

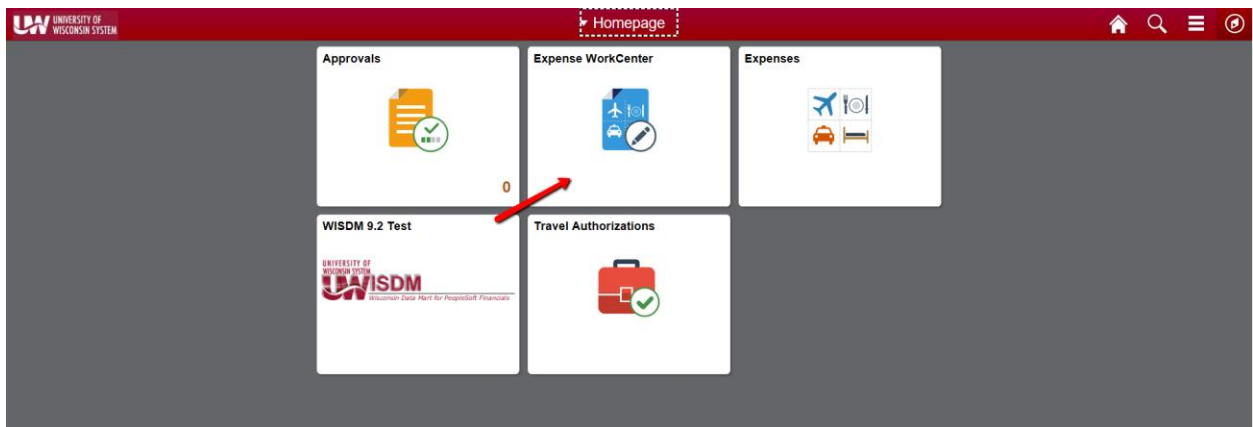
## Assigning User Defaults

To update employee profiles, use the Update Profile component.

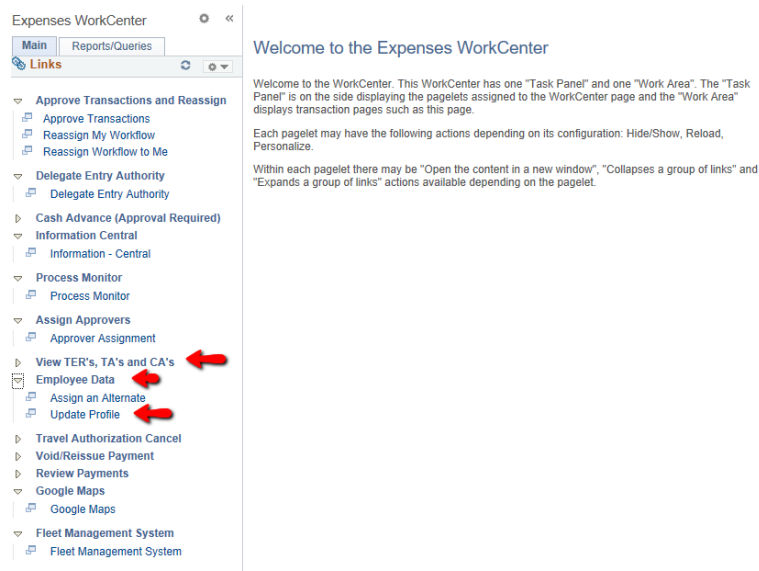
When you access the Employee Profile - Employee Data page using the Travel and Expenses navigation, you can edit personal information about an employee. However, subsequent updates from human resources may overwrite your manual changes

This example illustrates the fields and controls on the Employee Profile - Employee Data page.

1. Click the **Expense WorkCenter**



2. Scroll down and expand **Employee Data**
3. Click the **Update Profile** menu.



This example illustrates the fields and controls on the Employee Profile – Employee Data tab

Employee Data | Organizational Data | User Defaults | Bank Accounts | Corporate Card Information | Transportation Information

**SHARON SCHWARTZ** Employee ID: 00798767

**Employee Information**

\*Last Name: SCHWARTZ Suffix: \*First Name: SHARON Middle: A  
 Telephone: Employee Base:  Home  Office  
 \*Personnel Status: Employee Payments Sent To:  Home Address  Mailing Address

**Phone Number**

*Phone Type	*International Prefix	*Phone	Extension	Description
1				

**Home Address**

Country: USA United States  
 Address 1: Address 2: Address 3:  
 City: County: Postal: State:

**Mailing Address**

Country: USA United States  
 Address 1: 780 REGENT ST Address 2: 780 REGENT ST Address 3:  
 City: MADISON County: DANE Postal: 53715-2635 State: WI Wisconsin

Save Return to Search Previous in List Next in List Notify Add

Employee Data | Organizational Data | User Defaults | Bank Accounts | Corporate Card Information | Transportation Information

This example illustrates the fields and controls on the Employee Profile - Organizational Data tab

Employee Data | **Organizational Data** | User Defaults | Bank Accounts | Corporate Card Information | Transportation Information

SHARON SCHWARTZ

Expenses Processing Data Find | View All | First 1 of 2 Last

Valid for Expenses Yes  
 Reason for Status Passed All Validation Edits

Default Profile  
 Ignore Authorized Amounts  
 Ignore Group Location Amounts  
 Per Diem Amount Type Active Amounts

HR Information		Supervisor Information	
Employee Status	Active	*ID	00759797
Hire Date	04/28/2014 0 (HRS)	Name	NEWNAME,NICOLA J
*GL Unit	UWSYS UW Systemwide	Designated Approver	
*Department	400900 Shared Financial System		
Hours Per Period	<input checked="" type="checkbox"/> Use Business Unit Default		

Default ChartField Values Personalize | Find | First 1 of 2 Last

*GL Unit	Fund	Program	Class	Project	Affiliate	Dept
UWSYS	136	1				400900

Cash Advance Level

Business Unit 100,000.00 USD  
 Specific Amount  
 None

Expense Role

"If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company."

Expense Processing Role EMP Regular Employee-SHARE

Save | Return to Search | Previous in List | Next in List | Notify | Add

Employee Data | Organizational Data | **User Defaults** | Bank Accounts | Corporate Card Information | Transportation Information

## Understanding User Defaults

You can set up user defaults to minimize the amount of data entry on travel authorizations, cash advances or expense reports.

Employee Data | Organizational Data | **User Defaults** | Bank Accounts | Corporate Card Information | Transportation Information

SHARON SCHWARTZ

**Default Creation Method**

\*Expense Report

\*Time Report

\*Travel Authorization

**Expense Defaults**

Report Description

Business Purpose

Originating Location

Expense Location

Transportation ID  STDR

Accounting Detail Default View

Per Diem Range

Billing Type

Payment Type  Personal Funds

Credit Card

Number of Nights

**Expense Type Defaults** Personalize | Find | First 1 of 1 Last

Expense Type	Merchant	Payment Type	Billing Type
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

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

**Time Defaults**

Country

State

Locality

Billing Type

Select Project ChartFields Display :

Default : Codes

Descriptions

Codes

**Project Defaults for Time** Personalize | Find | View All | First 1 of 1 Last

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