

Reference Guide

Cancel and Delete a Template-Based Hire (TBH)

Purpose:	There are specific scenarios under which you can cancel and subsequently delete a Template-Based Hire (TBH) that is no longer required.
Audience	Budget Owners and University of Calgary employees with the Reports to Manager or HR Forms Initiator security role in Human Resources PeopleSoft.
	Note: Only the person who initiated the TBH can access and cancel it.
Prerequisites:	Must be logged in to the My UCalgary portal.

After a TBH is initiated it will move though three stages; (1) Draft, (2) Workflow/Approval and (3) Hired. The process to cancel or delete a TBH is dependent on what stage it is at, and the type of template used (e.g. Scholarship and Grad Assistant Research - or GAR - have unique characteristics). The following 3 sections will help you identify the stage a TBH is at and subsequently how to cancel/delete a TBH that is no longer required.

1) DRAFT STAGE

The draft stage is when a TBH has been initiated and the *Save for Later* button is selected. To identify if the TBH is in draft stage (and to subsequently delete it), use the following steps.

Step 1: Access the Add Template-Based Hire page.

- 1. From the myUofC portal, click **My work**.
- Under People management, click Templatebased hire. The Add Template-Based Hire screen is displayed.

	Dashboard 👻	All about me	My work
People management	Finance & Supply Chain	Travel	1.
Manager self service	Payment Selector Tool	Policy & proce	dures
Job opening request	Create a Payment Request	Travel & expen	ise card
Template-based hire 2.	Create expense report	Book travel	
Manage applicants	Manage expenses	International tra	avel & risk
My team learning	Create requisition	Team travel	
Job Profile Database	Manage requisitions	Mobile phone	roaming
Onboarding checklists	Pending approvals	Vehicle Rental	S
Human Resources site	Apply for PCard		
AUPE local 52 site	PCard reconciliation		
MaPS executive site	PER Statement		
TUCFA site	Preferred suppliers		
	Shipping & receiving		
	SCM service request forms		



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The Draft Hires to Process section will display any TBH transactions that are still in in draft form.

Add Templa	ate-Based Hire						
To begin please g click 'Create Trans	o to the 'Add a New Perso saction' to begin the hiring	on' section and c g process.	lick the appropriate template t	from the 'Look Up Sele	ct Template' menu, then		
The 'Draft Hires to continue the hire p	p Process' section lists per process.	ople that you hav	ve previously started to enter	who are currently in dr	aft status. Select a name t	D	
This information is about the collection	s collected under the auth on or use of this informatio	ority of the Freedon, please contact	lom of Information and Protec t Human Resources Help De	ction of Privacy Act. If y esk at (403) 220-5932.	ou have any questions		
Click the on-scree	en Help link at the top righ	t of the page to a	ccess available training resou	urces.			
Add a New Pe	erson 🕐						
Tra	insaction Type Hire/Reh	ire	•				
Se	elect Template		Q				Create Transaction
Tra	nsaction Type Hire/Reh	ire	٣	Refresh			
Draft Hires to I	Process				Personalize	Find 💷 🔣	First 🕚 1 of 1 🕑 Last
Select Tra	ansaction Type	Effective Date	Name		Person ID	Action	Country
🗆 ні	IRE	2016/06/01	Jane Sample		NEW	Add Gen Assoc	Canada
Doloto So	elected Transactions						

If the TBH you are searching for is;

- <u>listed</u> in the Drafts Hires to Process section proceed to \rightarrow step 2
- <u>not listed</u> proceed to \rightarrow section 2) Workflow/Approval Stage

Step 2: If the TBH is listed under **Drafts Hires to Process** use the following steps to delete it. This also applies to a GAR and Scholarship TBH.



- 1. Locate the TBH you would like to delete and click the **Select** box after double checking the information is for the correct individual.
- 2. Click the *Delete Selected Transactions* button. The template for the employee/student is deleted and cannot be retrieved.

