



# Quercus 8

QuercusPlus

System Administrator's Guide to Application Roles

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## Document information

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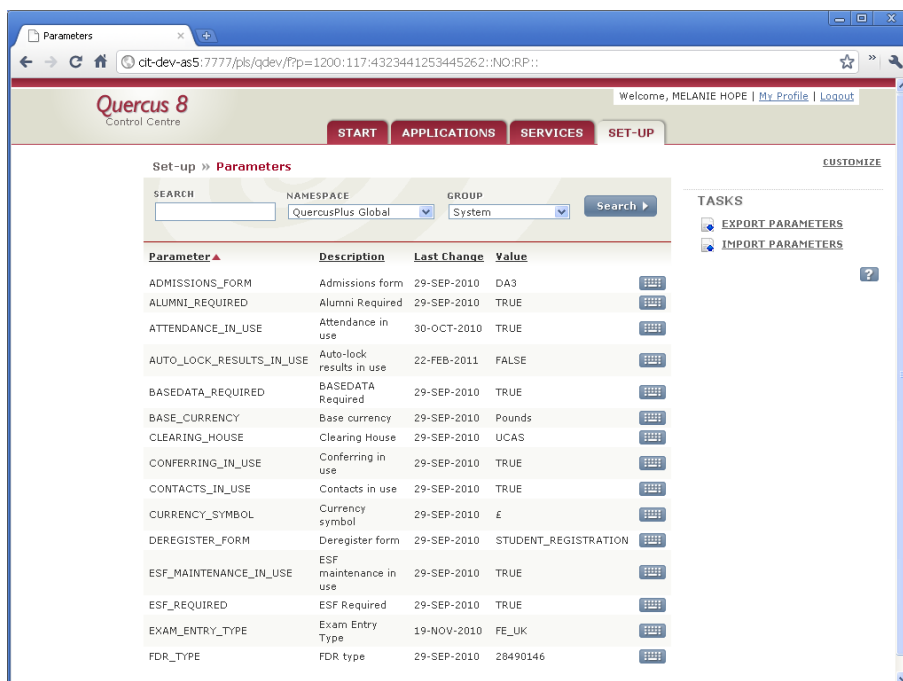
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# 1 System parameters

## 1.1 System parameters now accessed through the Control Centre

System parameters are now (since version 8.0) managed through the Control Centre Parameters option:

- Namespace: QuercusPlus Global
- Group: System



► For more information see the *Quercus Parameters Reference Guide*.

## 1.2 Effect of QuercusPlus Global parameters on the menu options

Some menu options are turned on or off by the Quercus Plus Global parameter settings within the through the Quercus Plus Control Centre.

The effect of the various parameters is given below.

Parameter	Function/Settings
ALUMNI_REQUIRED	specifies whether the various features accessible through the Graduate menu relating to the maintenance of alumni details are required
ATTENDANCE_IN_USE	specifies whether Attendance options are available on the Records menu
BASE_CURRENCY	specifies the default currency for transactions e.g. POUNDS
BASEDATA_REQUIRED	specifies whether basedata functionality for UK exam boards is required
CLEARING_HOUSE	specifies which set of clearing house (UCAS or CAO) options appear on the Admissions menu
CONTACTS_IN_USE	specifies whether Contact options are available on the Records menu

Parameter	Function/Settings
EXAM_ENTRY_TYPE	makes the Exam Entry Results, Load Exam Entry Defaults, Exam Timetable and Mark Ready for Exam menu options visible. options are FE_UK, NCEA or NONE
GIROS_IN_USE	specifies whether the Giros options are available in the Fees/Sponsorship menu
HEA_REQUIRED	specifies whether HEA options are available in the Returns Management menu (Ireland only)
HESA_REQUIRED	specifies whether HESA options are available in the Returns Management menu
ISR_REQUIRED	specifies whether the options relating to individualised Student Record (ISR) or Individualised Learner Record (ILR) will appear on the Returns Management menu
M_AND_S_IN_USE	specifies whether Marks and Standards are available in the Progression menu
MENTORS_IN_USE	specifies whether Mentors options are available on the Records menu
NCEA_REQUIRED	specifies whether HETAC exam board functionality is required, e.g. the HETAC Exams menu
RESIDENTIAL_STATUS_IN_USE	Switches on the residential status functionality in rapid enrolment, registration and maintain student. Enforces linkage between Residential Status, Student Fee Category and Student Category.
TOKARIO_IN_USE	specifies whether the Tokario Export option is available on the Records > Export menu
UFI_IN_USE	specifies whether UFI options are available in the Records menu
WBL_IN_USE	specifies whether Work Based Learning options will be available in the Records menu

In the *Menu access by application role* chapter (p.14) , menu options switched on or off by the switches listed above are shown with a light brown background. The relevant parameter is shown on the right of the menu option.

In the example below the Basedata Maintenance option is switched on or off by the BASEDATA\_REQUIRED parameter.

Course Manager	
Qualification Entry	
Course Maintenance	
Module Maintenance	
Course Rollover	
Qualification Maintenance	
Basedata Maintenance	BASEDATA_REQUIRED
Document Maintenance	
Marketing Document	
Registration Check Defaults	
Reports	
Course Structure	

## 2 Understanding application roles

---

### 2.1 What are application roles?

The Quercus system is designed for use by different groups of users within your institution's environment. For example academic staff, admissions and registration personnel, clerical staff, course administrators and finance personnel.

Each of these groups may require access to different parts of the system. In addition, groups may not be allowed to access data records outside their specific area.

To manage this requirement Quercus provides a number of *application roles*. An application role specifies which screens a role-member can access within the QuercusPlus Classic Interface and which options he or she can access.

### 2.2 Security and application roles

Application roles work in conjunction with LDAP roles and the Quercus content-based access control within the Quercus security model.

- **application roles** control what screens you can access in Quercus Classic Interface
  - **LDAP roles** control what operations (e.g. view, update, delete) you can perform on the data
  - **content-based access control** determines what data you can access (e.g. only the data from my courses, only the data from my organisation, all data)
- See the *Online Results Entry Administrator's Guide* and the *Quercus Plus Menu Guide* for more information about LDAP roles and content-based access control. A summary is given below.

#### 2.2.1 LDAP role-based access control

Role-based access is controlled by the user's membership of LDAP groups:

- If a user is a member of QP\_RESULTS\_ENTRY the user is authorised to enter results.
- If a user is a member of QP\_RESULTS\_VIEW the user is authorised to view results.

#### 2.2.2 Quercus content-based access control

If Quercus's content-based access control is implemented then a user's access to results can be restricted to particular courses and students:

- If the *person model* is implemented then a staff member can only access the results relating to course instances or modules with which he or she is associated.
- If the *organisation model* is implemented then a staff member can only access the results of students belonging to the organisation of which he or she is a member.
- If the *unrestricted model* is implemented then a staff member can access the results of any students on any course.

### 2.3 Using this guide

This guide is divided into two main sections:

- *Setting up users*, p.7 describes how to set up users and allocate roles to users.
- *Menu access by application role*, p.14 lists the various user roles and the corresponding menu options that are granted to a user who is a member of the role.

## 3 Setting up users

### 3.1 QuercusPlus and Oracle

Before a person can become a QuercusPlus user, he or she must first be set up as an user for the Oracle QuercusPlus database.

