Reviewing Installation Setup and System Defaults

Understanding Installation Setup and System Defaults

There are several settings on the system's installation pages that you should review before setting up any of the Campus Solutions applications. Specifically, you should review settings that point the system to the applications that you have installed, settings that begin and maintain incremental numbering, and settings that define basic default values throughout the system. It is a good idea to review the country codes and country address formats defined on the installation pages, too. If any of these settings are not correct or do not reflect the institution's design decisions, you could experience problems getting the system to operate properly.

Selecting General Installation Options

To set up general installation options, use the Installation Table component (INSTALLATION_TBL).

This section discusses how to:

- Select installed applications.
- Select installation settings and defaults.
- Select General Ledger installation options.

For each site where you implement Campus Solutions, you must complete the Installation Table to specify various defaults, processing rules, and counters for the system to use. You can have only one set of installation information for each site; this information is required.

If you implement Campus Solutions *and* a separate instance of PeopleSoft Human Capital Management, read the relevant documentation about CS-HCM Integration to understand the setup, functional, and technical implementation considerations.

See:

- Integrating Person Data
- Integrating Setup Data
- Monitoring Integrations Using the Integrity Utility
- *Information Center: CS-HCM Integration for PeopleSoft Enterprise Campus Solutions* in My Oracle Support (ID 2091799.2).

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Pages Used to Select General Installation Options

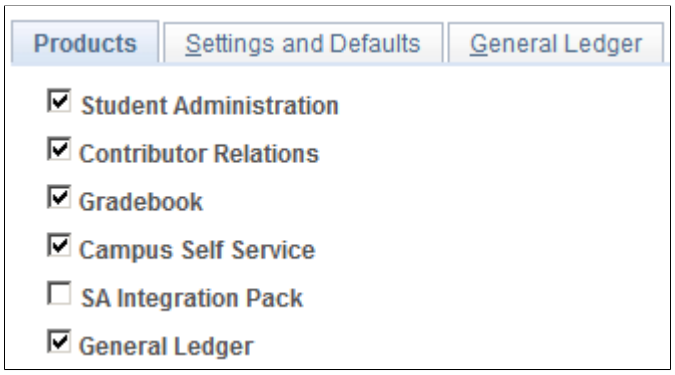
Page Name	*Definition Name*	*Navigation*	*Usage*
Products	INSTALLATION_TBL1	Set Up Common Objects > Install > Installation Table > Products	Select which PeopleSoft applications and application parameters are installed on the system. Ensure that the settings on this page are accurate before using the Campus Solutions system.
PI08 update Settings and Defaults	INSTALLATION_TBL1B	Set Up Common Objects > Install > Installation Table > Settings and Defaults	Select installation settings and defaults including country-specific installation information.
General Ledger	INSTALLATION_TBLGL	Set Up Common Objects > Install > Installation Table > General Ledger	Select General Ledger installation options.
Regional Transactions	SETUP_HRMS. INSTALLATION_TBL.GBL	Set Up Common Objects >Install >Regional Transactions	Use the Regional Transactions - Regions in Transaction page to define the regulatory regions that make up a regulatory transaction type.

Selecting Installed Applications

Access the Products page (Set Up Common Objects > Install > Installation Table > Products).

Image: Products page

This example illustrates the fields and controls on the Products page. You can find definitions for the fields and controls later on this page.



For information about installing General Ledger, see "Setting Up Installation Parameters and Keywords" (PeopleSoft Campus Solutions 9.2: Student Financials).

Selecting Installation Settings and Defaults

Access the Settings and Defaults page (Set Up Common Objects > Install > Installation Table > Settings and Defaults).

