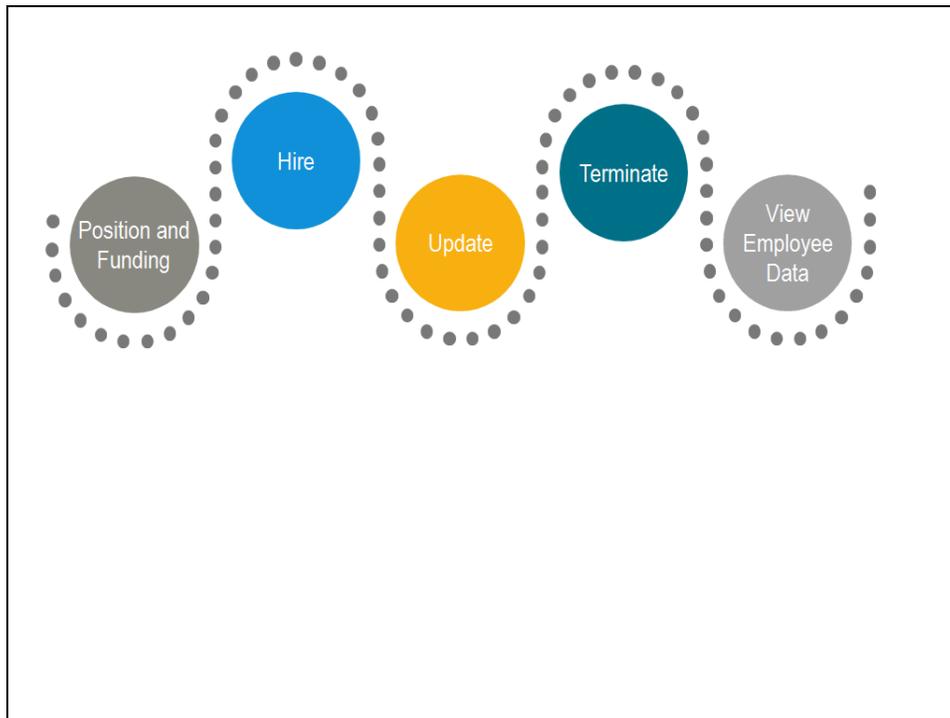
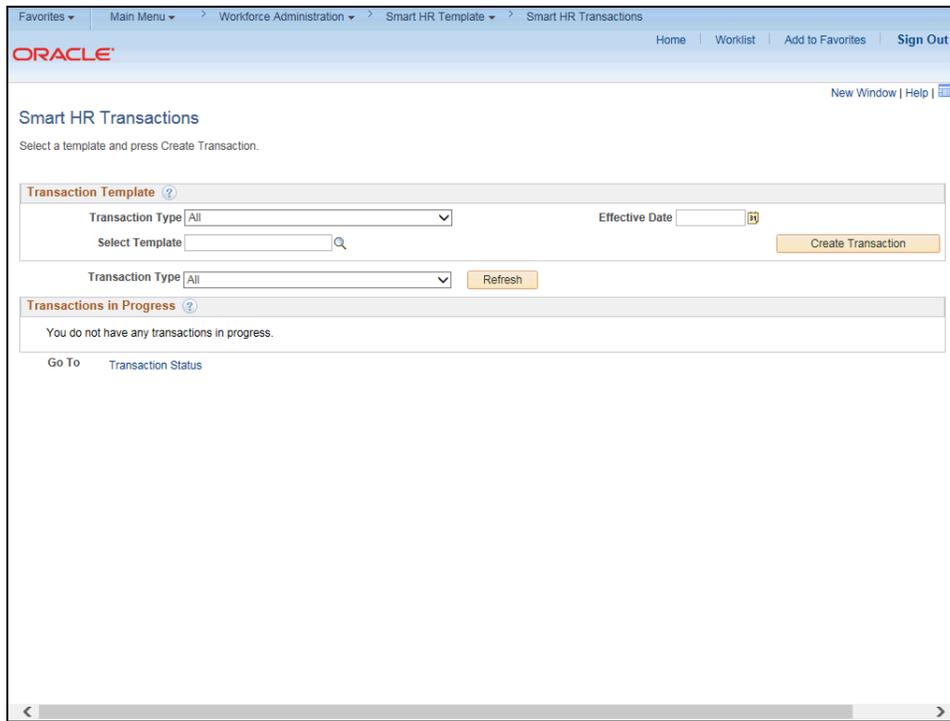


This simulation provides an overview of how to initiate, approve and process a termination template transaction in UCPath for Jose Merced.

