

Getting Started: Using PAC/TBH

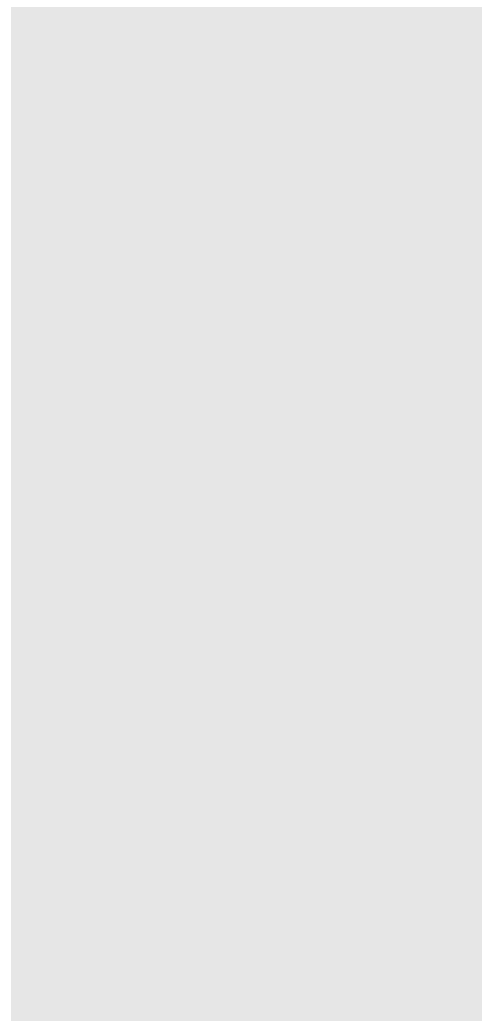
The Purpose of this Lesson

The purpose of this lesson is to review the TBH workflow and the roles within the process, the documentation required to enter a new hire or rehire and learn how to navigate PAC to access the templates used to enter hires. You will be given the opportunity to practice navigating in the live system.

Lesson Learning Objectives:

At the end of this lesson, you will be able to:

- Recall the TBH workflow and the roles in the process
- Gather and Prepare Entry Data
- Prepare and Scan Documents
- Log on to and explain how to exit PAC/TBH
- Navigate PAC using the menu, folders and links
- Add and Create Favorites
- Locate and access the Hire and Rehire Templates



The Templates

There is a specific online template for each of the following types of employees you are hiring or rehiring.

- Academic Hire – Morningside
- Academic Hire – CUMC
- Academic Rehire – Morningside
- Academic Rehire – CUMC
- Administrative Hire
- Administrative Rehire

Hire Types not using the TBH Templates

Before we review the roles in the TBH process, it is important to note that there are certain employment instances where this process will not be used.

Continue to use the paper process for the following types of hires:

- Academic personnel whose hire date occurred more than 3 months prior to today's date
- Academic personnel awaiting a Social Security Number (SSN)
- Academic personnel with stipends (postdoctoral research fellows and postdoctoral clinical fellows)
- People being hired with multiple jobs/appointments or those being hired into an additional job
- Academic personnel who are reappointed on rosters
- Academic personnel going on leave immediately upon hire

TBH Templates are specific to the type of hire:

- Administrative (New Hire or Rehire)
- Academic - CUMC (New Hire or Rehire)
- Academic - Morningside (New Hire or Rehire)

The Workflow

Each of these templates has a specific workflow. A workflow is the path a transaction takes between initiation and commitment to the live PAC system.

The role in the workflow also differs depending on if the hire is an Academic or Administrative employee.

Your role in the workflow is defined by 2 factors:

1. Your PAC role, e.g. Manager Self-Service or TBH Initiator, defines the pages you can access and the employees you can view (i.e. those who are in your home department(s)).
2. Your DAF authority defines the transactions you have permission to approve.

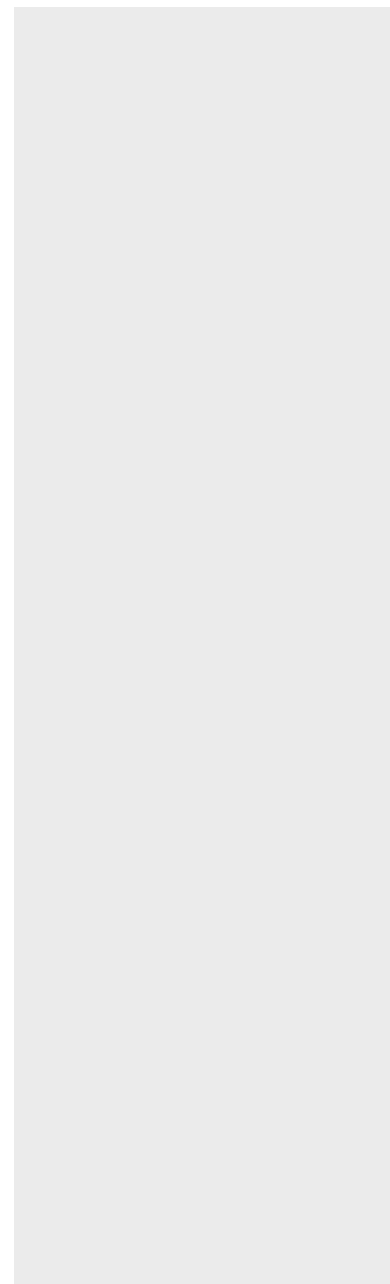
The Initiator gathers and enters information into the transaction pages. The transaction then moves to the approver(s) who review and approve the transaction.

The Human Resources Processing Center (HRPC) is the final stop along the workflow and completes the hire process and adds the person into PAC.

