Expense Profile Request

Quick Reference Guide

Topic: How to Request Changes to Expense Profile
Purpose: Instructions for Users Needing a Change to Expense Profile
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Document History

No.	Date of Change	Changed By	Description of Change
1.	03/15/24	Financial Systems Admin	Original Version
2.			
3.			

Contents

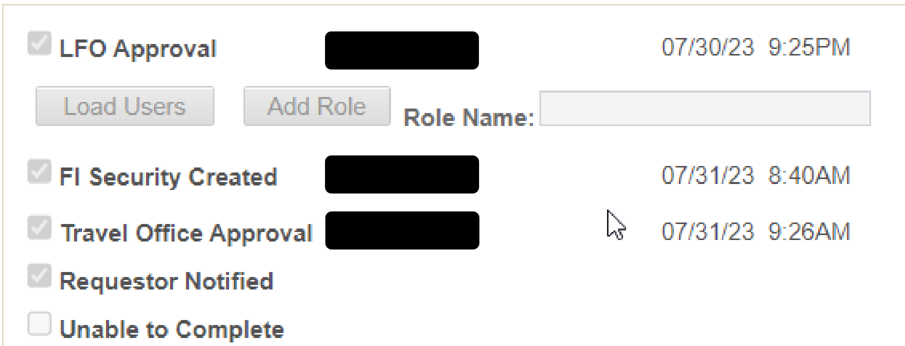
Introduction/Purpose

University of Louisville has several different processes that rely on an accurate and up-to-date Expense Profile. The expense profile will identify the user's Supervisor for approval routings as well as Proxy information (who can enter expense transactions on your behalf), and your Speedtype setting.

If you have submitted a transaction, i.e. Expense Report, that cannot route you should expect that the expense report will be sent back with comments that you need to submit an Expense Profile Request. This usually happens if your assigned Supervisor is blank or in terminated status. In this case, you would submit an Expense Profile Request to update your Expense Profile with a new supervisor and indicate the supervisor's information.

If you need to make a change to your Expense Profile you will make this request by following this procedure and the **Step-by-Step** instructions that follow in this document.

You should notice in this procedure that when you submit an Expense Profile Request it will route through the following areas for approval and action:



LFO (Lead Fiscal Officer): Reviews the request and approves or marks Unable to Complete.

FI Security Created: PeopleSoft Security Administrator that will take action on the request.

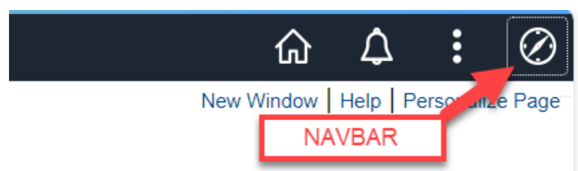
Travel Office Approver: Takes action on updating the expense profile.

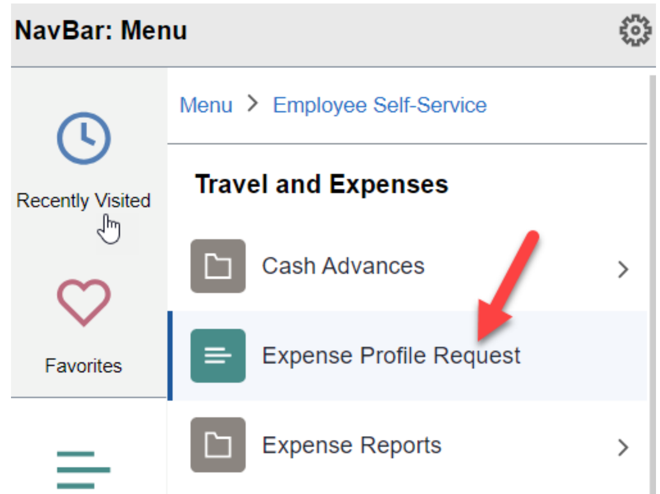
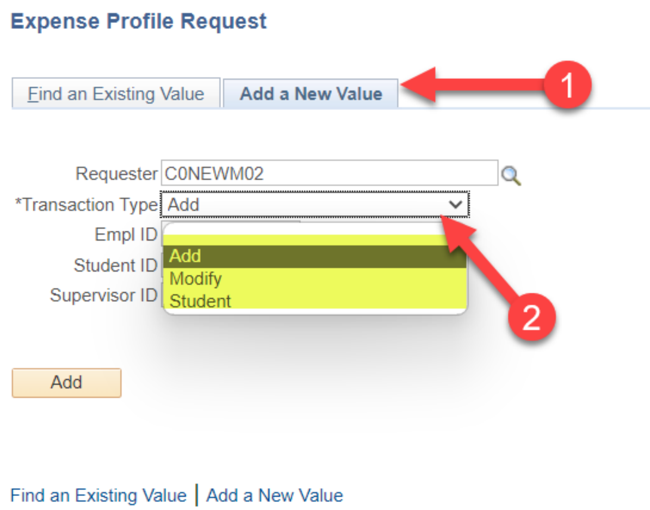
Requestor Notified: This checkbox indicates that notification was sent back to the person making the Expense Profile request.

