

Use this task to view the status of **Smart HR Template** transactions and **TAM Prepare for Hire** transactions that have completed Location AWE and have moved into UCPC WFA Production's queue. You can view all transactions submitted within the department(s) to which you have access.

This page displays transactions that are pending, processed, or cancelled by WFA Production. This page also displays template transactions that have been denied by a Location Approver.

Navigation:

Menu > Workforce Administration > Smart HR Template > Smart HR Transaction Status OR

Workforce Administration (Homepage) > HR Tasks (Tile) > Smart HR Templates > Smart HR Transaction Status

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| Transaction Stat | tus | | | | | | | | |
| The following transaction | ns are pending, cancel | ed or have been process | ed by Human | Resources. | | | | | |
| HR Review Status | s All | ~ | Bus | iness Unit | ٩ | | | | |
| Transaction Type | e All | ~ | | Empl ID | | | | | |
| Transaction Status | s _{All} | ~ | | First Name | | | | | |
| Start Date From | n 08/27/2018 🛐 | To 09/16/2018 | | Last Name | | | | | |
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| Transaction Status | (?) | | | | | | | | Personalize Fin |
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| Template | Effective Date | Transaction Status | Person ID | Empl Record | Action | | Business Unit | First Name | Last Name |
| Template UC_FULL_HIRE | Effective Date 08/27/2018 | Transaction Status Hired/Added | Person ID 10032642 | Empl Record | Action Hire | | Business Unit | First Name Jason | Last Name Straub |
| Template UC_FULL_HIRE UC_FULL_HIRE | Effective Date 08/27/2018 08/27/2018 | Transaction Status Hired/Added Cancel | Person ID 10032642 NEW | Empl Record | Action Hire Hire | Clone | Business Unit UCOP1 UCOP1 | First Name Jason John | Last Name Straub Dea |
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| Step | Action |
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| 1. | Use the Transaction Status page to view the status of the template and TAM transactions as well as other summary transaction information. |
| | The default filters are set to All with a Start Date From that is 10 days prior to the current date and a To date that is 10 days after the current date. |
| 2. | To view only TAM Prepare for Hire transactions, select RecruitingHire/Rehire/Transfer from the Transaction Type drop-down list. |
| 3. | The Download button allows you to export the transaction grid information into an Excel spreadsheet, including any comments entered by WFA Production. |



| Step | Action |
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| 4. | The Transaction Status grid displays the transactions that match the filters. |
| 5. | The Template column identifies the template that was initiated. This column displayed RECRUITING for TAM transactions. |
| 6. | The Effective Date column identifies the effective date entered on the transaction. |
| 7. | The values you might see in the Transaction Status column include: |
| | • Requested: Transaction was submitted but not yet processed by WFA Production. |
| | Completed: Transaction was processed by WFA Production. Hired/Added: Hire, Rehire or Concurrent Hire was processed by WFA Production |
| | • Cancel: Transaction was cancelled by WFA Production. |
| | • Denied: Transaction was denied by Location Approver. (Displays for template transactions only.) |
| 8. | The Person ID column identifies the employee associated with the transaction. |
| | This column displays NEW for hire transactions that are pending or cancelled. After the hire transaction is processed by UCPC the new employee ID displays. |
| 9. | The Empl Record column identifies the employee job record to which the transaction applies. |
| 10. | The Action column displays the action code for the transaction. |
| 11. | The Clone button appears when: - A template transaction was denied by a Location Approver. Locations can refer to the SS Smart HR Transactions page to view comments from the Approver about the denied transaction. - A template transaction was cancelled by WEA Production Refer to the Reason |
| | for Cancellation column on this page to view comments from WFA Production about the cancelled transaction. |
| | Note: TAM transactions do not use the Clone functionality. If WFA Production cancels a TAM transaction, an email notification is sent to the Location Recruiter and includes the reason for the cancellation. Locations must withdraw the TAM transaction in the Recruiting module, update and then resubmit. |
| 12. | The Business Unit column identifies the employee's business unit. |
| 13. | The Name columns identify the employee associated with the transaction. |
| 14. | For this example, update the HR Review Status to display all Cancelled transactions. |
| | Click the button to the right of the HR Review Status field. |



