ADA Training
Created on Monday, December 01, 2008

COPYRIGHT & TRADEMARKS

Table of Contents

ADA Training

Signing In to PeopleSoft

Procedure

Signing in to PeopleSoft is just like opening a secured page on a website on the Internet. You enter the URL in your browser window's address box to open the site. When the site opens, you type in your Username and Password to access the secured areas.

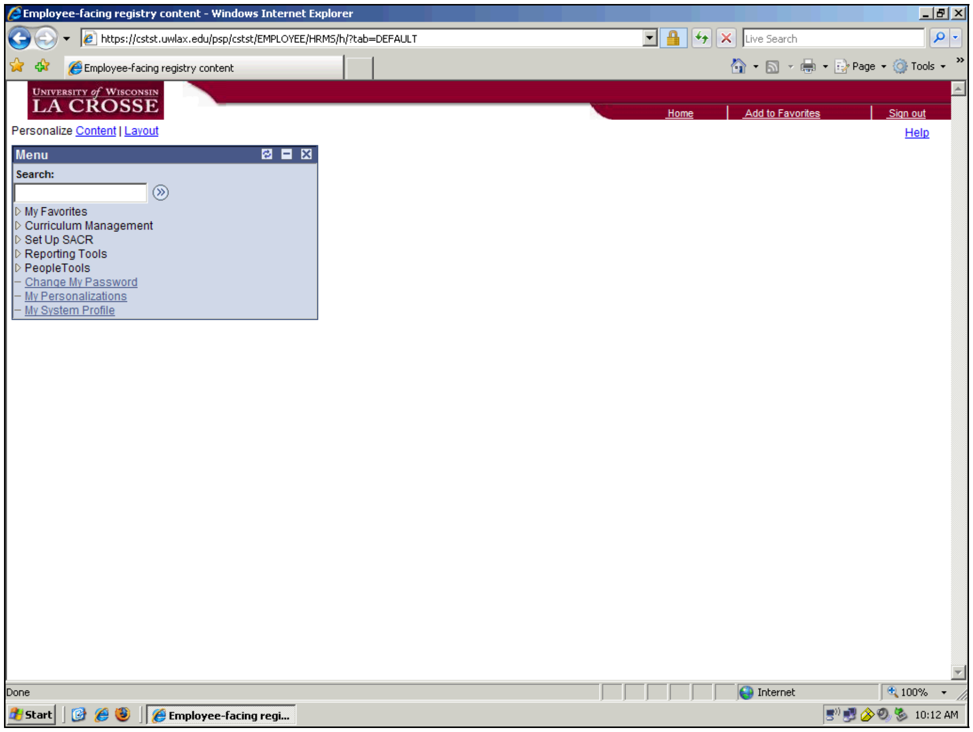
Step	Action
1.	Every user will be assigned a Username. Both Username and Password fields are case sensitive. Enter the desired information into the **Username:** field. Enter "**ADA**".
2.	Click in the **Password:** field.

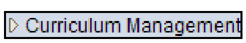
Step	Action
3.	Once you have typed the Username, you can type in the Password. Notice that for security purposes, when you type the password, it will be shown with asterisks. Also note that passwords are case sensitive. Enter the desired information into the **Password:** field. Enter "**ADAps**".
4.	Click the **Sign In** button. 
5.	If the information you entered is valid, the system will display the Home page for your PeopleSoft system. For security purposes, your PeopleSoft system logs you out of your application after a period of inactivity determined by your security administrator. Two minutes prior to your session timeout, the system provides a warning that your browser session is about to expire.
6.	You have successfully signed in to a PeopleSoft application. **End of Procedure.**

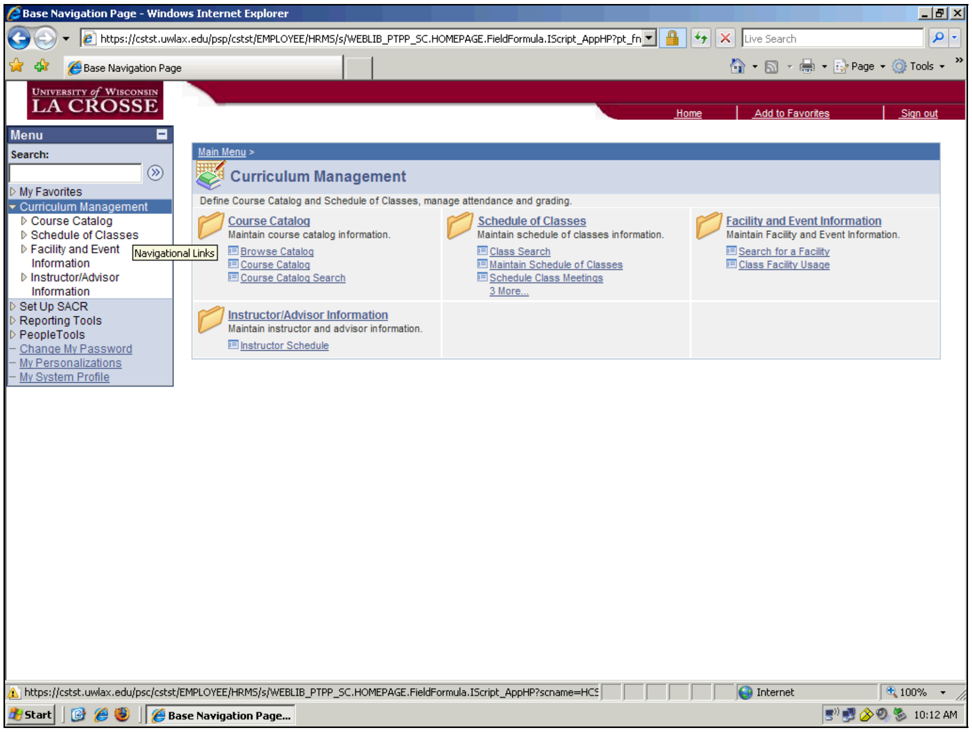
Using the Navigation Pagelets

Procedure

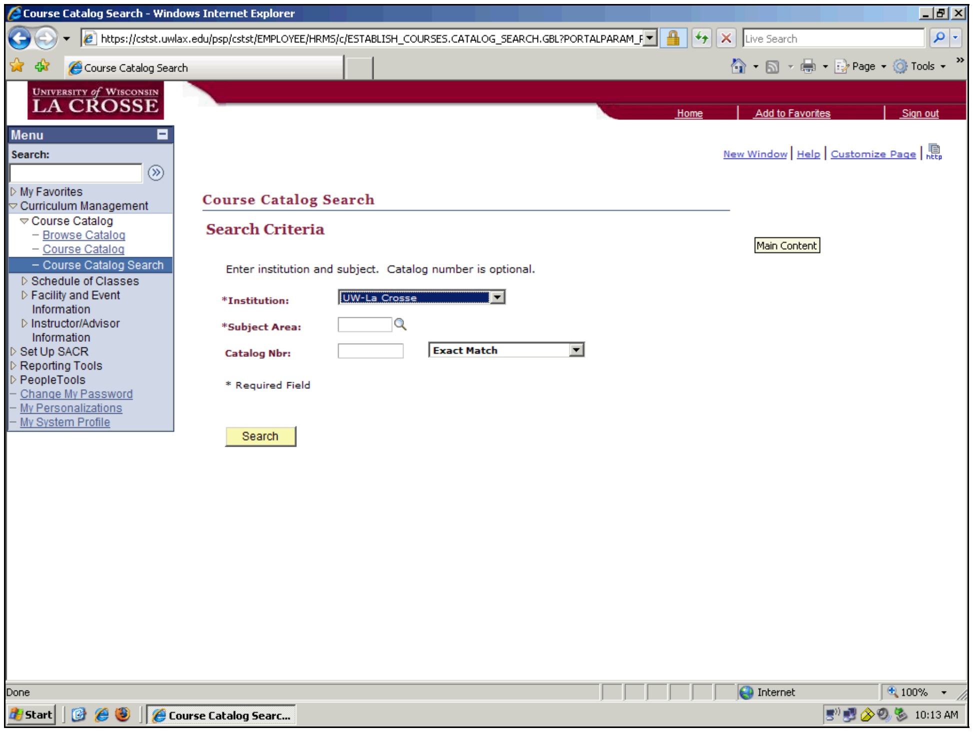
Use the navigation pagelet to view and select various folders and links.



Step	Action
1.	The menu pagelet is set up in a navigation hierarchy. When you click a level to expand it, the next level is displayed and highlighted. Click the **Curriculum Management** link. 



Step	Action
2.	Click the **Course Catalog** link. Course Catalog
3.	You click a link to open a component. When opening a component, a search page is generally displayed first. Click the **Course Catalog Search** link. Course Catalog Search



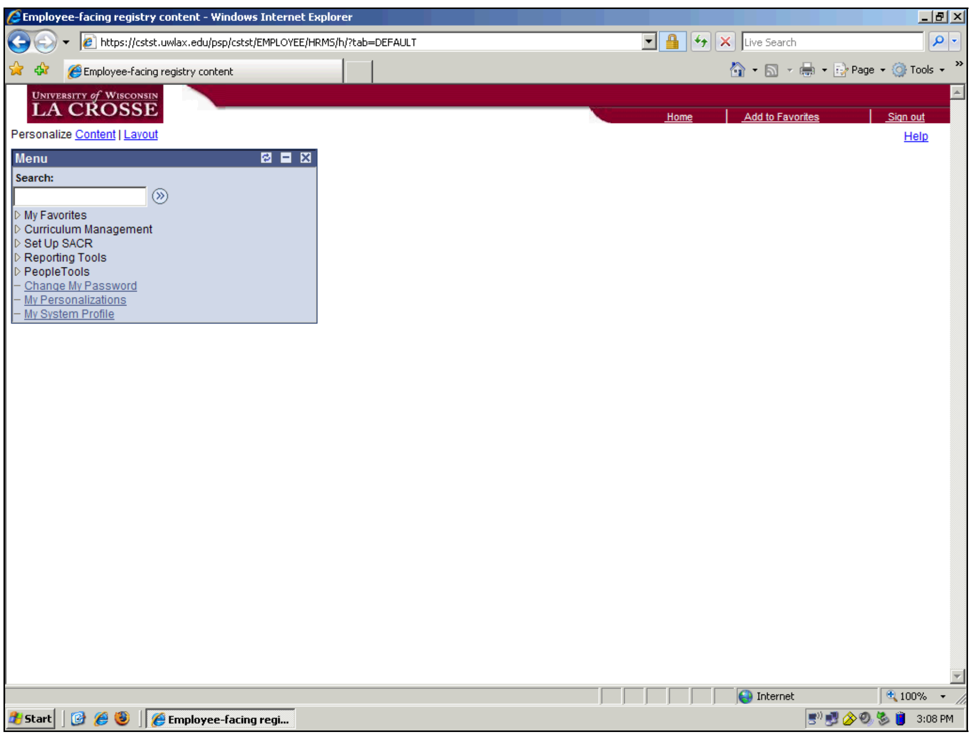
Step	Action
4.	You can collapse the menu pagelet to display more of the page in the window. Click the **Collapse (Ctrl+Y) Menu** button. 
5.	You can collapse and expand the menu pagelet at any time. Click the **Expand (Ctrl+Y) Menu** button. 
6.	Use the **Search** field to search for a registered content reference within the system. You enter the name of the page you want to find, and press **Enter** or click the **Search** button. This action opens the **Search** page displaying the results.
7.	In summary, it is easy to navigate in your PeopleSoft application by expanding and collapsing the hierarchy to get to the desired pages. **End of Procedure.**

Recognizing Universal Navigation Elements

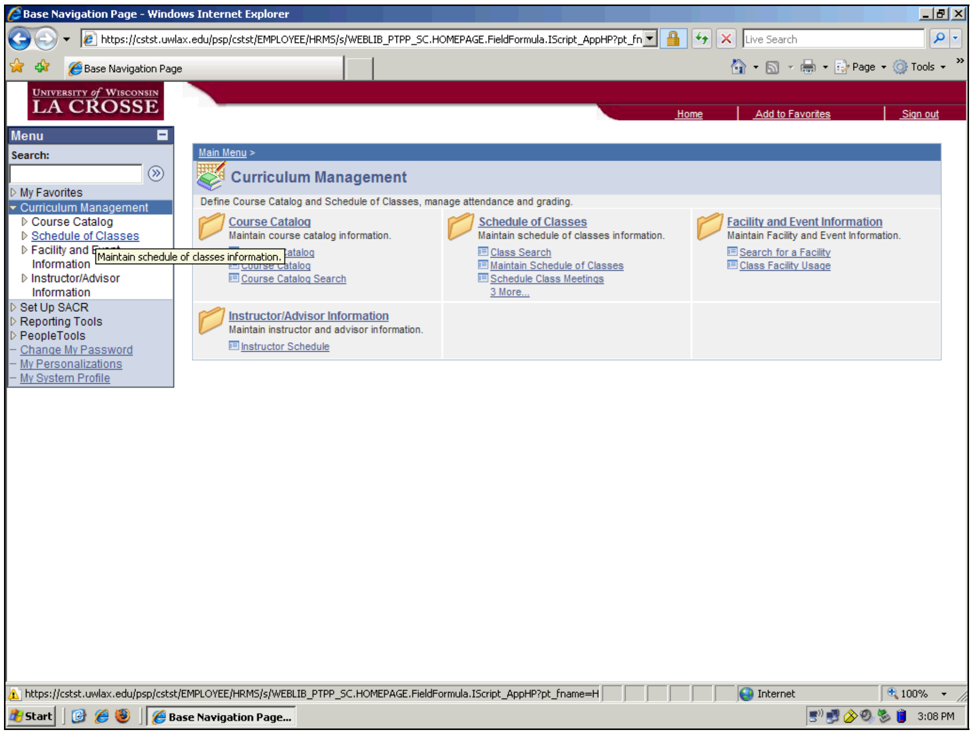
Procedure

This topic discusses some basic navigation elements common to all PeopleSoft applications.

Step	Action
1.	Displayed at the top of every page, is the universal navigation header. It contains the following links: Home, Add to Favorites, and Sign out.
2.	Click the Home link to return to the Home page for the application.
3.	Favorites are similar to standard browser bookmarks for frequently accessed folders and content. Once you add a favorite, it is maintained under the **My Favorites** folder in the menu pagelet. Once a favorite is saved, expand the **My Favorites** folder and click the hyperlink you want to view. You use **Edit Favorites** to re-label and re-sequence your favorites. You can also edit saved favorites when a URL is updated or one is deleted.
4.	Click the **Sign out** link to sign out of the application.
5.	PeopleSoft uses a **menu pagelet** to display a menu structure composed of a hierarchy of folders and content references that you can use to navigate to various application pages.

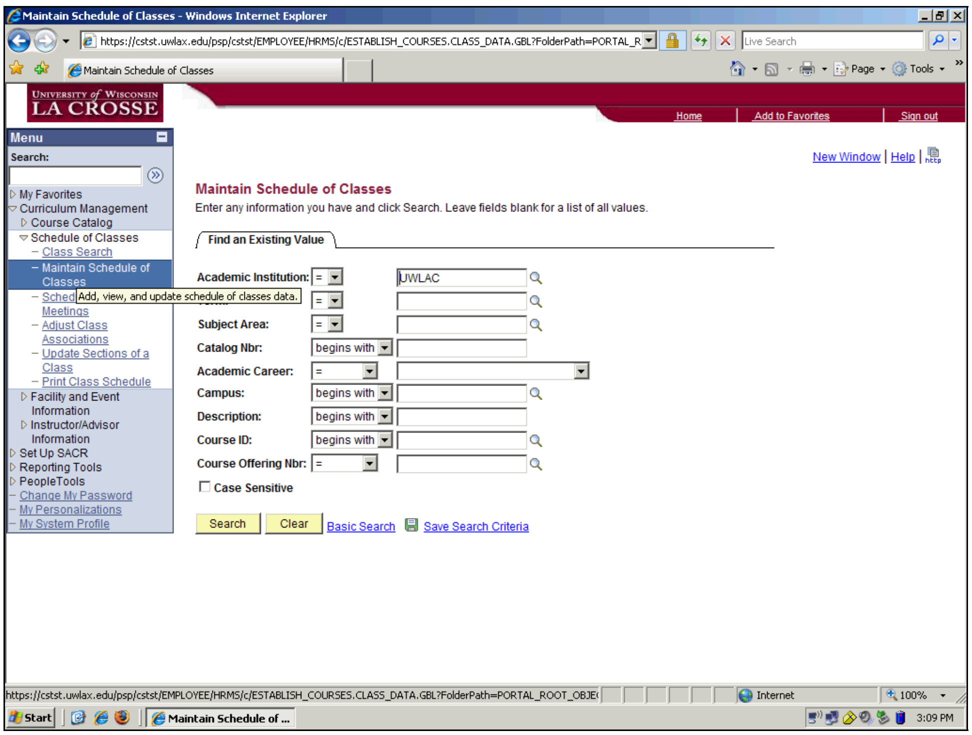


Step	Action
6.	Expanding and collapsing these folders is one way of getting around your PeopleSoft application. Click the **Curriculum Management** link. ▷ Curriculum Management



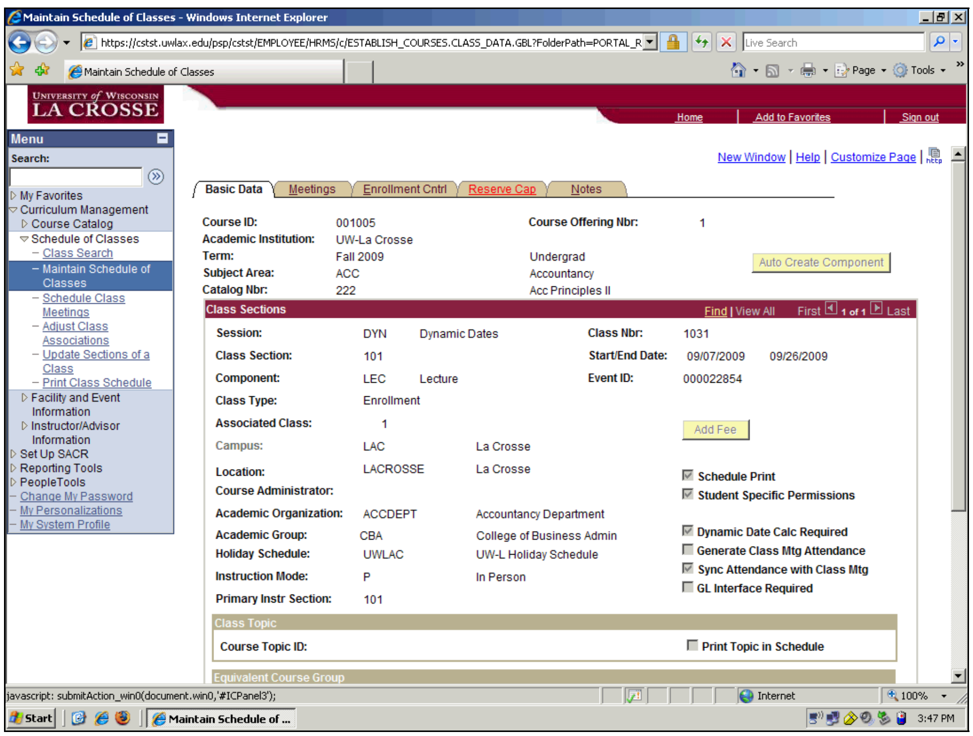
Step	Action
7.	 Click the **Schedule of Classes** link. ▷ Schedule of Classes
8.	In addition to the menu pagelet, PeopleSoft applications include **navigation pages**, which serve as alternatives to the menu pagelet. These navigation pages provide a user-friendly navigation tool in the form of task-driven pages that provide intuitive access to pages needed to complete your business processes. These navigation pages can be configured to incorporate the use of icons to further increase your ability to intuitively navigate through tasks.

