

This simulation provides an overview of how to initiate, approve and process a new hire template transaction in UCPath for an employee named Jose Merced.

This simulation is for informational purposes only. The tasks included in this simulation are performed by those with the appropriate UCPath security role.



 The following tasks are covered in this demonstration: Initiate a new hire template (Location Template Initiator). 	Step	Action
- Approve a new hire template (Location Template Approver). - Process a new hire template (UCPC WFA Production).	1.	 The following tasks are covered in this demonstration: Initiate a new hire template (Location Template Initiator). Approve a new hire template (Location Template Approver). Process a new hire template (UCPC WFA Production).



		N	ew Window Help Personalize
art HR Transactions			
a template and press Create Transaction.			
isaction Template 📀			
Transaction Type All	\checkmark	Effective Date	
Select Template			Create Transaction
Transaction Type All	✓ Refresh		
sactions in Progress 👔			
You do not have any transactions in progress.			
G0 T0 Transaction Status			
Iransaction Status			

Step	Action
2.	Location Template Initiators use the Smart HR Transactions page to initiate a new hire template in UCPath.
3.	Click the Look up Select Template button.



	Look Up Select Te	mplate	× New Window I He
Smart HR Transactions	Search by: Templa	ate V begins with	
select a template and press Create Transaction.	Look Up Can	Advanced Lookup	
Transaction Template (?)	Search Results		
Transaction Type All	View 100	First 🕚 1-21 of 21 🕑 Last	194
	lemplate	Description	
Select Template	UC_ADD_CWR	Add Contingent Worker - No Position Data	Create Transaction
	UC_ADD_CWR_POSN	Add Contingent Worker With Position	
Transaction Type All	UC_COM_CWR	Complete Contingent Worker Instance	
T (1) D	UC_CONC_HIRE	Staff Concurrent Hire/Inter Location Transfer	
Transactions in Progress (2)	UC_CONC_HIRE_AC	Academic Concurrent Hire/Inter Location Transfer	
You do not have any transactions in progress	UC_EXT_CWR	Extend CWR Appointment	
	UC_EXT_CWR_POSN	Extend CWR (with Position) Appointment	
Go To Transaction Status	UC FULL HIRE	Full Hire - Staff Only	
	UC_FULL_HIRE_AC	Full Hire - Academic Use Only	
	UC_INVOL_TERM	Involuntary Termination	
	UC_PERSON_DATA	UC Personal Data	
	UC_REHIRE	UC Rehire - Staff Only	
	UC_REHIRE_AC	Rehire - Academic	
	UC_REHIRE_REI	Rehire Reinstatement - For Staff Appointments	
	UC_REHIRE_REI_AC	Rehire Reinstatement - For Academic Appointments	
	UC_RENW_CWR	Renew Contingent Worker - Without Position	
	UC_RENW_CWR_POS	Renew CWR Instance - with Position	
	UC_RETIREMENT	Retirement	
	UC_TRANSFER	Intra-Business Unit Transfer - Staff Only	
	UC_TRANSFER_AC	Intra-Business Unit Transfer - Academic Only	

Step	Action
4.	Select the appropriate hire template. Notice there are two full hire templates, one for staff and one for academic.
	This example uses the UC_FULL_HIRE template.
	Click to select.
	UC FULL HIRE



		N	lew Window Help Personalize Pa
Creat UR Transactions			
Smart HR Transactions			
Select a template and press Create Transaction.			
Transaction Template (2)			
		Effective Data	
		Effective Date 31	
Select Template UC_FULL_HIRE × Q	Full Hire - Staff Only		Create Transaction
Transaction Tune			
	Refresh		
Transactions in Progress (?)			
You do not have any transactions in progress.			
G0 T0 Transaction Status			
			· · · · · · · · · · · · · · · · · · ·
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Step	Action
5.	Enter the Effective Date (hire date).
	Click in the Effective Date field.
6.	Click the Create Transaction button.
	Create Transaction



	Now Window	Holp Percenalize Pag
Smart HR Transactions	New Wildow	Theip Thersonalize Fag
Enter Transaction Details		
The following transaction details are required.		
Template Full Hire - Staff Only		
Organizational Relationship Employee		
*Employee ID NEW × O		
*Effective Date Devision 100		
ACTION HIRE		
*Address Format Linited Otation		
United States		
Continue		

Step	Action
7.	The Employee ID field defaults to NEW .
	The system automatically generates the next sequential UC Employee ID after the UCPC WFA Production team processes the new hire template.
8.	Select the appropriate Reason Code .
9.	Click the Continue button.



		New Window Help Personalize Page
nart HR Transactions		
nter Transaction Informati	on	
lick here to Hide Header Deta	ls	
emplate: UC_FULL_HIRE ffective Date: 08/01/2018 mployee ID: NEW	Name: Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation) Employee Record:	
Personal Data Job Data Earns	Dist Addl Pay Employee Experience	
Employee Information		
Name - Legal Name/Name		
*Legal First Name	Legal Middle Name	
*Legal Last Name	Legal Suffix	
First Name	Middle Name	
Last Name		
Birthday Information		
Date of Birth	(ii)	
Person Education Level		
Highest Education Level A	٩	
Poreon National ID United States		
reison national ib onited states		

Step	Action
10.	The new hire template appears.
	Five tabs are available on this template: Personal Data , Job Data , Earns Dist , Addl Pay and Employee Experience .
	Fields that are required by the system are indicated with an asterisk (*).
11.	Complete the fields on the Personal Data tab.