Let's look at the workflow



Access the **Academic Workflow Job Aid** in your reference materials.



The TBH Roles

Each role in the workflow process has a specific set of actions and steps that allow the user to enter, review and approve information and submit the transaction through the process.

There are 3 role groups within the TBH process. These groups are:

- **Initiators** who enter data into the template.
- **Approvers** who review the template data and approve the transaction.
 - Includes Foreign Funding Approvers, if needed, and
 - Reviewer role (optional)
- **Human Resources Processing Center (HRPC)** who add personal and job record information to PAC and create the tax set-up for the employee.

The roles in the TBH workflow are:

- Initiator
- 1st Level Approver
- Foreign Funding Approvers (if needed)
- 2nd Level Approver
- 3rd Level Approver (Academic/Clinical Hires Only)
- Reviewers (optional role)
- HRPC

The TBH Roles - Initiator

What is an Initiator?

An Initiator is a user who initiates a new hire or rehire transaction using the hire templates in PAC.

An Initiator can save an incomplete transaction and return to update it prior to submitting it to the 1st Level Approver. This feature allows an Initiator to begin a hire transaction while waiting for additional information.

An Initiator performs the following tasks when initiating a hire or rehire transaction:

- Enters all biographical (such as date of birth and gender), position and salary data
- Scans and attaches all relevant documents into the template
- Reviews and confirms all information entered
- Submits the transaction for approval to a 1st Level Approver

Initiators do not deny transactions. They can cancel a transaction and begin again. This is equivalent to ripping up a sheet of paper and writing on a new sheet of paper.



The “Save for Later” feature allows you to begin a transaction and complete it at a later time. This should be balanced, however, with the number of transactions that you have in draft status at one time. Only you have access to your draft queue and if you are out of the office, the transactions cannot be acted upon. A good practice is to gather all information prior to initiating the transactions and complete them upon entry.

The Initiator

The TBH Roles – Approvers and Reviewers

What is an Approver?

Approvers provide a review of the transaction data and perform the approval by:

- Verifying that the hire is in line with the policies and procedures of the University.
- Reviewing the data entered by the Administrative Department (Initiator and/or 1st Level Approver) to ensure it is complete and accurate. **Note:** If as an approver, you also have Initiator access and initiate a transaction, the transaction will appear in all 1st Level Approver queues including your own.
- Updating the form as needed. **Note:** Only 1st level approvers in the administrative (home) department can make changes to a template. All subsequent approvers and reviewers can only add a comment to the template.
- Confirming the required documents are attached.

Approvers can take the following actions on a transaction:

- **Approve** the transaction and send it forward in the workflow process to the next Level Approver or the HRPC.
- **Deny** the transaction. This will void the transaction and make it inactive. The transaction is removed from the workflow and is no longer accessible. Transaction will need to be initiated again.
- **Recycle** the template back for correction or if additional information is required. Note: 1st level approvers recycle a template to the Initiator, all subsequent approvers recycle a template back to the 1st level approver.
- **Save** the transaction. Clicking the “Save” button saves any changes you make to a transaction. This feature allows you to change data and save those changes without leaving the page. **Note:** Only 1st level approvers in the administrative (home) department can make changes to a template. All subsequent approvers and reviewers can only add a comment to the template.
- **Quit Without Saving.** Clicking this button removes any data changes you made (1st level approver in the home department) or comments added (all subsequent approvers) to the form *since it was last saved*. Any information entered/documents attached (1st level approver in the home department) or comments added (all subsequent approvers), *from the last time it was saved*, will not be saved in the system. This action does not remove the transaction from the workflow; it simply brings you back to the form as it was when it was last saved.

- 1st Level Approver
- Foreign Funding Approvers (if needed)
- 2nd Level Approver
- 3rd Level Approver (Academic/Clinical Hires Only)
- Reviewers (optional role)

The TBH Roles – Approvers and Reviewers

There are several levels of approvers within the University, each with a security access to approve transactions at a certain level.

TBH Approval Levels:

- 1st level approver (administrative department)
- Foreign funding approver(s) (1st level approvers not in the administrative department for the employee but are providing funding)
- 2nd level approver (school/department)
- 2nd level reviewer (school/department). This is an optional role for review only. A 2nd level reviewer cannot approve or deny a transaction.
- Graduate School of Arts and Sciences (GSAS) reviews student officer appointments for the Arts & Sciences (Morningside only)
- 3rd level approver (campus)

Notes:

- If you have multiple approver levels (e.g. 1st and 2nd), you should only act upon the transaction once. All hire transactions must have at least two different individuals approve the transaction.
- Only the admin department can make changes to a template. All subsequent levels can only add a comment to the template.

- 1st Level Approver
- Foreign Funding Approvers (if needed)
- 2nd Level Approver
- 3rd Level Approver (Academic/Clinical Hires Only)
- Reviewers (optional role)

The TBH Roles - HRPC

HRPC and the Manage Hire Process

The final step to adding a new hire is to perform the manage hire process. All of the entries into the system up to this point have been done in an electronic template or form. This information is saved on staging tables within the system. The employee is not actually added to the PAC system until HRPC completes the manage hire process.

What is HRPC?

HRPC is the Human Resources Processing Center and an HRPC team member can add an employee's personal, job and tax record into the PAC system.

HRPC performs the following actions on a transaction:

- **Reviews** the transaction data and performs the final hire entry.
- **Completes** the transaction by: adding the personal and job record to PAC and creating the tax set-up for the employee.
- **Recycles** the transaction. This action returns the transaction to the 1st Level Approver if updates are needed
- **Deny** the transaction. This action denies a transaction and makes it inactive. **Note:** It is rare that HRPC will deny a transaction and will consult with Level 3 Approver.

