Editing Employee Organizational Data

Purpose: Use this document as a reference for editing employee organizational data in the **Travel and Expenses profile** within ctcLink.

Audience: Finance and Business Office staff.

❗ You must have at least one of these local college managed security roles:

• ZZ Expenses User Admin

   If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

⚠️ **Note**: The information that this QRG is referencing is HR record information. The only fields that should be updated here are the Default Chartfields. Typically, all other fields are updated through HR records. **Note: Users cannot update their own Expenses Profile.**

❗ The **GL Unit** and **Oper Unit** are required (at the minimum) to be able to process Expenses. This must be done before your end users enter Expense Documents. If this is done **after,** any existing documents will need to be deleted and re-entered.

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Navigator: Travel and Expenses > Manage Employee Information > Update Employee Detail

💡 Configuring User Defaults reduces the amount of data entry required to complete Travel Authorizations and Expense Reports. These defaults may be configurable or may be controlled by others, depending on security privileges. Keep in mind that default values can be changed; they are merely a convenience.

1. Enter the desired information into the **Search by** field.
2. Select **Search**.
3. Select the **Organizational Data** tab.
4. Use the **Organizational Data** page to assign an employee to a general ledger business unit and a department for expense reimbursement. The employee's business unit determines such things as accounts to charge, allowable mileage rates, and cash advance limits.
5. The **Expenses Processing Data** section indicates whether the employee's organizational data is validated, verifying that the employee is eligible for expense processing.
6. ctcLink verifies whether the employee's organizational data is valid and whether the employee is eligible for expense processing in the **Valid for Expenses** field. If the employee ID is not valid for expenses (and should be) please submit a [Service Desk](#) ticket.
7. The **HR Information** section displays information about an employee's organizational affiliation. This information comes over from human resources; however, you can manually change these fields.
8. Select the **Use Business Unit Default** checkbox for **Expenses** to use the time reporting thresholds established for the employee's general ledger business unit.
9. The **Supervisor Information** section displays information about the employee's supervisor. This information comes over from human resources; however, you can manually change this. The supervisor identified here may be one of the approvers for the employee's travel authorizations and expense reports as defined in the approval rules. If there is a reporting manager in the employee's HR data but no supervisor, then the system displays the reporting manager's ID instead.
10. In the **Default ChartField Values** section, enter the **Operating Unit** (required field) or more of the ChartField values for this employee profile. The system uses these values to populate the default accounting information of expense-related transactions for the employee.
11. Some employees may have more than one profile if they work in multiple departments or jobs. **If an employee has multiple profiles, you must select ONE of the Active records as the Default Profile in order for the employee to be eligible to enter expense transactions.**

> ⚠️ Note: There should only be one **Default Profile** selected for each employee, otherwise your Pay Cycle will fail when paying out expenses. Use query **QFS_EX_EMPL_DEFAULT_DUP** to check if your employees have more than one profile set to **Default.**

12. For the **Cash Advance Level** Section, chose one of the following options:
    - Select **Business Unit** to indicate that the maximum amount for the business unit applies to the employee. The system displays the amount.
    - Select **Specific Amount** to open a new field to input the maximum advance amount authorized for the employee.
        - Enter the desired information into the **Specific Amount** field.
    - Select **None** if the employee is not authorized for cash advances.

13. Select **Save.**

> ❗ Leave the **Expense Processing Role** blank.

14. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial Via Panopto

View the external link to Editing Employee Organizational Data. This link will open in a new tab/window.