# SW AP316 Updating an Employee Profile

## Updating an Employee Profile Overview

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 contains the employee name, address, employee status, Agency Business Unit, department, supervisor, cash advance level, and payment information (such as EDI bank account information).

Employee Profiles are added/updated by the agency HR Administrator in Cardinal HCM and these additions/updates are synced to Cardinal Financials. Limited updates to the Employee Profile pages are permitted by agency users with the Employee Profile Sync Maintenance role.

## Adding a Proxy

In order to have expense transactions entered, every employee must have at least one proxy (authorized user) set up. After creating the employee profile, be sure to add a proxy or proxies for every employee profile created. For more detailed information about how to authorize a proxy, see the job aid entitled **AP315 Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.

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 daily from the Cardinal Human Capital Management (HCM) system. The DOA EDI Coordinators have access to enter this information when necessary (e.g., when HCM update has not yet been processed).

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### Employee Working for Multiple Cardinal Agencies

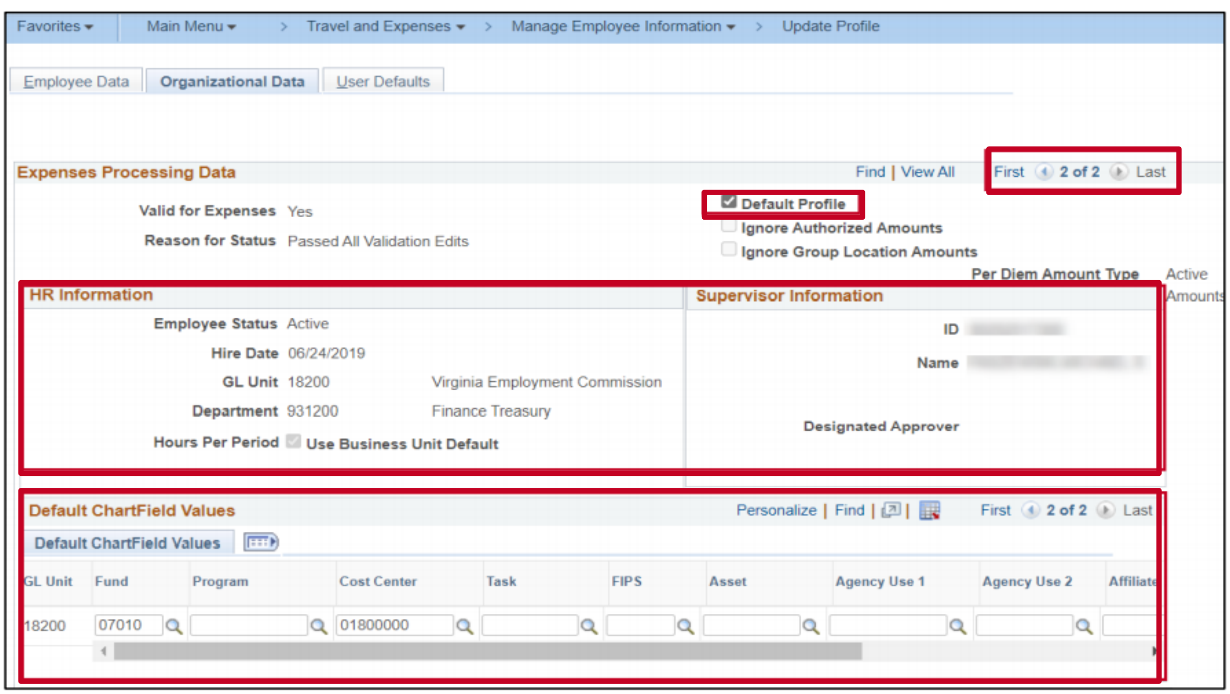
If the employee is working for more than one state agency, a profile must be created in HCM for each agency from which the employee is requesting a reimbursement of expenses:

1. Employees working in multiple agencies will be setup with one Employee Profile associated to multiple agency records reflecting each job (i.e., Employee Record Number)
2. In Cardinal HCM, each employee will only have one Cardinal Employee ID. Cardinal Employee IDs are established based on PMIS IDs in the format of (00 + 7-digit PMIS ID + 00).

Only one Employee Record Number can be set as “Default” and Expense transactions (Expenses, Travel Authorizations & Cash Advances) can only be created against the record marked as “Default”. When an agency needs to submit transactions for a different Employee Record Number (job) other than the one marked as “Default”, the “Default” check box on the Employee Profile must be updated accordingly before creating the transactions.

