

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

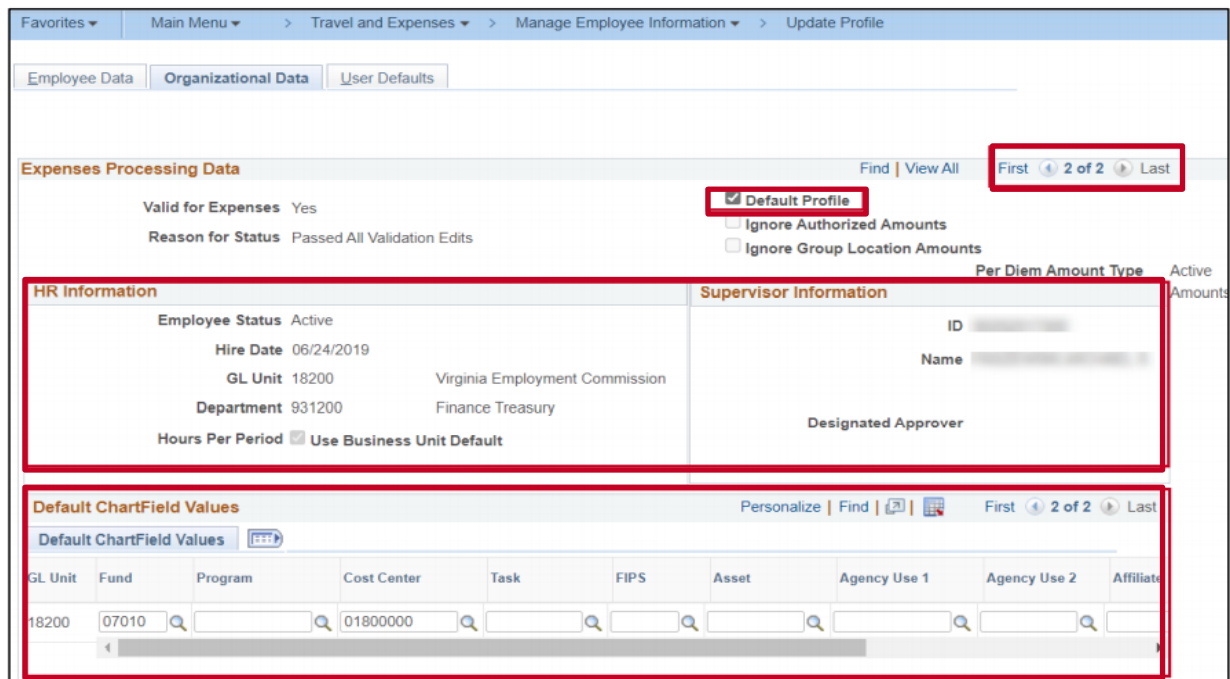
If the employee is working for more than one state agency, a profile must be created in HCM for each agency from which the employee is requesting a reimbursement of expenses:

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



The screenshot shows the 'Update Profile' page in the HCM system. The 'Organizational Data' tab is selected. The 'Expenses Processing Data' section includes a 'Default Profile' checkbox which is checked. Below this, there are sections for 'HR Information' and 'Supervisor Information', both of which are grayed out. At the bottom, there is a 'Default ChartField Values' table with columns for GL Unit, Fund, Program, Cost Center, Task, FIPS, Asset, Agency Use 1, Agency Use 2, and Affiliates. The table contains one row of data with values: 18200, 07010, [blank], 01800000, [blank], [blank], [blank], [blank], [blank], [blank].

