

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.

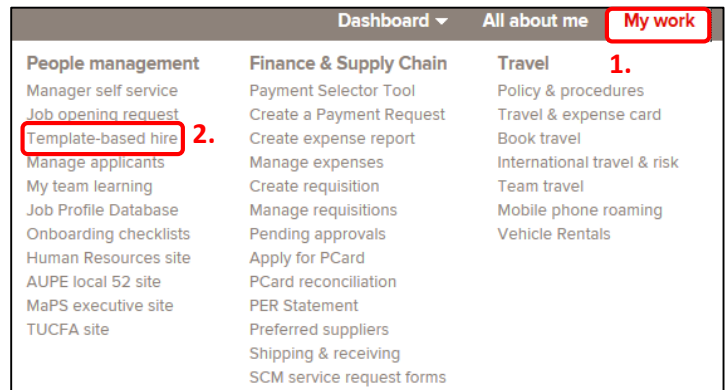
Prerequisites:

- 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.



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.

[Template-Based Hire Help](#)

Add a New Person ?

Transaction Type: Hire/Rehire
 Select Template: UC_CWR_CONSULTANT

Transaction Type: Hire/Rehire

Draft Hires to Process Personalize | Find | | | First 1 of 1 Last

Select	Transaction Type	Effective Date	Name	Person ID	Action	Country
<input type="checkbox"/>	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

General Associates - UC Job Information

Job Code CWR002 - Gen Assoc Consu

Job Information - Reporting Information

*Reports To Position Number 00005025

Employment - Organizational Assignment Data

Business Title Title

[Return to Enter Transaction Details Page](#)

3.

The **Manage Hire Details** page is displayed.

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**.

Name Jane Sample	Request ID: 83063
The Start Date entered on this page will be used as the Effective Date for Personal Data and Job.	
Template UC_CWR_CONSULTANT - Gen Associate - Consultant/Contractor (No Empl ID)	
Hire Status Requested	1. <input type="button" value="View Template"/>
Requestor Jason Smith	

The **Manage Hire Details** page is displayed again.

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.

1.	<input type="button" value="Run Edits"/>
	<input type="button" value="Cancel Request"/>
2.	<input type="button" value="Submit 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 [Cancel a Template-Based Hire](#) job aid on the Training and Development website.