The screenshot provided below highlights the key changes of the HCM impacts to the “Organizational Data” tab for the Employee Profile page:

- Multiple Employee Records
- Default Profile flag (can be updated to the record of expense transaction)
- HR and Supervisor information are synced from HCM and therefore are grayed out. Supervisor information is based on “Reports To” from HCM and cannot be modified
- Default ChartField Values can be updated as needed



## Updating an Employee Profile

If the Employee Profile already exists, there are various reasons why it may need to be updated.

The edits to the Employee Profile for these three scenarios would need to be made by the HR Administrator in Cardinal HCM:

- Employee works for your agency and requires changes (e.g., moves to another department, assigned to a new supervisor, etc.).
- Employee moves from one state agency to another state agency.
- Employee leaves your agency and you need to update the status to terminate.

These edits to the Employee Profile are made by an employee with the Employee Profile Sync Maintenance role:

- Update the "Default ChartField Values" section on the Employee Profile Organizational Data page
- Update information on the "User Defaults" page
- Changing the "Default" flag for employees with multiple records so that the expenses can be submitted by the related agency

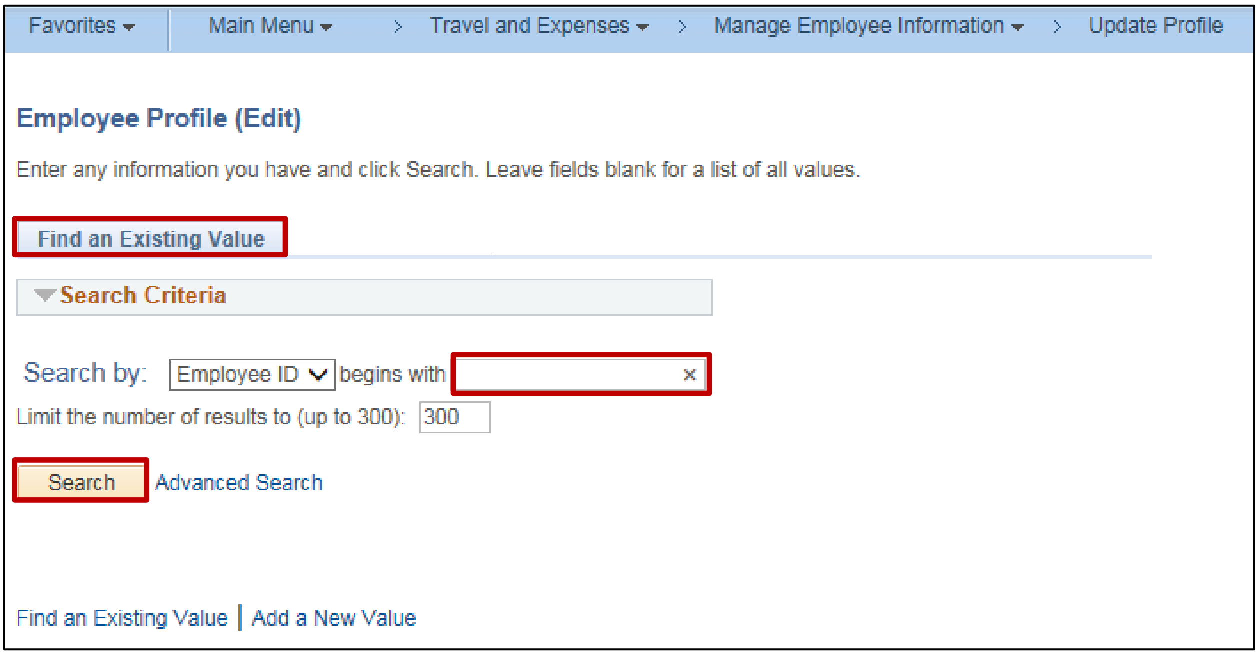
## Updating the Default Chartfield Values and User Defaults

The “Default ChartfField Values” section is updated on the Employee Profile Organization Data page and information may also be updated on the “User Defaults” page.

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

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

The **Employee Profile (Edit) Search** page displays.

