

This simulation provides an overview of how to initiate, approve and process a termination template transaction in UCPath for 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.



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



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Step	Action
2.	Location Template Initiators use the Smart HR Transactions page to initiate a termination template in UCPath.
3.	Click the Select Template button.
	Note: The Transaction Type fields are not used by UC.



Smart HR Transactions Search by: Template begins with		Look Up Select Te	emplate	×	1		
Transaction Template ? Search Results Transaction Type All Template Description Select Template UC_ADD_CWR UC_ADD_CWR Add Contingent Worker - No Position Data UC_ADD_CWR Contingent Worker - No Position Data UC_ADD_CWR Contingent Worker With Position Data UC_ADD_CWR Contingent Worker With Position Data UC_ADD_CWR Contingent Worker With Position Data UC_CONC_HIRE Staff Concurrent Hire/Inter Location Transfer UC_CONC_HIRE_AC Academic Concurrent Hire/Inter Location Transfer UC_EXT_CWR Extend CWR Apointment UC_EXT_CWR Extend CWR Apointment UC_FULL_HIRE AC Full Hire - staff Only UC_REHIRE UC Personal Data UC_REHIRE_AC Rehire Reinstatement - For Academic Apointments UC_REHIRE_AC Rehire Reinstatement - For Academic Apointments UC_REHIRE_AC Rehire Reinstatement - For Academic Apointments UC_RENW_CWR Renew Contingent Worker - Academic Apointments UC_REHIRE_REL_AC Rehire Reinstatement - For Academic Apointments UC_RENW_CWR Renew Contingent Worker - Academic Apointments UC_RENW_CWR Renew Contingent Worker - Academic	Smart HR Transactions Belect a template and press Create Transaction.	Search by: Templ	ate v begins with Advanced Lookup	Help		New Wind	Jow Help
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Step	Action
4.	Select the appropriate termination template. Notice there are two termination templates, one for voluntary termination and one for involuntary termination.
	This example uses the UC_VOL_TERM template.



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Step	Action
5.	Click in the Effective Date field.
6.	Enter the desired information into the Effective Date field. For this example, enter 11/1/2018 .
7.	Click the Create Transaction button. Create Transaction



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Smart HR Transactions			
Enter Transaction Details			
The following transaction details are required.			
Template Voluntary Termination			
Organizational Relationship Employee			
*Employee ID			
*Employment Record Number			
*Effective Date 11/01/2018			
Action Termination			
*Reason Code			
Continue Cancel			

Step	Action
8.	Perform a search for the employee to terminate, or type the employee's ID in the Employee ID field.

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Orga	anizational Relationship	Employee						
	*Employee ID	10033264 🔍	Jose Merced					
*Emple	oyment Record Number	0 (PROCUREMENT ANL 4)	\sim					
	*Effective Date	11/01/2018						
	Action	Termination						
	*Reason Code	Resign - Moved out of Area	\sim					
Continue	e Cancel							
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Step	Action
9.	Select the appropriate Employment Record Number if the employee has multiple jobs. Then enter the termination Effective Date and Reason Code .
10.	Click the Continue button.
	Continue

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Employee ID:	10033264	Employee Record:	0 (PROCUREMENT ANL 4)		
Return to Ente	r Transaction Details Pag	e			
Save	and Submit	Save for Later	Cancel		
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Step	Action
11.	The termination template appears with the employee's Position Number , Business Unit , Department , Location Code and Last Date Worked .
	Note: The Last Date Worked field is automatically populated with a date that is one day prior to the Effective Date that was entered. This field can be updated if necessary. Changing the Last Date Worked does not change the Effective Date; however, the Last Date Worked must be prior to the Effective Date.
12.	Enter comments for the termination transaction, if needed.
13.	Click the Save and Submit button.



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~	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					
Add P	ayroll Request				

Step	Action
14.	Click the OK button.
15.	The template transaction is routed for approval and appears in the Transactions in Progress section until it is approved.





Step	Action
16.	The next task demonstrates how a Location Template Approver reviews and approves the termination template transaction.