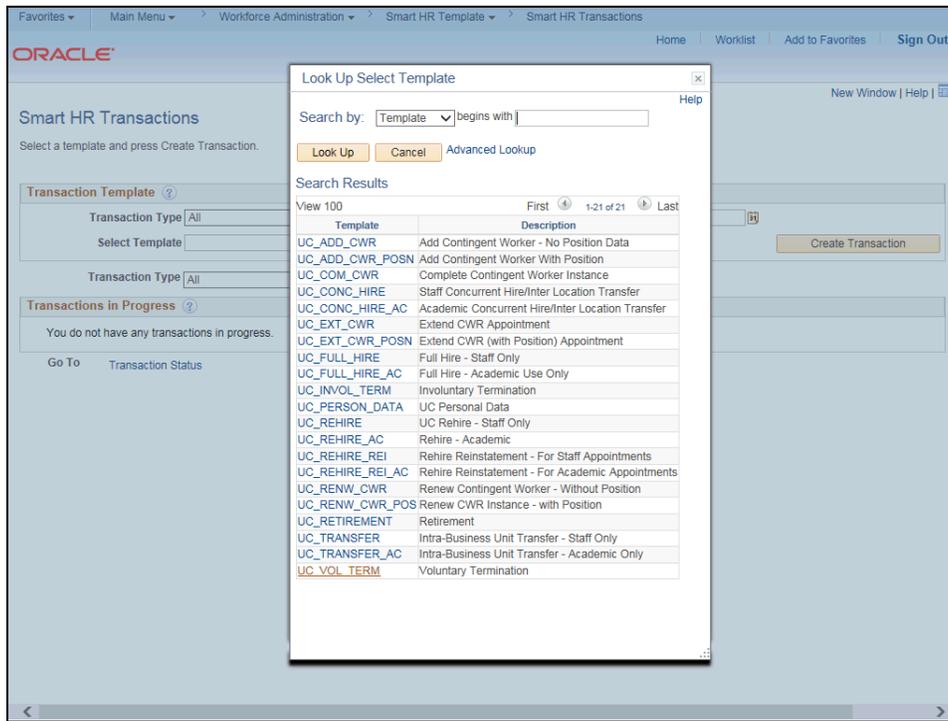
This simulation is for informational purposes only. The tasks included in this simulation are performed by those with the appropriate UCPath security role.



Step	Action
1.	The following tasks are covered in this demonstration: <ul style="list-style-type: none"> <li>- Initiate a termination template (Location Template Initiator).</li> <li>- Approve a termination template (Location Template Approver).</li> <li>- Process a termination template (UCPC WFA Production).</li> </ul>



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



Step	Action
4.	<p>Select the appropriate termination template. Notice there are two termination templates, one for voluntary termination and one for involuntary termination.</p> <p>This example uses the <b>UC_VOL_TERM</b> template.</p> <p><u>UC VOL TERM</u></p>

Step	Action
5.	Click in the <b>Effective Date</b> field. <input type="text"/>
6.	Enter the desired information into the <b>Effective Date</b> field. For this example, enter <b>11/1/2018</b> .
7.	Click the <b>Create Transaction</b> button. <input type="button" value="Create Transaction"/>

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

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

Smart HR Transactions  
Enter Transaction Details

The following transaction details are required.

Template Voluntary Termination

Organizational Relationship Employee

\*Employee ID 10033264  Jose Merced

\*Employment Record Number 0 (PROCUREMENT ANL 4)

