Business Process Overview

You can define voucher defaults that automatically populate voucher fields for an entire session, and you can override those defaults for a particular voucher. To set up voucher defaults, you can:

- Predefine session defaults using the Session Defaults page. The system saves these defaults that you can apply to vouchers that you enter using the Voucher component or the Quick Invoice Entry component. You define session defaults for all users, for users with the same primary permission list, or for specific users.

- Define ad hoc session defaults using the Session Defaults page within the Voucher and Quick Invoice Entry components. The system does not save the defaults and only applies them during the current session.

<table>
<thead>
<tr>
<th>Process Frequency</th>
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<tbody>
<tr>
<td>Dependencies</td>
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<tr>
<td>Assumptions</td>
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<tr>
<td>Responsible Parties</td>
<td>None</td>
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<tr>
<td>Alternate Scenarios</td>
<td>None</td>
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</tbody>
</table>

Process Detail

I. Ad Hoc - Session Defaults Process Steps

   Navigation: Accounts Payables > Vouchers > Add/Update > Regular Entry or Quick Invoice Entry

   1. Open a Voucher Invoice Information tab
2. **Click** *Sessions Defaults* hyperlink.

3. **Enter** Business *Unit*: ‘UWADM’
4. **Enter** Distribution funding values.

5. **Click** [Ad Hoc] to save

6. **Click** on Return to Main Page hyperlink to get Back to Voucher Regular Entry page

7. **Click** on Return to Main Page hyperlink to get Back to Voucher Regular Entry page

8. To change the Voucher Session Ad Hoc Default values simply **Go** back to any Voucher tab

9. **Click** Session Defaults hyperlink and repeat steps 2 and 3 above.

10. **Click** [Clear] will remove all values from the Ad Hoc Sessions Default page.

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### Add - Session Defaults Process Steps

**Navigation:** Set Up Financials/Supply Chain > Product Related > Procurement Options > Vouchers > Session Defaults

You can create session defaults for ‘All Users’, ‘Primary Permission List’ (user roles), or a specific ‘User ID’. On **Add a New Value**, when you **select** ‘Primary Permission List’ as the Session Default Type, you need to **specify** a Primary Permission List. When you **select** ‘User ID’, you need to **specify** a User ID. Since this functionality has global implications in that all Available permanent Session Defaults are updateable by everyone who has the appropriate security, the use of this functionality must be judicious. This functionality is NEW to 9.1 so the utilization and deployment will need to be reviewed as users get familiar with the added feature.

**Add a new Session Default for a User ID**

Available only for a specific User ID as identified in the User ID field

1. **Select** Session Default Type: ‘User ID’

2. **Enter** a User ID: This User ID will have exclusive use of this Session Default.

3. **Enter** a Name: This name is the Tag or unique Identifier to this Session Default.

4. **Click** [Add] to reserve the Session Default name and get to the Session Defaults page.
5. **Enter** Session Default Values

6. **Click** ![Save](Save)
III. Find an Existing - Session Defaults Process Steps

1. To view all Session Defaults currently established, click without any criteria or if looking for a specific Session Default, enter desired search criteria values and click . This will open the Session Defaults page.
2. Enter changes to the Session Defaults as needed.
3. Click .

Revision History

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<tr>
<th>Author</th>
<th>Version</th>
<th>Date</th>
<th>Description of Change</th>
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<tr>
<td>Mark Flemington</td>
<td>1.0</td>
<td>01/01/2012</td>
<td>Initial Draft</td>
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<td>Jim Backus</td>
<td>1.1</td>
<td>05/06/2013</td>
<td>9.1 Updates</td>
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<td>Susan Kincanon</td>
<td>1.2</td>
<td>05/28/2013</td>
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