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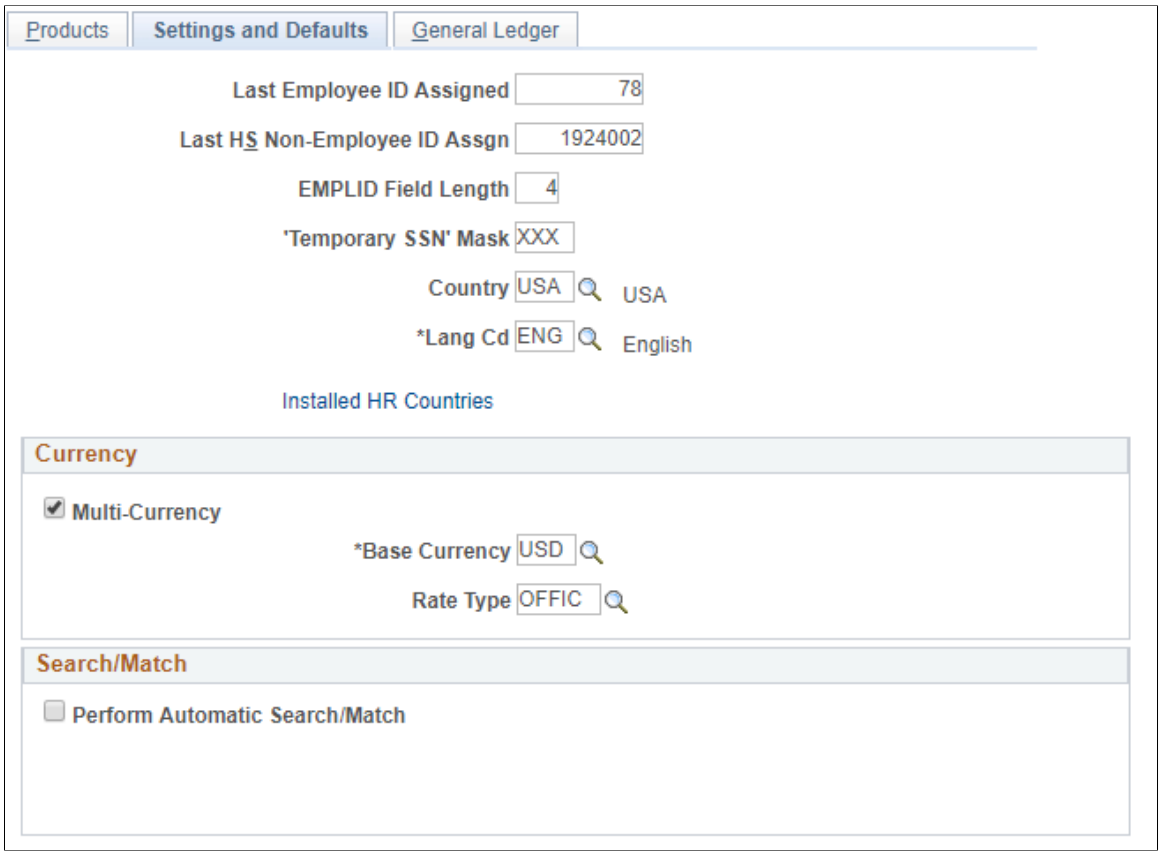
Image: Settings and Defaults page

This example illustrates the fields and controls on the Settings and Defaults page. You can find definitions for the fields and controls later on this page.



Last Employee ID Assigned

Enter the next ID number that you want the system to assign, for both people and organizations, when the system automatically generates IDs.

Last HS Non-Employee ID Assgn

Enter the next ID number that you want to system to assign for Physicians when the system automatically generates IDs.

See "Setting Up Physicians" (PeopleSoft Campus Solutions 9.2: Campus Community).

EMPLID Field Length

Define the length of all new IDs created in the system for both people and organizations. The default value is *4* characters but can be changed to a maximum of 11. This value is used to calculate the number of zeros that precede an ID when the system automatically generates a new ID.

For example, using the default length of *4,* a system-generated ID or organization ID would be 0001, 0002, 0003, and so on. When ID 9999 is generated, the system no longer inserts preceding zeros before the ID number. The next system-generated ID is 10000.

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'Temporary SSN' Mask (temporary Social Security number mask)

Enter a three-digit number to be a default Social Security number for all applicants or people whose Social Security numbers are unavailable. Assign a value that is greater than 800 so that the temporary number does not conflict with valid Social Security numbers.

Country

Select a country for the system to enter as a default value.

Lang CD

The system displays the default base language for the database.

Installed HR Countries

Click the Installed HR Countries link to access the Installed HR Countries page, where you can set up which country-specific regions you want displayed on the Regional tab in the Add/Update a Person page.

For more information, see *PeopleSoft HCM: Application Fundamentals*.

Currency

Multi-Currency

Note: Select the Multi-Currency check box on the PeopleTools Options page (PSOPTIONS).

See *PeopleTools: System and Server Administration*, “Using Administration Utilities.”

Base Currency

Select a currency code from the values in the Currency Code page (CURRENCY_CD_TABLE).

Rate Type

Identify the default rate type on which your currency conversion is based.

Search/Match

Perform Automatic Search Match

Select to perform an automatic search and match when you create a new ID. The system will search the database to determine that you are not entering a duplicate record.

See: "Understanding Search/Match" (PeopleSoft Campus Solutions 9.2: Campus Community)

Selecting General Ledger Installation Options

Access the General Ledger page (Set Up Common Objects > Install > Installation Table > General Ledger).