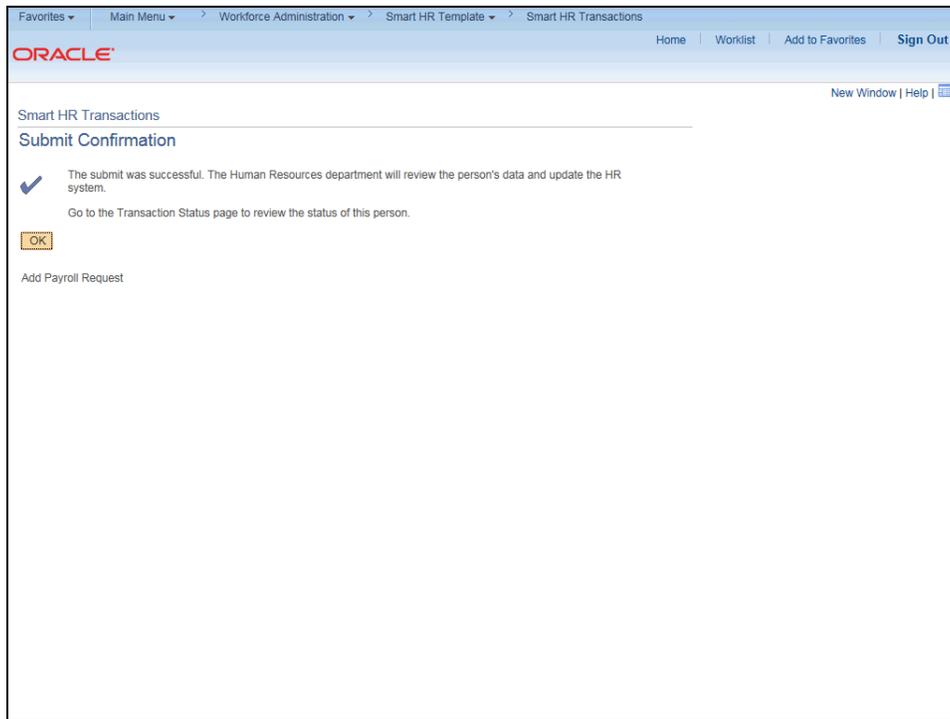
\*Effective Date 11/01/2018

Action Termination

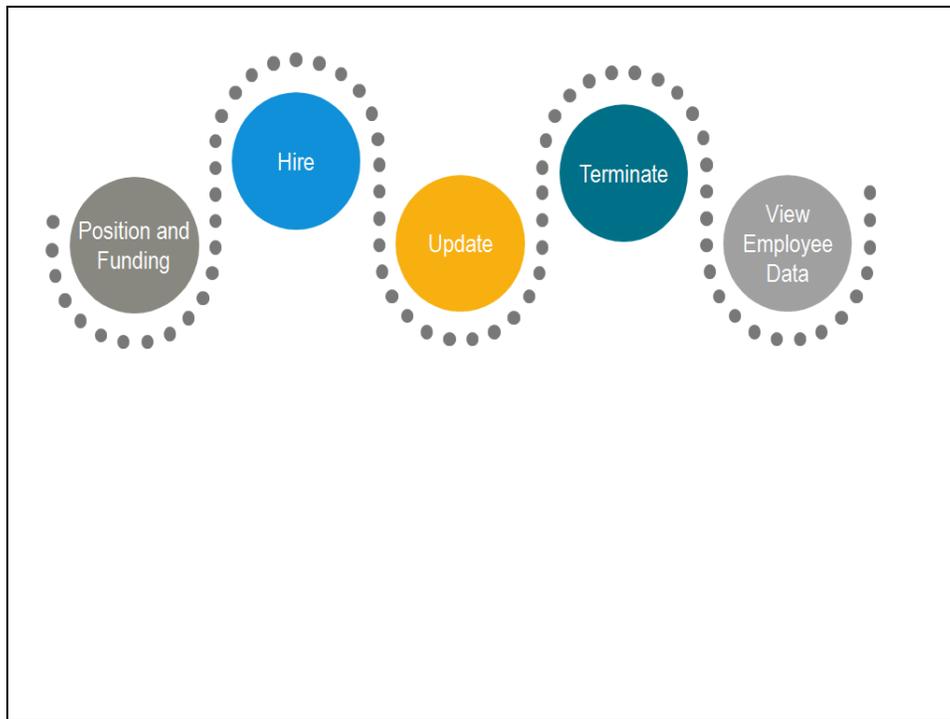
\*Reason Code Resign - Moved out of Area

Step	Action
9.	Select the appropriate <b>Employment Record Number</b> if the employee has multiple jobs. Then enter the termination <b>Effective Date</b> and <b>Reason Code</b> .
10.	Click the <b>Continue</b> button. 

