

Use this task to clone a template transaction. The cloning function is available when:

- A template transaction was denied by a Location Approver.
- A template transaction was cancelled by UCPC WFA Production.

**Navigation:** PeopleSoft Menu > Workforce Administration > Smart HR Template > **Transaction Status**

Transaction Status

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

HR Review Status: All  
Transaction Type: All  
Transaction Status: All  
Start Date From: 09/30/2018 To: 10/20/2018  
Business Unit: [Search]  
Empl ID: [Search]  
First Name: [Search]  
Last Name: [Search]

Refresh Clear Download

Group Box Header 1

Transaction Status

Select All Deselect All  
Delete Selected Transactions

Go To Smart HR Transactions

Step	Action
1.	<p>Use the <b>Template Status</b> page to search for cancelled or denied template transactions that you can clone, update and resubmit for processing.</p> <p>Template transactions must have a <b>Transaction Status</b> of <b>Cancel</b> or <b>Denied</b> to be cloned.</p>
2.	<p>You can narrow the search by the <b>HR Review Status</b>.</p> <p>Click the button to the right of the <b>HR Review Status</b> field.</p> <p>▼</p>

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### Transaction Status

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

HR Review Status: **All** (Cancelled, My Transactions, Pending, Processed)  
 Transaction Type: **All**  
 Transaction Status: **All**  
 Start Date From: 09/30/2018 To: 10/20/2018  
 Business Unit:   
 Empl ID:   
 First Name:   
 Last Name:

[Refresh](#) [Clear](#) [Download](#)

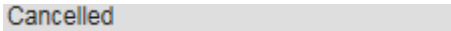

Group Box Header 1

Select	Template	Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last Name
<input type="checkbox"/>									

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[Select All](#) [Deselect All](#)  
[Delete Selected Transactions](#)

Go To [Smart HR Transactions](#)

Step	Action
3.	For this example, click the <b>Cancelled</b> list item. 
4.	You can also narrow the list by the transaction type. Click the button to the right of the <b>Transaction Type</b> field. 

Transaction Status

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

HR Review Status:  Business Unit:

Transaction Type:   
Change Job Data  
Change Job and Profile Data  
Change Personal Data  
Change Personal and Job Data  
Change Personal and Profile Data  
Change Personal, Job and Profile Data  
Change Profile Data  
**Hire/Rehire**  
Hire/Rehire and Profile Data

Start Date From:



Empl ID:   
First Name:   
Last Name:

Group Box Header 1

Select	Template	Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last Name
<input type="checkbox"/>									

Select All Deselect All

Go To Smart HR Transactions

Step	Action
5.	For this example, click the <b>Hire/Rehire</b> list item. 
6.	The <b>Start Date From</b> field defaults a date that is 10 days prior to the current date.  The <b>Start Date To</b> field defaults a date that is 10 days after the current date.  The <b>Effective Date</b> of the transaction you are searching for must fall within these dates.
7.	Click the <b>Refresh</b> button. 

Transaction Status

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

HR Review Status:  Business Unit:  Empl ID:

Transaction Type:  First Name:

Transaction Status:  Last Name:

Start Date From:  To:

Select	Template	Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10008356	2	Hire	<input type="button" value="Clone"/>	RVCMP	Estela
<input type="checkbox"/>	UC_CONC_HIRE	10/01/2018	Cancel	10022099	2	Hire	<input type="button" value="Clone"/>	RVCMP	Royce
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10006374	3	Hire	<input type="button" value="Clone"/>	RVCMP	Joshua
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10062082	1	Hire	<input type="button" value="Clone"/>	LACMP	Nicholas
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10030853	2	Hire	<input type="button" value="Clone"/>	RVCMP	Maure
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10006592	1	Hire	<input type="button" value="Clone"/>	RVCMP	Daniel
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10027651	1	Hire	<input type="button" value="Clone"/>	RVCMP	Melissa

Select All

Go To [Smart HR Transactions](#)

