



System Common Functionality (v4 Online)

last updated for the Spring 2016 release

Handbook

CAPITA

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Contacting the Service Desk

You can log a call with the Service Desk via the Customer Service tool available on [My Account](#).

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

onepublications@capita.co.uk

Please ensure that you include the document name, version and aspect of documentation on which you are commenting.

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01 / One v4 Online - System Common Functionality

Overview

One v4 is a Management Information System that is used for a Local Authority's day-to-day administration, management and the monitoring of performance data. Each module can operate independently, as free-standing software solutions to meet the needs of separate departments.

Some of these processes and functions are shared between the One modules in v4 Online and v4 Client.

Using this Handbook

This handbook is intended for One Administrators and users of the One v4 Online system. It details the processes that are common to many of the modules in v4 Online.

A number of reference guides have been produced to assist you with the processes in One. This handbook explains, in more details, the common processes described in the reference guides. For more information, see [Reference Guides](#) on page 3.

The following common functionality in v4 Online is described in this handbook:

- Alerts
- Linked Documents
- Linked Reports
- Memo
- SQL Mail Merge
- UDF Management.

Although the functionality is the same in the One v4 Online system, the interface varies according to the module as follows:

- **CSS and Governors.** For more information, see [Common Functionality in CSS/GOVS](#) on page 4.
- **Transport Back Office.** For more information, see *Common Functionality in [Transport Back Office](#)* on page 26.
- **A&T Back Office, Applications, Bases, Music Tuition and Training Manager.** For more information, see *Common Functionality [A&T Back Office / Applications / Bases / Music Tuition / Training Manager](#)* on page 41.

Reference Guides

A number of reference guides have been produced to assist you with the processes in One v4 Online. Where a reference guide is available, it is displayed as an additional resource.

Additional Resources:

RG_OL_CSS_Equipment available on [My Account](#) and the One **Publications** website (www.onepublications.com).

My Account

The *One Reference Guides* document is available in the **Sticky Items** section of the [My Account](#) home page. This lists the available reference guides and their resource numbers. The list highlights newly added reference guides and guides that have been updated (updated reference guides may have a new resource number). Click on the **Resource No.** link to view the latest version of the reference guide.

To access the reference guides via My Account:

1. Select the **Knowledge Base** tab to display the **Knowledge Base | Popular Searches** page.
2. Select the **Sticky Items** link to display the **Search Results** page. The *One Reference Guides* document is available in the **Documents** list.

NOTE: Please ensure you are always working from the latest version.

All of the reference guides are available on My Account. Enter the Resource_ID number in the **Search** box to view a reference guide.

One Publications

The reference guides are also available on the **One Publications** website (www.onepublications.com). Each release is given a different number to enable you to access the website. The number is available in the Release Notes document that is posted with each new release.

To access the reference guides via **One Publications**:

1. Open the latest version of the **One Publications** website (www.onepublications.com/<123456/>) to display the **Documentation Centre** page.
2. Select the **Reference Guides** tab to display the list of One modules.
3. Click the **One Reference Guides** link to display the *One Reference Guides* list. This document contains the names of all the reference guides, with their Resource_ID for My Account.
4. Select a module to display the latest version of all related reference guides.

02 / Children's Social Services / Governors

Common Functionality in CSS/GOVS

There are a number of common functions in One v4 Online CSS and Governors:

- Alerts
- Linked Documents
- Linked Reports
- Memo
- SQL Mail Merge
- UDF Management.

Alerts

The **Alerts** button displays in many areas of v4 Online. In v4 Online, alerts are stored against individual records and entities. The **Alerts** functionality enables you to add pop-up messages to a specific context, e.g. a person or a student record that is displayed each time the record is opened.

Alerts are created in v4 Online according to the area where the **Alert** button is available.

Important Note:

If a student is made inactive in v4 Client and the reason is **Deceased**, then when the record is opened for that student in v4 Online, the following system generated alert message displays: **Alert - <Student Name> is deceased.**

Additional Resources:

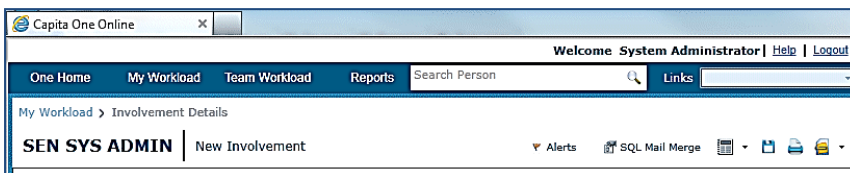
RG_Online_Common_Alerts Button
RG_Administration_System Alerts

available on [My Account](#) and the **One Publications** website (www.onepublications.com).

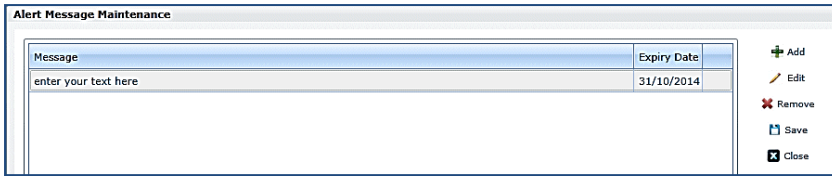
Creating an Alert

To create an alert in CSS or Governors:

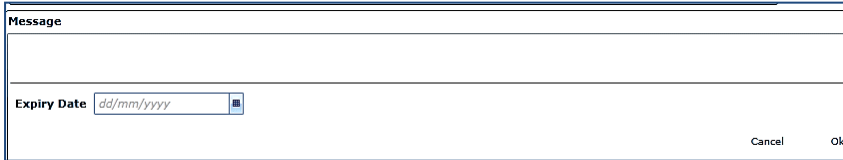
1. In **v4 Online | CSS**, select an entity to create the alert, e.g. **My Workload | Involvement Details**.



2. Click the **Alerts** button to display the **Alert Message Maintenance** dialog. Existing alerts, with the most recent at the bottom, are displayed in the list.



3. Click the **Add** button to display the **Message** panel.
4. Enter the text to display in the alert pop-up in the **Message** field.

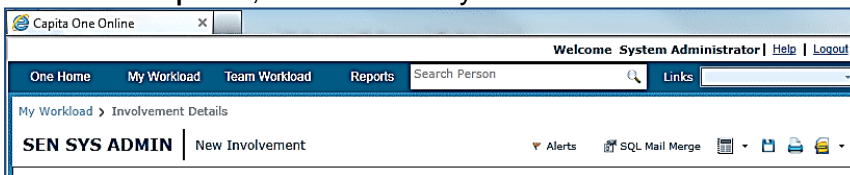


5. If required, select the **Expiry Date** from the calendar drop-down. The expiry date must be in the future.
6. Click the **OK** button to return to the **Alert Message Maintenance** dialog.
7. Click the **Save** button to display the **Alert Message Saved** confirmation.
8. Click the **OK** button to close the **Alert Message Saved** confirmation.
9. Click the **Close** button to return to the main page.

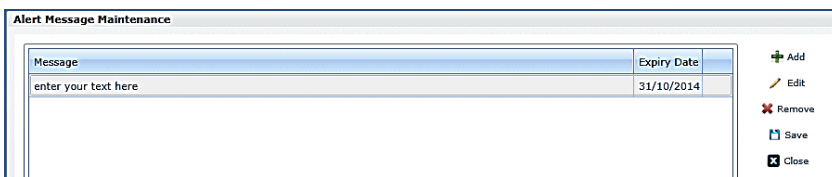
Deleting an Alert

To delete an alert in CSS or Governors

1. In **v4 Online | CSS**, locate the entity where the alert was created.



2. Click the **Alerts** button to display the **Alert Message Maintenance** dialog. Existing alerts, with the most recent at the bottom, are displayed in the list.

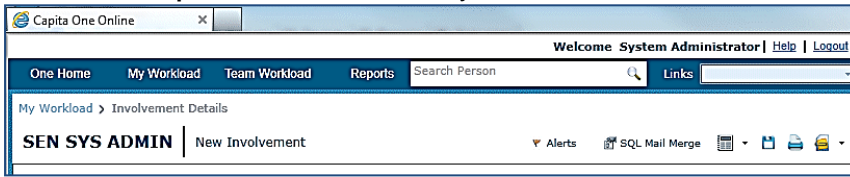


3. Highlight the required alert message.
4. Click the **Remove** button. There is no confirmation dialog.
5. Click the **Save** button.
6. Click the **Close** button to return to the main page

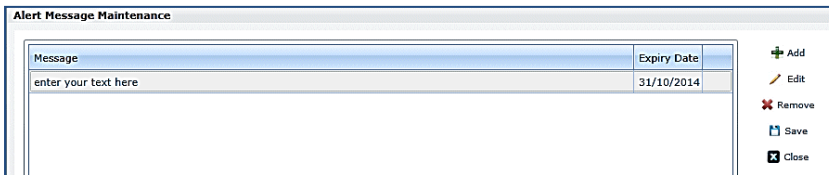
Editing an Alert

To edit an alert in CSS or Governors

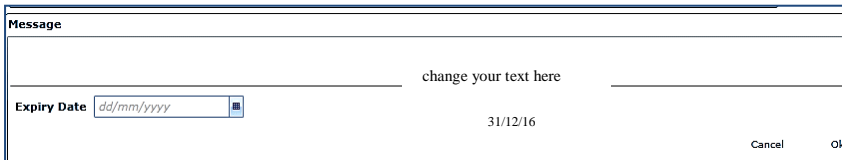
1. In **v4 Online | CSS**, locate the entity where the alert was created.



2. Click the **Alerts** button to display the **Alert Message Maintenance** dialog. Existing alerts, with the most recent at the bottom, are displayed in the list.



3. Highlight the required alert message and click the **Edit** button to display the **Message** panel.



4. Make the required changes.
5. Click the **OK** button.
6. Click the **Save** button.
7. Click the **Close** button to return to the main page.

Linked Documents

The **Linked Documents** functionality is available in v4 Online in **CSS** and **Governors**.

Linked documents or linked files are related documents, letters or reports etc. A document can be linked to a particular entity. A linked file, for example, could be a report attached to a **Communication Log** item.

As well as linking documents, you are able to choose if you want the linked file to be uploaded to the One database, making it available for other users.

The maximum size for an uploaded file is 150 MB. If the selected files size is greater than the permitted upload limit, the file can be linked, but it cannot be uploaded and the following message is displayed:

The file *filename.txt* that you are trying to upload is larger than the maximum permitted size of 150 MB.

Important Note:

When a file is opened, a copy is stored in the **Windows | Downloads** area on the client PC. These files are not automatically removed. We recommend that you regularly clear the list of your downloads.

When a file is saved, a copy is stored on the **Users | Downloads** area on the client PC. These files are not automatically removed. We recommend that you regularly delete copies of files which are automatically retained on the client PC.

Additional Resources:

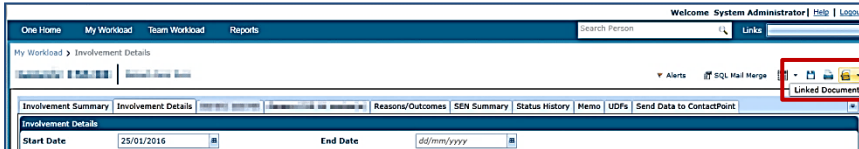
RG_Online_Common_Linked Documents

available on [My Account](#) and the **One Publications** website (www.one publictions.com).

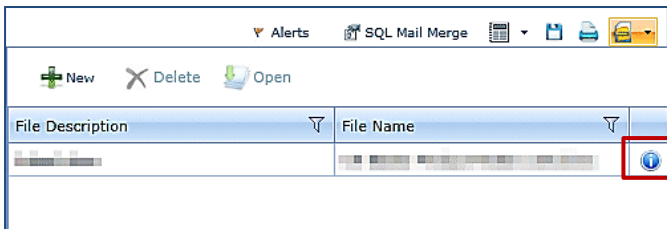
Adding a Linked Document

To link a file or document to an entity in CSS or Governors:

1. In v4 Online, select an entity to which you want to link the document, e.g. **CSS | My Involvements** to display the **Involvement Details** page.



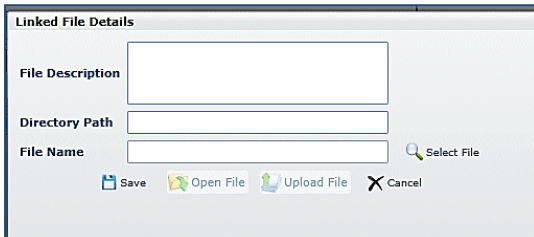
2. Click the **Linked Documents** button to display the **File** dialog. Existing linked files are displayed in the list.



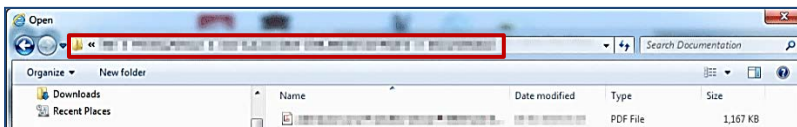
Note:

Hover the mouse over the **Information** button to display **Linked By**, **Updated By** and **Uploaded By** details.

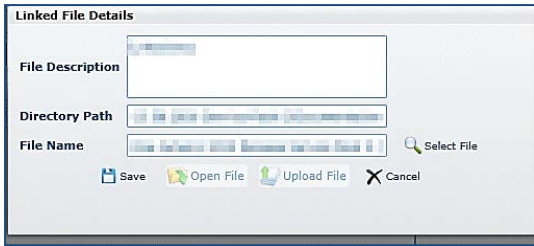
3. Click the **New** button to display the **Linked File Details** dialog



4. Enter a **File Description**.
5. Click the **Select File** browse, next to the **File Name** field, to display the **Open** dialog.



6. Locate the file you wish to link to the entity.
7. You must copy the location of the file now.
8. Click the **Open** button at the bottom of the dialog.
9. Paste the location of the file into the **Directory Path** field.



10. Click the **Save** button.

The following message is displayed:

Do you want to upload the linked document now?

11. Click the **Yes** button to upload the document now.

A message informs you that the linked file has been saved and uploaded.

A linked file does not have to be uploaded when it is saved. For more information on uploading a file, see [Uploading a Linked File](#) on page 1.