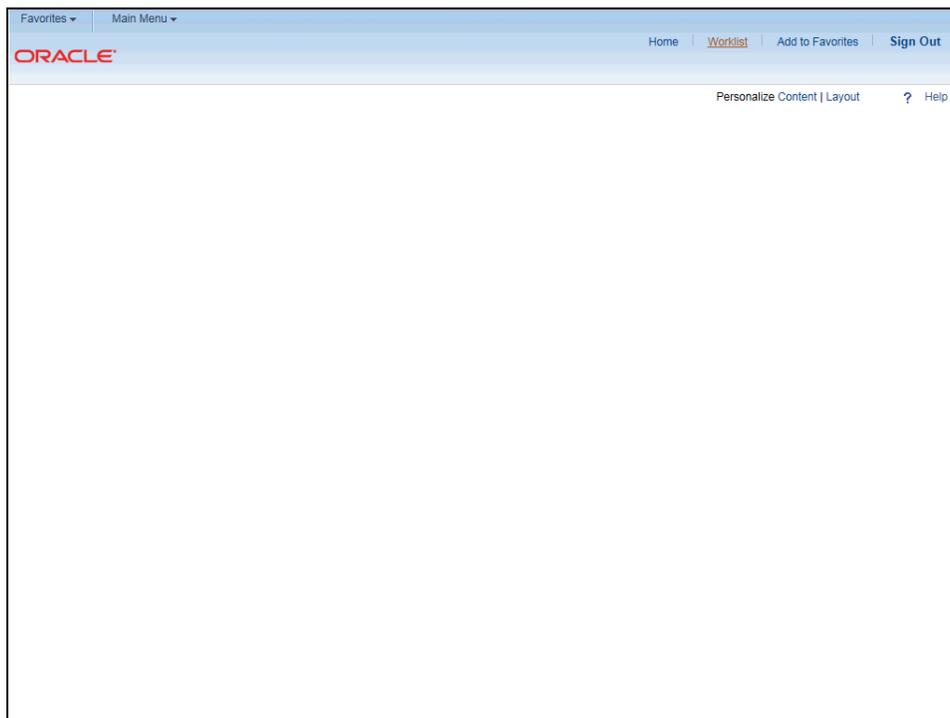
Step	Action
11.	The termination template appears with the employee's <b>Position Number, Business Unit, Department, Location Code</b> and <b>Last Date Worked</b> .  <b>Note:</b> The <b>Last Date Worked</b> field is automatically populated with a date that is one day prior to the <b>Effective Date</b> that was entered. This field can be updated if necessary. Changing the <b>Last Date Worked</b> does not change the <b>Effective Date</b> ; however, the <b>Last Date Worked</b> must be prior to the <b>Effective Date</b> .
12.	Enter comments for the termination transaction, if needed.
13.	Click the <b>Save and Submit</b> button. 



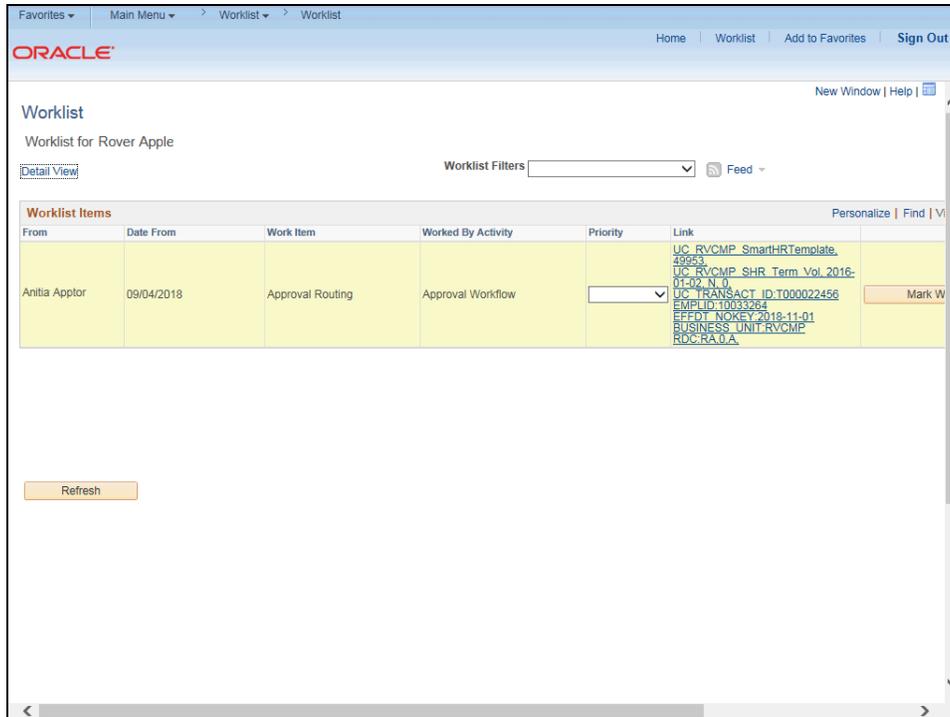
Step	Action
14.	Click the <b>OK</b> button. 
15.	The template transaction is routed for approval and appears in the <b>Transactions in Progress</b> section until it is approved.



