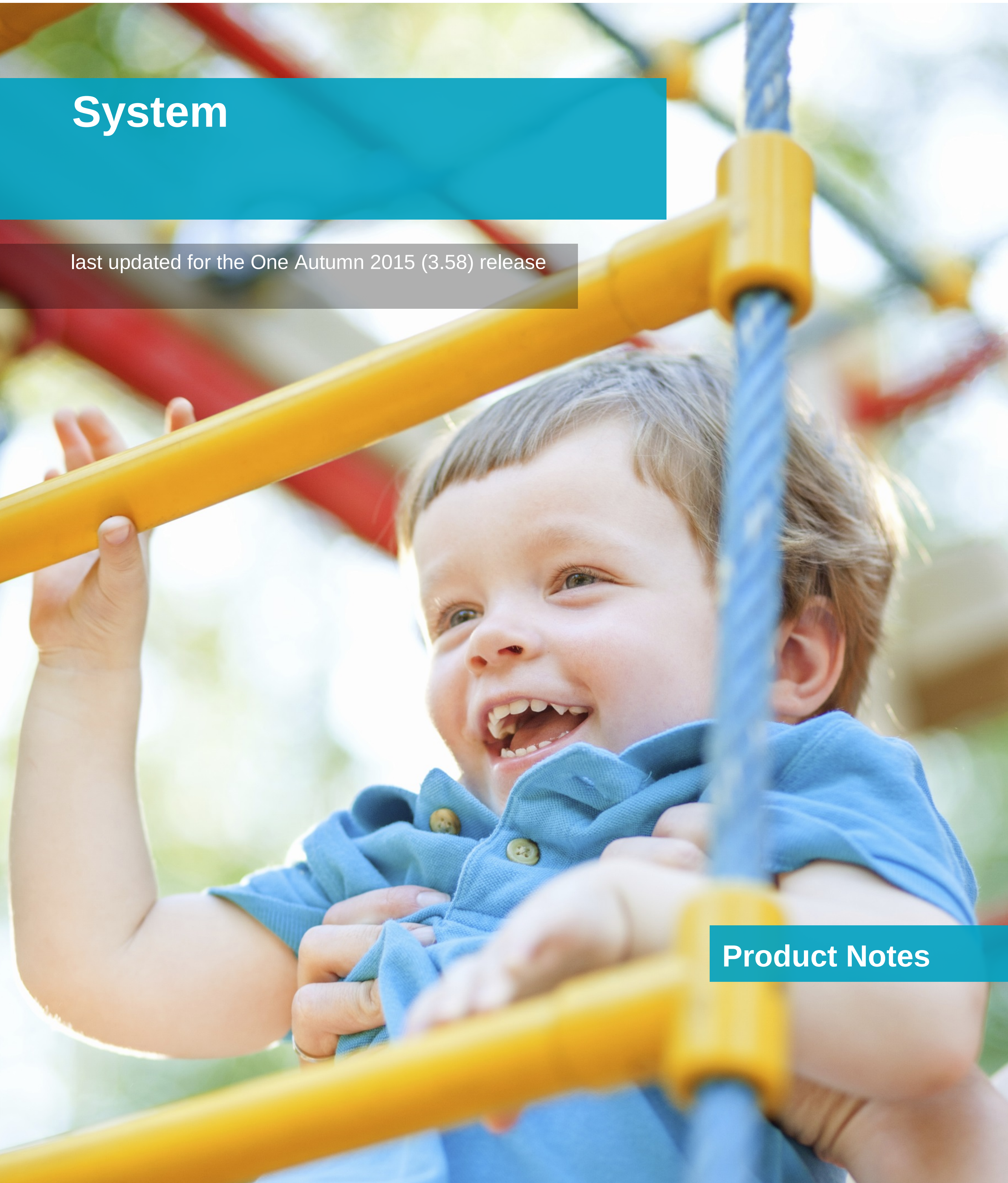
System

last updated for the One Autumn 2015 (3.58) release



Product Notes

These notes list all the strategic changes in SYSTEM, since June 2011, and are intended to brief all users about the system.