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	New Window Help Personalize Pa
mart HR Transactions	
inter Transaction Information	
lick here to Hide Header Details	
emplate: UC_FULL_HIRE Name: iffective Date: 08/01/2018 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation) imployee ID: NEW Employee Record:	
Personal Data Job Data Earns Dist Addl Pay Employee Experience	
Employee Information	
Name - Legal Name/Name	
*Legal First Name Jose Legal Middle Name	
*Legal Last Name Merced Legal Suffix	
First Name Middle Name	
Last Name	
Birthday Information	
Date of Birth 04/01/1945	
Person Education Level	
Highest Education Level A	
Person National ID United States	
National ID Type PR Q National ID 545738798	
Person Address 01 - United States	
*Address Type Home V Address Line 1 7440 Oak Way	

Step	Action
12.	For this example, the fields have been filled out for you.
	Scroll down to complete additional Personal Information fields.
	Click the scroll bar.



UC Oath Date												
Oath Signature Date	1											
Person Phone Number		Personalize	Find View All	a 🔣	First	<u>۱</u>	1 of 1	۲	Last			
Phone Type		Telephone		Preferred								
1	~							+	-			
Person Email Address		Personalize	Find View All	0 🔜	First	<u>۱</u>	of 1	۲	Last			
Email Type		Email Addre	288									
1	~							+	-			
UC Patent Acknowledgment												
Patent Acknowledgment Sign Dt	31			Mod	lified Pa	atent	Ackn	nnt S	Sign Dt			
UC I-9 Information												
Tracker Profile ID				Ren	note I-9	Secti	on 2					
UC External System ID												
Business Unit	Q		External Syste	m					Q			
External System ID												
Comments												
Comments												
R										_		
eturn to Enter Transaction Details Page												
Save and Submit Sav	e for Later Ca	Incel Su	pporting document	s								

Step	Action
13.	Complete the additional Personal Information fields.

UC Oath Date				
Oath Signature Date 08/01/2018				
Person Phone Number	Personalize Find View All	🗵 🔣 🛛 First 🕚 1 of 1	Last	
Phone Type	Telephone	Preferred		
1 Mobile - Personal	503/234-7676		+ -	
Person Email Address	Personalize Find View All 🗇	First 🕘 1 of 1 🖗	Last	
Email Type	Email Address			
1 Home V	jmerced@yahoo.com	× +		
UC Patent Acknowledgment				
Patent Acknowledgment 33		Modified Patent Ackmn	t Sign Dt	
UC I-9 Information				
Tracker Profile ID		Remote I-9 Section 2		
UC External System ID				
Business Unit	External System	1	Q	
External System ID				
Comments				
Comments				
12				
leturn to Enter Transaction Details Page				
Save and Submit Save for Later Ca	ancel Supporting documents			
ransaction ID: NEW				



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Step	Action
14.	For this example the fields have been filled in for you.
	The Location Template Initiator can use the Comments field to enter specific details or explanation regarding the hire transaction.
	This field is referenced by UCPC WFA Production during their processing of the transaction.
15.	Scroll to the top of the page to navigate to the next tab.
	Click the scroll bar.

				New Window Help Personalize Pag
mart HR Transactions				
Inter Transaction Informati	on			
Click here to Hide Header Detai	s			
Template: UC_FULL_HIRE Effective Date: 08/01/2018 Employee ID: NEW	Name: Action/Action Reason: HIR/H Employee Record:	IIR (Hire - No Prior UC Affiliation)		
Personal Data Job Data Earns	Dist Addl Pay Employee E	Experience		
Employee Information				
Name - Legal Name/Name				
*Legal First Name Jose		Legal Middle Name		
*Legal Last Name Merced		Legal Suffix	٩	
First Name		Middle Name		
Last Name				
Birthday Information				
Date of Birth 04/01/194				
Person Education Level				
Highest Education Level A	Q			
Person National ID United States				
National ID Type PR	٩	National ID 545738798		
Person Address 01 - United State	\$			
*Address Type Home	\checkmark	Address Line 1 7440 Oak V	Vay	

Step	Action
16.	Click the Job Data tab.



		N	ew Window Help Personalize Page
Smart HR Transactions			
Enter Transaction Inform	ation		
Click here to Hide Header De	etails		
Template: UC_FULL_HIRE Effective Date: 08/01/2018 Employee ID: NEW	Name: Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation) Employee Record:		
Personal Data Job Data Ear	ms Dist Addi Pay Employee Experience		
Employee Information			
Work Location - Position Data	1		
*Position Number	Q		
Work Location - Job Fields			
Business Unit	Department		
Location Code	Establishment ID	٩	
Job Information - Job Code			
Job Code			
Job Information - United State	35		
FLSA Status	Y		
Job Labor - Union Code			
Union Code	Union Seniority Date	31	
Job Information - Reporting In	iformation		
Reports To Position Number			
Job Information Employee C	lassification		

Step	Action
17.	Use the Job Data tab to add the employee's position, job details and compensation.

	New Window Help Personalize Page
Smart HR Transactions	
Enter Transaction Information	
Click hare to Hide Header Dateils	
Template: UC_FULL_HIRE Name: Effective Date: 08/01/2018 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation)	
Employee ID: NEW Employee Record:	
Personal Data Job Data Earns Dist Addl Pay Employee Experience	
Employee Information	
Work Location - Position Data	
*Position Number 40005608	
Work Location - Job Fields	
Business Unit RVCMP Department D01200	
Location Code P5487 Establishment ID UCR	
Job Information - Job Code	
Job Code 007738	
Job Information - United States	
FLSA Status Exempt	
Job Labor - Union Code	
Union Code 99 Union Seniority Date B	
Job Information - Reporting Information	
Reports To Position 40022388 Number	
Job Information - Employee Classification	



	Step	Action
	18.	After the Position Number field is entered, the system automatically populates many of the Job Data fields based on the data from the position record.
		For this example the fields have been filled in for you.
Ī	19.	Click the scroll bar.

