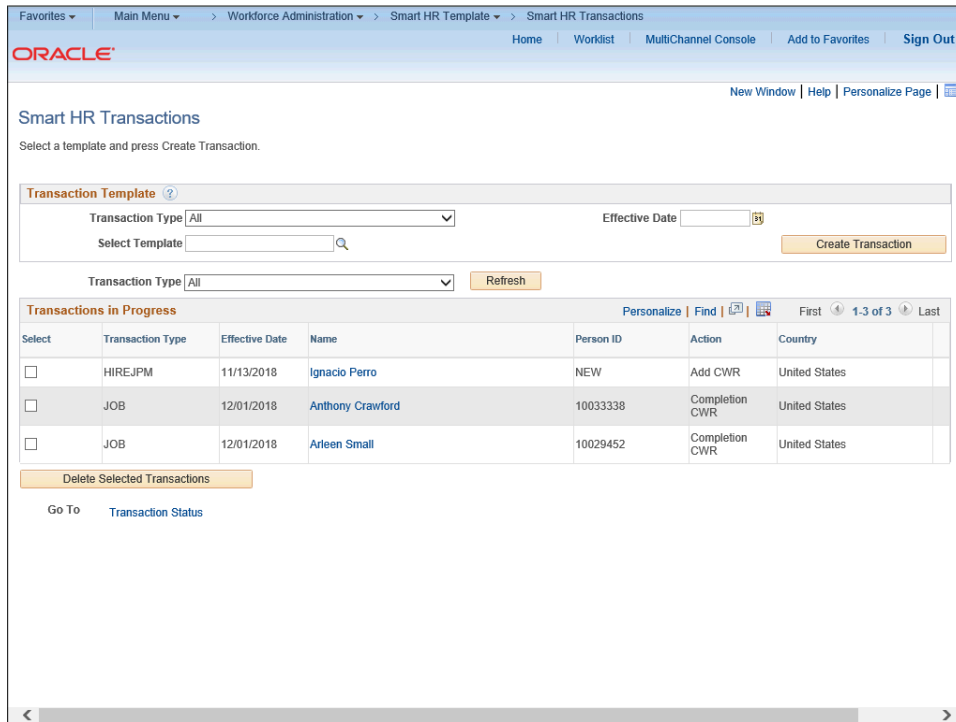




Use this task to initiate a renew contingent worker (no position) template transaction.

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.

