Maintain Employee Profile Job Aid

The purpose of this job aid is to explain how to maintain the Employee Travel 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 Employee Detail.

2. The Employee profile page is displayed. You may perform a search by Employee ID or Name. Click the Search. Select the appropriate employee from the search results below.

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 has multiple positions with different departments and supervisors, ensure the appropriate user profile is selected by checking the **Default Profile** box.

   b. If the employee’s travel profile should default to a different 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**

   c. If the employee’s default travel account should be a Project, the following fields are required: **GL Unit – UTARL, Fund, Function, Dept**.

   **Note:** **PC Business Unit, Project, and Activity** are entered on the **User Defaults Page**.
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%.