Step	Action
17.	The Location Template Approver can access transactions that require approval from the email notification or by navigating to the Worklist . For this example, the template transaction is accessed from the Worklist .
18.	Click the Worklist link. Worklist

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Step	Action
19.	The Worklist page displays all transactions that require action.
20.	Click the UC_RVCMP_SmartHRTemplate link.
	UC RVCMP SmartHRTemplate, 49953, UC RVCMP SHR Term Vol, 2016- 01-02, N. 0, UC TRANSACT ID:T000022456 EMPLID:10033264 EFFDT NOKEY:2018-11-01 BUSINESS UNIT:RVCMP RDC:RA.0,A,



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Initiator Comment							
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Multiple Approvers Vol Termination							
Return to Search 🔄 Notify							

Step	Action
21.	For template transactions that require approval, the SS Smart HR Transactions page appears. This page provides a link to the template transaction so the transaction can be reviewed in detail before approving.
22.	Click the Jose Merced link. Jose Merced



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Enter Transaction Details				
Name Jose Merced				
The following transaction details are required.				
Template Voluntary Termination				
Organizational Relationship Employee				
*Employee ID 10033264 × Q Jose Merced				
*Employment Record Number 0 (PROCUREMENT ANL 4)				
*Effective Date 11/01/2018				
Action Termination				
*Reason Code Resign - Moved out of Area				
Continue				

Step	Action
23.	Review the Transaction Details page, which identifies the employee's Name , the type of Template , the Organizational Relationship , the Employee ID , the Employment Record Number , the Effective Date , the Action and the Reason Code for the termination.
24.	Click the Continue button.



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AICK HEIE LU	Flide Fleader De	etalis				
emplate:	UC_VOL_TERM	Name: Action/Action Reason:	Jose Merced			
mployee ID:	10033264	Employee Record:	0 (PROCUREMENT ANL 4)			
Return to Enter	Transaction Details F	age				
Save ar	nd Submit	Save	Cancel			
ouro u	id Odbillit	ourc	ouncor			
Inh Data						
	- Deeltier Dete					
WORK LOCALL	on - Position Data					
POSI	uon number 40005	008				
Work Locatio	on - Job Fields					
B	usiness Unit RVCM	P	Department D01200			
Lo	cation Code P5487					
Job Informat	tion - United State	S				
Last [Date Worked 10/31/	2018				
Comments						
	Comments					
	17					
	لي					
Return to Enter	Transaction Details F	Page				

Step	Action
25.	The Location Approver reviews the information on the template transaction to ensure it is complete and accurate.
26.	Click the scroll bar.

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Position Nu	mber 40005608						
Work Location - Jo	b Fields						
Business	Unit RVCMP		Department D01200				
Location	Code P5487						
Job Information - U	nited States						
Last Date Wo	orked 10/31/2018						
Comments							
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Return to Enter Transac	tion Details Page						
Save and Submit	Save	Cancel	Supporting documents				
Transaction ID:	T000022456	_					
Initiator Comments:							
Requester ID:	10173879 Anitia Apptor						
Requested:	09/04/2018 3:36:37.000000PM						
/ol Termination	ı						
 Transact 	tion: T000022456, ID: 1003	264, Effd	t: 2018-11-01, Unit: RVCMP:Pendin	g			
Vol Termination				-			
Pending Multiple Ar	norovers 🖂						
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Step	Action
27.	When the review is complete, click the Cancel button to return to the approval page.
	Cancel

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Transaction Details								
Transaction ID T000022456		Transaction Sta	atus Pendir	ng				
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Name	Type of Hire	Start Date	Action	Country				
1 Jose Merced	Employee	11/01/2018	TER	USA				
Initiator Commont								
Requester ID 10173879 Anitia	Apptor							
Requested 00/04/10 2:26:27 000000	PM							
Requested 05/04/10 3.30.31.000000								
Approve		Deny						
Approver Comment								
Vol Termination								
Transaction: T0000	22456, ID: 1003	3264, Effdt: 20	18-11-01	, Unit: RVCMP:Pend	ling			
Vol Termination								
Pending								
Vol Termination								
Return to Search 🔚 Notify								