ob Information - Reporting	J Information				
Reports To Position 400 Number	022388				
ob Information - Employee	Classification				
*Employee Classification	٩	Classified/Unclassi	fied Professional & Support Staff Ind	\checkmark	
ob Information - Standard	Hours				
Standard Hours	40.000000	I	TE 1.000000		
IC Job Data					
Probation Code No	ne	Probation End E	ate 🔢		
Trial Employment End Date	Ħ	ERIT/Phased Retirem End	ent 🗾 🖻		
Location Use End Date	H	Location Use T	уре	~	
Alternate Work Week 7/4	0	PY Career Dura	ion	~	
IC Employee Review					
Review Type		V Next Review D	ate		
ob - Salary Plan					
Salary Administration CT Plan	RV	Salary Gr	ade 23		
Step		٩			
ob Compensation - Pay Co	omponents	Personalize Find View	All 💷 🔣 🛛 First 🕚 1 of	1 🕑 Last	
Comp Rate Code Com	pensation Rate Compen	sation Frequency Rate Cod	e Source		

Step	Action
20.	Complete the remaining Job Data fields.
	For this example the fields have been filled in for you.
21.	For academic hires, the Employee Classification field is automatically populated based on the job code and cannot be changed.
	For this example, the employee is a staff member, so the field must be entered manually.



Job Information - Reportin	ng Information							
Reports To Position 40 Number	0022388							
Job Information - Employe	e Classification							
*Employee Classification 2	C	L	Classified/	Unclassified Profes	ssional & Support Sta	ff 🔽		
Job Information - Standard	d Hours							
Standard Hours	40.000000			FTE	1.000000			
UC Job Data								
Probation Code	Vithin Probation	~	Probati	on End Date 02/01/	2019			
Trial Employment End Date	3	j	ERIT/Phase	d Retirement End Dt	<u>B</u>			
Location Use End Date	81	J	Locati	on Use Type		~		
Alternate Work Week 7	/40	~	PY Car	eer Duration		~		
UC Employee Review								
Review Type A	nnual Performance A	Apprais: 🗸	Next	Review Date 8/1/20	19 🛐			
Job - Salary Plan								
Salary Administration C Plan	TRV			Salary Grade 23				
Step			Q					
Job Compensation - Pay C	Components		Personalize Fir	nd View All 🔄	📕 🛛 First 🕚 1	of 1 🔮	Last	
Comp Rate Code Cor	mpensation Rate	Compensati	on Frequency	Rate Code Source				
1Q						+	-	
Work Location - Expected	Job End Date							

Step	Action
22.	Probation Code and Probation End Date are required if the class indicator is Professional and Support Staff and the employee class is either Career or Partial Year Career .
23.	Some jobs require a Step . After the Step is entered for the job, the compensation fields are automatically populated.
24.	Scroll down to complete the remaining Job Data fields. Click the scroll bar.
25.	If a Step is not associated with the job, the Comp Rate Code , Compensation Rate and Compensation Frequency fields must be entered manually, as in this example.



Step	Action
26.	If the employment is a short-term assignment or temporary hire, enter the date the job ends in the Expected Job End Date field. The employee will be automatically terminated on this date.
	An expected end date is required for the following employee classes: -Staff: Contract
	-Student: Casual/Restricted
	-Staff: Floater
	-Staff: Rehired Retiree
	-Academic: Post Docs
	-Academic: Recall
	-Academic: Academic Student
27.	The payroll-related Compensation Frequency field automatically populates based on the job code.
28.	Scroll up to navigate to the next tab.
	Click the scroll bar.

	New Window Help
Smart HR Transactions	
Enter Transaction Information	
Click here to Hide Header Details	
Template: UC_FULL_HIRE Name: Effective Date: 08/01/2018 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation) Employee ID: NEW Employee Record:	
Personal Data Job Data Earns Dist Addl Pay Employee Experience	
Employee Information	
Work Location - Position Data	
*Position Number 40005608	
Work Location - Job Fields	
Business Unit RVCMP Department D01200	
Location Code P5487 Establishment ID UCR Q	
Job Information - Job Code	
Job Code 007738	
Job Information - United States	
FLSA Status Exempt	
Job Labor - Union Code	
Union Code 99 Union Seniority Date	
Job Information - Reporting Information	
Reports To Position 40022388 Number	
Job Information Employee Classification	

Step	Action
29.	Click the Earns Dist tab.
	Earns Dist



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nier Transactio	n mormatio	n			
lick here to Hide	Header Details	3			
emplate: UC_FI	JLL_HIRE I 2018 /	Name: Action/Action R	teason: HIR/HI	R (Hire - No Prior UC Affiliation)	
nployee ID: NEW	I	Employee Reco	ord:		
Personal Data Job	Data Earns Di	st Addl Pay	Employee Ex	(perience	
mployee Informati	on				
Job Earnings Dist	ibution Type				
Earnings Distri	Type		~	Aggregate Comp Rate	
Job Earnings Dist	ribution	F	Personalize Fin	id View All 🔄 🔢 🛛 First 🛞 1 of 1 🛞 Last	
Earnings Code		Compensation F	Rate	Percent of Distribution	
1					
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tetum to Enter Transac Save and Submi ransaction ID: itiator Comments:	NEW				

Step	Action
30.	Use the fields in the Job Earnings Distribution section if the standard earnings for the employee just be distributed.
31.	Click the Addl Pay tab.