Step	Action
9.	You can click the link in the menu pagelet, the icon in the navigation page, or the link in the navigation page to navigate to the desired level. Components are associated with the lowest level of the hierarchy. When you access this level, the corresponding pages or search page appears to the right of the menu pagelet. Click the **Maintain Schedule of Classes** link.



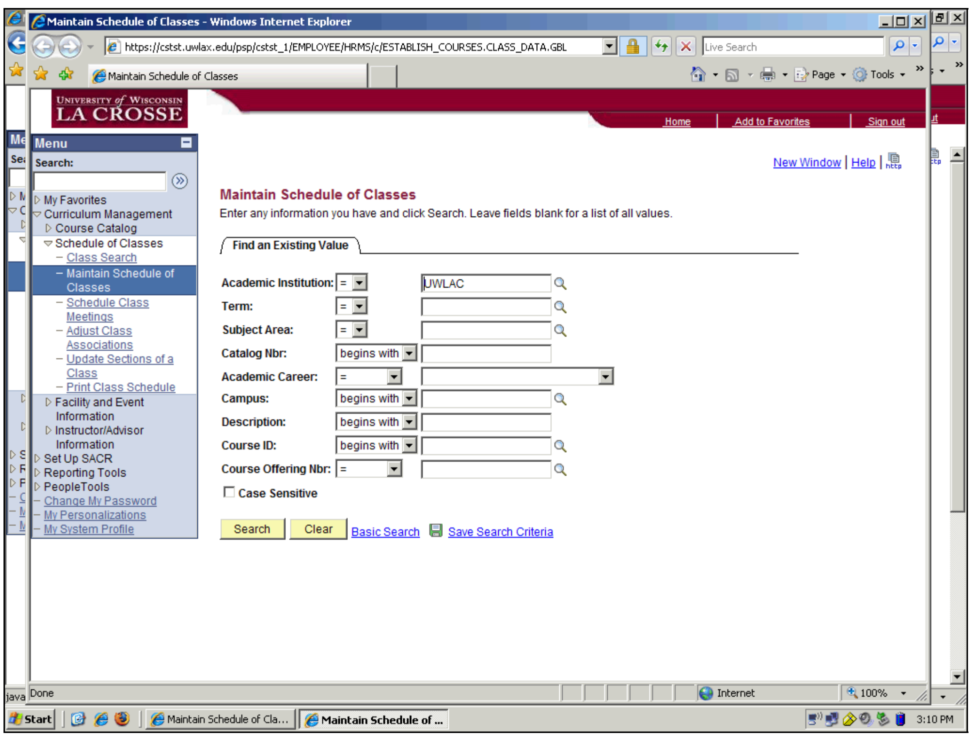
Step	Action
10.	Click in the **Term** field.
11.	Enter the desired information into the **Term** field. Enter "**2104**".
12.	Click in the **Course ID** field.

Step	Action
13.	Enter the desired information into the **Course ID** field. Enter "**001005**".
14.	Click the **Search** button. Search
15.	To enter data in a PeopleSoft application, you first access a component. Components consist of several pages within the same window. Usually these are pages that are related and need to be completed in succession. To move between the pages, you can select the folder tabs, press the corresponding access key, or click the links at the bottom of each page.

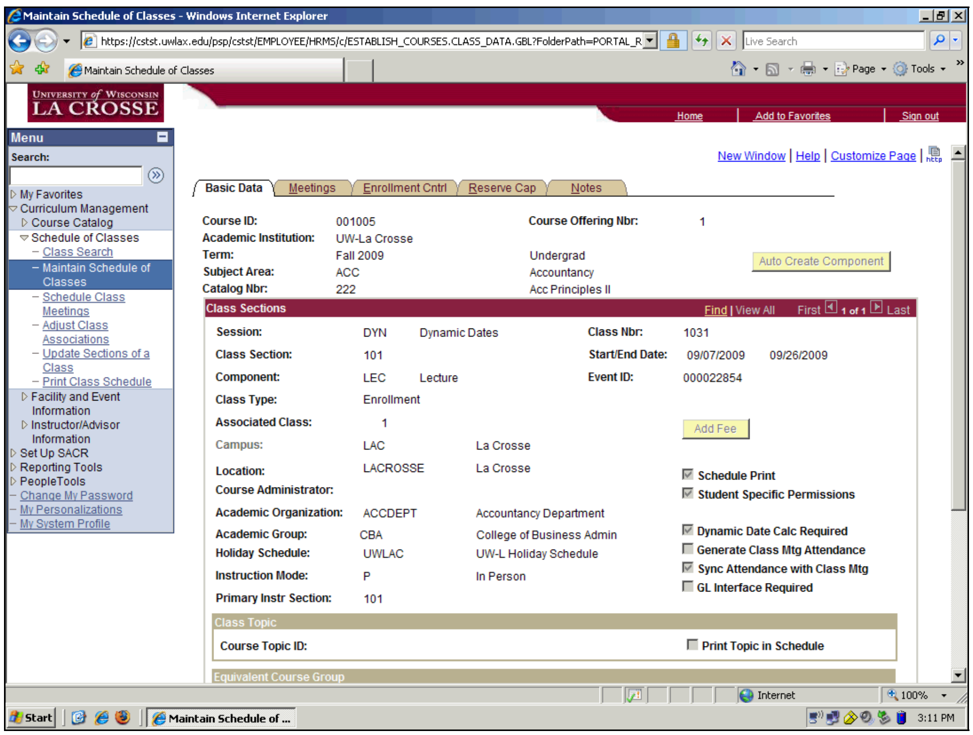


Step	Action
16.	Click the **Reserve Cap** tab. Reserve Cap
17.	The links appear below the row of buttons. Folder tabs, access keys, and links are discussed in more detail in the "Navigating To and Within Pages" lesson.

Step	Action
18.	After making any changes to a page, you must click the **Save** button in order for the system to commit your changes to the database. Pages in a component are treated as a single entity when you try to save data. If you have not completed all required fields, the system prompts you to enter additional data.
19.	Just below the universal navigation header sits the **pagebar,** which is a series of links and buttons. All options may not be available for each component.
20.	Use the **New Window** link to open a new browser window, or child window. The new window shows the current component pages as well as the navigation to your current position. From this window, you can view or enter data. You can open as many child windows as needed using the New Window link. Do not use your browser's File, New, Window feature. Doing so copies the current HTML from the parent window, instead of opening a new PeopleSoft-maintained window session. Click the **New Window** link. New Window



Step	Action
21.	Notice the new browser window. Click the **Close** button.
22.	The **Help** link opens online PeopleBooks help for the specific transaction page that is displayed.



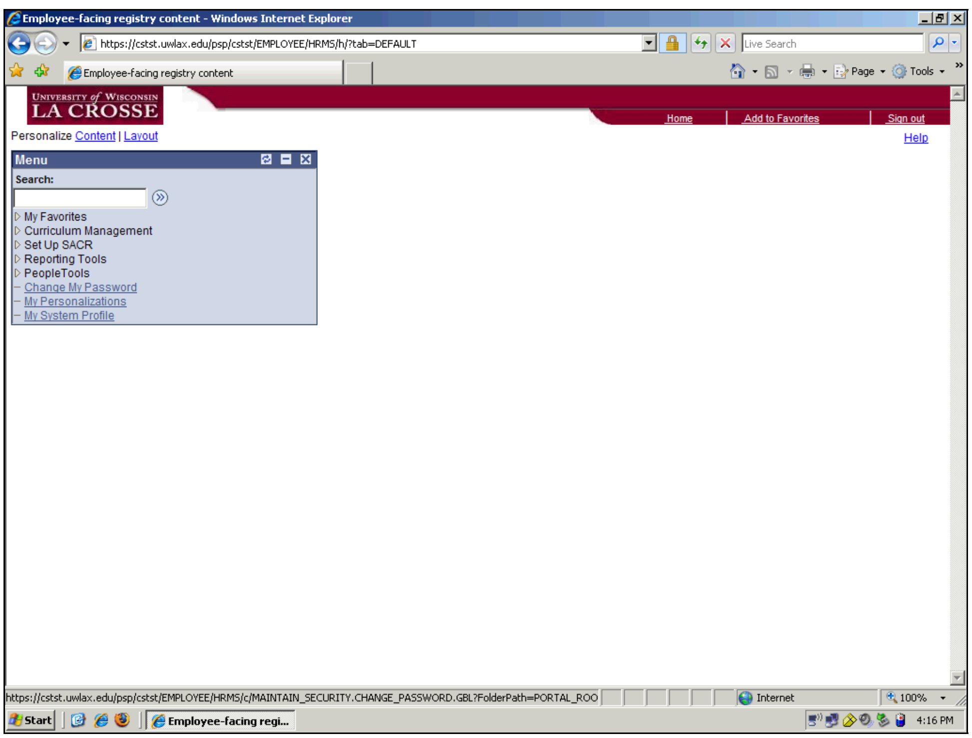
Step	Action
23.	The **Customize Page** link enables you to control the initial display of the page. Click the **Customize Page** link. Customize Page
24.	Use this page to: Select the initial page in the component to be displayed. Save the state of the expanded and collapsed sections. Save the state of the View All settings on the page for grids and scroll areas. Customize the page field tabbing order. Copy and share the settings that you have saved for the customized page. Click the **Cancel** button. Cancel

Step	Action
25.	Use the **http** icon to copy the current page URL to the clipboard so that it is available for pasting in emails or other applications.
26.	In summary, PeopleSoft's browser-based interface is intuitive and easy to use. **End of Procedure.**

Changing Passwords and Using Personal Preferences

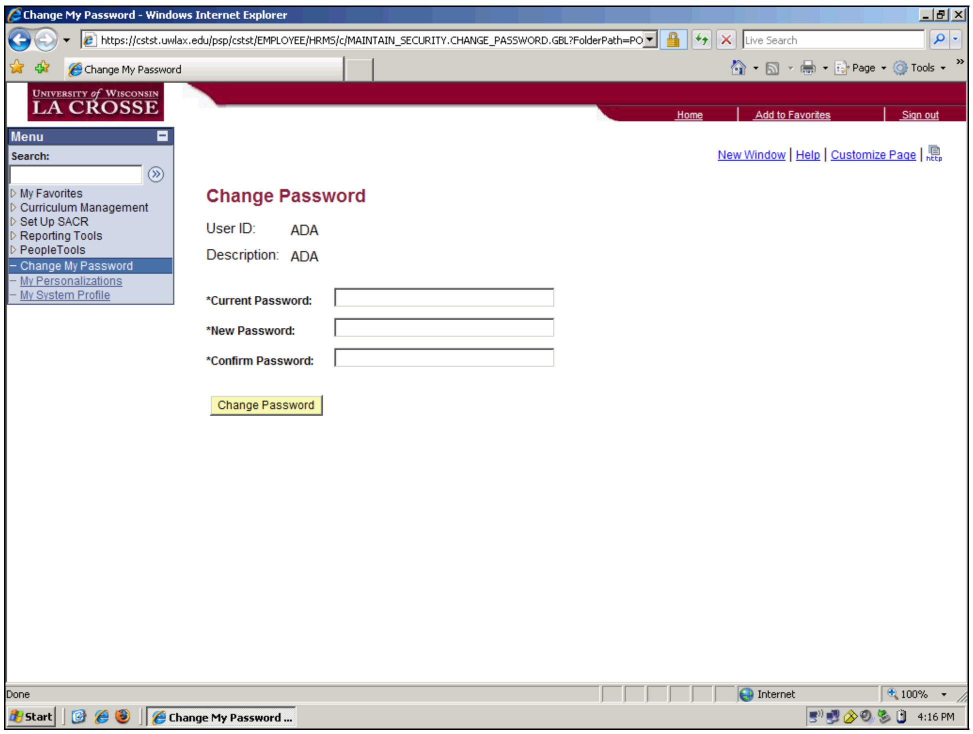
Procedure

In the menu pagelet, you have access to three bookmarks that enable you to make changes based on your own preferences: Change My Password, My Personalizations, and My System Profile.



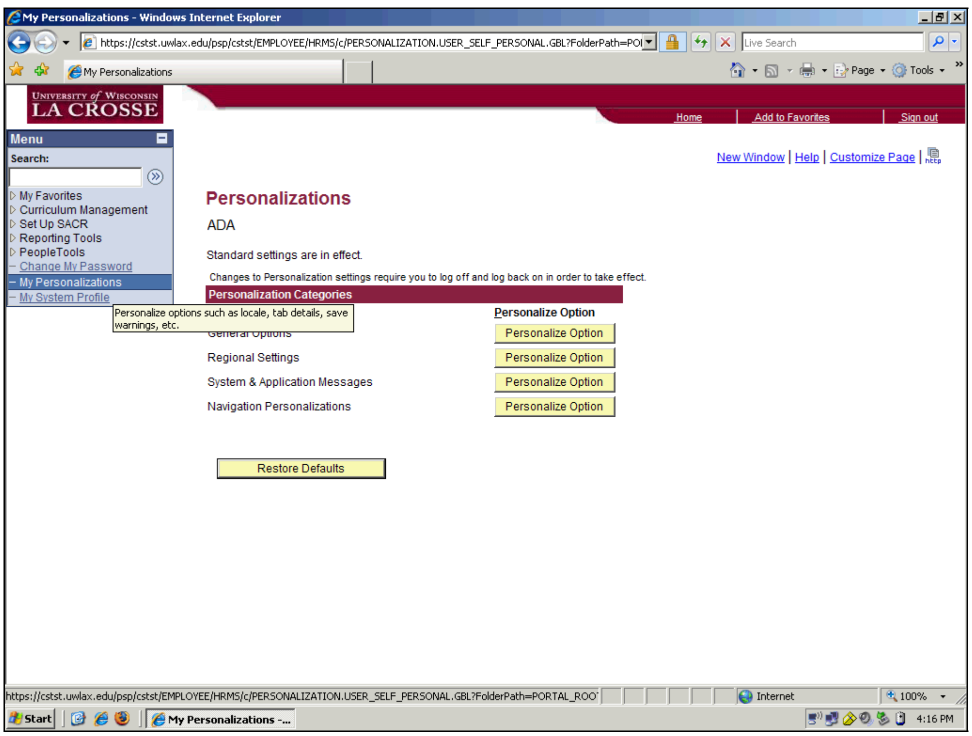
Step	Action
1.	The links are located at the bottom of the menu pagelet. Click the **Change My Password** link. Change My Password

Step	Action
2.	You can use from 1 to 32 characters to create your password. Your administrator, however, has the option of implementing additional password controls, such as minimum number of characters, which may result in additional requirements for password changes.



Step	Action
3.	Click the **My Personalizations** link. My Personalizations
4.	Your administrator determines which options you can modify. The personalizations that can be made include locale-specific changes, a mode for pages to support assistive technologies, or changes to images. The personalization categories include: General Options, International & Regional Settings, System & Application Messages, and Navigation Personalizations.
5.	**General Options** includes Accessibility Features and Multi Language Entry. If you require support for assistive technologies, select the desired layout mode from this personalization. For Multi Language Entry, on pages where multiple language entry is available, you can choose to enter data in the language you specify in the Data Language drop-down list.

Step	Action
6.	Use **Regional Settings** to personalize your date and time formats. Choose settings for afternoon and morning designators (AM or PM, or am or pm), date format (MM/DD/YY, DD/MM/YY, or YY/MM/DD), choosing a local time zone, and so on.
7.	Use **System & Application Messages** to choose whether or not you receive messages when confirming a save action and when you attempt to leave a transaction without saving it first. Save Confirmation is a personalization option where you can select whether or not you would like a message to appear when a save action is in progress.
8.	Use the **Navigation Personalizations** option to set the default values for tabs and how the menu collapses. Icons and a drop-down list box with values are also included in the description. The menu collapse personalization enables you to select whether the menu should automatically collapse when a transaction is selected.



