

## Maintaining Traveler Data in HRM

The purpose of this QRG is to provide instructions for entering/updating Traveler Proxy and Traveler Accounting information in the Human Resources Management system. HRM is an employee data system that stores the data needed to enable Travel Management to create and process documents for travelers. While the majority of necessary data is populated via interface from the State's Human Resources Information System (HRIS), there is some information specific to Travel that must be maintained on the HRM system. This guide will detail the process for updating these fields.

### Travel Specific Fields

Two types of data stored in HRM that are specific to Travel and maintained at the agency level. The first of these is Accounting Template information. This information is used by agencies when a traveler is reimbursed for his or her travel expenses from funding other than where the traveler's payroll expenses are posted. When a traveler will be paid from a different accounting stream on a regular basis, the agency may choose to save this information on the traveler's profile in HRM by assigning an Accounting Template.

The second type of Travel specific data is Proxy information. In the Travel system, proxies are other employees who have been authorized to create, edit, and/or submit Travel documents in the Travel Hub on behalf of others. Up to five proxies can be assigned for each individual traveler. The General Accounting Office has assigned the traveler's supervisor and the supervisor's supervisor as proxies for all travelers. Agencies may assign proxies to the Proxy 3, 4, and 5 fields in HRM.

### Viewing and Modifying Traveler Data

To view the data currently on a Traveler's profile, you will utilize the EPM screen. This screen will give you a summary view of most of the traveler's information. From this screen, you will be able to see the fields you need to maintain/change and will be able to initiate a modification of the information. When you modify the information, you will be creating a DEPTD (Department Specific Data) document.

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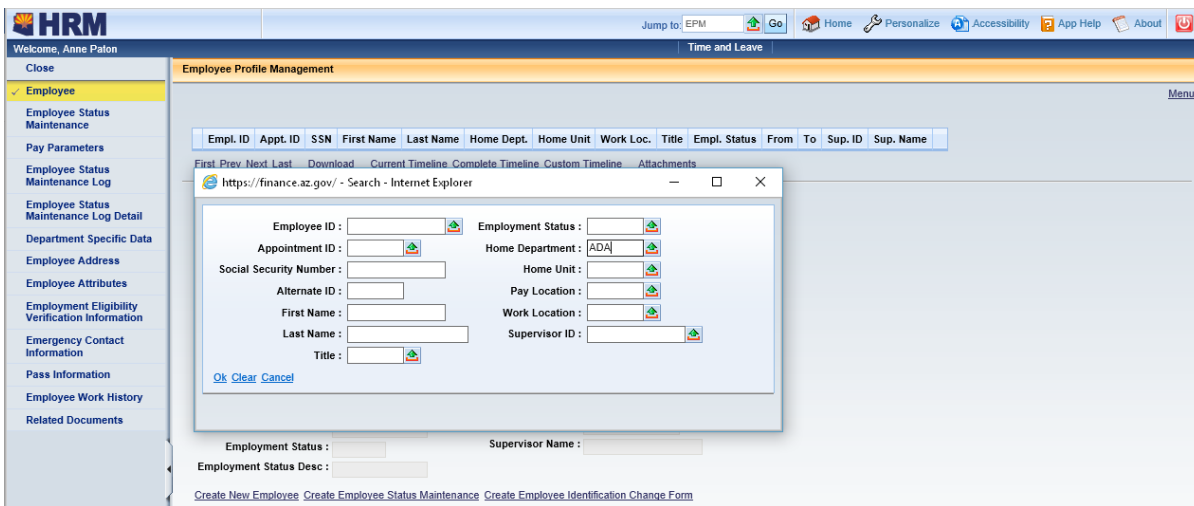
To view a traveler's profile information, follow the steps below:

- 1) Log in to HRM
- 2) In the *Jump To* field at the top of the page, **type** EPM and **click** Go.



- 3) A search screen will be displayed. **Enter** your search criteria and **click** OK.

**Note:** Entering Home Department by itself will display all agency travelers. This data can be narrowed by using Home Unit. Individual travelers can be found using Employee ID, or First Name and Last Name. Multiple travelers can be searched by using Traveler IDs, separated by a comma.



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4) A summary screen will be displayed. If the search results include multiple travelers, the line highlighted in orange indicates which traveler's information is being displayed.

The screenshot shows the HRM Employee Profile Management interface. The left navigation pane includes sections like Employee, Department Specific Data, and Employee Address. The main content area displays a 'Current Timeline' table with one highlighted row for employee APATON. Below the table is a search form with various fields for filtering.

Empl. ID	Appt. ID	SSN	First Name	Last Name	Home Dept.	Home Unit	Work Loc.	Title	Empl. Status	From	To	Sup. ID	Sup. Name
APATON			Anne	Paton	AAA	A100	TRAVEL	TRAVEL	A	01/01/2016	12/31/9999		

5) On the left navigation panel, click on *Department Specific Data*.

The screenshot shows the HRM Department Specific Data screen. The left navigation pane is expanded to show 'Department Specific Data' with sub-items like General Information, Employment Information, and Traveler Information. The main content area displays detailed information for employee APATON, including a 'Current Timeline' table and a search form.

Department Action	Department Action Reason	Home Department	Home Unit	Pay Location	Work Location	Supervisor ID	Supervisor Name	From	To
HIRE	A	AAA	A100	TRAVEL	TRAVEL			01/01/2016	12/31/9999

6) **Expand** the *Employment Information* and *Traveler Information* by **clicking** on the small arrows to the left of the section headers. This will expand the view to the Accounting Template and Proxy fields. From here,

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you can verify the information in the Accounting Template and Employee Proxy ID 3, 4, and 5 fields. If the data in these fields needs to be changed, **click *Modify Department Specific Data*** at the bottom of the screen. This will create a DEPTD document.