12. Click the **Close** button on the **Linked File Details** dialog.

Uploading a Linked Document

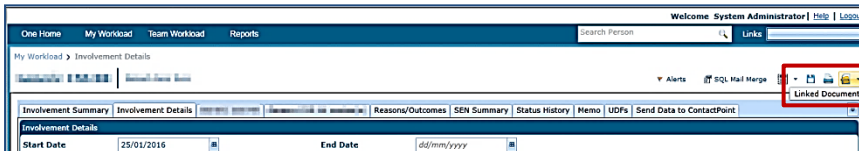
A linked file does not have to be uploaded to the One database when it is saved; it can be uploaded at a later date.

Note:

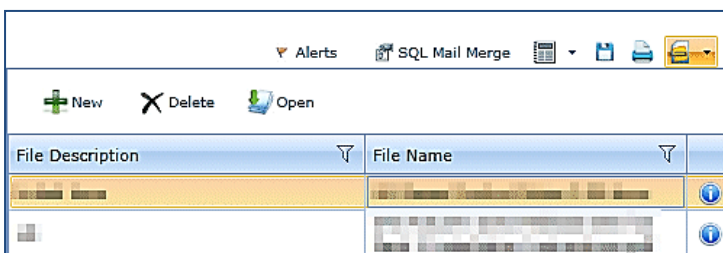
Hover the mouse over the **Information** button to locate a file that has not been uploaded.

To upload a linked file in CSS or Governors:

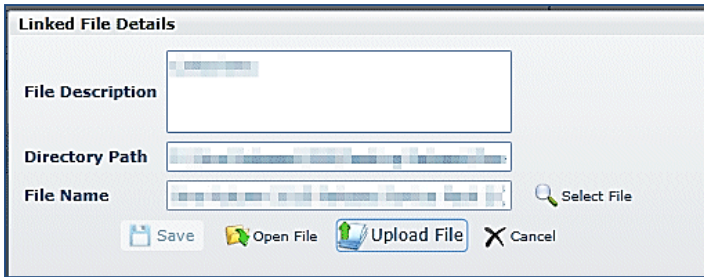
1. In v4 Online, select the entity where the linked file has been saved, e.g. **CSS | My Involvements | Involvement Details**.



2. Click the **Linked Documents** button to display the **File** dialog. Existing linked files are displayed in the list.



3. Highlight a file that has not been uploaded and click the **Open** button to display the **Linked File Details** dialog.



4. Click the **Upload File** button to display the **Open** dialog.
5. Locate the file to be uploaded.
6. Click the **Open** button. The following confirmation message is displayed:
Linked file uploaded.
7. Click the **OK** button on the confirmation pop-up.
8. Click the **Close** button on the **Linked File Details** dialog.
9. Click the **Close** button on the **Linked Documents** dialog.

The **Information** button displays the date, time and name of the person who uploaded the file.

Important Note:

When a file is opened, a copy is stored in the **Windows | Downloads** area on the client PC. These files are not automatically removed. We recommend that you regularly clear the list of your downloads.

When a file is saved, a copy is stored on the **Users | Downloads** area on the client PC. These files are not automatically removed. We recommend that you regularly delete copies of files which are automatically retained on the client PC.

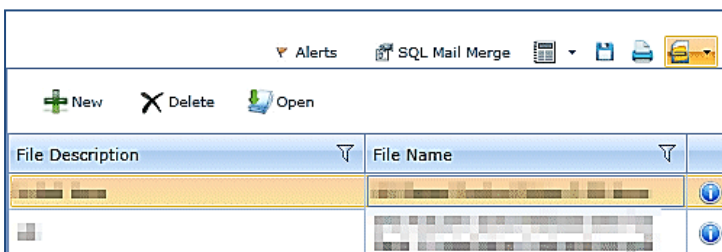
Deleting a Linked Document

To delete a linked file in CSS or Governors:

1. In v4 Online, select the entity where the linked file has been saved.



2. Click the **Linked Documents** button to display the **File** dialog. Existing linked files are displayed in the list.



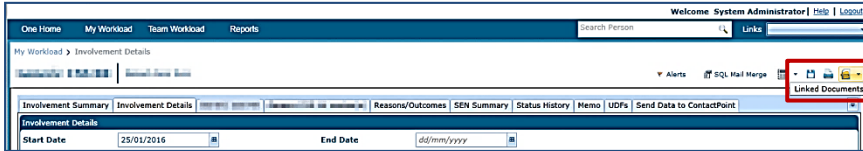
3. Select the file and click the **Delete** button to display the following confirmation message:
Are you sure you want to delete this Linked Document?
4. Click the **Yes** button; a message confirms that the linked document has been successfully deleted.
5. Click the **OK** button.

Editing a Linked Document

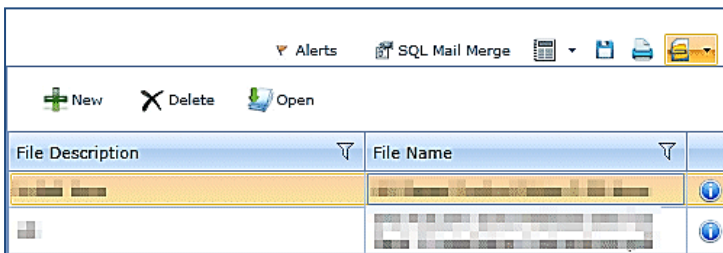
A linked file must be uploaded before it can be opened for editing purposes. The document cannot be edited within One v4 Online; it must be done outside One v4 Online and re-uploaded.

To edit a linked file in CSS or Governors:

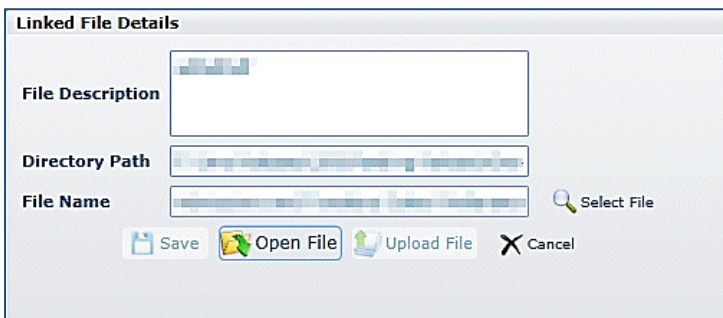
1. In v4 Online, select the entity where the linked file has been saved.



2. Click the **Linked Documents** button to display the **File** dialog. Existing linked files are displayed in the list.



3. Select the file and click the **Open** button to display the **Linked File Details** dialog.



4. Click the **Open File** button; the following warning message is displayed:

Perform a **Save As** on the file once editing has been completed, in order to identify the file location.

Use **Select File** to then re-select the edited file in order to complete the re-upload of the edited file.

5. Click the **OK** button.
6. Click the **Open** button to make the changes to the required file.
7. Save the file.
8. Click the **Select File** button to re-select the edited file.
9. Click the **Save** button.

A message asks you to confirm that you wish to replace the original file.

10. Click the **Yes** button; a confirmation pop-up confirms the file has successfully updated.
11. Click the **OK** button.
12. Click the **Close** button on the **Linked File Details** dialog.

Important Note:

When a file is opened, a copy is stored in the **Windows | Downloads** area on the client PC. These files are not automatically removed. We recommend that you regularly clear the list of your downloads.

When a file is saved, a copy is stored on the **Users | Downloads** area on the client PC. These files are not automatically removed. We recommend that you regularly delete copies of files which are automatically retained on the client PC.

Linked Reports

The **Linked Reports** button is available from specific records within v4 Online via CSS and Governors. It enables you to run a Crystal report in context of the individual record.

A system administrator must grant report permissions via **Tools | Permissions | User Group Processes | Administration**.

Permissions to run individual reports are granted via **Tools | Permissions | Report Permissions**.

Once permissions have been granted, available and submitted reports can be viewed via the **Reports Manager** area. For more information, see [Viewing Available Reports](#) on page 13 and [Viewing Submitted Reports](#) on page 13.

A linked report may be configured to accept a default parameter. If no other parameters are present, the report runs without prompting for other parameters. If the report contains multiple parameters, including the one passed from the screen, the **Report Parameters** dialog is displayed with the passed parameter pre-populated.

Additional Resources:

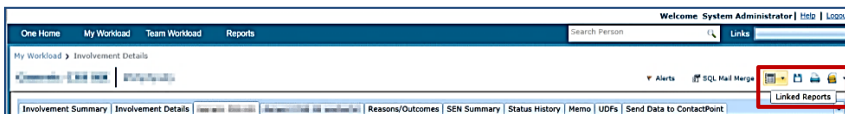
- RG_Online_Common_Reports*
- RG_Permissions_Report Permissions*
- RG_Permissions_User Group Processes*

available on [My Account](#) and the One Publications website (www.onepublications.com).

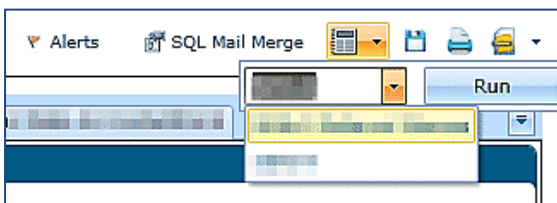
Using Linked Reports

To run a linked report in CSS or Governors:

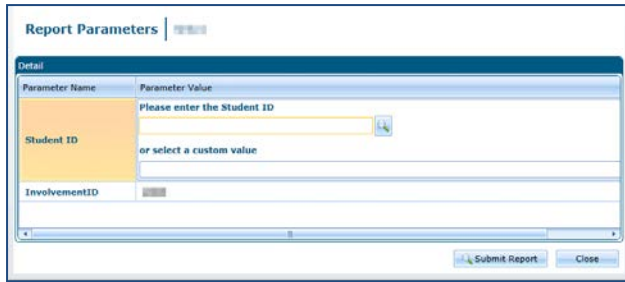
1. In v4 Online, select an entity to which you want to link a report, e.g. **CSS | My Involvements** to display the **Involvement Details** page.



2. Click the **Linked Reports** button to display the reports browse.







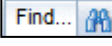

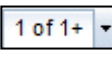
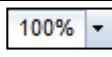
3. From the browse drop-down, select the required report.
4. Click the **Run** button to display the **Report Parameters** dialog.



5. Select a **Parameter Name** and enter the required **Parameter Value**.
6. Click the **Submit Report** button. The SAP Crystal report opens in a new browser window.



The toolbar at the top of the report enables you to navigate through the report.

	Click the Group Tree button to display the Group Tree panel. This panel lists all of the records contained in the report.
	<ol style="list-style-type: none"> 1. Click the Print Report button to display the Print dialog. 2. Select the required printing options. 3. Click the Print button.
	The Drill Up button is not used in Capita One Crystal reports.
	<ol style="list-style-type: none"> 1. Click the Export this Report button to display the Export dialog. 2. Select a file format. 3. Select the page range to be printed. 4. Click the Export button to display the Save As dialog. 5. Enter a File name. 6. Select <i>RPT File (*.rpt)</i> as the Save as Type. 7. Click the Save button.
	<p>To search for text in the report:</p> <ol style="list-style-type: none"> 1. Enter the text in the Search for text field. 2. Click the Search for text button. The results are highlighted.
	Click the Go to Previous Page and Go to Next Page buttons to navigate through the report, page by page.
	<p>To navigate to a particular page:</p> <ol style="list-style-type: none"> 1. Enter a page number in the Page Navigation field. 2. Click the Enter button on your desktop. 3. Click the drop-down to access the Go to First Page and Go to Last Page navigation options.
	Select the drop-down on the Zoom field and select a zoom factor between 25% and 400 %.

To view a submitted report in v4 Online, select **CSS | Reports | Reports Manager | Submitted Reports**. For more information, see [Viewing Submitted Reports](#) on page 13.

Reports Manager

The **Reports Manager** functionality is available in v4 Online via CSS and Governors.

Access to the **Reports Manager** page is granted via **Tools | Permissions | User Group Processes**.

The **Reports Manager** page is accessed in v4 Online via the **Reports** area. It enables you to manage the following types of reports:

- **Available Reports** – from here you can run any reports for which you have been granted permission.
- **Submitted Reports** – from here you can view a summary of the reports that you have submitted.

Additional Resources:

RG_Permissions_User Group Processes
RG_Permissions_Report Permissions
RG_Online_Common_Reports

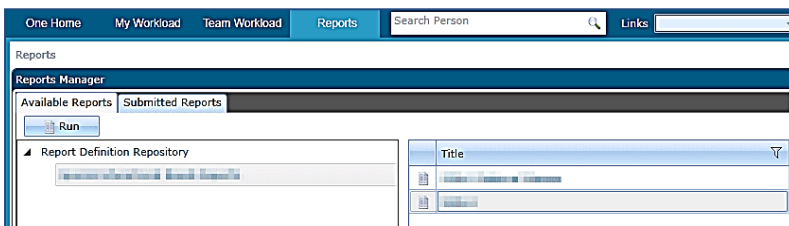
available on [My Account](#) and the **One Publications** website (www.one publictions.com).

Viewing Available Reports

The **Available Reports** sub-tab displays the reports that the user has been granted access to via **Tools | Permissions | Report Permissions**.

To view the available reports:

1. In v4 Online, select **CSS | Reports | Reports Manager | Available Reports** to display the **Report Definition Repository** panel.



2. Select the module area from the **Report Definition Repository** tree and select a **Title**.
3. Click the **Run** button to display the available report in a new browser window.

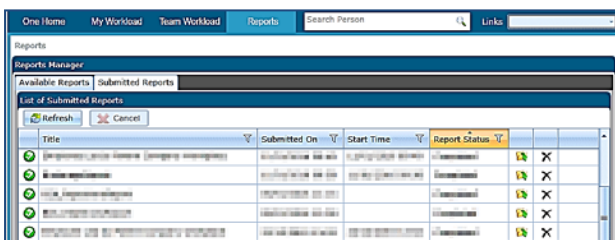
Viewing Submitted Reports

The **Submitted Reports** sub-tab displays a browse list of previously generated reports.

To view a submitted report:

1. In v4 Online, select **CSS | Reports | Reports Manager | Submitted Reports** to display the **List of Submitted Reports** page.

The page refreshes automatically, but can be updated manually by clicking the **Refresh** button.



2. Double-click a submitted report to display it in a new browser window. You can also click the folder icon to open a report.

As a report is generated, the **Report Status** field is updated and the status icon next to the **Title** displays as shown in the table below.

