

Set Up SACR

User Defaults

Description

The system automatically loads default values into data pages for a particular user ID. The user default settings that you establish in the User Defaults component can be overridden on any page in the system. User defaults (which are optional) can save time and minimize data entry errors.

You need to be familiar with the pages and fields that default settings affect before you specify defaults. This document does not describe the functionality of the particular fields discussed here. Those fields are documented in the relevant process documents.

Note. When you select default values for fields, you can select only those values for which the user ID has security access.

This document discusses how to:

- Set defaults for academic information.
- Set defaults for financial and admissions data.
- Set defaults for admissions application data.
- Set defaults for printing transcripts, award notifications, and Student and Exchange Visitor Information System (SEVIS).
- Set defaults for enrollment overrides.
- Set defaults for communication keys.
- Select the type of communication, checklist, and comment (3C) group access.

Process Steps

Navigation:

Set Up SACR > User Defaults

Step 1: User Defaults 1

There is no search page associated with this component. The User Defaults is shown only for the user that is logged on.

User Defaults 1	User Defaults 2	User Defaults 3	User Defaults 4	Enrollment Override Defaults
User ID: GPATTERSON Name: Crockett, Leeann Rae				
Academic Institution:	<input type="text" value="UMS07"/>		University Maine Presque Isle	
Career Group SetID:	<input type="text" value="UMSYS"/>		University of Maine System	
Facility Group SetID:	<input type="text" value="UMSYS"/>		University of Maine System	
Academic Career:	<input type="text" value="UGRD"/>		Undergraduate	
Academic Group:	<input type="text" value="IBUSI"/>		UMPI Business & Internatl Stud	
Subject Area:	<input type="text" value="BUS"/>		Business	
Term:	<input type="text" value="0710"/>		2006 Fall	
Academic Program:	<input type="text"/>			
Academic Plan:	<input type="text"/>			
Academic Sub-Plan:	<input type="text"/>			
<input type="button" value="Save"/> <input type="button" value="Notify"/>				



- 1.1 Select the default values for fields on this page. You can set default values for some fields but not others. All fields are optional.

Step 2: User Defaults 2

User Defaults 1	User Defaults 2	User Defaults 3	User Defaults 4	Enrollment Override Defaults
User ID: GPATTERSON Name: Crockett, Leeann Rae				
SetID:	<input type="text" value="UMSYS"/>		University of Maine System	
Aid Year:	<input type="text"/>			
Business Unit:	<input type="text" value="UMS07"/>		University Maine Presque Isle	
Application Center:	<input type="text" value="UGRD"/>		UMPI Undergrad Application Ctr	
Recruiting Center:	<input type="text" value="UMPI"/>		UMPI Recruiting Center	
Cashier's Office:	<input type="text"/>			
Department:	<input type="text"/>			
Admit Type:	<input type="text" value="FYR"/>		First-Year Student	
Campus:	<input type="text" value="UMPI"/>		University Maine Presque Isle	
Institution Set:	<input type="text"/>			

- 2.1 Select default values for the fields on this page. You can set default values for some fields but not others. All fields are optional.

Step 3: User Defaults 3

User Defaults 1	User Defaults 2	User Defaults 3	User Defaults 4	Enrollment Override Defaults
User ID: GPATTERSON Name: Crockett, Leeann Rae				
Academic Level: <input type="text" value="First Year"/>				
Application Method: <input type="text" value="Hard Copy"/>				
Last School Attended: <input type="text"/> 				
Graduation Date: <input type="text"/> 				
Housing Interest: <input type="text"/>				
<input type="checkbox"/> Financial Aid Interest				
External Acad Data Defaults				
Transcript Type: <input type="text"/>				
Transcript Rcvd Data Source: <input type="text"/>				
Transcript Rcvd Medium: <input type="text"/>				

Select default values for the fields on this page. You can set default values for some fields but not others. All fields are optional.

- 3.1 **Academic Level:** Select an academic level for the applicant, such as Freshman, Junior, or Not Set.
- 3.2 **Application Method:** Select the medium by which the institution received the student's application, such as *Diskette*, *Hard Copy*, or *Web Appl* (web application).
- 3.3 **Last School Attended:** Enter a value in this field if you receive numerous applications from a particular school. The values depend on the options that have been set up in the system.
- 3.4 **Graduation Date:** Enter a value here if many applicants share the same graduation date. There is no delivered default value for this field.
- 3.5 **Housing Interest:** Select Commuter, Off Campus, or On Campus.
- 3.6 **Financial Aid Interest:** Select to have the Financial Aid Interest indicator set by default in the admissions application information.

