

## How to Change Default Funding (Traveler Role)

Travelers can change their Default Funding in their Expense Module profile, which can significantly minimize expense entry time as this will be the new default funding in every Expense Report/Travel Authorization. Funding can still be changed on an individual report if required.

Below are the steps outlining this process.

1. Sign into the Expense Module. Click on **Travel and Expenses** in the main menu on the left.
2. Click on **UW Travel and Expenses** then **My Default Profile**

System

Favorites | Main Menu > Travel and Expenses > UW Travel and Expenses > My Default Profile

### My Default Profile

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Empl ID: begins with

Name: begins with

Search Clear Basic Search Save Search Criteria

3. Click View All in the upper right corner

Favorites | Main Menu > Travel and Expenses > UW Travel and Expenses > My Default Profile

### UW Travel and Expenses

#### My Default Profile

SCHWARTZ, SHARON

EMPLOYMENT Find | View All | First 1 of 2 | Last

Empl ID 00798767 IS BUS AUTO SPEC Begin Date 04/28/2014 End Date

Eff Date	Status	Business Unit	Dept	Dept Name	Supervisor ID	Name	Make Default	Base profile/ Selected Profile/
1 07/01/2016	A	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default	Base profile/ Selected Profile/
2 02/01/2016	A	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default	
3 09/21/2015	A	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default	
4 07/13/2015	A	UWSYS	400900	Shared Financial System			Make Default	No supv defined

Personalize | Find | View All | First 4.4 of 11 | Last

Default Profile	Valid?	Reason	Payment Method	Hold Payment?	Adv Level	Business Unit	Dept	Dept Name	Fund	Program	Project
1 <input type="checkbox"/>	Yes	Passed	ACH	<input type="checkbox"/>	None	UWSYS	400900	Shared Financial System	136	1	

4. Scroll down to the Default Travel Profile

UW Travel and Expenses

My Default Profile

SCHWARTZ, SHARON

**EMPLOYMENT** Find | View 1 First 1-2 of 2 Last

Empl ID 00798767 IS BUS AUTO SPEC Begin Date 04/28/2014 End Date

**JOB** Personalize | Find | View All | First 1-4 of 11 Last

Eff Date	Status	Business Unit	Dept	Dept Name	Supervisor ID	Name	Make Default
1 07/01/2016	A	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default
2 02/01/2016	A	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default
3 09/21/2015	A	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default
4 07/13/2015	A	UWSYS	400900	Shared Financial System			Make Default

Default Profile	Valid?	Reason	Payment Method	Hold Payment?	Adv Level	Business Unit	Dept	Dept Name	Fund	Program	Project
1	<input type="checkbox"/>	Yes	Passed	ACH	<input type="checkbox"/>	None	UWSYS	400900	Shared Financial System	136	1

Empl ID 00798767 **Default Travel Profile** Begin Date 04/28/2014 End Date

**JOB** Personalize | Find | View All | First 1-2 of 2 Last

Eff Date	Status	Business Unit	Dept	Dept Name	Supervisor ID	Name	Make Default
1 12/31/2099	I	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default
2 04/28/2014	A	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default

Default Profile	Lock?	Valid?	Reason	Payment Method	Hold Payment?	Adv Level	Business Unit	Dept	Dept Name	Fund	Program	Project
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes	Passed	ACH	<input type="checkbox"/>	None	UWSYS	400900	Shared Financial System	136	1

- Select the "Lock?" box and change to the funding you want to Lock Down.

UW Travel and Expenses

My Default Profile

SCHWARTZ, SHARON

**EMPLOYMENT** Find | View 1 First 1-2 of 2 Last

Empl ID 00798767 IS BUS AUTO SPEC Begin Date 04/28/2014 End Date

**JOB** Personalize | Find | View All | First 1-4 of 11 Last

Eff Date	Status	Business Unit	Dept	Dept Name	Supervisor ID	Name	Make Default
1 07/01/2016	A	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default
2 02/01/2016	A	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default
3 09/21/2015	A	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default
4 07/13/2015	A	UWSYS	400900	Shared Financial System			Make Default

Default Profile	Valid?	Reason	Payment Method	Hold Payment?	Adv Level	Business Unit	Dept	Dept Name	Fund	Program	Project
1	<input type="checkbox"/>	Yes	Passed	ACH	<input type="checkbox"/>	None	UWSYS	400900	Shared Financial System	136	1

Empl ID 00798767 **Default Travel Profile** Begin Date 04/28/2014 End Date

**JOB** Personalize | Find | View All | First 1-2 of 2 Last

Eff Date	Status	Business Unit	Dept	Dept Name	Supervisor ID	Name	Make Default
1 12/31/2099	I	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default
2 04/28/2014	A	UWSYS	400900	Shared Financial System	00759797	BURTON, NICOLA	Make Default

Default Profile	Lock?	Valid?	Reason	Payment Method	Hold Payment?	Adv Level	Business Unit	Dept	Dept Name	Fund	Program	Project
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes	Passed	ACH	<input type="checkbox"/>	None	UWSYS	400900	Shared Financial System	136	1

- Click Save