Step	Action	
28.	If the termination t	emplate is completed accurately, click the Approve button.
	Approve	



Smart HR Transactions						New Window Hel
Transaction Details						
Transaction ID T000022456		Transaction S	tatus Approv	ved		
Hire Details	Personalize	Find View All	a 🔣	First 🕘 1 of 1 🕑 Last		
Name	Type of Hire	Start Date	Action	Country		
1 Jose Merced	Employee	11/01/2018	TER	USA		
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Requester ID 10173879 Ar Requested 09/04/18 3:36:37.000 Approver Comment	iltia Apptor DOOPM					
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Requester ID 10173879 Ar Requested 09/04/18 3:36:37.000 Approver Comment	otopp 000PM 00022456, ID: 1003	13264, Effdt: 2	018-11-01	I, Unit: RVCMP:App	roved	
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Step	Action
29.	The transaction is approved.
30.	Click the Worklist link.
	Worklist



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Step	Action
31.	The approved template transaction is removed from the Worklist.





Step	Action
32.	The next task demonstrates how UCPC WFA Production processes the termination template transaction.

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	Effec	ctive Date	From 09/05/2018 🛐 To	11/04/2018	First Name				
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Transaction	ns to Process	s 🕐							
Cancel	Update	Send	Processor Name	Tem	plate Description	Effective Date	First Name	Last Nan	ne
				Voluntary Terminati	n	11/01/2018	<u>Jose</u>	Merced	
				Full Hire - Academic	Use Only	10/01/2018	Andrew	Kumah	
				Intra-Business Unit	Transfer - Academic Only	10/01/2018	Michael	Sinck	- 1
				Academic Concurre	nt Hire/Inter Location Transfer	10/01/2018	Aaron	Alvarado	
				Involuntary Termina	tion	10/01/2018	Kiera	Donogh	le
				Full Hire - Academic	Use Only	10/01/2018	Jennifer	Yang	
				Academic Concurre	nt Hire/Inter Location Transfer	10/01/2018	Saman	Banafti	~
<									>

Step	Action
33.	UCPC WFA Production uses the Manage Transactions page to access template transactions that have completed the Location approval process. WFA Production reviews the template transaction, reviews the applicable employee data components and saves the data to UCPath.
34.	To access the template transaction, click the employee's name. For this example, click the Jose link.



Favorites Main Menu Workforce Administration Smart HR Template	Manage Transactions		
	Home Worklist	Add to Favorites Sign	Out
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Manage Transactions			
Manage Transaction Details			
Name Jose Merced			
Template UC_VOL_TERM - Voluntary Termination			
Transaction Type Change Job Data			
Status Requested			
Organizational Relationship Employee			
Effective Date 11/01/2018 ×			
Action Termination			
Action Reason Resign - Moved out of Area			
Person Information			
Employee ID 10033264	Search for Matching Persons		
HR Status Active	Person Organizational Summary		
Complete Transaction			
Select this button to open the original template to complete the transaction.	Onen Template		
	open remplate		
Job Data			
Select this button to upload Job Data. You may view/update the data before saving it to the system.	Update Job Data		
Return to Manage Transactions			

Step	Action
35.	Click the Person Organizational Summary link to view the employee's organizational relationships and assignments. If the employee has multiple assignments, those jobs may need to be terminated as well. UCPC WFA Production will research and work with the Location to determine appropriate processing.
36.	Next, review the termination template.
	Click the Open Template button.
	Open Template



Favorites - Main Menu - Workforce Administration - Smart HR Template - Manage Transactions			
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Manage Transactions			
Manage Transaction Details			
Name Jose Merced			
The following transaction details are required.			
Template Voluntary Termination			
Organizational Relationship Employee			
*Employee ID 10033264 × Q Jose Merced			
*Employment Record Number 0 (PROCUREMENT ANL 4)			
Effective Date 11/01/2018			
Action Termination			
Reason Code Resign - Moved out of Area			
Continue			

Step	Action
37.	Review the Transaction Details page, which identifies the employee's Name , the type of Template , the Organizational Relationship , the Employee ID , the Employment Record Number , the Job Effective Date , the Action and the Reason Code for the termination.
38.	Click the Continue button.