External Acad Data Defaults (external academic data defaults)

- 3.7 **Transcript Type:** Select Official or Unofficial for this field to indicate if a transcript is official or unofficial.
- 3.8 **Transcript Rcvd Data Source:** (transcript received data source) Select the data source used to transmit the academic transcript to the institution.
- 3.9 **Transcript Rcvd Medium:** (transcript received medium) Select EDI or Hard Copy to indicate the medium by which the transcript is received at the institution.

Step 4: User Defaults 4

User Defaults 1	User Defaults 2	User Defaults 3	User Defaults 4	Enrollment Override Defaults
User ID: GPATTERSON Name: Crockett, Leeann Rae				
<input checked="" type="checkbox"/> Carry ID				
<hr/>				
Output Destination: <input type="text" value="Page"/>				
Transcript Type: <input type="text"/>				
SEVIS Default				
School Code: <input type="text" value="POM214F00149000"/>				
Program Number: <input type="text" value="P-1-01822"/> University of Maine				
Printer Name: <input type="text"/> Explain				

- 4.1 **Carry ID:** Select to have the system carry the ID of the last entered (or selected) individual or organization from search box to search box and from page to page. If you select the Carry ID option, you do not have to repeatedly enter or select the ID when you modify or review data for an individual or organization.
- 4.2 **Output Destination:** Select the default destination for printing transcripts. Select EDI, Page, or Printer.
- 4.3 **Transcript Type:** Select the default value for the type of transcripts that you generally print. The options depend on which values are set up in the system.
- 4.4 **Printer Name:** List the default PostScript printers that you use to print award notifications. Click the Explain link for more detailed information.

SEVIS Default

- 4.5 **School Code:** Select the default school code that populates fields in the SEVIS F/M Visa components.
- 4.6 **Program Number:** Select the default program sponsor number that populates fields in the SEVIS J Visa components.

Step 5: Enrollment Override Defaults

- 5.1 Select the default overrides for the enrollment access ID shown. Only those overrides to which an enrollment access ID has access can be set as defaults. The overrides selected here are set during the enrollment access ID setup. You can override these settings.

Step 6: Communication Speed Keys

Communication speed keys enable you to create shortcuts for specifying common communication data. Users can select from base default communication keys or modify them. Users can also set up their own communication keys in addition to the base communication keys.

Administrative Function

Set default communication keys for multiple administrative functions by adding a row for each administrative function.

- 6.1 **Academic Institution:** Select the academic institution for the administrative function.

- 6.2 **Administrative Function:** Select the administrative function to which the default communication key is assigned.
- 6.3 **Default Comm Key** (default communication key) Displays the communication key that you select as the default for the administrative function.
- 6.4 **No Default:** If you do not want to specify a default communication key for an administrative function, either select this check box or do not select a default communication key in the Comm Key (communication key) scroll area. The Default Comm Key field remains blank.

Comm Key

You can define only one default communication key for each administrative function. You can set multiple communication keys (or comm keys) by adding rows in the Comm Key scroll area.

- 6.5 **Comm Key** (communication key) Select the comm key that you want to use as a default for the administrative function. After you enter a value in this field, the Category, Context, Method and other comm key values appear.
- 6.6 **Default Comm Key** (default communication key) Select this check box to set this comm key as the default for the administrative function.
- 6.7 **Print Comment:** Select to have the system set the Print Comment flag to True by default for communications using this comm key.
- 6.8 **Activity Completed:** Select to have the system set Activity Completed flag to True by default for communications using this comm key.
- 6.9 **Unsuccessful Outcome:** Select to have the system set the Unsuccessful Outcome flag to True by default for communications using this comm key.

Step 7: User 3C Groups Summary

User Defaults 3		User Defaults 4		Enrollment Override Defaults		Communication Speed Keys		User 3C Groups Summary	
User ID:	GPATTERSON			Name:	Crockett, Leeann Rae				
Operator Group Summary									
Institution	Description	Inquiry Indicator		Update Indicator					
University of Maine Fort Kent	UMFK Admissions	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>					
University Maine Presque Isle	UMPI Admissions	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>					
University Maine Presque Isle	UMPI Admissions Leaders	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>					

You can see only those items associated with the 3C groups to which you have access, as indicated by the selected check boxes. You can temporarily disable access to specific 3C groups that you do not want to view each time. Clear the Inquiry Indicator check box for those groups that you do not want to include in the default. The Update Indicator check box appears if the user can enter and edit data in the 3C group. Users cannot change update access on this page.

Source Documents

N/A

Security Roles

Maintained by: Everyone

Viewable by: N/A

APPROVED and TESTED by Admissions and Campus Community Team on February 14, 2006.