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

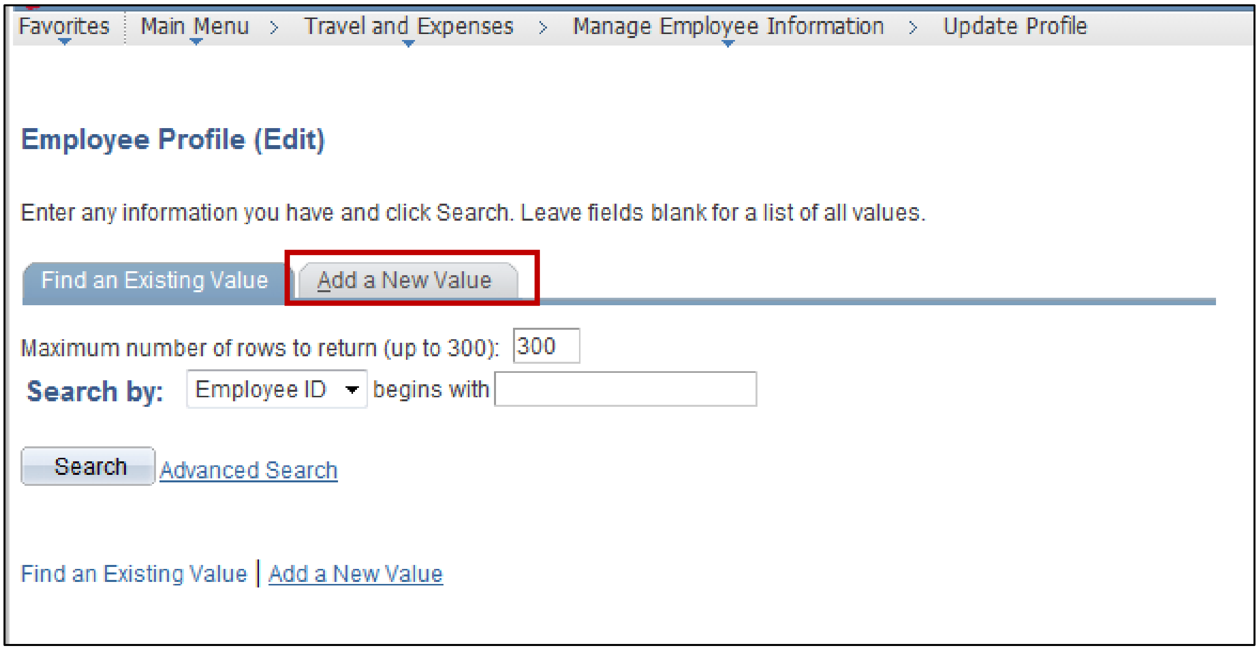
The employee profile captures name, address, employee status, Agency Business Unit, department, supervisor, cash advance level, and payment information such as the employee's EDI bank account information.

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).

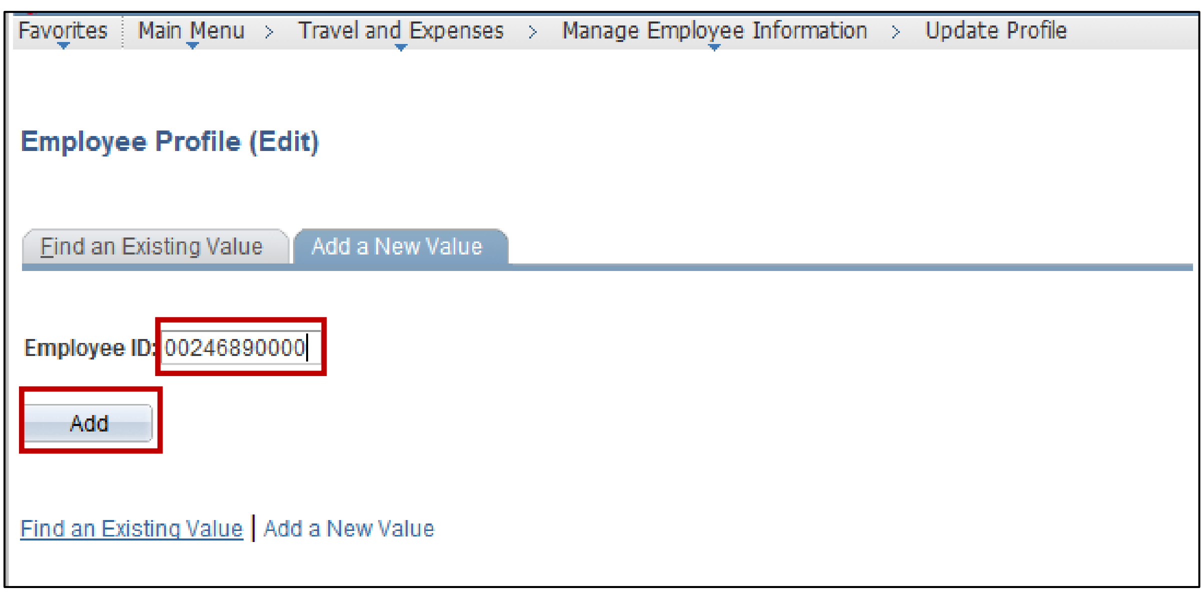
Creating a New Employee Profile:



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

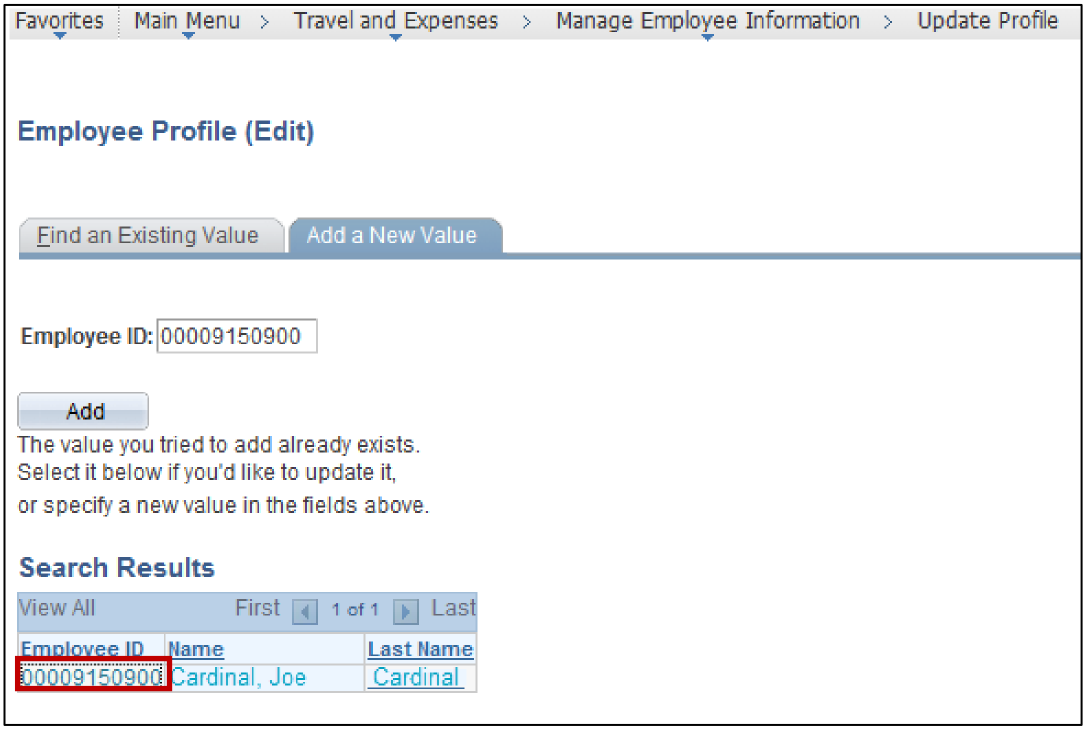
Main Menu > Travel and Expenses > Manage Employee Information > Update Profile

2 Click the **Add a New Value** tab.



3 Enter the **Employee ID** number.

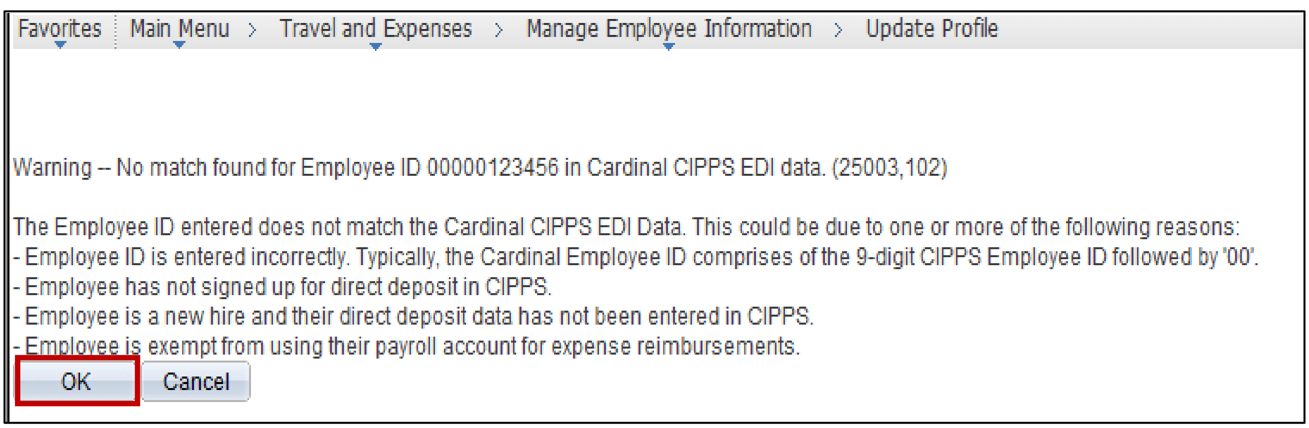
4 Click the **Add** button.



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.

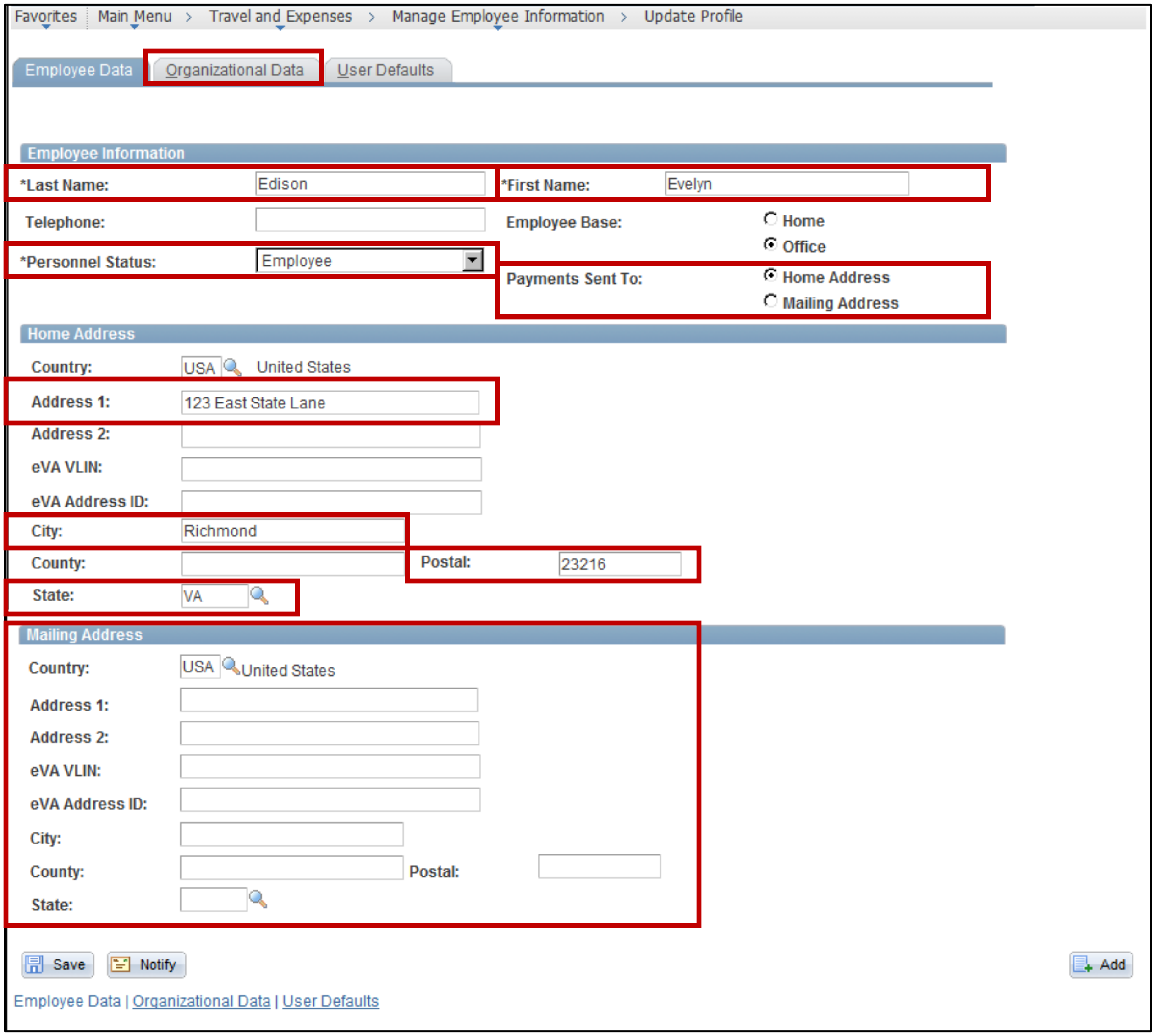
6 Click the **Employee ID** to access their profile and go the section entitled **Updating an Employee Profile** on page 8 of this job aid.