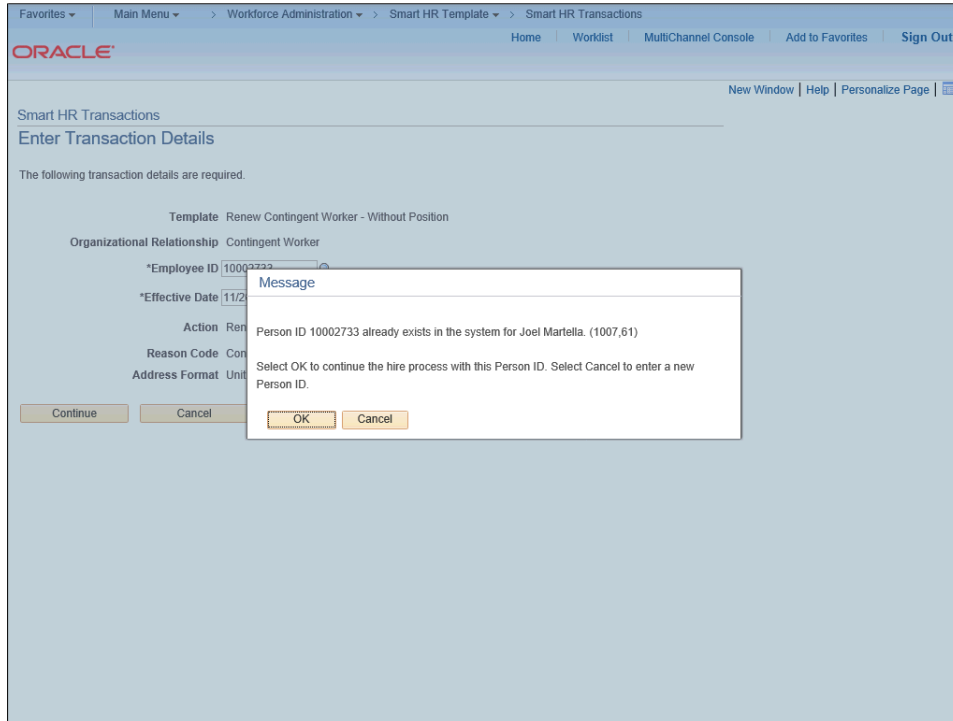



Step	Action
1.	Use the Smart HR Transactions page to initiate a template transaction.
2.	Click the Look up Select Template button. Note: The Transaction Type field is not used by UC. 
3.	Select the appropriate renew contingent worker template. Notice there are two renew contingent worker templates, one for contingent workers with a position and one for those without position data. Click the UC_RENW_CWR list item. 

UCPath Task:
Initiate Renew Contingent Worker (No Position)
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"/>
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 Effective Date is populated based on your entry on the previous page. Ensure this is the date on which the employment renewal begins.

Step	Action
9.	Click the Continue button. 



Step	Action
10.	UCPath displays a message indicating the individual already exists in the system. Verify that the displayed employee ID and name corresponds with the individual for which you are renewing employment. Click the OK button. 
11.	The renew contingent worker template appears. The top of the page displays header data, which you can show/hide as needed.

UCPath Task:
Initiate Renew Contingent Worker (No Position)
Template Transaction


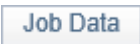
The screenshot shows the Oracle Smart HR Transactions interface. The breadcrumb trail is: Favorites > Main Menu > Workforce Administration > Smart HR Template > Smart HR Transactions. The page title is 'Smart HR Transactions' and the sub-header is 'Enter Transaction Information'. There is a link to 'Click here to Hide Header Details'. The transaction details are: Template: UC_RENW_CWR, Name: Joel Martella, Effective Date: 11/26/2018, Action/Action Reason: RNW/RNW (Contingent Worker Renewal), and Employee ID: 10002733. Below this are two tabs: 'Personal Data' (selected) and 'Job Data'. The 'Personal Data' section includes: 'Employee Information' with 'Primary Name - English' (First Name: Joel, Middle Name: , Last Name: Martella, Name Suffix:); 'Person National ID United States' (National ID Type: PR, National ID: 000124947); 'Person Address 01 - United States' (Address Type: Home, Address Line 1: 300 Lakeside Dr, Address Line 2: , City: Oakland, State: CA, Postal Code: 94612, County:); 'UC Patent Acknowledgment' (Patent Acknowledgment Sign Dt: , Modified Patent Ackmnt Sign Dt:); and a 'Comments' section.

Step	Action
12.	The renew contingent worker template includes two tabs: Personal Data and Job Data . The employee's personal data automatically populates. Update the personal information, if needed.
13.	Scroll down to display additional fields and page functions. Click the scroll bar.

The screenshot shows the Oracle UCPATH PILOT interface for 'Smart HR Transactions'. The page is divided into several sections:

- Primary Name - English:** Fields for *First Name (Joel), Middle Name, *Last Name (Martella), and Name Suffix.
- Person National ID United States:** Fields for National ID Type (FR) and National ID (000124947).
- Person Address 01 - United States:** Fields for *Address Type (Home), Address Line 1 (300 Lakeside Dr), Address Line 2, City (Oakland), State (CA), *Postal Code (94612), and County.
- UC Patent Acknowledgment:** Fields for Patent Acknowledgment Sign Dt and a checkbox for Modified Patent Ackmnt Sign Dt.
- Comments:** A large text area for entering comments.

At the bottom of the form, there are buttons for 'Save and Submit', 'Save for Later', and 'Cancel', along with a 'Supporting documents' link. The 'Transaction ID' is set to 'NEW' and there is a field for 'Initiator Comments'.

