

## FMS Tip #6

### Setting Up Your Operator Preferences

To save time you can set your operator preferences so that you do not need to reenter common information such as Business Unit, System Source, Analysis Type, etc.

1. Navigation Path (on the left side menu):
  - Set Up Financials/Supply Chain
  - Common Definitions
  - User Preferences
  - Define User Preferences
2. Enter your User ID and click **Search**.
3. Click **Overall Preferences** and fill in the fields as shown in Figure 1 (substituting your name in the Name field and the current date in the As of Date field).

<b>User ID:</b>	MMCLARY
<b>Name:</b>	Clary, Mary
<b>Business Unit:</b>	LBNL  Lawrence Berkeley National Lab
<b>SetID:</b>	LBNL  Lawrence Berkeley National Lab
<b>As of Date:</b>	07/24/2000 
<b>Localization Country:</b>	USA  USA
<input type="checkbox"/> <b>Alternate Character Enabled</b>	
<input type="checkbox"/> <b>Display Debit/Credit Amounts in Subsystems</b>	

Figure 1 – Overall Preferences

4. Click **Save** and then click back to the **User Preferences** tab.

5. Click **Project Costing** and complete the fields as shown in Figure 2.

The screenshot shows the 'Project Costing Preferences' form. At the top, there are tabs for 'User Preferences' and 'Projects'. The 'User ID' is MMCLARY and the 'Name' is Clary, Mary. The form is divided into two main sections: 'Data Entry Defaults' and 'Date Default Values'. The 'Data Entry Defaults' section includes fields for Tree Name, Tree Effective Date, Parent Tree Node, Analysis Group (ACT), Currency Code (USD), Unit of Measure (UNT), Project Business Unit (LBNL), Project, Integration (LBNL), Rate Type (CRRNT), Flexible Analysis Template, and Edit Project List Option. The 'Date Default Values' section includes From Date and Through Date fields.

Figure 2 – Project Costing Preferences

6. Click **Save** and then click the to the **User Preferences** tab.
7. Click **Procurement**.
8. Complete the fields as shown in Figure 3 substituting your room number in the Location field.

The screenshot shows the 'Procurement Preferences' form. The 'User' is MMCLARY and the 'Name' is Clary, Mary. The 'Location' is 937-0510 (Cubicle Office). The 'Origin' is ONL (Online Entry). The 'Department' is empty. The 'Ship To Location' is 069-0150 (LBNL MAIN RECEIVING). The 'Requester Name' and 'Buyer' fields are empty.

Figure 3 – Procurement Preferences

9. Click **Save** and then click back to the **User Preferences** tab.

10. Click the **General Ledger** link.
11. Complete the fields as shown in Figure 4 (substituting your division’s Source in the Source field). See the page 3 for a list of Division Source Codes.

**Ledger:** ACTUALS LBNL Actuals Ledger

**Ledger Group:** ACTUALS Actuals

**Source:** DCF Resource Adjustments - CFO

**Journal Entry Options**

- Change Date on Correction Journals
- Use Next Journal ID
- Change Journals from Journal Generator
- Enter Adjustment Type Journal
- Save Journal Incomplete Status

**Online Journal Edit Defaults**

- Re-Edit Previously Edited
- Mark Journal(s) to Post
- Recalc Currency Exchange Rates

**Journal Post Defaults**

- Skip Open Item Reconciliation
- Skip Summary Ledger Update

**Budget Post Options**

- Skip Entry Event processing

Figure 4 – General Ledger Preferences

12. Click **Save**.

You have now completed setting your User Preferences.

**Division Source Codes for Resource Adjustments**

<b>Organization:</b>	<b>Identifier</b>
Accelerator & Fusion	DAF
Administration, Operations, Directorate	DLD
Advanced Light Source	DAL
Chemical Sciences	DCH
Chief Financial Officer	DCF
Earth Sciences	DES
Environmental Energy Technologies	DEE
Engineering	DEG
Environmental, Health and Safety	DEH
Facilities	DFA
Genomics	DGN
Human Resources	DHR
Internal Audit & General Lab	DOP
Computing Sciences	DCS
Life Sciences	DLS
Material Sciences	DMS
Nuclear Science	DNS
Physics	DPH
Physical Biosciences	DSB