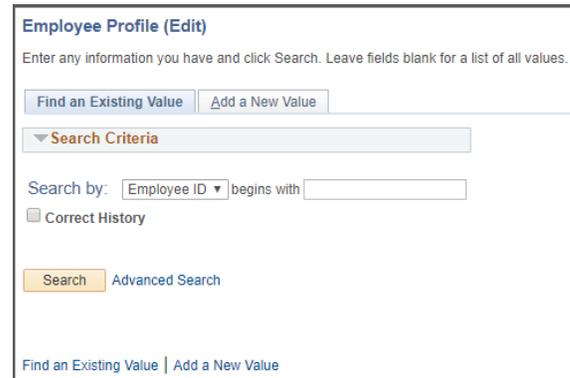


Maintain Employee Profile

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: **Navigator > Finances > Travel and Expenses > Manage Employee Information > Update Profile.**
2. The **Employee profile** page is displayed. You may perform a search by **Employee ID** or **Name.**
 - a. Click the **Search** button to proceed.



Employee Profile (Edit)

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

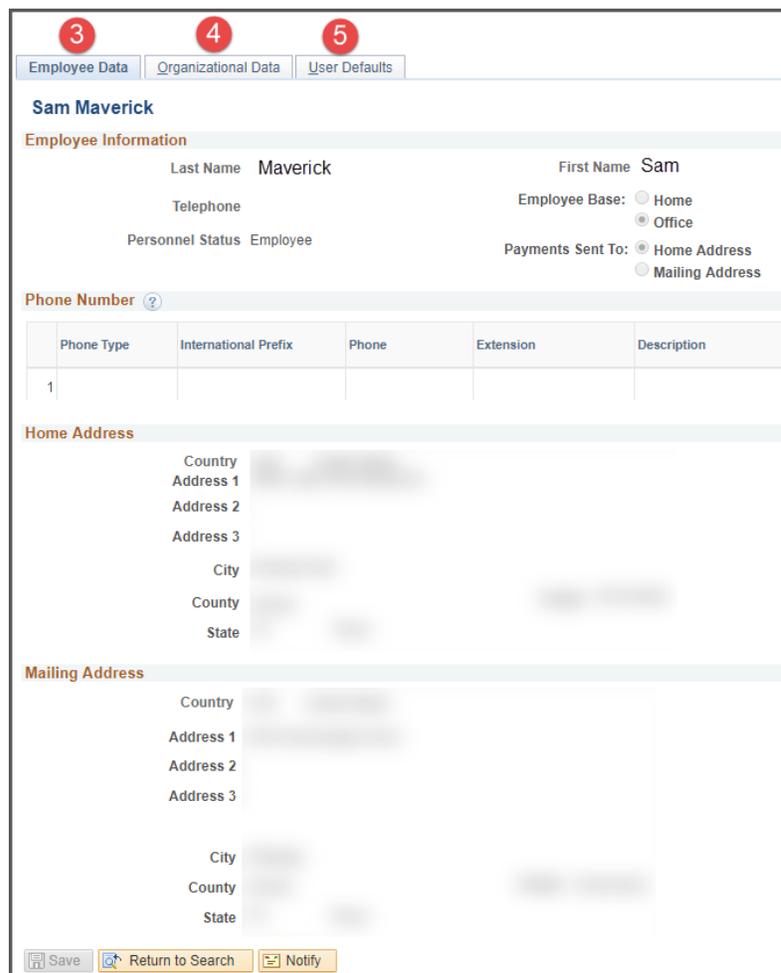
Search by: Employee ID | begins with

Correct History

Search | Advanced Search

Find an Existing Value | Add a New Value

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.



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

4. The **Organizational Data** page is used to review organizational information

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 6001030714

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

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

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

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.
 - i. **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%.*