

## **Editing a Template-Based Hire**

**Reference Guide** 

### **Editing a Template Based Hire**

#### **Purpose:**

This quick reference guide takes you through the process of editing a Template-Based Hire from the Draft Hires to Process section of the Add Template-Based Hire page.

Scenarios under which you can edit a Template-Based hire are as follows:

- You clicked the Save for Later button.
- You clicked the Save and Submit button on the Enter Employee Information page, but have not clicked Submit for Approval on the Manage Hire Details page. In this scenario, enter a cancellation reason in the Comments field on the Manage Hire Details page and click the Cancel button to prepare to edit.
- You have clicked the Submit for Approval button on the Manage Hire Details page. In this scenario, enter a cancellation reason in the Comments field on the Manage Hire Details page and click the Cancel button to prepare to edit.

Audience:

University of Calgary employees with the Reports to Manager or HR Forms Initiator security role in Human Resources PeopleSoft.

#### **Prerequisites:**

Must be logged in to the myUofC portal.

#### Step 1: Access Template-Based Hire Screen

- 1. From the myUofC Portal, click **My work**.
- 2. Under People management, click **Template-based** 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 & exper   | nse card    |
| Template-based hire 2. | Create expense report     | Book travel      |             |
| Manage applicants      | Manage expenses           | International tr | 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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#### Step 2: Select the TBH to Cancel

1. From the **Draft Hires to Process** section, click the employee name for the template you wish to edit.

The Template-Based Hire for this individual will be displayed.

| Add a N  | ew Person 🕐           |                |                |           |                  |                         |
|----------|-----------------------|----------------|----------------|-----------|------------------|-------------------------|
|          | Transaction Type Hire | Rehire         | ~              |           |                  |                         |
|          | Select Template UC_   | CWR_CONSULTAN  | T_Q            |           |                  | Create Transaction      |
| Draft Hi | Transaction Type Hire |                | ✓ Refresh      | Person    | alize   Find   🔄 | 📕 🛛 First 🕙 1 of 1 🕑 La |
| Select   | Transaction Type      | Effective Date | Name           | Person ID | Action           | Country                 |
|          | HIRE                  | 2016/06/01     | Jane Sample 1. | NEW       | Add Gen<br>Assoc | Canada                  |

#### Step 3: Edit the Template-Based Hire

- 1. Locate the fields that you wish to edit and make your changes.
- 2. Click through each tab to enable the Save and Submit button.
- 3. Click Save and Submit.

| Enter Personal Info Enter Job Info Final page 2. |                               |
|--|-------------------------------|
| Employee Information                             |                               |
| TBH Start Date                                   |                               |
|  | Job Effective Date 2016/06/01 |
| General Associates - Expected Job End Date       |                               |
| *Expected Job End Date 2017/06/22                | End Job Automatically         |
| Work Location - Job Fields                       |                               |
| *Department 11280 Q                              |                               |
| General Associates - UC Job Information          |                               |
| Job Code CWR002 - Gen Assoc Consu                |                               |
| Job Information - Reporting Information          |                               |
| *Reports To Position 00005025 Q<br>Number        |                               |
| Employment - Organizational Assignment Data      |                               |
| Business Title Title                             |                               |
| Return to Enter Transaction Details Page         |                               |
| Save and Submit <b>3.</b> Save for Later Cancel  |                               |

The Manage Hire Details page is displayed.



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#### **Step 4: Double Check the Edits**

- 1. On the Manage Hire Details page, click the View Template link to review the information you added to the template.
- 2. If all information on all tabs is correct, click **OK**.

The Manage Hire Details page is displayed again.

| Name Jane Sample                                    | Request ID: 830                                 | )63 |
|---|---|-----|
| The Start Date entered on this page will be used as | s the Effective Date for Personal Data and Job. |     |
| Template UC_CWR_CONSULTANT - Gen Asso               | ociate - Consultant/Contractor (No Empl ID)     |     |
| Hire Status Requested                               | 1. View Ter                                     | mp  |
| Requestor Jason Smith                               |   |     |

#### Step 5: Submit the Modified Template-Based Hire

- 1. Click the **Run Edits** button.
- 2. If there are no errors to correct, click **Submit for Approval**.

If you receive an error message after clicking the Run Edits button, review the error message and make the required corrections. Click Run Edits again before submitting the Template-Based Hire for approval.

#### The process is now complete.

### **Additional Information**

If you need help with editing your Template-Based Hire, or with the steps above, contact the HR Help Desk at 220-5932.

Note: If you no longer need the Template-Based Hire you have drafted and/or submitted for approval and would like to delete it, refer to the <u>Cancel a Template-Based Hire</u> job aid on the Training and Development website.

|      | Run Edits        |
|------|------------------|
| Са   | ncel Request     |
| Subn | nit for Approval |