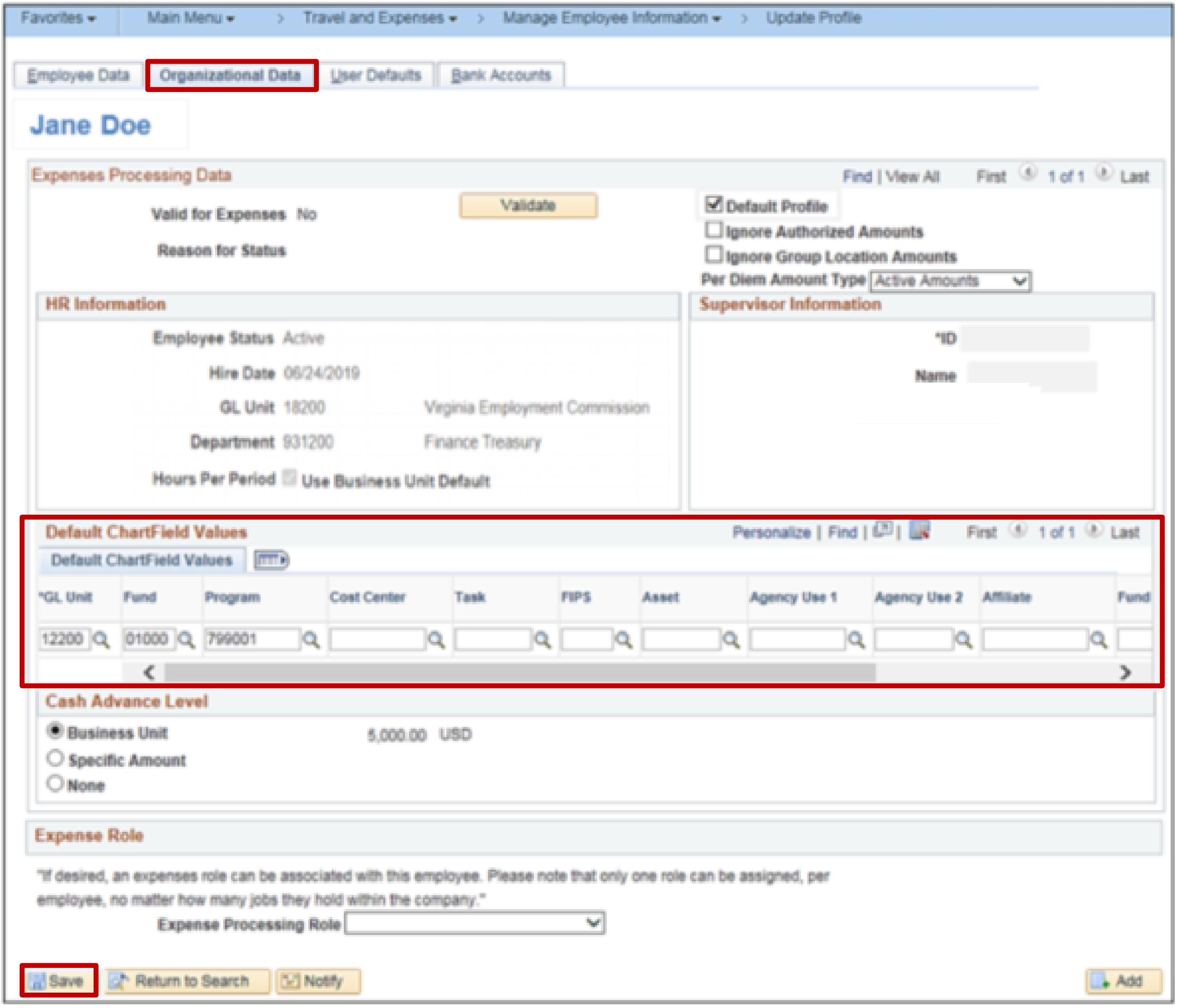



**2.** Click the **Find an Existing Value** tab.

**3.** Enter the **Employee ID** number.

**4.** Click the **Search** button.

The **Employee Profile** page displays.