Icon	Report Status
	Not Started – the report may be in a queue.
	Executing – the report is running, you cannot view the report at this stage.
	Completed – the report is ready to view and can be printed.
	Error – the report has not completed, check the report parameters, then re-submit.

Memo

The **Memo** functionality is available at various locations throughout v4 Online CSS and Governors. The memo in these modules is displayed as a tab.

A memo enables you to add relevant information to an entity for later reference.

Additional Resources:

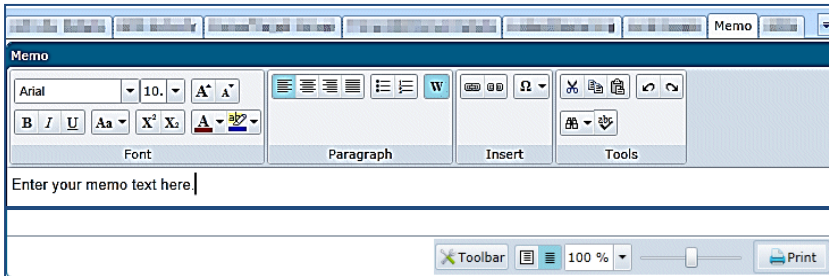
RG_Online_Common_UDFs_Memo

available on [My Account](#) and the **One Publications** website (www.onepublications.com).

Adding a Memo

To add a memo in v4 Online CSS or Governors:

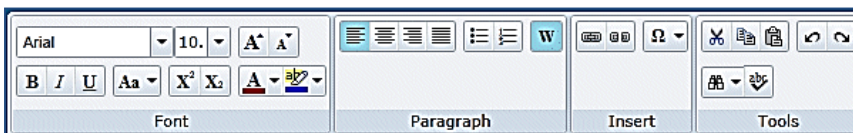
3. In v4 Online, select an entity you wish to record a memo for, e.g. **CSS | Involvements**.
1. Select the **Memo** tab to display the **Memo** dialog.









2. Enter the relevant text and format as required. For more information, see [Formatting a Memo](#) on page 14.
3. Click the **Save** button.

Formatting a Memo

The **Memo** dialog uses standard word processor controls to allow for rich text formatting. Hovering over an icon displays the tooltips.

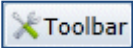

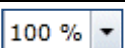

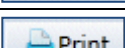


Font	Times New Roman 10.	Font, Font Size
	A ⁺ A ⁻	Grow Font, Shrink Font
	B <i>I</i> <u>U</u>	Bold, Italic, Underline
	Aa	Change Case
	X ² X ₂	Superscript, Subscript
	A (color) highlight	Font Colour, Highlight
Paragraph	Align icons	Align Text
	Bullets, Numbering icons	Bullets, Numbering
	W	Text Wrapping

Insert		Insert Hyperlink
		Insert Symbol
Tools		Cut, Copy, Paste
		Undo, Redo
		Find, Replace
		Spell Check

Use the buttons at the bottom of the **Memo** dialog for the following formatting options. Hovering over an icon displays the tooltips.



	Click to show or hide the Toolbar.
	Click to select print or draft layout.
	Set the zoom magnification level.
	Slide to zoom in and out of memo.
	Click to print the memo.

SQL Mail Merge

Important Note:

SQL should only be carried out by a system administrator who is fully aware of its implications. Capita cannot accept responsibility for data problems caused as a result of following this advice incorrectly.

The primary function of the **SQL Mail Merge** facility is to create a file of exported data on the basis of an SQL `select` query, typically for use in a mail merge Word document. The data may also be used for analysis in Excel, for example. Only SQL statements that begin with the word `select` are allowed. All other commands such as `Update`, `Insert` or `Delete` are prohibited and will fail validation.

Once the file is create, you can export the data to a nominated file folder on the system's network or to a local machine. The system administrator nominates which users and user groups may initiate the query.

SQL mail merge is set up in v4 Online via **Administration | SQL Mail Merge**. For more information, see [Using the SQL Mail Merge Button](#) on page 19.

The **SQL Mail Merge** button is available in many areas of v4 Online CSS and Governors, but this only enables you to preview and export queries that have been set up in v4 Online via **Administration| SQL Mail Merge**. For more information, see [Using the SQL Mail Merge Button](#) on page 19.

Additional Resources:

- RG_Online_Administration_Creating SQL Mail Merge*
- RG_Online_Common_SQL Mail Merge Button*
- RG_Administration_SQL Mail Merge*

available on [My Account](#) and the One Publications website (www.one publictions.com).

Setting up SQL Mail Merge

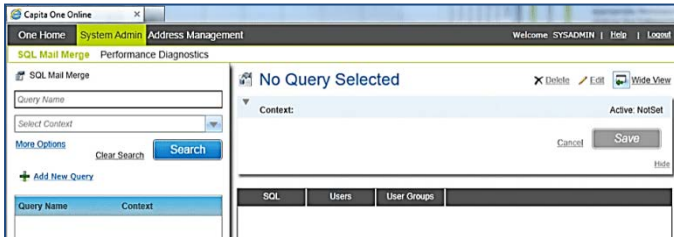
SQL mail merge is set up in v4 Online via **Administration | SQL Mail Merge**.

The primary function of this facility is to create a file of exported data on the basis of an SQL select query, typically for use in a mail merge Word document.

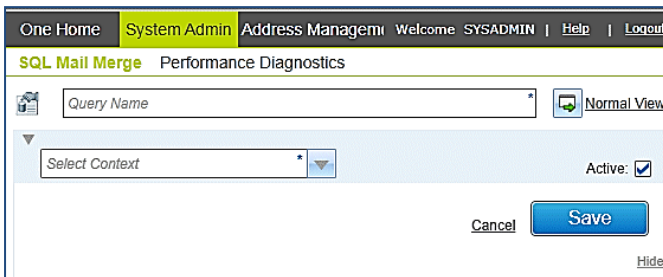
The system administrator nominates which users and user groups may initiate the query.

To create a new SQL mail merge query:

1. In v4 Online, select **Administration** to display the **System Admin** tab, **SQL Mail Merge** is the default page.



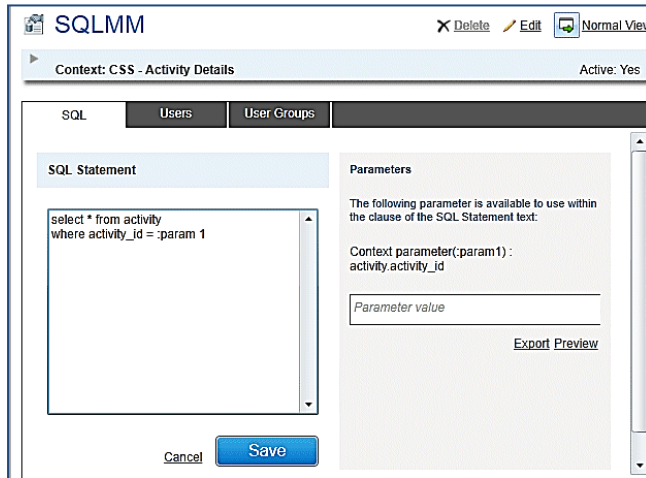
2. Click the **Add New Query** button to display the **Contexts** fields.
3. Enter the **Query Name**, this is a mandatory field.



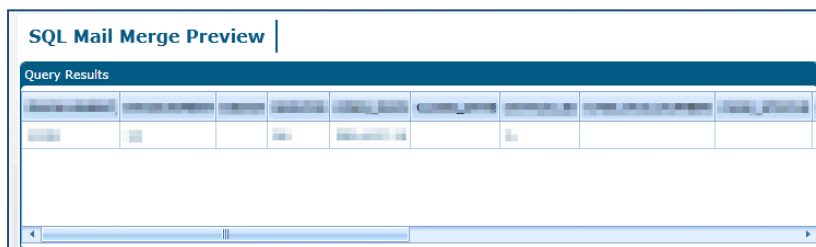
4. Select the **Context** from the drop-down list, this is a mandatory field.
5. Select the **Active** check box to activate the query.
6. Click the **Save** button. The following message is displayed:
SQL Mail Merge definition saved.
7. Click the **OK** button to display the **SQL Statement** box.

Adding the SQL Statement

After the **SQL Mail Merge** definition has been saved, you need to add the **SQL Statement**.



1. Enter the query in the **SQL Statement** box (only Select statements are allowed).
To help you with the query, a list of parameters display in the **Parameters** panel. The list is populated when the **Context** is selected.
2. If required, enter a **Parameter Value**.
3. Click the **Save** button. A message informs you that the SQL Statement has been saved.
4. Click the **Preview** button to display the **SQL Mail Merge Preview Query Results** dialog. You may need to use the scroll bar to view all of the results.



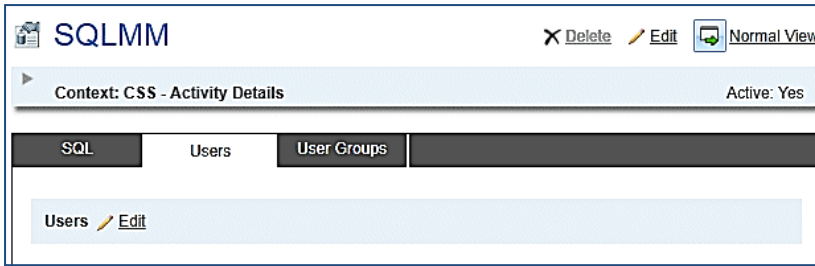
5. Click the cross at the top of the **SQL Mail Merge Preview** dialog.
6. Click the **Export** button to display the **Save As** dialog.
7. Select a location to save your exported file.
8. Enter a **File Name**.
9. Click the **Save** button. A message informs you that the CSV file has generated successfully.
10. Click the **OK** button.

Adding Users

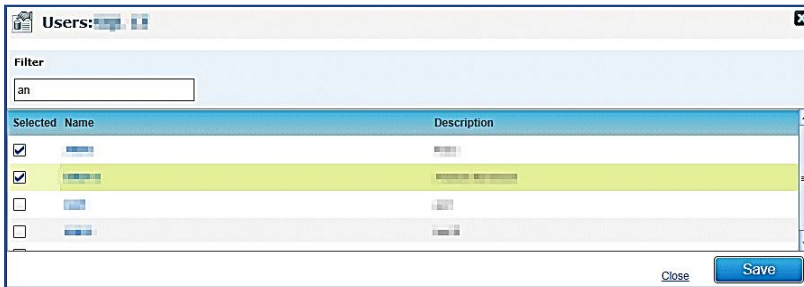
Users and/or groups need to be added to the SQL mail merge. Only users and groups that have been added to the list can run the mail merges.

To add users:

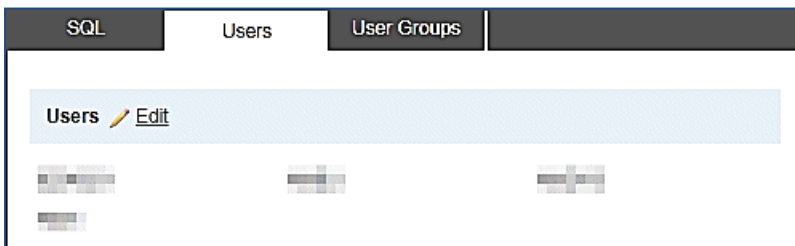
1. Click the **Users** tab to display the **Users/Edit** panel.



2. Click the **Edit** button to display the **Users** dialog.
Use the **Filter** field to narrow your search.



3. Select the check box next to the required users.
To remove a user from the SQL mail merge, deselect the check box next to their name.
4. Click the **Save** button.
5. Click the cross at the top of the **Users** dialog. The list of users is displayed in the **Users/Edit** panel.

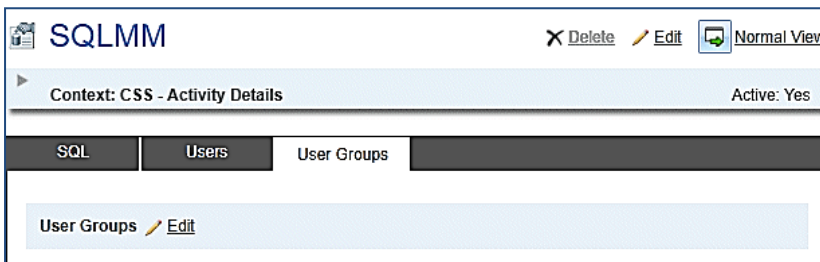


Adding Groups

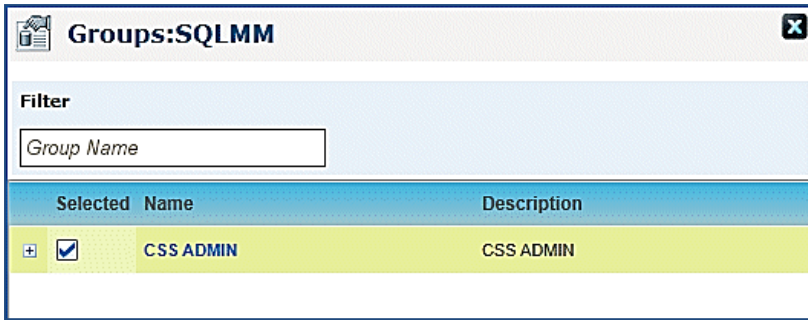
Users and/or groups need to be added to the SQL mail merge. Only users and groups that have been added to the list can run the mail merges.

To add groups:

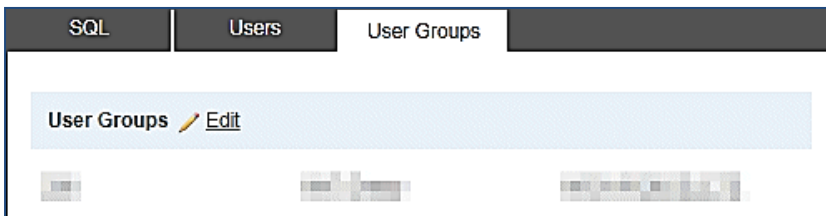
1. Click the **User Groups** tab to display the **User Groups/Edit** panel.



2. Click the **Edit** button to display the **Groups** dialog.
Use the **Filter** field to narrow your search.



3. Select the check box next to the required users.
To remove a user from the SQL mail merge, deselect the check box next to their name.
4. Click the **Save** button.
5. Click the cross at the top of the **Groups** dialog. The list of user groups is displayed in the **User Groups/Edit** panel.