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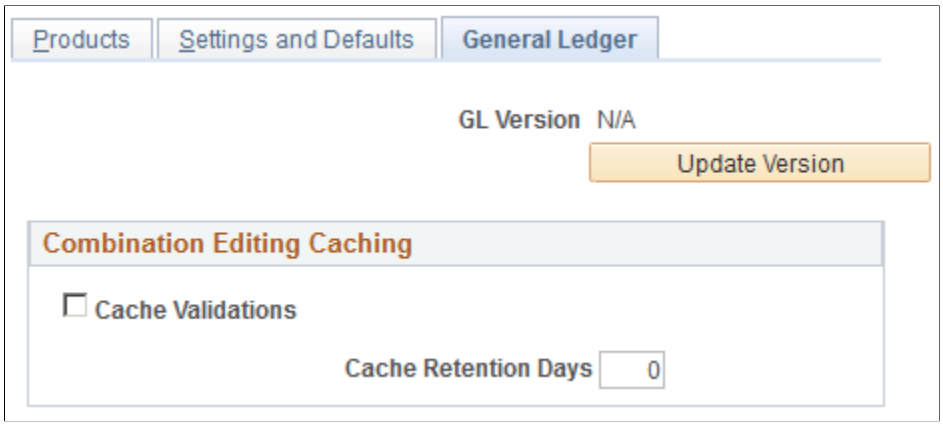
Image: General Ledger page

This example illustrates the fields and controls on the General Ledger page. You can find definitions for the fields and controls later on this page.



GL Version

Displays the version of PeopleSoft General Ledger that is interfacing with Campus Solutions. Click the Update Version button if you change versions. The system will automatically update the GL Version.

Note: Full ChartField functionality is available only when you use PeopleSoft General Ledger 8.4 or higher.

Update Version

Click to test the integration with PeopleSoft Financials and display the latest version of Financials

Combination Editing Caching

Cache Validations

Select to cache the results of your validations. This improves performance.

Cache Retention Days

Enter the number of days to store validation results. The system will delete anything in the cache older than this.

Selecting Student Administration Installation Options

To set up installation options, use the Student Admin Installation component (INSTALLATION_SA).

This section discusses how to:

- Set up incremental numbering.
- Select country-specific features and enable CRM for Higher Education feature.

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Pages Used to Select Student Administration Installation Options

Page Name	*Definition Name*	*Navigation*	*Usage*
Installation Student Admin (Installation Student Administration)	INSTALLATION_SA	Set Up SACR > Install > Student Admin Installation > Installation Student Admin	Bundle 52. Added anonymous grading Set up or review incremental numbering for items throughout the system. Enable anonymous grading.
SA Features	SCC_INSTALL_SA2	Set Up SACR > Install > Student Admin Installation > SA Features	Turn on country-specific features. Enable the CRM for Higher Education feature.

Setting Up Student Administration Options

Access the Installation Student Admin page (Set Up SACR > Install > Student Admin Installation > Installation Student Admin).

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Image: Installation Student Admin page (1 of 2)

This example illustrates the fields and controls on the Installation Student Admin page (1 of 2). You can find definitions for the fields and controls later on this page.