### 3.2 User set up methods

You can set up users using either:

- Oracle Enterprise Manager
- SQL Plus command line utility

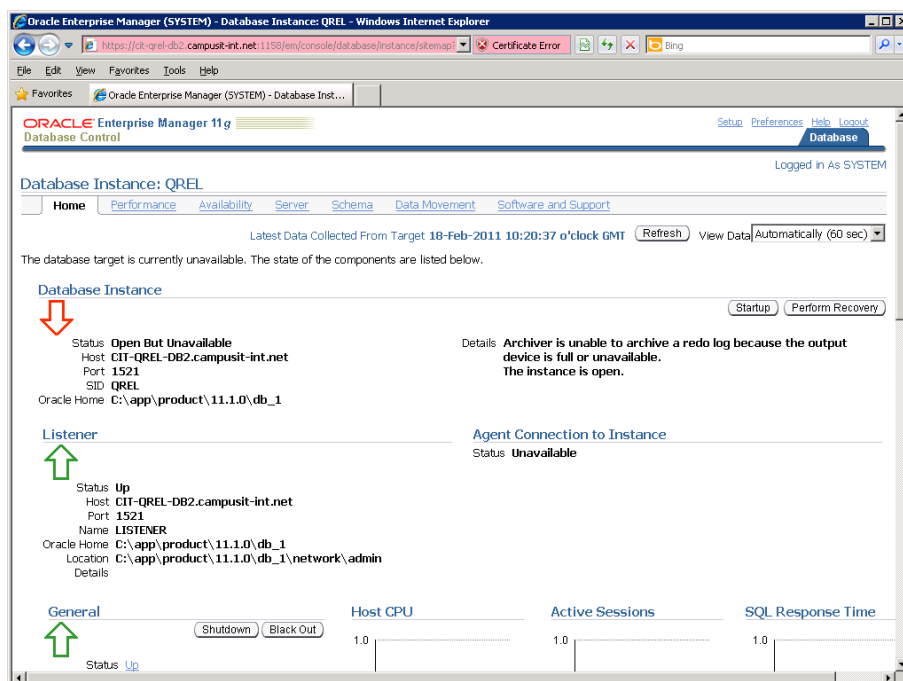
The Oracle Enterprise Manager is the more user-friendly method. It is also the best choice if you want to check all the settings that relate to an individual user.

The SQL Plus command line utility is faster for bulk operations. If you plan to add many users at the same time, and these users fall into groups sharing the same access requirements then consider using SQL Plus rather than Enterprise Manager.

### 3.3 Setting up users using Oracle Enterprise Manager

#### 3.3.1 The Enterprise Manager

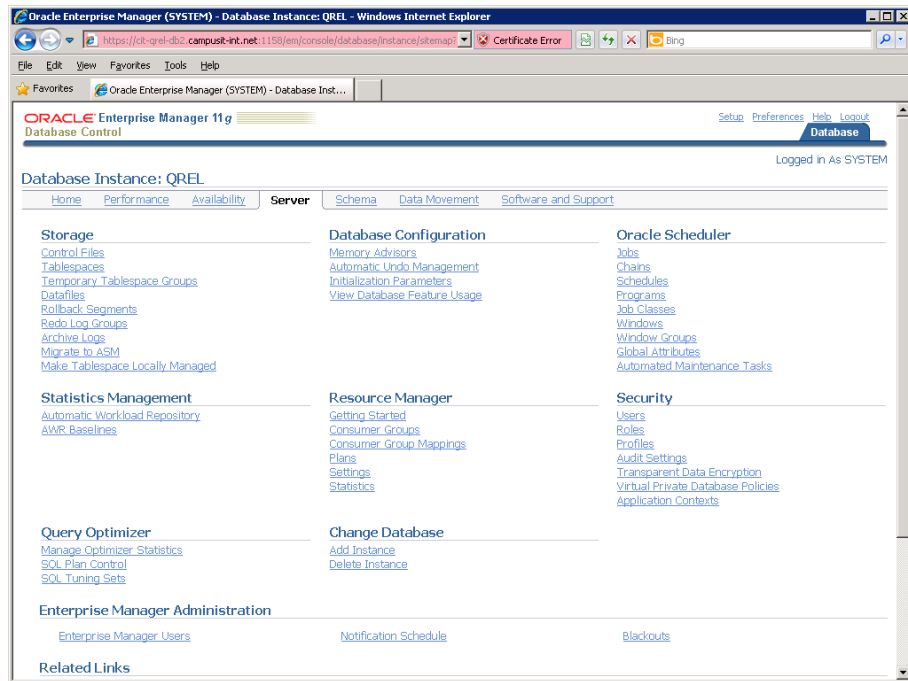
The Oracle Enterprise Manager is a database administration console which allows you to manage all aspects of your database set up as well as providing a range of diagnostic utilities and performance indicators. It has a standard Windows-style user-interface. It provides a graphical alternative to the SQL Plus utility for a variety of database administrative operations.



**Note:** The user interface in Oracle Enterprise Manager differs slightly from version to version. The screenshots below are from Oracle 11g Release 1.

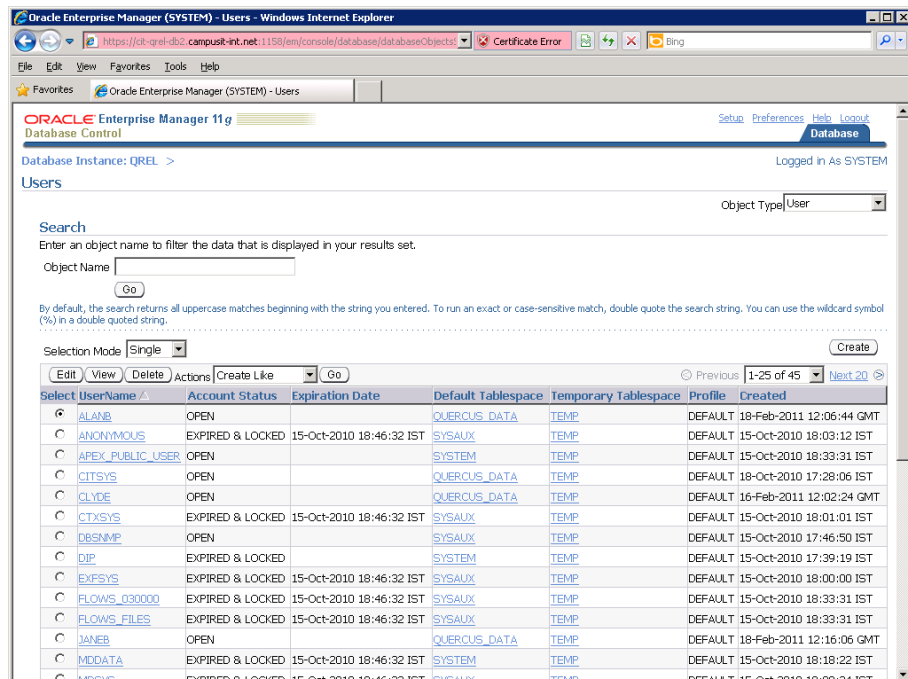
**To create a user using Enterprise Manager**

- 1 Open the Enterprise Manager and and connect to the Quercus database.
- 2 Click the Sever tab.



- 3 Under Security choose Users.

A list of users opens.

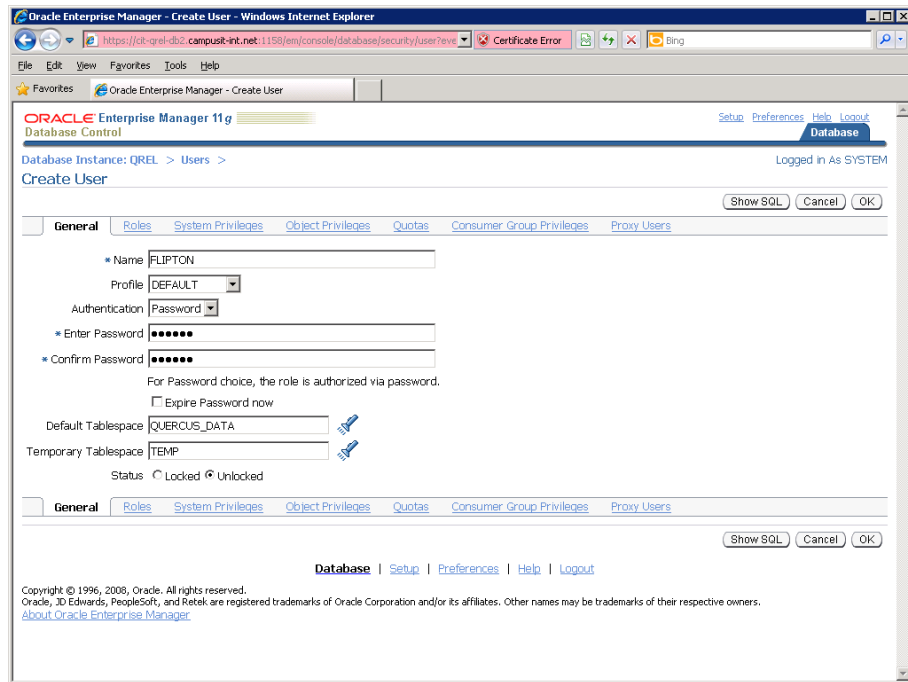


- 4 Click the Create button at the top right of the list.

