

## **Adding New Employees to FI\$Cal 1.0 Supplemental Job Aid**

**Date:** 10/9/2014

**Target Audience:** Department Labor Distribution Maintainer

**Purpose:** This Supplemental Job Aid provides instructions for adding new employees to FI\$Cal so they can be configured by a Business Unit.

### **Adding New Employees to FI\$Cal:**

Before an employee can be configured by a Business Unit, their Social Security Number (SSN) must be added to the statewide Employee Table. When this has been completed, they are assigned an Employee ID. The Employee ID is a permanent, unique, and non-confidential identification number. The Employee ID does not change if an employee transfers between FI\$Cal departments or returns to employment with a FI\$Cal department after an extended leave. All State employees have an Employee ID, whether or not they work for a FI\$Cal department.

After an employee has been added and assigned an Employee ID, the Department Labor Distribution Maintainer can then configure the employee on the Employee Option page. Departments that are using Labor Distribution must configure all of their employees that receive payments.

After the Employee Options have been configured for the Department, other modules in FI\$Cal may also use the Employee ID for recording non-labor transactions (e.g., salary advances) at the employee level.

There are three ways new employees are added to the Employee Table. The first two are through automated interfaces. The third is through manual entry. These are:

1. INFG105 Employee Data Interface (monthly) – This interface from the State Controller's Office (SCO) includes all current State employees. New employees are added to the Employee Table by this interface, and the names of existing employees are updated as needed.
2. INFG089 Payroll Interface (monthly) – This interface from SCO loads payroll payment data for Labor Distribution. If the SSN in a payroll record is not found in the Employee Table, the employee is added and an Employee ID is assigned.
3. Direct data entry – This manual entry option uses the Employee page. Access to this page is restricted to a limited number of Fiscal Service Center (FSC) staff.

A department may need an employee to be added to the Employee Table and assigned an Employee ID manually, before the employee has been added by either of the monthly interfaces. For example, the Accounting Office may need to issue the employee an Office Revolving Fund salary advance by entering a voucher. To issue the salary advance, the employee must have an Employee ID and must be configured in Labor Distribution for the Business Unit. The employee is then included in the prompt list for the Open Item Key on the Voucher Distribution Line.

**Before opening a Service Ticket with FSC, determine whether or not a new employee already has an Employee ID.** To do this, navigate to the Employee Options page and use the employee prompt on the Add a New Value tab as described in Steps 3 and 4 below.