Using the SQL Mail Merge Button

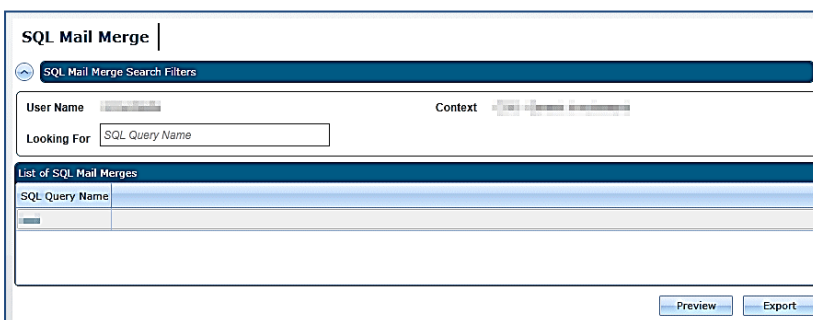
The **SQL Mail Merge** button displays in many areas of v4 Online CSS and Governors. Clicking the **SQL Mail Merge** button only allows you to preview and export existing queries.

To preview and export an existing query:

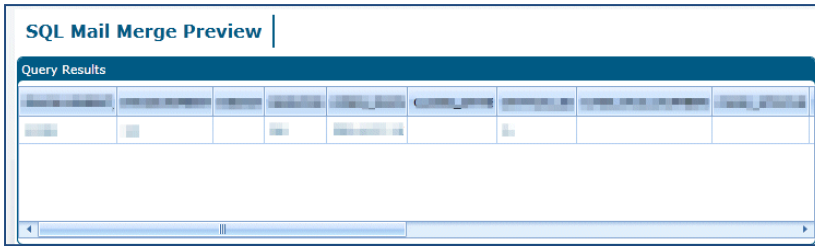
1. In v4 Online, select an entity for which an SQL mail merge has been created.
2. Click the **SQL Mail Merge** button to display the **SQL Mail Merge Search Filters** dialog. Existing alerts for the entity display in the **List of SQL Mail Merges** browse.

The **Context** is populated according to the entity where the **SQL Mail Merge** button was selected.

3. Enter the SQL Query Name in the **Looking For** field to search for the SQL mail merge.



4. Select the required **SQL Query Name** and click the **Preview** button to display the **SQL Mail Merge Preview Query Results** dialog. You may need to use the scroll bar to view all of the results.



5. If you do not wish to export the SQL mail merge, click the cross at the top of the **SQL Mail Merge Preview** dialog.
6. Click the **Export** button to display the **Save As** dialog.
7. Select the location to which you wish to export the SQL mail merge.
8. Enter a **File Name**.
9. Click the **Save** button. The following message is displayed:
 CSC File generated successfully.
10. Click the **OK** button.
11. Click the cross at the top of the **SQL Mail Merge Preview** dialog.

UDF Management

The UDF functionality enables you to add extra fields to accommodate items that One does not store. UDFs can be created against all entities. A UDF can only be used once.

UDFs are set up in the v4 Client via **Tools | Administration | UDF Management** or by clicking the **UDF Manager** button at the top of an **Entity** page in the v4 Client.

UDFs cannot be deleted; they can only be made inactive by removing them from the entity. If a UDF is removed from an entity, it is removed from all records for that entity; this affects all records regardless of when they were created. For more information, see [Removing a UDF](#) on page 24.

A dynamic view is created for each migrated v3 table. The view name is **VIEW_UDF_{V3_TABLE_NAME}**. For example, the BASES table has a dynamic view as VIEW_UDF_BASES.

For reporting purposes, a new UDF is included in the view by clicking the **Compile View** button at the top of the **Tools | Administration | UDF Management** page. This creates the view and displays the following message at the bottom of the page:

View VIEW_UDF_<BASES> is generated successfully.

Additional Resources:

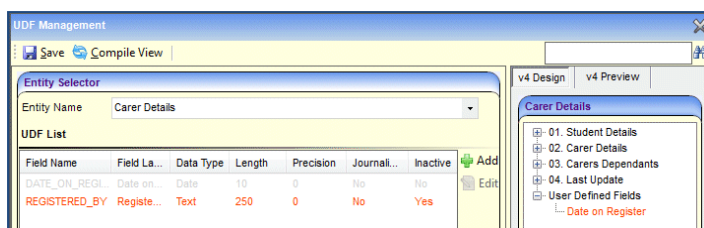
RG_Administration_Managing_UDFs
RG_Online_Common_UDFs_Memo

available on [My Account](#) and the **One Publications** website (www.one publictions.com).

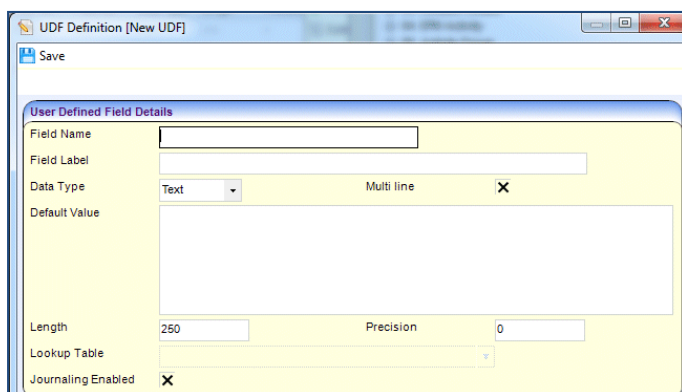
Creating a UDF

To create a new UDF:

1. Select **Tools | Administration | UDF Management** to display the **UDF Management** page.
2. On the **Entity Selector** panel, select the required **Entity Name** from the drop-down list. The **UDF List** displays any UDFs that have already been defined. UDFs that are in use display as grey text. Available UDFs display as red text.



3. Click the **Add** button to display the **UDF Definition** dialog.



4. On the **User Defined Field Details** panel, enter the following UDF details as required:
- i. **Field Name:** This is a unique code name by which the field is known in the database. It contains no spaces, an underscore can be used. It is a free text field up to 30 characters. When the UDF is saved, the file name is added to the UDF table with a prefix of 'U_' to identify the field from those fields that are supplied at the time of installation. The characters are automatically changed to UPPER CASE.
 - ii. **Field Label:** This is a description that enables you to identify the UDF. It is a free text field up to 50 characters. The description may include an indication of the type of entry that is expected, e.g. *FSM? (T/F)*, which indicates that the UDF is a logical field and displays as a check box.
 - iii. **Data Type:** Select from **Text**, **Number**, **Date**, **Logical** or **Lookup**. The remaining fields are dependent upon the data type selected.
 - iv. **Multi Line:** This check box is used only for the **Text** data type. Selecting the check box makes the **Default Value** field scrollable, enabling you to enter multiple lines of text.
 - v. **Default Value:** The following default values are set:
 - b. **Text** – This is a free text field enabling you to enter letters, numbers and symbols according to the **Length**.
 - c. **Number** – Selecting **Number** only allows numerals to be entered into the **Default Value**. The **Default Value** is dependent on the **Length** field. Selecting **Number** activates the **Precision** field, which enables you to set the number of decimal places.
 - d. **Date** – A default value is required only if you wish to set a particular date as a default date.

- e. **Logical** – This field displays in the form of a check box. The default values are T (true) or F (false).
 - f. **Lookup** – Lookups do not have a default value.
 - vi. **Length**: The following are the maximum number of characters allowed:
 - a. **Text**: If **Multi line** has been selected, then this field is user defined up to a maximum of 250 characters. If **Multi line** has not been selected, then the maximum number of characters is 179.
 - b. **Number**: This is a user defined field up to 18 characters. If the **Length** is set to 10, then the **Default Value** can only be a number up to 10 digits.
 - c. **Date**: This requires 10 characters. It must be in the following format: DD/MM/YYYY.
 - d. **Logical**: The number of characters is automatically set to 1.
 - e. **Lookup**: This is a user defined field up to 6 characters. One Lookup Codes require 4 digits.
 - vii. **Precision**: This applies only to the **Number** data type. It is used to record the number of decimal places to be stored in a field. The decimal point and the decimal places are included in the **Length** field.
 - viii. **Lookup Table**: Select a lookup code to which you wish to link the UDF. The field displays as a dropdown from which you can select a user code and description from the relevant lookup.
 - ix. **Journaling Enabled**: Select this check box to make the UDF available for audit tracking. This is available for all data types.
2. Click the **Save** button to return to the **UDF Management** page. The new UDF is displayed in red on the UDF List. It remains inactive until added to an entity. For more information, see [Adding a UDF to an Entity](#) on page 22.

UDF List						
Field Name	Field Label	Data Type	Length	Precision	Journaling ...	Inactive
U_TERM1	Term 1	Text	80		No	No
U_NEXT_OFSTED	Next Ofsted	Date	10		No	No
U_U_EMA	EMA Base	Logical	1		No	No
NEW_UDF	Handbook	Text	250	0	Yes	Yes

Adding a UDF to an Entity

After the UDF has been created, it is added to an entity on the **v4 Design** tab. You can preview the UDF, but you cannot enter any data. For more information, see [Previewing a UDF](#) on page 23

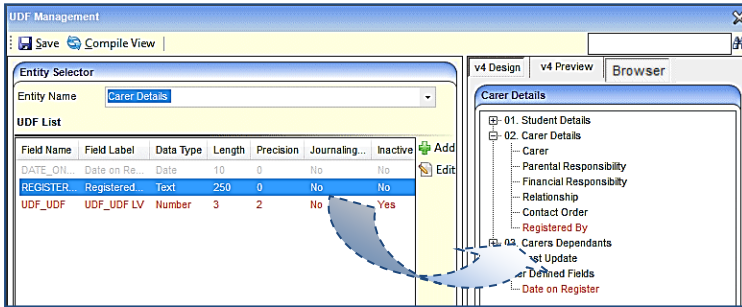
For v4 Online entities, i.e. CIEE and G&B, a separate **Browser** tab is available to add the UDFs. You cannot preview these UDFs.

To add a UDF to an entity:

1. Select **Tools | Administration | UDF Management** to display the **UDF Management** page.
2. Select the required **Entity Name**.

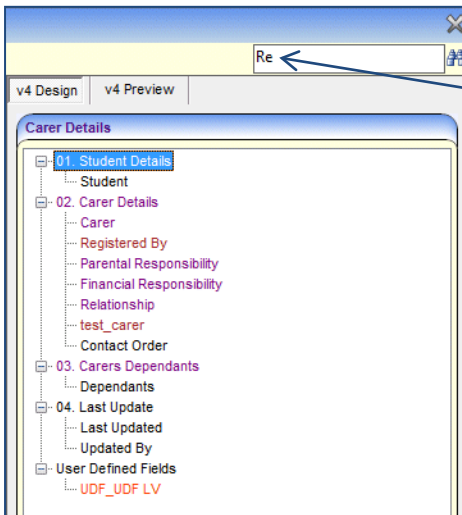
- On the **Entity Selector** panel, drag the UDF from the **UDF List** panel to the **v4 Design** tab.

The **v4 Design** tab lists the details of the selected entity in a tree view. The tree is pre-populated with the panels relating to the selected entity.



Note:

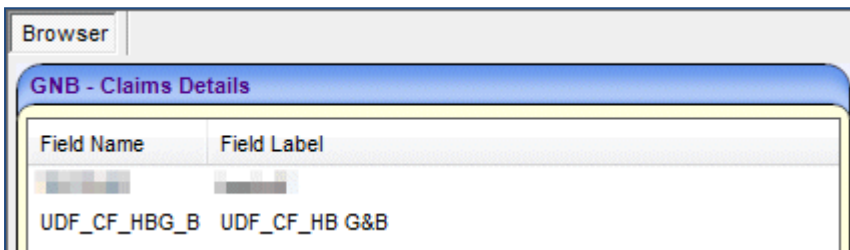
UDFs can be placed in any panel on the tree or in the **User Defined Fields** panel at the bottom of the tree.



The **Search** box enables you to search the navigation tree for a particular field, by entering a few characters or full words. By default, all matched fields are displayed in purple text. If a matched field is a UDF, it is displayed in brown text.

- Click the **Save** button.

For entities that are v4 Online only, i.e. CIEE and G&B, the entity is dragged to the **Browser** tab. However, you cannot preview these UDFs.



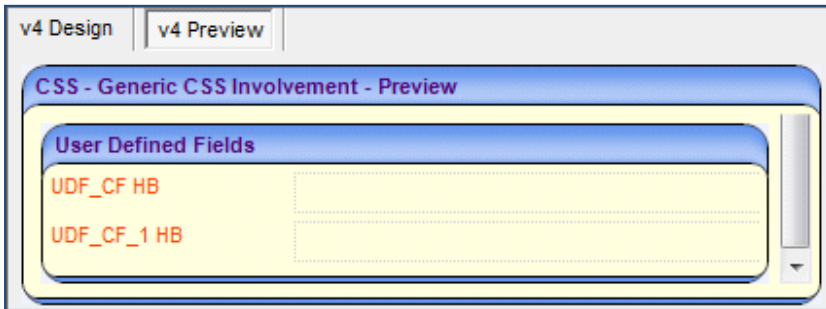
Previewing a UDF

There is no **Preview** tab available for v4 Online. The **v4 Preview** tab is available to enable you to view how the UDF will be displayed on the **Entity** page on a record in the v4 Client. You cannot enter any data on this tab.

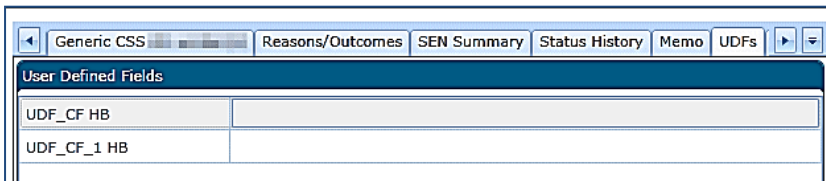
To preview a UDF:

- Select **Tools | Administration | UDF Management** to display the **UDF Management** page.
- On the **Entity Selector** panel, select an **Entity Name**.

- Click the **v4 Preview** tab to display the **<Entity Details> – Preview** panel.