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| e following transactions | are pending, cancel | ed or have been process | ed by Human | Resources. | | | | | |
| HR Review Status | All | ~ | Bus | iness Unit | Q | | | | |
| Transaction Type | All | | | Empl ID | | | | | |
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| emplate | Effective Date | Transaction Status | Person ID | Empl Record | Action | | Business Unit | First Name | Last Name |
| C_FULL_HIRE | 08/27/2018 | Hired/Added | 10032642 | 0 | Hire | | UCOP1 | Jason | Straub |
| C_FULL_HIRE | 08/27/2018 | Cancel | NEW | | Hire | Clone | UCOP1 | John | Dea |
| C_FULL_HIRE | 08/27/2018 | Hired/Added | 10032820 | 0 | Hire | | UCOP1 | John | Martinez |
| C_FULL_HIRE | 08/27/2018 | Hired/Added | 10032700 | 0 | Hire | | UCOP1 | Edwin | Legarda |
| | 08/27/2018 | Hired/Added | 10032973 | 0 | Hire | | UCOP1 | Leila | Farley |
| JC_FULL_HIRE | | Hired/Added | 10033086 | 0 | Add CWR | | UCOP1 | Eric | Wells |
| IC_FULL_HIRE | 08/27/2018 | | | | Add CWR | | UCOP1 | Jonathan | Timoszyk |
| IC_ADD_CWR | 08/27/2018 | Hired/Added | 10033087 | 1 | Add Office | | | | |
| JC_FULL_HIRE JC_ADD_CWR JC_ADD_CWR JC_ADD_CWR | 08/27/2018 08/27/2018 08/27/2018 | Hired/Added Hired/Added | 10033087 | 0 | Add CWR | | UCOP1 | Elizabeth | McDonald |
| UC_FULL_HIRE UC_ADD_CWR UC_ADD_CWR UC_ADD_CWR | 08/27/2018 08/27/2018 08/27/2018 08/27/2018 | Hired/Added | 10033087 10033085 | 0 | Add CWR | | UCOP1 | Elizabeth | McDonald |

| Step | Action | | | | | |
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| 15. | Click the Cancelled list item. | | | | | |
| | Cancelled | | | | | |
| 16. | Click the Refresh button. | | | | | |



| e following transactions ar | e pending, cancele | ed or have been process | ed by Human | Resources. | | | | | |
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| Transaction Status A | 1 | ✓ | 1 | First Name | | | | | |
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| ransaction Status 🕐 | | | | | | | | | Personalize |
| mplate | Effective Date | Transaction Status | Person ID | Empl Record | Action | | Business Unit | First Name | Last Name |
| _FULL_HIRE | 08/27/2018 | Cancel | NEW | | Hire | Clone | UCOP1 | John | Dea |
| tao to Smart HR | Transactorio | | | | | | | | |

| Step | Action |
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| 17. | The filter displays only one template transaction that has been cancelled within the dates indicated. |
| 18. | Click the scroll bar. |

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| ending, can | celed or have b | een processed by H | uman Resou | irces. | | | | | | | |
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| | Effective Date | Transaction Status | Person ID | Empl Record | Action | | Business Unit | First Name | Last Name | Reason for Cancellation | View Email Text |
| | 08/27/2018 | Cancel | NEW | | Hire | Clone | UCOP1 | John | Dea | View Comments | |
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| Step | Action |
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| 19. | In some cases, WFA Production may need to cancel a template transaction. When a transaction in cancelled, WFA Production enters a comment to explain why the transaction was cancelled. Template Initiators can View Comments and, if needed, Clone the template transaction to resubmit it with necessary corrections. Note: To view comments about a template transaction that was denied by a Location Approver you must navigate to the SS Smart HR Transactions page. |
| | Note: To view comments about a TAM transaction that was cancelled by WFA Production you must refer to the email notification. |
| 20. | The View Email Text column displays a View link if WFA Production sent an email to the Location Template Initiator about a template transaction. Note: This functionality is not used for TAM transactions. |
| 21. | Click the scroll bar. |

