



Creating and Updating an Employee Profile

An employee profile must be entered in Cardinal before:

- An employee can be granted access to Cardinal
- An employee's travel or expense transactions can be entered or reimbursed

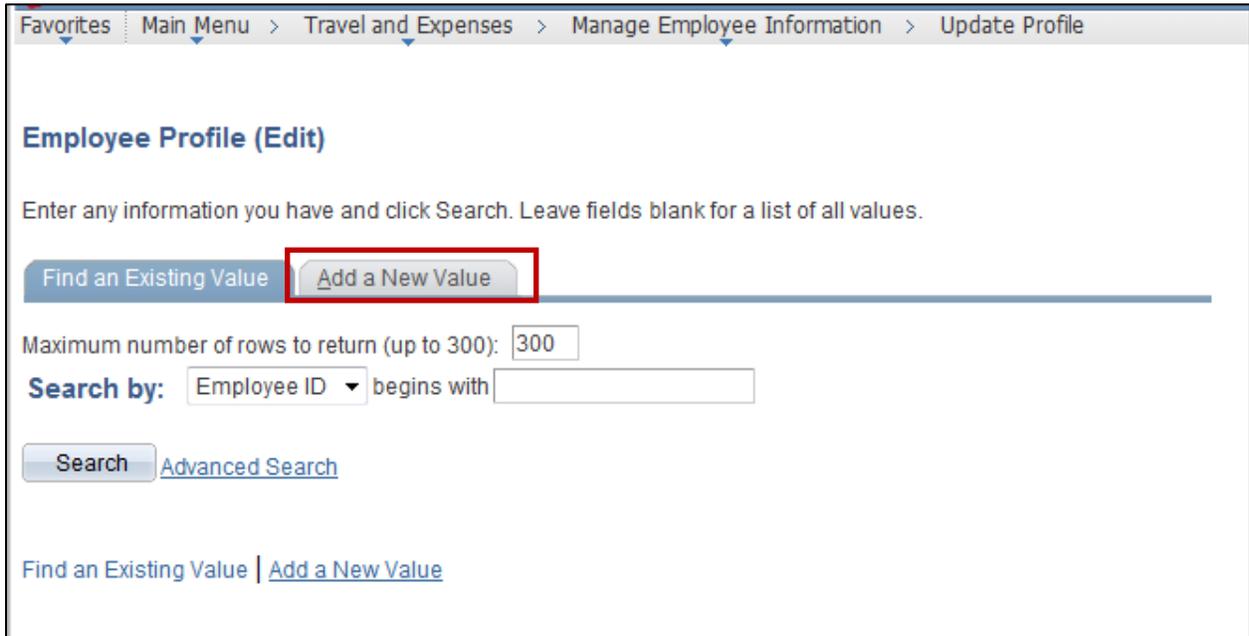
The employee profile captures name, address, employee status, Agency Business Unit, department, supervisor, cash advance level, and payment information such as the employee's EDI bank account information.

Employee Profiles can be added and updated by agency users with the Employee Profile Maintenance role. Profile maintenance includes changes of address, department, default distribution ChartFields, supervisor changes or Employee Status.

The Cardinal Remittance Electronic Data Interchange (REDI) Authentication Interface process verifies all newly created employee accounts in the REDI Virginia system.

Banking information is interfaced from the Commonwealth Integrated Payroll/Personnel System (CIPPS). The DOA EDI Coordinators have access to enter this information when necessary (e.g., when CIPPS update has not yet been processed).

Creating a New Employee Profile:



Favorites | Main Menu > Travel and Expenses > Manage Employee Information > Update Profile

Employee Profile (Edit)

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | **Add a New Value**

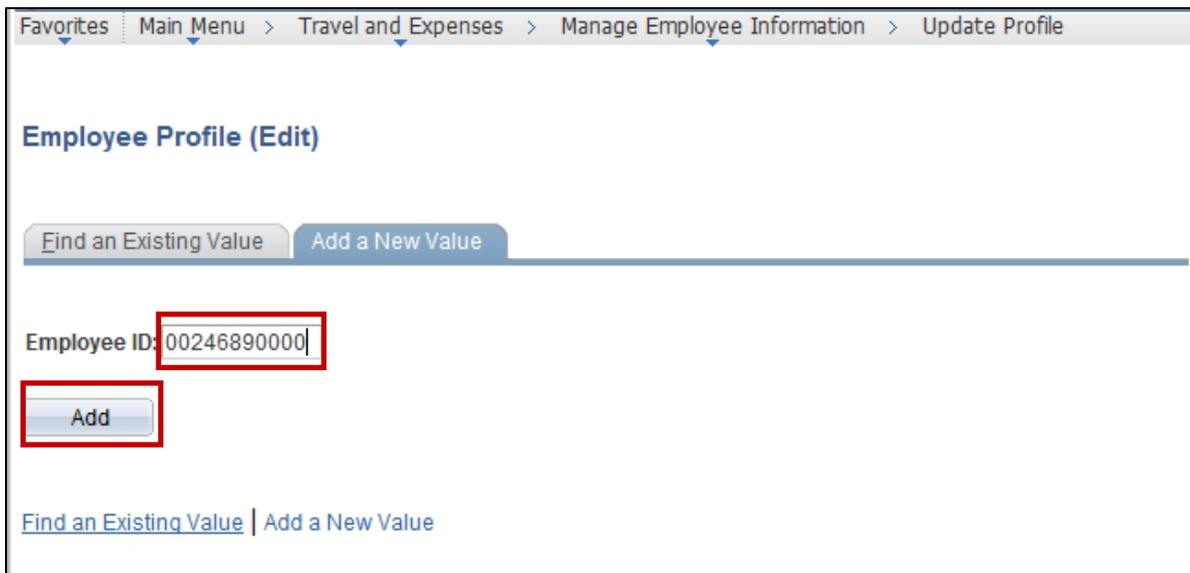
Maximum number of rows to return (up to 300):