Capita Children's Services take the security of the software supplied and access to data extremely seriously. The accompanying release has been through a thorough penetration testing process undertaken by an independent third party security consultancy and no major issues have been reported. If for any reason any security vulnerability is found in our software by a customer via their own penetration testing process against a production environment this should be reported to the One Service Desk in the first instance. This will then be escalated immediately to the appropriate Product Manager as a high priority case for review and, if appropriate, resolution.

You can contact the Service Desk via My Account.

Please ensure that all the relevant sections are distributed to the appropriate section heads.

For those using the One Online Web Server(s): Please allow advance notice of at least three (3) working days for One Technical Services to apply the new One Online software release to the Web-Server(s). Please raise an upgrade request through the One Service Desk stating when you are planning your One upgrade, the version you are upgrading to and whether this is for Test or Live. One Technical Services will schedule this work for you and get in touch leading up to the change to ensure that all is in place to go ahead.

Contents

Reference Guides

A number of reference guides have been produced to assist you with the processes in One v4. These reference guides can be found on the **One Publications** website (http://www.onepublications.com/822427/reference-guides.html) and on **My Account**. A list of current reference guides and resource numbers can be accessed via **My Account | Knowledge Base | Sticky Items**.

As we are working on the latest reference guides it may be necessary to make amendments to existing ones, so it is advisable to check that you have the latest version available. For example:
This guide is based on the version of the software (3.54) in use at the time of publication.

System Reference Guides

V4 Client

RG_Administration_Login_Logout

RG_Administration_Creating Trigger Alerts

RG_Administration_Creating Scheduled Alerts

RG_Administration_Creating SQL Alerts

RG_Administration_Quick Reports

RG_Administration_SQL Mail Merge

RG_Administration_UDFs

RG_Social Network

RG_Relationships_Social Network

V4 Online

RG_Online_Administration_Login_Logout

RG_Online_Administration_SQL Mail Merge

RG_Online_Common_Buttons_Icons

RG_Online_Common_Filters_Print

RG_Online_Common_Linked Documents

RG_Online_UDFs_Memo

RG_Online_Person Search

RG_Online_Person_Student Details

System Autumn 2015 Release (3.58)

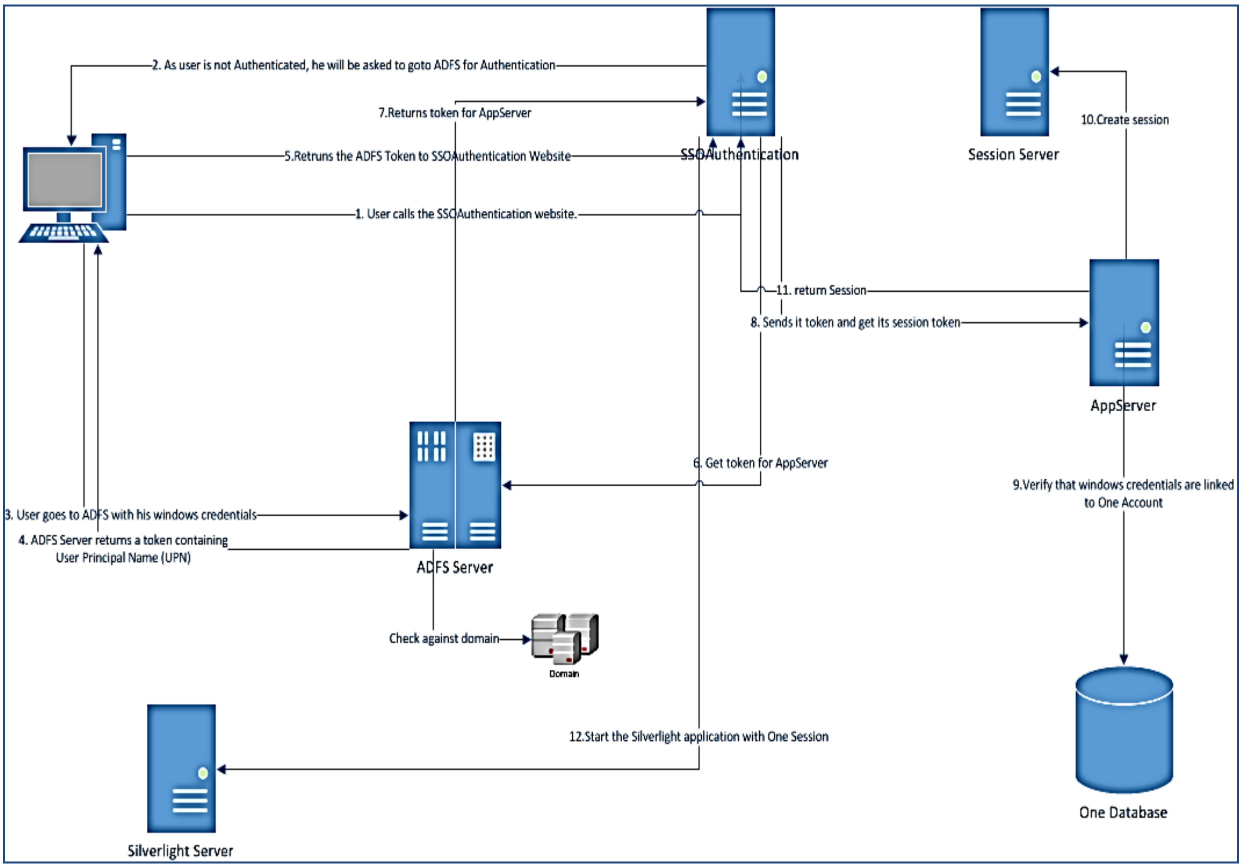
Implementation of Single Sign On (SSO) to Capita One v4 Client & v4 Online