7 If the profile does not exist, go to the next step.



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.



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

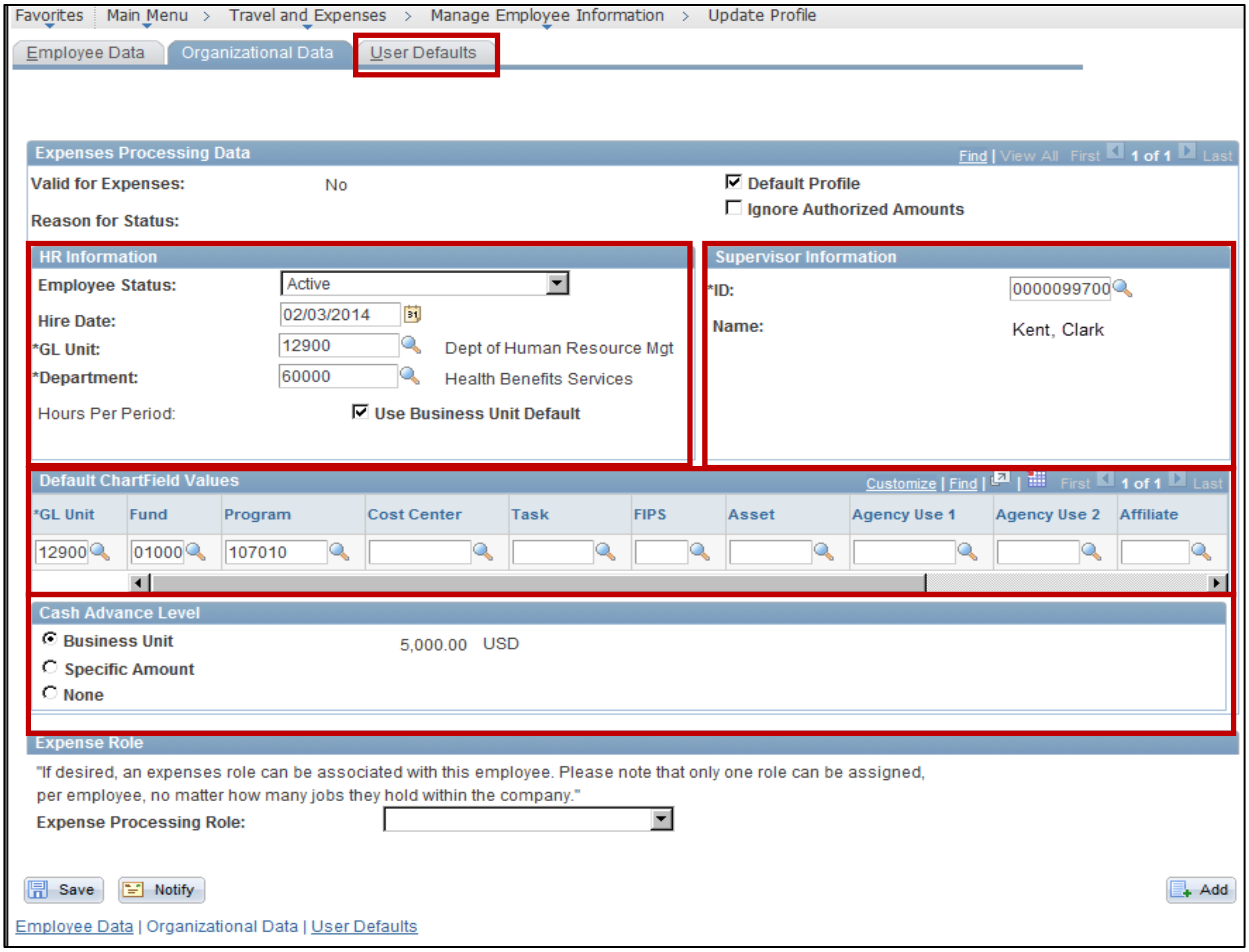
10 In the **Home Address** section of the page, enter the appropriate information:

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.



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.

