

Setting User Defaults in the PeopleSoft Travel and Expense Module

- You can modify your User Defaults to minimize the amount of data entry you have on expense transactions.
- User Defaults load into any new expense transaction you create. You can still override these at any time when creating a new transaction.

Employee Data
Organizational Data
User Defaults
Bank Accounts

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Default Creation Method

Online	Mobile - Laptop
*Expense Report: <input style="width: 80%;" type="text" value="Copy From a Template"/>	Expense Report: <input style="width: 80%;" type="text" value="Open a Blank Report"/>
*Time Report: <input style="width: 80%;" type="text" value="Open a Blank Report"/>	Time Report: <input style="width: 80%;" type="text" value="Open a Blank Report"/>
*Travel Authorization: <input style="width: 80%;" type="text" value="Copy From a Template"/>	

Expense Defaults

Entry Method: <input type="text" value="Occasional User"/>	Per Diem Range: <input type="text"/>
Report Description: <input type="text"/>	Billing Type: <input type="text" value="Internal"/>
Business Purpose: <input type="text"/>	Expense Location: <input type="text"/>
Originating Location: <input type="text" value="GAATL"/>	Credit Card: <input type="text"/>
Payment Type: <input type="text" value="AMX"/> American Express	Number of Nights: <input type="text"/>
Transportation ID: <input type="text"/>	

Expense Type Defaults Customize | Find | First 1 of 1 Last

Expense Type: Merchant

*Expense Type	Payment Type	Billing Type
<input type="text" value="Auto Mileage - Tier1"/>	<input type="text" value="N/A (e.g. Mileage)"/>	<input type="text" value="Internal"/>

Project Defaults for Expenses Customize | Find | View All | First 1 of 1 Last

Enabled	Project	Activity	PC Business Unit	Description	Description
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

1. **Default Creation Method** = indicates how you want to begin new Expense Reports and Travel Authorizations
 - a. Copy from a Template
 - b. Copy from a Travel Authorization (available for Expense Reports only)
 - c. Copy an Existing Report
 - d. Open a Blank Report
2. **Entry Method** = Leave blank or select Occasional User
3. **Report Description** = If you have a value here, it will default into every new expense transaction you create.
4. **Business Purpose** = If you choose a value here, it will default into every new expense transaction you create. This is helpful if you travel for the same purpose the majority of time.
5. **Originating Location** = Where you initiate your travel from
 - a. Use the Look Up button to select your location
 - b. This field will not accept the “City, ST” format.
6. **Payment Type** = If you generally pay with the same method every time, you can default it here so you don’t have to add it to every expense line you create.
7. **Transportation ID** = Not in use
8. **Per Diem Range** = Not in use
9. **Billing Type** = Internal
10. **Expense Location** = If you travel to the same location every time, this may be helpful to default here.
11. **Number of Nights** = When you travel, if it is always for the same number of nights, you can specify that here so it will default into any lodging expense line.
12. **Expense Type Defaults** = You can set an expense type default, so that every time you add that particular expense type to a transaction, the Payment Type, Billing Type, and Merchant will default to your selections here.
 - a. The Expense Type Defaults override the Payment Type you may have defaulted earlier in step #6.
 - b. You can reach the Merchant field by clicking the Merchant tab. This field is optional.
 - c. This screenshot shows that every time we add the Expense Type of “Auto Mileage – Tier 1” to an expense transaction, the Payment Type will default to “N/A (e.g. Mileage).”