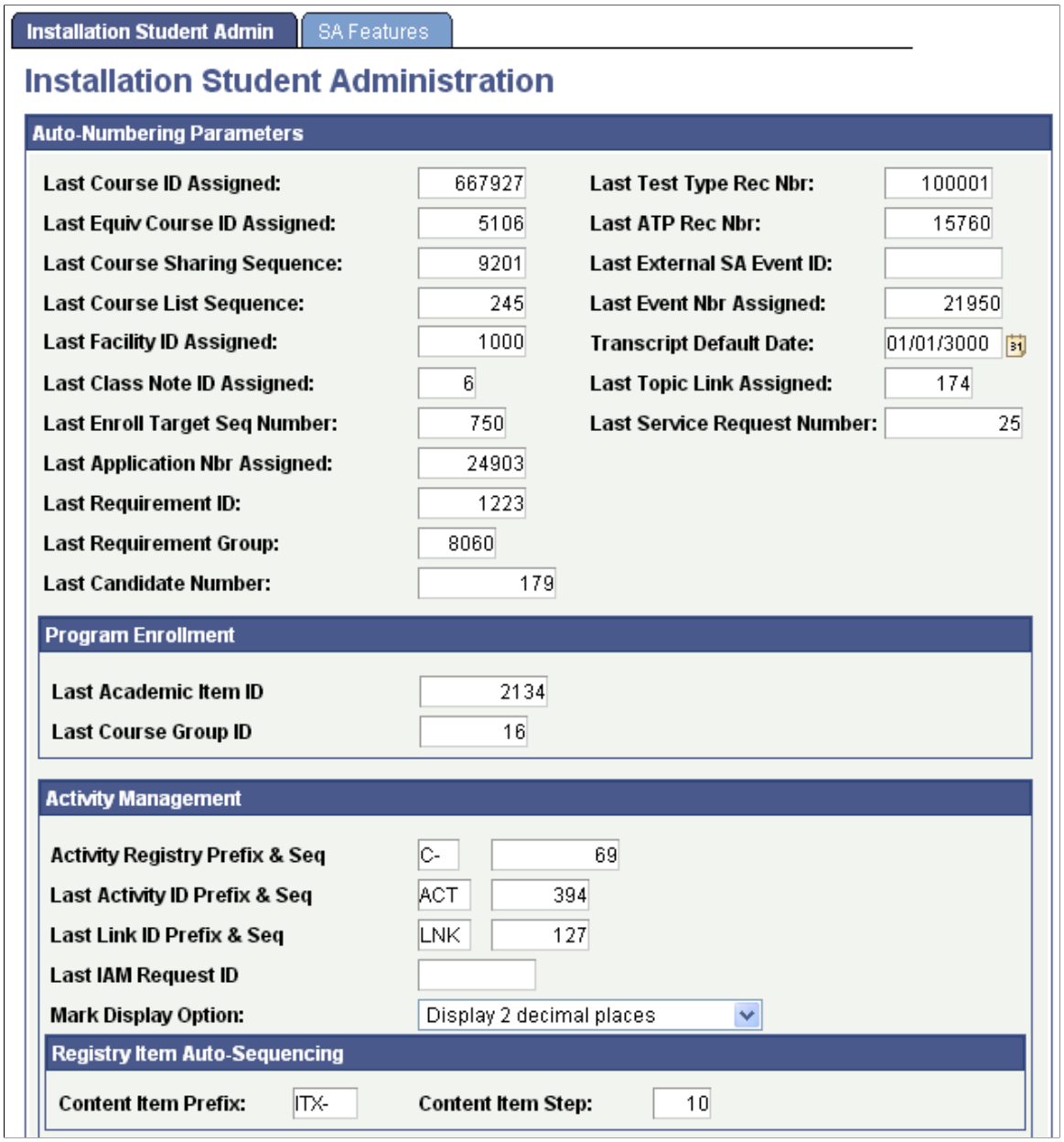

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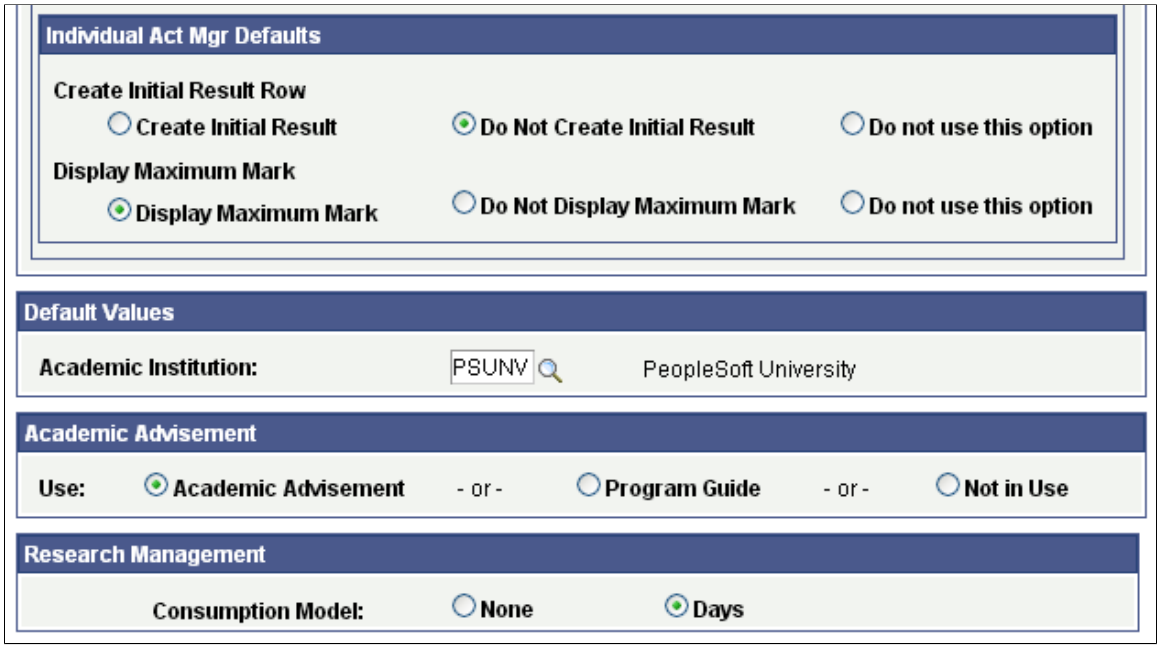
Image: Installation Student Admin page (2 of 2)

This example illustrates the fields and controls on the Installation Student Admin page (2 of 2). You can find definitions for the fields and controls later on this page.



Auto-Numbering Parameters

Each field on this page is automatically incremented or automatically appears by default throughout the system. Set the last used numbers so that automatic numbering does not create numbers that already exist in the data.

If you want the increments of any of these fields to start at a number other than zero, enter that number on this page before you do anything else in the system.

Note: After you have begun converting or entering data and running processes, you can access this page to determine the last number that was incremented for each of the fields listed, but you should *not* change the numbers.

