

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.

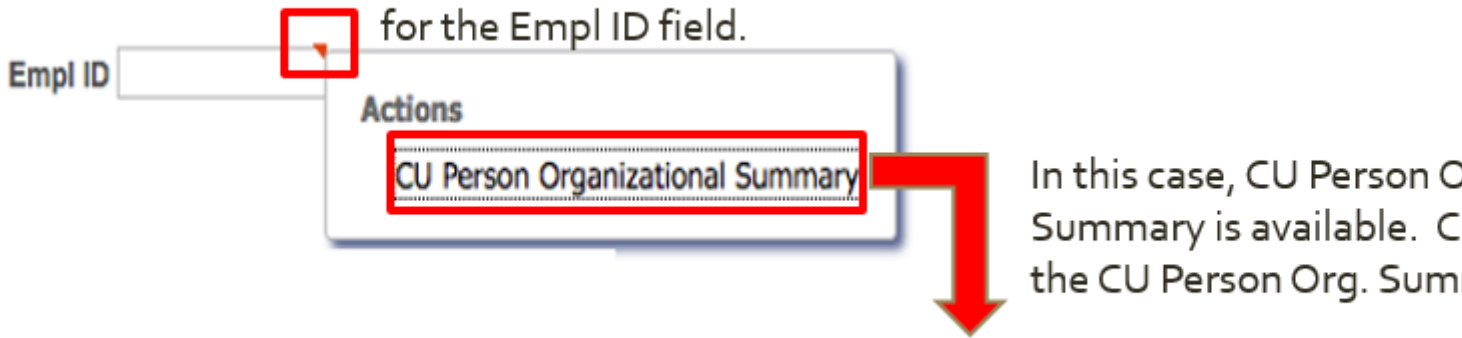
What are Related Action and Related Content?

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**:

Right-clicking the small red triangle shows what actions are available for the Empl ID field.



CU Person Organizational Summary

CU Person Organizational Summary

Person ID

Employment Instances												Find View
ORG Instance 0			Last Hire 02/13/2013			Termination Date						
HR Status Active			Payroll Status Active									
Assignments												Personalize Find [?]
Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Department	Description	Term Date	FTE	Standard Hours	Reason Code	Description	
0	Active	Active	03/01/2017	USYS	50119	University Information Systems			40.00	PRO	Prom	

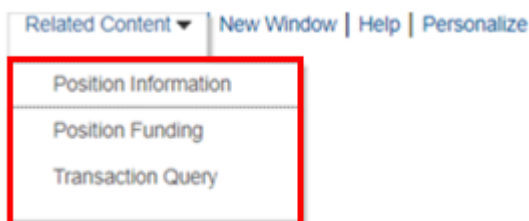
Person of Interest Instance					
Assignments					Personalize Find [?] [?] First 1 of 1 Last
Person of Interest Type	Empl Record	Status	Begin Date/	End Date	
Other		Active	01/16/2018	01/01/1900	

[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

Description: Review the new process for adding a POI using delivered PeopleSoft functionality.

Time: 9:30 - 10:30 a.m.

[Register](#) [7]

Transferring an Employee Webinar

Description: Review the new process for transferring an employee using a Template Based Transaction.

Time: 11:00 a.m. - noon

[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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