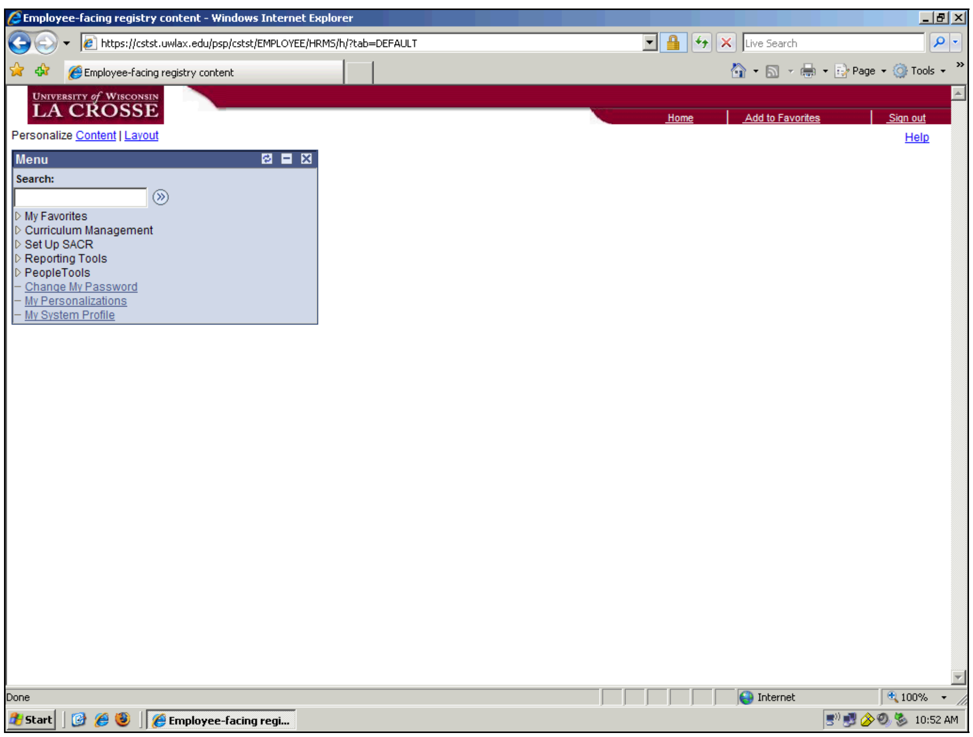
Step	Action
9.	Click the **My System Profile** link. My System Profile

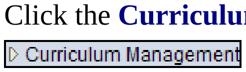
Step	Action
10.	The **General Profile Information** page includes many items that reflect your preferences. Passwords, personalizations (language and currency code), email addresses, alternate users, and workflow attributes are set on this page.
11.	In summary, the **Change My Password**, **My Personalizations**, and **My System Profile** pages enable you to make changes based on your own preferences. **End of Procedure.**

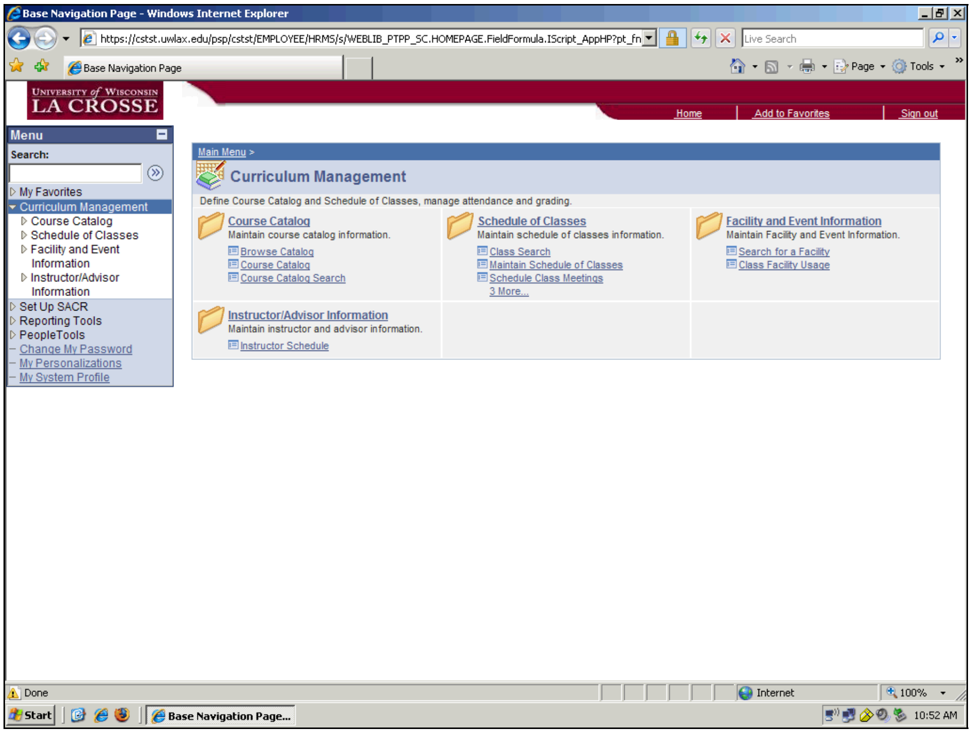
Using Search Pages

Procedure

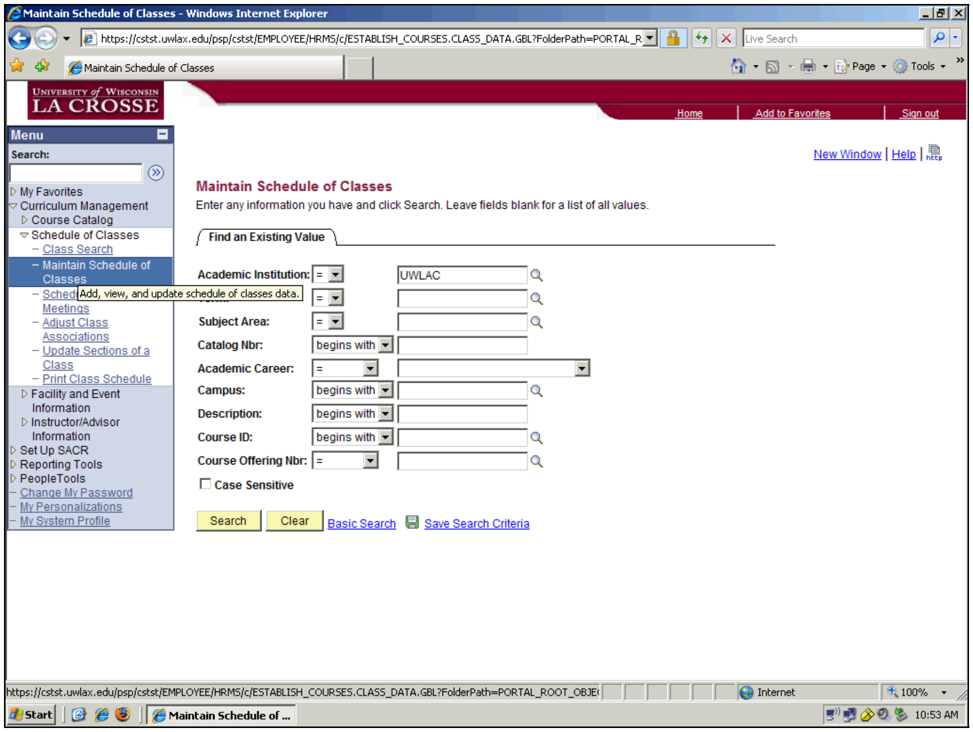
When you open a page or component, a **search page** appears prompting you for the **search keys** needed to locate the data.

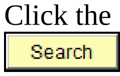


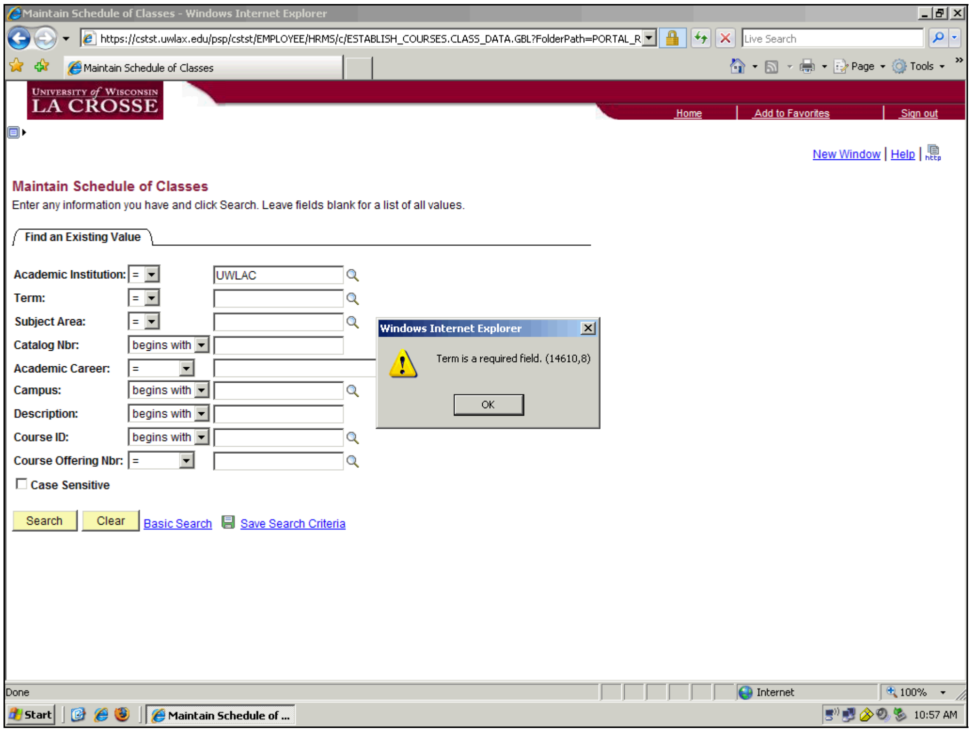
Step	Action
1.	Click the **Curriculum Management** link. 



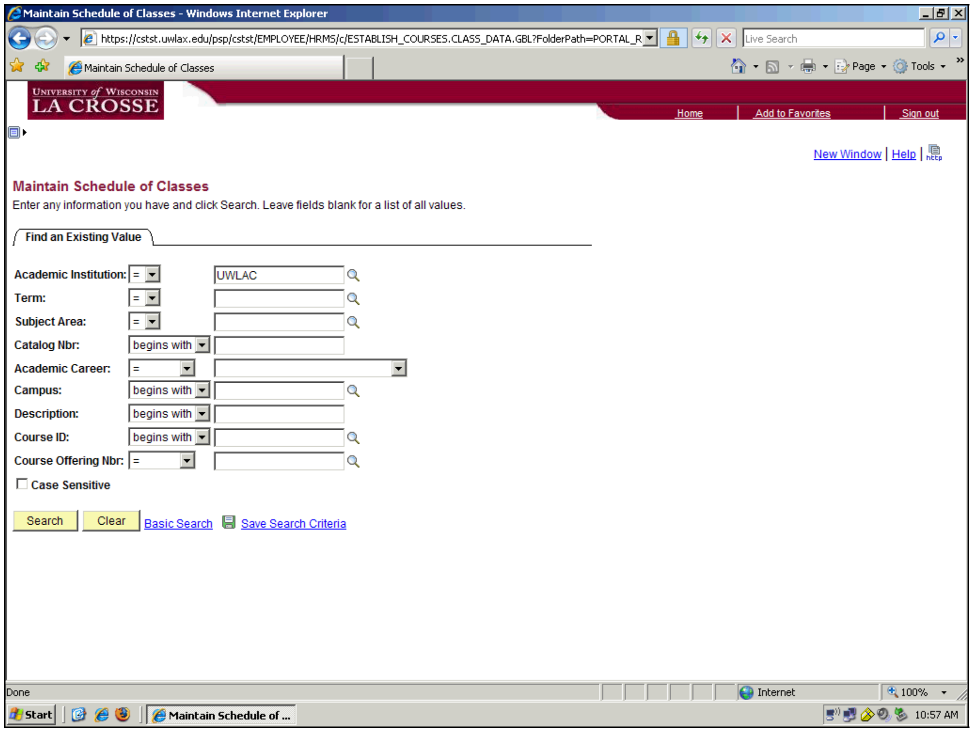
Step	Action
2.	Click the **Schedule of Classes** link.
3.	Click the **Maintain Schedule of Classes** link.

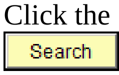


Step	Action
4.	Collapse the menu pagelet to better view the search results on this page. Click the **Collapse (Ctrl+Y) Menu** button. 
5.	The options on the search page enable you to narrow your search by entering values in more than one type of criteria. Operators enable you to conduct a search on limited amounts of information, such as first letters for names, descriptions, or IDs. Operators include "begins with", "contains", "=", "not=", "<", "<=", ">", "between", and "in". If you do not know any criteria for your search, you can just click the **Search** button to display a list of all records in the database. Click the **Search** button. 

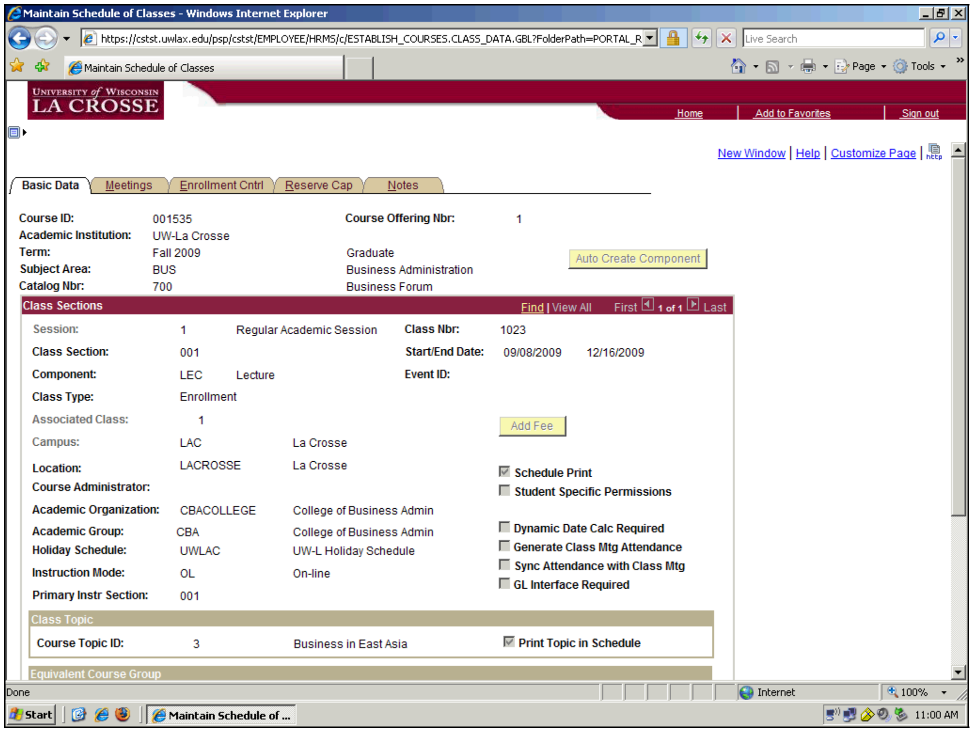


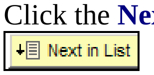
Step	Action
6.	Some search records require that at least one key field be entered to conduct a search. This helps ensure a manageable search results list. Click the **OK** button. 



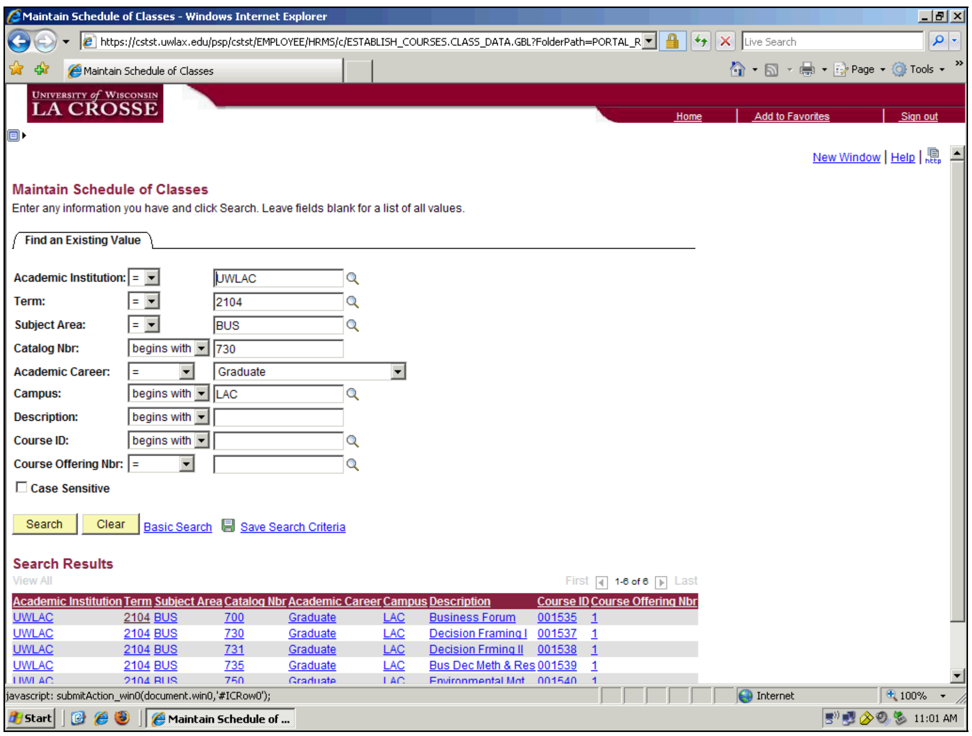
Step	Action
7.	Click in the **Term** field.
8.	Enter the desired information into the **Term** field. Enter "**2104**".
9.	Click the **Search** button. 
10.	This Search Results contains only 12 rows. The search function can retrieve up to 300 entries from the database, displaying several results at a time in the Search Results grid. Use your browser's scroll bar to view all listings on the current page. If the list is subdivided, click the right arrow above the grid to view the next set of listings. If your search retrieves more than the maximum 300 listings, the Search Results grid prompts you to enter additional criteria to reduce the number of search results.

