Job Aid: Manage Job - Job Data Modernization

This document outlines the processes for phase 1 of the **Manage Job** pages that are part of **Job Data Modernization**. The guidelines will assist you when making changes to:

Work Location, **Job Information**, **Labor Information**, **Salary and Compensation**, and **Payroll transactions**, **UC Job Data, and Attachments.**

Navigation: Workforce Administration > Manage Job (tile) > **Search Existing**

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PayPath vs. Manage Job

PayPath	Manage Job	No Change
System is unavailable during payroll cut-off times (component lockdown).	System is unavailable during payroll cut-off times (component lockdown).	☑
Supports retro Transactions entry.	The current phase of **Manage Job** does not support retro transactions (transactions prior to the latest effective date row).	
Transactors can enter multiple changes/entries in one transaction.	Each transaction is entered separately. **For example**: **Manage Job** entries are based on an ***Action/ *Reason.** Only select fields are enabled for entry per ***Action/ *Reason** change, and remaining fields remain disabled (grayed out). This means it may require multiple entries/changes if a transaction requires multiple fields to be updated.	
Changes/entries made at the Location go through an Approval Workflow Engine (AWE) process.	No Approval Workflow Engine (AWE) process. Changes/entries made in **Manage Job** commit to UCPath in real-time.	
Navigation: Workforce Administration > HR Tasks (tile) > PayPath/Additional Pay> **PayPath Actions.** Search results display below **Search Criteria**. Once transactor **Drills in** on a search result, to navigate back to previous search results, transactor clicks on **Return to Search** button.	**Navigation**: Workforce Administration > Manage Job (tile) > **Search Existing.** Search results display in **My Recent Searches**. Once a transactor clicks on a transaction to **View Job Details**, to go navigate back to previous search results, transactor clicks back button.	
The **Rate Code** changes require UCPath for approval.	The **Rate Code** changes do not require UCPath approval. Updates to made commit to UCPath in real-time.	

PayPath	Manage Job	No Change
When a transactor enters a **Step** in the **Step** field for a step-based position, the **Compensation Rates** amounts update automatically.	When a transactor enters a **Step** in the **Step** field for a step-based position, the transactor needs to click on the **Default Pay Components** and **Calculate Compensation** buttons for the correct salary amounts and **Pay Rates** to display as the amounts do not automatically calculate.	

Manage Job

Location transactors with the new initiator role **ULSHR_HR_MODERN_JOB_INIT** (provisioned at the location) will have access to the **Manage Job Tile** and the **Create Job Action** button enabled.

Location transactors with access to current or classic **Job Data** or with the following roles will have access to the new **Manage Job** tile.

- **ULSHR_HR_ WFA_INQUIRY**,
- **ULSHR_HR_ WFA_INQUIRY_NO_PII**
- **ULSHR_HR_JOBDATA_NO_COMP**

Note: There is no change to the existing **Job Data** page accessed through **HR Tasks**.

Click the **Manage Job** tile to navigate to the **Search Existing** component.
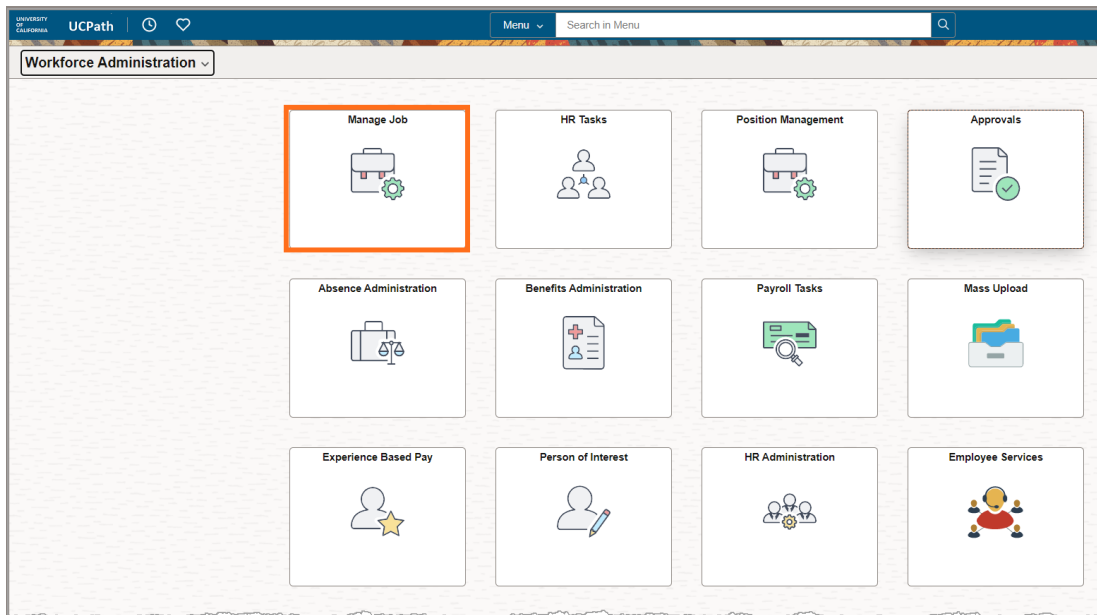
In **Manage Job**, use the **Search Existing** component to search using **Search Criteria** including:

- Empl ID
- Empl Record
- Name
- Legal Last Name
- Legal First Name
- Legal Middle Name
- HR Status
- Payroll Status
- Position Number
- Business Unit
- Department
- Job Code

Search Existing

To search for an individual person's record or an entire **Business Unit**, enter the corresponding data in the respective field. For example, you can search for a person's records using an **Empl ID**, **Name**, **Legal Last Name**, **Legal First Name**, or **Legal Middle Name**.

In addition, you can search for a person's record or Business Unit's records using a combination of search parameters including **HR Status**, **Payroll Status**, **Position Number**, **Business Unit**, **Department**, and **Job Code**.

For example, you can search for an employee using an **Empl ID**.

Enter the employee's ID in the **Empl ID** field and click the **Search** button. It is recommended that you check the **Include History** check box to include current and future job history rows. If check box is unchecked, search results will display top of the stack row.

Job Action Summary

The search results display on the **Job Action Summary** page with the current row at the top of the stack.

If you do not see the **Create Job Action** button, your location has not provisioned the new initiator role.

⚠ Transactors with the new initiator role **(ULSHR_HR_MODERN_JOB_INIT)**, will see the **Create Job Action** button and can update or make changes from **Job Action Summary**.

⚠ Transactors without the new initiator role **(ULSHR_HR_MODERN_JOB_INIT)**, **Create Job Action** button will not be visible and the results in the **Job Action Summary** page will be read-only.

Search Results

The search results display in a horizontal row beneath the **Search Criteria** component.

Legal First Name	begins with		Department	begins with		
Legal Middle Name	begins with		Job Code	begins with		

☑ Include History

[Search] [Clear] [Save Search]

Basic Search

⌄ Search Results

Empl ID:106____

1 row

Empl ID ⇅	Empl Record ⇅	Name ⇅	Legal Last Name ⇅	Legal First Name ⇅	Legal Middle Name ⇅	Payroll Status ⇅	Organizational Relationship ⇅	Position Number ⇅	Business Unit ⇅	Department ⇅	Job Code ⇅	Business Title ⇅	
106____	0					Active	Employee	40____	SDCMP	000204	002310	TEACHG ASST-GSHIP	>

To review the employee's job data row, click on the "**>**" icon to access the **Job detail** page.

Job Actions Summary

1 row

⇅

Effective Date / Sequence	Action / Reason	Last Updated By / Date	Job Code	Position	Reports To	Employee Classification	Actions		
10/01/2022	Hire		002310	409____	407____ FINANCIAL SVC ANL 2 ____	11	⊘	✎	>
0	Hire - No Prior UC Affiliation	10/01/2022	TEACHG ASST-GSHIP	TEACHG ASST-GSHIP		Academic: Academic Student			

Job Details

The **Job Details** page is in read-only view and displays employee information by category, **Work Location**, **Job Information**, **Labor Information**, **Salary and Compensation**, **Payroll**, **Employment Data**, **Benefits Program**, **UC Job Data**, **Attachments**, **Validate**, and **Summary**.

Clicking on the **Expand All** button displays all data from each category, and **Collapse All** minimizes all the categories. A user can expand or collapse each category by clicking on each category.

To navigate back to the **Job Action Summary** page, click the back button to access the search results.

To navigate back to the **Manage Job** page from the **Job Details** page, click the back button.

Save Search

To save the search previously performed, click the **Save Search** button. A pop-up window with a prompt to **Enter a New Name** displays. You can enter a name in the field, or you can click save to accept the default text.