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

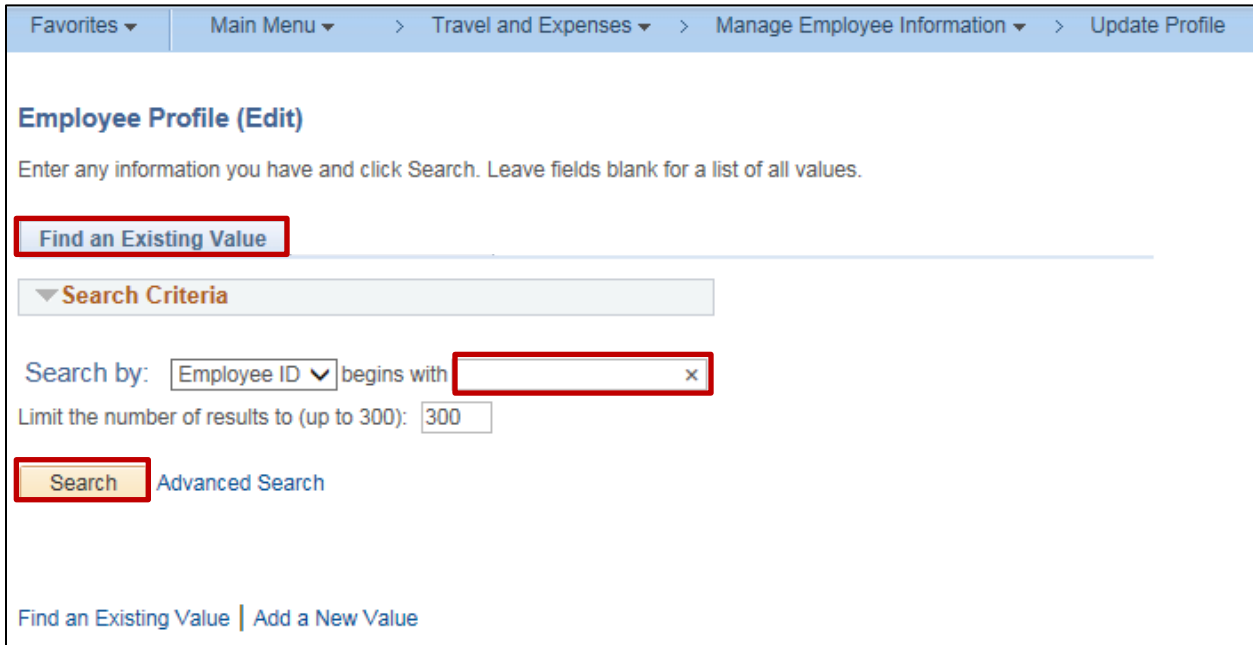
Updating the Default Chartfield Values and User Defaults

The “Default ChartField 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:

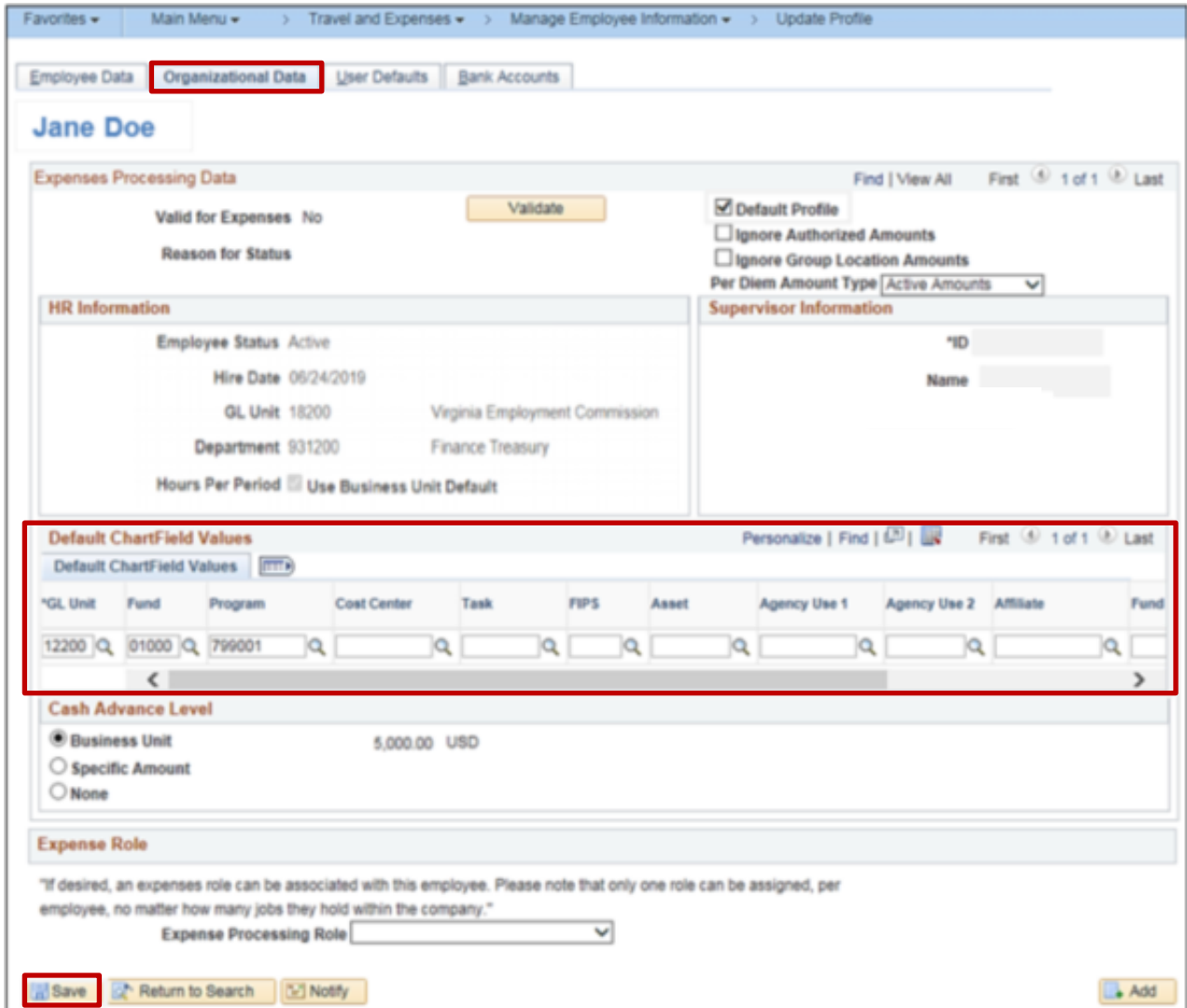
Main Menu > Travel and Expenses > Manage Employee Information > Update Profile

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.



Employee Data **Organizational Data** User Defaults Bank Accounts

Jane Doe

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

Valid for Expenses No Validate Default Profile
Reason for Status Ignore Authorized Amounts
 Ignore Group Location Amounts
Per Diem Amount Type Active Amounts

HR Information				Supervisor Information	
Employee Status	Active			*ID	
Hire Date	06/24/2019			Name	
GL Unit	18200	Virginia Employment Commission			
Department	931200	Finance Treasury			
Hours Per Period	<input type="checkbox"/> Use Business Unit Default				

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

*GL Unit	Fund	Program	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	Affiliate	Fund
12200	01000	799001								