The screenshot displays the HRM system interface for maintaining traveler data. The top navigation bar includes the HRM logo, user name 'Welcome, Anne Paton', and various utility icons. The left sidebar contains a menu with options like 'Employee', 'Employee Status Maintenance', 'Pay Parameters', and 'Department Specific Data' (which is currently selected). The main content area shows the following details:

Employee ID : APATON Name : Paton, Anne  
 Appointment ID :

Current Timeline

Department Action	Department Action Reason	Home Department	Home Unit	Pay Location	Work Location	Supervisor ID	Supervisor Name	From	To
✓ HIRE	A	AAA	A100	TRAVEL	TRAVEL			01/01/2016	12/31/9999

Below the table are navigation links: First, Prev, Next, Last, Download, Current Timeline, Complete Timeline, Custom Timeline, Attachments.

The 'Department Specific Data' section is expanded to show three sub-sections:

- General Information:** Home Department: AAA, Home Department Desc: GAO, Home Unit: A100, Home Unit Desc: GAO, Department Action: HIRE, Department Action Desc: HIRE NEW EMPLY, Department Action Reason: A, Department Action Reason Desc: TRAVEL. From: 01/01/2016, To: 12/31/9999.
- Employment Information:** Pay Location: TRAVEL, Pay Location Desc: TRAVEL DEFAULT, Work Location: TRAVEL, Work Location Desc: TRAVEL DEFAULT, Seniority Date, Seniority Number, Department Specific ID, Work Cycle, Work Cycle Desc, Supervisor ID, Supervisor Name, Supervisor Appointment ID.
- Traveler Information:** Traveler: , Travel Policy: ADOA, Employee Proxy ID 1: FBURKHART, Employee Proxy ID 3, Employee Proxy ID 5, Allow Employee Advances: , Eligible for Proxy Selection: , Employee Proxy ID 2, Employee Proxy ID 4, Travel Accounting Profile, Travel Accounting Template: 10016, ESS Accounting Allowed: .

At the bottom, there are links for 'Top', 'Create Department Specific Data', and 'Modify Department Specific Data'.

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7) Verify the traveler information is correct.

The screenshot displays the HRM software interface for maintaining traveler data. The top navigation bar includes the HRM logo, a user welcome message 'Welcome, Anne Paton', and utility links like 'Jump to: EPM', 'Go', 'Home', 'Personalize', 'Accessibility', 'App Help', and 'About'. Below this, a breadcrumb trail shows 'Department Specific Data(DEPTD) Dept: AAA ID: 17000000185 Ver.: 1 Function: New Phase: Draft' and a 'Modified by' field.

The main content area is titled 'Header' and contains an 'Action:' section with radio buttons for 'No Action', 'Update' (selected), and 'Delete'. A 'List View' button is located in the top right corner.

Below the header, there are three tabs: 'General Information', 'Employment Information', and 'Traveler Information'. The 'General Information' tab is active, showing a form with the following fields:

*Employee ID:	APATON	*From:	01/01/2016
Appointment ID:		To:	12/31/9999
Name:	Paton, Anne	*Department Action:	HIRE
Home Department:	AAA	Department Action Desc:	HIRE NEW EMPLOY
*Home Unit:	A100	Department Action Reason:	A
Home Unit Desc:	GAO	Department Action Reason Desc:	TRAVEL

At the bottom of the form, there are buttons for 'Save' and 'Undo'. Below the form, a row of buttons includes 'Copy', 'Validate', 'Submit', 'Discard', 'Print', 'Processing', 'Workflow', 'File', and 'Close'.

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8) Click on the *Traveler Information* tab.

The screenshot displays the HRM system interface. At the top, there is a navigation bar with the HRM logo, a user welcome message "Welcome, Anne Paton", and various utility links like "Home", "Personalize", "Accessibility", "App Help", and "About". Below this is a breadcrumb trail: "Department Specific Data(DEPTD) Dept: AAA ID: 17000000185 Ver.: 1 Function: New Phase: Draft". The main content area is titled "Header" and contains an "Action:" section with radio buttons for "No Action", "Update" (selected), and "Delete". A "List View" button is located in the top right corner. The "Traveler Information" tab is active, showing a form with the following fields:

Traveler: <input checked="" type="checkbox"/>	Allow Employee Advances: <input type="checkbox"/>
Travel Policy: ADOA	Eligible for Proxy Selection: <input checked="" type="checkbox"/>
Employee Proxy ID 1: FBURKHART	Employee Proxy ID 2: <input type="text"/>
Employee Proxy ID 3: <input type="text"/>	Employee Proxy ID 4: <input type="text"/>
Employee Proxy ID 5: <input type="text"/>	Travel Accounting Profile: <input type="text"/>
	Travel Accounting Template: 10016
	ESS Accounting Allowed: <input checked="" type="checkbox"/>

At the bottom of the form, there are buttons for "Save", "Undo", "Copy", "Validate", "Submit", "Discard", "Print", "Processing", "Workflow", "File", and "Close".

9) In the appropriate field, **click** the green arrow and **select** the correct value. Once all fields have been updated, **click** *Validate* and *Submit* at the bottom of the document.

**Note:** There is no workflow in HRM – if the document successfully Validates and Submits, it will be in Final status. If a value was selected erroneously and the document is processed to final, close the document and repeat steps 1-9 to correct the value(s).