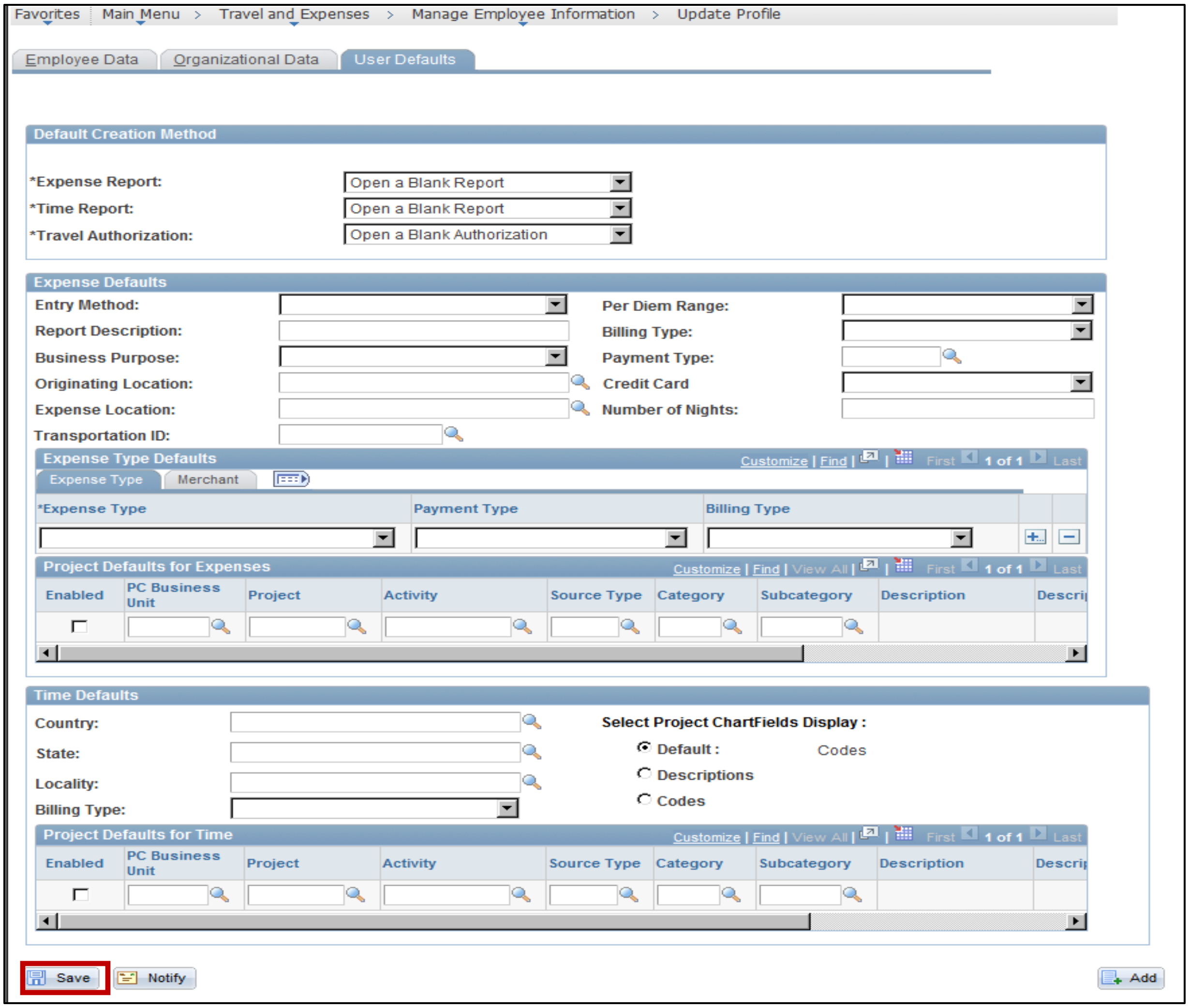
15 In the **Default ChartField Values** section of the page, enter the standard charge distribution that is used by the employee. The values entered here will automatically default when an expense transaction is created for that employee in Cardinal. The values can be updated if necessary on the expense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

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.



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.

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.

Updating an Employee Profile:

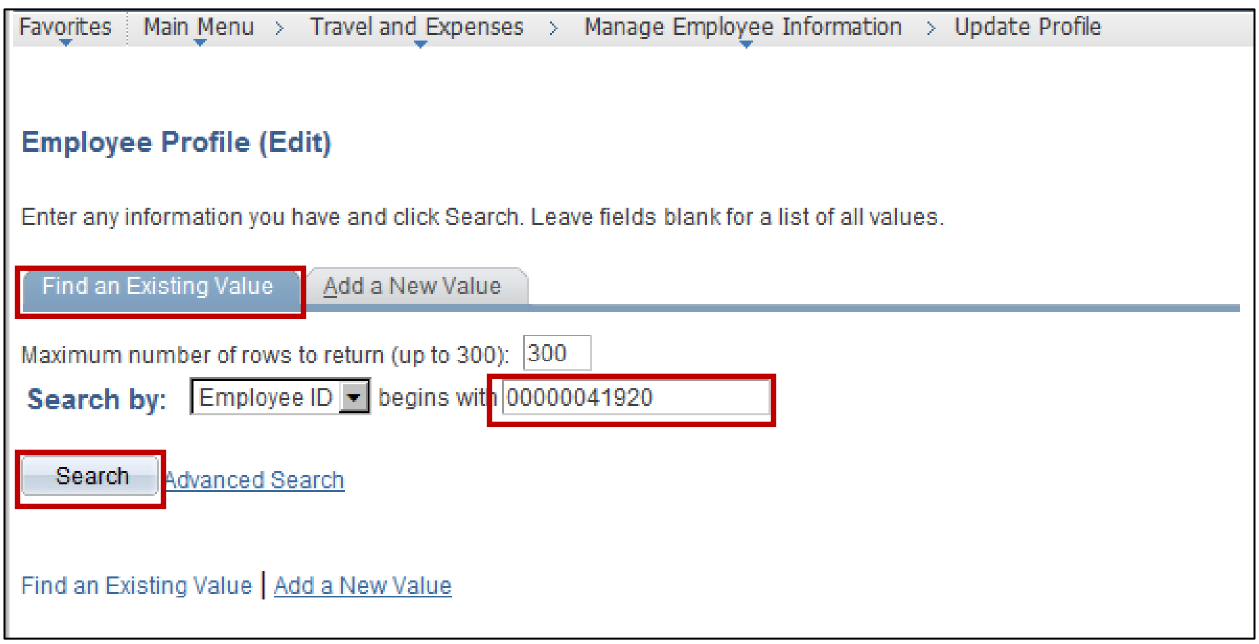
If the Employee Profile already exists, there are various reasons why you may need to update it. Review the Employee Profile Maintenance form and /or discuss with the employee to determine which scenario is applicable:

- 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:

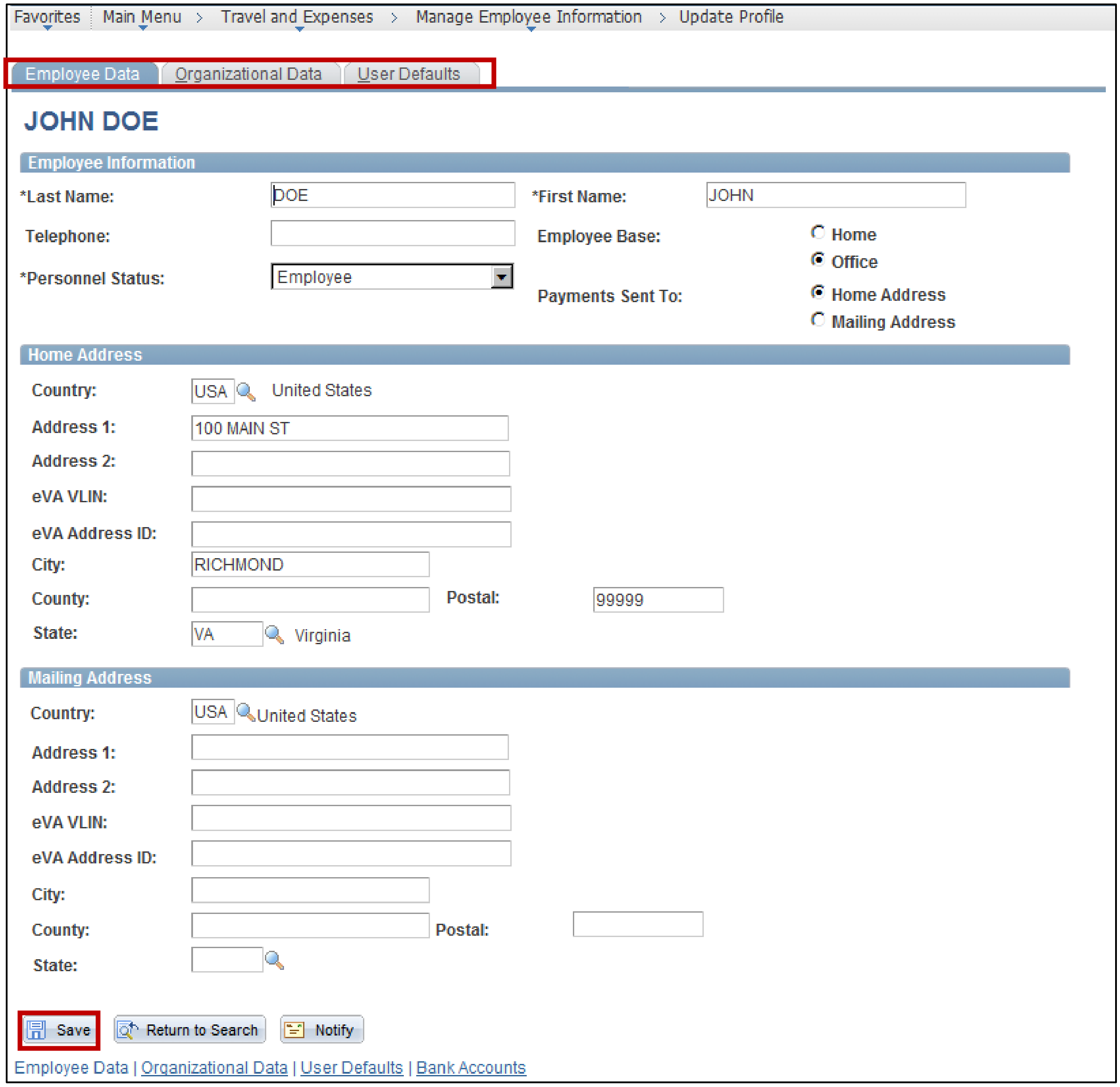
If an employee works for your agency and requires a change, access the **Employee Profile (Edit)** page using the following path:

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



1 On the **Find an Existing Value** tab, enter the **Employee ID**.

2 Click the **Search** button.



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.

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.