Cash Advance Level
 Business Unit 5,000.00 USD
 Specific Amount
 None

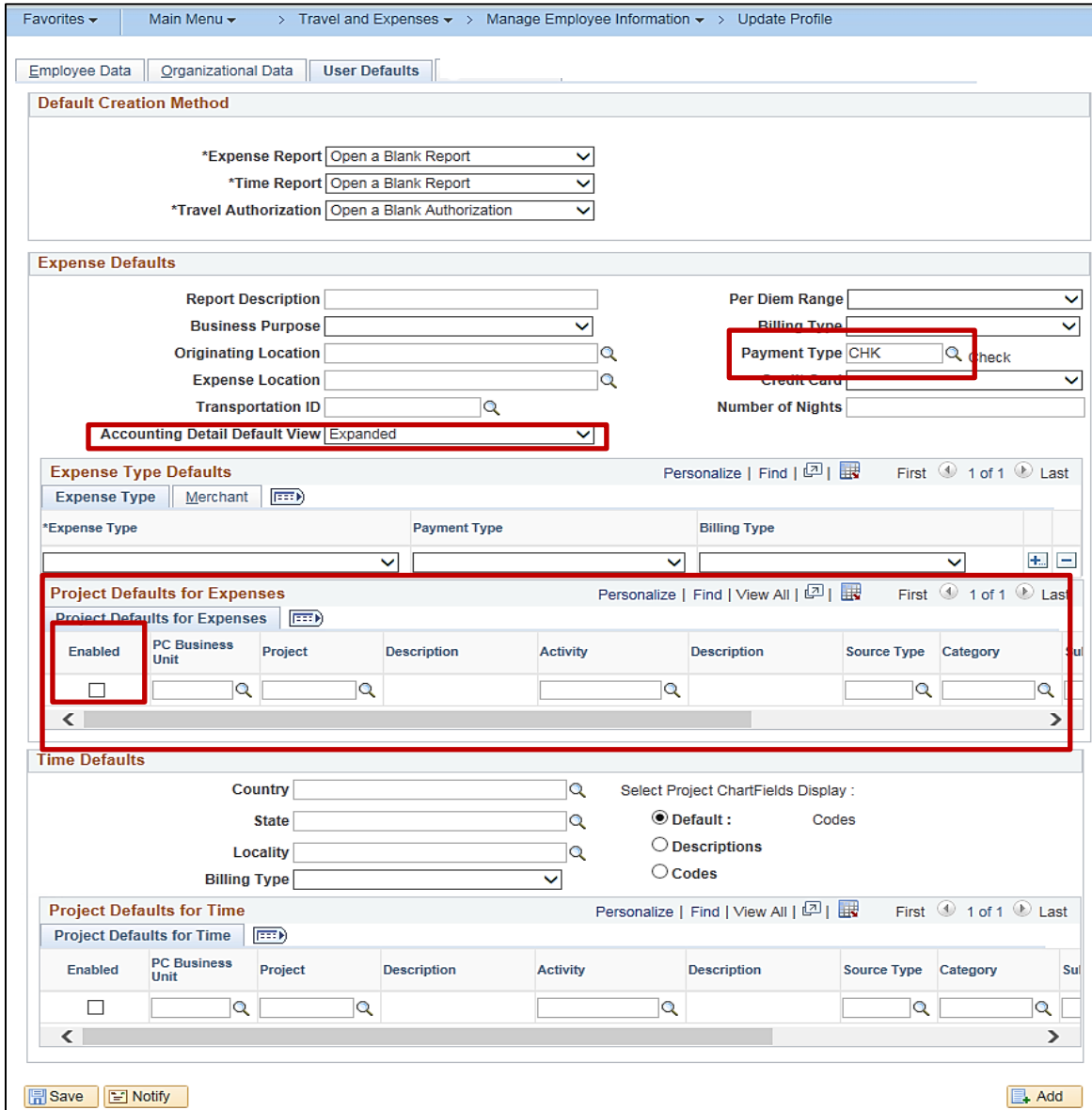
Expense Role
If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company.
Expense Processing Role

Save Return to Search Notify Add

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.



The screenshot shows the 'Update Profile' page for an employee, with the 'User Defaults' tab selected. The page is organized into several sections:

- Default Creation Method:** Contains three dropdown menus: '*Expense Report' (Open a Blank Report), '*Time Report' (Open a Blank Report), and '*Travel Authorization' (Open a Blank Authorization).
- Expense Defaults:** Contains various input fields and dropdowns. A red box highlights the 'Payment Type' dropdown, which is set to 'CHK'. Another red box highlights the 'Accounting Detail Default View' dropdown, which is set to 'Expanded'.
- Expense Type Defaults:** A table with columns for 'Expense Type', 'Payment Type', and 'Billing Type'. The 'Merchant' tab is selected.
- Project Defaults for Expenses:** A table with columns for 'Enabled', 'PC Business Unit', 'Project', 'Description', 'Activity', 'Description', 'Source Type', and 'Category'. A red box highlights the 'Enabled' checkbox, which is currently unchecked.
- Time Defaults:** Contains input fields for 'Country', 'State', and 'Locality', and a 'Billing Type' dropdown. It also includes a 'Select Project ChartFields Display' section with radio buttons for 'Default: Codes', 'Descriptions', and 'Codes'.

At the bottom of the page, there are 'Save', 'Notify', and 'Add' buttons.

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.