The Users screen opens on the General tab.

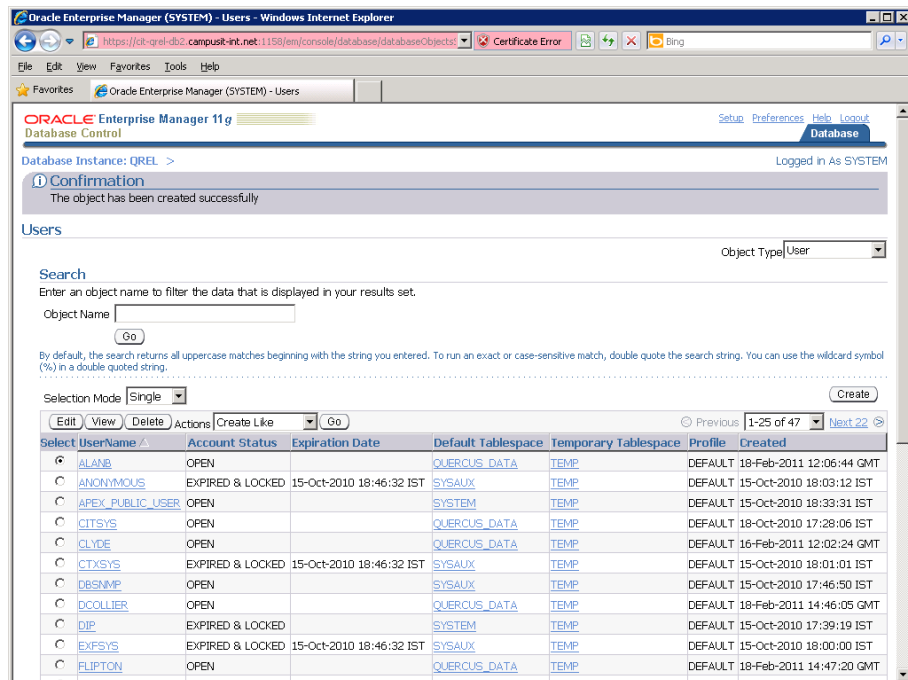


5 Complete the screen by entering the new user's details.



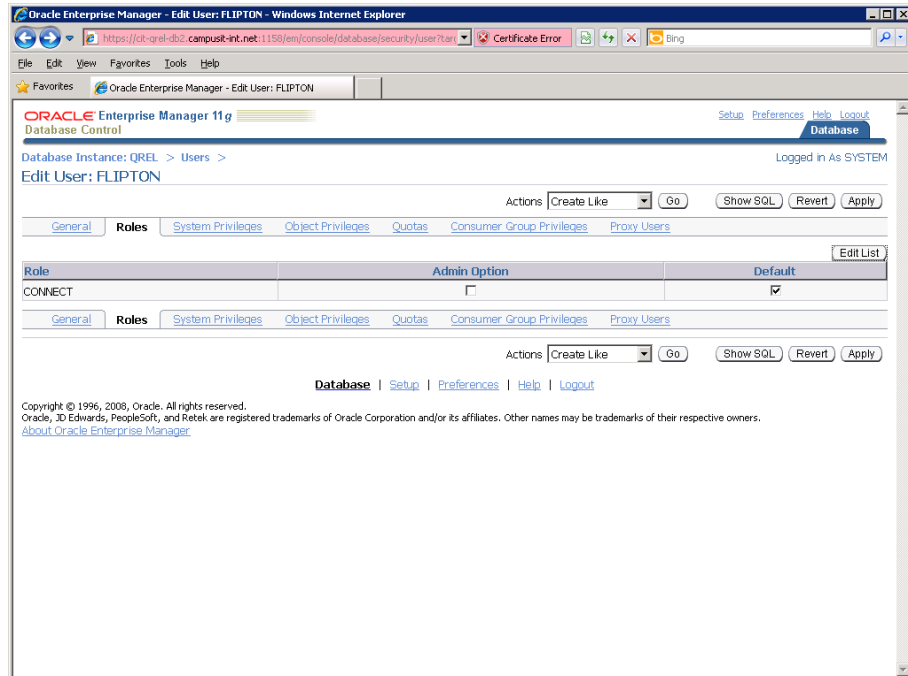
6 Click OK to create the user.

You are returned to the list screen of users. A message appears confirming that the user has been created and the user appears in the list.

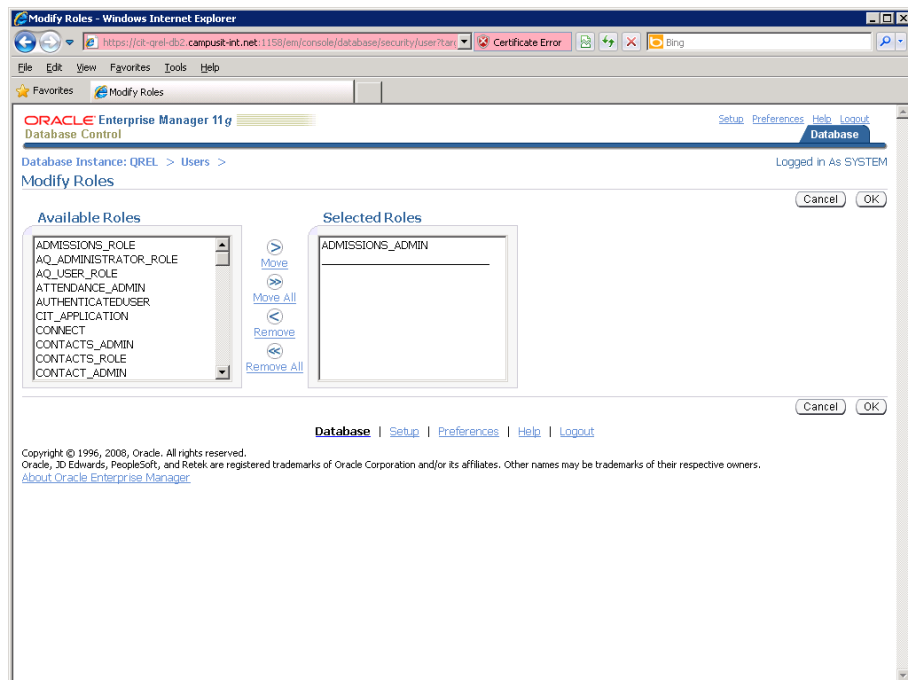


### To assign roles to a user using Enterprise Manager

- 1 Select a user in the user list and click Edit.  
The user's profile opens.
- 2 Click the Roles tab to view a list of the user's current roles.

