Updating Your Profile-Level Defaults

General Information

Your profile level defaults flow down into all newly created requests and reports, so you don't have to change your header information.

When you regularly use multiple funding strings, you may choose the one you use the most.

Be aware that these defaults are where Cardholder reports are generated from, and "files" you under a department or COA.

If you move departments, this information needs to be updated manually.

Steps to Update

1. Click on your profile icon in the upper right-hand corner
2. Click on settings
3. Choose either Request Information or Expense Information
    a. They should be the same, but after you change them, be sure to verify that it is populated in the other one correctly.
4. Enter your default department information.
    a. Business Unit is either TCU or Brite
    b. Fund Number (hidden by the right-hand drop-down in the screenshot below)
    c. Department Number – ***Ask an admin or a financial approver for this if you do not know it.*** *The example below is probably not your department number.*
    d. Optional: Project Number
5. Click save.
    a. Verify that in the other setting, it duplicated correctly.