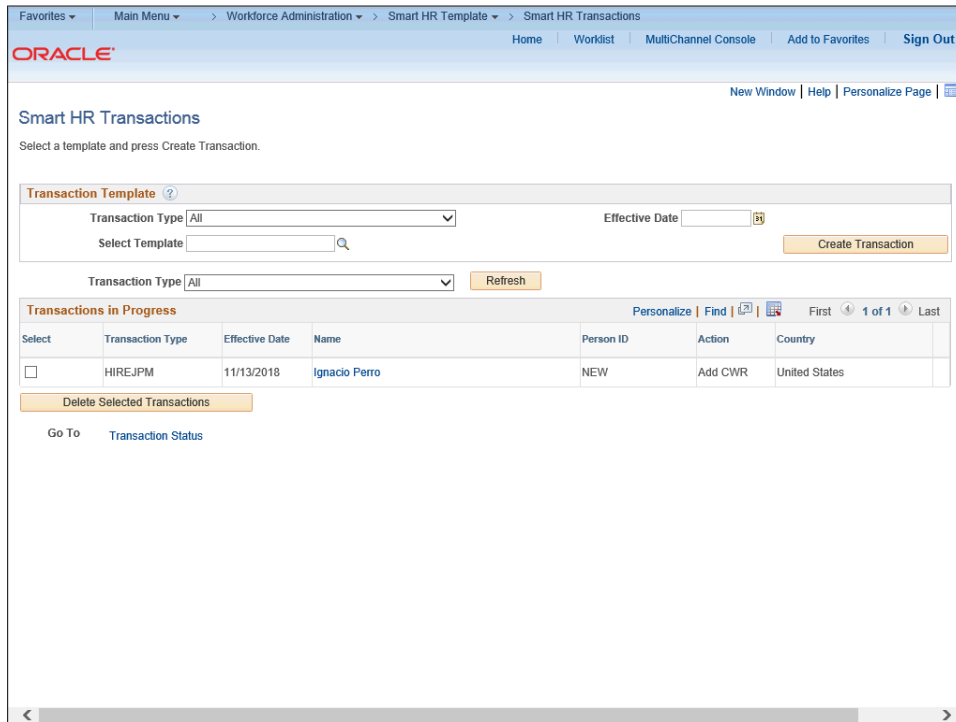



Use this task to initiate a complete contingent worker instance template transaction.

Navigation: PeopleSoft Menu > Workforce Administration > Smart HR Template > **Smart HR Transactions**

Note: This page also may be available in **Workcenter** depending on your security access.




Step	Action
1.	Use the Smart HR Transactions page to initiate a template transaction.
2.	Click the Look up Select Template button. Note: The Transaction Type field is not used by UC. 
3.	Select the appropriate contingent worker template. There are multiple templates for contingent worker transactions. Click the UC_COM_CWR list item. UC_COM_CWR

**UCPath Task:
Initiate Complete Contingent Worker Instance
Template Transaction**

Step	Action
4.	Click in the Effective Date field. <input type="text"/>
5.	The Effective Date field is the effective date of the selected template action. The date you enter in this field automatically populates the Effective Date field on the Enter Transaction Details page. You can update the Effective Date on the Enter Transaction Details page if needed. Enter the desired information into the Effective Date field.
6.	Click the Create Transaction button. <input type="button" value="Create Transaction"/>

The screenshot shows the Oracle UCPATH PILOT interface for 'Enter Transaction Details'. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Smart HR Template > Smart HR Transactions. The page title is 'Smart HR Transactions' and the sub-header is 'Enter Transaction Details'. Below the header, it states 'The following transaction details are required.' The form fields are: Template (Complete Contingent Worker Instance), Organizational Relationship (Contingent Worker), *Employee ID (with a search icon), *Employment Record Number (dropdown menu), *Effective Date (12/01/2018 with a calendar icon), Action (Completion - Contingent Worker), and Reason Code (Completion - Contingent Worker). At the bottom, there are 'Continue' and 'Cancel' buttons.

Step	Action
7.	In the Employee ID field, enter the person’s ID number or use the lookup to search for and select it. You can enter or select only the CWR records to which you have UCPATH department access. Enter the desired information into the Employee ID field.
8.	The Employment Record Number defaults to the first record number for which you have departmental access (in this example, 0). Select the correct Employment Record Number for the completed job.
9.	The Effective Date is populated based on your entry on the previous page. Ensure this is the date on which the completion takes effect. Typically, this is one business day after last date worked. For this example, accept the default date.
10.	Click the Continue button. 
11.	The complete contingent worker template appears. The top of the page displays header data, which you can show/hide as needed.