Last Course ID Assigned	Displays the last course ID assigned. Used by PeopleSoft Student Records.
Last Equiv Course ID Assigned (last equivalent course ID assigned)	Displays the last equivalent course ID assigned. Used by Student Records.
Last Course Sharing Sequence	Displays the last course sharing sequence. Used by PeopleSoft Academic Advisement.
Last Course List Sequence	Displays the number of the last course list created. Used by Student Records for enrollment requirements; also used by Academic Advisement for regular academic advisement course lists and for Program Guide course lists.
Last Facility ID Assigned	Displays the last facility ID assigned. Use to enable the system to display by default an automatically incremented facility ID

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	number each time that you create a new facility on the Facility Table setup page. If you do *not* want to use auto incremental numbering, you are required to enter a value for Facility ID when adding a new facility. Used by various applications.
Last Class Note ID Assigned	Displays the last class note ID assigned. Used by Student Records.
Last Enroll Target Seq Number (last enrollment target sequence number)	Displays the last enrollment target sequence number. Used by Student Records and Recruiting and Admissions for Enrollment Management Enrollment Targets.
Last Application Nbr Assigned (last application number assigned)	Displays the last application number assigned. Used by Recruiting and Admissions.
Last Requirement ID	Displays the number of the last requirement ID created. Used by Student Records for enrollment requirements; also used by Academic Advisement for regular academic advisement requirements and for Program Guide requirements.
Last Requirement Group	Displays the last requirement group. Used by Student Records for enrollment requirement groups; also used by Academic Advisement for academic requirement groups, including Program Guide requirement groups.
Last Candidate Number	This field is used in the candidate number generation process. When assigning a new candidate number, the system takes the current value and adds 1, then updates the field with the last calculated number. See "Setting Up Research Tracking" (PeopleSoft Campus Solutions 9.2: Student Records)
Last Test Type Rec Nbr (last test type record number)	Displays the last test type record number. Used in processing suspense records for data loads. Used by Recruiting and Admissions.
Last ATP Rec Nbr (last admissions testing program record number)	Displays the last ATP record number. If you enter *50,000* in this field, the next time that you run the ATP data load SQR process (CCATPLOD), each school loaded has a number assigned starting from 50,000. This field is not connected to the institution's unique ATP code. Used by Campus Community and Recruiting and Admissions.
Last External SA Event ID (last external student administration event ID)	Displays the last external student administration event ID. Used by various applications, including Contributor Relations.
Last Event Nbr Assigned (last event number assigned)	Displays the last event number assigned. Used by various applications, including Contributor Relations.
Transcript Default Date	Displays the transcript default date. This is the default date used for processing academic advisement degree audit reports. To set

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the default to the current date, leave this field blank. Used by Academic Advisement.

Last Topic Link Assigned Displays the last topic link ID assigned. Used by Student Records on the Catalog Data page.

Last Service Request Number Displays the last service request number assigned.

This field is used in the Research Tracking service request ID number generation process. When entering a new service request, the system takes the current value and adds 1, then updates the field with the last calculated number.

See "Setting Up Research Tracking" (PeopleSoft Campus Solutions 9.2: Student Records)

Program Enrollment

Last Academic Item ID Displays the last academic item ID assigned. Used by Program Enrollment.

Last Course Group ID Displays the last course group ID assigned. Used by Program Enrollment.

See the Student Records product documentation for Program Enrollment.

Activity Management

Activity Registry Prefix & Seq These two values concatenate to form the Activity Registry ID that is created in Add mode on the Activity Registry page.

Last Activity ID Prefix & Seq These two values concatenate to form the Activity ID, which is used for managing coursework and ultimately for grading that coursework.

Last Link ID Prefix & Seq These two values concatenate to form the Link ID that is assigned when generating Activity IDs using the Activity Generator or the Activity Manager.

The Link ID is used to associate component and exam activities to multiple parent course roots and is not displayed on any component visible to an end user.

Mark Display Option Define the decimal setting for Mark fields for the purpose of displaying setup values (for example, displaying the required passing mark to students). The length of the Mark field for storing student marks and calculating overall marks is controlled by the Integer and Decimal Position fields on the Result Scale.

Content Item Prefix This field identifies the prefix to be used on the Content Item ID that the system generates when a content item is created in the Activity Registry.

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Content Item Step

This number defines the default sequence between Content Item IDs. When you create a content item in the Activity Registry, the system assigns a content item ID (prefix + step number sequence). A value of *0010* indicates that content item ID numbers are sequenced by 10. You can change this value in the Activity Registry from the creation of one content item ID to the next.

Create Initial Result Row

This setting provides three options when determining how to display the initial result row on the student's Individual Activity Manager (IAM) and the result roster.

Create Initial Result – Select this option to insert a result row with an undetermined status automatically for each assessed activity ID assigned to a student. This creates a result row prior to a result being entered or calculated. This row is visible in the IAM and the result roster. This option can be overridden at the individual student IAM level.

Do Not Create Initial Result – Select this option when you want to use the feature at the IAM level but wish to set it at the individual student level instead of establishing it automatically for all students. If not selected, the system does not create a result row until a result is entered or calculated. The value can be overridden at the individual student IAM level.

Do not use this option – Select this option when choosing not to use the feature.

Display Maximum Mark

This setting provides three options when determining how to display the maximum mark on the result roster.