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emplate: ffective Date: mployee ID:	UC_VOL_TERM 11/01/2018 10033264	Name: Action/Action Reason: Employee Record:	Jose Merced TER/MOA (Resign - Moved out of Area) 0 (PROCUREMENT ANL 4)		
eturn to Enter	Transaction Details Pag	16			
Save a	nd Submit	Save	Cancel		
Job Data					
Work Locati	on - Position Data				
Posi	tion Number 4000560	8			
Work Locati	on - Job Fields				
В	usiness Unit RVCMP		Department D01200		
Lo	ocation Code P5487				
Job Informat	tion - United States				
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Job Informat Last	Comments	118			
Job Informat Last Comments Return to Enter	tion - United States Date Worked 10/31/20 Comments	918 99			

Step	Action
39.	This page displays the template in view-only format. UCPC WFA Production reviews each field of the template.
40.	When the template review is complete, return to the Transaction Details page to begin processing the transaction. Click the Cancel button.



Favorites -	Main Menu -	 Workforce Administration - 	Smart HR Template 🗸 🔿	Manage Transactions			
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-	Name	Jose Merced					
	Template	UC_VOL_TERM - Voluntary Termination					
Tra	nsaction Type	Change Job Data					
	Status I	Requested					
Organizationa	I Relationship	Employee					
	Effective Date	11/01/2018					
	Action	Termination					
	Action Reason	Resign - Moved out of Area					
Person Infe	ormation						
	Employee ID	10033264		Search for Matching	Persons		
	HR Status	Active		Person Organization:	al Summary		
Complete	Transaction						
Select this b	utton to open the	original template to complete the transac	tion.	Open Temp	late		
Job Data							
Select this b	utton to upload Jo	ob Data. You may view/update the data b	efore saving it to the system.	Update Job I	Data		
Return to Man	age Transactions	s					

Step	Action				
41.	Finally, review the staged employee information and save the updated Job Data to the UCPath tables.				
42.	Click the Update Job Data button.				
	Update Job Data				