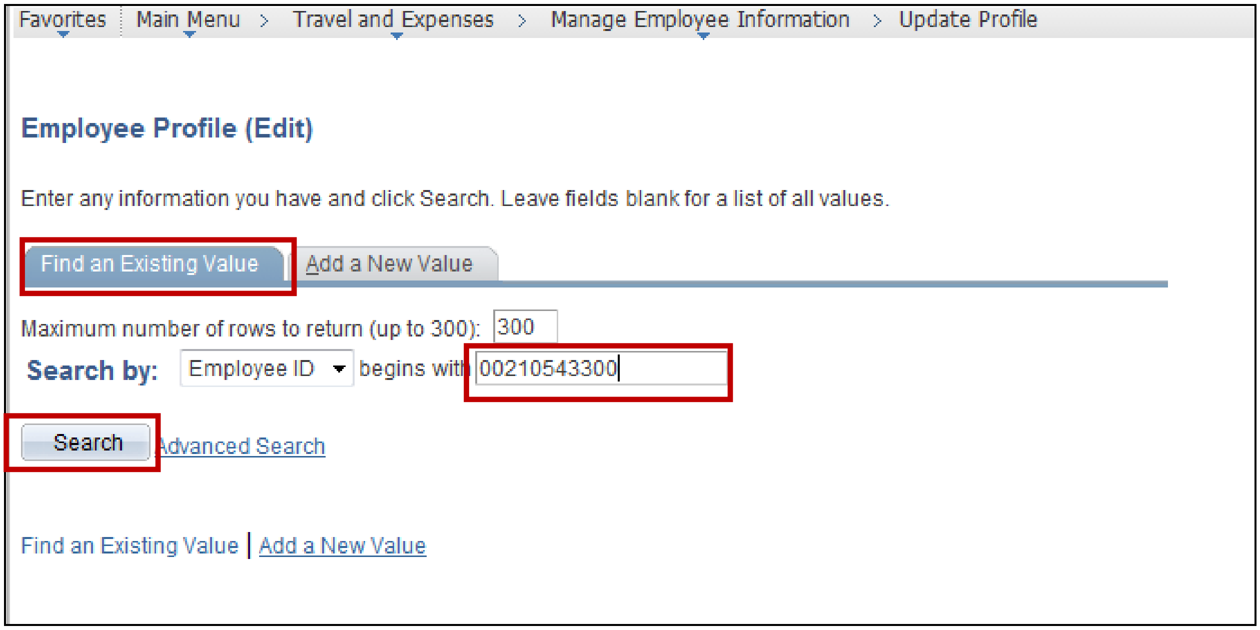
1 Open a help desk ticket addressed to Cardinal Security to request them to make changes on the employee profile. The email address for statewide requests is: vccc@vita.virginia.gov

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: XXXXXXXXXXX Please make the below update to the employee profile for XXXXXXXXXXX. 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: XXXXXXXXXXX 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: XXXXXXXXXXX New Supervisor Name: <Employee Name in Cardinal>

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:

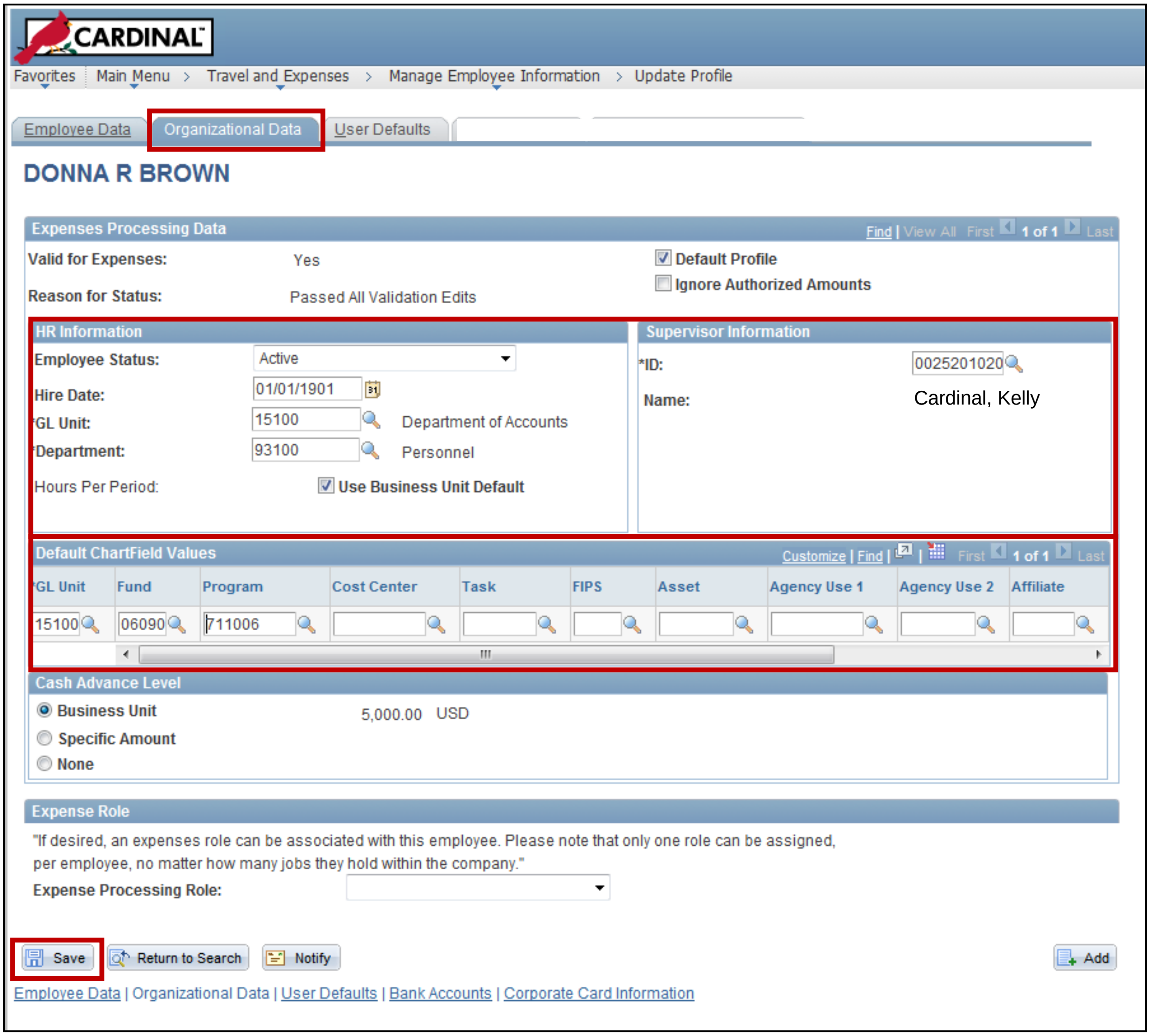
Main Menu > Travel and Expenses > Manage Employee Information > Update Profile



3 Click the **Find and Existing Value** tab.

4 Enter the **Employee ID** number.

5 Click the **Search** button.



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.

