



2.2 How to use BFT Payroll: Employee Record Card

Prerequisite: Make sure you are familiar with: **2.1 How to use BFT Payroll: Employee Summary** before working through this training

Launch the Employee Record Card from Summary of Employees (SoE)

- In the Summary of Employees, place the cursor in the Job Title column, next to the Employee name
- Click the blue More Details button

1. Cursor in Job Title column, next to Name (Don't use expanded view for this)

2. Click "More Details" button to launch ERC

Hint

To be certain of accessing the full record card for an individual **ALWAYS** set the Cost Centre in the Summary of Employees at the highest level

• ERC opens for selected employee:

The screenshot shows the 'Individual Employee Record Card - TRAINING' for employee BONEBRAKER F 8201037. The interface includes a navigation bar at the top, a header with the employee's name and cost centre, and several data tables. The 'Employee Summary' table shows FTE values for each month. The 'Grade and Stage' table shows salary and additional salary components. The 'Pension' table shows pension contributions. The 'Payroll Cost' table shows various cost codes and their amounts. A callout box points to the data entry area, indicating that text turns green on first input and black after committing with F9.

In the ERC you can:

1. Review Employee payroll details
2. Add new cost code combinations
3. Add/Amend Grade & Stage or Pension scheme
4. Select a specific Cost Code Combination (CCC) and
5. Add/amend FTEs for the CCC
- 7, 8, 9 Add/amend Other Costs for the CCC

When entering data:

- Text may go **green** when first input
- Click F9 to commit entries...text will go **black** once committed

The next sections show how to add and amend data in the ERC

1. Review Employee payroll details

Employee Details from Core HR

Version	Q1 Forecast		Financial Years 2018-19	
Name	BONEBRAKE E	FTE Budget	0.0	
Job title	Personal Assistant / Farm Finance Office	FTE Actual	1.0	
College	DEFAULT/NOT APPLICABLE	FTE Plan	1.1	
Costing Dept	ZF	Salary	32,207	
Staff Classific.	DS	Payroll Cost	40,943	
SoF		Post No.		

The employee summary shows the FTE split and cost across different cost centres. Note the codes on the left hand side

Employee Summary		Aug	Sep	Oct	Nov	
BONEBRAKE E 8601037		FTE Plan	1.00	1.00	1.00	1.00
		Costs	2,982	2,982	2,982	3,413
8601037-ZF0001-50200-A2007		FTE Plan	0.50	0.50	0.50	0.40
		Costs	1,491	1,491	1,491	1,523
8601037-ZF9999-50200-00000		FTE Plan	0.50	0.50	0.50	0.60
		Costs	1,491	1,491	1,491	1,890
8601037-Z99982-50110-A0231		FTE Plan	-	-	-	-
		Costs	-	-	-	-
8601037-Z90000-50200-A2007		FTE Plan	-	-	-	-
		Costs	-	-	-	-

2. Add new cost code combinations

Here you can add new Cost Code Combinations

Employee BONEBRAKE E 8601037

Split	Dest Cost Centre	Account	SoF
New Combo 1	ZA0000	50210	A2001
New Combo 2			
New Combo 3			

- Select Cost Centre, Account and SoF from drop-down menus
- Click "Add combinations" blue button to run process
- Don't leave the top row(s) blank (or you'll get a process error)
- You can use the new cost code combo immediately (see step 4)

3. Add/Amend Grade & Stage or Pension scheme

Grade and Stage

Adj	Salary					
Plan	Salary					
Adj	Additional Salary					055.7
Plan	Additional Salary	055.6	055.6	055.6	055.6	055.7

Pension

Adj	Salary					
Plan	Salary	05P0	05P0	05P0	05P0	05P0

Hint

- Beware **Salary vs Additional Salary!** FTE and Grade/Stage must both be against the same heading, or costs won't calculate!

4. Select a specific Cost Code Combination (CCC) for review/amendment of FTEs & Other payroll costs

Select Split ID

FTE	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total Year
Adj Salary									
Plan Salary									
Adj Additional Salary									
Plan Additional Salary									

5. Add/amend FTEs for a Cost Code Combo

Individual Employee Record Card - TRAINING

FTE	Aug	Sep	Oct	Nov
Adj Salary	0.00	0.00	0.00	0.00
Plan Salary	0.00	0.00	0.00	0.00
Adj Additional Salary	0.00	0.00	0.00	0.00
Plan Additional Salary	0.00	0.00	0.00	0.00

Hint (again!)

- Beware **Salary vs Additional Salary!** FTE and Grade/Stage must both be on one or the other, or costs won't calculate!

6. Add/amend Other Costs for a Cost Code Combo

Other

Profile	Aug	Sep	Oct
Other Rec. Pension			
Other Rec. Non-Pension			
Other Non Rec. Pension			
Other Non Rec. Non-Pension			
Prof Distinction			
Provision Rec.			
Provision Non Rec.			
Payroll Journal			

Free text entry to yellow cells

If "Profile" column is yellow, select "Manual" from dropdown to unlock cells

"Other" staff costs - used for allowances, professional merit awards etc