University of Colorado
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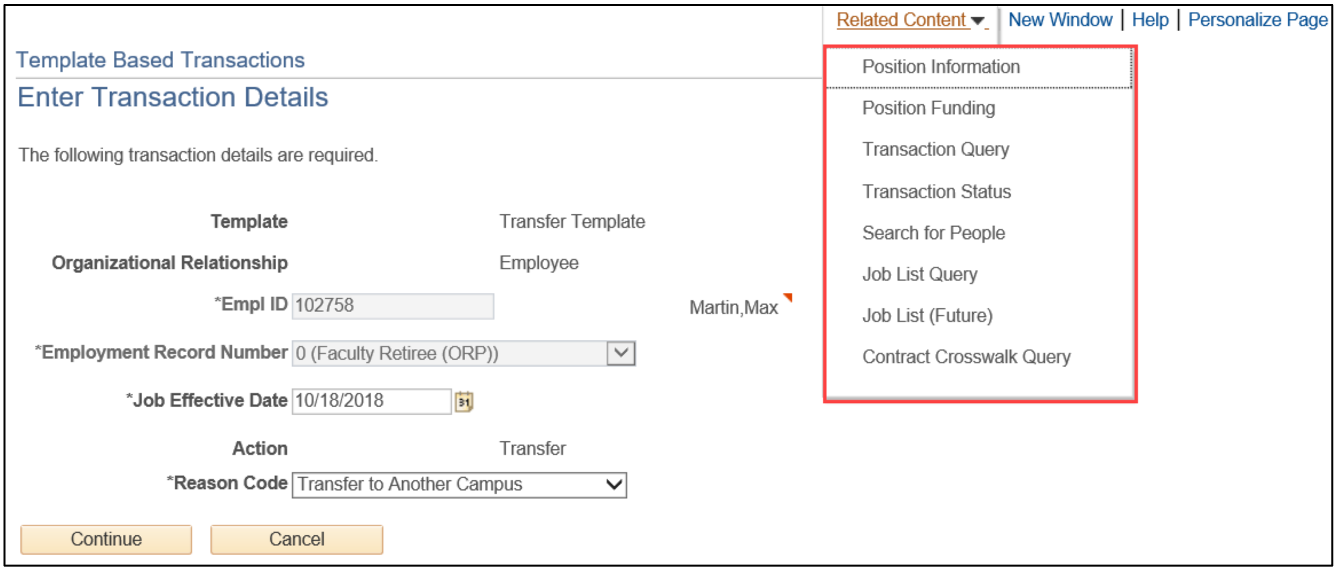
EMPLOYEE SERVICES

Human Capital Management: Step-by-Step Guide

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.



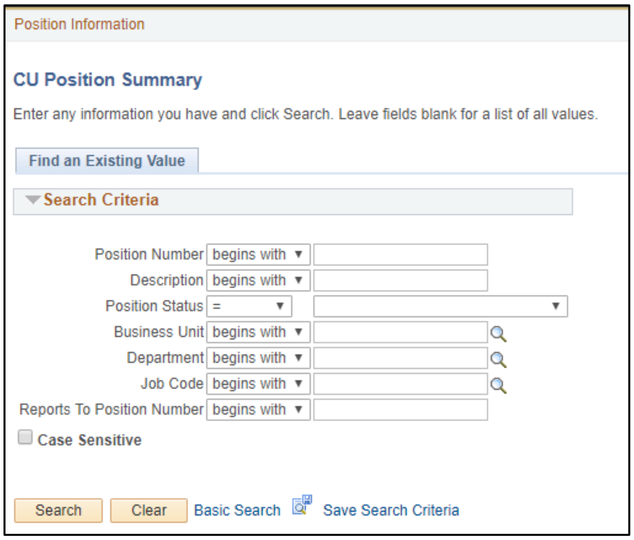
After selecting a menu item, the area displaying related content expands to display all options. You can modify the display of these options in the following ways:

	Collapse Related Content.
	Click settings to expand or minimize a section.
	Drag borders to resize columns.
New Window	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**.