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 <b>Worklist</b> . For this example, the template transaction is accessed from the <b>Worklist</b> .
18.	Click the <b>Worklist</b> link. <a href="#">Worklist</a>



Step	Action
19.	The <b>Worklist</b> page displays all transactions that require action.
20.	Click the <b>UC_RVCMP_SmartHRTemplate</b> link. <a href="#">UC_RVCMP_SmartHRTemplate_49953</a> <a href="#">UC_RVCMP_SHR_Term_Vol_2016-01-02_N_0</a> <a href="#">UC_TRANSACT_ID:T000022456</a> <a href="#">EMPLID:10033264</a> <a href="#">EFFDT:NOKEY:2018-11-01</a> <a href="#">BUSINESS_UNIT:RVCMP</a> <a href="#">RDC:RA.0.A</a>

Transaction ID T000022456      Transaction Status Pending

Name	Type of Hire	Start Date	Action	Country
1 <a href="#">Jose Merced</a>	Employee	11/01/2018	TER	USA

Requester ID 10173879      Anita Apptor  
Requested 09/04/18 3:36:37.000000PM

Buttons:

Vol Termination: Transaction: T000022456, ID: 10033264, Effdt: 2018-11-01, Unit: RVCMP:Pending

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

The screenshot shows the Oracle UCPath interface for entering transaction details. The breadcrumb trail is: Favorites > Main Menu > Worklist > Worklist > SS Smart HR Transactions. The page title is 'Smart HR Transactions' and the sub-header is 'Enter Transaction Details'. The Oracle logo is in the top left, and navigation links (Home, Worklist, Add to Favorites, Sign Out) are in the top right. A 'New Window | Help |' link is also present.

The form displays the following information:

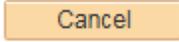
- Name:** Jose Merced
- Template:** Voluntary Termination
- Organizational Relationship:** Employee
- \*Employee ID:** 10033264 (with a search icon and 'Jose Merced' text)
- \*Employment Record Number:** 0 (PROCUREMENT ANL 4)
- \*Effective Date:** 11/01/2018
- Action:** Termination
- \*Reason Code:** Resign - Moved out of Area

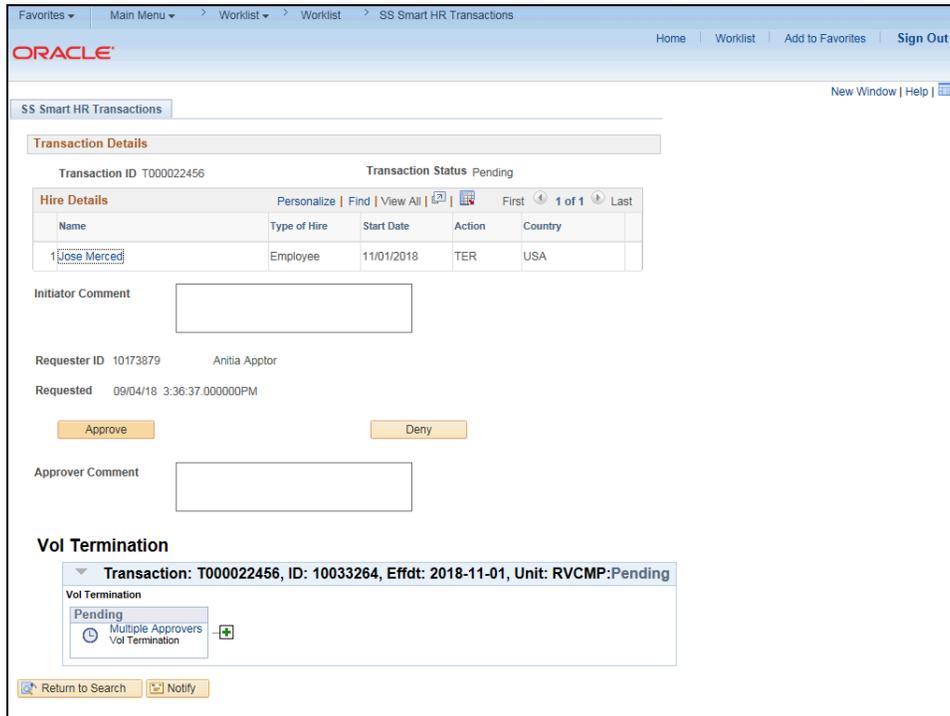
At the bottom of the form are two buttons: 'Continue' and 'Cancel'.

