

# Expenses Profile Request

Log into the Financial System.

Navigate to Navigator > Employee Self-Service > Travel and Expenses > Expense Profile Request

The screenshot shows the 'Expense Profile Request' form with the following elements:

- Buttons: 'Find an Existing Value' and 'Add a New Value'.
- Fields: 'Requester' (text input), 'Transaction Type' (dropdown menu), 'Empl ID' (text input), 'Student ID' (text input), and 'Supervisor ID' (text input).
- Each ID field has a magnifying glass icon for search.
- Bottom button: 'Add'.

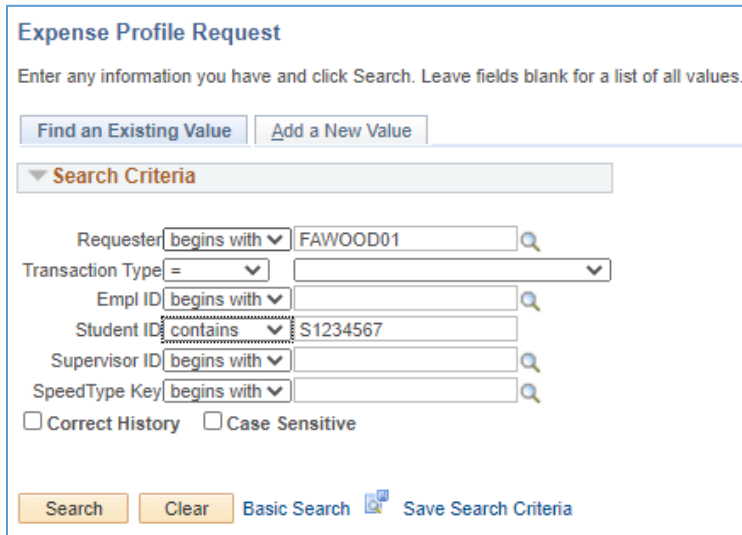
Select “Add a New Value” and a Transaction Type to request a new profile or modify of an existing profile for an employee or to add a student. **Note: New field for Student ID.** The Student Expense Profiles are set up with a prefix of ‘S’.

The screenshot shows the 'Expense Profile Request' form with the following elements:

- Requester: FAWOOD01
- \*Transaction Type: STU
- Dept ID: (empty)
- Empl ID: (empty)
- Empl Name: (empty)
- Student ID: S1234567
- Supervisor ID: (empty)
- Supervisor OprID: (empty)
- Supervisor Name: (empty)
- Proxy 1: (empty)
- Proxy 1 Name: (empty)
- Proxy 2: (empty)
- Proxy 2 Name: (empty)
- Proxy 3: (empty)
- Proxy 3 Name: (empty)
- \*SpeedType Key: (empty)
- Speedtype Descr: (empty)
- Checkboxes:  LFO Approval,  FI Security Created,  Travel Office Approval,  Requestor Notified
- Student Info and/or Notes: (empty text area)
- Buttons: 'Save', 'Notify', and 'Add'.

For Student Profile Request enter the name and address in the Student Info Notes section.

Select “Find an Existing Value” to view the existing Expense Profile defaults or history of Expense Profile Requests. Remove the Requester ID and enter the Empl ID or Student ID to search.



The image shows a web form titled "Expense Profile Request". At the top, it says "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this are two buttons: "Find an Existing Value" and "Add a New Value". A section titled "Search Criteria" contains several search fields: "Requester" (dropdown: "begins with", text: "FAWOOD01"), "Transaction Type" (dropdown: "=", empty), "Empl ID" (dropdown: "begins with", empty), "Student ID" (dropdown: "contains", text: "S1234567"), "Supervisor ID" (dropdown: "begins with", empty), and "SpeedType Key" (dropdown: "begins with", empty). Each field has a magnifying glass icon. At the bottom left are checkboxes for "Correct History" and "Case Sensitive". At the bottom right are buttons for "Search", "Clear", "Basic Search" (with a magnifying glass icon), and "Save Search Criteria".

A few items to note:

- The appropriate approval checkboxes will be displayed in order: LFO first, FI Security Role second and Travel Office third. An approval request notification, with a URL link, will be sent to the appropriate approvers every time the Expenses Profile Request is saved. Example: LFO checks approval box and saves, a notification is sent to FI Security. The Requestor Notified box will be updated when the final notification of approval is sent to the Requestor. **Note: A time date stamp has been added for each level of approval.**
- If the Dept ID field does not automatically populate, as in adding a student, the department associated to the SpeedType will be used to route the request to the LFO for approval.
- Access to the deny process is available to the LFO only. An email of denial is sent to the Requester. After the transaction is denied, no one can update the transaction. The “Deny Flag” is visible on the Find Existing Value page.
- If any changes need to be made to the request, prior to the final approval, the LFO must be notified to uncheck the LFO Approval box. Unchecking the LFO Approval box automatically unchecks all of the other approval boxes. The fields will then be available for the Requestor to update the request. The process will start from the beginning with the LFO receiving an approval request notification.