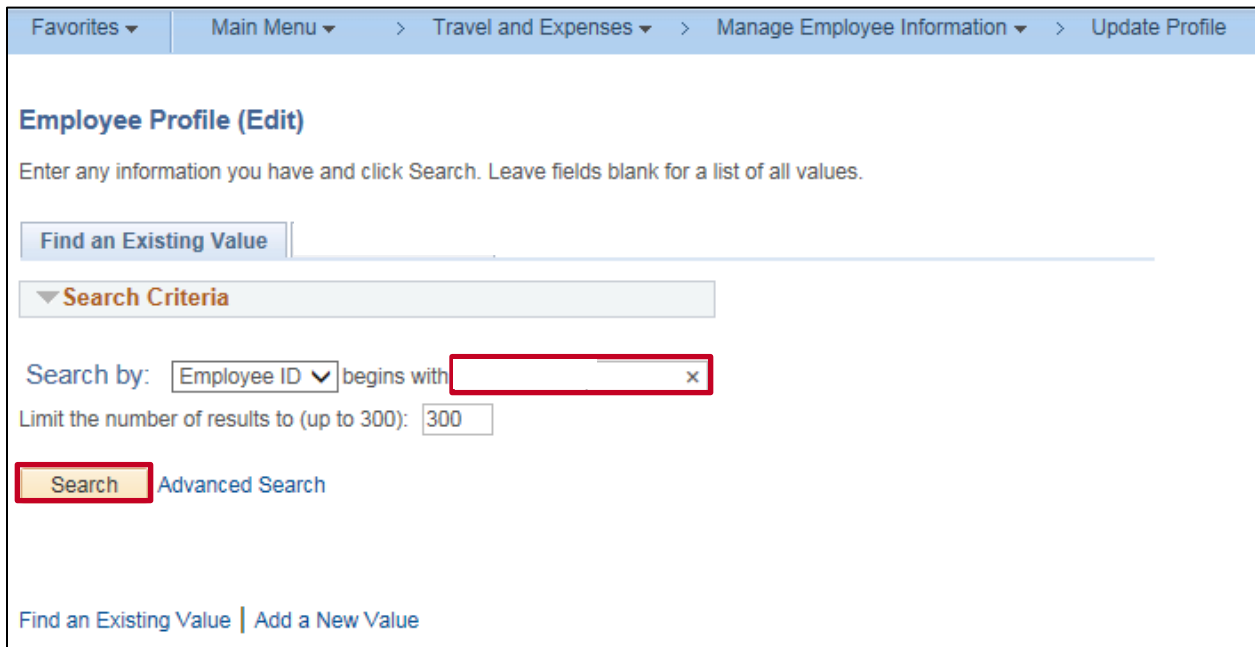
Note: Review edits on the Employee Profile Expense Employee synced from HCM to Cardinal Financials (FIN). For additional information, please contact your HR Administrator or refer to Job Aid titled **HR351 Managing an Inter-Agency Transfer** located on the Cardinal Website in **Job Aids** under **Learning**.