The **UDF** tab in v4 Online displays the UDFs as in the following graphic:



Some fields cannot be displayed in the **v4 Preview** tab. If this occurs, the following message is displayed on the panel:

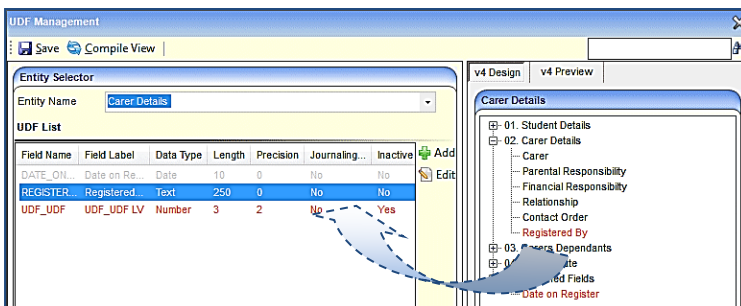
Control cannot be displayed in preview screen.

Removing a UDF

UDFs cannot be deleted; they can only be made inactive by removing them from the entity. If a UDF is removed from an entity, it is removed from all records for that entity; this affects all records regardless of when they were created.

To remove a UDF from an entity:

- Select **Tools | Administration | UDF Management** to display the **UDF Management** page.
- On the **Entity Selector** panel, select the required **Entity Name**.
- Drag the UDF from the **v4 Design** tab to the **UDF List** panel.



The details of the UDF on the **UDF List** panel revert from grey to red text.

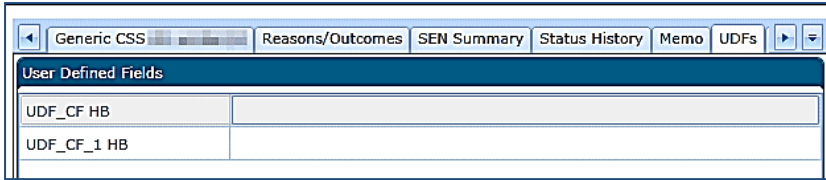
- Click the **Save** button.

Using a UDF

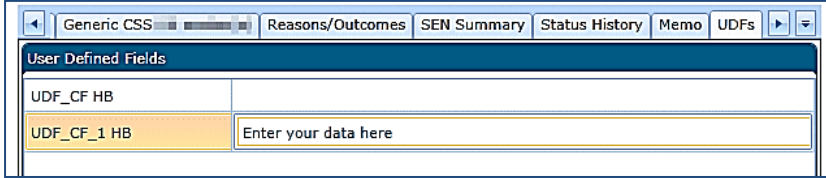
The **UDF** tab is available in v4 Online to manage the UDFs that have been set up in the v4 Client.

To use a UDF:

- In v4 Online, select the entity where you wish to use the UDF, e.g. **CSS | Involvements | Involvement Details | UDFs** to display the **User Defined Fields** panel.



2. Select the field next to the UDF and enter your data.



3. Click the **Save** button.

Additional Resources:

RG_Online_Common_UDFs_Memo
RG_Administration_Managing_UDFs

available on [My Account](#) and the **One Publications** website (www.onepublications.com).

03 / Transport Back Office

Common Functionality

There are a number of common functions in One v4 Online Transport Back Office:

- Alerts
- Linked Documents
- Linked Reports
- Memo
- Reports Manager
- SQL Mail Merge
- UDF Management.

Alerts

The **Alerts** button displays in many areas of v4 Online. In v4 Online, alerts are stored against individual records and entities. The **Alerts** functionality enables you to add pop-up messages to a specific context, e.g. a person or a student record that is displayed each time the record is opened.

Alerts are created in v4 Online according to the area where the **Alert** button is available.

Important Note:

If a student is made inactive in v4 Client and the reason is **Deceased**, then when the record is opened for that student in v4 Online, the following system generated alert message displays: **Alert - <Student Name> is deceased.**

Additional Resources:

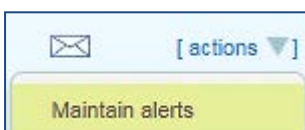
Transport Back Office Handbook
RG_Online_Common_Alerts Button
RG_Administration_System Alerts

available on [My Account](#) and the **One Publications** website (www.one publictions.com).

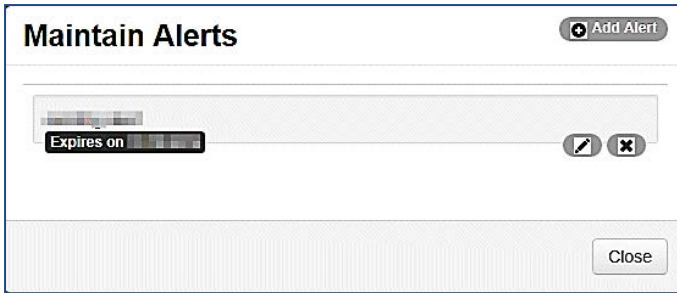
Creating an Alert

To create an alert in Transport Back Office:

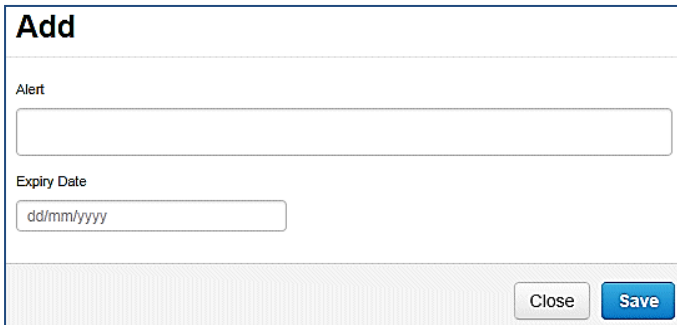
1. In **v4 Online | Transport Back Office**, select an entity to create the alert, e.g. **People | Personal Info**.
2. Click the **actions** drop-down to display the **Maintain alerts** button.



3. Click the **Maintain alerts** button to display the **Maintain Alerts** dialog. Existing alerts are displayed in the list.



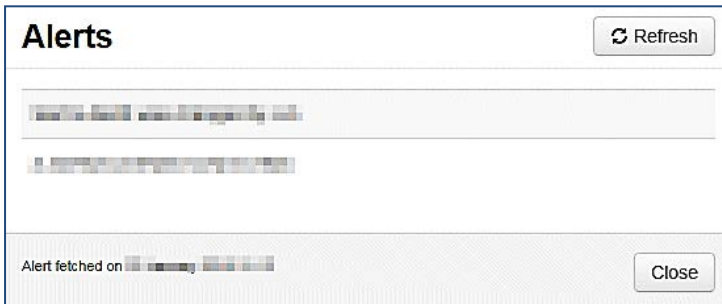
4. Click the **Add Alert** button to display the **Add** dialog.



5. Enter the text to display in the alert pop-up in the **Alert** field.
6. If required, enter an **Expiry** date. The expiry date must be in the future.
7. Click the **Save** button.
8. Click the **Close** button.

An orange **Alerts** warning icon displays above the **actions** button to inform you that alerts have been recorded against this entity.

9. Click the **Alerts** warning icon to display the **Alerts** dialog containing the list of alerts.

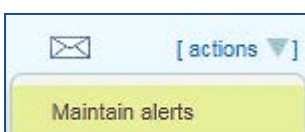


10. Click the **Refresh** button to update the list with any new alerts created by you or other users.
11. Click the **Close** button.

Deleting an Alert

To delete an alert in Transport Back Office:

1. In **v4 Online | Transport Back Office | People | Personal Info**, select a student.
2. Click the **actions** drop-down to display the **Maintain alerts** button.



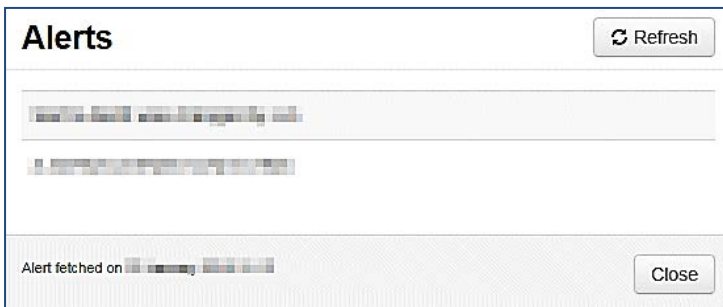
3. Click the **Maintain alerts** button to display the **Maintain Alerts** dialog. Existing alerts are displayed in the list.



4. Click the **cross** button next to the alert to be deleted. A message is displayed confirming that you wish to delete the alert.
5. Click the **Delete** button.
6. Click the **Close** button to return to the main screen.

An orange **Alerts** warning icon displays above the **actions** button to inform you that alerts have been recorded against this entity.

7. Click the **Alerts** warning icon to display the **Alerts** dialog containing the list of alerts.

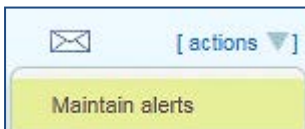


8. Click the **Refresh** button to update the list; the deleted alerts are no longer displayed.
9. Click the **Close** button.

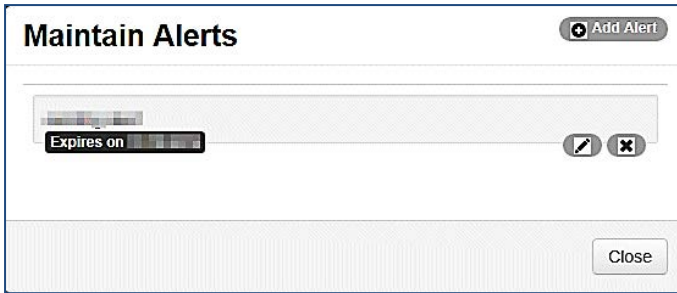
Editing an Alert

To edit an alert in Transport Back Office:

1. In **v4 Online | Transport Back Office | People | Personal Info**, select a student.
2. Click the **actions** drop-down to display the **Maintain alerts** button.



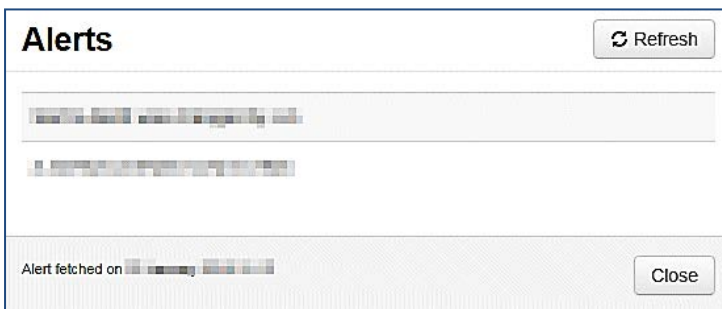
3. Click the **Maintain alerts** button to display the **Maintain Alerts** dialog. Existing alerts are displayed in the list.



4. Click the **pencil** button next to the alert to be edited to display the **Edit** dialog.
5. Make the required changes to the alert; you can change the message and the expiry date.
6. Click the **Save** button.
7. Click the **Close** button to return to the main screen.

An orange **Alerts** warning icon displays above the **actions** button to inform you that alerts have been recorded against this entity.

8. Click the **Alerts** warning icon to display the **Alerts** dialog containing the list of alerts.



9. Click the **Refresh** button to update the list with any alerts that may have been updated or recorded by other users.
10. Click the **Close** button.

Linked Documents

The **Linked Documents** functionality is available in the **Transport Back Office** section of v4 Online.

Linked documents or linked files are related documents, letters or reports etc. A document can be linked to a particular entity. For example, a linked file could be a scan of a signed paper contract to the equivalent One Transport contract record.

As well as linking documents, you are able to choose if you want the linked file to be uploaded to the One database to be available to other users.

The maximum size for an uploaded file is 150 MB. If the selected file's size is greater than the permitted upload limit, the file can be linked, but it cannot be uploaded and the following message is displayed:

The file *filename.txt* that you are trying to upload is larger than the maximum permitted size of 150 MB.

Important Note:

When a file is opened, a copy is stored in the **Windows | Downloads** area on the client PC. These files are not automatically removed. We recommend that you regularly clear the list of your downloads.

When a file is saved, a copy is stored on the **Users | Downloads** area on the client PC. These files are not automatically removed. We recommend that you regularly delete copies of files which are automatically retained on the client PC.

Additional Resources:

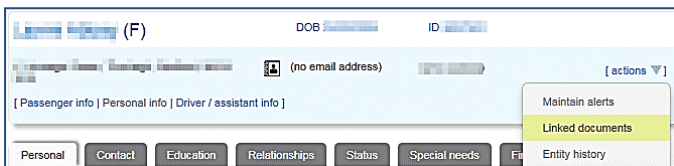
Transport Back Office Handbook
RG_Online_Common_Linked Documents

available on [My Account](#) and the One Publications website (www.onepublications.com).

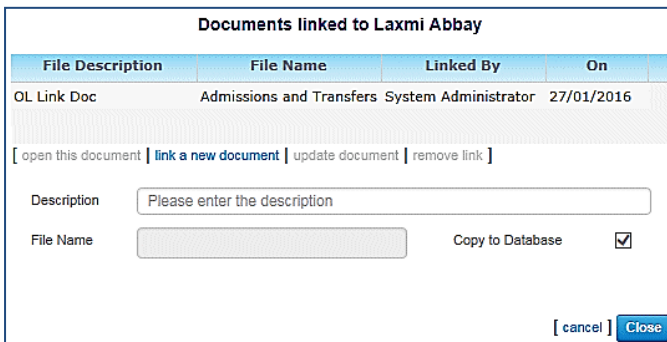
Adding a Linked Document

To add a linked document to Transport Back Office:

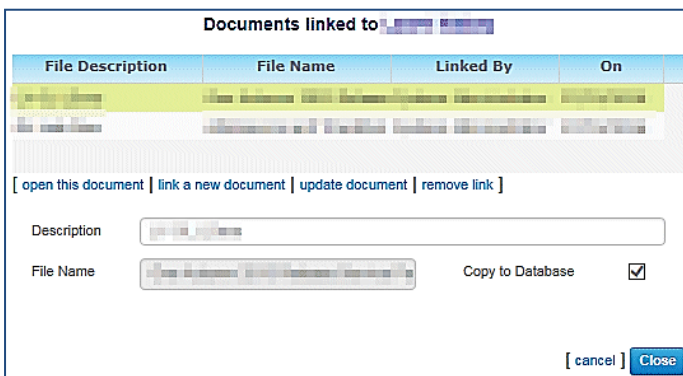
1. In v4 Online, select the entity to which you want to link the document, e.g. **Transport Back Office | People | Personal Info** to display the **Personal** tab.