Step	Action
8.	<p>The template transactions that meet the search criteria appear. The <b>Clone</b> button is available only for transactions with a <b>Transaction Status</b> of <b>Cancel</b> or <b>Denied</b>.</p> <p>The <b>Clone</b> button appears when:</p> <ul style="list-style-type: none"> <li>- A template transaction was <b>denied</b> by a Location Approver. Refer to the <b>SS Smart HR Transactions</b> page to view comments from the Approver about the denied transaction.</li> <li>- A template transaction was <b>cancelled</b> by UCPC WFA Production. Refer to the <b>Reason for Cancellation</b> column on this page to view comments from WFA Production about the cancelled transaction.</li> </ul>
9.	Click the scroll bar.
10.	<p>When a transaction is cancelled, WFA Production enters a comment to explain why the transaction was cancelled. Template Initiators can <b>View Comments</b> and, if needed, <b>Clone</b> the transaction to resubmit it with necessary corrections.</p> <p><b>Note:</b> To view comments about a transaction that was <b>denied</b> by a Location Approver you must navigate to the <b>SS Smart HR Transactions</b> page and review the <b>Approver Comments</b> field.</p>

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led or have been processed by Human Resources.

Business Unit:

Empl ID:

First Name:

Last Name:

To: 10/20/2018

Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last Name	Reason for Cancellation
10/01/2018	Cancel	10008356	2	Hire	<input type="button" value="Clone"/> RVCMP	Estela	Hintgen	<input type="button" value="View Comments"/>
10/01/2018	Cancel	10022099	2	Hire	<input type="button" value="Clone"/> RVCMP	Royce	Chao	<input type="button" value="View Comments"/>
10/01/2018	Cancel	10006374	3	Hire	<input type="button" value="Clone"/> RVCMP	Joshua	Betlachin	<input type="button" value="View Comments"/>
10/01/2018	Cancel	10062082	1	Hire	<input type="button" value="Clone"/> LACMP	Nicholas	Flores	<input type="button" value="View Comments"/>
10/01/2018	Cancel	10030853	2	Hire	<input type="button" value="Clone"/> RVCMP	Maure	Goto	<input type="button" value="View Comments"/>
10/01/2018	Cancel	10006592	1	Hire	<input type="button" value="Clone"/> RVCMP	Daniel	Araujo	<input type="button" value="View Comments"/>
10/01/2018	Cancel	10027651	1	Hire	<input type="button" value="Clone"/> RVCMP	Melissa	Carter	<input type="button" value="View Comments"/>

Step	Action
11.	Click the <b>View Comments</b> link. <input type="button" value="View Comments"/>

Navigation: Favorites | Main Menu | Workforce Administration | Smart HR Template | Transaction Status

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Cancelled Transaction Comments

Comments

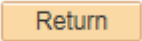
Cancellation Date: 7/2/18  
Transaction #: T000014984

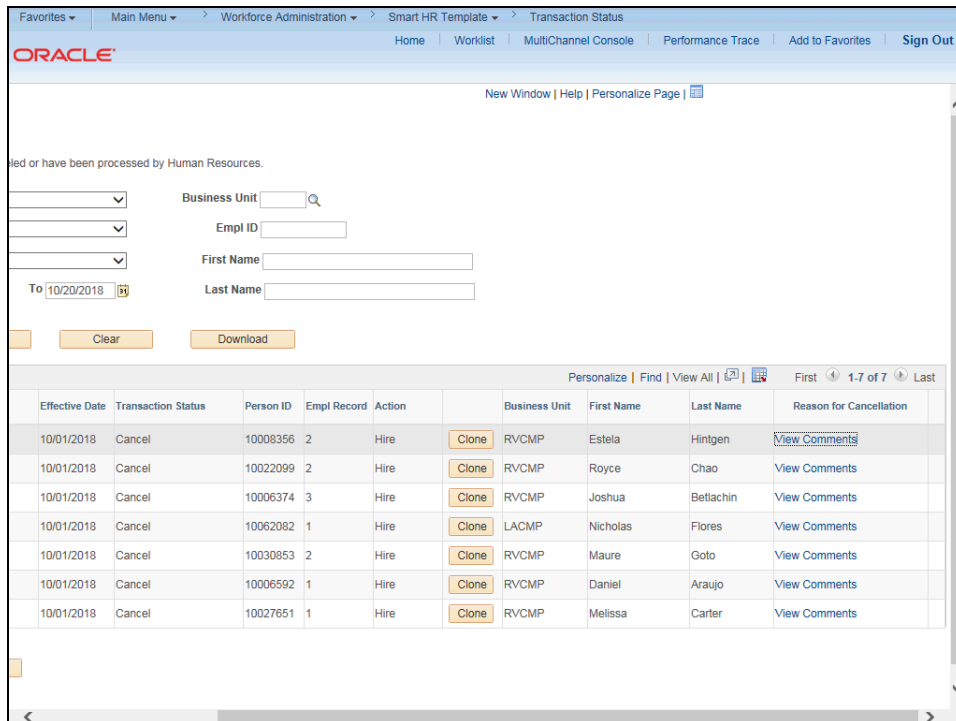
Please be advised this template transaction has been cancelled.