Step	Action
11.	It is better to narrow your search if the results display too many rows to effectively review. One way to narrow your search is to use a key or combination of keys with full or partial values. One way you can select criteria is by using the **Lookup** (magnifying glass) buttons provided for some search fields. For example, suppose you know that the course you are looking for is associated with the academic institution UWLAC, term 2104, subject area Business Administration. Click the **Look up Subject Area (Alt+5)** button.
12.	Use the **Look Up** page to search for and select key values to use in your search criteria. Click an entry in the **Subject Area** column.
13.	Click the **Search** button. Search
14.	The six IDs that match these criteria are displayed in the Search Results table. Click an entry in the **Catalog Nbr** column. UWLAC 2104 BUS 700
15.	The Basic Data page for BUS 700 is displayed.



Step	Action
16.	Click the scrollbar.
17.	**Search List Navigation** buttons are available to process your search. They are displayed below the transaction area of the page.
18.	The **Return to Search** button returns you to the search page for the transaction type.
19.	The **Previous in List** button displays the data for the previous data row in your search list box. This push button appears gray if you did not select the data row from a list box, if there was only one row in the list, or if the data displayed is the first row on the list.
20.	The **Next in List** button displays the data for the next data row in your search box. This push button appears gray if you did not select the data row from a list box, if there was only one row in the list, or if the data displayed is the last row on the list.
21.	Because the search results displayed six matches for your search, and BUS 700 was listed first, notice that the **Next in List** button is active, but the **Previous in List** button is not. If you want to view data for the other courses listed in the search results, you can use these buttons to navigate between the rows of data. Click the **Next in List** button. 

22.	The next ID record in the list is displayed. Click the scrollbar.
23.	You can continue to use the **Next in List** and **Previous in List** buttons to navigate between all the rows in the search list. You can also return to the search page for additional searches. Click the **Return to Search** button. Return to Search



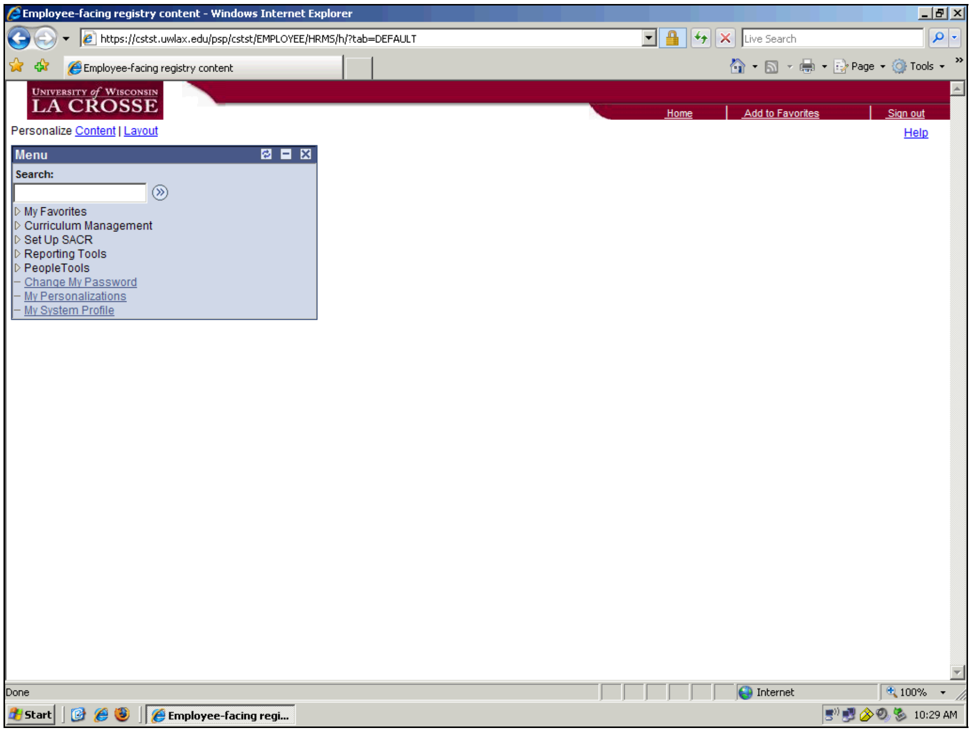
Step	Action
24.	If the search criteria you selected is something that you think you can use again, you can save the specifics of the search. Click the **Save Search Criteria** link. Save Search Criteria
25.	Click in the **Name of Search: The saved search will contain these values** field.

Step	Action
26.	Enter the desired information into the **Name of Search: The saved search will contain these values** field. Enter "**BUS 730 Fall 2009**".
27.	Click the **Save** button. 
28.	Click the **Return to Advanced Search** link. 
29.	Notice that a **Use Saved Search** field list appears so that you can select a saved search. Once a search has been saved, that specific search record is available for use in other search pages that use the same search record.
30.	You can also delete any saved search by using the **Delete Saved Search** link.
31.	For any of the criteria, you also can use the Case Sensitive option. This ensures that the search results are based on matching the case you enter in the criteria.
32.	In summary, you can search for data by using search pages. When conducting a search, you can enter **full** or **partial** values for any of the search keys. Once you open a page or component, you can use the **Next in List** and **Previous in List** buttons to navigate between the rows in the search results. You can also save search criteria. **End of Procedure.**

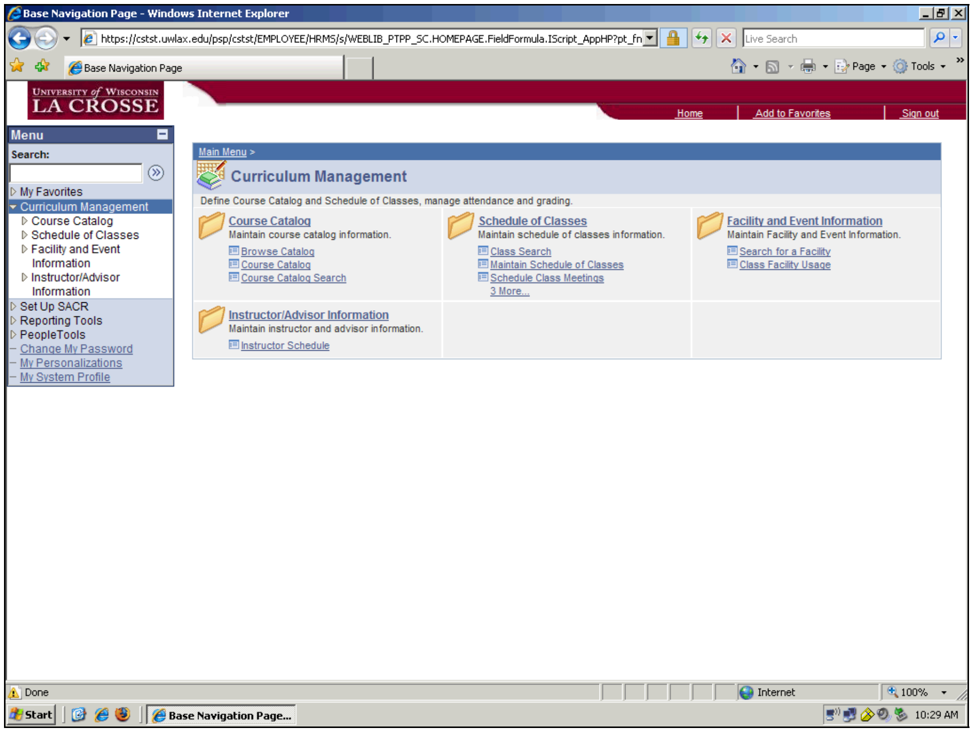
Navigating Between Pages in a Component

Procedure

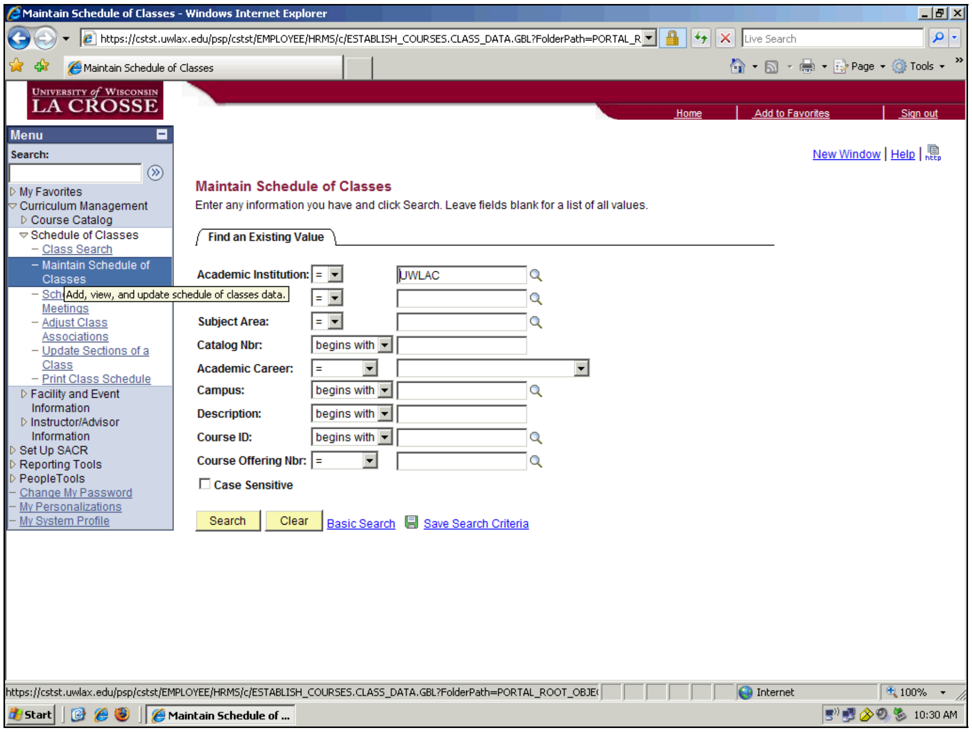
When working with a PeopleSoft application, you are entering or viewing data in a component page. There are several ways to navigate between pages in a component.

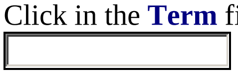
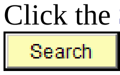


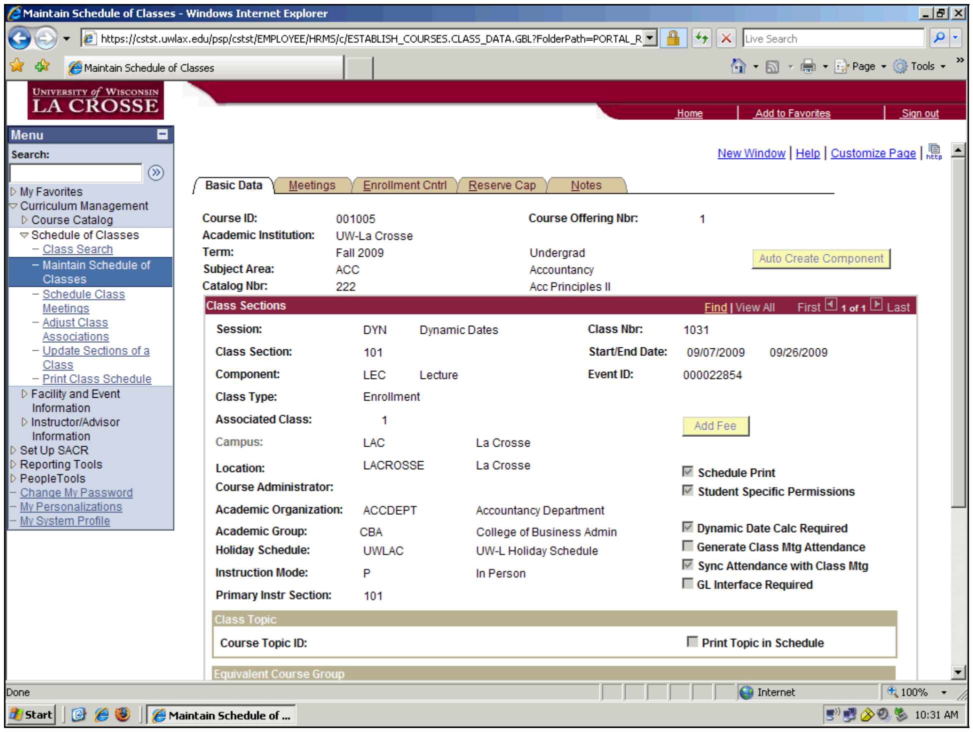
Step	Action
1.	Click the **Curriculum Management** link. ▷ Curriculum Management



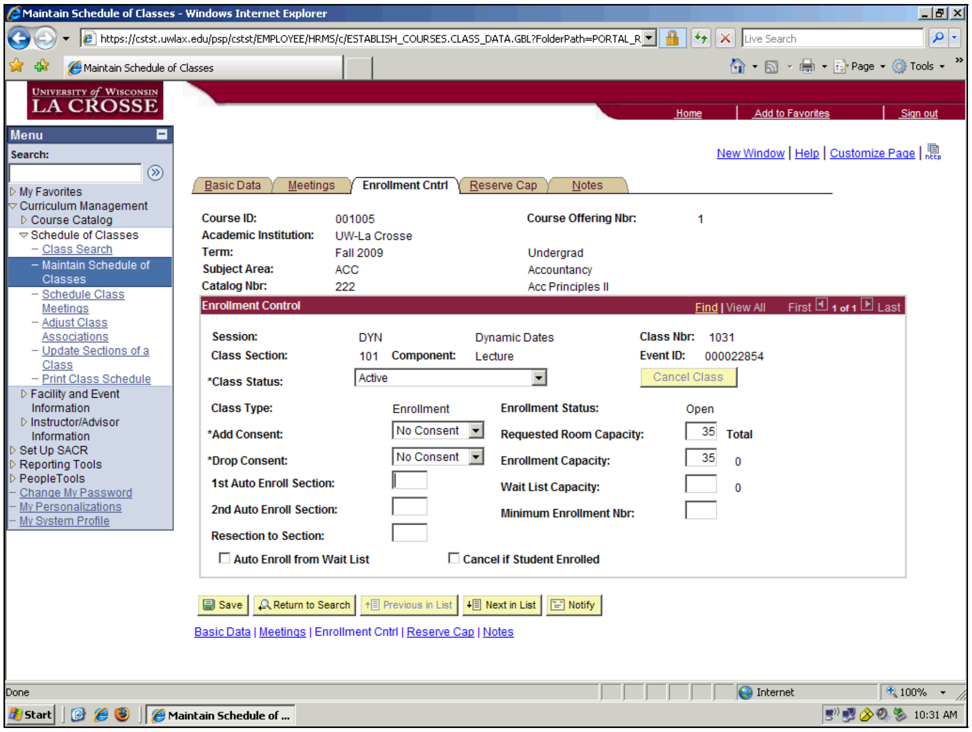
Step	Action
2.	Click the **Schedule of Classes** link.
3.	Click the **Maintain Schedule of Classes** link.



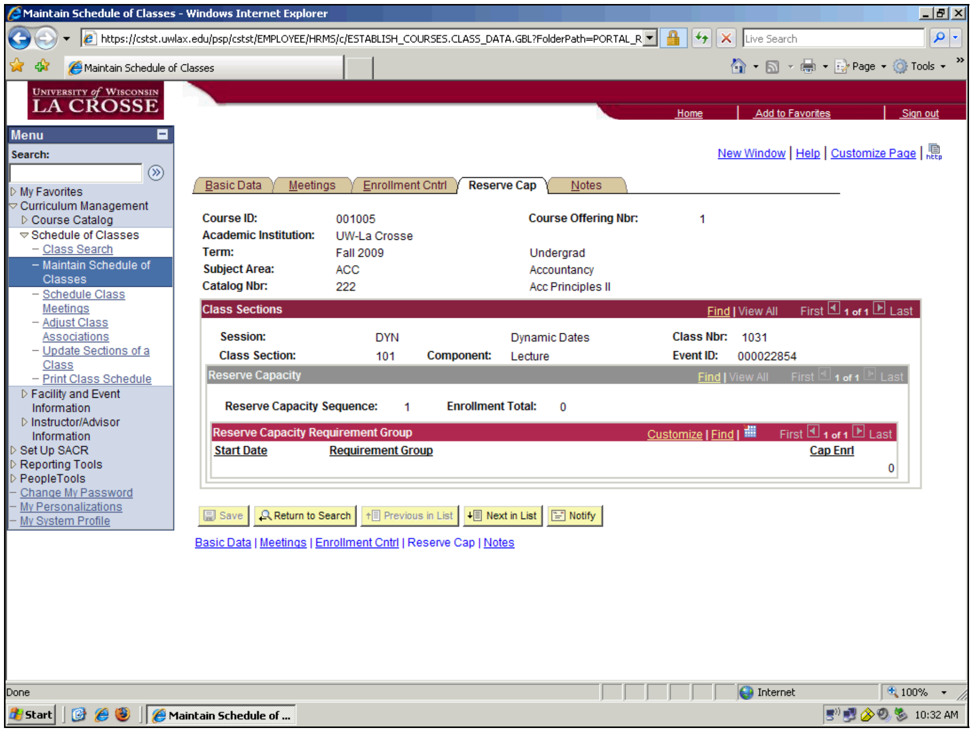
Step	Action
4.	On a search page, you can enter any information you have and then click the **Search** button to retrieve the data. In this example, you are looking for the schedule of classes for the fall 2009 term (2104). Click in the **Term** field. 
5.	Enter the desired information into the **Term** field. Enter "**2104**".
6.	Click the **Search** button. 
7.	The list is displayed in the **Search Results** table. Click an entry in the **Academic Institution** column.