Display Maximum Mark – Select this option to display the maximum mark allowed (as defined on the Result Scale) on the result roster for each student. You can override this default value on both the individual student IAM and the result roster.

Do Not Display Maximum Mark – Select this option when you want to use the feature at the IAM and roster level but don’t want to populate the maximum mark by default to all students on all rosters. You can override this default value at the individual student IAM level.

Do not use this option – Select this option when choosing not to use the feature.

Anonymous Grading

Bundle 52. New

Enable Anonymous Grading

Select this check box to use the anonymous grading feature.

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Minimum ID Length, **Maximum ID Length**	Enter the minimum and maximum number of digits you want to generate for an anonymous ID.

See "Setting Up Anonymous Grading" (PeopleSoft Campus Solutions 9.2: Student Records).

Default Values

In this group box, enter an Academic Institution to use as a default throughout the system.

Academic Advisement

In this group box, enter an option that affects the type of advisement report that a student sees in self service.

- *Academic Advisement*: This option is selected by default. It indicates that the institution plans to use standard Academic Advisement functionality to populate a student's self-service advisement report.
- *Program Guide*: Select this option to indicate that the institution plans to use Program Guide functionality to populate a student's self-service advisement report
- *Not in Use*: Select this option to indicate that the school intends to use neither method.

See "Understanding Batch Academic Advisement Reports" (PeopleSoft Campus Solutions 9.2: Academic Advisement)

See "Viewing an Advisement Report" (PeopleSoft Campus Solutions 9.2: Self Service)

Research Management

Consumption Model	Define a consumption model. None is selected by default. The option that you select here appears by default in the Consumption Controls group box on the Academic Program/ Academic Plan - Research Processing Options pages. See "Setting Up Research Tracking" (PeopleSoft Campus Solutions 9.2: Student Records)

Selecting Country-Specific Features and Enabling CRM for Higher Education Feature

Access the SA Features page (Set Up SACR > Install > Student Admin Installation > SA Features).

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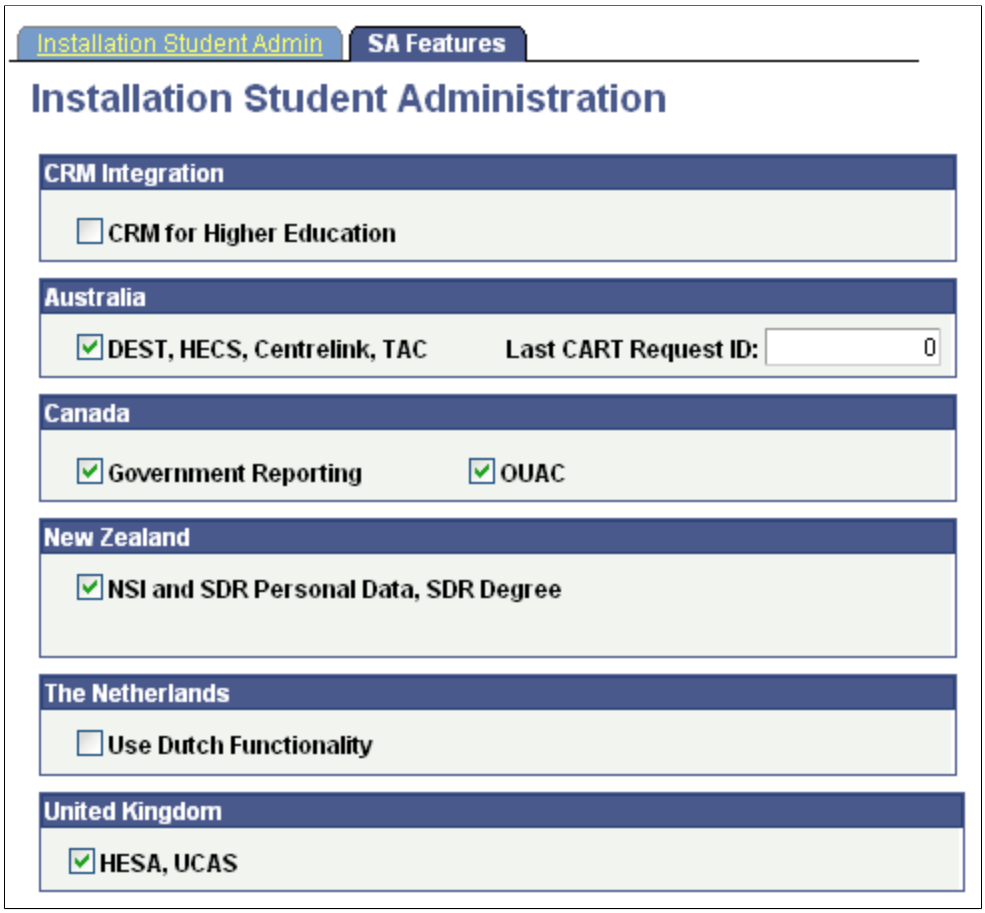
Image: SA Features page

This example illustrates the fields and controls on the SA Features page. You can find definitions for the fields and controls later on this page.



