



University of Connecticut

Cancelling a Smart HR Transaction

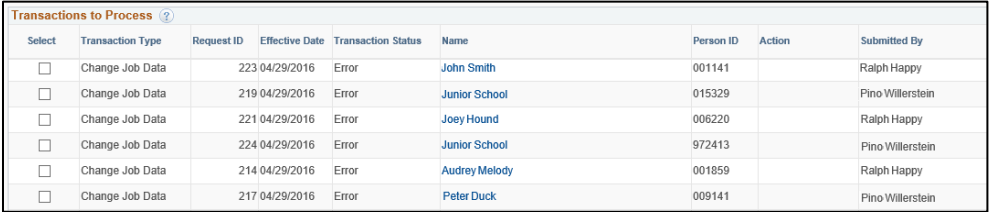
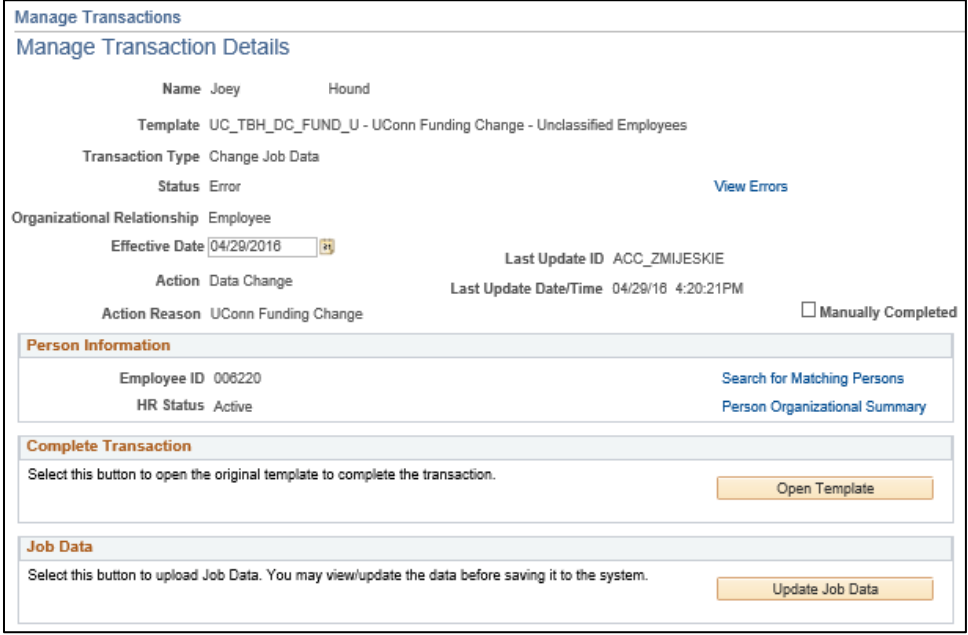
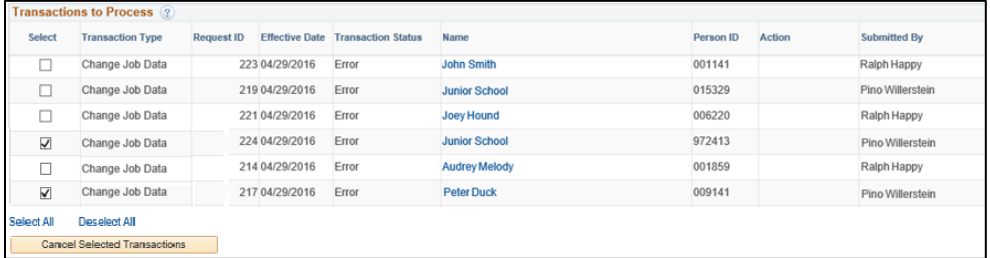
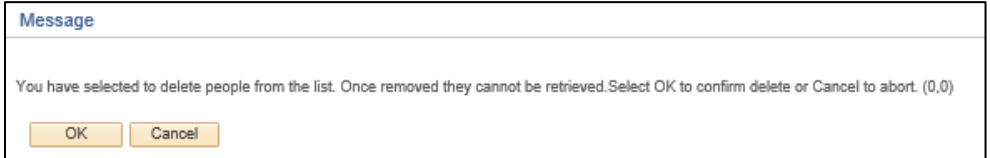
Overview