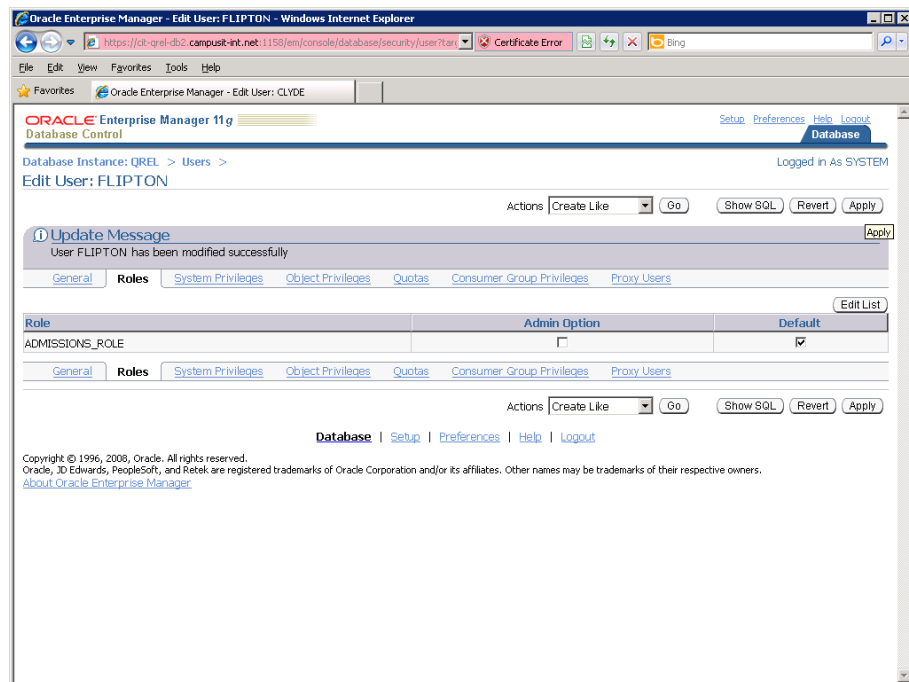


- 3 To edit the user's roles click the Edit List tab.  
The Modify Roles screen opens allowing you to select which roles are assigned to the user.  
Use the Move and Remove controls to choose which roles you want to assign to the user.



- 4 Press OK when you have finished selecting roles.  
You are return to the Roles tab.
- 5 Click the Apply button to apply the selected roles to the user.

A message appears confirming that the user's record has been modified.



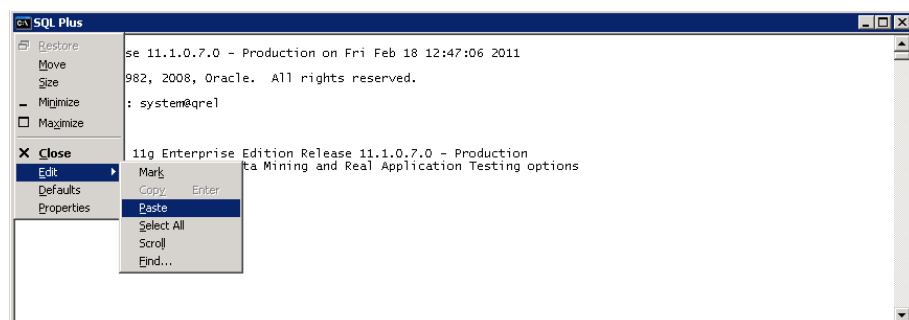
## 3.4 Setting up users using SQL Plus

### 3.4.1 The SQL Plus utility

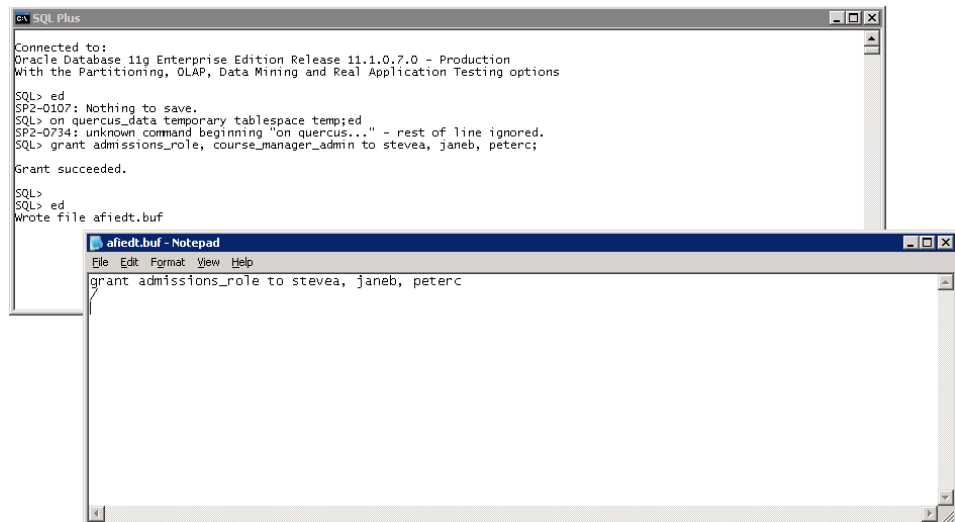
The SQL Plus utility is a command-line utility similar to the command prompt in Windows or the terminal utility in Unix or Linux systems.

Note the following:

- Commands must be ended by a semi-colon ( ; )
- You can prepare a command by typing it in a text editor such as Windows Notepad and then pasting it into the SQL Plus window using the Edit > Paste command from the SQL Plus menu.



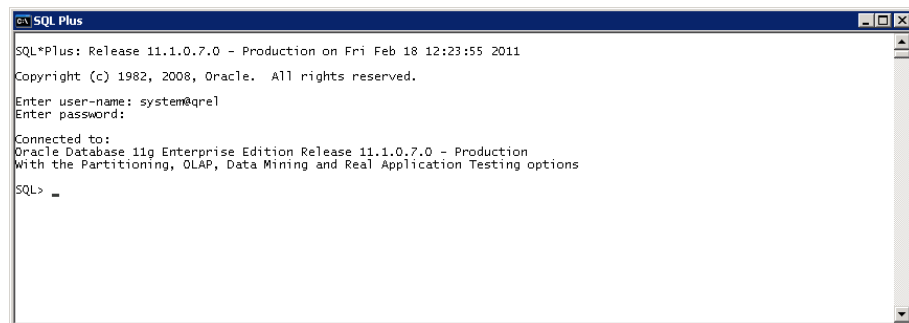
- You can edit and modify the previous command by typing 'ed' after the command prompt. This opens the buffered command in a text editor.



Modify the command as required and then save the modified buffer when you exit the text editor. Then type a forward slash ( / ) to execute the modified command.

### To create a user using SQL Plus

- Open the SQL command-line utility and connect to the Quercus database.



Enter:

```

create user [username]
identified by [password]
default tablespace [default tablespace]
quota [quota] on [default tablespace]
temporary tablespace [temporary tablespace];

```

Example:

```

create user mhope
identified by hu42Stew
default tablespace quercus_data
quota 10m on quercus_data
temporary tablespace temp;

```

- Press Return.

If the command has executed successfully you will receive a 'User Created' message.

```

c:\SQL Plus
SQL*Plus: Release 11.1.0.7.0 - Production on Fri Feb 18 12:47:06 2011
Copyright (c) 1982, 2008, Oracle. All rights reserved.
Enter user-name: system@qrel
Enter password:
Connected to:
Oracle Database 11g Enterprise Edition Release 11.1.0.7.0 - Production
With the Partitioning, OLAP, Data Mining and Real Application Testing options
SQL> create user mhope
2 identified by hu42STew
3 default tablespace quercus_data
4 quota 10m on quercus_data
5 temporary tablespace temp;
User created.
SQL> _

```

### To assign roles to users using SQL Plus

**1** Enter:

```
grant [role 1], [role 2], ... [role n] to [user 1], [user 2] ... [user n];
commit;
```

Examples:

```
grant quercus_user to mhope;
grant admissions_role, course_manager_admin to dbradshaw, msmith;
```

**2** Press Return.

### To revoke roles from users using SQL Plus

**1** Enter:

```
revoke [role 1], [role 2], ... [role n] from [user 1], [user 2] ... [user n];
```

Examples:

```
revoke quercus_user from mhope;
revoke admissions_role, course_manager_admin from dbradshaw, msmith;
```

**2** Press Return.

### To delete a user using SQL Plus

**1** Enter:

```
drop user [username];
```

Example

```
drop user mhope;
```

## 4 Menu access by application role

### 4.1 Purpose of this section

This section lists the various user roles (titles shown in **RED**) and the various menu options that are granted to a user who is a member of the role. Unavailable options are shown in grey. Options switched on or off by the switches listed above are shown with a light brown background. The relevant parameter is shown on the right of the menu option.

