



2.5 How to...Review Payroll – Step 5 Add New Employee

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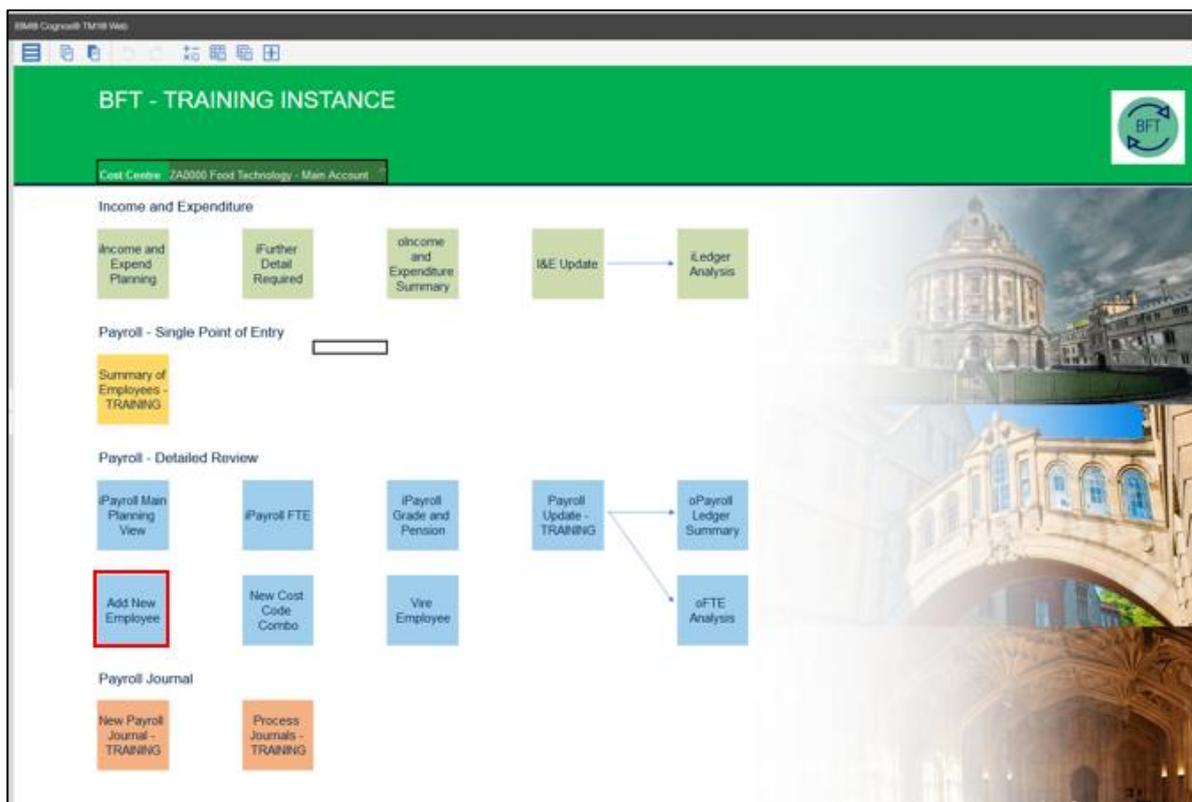
1. When to use Add New Employee

“... add a new employee or provision to BFT Payroll... for a:

- **New Person...**mainly, to add a new starter. (This functionality is also used balancing A2 and B Ledger FTEs - see Payroll Review Training Step 7).
- **New Provision..**to ADD/amend a lump sum or recurring value. There's no FTE or Grade with Provisions

2. Completing the form

Launch Add New Employee from the BFT Landing Page



“...you can add up to 10 new employees/provisions for the specific cost centre in the header. Note this has to be a posting/child/leaf cost centre...”

... if you open to a parent cost centre, you'll get an error message in red in the header.”

a. New Employee: Standard and non-Standard Grade/Stage

“For Person, leave “Element” and “Amount £” blank. Complete other fields (new data appears green before saving)...then press F9 to Save. **Make sure you complete the “Person or Provision” field!**”

On clicking F9 or selecting Actions/Save data changes:

- Data entered goes black, indicating it is saved to the central model.
- Standard Grade: system will show “Salary” in Element field and Monthly Gross Pay in Amount £ field

- **Non-Std Grade: complete "Amount £" with monthly Gross Pay value**

Version	Q1 Forecast	Year	2018-19	ADD EMPLOYEES									
Index	Start Period	Employee Name	Person or Provision	Job Title	Element	Grade and Stage	Amount £	FTE	Natural Account	SoF	Staff Classification	Pension Scheme	College Affiliation
1	Dec	I am Mr Sam I am	Person	Professor of Cid Salary	A20	9999	-	1.0	50100	Academi 00000	AC - Academic (USS		Brasenose
2													
3													