Draft Hires	Draft Hires to Process Personalize Find 💷 🔜 First 🕚 1 of 1 🕑 Last					
Select Transaction Type Effective Date Name			Person ID Action Country		Country	
1 .	HIRE	2016/06/01	Jane Sample	NEW	Add Gen Assoc	Canada
Delete	Delete Selected Transactions 2.					

End of Process



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2) WORKFLOW/APPROVAL STAGE

The TBH is in the workflow/approval stage when it is submitted for processing (i.e. you clicked the *Submit for Approval* button on the Manage Hire Details page) and is **still pending approval**. To identify if the TBH is in the workflow/approval stage, and subsequently delete it, follow these steps.

Step 1: Access the Manage Hire Details screen to bring up the TBH.



Step	2:	Locate	the TBH	I
------	----	--------	---------	---

- 1. Enter either the
 - o request number or the
 - o EMPL ID or
 - o the name
- 2. Click Search.

Important! Ensure the correct TBH is selected from the search results!

Find an Existing Value	
Search Criteria	
Request ID = 🔻	
Template Sequence = •	1 Entor
Template begins with v	
Hire Request Status = •	search
Empl ID begins with 🔻	
First Name begins with 🔻	
Last Name begins with 🔻	
Department begins with 🔻	
Location Code begins with 🔻	



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Step 3: Check the Hire Status on the Mange Hire Details page

- A) When the TBH <u>appears</u> on the Manage Hire Details page and the Hire Status shows as *Requested* - this indicates the TBH is pending approval and can still be cancelled. Proceed to Step 4 to cancel the request.
 - Note: For a Scholarship or GAR TBH - if the Hire Status is *Requested* and the Cancel Request button is still enabled, the TBH can be cancelled. Proceed to Step 4.

Manage Hires		
Manage Hire Deta	ails	
Nam	e May Zie Zie Requ	est ID: 120355
Template Hire Status	UC_GRAD_RSRCH_HRLY - Grad Assistants Research Project Hourly Requested View Term	plate
Requestor Organizational Relationship Start Date Action Action Reason	Your Name Employee 2019/01/01 II Hire Temporary	
Edits and Approvals		
Edits Ok No Approval Status App	roved	Run Edits Cancel Request
Job Edits Errors	Find View All First ④ 1 of 1 ④ Last	Submit for Approval
Approval Comments		Ŕ

B) If the TBH <u>does not appear</u> on the Manage Hire Details page (the search resulted in no matches found), this indicates the TBH was approved by all approvers and is no longer accessible. Proceed as follows.

If the TBH is for a Scholarship	If the TBH is for a GAR	For all other TBH
Scholarship records will automatically terminate after a period of inactivity. To terminate immediately send an email request to hrops@ucalgary.ca. End of Process	The Reports to Manager will need to initiate an online <u>Job Termination</u> <u>Request</u> . End of Process	Proceed to section 3) Hired stage to check the Template- Based Hire Status page.

Step 4: Cancel a TBH that shows a Requested status (pending approval) on the Manage Hire Details page.

1. On the Manage Hire Details page, enter a reason for the cancellation (e.g. Assistantship no longer required due to low registration) in the **Approval Comments** text field. You are unable to cancel a TBH without entering a reason.

Select Cancel	Edits and Approva	ls			
Request.	Edits Ok	Yes			Run Edits
The TBH is	Approval Status	Not Active		2	Cancel Request
returned to the	Job Edits Errors		Find View All	First 🕢 1 of 2 🕑 Last	Submit for Approval
Draft Hires to	Personal Data Edits	are OK			
Process section					
on the Add	Approval Comments				F
Template-					J
Based Hire					

page and can now be deleted in the next step. Note: Canceling the request does not delete the transaction. **Proceed to step 5.**

2.



