

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**

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	Cancel	NEW		Hire	UCOP1	John	Dea
UC_FULL_HIRE	08/27/2018	Hired/Added	10032820	0	Hire	UCOP1	John	Martinez
UC_FULL_HIRE	08/27/2018	Hired/Added	10032700	0	Hire	UCOP1	Edwin	Legarda
UC_FULL_HIRE	08/27/2018	Hired/Added	10032973	0	Hire	UCOP1	Lella	Farley
UC_ADD_CWR	08/27/2018	Hired/Added	10033086	0	Add CWR	UCOP1	Eric	Wells
UC_ADD_CWR	08/27/2018	Hired/Added	10033087	1	Add CWR	UCOP1	Jonathan	Timoszyk
UC_ADD_CWR	08/27/2018	Hired/Added	10033085	0	Add CWR	UCOP1	Elizabeth	McDonald
UC_ADD_CWR	08/27/2018	Hired/Added	10033133	0	Add CWR	UCOP1	Maggie	Sprouse
UC_ADD_CWR	08/27/2018	Hired/Added	10033110	0	Add CWR	UCOP1	Kurt	Crumpton

Step	Action
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
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.	<p>The values you might see in the Transaction Status column include:</p> <ul style="list-style-type: none"> • 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.	<p>The Person ID column identifies the employee associated with the transaction.</p> <p>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.</p>
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.	<p>The Clone button appears when:</p> <ul style="list-style-type: none"> - 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 WFA Production. Refer to the Reason for Cancellation column on this page to view comments from WFA Production about the cancelled transaction. <p>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.</p>
12.	The Business Unit column identifies the employee's business unit.
13.	The Name columns identify the employee associated with the transaction.
14.	<p>For this example, update the HR Review Status to display all Cancelled transactions.</p> <p>Click the button to the right of the HR Review Status field.</p> <p><input type="button" value="v"/></p>

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Transaction Status

The following transactions are pending, canceled or have been processed by Human Resources.

HR Review Status:
 Business Unit:
 Transaction Type:
 Transaction Status:
 Start Date From:

Empl ID:
 First Name:
 Last Name:

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	Cancel	NEW		Hire	<input type="button" value="Clone"/> UCOP1	John	Dea
UC_FULL_HIRE	08/27/2018	Hired/Added	10032820	0	Hire	UCOP1	John	Martinez
UC_FULL_HIRE	08/27/2018	Hired/Added	10032700	0	Hire	UCOP1	Edwin	Legarda
UC_FULL_HIRE	08/27/2018	Hired/Added	10032973	0	Hire	UCOP1	Lella	Farley
UC_ADD_CWR	08/27/2018	Hired/Added	10033086	0	Add CWR	UCOP1	Eric	Wells
UC_ADD_CWR	08/27/2018	Hired/Added	10033087	1	Add CWR	UCOP1	Jonathan	Timoszyk
UC_ADD_CWR	08/27/2018	Hired/Added	10033085	0	Add CWR	UCOP1	Elizabeth	McDonald
UC_ADD_CWR	08/27/2018	Hired/Added	10033133	0	Add CWR	UCOP1	Maggie	Sprouse
UC_ADD_CWR	08/27/2018	Hired/Added	10033110	0	Add CWR	UCOP1	Kurt	Crumpton

Step	Action
15.	Click the Cancelled list item. <input type="text" value="Cancelled"/>
16.	Click the Refresh button. <input type="button" value="Refresh"/>

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Transaction Status

The following transactions are pending, canceled or have been processed by Human Resources.

HR Review Status:
 Transaction Type:
 Transaction Status:
 Start Date From: To:
 Business Unit:
 Empl ID:
 First Name:
 Last Name:

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	UCOP1	John	Dea

Go To [Smart HR Transactions](#)

Step	Action
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, canceled or have been processed by Human Resources.

To:
 Business Unit:
 Empl ID:
 First Name:
 Last Name:

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	UCOP1	John	Dea	View Comments	

Step	Action
19.	<p>In some cases, WFA Production may need to cancel a template transaction. When a transaction is 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.</p> <p>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.</p> <p>Note: To view comments about a TAM transaction that was cancelled by WFA Production you must refer to the email notification.</p>
20.	<p>The View Email Text column displays a View link if WFA Production sent an email to the Location Template Initiator about a template transaction.</p> <p>Note: This functionality is not used for TAM transactions.</p>
21.	Click the scroll bar.

The screenshot displays the 'Transaction Status' page in UCPath. At the top right, there are links for 'New Window', 'Help', and 'Personalize Page'. The main heading is 'Transaction Status', followed by a sub-heading: 'The following transactions are pending, canceled or have been processed by Human Resources.' Below this, there are several search filters: 'HR Review Status' (set to 'Cancelled'), 'Business Unit' (with a search icon), 'Transaction Type' (set to 'All'), 'Empl ID' (input field), 'Transaction Status' (set to 'All'), 'First Name' (input field), 'Start Date From' (08/27/2018), 'To' (09/16/2018), and 'Last Name' (input field). There are 'Refresh', 'Clear', and 'Download' buttons. Below the filters is a table with the following data:

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

At the bottom of the table, there is a 'Go To' link for 'Smart HR Transactions'.

Step	Action
22.	<p>For the next example, update the HR Review Status to display Processed transactions.</p> <p>Click the button to the right of the HR Review Status field.</p> 

Step	Action
23.	Click the Processed list item.
24.	Click the Refresh button.

Transaction Status

The following transactions are pending, canceled or have been processed by Human Resources.

HR Review Status: Business Unit:

Transaction Type: Empl ID:

Transaction Status: First Name:

Start Date From: To: Last Name:

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
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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

Step	Action
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.

HR Review Status Business Unit

Transaction Type Empl ID

Transaction Status First Name

Start Date From To Last Name

Transaction Status Personalize | Find | 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
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UC_ADD_CWR	08/27/2018	Hired/Added	10033144	0	Add CWR	UCOP1	Matthew	Crumpton

Select All

Go To

Step	Action
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 Status Business Unit

Transaction Type Empl ID

Transaction Status First Name

Start Date From To Last Name

Transaction Status Personalize | Find | 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
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UC_ADD_CWR	08/27/2018	Hired/Added	10033144	0	Add CWR	UCOP1	Matthew	Crumpton

Select All Deselect All

Go To Smart HR Transactions

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