

# Changing your user default in your user profile

## Problem

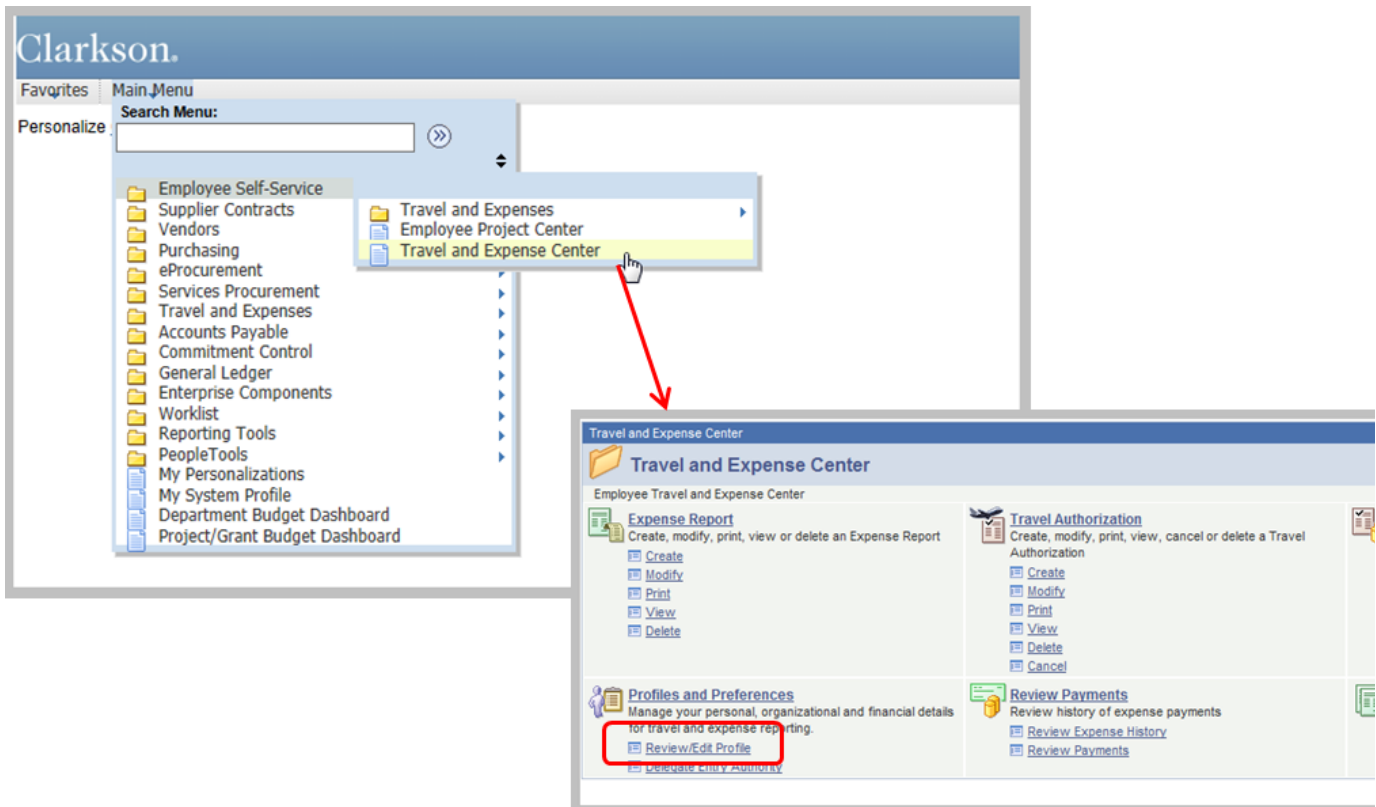
PeopleSoft allows you to set default values for many fields on your transactions, including:

- Report Description
- Business Purpose
- Expense Location
- Billing Type
- Payment Type
- Number of Nights (Lodging)
- Options for specific Expense Types

Please note that not all defaults need to be set. You can choose to set some defaults and not others.

## Solution

1. To navigate to the User Defaults settings see the screen shot below:



2. Click on the User Defaults tab.

**Erin Towne**

**Default Creation Method**

\*Expense Report:

\*Time Report:

\*Travel Authorization:

**Expense Defaults**

Entry Method:  Per Diem Range:

Report Description:  Billing Type:

Business Purpose:  Payment Type:

Originating Location:  Credit Card:

Expense Location:  Number of Nights:

3. See below for a table of what each field does and your options.

Field	Description
Expense Report option	<p>Choose between:</p> <ul style="list-style-type: none"> <li>• Open a Blank Report – this opens your expense report with only those defaults you set here. Everything else has to be manually added. Also, you can update any fields with a default value.</li> <li>• Copy From a Template – this lets you use an Expense Report template (if one exists). You can update any fields from the template, as well as add/delete lines if needed</li> <li>• Copy an Existing Report – this lets you copy from one of your existing expense reports. Like the template option, you can update any fields and add/delete lines</li> <li>• Copy from a Travel <u>Auth</u> – this lets you copy from one of your approved Travel <u>Auths</u>. If you have a One card, do not use this option.</li> </ul>

Field	Description
Travel Authorization options	Choose between: <ul style="list-style-type: none"> <li>• Open a Blank Report – this opens your travel <a href="#">auth</a> with only those defaults you set here. Everything else has to be manually added. Also, you can update any fields with a default value.</li> <li>• Copy From a Template – this lets you use a Travel <a href="#">Auth</a> template (if one exists). You can update any fields from the template, as well as add/delete lines if needed</li> <li>• Copy an Existing Authorization – this lets you copy from one of your existing travel <a href="#">auths</a>. Like the template option, you can update any fields and add/delete lines</li> </ul>
Entry Method option	The system-wide default is Frequent User, so if you like that page style, you do not need to choose it here. If you prefer the Occasional User style, however, you do need to select it here. Try them both to see which you like best.
Report Description	If your transaction descriptions are usually the same, you can enter it here and let it default.
Originating Location	This is not applicable at Clarkson.

Field	Description
Expense Location	If most of your trips are to the same location, then select it here.
Transportation ID	This is not applicable at Clarkson.
Billing Type	If most of your transactions will use a particular Billing Code (Internal or Billable), then select it here.
Payment Type	If most of your travel expenses are paid using one of the existing payment types, select it here. Choice are: <ul style="list-style-type: none"> <li>• Clarkson Visa – Choose this if you have a One Card and use it for most of your expenses.</li> <li>• Employee Paid – these are expenses that you pay yourself, using cash or a personal credit card</li> </ul>

Field	Description
Number of Nights	If most of your trips are for the same number of nights, you can enter it here. This is a field used for Hotel/Lodging charges.
Expense Type Defaults grid	Use this grid to pre-populate fields for your most often used expense report lines. For example, if your Airfare is usually purchased on the Clarkson Visa, is Internal, and usually on Delta, you can create that connection here. When you create the transaction, if you select Airfare as an expense type, those other fields will be populated with your default choices
Project Defaults for Expenses grid	This is not applicable at Clarkson because we will customize the Expenses system to allow the use of <a href="#">SpeedCharts</a> .

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