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



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

▼ Search Criteria

Search by: Employee ID begins with

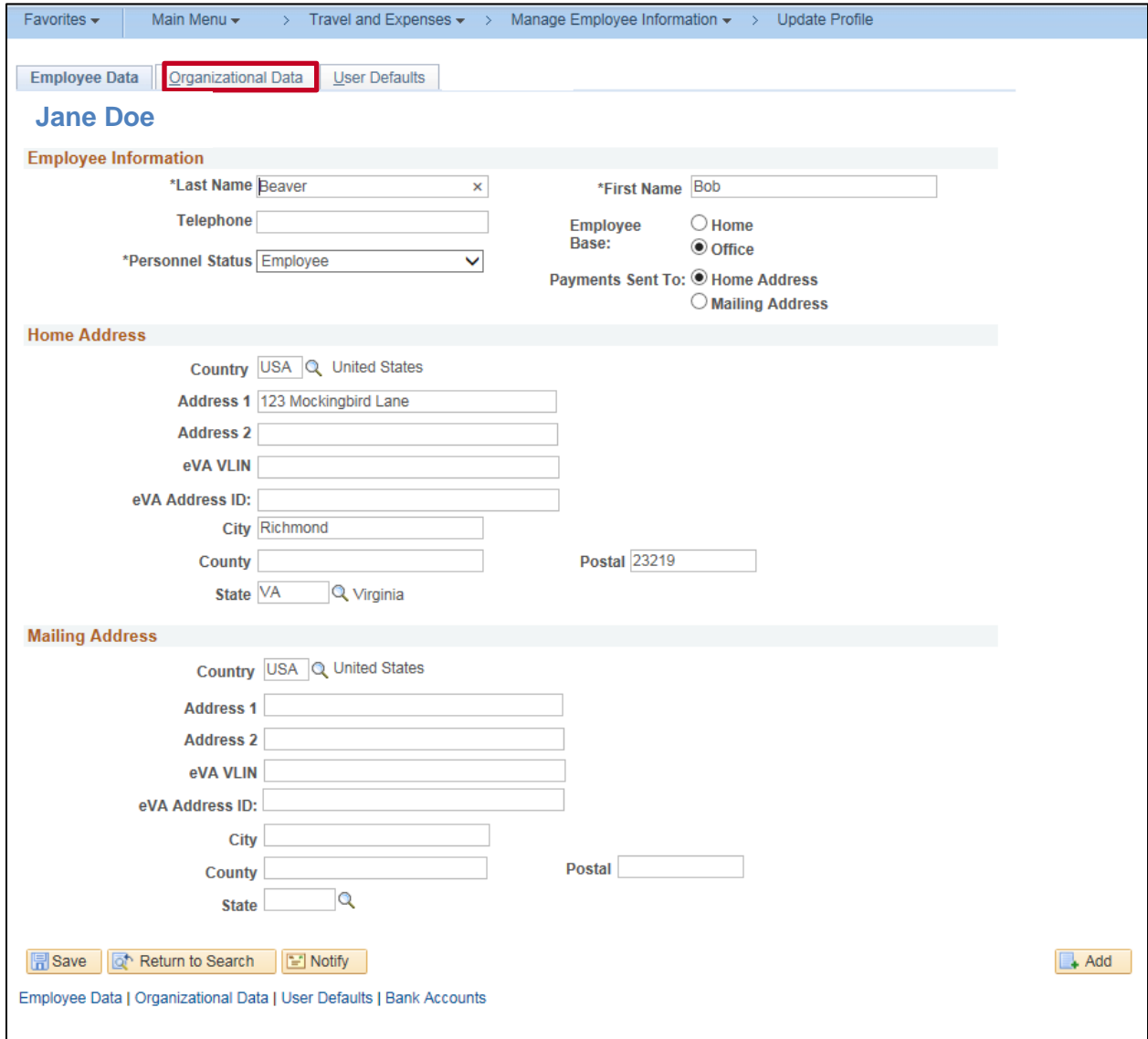
Limit the number of results to (up to 300):