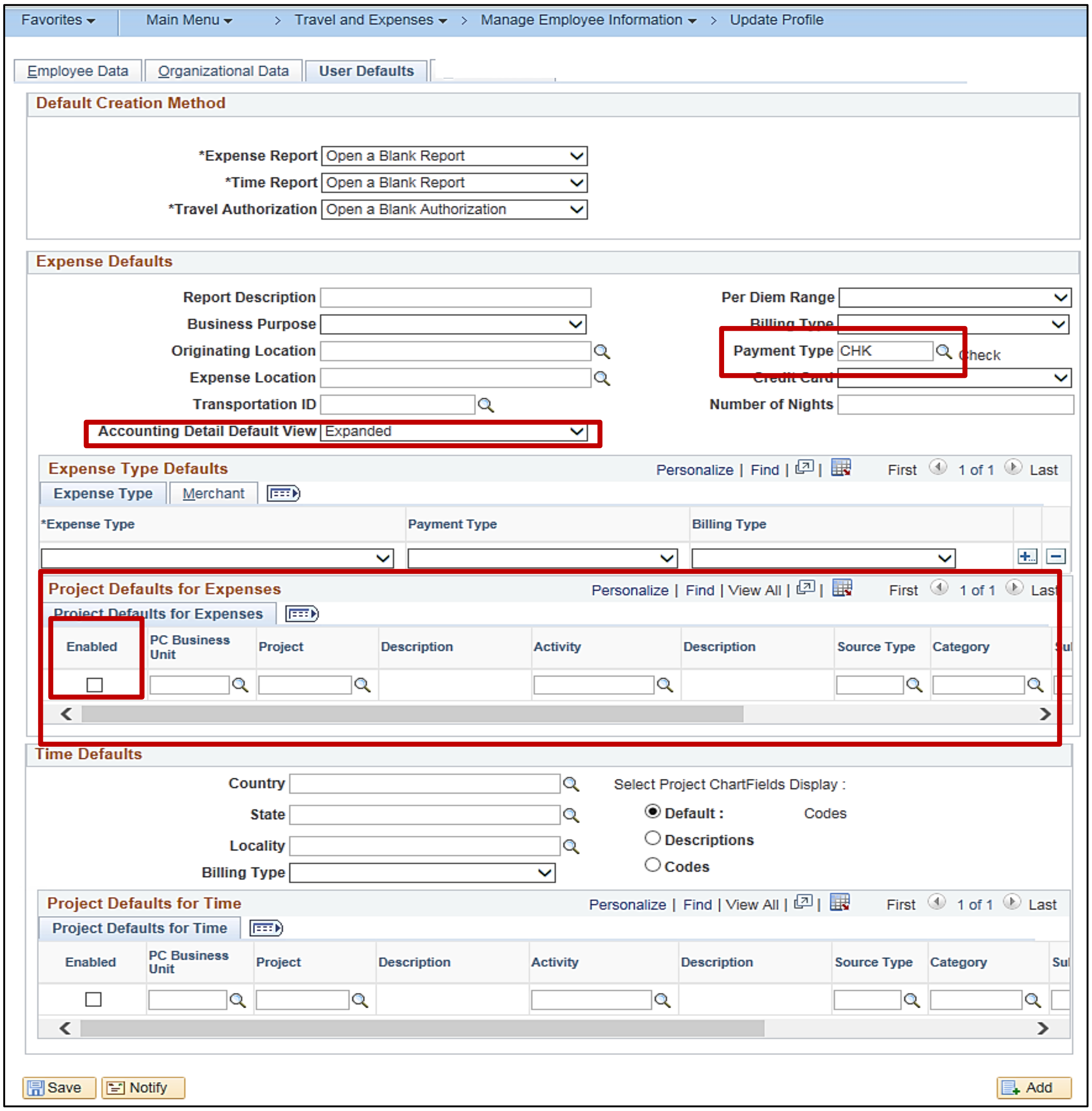

**5.** Click the **Organizational Data** tab.

**6.** Update the **Default ChartField Values** with those from your Business Unit.

**7.** Click on the **User Defaults** tab.

**Note**: These are defaults only and can be changed during data entry.

The **User Default** tab page displays.




**8.** Make any necessary updates to specify defaults that reduce data entry time for Travel Authorizations, Cash Advances, and Expense Reports. The **Time Defaults** fields are not used.

**9.** Select **Payment Type** of **Check** in the **Expense Defaults** section to avoid having to key this value on every expense line.

**10.** Select **Expanded** in the **Accounting Detail Default View** field to display the Accounting Detail section on the Expense Report or Travel Authorization as opened instead of having to click to open.