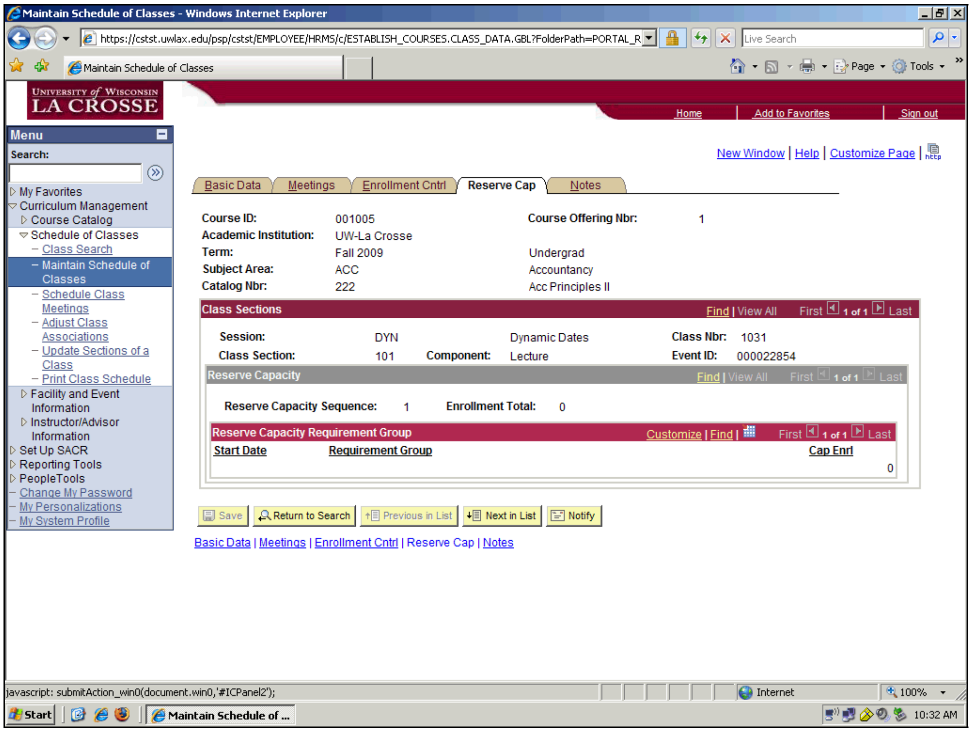
Step	Action
8.	**Components** consist of one or several pages within the same window. They are usually pages that are related and need to be completed together. The component displayed here has five pages. As you finish one page, you select the **folder tab** of the next page you want to open within the component. Click the **Enrollment Cntrl** tab. 



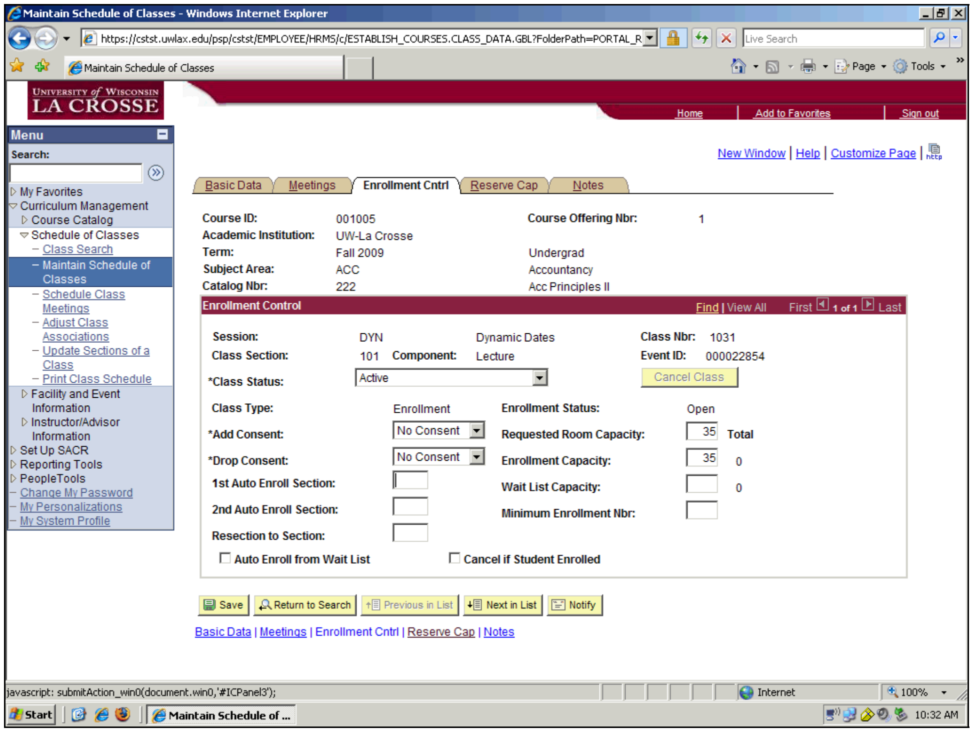
Step	Action
9.	You also can click **hyperlinks** at the bottom of the page instead of selecting the **folder tabs** to move between component pages. Click the **Reserve Cap** link.



Step	Action
10.	The **Reserve Cap** page is displayed. You also can use ALT plus an **access key** to navigate between pages in a component. The **access key** is the letter on each folder tab that is underlined. Navigate back to the **Enrollment Cntrl** page. Press **[Alt+E]**.



Step	Action
11.	Press **[Enter]**.
12.	The **Enrollment Cntrl** page is displayed again.



Step	Action
13.	You can press **Ctrl+K** to display a page that lists all the available **hot** and **access keys**. Press **[Ctrl+K]**.
14.	This page provides a complete list of **hot** and **access keys** you can use to navigate within a PeopleSoft application. Click the scrollbar.
15.	Click the **continue** link. continue
16.	In summary, PeopleSoft offers multiple ways to navigate quickly between pages within a component. **End of Procedure.**

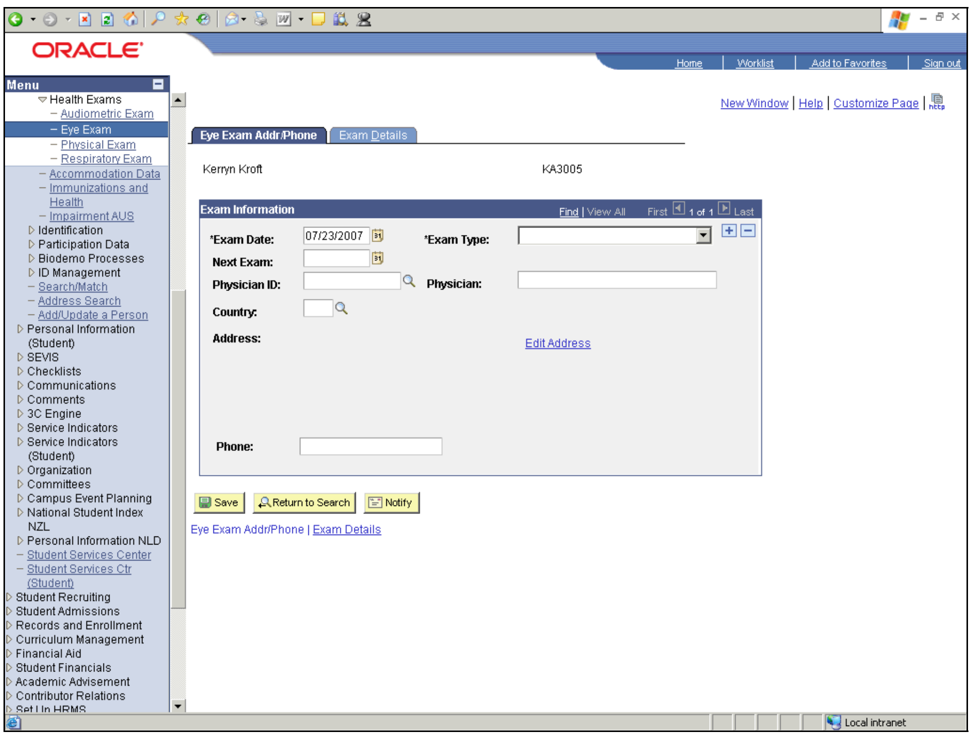
Recognizing Page Controls

Page controls include several types of **data entry fields**, designed to offer different ways to enter and maintain information. Recognizing each type of data entry field helps you to use the system more efficiently.

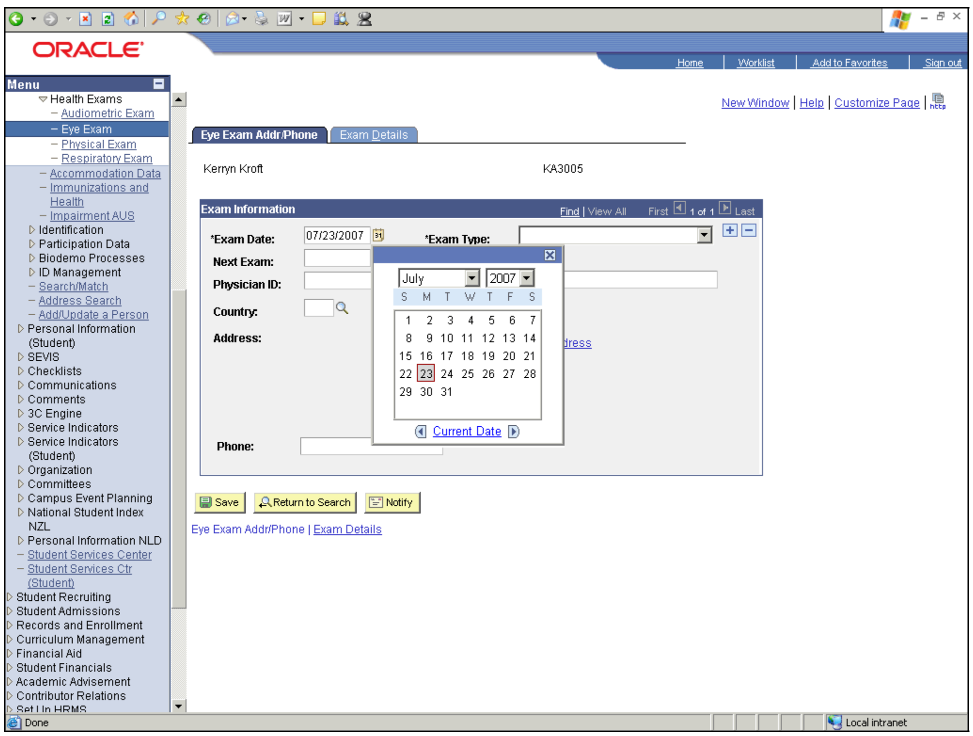
In this example, a student has completed a mandatory eye exam. You need to update the **Eye Exam** component with her information.

Procedure

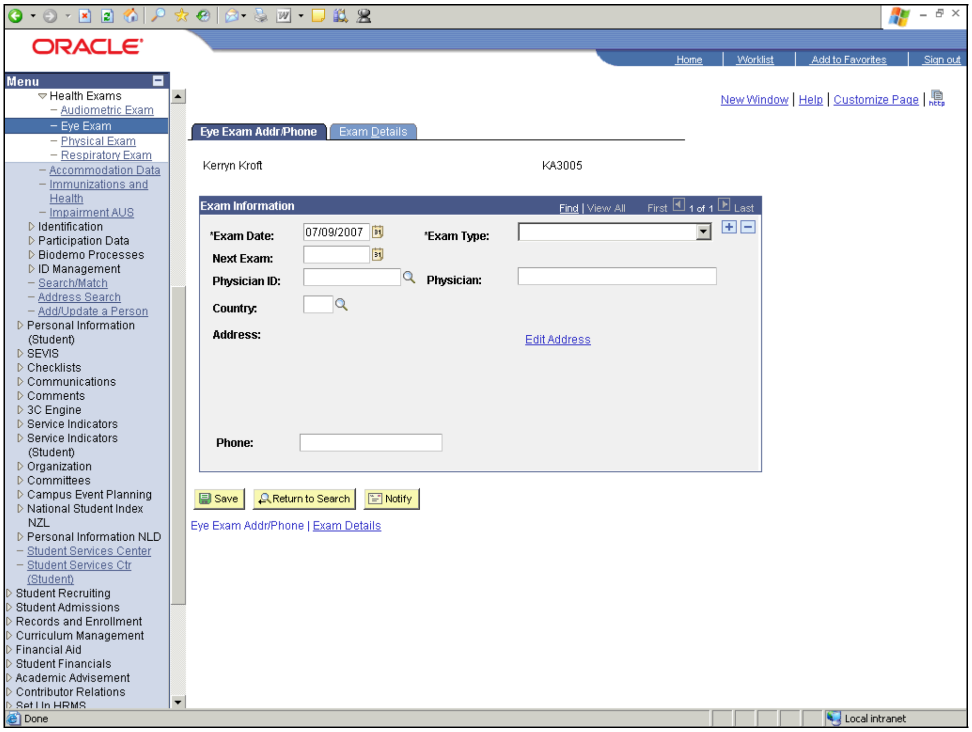
Step	Action
1.	Some fields are required on a page, meaning you must enter a value in the field before you can save the page. The **asterisks** next to the **Exam Date** and **Exam Type** fields indicate that these are required fields.



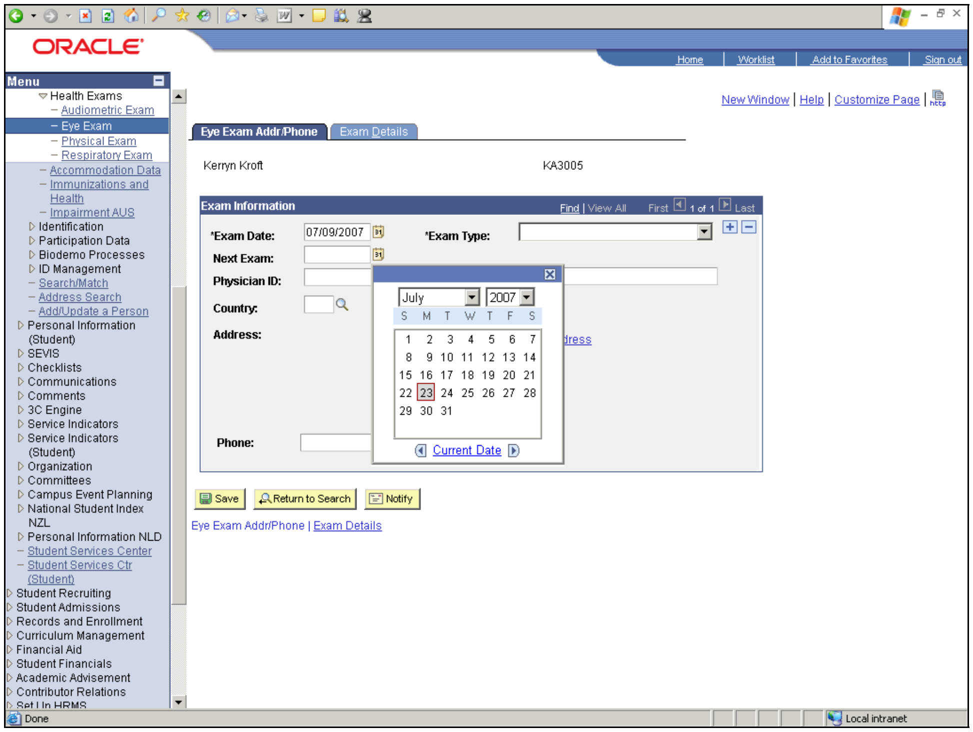
Step	Action
2.	When entering information in a date field, you can use the **date prompt button**. Clicking the button opens a small calendar that displays the current month and day. Alternatively, you can press Alt+5 while in the date prompt field to open the calendar. You may also enter the current day's date by typing "today" in the date field. In this example, the date defaulted to the current system date. You can override this if needed. The exam date is set for 1/24/2005. Click the **Choose Date** button.