Position Information

CU Position Summary

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

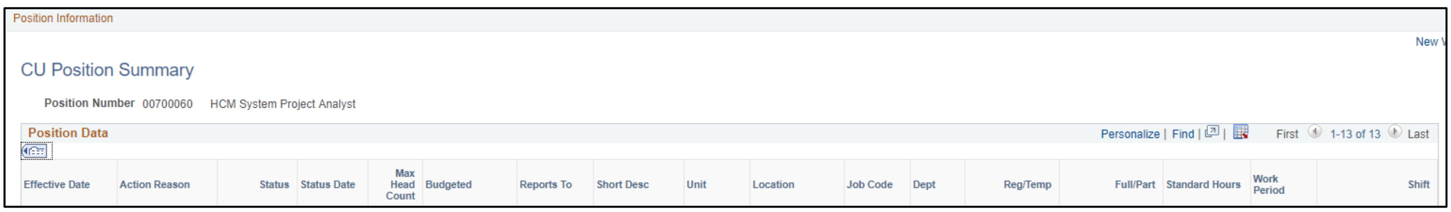
Search Criteria

Position Number begins with
Description begins with
Position Status =
Business Unit begins with
Department begins with
Job Code begins with
Reports To Position Number begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

HCM displays your results:


Position Information

CU Position Summary

Position Number 00700060 HCM System Project Analyst

Position Data

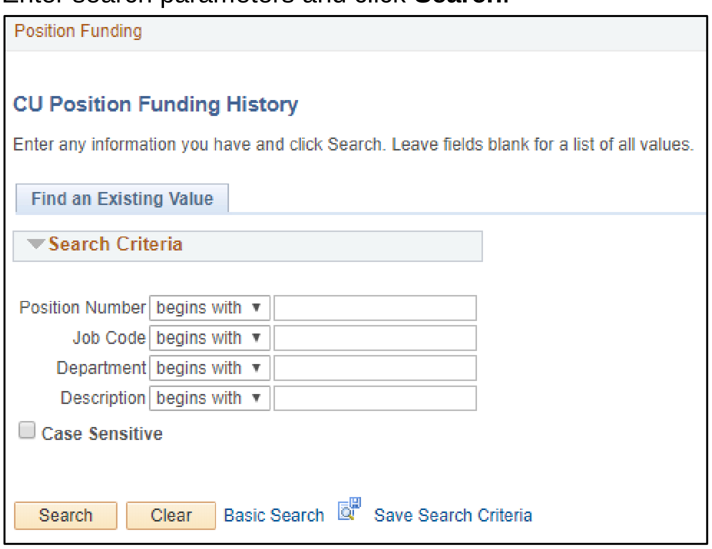
Personalize | Find | First 1-13 of 13 Last

Effective Date	Action Reason	Status	Status Date	Max Head Count	Budgeted	Reports To	Short Desc	Unit	Location	Job Code	Dept	Reg/Temp	Full/Part	Standard Hours	Work Period	Shift

Note: Click this icon  to expand all fields.

Viewing Position Funding

Enter search parameters and click **Search**.