Brand HR Transactions Enter Transaction Information Click here to Hide Header Details Template: UC_FULL_HIRE Name: Effective Date: Objoing Data Earns Dis Addi Pay Employee B: Network Addi Pay Employee Information Additional Pay Personal Data Job Data Earnings Code Reson for Additional Pay Effective Date Earnings Code Reson for Additional Pay Effective Date Earnings Code Reson for Additional Pay Earnings End Data Addit Pay Amount Hout Specified Click here to Hide Header Details Personal Data Job Data Earnings Code Reson for Additional Pay Earnings End Data Save for Later Cancel Supporting documents Ender Net Section Dis <td< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>New Window I Lio</th></td<>									New Window I Lio
Enter Transaction Information Click here to Hide Header Details Femplate: UC_FULL_HIRE Name: Serve Date: 000/1/2018 Employee Date: 000/1/2018 Employee Dis: NEW Employee Dis: NEW Employee Information Additional Pay Personal Data Job Data Earnings Code Return to Enter Transaction Details Page Save and Submit Save for Later Cancel Supporting documents Image: NetW Intia Applor Acquester ID: 10173879 Antia Applor	mar	t HR Transaction	s						New Window Hei
Click here to Hide Header Details Femplate: UC_FULL_HIRE Name: Stefetive Date: 08/01/2013 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation) Employee ID: NEW Employee Record: Personal Data Job Data Earns Dist AddI Pay Employee Experience Employee Information First I of 1 of 1 le Last Additional Pay Personalize Find View All I II III IIII First IIIII of 1 le Last Additional Pay Personalize Find View All IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Inte	r Transaction	Information						
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Additional Case Addition/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation) imployee ID: NEW Employee Record: Personal Data Job Data Earns Dist Additional Pay Personalize Find View All [Imployee Record: Employee Information Additional Pay Personalize Find View All [Imployee Record: Employee Information Additional Pay Personalize Find View All [Imployee Record: Return to Enter Transaction Details Page Save and Submit Save for Later Cancel Supporting documents Requester ID: 10173879 Antila Applor Requested:	omr	late: LIC FUI	L HIRE Name						
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Personal Data Job Data Earns Dist Addl Pay Employee Experience	mpl	oyee ID: NEW	Employ	ee Record:					
Employee Information Additional Pay Personalize Find View All [2] [2] First (1 of 1) Last Effective Date Earnings Code Reason for Additional Pay Earnings End Date Addit Pay Amount Hourh 1 100 [2] [2] [2] [2] [2] [2] [2] [2] [2] [2]	Per	sonal Data Job D	ata Earns Dist 4	ddl Pay Employee Exp	erience				
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Image: Control of the system of the syste		Effective Date	Earnings Code	Reason for Additional Pay		Earnings End Date	Add'l Pay Amount	Hourly	
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Save and Submit Save for Later Cancel Supporting documents Transaction ID: NEW nitiator Comments:		<						>	
Save and Submit Save for Later Cancel Supporting documents 'ransaction ID: NEW itiator Comments:	Retu	rn to Enter Transacti	n Details Page						
Transaction ID: NEW Initiator Comments:		Save and Submit	Save for La	ter Cancel	Supporting doci	uments			
nitiator Comments: tequester ID: 10173879 Anitia Applor tequested:	ran	saction ID:	NEW						
Requester ID: 10173879 Anitia Applor Requested:		tor Comments:							
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	nitia Requ								
	nitia tequ	ested:							

Step	Action
32.	Use the fields in the Additional Pay section if the hire offer includes incentive pay or additional pay.
33.	Click the Employee Experience tab.



mart HR Transacti	ons							New Window Help
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lick here to Hide	Header Det	ails						
		ians Maria						
emplate: UC_F ffective Date: 08/01	ULL_HIRE /2018	Name: Action/Action	on Reason: HI	R/HIR (Hire - No Prior	r UC Affiliation)			
mployee ID: NEW		Employee F	Record:					
Personal Data Jol	Data Earns	s Dist Addl F	Pay Employe	ee Experience				
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Employee Experie	nce			Personalize Find	View All 💷 🔣	First 🕚 1 (of 1 🛞 Last	
Employer Name	Job Desc	ription S	tart Date	End Date	UC Relevant Experier	ice	UC Relevant Se	
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Save and Subm	it	Save for Later	Canc	el Supporting do	cuments			
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Step	Action
34.	For represented staff, use the fields on this page to enter data related to the employee's prior work experience. Having this information is helpful in determining new compensation rates for the new hire.
	The information entered in the Employee Experience section is copied to the employee's UC Employee Experience page after the template is fully processed by UCPC WFA Production.
35.	The Supporting documents link can be used to attach documents to the new hire transaction, if needed.
36.	Click the Save and Submit button. Save and Submit



		New Window Help
Smart	HR Transactions	
Subr	nit Confirmation	
~	The submit was successful. The Human Resources department will review the person's data and update the HR system.	
	Go to the Transaction Status page to review the status of this person.	
OK		



Transaction Type All					
Transaction Type All					
Select Template		~	Effective Date	31	
Select remplate/	Q				Create Transaction
Transaction Type All		✓ Refres	sh		
nsactions in Progress			Personalize	Find 🔄	📕 🛛 First 🕙 1 of 1 🕑 Las
t Transaction Type E	Effective Date Name		Person ID	Action	Country
HIREJPM	08/01/2019 Jose Merced	i	NEW	Hire	United States
Go To Transaction Status					



Step	Action
38.	The template transaction is routed for approval and appears in the Transactions in Progress section until it is approved.



Step	Action
39.	The next task demonstrates how a Location Template Approver reviews and
	approves the new hire template transaction.



