

Setting Defaults in URMA

Setting Defaults on Records and Files Tabs

- URMA no longer automatically populates information in the following fields:
 - Storage Type
 - Organization
 - Record Type
 - Primary Contact
- If you typically enter the same information in certain fields when creating Records and/or Files, you should Set Defaults for these fields.
 1. Start on the Create page for Records or Files.
 2. Enter information in the fields you wish to set as defaults.
 3. Click Set Defaults button at top/right.

Cancel Set Defaults Save & Close

Organization Name

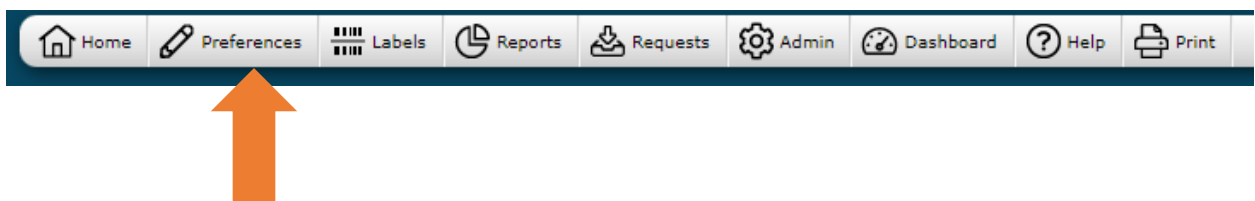
query. To search Organization, enter your criteria and click the Search button.

- Defaults can be:
 - Set on any field.
 - Updated/deleted using the procedure above.
 - Overridden by deleting text or using the Clear button in the fields you wish to change.

Setting a Default Current Location

- URMA no longer automatically assigns the creator as the Current Location for newly created Records and Files. This default must be set individually by each user on each tab.

Click Preferences.



Setting Defaults in URMA

Click Records and/or Files (only set Files default if you use the Files tab).


Data Tabs



Scroll to Default Current Location and click Search.

Preference Category 'Records'

Scope	Description	Value
User	Enable carry forward	Yes
System	Record field value changes in history	Yes
User	Default current location	<input type="text"/>



Enter your computing ID in the search field and click Search. Once the information populates, click OK.

Set Item Location

Enter a destination barcode or select an item from the grid: rec-man - Records Test Account

Computing ID	Role	First Name	Last Name
rec-man			

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Computing ID	Role	First Name	Last Name
<input checked="" type="radio"/> rec-man	cn=URMA-RecordsAdmin,ou=Groups,o=University of Virginia,c=US	Records	Test Account

Your user barcode will populate in the field.

User Default current location

Click Save Changes (top/right of screen).

Reminder – if you use the Files tab, you will need follow these instructions to set the default Current Location for that tab separately.