Position Funding

CU Position Funding History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

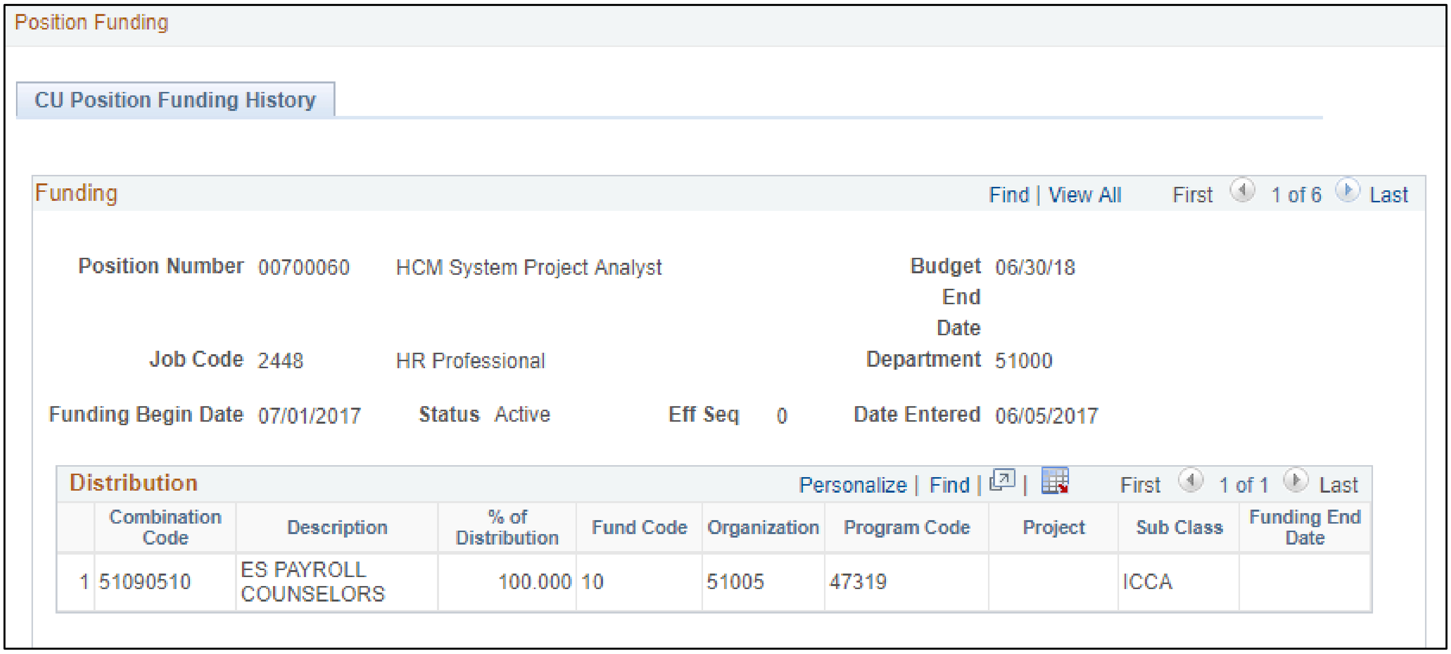
Search Criteria

Position Number begins with
Job Code begins with
Department begins with
Description begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

HCM displays your results:


Position Funding

CU Position Funding History

Funding — Find | View All — First 1 of 6 Last

Position Number 00700060 HCM System Project Analyst

Budget End Date 06/30/18

Job Code 2448 HR Professional

Department 51000

Funding Begin Date 07/01/2017 Status Active Eff Seq 0 Date Entered 06/05/2017

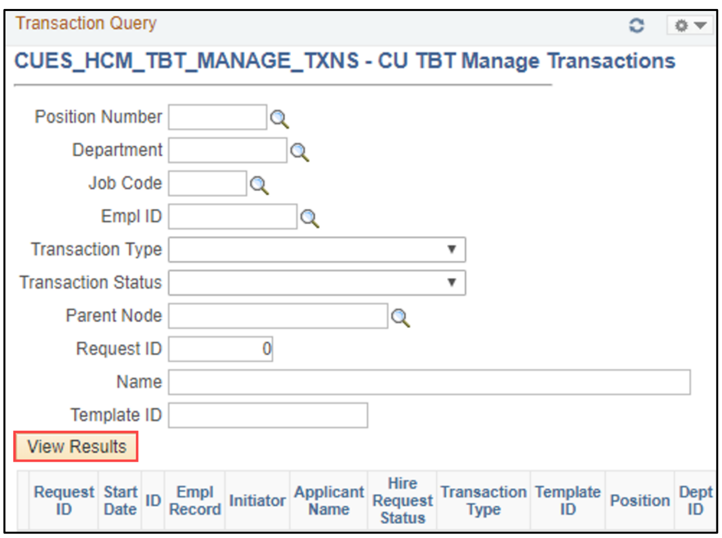
Distribution — Personalize | Find | First 1 of 1 Last