2. Click the **actions** link and select the **Linked documents** menu option to display the **Documents linked to** dialog. Existing files are displayed in the list.



3. Click the **link a new document** button to display the **Choose File to Upload** dialog.
4. Locate the file and click the **Open** button. The **File Name** field is populated.
5. Enter a **Description**.
6. If required, select the **Copy to Database** button.
7. Click the **Save** button. The file is added to the list of linked documents.

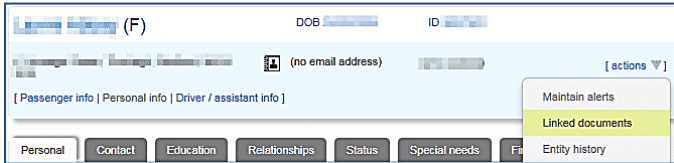


8. Click the **Close** button.

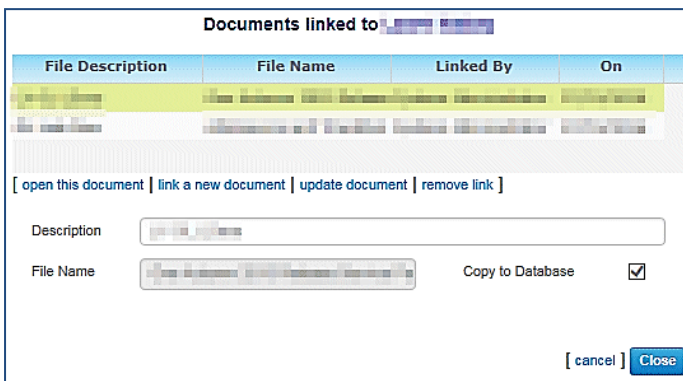
Opening a Linked Document

If a linked document needs editing, it must first be opened and then updated. To open a linked document in Transport Back Office:

1. In v4 Online, select the entity, where the document was linked, e.g. **Transport Back Office | People | Personal Info | Personal** tab.



2. Click the **actions** link and select the **Linked documents** menu option to display the **Documents linked to** dialog. Existing files are displayed in the list.

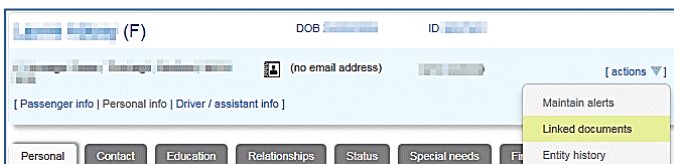


3. Select a document and click the **open this document** button to display the linked document.
4. Click the **Close** button.

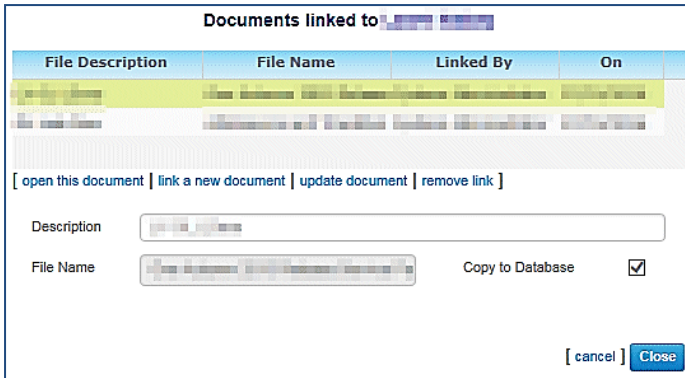
Updating a Linked Document

If a linked document has been edited, it needs to be updated on the **Linked documents** dialog. To update a linked document in Transport Back Office:

1. In v4 Online select **Transport Back Office | People | Personal Info** to display the **Personal** tab.



2. Click the **actions** link and select the **Linked documents** menu option to display the **Documents linked to** dialog. Existing files are displayed in the list.

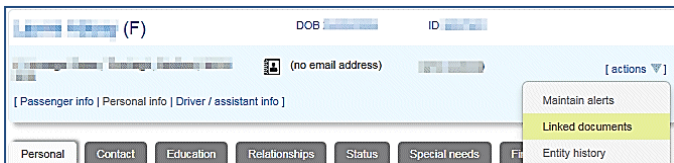


3. Select a document and click the **Update document** button to display the **Choose File to Upload** dialog.
4. Select the updated file.
5. Click the **Open** button on the **Choose File to Upload** dialog.
6. Click the **Save** button on the **Documents linked to** dialog.
A message asks you to confirm that you wish to replace the original file.
7. Click the **Yes** button.
8. Click the **Close** button.

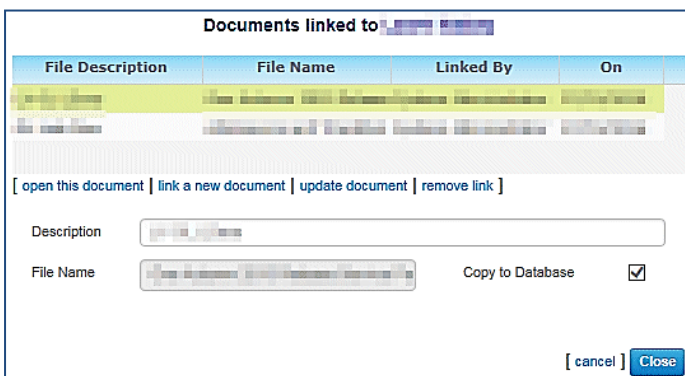
Deleting a Linked Document

A linked document can be deleted from the One database by removing the link. To delete a linked document in Transport Back Office:

1. In v4 Online select **Transport Back Office | People | Personal Info** to display the **Personal** tab.



2. Click the **actions** link and select the **Linked documents** menu option to display the **Documents linked to** dialog. Existing files are displayed in the list.



3. Select a document and click the **remove link** button.
A message asks you to confirm that you wish to delete the linked document.
4. Click the **Yes, delete** button.
5. Click the **Close** button.

Reports

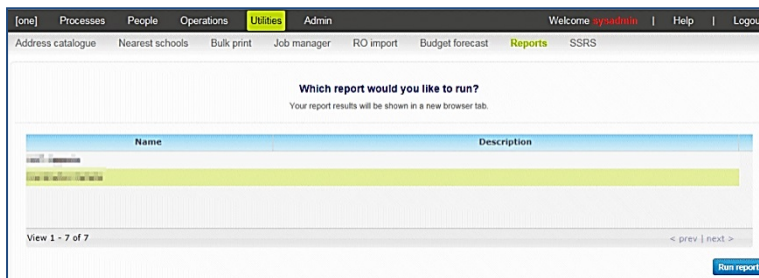
The **Reports** functionality is available in v4 Online in Transport Back office.

One Transport reports are created in SAP Crystal reports and SSRS. For a high level overview of report authoring in One, see the *Report Authoring in CCS Enterprise Architecture* technical guide, available from the One Publications website (www.one publictions.com) and My Account.

Running Reports

To run reports in v4 Online Transport:




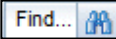

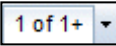
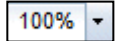
1. In v4 Online, select **Transport | Utilities | Reports** to display the list of available reports.



2. Select a report and click the **Run Report** button to display the SAP Crystal report in a new browser window.



The toolbar at the top of the report enables you to navigate through the report.

	<ol style="list-style-type: none"> 1. Click the Print Report button to display the Print dialog. 2. Select the required printing options. 3. Click the Print button.
	The Drill Up button is not used in Capita One Crystal reports.
	<ol style="list-style-type: none"> 1. Click the Export this Report button to display the Export dialog. 2. Select a file format. 3. Select the page range to be printed. 4. Click the Export button to display the Save As dialog. 5. Enter a File name. 6. Select <i>RPT File (*.rpt)</i> as the Save as Type. 7. Click the Save button.
	<p>To search for text in the report:</p> <ol style="list-style-type: none"> 1. Enter the text in the Search for text field. 2. Click the Search for text button. The results are highlighted.
	Click the Go to Previous Page and Go to Next Page buttons to navigate through the report, page by page.
	<p>To navigate to a particular page:</p> <ol style="list-style-type: none"> 1. Enter a page number in the Page Navigation field. 2. Click the Enter button on your desktop. 3. Click the drop-down to access the Go to First Page and Go to Last Page navigation options.
	Select the drop-down on the Zoom field and select a zoom factor between 25% and 400 %.

Additional Resources:

Transport Back Office Handbook

Report Authoring in CCS Enterprise Architecture technical guide

available on [My Account](#) and the **One Publications** website (www.one publictions.com).

Memo

The **Memo** functionality is available at various locations throughout the v4 Online Transport Back Office module. A memo enables you to add a note to an entity for later reference.

There are two memo buttons available in v4 Online Transport Back Office.

The generic **Memo** records information that is visible to all users in other modules. The **Transport Memo** is only visible to users of the Transport module.

Additional Resources:

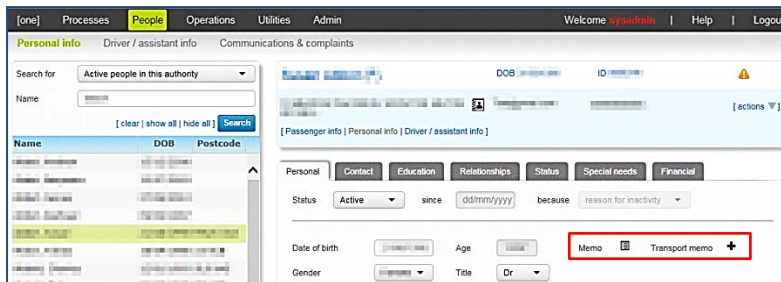
Transport Back Office Handbook
RG_Online_Common_UDFs_Memo

available on [My Account](#) and the **One Publications** website (www.onepublications.com).

Adding a Memo

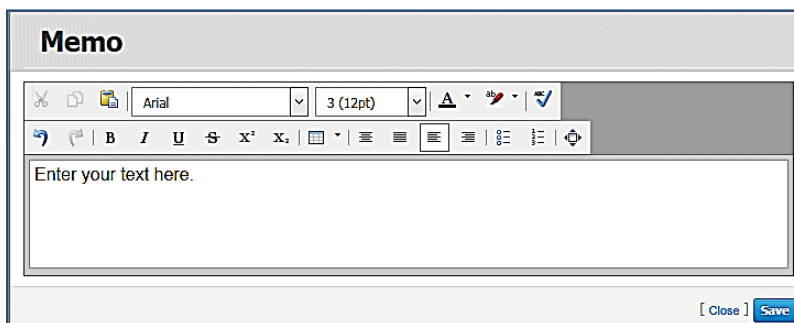
To add a memo:

1. In v4 Online Transport Back Office, select an entity you wish to record a memo for, e.g. **People | Personal Info** to display the **Personal** tab.



A **Memo** icon denotes an existing memo.

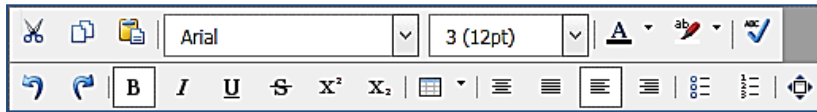
2. Click the **Add** button (plus sign) next to the **Memo** or **Transport Memo** to display the **Memo** dialog.



3. Enter the relevant text and format as required. For more information, see [Formatting a Memo](#) on page 14.
4. Click the **Save** button. The plus sign changes to a **Memo** icon.

Formatting a Memo

The **Memo** dialog uses standard word processor controls to allow for rich text formatting. Hovering over an icon displays the tooltips.



	Cut, Copy, Paste
	Font Name, Font Size
	Font Colour, Highlight Colour, Check Spelling
	Undo, Redo
	Bold, Italic, Underline, Strikethrough, Superscript, Subscript
	Insert Table
	Align Center, Justify, Align Left, Align Right
	Bullet List, Number List
	Full Screen

SQL Mail Merge

The **SQL Mail Merge** button displays in many areas of v4 Online. The primary function of this facility is to create a file of exported data on the basis of an SQL `select` query, typically for use in a mail merge Word document. The data may also be used for analysis in Excel, for example. Only SQL statements that begin with the word `select` are allowed. All other commands such as `update`, `insert` or `delete` are prohibited and will fail validation.

Once the file is created you can export the data to a nominated file folder on the system's network or to a local machine. The system administrator nominates which users and user groups may initiate the query.

SQL mail merge is set up via **v4 Online | Administration | SQL Mail Merge**. Clicking the **SQL Mail Merge** button only allows you to preview and export existing queries.

To preview and export an existing query:

1. Click the **SQL Mail Merge** button to display the **SQL Mail Merge Search Filters** dialog. Existing alerts for the entity display in the **List of SQL Mail Merges** browse.
2. Enter the SQL Query Name in the **Looking For** field to search for the SQL mail merge.
3. Click the **Preview** button to display the **SQL Mail Merge Query Results** dialog.
4. Click the **Export** button to display the **Save As** dialog. The file saves as a .CSV file.

Additional Resources:

RG_Online_Administration_Creating SQL Mail Merge
RG_Online_Common_SQL Mail Merge Button
RG_Administration_SQL Mail Merge
Transport Back Office Handbook

available on [My Account](#) and the **One Publications** website (www.onepublications.com).

UDF Management

User Defined Fields (UDFs) in v4 Online are set up in the v4 Client.

UDFs enable you to add extra fields to accommodate data items that One does not store. UDFs can be created against all entities, e.g. Student Details, Activities, Exclusions and Hearing Impairment. A UDF can only be used once. They are created via **Tools | Administration | UDF Management**. For more information, see [Creating a UDF](#) on page 20.

UDFs cannot be deleted; they can only be made inactive by removing them from the entity. For more information, see [Removing a UDF](#) on page 24.

A dynamic view is created for each migrated v3 table. The view name is **VIEW_UDF_{V3_TABLE_NAME}**. For example, the BASES table has a dynamic view as VIEW_UDF_BASES.

For reporting purposes, a new UDF is included in the view by clicking the **Compile View** button at the top of the **Tools | Administration | UDF Management** page. This creates the view and displays the following message at the bottom of the page:

View VIEW_UDF_<BASES> is generated successfully.

