



CampusIT

Systems Modification and Support Guide



CampusIT

Document information

Document version	1.0
Document title	Systems Modification and Support Guide
Software application	all
Software version	all
Customer	all
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1 Introduction

1.1 Purpose of this manual

The purpose of the document is to:

- identify elements of the CampusIT solution that customers can configure or customise to meet their specific needs
- provide an understanding of the skills required to configure or customise the solution
- outline CampusIT's position regarding support for specific configurations or customisations

1.1.1 What is configuration?

Configuration refers to the setting of database values which:

- enable or disable particular core application functions
- determine how data is displayed and accessed

Configuration requires you to set static database parameter values. It does not involve writing dynamic code (such as SQL queries or programming scripts) or creating external resources (such as XLIFF files).

1.1.2 What is customisation?

Customisation refers to the development of resources and services which enhance or extend core application functions, for example:

- developing reports which are specific to your organisation
- branding the application with custom stylesheets and graphics
- integrating Quercus with third-party applications via the Quercus integration architecture or application APIs

Customisation may require you to write SQL queries, programming scripts or to create other forms of custom content such as XSLT data transformations, CSS stylesheets or XLIFF localisation resource files. You will need to document, manage and version these resources yourself.

1.2 Audience for this manual

1.2.1 Business roles

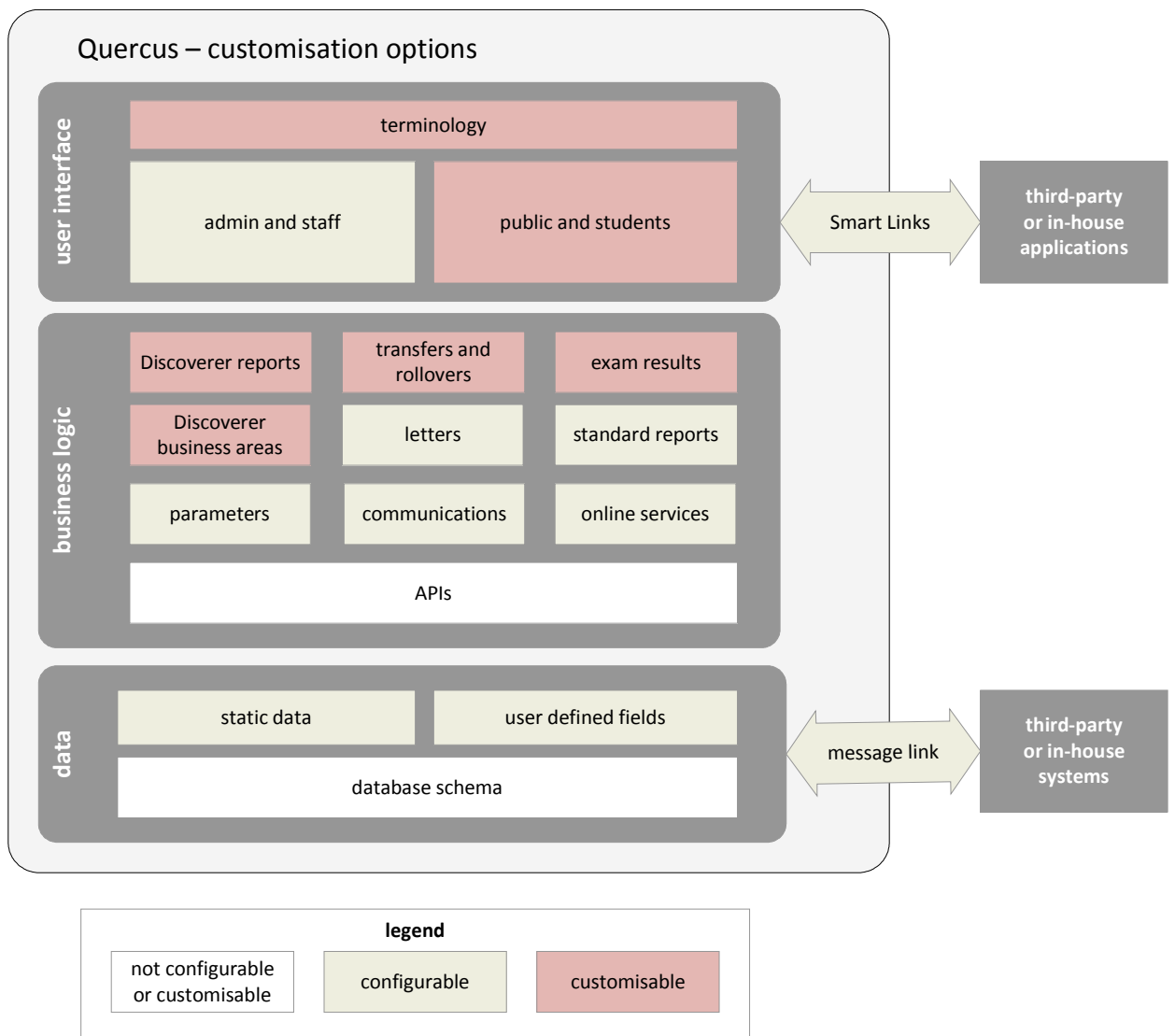
This manual is for IT support staff and system administrators responsible for the deployment, support and maintenance of the QuercusPlus and QuercusLive products.