Search Advanced Search

Find an Existing Value | Add a New Value

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

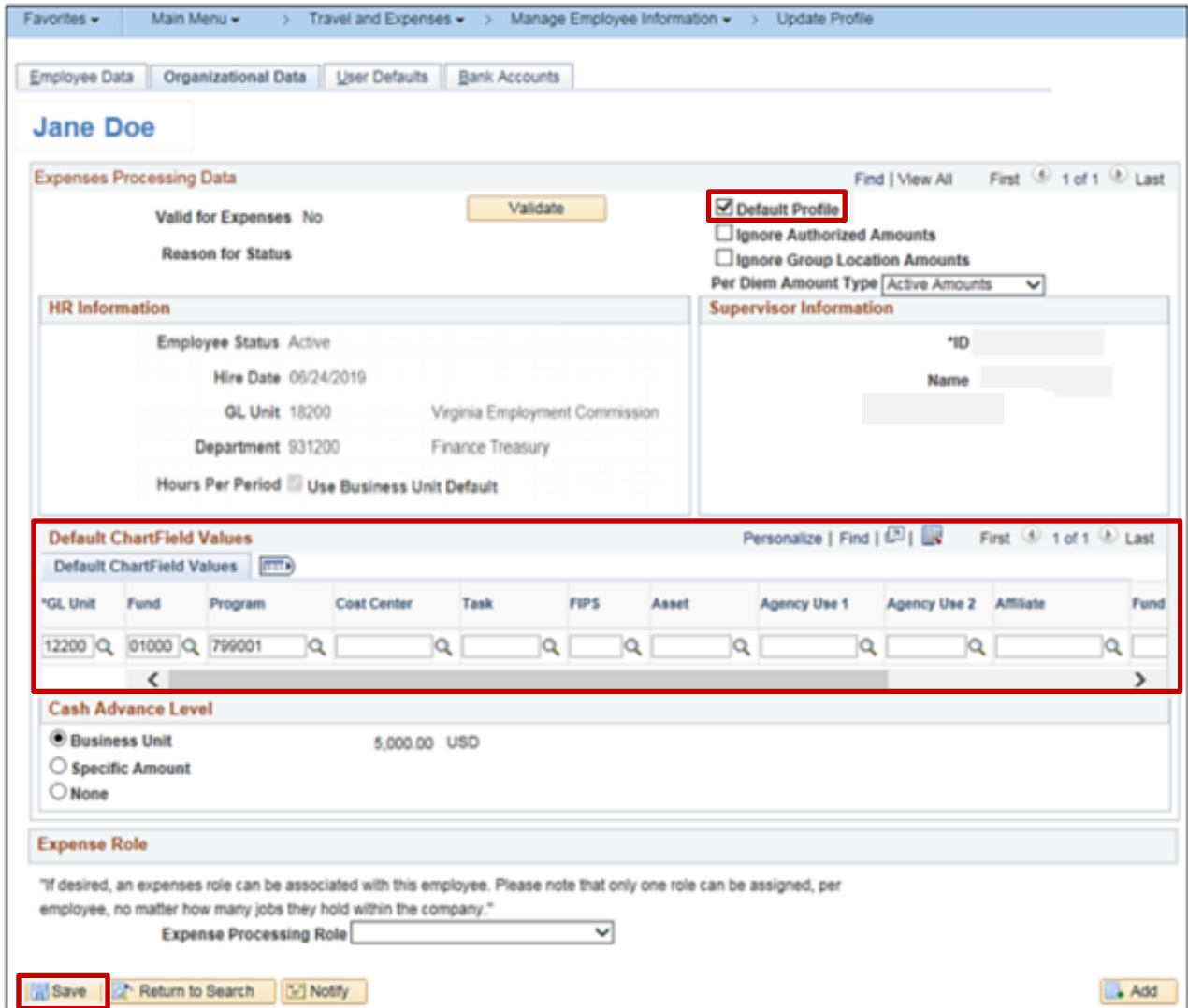
The Employee Profile page displays.



The screenshot shows the 'Update Profile' page for Jane Doe. The breadcrumb trail is: Favorites > Main Menu > Travel and Expenses > Manage Employee Information > Update Profile. The 'Organizational Data' tab is highlighted with a red box. The page is divided into three main sections: Employee Information, Home Address, and Mailing Address. The Employee Information section includes fields for Last Name (Beaver), First Name (Bob), Telephone, and Personnel Status (Employee). It also has radio buttons for Employee Base (Office is selected) and Payments Sent To (Home Address is selected). The Home Address section includes fields for Country (USA), Address 1 (123 Mockingbird Lane), Address 2, eVA VLIN, eVA Address ID, City (Richmond), County, State (VA), and Postal (23219). The Mailing Address section includes similar fields for Country, Address 1, Address 2, eVA VLIN, eVA Address ID, City, County, State, and Postal. At the bottom, there are buttons for Save, Return to Search, Notify, and Add. A navigation bar at the very bottom contains links for Employee Data, Organizational Data, User Defaults, and Bank Accounts.

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

The **Organizational Data** tab displays.