Reason for cancellation:  
Advised to cancel per case 00214974.

If applicable, a revised transaction may be submitted through UCPath for processing.

Thank you,  
UCPath Center

Step	Action
12.	Review the comment. This is helpful information for correcting the template transaction or identifying the supporting documentation that is needed.
13.	Click the <b>Return</b> button. 



ed or have been processed by Human Resources.

Business Unit

Empl ID

First Name

Last Name

To 10/20/2018

Personalize | Find | View All | 1-7 of 7 | Last

Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last Name	Reason for Cancellation
10/01/2018	Cancel	10008356	2	Hire	RVCMP	Estela	Hintgen	<a href="#">View Comments</a>
10/01/2018	Cancel	10022099	2	Hire	RVCMP	Royce	Chao	<a href="#">View Comments</a>
10/01/2018	Cancel	10006374	3	Hire	RVCMP	Joshua	Betlachin	<a href="#">View Comments</a>
10/01/2018	Cancel	10062082	1	Hire	LACMP	Nicholas	Flores	<a href="#">View Comments</a>
10/01/2018	Cancel	10030853	2	Hire	RVCMP	Maure	Goto	<a href="#">View Comments</a>
10/01/2018	Cancel	10006592	1	Hire	RVCMP	Daniel	Araujo	<a href="#">View Comments</a>
10/01/2018	Cancel	10027651	1	Hire	RVCMP	Melissa	Carter	<a href="#">View Comments</a>

Step	Action
14.	Click the scroll bar.

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:

Select	Template	Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10008356	2	Hire	<input type="button" value="Clone"/>	RVCMP	Estela Hintgen
<input type="checkbox"/>	UC_CONC_HIRE	10/01/2018	Cancel	10022099	2	Hire	<input type="button" value="Clone"/>	RVCMP	Royce Ch...
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10006374	3	Hire	<input type="button" value="Clone"/>	RVCMP	Joshua Bet...
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10062082	1	Hire	<input type="button" value="Clone"/>	LACMP	Nicholas Flor...
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10030853	2	Hire	<input type="button" value="Clone"/>	RVCMP	Maure Got...
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10006592	1	Hire	<input type="button" value="Clone"/>	RVCMP	Daniel Ara...
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10027651	1	Hire	<input type="button" value="Clone"/>	RVCMP	Melissa Cart...

Select All Deselect All

Go To Smart HR Transactions

Step	Action
15.	<p>Use the <b>Clone</b> button to copy the existing template information into a new template.</p> <p>For this example, clone the concurrent hire (academic) template for <b>Estela Hintgen</b>.</p> <p>Click the <b>Clone</b> button.</p> <div><input type="button" value="Clone"/></div>
16.	After the template transaction is cloned, the <b>Clone</b> button is no longer available.