1.2.2 Learning prerequisites

Readers of this manual should be familiar with the basic operation of the QuercusLive Control Centre and QuercusForms.

2 Elements of the CampusIT solution that can be configured or customised

2.1 Overview



2.2 Elements that can be configured

The following elements of the system can be configured:

static data	<p>You can change the options relating to core business elements which vary from institution to institution, such as curriculum structure, fees structure and student record maintenance practices.</p> <p>You change these options via the various Static Data Maintenance options available in the various QuercusForms menus.</p>
user-defined fields	<p>User-defined fields allow you to define your own metadata categories which can be used to classify custom notes. Custom notes can be attached to student data records and can be used to organise ad-hoc information or to trigger particular workflow actions.</p>
parameters	<p>You can maintain core system-level information such as institution details, standard report parameters and operator information.</p> <p>You change these options via the File menu options in the QuercusForms interface. Additionally various non-core or region-specific functions e.g. the use of ISCED or HESA codings, exam-entry types and alumni-related functions can be enabled or disabled by setting parameter values in the SetSQLEnv.sql file.</p>
communications	<p>Options exist allowing you to set up standard user messages and communications.</p>
online services	<p>The QuercusLive online service is highly configurable. You can control many aspects of how the information is displayed in both the staff-facing and student-facing components of the service. For example, you can choose whether student notes or financial information is displayed. You can also restrict the display of sensitive information to specific groups of users via Quercus's access control facilities.</p> <p>You can also choose whether staff and students are allowed to edit their personal details and the choose the aspects of the student record that are editable by staff.</p>
letters	<p>Quercus provides facilities to automatically generate mailshots and standard letter types such as offers of places or exam results. The content of these letters can be configured by setting up templates containing your own boilerplate phrases interspersed with special codes which pull information from the database when the letters are printed.</p>
standard reports	<p>Quercus provides an extensive collection of standard reports. The content and labelling of these reports can be configured through the Report Parameters options in the QuercusForms File menu.</p>

2.3 Elements that can be customised

The following elements of the system can be customised:

Discoverer reports	<p>The Discoverer reports module allows you to run custom SQL queries against the data held in your Quercus database and output the results of the query as a custom report which can be printed or web-published. These reports can be saved and run on a regular or as-needed basis.</p>
Discoverer business areas	<p>Discoverer allows you to build custom views of the database related to specific business areas. These views are optimised for report querying.</p>
transfers and rollovers	<p>Quercus provides allows you to write custom plugins that will trigger specific workflow actions when year-end or session-end processes, such as transfers or rollovers, are executed.</p>
exam results	<p>Default pass and fail grades, compensation rules and exam calculators to-be-used can be configured through the Marks and Standards option with QuercusForms' Progression Manager.</p> <p>These default rules can be overridden for individual subjects at module instance level via the Progression Rules options within QuercusForms.</p> <p>You can use the supplied exam calculators or you can interface to your own custom calculators via the Exams Calculator API.</p>
terminology	<p>The user-interface (field names, on-screen messages and help) can be localised to use your own terminology and can be translated into multiple languages.</p> <p>Localisation and translation is handled using XLIFF resource files.</p>
student and public user interfaces	<p>The QuercusLive interface can be styled to fit your corporate branding, Styling can be customised through CSS stylesheets and the use of custom graphics.</p>

Please refer to *Configuration and customisation options for elements of the CampusIT solution*, p.8 for a detailed listing of the elements — including available documentation, skills required, and services available.

2.4 Elements that cannot be configured or customised

The elements listed below can only be modified by CampusIT — they cannot be amended and maintained by customers:

- database schema (Quercus and Solar)
- application program interfaces (APIs)
- web service interfaces
- Oracle forms

