# How to Review/Edit Profile Information in the Expense Module (Traveler Role)

Travelers can view specific information about their Expense Module profile, such as their mailing address, default funding and My Corporate Card information. They also have the ability to modify their user defaults which can significantly minimize expense entry time. Below are steps outlining each of the areas that can be reviewed/edited.

1. Sign into the Expense Module. Click on **Expenses Tile** from the Homepage.
2. Click the **Create Expense Report Tile**.
3. Choose the **drop down arrow** next to your name and then choose **User Defaults**.
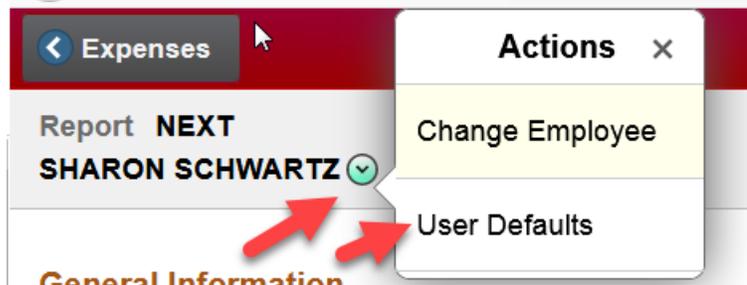
Tab #1: Employee Data

If an employee is paid via paper check, he/she can determine the mailing address from the *Employee Data* tab. The address is pulled from HR data and cannot be modified by the Expense Module Administrators.

Note: *The Home Address fields are not included in the data pulled from HRS.*

Tab #2: Organizational Data

The information on the *Organizational Data* tab is used by System Administrators to determine user accessibility. Travelers can view the default funding that will populate their expense reports in the *Default Chart Field Values* box. This information will not reflect any manual changes made by System Administrators to the traveler's default profile.

Tab #3: User Defaults

Travelers can minimize entry time by customizing the expense line fields in the User Defaults tab to correspond with their typical travel circumstances. For example, if you only travel outside the state of Wisconsin, you may want to default your Billing Type to *Out-of-State*. Or, if you always pay for airfare on your department Purchasing Travel Card, you may want to default the *Airfare and Other Related Fees* expense type to *University Prepaid*. If a default is set, travelers/alternates will still be able to edit the pre-populated fields when creating new reports. There are three areas on the *User Defaults* tab that can be customized by the traveler. Each of these is outlined below.

Note: *When an alternate creates on behalf of an employee, the defaults used are derived from the employee's profile, not the alternate's.*

Default Creation Method

- **Expense Report** and **Travel Authorization:** When creating a new expense report or travel authorization, travelers can choose to default to one of the following:
    - Copy from a Template
    - Copy from a (Existing) Travel Authorization
    - Copy from an Existing Report *(For Expense Reports only)*
    - Open a Blank Report/Authorization

    Select the desired expense report or travel authorization creation method and click the **Save** button at the bottom of the page.

Expense Defaults

- **Entry Method:** Currently, all user profiles are defaulted to *Occasional User* and all training resources are captured using this entry method. Travelers may opt to change their entry method to *Frequent User*; however, they should be aware that this will change the look and feel of e-Reimbursement.
- **Report Description:** This field is equivalent to the *Report Name* field in the *General Information* box of an expense report. The report name should be unique to each report; however, if a standard naming convention is used, it may be helpful to enter the criteria in this field.
- **Business Purpose:** If a traveler consistently conducts the same type of business, a default can be chosen.
- **Originating Location:** This field is only used when claiming mileage or relocation expenses. If the traveler always departs from a specific location, it may be helpful to default to this location.
- **Payment Type:** If the traveler consistently uses the same payment method, one of the following could be selected as the default:
    - **Personal Funds:** Reimbursable expenses are paid directly to the Traveler.

- o **University Prepaid:** Expenses have already been paid by the university with another payment method (e.g. Purchasing Card) and will not be included in the amount reimbursable to the claimant.
  - o **Corporate Card:** Reimbursable expenses paid directly to US Bank, by the University, on behalf of the cardholder.

- **Transportation ID:** Mileage reimbursement rates vary depending on the circumstances. Travelers may choose to establish a default rate.
- **Per Diem Range:** This field is not used in e-Reimbursement.
- **Billing Type:** If the traveler consistently uses the same billing type, use the following criteria to determine what to select as a default:
  - o **In-state:** expenses incurred within the claimant's headquarter state or as part of a trip within the traveler's headquarters

    state
  - o **Out-of-state:** expenses incurred outside the claimant's headquarter state or as part of a trip outside of the traveler's headquarter state
  - o **Foreign:** expenses incurred outside of the claimant's headquarter country or as part of a trip outside the traveler's headquarter country
- **Expense Location:** This field populates *Destination* field in the General Information box of an expense report. If the traveler consistently goes to the same place, it may be helpful to default to this location.
- **Credit Card:** If the traveler has a My Corporate Card, the Expense Module should automatically default to the most current card.
- **Number of Nights:** This field is only used when claiming lodging expenses.

Expense Type Defaults

Travelers may establish defaults that are specific to each expense type. For instance, if you always pay for airfare on a department Purchasing Travel Card, you may want to default the *Airfare and Other Related Fees* expense type to *University Prepaid* and/or *Out-of-State*. Select an Expense Type from the drop-down menu and choose the appropriate Payment Type and Billing Type. To add or remove a line, click the plus or minus sign ➕ ➖ at the end of the row.

Note: Expense Type Defaults will override any settings in the Expense Defaults section above.

Expense Type Defaults		Customize	Find	First ◄ 1-4 of 4 ► Last
Expense Type \ Merchant \ [≡]			
'Expense Type	**Payment Type**	**Billing Type**	
Internet Fee ▼	Corporate Card ▼	Out-of-State ▼	➕ ➖
Lodging-Individual ▼	University Prepaid ▼	Out-of-State ▼	➕ ➖
Meals-Individual ▼	Corporate Card ▼	Out-of-State ▼	➕ ➖
Misc-Purchases/Supplies ▼	Corporate Card ▼	Out-of-State ▼	➕ ➖

Project Defaults for Expenses

This section of the *User Defaults* menu is deactivated.

Tab #5: Corporate Card Information

If a traveler has been issued a My Corporate Card, he/she may view card information (e.g. expiration date, credit limit, transaction limit) on the *Corporate Card Information* tab.

Note: *For security purposes, the Card Number displayed on this tab does not reflect actual data.*