Changing an Employee Profile Status to Terminate:

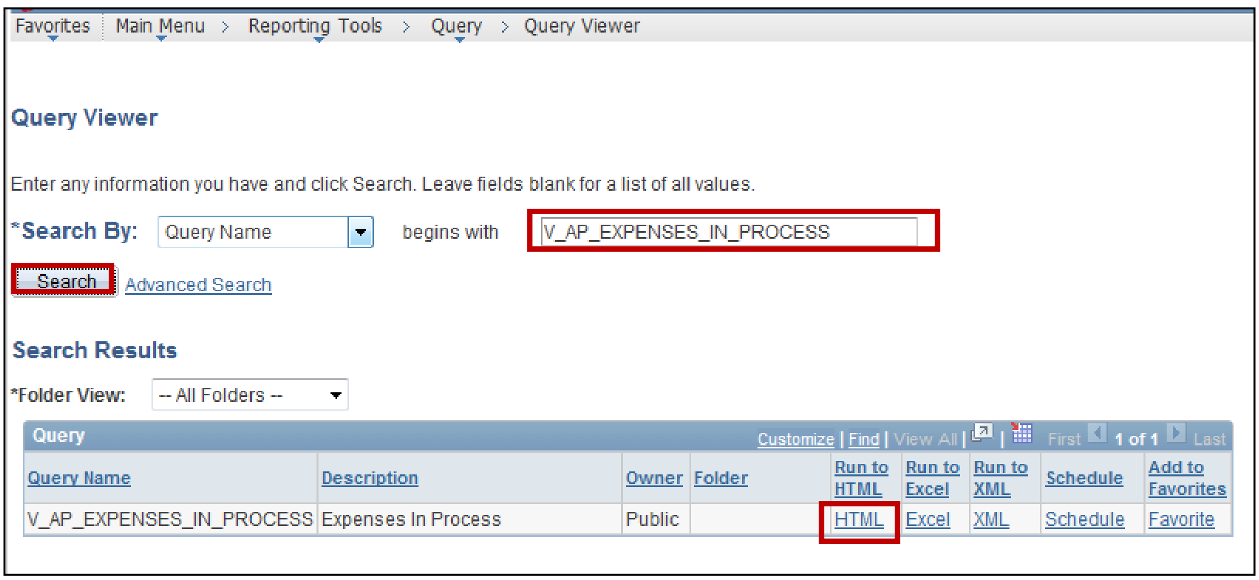
When an employee no longer works for your agency, the Employee Profile Status needs to be changed to **Terminated**. This should only occur once all Expense transactions have been either paid or deleted and there should be no items in the queue for the employee to approve.

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:

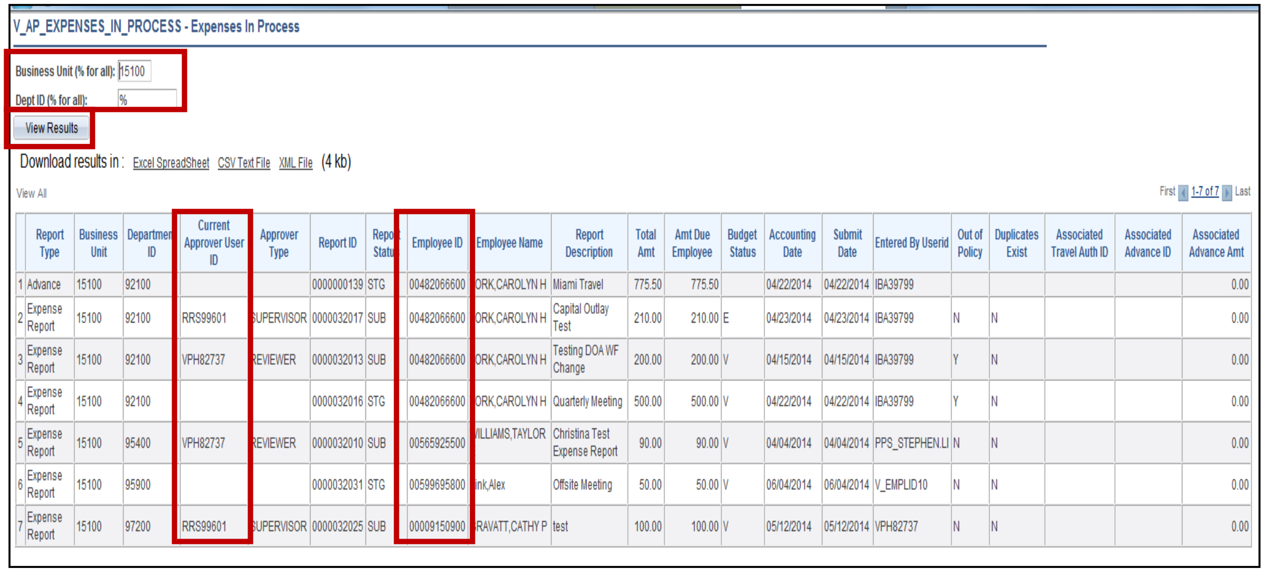
Main Menu > Reporting Tools > Query > Query Viewer



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.



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	Departmen ID	Current Approver User ID	Approver Type	Report ID	Repo Statu	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			0000000139	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	00565925500	ILLIAMS,TAYLOR	Christina Test Expense Report	90.00	90.00	V	04/04/2014	04/04/2014	PPS_STEPHEN.LI	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	RAVATT,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.

