

Update Travel Profile - PS Financials

When you add employees to the PeopleSoft Expenses System, you need to validate their organizational data before PeopleSoft Expenses marks the employees as valid for expense entry. To update an employee you follow the steps in the order indicated below. After completion you will click the "Validate" button on the User Profile - Organization Data page to initiate the validation process for that employee.

Organizational Data:

Employee Data | **Organizational Data** | User Defaults | Bank Accounts | Corporate Card Information

Anthea Vadasz

Expenses Processing Data Find | View All | First | 1 of 2 | Last

Valid for Expenses: No Default Profile
 Reason for Status: Invalid Business Unit Ignore Authorized Amounts

HR Information		Supervisor Information	
Employee Status:	Active	*ID:	1507702
Hire Date:	06/12/2017	Name:	Markey, Kristi Diane
*GL Unit:	NAUBU Northern Arizona University		
*Department:	4030010 Comptrollers Office		
Hours Per Period:	<input checked="" type="checkbox"/> Use Business Unit Default		

Default ChartField Values Personalize | Find | First | 1 of 2 | Last

*GL Unit	Fund	Program	SubDept	Affiliate	Fund Affil	Dept
NAUBU						4030010

Cash Advance Level

Business Unit 5,000.00 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:

HR Information section:

Department: Enter the travelers Department ID that he/she will most commonly expense. If a profile has multiple pages, the Department ID must be entered on all pages, no matter the status **PRIOR** to save.

The dept field may contain a 5 digit number which is an HR dept #. Replace this 5 digit # with the 7 digit Speedchart department #.

Default Profile Check Box: This box is typically checked. If a profile has multiple pages, the default must be on a page with an Employee Status "active".

Click SAVE: You MUST "save" after inserting the Department ID on all pages and selecting the Active page that will be the Default Profile.

Validate Button: Click the "Validate" button to complete the process.

If you receive any errors, please send a screen shot to the PeopleSoft Financials help desk: Ask-FAS@nau.edu for assistance.