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:

Select	Template	Effective Date	Transaction Status	Person ID	Empl Record	Action	Business Unit	First Name	Last
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10008356	2	Hire	<input type="button" value="Clone"/> RVCMP	Estela	Hint
<input type="checkbox"/>	UC_CONC_HIRE	10/01/2018	Cancel	10022099	2	Hire	<input type="button" value="Clone"/> RVCMP	Royce	Cha
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10006374	3	Hire	<input type="button" value="Clone"/> RVCMP	Joshua	Beti
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10062082	1	Hire	<input type="button" value="Clone"/> LACMP	Nicholas	Flori
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10030853	2	Hire	<input type="button" value="Clone"/> RVCMP	Maure	Gotc
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10006592	1	Hire	<input type="button" value="Clone"/> RVCMP	Daniel	Arau
<input type="checkbox"/>	UC_CONC_HIRE_AC	10/01/2018	Cancel	10027651	1	Hire	<input type="button" value="Clone"/> RVCMP	Melissa	Cart

Select All Deselect All

Go To [Smart HR Transactions](#)

Step	Action
17.	<p>To access the cloned template navigate to the <b>Smart HR Transactions</b> page.</p> <p>Click the <b>Smart HR Transactions</b> link.</p> <p><a href="#">Smart HR Transactions</a></p>



Smart HR Transactions

Select a template and press Create Transaction.

**Transaction Template**

Transaction Type: All Effective Date:

Select Template:

Create Transaction

Transaction Type: All Refresh

**Transactions in Progress**

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/01/2018	Claire Ramirez	10005571	Transfer	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Cassandra Perry	NEW	Hire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Gus Gonzalez	NEW	Hire	United States
<input type="checkbox"/>	JOB	09/29/2018	Grisby, Elizabeth N	10000841	Terminatn	United States
<input type="checkbox"/>	HIRE	10/01/2018	<a href="#">Hintgen, Estela Martin</a>	10008356	Hire	United States

Delete Selected Transactions

Go To Transaction Status

Step	Action
18.	<p>The <b>Smart HR Transactions</b> page only displays the transaction that you submit. Therefore:</p> <ul style="list-style-type: none"><li>• If you clone a transaction that you didn't originally submit, only the cloned transaction displays in the <b>Smart HR Transactions</b> page.</li><li>• If you clone a transaction that you did originally submit, both the original and the cloned transaction displays in the <b>Smart HR Transactions</b> page.</li></ul>
19.	<p>The cloned template appears in the <b>Transactions in Progress</b> section. Click the <b>Name</b> link to open the template and update as needed.</p> <p>For this example, click the <b>Hintgen, Estela Martin</b> link.</p> <p><a href="#">Hintgen, Estela Martin</a></p>

Smart HR Transactions

Enter Transaction Details

Name Estela Hintgen

The following transaction details are required.

Template Academic Concurrent Hire/Inter Location Transfer

Organizational Relationship Employee

\*Employee ID 10008356 x Q Estela Hintgen


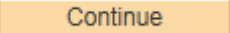
\*Effective Date 11/01/2018

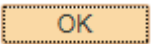
Action Hire

\*Reason Code Academic Concurrent Hire

\*Address Format United States

Continue Cancel

Step	Action
20.	Update the fields on the <b>Enter Transaction Details</b> page as needed.  For this example, the <b>Reason Code</b> must be updated.
21.	Click the button to the right of the <b>Reason Code</b> field. 
22.	For this example, click the <b>Transfer-Intra Location</b> list item.
23.	Click the <b>Continue</b> button. 

Step	Action
24.	Click the <b>OK</b> button. 

Step	Action
25.	Update the employee's <b>Personal Data</b> as needed.
26.	Click the scroll bar.

Person Address 01 - United States

\*Address Type  Address Line 1

Address Line 2  City

State  Postal Code

Person Phone Number Personalize | Find | View All | First | 1 of 1 | Last

Phone Type  Telephone  Preferred ☐

Person Email Address Personalize | Find | View All | First | 1 of 1 | Last

Email Type  Email Address

Comments

Comments

Return to Enter Transaction Details Page

[Supporting documents](#)

Transaction ID: T000032274

Initiator Comments:

Step	Action
27.	Click in the <b>Comments</b> field.
28.	Enter the desired information into the <b>Comments</b> field.  For this example, enter <b>Resubmit cancelled transaction with Action Reason of Transfer-Intra Location..</b>
29.	Click the scroll bar.