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

UCPath Task:  
Employee Lifecycle - Initiate, Approve and  
Process Termination Template Transaction

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.

Step	Action
27.	When the review is complete, click the <b>Cancel</b> button to return to the approval page. 



The screenshot shows the Oracle UCPath interface for a pending transaction. The transaction ID is T000022456 and the status is Pending. The employee details are as follows:

Name	Type of Hire	Start Date	Action	Country
1 Jose Merced	Employee	11/01/2018	TER	USA

Additional details include: Initiator Comment (empty), Requester ID 10173879 (Anilia Apptor), Requested 09/04/18 3:36:37.000000PM, and Approver Comment (empty). The interface includes buttons for 'Approve' and 'Deny'. A 'Vol Termination' section shows a dropdown menu with options: Pending, Multiple Approvers, and Vol Termination.

Step	Action
28.	If the termination template is completed accurately, click the <b>Approve</b> button. 

SS Smart HR Transactions

Transaction ID T000022456      Transaction Status Approved

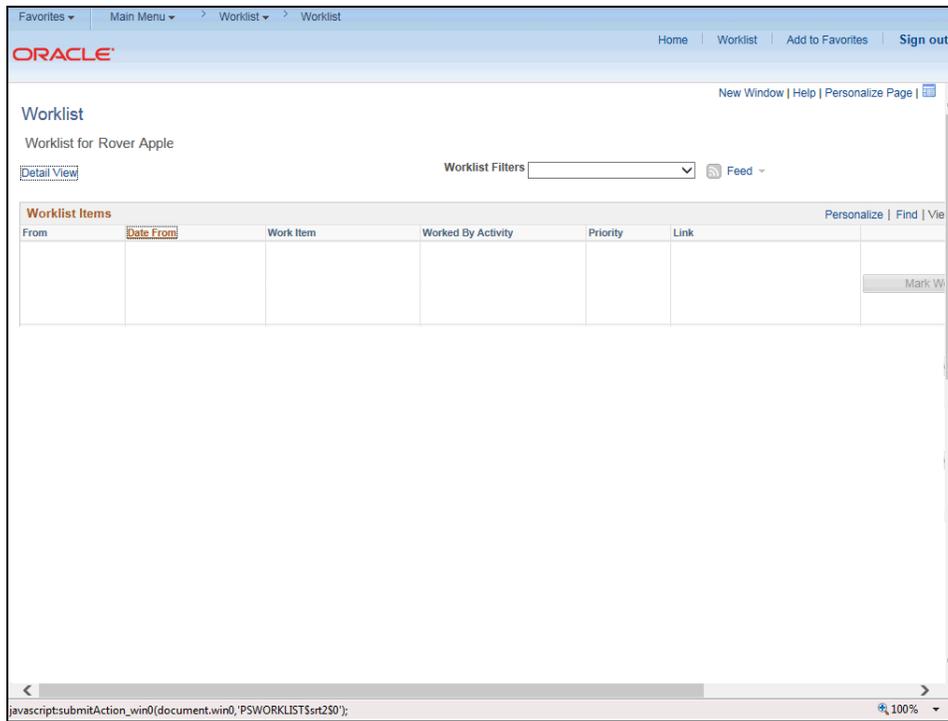
Name	Type of Hire	Start Date	Action	Country
1 Jose Merced	Employee	11/01/2018	TER	USA