	Combination Code	Description	% of Distribution	Fund Code	Organization	Program Code	Project	Sub Class	Funding End Date
1	51090510	ES PAYROLL COUNSELORS	100.000	10	51005	47319		ICCA	

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**:


Transaction Query

CUES_HCM_TBT_MANAGE_TXNS - CU TBT Manage Transactions

Position Number

Department

Job Code

Empl ID

Transaction Type

Transaction Status

Parent Node

Request ID 0

Name

Template ID

View Results

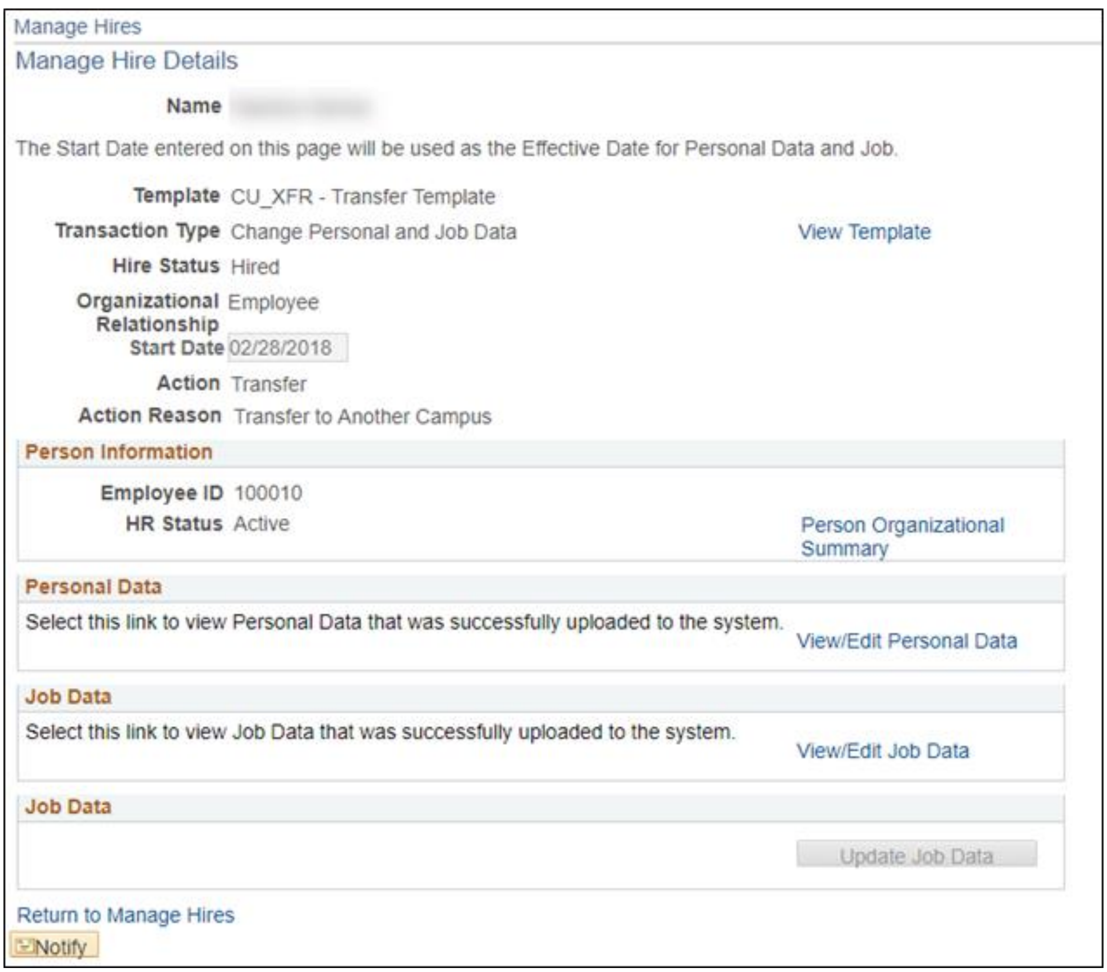
Request ID	Start Date	ID	Empl Record	Initiator	Applicant Name	Hire Request Status	Transaction Type	Template ID	Position	Dept ID