You will know that an employee is added to the PAC system once you are able to access their information in MSS.

The HRPC

The TBH Roles – Knowledge Check

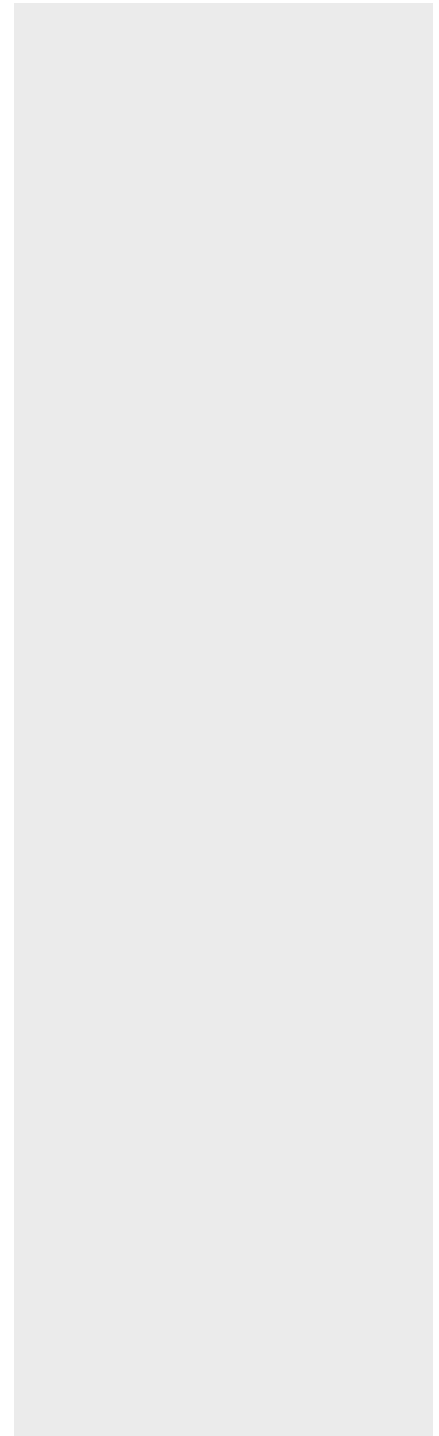
Question: What is your role(s) in processing hire and rehire transactions?

Question: Who are the 1st, 2nd and 3rd Level Approvers for your Department/School? If you do not know, how would you find out?

Question: Why are there multiple roles and approvals in the hire process?

Question: What roles can update data on a template?

Question: What department completes the hire process and adds the employee into PAC?



Adding New Hires and Rehires in PAC

It is necessary to understand the hire process in your department or school in order to correctly enter a new hire into a PAC template.

Data field name differences between the electronic form and the paper form

As you will need to use the paper Nomination Form/PAF for some hire transactions, it is helpful to note that some data field names do not appear on the paper Nomination Form/PAF or are named differently in the electronic template.

The table below lists items on the paper Nomination Form/PAF and their electronic template names and definitions.

Template Item	Listed on Paper Form as	Electronic Form Definition
EMPLID	Employee ID (PAF Only)	Person ID/EMPLID
National ID (SSN)	SSN	National ID is the SSN
Affirmative Action	Not on paper PAF/ Nomination Form	Affirmative Action Clearance
Mailing Address	Mailing Address (Current) Address	Mailing Address
Position Description	Title	Position Description
Compensation Rate Code	Salary Type (PAF/ Nomination Form)	Salary Type
Period/Contract Salary	Form uses the Comp Rate field	Salary amount for the specific appointment period
Compensation Rate	Annual Rate	Use the compensation rate field. Annual/Hourly rate (paychecks are based on this rate)

Preparing Entry Data

Before you begin entering the employee information into the template, it is beneficial to complete the following steps as you will have all pertinent data readily available and you will not need to stop the entry process.

1. **Gather the required documents** from which you will enter the person's information;
2. **Scan the documents** into a secured share drive or encrypted local drive;
3. **Determine if the hire was a previous employee at the University.** If so, obtain the Employee ID. For Rehires, you will use the Rehire template which is covered in a separate lesson;
4. **Obtain the position number** for the hire.

Additional points to note:

- Follow your current process to perform these steps. The information gathered from these steps determines which template is chosen and the data that is entered into the template.
- It is important to select the correct template at the initial selection because once data is saved into a template, it cannot be transferred into another template. You would have to begin the transaction over again, entering the data in the correct template.

Prepare Entry Data:

1. Gather documents
2. Scan documents
3. Is employee a hire or rehire?
4. What is the position number?

Preparing Entry Data:

1. Gather Required Documents

A first step to entering hire information into the electronic template is to gather the employee documentation that contains the information that you will enter into the data fields.

Attaching documents electronically eliminates the need to send paper documents between offices. You can attach as many documents as needed to an employee's template-based hire form.

Gather Documents

Gather the required and supporting documents for the hire.