Step	Action
14.	Click in the Patent Acknowledgment Sign Dt field. 
15.	Enter the desired information into the Patent Acknowledgment Sign Dt field.
16.	If the person did not previously receive the standard Patent Acknowledgement Form, select the Modified Patent Ackmnt Sign Dt check box.
17.	Use the Comments field to enter specific details or an explanation regarding the transaction. This field is referenced by the WFA Production team at UCPATH Center to gain additional information for the transaction.
18.	If necessary, scroll up to display the Job Data tab. Click the scroll bar.
19.	Click the Job Data tab. 

UCPath Task:
Initiate Renew Contingent Worker (No Position)
Template Transaction

The screenshot shows the Oracle Smart HR Transactions interface. 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 Information'. Below the header, there is a link to 'Click here to Hide Header Details'. The form displays the following information:

- Template: UC_RENW_CWR
- Effective Date: 11/26/2018
- Employee ID: 10002733
- Name: Joel Martella
- Action/Action Reason: RNW/RNW (Contingent Worker Renewal)
- Employee Record:

The form is divided into several sections:

- Personal Data** (selected) and **Job Data**
- Employee Information**
 - Work Location - Job Fields**: *Business Unit, *Department, *Location Code
 - Job Information - Job Code**: Job Code
 - Job Information - Reporting Information**: Reports To Position Number
 - Job Information - Employee Classification**: *Employee Classification
 - Job Information - Standard Hours**: FTE
 - Work Location - Expected Job End Date**: Expected Job End Date
 - Comments**

Step	Action
20.	For CWRs, you must enter the appropriate Business Unit, Department, Location and Job Code field values. Click in the Business Unit field.
21.	Enter the desired information into the Business Unit field.
22.	Click in the Department field. <input type="text"/>
23.	Enter the desired information into the Department field.
24.	Click in the Location Code field. <input type="text"/>
25.	Enter the desired information into the Location Code field.
26.	Click in the Job Code field. <input type="text"/>

Step	Action
27.	Valid CWR job codes begin with CWR. For example, CWR001 . Enter the desired information into the Job Code field.
28.	Click in the Reports To Position Number field. <input data-bbox="391 470 610 506" type="text"/>
29.	Enter the desired information into the Reports To Position Number field.
30.	Click in the Employee Classification field. <input data-bbox="391 653 610 688" type="text"/>
31.	Enter the desired information into the Employee Classification field. Enter 13 for staff CWRs and 14 for academic CWRs.
32.	Click in the FTE field. <input data-bbox="391 877 610 913" type="text"/>
33.	Enter the desired information into the FTE field. For this example,
34.	Scroll down to display additional fields and page functions. Click the scroll bar.
35.	Click in the Expected Job End Date field. <input data-bbox="391 1146 610 1182" type="text"/>
36.	In the Expected Job End Date field, enter the date on which employment is scheduled to end. This date must be greater than the transaction effective date.
37.	Use the Supporting documents link to attach supporting documents as necessary.
38.	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. You can enter Initiator Comments on either tab within this template.

UCPath Task:
Initiate Renew Contingent Worker (No Position)
Template Transaction

Work Location - Job Fields
 *Business Unit UCOP1
 *Department UNIVERSITY
 *Location Code KAISER

Job Information - Job Code
 Job Code CWR006

Job Information - Reporting Information
 Reports To Position Number 40000003

Job Information - Employee Classification
 *Employee Classification 13

Job Information - Standard Hours
 FTE 0.000000

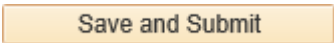
Work Location - Expected Job End Date
 Expected Job End Date 03/29/2019

Comments
 Comments

Return to Enter Transaction Details Page
 Save and Submit Save for Later Cancel Supporting documents

Transaction ID: NEW
 Initiator Comments:

Step	Action
39.	Click the Save and Submit button.