Search by: Employee ID ▾ begins with

[Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

- 1 Navigate to the **Employee Profile (Edit)** page using the following path:
Main Menu > Travel and Expenses > Manage Employee Information > Update Profile
- 2 Click the **Add a New Value** tab.



Favorites | Main Menu > Travel and Expenses > Manage Employee Information > Update Profile

Employee Profile (Edit)

Find an Existing Value | **Add a New Value**

Employee ID:

[Find an Existing Value](#) | [Add a New Value](#)

- 3 Enter the **Employee ID** number.
- 4 Click the **Add** button.

SW AP316 Creating and Updating an Employee Profile

Favorites Main Menu > Travel and Expenses > Manage Employee Information > Update Profile

Employee Profile (Edit)

Find an Existing Value Add a New Value

Employee ID:

Add

The value you tried to add already exists. Select it below if you'd like to update it, or specify a new value in the fields above.

Search Results

View All First 1 of 1 Last

Employee ID	Name	Last Name
00009150900	Cardinal, Joe	Cardinal

- 5 If you enter the **Employee ID** and the employee already has a profile in Cardinal, the name information displays at the bottom of the page like the screenshot above.
- 6 Click the **Employee ID** to access their profile and go the section entitled **Updating an Employee Profile** on page 8 of this job aid.
- 7 If the profile does not exist, go to the next step.

Favorites Main Menu > Travel and Expenses > Manage Employee Information > Update Profile

Warning -- No match found for Employee ID 00000123456 in Cardinal CIPPS EDI data. (25003,102)

The Employee ID entered does not match the Cardinal CIPPS EDI Data. This could be due to one or more of the following reasons:

- Employee ID is entered incorrectly. Typically, the Cardinal Employee ID comprises of the 9-digit CIPPS Employee ID followed by '00'.
- Employee has not signed up for direct deposit in CIPPS.
- Employee is a new hire and their direct deposit data has not been entered in CIPPS.
- Employee is exempt from using their payroll account for expense reimbursements.

OK Cancel

- 8 If the information does not match data in CIPPS, a **Warning** message like the one above displays. The EDI Data in Cardinal used for validation is stored in the Cardinal staging tables, so this is not an online direct feed from CIPPS when adding the employee.
 - Validate that the **Employee ID** is correct and should be added. Then click the **OK** button to continue entering the employee profile.
 - If the **Employee ID** is incorrect and should not be entered at this time, click the **Cancel** button.

SW AP316 Creating and Updating an Employee Profile

Favorites | Main Menu > Travel and Expenses > Manage Employee Information > Update Profile

Employee Data | **Organizational Data** | User Defaults

Employee Information

*Last Name: Edison | *First Name: Evelyn

Telephone: | Employee Base: Home Office

*Personnel Status: Employee | Payments Sent To: Home Address Mailing Address

Home Address

Country: USA | United States

Address 1: 123 East State Lane

Address 2: | eVA VLIN: | eVA Address ID: |

City: Richmond | County: | Postal: 23216

State: VA

Mailing Address

Country: USA | United States

Address 1: | Address 2: | eVA VLIN: | eVA Address ID: |

City: | County: | Postal: | State: |

Save | Notify | Add

[Employee Data](#) | [Organizational Data](#) | [User Defaults](#)

- 9 Complete the information under the **Employee Information** section of the page:
 - a. Enter the employee **Last Name, First Name**
 - b. **Personnel Status** – select **Employee**
 - c. The **Payments Sent To** defaults to the **Home Address**
 - d. If the employee has a separate mailing address, click the **Mailing Address** checkbox
- 10 In the **Home Address** section of the page, enter the appropriate information:
 - a. Enter the employee's **Address, City, Zip** and **State**.
- 11 If necessary, in the **Mailing Address** section, enter the appropriate information:
 - a. Enter the **Address, City, Zip** and **State**.
- 12 Click the **Organizational Data** tab.