UCPath Task:
Initiate Complete Contingent Worker Instance
Template Transaction

Smart HR Transactions
Enter Transaction Information

Click here to Hide Header Details

Template: UC_COM_CWR Name: Arlene Small
Effective Date: 12/01/2018 Action/Action Reason: COM/COM (Completion - Contingent Worker)
Employee ID: 10029452 Employee Record: 0 (Ind Contractor/Consultnt)

Return to Enter Transaction Details Page

Save and Submit Save for Later Cancel

Job Data

Job Information - United States

Last Date Worked: 11/30/2018


Comments

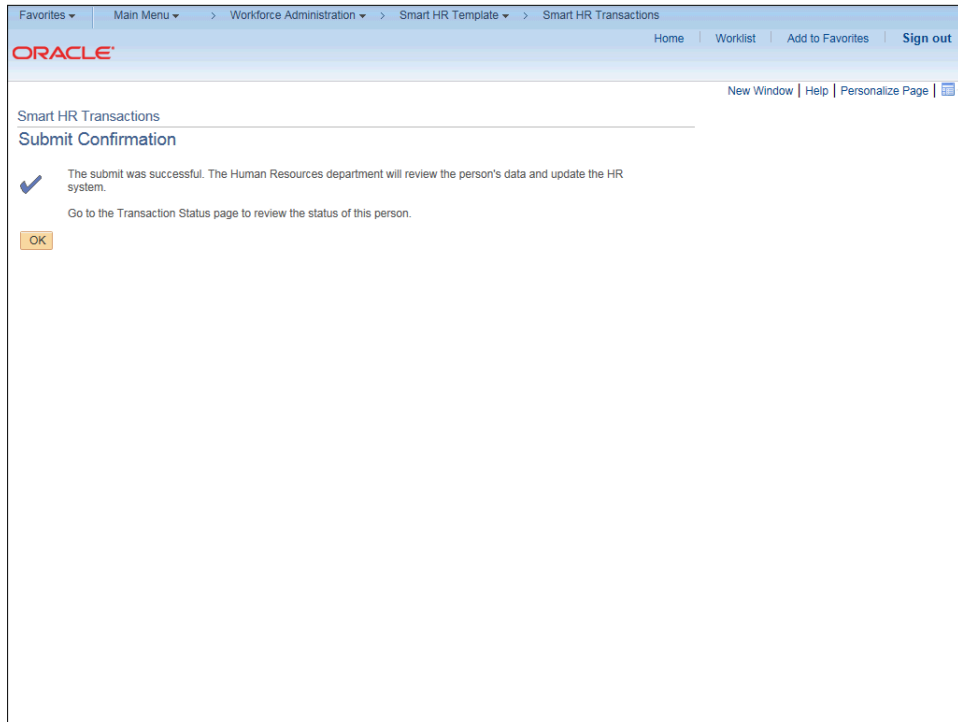
Comments


Return to Enter Transaction Details Page

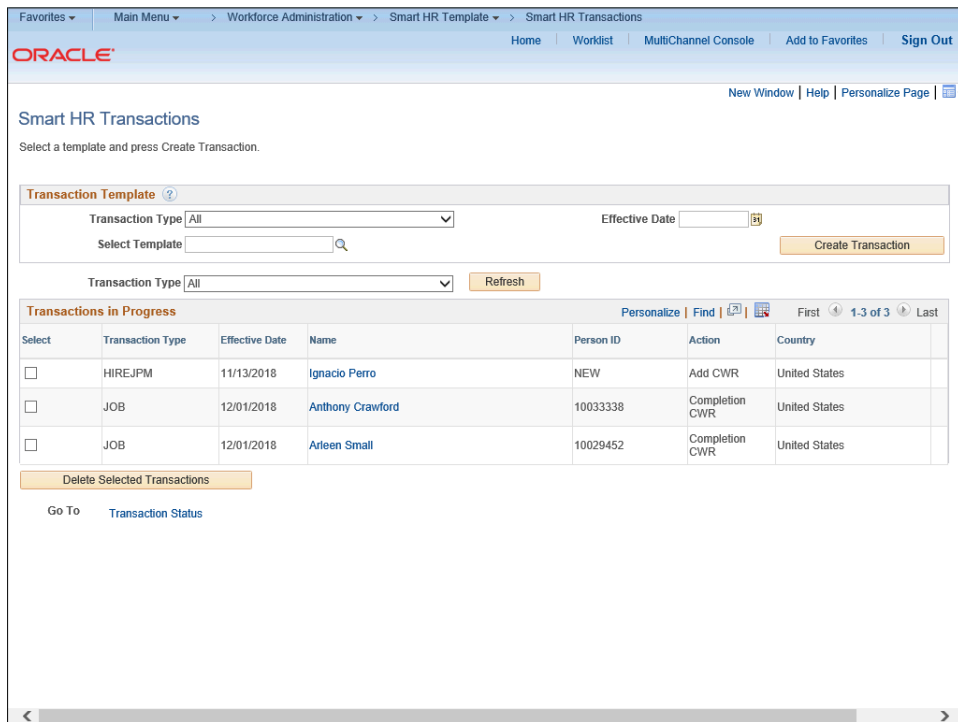
Save and Submit Save for Later Cancel Supporting documents

Transaction ID: NEW
Initiator Comments:

Step	Action
12.	The Last Date Worked field value defaults to one business day prior to the effective date you entered on the previous page. If the effective date is a Monday, then the Last Date Worked field defaults to the prior Friday's date. You can update this value if necessary.
13.	Use the Comments field to enter specific details or explanation regarding the transaction. This field is referenced by UCPC WFA Production to assist with processing the transaction.
14.	Use the Supporting documents link to attach supporting documents.
15.	Enter comments for the Approver in the Initiator Comments field. Comments you enter here appear only with the request; they do not display on the employee's record after the transaction is processed to completion.
16.	Click the Save and Submit button. 



Step	Action
17.	Click the OK button. 



Step	Action
18.	The template transaction is routed for approval and appears in the Transactions in Progress section until it is processed.
19.	You have initiated a complete contingent worker instance template transaction. End of Procedure.