In the example below the Basedata Maintenance option is switched on or off by the BASEDATA\_REQUIRED parameter.

Course Manager	
Qualification Entry	
Course Maintenance	
Module Maintenance	
Course Rollover	
Qualification Maintenance	
Basedata Maintenance	BASEDATA_REQUIRED
Document Maintenance	
Marketing Document	
Registration Check Defaults	
Reports	
Course Structure	

### 4.2 Access to menus by application roles

<b>ADMISSIONS_ADMIN</b>	
File	
Run Form	
Exit	
Admissions	
Enquiry	
Static Data	
Enquiry Type	
Enquiry Action	
Source of Enquiry	
-----	
Field of Study	
Enquiry Mode of study	
Enquiry Classification	
CAO	CLEARING_HOUSE = CAO
Rate CAO File	CLEARING_HOUSE = CAO
CAO College Evaluations	CLEARING_HOUSE = CAO
-----	CLEARING_HOUSE = CAO
Course Rating Rules	CLEARING_HOUSE = CAO
Zero Rating Ranges	CLEARING_HOUSE = CAO
Matric Requirements	CLEARING_HOUSE = CAO
-----	
Static Data	
Subject Maintenance	
Rating type	
-----	
CAO Text Type	
CAO Exam Type	
CAO File	
CAO Grade	
CAO Category	
-----	
Subject Group	
Matric groups	
Matric Subjects	
Application Number Ranges	
Subject Group Maintenance	

```

-----
Static Data
  Check Type
  Application Type
  School Type
  -----
  Religion
  Occupation
  Letters
  -----
  Socio Economic Group
  Economic Grouping
  -----
  Interview Type
  -----
  County
  Country
  Nationality
  Ethnic Grouping
  Study Rationale
window
  Cascade
  Tile Horizontally
  Tile Vertically
  
```

```

ADMISSIONS_ROLE
File
  Run Form
  Exit
Admissions
  UCAS
  CAO
  UCAS Import
  CAO/CAS Import
  -----
  Enquiries and Ratings
  Rate CAO File
  -----
  CAO College Evaluations
  Export Ratings
  -----
  Course Rating Rules
  Zero Rating Ranges
  Martric Requirements
  -----
  Reports
    CAO Category
    CAO Category Labels
Direct Admissions
  Direct Admission Maintenance
  Schedule Appointment
  Appointments
  -----
  Make Offer/Change Status
  -----
  Accept Offer
  -----
  School Maintenance
Reports
  College Application Details
  Applicant Stats Report
  -----
  Letters
  Batch Email/Ad Hoc Letters
  Address Labels
window
  Cascade
  Tile Horizontally
  Tile Vertically
  
```

**ATTENDANCE\_ADMIN**

```

File
  Run Form
  Exit
Admissions
  []
Records
  -----
  Medal Detail
window
  Cascade
  Tile Horizontally
  Tile Vertically

```

**CONTACTS\_ADMIN**

```

File
  Run Form
  Exit
Records
  -----
  Medal Detail
window
  Cascade
  Tile Horizontally
  Tile Vertically

```

**CONTACTS\_ROLE**

```

File
  Run Form
  Exit
Records
  -----
  Medal Detail
window
  Cascade
  Tile Horizontally
  Tile Vertically

```

**COURSE\_MANAGER\_ADMIN**

```

File
  Run Form
  Exit
Course Manager
  Course Rollover
  Marketing Document
  Static Data Maintenance
  Mode of Study
  Module Type
  Document Type
  Document Template
  Module Group
  Module Level
  Publicity Type
  Group Type
  -----
  Department Maintenance
  Faculty Maintenance
  Division Maintenance
  Location Maintenance
  -----
  Course Year
  Course Level
  Course Stream
  -----
  Award
  Assessment
  Assessment Type
  Target Type
Progression Manager
  Exam Timetable EXAM_ENTRY_TYPE = NCEA or None
window
  Cascade
  Tile Horizontally
  Tile Vertically

```



### COURSE\_MANAGER\_ROLE

File	Run Form	
	Exit	
Course	Manager	
	Qualification Entry	
	Course Maintenance	
	Module Maintenance	
	Course Rollover	
	Qualification Maintenance	
	Basedata Maintenance	BASEDATA_REQUIRED
	Document Maintenance	
	Marketing Document	
	Registration Check Defaults	
	Reports	
	Course Structure	
Window		
	Cascade	
	Tile Horizontally	
	Tile Vertically	

### ENQUIRIES\_ROLE

File	Run Form	
	Exit	
Enquiry	Course Enquiry	
	Record Enquiry	
	Follow Up Enquiry	
	-----	
	Reports	
	Enquiry Labels	
	Enquiry Letters	
	Enquiries with Follow Up	
	Outstanding Enquiries	
	Course Available on Day	
Window		
	Cascade	
	Tile Horizontally	
	Tile Vertically	

### FDR\_ADMIN

File	Run Form	
	Exit	
Graduates	HEA FDR	ALUMNI_REQUIRED
	Static Data	ALUMNI_REQUIRED
	Award Level	ALUMNI_REQUIRED
	Classification	ALUMNI_REQUIRED
	Country	ALUMNI_REQUIRED
	Course	ALUMNI_REQUIRED
	Employment Sector	ALUMNI_REQUIRED
	Faculty	ALUMNI_REQUIRED
	Group of Study	ALUMNI_REQUIRED
	Institute	ALUMNI_REQUIRED
	Occupation	ALUMNI_REQUIRED
	Origin	ALUMNI_REQUIRED
	Nationality	ALUMNI_REQUIRED
	Region	ALUMNI_REQUIRED
	Salary	ALUMNI_REQUIRED
Window		
	Cascade	
	Tile Horizontally	
	Tile Vertically	

FDR_ROLE		
File	Run Form Exit	
Graduates	HEA FDR Maintain FDR	ALUMNI_REQUIRED ALUMNI_REQUIRED ALUMNI_REQUIRED
Window	Cascade Tile Horizontally Tile Vertically	

FEES_ADMIN		
File	Run Form Exit	
Fees/Sponsorship	Fees	
	Instalment Template	
	Static Data Maintenance	
	Fee Parameters	
	Fee Category Maintenance	
	Fee Type	
	Fee Level	
	-----	
	Payment Type	
	Update Type	
	-----	
	Financial Transaction Type	
	-----	
	Financial Exports File Layout	
	Course Financials Link	
	Finance Link Template	
	Student Loan Company	
Sponsorship	Sponsorship Maintenance	
	Static Data Maintenance	
	Grant Authority	
	Funding Type	
	Invoice Status	
	Student Finance	
Window	Cascade Tile Horizontally Tile Vertically	

FEES_ROLE		
File	Run Form Exit	
Fees/Sponsorship	Fees	
	Student Account Enquiry	
	Aged Debt	
	Batch Update Student Fee Category	
	-----	
	Course Fee Maintenance	
	Module Fee Maintenance	
	Transaction Processing	
	ICGP Allocate Payments	ICGP_IN_USE
	Transaction Batch Processing	
	Suspense Account	
	Debit Student Fees	
	Instalment Template	
	-----	
	Allocate Giro Numbers	GIROS_IN_USE
	Student Giro	GIROS_IN_USE
	-----	
	Imports/Exports	
	Bank Imports	
	Financials Exports	
	-----	
	Reports	
	Print Statements	
	Daily Receipt	
	ICGP Batch Reports	ICGP_IN_USE
	ICGP Create New Invoice	ICGP_IN_USE
	ICGP Reprint Invoice	ICGP_IN_USE
	Daybook	
	Course Fee Analysis	