SW AP316 Creating and Updating an Employee Profile

Favorites | Main Menu > Travel and Expenses > Manage Employee Information > Update Profile

Employee Data | Organizational Data | **User Defaults**

Expenses Processing Data Find | View All | First | 1 of 1 | Last

Valid for Expenses: No Default Profile
Reason for Status: Ignore Authorized Amounts

HR Information

Employee Status: Active

Hire Date: 02/03/2014

*GL Unit: 12900 Dept of Human Resource Mgt

*Department: 60000 Health Benefits Services

Hours Per Period: Use Business Unit Default

Supervisor Information

*ID: 0000099700

Name: Kent, Clark

Default ChartField Values Customize | Find | First | 1 of 1 | Last

*GL Unit	Fund	Program	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	Affiliate
12900	01000	107010							

Cash Advance Level

Business Unit 5,000.00 USD

Specific Amount

None

Expense Role

"If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company."

Expense Processing Role:

Save | Notify Add

Employee Data | Organizational Data | [User Defaults](#)

13 Complete the following in the **HR Information** section:

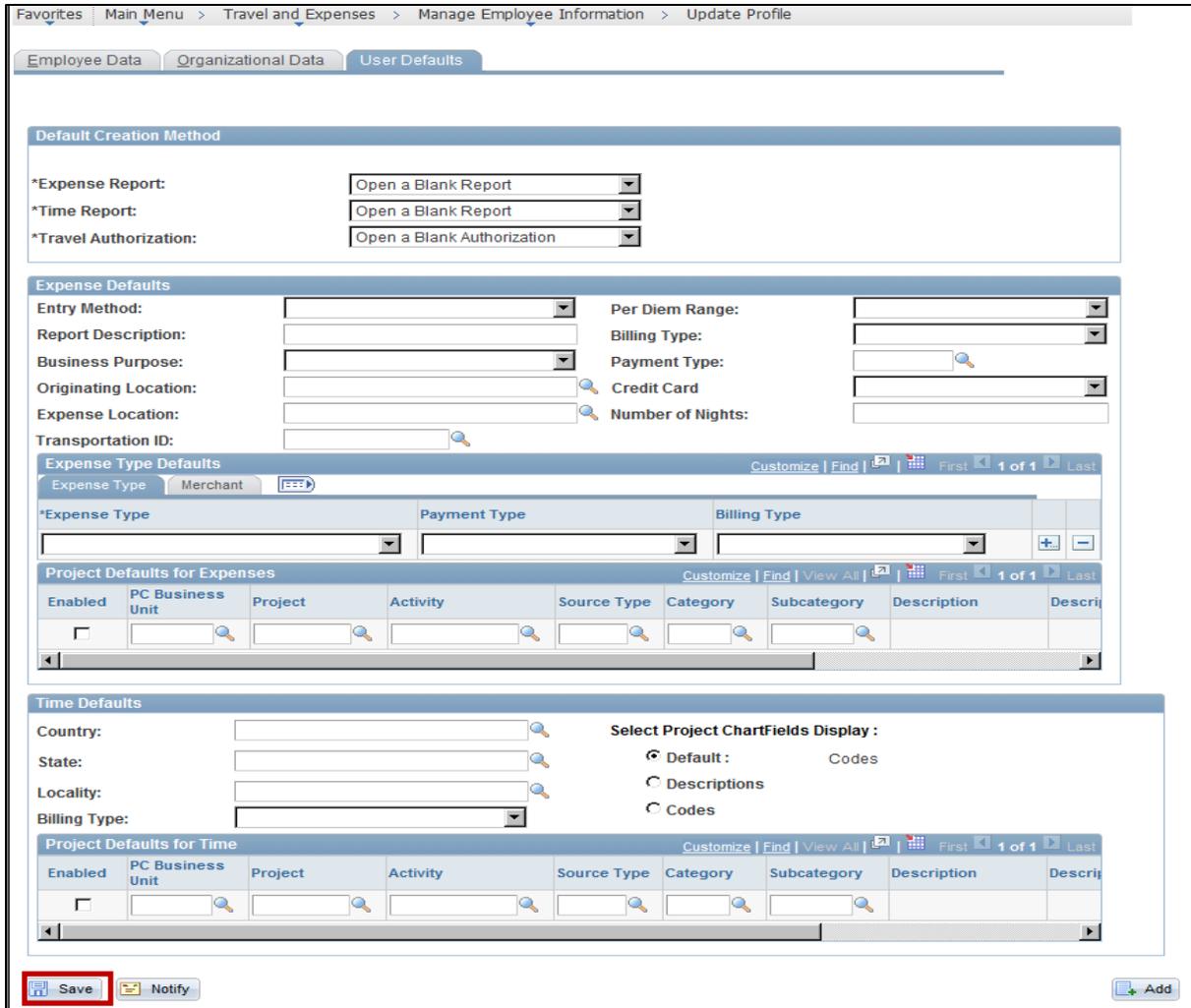
- a. **Employee Status** – select **Active**
- b. **Hire Date** – enter the employee's date of hire at your agency
- c. **GL Unit** – enter the Business Unit for the employee being entered
- d. **Department** – enter or select the appropriate Department code for the employee
- e. The **Use Business Unit Default** field defaults to checked, do not change this value.

14 In the **Supervisor Information** section, enter or select the **ID** of the individual who will approve expense transactions for the employee. This may or may not be the employee's actual supervisor. The **ID** is used by the workflow process to route transactions for the supervisor level approval.