**Note**: Project ChartFields can be defaulted in the **Project Defaults for Expenses** section.

11. Click the **Enabled** checkbox so these values default on the Travel Authorization and Expense Report.

12. Click the **Save** button.

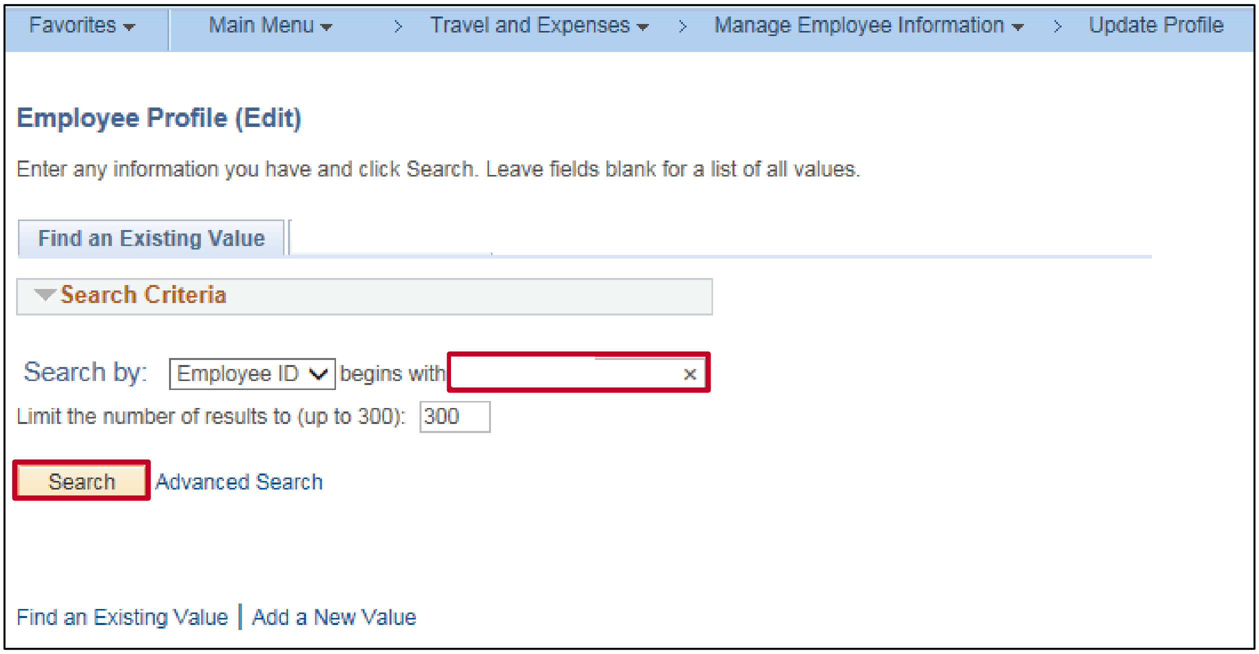
    **Note:** Review edits on the Employee Profile Expense Employee synced from HCM to Cardinal Financials (FIN). For additional information, please contact your HR Administrator or refer to Job Aid titled **HR351 Managing an Inter-Agency Transfer** located on the Cardinal Website in **Job Aids** under **Learning**.

## Changing the Employee Profile “Default” flag

If an employee has multiple employee records, change the default flag for the submitting agency so that the expenses can be submitted by the related agency.

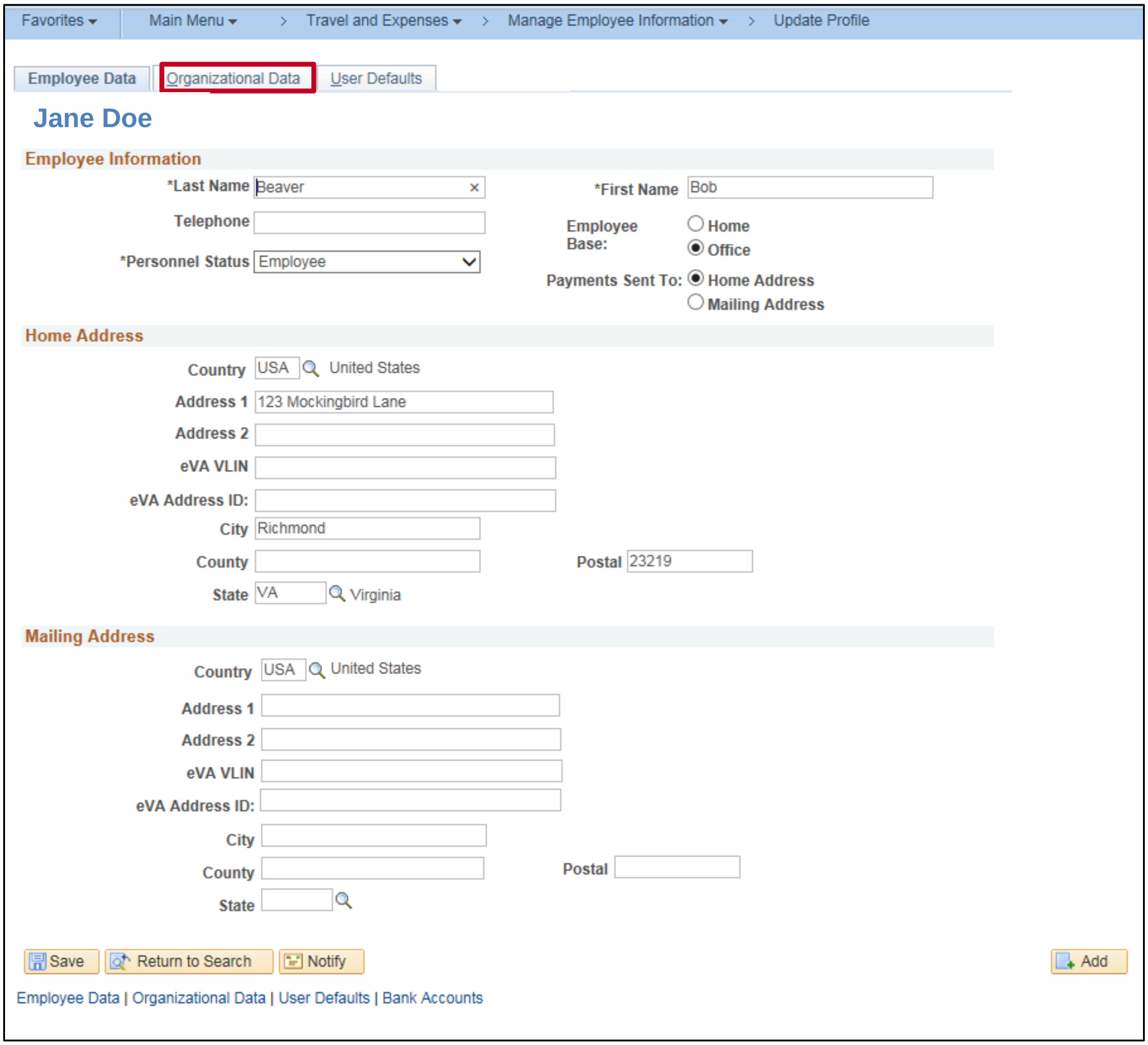
Navigate to the **Update Profile** page by using this path:

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



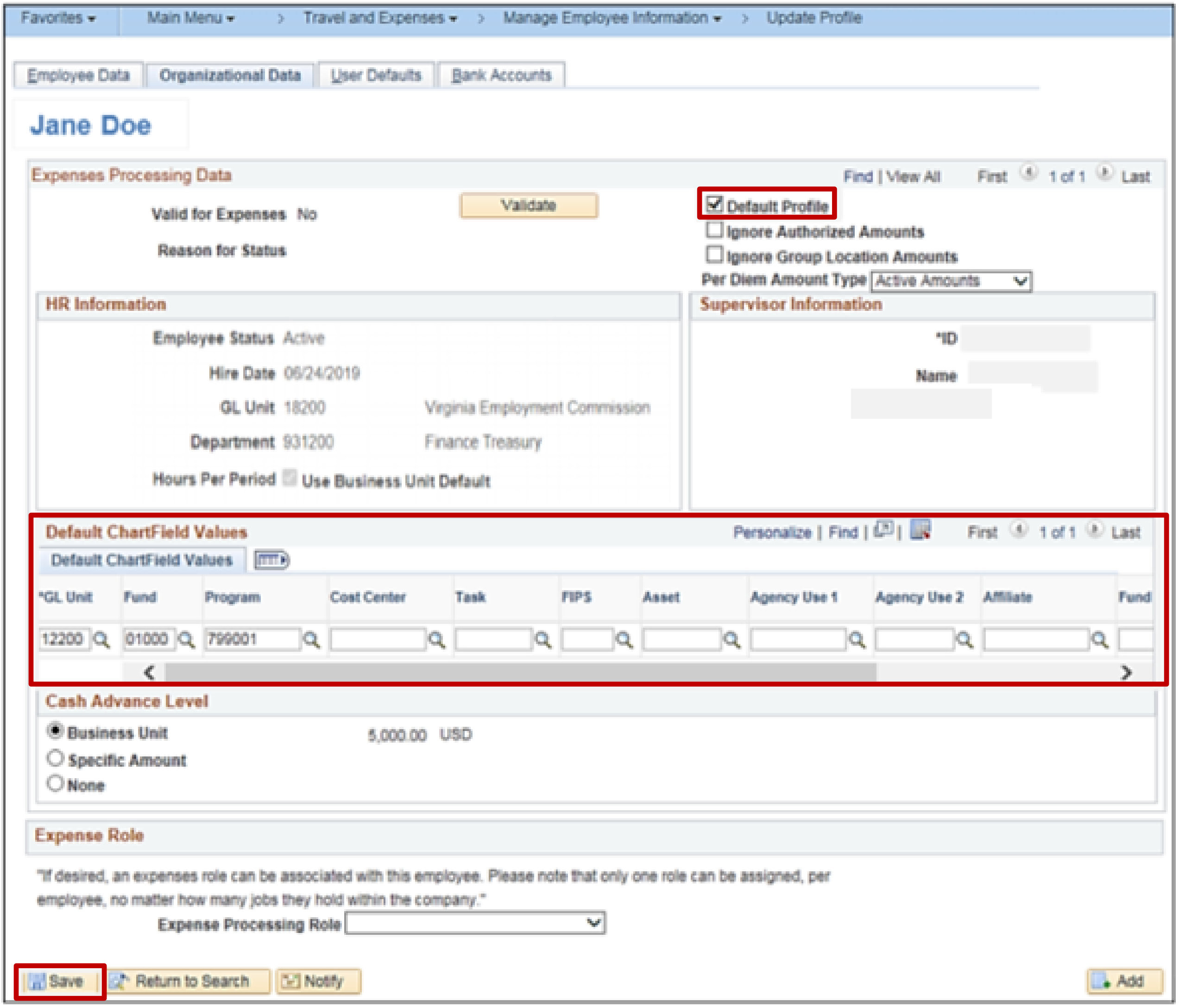

1. Enter the **Employee ID**.
2. Click the **Search** button.

Thte Employee Profile page displays.