Smart HR Transactions
 Select an Action

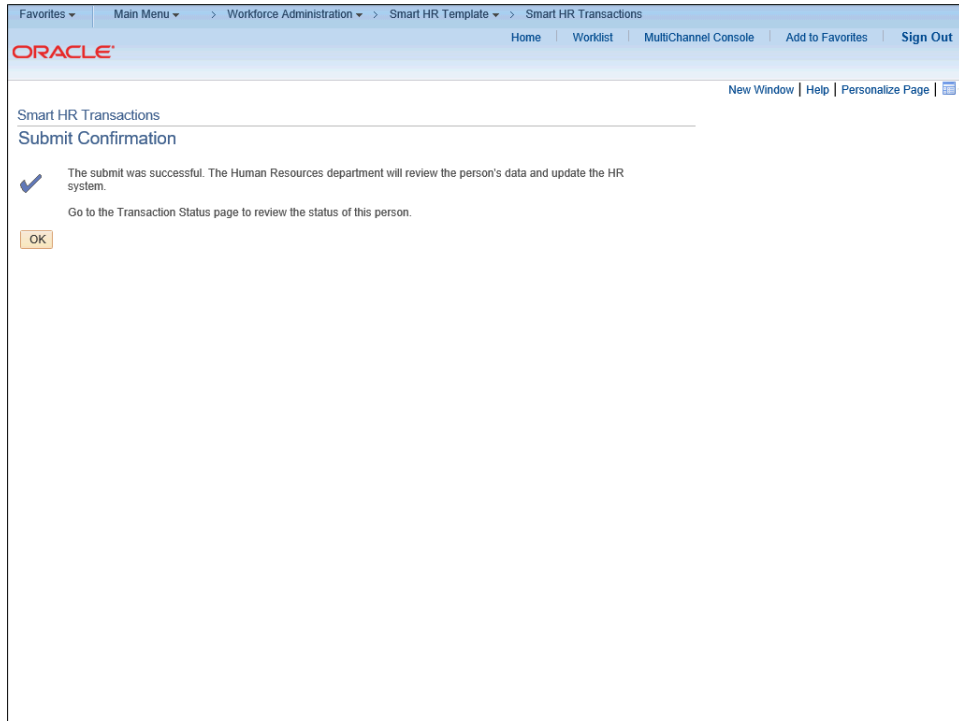
Name: Joel Martella


! This person already exists in the Human Resources system. You must decide what action should be used to hire this person into the system.
 Search for Matching Persons found this person has one or more inactive Employee Instances in the system.

Person Org Summary
 Select an Action
 Select an Existing Contingent Worker Instance with an Action of Renewal. Instance # 0

Edit Transaction Details
 Save and Submit Save for Later Cancel

Step	Action
40.	<p>The system displays the Select an Action page.</p> <p>If the person has only one inactive employee record (instance) within your business unit, then that number is defaulted. If the person has more than one inactive employee record within your business unit, then the lowest number is defaulted. Select the instance that you are renewing.</p>
41.	<p>Click the Save and Submit button.</p> 



Step	Action
42.	<p>Click the OK button.</p> 

UCPath Task:
Initiate Renew Contingent Worker (No Position)
Template Transaction

The screenshot shows the Oracle Smart HR Transactions interface. At the top, there is a navigation bar with 'Favorites', 'Main Menu', 'Workforce Administration', 'Smart HR Template', and 'Smart HR Transactions'. Below this is the Oracle logo and navigation links like 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign Out'. The main heading is 'Smart HR Transactions' with a sub-heading 'Select a template and press Create Transaction.' Below this is a 'Transaction Template' section with a dropdown for 'Transaction Type' (set to 'All'), a search box for 'Select Template', and an 'Effective Date' field. A 'Create Transaction' button is present. Below the template section is another 'Transaction Type' dropdown and a 'Refresh' button. The main part of the interface is a table titled 'Transactions in Progress' with columns: Select, Transaction Type, Effective Date, Name, Person ID, Action, and Country. The table contains four rows of data. Below the table are buttons for 'Delete Selected Transactions' and 'Go To Transaction Status'.

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	HIREJPM	11/13/2018	Ignacio Perro	NEW	Add CWR	United States
<input type="checkbox"/>	JOB	12/01/2018	Anthony Crawford	10033338	Completion CWR	United States
<input type="checkbox"/>	JOB	12/01/2018	Arteen Small	10029452	Completion CWR	United States
<input type="checkbox"/>	HIREJPM	11/26/2018	Joel Martella	10002733	Renewal	United States

Step	Action
43.	The template transaction is routed for approval and appears in the Transactions in Progress section until it is processed.
44.	You have initiated a renew contingent worker (no position) template transaction. End of Procedure.