Department Processors are able to cancel Smart HR transactions using the **Manage Transactions** page. However, if the transaction was already approved and pushed to Job Data, the transaction cannot be cancelled using this method.

To cancel a transaction that has already been pushed to Job Data, contact the **Payroll Department** for further instructions. A new Smart HR template may need to be submitted negating the transaction.

Process Steps

Step	Action	Screenshot
1	Navigation: Main Menu > Core-CT HRMS > Workforce Administration > Smart HR Template > Manage Transactions	
2	<p>On the Manage Transactions page, filter by Transaction Type or Transaction Status. Or, search by the Employee ID or Employee Name.</p> <p>If the Effective Dates fall outside of the defaulted From and To dates, adjust the dates accordingly. Then click Refresh.</p>	<p>The screenshot shows the 'Manage Transactions' interface. It includes a title 'Manage Transactions' and a subtitle 'The following people have transactions ready to be processed.' Below this are several filter fields: '*Transaction Type' (dropdown menu set to 'All'), '*Transaction Status' (dropdown menu set to 'All'), 'Employee ID' (text input with search icon), 'Employee Name' (text input with search icon), 'Effective Date From' (calendar icon set to 04/29/2016), 'To' (calendar icon set to 05/19/2016), and 'Template' (dropdown menu). A 'Refresh' button is located at the bottom of the filter section.</p>