**3.** Click the **Organizational Data** tab.

The **Organizational Data** tab displays.




**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.

**Example: If an employee is leaving Agency A and moving to Agency B**

**Agency A** must:

- Have the HR Admniistrator change the employee status on the profile to Terminated for your agency.
- If this employee is a Supervisor (approving other employee's expenses at your agency), have the HR Admniistrator remove the employee from the Supervisor role for all impacted employees and update with new Supervisor.
- Delete all proxies for that employee. For more details, see the Job Aid titled **SW AP315 Authorizing a Proxy for an Employee** located on the Cardinal Website in **Job Aids** under **Learning**.

**Agency B** must:

- With the implementation of Cardinal Human Capital Management (HCM), Expense Employee profile information will be synced from HCM to Cardinal Financials (FIN)
- Add a proxy/proxies for the employee. For more details, see the Job Aid titled **SW AP315 Authorizing a Proxy for an Employee** located on the Cardinal Website in **Job Aids** under **Learning**.

## Changing an Employee Profile Status to Terminated

When an employee no longer works for your agency, there are some necessary steps to take before the Employee Profile Status is changed to **Terminated**. You will need to verify all Expense transactions have been either paid or deleted, and there are no items in the queue for the employee to approve. After this verification, then contact the HR Administrator for HCM to update the Employee Profile to show the employee as **Terminated.**

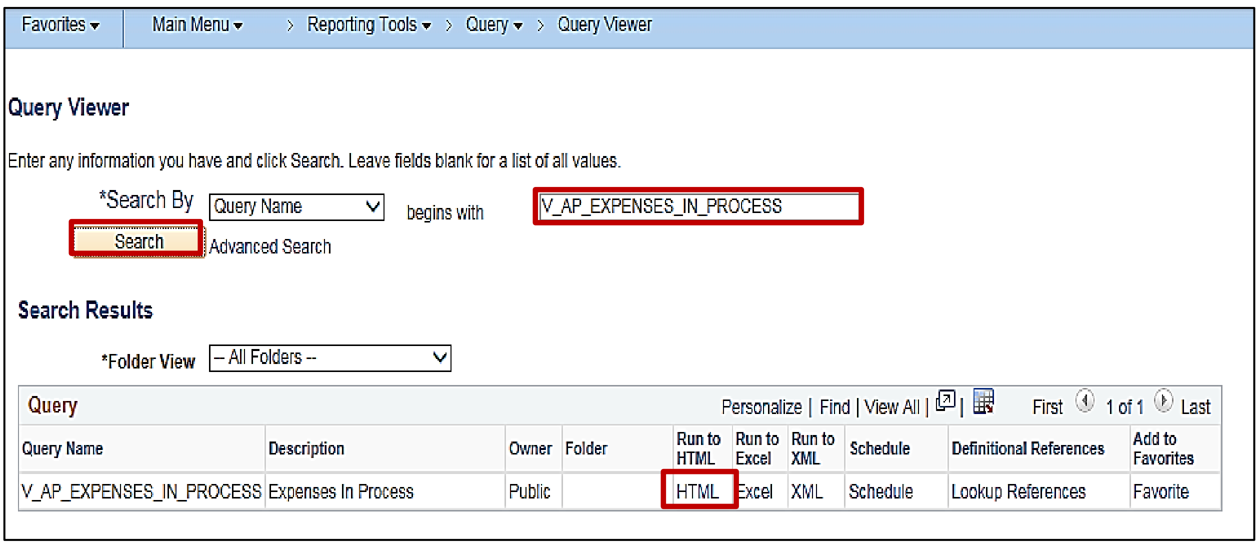
### Verify there are no pending transactions