My Saved Searches

A saved search displays in the **My Saved Searches** drop-down on the **Manage Job** page.

My Recent Searches

A list of **Recent Searches** display below the **Search Criteria** component on the **Manage Job** page.

Create Job Action

Create Job Action current phase of **Modernized Job Data** does not support entering transactions prior to the latest effective date row. This means transactors can enter current and future dated transactions. historic rows cannot be entered using **Create Job Action**.

The **Create Job Action** button is enabled for transactors granted the new initiator role (**ULSHR_HR_MODERN_JOB_INIT**) provisioned at the location.

Click the **Create Job Action** button to enter the ***Action** and ***Reason** for an employee record. The **Effective Sequence** field is grayed out and displays a number starting out with "**0**". Entries entered using Job Data Modernizations with the same **Effective Date** will be effective sequenced.

To enter the ***Action** and ***Reason** codes use the lookup function to select the appropriate ***Action** and ***Reason** code from the lookup list.

If a disallowed ***Action** is entered in the ***Action** field, a hard error will display, and the transactor cannot proceed until a correct entry is made.

Click the **Continue** button to proceed with the transaction.

Depending on the ***Action** and ***Reason** selected, the transactor will have access to data fields related to the ***Action** and ***Reason**.

Navigation in modernized job data includes activity guides.

There is no requirement to navigate sequentially or view all activity guides. Transactors can access the guides in any order and after making an entry, can **Validate** and **Submit** the transaction.

Work Location

All fields in **Work Location** are grayed out for this example where the ***Action** and ***Reason** are for **Return from Work Break** – **Return from Short Work Break**.

Click the **Next** button or click on the activity guide to advance to the **Job Information** page.

Job Information

The **Job Information** page fields are grayed out based on the ***Action** and ***Reason** used. In this example, the ***Action** and ***Reason** used was for a **Data Change (DTA)** and a **Change In Percent Time (FTE) (CPT)**, the **FTE** field.

Click the **Next** button or click on the activity guide to advance to the **Labor Information** page.

Labor Information

The **Labor information** fields are grayed out for this transaction.

Click the **Next** button or click on the activity guide to advance to the **Salary and Compensation** page.

Salary and Compensation

The **Salary and Compensation** fields are grayed out for this transaction based on the ***Action** and ***Reason** used.

For example, if the ***Action** and ***Reason** used was for a **Pay Rate Change (PAY)** and a **Step Increase/Progression (STI)**, the **Step** field, and the **Pay Components** fields would be editable and not grayed out.

If the transaction is pay related, and the position requires an adjusted **Step**, a position with .5 step increases will display the .5 Step in **UC Step**. Click the **Step** look-up icon to display the **Step** table.

For positions with .5 steps, select the corresponding **Step.** In the example below, **Step** 10 corresponds to **UC Step** 10 with an hourly **Compensation Rate** of **$41.30**.

UC Step Details

The **UC Step Details** display below the **Calculate Compensation** button.

⚠ If you make changes to the **Step** and forget to click on **Default Pay Components** and **Calculate Compensation** buttons, when you get to **Validate**, a hard stop error message will display with guidance to go to the **Salary and Compensation** page to click on **Default Pay Components** and **Calculate Compensation** buttons before submitting the entry.

Click the **Next** button or click on the activity guide to advance to the **Payroll** page.

Payroll

The **Payroll** fields are grayed out for this transaction based on the ***Action** and ***Reason** used. For example, if the ***Action** and ***Reason** used was for an **Earning Distribution Change (JED)** and a **Negotiated Comp/Summer Salary (JED)**, the **Earning Distribution** fields would be editable and not grayed out.

