

R25™

System Definitions and Defaults



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Contents

System Definitions and Defaults

Purpose

R25 provides a wide variety of options for customizing the environment to meet the needs of individual sites and their users. This includes providing a number of system definitions and defaults.

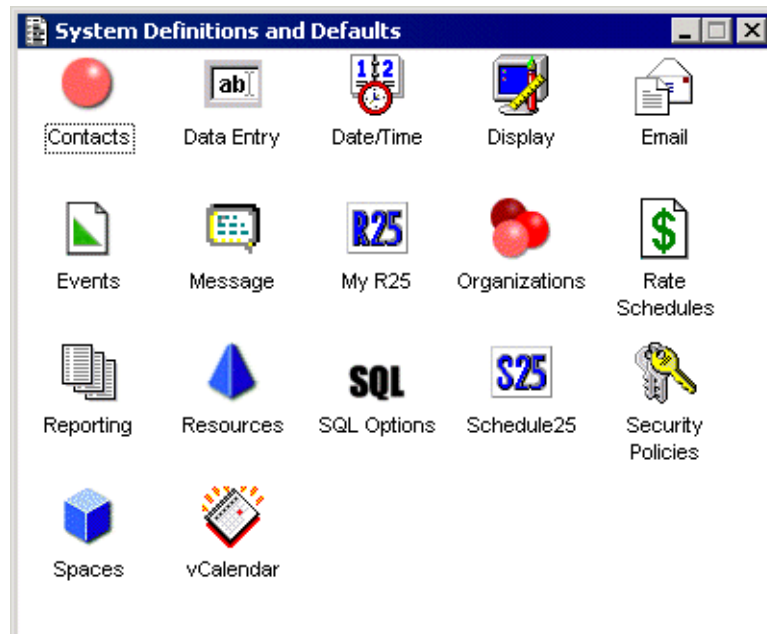
How they're used

The *R25 system definitions* allow the system administrator, or another designated user, to define settings critical to various areas of R25 functionality, such as system security, R25 email, and vCalendar import/export; to establish uniform data entry conventions; and to provide other settings unique to your site.

In addition, the administrator can modify the *system default* settings, which users can later change in their user preferences.

To access system definitions and defaults

Choose Administration > System Definitions from the R25 menu bar to access the display of options:



Data controlled by system settings

As the system administrator, you specify the system definitions for the following kinds of data:

- Data Entry conventions for data storage
- Time Zone (a Date/Time option)
- Date Table, needed for reports and the R25 WebViewer (a Date/Time option)
- SMTP Server to support the R25 Email options
- Defaults for space assignment processing in SpeedBook and how primary organization changes in the SIS to imported events will affect R25 pricing
- Default data inheritance rules for cabinets, folders, and events
- System Message for display to all users in My R25
- Account Formats of the credit/debit codes to be used in pricing
- The User Name to use to access the database when reports are run
- SQL Options: statements to apply to specified actions
- Security Policies, including control of object-level security
- Default group rights for space and resource assignment policy
- Schedule25 (if you've also purchased Schedule25)
- vCalendar

Data initialized by system defaults

You can also modify the system defaults for the following kinds of data. These defaults can be overridden later by individual user preferences.

- Contacts
- Date/Time (excluding the Time Zone and Date Table)
- Display
- Email (excluding the SMTP Server definition)
- Events (excluding certain SpeedBook space assignment defaults, data inheritance rules, and the Primary Organization settings for the R25-SIS interface)

- My R25
- Organizations
- Rate Schedules (excluding the Account Formats)
- Reporting (excluding the reporting User Name)
- Resources
- Spaces

Note Changes made by users to their user preferences have no effect on how data is stored in the R25 database or how other R25 users see the data.

To modify a system definition or default

For an overview of this topic, see [System Definitions and Defaults](#).

- 1 On the System Definitions and Defaults form, double-click the icon for the option you want to modify.

To determine what you want to change, go to:

[“System definitions” on page 8](#)

or

[“System defaults” on page 11](#)

- 2 Click the appropriate tab, if any. Modify your settings as needed. Continue at step 4 if the form has just one tab.
Press F1 on the form for details on the tabs and fields.
- 3 Repeat step 2 until you’ve completed your edits.
- 4 Click OK to save your changes and close the form.
- 5 Repeat these steps for other options as needed.

System definitions

These system settings apply to the overall system environment, and can be accessed and changed only by a system administrator. The settings are described in more detail in the online help for the form (press F1).

Use this option...	And this tab...	To specify...	For this reason...
Data Entry	NA*	System rules to govern case sensitivity in R25, so data entered by users is stored in the database and displayed consistently.	To facilitate user data entry and searches.
Date/Time	Time Zone	Your time zone.	To ensure that dates and times display correctly in R25 and the WebViewer.
	Date Table	The earliest and latest dates for which users will ever generate reports.	So date/time data can be generated for reports and display in the R25 WebViewer.
Email	Server	The name of your simple mail transfer protocol (SMTP) server.	To enable users to send email in R25.
Events	SpeedBook	<ul style="list-style-type: none">• Whether a warning is issued when the user starts to run a space check with no head count specified.• Whether a space can be shared by reservations of the same event.• Whether a warning is issued when a space is shared with another reservation in the same event.	To customize the space assignment environment to suit your scheduling process.