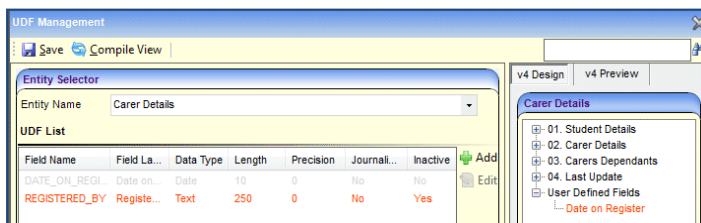
Additional Resources:

RG_Administration_Managing UDFs available on [My Account](#) and the **One Publications** website (www.onepublications.com).

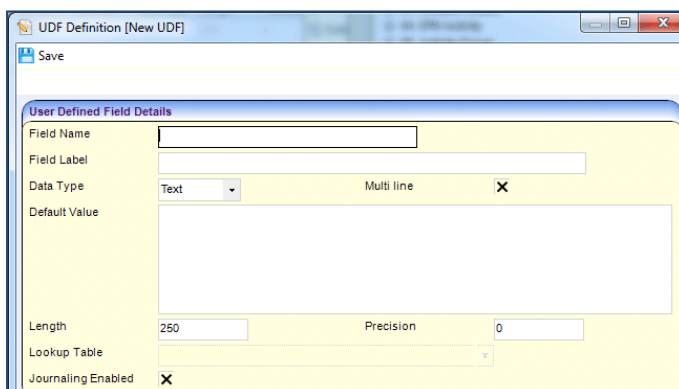
Creating a UDF

To create a new UDF:

1. Select **Tools | Administration | UDF Management** to display the **UDF Management** page.
2. On the **Entity Selector** panel, select the required **Entity Name** from the drop-down list. The **UDF List** displays any UDFs that have already been defined. UDFs that are in use display as grey text. Available UDFs display as red text.



3. Click the **Add** button to display the **UDF Definition** dialog.



4. On the **User Defined Field Details** panel, enter the following UDF details as required:

- i. **Field Name:** This is a unique code name by which the field is known in the database. It contains no spaces, an underscore can be used. It is a free text field up to 30 characters. When the UDF is saved, the file name is added to the UDF table with a prefix of 'U_' to identify the field from those fields that are supplied at the time of installation. The characters are automatically changed to UPPER CASE.
- ii. **Field Label:** This is a description that enables you to identify the UDF. It is a free text field up to 50 characters. The description may include an indication of the type of entry that is expected, e.g. *FSM? (T/F)*, which indicates that the UDF is a logical field and displays as a check box
- iii. **Data Type:** Select from **Text**, **Number**, **Date**, **Logical** or **Lookup**. The remaining fields are dependent upon the data type selected.
- iv. **Multi Line:** This check box is used only for the **Text** data type. Selecting the check box makes the **Default Value** field scrollable, enabling you to enter multiple lines of text.
- v. **Default Value:** The following default values are set:
 - b. **Text** – This is a free text field enabling you to enter letters, numbers and symbols according to the **Length**.
 - c. **Number** – Selecting **Number** only allows numerals to be entered into the **Default Value**. The **Default Value** is dependent on the **Length** field. Selecting **Number** activates the **Precision** field, which enables you to set the number of decimal places.
 - d. **Date** – A default value is required only if you wish to set a particular date as a default date.
 - e. **Logical** – This field displays in the form of a check box. The default values are T (true) or F (false).
 - f. **Lookup** – Lookups do not have a default value.
- vi. **Length:** The following are the maximum number of characters allowed:
 - a. **Text:** If **Multi line** has been selected, then this field is user defined up to a maximum of 250 characters. If **Multi line** has not been selected, then the maximum number of characters is 179.
 - b. **Number:** This is a user defined field up to 18 characters. If the **Length** is set to 10, then the **Default Value** can only be a number up to 10 digits.
 - c. **Date:** This requires 10 characters. It must be in the following format: DD/MM/YYYY.
 - d. **Logical:** The number of characters is automatically set to 1.
 - e. **Lookup:** This is a user defined field up to 6 characters. One Lookup Codes require 4 digits.
- vii. **Precision:** This applies only to the **Number** data type. It is used to record the number of decimal places to be stored in a field.

The decimal point and the decimal places are included in the **Length** field.

- viii. **Lookup Table:** Select a lookup code to which you wish to link the UDF. The field displays as a dropdown from which you can select a user code and description from the relevant lookup.
- ix. **Journaling Enabled:** Select this check box to make the UDF available for audit tracking. This is available for all data types.

2. Click the **Save** button to return to the **UDF Management** page. The new UDF is displayed in red on the UDF List. It remains inactive until added to an entity. For more information, see [Adding a UDF to an Entity](#) on page 22.

UDF List						
Field Name	Field Label	Data Type	Length	Precision	Journaling ...	Inactive
U_TERM1	Term 1	Text	80		No	No
U_NEXT_OFSTED	Next Ofsted	Date	10		No	No
U_U_EMA	EMA Base	Logical	1		No	No
NEW_UDF	Handbook	Text	250	0	Yes	Yes

Additional Resources:

RG_Administration_Managing UDFs available on [My Account](#) and the **One Publications** website (www.onepublications.com).

Adding a UDF to an Entity

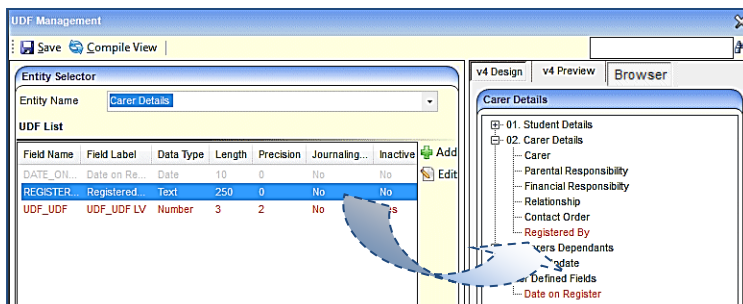
After the UDF has been created, it is added to an entity on the **v4 Design** tab. You can preview the UDF, but you cannot enter any data. For more information, see [Previewing a UDF](#) on page 23

For v4 Online entities, i.e. CIEE and G&B, a separate **Browser** tab is available to add the UDFs. You cannot preview these UDFs.

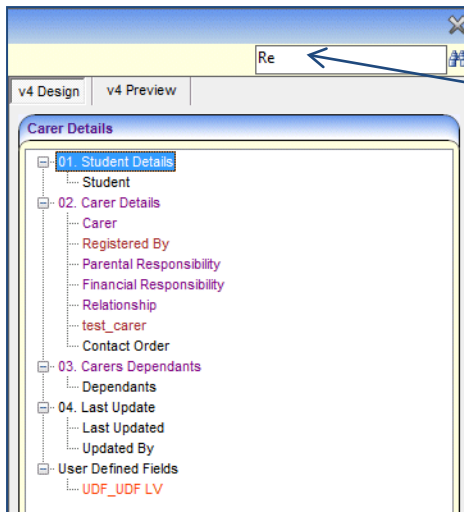
To add a UDF to an entity:

1. Select **Tools | Administration | UDF Management** to display the **UDF Management** page.
2. Select the required **Entity Name**.
3. On the **Entity Selector** panel, drag the UDF from the **UDF List** panel to the **v4 Design** tab.

The **v4 Design** tab lists the details of the selected entity in a tree view. The tree is pre-populated with the panels relating to the selected entity.



UDFs can be placed in any panel or in the **User Defined Fields** panel at the bottom of the tree.



The **Search** box enables you to search the navigation tree for a particular field, by entering a few characters or full words. By default, all matched fields are displayed in purple text. If a matched field is a UDF, it is displayed in brown text.

4. Click the **Save** button.

Additional Resources:

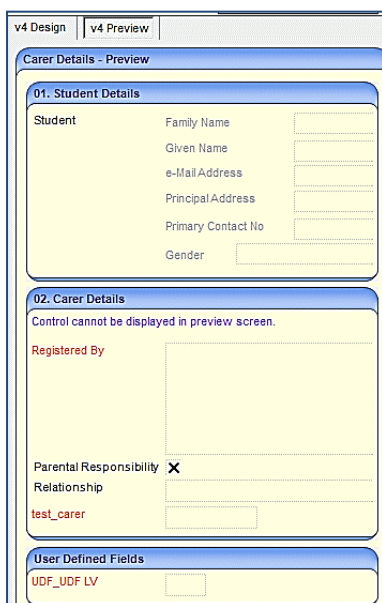
RG_Administration_Managing_UDFs available on [My Account](#) and the **One Publications** website (www.onepublications.com).

Previewing a UDF

The **v4 Preview** tab is available to enable you to view how the UDF will be displayed on the **Entity** page on a record. You cannot enter any data on this tab.

To preview a UDF:

1. Select **Tools | Administration | UDF Management** to display the **UDF Management** page.
2. On the **Entity Selector** panel, select an **Entity Name**.
3. Click the **v4 Preview** tab to display the **<Entity Details> – Preview** panel.



Some fields cannot be displayed in the **v4 Preview** tab. If this occurs, the following message is displayed on the panel:

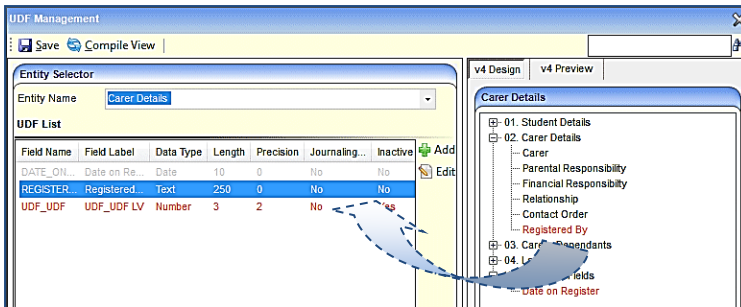
Control cannot be displayed in preview screen.

Removing a UDF

UDFs cannot be deleted; they can only be made inactive by removing them from the entity. If a UDF is removed from an entity, it is removed from all records for that entity; this affects all records regardless of when they were created.

To remove a UDF from an entity:

1. Select **Tools | Administration | UDF Management** to display the **UDF Management** page.
2. On the **Entity Selector** panel, select the required **Entity Name**.
3. Drag the UDF from the **v4 Design** tab to the **UDF List** panel.



The details of the UDF on the **UDF List** panel revert from grey to red text.

4. Click the **Save** button.

Additional Resources:

RG_Online_Common_UDFs_Memo

RG_Administration_UDFs

Transport Back Office Handbook

available on [My Account](#) and the **One Publications** website (www.onepublications.com).

04 / A&T Back Office / Applications / Bases / Music Tuition / Training Manager

Common Functionality

There are a number of common functions in One v4 Online A&T Back Office, Applications, Bases, Music Tuition and Training Manager:

- Alerts
- Linked Documents
- SQL Mail Merge.

Alerts

The **Alerts** button displays in many areas of v4 Online. In v4 Online, alerts are stored against individual records and entities. The **Alerts** functionality enables you to add pop-up messages to a specific context, e.g. a person or a student record that is displayed each time the record is opened.

Alerts are created in v4 Online according to the area where the **Alert** button is available.

Important Note:

If a student is made inactive in v4 Client and the reason is **Deceased**, then when the record is opened for that student in v4 Online, the following system generated alert message displays: **Alert - <Student Name> is deceased.**

Additional Resources:

RG_Online_Common_Alerts Button

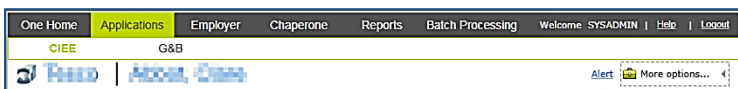
RG_Administration_System Alerts

available on [My Account](#) and the **One Publications** website (www.onepublications.com).

Creating an Alert

To create an alert in A&T Back Office, Applications, Bases, Music Tuition or Training Manager:

1. In **v4 Online | Applications**, select an entity to create the alert, e.g. **CIEE | Student Details**.



2. Click the **Alert** link to display the **Alert Message** dialog. Existing alerts are displayed at the top of the dialog.



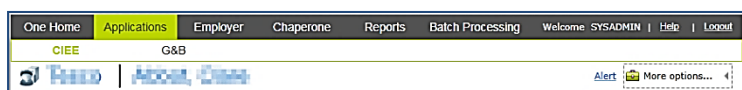
- Click the **Add Alert** link to display the **Alert Messages** panel.

- Enter the text to display in the alert pop-up in the **Alert Message** field.
- If required, select the **Expiry Date** from the calendar drop-down. The expiry date must be in the future.
- Click the **Save** button.
- Click the cross at the top of the **Alert Messages** dialog to return to the main page.

Deleting an Alert

To delete an alert in A&T Back Office, Applications, Bases, Music Tuition or Training Manager:

- In v4 Online | **Applications**, select the entity where the alert was created.



- Click the **Alert** link to display the **Alert Messages** dialog. Existing alerts are displayed at the top of the dialog.

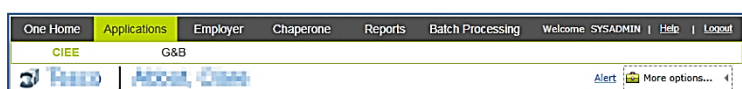


- Click the **Delete** link next to the alert that is to be deleted. The following message is displayed:
Are you sure you wish to delete the selected alert?
- Click the **Yes** button.
- Click the cross at the top of the **Alert Messages** dialog to return to the main page.

Editing an Alert

To edit an alert in A&T Back Office, Applications, Bases, Music Tuition or Training Manager:

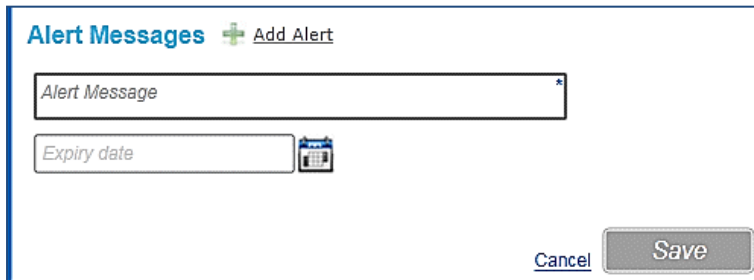
- In v4 Online, select the entity where the alert was created, e.g. **Applications** | **CIEE**.