Unable to Complete: This checkbox indicates that the request cannot be completed and the requestor should expect information as to the reason.

STEP BY STEP INSTRUCTIONS

To make an expense profile request please follow these steps:

Step	Navigation/Field Name	Illustration
1.	Log into PeopleSoft Financials system with UserID and password.	
2.	At the top right-hand side of the page, you will see the **NAVBAR**. Click on this to expose the menu options.	

Step	Navigation/Field Name	Illustration
3.	Navigate to: Menu > Employee Self-Service > Travel and Expenses > Expense Profile Request	
4.	**READ CLOSELY:** At the top tabs, click on the **Add a New Value** tab to create the Expense Profile request. __Requestor__ is person making the request, this will default as the **Requestor's PS UserID**. Transaction Type: • **Add** – making a request for a brand-new profile where the user does not have a profile (rare) • **Modify** – making a request to change an existing profile (normal) • **Student** – need to add or modify a Student profile (normal) *Continue to next Step…*	

<table>
<tr><th>Step</th><th>Navigation/Field Name</th><th>Illustration</th></tr>
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<td>5.</td>
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<u>NON-STUDENT REQUEST:</u>

For a non-student request, select the Empl ID of the person's profile that needs to be Added or Modified. Leave Student ID and Supervisor ID blank.

<u>STUDENT REQUEST:</u>

For a student request, leave the Empl ID field blank and enter the Student ID. ***<u>Note</u>*****<u>:</u>** Student IDs should be prefixed with an '**S**' at the beginning of the ID. Leave Empl ID and Supervisor ID blank.

Finally, click on the **Add** button.

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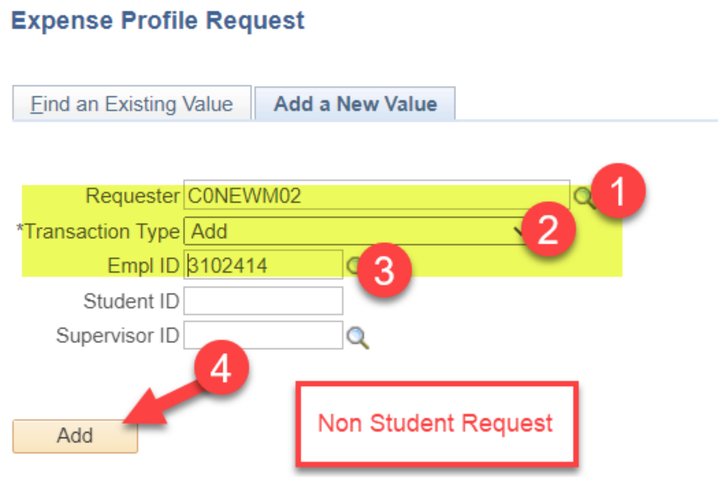
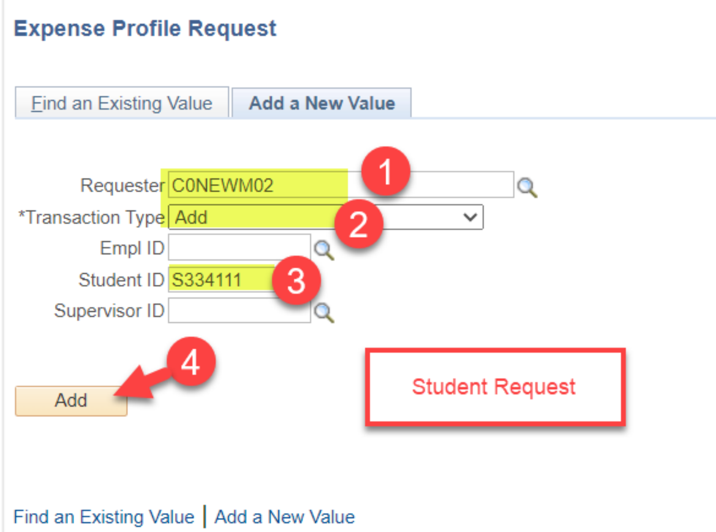
<u>NON STUDENT PAGE SHOT:</u>