Vorklist					New W	/indow Help
/orklist for Ro	over Apple		Worklist Filters	~	Feed -	
/orklist Items					Per	sonalize Find
m	Date From	Work Item	Worked By Activity	Priority Link		
itia Apptor	09/04/2018	Approval Routing	Approval Workflow	UC 4995 2016 UC EFFI BUS RDC	RVCMP_SmartHRTemplate_ 2. UC RVCMP_SHR_Hire_ -01-02. N. 0. TRANSACT_ID:T0000022455 UD:NEW 0T_NOKEY:2018-08-01 INESS_UNIT.RVCMP :RA.0.A	Mar
Refresh						

Step	Action
40.	The Location Template Approver can access transactions that need approval from the email notification or by navigating to their Worklist .
	Worklist can be accessed from the dashboard or from a Homepage.
	Workforce Administration (Homepage) > Approvals (Tile) > My Worklist - Summary View
	For this example, the template transaction is accessed from the Workforce Administration Homepage.



Vorklist Vorklist for Re	over Apple					
tail View			Worklist Filters	~	Feed -	
orklist Items	S Data Carro	Minute Manage	Marked Dr. Astron	Delevite	Per	rsonalize Find
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				RDC	::RA.0.A.	
Refresh						
Refresh						

Step	Action
41.	The Worklist page displays all transactions that require action.
42.	Click the appropriate worklist item. For this example, click the UC_RVCMP_SmartHRTemplate, 49952, UC RVCMP SHR Hire link.
	UC RVCMP SmartHRTemplate, 49952, UC RVCMP SHR Hire, 2016-01-02, N, 0, UC TRANSACT ID:T000022455 EMPLID:NEW EFFDT NOKEY:2018-08-01 BUSINESS UNIT:RVCMP RDC:RA,0,A,



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1 Jose Mersed	Employee	09/01/2019		
1 JOSE MEICED	Employee	06/01/2018	HIR	USA
Initiator Comment				
Requester ID 10173879 Anitia Ap	otor			
Requested 09/04/18 12:54:17.000000PM				
Approve		Denv		
, pproto		Dony		
Approver Comment				
LIDE				
		Effet: 2019 0	0 01 Uni	
HIRE	100, ID: NEVV	, Endt: 2018-0	8-01, UNI	
Pending				
Approver 1 - Hire				
Deturs to Occursts				
Return to Search				

Step	Action
43.	For template transactions that require approval, the SS Smart HR Transactions page appears.
	This page displays some Hire Details , as well as a link to the hire template transaction so the transaction can be reviewed in detail before approving.
44.	Click the Jose Merced link to review the template transaction details.



mart HD Transactions	New Window Help
Inter Transaction Details	
Name Jose Merced	
e following transaction details are required.	
Template Full Hire - Staff Only	
Organizational Relationship Employee	
*Employee ID NEW × Q	
*Effective Date 08/01/2018	
Action Hire	
*Reason Code Hire - No Prior UC Affiliation	
*Address Format United States	
Continue Cancel	

Step	Action
45.	Review the Transaction Details page, which identifies the new hire's Name , the type of Template , the Organizational Relationship , the Effective Date and the Reason Code for the hire.
46.	Click the Continue button.



	New Window Help Personalize Pa
mart HR Transactions	
nter Transaction Information	
lick here to Hide Header Details	
emplate: UC_FULL_HIRE Name: ffective Date: 08/01/2018 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation) mployee ID: NEW Employee Record:	
Personal Data Job Data Earns Dist Addl Pay Employee Experience	
Employee Information	
Name - Legal Name/Name	
*Legal First Name Jose Legal Middle Name	
*Legal Last Name Merced Legal Suffix	
First Name Middle Name	
Last Name	
Birthday Information	
Date of Birth 04/01/1945	
Person Education Level	
Highest Education Level A	
Person National ID United States	
National ID Type PR Q National ID 545738798	
Person Address 01 - United States	
*Address Type Home Address Line 1 7440 Oak Way	

Step	Action
47.	The Location Approver reviews the information on each tab of the template transaction to ensure it is complete and accurate.
	Date of Birth and National ID fields are masked for the Location Approver.
48.	Click the scroll bar.