Each department and school may require slightly different information and documentation to approve a transaction. **Examples** of these items are listed below. ***This is not a complete list of documents. The Attaching Documents Job Aid has an inclusive list of documents.***

- Curriculum Vitae (CV) for Faculty, Officers of Research, Officers of the Libraries. Not needed for Student Officers.
- Signed Offer Letter
- Chairman's Letter – CUMC Academic only
- W4 Form
- IT 2104 or 2104.1 or 2104.E
- NYS 195(1) Form
- Invention Agreement – Academic (as needed)
- Financial/Accounting Information

Prepare Entry Data:

Gather documents

Preparing Entry Data:

2. Scan Documents

Prepare to Scan Documents

1. Locate the scanner for your department or school.
2. Locate the secure shared drive or encrypted local drive where scanned documents are kept for your department or school.
3. Group paper documents into category types. Every document is placed into a category within the document attachment feature. All documents in one type of category are scanned together and saved as one file. Doing this allows you to attach one file to one category. The one file may contain several documents.
4. Follow your department's procedure on scanning documents. When saving the document or batch of documents, be sure to name it with a clearly labeled description of what is contained in the attachment. Examples: R.Jones_TaxForms or Q.Smith_CV

Here is an example on how to attach tax forms:

There is a category in the document attachment feature for "Tax Forms". A person completes multiple tax forms such as a W-4 and a IT 2104.

1. Scan all tax forms together into your secure location as one file.
2. Save the file with the person's name and the words tax forms. Now you will be able to easily locate the tax forms for the person.
3. When this file is attached in the tax forms category, you will see that it contains all of the tax forms in the single attachment.

Prepare Entry Data:

Scan documents

Preparing Entry Data:

2. Scan Documents, cont.

Where do I scan documents?

Follow your department's procedure on scanning documents. Options include:

- 1) Scan documents into a secure network shared drive
- 2) Scan documents into an encrypted local hard drive (see CUIT regarding desktop encryption)
- 3) Scan documents to your local hard drive and then delete them after uploading them to the hire/rehire transaction.

What type of documents can be scanned and attached?

- Attach files in '.pdf' format. PDF documents are more stable and take up less electronic storage space.
- Electronic copies of documents can also be attached. If you receive a document via email and save it to a secure shared drive or encrypted local drive, you can attach the document without scanning it first – since it is already saved electronically.
- Documents with foreign wording can be scanned and saved as a PDF file. This will preserve the formatting and ensure that words will not be converted to symbols.

Scanning Tips

- Documents should not be emailed as they contain sensitive employee information.
- When saving the document or batch of documents, be sure to name it with a clearly labeled description of what is contained in the attachment. Examples: R.Jones_TaxForms or Q.Smith_CV
- If the document you are scanning is double sided, be sure to copy each page prior to scanning to ensure each page is viewable as an attachment.



Access the **Attaching Documents Job Aid** in your reference materials for a full list of documents and process information.

Prepare Entry Data:

Scan documents

Preparing Entry Data:

3. Determine if the academic officer is a Rehire

Determining if an academic officer is a rehire is an important step in the process as the initial template selection is specific to a hire or a rehire. Data that is saved into one type of template cannot be transferred into another template. You would need to begin the transaction again, entering the data in the correct template.

If the Academic Officer is a Rehire

If you determine that the person is a rehire, note the prior Employee ID as you will need to enter it into the rehire template.

Entering the Employee ID pulls some of the existing personal and job data into the template, thus eliminating the need to re-enter all data. You will need to validate the information that appears to confirm that it is still accurate per the source documents you obtained.

How do I determine if the Academic Officer is a Rehire?

To determine if the person was a prior University academic officer or currently active you can look up the SSN in FFE.

There is also a SSN check built into the hire and rehire templates that will search the database for a match.

To search for a SSN match, simply enter the SSN into the National ID (SSN) data field and tab out of the field or click "save for later." This will search the database and return to you one of the following results:

- If there is not a match for the person with this SSN, continue on as this person was never employed at Columbia University.
- If there is a match and this SSN is currently in use by a Columbia University employee, an error message will appear saying that this SSN is already in use for an employee and will provide the Employee ID. If you receive this message, check that you entered the correct SSN, or take note of the EMPL ID to be used in the rehire template.
- If the SSN entered is not a valid 9 digit number, an error message will appear saying that this is not a valid SSN and to check it and try again.
- If you are performing this on the rehire template, the search will additionally check the SSN against the EMPLID entered. If the SSN does not match the prior EMPLID, you will receive an error message asking you to check the SSN and EMPLID.

If you are experiencing difficulty determining if the person was previously employed at the University, you can also contact the HRPC Helpdesk for assistance.

Prepare Entry Data:

Is the person a new hire or rehire?

Preparing Entry Data:

4. Obtain the Position Number

Run a Position Management Report to obtain position numbers

Via **MSS** - If you have access to Manager Reporter in MSS, access this feature and run a Position Management Report. Select the prompts and run the report. If you do not have access to the reporter feature in MSS, you can obtain this report from the approver in your department who has access and can provide the report to you.



The position number indicates the job you are filling. It is efficient to obtain the position number prior to entering data into the template. It is also very important to select /enter the correct position number into the template as positions are either full or part time and the position number is specific for each.



Access the **Obtaining a Position Number Job Aid** in your reference materials.

Prepare Entry Data:

What is the position number?

Logging on to PAC

Step 1 – Log in to the training environment and access the Template-Based Hire page

Using the following tools and information, please log on to the PAC training environment.

- Assigned training computer
- Training ID provided to you by the facilitator
- Password provided to you by the facilitator



Exit PAC

How about the correct way to exit PAC? List the two methods to exit the system:

Question: Why is it important to exit PAC?

The three sections of PAC are:

- Employee Self Service
- Manager Self Service
- Workforce Administration (new hires and rehires are entered in the Template-Based Hire section)

Navigation Menu*

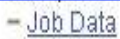
The Navigation Menu allows you to simply click through various levels of data to arrive at the screen that has the information you need.

Types of Menu Options

On the left hand side of the screen, you will see folders and links that allow you to move within the system and an employee record. There are two types of menu options: folders and links.