Requester ID 10173879      Anita Apptor

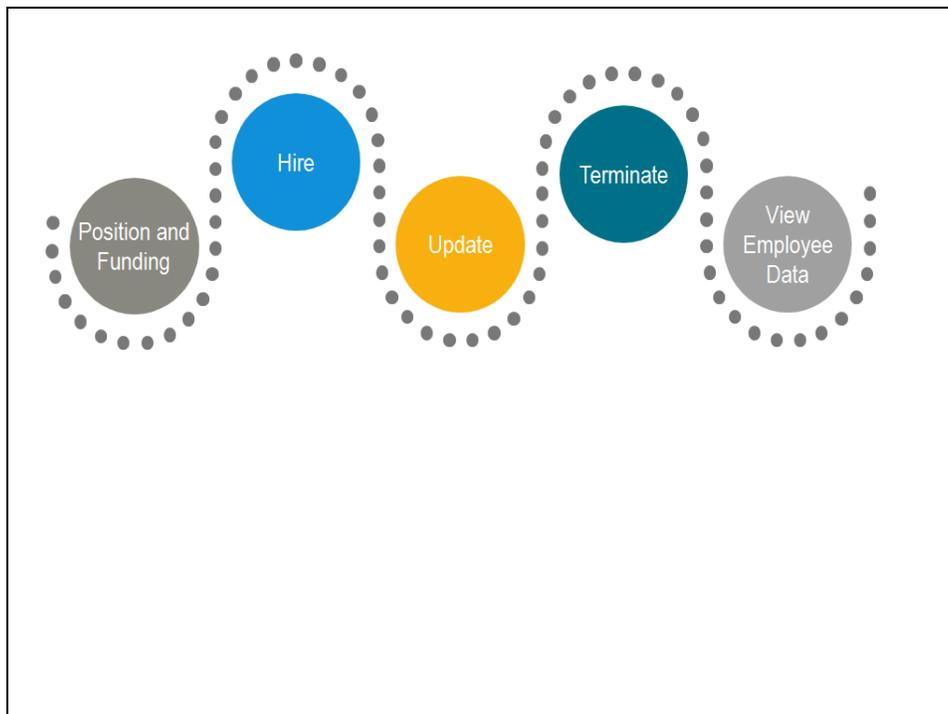
Requested 09/04/18 3:36:37.000000PM

Vol Termination  
Transaction: T000022456, ID: 10033264, Effdt: 2018-11-01, Unit: RVCMP:Approved

Step	Action
29.	The transaction is approved.
30.	Click the <b>Worklist</b> link. <a href="#">Worklist</a>



Step	Action
31.	The approved template transaction is removed from the <b>Worklist</b> .



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

Manage Transactions

The following people have transactions ready to be processed.

\*Transaction Type: All Business Unit: [ ]  
 \*Transaction Status: All Empl ID: [ ]  
 Effective Date From: 09/05/2018 To: 11/04/2018 First Name: [ ]  
 Last Name: [ ] Processor ID: [ ]

Refresh

Cancel	Update	Send	Processor Name	Template Description	Effective Date	First Name	Last Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Voluntary Termination	11/01/2018	Jose	Merced
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Full Hire - Academic Use Only	10/01/2018	Andrew	Kumah
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Intra-Business Unit Transfer - Academic Only	10/01/2018	Michael	Sinck
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Academic Concurrent Hire/Inter Location Transfer	10/01/2018	Aaron	Alvarado
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Involuntary Termination	10/01/2018	Kiera	Donoghue
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Full Hire - Academic Use Only	10/01/2018	Jennifer	Yang
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Academic Concurrent Hire/Inter Location Transfer	10/01/2018	Saman	Banafti

Step	Action
33.	UCPC WFA Production uses the <b>Manage Transactions</b> 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 <b>Jose</b> link.

The screenshot shows the Oracle UCPath interface for 'Manage Transaction Details'. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Smart HR Template > Manage Transactions. The page title is 'Manage Transactions' and 'Manage Transaction Details'. The transaction details are as follows:

- 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

Below the details are three sections:

- Person Information:** Shows Employee ID 10033264 and HR Status Active. It includes links for 'Search for Matching Persons' and 'Person Organizational Summary'.
- Complete Transaction:** Contains the instruction 'Select this button to open the original template to complete the transaction.' and an 'Open Template' button.
- Job Data:** Contains the instruction 'Select this button to upload Job Data. You may view/update the data before saving it to the system.' and an 'Update Job Data' button.

A 'Return to Manage Transactions' link is located at the bottom of the page.

Step	Action
35.	Click the <b>Person Organizational Summary</b> 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 <b>Open Template</b> button.  <div style="text-align: center;">  </div>

The screenshot shows the Oracle Manage Transactions interface. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Smart HR Template > Manage Transactions. The page title is "Manage Transactions" and "Manage Transaction Details". The details for the transaction are as follows:

- Name: Jose Merced
- Template: Voluntary Termination
- Organizational Relationship: Employee
- \*Employee ID: 10033264 (with a search icon and "Jose Merced" text)
- \*Employment Record Number: 0 (PROCUREMENT ANL 4)
- Effective Date: 11/01/2018
- Action: Termination
- Reason Code: Resign - Moved out of Area

At the bottom of the form, there are two buttons: "Continue" and "Cancel".