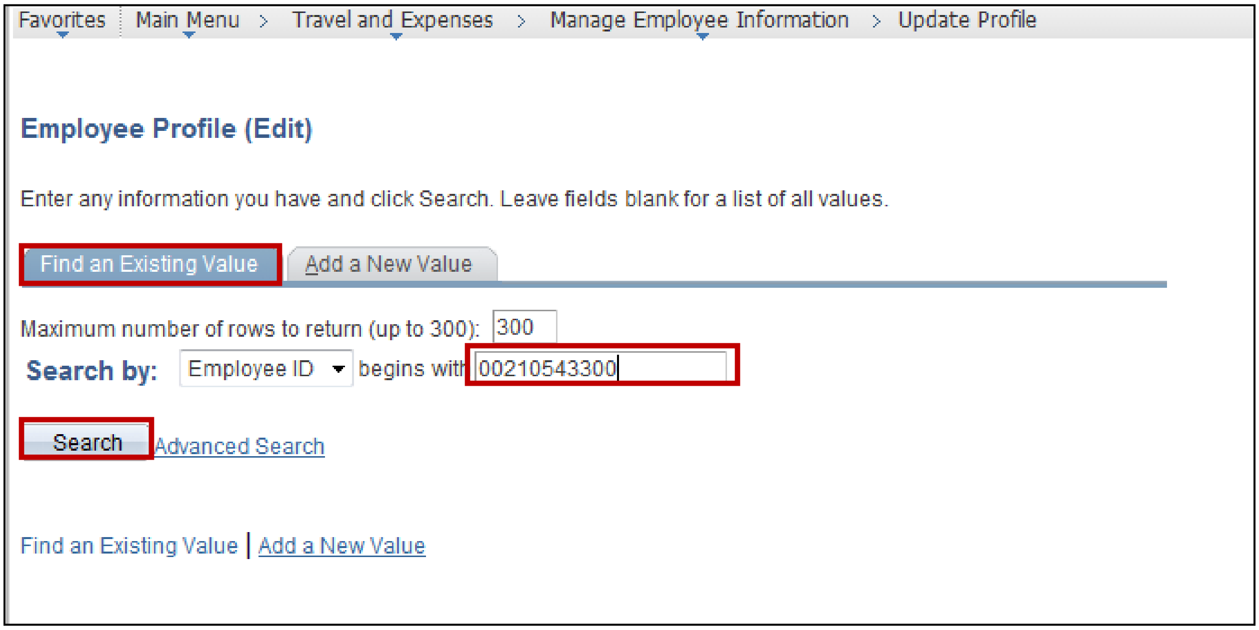
9 Review the results to determine if the employee you need to terminate has any transaction in progress. If so, ensure they are approved or deleted prior to terminating the employee in the system.

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

Terminate the employee in Cardinal:

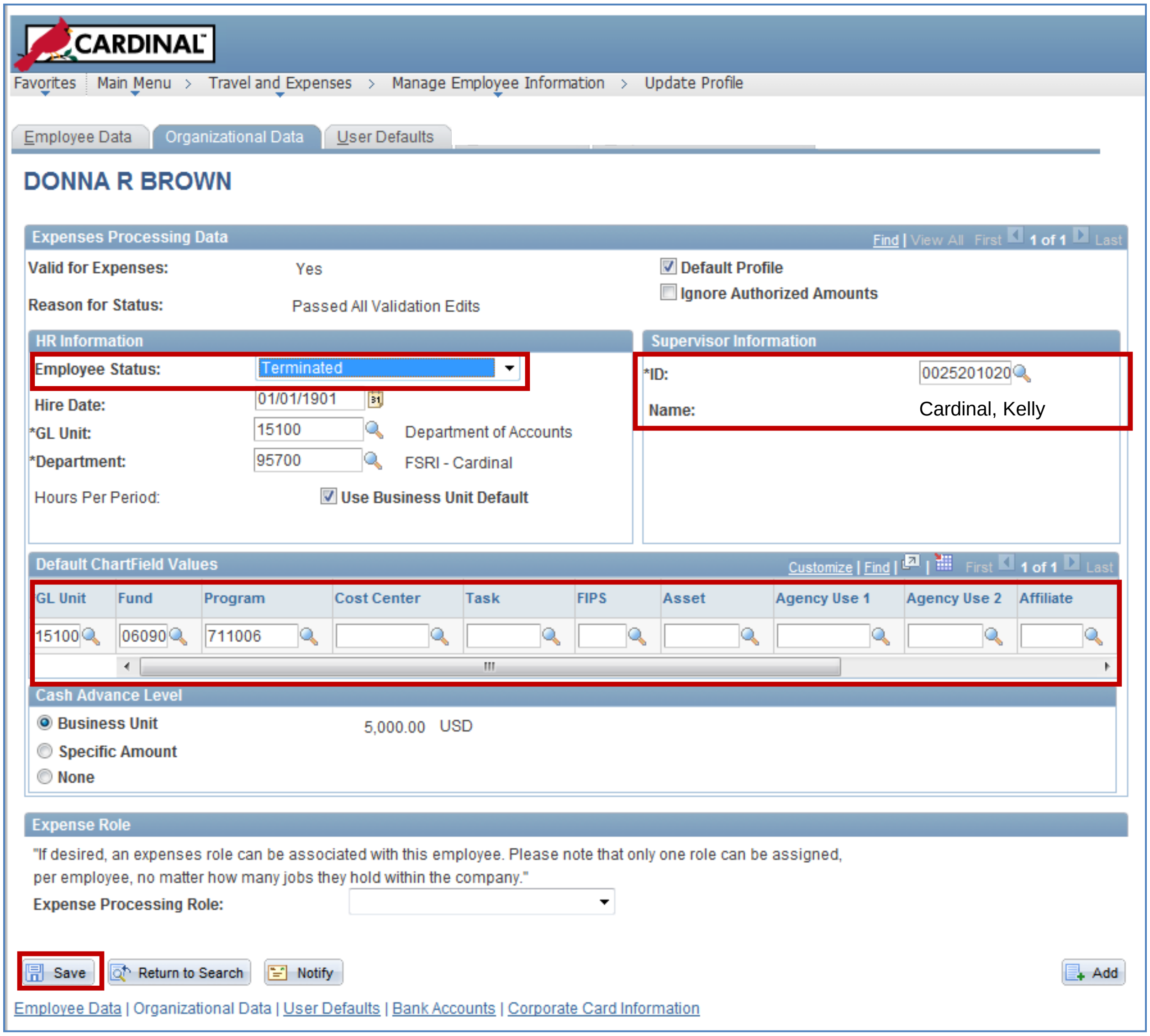
10 Navigate to the **Employee Profile (Edit)** page using the following path:

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.



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.