Session Defaults
Session Defaults is a Core-CT 9.1 tool that allows users to quickly populate fields on a group of similar, NON-PO vouchers only. To set up a Session Default, users must go into the voucher component, **Invoice Information** page.

The **Session Defaults** page in the **Regular Entry** component allows users to set values that will be applied to all Non-PO vouchers that they enter while signed in to Core-CT 9.1. These defaults are not saved when users end the session by signing out of Core-CT. Session Defaults will have to be reset for a new session.

Navigation
Accounts Payable > Vouchers > Add/Update > Regular Entry

Click the **Session Defaults** link.

The **Session Defaults** page displays.

Use the Session Default page to set default values for **Vendor Details**, **Invoice Defaults**, and **Distribution**. The **Business Unit** field on the **Sessions Defaults** page should default based on User ID.

Use the **Ad Hoc** button to set defaults for the current session.

Use the **Clear** Button to clear the **Session Defaults** page. Once cleared new defaults can be entered. Several sets of **Session Defaults** can be used within a single session.

To use Session Defaults

- Navigate to the **Session Defaults** Page

- Enter **Default** values
- Click the **Ad Hoc** button
- Click the **Return to Main Page** link

- Click the **Add** button on the **Invoice Information** page
- The **Voucher Add a New Value Page** opens

Voucher

| Find an Existing Value | Add a New Value |

Business Unit: AESM1 🔍
Voucher ID: NEXT
Voucher Style: Regular Voucher ▾
Short Vendor Name: 066001861F-001 🔍
Vendor ID: 0000000002 🔍
Vendor Location: MAIN 🔍
Address Sequence Number: 1 🔍
Invoice Number: 1232456
Invoice Date: 11/21/2012 📅
Gross Invoice Amount: 100
Freight Amount: 0.00
Misc Charge Amount: 0.00
Estimated No. of Invoice Lines: 1

Add

- Enter invoice vendor and invoice information
- Click **Add**
- The **Invoice Information** page displays

- The default values set on the **Session Default** page display on the new voucher
- Complete the voucher and click **Save**.
- Click the **Add** button to add a new voucher with the same set of session defaults
- Follow steps above to continue adding vouchers using the session defaults
- To use a new set of session defaults navigate to the **Session Defaults** page for a new voucher

- Click the **Clear** button. Enter new session defaults
- Click **Ad Hoc.** Click the **Return to Main Page** link
- Click the **Add** button and complete steps to enter a new voucher. The new session defaults will display on the voucher.

Adding Attachments to a Voucher
Core-CT allows users to add attachments to a Voucher on the **Invoice Information** page in the **Regular Entry** component using the **Attachments (0)** link.
The types of files that can be attached include:

- doc & docx
- xls & xlsx
- txt
- pdf
- jpeg

The number in the parentheses () in the **Attachment** link indicates the number of attachments associated with a payment. For example **Attachments (0)** indicates that no files are attached; **Attachments (1)** indicates 1 file is attached.

A word about attaching documents to vouchers…

While there is no ruling on what can or should be uploaded using this hyperlink, agencies should decide on what is necessary. Some helpful hints are:

1. Upload only what would be beneficial to AP users
2. Upload only what is AP-specific. Don't attach PO-related documents. (contracts, contract amendments, etc.) PO has attachment capability also!

3. Watch the size of the file you are uploading – if it's a 500 pg manual with hundreds of pictures, don't do it!
4. Keep the file type within the Microsoft Office Suite.

If you are unsure about attaching a document, Call the HelpDesk for guidance.