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC\_CONC\_HIRE\_AC      Name: Estela Hintgen  
Effective Date: 11/01/2018      Action/Action Reason: HIR/TIL (Transfer-Intra Location)  
Employee ID: 10008356      Employee Record:

Personal Data   Job Data   Earnings Dist

**Employee Information**

**Primary Name - English**

\*First Name       Middle Name   
\*Last Name       Name Suffix

**Birth Information**

Date of Birth

**Person Education Level**


Highest Education Level

**Person National ID United States**

National ID Type       National ID

**Person Address 01 - United States**

\*Address Type       Address Line 1   
Address Line 2       City   
State       Postal Code

Step	Action
30.	Click the <b>Job Data</b> tab. 

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC\_CONC\_HIRE\_AC      Name: Estela Hintgen  
Effective Date: 11/01/2018      Action/Action Reason: HIR/TIL (Transfer-Intra Location)  
Employee ID: 10008356      Employee Record:

Personal Data   **Job Data**   Earnings Dist

**Employee Information**

**Work Location - Position Data**

\*Position Number

**Work Location - Job Fields**

Business Unit       Department   
Location Code       Establishment ID

**Job Information - Job Code**

Job Code

**Job Information - United States**

FLSA Status

**Job Labor - Union Code**

Union Code

**Job Information - Reporting Information**

Reports To Position Number

**Job Information - Employee Classification**

Step	Action
31.	Update the employee's <b>Job Data</b> as needed.
32.	Click the scroll bar.

The screenshot displays the 'Enter Transaction Details' page in the Oracle UCPath system. The page is divided into several sections with expandable/collapsible headers:

- Job Information - Employee Classification:** Includes fields for 'Employee Classification' and 'Classified/Unclassified' (set to 'Professional & Support Staff').
- Job Information - Standard Hours:** Includes 'Standard Hours' (19.600000) and 'FTE' (0.490000).
- UC Job Data:** Includes 'Academic Duration of Appt', 'Location Use End Date', 'Location Use Type', and 'Post Docs Anniversary Date'.
- Job - Salary Plan:** Includes 'Salary Administration Plan' (STRV), 'Salary Grade' (2), and 'Step'.
- Job Compensation - Pay Components:** A table with columns: 'Comp Rate Code', 'Compensation Rate', 'Compensation Frequency', and 'Rate Code Source'. It shows one row with '1 UCHRLY', '24.180000', 'H', and 'Manual'.
- Job Compensation - Payroll Currency and Frequency:** Includes '\*Compensation Frequency'.
- Work Location - Expected Job End Date:** Includes 'Expected Job End Date' (12/31/2018) and a checkbox for 'End Job Automatically'.

At the bottom, there are buttons for 'Save and Submit', 'Save for Later', 'Cancel', and a link for 'Supporting documents'. A vertical scroll bar is located on the right side of the form area.

Step	Action
33.	Click the scroll bar.

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC\_CONC\_HIRE\_AC      Name: Estela Hintgen  
Effective Date: 11/01/2018      Action/Action Reason: HIR/TIL (Transfer-Intra Location)  
Employee ID: 10008356      Employee Record:

Personal Data   Job Data   Earnings Dist

**Employee Information**

**Work Location - Position Data**

\*Position Number 40024805

**Work Location - Job Fields**

Business Unit RVCMP      Department D01004  
Location Code P5194      Establishment ID UCR

**Job Information - Job Code**

Job Code 004921

**Job Information - United States**

FLSA Status Nonexempt

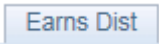
**Job Labor - Union Code**

Union Code 99

**Job Information - Reporting Information**

Reports To Position 40007741  
Number

**Job Information - Employee Classification**

Step	Action
34.	Click the <b>Earnings Dist</b> tab. 