A folder is preceded by an arrow. When you click on a folder name, the folder expands to show its contents.



A link is underlined and preceded by a hyphen. The links for a folder appear after all the other content in a folder. When you click on a link, the search page for that page group is displayed in the area to the right of the menu.

Hiding the Menu



If you find that the menu gets in your way by taking up valuable space on your screen, you can hide the menu by clicking the minimize button at the top right of the menu pagelet. The menu is replaced by an icon which appears above and to the left of your page.

You can always expand the menu again when you need it by clicking on the Expand menu icon.



Components of the Navigation Menu are:

- Folders
- Links

The Navigation Menu can be:


- Hidden
- Expanded

Princeton University. "Finding HR Information in the HCM System" [Online] Available <http://web.princeton.edu/sites/oitdocs/Documentation/PS9/What%27s%20New%20Home.html>, August 5, 2008.


Searching for a Menu Option

If you cannot remember where a particular page is located, you can use the Search field at the top of the main menu to locate any component (page group) by name. Simply type some key words of the page group name into the search box, and click the search arrow.

The search results will be displayed on a new page. Each component that matches your search criteria will be listed, with a brief explanation and the navigation path. Scroll through the list to locate the page you want, and click the link to open the search page associated with that menu.



The first screenshot shows the PAC system navigation menu. The search box is highlighted with a red rectangle. The search box contains the text "template" and a search arrow button. Below the search box is a list of menu items, including "My Favorites", "Self Service", "Manager Self Service", "Workforce Administration", "Benefits", "Payroll for North America", "Workforce Development", "Organizational Development", "Workforce Monitoring", "Campus Community", "Set Up HRMS", "Worklist", and "Change My Password".



The second screenshot shows the search results page. The search box contains the text "template" and a "Find" button. Below the search box is a "Search Results" section with a single result: "1 Template-Based Hire". The result description is "Hire employees / Add Contingent Workers using templates." and the navigation path is "Home>Workforce Administration>Template-Based Hire>Template-Based Hire".

Check Your Skills

- Hide the navigation menu
- Expand the navigation menu
- Use the search field to locate pages. Try locating "Template"

Search the Navigation Menu
to find the location of an item

*Princeton University. "What's New in PeopleSoft 9" [Online] Available
<http://web.princeton.edu/sites/oitdocs/Documentation/PS9/What%27s%20New%20Home.html>, August 5, 2008

Navigation Pages*

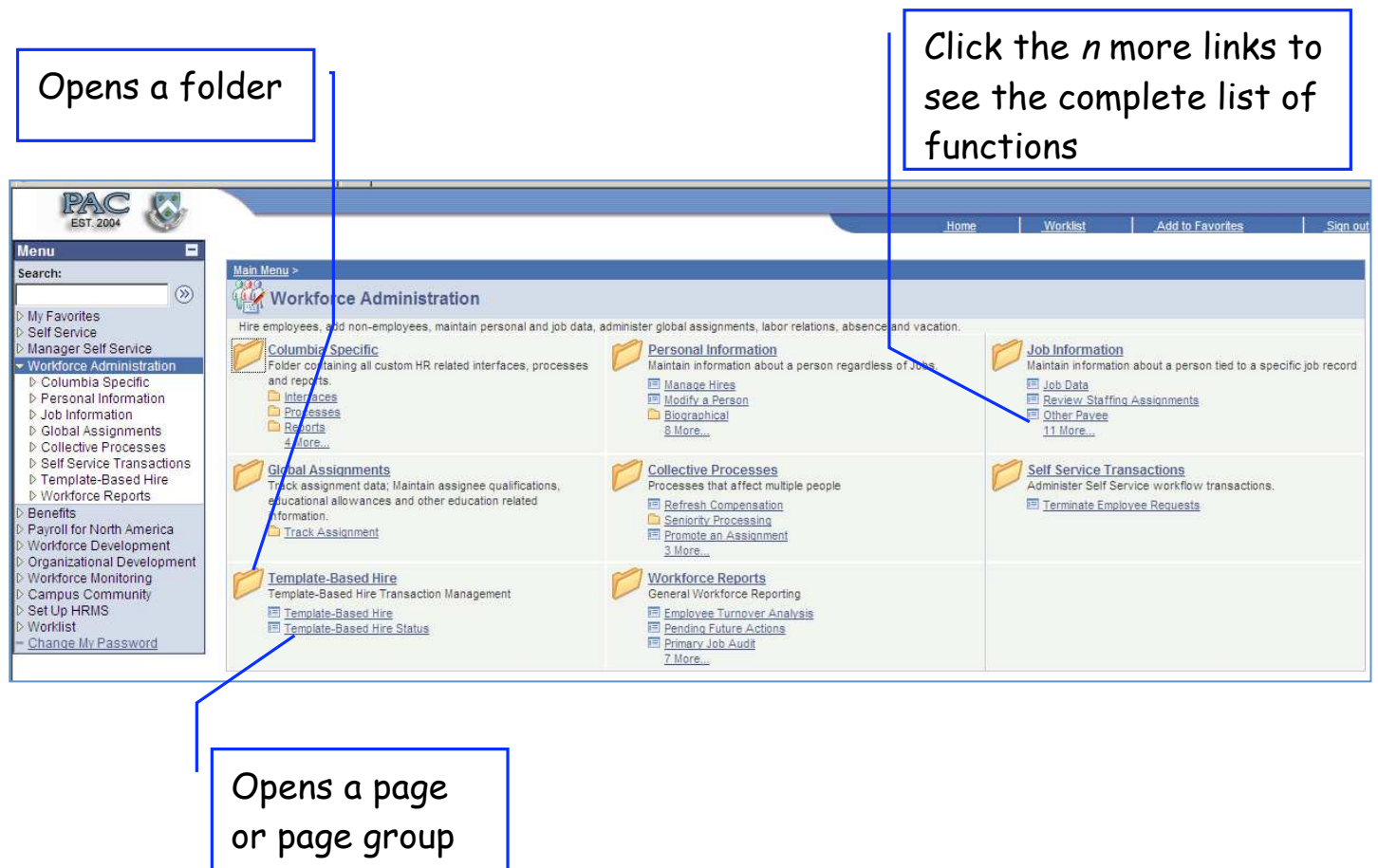
When you click on a folder in the menu, a navigation page for that folder appears, in addition to the menu folders, with the path at the top of the page.