15 In the **Default ChartField Values** section of the page, enter the standard charge distribution that is used by the employee. The values entered here will automatically default when an expense transaction is created for that employee in Cardinal. The values can be updated if necessary on the expense transaction.

SW AP316 Creating and Updating an Employee Profile

- 16** The **Cash Advance Level** field defaults to **Business Unit**. All Business Unit Cash Advance Levels are set up with a maximum allowable limit of \$5,000.00. The other two options are:
- a. **Specific Amount** - if the employee is eligible for a specific amount either higher or lower than the standard \$5,000, click this indicator and enter the amount.
 - b. **None** – if the employee is not eligible for a cash advance, click this indicator.
- 17** Click the **User Defaults** tab.



The screenshot shows the 'Update Profile' page with the 'User Defaults' tab selected. The 'Default Creation Method' section has three dropdown menus: '*Expense Report:' (Open a Blank Report), '*Time Report:' (Open a Blank Report), and '*Travel Authorization:' (Open a Blank Authorization). The 'Expense Defaults' section includes fields for Entry Method, Report Description, Business Purpose, Originating Location, Expense Location, Transportation ID, Per Diem Range, Billing Type, Payment Type, Credit Card, and Number of Nights. The 'Expense Type Defaults' section has a table with columns for Expense Type, Payment Type, and Billing Type. The 'Project Defaults for Expenses' section has a table with columns for Enabled, PC Business Unit, Project, Activity, Source Type, Category, Subcategory, Description, and Description. The 'Time Defaults' section includes fields for Country, State, Locality, Billing Type, and a radio button selection for Project ChartFields Display (Default, Descriptions, Codes). The 'Project Defaults for Time' section has a table with columns for Enabled, PC Business Unit, Project, Activity, Source Type, Category, Subcategory, Description, and Description. A 'Save' button is highlighted with a red box at the bottom left.

- 18** The **User Defaults** page allows you to specify user default values that reduce data entry for travel authorizations, expense reports and cash advances. These values can easily be changed on the expense transaction by the proxy during data entry if necessary.

All employees banking information is interfaced from CIPPS. If the employee information is not in CIPPS, you will need to inform the DOA EDI Coordinator so that the employee Bank Account information can be added manually if necessary. Otherwise the employee will be reimbursed by check until this information is updated. The **Bank Account** tab on the **Employee Profile** pages is only visible to the EDI Coordinator because it contains sensitive (i.e., personal banking) information.



Accounts Payable Job Aid

SW AP316 Creating and Updating an Employee Profile

- 19 Click the **Save** button at the bottom of the page to save the employee profile. After saving the employee profile, it needs to be validated prior to use on an expense transaction. The Validation process runs every hour in batch between 8-5 daily.

Employee Working for Multiple Cardinal Agencies:

If the employee is working for more than one state agency, a profile must be created for each agency from which the employee is requesting a reimbursement of expenses:

- 1 Create an alternative Employee ID number that will be used for your agency.
- 2 The new ID should be the nine digits from State Employee Human Resources ID number and 01 as the suffix (ex: **00000123401**). This alternative Employee ID number is used for all Expense Transactions created by your agency for this employee.
- 3 Once you create that alternative Employee ID, enter the employee profile by following the steps in the **Creating an Employee Profile** section of this job aid.

SW AP316 Creating and Updating an Employee Profile

Updating an Employee Profile:

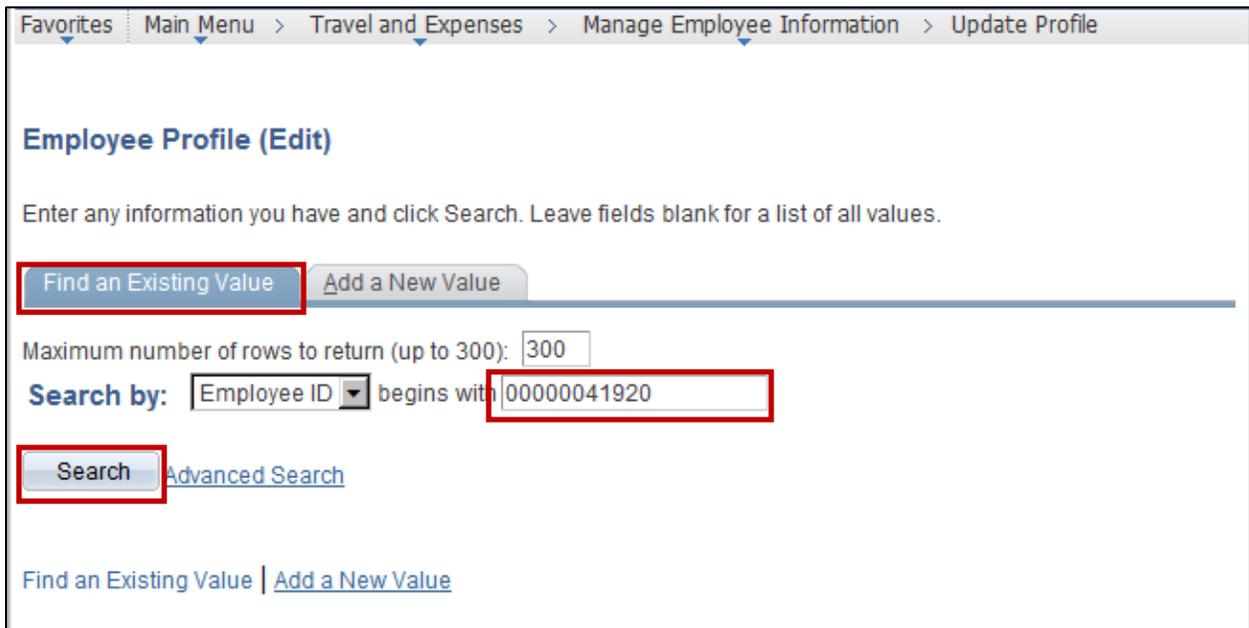
If the Employee Profile already exists, there are various reasons why you may need to update it. Review the Employee Profile Maintenance form and /or discuss with the employee to determine which scenario is applicable:

- Employee works for your agency and requires changes such as moves to another department, requires changes to the default ChartField values, change to person in supervisor role etc.
- Employee moves from one state agency to another state agency
- Employee leaves your agency and you need to update the status to terminate

Employee Works for Your Agency and Requires a Change:

If an employee works for your agency and requires a change, access the **Employee Profile (Edit)** page using the following path:

Main Menu > Travel and Expenses > Manage Employee Information > Update Profile



The screenshot shows the 'Employee Profile (Edit)' page. At the top, there is a breadcrumb trail: 'Favorites > Main Menu > Travel and Expenses > Manage Employee Information > Update Profile'. Below this, the page title 'Employee Profile (Edit)' is displayed. A message reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (highlighted with a red box) and 'Add a New Value'. Below the tabs, there is a text input field for 'Maximum number of rows to return (up to 300):' with the value '300'. The 'Search by:' section has a dropdown menu set to 'Employee ID' and a text input field for 'begins with' containing '00000041920' (highlighted with a red box). Below this is a 'Search' button (highlighted with a red box) and a link for 'Advanced Search'. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

- 1 On the **Find an Existing Value** tab, enter the **Employee ID**.
- 2 Click the **Search** button.

SW AP316 Creating and Updating an Employee Profile

Favorites | Main Menu > Travel and Expenses > Manage Employee Information > Update Profile

Employee Data | Organizational Data | User Defaults

JOHN DOE

Employee Information

*Last Name: *First Name:

Telephone:

Employee Base: Home
 Office

*Personnel Status:

Payments Sent To: Home Address
 Mailing Address

Home Address

Country: United States

Address 1:

Address 2:

eVA VLIN:

eVA Address ID:

City:

County: Postal:

State: Virginia

Mailing Address

Country: United States

Address 1:

Address 2:

eVA VLIN:

eVA Address ID:

City:

County: Postal:

State:

[Employee Data](#) | [Organizational Data](#) | [User Defaults](#) | [Bank Accounts](#)

- 3 Access the tab of the page that requires change(s).
- 4 Update the employee profile information as appropriate.
- 5 Click the **Save** button. Any changes made to the employee profile are saved.



Accounts Payable Job Aid

SW AP316 Creating and Updating an Employee Profile

Employee Moved from One Cardinal Agency to Another Cardinal Agency:

If an employee has moved to your agency from another Cardinal agency, there are several steps that you will need to complete. This is applicable only when both agencies are using Cardinal.

- 1 Open a help desk ticket addressed to Cardinal Security to request them to make changes on the employee profile. The email address for statewide requests is: vccc@vita.virginia.gov

This allows you to update the profile with your agency Business Unit, the correct supervisor and default ChartField information. See below for a sample e-mail:

To: vccc@vita.virginia.gov

Subject: Cardinal – Security Employee Profile Change Needed Employee ID: XXXXXXXXXXXX

Please make the below update to the employee profile for XXXXXXXXXXXX. This employee has moved from Cardinal Business Unit XXXXX to YYYYY.

For proper Expense Module processing, the below information must be updated so that agency XXXXX has access to make the remaining updates.

We understand the employee must be Terminated from the original BU, so please let us know if processing time will be longer than normal.

Employee ID: XXXXXXXXXXXX

Name: <Employee full name in Cardinal>

Former Business Unit: XXXXX

New Business Unit: YYYYY

New Department: XXXXX (size depends on the BU)