UC External System ID Business Unit External System ID External System ID Comments Comments Comments Save and Submit Save Cancel Supporting documents Transaction ID: T000022455 Initiator Comments: Initiator Comments: Requester ID: 10173879 Anita Apptor Requested: 09/04/18 12:54:17.000000PM HIRE Transaction: T000022455, ID: NEW, Effdt: 2018-08-01, Unit: RVCMP:Pending @View/Hide Comments	
Business Unit External System External System ID Comments Comments Comments Return to Enter Transaction Details Page Save and Submit Save Cancel Supporting documents Transaction ID: T000022455 Ititator Comments: requester ID: 10173879 Antia Apptor Requester ID: 1000022455, ID: NEW, Effdt: 2018-08-01, Unit: RVCMP:Pending @View/Hide Comments HIRE Pending Multiple Approvers - time	
External System ID Comments Comments Comments Comments Save and Submit Save Cancel Supporting documents Transaction ID: T000022455 nitiator Comments: Requester ID: 10173879 Anitia Applor Requester ID: 10173879 Anitia Applor Requested: 09/04/18 12:54:17.000000PM IIRE Transaction: T000022455, ID: NEW, Effdt: 2018-08-01, Unit: RVCMP:Pending @View/Hide Comments HIRE Pending Pending Multiple Approvers	
Comments Image: Comments Return to Enter Transaction Details Page Save Save and Submit Save Cancel Supporting documents ransaction ID: 1000022455 ittator Comments: Image: Comments Lequester ID: 10173879 Antia Applor Lequester Lequester 09/04/18 12:54:17.000000PM IRE Transaction: T000022455, ID: NEW, Effdt: 2018-08-01, Unit: RVCMP:Pending ©View/Hide Comments Image: Pending Multiple Approvers Image: Pending Multiple Approvers	
Comments Edum to Enter Transaction Details Page Save and Submit Save Cancel Supporting documents ransaction ID: T000022455 ititator Comments: equester ID: 10173879 Antia Applor equester ID: 10173879 Antia Applor equester ID: 09/04/18 12:54:17.000000PM IRE Transaction: T000022455, ID: NEW, Effdt: 2018-08-01, Unit: RVCMP:Pending ©View/Hide Comments HIRE Pending Multiple Approvers Multiple Approvers Multiple Approvers	
Return to Enter Transaction Details Page Save and Submit Save Cancel Supporting documents ransaction ID: T000022455 ititator Comments:	
Save Cancel Supporting documents ransaction ID: T000022455 itiliator Comments:	
ransaction ID: T000022455 ititiator Comments: equester ID: 10173879 Antiia Apptor equested: 09/04/18 12:54:17.000000PM IRE Transaction: T000022455, ID: NEW, Effdt: 2018-08-01, Unit: RVCMP:Pending ©View/Hide Comments HIRE Pending Multiple Approvers 1 Mire Pending Multiple Approvers 1 Mire Pending	
equester ID: 10173879 Antila Applor equested: 09/04/18 12:54:17.000000PM IRE Transaction: T000022455, ID: NEW, Effdt: 2018-08-01, Unit: RVCMP:Pending ©View/Hide Comments HIRE Pending Multiple Approver Approver 1 - Hire 	
equested: 09/04/18 12:54:17.000000PM RE Transaction: T000022455, ID: NEW, Effdt: 2018-08-01, Unit: RVCMP:Pending ©View/Hide Comments HIRE Pending Multiple Approver	
IRE Transaction: T000022455, ID: NEW, Effdt: 2018-08-01, Unit: RVCMP:Pending Overwirkide Comments IRE Pending Multiple Approver	
Transaction: T000022455, ID: NEW, Effdt: 2018-08-01, Unit: RVCMP:Pending OverviHide Comments HIRE Pending Multiple Approver	
HIRE Pending Multiple Approver 1 - Hire	
Pending Multiple Approvers Approver 1 - Hire	

Step	Action
49.	When the review is complete, click the Cancel button to return to the approval page.
	Cancel



						New Window H
S Smart HR Transactions						
Transaction Details						
Transaction ID T000022455		Transaction St	atus Pend	ling		
Hire Details	Personalize	Find View All	I 📰	First ④ 1 of 1 🕭 Last		
Name	Type of Hire	Start Date	Action	Country		
1 Jose Merced	Employee	08/01/2018	HIR	USA		
Requester ID 10173879 Requested 09/04/18 12:54:17: Approve	Anitia Apptor 000000PM	Deny				
Approver Comment						
HIRE					7	
Iransaction: If HIRE Pending Multiple Approvers Approver 1 - Hire Notify	-+	Επατ: 2018-0	8-0'1, U1	nit: KVGMP:Pendinş		

Step	Action
50.	If the hire template is completed accurately, click the Approve button.
51.	If there are multiple approvers, the transaction moves to the Worklist of the next approver.



/orklist /orklist for I	Rover Apple		Working Filess						
tail View				- L Find L Sour All 1		Feed -	6 A 45 A (6	D L ant	
m	Date From	Work Item	Worked By Activity	Priority	Link	FIISL	v 1011	Last	
Refresh									

Step	Action
52.	After the template transaction is approved, it is removed from the approver's Worklist .





Step	Action
53.	The next task demonstrates how UCPC WFA Production processes the new hire
	template transaction.

Manage T	ransactic	ons Insactions	ready to be processed.			Ne	w Window Help 🗐 木
	*Tr *Tra Effe	ransaction nsaction ctive Date	n Type All Status All From 08/01/2018 [1] To Refresh	Business Unit Correction Business Unit Correction Empi ID Correction East Name Processor ID	٩		
Transaction	update	s 🕐	Processor Name	Template Description	Effective Date	First Name	Last Name
				Full Hire - Staff Only	08/01/2018	Jose	Merced
				Academic Concurrent Hire/Inter Location Transfer	08/01/2018	Theodore	Jacques
				Involuntary Termination	08/01/2018	Kara	Mccloskey
				Voluntary Termination	08/02/2018	Ernest	Garcia
			Kimberlee Sterman	Add Contingent Worker With Position	08/06/2018	Cory	Franz
				Add Contingent Worker With Position	08/06/2018	Cory	Franz
				Full Hire - Academic Use Only	08/13/2018	Cody	Simons
<				Involuntary Termination	08/14/2018	Selasie	De Souza

Step	Action
54.	UCPC WFA Production uses the Manage Transactions page to access template transactions that have completed the Location AWE process. WFA Production reviews the template transaction, reviews each of the employee data components and saves the data to UCPath.
55.	To access the template transaction, click the employee's first name. For this example, click the Jose link.