2. From the results, click a link under Applicant Name for more information:

	Request ID	Start Date	ID	Empl Record	Initiator	Applicant Name	Hire Request Status	Transaction Type	Template ID	Position	Dept ID	Job Code
1	5892	05/14/2018	[illegible]	0	Judith Bean	[illegible]	Hired	Change Personal and Job Data	CU_XFR	00732462	10001	P1A1XX
2	6180	06/01/2018	[illegible]	0	David Orozco	[illegible]	Hired	Change Personal and Job Data	CU_XFR	00742986	10004	2467
3	6500	07/05/2018	[illegible]	0	Kaitlyn Varner	[illegible]	Hired	Change Personal and Job Data	CU_XFR	00745070	10018	2407
4	5938	06/01/2018	[illegible]	3	Heather Savino	[illegible]	Cancel	Change Personal and Job Data	CU_XFR	00745991	10031	2210
5	5925	06/01/2018	[illegible]	3	Arturo Morales	[illegible]	Hired	Change Personal and Job Data	CU_XFR	00745991	10031	2210

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


Manage Hires
Manage Hire Details
Name [illegible]
The Start Date entered on this page will be used as the Effective Date for Personal Data and Job.
Template CU_XFR - Transfer Template
Transaction Type Change Personal and Job Data View Template
Hire Status Hired
Organizational Relationship Employee
Start Date 02/28/2018
Action Transfer
Action Reason Transfer to Another Campus
Person Information
Employee ID 100010
HR Status Active Person Organizational Summary
Personal Data
Select this link to view Personal Data that was successfully uploaded to the system. View/Edit Personal Data
Job Data
Select this link to view Job Data that was successfully uploaded to the system. View/Edit Job Data
Job Data
Update Job Data
Return to Manage Hires
Notify

Viewing Transaction Status

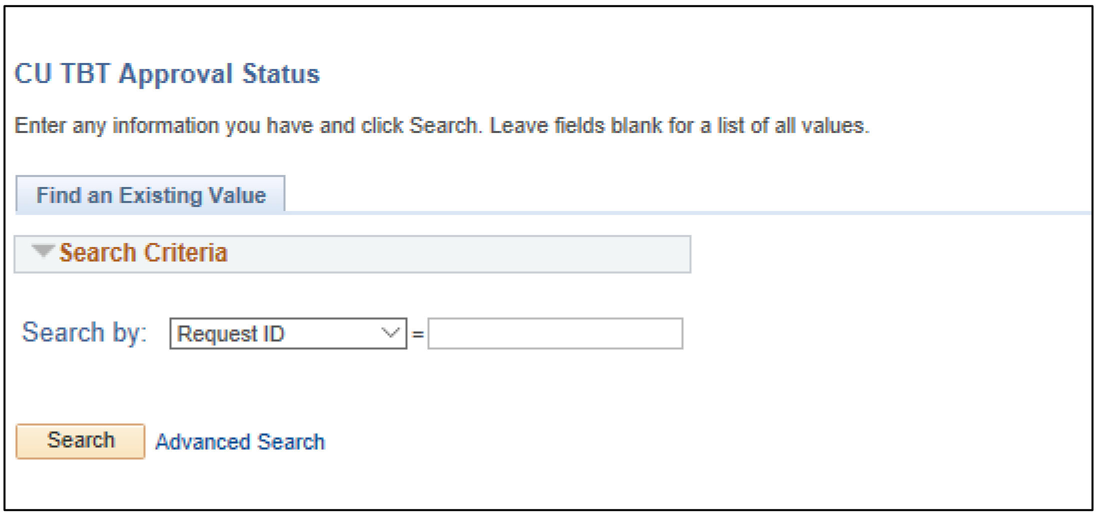
Transaction status only displays your transactions. To see transactions within your role-level security, run the transaction query.