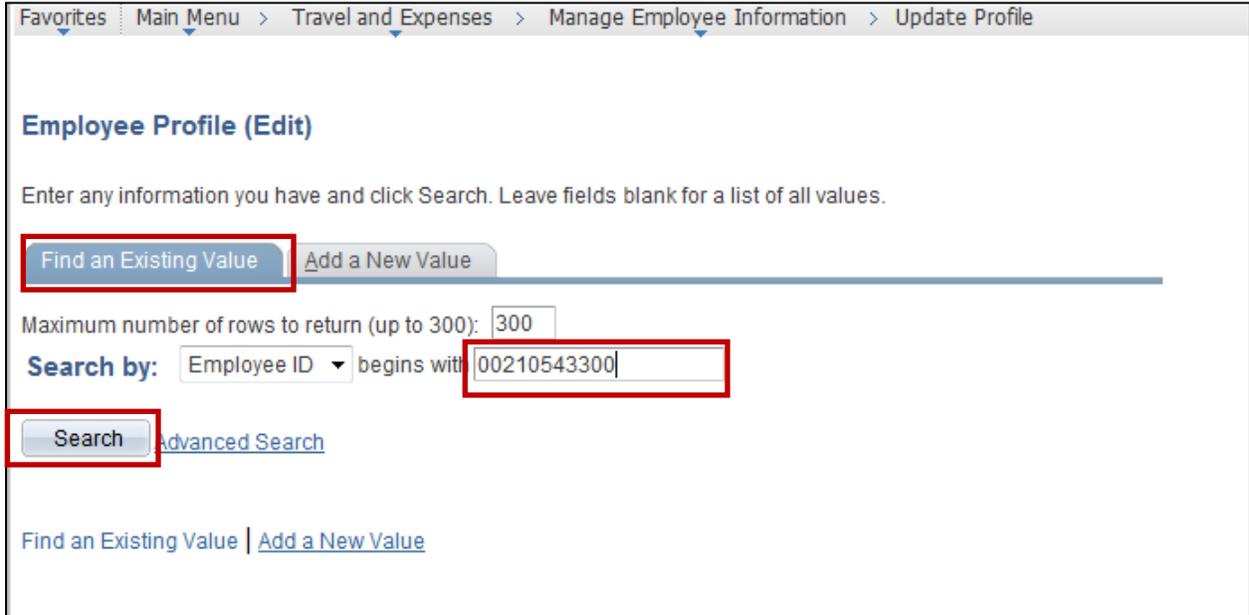
New Supervisor Employee ID: XXXXXXXXXXXX

New Supervisor Name: <Employee Name in Cardinal>

SW AP316 Creating and Updating an Employee Profile

- 2 Once a communication is received back from VCCC indicating the changes have been made (Help Desk ticket is closed) navigate to the **Employee Profile (Edit)** page using the following path:

Main Menu > Travel and Expenses > Manage Employee Information > Update Profile



The screenshot shows the 'Employee Profile (Edit)' page. At the top, there is a breadcrumb trail: 'Favorites > Main Menu > Travel and Expenses > Manage Employee Information > Update Profile'. Below this, the page title 'Employee Profile (Edit)' is displayed. A instruction reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (highlighted with a red box) and 'Add a New Value'. Below the tabs, there is a field for 'Maximum number of rows to return (up to 300):' with the value '300' entered. The 'Search by:' dropdown is set to 'Employee ID' and the 'begins with' field contains '00210543300' (highlighted with a red box). A 'Search' button (highlighted with a red box) and a link for 'Advanced Search' are visible. At the bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

- 3 Click the **Find and Existing Value** tab.
- 4 Enter the **Employee ID** number.
- 5 Click the **Search** button.

SW AP316 Creating and Updating an Employee Profile

Employee Data | **Organizational Data** | User Defaults

DONNA R BROWN

Expenses Processing Data Find | View All | First | 1 of 1 | Last

Valid for Expenses: Yes Default Profile
Reason for Status: Passed All Validation Edits Ignore Authorized Amounts

HR Information		Supervisor Information	
Employee Status:	Active	*ID:	0025201020
Hire Date:	01/01/1901	Name:	Cardinal, Kelly
GL Unit:	15100 Department of Accounts		
Department:	93100 Personnel		
Hours Per Period:	<input checked="" type="checkbox"/> Use Business Unit Default		

Default ChartField Values Customize Find First 1 of 1 Last									
GL Unit	Fund	Program	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	Affiliate
15100	06090	711006							

Cash Advance Level

Business Unit 5,000.00 USD
 Specific Amount
 None

Expense Role

"If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company."

Expense Processing Role:

Save | Return to Search | Notify | Add

[Employee Data](#) | [Organizational Data](#) | [User Defaults](#) | [Bank Accounts](#) | [Corporate Card Information](#)

- 6 Click the **Organizational Data** tab.
- 7 Verify the information provided in the email was updated correctly (GL Unit, Department, Supervisor ID and Name)
- 8 Update the **Default ChartField Values** with those from your Business Unit.
- 9 Click the **Save** button.