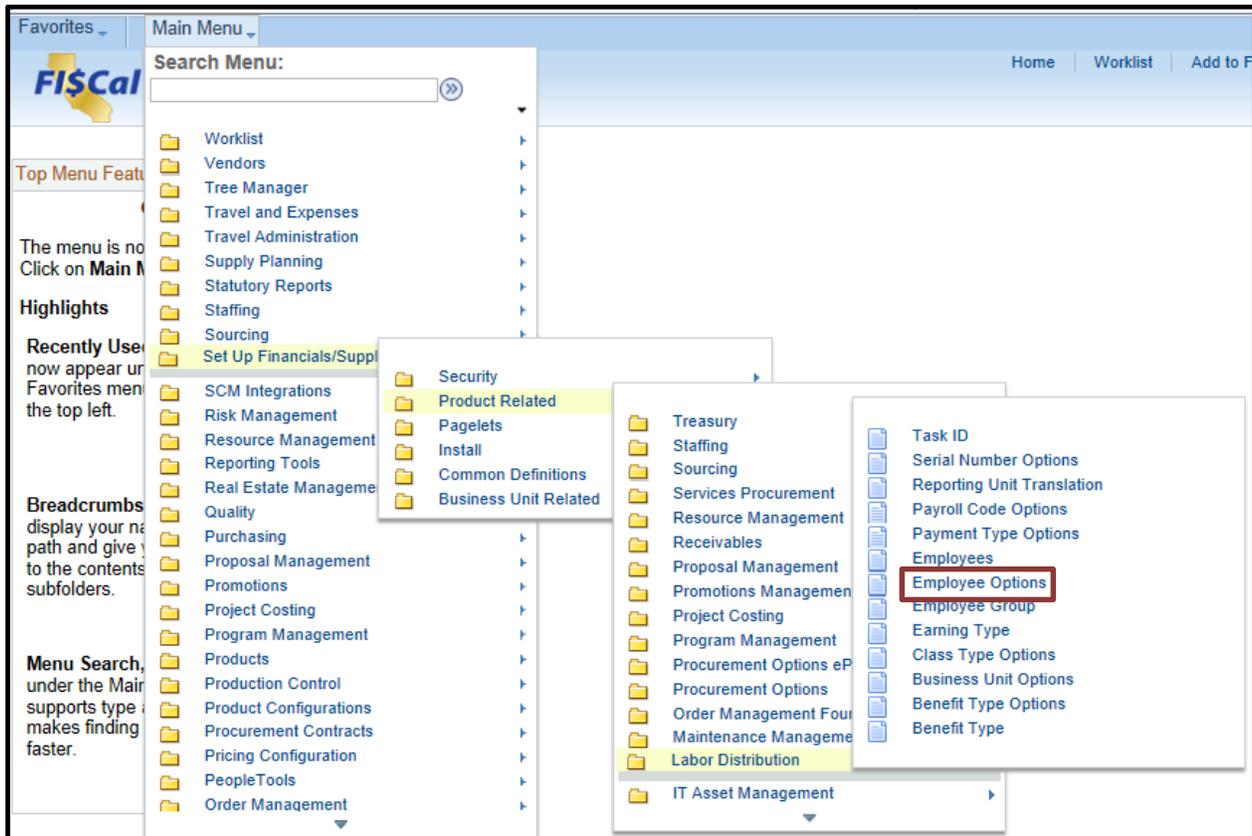
After verifying that an employee does **not** have an Employee ID, follow the steps below to have FSC add the employee manually. When that has been completed, configure the employee on the **Employee Options** page as described in training course LD102.

**Step 1:** Open a Service Ticket with FSC requesting that they add the employee to the FI\$Cal Employee table.

**Step 2:** An FSC representative will call you back to obtain employee information verbally. (**Note:** Do not send an email to FSC with confidential employee information.) Provide the SSN, first name, middle initial, and last name. To add the employee, the FSC representative enters this information into the FI\$Cal Employee table and provides the assigned Employee ID.

**Step 3:** Add the employee to your Business Unit on the Employee Options page.

Navigate to the **Employee Options** page: Main Menu → Set Up Financials/Supply Chain → Product Related → Labor Distribution → Employee Options.



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

Favorites ▾ Main Menu ▾ > Set Up Financials/Supply Chain ▾ > Product Related ▾ > Labor Distribution ▾ > Employee Options Home