**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 **Query Viewer** page displays.

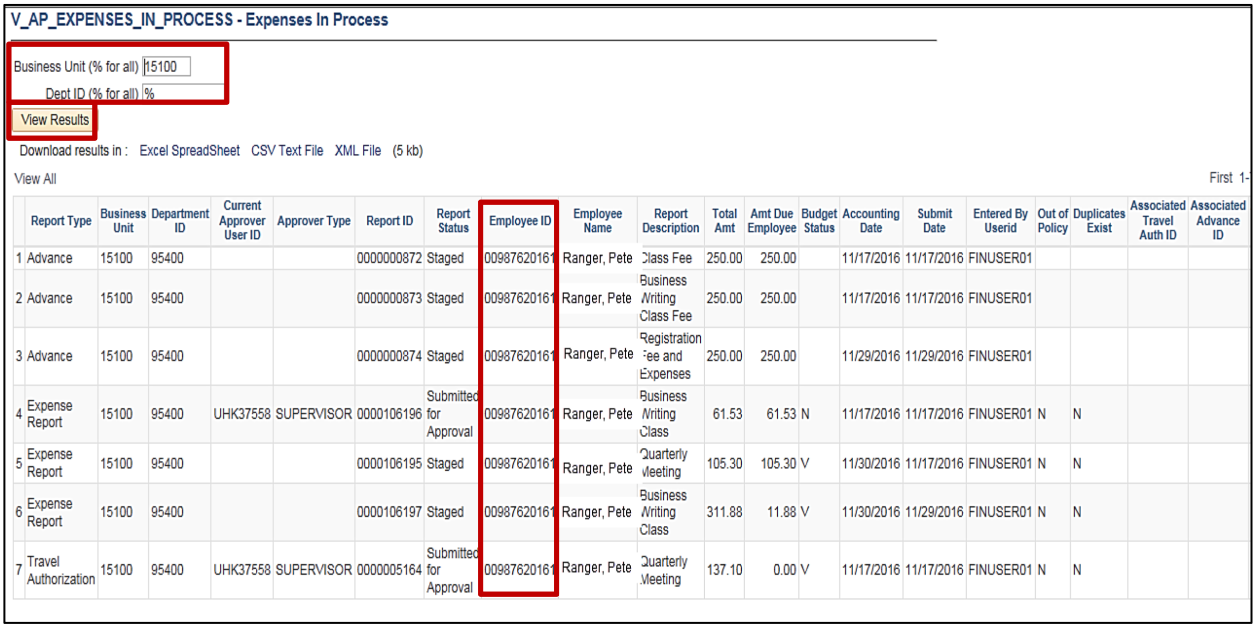



**3.** Enter the Query Name **V_AP_EXPENSES_IN_PROCESS**.

**4.** Click the **Search** button.

**5.** The **Query Name** displays in the **Search Results** section of the page. Click the **HTML** link.

The **Expenses in Process** query displays.



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 (5 kb)

View All

First 1-

| | Report Type | Business Unit | Department ID | Current Approver User ID | Approver Type | Report ID | Report 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Advance | 15100 | 95400 | | | 0000000872 | Staged | 00987620161 | Ranger, Pete | Class Fee | 250.00 | 250.00 | | 11/17/2016 | 11/17/2016 | FINUSER01 | | | | |
| 2 | Advance | 15100 | 95400 | | | 0000000873 | Staged | 00987620161 | Ranger, Pete | Business Writing Class Fee | 250.00 | 250.00 | | 11/17/2016 | 11/17/2016 | FINUSER01 | | | | |
| 3 | Advance | 15100 | 95400 | | | 0000000874 | Staged | 00987620161 | Ranger, Pete | Registration Fee and Expenses | 250.00 | 250.00 | | 11/29/2016 | 11/29/2016 | FINUSER01 | | | | |
| 4 | Expense Report | 15100 | 95400 | UHK37558 | SUPERVISOR | 0000106196 | Submitted for Approval | 00987620161 | Ranger, Pete | Business Writing Class | 61.53 | 61.53 | N | 11/17/2016 | 11/17/2016 | FINUSER01 | N | N | | |
| 5 | Expense Report | 15100 | 95400 | | | 0000106195 | Staged | 00987620161 | Ranger, Pete | Quarterly Meeting | 105.30 | 105.30 | V | 11/30/2016 | 11/17/2016 | FINUSER01 | N | N | | |
| 6 | Expense Report | 15100 | 95400 | | | 0000106197 | Staged | 00987620161 | Ranger, Pete | Business Writing Class | 311.88 | 11.88 | V | 11/30/2016 | 11/29/2016 | FINUSER01 | N | N | | |
| 7 | Travel Authorization | 15100 | 95400 | UHK37558 | SUPERVISOR | 0000005164 | Submitted for Approval | 00987620161 | Ranger, Pete | Quarterly Meeting | 137.10 | 0.00 | V | 11/17/2016 | 11/17/2016 | FINUSER01 | N | N | | |

**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 the transaction(s) 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 start the process to terminate the employee in Cardinal.

### Terminate the employee in Cardinal

Contact the HR Administrator for Cardinal HCM to update the Employee Profile to show the employee as **Terminated**.