SW AP316 Creating and Updating an Employee Profile

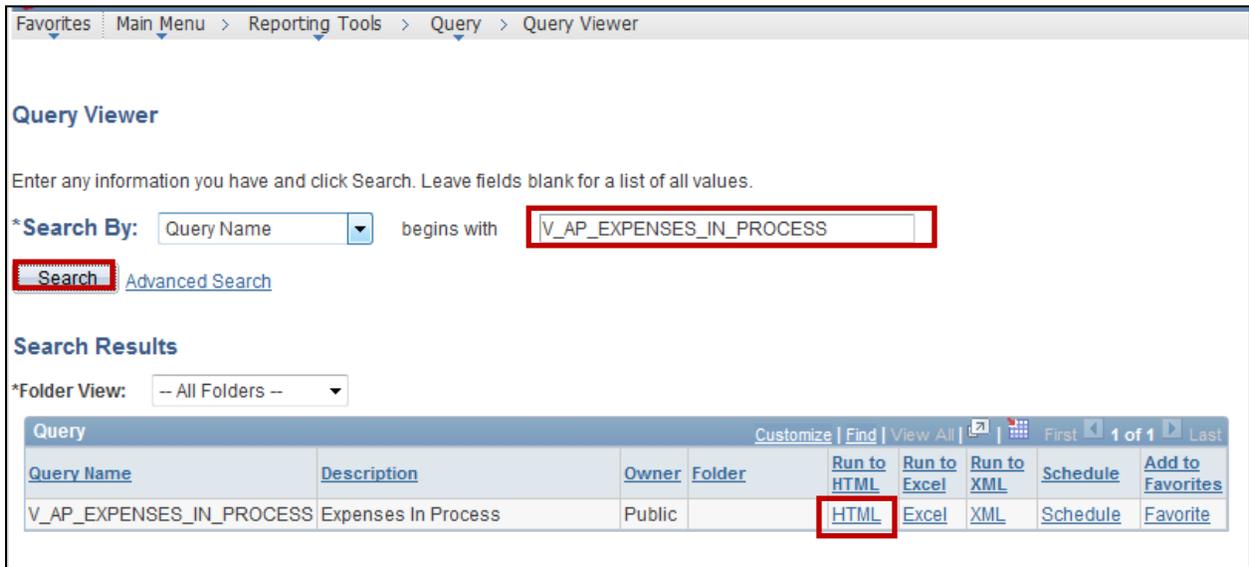
Changing an Employee Profile Status to Terminate:

When an employee no longer works for your agency, the Employee Profile Status needs to be changed to **Terminated**. This should only occur once all Expense transactions have been either paid or deleted and there should be no items in the queue for the employee to approve.

Verify there are no pending transactions:

- 1 Run the **V_AP_EXPENSES_IN_PROCESS** query to identify any transactions in progress.
- 2 Navigate to the **Query Viewer** page using the following path:

Main Menu > Reporting Tools > Query > Query Viewer



The screenshot shows the 'Query Viewer' page in a web application. The breadcrumb trail is 'Favorites > Main Menu > Reporting Tools > Query > Query Viewer'. The page title is 'Query Viewer'. Below the title, there is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria are: '*Search By: Query Name' (dropdown), 'begins with' (text), and 'V_AP_EXPENSES_IN_PROCESS' (input field). There are 'Search' and 'Advanced Search' buttons. Below the search section is the 'Search Results' section with a '*Folder View: -- All Folders --' dropdown. A table displays the search results:

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
V_AP_EXPENSES_IN_PROCESS	Expenses In Process	Public		HTML	Excel	XML	Schedule	Favorite

- 3 Enter the Query Name **V_AP_EXPENSES_IN_PROCESS**
- 4 Click the **Search** button.
- 5 The **Query Name** displays in the **Search Results** section of the page. Click the **HTML** link.



Accounts Payable Job Aid

SW AP316 Creating and Updating an Employee Profile

V_AP_EXPENSES_IN_PROCESS - Expenses In Process

Business Unit (% for all): 15100
 Dept ID (% for all): %
 View Results

Download results in: Excel Spreadsheet CSV Text File XML File (4 kb)

View All First 1,7 of 7 Last

Report Type	Business Unit	Department ID	Current Approver User ID	Approver Type	Report ID	Repe Status	Employee ID	Employee Name	Report Description	Total Amt	Amt Due Employee	Budget Status	Accounting Date	Submit Date	Entered By Userid	Out of Policy	Duplicates Exist	Associated Travel Auth ID	Associated Advance ID	Associated Advance Amt
1 Advance	15100	92100			000000139	STG	00482066600	ORK,CAROLYN H	Miami Travel	775.50	775.50		04/22/2014	04/22/2014	IBA39799					0.00
2 Expense Report	15100	92100	RRS99601	SUPERVISOR	0000032017	SUB	00482066600	ORK,CAROLYN H	Capital Outlay Test	210.00	210.00	E	04/23/2014	04/23/2014	IBA39799	N	N			0.00
3 Expense Report	15100	92100	VPH82737	REVIEWER	0000032013	SUB	00482066600	ORK,CAROLYN H	Testing DOA WF Change	200.00	200.00	V	04/15/2014	04/15/2014	IBA39799	Y	N			0.00
4 Expense Report	15100	92100			0000032016	STG	00482066600	ORK,CAROLYN H	Quarterly Meeting	500.00	500.00	V	04/22/2014	04/22/2014	IBA39799	Y	N			0.00
5 Expense Report	15100	95400	VPH82737	REVIEWER	0000032010	SUB	005665925500	WILLIAMS,TAYLOR	Christina Test Expense Report	90.00	90.00	V	04/04/2014	04/04/2014	PPS_STEPHENLI	N	N			0.00
6 Expense Report	15100	95900			0000032031	STG	00599695800	ink,Alex	Offsite Meeting	50.00	50.00	V	06/04/2014	06/04/2014	V_EMPLID10	N	N			0.00
7 Expense Report	15100	97200	RRS99601	SUPERVISOR	0000032025	SUB	00009150900	RAVIATT,CATHY P	test	100.00	100.00	V	05/12/2014	05/12/2014	VPH82737	N	N			0.00

- 6 Enter your agency **Business Unit** in the **Business Unit** field.
- 7 Enter the **Department ID** of the employee that needs to be terminated or **%** to show all departments.
- 8 Click the **View Results** button to run the query.
- 9 Review the results to determine if the employee you need to terminate has any transaction in progress. If so, ensure they are approved or deleted prior to terminating the employee in the system.