From the One Autumn 2015 Release, Local Authorities (LAs) will have a new service that offers the ability for Capita One to reference the Active Directory Federation Service (ADFS) for domain user information.

The service provides the concept of Single Sign On (SSO). Once the service has been set up and fully configured, users will no longer have to manually log in to the v4 Client or v4 Online. Additional platforms will have the functionality implemented in the future.

Below are the key details to how the system functions and the rules that govern whether the user is automatically logged in or whether they received a Capita One Login prompt.

The following graphic is an infrastructure diagram to visualise the implementation and interactions of the SSO Authentication service.



The following rules govern when a login prompt is displayed to the user where the SSO service is set up.

1. More than one Capita One user account is associated with the Domain ID; this means that One does not know which user to automatically log in.

   Note: The system does notify the Administrator if the Domain ID has been associated with more than one User Account in the 'User Account' management area.

2. The Administrator has asked for the user to be forced to change the password associated with the Capita One 'User Account'.
3. It is the first time the user is logging into One and therefore must change the password from what had been set by the Administrator.
4. The Capita One user account is locked due too many incorrect logins.
5. The Capita One user account is inactive.

Where the Capita One user account is flagged as a 'System Admin' user, One prompts the user whether they wish to access the system as the Admin account or as another user account.

The prompt is to allow administrators to test user accounts that maybe in the process of being setup and to validate permissions to the system.

One will no longer prompt for a password if the users sessions has timed out; this will be validated in the background for the v4 Client. However v4 Online will display a message to state the user is being re-authenticated.

NOTE: With the implementation of the SSO service, this will no longer allow a user to logon as another user, although within v4 Online this rule can be flaunted by logging out which will allow the user to select a link to navigate to the login screen.

V4 User Management Update

In the One Summer 2015 Release (3.57), the **Signature** functionality had not been migrated and therefore this could only be managed within v3. The functionality has now been migrated and Administrators have the ability to associate or delete a signature with a user account if required.

The functionality has been implemented 'As Is' within v3.

Schedule Task Improvement – School History (KB403331)

In the v4 Schedule Task action, School history had limited functionality in comparison to the v3 Reg Base schedule routine.

In this release, the business rules which govern the routine have been reviewed and updated. Additionally the system will log when records could not be updated by the routine. It will state the Base (School) and the students who have school history records that could not be updated and need to be manually corrected.

Where records need to be manually corrected, the History Log for the schedule task will have the following text:

> One or more school history records could not be updated, please review the log for affected records.

