Setting Your User Defaults

Description
User Defaults are a time-saver. You can set standard values for certain data fields in your User Defaults. Then when you go to a PeopleSoft page, those values will be automatically entered for you. Certain User Defaults provide more—setting them enables processing to occur that otherwise would not happen. So it is important to set at least some of your User Defaults. This Guide shows you how.

For more detailed coverage of this subject, see the Business Process: **CC053 User Defaults**.

Navigation
Set Up SACR > User Defaults
The **User Defaults** page has 7 tabs—more than will fit on screen. In the example on the right note the little triangle on the tab bar. Clicking that triangle will display the remaining tabs.

**Step 1: First tab: User Defaults 1.**

Fill in your Academic Institution and hit the tab key. This will automatically populate the Career Group and Facility Group fields.

Fill in the Academic Career. If you deal with more than one Career, you can leave this blank, but this will prevent you from setting defaults on other tabs.

If you commonly deal with prospects and applicants for a given Term and/or a certain Academic Program, Plan, etc., fill those fields in as well.

Remember that even though these values will be filled in on prospect and application pages, you can always change them there.
Step 2: User Defaults 2 tab

On this tab there are two fields important for people working with applications: Application Center and Recruiting Center.

When you use the lookup buttons to see your choices for these fields, what you see is determined by the settings you made on User Defaults 1.

You may also elect to set a default Campus.

FYI

When you enter an application for someone who does not have a prospect record, the system tries to create a prospect record. This will fail if you don’t have your default Recruiting Center set. Program Addition will also fail if Application and Recruiting Centers are not set.
Step 3: User Defaults 3 tab

The **User Defaults 3** tab is not generally useful, since the values in these fields vary widely from application to application.

However, you may want to check the **Financial Aid Interest** box, if you feel that almost all applications you enter will have that box checked. This will save you from having to remember to check the box on every application.
Step 4: User Defaults 4 tab.

On this tab most people will only need to set the **Carry ID** checkbox.

A check in this box will make **Carry ID** work in **Search/Match**. If you don’t check this box, **Carry ID** will not work. Refer to the **Search/Match Quick Guide** for details.
Step 5: Communication Speed Keys

(The Enrollment Override Defaults tab is not used until Student Records goes live.)

A Communication Speed Key is a quick way to enter data required to assign a communication to a prospect or applicant. Your Institution will have a set of Speed Keys already defined.

To use a Speed Key when assigning a communication, you will need to have set up the key for your use on this tab.

Select the Administrative Function.

Admissions uses 4 Administrative Functions for communications: PROS and PROP for prospects, and ADM and ADMP for applications. Every admissions communications is assigned to one of these four functions.

Once you have selected an Administrative Function, you can select the Speed Key you want (next page).
Use look up to find the desired Speed Key (Comm key).

If you have a standard Comment that you always want to insert when you assign this communication to a prospect or applicant, you can enter it here. Then you won’t need to remember to type it in each time you assign this communication.

You may work with several communications. To add more Speed Keys to your repertoire, use the + to add more rows.

There is a Plus (outlined in green) to add more Administrative Functions, and a Plus (outlined in red) to add more Comm Keys to the same Administrative Function.
Here is an example of an **ADMA Comm Key**.

The seventh tab—**User 3C Groups Summary**—shows your security settings for handling communications, checklists and comments.

The person in this example can both view and update USM undergrad communications, checklists and comments for prospects and applicants.

**Step 6: Save**

Click  ![Save](Save)