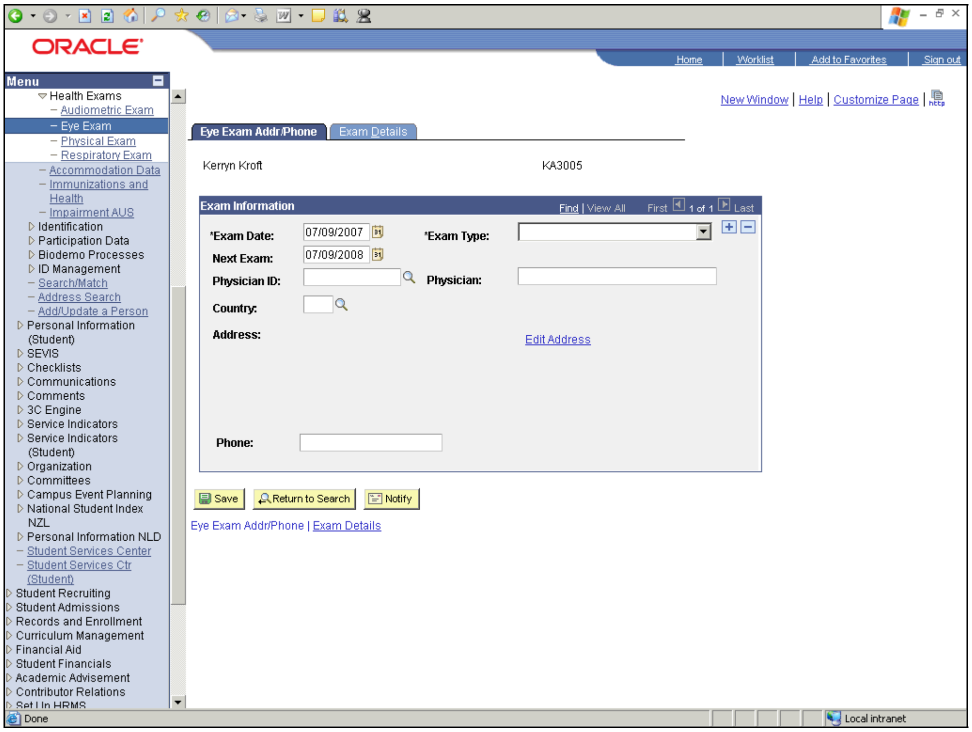
Step	Action
3.	Click the desired date. 9



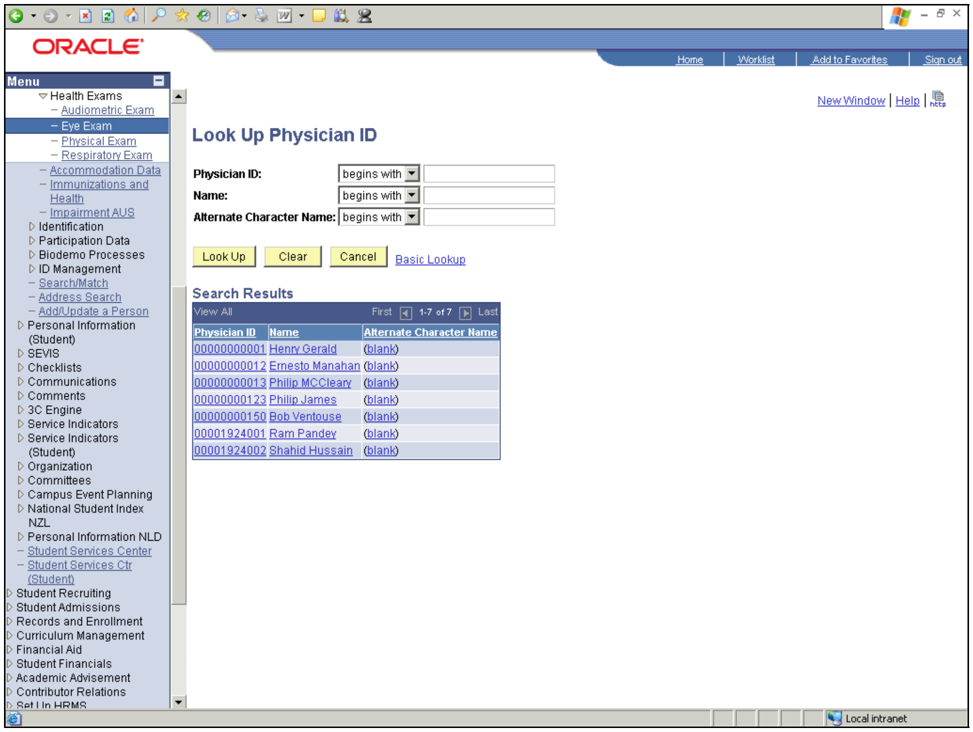
Step	Action
4.	The next exam will be one year from this exam. Click the **Choose Date** button. 



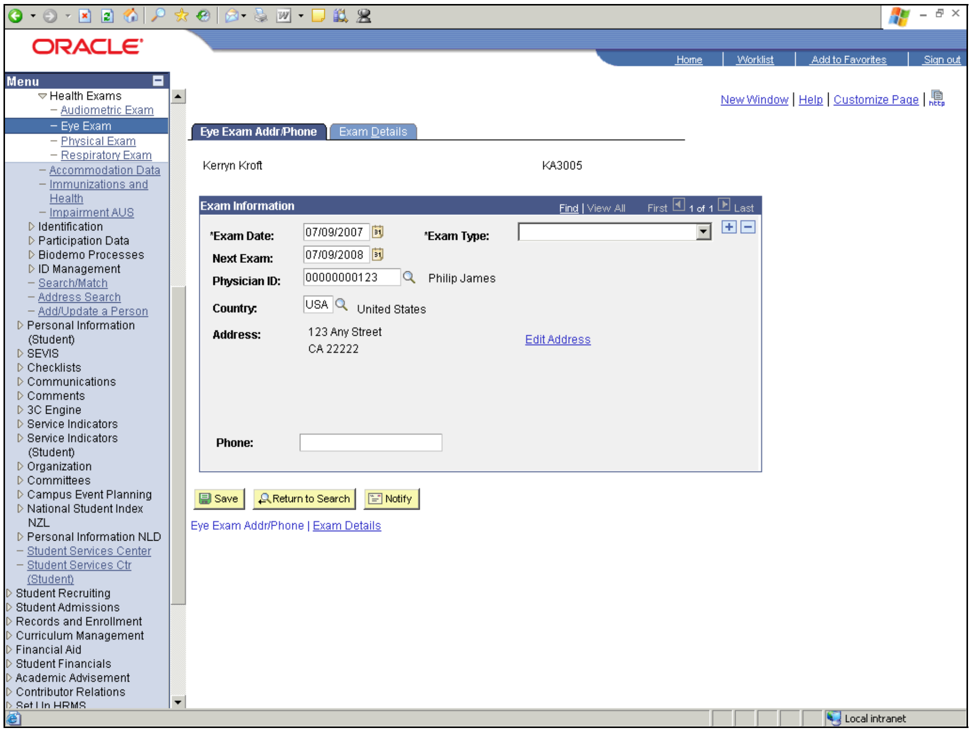
Step	Action
5.	Click the **Year** list. 2007
6.	Click the **2008** list item. 2008
7.	Click the desired date. 9

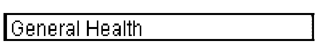
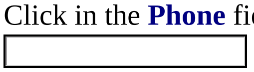


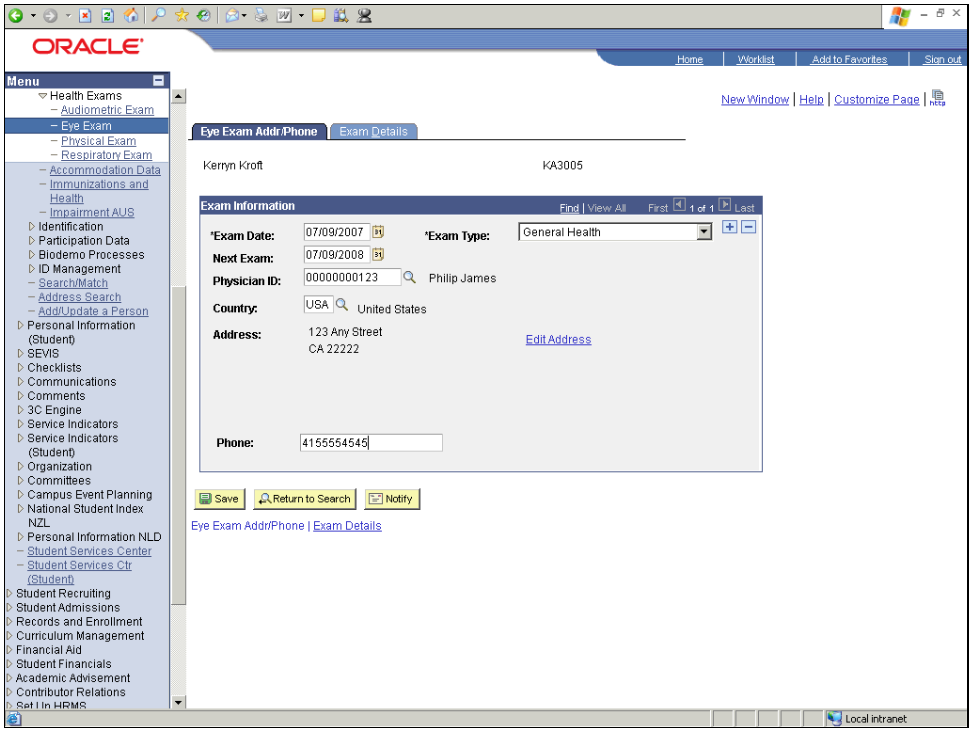
Step	Action
8.	An **edit box with prompt button** uses a **Lookup** button, which looks like a magnifying glass, and can be used to look up a valid value for the field. It opens a separate page that enables you to search the database for the data you need. Click the **Lookup** button. 



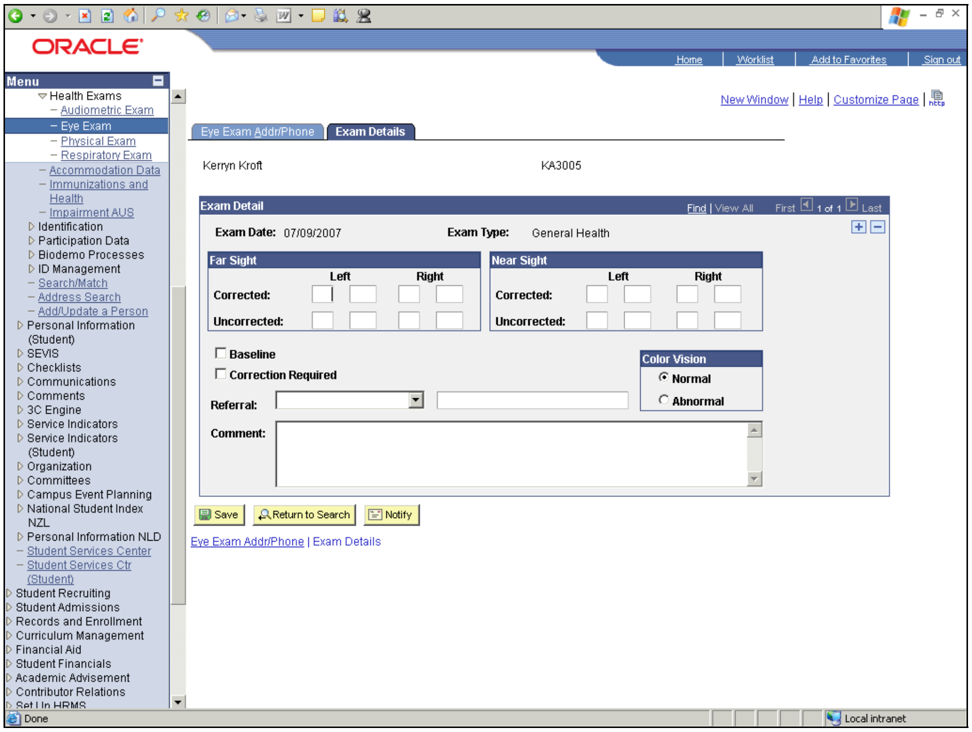
Step	Action
9.	The **Look Up** page displays a list of all the valid values for the field. In this example, the page displays a list of all the physicians in the database. Click the **Search Results** table. 
10.	After selecting a value, the system automatically returns you to the original page and inserts the information in the field.
11.	Based on the ID selected, the system also defaults the name and address information associated with this physician.



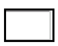
Step	Action
12.	A **drop-down list box** is a rectangular box similar to an edit box with a drop-down arrow within the box. Clicking the drop-down arrow displays a list of values from which you can select a single option. For this example, the type of exam is General Health. Click the **Exam Type** list. 
13.	Click the **General Health** list item. 
14.	An **edit box** is a rectangular box into which you enter data. The number of characters you can enter is determined by the length of the database field. For this example, you need to enter phone number information. Click in the **Phone** field. 
15.	Enter the desired information into the **Phone** field. Enter "**4155554545**".



Step	Action
16.	Click the **Exam Details** tab.



Step	Action
17.	The **Far Sight** and **Near Sight** group boxes contain additional **edit boxes**. In this example, you need to input the exam results, which are 20/20 vision in both cases. Click in the **Uncorrected** field.
18.	Enter the desired information into the **Uncorrected** field. Enter "**20**".
19.	Click in the **Left** field.
20.	Enter the desired information into the **Left** field. Enter "**20**".
21.	Click in the **Right** field.
22.	Enter the desired information into the **Right** field. Enter "**20**".
23.	Click in the **Right** field.

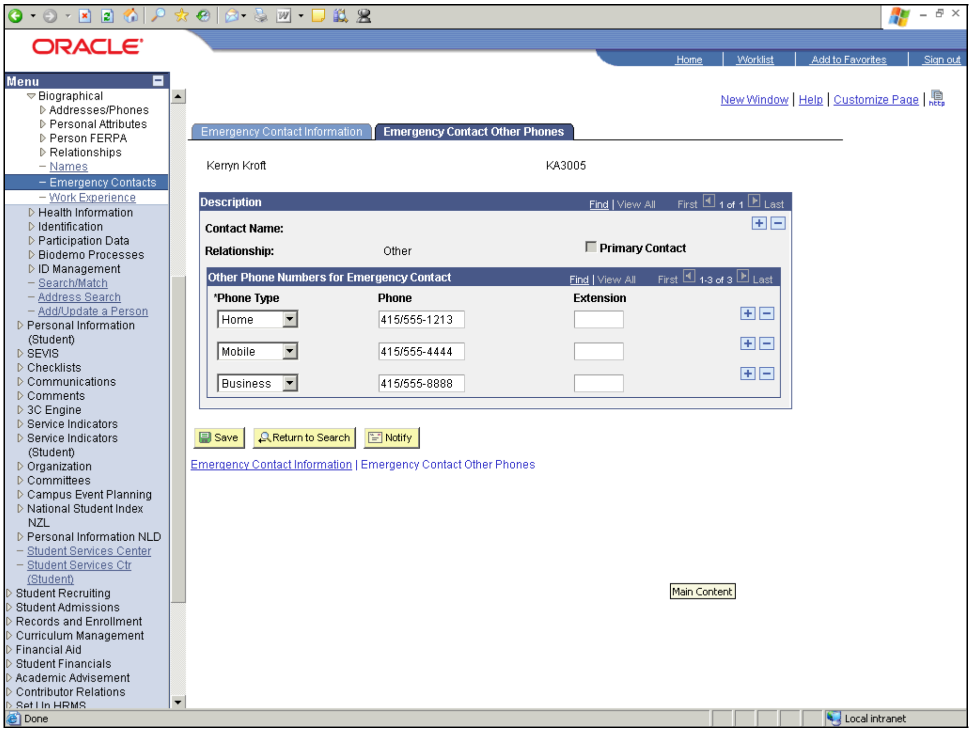
Step	Action
24.	Enter the desired information into the **Right** field. Enter "**20**".
25.	Click in the **Uncorrected** field. 
26.	Enter the desired information into the **Uncorrected** field. Enter "**20**".
27.	Click in the **Left** field. 
28.	Enter the desired information into the **Left** field. Enter "**20**".
29.	Click in the **Right** field. 
30.	Enter the desired information into the **Right** field. Enter "**20**".
31.	Click in the **Right** field. 
32.	Enter the desired information into the **Right** field. Enter "**20**".
33.	A **check box** is a small square box that turns an option on or off. Select the box to add a check mark and the option is on. Remove the check and the option is off. In this example, the **Baseline** and **Correction Required** check box options are off and you want to turn the **Baseline** check box on. Click the **Baseline** option. 
34.	A **radio button** is a small round button that represents one option in a group of mutually exclusive options. Only one radio button in a group can be selected at one time. For this example, you want to note that Kerryn's color vision is abnormal. Click the **Abnormal** option. 

Step	Action
35.	**Long edit boxes** are rectangular boxes into which you enter lengthy text items, such as comments. These boxes store free-form text fields. If you type more lines than you can see at one time, use the scroll bar to the right of the box to move through text. Click in the **Comment** field.
36.	Enter the desired information into the **Comment** field. Enter "**Kerryn has perfect vision, but is color blind.**".
37.	Click the **Save** button. 
38.	In summary, PeopleSoft data entry fields provide you with a simple way to enter and update data in your tables. **End of Procedure.**

Using PeopleSoft Grids

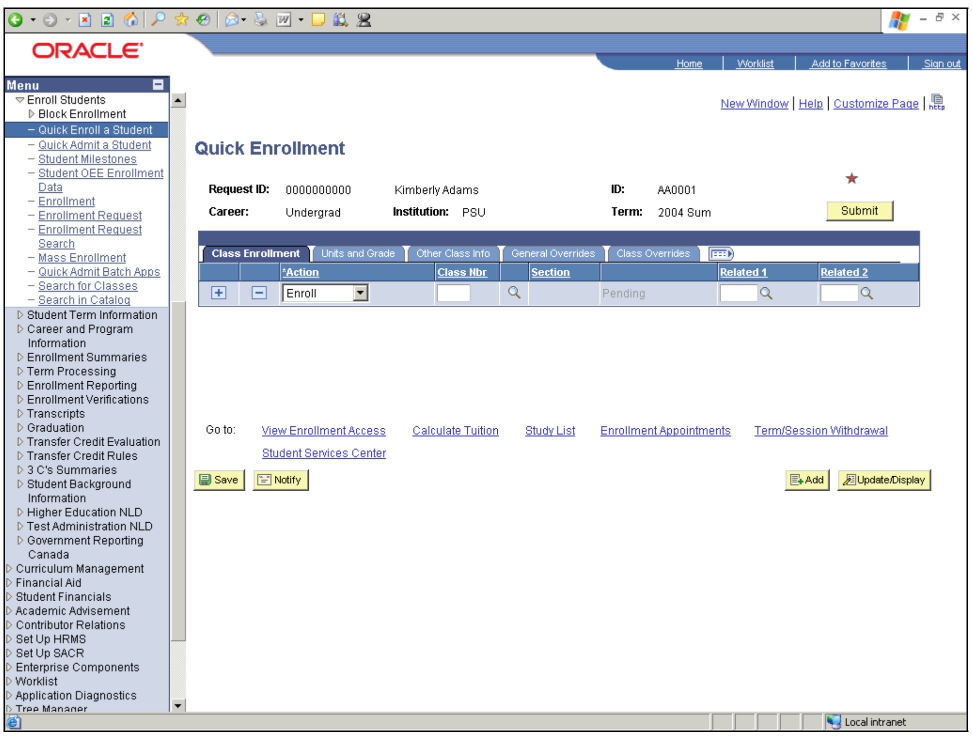
On some pages, you may want some of the fields to repeat in order to enter multiple rows of data. For this purpose, PeopleSoft uses **grids**. With grids, you have the ability to add, edit, and view multiple occurrences of data for a group of fields on one page.

