

How to Set User Defaults

This job aid outlines the steps to set User Defaults for a traveler.

Overview

When setting User Defaults for a Traveler, perform the following steps:

1. Refer to Expense Report Job Aid
2. Process an Expense Report
3. Set User Defaults

Step 1 - Refer to Expense Report Job Aid

- Complete an Expense Report Using the How to Create an Expense Report Job Aid
- You may also be setting User Defaults through a T-Auth – See How to Create a Travel Authorization to create a T-Auth



Something to Think About

You must set User Defaults for each of your travelers.

Step 1 - Refer to Expense Report Job Aid

How to Create an Expense Report (Copy from a T-Auth)

This job aid outlines the steps to create and enter an Expense Report copying from a T-Auth.

Overview

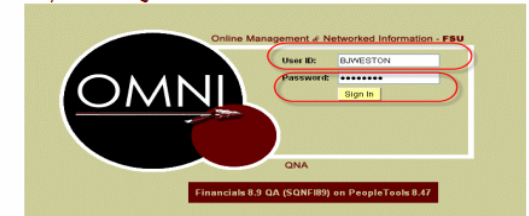
When entering an Expense Report, perform the following steps:

1. Log In
2. Create an Expense Report
3. Copy from a Travel Authorization
4. Accounting Defaults
5. Enter Additional Expense Details
6. Submit the Expense Report

Step 1 - Log In

- Enter User ID
 - Enter Password
 - Click Sign In Button
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- Open Omni Financials

Step 1 - Log In



[Picture Coming Soon]



Step 2 - Process an Expense Report

- After following the steps in the Expense Report Job Aid, your screen should look similar to this

Create Expense Report

Expense Report Entry

John Netter

[User Defaults](#)

Report ID: NEXT

General Information	
*Description:	Conference in New York, NY
*Business Purpose:	Conference or Convention
Default Location:	TALLAHASSEE FL
Comment:	Flight was delayed and he landed one hour after the plane was scheduled to
Reference:	43662
Departure Date	10/02/2006
Return Date	10/06/2006
Depart Time (am/pm)	9:30AM
Return Time (am/pm)	11:00PM
Accounting Defaults Apply Cash Advance(s) More Options: <input type="text"/> <input type="button" value="GO"/>	

Details Customize | Find | 1-7 of 7

Select	*Expense Type	*Expense Date	*Amount Spent	*Currency	*Payment Type	*Billing Type	
<input type="checkbox"/>	Air Travel	10/02/2006	500.00	USD	Paid by Traveler	Out-Stat	*Detail +..
<input type="checkbox"/>	Travel Agency Service Fees	10/02/2006	25.00	USD	Paid by Traveler	Out-Stat	*Detail +..
<input type="checkbox"/>	Breakfast, Domestic	10/03/2006	18.00	USD	Paid by Traveler	Out-Stat	*Detail +..
<input type="checkbox"/>	Lunch, Domestic	10/02/2006	44.00	USD	Paid by Traveler	Out-Stat	*Detail +..
<input type="checkbox"/>	Dinner, Domestic	10/02/2006	76.00	USD	Paid by Traveler	Out-Stat	*Detail +..
<input type="checkbox"/>	Per Diem	10/06/2006	80.00	USD	Paid by Traveler	Out-Stat	*Detail +..
<input type="checkbox"/>	Map Mileage after 6/30/2006	10/02/2006	56.96	USD	Paid by Traveler	Out-Stat	*Detail +..

Totals					
Employee Expenses:	799.96	USD	Due Employee:	799.96	USD
Non-Reimbursable Expenses:	0.00	USD	Due Vendor:	0.00	USD
Prepaid Expenses:	0.00	USD			
Employee Credits:	0.00	USD			
Vendor Credits:	0.00	USD			
Cash Advances Applied:	0.00	USD			

[Definition of Totals](#)

Step 3 - Set User Defaults

- Click the User Defaults hyperlink (see arrow)

Create Expense Report

Expense Report Entry

John Netter [User Defaults](#) Report ID: NEXT

General Information

*Description:	<input type="text" value="Conference in New York, NY"/>	Comment:	<input type="text" value="Flight was delayed and he landed one hour after the plane was scheduled to"/>
*Business Purpose:	<input type="text" value="Conference or Convention"/>	Reference:	<input type="text" value="43662"/>
Default Location:	<input type="text" value="TALLAHASSEE FL"/>	Departure Date	<input type="text" value="10/02/2006"/> <input type="text" value="31"/>
		Depart Time (am/pm)	<input type="text" value="9:30am"/>
		Return Date	<input type="text" value="10/06/2006"/> <input type="text" value="31"/>
		Return Time (am/pm)	<input type="text" value="11:00pm"/>

- The User Defaults page will pop up in a new window



Something to Think About

Make sure to turn off your pop-up blocker



- Enter Expense Defaults for the traveler
 - Select Occasional User (See item 1)
 - Enter CSH for Payment Type (See item 2)
 - Select In-State Travel for Billing Type unless the traveler usually travels out-of-state (See item 3)
- Click Save (See item 4)

Employee Data | Organizational Data | **User Defaults**

John Netter

Default Creation Method

<p>Online</p> <p>*Expense Report: Open a Blank Report</p> <p>*Time Report: Open a Blank Report</p> <p>*Travel Authorization: Open a Blank Authorization</p>	<p>Mobile - Laptop</p> <p>Expense Report: Open a Blank Report</p> <p>Time Report: Open a Blank Report</p>
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Expense Defaults

1 **Entry Method:** Occasional User

Report Description:

Business Purpose:

Originating Location:

2 **Payment Type:** CSH Paid by Traveler

Transportation ID:

3 **Per Diem Range:**

Billing Type: In-State Travel

Expense Location:

Credit Card:

Number of Nights:

Expense Type Defaults

Expense Type: Merchant

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

Project Defaults for Expenses

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

Enabled	PC Business Unit	Project	Activity	Source Type	Category	Subcategory	Description	Description	Time Quantity
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4 **Save** | Return to Search