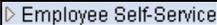
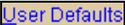




## Setting up User Preferences

1.	<p>From the main menu, click the <b>Employee Self-Service</b> link.</p> <p></p>
2.	<p>Click the <b>Travel and Expenses</b> link.</p> <p></p>
3.	<p>Click the <b>Review/Edit Profile</b> link.</p> <p></p>
4.	<p>The Employee Profile page will open.</p> <p>Entering information specific to each individual traveler will save time and data entry efforts by populating portions of the Expense Report by default. It may be changed if necessary when the Expense Report is created.</p> <p>Click the <b>User Defaults</b> tab.</p> <p></p>
5.	<p><b><u>Default Creation Method</u></b></p> <p>The Online section under this title, the Expense Report, Time Report, and Travel Authorization should be set to "Open a Blank" (report or authorization). The Mobile - Laptop section will also be set to "Open a Blank Report."</p> <p><b><u>Expense Defaults</u></b></p> <p>Click the <b>Entry Method</b> list.</p> <p>Select <b>Occasional User</b>.</p> <p></p>
6.	<p>Click the <b>Report Description</b> field.</p> <p>The Report Description field is not currently used and should be left blank.</p> <p></p>
7.	<p>Click the <b>Business Purpose</b> list.</p> <p>Select <b>Business - In State</b></p> <p></p>



<p>8.</p>	<p>Click the <b>Originating Location</b> list.</p> <p>The Originating Location field should identify the location from where the traveler <i>typically</i> begins a trip. Locations in Travel and Expenses are organized by zip code.</p> <p>Click the Look Up (magnifying glass) icon to select the Originating Location.</p> 
<p>9.</p>	<p>Click the down arrow in the <b>Search By</b> field.</p> <p>The search criteria options are Description (search by city name) or Originating Location (search by zip code).</p> <p>Select either Description or Originating Location, enter the city or zip code, and click the Look Up button.</p> 
<p>10.</p>	<p>Using the Advanced Lookup is another option.</p> <p>Click the <b>Advanced Lookup</b> link.</p> 
<p>11.</p>	<p>The Advanced Lookup offers the same criteria options as the Basic Lookup, but additionally provides operators to allow searching with less specific information.</p> <p>Click the down arrow in the <b>Description</b> field.</p> 
<p>12.</p>	<p>Select <b>Contains</b> as the operator for the Description search option.</p> <p>Enter the <i>city name</i> in the <b>Description</b> field.</p> <p>For demonstration, enter a valid value e.g. "<b>Danville</b>".</p>
<p>13.</p>	<p>Click the <b>Look Up</b> button.</p> 
<p>14.</p>	<p>To select a location from the list of search results, click either the zip code link in the <b>Originating Location</b> column, or the city/state in the <b>Description</b> column.</p> 
<p>15.</p>	<p>Click in the <b>Payment Type</b> field.</p> <p>The Payment Type field is not currently used and should be left blank.</p> 
<p>16.</p>	<p>Click in the <b>Transportation ID</b> field.</p> <p>The Transportation ID field is not currently used and should be left blank.</p> 



17.	<p>Click the <b>Per Diem Range</b> field.</p> <p>The Per Diem Range field is not currently used and should be left blank.</p> <input data-bbox="370 464 537 499" type="text"/>
18.	<p>Click the <b>Billing Type</b> field.</p> <p>The Billing Type field is not currently used (as a default) and should be left blank.</p> <input data-bbox="370 615 521 651" type="text"/>
19.	<p>The <b>Expense Location</b> field is <i>optional</i> and may be left blank, or used to identify a default destination. Use of this default would only be helpful if consistently traveling to the same place.</p> <p>If using this option, click the Look Up (magnifying glass) icon to search for the location needed.</p> <p>Click in the <b>Expense Location</b> field.</p> <input data-bbox="370 934 521 970" type="text"/>
20.	<p>The Number of Nights field is not currently used and should be left blank.</p> <p>Click in the <b>Number of Nights</b> field.</p> <input data-bbox="370 1052 548 1087" type="text"/>
21.	<p>Expense Types define the specific types of costs associated with travel. Each one must be linked to a Payment Type and Billing Type.</p> <p>Click the down arrow in the <b>Expense Type</b> field to view the list of choices.</p> <input data-bbox="370 1236 776 1272" type="text"/>
22.	<p>Click the <b>Expense Type</b> list.</p> <p>Select <b>Airfare</b>.</p> <input data-bbox="370 1388 776 1423" type="text"/>
23.	<p>Click the <b>Payment Type</b> list.</p> <p>Select <b>Prepaid</b>.</p> <input data-bbox="370 1539 691 1575" type="text"/>
24.	<p>Click the <b>Billing Type</b> list.</p> <p>Select <b>Prepaid</b>.</p> <input data-bbox="370 1694 691 1730" type="text"/>
25.	<p>Click the <b>Add a Row</b> ("+") to add additional rows.</p> <input data-bbox="370 1774 412 1810" type="button"/>
26.	<p>Enter <b>9</b> as the number of rows to be added.</p>



27.	Complete the Expense Type Defaults by selecting the 9 remaining Expense Types, associated Payment Types and Billing Types.
28.	<p>Click the <b>Enabled</b> checkbox option.</p> <p><b>***IMPORTANT***</b></p> <p>The Project Defaults for Expenses section should only be enabled/completed if your agency uses Projects information in the chartfield string for travel reimbursements. If not, these fields should be left blank.</p> <input data-bbox="370 611 407 646" type="checkbox"/>
29.	<p>Enter the Business Unit into the <b>PC Business Unit</b> field.</p> <p>For demonstration, enter valid value e.g. "<b>00500</b>" or your business unit.</p>
30.	<p>Click in the <b>Project</b> field.</p> <p>The Project field should be left blank unless only one project is ever used, or there's one project used the majority of the time.</p> <input data-bbox="370 940 521 976" type="text"/>
31.	<p>Click in the <b>Activity</b> field.</p> <p>If a Project was entered, select the Activity.</p> <input data-bbox="370 1094 532 1129" type="text"/>
32.	<p>Click in the <b>Source Type</b> field.</p> <p>If a Source Type is applicable with the Project, select it. If not, leave the field blank.</p> <input data-bbox="370 1247 467 1283" type="text"/>
33.	<p>Click in the <b>Category</b> field.</p> <p>If a Category is applicable with the Project, select it. If not, leave the field blank.</p> <input data-bbox="370 1400 467 1436" type="text"/>
34.	<p>Click in the <b>Subcategory</b> field.</p> <p>If a Subcategory is applicable with the Project, select it. If not, leave the field blank.</p> <input data-bbox="370 1554 451 1589" type="text"/>
35.	Scroll to the right to view the rest of the page (if necessary).
36.	Enter <b>100</b> into the <b>Percentage</b> field.



37.	<p><b>***OPTIONAL***</b></p> <p>If necessary, multiple lines may be added using the Add a Row button to define more than one distribution. The total of all Percentages entered, though, must equal 100%.</p> <p>Click the <b>Add multiple new rows at row 1 (Alt+7)</b> button to add more Project Default lines. Repeat the previous steps to enter the Project information.</p> 
38.	<p>Click the <b>Save</b> button at the bottom of the page.</p> 
39.	<p>Entering User Defaults is complete.</p> <p>Click the <b>Home</b> link at the top of the page.</p> 
40.	<p><b>End of Procedure.</b></p>