At present there is no UI for the log and so to get an output of the records which should not be processed, the user must complete the following procedure to create an alert:

1. Navigate to **Tools | Administration |Alert Definition**.
2. Select a **Scheduled Alert Type**.
3. On the **Scheduled Alert** panel, enter the following SQL **Query** to extract the records which need to be manually updated:

```
SELECT BASENAME,STUDENTID,FORENAME,SURNAME,DOB
FROM (WITH t AS (SELECT JLD.Detail_id,
JL.JOB_DESC,
TO_CHAR(JL.Start_date,'DD-MM-YYYY HH:MM:SS') StartDate,
JLD.CATEGORY1,
B.BASE_NAME basename,
JLD.JOB_DATA str
FROM job_log JL
INNER JOIN job_log_detail JLD ON JL.Job_id = JLD.job_id
INNER JOIN bases B ON JLD.log_group_id = b.base_id
WHERE UPPER(JL.JOB_TYPE) = UPPER('UpdateSchoolHistoryAction'))
SELECT Job_Desc, StartDate, CATEGORY1, Basename, val Studentid
FROM t,xmltable('/root/e/text()'passing xmltype('<root><e>' ||
replace(t.str,',','</e><e>')|| '</e></root>')
columns val varchar2(10) path '/') ) xt,people P
where p.person_id = xt.Studentid
ORDER BY BASENAME, Studentid;
```

4. Select the **Include SQL Results** check box.
5. Select the **Fire If row returned** check box.
6. Enter the date and time for **Alert next Scheduled**.
7. Enter a number to **Repeat every** Minute(s), Hour(s), Day(s), Week(s) or Month(s).
8. On the **Recipient** panel and the **Action** panel, ensure the users are notified via email. Selecting a workflow message does not provide a clear list of student records that need to be reviewed; email is formatted as SQL extract.

NOTE: Where the logged information is older than 4 months, One deletes the logged information.

System Administration, Data Management & Address Tidy Migration

Introduction

This release includes phase two of the System migration, along with a number of key changes with regards to System; notably the remaining areas of v3 Client administration is now available in a v4 platform.

Migration of Password Management

The ability to manage the password configuration has been migrated to the v4 Client. The functionality mimics what is available in the v3 Client; therefore meaning administrators no longer need to access v3 to manage this process.

Passwords configuration is now managed in the v4 Client via **Tools | Administration | User Management | Password Management**.

Migration of System Administration & Data Management Functions

The remaining areas of System Administration, Data Management and Address Tidy have been migrated to an evolved version of the **Archive & Delete** site.

NOTE: The Archive & Delete service \ site has been superseded by the System Admin site. From this release the Archive & Delete functionality is embedded within the Data Management navigation area.

Below is a list of the functions that have been migrated:

System Administration

- Web Address Validation Setup
- LA Details
- LA Defaults
- Address Tidy
  - Auto Address Tidy
  - Manual Address Tidy
- Personnel Control \ Data Shielding
- Ethnic Codes Students
- Online Login Security Parameters
- Permitted Websites

Data Management

- Base Merge - Students
- Case Changes
  - Student
  - People
- People Merge Routine
- Bulk Delete – Guardians

Address Utilities

- Address Tidy
  - Auto Tidy
  - Manual Tidy

For detailed information, see the *One System - System Maintenance in v4* handbook available on the One Publications website (www.onepublications.com).

The following table explains the changes to the functions that have been migrated from v3 to v4.

System Administration			
v3 Function	**v3 Route**	**Migrated Platform v4 System Administration Route**	**Key Changes**
Web Address Validation Setup	Tools | System Administration – WAV Setup	System Admin | Web address validation	The dataset no longer needs to be selected and when the service is deactivated the bases associated with the Remote systems is not deleted.
LA Details	Tools | System Administration | LA Details	System Admin | LA Details	No key changes.
LA Defaults	Tools | System Administration | LA Defaults	System Admin | System Defaults	Larger and clearer UI to see detail and the ability to search for a default.
Personnel Control \ Data Shielding	Tools | System Administration | Personnel Control	System Admin | Personnel Control	No key changes.
Online Login Security Parameters	Tools | System Administration | Online Login Security Parameters	System Admin | Online Login Security Parameters	Removal of redundant options.
Ethnic Codes Students	Tools | System Administration | Ethnic Codes Students	System Admin | Ethnic Codes (Students)	Streamlined process for changing values, addition of an 'Active Only' option, to ensure records are only updated where active in the LA system.
Permitted Websites	Tools | System Administration | Permitted Websites	System Admin | Permitted Websites	No key changes.