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

Manage Transactions  
Manage Transaction Details

Click here to Hide Header Details

Template: UC\_VOL\_TERM    Name: Jose Merced  
 Effective Date: 11/01/2018    Action/Action Reason: TER/MOA (Resign - Moved out of Area)  
 Employee ID: 10033264    Employee Record: 0 (PROCUREMENT ANL 4)

[Return to Enter Transaction Details Page](#)

Save and Submit    Save    Cancel

**Job Data**

**Work Location - Position Data**  
 Position Number 40005608

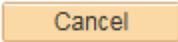
**Work Location - Job Fields**  
 Business Unit RVCMP    Department D01200  
 Location Code P5487

**Job Information - United States**  
 Last Date Worked 10/31/2018

**Comments**  
 Comments

[Return to Enter Transaction Details Page](#)

Save and Submit    Save    Cancel    Supporting documents

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 <b>Transaction Details</b> page to begin processing the transaction.  Click the <b>Cancel</b> button.  <div style="text-align: center;">  </div>

Favorites ▾ Main Menu ▾ Workforce Administration ▾ Smart HR Template ▾ Manage Transactions

ORACLE Home Worklist Add to Favorites Sign Out

Manage Transactions New Window | Help |

### 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.

**Job Data**

Select this button to upload Job Data. You may view/update the data before saving it to the system.

[Return to Manage Transactions](#)

Step	Action
41.	Finally, review the staged employee information and save the updated <b>Job Data</b> to the UCPath tables.
42.	Click the <b>Update Job Data</b> button. <div style="text-align: center;"><input type="button" value="Update Job Data"/></div>

The screenshot shows the Oracle UCPath interface for the 'Work Location' form. The employee name is Jose Merced, with Empl ID 10033264 and Empl Record 0. The form is currently displaying the 'Work Location' tab. Key fields include:
 

- Effective Date:** 11/01/2018
- Effective Sequence:** 0
- HR Status:** Inactive
- Payroll Status:** Terminated
- Action:** Termination
- Reason:** Resign - Moved out of Area
- \*Job Indicator:** Primary Job
- Position Number:** 40005608 (PROCUREMENT ANL 4)
- Position Entry Date:** 08/01/2018
- 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 Created:** 09/04/2018
- Last Start Date:** 08/01/2018
- Termination Date:** 10/31/2018
- Expected Job End Date:** (empty)
- Last Date Worked:** 10/31/2018

 At the bottom, there are tabs for Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation.

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

UCPath Task:  
Employee Lifecycle - Initiate, Approve and  
Process Termination Template Transaction

**Work Location** (Employee: Jose Merced, Empl ID: 10033264, Empl Record: 0)

**Effective Date:** 11/01/2018  
**Effective Sequence:** 0  
**HR Status:** Inactive  
**Payroll Status:** Terminated

**Action:** Termination  
**Reason:** Resign - Moved out of Area  
**Job Indicator:** Primary Job

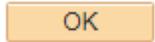
**Position Number:** 40005608 (PROCUREMENT ANL 4)  
**Position Entry Date:** 08/01/2018  
**Regulatory Region:** USA (United States)  
**Company:** UCS (University of California)  
**Business Unit:** RVCMP (UC Riverside Campus)  
**Department:** D01200 (Plant Administration)  
**Department Entry Date:** 08/01/2018  
**Location:** P5487 (CORP A)  
**Establishment ID:** UCR (UC Riverside)  
**Date Created:** 09/04/2018

**Last Start Date:** 08/01/2018  
**Expected Job End Date:** [blank]  
**Last Date Worked:** 10/31/2018  
**Termination Date:** 10/31/2018  
 End Job Automatically  
 Override Last Date Worked

**Job Data | Employment Data | Earnings Distribution | Benefits Program Participation**

Buttons: OK, Cancel, Apply, Refre

Step	Action
47.	Click the <b>OK</b> button to save the termination row in <b>Job Data</b> .



**Manage Transaction Details** (Employee: Jose Merced)

**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. <b>End of Procedure.</b>