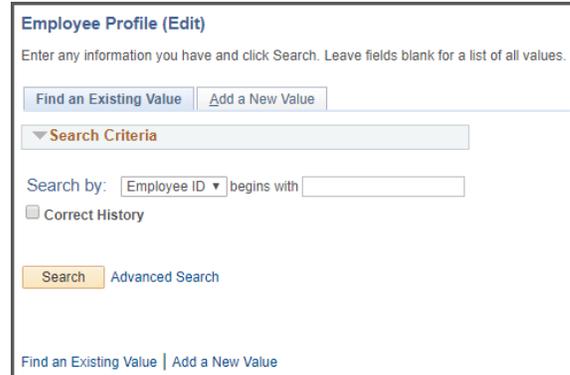


Maintain Employee Profile

The Employee Profile page stores default values and settings that the system uses to streamline the expense report entry. When a Travel Authorization or Expense Report is processed for an employee, the system will apply the default Cost Center or Project information listed on the Employee Profile page. This information can be updated if necessary. With the appropriate security, a representative from the department can manage an employee's profile information from the Travel and Expenses menu or by using the User Defaults link located on various expense pages in UTShare.

1. To access the Employee Profile begin by navigating to: **NavBar > Menu > Financials > Travel and Expenses > Manage Employee Information > Update Profile.**
2. The **Employee profile** page is displayed.
 - a. Perform a search by Employee ID or Name.
 - b. Click the Search button to proceed.

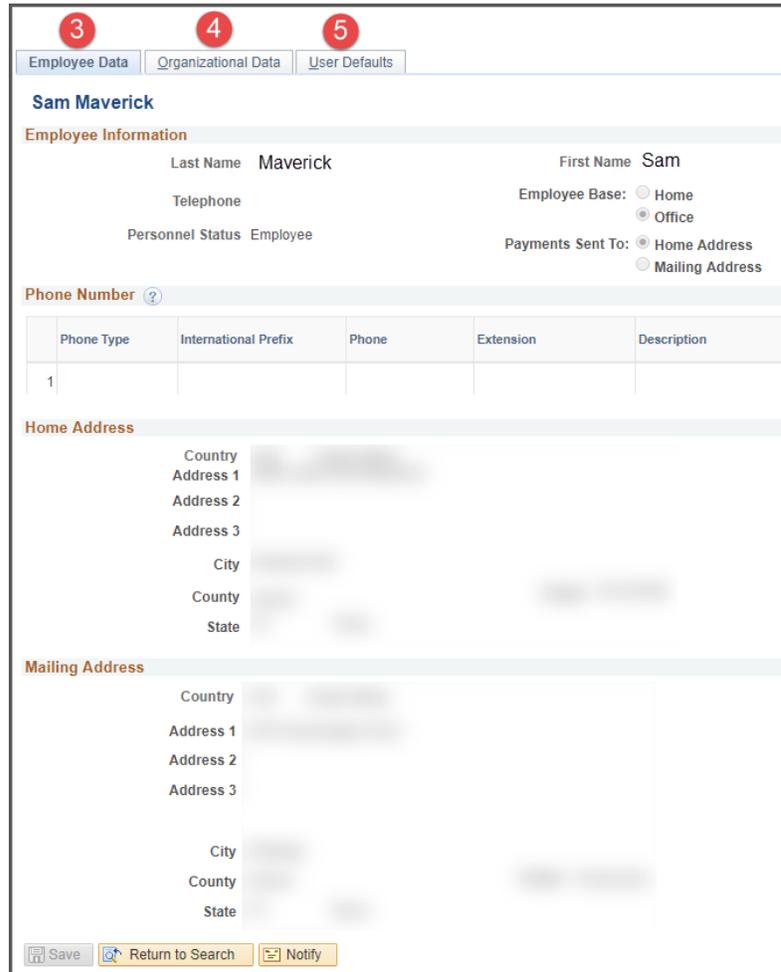


The screenshot shows the 'Employee Profile (Edit)' search interface. At the top, it says 'Employee Profile (Edit)' and 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two buttons: 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' dropdown menu is visible. The search criteria are set to 'Employee ID' and 'begins with'. There is a 'Correct History' checkbox. At the bottom, there are 'Search' and 'Advanced Search' buttons. The footer of the interface repeats the 'Find an Existing Value | Add a New Value' buttons.

