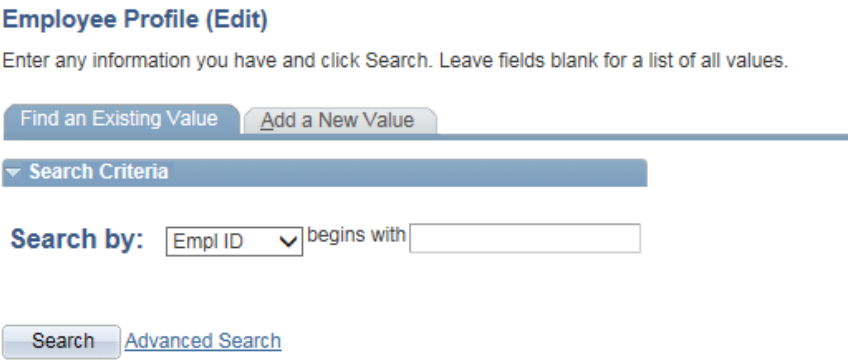


Purpose:	To provide instructions on how to update traveler profiles in the FAST Travel module.
Definition:	Updating the traveler profile enables the traveler’s delegate to modify ChartField information and select the correct profile for workflow purpose.
Navigation:	Main Menu > Travel and Expense > Manage Employee Information > Update Profile
Notes:	<p>To update a traveler profile, the user needs to be set as delegate for the traveler in FAST.</p> <p>To request delegate access, complete and submit the Delegate Assignment Request form following the link: http://usfweb2.usf.edu/uco/travel/travelforms.asp</p> <p>A delegate is able to modify the default chartfield values and change the Default Profile in the employee record.</p> <p>Travel creates and modifies non-employee profiles as per department’s request. To create and/or modify a non-employee profile, the department must submit the Non-employee Profile Creation Request form, available in the travel website http://usfweb2.usf.edu/uco/travel/travelforms.asp.</p>

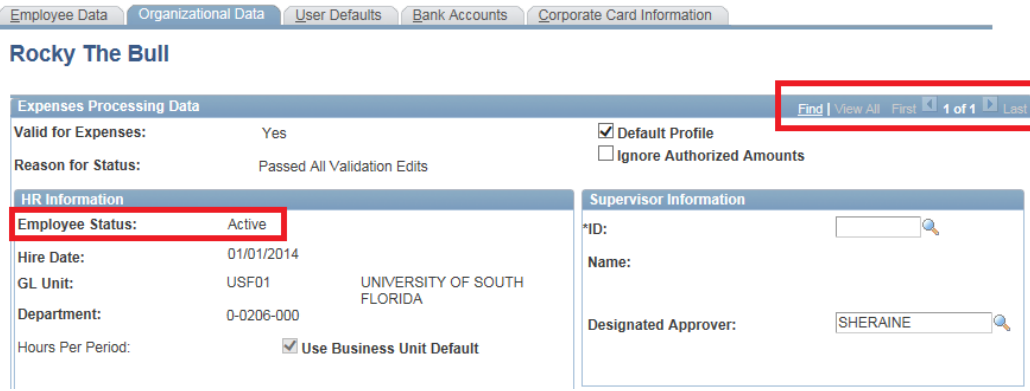
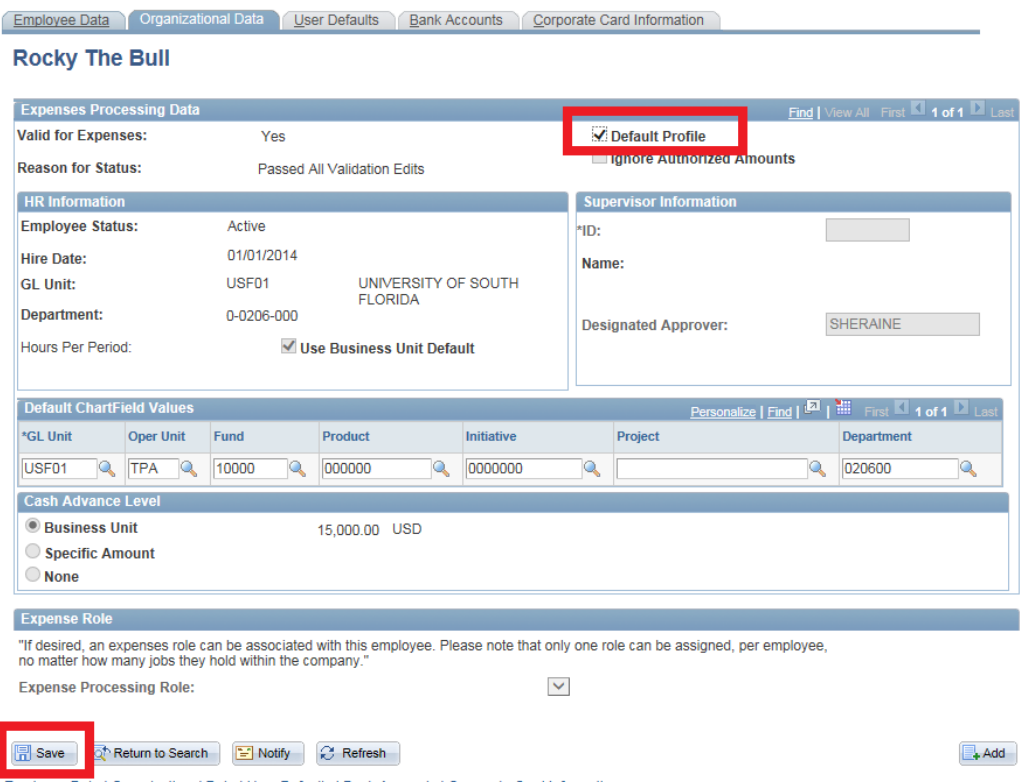
Steps for Updating Traveler Profile:

Steps	Description
1	<p>Follow the above navigation. Once in the page Employee Profile (Edit), enter the Employee ID, and click on the button Search.</p> 

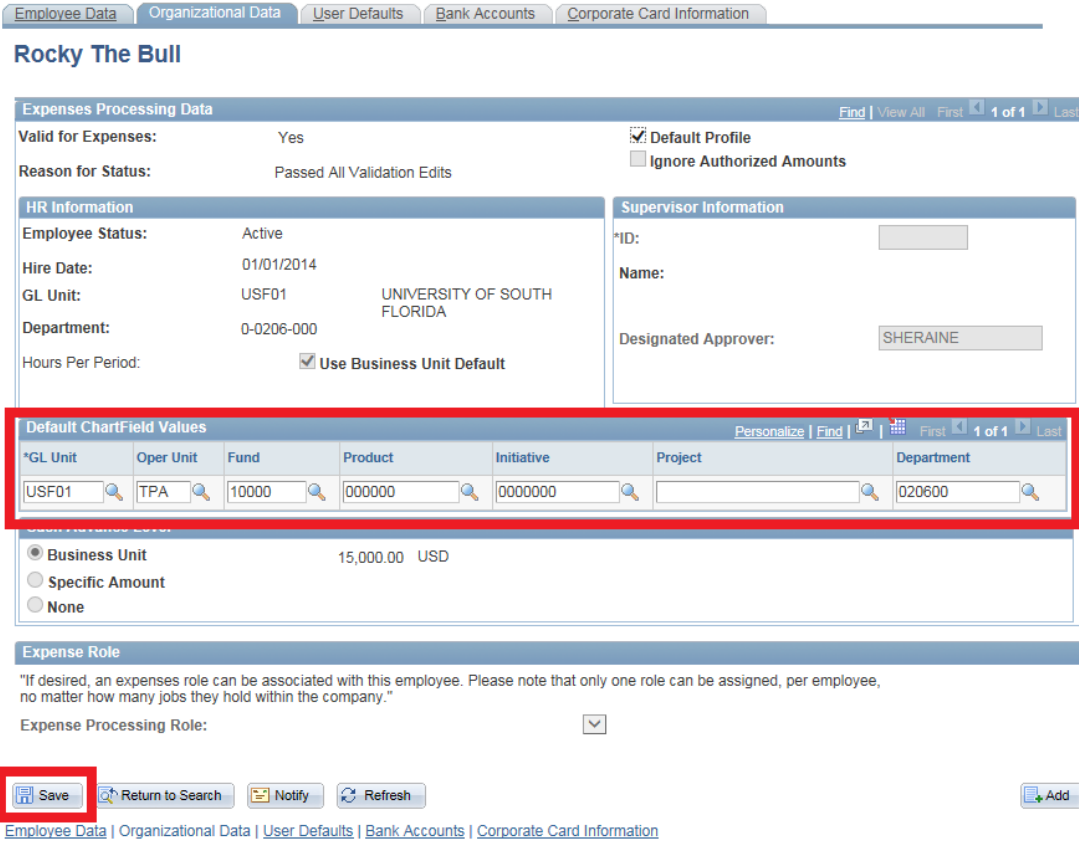
Steps for Updating Traveler Profile:

Steps	Description																																						
	<p>Note: The link Advance Search shown in step #1, enables additional search criteria to find the employee.</p> <div data-bbox="487 415 1218 808" style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: center;">Employee Profile (Edit)</p> <p style="text-align: center;">Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p style="text-align: center;"> <input type="button" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/> </p> <p style="text-align: center;">Search Criteria</p> <p>Empl ID: <input type="text" value="begins with"/> <input type="text"/></p> <p>Name: <input type="text" value="contains"/> <input type="text" value="Rocky"/></p> <p>Last Name: <input type="text" value="begins with"/> <input type="text"/></p> <p><input type="checkbox"/> Case Sensitive</p> <p style="text-align: center;"> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/> <input type="button" value="Save Search Criteria"/> </p> </div>																																						
2	<p>Click on the tab Organizational Data to update the employee profile.</p> <div data-bbox="324 1024 1356 1627" style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: center;"> <input type="button" value="Employee Data"/> <input style="border: 2px solid red;" type="button" value="Organizational Data"/> <input type="button" value="User Defaults"/> <input type="button" value="Bank Accounts"/> <input type="button" value="Corporate Card Information"/> </p> <p style="text-align: center;">Rocky The Bull</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Expenses Processing Data Find View All First 1 of 1 Last</p> <p>Valid for Expenses: Yes <input checked="" type="checkbox"/> Default Profile</p> <p>Reason for Status: Passed All Validation Edits <input type="checkbox"/> Ignore Authorized Amounts</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="2">HR Information</th> <th colspan="2">Supervisor Information</th> </tr> <tr> <td>Employee Status:</td> <td>Active</td> <td>ID:</td> <td><input type="text"/></td> </tr> <tr> <td>Hire Date:</td> <td>01/01/2014</td> <td>Name:</td> <td><input type="text"/></td> </tr> <tr> <td>GL Unit:</td> <td>USF01 UNIVERSITY OF SOUTH FLORIDA</td> <td>Designated Approver:</td> <td>SHERAINE <input type="text"/></td> </tr> <tr> <td>Department:</td> <td>0-0206-000</td> <td></td> <td></td> </tr> <tr> <td>Hours Per Period:</td> <td><input checked="" type="checkbox"/> Use Business Unit Default</td> <td></td> <td></td> </tr> </table> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>Default ChartField Values Personalize Find First 1 of 1 Last</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*GL Unit</th> <th>Oper Unit</th> <th>Fund</th> <th>Product</th> <th>Initiative</th> <th>Project</th> <th>Department</th> </tr> </thead> <tbody> <tr> <td>USF01 <input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td>020600 <input type="text"/></td> </tr> </tbody> </table> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>Cash Advance Level</p> <p><input checked="" type="radio"/> Business Unit 15,000.00 USD</p> <p><input type="radio"/> Specific Amount</p> <p><input type="radio"/> None</p> </div> </div>	HR Information		Supervisor Information		Employee Status:	Active	ID:	<input type="text"/>	Hire Date:	01/01/2014	Name:	<input type="text"/>	GL Unit:	USF01 UNIVERSITY OF SOUTH FLORIDA	Designated Approver:	SHERAINE <input type="text"/>	Department:	0-0206-000			Hours Per Period:	<input checked="" type="checkbox"/> Use Business Unit Default			*GL Unit	Oper Unit	Fund	Product	Initiative	Project	Department	USF01 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	020600 <input type="text"/>
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Steps for Updating Traveler Profile:

Steps	Description														
3	<p>A user may have more than one record. Find the active profile by using the arrows in the right side of the section Expenses Processing Data.</p>  <p>The screenshot shows the 'Expenses Processing Data' section for 'Rocky The Bull'. At the top right, there is a search bar with a 'Find' button and navigation arrows (First, 1 of 1, Last), which are highlighted with a red box. Below this, the 'Valid for Expenses' is 'Yes' and 'Reason for Status' is 'Passed All Validation Edits'. The 'Default Profile' checkbox is checked. In the 'HR Information' section, 'Employee Status' is 'Active', which is also highlighted with a red box. Other details include Hire Date (01/01/2014), GL Unit (USF01), Department (UNIVERSITY OF SOUTH FLORIDA), and a checked 'Use Business Unit Default' option.</p>														
4	<p>To select a profile for the employee, click on the check box Default Profile and click on the button Save.</p>  <p>The screenshot shows the 'Expenses Processing Data' section for 'Rocky The Bull'. The 'Default Profile' checkbox is checked and highlighted with a red box. Below this, there is a 'Default ChartField Values' table and a 'Cash Advance Level' section. At the bottom left, the 'Save' button is highlighted with a red box. The 'Expense Processing Role' dropdown is set to a blank value.</p> <table border="1" data-bbox="292 1417 1291 1501"> <thead> <tr> <th>*GL Unit</th> <th>Oper Unit</th> <th>Fund</th> <th>Product</th> <th>Initiative</th> <th>Project</th> <th>Department</th> </tr> </thead> <tbody> <tr> <td>USF01</td> <td>TPA</td> <td>10000</td> <td>000000</td> <td>0000000</td> <td></td> <td>020600</td> </tr> </tbody> </table>	*GL Unit	Oper Unit	Fund	Product	Initiative	Project	Department	USF01	TPA	10000	000000	0000000		020600
*GL Unit	Oper Unit	Fund	Product	Initiative	Project	Department									
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Steps for Updating Traveler Profile:

Steps	Description
5	<p>To update the ChartField Values in the employee profile, enter the information in the section Default ChartField Values and click on the button Save.</p>  <p>Note:</p> <p>The field Department in the section Default ChartField Values is required when updating the ChartField.</p> <p>To identify when a profile is related to an employee or a non-employee, verify the section Supervisor Information. If the user is an employee the fields ID and Name are populated with the supervisor information from Human Resources, and the Travel department cannot modify this field. If the user is a non-employee, the field Designated Supervisor is populated with the supervisor’s FAST ID; Travel is able to modify this field as per department request. To modify the supervisor’s FAST ID for the user’s profile, the department must submit the Non-employee Profile Creation Request form, available in the travel website http://usfweb2.usf.edu/uco/travel/travelforms.asp.</p>