	-----	
	Control Account Analysis	
	ICGP Aged Debtors Report	ICGP_IN_USE
	ICGP Aged Debtors Analysis Breakdown	ICGP_IN_USE
	Exported Batches	
	-----	
	Student Fee Analysis	
	Fees Report	
	Fees Letters	
	Student Loan Company	
	Sponsorship	
	Sponsorship Maintenance	
	Maintain Sponsors Invoice	
	-----	
	Reports	
	Print Statements	
	Reports	
	Student Finance	
	Student Finance	
	Fund Maintenance	
Window	Cascade	
	Tile Horizontally	
	Tile Vertically	

**GRADUATE\_ADMIN**

File	Run Form	
	Exit	
Graduates	Static Data Maintenance	ALUMNI_REQUIRED
	Mailing List	ALUMNI_REQUIRED
	Mailing List Item	ALUMNI_REQUIRED
	Venue	ALUMNI_REQUIRED
	Venue Type	ALUMNI_REQUIRED
	Venue Detail	ALUMNI_REQUIRED
Window	Cascade	
	Tile Horizontally	
	Tile Vertically fortune87	

**GRADUATE\_ROLE**

File	Run Form	
	Exit	
Graduates	Conferring	ALUMNI_REQUIRED
	[ ]	CONFERRING_IN_USE
	HEA FDR	ALUMNI_REQUIRED
	[ ]	ALUMNI_REQUIRED
	Mailing List	ALUMNI_REQUIRED
Window	Cascade	
	Tile Horizontally	
	Tile Vertically	

**PROGRESSION\_ADMIN\_ROLE**

File	Run Form	
	Exit	
Course Manager	Marketing Document	
Progression Manager	Exam Timetable	EXAM_ENTRY_TYPE = NCEA or None
	Static Data Maintenance	
	Assessment Sitting	
	Assessment Period	
	Assessment Static Data	
	Grade	
	Result Entry Level	
	Award Body	
	Centre Number Details	
	Edexcel Mode of Study	
	Edexcel Vocational Select	
Window	Cascade	
	Tile Horizontally	
	Tile Vertically	

PROGRESSION_USER_ROLE		
File	Run Form	
	Exit	
Progression Manager	Results Enquiry	
	Exam Timetable	EXAM_ENTRY_TYPE = NCEA or None
	Assessment Management	
	Results Entry	
	Exams Pre-Entry Maintenance	
	Exam Entry Management	
	Award Year Calculator	
	-----	
	Overall Grade Management	
	Module Grade Maintenance	
Import Results	Results Import	
Progression Control	Marks and Standards	M_AND_S_IN_USE
	-----	
	Examination Security	
	Grade Scheme	
	Marks and Standards Defaults	
	Exam Entry Defaults	
	-----	
	Exam Board	
End of Year Procedures	<input type="checkbox"/>	
HETAC Exams	HETAC Submissions	NCEA_REQUIRED
	HETAC Accs Submissions	NCEA_REQUIRED
	HETAC Export	NCEA_REQUIRED
Reports	Exam Timetable	
	Sign-in Sheet	
	Mark Sheet	
	Mark Entry Sheet	
	Broadsheet	
	Notice Board List	
	Transcript	
	Certificate	
	Progression Manager Letters	
Window	Cascade	
	Tile Horizontally	
	Tile Vertically	

**QUERCUS\_USER**

File	System Parameters	
	Maintain Operators	
	ICGP Parameters	ICGP_IN_USE
	-----	
	Output Objects	
	Report Parameters	
	Report Parameters Required	
	Run Form	
	Static Data	
	Output Type	
	Output Note Type	
	Transaction Type	
	Exit	
Admissions	Enquiry	
	Course Enquiry	
	Record Enquiry	
	Follow Up Enquiry	
	-----	
	Reports	
	Enquiry Labels	
	Enquiry Letters	
	Enquiries with Follow Up	
	Outstanding Enquiries	
	Courses Available on Day	
	-----	
	Static Data	
	Enquiry Type	
	Enquiry Action	
	Source of Enquiry	
	-----	
	Field of Study	
	Enquiry Mode of Study	
	Enquiry Classification	
	UCAS	CLEARING_HOUSE = UCAS
	UCAS Import	CLEARING_HOUSE = UCAS
CAO	CAO/CAS Import	CLEARING_HOUSE = CAO
	-----	CLEARING_HOUSE = CAO
	Enquiries and Ratings	CLEARING_HOUSE = CAO
	Rate CAO File	CLEARING_HOUSE = CAO
	-----	CLEARING_HOUSE = CAO
	CAO College Evaluations	CLEARING_HOUSE = CAO
	Export Ratings	CLEARING_HOUSE = CAO
	-----	CLEARING_HOUSE = CAO
	Course Rating Rules	CLEARING_HOUSE = CAO
	Zero Rating Ranges	CLEARING_HOUSE = CAO
	Matric Requirements	CLEARING_HOUSE = CAO
	-----	CLEARING_HOUSE = CAO
	Reports	CLEARING_HOUSE = CAO
	CAO Category	CLEARING_HOUSE = CAO
	CAO Category Labels	CLEARING_HOUSE = CAO
	Static Data	CLEARING_HOUSE = CAO
	Subject Maintenance	CLEARING_HOUSE = CAO
	Rating type	CLEARING_HOUSE = CAO
	-----	CLEARING_HOUSE = CAO
	CAO Text Type	CLEARING_HOUSE = CAO
	CAO Exam Type	CLEARING_HOUSE = CAO
	CAO File	CLEARING_HOUSE = CAO
	CAO Grade	CLEARING_HOUSE = CAO
	CAO Category	CLEARING_HOUSE = CAO
	-----	CLEARING_HOUSE = CAO
	Subject Group	CLEARING_HOUSE = CAO
	Matric groups	CLEARING_HOUSE = CAO
	Matric Subjects	CLEARING_HOUSE = CAO
	Application Number Ranges	CLEARING_HOUSE = CAO
	Subject Group Maintenance	CLEARING_HOUSE = CAO
	-----	
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	Direct Admissions Maintenance	
	Schedule Appointment	
	Appointments	
	-----	
	Make offer/Change Status	
	-----	
	Accept Offer	
	-----	
	School Maintenance	
Reports	College Application Details	
	Applicant Stats Report	
	-----	
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	Batch Email/Ad Hoc Letters	
	Address Labels	

Static Data	Check Type	
	Application Type	
	Application Check Defaults	
	School Type	
	Titles	
	Referral Issues	
	-----	
	Religion	
	Occupation	
	Letters	
	Medical Condition	
	-----	
	Socio Economic Group	
	Economic Grouping	
	-----	
	Interview Type	
	-----	
	County	
	Country	
	Nationality	
	Ethnic Grouping	
	Study Rationale	
Registration	Rapid Enrolment	
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	De-Register Students	
	-----	
	UFI	UFI_IN_USE
	Load UFI	UFI_IN_USE
	UFI Enrolment	UFI_IN_USE
	-----	
	Update Student Curriculum	
	Course Registration Enquiry	
	-----	
	Print Registration Forms	
	-----	
	Static Data Maintenance	
	Subject Registration Status	
	Subject Registration Status Defaults	
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	-----	
	Maintain Student	
	Re-Instate Student	
	Complete Student	
	Import Student Image	
	Allocate Tutors	
	Allocate Mentors/Tutors	MENTORS_IN_USE
	Transfer Student	
	Transfer Entire Course	
	Service Requests	
	Service Request	
	Service Request Type	
	Merge Duplicates	
	Reports	
	Enrolment Analysis	
	Address Labels	
	Print Id Cards	
	Class List	
	Learning Agreement	
	Student Credit Reports	
	ICGP Listing Reports	ICGP_IN_USE
	-----	
	Student Letters	
	Batch Email/Ad Hoc Letters	
	Staff Letters	
	-----	
	Timetable Attendance	ATTENDANCE_IN_USE
	Attendance Enquiry	ATTENDANCE_IN_USE
	-----	ATTENDANCE_IN_USE
	Attendance Maintenance	ATTENDANCE_IN_USE
	Attendance Group	ATTENDANCE_IN_USE
	-----	ATTENDANCE_IN_USE
	Attendance Group Type	ATTENDANCE_IN_USE
	Attendance Entry Level	ATTENDANCE_IN_USE
	Absence Type	ATTENDANCE_IN_USE
	-----	ATTENDANCE_IN_USE
	Timetable Template	ATTENDANCE_IN_USE
	Venue	ATTENDANCE_IN_USE
	-----	
	Person Enquiry	
	Maintain Person	
	Medal Detail	
	-----	