Navigation pages group the available processes in sections, with a brief explanation of each section, and one or more links to either folders or page groups.

Icons at each level indicate whether a link will open a new folder or a page. If there are more than 4 links in a section, the last link will indicate how many more links there are. Click that link to open the section folder and see all the links.

As with the menu links, when you open a page group, the appropriate search page is displayed. The path is not displayed, but the menu is.

Note – the screen print below was taken from a test environment. Your screen view may appear slightly different.



*Princeton University. "What's New in PeopleSoft 9" [Online] Available <http://web.princeton.edu/sites/oitdocs/Documentation/PS9/What%27s%20New%20Home.html>, August 5, 2008.

Navigate PAC

Using navigation menu links

Simply click on the topic in the navigation menu to “drill down” to the page level where the information you need is displayed.

Example – The first page to access to enter a new hire is [Main Menu](#) > [Workforce Administration](#) > [Template-Based Hire](#) > **Template-Based Hire**. You will arrive at the page to select a template. You arrived at this page by using the links in the left hand menu.



Using navigation links from the main screen section

Simply click on the topic in the main section of the screen to “drill down” to the page level where the information you need is displayed.

Example – click Workforce Administration. Notice how the folders are displayed to the right of the menu on the screen. Now click on the Template Based Hire folder on the right side of the screen. Then click on Template Based Hire from the right side of the screen. You will arrive at the page to select a template. You arrived at this page by using the links in the main section of the screen.

The left hand navigation menu allows you to quickly search through the system

~ ~ ~ ~ ~

The main section of the screen displays all folders and links

Access and Create Favorites*

If you find that you use a page group often, you can add it to your favorites in PAC, which makes accessing the page group much simpler—you don't need to remember where to find the page, just open your favorites and click the link!

To add a page to your favorites:

1. Click the [Add to Favorites](#) link in the banner at the top right of your PAC window, or under My Favorites in the menu.
2. Make sure the description of the page makes sense to you, and will be clear in your favorites list. If it is not, type a new description that makes sense.
3. Click OK.

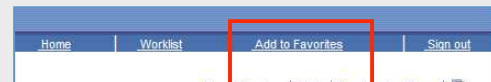
To change your favorites:

1. Under My Favorites, click the [Edit Favorites](#) link.
2. To change the name displayed for the page in your my Favorites menu, type your preferred name over the existing one.
3. To change the order of the links in your My Favorites menu, type the rank order number for each favorite in the Sequence Number field.
4. To delete a page you no longer need, locate the page, and click the Delete button in that row. You will be prompted to verify the deletion. Click OK.
5. When your changes are complete, click Save.

Check your Skills

Try creating and editing a favorite to the menu:

1. Navigate to the Template-Based Hire page and save it as a favorite.
2. Access the Edit Favorites link and view the saved page locations.



Adding favorites to your menu lets you quickly access frequently used pages

*Princeton University. "What's New in PeopleSoft 9" [Online] Available <http://web.princeton.edu/sites/oitdocs/Documentation/PS9/What%27s%20New%20Home.html>, August 5, 2008.

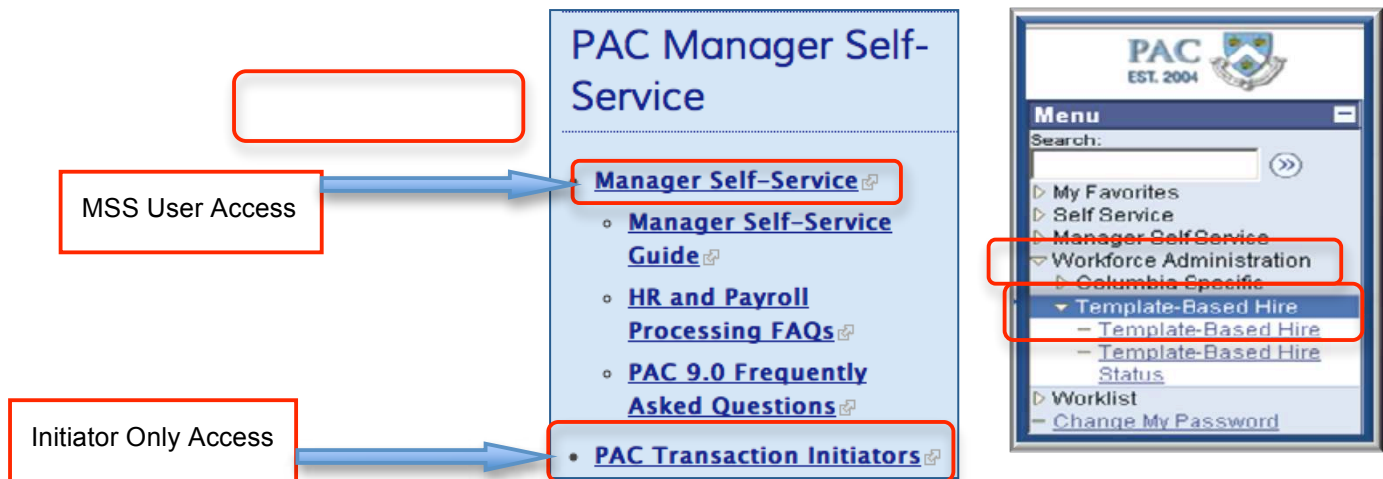
Logging on to PAC – *When you are back at your desk*

When you are back at your desk, you will access PAC through the MSS link in the myColumbia portal.

