SETTING UP USER DEFAULTS

This guide will cover:

- How users can setup defaults to keep from having to enter in the same data repeatedly helping reduce processing time.

You may set User Defaults so that you do not have to enter certain search criteria on every search page. These entry-aids control the default values that appear in various fields and on the Find an Existing Value pages. Although the default values are displayed on pages, you can always change the values on each page if you do not want to use the defaults. You can change these defaults as often as you like, or leave them unchanged, if you prefer.

For example, you may set your Academic Institution default to UCINN so that you never have to enter an institution code on search pages. Please do not set all values if your job requires you to work with different Academic Careers, Departments, Academic Program, Academic Plans, Terms, Aid Years, etc.

The Defaults have been split into two groups. Mandatory Defaults and Optional Defaults. Mandatory Defaults should be set for all users. Optional Defaults should be set based on guidance from a Catalyst power user.

MANDATORY DEFAULTS

Step One

Navigate to the following breadcrumb:

Favorites ▼ Main Menu ▼ Campus Solutions ▼ Set Up SACR ▼ User Defaults

Step Two

![User Defaults Screen](image)
- Academic Institution - Click on the magnifying glass and select UCINN.

**Step Three**

- SetID - Click on the magnifying glass and select UCINN.
- Business Unit - Click on the magnifying glass and select UCINN.
- Institution Set - Click on the magnifying glass and select UCINN.

**Step Four**

- [Form fields and options]
- [Save and Notify buttons]
• Carry ID - Check box to carry EMPLID for one page to another. ID will not carry if user only performs search on page. User needs to access page for current search parameter page before ID will carry to another search page.

OPTIONAL DEFAULTS

Step One

Navigate to the following breadcrumb:

Step Two

- Career Group SetID - Click on the magnifying glass and select UCINN.
- Facility Group SetID - Click on the magnifying glass and select UCINN.
- Academic Career - If you work primarily with a certain Academic Career (UniverSIS equivalent: Credit Level) use the magnifying glass to select the desired value. The list of available values are UGRD (Undergraduate), GRAD (Graduate), LAW (Law), MED (Medicine).
- Academic Group - Leave Blank
- Subject Area - If you work primarily with one subject, click on the magnifying glass and select the subject from the available list. If you work with multiple subject, equally, leave this field blank.
- Term - Set to the current or most frequently accessed term and update when the default term changes.
- Academic Program - Leave Blank
- Academic Plan - Leave Blank
- Academic Sub-Plan - Leave Blank

**Step Three**

- Aid Year - Leave Blank
- Application Center - If you work primarily with a certain Academic Career (UniverSIS equivalent: Credit Level) use the magnifying glass to select the desired value. The list of available values are UGRD (Undergraduate), GRAD (Graduate), LAW (Law), MED (Medicine).
- Recruiting Center - Leave Blank
- Cashier's Office - Leave Blank
- Department - Leave Blank
- Admit Type - Leave Blank
- Campus - Leave Blank

**User Defaults 1**

**User Defaults 2**

**User Defaults 3**

**User Defaults 4**

**Enrollment Override Defaults**
Step Four

- Academic Level - Leave Blank
- Application Method - Leave Blank
- Last School Attended - Leave Blank
- Graduation Date - Leave Blank
- Housing Interest - Leave Blank
- Financial Aid Interest - Leave Blank
- Transcript Type - Leave Blank
- Transcript Rcvd Data Source - Leave Blank
- Transcript Rcvd Medium - Leave Blank
Step Five

- Output Destination - Leave Blank
- Transcript Type - Leave Blank
- Flexible Transcript Type - Leave Blank
- Advisement Report Type - Leave Blank
- School Code - Leave Blank
- Program Number - Leave Blank
- Printer Name - Leave Blank
Step Six

- Closed Class - Leave Blank
- Override Unit Load - Leave Blank
- Override Class Permission - Leave Blank
- Override Requisites - Leave Blank
- Override Time Conflict - Leave Blank
- Override Action Date - Leave Blank
- Wait List Okay - Leave Blank
Step Seven

- Click on the Communication Speed Keys Tab. The Communication Speed Key page will load.

Communication speed keys enable you to create shortcuts for specifying common communication data. Users can select from base default communication keys or modify them.

- Academic Institution - Click in the Academic Institution Field and enter UCINN.
- Administrative Function - Click on the magnifying glass next to the Administrative Function field. Select the Administrative Function Associated with the communications you department will send out.
- No Default - Select the No Default check box if you do not want to specify a default communication key for the administrative function entered.
- Comm Key - Click on the magnifying glass next to the Comm Key field and select the desired comm key/speed key from the list of available values. The available comm keys are based off of security access to certain communications.
- Default Comm Key - Select the Default Comm Key check box if you want to make the entered Comm Key the default value for the Administrative Function entered above. This will automatically populate the comm key when the Administrative Function is entered when generating communications.
- Print Comment - Select the Print Comment check box to have the comment section printed on the communication
- Activity Completed - Select the Activity Completed check box to indicate the communication was generated successfully. If the Letter Generation or Communication Generation processes are
used the system automatically makes the communication completed so the process will not select the ID again for the same communication.

- **Unsuccessful Outcome** - Select the Unsuccessful outcome check box to indicate the communication was unsuccessful. If the Letter Generation or Communication Generation processes was used the system automatically checks the box when the process could not find critical data to generate the communication.

**Step Eight**

- Click on the User 3C Groups Summary Tab. The Operational Groups summary section will load.

<table>
<thead>
<tr>
<th>Institution</th>
<th>Description</th>
<th>Inquiry Indicator</th>
<th>Update Indicator</th>
<th>Delete Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Cincinnati</td>
<td>Admissions Application</td>
<td></td>
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<tr>
<td>University of Cincinnati</td>
<td>Bursar</td>
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<td>University of Cincinnati</td>
<td>Collections</td>
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<td>University of Cincinnati</td>
<td>Credit Evaluation</td>
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<td>Evaluations</td>
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<td>Financial Aid</td>
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<td>University of Cincinnati</td>
<td>College of Law</td>
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<tr>
<td>University of Cincinnati</td>
<td>One Stop Student Service Ctr</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>University of Cincinnati</td>
<td>Student Records</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- 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.
- To limit the ability to see communications, comments and checklists associated with a certain 3C group check the box located under the Inquiry Indicator column and click Save at the bottom of the page.
Step Nine

- Leave this tab blank.
- Click the Save button at the bottom of the page.

You have now completed the steps of Setting up User Defaults.