Data Management			
v3 Function	**v3 Route**	**Migrated Platform v4 System Administration Route**	**Key Changes**
Base Merge – Student	Tools | Data Management | Base Merge	Data Management | Base Merge | Base Transfer (Students)	Process driven UI to manage routine.
Case Changes – Student & People	Tools | Data Management | Case Change	Data Management | Case Changes	Student & People merge into one routine. Addition of Exceptions option to make the applying of cases to exceptions easier.
People Merge routine	Tools | Data Management | People Merge	Data Management | People Merge	Re-design of searching and displaying information. Please see handbook for full details.
Bulk Deletion - Guardians	Tools | Data Management | Bulk Deletion | Guardians	Data Management | Archive & Delete	The existing routine has been replaced by a report 'Unattached People' which can be processed through the 'Archive & Delete' search area. See notes for information.

Address Utilities			
v3 Function	**v3 Route**	**Migrated Platform v4 System Administration Route**	**Key Changes**
Address Tidy – Auto Tidy	Tools | System Administration | Address Utilities	Address Management | Address Auto Tidy	Ability to run the routine without the need for exclusive use **still should be process in low usage times**. History of routine and records processed, no longer available from within v3 from the 3.58 release.
Address Tidy – Manual Tidy	Tools | System Administration | Address Utilities	Address Management | Address Manual Tidy	All addresses (divided by 100 per paged) displayed on the UI no longer 1 page per address, plus the ability to search for a specific address on a page.

UK Bases

Introduction

The **UK_BASES** table is the **National Database of Schools** table used in extended searches for schools in One, One Online (v3 and v4) and A&T Back Office.

Warning: Changes made to UK_BASES via the routine in Admissions and Transfers Back Office will be maintained. It is possible that updated data in the UK_BASES_EDU table is more accurate than the previously modified data. LAs should consider manually reviewing the data for all edited bases.

Changes to UK Bases

Update Table with Latest Lists

For the One Summer 2015 Release (3.57), the **UK_BASES** table, which is a view of two tables **UK_BASES_EDU** and **UK_BASES_EDITED**, has been refreshed with the latest school data.

The **UK_BASES_EDU** table will be updated with the latest English and Welsh school information as provided by the Department for Education (DfE) and the Welsh Government (WG) EduBase.

The existing data in the **UK_BASES_EDU** table is <u>not</u> deleted, but updated accordingly with the insertion of the new schools.

If the **Retained** check box is selected for any UK Bases, then those bases will <u>not</u> be updated. Also, schools from other locales remain unchanged.

System Summer 2015 Release (3.57)

User Interface Changes

The One v4 Client now enables you to store files within the **Help | My Settings** screen.

The enhanced **My Settings** user interface enables you to specify folder locations for the following six folders:

- My Settings Storage Location
- My Favourites Storage Location
- My Import Files Storage Location
- My Report Templates Storage Location
- My Offline Work Storage Location
- My Offline Cache Storage Location.

Clicking the **Move** button next to each folder displays a dialog that enables you to browse to the location where you want the files to be stored. Clicking the **OK** button moves the relevant folder and all of its files. The **ClientSettings.ini** file is updated at the same time.

Note: The Capita ICS part of the folder path within the ClientSettings.ini file is automatically created and appended by the One v4 application.

If you have already specified a new non-default location, then this is used for all the individual folders.

If you change the location of the **My Settings** folder, a message is displayed asking if you want to change this for the other locations. You have the option to select **Yes** or **No**. Selecting **Yes** changes all of the folder locations. Selecting **No** only changes the **My Settings** folder location.

If you select the checkbox for portable devices, then all of the folder locations default to the location where the v4 Client is installed.

For detailed instructions on how to move the storage locations, refer to the One v4 Client help file.