If CRM and Campus Solutions are both licensed at your institution, select the CRM for Higher Education check box to enable CS and CRM to share data in real time.

See Enabling Integration with CRM for Higher Ed.

(AUS, CAN, NZL, NLD, and GBR) Country-Specific Features

Select the appropriate check box to enable functionality specific to each country, which is setID-based.

Important! In order to use country-specific functionality in the system, you must also activate the country's features on the Academic Institution 6 setup page for institution-based functionality.

DEST, HECS, Centrelink, TAC	Select to enable Australian features: Department of Education, Employment and Workplace Relations reporting, Higher Education Contribution Scheme functionality, Centrelink reporting, and Tertiary Admissions Centre admissions functions.
Last CART Request ID	Displays the last CART Request ID that the system assigned to a Centrelink Academic Reassessment Transformation (CART) request file. Each request file has a unique request ID.

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	The system automatically increments the Last CART Request ID each time the CART Request File process loads a request file. If required, reset the Last CART Request ID number. Set a number so that automatic numbering does not create numbers that already exist in the data. This field appears only if you select the DEST, HECS, Centrelink, TAC check box.
Canada	Select to enable Canadian reporting functionality.
New Zealand	Select to enable New Zealand features: National Student Index data and Single Data Return functionality.
The Netherlands	Select to enable Dutch functionality.
United Kingdom	Select to enable United Kingdom features.

Related Links

(AUS, CAN, GBR, NZL, NLD) Activating Other Student Administration Features

Setting Up Primary Permission List Preferences

To set up primary permission list preferences, use the Org Defaults by Permission List component (OPR_DEF_TBL_HR).

This section provides an overview of primary permission lists and discusses how to:

- Set permission list defaults.
- Set industry sector and payroll information.

Related Links

Understanding User Profiles Security

"Understanding PeopleSoft Campus Self-Service Personal Information" (PeopleSoft Campus Solutions 9.2: Self Service)

Understanding Primary Permission Lists

When you are using the User Profiles Management process, it is necessary for you to set up primary permission lists when you give user IDs access to pages.

Use the Primary Permission List table to set predefined tableset sharing as well as systemwide defaults and settings for each of the primary permission lists. The system displays by default the values that you indicate for a particular permission list in the Primary Permission List Preferences table—such as business unit, setID, currency, country, or company code —when a user associated with that permission list logs in to Campus Solutions or Contributor Relations. You can tailor the Campus Solutions systems for each user, controlling the default values that users see on pages in the system.

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Pages Used to Set Up Primary Permission List Preferences

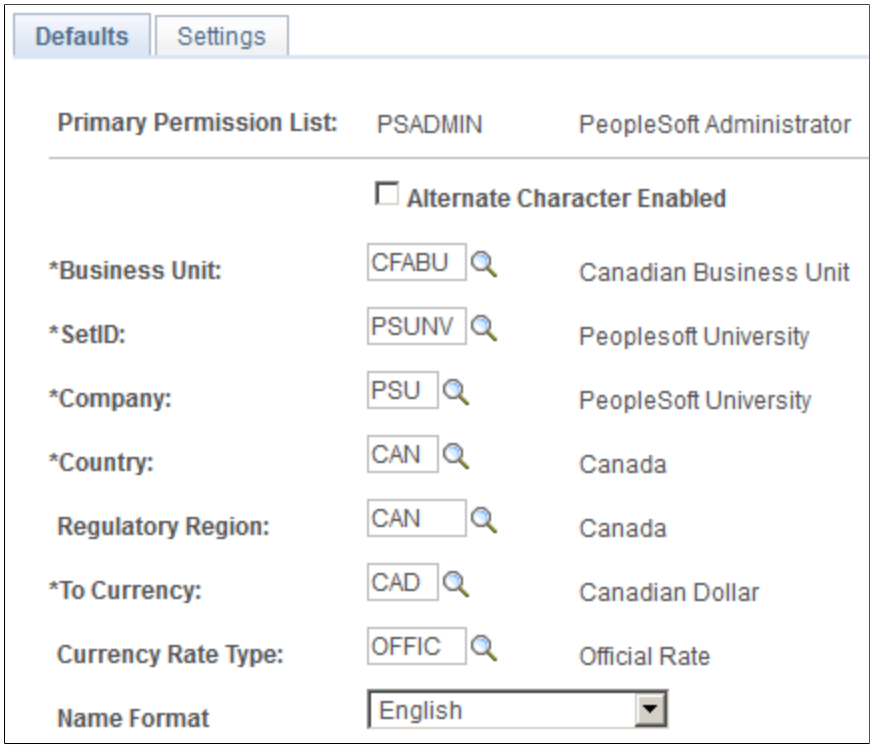
Page Name	*Definition Name*	*Navigation*	*Usage*
Defaults	OPR_DEF_TBL_HR	Set Up Common Objects > Foundation Tables > Organization > Org Defaults by Permission List > Defaults	Set predefined tableset sharing and systemwide defaults for each primary permission list.
Settings	OPR_DEF_TBL_HR2	Set Up Common Objects > Foundation Tables > Organization > Org Defaults by Permission List > Settings	Set the systemwide default settings for each permission list. By using this page, you can tailor the system for each permission list, controlling the default values that users see on pages in the system.

