Viewing Related Content

When creating template-based transactions (TBTs), you can view related information and run relevant queries from the Related Content menu at the top-right corner of the window (shown below).

To view related content, click the Related Content menu to display a list of options, including Position Information, Position Funding, Transaction Query, Transaction Status, Job List queries, and Contract Crosswalk Query.

After selecting a menu item, the area displaying related content expands to display all options. You can modify the display of these options in the following ways:

- **Collapse Related Content.**
- **Click settings to expand or minimize a section.**
- **Drag borders to resize columns.**
- **Display related content in a new window.**

**Tip:** Related Content displays the same as when you last closed it. You may want to minimize each section before closing the related content, if you want it to see only a selected option next time.
Viewing Position Information

Enter search parameters and click Search.

![Image of CU Position Summary with search criteria]

HCM displays your results:

![Image of CU Position Summary with search results]

Note: Click this icon to expand all fields.

Viewing Position Funding

Enter search parameters and click Search.

![Image of CU Position Funding History with search criteria]
HCM displays your results:

Running the Transaction Query

The transaction query displays all transactions within your role level security.

1. Enter search parameters or the Request ID or Template ID and click View Results:
2. From the results, click a link under Applicant Name for more information:

![HCM Table]

The Manage Hire Details page appears, providing the following links to more information:

- View Template
- Person Organizational Summary
- View/Edit Personal Data
- View/Edit Job Data
Viewing Transaction Status

Transaction status only displays your transactions. To see transactions within your role-level security, run the transaction query.

1. Enter search parameters (update the effective date range).
2. Click Refresh.

The Transaction Status table lists your transaction requests. To see a list of approvers, right-click a Related Actions indicator, and select View Approval Chain.

Or, to search for transaction status by Request ID:

1. From the NavBar: Navigator, click Workforce Administration.
2. Click Template Based Transactions.
3. Click CU TBT Approval Status. The CU TBT Approval Status window appears.

4. From the Search by list, select Request ID and type the request ID number.
5. Click Search.

Running Job List Queries

The following job list queries are available from the Related Content menu:

- **Job List**: Returns most recent job data for each employee record and most recent POI data for each POI type.
- **Job List (Future)**: Returns data for employees with future dates rows in Job Data, including newly hired employees that do not appear in Job List results.

Enter search parameters and click View Results.
Running the Contract Crosswalk Query

1. Enter Business Unit and/or Employee Group and click View Results:

A table of the Contract Crosswalk information is displayed:

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Employee Group</th>
<th>Contract Term</th>
<th>Pay Type</th>
<th>Pyrm Term</th>
<th>Monthly Frequency</th>
<th>Calc Method</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Eff Date</th>
<th>Pyrm Begin</th>
<th>Pyrm End</th>
<th>School Schedule</th>
<th>Daily Hrs</th>
<th>Pay Prd Hr</th>
<th>Assign Hrs</th>
<th>Annulize Opt</th>
<th>Ann Ty Prd</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 UCB</td>
<td>Student</td>
<td>Other</td>
<td>Pay</td>
<td>Over 3m</td>
<td>M</td>
<td>Actual</td>
<td>01/01/2018</td>
<td>05/15/2018</td>
<td>01/01/2018</td>
<td>05/15/2018</td>
<td>8.60</td>
<td>0.00</td>
<td>All Earnings (Contract+PNE+ENP)</td>
<td>Annualize</td>
<td>Over 12 months</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>2 UCB</td>
<td>Faculty</td>
<td>Spring</td>
<td>Pay</td>
<td>Over 3m</td>
<td>M</td>
<td>Actual</td>
<td>01/08/2018</td>
<td>05/31/2018</td>
<td>01/08/2018</td>
<td>05/31/2018</td>
<td>8.60</td>
<td>0.00</td>
<td>All Earnings (Contract+PNE+ENP)</td>
<td>Annualize</td>
<td>Over 12 months</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>3 UCB</td>
<td>Faculty</td>
<td>Maymester</td>
<td>Pay</td>
<td>Over Con</td>
<td>M</td>
<td>Actual</td>
<td>05/14/2018</td>
<td>08/04/2018</td>
<td>05/14/2018</td>
<td>05/14/2018</td>
<td>8.60</td>
<td>0.00</td>
<td>All Earnings (Contract+PNE+ENP)</td>
<td>Annualize</td>
<td>Over 12 months</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>4 UCB</td>
<td>Student</td>
<td>Maymester</td>
<td>Pay</td>
<td>Over Con</td>
<td>M</td>
<td>Actual</td>
<td>05/14/2018</td>
<td>08/04/2018</td>
<td>05/14/2018</td>
<td>05/14/2018</td>
<td>8.60</td>
<td>0.00</td>
<td>All Earnings (Contract+PNE+ENP)</td>
<td>Annualize</td>
<td>Over 12 months</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>5 UCB</td>
<td>Faculty</td>
<td>Summer A</td>
<td>Pay</td>
<td>Over Con</td>
<td>M</td>
<td>Actual</td>
<td>06/04/2018</td>
<td>07/06/2018</td>
<td>06/04/2018</td>
<td>07/06/2018</td>
<td>8.60</td>
<td>0.00</td>
<td>All Earnings (Contract+PNE+ENP)</td>
<td>Annualize</td>
<td>Over 12 months</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>6 UCB</td>
<td>Faculty</td>
<td>Session C</td>
<td>Pay</td>
<td>Over Con</td>
<td>M</td>
<td>Actual</td>
<td>06/04/2018</td>
<td>07/27/2018</td>
<td>06/04/2018</td>
<td>07/27/2018</td>
<td>8.60</td>
<td>0.00</td>
<td>All Earnings (Contract+PNE+ENP)</td>
<td>Annualize</td>
<td>Over 12 months</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>7 UCB</td>
<td>Faculty</td>
<td>Session D</td>
<td>Pay</td>
<td>Over Con</td>
<td>M</td>
<td>Actual</td>
<td>06/04/2018</td>
<td>08/10/2018</td>
<td>06/04/2018</td>
<td>08/10/2018</td>
<td>8.60</td>
<td>0.00</td>
<td>All Earnings (Contract+PNE+ENP)</td>
<td>Annualize</td>
<td>Over 12 months</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>