- Click the **Alert** link to display the **Alert Messages** dialog. Existing alerts are displayed at the top of the dialog.



3. Click the **Edit** link next to the alert that you want to change; the **Alert Messages** panel is displayed.



4. Make the required changes to the alert; you can change the message and the expiry date.
5. Click the **Save** button.
6. Click the cross at the top of the **Alert Messages** dialog to return to the main page.

Linked Documents

The **Linked Documents** functionality is available in the following areas of v4 Online:

- A&T Back Office
- Applications
- Bases
- Music Tuition
- Training Manager.

Linked documents or linked files are related documents, letters or reports etc. A document can be linked to a particular entity. A linked file, for example, could be a report attached to a **Communication Log** item.

As well as linking documents, you are able to choose if you want the linked file to be uploaded to the One database.

The maximum size for an uploaded file is 150 MB. If the selected files size is greater than the permitted upload limit, the file can be linked, but it cannot be uploaded and the following message is displayed:

The file *filename.txt* that you are trying to upload is larger than the maximum permitted size of 150 MB.

Important Note:

When a file is opened, a copy is stored in the **Windows | Downloads** area on the client PC. These files are not automatically removed. We recommend that you regularly clear the list of your downloads.

When a file is saved, a copy is stored on the **Users | Downloads** area on the client PC. These files are not automatically removed. We recommend that you regularly delete copies of files which are automatically retained on the client PC.

Additional Resources:

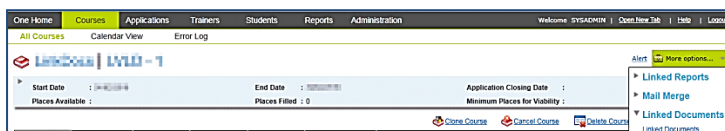
RG_Online_Common_Linked Documents

available on [My Account](#) and the One Publications website (www.one publictions.com).

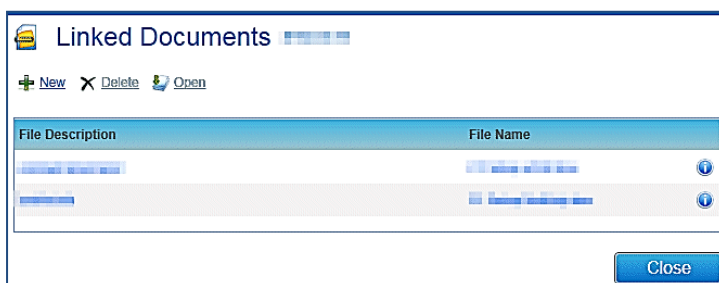
Adding a Linked Document

To add a linked document to A&T Back Office, Applications, Bases, Music Tuition or Training Manager:

1. In v4 Online, select the entity where you wish to add the linked document, e.g. **Training Manager | Courses | All Courses**.



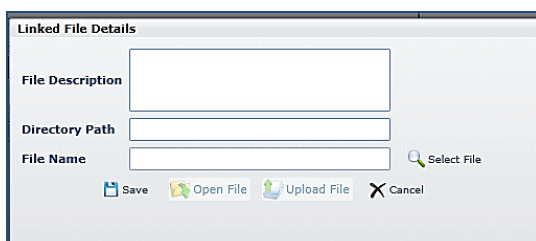
2. Click the **More Options** button and select **Linked Documents** to display the **Linked Documents** dialog. Existing linked documents are displayed in the list.



Note:

Hover the mouse over the **Information** button to display **Linked By**, **Updated By** and **Uploaded By** details.

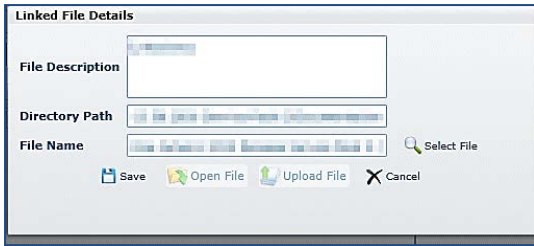
3. Click the **New** button to display the **Linked File Details** dialog.



4. Enter a **File Description**.
5. Click the **Select File** browse, next to the **File Name** field, to display the **Open** dialog.



6. Locate the file you wish to link to the entity.
7. You must copy the location of the file now.
8. Click the **Open** button at the bottom of the dialog.
9. Paste the location of the file into the **Directory Path** field.



10. Click the **Save** button.

The following message is displayed:

Do you want to upload the linked document now?

11. Click the **Yes** button to upload the document now.

A message informs you that the linked file has been saved and uploaded.

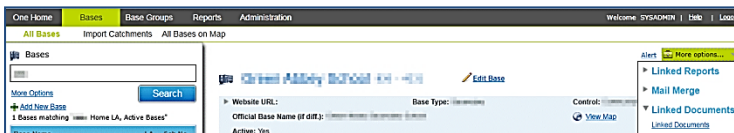
A linked file does not have to be uploaded when it is saved. For more information, see [Uploading a Linked Document](#) on page 8.

12. Click the **Close** button on the **Linked File Details** dialog. The file has been added to the list of linked documents.
13. Click the **Close** button on the **Linked Documents** dialog.

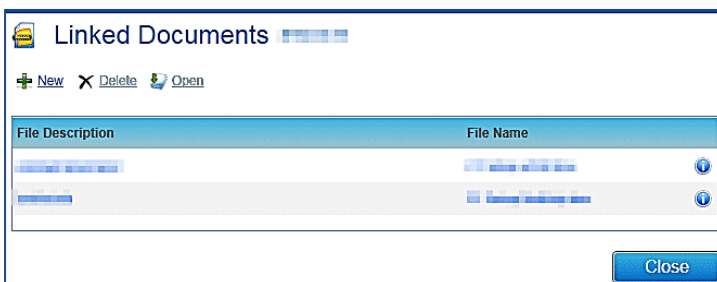
Opening a Linked Document

To open a linked document in A&T Back Office, Applications, Bases, Music Tuition or Training Manager:

1. In v4 Online, select the entity where the linked document has been added, e.g. **Bases | All Bases**.



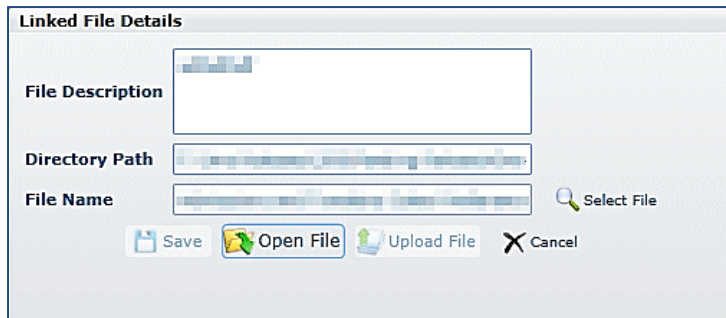
2. Click the **More Options** button and select **Linked Documents** to display the **Linked Documents** dialog. Existing linked documents are displayed in the list.



Note:

Hover the mouse over the **Information** button to display **Linked By**, **Updated By** and **Uploaded By** details.

3. Highlight a document and click the **Open** button to display the **Linked File Details** dialog.

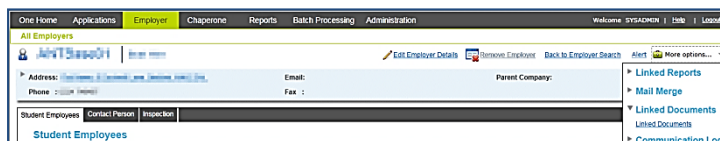


4. Click the **Open File** button; the following warning message is displayed:
 Perform a **Save As** on the file once editing has been completed, in order to identify the file location.
 Use **Select File** to then re-select the edited file in order to complete the re-upload of the edited file.
5. Click the **OK** button.
6. Click the **Open** button to make the changes to the required file.
7. Save the file.
8. Click the **Select File** button to re-select the edited file.
9. Click the **Save** button.
 A message asks you to confirm that you wish to replace the original file.
10. Click the **Yes** button; a confirmation pop-up confirms the file has successfully updated.
11. Click the **OK** button.
12. Click the **Close** button on the **Linked File Details** dialog.

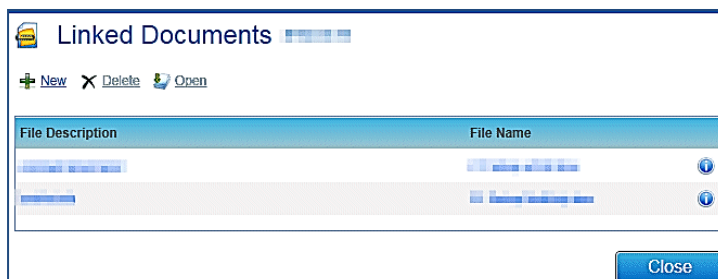
Uploading a Linked Document

To upload a linked document to the One database in A&T Back Office, Applications, Bases, Music Tuition or Training Manager:

1. In v4 Online, select the entity where the linked document has been added, e.g. **Applications | Employer**.



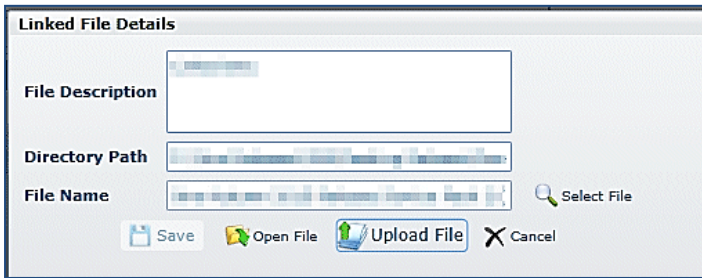
2. Click the **More Options** button and select **Linked Documents** to display the **Linked Documents** dialog. Existing linked documents are displayed in the list.



Note:

Hover the mouse over the **Information** button to display a file that has not been uploaded.

- Highlight a document and click the **Open** button to display the **Linked File Details** dialog.



- Click the **Upload File** button to display the **Open** dialog.
- Locate the file to be uploaded.
- Click the **Open** button. The following confirmation message is displayed:
Linked file uploaded.
- Click the **OK** button on the confirmation pop-up.
- Click the **Close** button on the **Linked File Details** dialog.

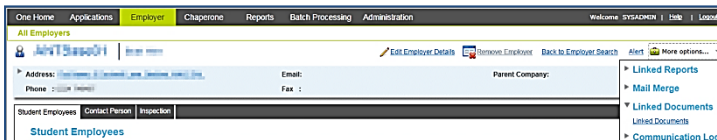
The **Information** button on the **Linked Documents** dialog displays the date, time and name of the person who uploaded the file.

- Click the **Close** button on the **Linked Documents** dialog.

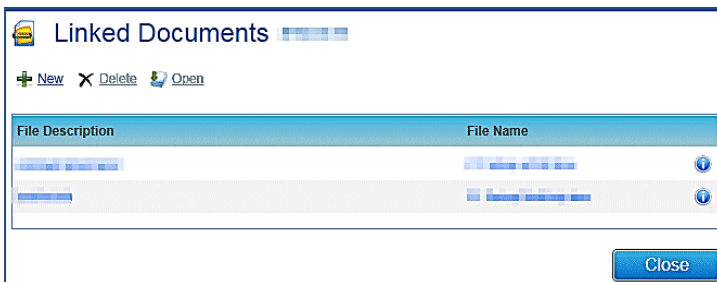
Deleting a Linked Document

To delete a linked document in A&T Back Office, Applications, Bases, Music Tuition or Training Manager:

- In v4 Online, select the entity where the linked document has been added, e.g. **Applications | Employer**.



- Click the **More Options** button and select **Linked Documents** to display the **Linked Documents** dialog. Existing linked documents are displayed in the list.



Note:

Hover the mouse over the **Information** button to display **Linked By**, **Updated By** and **Uploaded By** details.

- Select the file and click the **Delete** button to display the following confirmation message:
Are you sure you want to delete this Linked Document?
- Click the **Yes** button; a message confirms that the linked document has been successfully deleted.

4. Click the **OK** button.
5. Click the **Close** button on the **Linked Documents** dialog.

SQL Mail Merge

The **SQL Mail Merge** button displays in many areas of v4 Online. The primary function of this facility is to create a file of exported data on the basis of an SQL `select` query, typically for use in a mail merge Word document. The data may also be used for analysis in Excel, for example. Only SQL statements that begin with the word `select` are allowed. All other commands such as `update`, `insert` or `delete` are prohibited and will fail validation.

Once the file is created you can export the data to a nominated file folder on the system's network or to a local machine. The system administrator nominates which users and user groups may initiate the query.

SQL mail merge is set up via **v4 Online | Administration | SQL Mail Merge**. Clicking the **SQL Mail Merge** button only allows you to preview and export existing queries.

To preview and export an existing query:

1. Click the **SQL Mail Merge** button to display the **SQL Mail Merge Search Filters** dialog. Existing alerts for the entity display in the **List of SQL Mail Merges** browse.
2. Enter the SQL Query Name in the **Looking For** field to search for the SQL mail merge.
3. Click the **Preview** button to display the **SQL Mail Merge Query Results** dialog.
4. Click the **Export** button to display the **Save As** dialog. The file saves as a .CSV file.

Additional Resources:

RG_Online_Administration_Creating SQL Mail Merge

RG_Online_Common_SQL Mail Merge Button

RG_Administration_SQL Mail Merge

available on [My Account](#) and the One Publications website (www.onepublications.com).

05 / Appendix

Reference Material

The following documents, referenced in this handbook, can be found with every main release:

V4 Linked Reports Handbook

Report Authoring in CCS Enterprise Architecture

Reference Guides (v4 Online)

The following reference guides are available on [My Account](#) and the One Publications website (www.onepublications.com) to help you with the v4 Online System processes:

RG_Administration_System Alerts

RG_Online_Administration_Login_Logout

RG_Online_Administration_Creating SQL Mail Merge

RG_Online_Common_Alerts Button

RG_Online_Common_Buttons_Icons

RG_Online_Common_Filters_Print

RG_Online_Common_Linked Documents

RG_Online_Common_Reports

RG_Online_Common_SQL Mail Merge Button

RG_Online_Common_UDFs_Memo

RG_Online_CSS_People_Person Search

RG_Online_CSS_People_Person_Student Details

RG_Permissions_Report Permissions

RG_Permissions_User Group Permissions

RG_Permissions_User Group Processes

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