To add a pdf from the **Invoice Information** page:
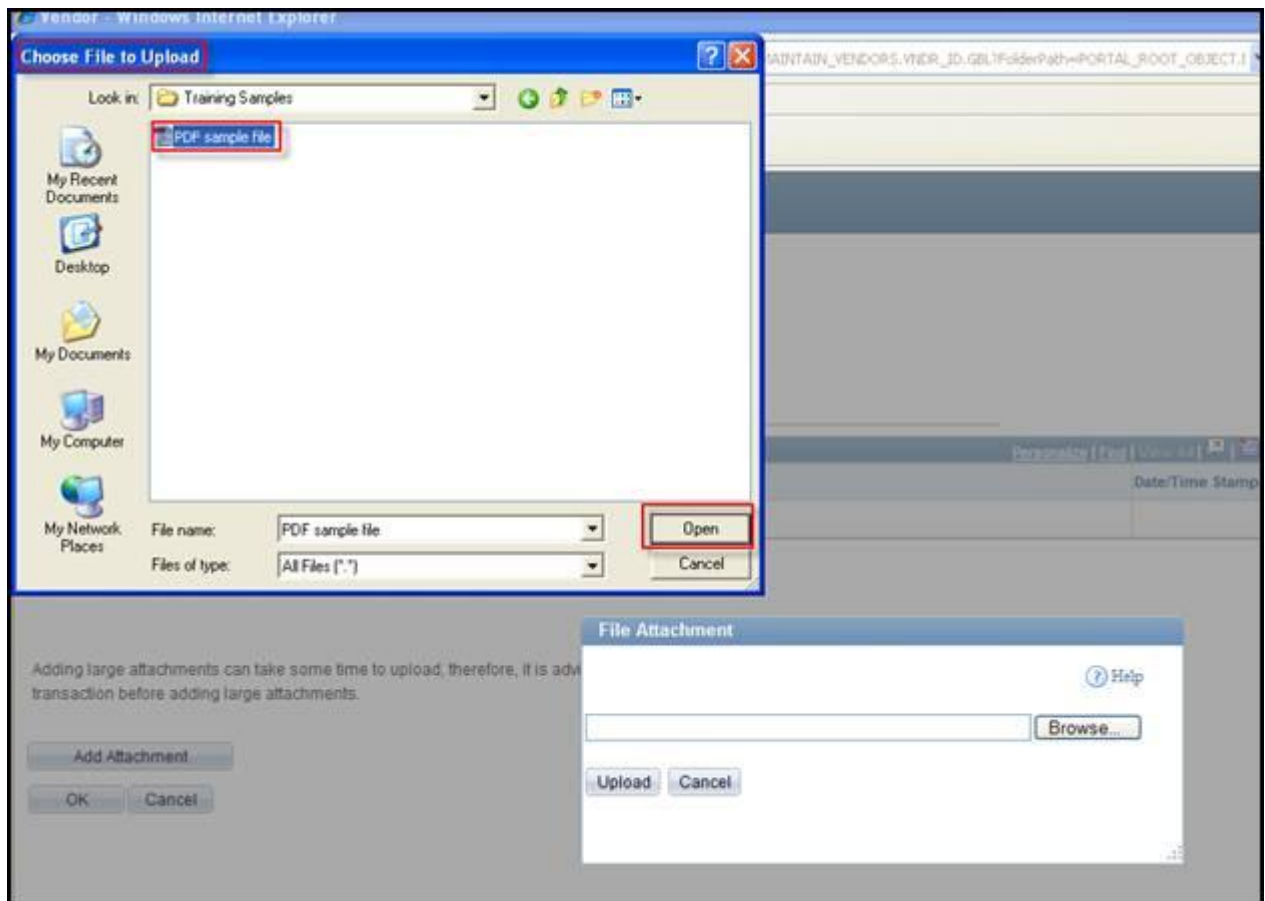
- Click the **Attachments (0)** link.

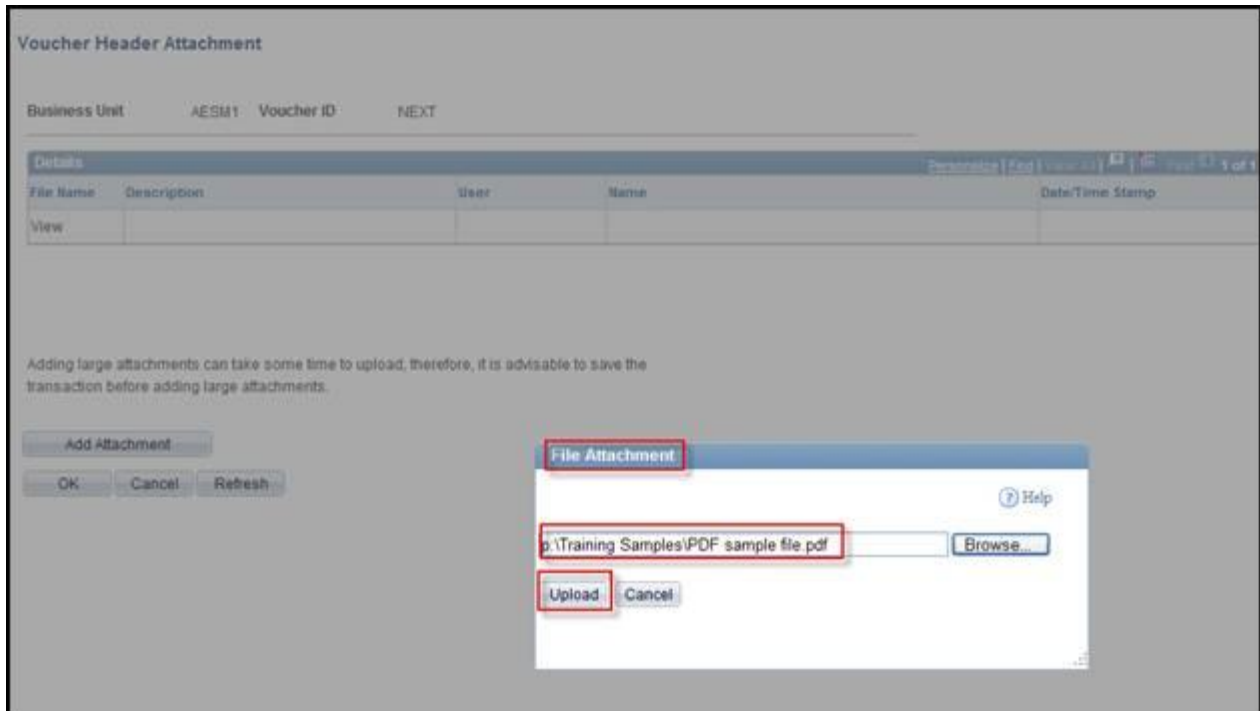- The **Voucher Header Attachment** page displays. Click **Add Attachment**.