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

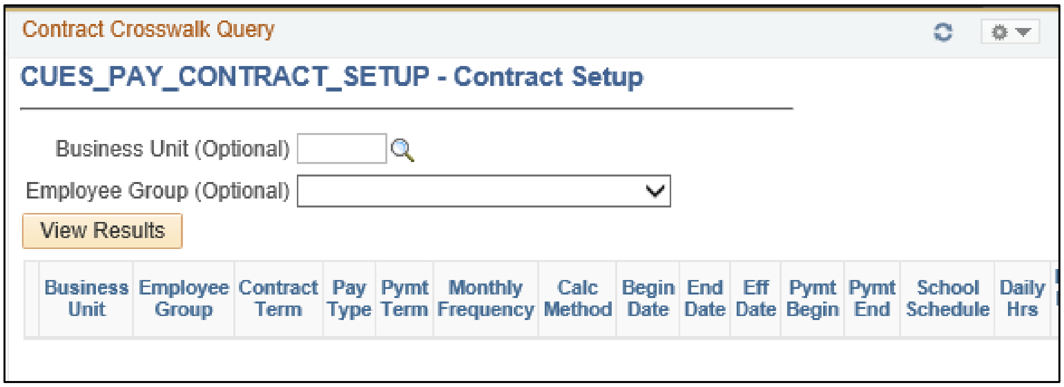
The following job list queries are available from the Related Content menu:

- **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:

View All — First 1-25 of 25 Last

	Business Unit	Employee Group	Contract Term	Pay Type	Pymt Term	Monthly Frequency	Calc Method	Begin Date	End Date	Eff Date	Pymt Begin	Pymt End	School Schedule	Daily Hrs	Pay Prd Hr	Assgn Hrs	Annualize Optn	Ann Tx Prd
1	UCB	Student	Other	Other/X	Pay over 'X' months	M	Actual	01/01/2018	05/15/2018	01/01/2018	01/01/2018	05/15/2018		8.00	0.00	All Earnings (Contract+PNE+ENP)	Annualize Over 12 months	0.00
2	UCB	Faculty	Spring	Spring	Pay over 'X' months	M	Actual	01/08/2018	05/31/2018	01/08/2018	01/08/2018	05/31/2018		8.00	0.00	All Earnings (Contract+PNE+ENP)	Annualize Over 12 months	0.00
3	UCB	Faculty	Maymester	Oth/Cont	Pay Over Contract	M	Actual	05/14/2018	06/01/2018	05/14/2018	05/14/2018	06/01/2018		8.00	0.00	All Earnings (Contract+PNE+ENP)	Annualize Over 12 months	0.00
4	UCB	Student	Maymester	Oth/Cont	Pay Over Contract	M	Actual	05/14/2018	06/01/2018	05/14/2018	05/14/2018	06/01/2018		8.00	0.00	All Earnings (Contract+PNE+ENP)	Annualize Over 12 months	0.00
5	UCB	Faculty	Session A	Oth/Cont	Pay Over Contract	M	Actual	06/04/2018	07/06/2018	06/04/2018	06/04/2018	07/06/2018		8.00	0.00	All Earnings (Contract+PNE+ENP)	Annualize Over 12 months	0.00
6	UCB	Faculty	Session C	Oth/Cont	Pay Over Contract	M	Actual	06/04/2018	07/27/2018	06/04/2018	06/04/2018	07/27/2018		8.00	0.00	All Earnings (Contract+PNE+ENP)	Annualize Over 12 months	0.00
7	UCB	Faculty	Session D	Oth/Cont	Pay Over Contract	M	Actual	06/04/2018	08/10/2018	06/04/2018	06/04/2018	08/10/2018		8.00	0.00	All Earnings (Contract+PNE+ENP)	Annualize Over 12 months	0.00