At the myColumbia portal:

1. Log in with your UNI and Password
2. Click on the “HR Manager Resources” tab
3. Under the PAC Manager Self Service section:
 - i. Initiators - click on the “PAC Transaction Initiators” link
 - ii. MSS Users - click on the “Manager Self Service” link
4. Click on the “Workforce Administration” link and then the “Template Based Hire” link.

myColumbia Portal PAC Links



Access the Hire/Rehire Templates

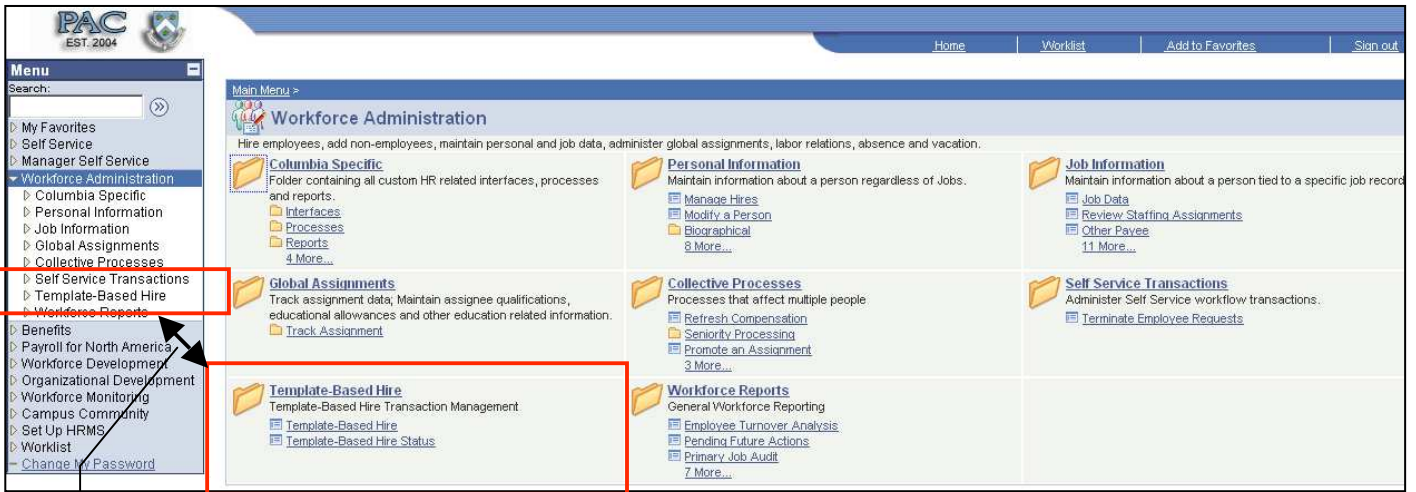
Access the correct template for the type of hire you are entering.

- Select the “**Template-Based Hire**” link from the Navigation menu on the left hand side of the screen or from the main page section.
- From the main page section, click the “**Template-Based Hires**” page link.
- In the “**Add a New Person**” section of the main page, click the magnifying glass next to the Select Template field.
- Select the required template. For example, “**Hire-Academic**”.
- The description of the type of template appears on the right side of the field.
- Click **Go**.
- This action brings you to the page to begin entering the Employee Information.

See the following pages for screen prints of these steps.

It is important to
select the correct template

Data cannot be transferred
from one template to
another. You would need to
begin over to re-enter data
into another template



Click the Template-Based Hire link from either the left hand navigation pane or from the main navigation page.



Click on the magnifying glass.

Select the needed template e.g. Hire-Academic.

Click 'Go'.

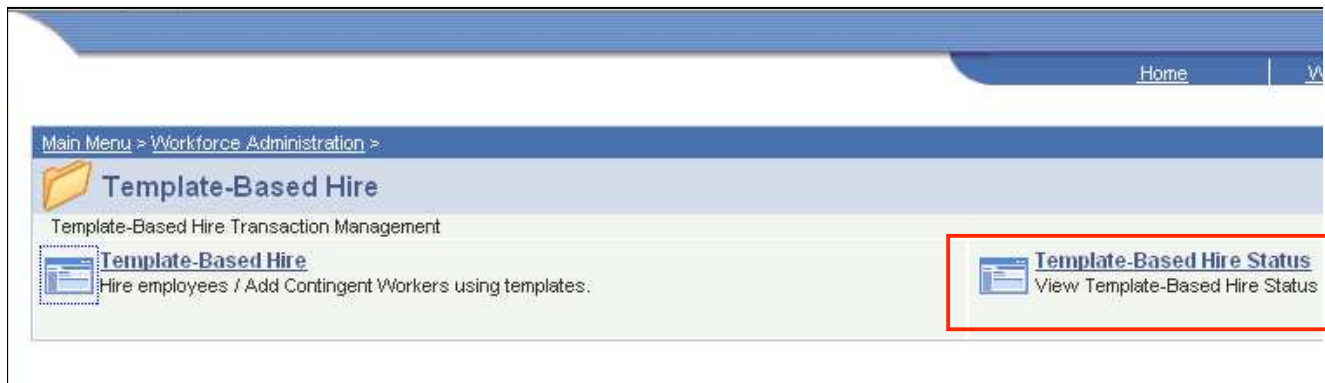
Note: if you have any hire transactions that are in process, they will appear in the "Draft Hires to Process" section of this page.