Earning Distribution

If the ***Action** and ***Reason** position entered is **Job Earning Distributions** (**JED**), adjust the **Earnings Distribution Type** by selecting either **By Amounts** or **By Percent**, thereby allowing for the entry of **Compensation Rates**. **Earning Distribution** is enables location transactors to edit the **Comp Rate** or remove the distribution if the **FTE** is zeroed out.
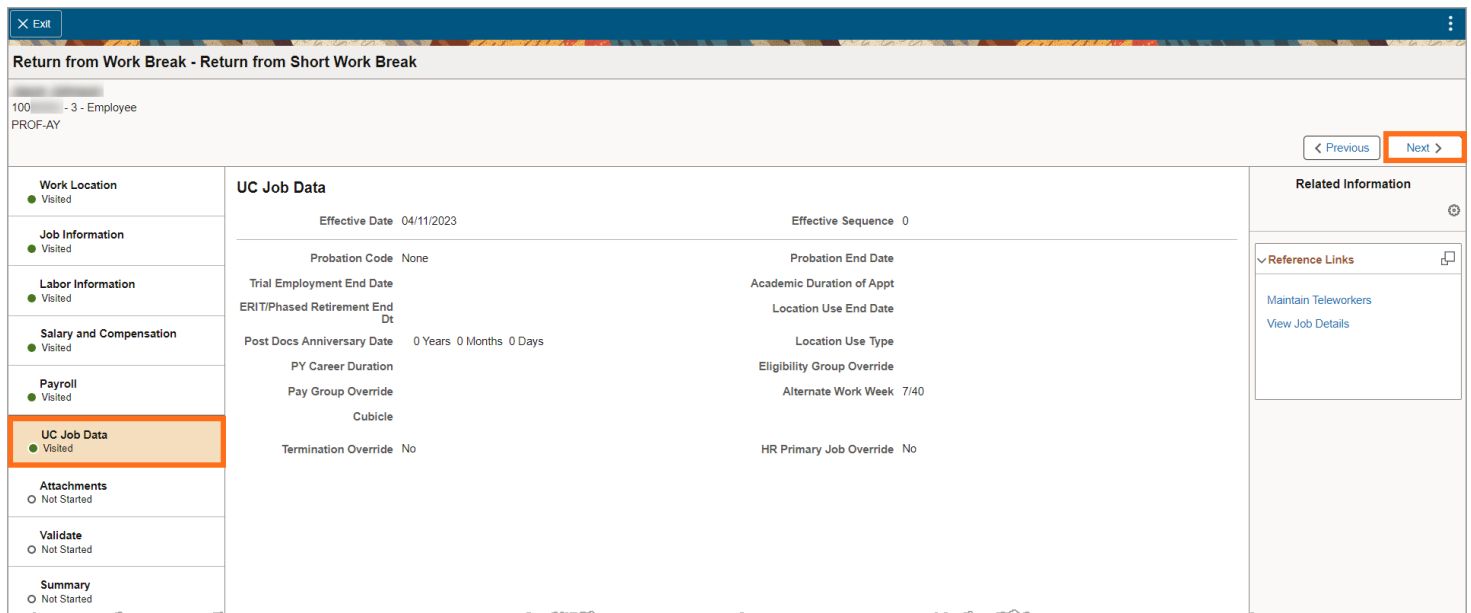
⚠️ When using Pay Path to process a transaction that modifies an employee's existing **Job Earning Distribution** (JED), for example with **Actions/Reasons Data Change/Change in Percent (FTE)**, UCPath automatically calculates the JED. In **Modernized Job Data**, the transactor must manually input the updated **Compensation Rates** amounts because the **JED** does not calculate automatically. If the transactor fails to complete this step, the transaction will trigger a hard error during validation preventing submission until it is correctly entered.

Click the **Next** button or click on the activity guide to advance to the **UC Job Data** Page.

UC Job Data

The **UC Job Data** page fields are grayed out based on the ***Action** and ***Reason** used.

Click the **Next** button or click on the activity guide to advance to the **Attachments** page.

Attachments

On the **Attachments** Page, a transactor can upload attachments. Attachments are viewable by all transactors with access to employee records.

To add an attachment, click the **Add Attachment** button.

In the File Attachment window, click **My Device** to select the file to attach.

Once a file is selected, click the **Upload** button.

The selected file will upload, and a green bar will display **Upload Complete**. Click **Done.**

Note: If the attached document's file name is too long, an upload error warning will display. This means the file name will need to be shortened and then re-uploaded.

Click the **Next** button or click on the activity guide to advance to the **Validate** page.

Validate

The **Validate** page displays warnings and errors. The system will prevent the submission of a transaction if there are any errors displayed, so it is important to correct them. Review and correct any warnings as needed, as they may have downstream impacts. It is the responsibility of the transactor to ensure that warning messages are not ignored.

Click the **Next** button or click on the activity guide to advance to the **Summary** page.

Summary

The **Summary** page displays the changes made by displaying the **Proposed Information** (the change) and **Current Information** (the current setting in the system).

⚠️ It is important to note that at this stage, any changes made have not been submitted to UCPath. Transactors should review this page to make sure that the information displayed in **Proposed Information** reflects the intended change.

