

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		



Editing a Template-Based Hire

Reference Guide

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.



Editing a Template-Based Hire

Reference Guide

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