Exercise 1: Personalize user options

You want to personalize your user options to automatically use the **USRT** legal entity when you sign in to Finance and Operations. You also want to change the color theme to green, and set the initial page to **Employee self-service**, set the time zone to **(GMT-08:00) Pacific Time (US & Canada)**, and assign **SMTP** for the email provider.

Finally, because you will be out of office you need to delegate one of the workflows to another user.

1. Go to **Settings > User options**.
2. In the **Color theme** field, enter **'Green'**.
3. In the **Size** field, enter **'Compressed'**.
4. Click the **Preferences** tab.
5. In the **Company** field, type **'usrt'** and press the Tab key.
6. In the **Initial page** field, select **'Employee self service'**.
7. In the **Time zone** field, select **(GMT-08:00) Pacific Time (US & Canada).**
8. Click the **Account** tab.
9. In the **Email provider ID** field, enter or select **SMTP**.
10. Click the **Workflow** tab.
11. Select **Yes** in the **Send notifications in email** field.
12. Expand the **Delegation** section.
13. Click **Add**.
14. In the **Scope** field, select '**Workflow**'.
15. In the **Name** field, enter or select a workflow.
16. In the **Delegate** field, enter or select a user.
17. In the **Start date/time** field, set the date and time to 01/01/2019.
18. In the **End date/time** field, set the date and time to 01/04/2019.
19. Click **Save**.
20. Close the page.

Exercise 2: Create and use a record template

You need to create a new record for new laptops that should be added to your fixed assets in the USMF sample company.

In this exercise, you will

- Create a record template.
- Use record template to create a new record.

Create a record template

1. Go to **Fixed assets > Fixed assets > Fixed assets**.
2. Click **New**.
3. In the **Fixed asset group** field, select a value.
4. In the **Name** field, enter **'Corporate lead laptop'**.
5. In the **Search name** field, enter **'laptop**.'
6. Expand the **Technical information** section.
7. In the **Make** field, type a value.
8. In the **Model** field, type a value.
9. In the **Model year** field, type a value.
10. On the **Action Pane**, click **Options**.
11. Click **Record info**.
12. Click **User template**.
13. In the **Name** field, enter **'Corporate laptop**.'
14. In the **Description** field, enter **'Corporate laptop'**.
15. Click **OK**.
16. Click **Close**.

Use a record template to create a new record

1. Go to **Fixed assets > Fixed assets > Fixed assets**.
2. Click **New**.
3. You will be prompted to select a template. Select the one that corresponds to your business need.
4. In the list, find and select a record.
5. Click **OK**.