EX.060.010 – INQUIRING ON AN EMPLOYEE'S PROFILE (CORE)

Purpose	• To identify what settings may be reviewed when inquiring on an employee's profile. • To identify how an employee may inquire on their own profile, and how administrators can see the same information. • To identify what may overwrite any changes an administrator makes in the Employee profile. • To inquire on an employee's profile.
Description	You may review an employee's profile to examine employee information settings and expense reimbursement options. An employee and/or manager may only update and review his/her own Employee Profile by using the self-service portal for Expenses. Most of the fields accessed through this self-service portal path are read-only for employees and managers and are meant for informational purposes only. Through the core application, administrators can review and make updates to the profiles of all institutional employees. **CAUTION:** Much of the viewable data in an Employee's Profile within the Expenses module has been populated by the integration with the Human Resources Management System (HRMS). Through the Core system, you can update many of the fields in an employee's profile. However, the next time an employee changes that same field in the HR module, the change on the HR side will overwrite any previous changes on the Core Financials side. • When inquiring on an employee's profile, you can review Employee Data, Organizational Data, User Defaults, and Bank Accounts. • An employee and/or manager may only update and review his/her own Employee Profile by using the self-service portal for Expenses. Administrators access the same information through the Core system. • When making changes to an Employee Profile in the Core system, the data may be overwritten if the employee changes the same data in the HR module.

Security Role	**BOR_EX_ADMINISTRATION**
Dependencies/ Constraints	None
Additional Information	None

Procedure

For this topic, inquire on the Employee Profile for Christina Hobbs. Let us see how this is done.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** link.
3.	Click the **Travel and Expenses** link.
4.	Click the **Manage Employee Information** link.
5.	Click the **Update Profile** link.
6.	Click the **Search** button to display a listing of Employee IDs.
7.	Click an entry in the **Employee ID** column.
8.	The **Employee Data** tab displays an Employee's general information as well as his/her home and mailing addresses.
9.	The **Send Payments To** box identifies which address (Home or Mailing) that checks will be delivered to if the employee is set to receive expense reimbursements by check.
10.	Click the **Organizational Data** tab.
11.	The Organizational Data tab displays an employee's Expenses Processing Data and his/her Default Chartfield Values.
12.	If the employee whose profile you are reviewing is an approver, he/she must have a valid User ID listed in the **Designated Approver** field. This is so that Workflow can properly route a transaction to an identified user (set by this field) if the system cannot determine the appropriate approver based on the configuration.
13.	Click the **User Defaults** tab.
14.	The **User Defaults** tab is where an employee can specify his/her overall expense preferences and expense default settings.
15.	Click the **Bank Accounts** tab.

Step	Action
16.	The Bank Accounts tab displays the employee's Payment Method and Bank Account information.