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| Transaction Status | | | | | | | | | | |
| The following transactions are | pending, cancel | ed or have been processe | d by Human F | Resources. | | | | | | |
| HR Review Status Car | ncelled | ~ | Busin | ness Unit | Q | | | | | |
| Transaction Type All | | ~ | | Empl ID | | | | | | |
| Transaction Status All | | ~ | Fi | irst Name | | | | | | |
| Start Date From 08/2 | 27/2018 | To 09/16/2018 | L | ast Name | | | | | | |
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| Transaction Status (2) | | | | | | | | | Personalize F | ind |
| Template | Effective Date | Transaction Status | Person ID | Empl Record | Action | | Business Unit | First Name | Last Name | |
| UC_FULL_HIRE | 08/27/2018 | Cancel | NEW | | Hire | Clone | UCOP1 | John | Dea | |
| Go To Smart HR T | ransactions | | | | | | | | | |
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| 22. | For the next example, update the HR Review Status to display Processed transactions. |
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| Step | Action |
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| 23. | Click the Processed list item. |
| | Processed |
| 24. | Click the Refresh button. |
| | Refresh |

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| The following transaction | is are pending, cancel | ed or have been process | ed by Humar | 1 Resources. | | | | |
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| Transaction Statu | IS All | ~ | | First Name | | | | |
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| Transaction Status | ? | | | | | I | Personalize Fin | d View All 💷 📑 🛛 First |
| Template | Effective Date | Transaction Status | Person ID | Empl Record | Action | Business Unit | First Name | Last Name |
| UC_FULL_HIRE | 08/27/2018 | Hired/Added | 10032642 | 0 | Hire | UCOP1 | Jason | Straub |
| UC_FULL_HIRE | 08/27/2018 | Hired/Added | 10032820 | 0 | Hire | UCOP1 | John | Dea |
| UC_FULL_HIRE | 08/27/2018 | Hired/Added | 10032700 | 0 | Hire | UCOP1 | Edwin | Martinez |
| UC_FULL_HIRE | 08/27/2018 | Hired/Added | 10032973 | 0 | Hire | UCOP1 | Leila | Legarda |
| UC_ADD_CWR | 08/27/2018 | Hired/Added | 10033086 | 0 | Add CWR | UCOP1 | Eric | Farley |
| UC_ADD_CWR | 08/27/2018 | Hired/Added | 10033087 | 1 | Add CWR | UCOP1 | Jonathan | Wells |
| UC_ADD_CWR | 08/27/2018 | Hired/Added | 10033085 | 0 | Add CWR | UCOP1 | Elizabeth | Timoszyk |
| UC_ADD_CWR | 08/27/2018 | Hired/Added | 10033133 | 0 | Add CWR | UCOP1 | Maggie | McDonald |
| | | | | | | | | |
| UC_ADD_CWR | 08/27/2018 | Hired/Added | 10033110 | 0 | Add CWR | UCOP1 | Kurt | Sprouse |

| Step | Action |
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| 25. | The filter displays all the transactions that have been processed by WFA Production. This filter allows you to quickly view the new UCPath Employee ID (Person ID) for a new hire. |
| 26. | Click the scroll bar. |