Procedure



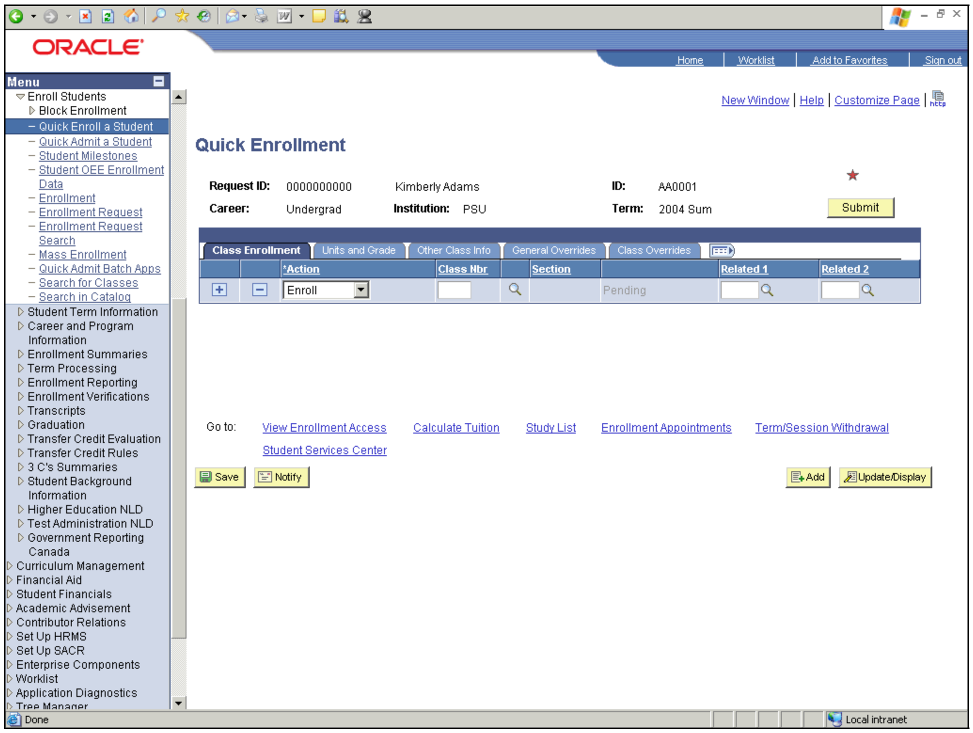
Step	Action
1.	On some pages, you may want some of the fields to repeat in order to enter multiple rows of data. For this purpose, PeopleSoft uses **grids**. With grids, you have the ability to add, edit, and view multiple occurrences of data for a group of fields on one page. The **Emergency Contact Other Phones** page in the **Emergency Contacts** component contains a grid area.
2.	Instead of using a traditional scroll bar to scroll through the rows of data in a grid, PeopleSoft uses navigation buttons and hyperlinks. Most often, you will find these buttons and hyperlinks in the **navigation header** for each area, with the exception of the **Insert Row** and **Delete Row** buttons.
3.	Use the **Find** link to find a specific row of data.
4.	Use the **View All** link to display all rows of data on a page. When this feature is enabled, the link changes to read **View 1**, so that you can return to the original setting.
5.	The **First** link takes you to the first row of data.
6.	Use the **Previous Row** arrow to navigate to the previous row of data.
7.	The number system for the rows shows the number of rows you are currently viewing.
8.	Use the **Next Row** arrow to navigate to the next row of data.
9.	The **Last** link takes you to the last row of data.

Step	Action
10.	The **Add Row** button inserts a new row of data.
11.	The **Delete Row** button deletes the current row of data.
12.	Grids look similar to a spreadsheet with **column headings**, **rows**, and **cells**. The cells are equivalent to fields. Fields within a grid may be represented as edit boxes, drop-down list boxes, check boxes, and radio or prompt buttons.
13.	Rows of data in grids and scroll areas alike always share the same high-level key(s). For example, for the **Emergency Contact Other Phones** page, you can have multiple rows for the different phone types. If you have multiple rows, each of these rows has the same **Person ID** as the key field. If you insert a new row, the system automatically copies the shared key data into the new row.

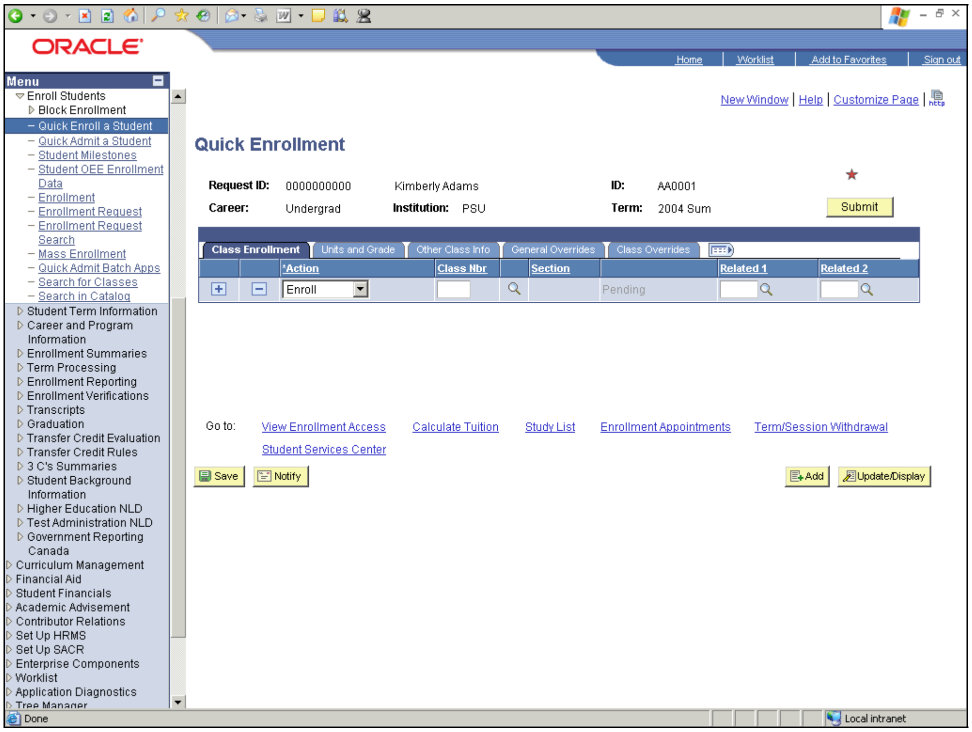


Step	Action
14.	Another type of grid is a **tabbed grid**. These grids provide a means of viewing multiple columns of information without having a horizontal scroll to view them. The **Quick Enrollment** component has a tabbed grid section. You select a tab to view the additional columns. Click the **Units and Grade** tab. Units and Grade

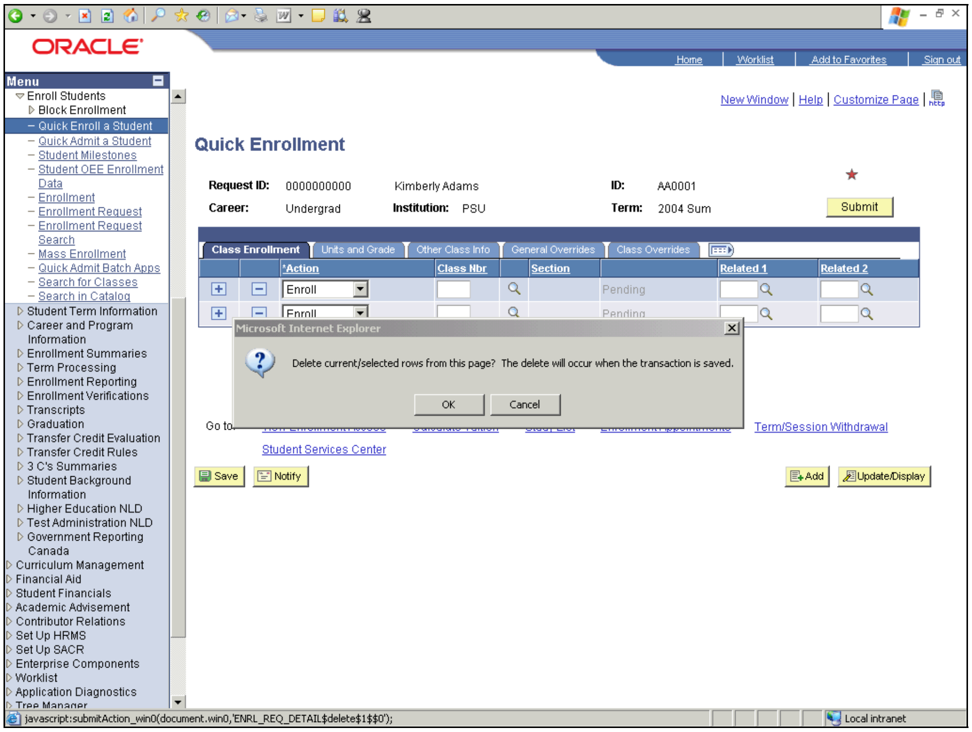
Step	Action
15.	Notice that different columns are displayed. Click the **Class Enrollment** tab. 



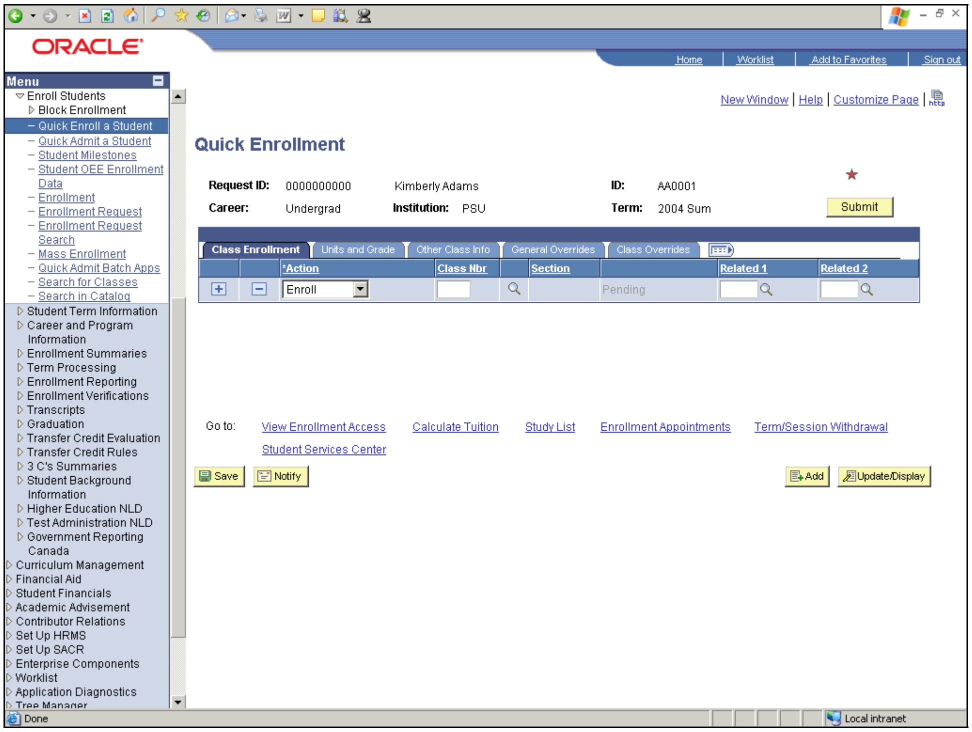
Step	Action
16.	Some tabbed grids have a button that can be used to expand the grid columns to the right so that tabs are no longer needed. Click the **Show Columns** button. 
17.	You can return to the tabbed view if desired. Click the **Show Tabs** button. 



Step	Action
18.	To add a new row of data to a grid, you click the **Add Row** button to insert a row just below the row you are on. Each time you add a new row, you are actually adding a new row of data to the database table. Click the **Add Row** button. 
19.	A new row is now available. If you want to delete a row, you click the **Delete Row** button. Click the **Delete Row** button. 



Step	Action
20.	The system displays a confirmation message asking if you want to proceed with the deletion. It also reminds you that the row will not be deleted from the database until a save occurs; however, the row is automatically removed from the grid. Click the **OK** button. OK



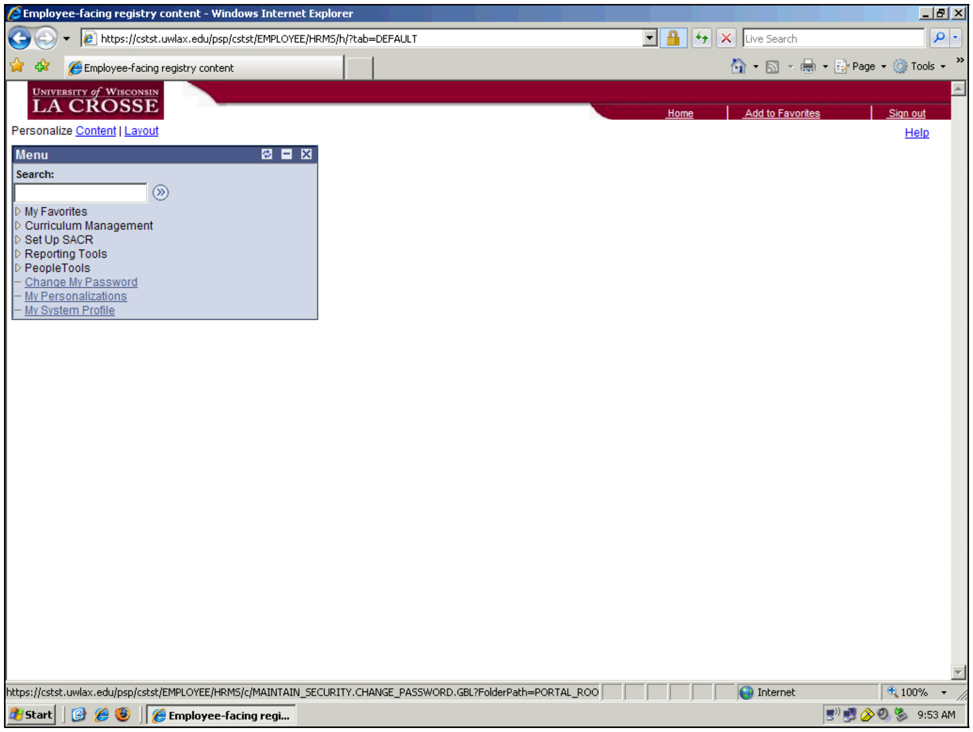
Step	Action
21.	To get the row to return, you can click the browser's **Back** button or close the transaction without saving your changes. If you close without saving, any other changes you made are not saved as well. Click the **Back** button. 
22.	The second row has now returned to the grid.
23.	In summary, PeopleSoft's grid area navigation structure makes it easy to work with multiple rows of data. **End of Procedure.**

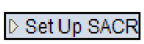
Setting User Defaults

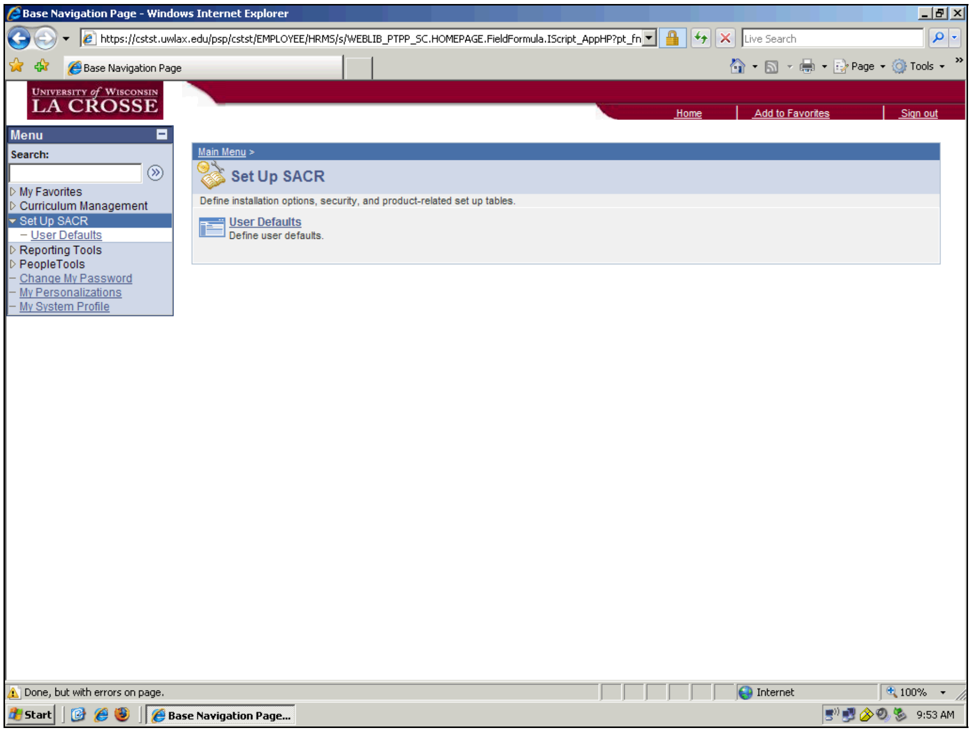
Procedure

User defaults (which are optional) can save time and minimize data entry errors. When you select default values for fields, you can select only those values for which the user ID has security access.