Smart HR Transactions

Enter Transaction Information

[Click here to Hide Header Details](#)

Template: UC\_CONC\_HIRE\_AC      Name: Estela Hintgen  
Effective Date: 11/01/2018      Action/Action Reason: HIR/TIL (Transfer-Intra Location)  
Employee ID: 10008356      Employee Record:

Personal Data   Job Data   Earnings Dist

**Job Earnings Distribution Type**

Earnings Distribution Type None      Aggregate Comp Rate

**Job Earnings Distribution**      Personalize | Find | View All | 1 of 1 | First | Last

Earnings Code	Compensation Rate	Percent of Distribution
1		

Return to Enter Transaction Details Page

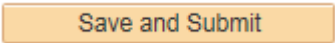
Save and Submit   Save for Later   Cancel   Supporting documents

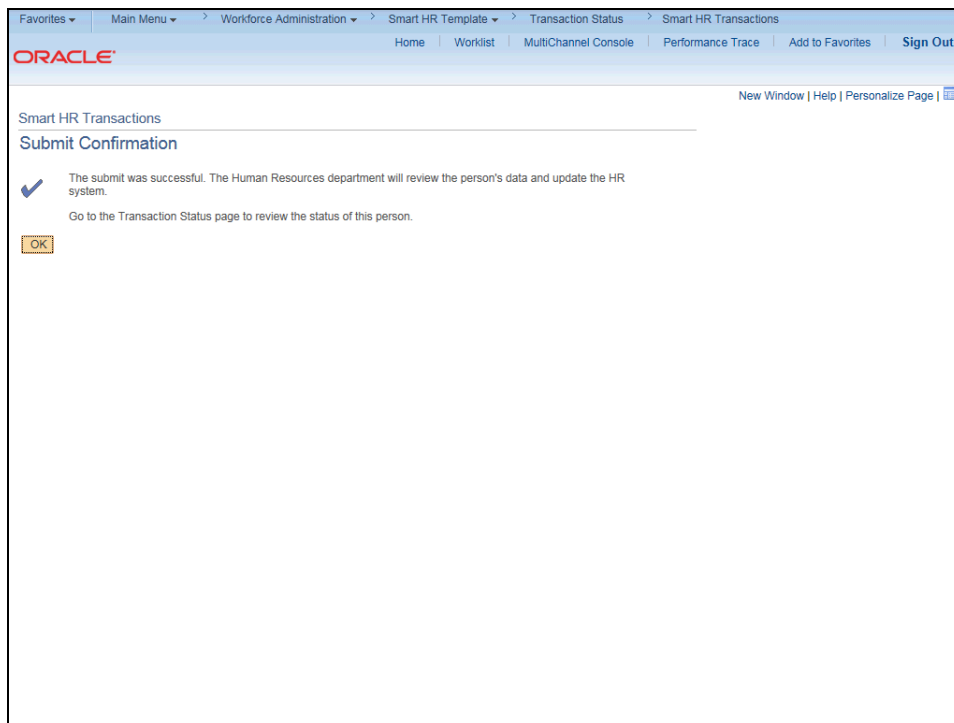
Transaction ID: T000032274


Initiator Comments:

Requester ID: 10038625      Initiator

Requested: 10/10/2018 9:13:09.000000AM

Step	Action
35.	Update the employee's <b>Job Earnings Distribution</b> information as needed.
36.	Use the <b>Supporting Documents</b> link to add attachments as needed.
37.	Click the <b>Save and Submit</b> button. 



Step	Action
38.	Click the <b>OK</b> button. 



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Smart HR Transactions

Select a template and press Create Transaction.

Transaction Template

Transaction Type: All Effective Date: [ ]

Select Template: [ ] Create Transaction

Transaction Type: All Refresh

Transactions in Progress

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	JOB	11/01/2018	Claire Ramirez	10005571	Transfer	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Cassandra Perry	NEW	Hire	United States
<input type="checkbox"/>	HIREJPM	11/01/2018	Gus Gonzalez	NEW	Hire	United States
<input type="checkbox"/>	JOB	09/29/2018	Grisby, Elizabeth N	10000841	Terminatn	United States
<input type="checkbox"/>	HIRE	11/01/2018	Tam Triet Ngo Duc	10008356	Hire	United States

Delete Selected Transactions

Go To Transaction Status

Step	Action
39.	You have cloned a template transaction that has been cancelled or denied. <b>End of Procedure.</b>