Work Location Job Information Job Labor Payroll Statary Plan Compensation U.C. Job Data Jose Merced Employee Empl ID 10033264 Employee Empl Record 0 Work Location Image: Compensation U.C. Job Data *Effective Bate 11/01/2018 Image: Compensation Image: Compensation *Effective Sequence 0 *Action Image: Compensation Image: Compensation Payroll Status Termination Image: Compensation Image: Compensation Image: Compensation Payroll Status Termination Image: Compensation Image: Compensation Image: Compensation Image: Compensation Payroll Status Termination Image: Compensation Image: Compensation Image: Compensation Image: Compensation Position Number 0005603 PROCUREMENT ANL 4 Image: Compensation Im	DRACLE'							Home W		A ravontes	sign Ou
Businessi Empland 1003324 Employee Find First 1013 test *Effective Date 1101/2018 ** Go To Row *Effective Sequence 0 *Action Termination ** Payroll Status Inactive Reason Resign-Moved out of Area Payroll Status Terminated *Job Indicator Primary Job • Position Number 0005608 PROCUREMENT ANL 4 • Override Position Data • Position Number 0005608 PROCUREMENT ANL 4 • Override Position Data • Position Number 0005608 PROCUREMENT ANL 4 • Override Position Data • Position Entry Date 08/01/2018 • • Position Management Record • Regulatory Region USA UD 2000 Plant Administration Department Entry Date 08/01/2018 • Last Start Date 08/01/2018 CoRP A Establishment ID UCR UC Riverside Campus Last Start Date 08/01/2018 Termination Date 10/31/2018 Last Start Date 08/01/2018 Termination Date 10/31/2018 Last Date Worked ID/31/2018 Last Date Worked ID/31/2018 <th>Vork Location Job Information</th> <th>Job Labor</th> <th>Payroll</th> <th>Salary Plan</th> <th><u>C</u>ompensation</th> <th>UC Job</th> <th>Data</th> <th></th> <th></th> <th>New Window </th> <th>Help 📖</th>	Vork Location Job Information	Job Labor	Payroll	Salary Plan	<u>C</u> ompensation	UC Job	Data			New Window	Help 📖
Work Location (*) Find First (*) 1 of 3 (*) Last *Effective Date 11/01/2018 * # Go To Row (*) Effective Sequence 0 *'Action Termination (*) HR Status Inactive Reason Reason Reason (*) Payroll Status Terminated *'Job Indicator (*) (*) (*) Position Number 60055008 (*) PROCUREMENT ANL 4 (*) (*) Position Entry Date 601/2018 (*) (*) (*) (*) (*) Position Entry Date 0005508 (*) PROCUREMENT ANL 4 (*) (*) (*) Position Entry Date 6001/2018 (*)	Jose Merced mployee			Empl	EmplID 10033264 Record 0						
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Department D01/200 Plant Administration Department Entry Date 08/01/2018 UC Location P5487 CORP A Establishment ID UCR UC Riverside Date Created Last Start Date 08/01/2018 Termination Date 10/31/2018 Last Date Worked 10/31/2018 Override Last Date Worked Job Data Employment Data Earnings Distribution Benefits Program Participation	Business Unit	RVCMP		UC Rive	erside Campus						
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	Job Data Emp	loyment Data		Earr	ings Distribution		Bene	fits Program Pa	rticipation		

Step	Action
43.	Review the information added to the employee's Job Data before saving the information to the component tables.
44.	Review the Effective Date , Action and Action Reason to ensure they copied from the template accurately.
45.	Review the Last Date Worked , which is typically one day prior to the effective date of the termination.
46.	Click the scroll bar.



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ORACLE						
Jose Merced		Empl ID 10033264				
Employee		Empl Record 0				-
Work Location (2)				Find First	🐠 1 of 3 🕑 Last	
*Effective Date	11/01/2018			Go	To Row + -	
Effective Sequence	0		*Action Termination		~	
HR Status	Inactive		Reason Resign - Moved ou	ut of Area	~	
Payroll Status	Terminated	*Job	Indicator Primary Job		~	
				Future		
Position Number	40005608	PROCUREMENT ANL 4				
	Override Position Data					
Position Entry Date	08/01/2018					
	Position Management Red	cord				
Regulatory Region	USA	United States				
Company	UCS	University of California				
Business Unit	RVCMP	UC Riverside Campus				
Department	D01200	Plant Administration				
Department Entry Date	08/01/2018					
Location	P5487	CORP A				
Establishment ID	UCR	UC Riverside	Date	e Created 09/04/2018		
Last Start Date	08/01/2018	Termination Date	10/31/2018			
Expected Job End Date	Ē	End Job Automatically				
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Vork Eucation Job Information Job La	abor Payron Salary Plan Cor	npensation UC Job Data				
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Step	Action
47.	Click the OK button to save the termination row in Job Data .
	ОК

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ORACLE			
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Manage Transactions			
Manage Transactio	n Details		
Name	Jose Merced		
Template	UC_VOL_TERM - Voluntary Termination		
Transaction Type	Change Job Data	View Template	
Status	Completed		
Organizational Relationship	Employee		
Effective Date	11/01/2018		
Action	Termination		
Action Reason	Resign - Moved out of Area		
Person Information			
Employee ID	10033264		
HR Status	Active	Person Organizational Summary	
Job Data			
Select this link to view Job Data that was successfully uploaded to the system.		View/Edit Job Data	
Return to Manage Transactions			



Step	Action
48.	The employee termination has been processed into UCPath.
49.	You have viewed a simulation of how to initiate, approve and process a termination template transaction in UCPath for Jose Merced. End of Procedure.