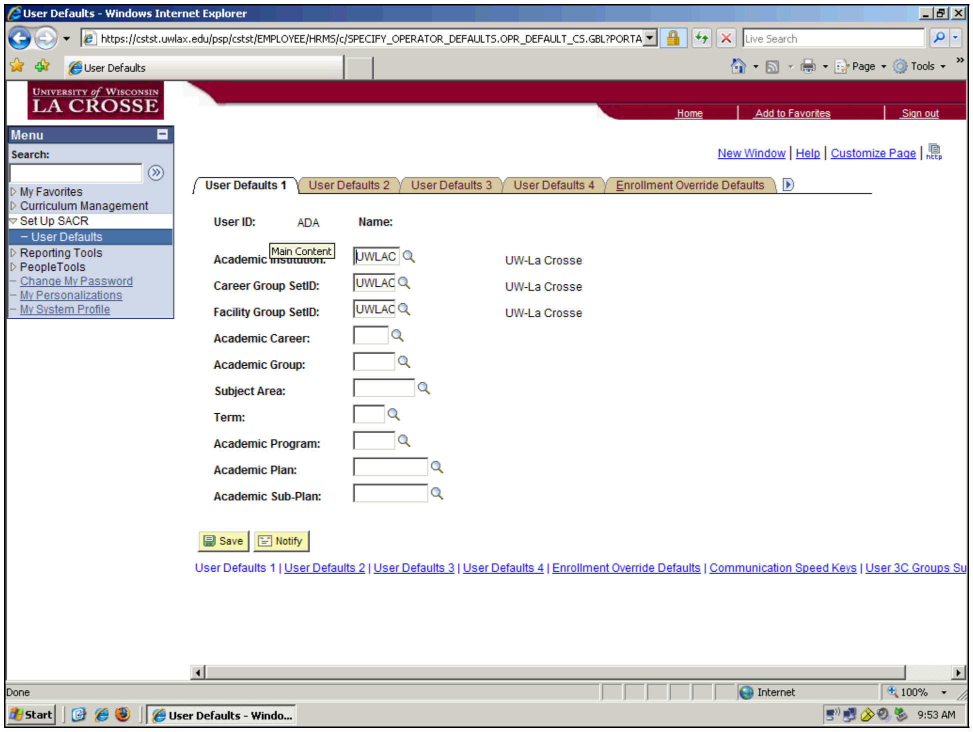
The system automatically loads default values into data pages for a particular user ID. The user default settings that you establish in the User Defaults component can be overridden on any page in the system.



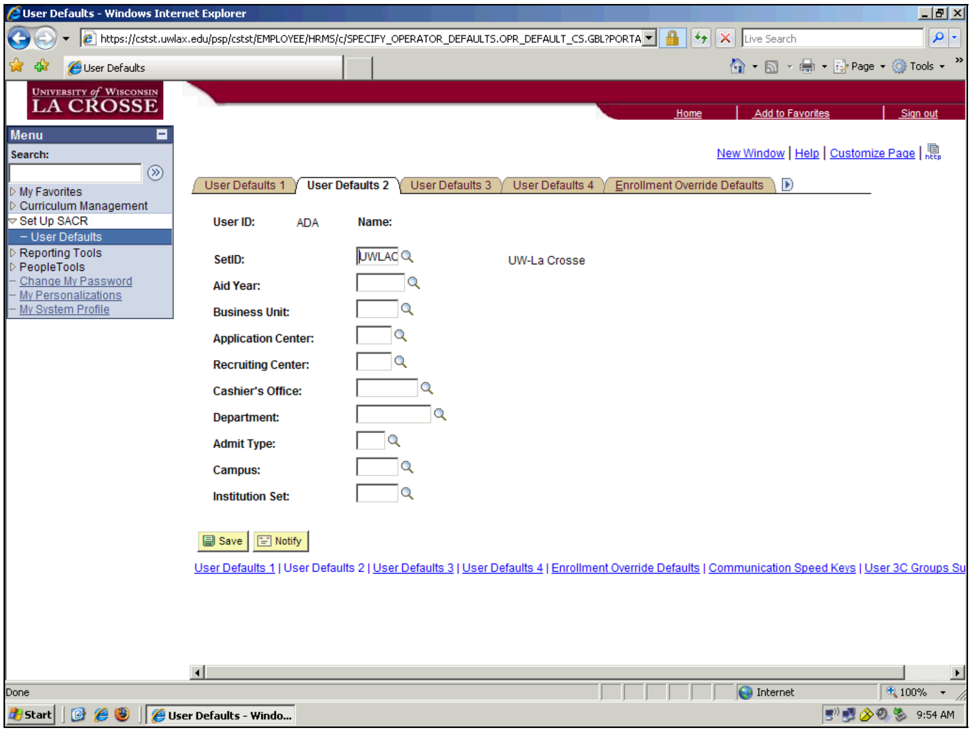
Step	Action
1.	Click the **Set Up SACR** link. 



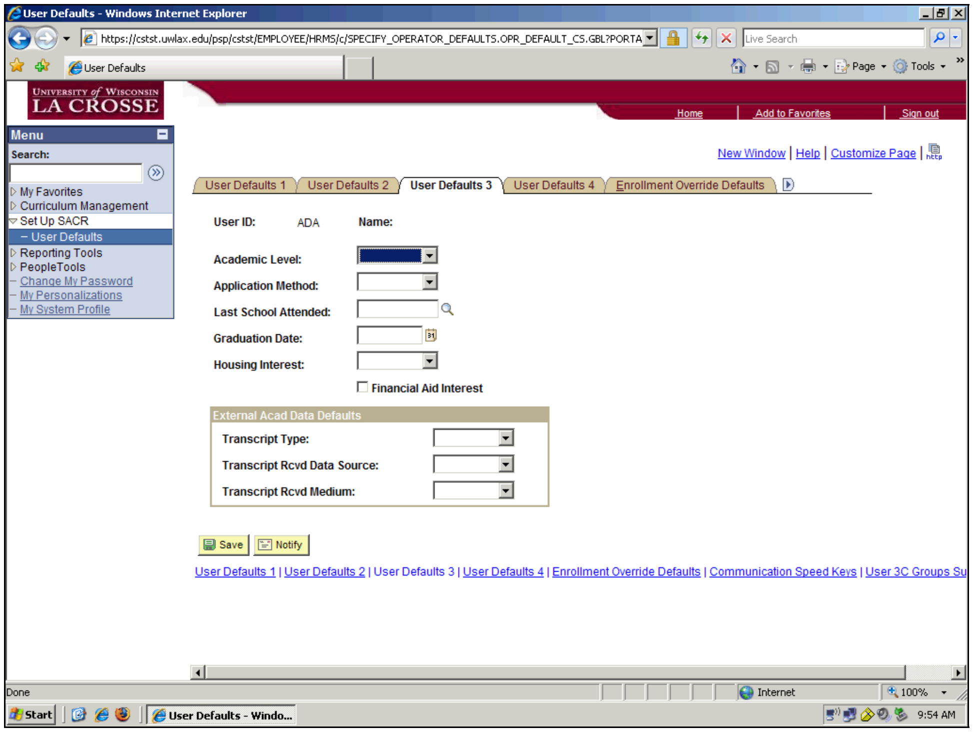
Step	Action
2.	Click the **User Defaults** link. User Defaults
3.	The User Defaults component has many pages to enter desired default values. All values are optional and only available if you have the appropriate security.



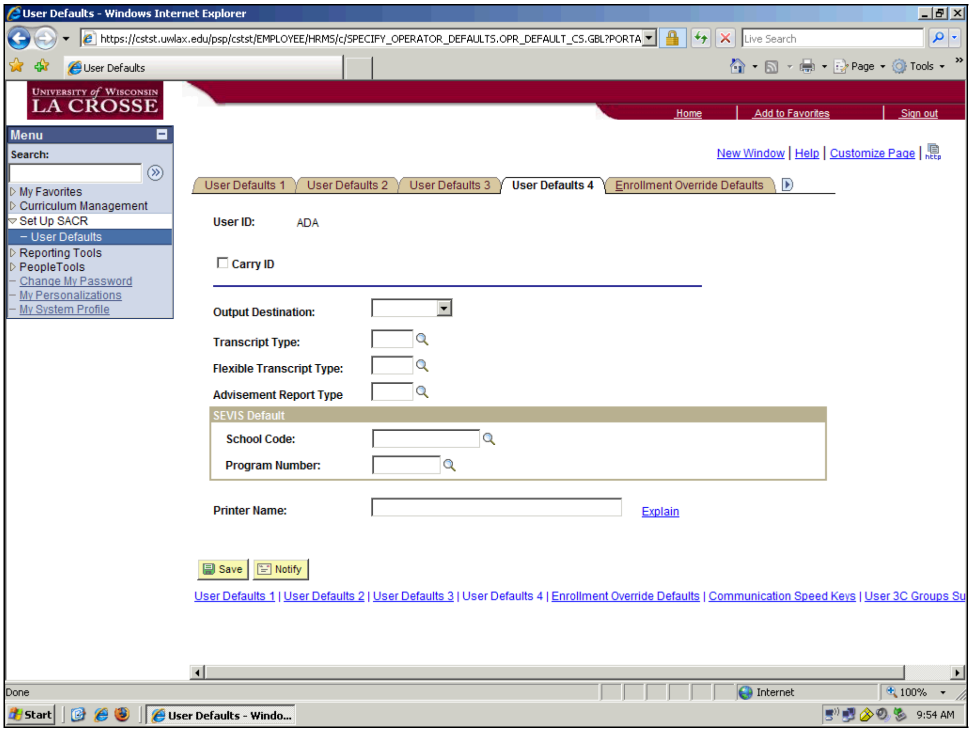
Step	Action
4.	The look up option allows you to see the default values available to you. Click an entry in the column. 
5.	In this example, you would like to set the default **Subject Area** to Accountancy. Click an entry in the **Description** column. Accountancy
6.	ACC (Accountancy) is now set as the default **Subject Area**. When accessing a page requesting a **Subject Area**, ACC will default in for you saving you time and reducing errors.
7.	Each page of the User Defaults components allows you to enter optional defaults. Select the defaults appropriate to your needs. Click the **User Defaults 2** tab. User Defaults 2



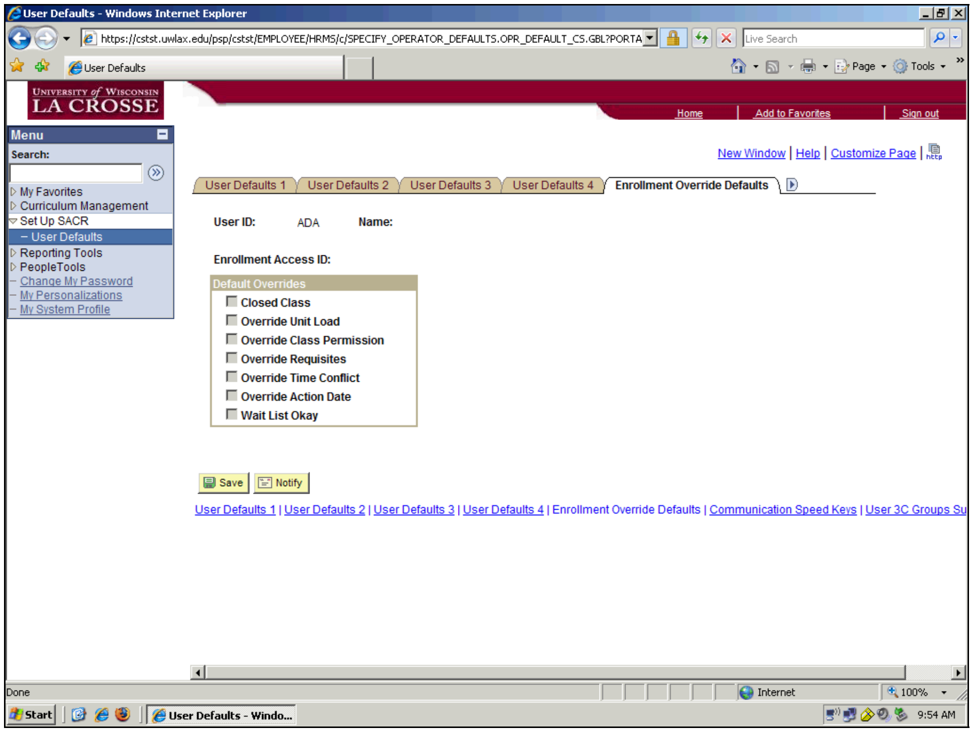
Step	Action
8.	Click the **User Defaults 3** tab. User Defaults 3



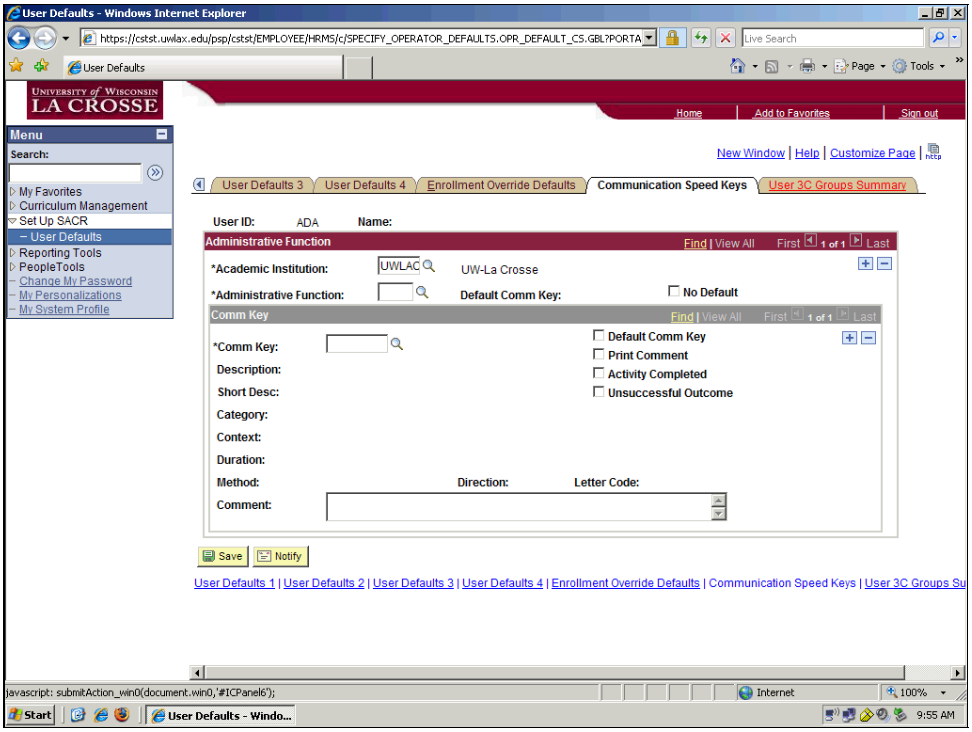
Step	Action
9.	Click the **User Defaults 4** tab. User Defaults 4
10.	If you will be regularly working with person IDs or organization IDs, the **Carry ID** option may be very useful. Select **Carry ID** to have the system carry the ID of the last entered (or selected) individual or organization from 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.



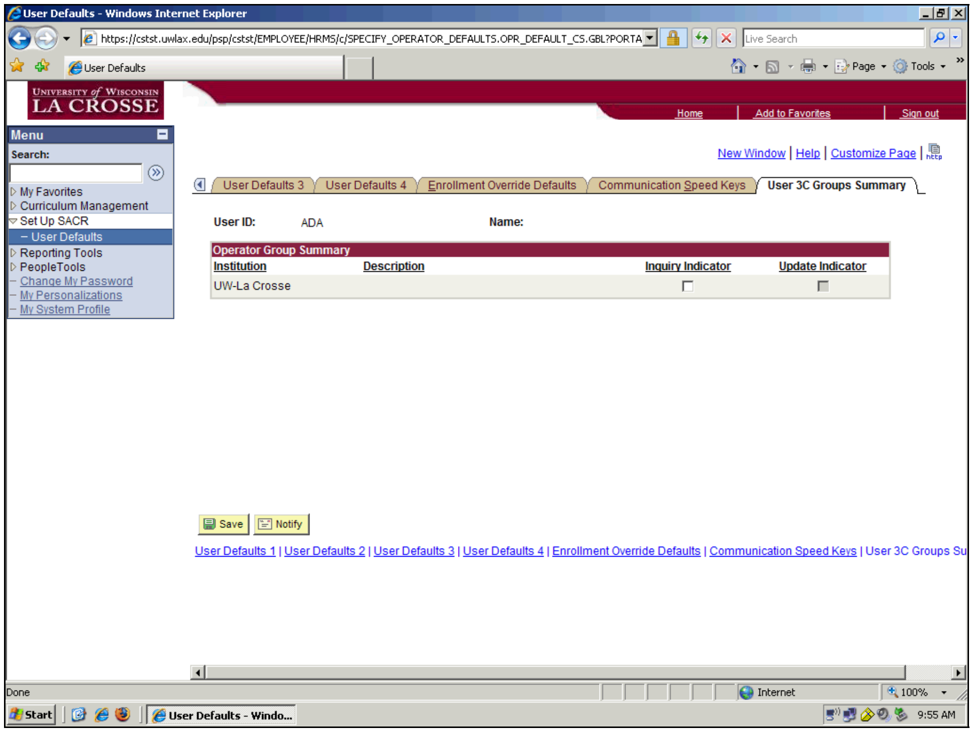
Step	Action
11.	Click the **Enrollment Override Defaults** tab. Enrollment Override Defaults

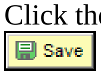


Step	Action
12.	To access the other pages within the User Defaults component, use the show following tabs button. Click the **Show following tabs** button. 
13.	The additional page tabs now appear. Click the **Communication Speed Keys** tab. Communication Speed Keys



Step	Action
14.	Click the **User 3C Groups Summary** tab. User 3C Groups Summary



Step	Action
15.	Remember to use the **Save** button after you have set your user defaults. Click the **Save** button. 
16.	User defaults can save you time and minimize data entry errors. Defaults can be changed at any time. **End of Procedure.**

Glossary

high-level key	The field in a row of data in a PeopleSoft database that uniquely identifies that row from the other rows in the database.
scroll areas	Areas where entry fields are arranged in a frame with a navigation bar or footer. Each row of data may contain Insert, Multi-Row Insert, and/or Delete buttons.