Step	Action	Screenshot																																																															
3	Review the search results under the Transactions to Process section of the page.	 <table border="1"> <thead> <tr> <th>Select</th> <th>Transaction Type</th> <th>Request ID</th> <th>Effective Date</th> <th>Transaction Status</th> <th>Name</th> <th>Person ID</th> <th>Action</th> <th>Submitted By</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>223</td> <td>04/29/2016</td> <td>Error</td> <td>John Smith</td> <td>001141</td> <td></td> <td>Ralph Happy</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>219</td> <td>04/29/2016</td> <td>Error</td> <td>Junior School</td> <td>015329</td> <td></td> <td>Pino Willerstein</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>221</td> <td>04/29/2016</td> <td>Error</td> <td>Joey Hound</td> <td>006220</td> <td></td> <td>Ralph Happy</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>224</td> <td>04/29/2016</td> <td>Error</td> <td>Junior School</td> <td>972413</td> <td></td> <td>Pino Willerstein</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>214</td> <td>04/29/2016</td> <td>Error</td> <td>Audrey Melody</td> <td>001859</td> <td></td> <td>Ralph Happy</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>217</td> <td>04/29/2016</td> <td>Error</td> <td>Peter Duck</td> <td>009141</td> <td></td> <td>Pino Willerstein</td> </tr> </tbody> </table>	Select	Transaction Type	Request ID	Effective Date	Transaction Status	Name	Person ID	Action	Submitted By	<input type="checkbox"/>	Change Job Data	223	04/29/2016	Error	John Smith	001141		Ralph Happy	<input type="checkbox"/>	Change Job Data	219	04/29/2016	Error	Junior School	015329		Pino Willerstein	<input type="checkbox"/>	Change Job Data	221	04/29/2016	Error	Joey Hound	006220		Ralph Happy	<input type="checkbox"/>	Change Job Data	224	04/29/2016	Error	Junior School	972413		Pino Willerstein	<input type="checkbox"/>	Change Job Data	214	04/29/2016	Error	Audrey Melody	001859		Ralph Happy	<input type="checkbox"/>	Change Job Data	217	04/29/2016	Error	Peter Duck	009141		Pino Willerstein
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4	Click on an employee's Name to view additional information about the transactions on the Manage Transactions Details page. Ensure the transaction selected is the one being cancelled. Then, click Return to Manage Transactions .	 <p>Manage Transactions Manage Transaction Details</p> <p>Name: Joey Hound Template: UC_TBH_DC_FUND_U - UConn Funding Change - Unclassified Employees Transaction Type: Change Job Data Status: Error View Errors Organizational Relationship: Employee Effective Date: 04/29/2016 Action: Data Change Action Reason: UConn Funding Change Last Update ID: ACC_ZMIJESKIE Last Update Date/Time: 04/29/16 4:20:21PM <input type="checkbox"/> Manually Completed</p> <p>Person Information</p> <p>Employee ID: 006220 Search for Matching Persons HR Status: Active Person Organizational Summary</p> <p>Complete Transaction</p> <p>Select this button to open the original template to complete the transaction. Open Template</p> <p>Job Data</p> <p>Select this button to upload Job Data. You may view/update the data before saving it to the system. Update Job Data</p>																																																															
5	Back on the Manage Transactions page, select the checkbox next to each transaction to be cancelled. You can also click Select All to select all available transactions on the page. Then, click Cancel Selected Transactions .	 <table border="1"> <thead> <tr> <th>Select</th> <th>Transaction Type</th> <th>Request ID</th> <th>Effective Date</th> <th>Transaction Status</th> <th>Name</th> <th>Person ID</th> <th>Action</th> <th>Submitted By</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>223</td> <td>04/29/2016</td> <td>Error</td> <td>John Smith</td> <td>001141</td> <td></td> <td>Ralph Happy</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>219</td> <td>04/29/2016</td> <td>Error</td> <td>Junior School</td> <td>015329</td> <td></td> <td>Pino Willerstein</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>221</td> <td>04/29/2016</td> <td>Error</td> <td>Joey Hound</td> <td>006220</td> <td></td> <td>Ralph Happy</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Change Job Data</td> <td>224</td> <td>04/29/2016</td> <td>Error</td> <td>Junior School</td> <td>972413</td> <td></td> <td>Pino Willerstein</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Change Job Data</td> <td>214</td> <td>04/29/2016</td> <td>Error</td> <td>Audrey Melody</td> <td>001859</td> <td></td> <td>Ralph Happy</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Change Job Data</td> <td>217</td> <td>04/29/2016</td> <td>Error</td> <td>Peter Duck</td> <td>009141</td> <td></td> <td>Pino Willerstein</td> </tr> </tbody> </table> <p>Select All Deselect All Cancel Selected Transactions</p>	Select	Transaction Type	Request ID	Effective Date	Transaction Status	Name	Person ID	Action	Submitted By	<input type="checkbox"/>	Change Job Data	223	04/29/2016	Error	John Smith	001141		Ralph Happy	<input type="checkbox"/>	Change Job Data	219	04/29/2016	Error	Junior School	015329		Pino Willerstein	<input type="checkbox"/>	Change Job Data	221	04/29/2016	Error	Joey Hound	006220		Ralph Happy	<input checked="" type="checkbox"/>	Change Job Data	224	04/29/2016	Error	Junior School	972413		Pino Willerstein	<input type="checkbox"/>	Change Job Data	214	04/29/2016	Error	Audrey Melody	001859		Ralph Happy	<input checked="" type="checkbox"/>	Change Job Data	217	04/29/2016	Error	Peter Duck	009141		Pino Willerstein
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6	<u>Once a transaction is cancelled it cannot be reopened.</u> A message will open when submitting the cancellation. Click OK to confirm. The transaction is now cancelled.	 <p>Message</p> <p>You have selected to delete people from the list. Once removed they cannot be retrieved. Select OK to confirm delete or Cancel to abort. (0,0)</p> <p>OK Cancel</p>																																																															