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HCM development: Take your first look at Related Action and Related Content [1]

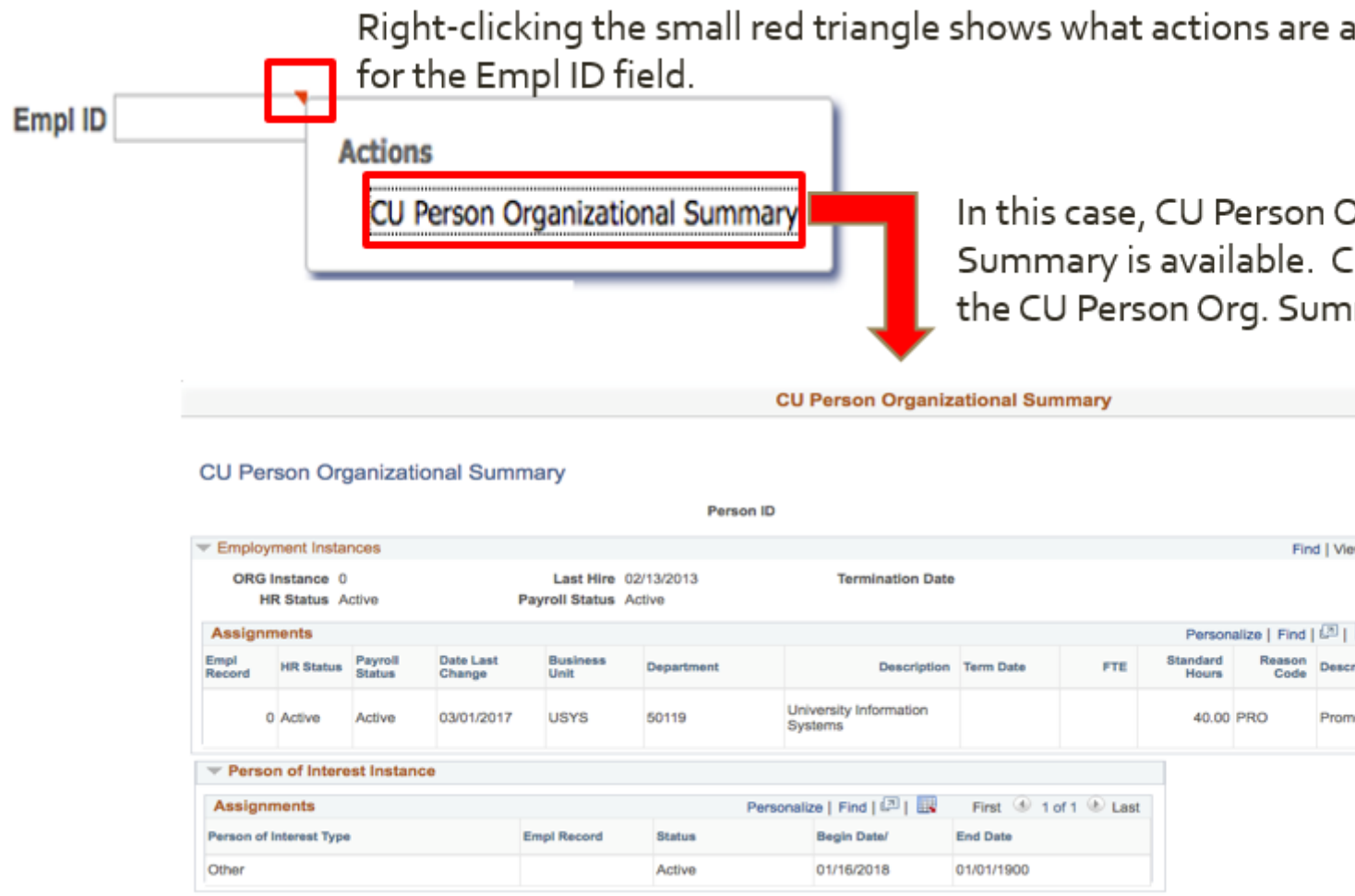
March 15, 2018 by Employee Services [2]

On **April 14**, the Template Based Transaction (TBT) framework [3] will replace Smart ePAR for Transfer transactions and two new functionalities, **Related Action** and **Related Content**, will be implemented.

What are Related Action and Related Content?

In general, Related Actions and Related Content is associated with delivered PeopleSoft and Template Based Transaction pages. This functionality will be used to enable users to view important information they may need while completing POI and Transfer transactions. This lessens the number of windows users need to open, letting them see all of the information they need on one screen. Learn more about each function below.

Related Action
With Related Action, important information related to a specific field on the page can be made available by right clicking on the small red triangle. For example, users will be able to view a transferring employee's **CU Person Organizational Summary**:



[4]

Related Content
Related Content is a drop-down menu link associated with the top of delivered PeopleSoft and transaction pages, where users can view:

- **Position Information** and **Position Funding**. When either of these are selected, search options are displayed so users can view information about a specific position.
- A **Transaction Query**. This query lets users search for a specific position and view transaction details related to that position and hire transaction.



[5]

Learn more with webinars and structured labs

Prepare for upcoming changes [6] by attending webinars and structured labs on your campus.

Webinars

Two webinars covering Transfer and POI updates will be offered from **9:30 a.m. – noon April 2**. Attendance is recommended, but not required. If you would like to participate, please register below.

Person of Interest Webinar	Transferring an Employee Webinar
Description: Review the new process for adding a POI using delivered PeopleSoft functionality.	**Description:** Review the new process for transferring an employee using a Template Based Transaction.
Time: 9:30 - 10:30 a.m.	**Time:** 11:00 a.m. - noon
Register [7]	Register [8]

Structured labs

From **April 9-12**, engage with experts during structured labs. **Note:** Boulder and Denver | Anschutz users are required to attend structured labs.

Visit the HCM Projects webpage [9] to view full schedules and registration instructions.

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