...£ figure will show green, then press F9/Save data changes again

Version	Q1 Forecast	Year	2018-19	ADD EMPLOYEES									
Index	Start Period	Employee Name	Person or Provision	Job Title	Element	Grade and Stage	Amount £	FTE	Natural Account	SoF	Staff Classification	Pension Scheme	College Affiliation
1	Dec	I am Mr Sam I am	Person	Professor of Cid Salary	A20	9999	6000	1.0	50100	Academi 00000	AC - Academic (USS		Brasenose
2													

b. New Provision

To add a Provision:

- Complete Period, Name, select "Provision" and add the type (Recurrent or non-Recurrent) in the Element dropdown. **Make sure you complete the "Person or Provision" field!**

Index	Start Period	Employee Name	Person or Provision	Job Title	Element	Grade and Stage	Amount £	FTE	Natural Account	SoF	Staff Classification	Pension Scheme	College Affiliation
1	Jan	Cutlet Secretariat	Provision	Nut Division	1								
2													
3													
4													
5													
6													
7													

- Leave "Grade and Stage", "Amount" and "FTE" blank, but complete "Natural Account" and "SoF". Note "College Affiliation" must be completed as well...(put "None"!)
 - Click F9 or select Actions/Save data changes...

The "Amount £" field is now available...enter the provision amount:

Version	Q1 Forecast	Year	2018-19	ADD EMPLOYEES									
Index	Start Period	Employee Name	Person or Provision	Job Title	Element	Grade and Stage	Amount £	FTE	Natural Account	SoF	Staff Classification	Pension Scheme	College Affiliation
1	Jan	Cutlet Secretariat I	Provision		Provision R		1500		50300	Technicia 00000			None
2													

3. Running the process

Once you have made your entries, click the blue "Add Employees" button at the top of the page

Version	Q1 Forecast	Year	2018-19	ADD EMPLOYEES									
Index	Start Period	Employee Name	Person or Provision	Job Title	Element	Grade and Stage	Amount £	FTE	Natural Account	SoF	Staff Classification	Pension Scheme	College Affiliation
1	Jan	Cutlet Secretariat I	Provision		Provision R		1500		50300	Technicia 00000			None
2													

...click Continue

Are you sure you wish to add these Employees?

natural
:coun
Tech

...click OK

Process Completed Successfully

atl
:cc

4. Checking the results

Open the Summary of Employees for the cost centre and review entries under the “New Employees” heading

Employee List	Job Title	Grade/ Stage	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Year Total
- All Employees			95,664	95,664	95,963	127,445	153,954	212,278	184,436	187,541	212,518	216,739	202,691	206,817	1,991,711
+ Existing Employees			95,664	95,664	95,963	95,471	95,382	101,927	104,500	108,205	112,847	117,068	103,020	107,146	1,232,859
- New Employees			-	-	-	31,973	58,572	110,351	79,935	79,335	99,671	99,671	99,671	99,671	758,852
+ NewPerson I am Mr Sam I am X0001	Professor of Cider mashing	A20.9999	-	-	-	-	7,745	7,745	7,745	7,745	7,823	7,823	7,823	7,823	62,271
+ NewProvision Culfet Secretariat I Z0			-	-	-	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	13,500
+ NewProvision Culfet Secretariat II Z0			-	-	-	-	-	-	600	-	-	-	-	-	600

5. Troubleshooting

Problem	How to fix...
Parent cost centre selected (red error message)	Select Child (posting) cost centre in page header
Entries drop out after clicking F9	Re-select entries from dropdown menus
“Errors exist...” message after clicking Add Employees button 	<ul style="list-style-type: none"> • Check that start Period is a Plan (not Actual) month • Check that data has been entered to all required fields
Success message seen, but my entries “stick” in the screen	<ul style="list-style-type: none"> • Check if Name and Amount £ fields are blank. Complete as needed then re-run process.
Success message seen, but no new entries on checking the SoE (note: the “Success” message just tells us that a record has been created...but if it has no values, it will not be visible on BFT)	<p>“Person or Provision” field left blank</p> <ul style="list-style-type: none"> • Check Payroll Main Planning View cubeview for the cost centre, unsuppress zeros on rows...to check for entries with no values – these will not show in SoE <p>Recommended course of action is to repeat the entries, making sure Person or Provision is correctly selected!</p>