Setting Permission List Defaults

Access the Permission List - Defaults page (Set Up Common Objects > Foundation Tables > Organization > Org Defaults by Permission List > Defaults).

Image: Permission List - Defaults page

This example illustrates the fields and controls on the Permission List - Defaults page. You can find definitions for the fields and controls later on this page.



Note: These defaults override the defaults that you set for these options in the Installation table for this permission list.
The TableSet Record Group Control table regulates what users see in prompt tables.

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Alternate Character Enabled Select to indicate if you want alternate character searching enabled for this permission list.

Business Unit Indicate the default business unit for this permission list from among the list of valid business units stored in the Business Unit table.

SetID Indicate the default setID for this permission list from among the list of valid set IDs stored in the TableSet ID table.

Warning! The values that you indicate here affect business unit and setID defaults for this permission list throughout the system.

Company Enter the default company for this permission list.

Country Enter the default country for this permission list.

To Currency Select a currency to act as default values for this permission list in Campus Solutions.

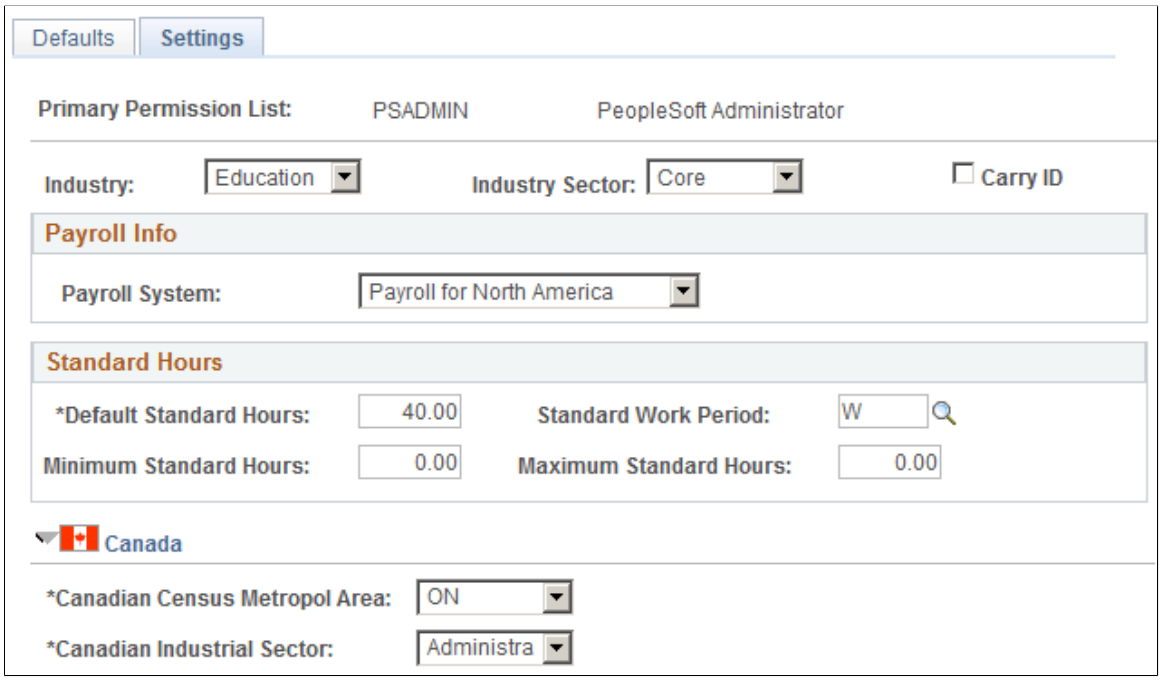
Currency Rate Type Select a currency rate type to act as a default value for this permission list in Campus Solutions.

Setting Industry Sector and Payroll Information

Access the Permission List - Settings page (Set Up Common Objects > Foundation Tables > Organization > Org Defaults by Permission List > Settings).

Image: Permission List - Settings page

This example illustrates the fields and controls on the Settings page. You can find definitions for the fields and controls later on this page.



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Industry	Select the industry for this permission list. Select *Education* to indicate that this is an education database.
Industry Sector	Select the industry sector for this permission list. Values are: *Core, Public Sct* (public sector), and *US Federal.*
Carry ID	Select to carry an ID of the last individual or organization that you enter or select from search box to search box and page to page. You do not have to reenter or reselect the ID each time, if you want to continue editing or reviewing data for the same individual.

If you choose any country other than the U.S. on the Defaults page, country-specific fields may appear on the page as well.

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