---

**FI\$Cal**

### Employee Options

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**

▼ Search Criteria

SetID: = ▾ STATE 🔍

Employee ID: begins with ▾ 🔍

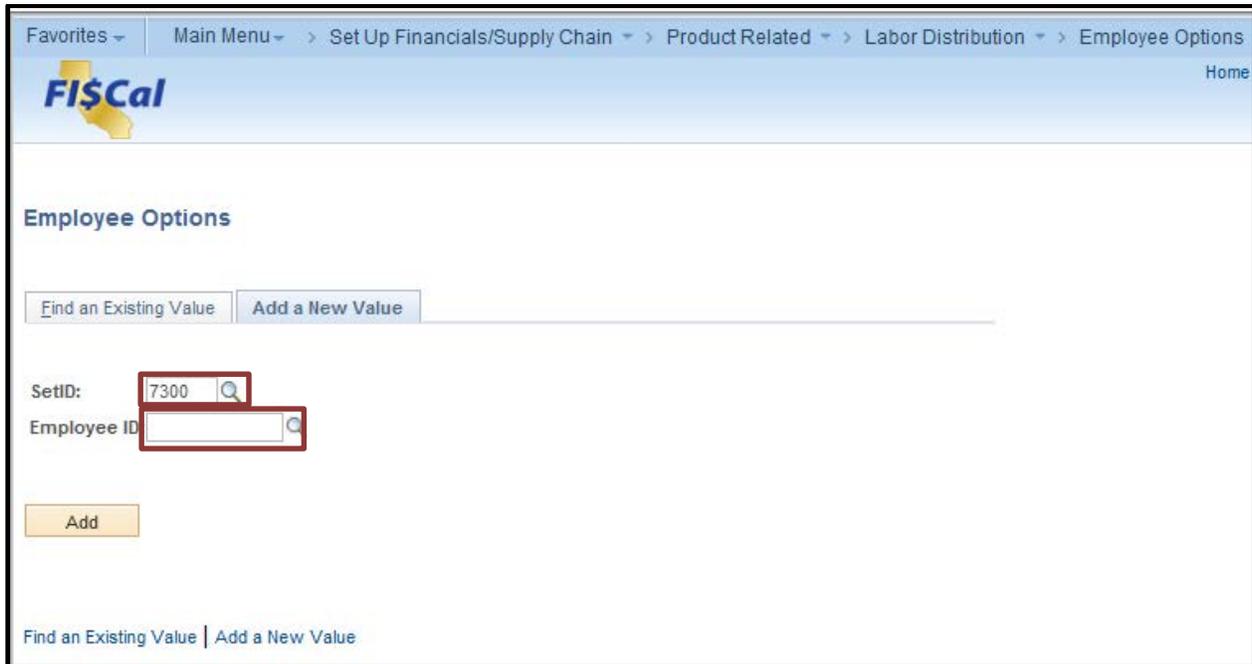
Last Name: begins with ▾

First Name: begins with ▾

Include History  Correct History  Case Sensitive

Search Clear Basic Search  Save Search Criteria

**Step 4:** Enter or select the **SetID** (Business Unit) field. Either enter the **Employee ID** number, or search using the **Employee ID** look up button. This example explains how to use the Employee ID look up button.



The screenshot shows the 'Employee Options' page in the FI\$Cal system. The breadcrumb trail at the top reads: Favorites > Main Menu > Set Up Financials/Supply Chain > Product Related > Labor Distribution > Employee Options. The page title is 'Employee Options' and there is a 'Home' link in the top right. Below the title, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'SetID:' field contains the value '7300' and has a search icon. The 'Employee ID' field is empty and also has a search icon. Below these fields is an 'Add' button. At the bottom of the form, there are links for 'Find an Existing Value' and 'Add a New Value'.

The **Look Up Employee ID** lists all employees configured in the Employee table, regardless of Business Unit. To narrow the search, enter one or more of the search criteria fields and click Look Up. (Note: Last 4 Digits of SSN and Last Name are redacted below.)

Favorites - Main Menu - > Set Up Financials/Supply Chain - > Product Related - > Labor Distribution - > Employee

**FI\$Cal**

**Employee Options**

Find an Existing Value Add a New Value

SetID: 7300

Employee ID:

Add

Find an Existing Value | Add a New Value

**Look Up Employee ID** Help

Employee ID: begins with

Last 4 Digits SSN: begins with

Last Name: begins with

First Name: begins with

Look Up Clear Cancel Basic Lookup

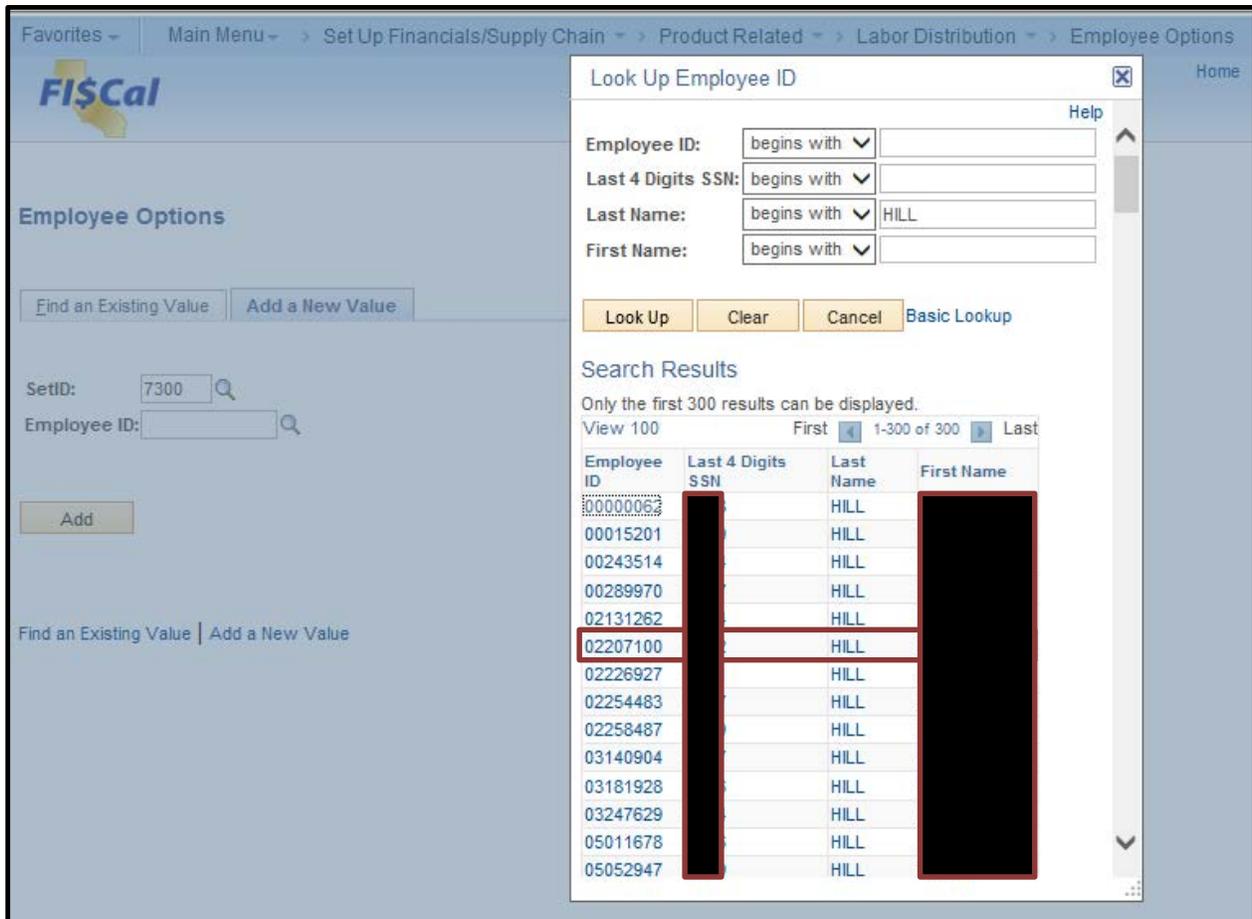
**Search Results**

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Employee ID	Last 4 Digits SSN	Last Name	First Name
00000038			REGINALD
00000062			VERONICA
00000169			HUAN
00000180			RENATO
00000186			ISAAC
00000208			TESSA
00000269			FARID
00000289			TARA
00000345			HENDRA
00000442			SAMANTHA
00000520			GERALD
00000670			ROBERT
00000748			ANNAMARIE
00000778			LAURIE

Employees matching the search criteria are then shown. After the employee has been located, click on any field in the prompt list to open the Employee Options page. (Note: Last 4 Digits of SSN and First Name are redacted below.)



Look Up Employee ID

Employee ID: begins with

Last 4 Digits SSN: begins with

Last Name: begins with

First Name: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Employee ID	Last 4 Digits SSN	Last Name	First Name
00000063		HILL	
00015201		HILL	
00243514		HILL	
00289970		HILL	
02131262		HILL	
02207100		HILL	
02226927		HILL	
02254483		HILL	
02258487		HILL	
03140904		HILL	
03181928		HILL	
03247629		HILL	
05011678		HILL	
05052947		HILL	

Refer to the instructions that are provided in the training class LD102 to configure the employee.

You have successfully added a new employee to FI\$Cal so they can be configured by a Business Unit.