<u>STUDENT PAGE SHOT:</u>



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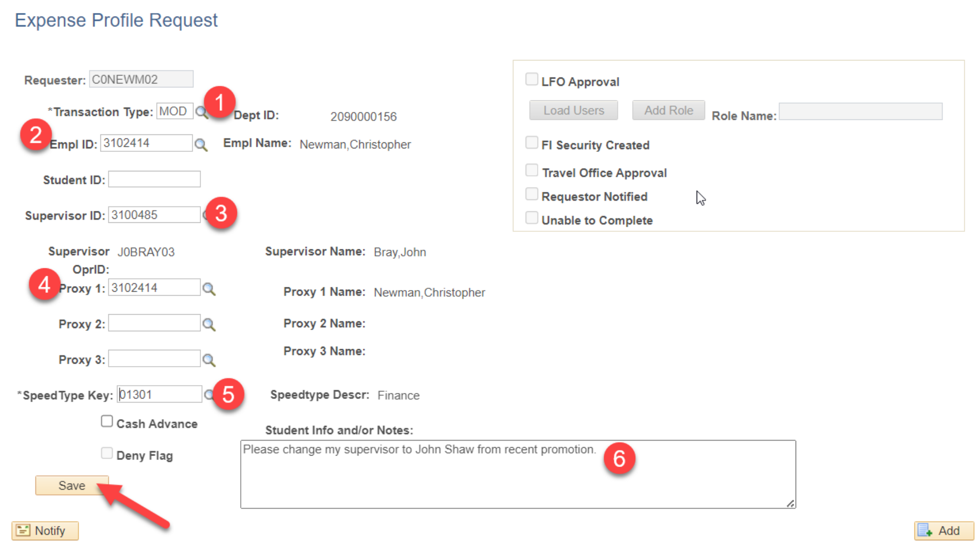
Step	Navigation/Field Name	Illustration
6.	Complete the fields and click on the **Save** button. Here is a description of the fields (* indicates required field): ***Transaction Type:** **MOD** – modify the profile **ADD** – create new profile **STU** – student profile ***Empl ID:** Employee ID for profile to add/update **Student ID:** Starts with ‘S’ and used for students ***Supervisor ID:** Supervisor ID of Requestor ***Proxy 1:** Employee ID of person that can enter expense report transaction on behalf of the Requestor. Note – field is required so just use your own Empl ID if you don’t need a Proxy. **Proxy 2/3:** Not required enter Empl ID if you need multiple Proxies. ***Speedtype Key:** Enter your speedtype and if you are unsure you can contract your unit’s Business Manager/Financial Administrator for that info. **Cash Advance:** Check if you are requesting ability to have cash advance (usually students in group travel).	

Step	Navigation/Field Name	Illustration
	Student Info/Notes: Encourage you to add any notes/instructions that might help the person that will update the profile. Finally, click on the **SAVE** button to submit the request.	
7.	**Explanation of Routings:** After you click on the **Save** button the request **<u>will route to the requestor's LFO</u>** (Lead Fiscal Office) for approval. Then, it routes to the PeopleSoft Security Administrator. Then, it routes to the Travel Office, who will make the entry. Finally, you will be notified that the change has been made or they may request more information. Once the profile is complete, you can submit your transactions (expense reports, etc.) and they should route properly.	
8.	**QUESTIONS?** If you have any questions on how to complete the request, you can reach out to your Business Manager/Finance Administrator or send an email to finsys@louisville.edu and someone in the Financial Systems Administration area will respond to your questions.	
END OF PROCEDURE		