Contacts	CONTACTS_IN_USE
Contacts	CONTACTS_IN_USE
Static Data	CONTACTS_IN_USE
Contact Type	CONTACTS_IN_USE
Contact Category	CONTACTS_IN_USE
Contact Transaction Category	CONTACTS_IN_USE
Contact Transaction Type	CONTACTS_IN_USE
Contact Defaults	CONTACTS_IN_USE
Relationship	CONTACTS_IN_USE
Relationship Type	CONTACTS_IN_USE
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Activity Category	
Section of Industry	
-----	
Organisation Labels	
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Work Based Learning	WBL_IN_USE
Maintain Work Based Learner	WBL_IN_USE
Work Based Learner Enquiry	WBL_IN_USE
-----	
Maintain Training Co-Ordinator	WBL_IN_USE
-----	
Work Based Invoice	WBL_IN_USE
Invoice Plan	WBL_IN_USE
-----	
Employment Length	WBL_IN_USE
Health and Safety	WBL_IN_USE
Occupational Area	WBL_IN_USE
Exports	
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Status Type	
Status	
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Note Type	
Note Type Defaults	
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Residential Status	
Residential Status Detail	
Person Type	
Reference Number Type	
Relationship	
Relationship Type	
Institution Calendar	
Event	
PostCode	
Employee Type	
Employer Type	
Job Description	
Salary Frequency	
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workflow Type	
workflow Stage	
Course Manager	
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Qualification Entry	
-----	
Course Maintenance	
Module Maintenance	
Course Rollover	
Qualification Maintenance	
Basedata Maintenance	BASEDATA_REQUIRED
Document Maintenance	
-----	
Marketing Document	
Registration Check Defaults	
Reports	
Course Structure	
Static Data Maintenance	
Mode of Study	
Module Type	
Document Type	
Document Template	
Module Group	
Module Level	
Publicity Type	
Group Type	
-----	
Department Maintenance	
Faculty Maintenance	
Division Maintenance	
Location Maintenance	
-----	
Course Year	
Course Level	
Course Stream	

	Award	
	Assessment	
	Assessment Type	
	Target Type	
Progression Manager	Results Enquiry	
	Exam Timetable	EXAM_ENTRY_TYPE = NCEA or None
	Assessment Management	
	Results Entry	
	Exams Pre-Entry Maintenance	
	Exam Entry Management	
	Award Year Calculator	
	Overall Grade Management	
	Module Grade Maintenance	
Import Results	Results Import	
Progression Control	Marks and Standards	M_AND_S_IN_USE
	Examination Security	
	Grade Scheme	
	Marks and Standards Defaults	
	Exam Entry Defaults	
	Exam Board	
End of Year Procedures	End of Assessment	
	End of Year Rollover	
	ILR End of Year Rollover	
HETAC Exams	HETAC Submissions	NCEA_REQUIRED
	HETAC Accs Submissions	NCEA_REQUIRED
	HETAC Export	NCEA_REQUIRED
Reports	Exam Timetable	
	Sign-in Sheet	
	Mark Sheet	
	Mark Entry Sheet	
	Broadsheet	
	Notice Board List	
	Transcript	
	Certificate	
	Progression Manager Letters	
Static	Data Maintenance	
	Assessment Sitting	
	Assessment Period	
	Assessment Static Data	
	Grade	
	Result Entry Level	
	Award Body	
	Centre Number Details	
	Edexcel Mode of Study	
	Edexcel Vocational Select	
Returns Management	ILR	ISR_REQUIRED
	Learner Defaults	ISR_REQUIRED
	Learner	ISR_REQUIRED
	Import Funding Details	ISR_REQUIRED
	Funding Analysis Reports	ISR_REQUIRED
	ILR Export	ISR_REQUIRED
	Static Data	ISR_REQUIRED
	Learner Static Data	ISR_REQUIRED
	Temporary Qualification	ISR_REQUIRED
	Qualification Entry Type	ISR_REQUIRED
	Qualification Outcome	ISR_REQUIRED
	Completion Status	ISR_REQUIRED
ISR	Default Values	ISR_REQUIRED
	Student Indicators Record	ISR_REQUIRED
	ISR Export	ISR_REQUIRED
	Person Indicators Static Data	ISR_REQUIRED
	Learning Difficulty/Disability	ISR_REQUIRED
	Learning Difficulty	ISR_REQUIRED
	Disability	ISR_REQUIRED
	Residential Accommodation	ISR_REQUIRED
	Student Initiative	ISR_REQUIRED
Student	Indicators Static Data	ISR_REQUIRED
	Destination Type	ISR_REQUIRED
	Participation Category	ISR_REQUIRED
	Entry Qualification Status	ISR_REQUIRED
	Funding 16 to 18	ISR_REQUIRED
	Term Time Accommodation	ISR_REQUIRED
	Withdrawal Type	ISR_REQUIRED
	Programme Type	ISR_REQUIRED
	Completion Type	ISR_REQUIRED



	HE Static Data	ISR_REQUIRED
	SOC Occupation Code	ISR_REQUIRED
	Scottish Highers	ISR_REQUIRED
	Number A Levels	ISR_REQUIRED
	Vocational Qualifications	ISR_REQUIRED
	HEIFES Mode	ISR_REQUIRED
	HEIFES Level	ISR_REQUIRED
	HE Tuition Fee Source	ISR_REQUIRED
	Course/Module Indicators Static Data	ISR_REQUIRED
	Tuition Fee Type	ISR_REQUIRED
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	Non-Payment Type	ISR_REQUIRED
	Tuition Fee Source	ISR_REQUIRED
	Council HCFE Funding	ISR_REQUIRED
	Major Funding Source	ISR_REQUIRED
	Minor Funding Source	ISR_REQUIRED
	Franchise Type	ISR_REQUIRED
	NVQ Delivery	ISR_REQUIRED
	Government Initiative	ISR_REQUIRED
	Franchise Partner	ISR_REQUIRED
	Mode of Delivery	ISR_REQUIRED
	Employer Role	ISR_REQUIRED
	Main Delivery Method	ISR_REQUIRED
	Funding Analysis Reports	ISR_REQUIRED
HESA	Defaults	HESA_REQUIRED
	Exports	HESA_REQUIRED
	Student HESA	HESA_REQUIRED
	Update Classification	HESA_REQUIRED
	-----	HESA_REQUIRED
	Reports	HESA_REQUIRED
	HESA/Quercus Differences Report	HESA_REQUIRED
	-----	HESA_REQUIRED
	NCB Static Dataus Differences Report	HESA_REQUIRED
	Credit Bearing Static Dataus Differences Report	HESA_REQUIRED
HEA	HEA Return	HEA_REQUIRED
	ISCED Coding	HEA_REQUIRED
MIAP	MIAP Export/Import	HESA_REQUIRED
	Fees/Sponsorship	
	Fees	
	Student Account Enquiry	
	Aged Debt	
	Batch Update Student Fee Category	
	-----	
	Course Fee Maintenance	
	Transaction Processing	
	ICGP Allocate Payments	ICGP_IN_USE
	Transaction Batch Processing	
	Suspense Account	
	Debit Student Fees	
	Instalment Template	
	-----	
	Allocate Giro Numbers	GIROS_IN_USE
	Student Giro	GIROS_IN_USE
	-----	
	Imports/Exports	
	Bank Imports	
	Financials Exports	
	-----	
	Reports	
	Print Statements	
	Daily Receipt	
	ICGP Batch Reports	ICGP_IN_USE
	ICGP Create New Invoice	ICGP_IN_USE
	ICGP Reprint Invoice	ICGP_IN_USE
	Daybook	
	Course Fee Analysis	
	-----	
	Control Account Analysis	
	ICGP Aged Debtors Report	ICGP_IN_USE
	ICGP Aged Debtors Analysis Breakdown	ICGP_IN_USE
	Exported Batches	
	-----	
	Student Fee Analysis	
	Fees Report	
	Fees Letters	