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| HR Review Status | Processed | ~ | Bu | siness Unit | Q | | | | , |
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| Transaction Type | All | ~ | | Empl ID | | | | | |
| Transaction Status | All | ~ | | First Name | | | | | |
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| Transaction Status | 2 | | | | | | Personalize Find | 1 View All 💷 📑 | First (|
| Template | Effective Date | Transaction Status | Person ID | Empl Record | Action | Business Unit | First Name | Last Name | |
| UC_FULL_HIRE | 08/27/2018 | Hired/Added | 10032642 | 0 | Hire | UCOP1 | Jason | Straub | |
| UC_FULL_HIRE | 08/27/2018 | Hired/Added | 10032820 | 0 | Hire | UCOP1 | John | Dea | |
| UC_FULL_HIRE | 08/27/2018 | Hired/Added | 10032700 | 0 | Hire | UCOP1 | Edwin | Martinez | |
| UC_FULL_HIRE | 08/27/2018 | Hired/Added | 10032973 | 0 | Hire | UCOP1 | Leila | Legarda | |
| UC_ADD_CWR | 08/27/2018 | Hired/Added | 10033086 | 0 | Add CWR | UCOP1 | Eric | Farley | |
| UC_ADD_CWR | 08/27/2018 | Hired/Added | 10033087 | 1 | Add CWR | UCOP1 | Jonathan | Wells | |
| UC_ADD_CWR | 08/27/2018 | Hired/Added | 10033085 | 0 | Add CWR | UCOP1 | Elizabeth | Timoszyk | |
| UC_ADD_CWR | 08/27/2018 | Hired/Added | 10033133 | 0 | Add CWR | UCOP1 | Maggie | McDonald | |
| UC_ADD_CWR | 08/27/2018 | Hired/Added | 10033110 | 0 | Add CWR | UCOP1 | Kurt | Sprouse | |
| UC_ADD_CWR | 08/27/2018 | Hired/Added | 10033144 | 0 | Add CWR | UCOP1 | Matthew | Crumpton | |
| Select All Dese | lect All | | | | | | | | |

| Step | Action |
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| 27. | Be cautious using the Delete Selected Transactions button. If you select the check box for a transaction and then click this button, the transaction will be deleted from the system. If the transaction has not been processed, it is deleted from WFA Production's queue and cannot be retrieved. |



| HR Review Statu | IS Processed | ~ | Bus | siness Unit | Q | | | | |
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| Transaction Typ | All | ~ | | Empl ID | | | | | |
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| Femplate | Effective Date | Transaction Status | Person ID | Empl Record | Action | Business Unit | First Name | Last Name | |
| IC_FULL_HIRE | 08/27/2018 | Hired/Added | 10032642 | 0 | Hire | UCOP1 | Jason | Straub | |
| C_FULL_HIRE | 08/27/2018 | Hired/Added | 10032820 | 0 | Hire | UCOP1 | John | Dea | |
| C_FULL_HIRE | 08/27/2018 | Hired/Added | 10032700 | 0 | Hire | UCOP1 | Edwin | Martinez | |
| IC_FULL_HIRE | 08/27/2018 | Hired/Added | 10032973 | 0 | Hire | UCOP1 | Leila | Legarda | |
| IC_ADD_CWR | 08/27/2018 | Hired/Added | 10033086 | 0 | Add CWR | UCOP1 | Eric | Farley | |
| IC_ADD_CWR | 08/27/2018 | Hired/Added | 10033087 | 1 | Add CWR | UCOP1 | Jonathan | Wells | |
| JC_ADD_CWR | 08/27/2018 | Hired/Added | 10033085 | 0 | Add CWR | UCOP1 | Elizabeth | Timoszyk | |
| IC_ADD_CWR | 08/27/2018 | Hired/Added | 10033133 | 0 | Add CWR | UCOP1 | Maggie | McDonald | |
| IC_ADD_CWR | 08/27/2018 | Hired/Added | 10033110 | 0 | Add CWR | UCOP1 | Kurt | Sprouse | |
| JC_ADD_CWR | 08/27/2018 | Hired/Added | 10033144 | 0 | Add CWR | UCOP1 | Matthew | Crumpton | |
| aloct All Dee | elect All | | | | | | | | |

| Step | Action |
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| 28. | You have viewed the status of Smart HR Template and TAM Prepare for Hire transactions. End of Procedure. |