System Spring 2015 Release (3.56)

NI Number and NASS Number field access (KB407173)

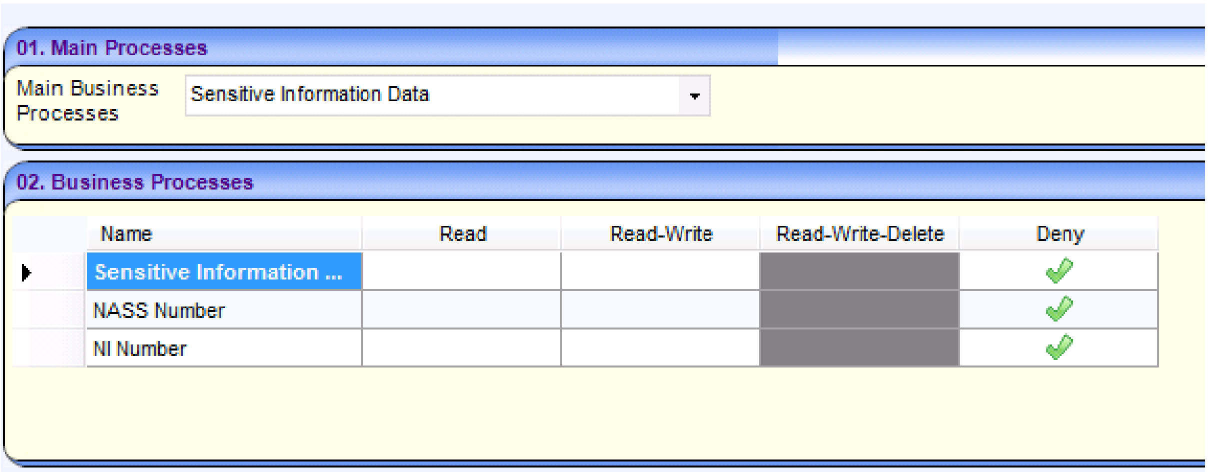
One administrators can now enable restricted access to the **NI Number** and **NASS Number**. Access is controlled via the new **Sensitive Information Data** main business process.

The change only applies to v4 Online and the v4 Client. Transport v4 and the Provider Portal do not currently display the NI or NASS information.

There are three access levels, deny (hidden), read (read-only) or read-write (editable). Access is controlled by new permissions under the new **Sensitive Information Data** main business process, accessible in the v4 Client via **Tools | Permissions | User Group Processes**. In addition, there are two new business processes, one to control permissions for each the **NI Number** and **NASS Number**.

The system behaviour is noted below based on the permitted access:

- Deny – The field and value is hidden in both the V4 Client and V4 Online
- Read – The field and value is visible to the user but set as read-only
- Read-Write – The user has full access, the field is both visible and editable



The permissions make it possible for One Administrators to allow full access to administer person records, but also to restrict the viewing or editing of the NI or NASS information if required.

Data Shielding takes precedence over the permissions granted via the group process. Therefore, if the record being viewed is an 'Employee' and 'Personnel Control' has been set as true, the NI No. will be hidden.

Important Note: The permissions default to deny when the 3.56 upgrade is applied. Administrators must take action to grant the permissions to the users requiring visibility of these data items via the **User Group Processes** screen.

- KB-420118 - BASES - NI Number is not visible for base contacts regardless of permission settings.
- KB-420119 - A&T - The NI Number field is not visible for users with Read-Write permissions.
- KB-420120 - TMMT - Users with Read permissions are able to edit the NI Number field.
- KB-420122 - CIEE - NI Number is not visible for person records in CIEE and G&B regardless of permission settings.

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Warning: Changes made to UK_BASES via the routine in Admissions and Transfers Back Office will be maintained. It is possible that updated data in the UK_BASES_EDU table is more accurate than the previously modified data. LAs should consider manually reviewing the data for all edited bases.

Changes to UK Bases

Update Table with Latest Lists

For the One Spring 2015 Release (3.56), the **UK_BASES** table, which is a view of two tables **UK_BASES_EDU** and **UK_BASES_EDITED**, has been refreshed with the latest school data.

The **UK_BASES_EDU** table will be updated with the latest English and Welsh school information as provided by the Department for Education (DfE) and the Welsh Government (WG) EduBase.

The existing data in the **UK_BASES_EDU** table is not deleted, but updated accordingly with the insertion of the new schools.

If the **Retained** check box is selected for any UK Bases, then those bases will not be updated. Also, schools from other locales remain unchanged.

All Through schools

The DfE has included **All Through** schools in **National Database of Schools,** these schools are added/updated to the **UK_BASES_EDU** table.