Static	Data maintenance	
	Fee Parameters	
	Fee Category Maintenance	
	Fee Type	
	Fee Level	
	-----	
	Payment Type	
	Update Type	
	-----	
	Financial Transaction Type	
	-----	
	Financial Exports File Layout	
	Course Financials Link	
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Student Loan Company		
Sponsorship		
	Sponsorship Maintenance	
	Maintain Sponsors Invoice	
	-----	
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	Print Statements	
	Reports	
	Static Data Maintenance	
	Grant Authority	
	Funding Type	
	Invoice Status	
Student Finance		
	Student Finance	
	Fund Maintenance	
Graduates		ALUMNI_REQUIRED
	Conferring	CONFERRING_IN_USE
	Conferring	CONFERRING_IN_USE
	Graduate	ALUMNI_REQUIRED
	Maintain Graduate	ALUMNI_REQUIRED
	Graduation	ALUMNI_REQUIRED
	Transcript	ALUMNI_REQUIRED
HEA/FDR		
	Maintain FDR	ALUMNI_REQUIRED
	Static Data	ALUMNI_REQUIRED
	Award Level	ALUMNI_REQUIRED
	Classification	ALUMNI_REQUIRED
	Country	ALUMNI_REQUIRED
	Course	ALUMNI_REQUIRED
	Employment Sector	ALUMNI_REQUIRED
	Faculty	ALUMNI_REQUIRED
	Group of Study	ALUMNI_REQUIRED
	Institute	ALUMNI_REQUIRED
	Occupation	ALUMNI_REQUIRED
	Origin	ALUMNI_REQUIRED
	Nationality	ALUMNI_REQUIRED
	Region	ALUMNI_REQUIRED
	Salary	ALUMNI_REQUIRED
DLHE		ALUMNI_REQUIRED
	Mailing List	ALUMNI_REQUIRED
	Static Data Maintenance	ALUMNI_REQUIRED
	Mailing List	ALUMNI_REQUIRED
	Mailing List Item	ALUMNI_REQUIRED
Window		
	Cascade	
	Tile Horizontally	
	Tile Vertically	

### QUERY\_ONLY\_ROLE

```

File
  Run Form
  Exit
Records
  Student Enquiry
  -----
  Medal Detail
  -----
  Static Data Maintenance
    Withdrawal Reason
    Relationship Type
    Employee Type
    Employer Type
    Job Description
    Salary Frequency
    workflow Plan
    workflow Type
    workflow Stage
Course Manager
  Course Enquiry
  Qualification Entry
  Marketing Document
window
  Cascade
  Tile Horizontally
  Tile Vertically
  
```

### RECORDS\_ADMIN

```

File
  Run Form
  Exit
Records
  Medal Detail
  -----
  Contacts
    Static Data
      Contact Type CONTACTS_IN_USE
      Contact Category CONTACTS_IN_USE
      Contact Transaction Category CONTACTS_IN_USE
      Contact Transaction Type CONTACTS_IN_USE
      Contact Defaults CONTACTS_IN_USE
      Relationship CONTACTS_IN_USE
      Relationship Type CONTACTS_IN_USE
  Static Data Maintenance
    Status Type
    Status
    Withdrawal Reason
    Note Type
    Note Type Defaults
    Notes Security
    Student Category
    Residential Status
    Residential Status Detail
    Person Type
    Reference Number Type
    Relationship
    Relationship Type
    Institution Calendar
    Event
    PostCode
    Employee Type
    Employer Type
    Job Description
    Salary Frequency
    workflow Plan
    workflow Type
    workflow Stage
Returns Management
  ILR ISR_REQUIRED
  ISR ISR_REQUIRED
  HESA HESA_REQUIRED
  MIAP HESA_REQUIRED
  MIAP Export/Import HESA_REQUIRED
Graduates
  Graduate ALUMNI_REQUIRED
  [] ALUMNI_REQUIRED
window
  Cascade
  Tile Horizontally
  Tile Vertically
  
```

RECORDS_ROLE		
File	Run Form	
	Exit	
Records	Student Enquiry	
	-----	
	Maintain Student	
	Re-Instate Student	
	Complete Student	
	Import Student Image	
	Allocate Tutors	
	Allocate Mentors/Tutors	MENTORS_IN_USE
	Transfer Student	
	Transfer Entire Course	
	Service Requests	
	Service Request	
	Service Request Type	
	Merge Duplicates	
	Reports	
	Enrolment Analysis	
	Address Labels	
	Print Id Cards	
	Class List	
	Learning Agreement	
	Student Credit Reports	
	ICGP Listing Reports	ICGP_IN_USE
	-----	
	Student Letters	
	Batch Email/Ad Hoc Letters	
	Staff Letters	
	-----	
	Timetable Attendance	ATTENDANCE_IN_USE
	Attendance Enquiry	ATTENDANCE_IN_USE
	-----	
	Attendance Maintenance	ATTENDANCE_IN_USE
	Attendance Group	ATTENDANCE_IN_USE
	-----	
	Attendance Group Type	ATTENDANCE_IN_USE
	Attendance Entry Level	ATTENDANCE_IN_USE
	Absence Type	ATTENDANCE_IN_USE
	-----	
	Timetable Template	ATTENDANCE_IN_USE
	Venue	ATTENDANCE_IN_USE
	-----	
	Person Enquiry	
	Maintain Person	
	Medal Detail	
	-----	
	Contacts	CONTACTS_IN_USE
	Contacts	CONTACTS_IN_USE
	-----	
	Organisation	
	Organisation	
	Organisation Type	
	Activity Category	
	Section of Industry	
	-----	
	Organisation Labels	
	Work Based Learning	WBL_IN_USE
	Maintain Work Based Learner	WBL_IN_USE
	Work Based Learner Enquiry	WBL_IN_USE
	-----	
	Maintain Training Co-Ordinator	WBL_IN_USE
	-----	
	Work Based Invoice	WBL_IN_USE
	Invoice Plan	WBL_IN_USE
	-----	
	Employment Length	WBL_IN_USE
	Health and Safety Checks	WBL_IN_USE
	Occupational Area	WBL_IN_USE
	Exports	
	Talis Library Export	
	-----	
	Tokario Exports	TOKARIO_IN_USE
	-----	
	Static Data Maintenance	
	Withdrawal Reason	
	Relationship Type	
	Employee Type	
	Employer Type	
	Job Description	
	Salary Frequency	
	workflow Plan	
	workflow Type	
	workflow Stage	

Graduates		
	Graduate	ALUMNI_REQUIRED
	Maintain Graduate	ALUMNI_REQUIRED
	Graduation	ALUMNI_REQUIRED
	Transcript	ALUMNI_REQUIRED
Window	Cascade	
	Tile Horizontally	
	Tile Vertically	

### REGISTRATION\_ADMIN

File	Run Form	
	Exit	
Registration	De-Register Students	
	-----	
	UFI	UFI_IN_USE
	Load UFI	UFI_IN_USE
	UFI Environment	UFI_IN_USE
	-----	
	Static Data Maintenance	
	Subject Registration Status	
	Subject Registration Status Defaults	
Window	Cascade	
	Tile Horizontally	
	Tile Vertically	

### REGISTRATION\_ROLE

File	Run Form	
	Exit	
Registration	Rapid Enrolment	
	Register Students	
	De-Register Students	
	-----	
	Update Student Curriculum	
	Course Registration Enquiry	
	-----	
	Print Registration Forms	
Window	Cascade	
	Tile Horizontally	
	Tile Vertically	

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