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Step 5: Delete the Template-Based Hire

- 1. Access the Add Template-Based Hire page. From the myUofC portal, click \rightarrow My work, and \rightarrow Template-Based-Hire.
- 2. From the Draft Hires to Process section, select the TBH you would like to delete.
- 2. Click the **Delete Selected Transactions** button. The template for the employee/student is deleted and cannot be retrieved.

Add Te	mplate-Based Hire	e					
To begin pl click 'Creat	lease go to the 'Add a New I te Transaction' to begin the I	Person' section and (hiring process.	lick the appropriate template fr	rom the 'Look Up Sele	ect Template' menu, then		
The 'Draft I continue th	Hires to Process' section list ne hire process.	ts people that you ha	ve previously started to enter w	vho are currently in dr	raft status. Select a name t	0	
This inform about the c Click the or	nation is collected under the collection or use of this inform n-screen Help link at the top	authority of the Free mation, please conta o right of the page to	dom of Information and Protect ct Human Resources Help Des access available training resou	tion of Privacy Act. If sk at (403) 220-5932. rces.	you have any questions		
Add a N	lew Person 👔						
	Transaction Type Hire	Rehire	Ŧ				
	Select Template		Q				Create Transaction
	Transaction Type Hire	/Rehire	¥	Refresh			
Draft Hir	res to Process				Personalize	Find 💷 🔣	First 🕢 1 of 1 🕑 Last
Select	Transaction Type	Effective Date	Name		Person ID	Action	Country
1 .	1. HIRE 2016/06/01 Jane Sample				NEW	Add Gen Assoc	Canada
De	elete Selected Transactions	2.					

3. Email the approver informing the cancellation is complete.

End of Process



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3) Hired Stage

When the TBH does not show on the Manage Hire Details screen, check the Template-Based Hire Status page to confirm if the status is Hired/Added or Requested (pending). Navigate to the Template-Based Hire Status page (from the myUofC portal, click My work. Under People Management, select Manager Self Service \rightarrow Job and Personal Information \rightarrow Template-Based Hire \rightarrow Template-Based Hire Status).

1. You can also navigate from the Add Template-Based Hire screen. Select Template Based Hire Status.

Add Template-Based Hire	Template-Based Hire Status
Add a New Person ? Transaction Type Hire/Rehire Select Template Q Create Trans	The following transactions are pending, canceled or have been processed by Review Status All Transaction Type All
Transaction Type Hire/Rehire Refresh Draft Hires to Process ? You do not have any Hire/Rehire transactions in progress.	Cancelled Transaction Status Pending Processed Start Date From 2018/06/15 3 To 2018/07/05 3
Go To Template-Based Hire Status 1.	- 3. Refresh Clear

2. Click the HR Review Status dropdown and select All. If you process a high volume, you may want to refine the search by inserting a date range.

		Processed			
	Start Date From	2018/06/15	BI	To 2018/07/05	31
	3.	Refres	h	Clear	
Transactio	n Status				
You do not ha	ave any pending,	canceled or p	rocess	ed transactions.	
Go To	Add Templat	e-Based Hire			

3. Click Refresh.

Template-Based Hire Status							
The following	people are currently being processed for	4. If the status shows Hired/Added the Reports to Manager					
HR Review Status All			will need to initiate an online Job Termination Request. Note				
Transaction Type Hire/Rehire Ithis also applies to a GAR TBH.							
Start Date From 2019/01/01 101 To 2019/01/27 10 Refresh Clear Transaction Status (2) Personalize Find [20] 102 (20) Last							
Select	Transaction Type	Effective Date Trans	saction Status	Name	Person ID	Action	
	Hire/Rehire	2019/01/01 Hired	i/Added	Employee Name	1	Hire	
Select All	Deselect All		4.				
Del	lete Selected Transactions						
Go To	Add Template-Based Hire						

Note: Template-Based Hires appear in the Manager's standard reports the day after they are processed by HR Operations. End of Process