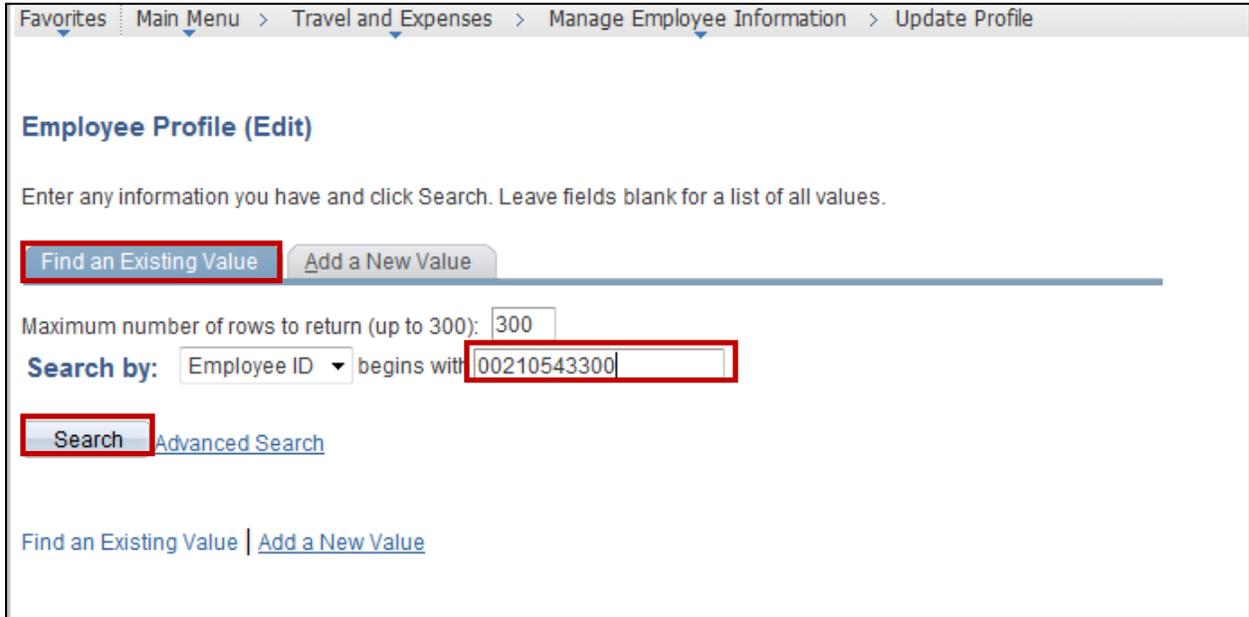
Once all items are clear and the employee does not display on the list, you can terminate the employee in Cardinal.

SW AP316 Creating and Updating an Employee Profile

Terminate the employee in Cardinal:

10 Navigate to the **Employee Profile (Edit)** page using the following path:

Main Menu > Travel and Expenses > Manage Employee Information > Update Profile



11 On the **Find an Existing Value** tab enter the **Employee ID** of the employee being terminated.

12 Click the **Search** button.

Employee Data | **Organizational Data** | **User Defaults**

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Expenses Processing Data Find | View All First 1 of 1 Last
Valid for Expenses: Yes Default Profile
Reason for Status: Passed All Validation Edits Ignore Authorized Amounts

HR Information **Supervisor Information**

Employee Status: **Terminated** *ID: 0025201020
Hire Date: 01/01/1901 Name: Cardinal, Kelly
*GL Unit: 15100 Department of Accounts
*Department: 95700 FSRI - Cardinal
Hours Per Period: Use Business Unit Default

Default ChartField Values Customize | Find First 1 of 1 Last

GL Unit	Fund	Program	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	Affiliate
15100	06090	711006							

Cash Advance Level

Business Unit 5,000.00 USD
 Specific Amount
 None

Expense Role

"If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company."
Expense Processing Role:

Save | Return to Search | Notify | Add

[Employee Data](#) | [Organizational Data](#) | [User Defaults](#) | [Bank Accounts](#) | [Corporate Card Information](#)

- 13 Verify that you have entered the correct employee.
- 14 Click the **Organizational Data** tab.
- 15 Before changing any information, take a before screenshot and save for your agency's records.
Screenshots are recommended because there is no effective dating on Employee Profiles. Once a change is made you are no longer able to view prior information.
- 16 In the Employee Status field, select **Terminated**.
- 17 Take a screenshot after changing the status for your agency's records.
- 18 Click the **Save** button. The Employee Record has been updated.