Once the transactor confirms the change displayed in **Proposed Information**, click **Submit**.
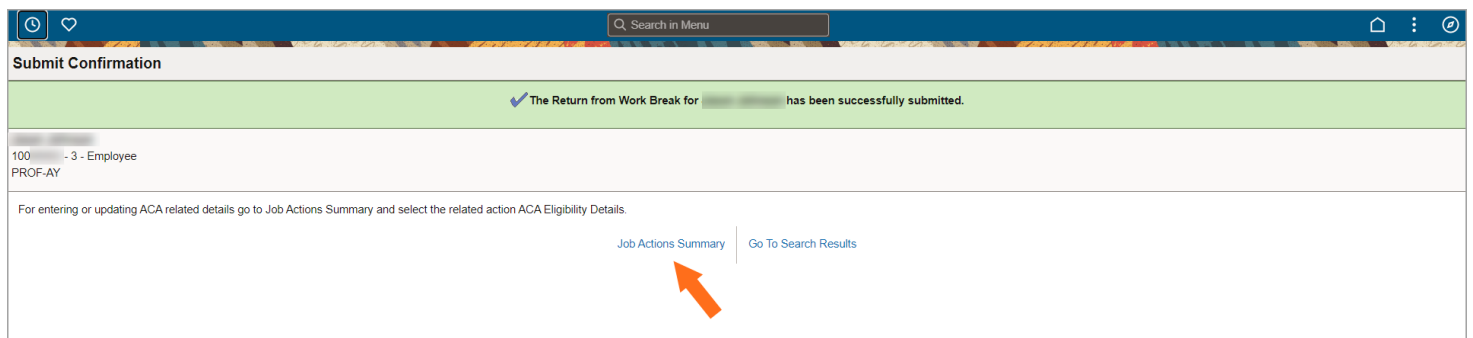
Note: A comment window will display for additional comments to be entered before submitting the transaction.

Enter the **Submission Comments** and click **Submit** to commit the change in UCPath.
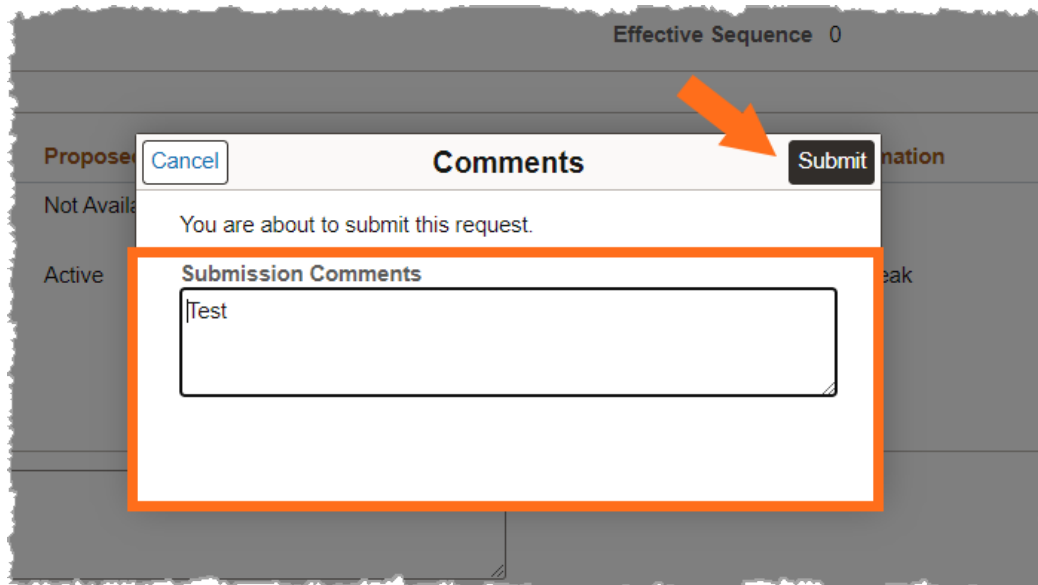
Submit Confirmation

The **Submit Confirmation** page will display. To review the newly entered transaction/row, click **Job Actions Summary** or to navigate to the search page, click on **Go To Search Results.**

Job Action Summary

The **Job Action Summary** page displays the newly entered row at the top. Click on the "**>**" icon to access the **Job detail** page.

To return to the home page, on the navigation bar click the **Home** icon.

This will direct the transactor back to UCPath PeopleSoft Homepage.