3. The **Employee Data** page is displayed. When processing a Travel Authorization or Expense Report in UT Share, a default chartfield string will be applied to the report. Initially, the default chartfield string is pulled from the employee’s HR record; this may not be the accounting information that you want to use for the employee’s reimbursement.

Note: When updating the Employee Profile page, this does not impact the employee's HR record. This change will only apply to future reimbursements through the Travel and Expense pages.

4. The **Organizational Data** page is used to review organizational information for a specific employee. This includes the employee HR status, hire data, department, supervisor, and the default chartfield values that will be used in travel modules in UTShare. Click Save after changes are made as needed.
 - a. If the employee’s travel profile should default to a cost center, changes should be made on this screen under the Default ChartField Values. Cost Centers require GL Unit UTARL, and the appropriate Fund, Cost Center, Function, and Dept
 - b. If the employee’s default travel account should be a Project, the following fields are required: GL Unit – UTARL, Fund, Function, Dept.
 - i. PC Business Unit, Project, and Activity are entered on the User Defaults Page.



Employee Data | Organizational Data | User Defaults

Sam Maverick

Employee Information

Last Name: Maverick | First Name: Sam

Telephone: | Employee Base: Home Office

Personnel Status: Employee | Payments Sent To: Home Address Mailing Address

Phone Number ?

Phone Type	International Prefix	Phone	Extension	Description
1				

Home Address

Country: | Address 1: | Address 2: | Address 3: | City: | County: | State: |

Mailing Address

Country: | Address 1: | Address 2: | Address 3: | City: | County: | State: |

Save | Return to Search | Notify

Employee Data | Organizational Data | User Defaults

Sam Maverick

Expenses Processing Data Find | View All First 1 of 1 Last

Valid for Expenses Yes
Reason for Status Passed All Validation Edits

Default Profile
 Ignore Authorized Amounts
 Ignore Group Location Amounts
 Per Diem Amount Type Active Amounts

HR Information

Employee Status Active
 Hire Date 12/16/2008
 *GL Unit UTARL UT Arlington
 *Department 320105 Business Technology Services
 Hours Per Period Use Business Unit Default

Supervisor Information

*ID 1000123456
 Name Jane Doe
 Designated Approver

Default ChartField Values Personalize | Find | First 1 of 1 Last

*GL Unit	Fund	Cost Center	Function	Program	Affiliate	Fund Affil	Dept
UTARL	3105	310172	700				320105

Cash Advance Level

Business Unit 100,000,000.00 USD
 Specific Amount
 None

Expense Role

"If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company."

Expense Processing Role

Save Return to Search Notify Add

5. The **User Defaults** page is used to review or modify general default preferences for travel authorizations and expense reports. Additionally, if a Project ID has been set up as the employee default chartfield values, this page will display the accounting information that will be used on various transaction pages in UTShare for the employee. Click Save after changes are made as needed.
 - a. If using a Project as the default funding source, select the Enabled checkbox, and enter the PC Business Unit (UTASP, Project, Activity, and Percentage (100 unless splitting costs with multiple accounts) for the Project to be charged.



Note: If necessary, you can click the plus sign located at the end of the row to split the default chartfield string between several accounting lines. The distribution must equal 100%.

Employee Data | Organizational Data | **User Defaults**

Sam Maverick

Default Creation Method

*Expense Report ▼
 *Time Report ▼
 *Travel Authorization ▼

Expense Defaults

Report Description
 Business Purpose ▼
 Originating Location 🔍
 Expense Location 🔍
 Transportation ID 🔍
 Accounting Detail Default View ▼

Per Diem Range ▼
 Billing Type ▼
 Payment Type 🔍
 Credit Card ▼
 Number of Nights

Expense Type Defaults Personalize | Find | | First 1 of 1 Last

Expense Type

*Expense Type	Payment Type	Billing Type		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

Project Defaults for Expenses Personalize | Find | View All | | First 1 of 1 Last

Project Defaults for Expenses

Enabled	PC Business Unit	Project	Description	Activity	Description	Percentage		
<input type="checkbox"/>	<input type="text"/> 🔍	<input type="text"/> 🔍		<input type="text"/> 🔍		<input type="text"/>		

Time Defaults

Country 🔍
 State 🔍
 Locality 🔍
 Billing Type ▼

Select Project ChartFields Display :

- Default : Codes
- Descriptions
- Codes

Project Defaults for Time Personalize | Find | View All | | First 1 of 1 Last