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I. 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.

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<tbody>
<tr>
<td>Dependencies</td>
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<td>Assumptions</td>
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<td>Responsible Parties</td>
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<td>Alternate Scenarios</td>
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Process Detail

Ad Hoc - Session Defaults Process Steps

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

1. **Open** a Voucher tab

SFS_AP.2.08_Voucher_Session_Defaults
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. The Voucher Session Ad Hoc Defaults will now be used when creating any New Vouchers.

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

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.

**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**
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>
<td>Final review and publish to website</td>
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<tr>
<td>Dawn White</td>
<td>2.0</td>
<td>5/18/2018</td>
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