Jane Doe

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

Valid for Expenses No Validate **Default Profile**

Reason for Status Ignore Authorized Amounts

Ignore Group Location Amounts

Per Diem Amount Type Active Amounts

HR Information **Supervisor Information**

Employee Status Active *ID

Hire Date 06/24/2019 Name

GL Unit 18200 Virginia Employment Commission

Department 931200 Finance Treasury

Hours Per Period Use Business Unit Default

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

Default ChartField Values TTTT

*GL Unit	Fund	Program	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	Affiliate	Fund
12200	01000	799001								

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

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 Administrator 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 Administrator 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

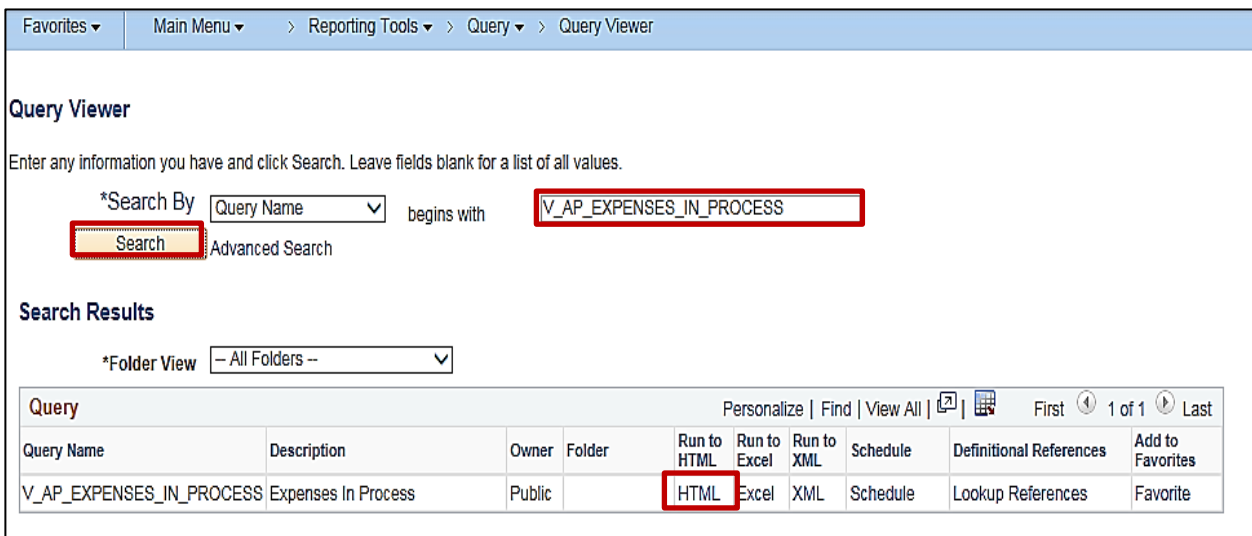
When an employee no longer works for your agency, there are some necessary steps to take before the Employee Profile Status is changed to **Terminated**. You will need to verify all Expense transactions have been either paid or deleted, and there are no items in the queue for the employee to approve.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



The screenshot shows the Query Viewer interface. At the top, there is a breadcrumb trail: Favorites > Main Menu > Reporting Tools > Query > Query Viewer. Below this, the page title is "Query Viewer". A search instruction reads: "Enter any information you have and click Search. Leave fields blank for a list of all values." The search criteria are: "*Search By" set to "Query Name", "begins with" set to "V_AP_EXPENSES_IN_PROCESS", and a "Search" button. Below the search section, there is a "Search Results" section with a "*Folder View" dropdown set to "-- All Folders --". A table displays the search results:

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_AP_EXPENSES_IN_PROCESS	Expenses In Process	Public		HTML	Excel	XML	Schedule	Lookup References	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.

The **Expenses in Process** query displays.

V_AP_EXPENSES_IN_PROCESS - Expenses In Process

Business Unit (% for all)

Dept ID (% for all) %

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	0098762016	Ranger, Pete	Class Fee	250.00	250.00		11/17/2016	11/17/2016	FINUSER01				
2 Advance	15100	95400			0000000873	Staged	0098762016	Ranger, Pete	Business Writing Class Fee	250.00	250.00		11/17/2016	11/17/2016	FINUSER01				
3 Advance	15100	95400			0000000874	Staged	0098762016	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	0098762016	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	0098762016	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	0098762016	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	0098762016	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**.