

Editing a Template-Based Hire

Reference Guide

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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 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 Number | |
| Employment - Organizational Assignment Data | |
| Business Title Title | |
| Return to Enter Transaction Details Page | |
| Save and Submit 3. 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 |