- The **File Attachment** dialog box displays. Click the **Browse…** button.
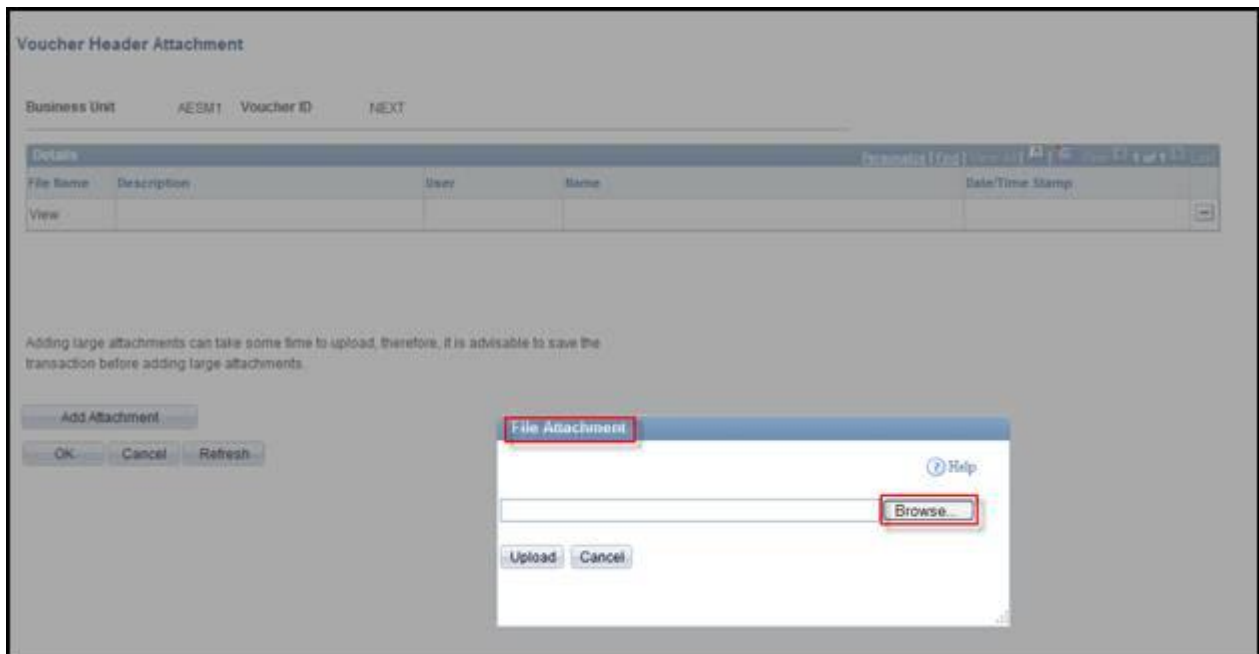
- The **Choose File to Upload** dialog box displays. Select the file to upload. Click **Open**.

- The name of the selected file displays in the **File Attachment** dialog box. Click **Upload** to attach the file.

- The **Vendor Attachments** page displays. The name of the uploaded file displays in the **File Name** field. Enter a brief description of the uploaded file in the **Description** field.

- Use the **Add Attachment** button to add another attachment. Use the **OK** button to return to the **Identifying Information** page and save the attachment. Use the **Cancel** button to return to the **Identifying Information** page without saving the attachment.

- The **Attachments (1)** link now displays (1). This indicates that one attachment has been added to the voucher.

Receipt Dates
The **Receipt Date** field is a required field in Core-CT 9.1. It does not default to the current system date. Users must enter a value in this field in order to save a voucher.

Core-CT issues the following error message if the **Receipt Date** field is not entered upon saving.