
Correction: Cardinal HCM Deployment - Upcoming Employee Profile Changes

1 message

DOA - Cardinal Project <projectcardinal@doa.virginia.gov>

Wed, Feb 23, 2022 at 5:15 PM

Good Afternoon,

The email below was sent on February 18, 2022 regarding the upcoming expense employee profile changes. An error was found in the attached pdf regarding the date at which Expense Transactions (i.e., reports, cash advances) need to be completed.

Correction: Cardinal will require that any pending Expense Transactions (i.e., reports, cash advances) be in deleted or approved status in the system as of 5:00 p.m. Wednesday, March 23, 2022, by agencies in preparation for HCM deployment.

This correction has been updated in the document attached to this email. We apologize for any inconvenience this may have caused you. Thank you for your continued support.

Regards,

The Cardinal HCM Project Team

On Fri, Feb 18, 2022 at 11:12 AM DOA - Cardinal Project <projectcardinal@doa.virginia.gov> wrote:

This email is being sent to Release 2 agencies using the Expenses module in Cardinal Financials.



With the implementation of Cardinal Human Capital Management (HCM), Expense Employee Profiles will be synced from HCM to Cardinal Financials (FIN) and no new additions/updates will occur in FIN after HCM is fully implemented.

This communication is to provide additional information on the changes that are occurring. Please review the attached PDF document which outlines the impacts. Agencies should notify impacted employees of the changes, as applicable.

If you have questions related to any of this information, please contact the Cardinal Post Production Support Accounts Payable team at cardinalppsap@doa.virginia.gov.

Regards,

The Cardinal HCM Project Team



Cardinal HCM Deployment

Expense Employee Profile Processing Changes

With the implementation of Cardinal Human Capital Management (HCM), Expense Employee Profiles will be synced from HCM to Cardinal Financials (FIN) and no new additions/updates will occur in FIN after HCM is fully implemented. The processing changes are outlined below.

In Cardinal HCM, each employee will only have one Cardinal Employee ID. Cardinal Employee IDs are established based on PMIS IDs in the following format: 00 + 7-digit PMIS ID + 00. Employee Profiles are established in FIN using the Cardinal Employee ID.

Release 2 (R2) Employee Profiles associated with Employee IDs that do not match the standard format (e.g., do not end in 00) will be inactivated. This includes the Profiles created with the 60-69 suffixes. New Employee Profiles will be created using the standard Cardinal Employee ID and the data converted into Cardinal HCM. Proxy data associated with the “old” Employee Profile will automatically be transferred to the “new” Employee Profile. Cardinal encourages agencies to review this data and correct any issues in Cardinal after the R2 go-live.

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). At the time of R1 go-live, Employee Record Numbers for existing R2 agency Employee Profiles were updated to “99”. This prevented data syncing issues during the period between R1 and R2. At the time of R2 go-live these “99” records will be inactivated for employees in R2 agencies. Examples are depicted in the table below.

Employee	PMIS ID	Cardinal Employee ID	Job	Cardinal Employee Record Number
Cardinal Carl	1234567	00123456700	R1 Agy Job	0
			R2 Agy Job	1
			R2 Agy Job	99 (inactive)
Susie Que	6543210	00654321000	R1 Agy Job	0
			R1 Agy Job	1
			R3 Agy Job	99 (active)
Billy Bird	0657149	00065714900	R2 Agy Job	0
			R2 Agy Job	99 (inactive)

As new Employee Profiles may be established for the employee and/or associated Employee Record Numbers may change, Cardinal will require that any pending Expense Transactions (i.e., reports, cash advances) be in deleted or approved status in the system **as of 5:00 p.m. Wednesday, March 23, 2022**, by agencies in preparation for HCM deployment.

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 “Default” check box is highlighted in the screenshot below.



Cardinal HCM Deployment

Expense Employee Profile Processing Changes

The screenshot provided below highlights the key changes of the “Organizational Data” tab for the Employee Profile page after go-live:

- Multiple Employee Records
- Default Profile flag (can be updated to the record of expense transaction)
- HR and Supervisor information are grayed out and cannot be modified
- Default ChartField Values can be updated as needed

The screenshot shows the 'Update Profile' page for an employee. The 'Organizational Data' tab is selected. The 'Expenses Processing Data' section includes a 'Default Profile' checkbox which is checked. The 'HR Information' and 'Supervisor Information' sections are grayed out. The 'Default ChartField Values' section is also highlighted.

GL Unit	Fund	Program	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	Affiliate
18200	07010		01800000						

Cardinal course materials (AP315A Online Expense Processing, AP315B Interface Expense Processing, and AP316 Employee Expenses Administration) will be updated with new Employee Profile and Expenses processing changes.



After HCM go-live in April 2022, R2 agencies **will not** have add/update access to the Employee Profile page other than changing the “Default” flag for employees with multiple records so that the expenses can be submitted by the related agency. Agencies will continue to have access to add/update the “Default ChartField Values” section on the Employee Profile Organizational Data page as well as information on the “User Defaults” page.

Please note that Cardinal FIN is scheduled to be accessible a few days before Cardinal HCM go-live. During this interim period, name and address changes on the FIN Employee Profile cannot be made. Updates to name and address should be entered in Cardinal HCM by the HR Administrator when it is released, and the updates will sync to Cardinal FIN.

Banking data for R2 agency employees **will no longer come from the** Employee Bank CIPPS upload (AP947) and all the bank information will be synced from HCM. R2 agencies **will not** be able to add/update any Employee Profiles through the Employee Profile upload (AP1048). Agencies that currently use this upload to add/update proxies **will not** be able to do so after HCM go-live. Going forward, agencies will be using online pages as listed below for proxy maintenance.

Navigations to maintain proxies for an employee after HCM go-live:

- Proxies for a single employee (Main Menu > Travel and Expenses > Manage Expenses Security > Authorize Expense Users)
- Mass add/delete proxies for an entire agency (Main Menu > Travel and Expenses > Manage Expenses Security > Mass Updt Authorized Exp Users)

Note: Access to these pages is based on roles and users should already have the appropriate roles assigned to them.