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		New Window Help 🗐
Manage Transactions		
Manage Transaction Details		
Name Jose Merced		
Template UC_FULL_HIRE - Full Hire - Staff Only		
Transaction Type Hire/Rehire and Profile Data		
Status Requested		
Organizational Relationship Employee		
Effective Date 08/01/2018 ×		
Action Hire		
Action Reason Hire - No Prior UC Affiliation		
Person Information		
Employee ID NEW	Search for Matching Persons	
Complete Transaction		
Select this button to open the original template to complete the transaction.	Open Template	
Personal Data		
Select this button to upload Personal Data. You may view/update the data before saving it to the system.	Add Personal Data	
Return to Manage Transactions		

Step	Action
56.	Review the details of the transaction, including Template , Effective Date and Action Reason .
57.	Perform a search to ensure the person does not already exist in UCPath.
	Click the Search for Matching Persons link.
	Search for Matching Persons



					_
Managa Transactions					New Window Help 💷
Manage Transaction Det	taile				
Manage Transaction Det	lans				
Name Jose Me	lerced				
Template UC_FUI	JLL_HIRE - Full Hire	e - Staff Only			
Transaction Type Hire/Rel	ehire and Profile Dat	la			
Status Reques	sted				
Organizational Relationship Employe	ree				
Effective Date 08/01/2	2018	Managan		1	
Action Hire		Message			
Action Reason Hire - N	No Prior UC Affiliation	Person search match did not find any person	in the system. (1007,70)		
Person Information					
Employee ID NEW		OK		Persons	
Complete Transaction					
Select this button to open the original	al template to compl	ete the transaction.	Open Temr		
			Open rem	blate	
Personal Data					
Select this button to upload Personal	I Data. You may vie	w/update the data before saving it to the system	n		
			Add Persona	Data	
Return to Manage Transactions					
riotari to manago riandaviono					

Step	Action
58.	Click the OK button.
59.	Next, the new hire template is reviewed. Click the Open Template button.
	Open Template



	New Window I Heln I
Manage Transactions	
Manage Transaction Details	
Name Jose Merced	
The following transaction details are required.	
Template Full Line Staff Only	
Organizational Relationship Employee	
*Employee ID NEW × Q	
Effective Date 08/01/2018	
Action Hire	
Reason Code Hire - No Prior UC Affiliation	
Address Format United States	
Continue Cancel	

Step	Action
60.	Review the Manage Transaction Details page, which includes the new hire's Name , the type of Template , the Organizational Relationship , the Effective Date and the Reason Code for the hire.
61.	Click the Continue button.



	New Window Help Personalize Pa
nart HR Transactions	
nter Transaction Information	
lick here to Hide Header Details	
emplate: UC_FULL_HIRE Name: ffective Date: 03/01/2018 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation) mployee ID: NEW Employee Record:	
Personal Data Job Data Earns Dist Addl Pay Employee Experience	
Employee Information	
Name - Legal Name/Name	
*Legal First Name Jose Legal Middle Name	
*Legal Last Name Merced Legal Suffix Q	
First Name Middle Name	
Last Name	
Birthday Information	
Date of Birth 04/01/1945	
Person Education Level	
Highest Education Level A	
Person National ID United States	
National ID Type PR Q National ID 545738798	
Person Address 01 - United States	
*Address Type Home Address Line 1 7440 Oak Way	

Step	Action
62.	This page displays the template in view-only format. UCPC WFA Production reviews each tab of the template.
63.	Click the scroll bar.

Person Education Level			
Highest Education Level			
Person Gender			
UC Oath Date			
Oath Signature Date 08/01/2018			
Person Phone Number	Personalize Find View All	코 🔣 First 🕚 1 of 1	🕑 Last
Phone Type	Telephone	Preferred	
1 Mobile - Personal	503/234-7676		+ -
Person Email Address	Personalize Find View All	□ □ 🔜 First 🕚 1 of 1	Last
Email Type	Email Address		
1 Home	 jmerced@yahoo.com 		+ -
UC Patent Acknowledgment			
Patent Acknowledgment 08/01/2018 Sign Dt		Modified Patent Ack	nnt Sign Dt
UC I-9 Information			
Tracker Profile ID		Remote I-9 Section 2	
UC External System ID			
Business Unit	External System	em	
External System ID			
Comments			
Comments			
12			



Step	Action
64.	Click the scroll bar.
65.	When the review of all tabs on the template is complete, return to the Transaction Details page to begin processing the transaction.
	Click the Cancel button.

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dow Help

Step	Action
66.	Next, review the staged employee information and save the data to the UCPath tables in the following order: 1. Personal Data 2. Job Data 3. Profile Data
67.	Click the Add Personal Data button. Add Personal Data



			_	_		
Biographical Details Contact Information Regional	Organizational Relationships	UC Personal Dat	ta			
Jose Merced	Person ID	NEW				
Name	Find View All	First 🕚 1 of 1		Las	st	
*Effective Date 08/01/2018 × 3				+	-	
Name Jose Merced	Edit L	egal Name/Name				
Biographic Information						
Date of Birth 04/01/1945 Years	73 Months 5					
Birth Country USA	United States					
Birth Location		Destastion				
Disgraphical History		Protection				
Biographical History	Fiña view All	First 🐨 1 of 1	© 1	_ast	1	
*Effective Date U8/U1/2018					1	
*Highest Education Level I-Master's Level Degree	~					
*Marital Status Not Used at UC	✓ As of	31				
Language Code 🗸						
Alternate ID						
Full-Time Student						
National ID Personal	ze Find View All 💷 🗮	First 🕢 1 of 1	1 🛞	la	st	
*Country *National ID Type	National ID	Primary ID				
USA Q Social Security Number	545-73-8798		+	-		
			_	_		

Step	Action
68.	The employee information is pulled from the template staging tables. Review each tab of the employee's Personal Data before saving the information to the component tables. When the Personal Data is saved, the employee ID is assigned and the personal information becomes available for other users (who have the appropriate security access) to view in UCPath.
69.	Click the OK button.
	OK



			New Window Help
Manage Transactions	D-1-1-		
Manage Transaction	Details		
Name	Jose Merced		
Template	UC_FULL_HIRE - Full Hire - Staff Only		
Transaction Type	Hire/Rehire and Profile Data	View Template	
Status	Requested		
Organizational Relationship	Employee		
Effective Date	08/01/2018		
Action	Hire		
Action Reason	Hire - No Prior UC Affiliation		
Person Information			
Employee ID	10033264		
	Create new Org Instance Instance Nbr 0		
Personal Data			
Select this link to view Person	al Data that was successfully uploaded to the system.	View/Edit Personal Data	
Job Data			
Select this button to upload Jo	ob Data. You may view/update the data before saving it to the system.	Add Job Data	
Return to Manage Transactions	3		

