



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

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- 2. Completing the form
 - New Employee: Standard and non-Standard Grade/Stage
 - New Provision
- 3. Running the process
- 4. Checking the results
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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



"...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...

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Main Menu	Add New	Employee x											
A A	dd New E	mployee ZB0000 Food Technology - M	ain Account	2	> Summary	∕ of Employe	es - TRAININ	> Individua	I Employee Recor	d Card - TRAIN	IIN> iPayroll Main P	lanning View	
Version	Q1 Forecast		• Year	2018-19	<u>.</u>						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 2							-	-					
} -							-	-					
							-	-					
							-	-					
							-	-					
*							-						

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

sin Menu	Add New Employee x	
Ad	d New Employee	
	Cost Centre ZB Food Technology -Train 2	Summary of Employees

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!

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ployee × ployee 00000 Food Technology - Mai	n Account ♥ Year	2018-19	> Summary o	f Employees - TF	AININ> Individu	ual Employee R	lecord Card - TRAI	NIN> iPayroll Main Pl	anning View	
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-	Year	2018-19	·					4001		
								~~~~	EMPLOYEES	
ployee Name	Person or Provision	Job Title	Element G	rade and Amo Stage	unt£ FTE	Natural Account	SoF t	Staff Classification	Pension Scheme	College Affiliation
mSam replacing Post AB1234	Person	Baker's Man	05	5S.4	1.0	50200 Supp	port \$00000	DO - Other Adm C	OSPS	None
							Р	erson		
							Leave E	lement and		
							Amount	£ fields blan	k	
					-		• F9 or A	ctions/Save		
ear are updated to avoid errors							data cł	nanges to		
rror the screen will be reset, an	d all data will be	removed from th	he table				save/v	alidate		
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Person     Baker's Man     055.4     1.0     60200     Support (00000       -     -     -     -     -     P       -     -     -     -     -       -     -     -     -     P       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -     -       -     -     -     -       -	Ployee Name     Person or Provision     Job Title     Element     Grade and Stage     Amount £     FTE     Natural Account     SoF     Staff Classification       nSam replacing Post AB1234 (Person     Baker's Man     055.4     1.0     50200     Support 100000     D0 - Other Adm (D)       nSam replacing Post AB1234 (Person     Baker's Man     055.4     1.0     50200     Support 100000     D0 - Other Adm (D)       -     -     -     -     -     -     -     -       -     -     -     -     -     -     -     -       -     -     -     -     -     -     -     -       -     -     -     -     -     -     -     -       -     -     -     -     -     -     -     -       -     -     -     -     -     -     -     -       -     -     -     -     -     -     -     -       -     -     -     -     -     -     -     -       -     -     -     -     -     -     -     -       -     -     -     -     -     -     -     -       -	Ployee Name     Person or Provision     Job Title     Element     Grade and Stage     Amount £     FTE     Natural Account     SoF     Staff     Pension       nSam replacing Post AB1234 Person     Baker's Man     055.4     -     1.0     60200     Support 100000     DO - Other Adm OSPS       -     -     -     -     -     -     Person       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -     -     -       -     -     -     -

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

Version	Q1 Forecast	•	Year	2018-19	<u>.</u>						ADD	D 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	Nov	SamSam replacing Post AB1234!	Person	Baker's Man	Salary	05S.4	2319	1.0	50200 Support S	00000	DO - Other Adm	OSPS	None
2							-	-					
3							-	-					

lersion	Q1 Forecast		• Year	2018-19	1			ADD E	EMPLOYEES
ndex	Start Period	Employee Name	Person or Provision	Job Title	Element Grade and Amount£	FTE	Natural SoF Account	Staff Classification	Pension College Scheme Affiliatio
1 2 3	Dec	I am Mr Sam I am	Person	Professor of Cid	(Salary A20.9999	1.0 - -	50100 Academi 00000	AC - Academic (U	SS Brasenose
						_			
£ figı	ure will s	how green,	then press	s F9/Sav	e data changes d	agai	'n		
£ figu /ersion	Q1 Forecast	how green,	then press	5 F9/Sav	e data changes d	ngai	'n	ADD EM	IPLOYEES
. <i>£ figu</i> ^{Version}	LITE WILLS Q1 Forecast Start Period	<i>how green,</i>	Then press Year Person or Provision	5 F9/Sav 2018-19 • Job Title	e data changes d Element Grade and Amount£ Stage	agai	Natural SoF Account	ADD EM Staff Classification	IPLOYEES Pension College Scheme Affiliation

#### 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 a
1	Jan	Cutlet Secretariat	Provision	Nut Division	1 5 4
2					Contract of the second
3					
4					Deside a Deserved
5					Provision Recurrent
6					Provision NR
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 2	Jan	Cutlet Secretariat I		Provision		Provision R		1500 -	•	50300 Technicia	00000			None

#### 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	<ul> <li>Year</li> </ul>	2018-19	•					ADD	EMPLOYEES	
ndex	Start Period Employee Name	Person or Provision	Job Title	Element Grade an Stage	d Amount£	FTE	Natural Account	SoF	Staff Classification	Pension Scheme	College Affiliation
click	Continue	Provision		Provinion P	1500	_	50300 Technicic	00000			None
Ar	re you sure you wish to add these Emplo	yees?	x	atural scoun Tech							
click	ОК										
Proc	cess Completed Succesfully		ок								

# 4. Checking the results

*Open the Summary of Employees for the cost centre and review entries under the "New Employees" heading* 

Main Menu Add Nev	v Employee × 🛄 Summary of	f Employees - TRAINING ×	ry of Empl	oyees - `	TRAININ	G ×									
Summary of	of Employees - TR	AINING													
Cost C	entre ZB0000 Food Technol	ogy - Main Account 👻													
Versio	n Q1 Forecast	<ul> <li>Financial Y</li> </ul>													
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	1,991,71
+ 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	1,232,85
<ul> <li>New Employees</li> </ul>			-	-	-	31,973	58,572	110,351	79,935	79,335	99,671	99,671	99,671	99,671	758,85
+ NewPerson I am Mr Sam I an	n X0001 Professor of Cider mashing	A20.9999	-		-	-	7,745	7,745	7,745	7,745	7,823	7,823	7,823	7,823	62,27
+ NewProvision Cutlet Secretar	iat I Z00		-		-	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	13,50
+ NewProvision Cutlet Secretariat 200 1,500 1,500 1,500 1,500 1,500 1,500 1,500 1,500 1,500 1,500 13,500															

# 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> <li>Check that start Period is a Plan (not Actual) month</li> <li>Check that data has been entered to all required fields</li> </ul>
Success message seen, but my entries "stick" in the screen	<ul> <li>Check if Name and Amount £ fields are blank. Complete as needed then re-run process.</li> </ul>
Success message seen, but no new entries on checking the SoE (note: the "Success" message just tells us that a record has been createdbut if it has no values, it will not be visible on BFT)	<ul> <li><i>"Person or Provision" field left blank</i></li> <li>Check Payroll Main Planning View cubeview for the cost centre, unsuppress zeros on rowsto check for entries with no values – these will not show in SoE</li> <li>Recommended course of action is to repeat the entries, making sure Person or Provision is correctly selected!</li> </ul>