2.5 Configuration and customisation options for elements of the CampusIT solution

system elements	documentation available	competencies required	customer maintains	support available
static data	<ul style="list-style-type: none"> - QuercusPlus User Guide 	<ul style="list-style-type: none"> - none 	<ul style="list-style-type: none"> - configuration parameters 	<ul style="list-style-type: none"> - standard SLA* - training (T&M)**
parameters	<ul style="list-style-type: none"> - QuercusPlus User Guide 	<ul style="list-style-type: none"> - none 	<ul style="list-style-type: none"> - configuration parameters 	<ul style="list-style-type: none"> - standard SLA - training (T&M)
user defined fields	<ul style="list-style-type: none"> - QuercusPlus User Guide 	<ul style="list-style-type: none"> - regular expressions (for advanced data validation) 	<ul style="list-style-type: none"> - configuration parameters 	<ul style="list-style-type: none"> - standard SLA - training (T&M)
communications	<ul style="list-style-type: none"> - QuercusLive User Guide 	<ul style="list-style-type: none"> - none 	<ul style="list-style-type: none"> - configuration parameters 	<ul style="list-style-type: none"> - standard SLA - training (T&M)
online services	<ul style="list-style-type: none"> - QuercusLive User Guide 	<ul style="list-style-type: none"> - none 	<ul style="list-style-type: none"> - configuration parameters 	<ul style="list-style-type: none"> - standard SLA - training (T&M)
letters and standard reports	<ul style="list-style-type: none"> - QuercusPlus Report Guide - QuercusPlus Database Reference Guide 	<ul style="list-style-type: none"> - Oracle Reports Builder 	<ul style="list-style-type: none"> - source code 	<ul style="list-style-type: none"> - standard SLA (limited to integration API between QuercusPlus and reports/letters) - training (T&M)
Discoverer reports	<ul style="list-style-type: none"> - Oracle Discoverer documentation (available from Oracle Corp.) 	<ul style="list-style-type: none"> - Oracle Discoverer 	<ul style="list-style-type: none"> - source code 	<ul style="list-style-type: none"> - standard SLA (limited to standard business areas supplied by CampusIT) - training (T&M) - technical consultancy (T&M)
Discoverer business areas	<ul style="list-style-type: none"> - QuercusPlus Database Reference Guide 	<ul style="list-style-type: none"> - Oracle Discoverer - relational database concepts e.g. SQL 	<ul style="list-style-type: none"> - source code 	<ul style="list-style-type: none"> - training (T&M) - technical consultancy (T&M)
transfer and rollover procedures	<ul style="list-style-type: none"> - QuercusPlus Transfer and Rollover API specification - example of standard transfer 	<ul style="list-style-type: none"> - Oracle PL/SQL development 	<ul style="list-style-type: none"> - source code 	<ul style="list-style-type: none"> - advance notification about changes in APIs - business and technical consultancy (T&M)
exam results calculators	<ul style="list-style-type: none"> - QuercusPlus Exam Results Calculators API specification - example of calculator (source code) 	<ul style="list-style-type: none"> - Oracle PL/SQL development 	<ul style="list-style-type: none"> - source code 	<ul style="list-style-type: none"> - advance notification about changes in APIs - business and technical consultancy (T&M)
terminology	<ul style="list-style-type: none"> - Oracle Application Express Developers Guide 	<ul style="list-style-type: none"> - XLIFF Editor 	<ul style="list-style-type: none"> - customised XLIFF files 	<ul style="list-style-type: none"> - standard SLA - technical consultancy (T&M)
student and public user interfaces	<ul style="list-style-type: none"> - Oracle Application Express Developers Guide 	<ul style="list-style-type: none"> - Oracle Application Express - Oracle PL/SQL development - cascading style sheets - graphic design 	<ul style="list-style-type: none"> - source code 	<ul style="list-style-type: none"> - Technical consultancy (T&M) - Application Express training (T&M)

* service-level agreement ** time and materials

3 Summary of competencies required for configuration and customisation

3.1 Competencies required

3.1.1 Business competencies

All changes to the your CampusIT solution require an understanding of your institution’s business processes and the combination of configuration options that will best facilitate these processes.

For this reason we suggest that configuration should involve close liaison between technical staff and business process experts.

3.1.2 Technical competencies

Report writing	Familiarity with relational database concepts Familiarity with Oracle querying and reporting tools, in particular: <ul style="list-style-type: none">– Oracle Reports Builder– Oracle Discoverer
User interface customisation	Familiarity with the XLIFF format (user interface terminology files are maintained in XLIFF format) Familiarity with CSS and graphic file manipulation
Integration with third-party applications	Familiarity with concepts and terminology of integration architectures (e.g. service-orientated architecture, enterprise service bus) SOAP/XML development (any language/ tool) Enterprise Service Bus administration

4 Support for configuration and customisation

4.1 Responsibilities

4.1.1 CampusIT

CampusIT is responsible for maintenance of:

- QuercusPlus database schema
- QuercusLive database schema
- core QuercusPlus applications
- QuercusLive Control Centre
- Quercus application APIs
- Quercus web services
- technical and end-user documentation relating to:
 - the core system as delivered
 - customisations and configurations made by CampusIT

4.1.2 Customer

The customer is responsible for:

- ensuring that requisite skills are available to perform desired configuration and customisation
- testing and implementing modifications
- implementing a formal sign-off process — including business and technical sign-off
- technical and end-user documentation relating to customisations and configurations implemented by the customer

4.2 Guidance when amending and maintaining source code

- Avoid any modifications to CampusIT's product baseline.
- Keep a copy of the source code in a secure place.
- Provide source code, documentation and adequate technical support to CampusIT when requesting support from CampusIT on officially supported APIs.
- Compile source code (when relevant).
- Perform integration, functional and regression testing.
- Keep documentation about non-standard software in use and make it available to CampusIT Helpdesk when requested.
- Modify/upgrade/rewrite source code when CampusIT API or database structures change.
- Modify/upgrade/rewrite source code for new releases of Oracle database and application server.

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