Step	Action
70.	At this point the employee's Personal Data is saved, and the Employee ID appears.
71.	Next, review and save the employee's Job Data . Click the Add Job Data button.
	Add Job Data



ork Location Job Information	Job Labor	Payroll	Salary Plan	Compensation	UC Job Dat	ta		1	New Window	/ Help
ose Merced nployee			Er Empl R	npl ID 10033264 ecord 0						
ork Location 👔							Find	First 🕚 1 of 1	Last	
*Effective Date Effective Sequence	08/01/2018	× H			*Action Hi	re		Go To Row	•••	
HR Status Payroll Status	Active Active			*Jot	Indicator Pr	re - No Prior UC imary Job	Affiliation	Current	1] 	
Position Number	40005608 Override	Q e Position D	PROCUR	EMENT ANL 4						
Position Entry Date	08/01/2018	nagement	Record							
Regulatory Region	USA		United Sta	ates						
Company	UCS		University	of California						
Business Unit	RVCMP		UC Rivers	ide Campus						
Department	D01200		Plant Adn	inistration						
Department Entry Date	08/01/2018									
Location Establishment ID	P5487 UCR	٩	CORP A UC Rivers	iide		Dat	e Created 09	/04/2018		
Last Start Date Expected Job End Date	08/01/2018	31	🗆 End J	ob Automatically						
Job Data Emp	loyment Data		Earnin	gs Distribution		Benefi	ts Program Pa	rticipation		

Step	Action
72.	The job information is pulled from the template staging tables. Review each tab of the employee's Job Data before saving the information to the component tables.
73.	Click the OK button.



Manage Transactions
Manage Transaction Details
Name Jose Merced
Template UC_FULL_HIRE - Full Hire - Staff Only
Transaction Type Hire/Rehire and Profile Data View Template
Status Requested
Organizational Relationship Employee
Effective Date 08/01/2018
Action Hire
Action Reason Hire - No Prior UC Affiliation
Person Information
Employee ID 10033264
HR Status Active Person Organizational Summary
Create new Org Instance Instance Nbr 0
O Use existing Org Instance
Personal Data
Select this link to view Personal Data that was successfully uploaded to the system.
viewzuit reisonal bata
Job Data
Select this link to view Job Data that was successfully uploaded to the system.
View/Edit Job Data
Profile Data
Salant this hutton to unload Pareon Profile Data. You may view/undate the data hefore eaving it to the

Step	Action
74.	Click the scroll bar.

Name	e Jose Merced	
Template	UC_FULL_HIRE - Full Hire - Staff Only	
Transaction Type	e Hire/Rehire and Profile Data	View Template
Status	Requested	
ganizational Relationship	Employee	
Effective Dat	e 08/01/2018	
Action	1 Hire	
Action Reason	Hire - No Prior UC Affiliation	
Person Information		
Employee I	D 10033264	
HR Statu	s Active	Person Organizational Summary
	Create new Org Instance Instance Nbr 0	
	O Use existing Org Instance	
Personal Data		
Select this link to view Pers	sonal Data that was successfully uploaded to the system.	View/Edit Personal Data
		viewicult Personal Data
Job Data		
Select this link to view Job	Data that was successfully uploaded to the system.	
		View/Edit Job Data
Profile Data		
Select this button to upload	Person Profile Data. You may view/update the data before saving it to the	
system.	· · · ·	Add Profile Data
eturn to Manage Transactiv	ากร	
starriso manage transactio	na	



Step	Action
75.	Finally, review and save the employee's Profile Data .
	Click the Add Profile Data button.
	Add Profile Data

	New Window I Help I
Empl ID 10033264 Jaco Marcad	
Drafie Type PEPSON LIC Person	
*Profile Status Active	
*Description lose Marrad	
peperihana nose mercen x	
Print Comments Profile Actions [Select Action]	
Qualifications Education Oath / Patent Signature Date Multi-Location Appointments UC Student Status D	
▼ Honors and Awards	
There are currently no Honors and Awards for this profile. Please add one if required.	
Add New Honore and Awards	
Licenses and Certifications	
There are currently no Licenses and Certifications for this profile. Please add one if required.	
Add New Licenses and Certifications	
Save	
Return to Previous Page	

Step	Action
76.	Review each tab of the employee's Profile Information before saving the information to the component tables.
77.	Click the Save button.



			New Window Help
Manage Transactions			
Manage Transactio	n Details		
Name	Jose Merced		
Template	UC_FULL_HIRE - Full Hire - Staff Only		
Transaction Type	Hire/Rehire and Profile Data	View Template	
Status	Completed		
Organizational Relationship	Employee		
Effective Date	08/01/2018		
Action	Hire		
Action Reason	Hire - No Prior UC Affiliation		
Person Information			
Employee ID	10033264		
HR Status	Active	Person Organizational Summary	
Personal Data			
Select this link to view Perso	nal Data that was successfully uploaded to the system.	View/Edit Personal Data	
Job Data			
Select this link to view Job D	lata that was successfully uploaded to the system.	View/Edit Job Data	
Profile Data			
Select this link to view Perso	n Profile Data that was successfully uploaded to the system.	View/Edit Profile Items	
Return to Manage Transaction	<u>15</u>		

Step	Action
78.	The new hire has been processed into UCPath.
79.	You have viewed a simulation of how to initiate, approve and process a new hire template transaction in UCPath. End of Procedure.