Use this option...	And this tab...	To specify...	For this reason...
Events (cont'd)	Primary Organization	How you want R25 to handle a change made in the student information system (SIS) to the primary organization of an imported event when it affects pricing—whether to automatically change the billing and rate group in R25 to reflect the new primary organization.	You may want changes to the primary organization to affect pricing for imported events differently from events created in R25. (Users can change their user preferences to determine how changes to the primary organization affect pricing for their R25 events.)
	Style	The HTML style to be used when more than one event occupies the same time slot in a “Schedule” usage view for spaces.	To enable users to easily spot time slots occupied by more than one event.
	Inheritance Rules	The default data inheritance rules for new cabinet, folder, and event types.	To initialize settings for creation of new cabinets, folders, and events. These can be modified for individual cabinet, folder, and event types in the Event Frameworks. See the R25 data preparation workbook, <i>Preparing the Scheduling Environment</i> .
Message	NA*	The message—text or HTML—that you want to appear in the My R25 header.	To provide information or graphics you want users to see when they log on.
Rate Schedules	Account Formats	The format for credit and debit account codes.	To specify the format of credit/debit codes that print on invoices.

Use this option...	And this tab...	To specify...	For this reason...
Reporting	User Name	<p>The R25 database user name to be used by Crystal Reports runtime to access the database during report generation.</p> <p>If no user name value is specified, Crystal uses the database logon of the user requesting the report. (This may not be desirable if you are using SQL Options to add logon processing to grant special access to tables.)</p>	<p>To ensure your R25 database is protected during Crystal report generation. When you provide a value here, Crystal accesses the database using this logon, which can have "read only" privileges so there is no risk of data being compromised because the current R25 user has extensive database access privileges. (R25 SQL logon scripts cannot be run during Crystal access.)</p>
Resources	Group Rights	<p>The default assignment policy, by group, for resources.</p>	<p>Specifying meaningful defaults can speed up the process of defining the assignment policy at the object level.</p>
SQL Options	NA*	<p>SQL statements you want executed during database user logon/logoff and maintenance.</p>	<p>To customize checks and processing for database user activities.</p>
Schedule25	<i>all</i>	<p>Schedule25 processing options (if you're using Schedule25 with R25).</p>	<p>To format class/event data for room assignment by Schedule25.</p>
Security Policies	NA*	<p>Whether object-level security applies to your system, and to access default object permission forms. Also, to set rules for user password updates, and to limit system access.</p>	<p>To initialize basic security settings and defaults.</p> <p>Described in detail in <i>R25: Security and Business Practices</i>.</p>

Use this option...	And this tab...	To specify...	For this reason...
Spaces	Group Rights	The default assignment policy, by group, for spaces.	Specifying meaningful defaults can speed up the process of defining the assignment policy at the object level.
vCalendar	<i>all</i>	vCalendar processing options.	To format class data for communication with your SIS.

*Not Applicable; the form does not use tabs.

System defaults

These system defaults can be initialized for all R25 users by your system administrator and modified by end users in their user preferences. The settings are described in more detail in the online help for the form (press F1).

Use this option...	And this tab...	To specify...
Contacts	Forms	Defaults for viewing data from the contact directory, and for "quick searching" for contacts.
	Index	How to subdivide the contact list for quicker access.
	Name	How users see contact names displayed.
Date/Time	Entry	How users enter date/time information.
	Format	How date/time information is displayed.
	Office Hours	The hours and weekdays your office is open, and the starting day of your work week. The hours users enter here affect the time range for display of data in event usage views.

Use this option...	And this tab...	To specify...
Display	General	How columns in lists are sized for display and when fresh data is generated for searches and task views. Also, whether the user's object user preference will determine the view that's generated when they "view events" for items selected in a directory, or whether R25 will reuse their most recent view option settings.
	Startup	The forms that open when users log onto R25.
Email	Preferences	The signature text to append to all email messages users send from R25, and whether users receive a copy of each message in their email system.
Events	Forms	Defaults for viewing event data from the directory, and for "quick searching" for events.
	Directory	The tab that opens when users open the event directory, and whether past and/or future cabinets, folders, and events—and cancelled events—are hidden from view on the Cabinets tab.
	Edit Event	How users view data on the Edit Event form. (The settings apply to SpeedBook, too, where data exists.)
	SpeedBook	Default form settings when users start creating an event, including the object security to apply to the event drafts created by a security group.
	Primary Organization	How you want R25 to handle a change to the primary organization—what to do with the old primary organization and whether to change the billing and rate group (or whether you want schedulers to be able to make the decision interactively, on a "by event" basis).
My R25	NA*	Which data users see in their My R25, and in what order; also history and form update rules.

Use this option...	And this tab...	To specify...
Organizations	Forms	Defaults for viewing data in the organization directory, and for “quick searching” for organizations.
	Index	How to subdivide the organization list for quicker access.
Rate Schedules	Forms	Defaults for viewing rate schedules in the rate schedule directory.
	Index	How to subdivide the list of rate schedules for quicker access.
Reporting	Defaults	Defaults for viewing reports in the report directory.
	Index	How to subdivide the reports list for quicker access.
Resources	Forms	Defaults for viewing data in the resource directory, and for “quick searching” for resources.
	Index	How to subdivide the resource list for quicker access.
Spaces	Forms	Defaults for viewing data in the space directory, and for “quick searching” for spaces.
	Index	How to subdivide the space list for quicker access.
	Capacities	How to arrange the spaces by capacity.

*Not Applicable; the form does not use tabs.

Note The “system” settings for an R25 WebViewer URL are specified in the user preferences for the R25 user seat dedicated to the R25 WebViewer installation. For information on these settings, see [Appendix A](#) of the *R25 User Guide* and the *R25 WebViewer Installation and Customization* manual.