Template-Based Hire Status – *Initiators*

In the Template-Based Hire folder, there is also a page accessible to Initiators where you can also see which transactions are pending processing or approval by HRPC, have been cancelled by an Approver or HRPC, or processed by HRPC.

Initiators can click on the **Template-Based Hire Status** link from the left hand navigation pane of the PAC main menu.

Sample Template Hire Status page shown on the following page is for display purposes only.

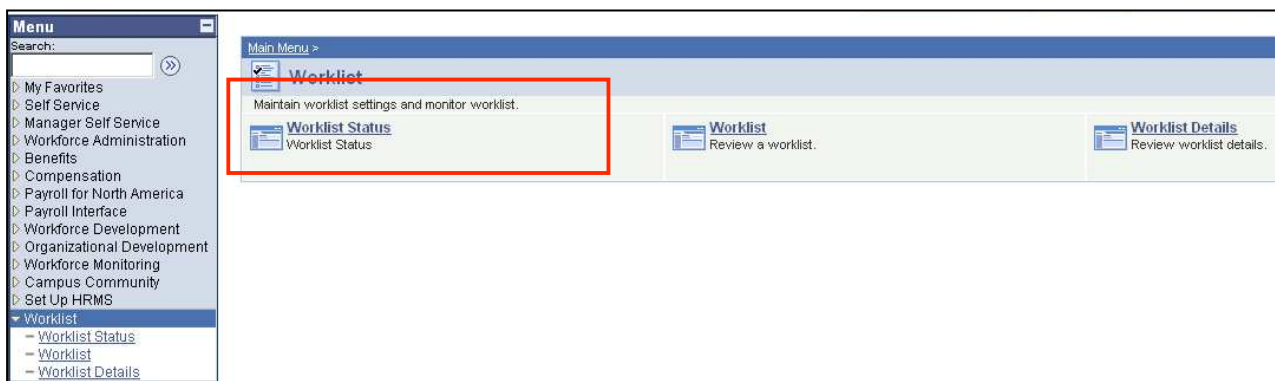


Template-Based Hire Status – *Approvers*

In the Worklist folder, there is also a page accessible to Approvers where you can also see where transactions are within the workflow. Transactions that appear on this page will be based on the DAF FFE department access so that anyone who has access to departments will see those template transactions in their Worklist Status Page.

Approvers can click on the **Worklist Status** link from the left hand navigation pane of the PAC main menu.

Sample Worklist Status page shown on the following page is for display purposes only.



Template-Based Hire Status – *Initiators*

- My Favorites
- Self Service
- Manager Self Service
- Workforce Administration
 - Columbia Specific
 - Personal Information
 - Job Information
 - Global Assignments
 - Collective Processes
 - Self Service Transactions
- Template-Based Hire
 - Template-Based Hire
 - Template-Based Hire Status**
- Workforce Reports
- Benefits
- Compensation
- Payroll for North America
- Payroll Interface
- Workforce Development
- Organizational Development
- Workforce Monitoring
- Campus Community
- Set Up HRMS
- Worklist
- Change My Password

Template Hire Status

The following people are currently in the Approval Workflow.

Pending Hires							Customize Find First 1-2 of 2 Last
Name	Type of Hire	Start Date	Action	Country	Status	Person ID	
Robert Smith	Employee	07/01/2010	Hire	United States	Pending Approval	NEW	
Steven Liu	Employee	12/01/2009	Hire	United States	Pending Approval	NEW	

The following people have been cancelled either an Approver or by Human Resources. In order to hire this person you must restart the hire/rehire process. You have the option to Remove them from your list.

Cancelled Hires							Customize Find First 1 of 1 Last
Select	Name	Type of Hire	Start Date	Action	Country	Person ID	
<input type="checkbox"/>	Pamela Jones	Employee	01/01/2010	Hire	United States	NEW	

The following people have been hired into the system. You have the option to Remove them from your list.

Processed Hires							Customize Find First 1 of 1 Last
Select	Name	Type of Hire	Start Date	Action	Country	Person ID	
<input type="checkbox"/>	Jack Jones	Employee	01/01/2010	Hire	United States	10157717	

Go To: [Template-Based Hire](#)

Template-Based Hire Status – Approvers

Worklist Status

The following people are currently in the Approval Workflow.

Pending Hires

Name	Start Date	Action	ET/PT	Job Code	Status	Person ID	Submitted By
Customize Find View All First 1 of 1 Last							

The following people have been cancelled either by an Approver or by Human Resources. In Order to hire this person you must restart the hire/rehire process. You have the option to Remove them from your list.

Cancelled Hires

Select	Name	Start Date	Action	ET/PT	Job Code	Person ID	Rejected By
<input type="checkbox"/>							

The following people have been hired into the system. You have the option to Remove them from your list.

Processed Hires

Select	Name	Start Date	Action	ET/PT	Job Code	Country	Person ID
<input type="checkbox"/>							

Go To: [Worklist](#)

Key Learning Points

- It is important to log out of PAC when you are away from your desk
- Gathering employee and position data and documents prior to entering information in the templates is helpful and avoids stoppage during the entry process
- Navigating through the system and the Template-Based Hire function is done by using folders, links and pages
- Creating favorites allows you to quickly access frequently used pages