Resolved Knowledge Base issues

Resolved Knowledge Base Issues for System are listed in the One Release Notes Spring 2015.

System Autumn 2014 Release (3.55)

UK Bases

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The existing data in the **UK_BASES_EDU** table is not deleted, but updated accordingly with the insertion of the new schools.

If the **Retained** check box is selected for any UK Bases, then those bases will not be updated. Also, schools from other locales remain unchanged.

Student Details

A new field is available via **Focus | People | Students | Student Details | Supporting Details** panel called **G&B FSM**.

This field is visible only if you have a valid G&B licence (v3 or v4). It displays the read-only value returned by the FSM Scheduled Task, which compares the eligibility status recorded in the G&B v4 claims area with the current **FSM Eligibility** value, also recorded on the **Supporting Details** panel. The eligibility status is determined by the business rules defined in the scheduled task. If this field is visible, it should take precedence over the value in the **FSM Eligibility** field.

Child Protection

Introduction

Previously, functionality enabling users to record a child protection event was available in One, but only to Local Authorities (LAs) who had an Integrated Children's Services (ICS) licence. In response to customer feedback, this functionality is now available to all users who have the appropriate permissions.

Protection from abuse and neglect is a fundamental right of all children. Children suffering or at risk of abuse or neglect need to be identified early and provided with appropriate support to help prevent problems from escalating and give them the best chance to thrive in life.

Professionals working with children need to be able to:

- identify signs of abuse and neglect early.
- assess the needs of the children and their families effectively.
- share information effectively and appropriately within and between organisations.
- develop interventions that are effective in improving the lives of the children they are intended to help.

There are three types of child protection records within One:

- Child Protection Plan (CPP)
- Child Protection Register (CPR)
- Child Protection Record (CP).

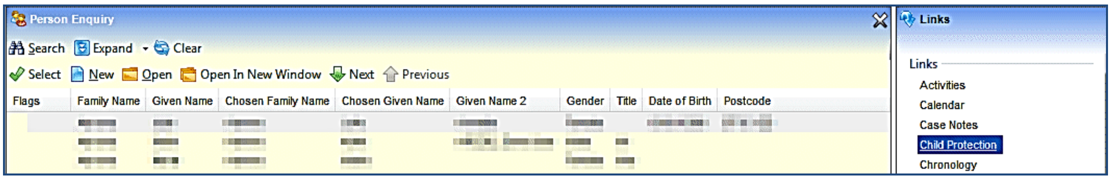
One allows all three forms of child protection records to be displayed at the same time.

One identifies the record type and inserts the identifier into the record as follows:

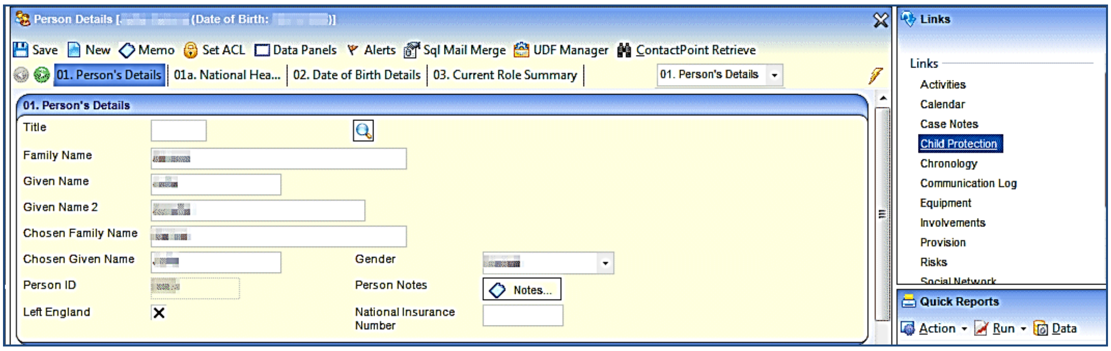
- **CPP** – The CPP record is automatically created using child protection forms. This record is generated for children who are the responsibility of the LA running One. The record is displayed on the **Child Protection** screen when relevant child protection forms are completed for the subject and in the correct order. These forms are only available if the LA has an ICS licence, and the CPP can be updated via the child protection forms.
- **CPR** – The CPR record is created manually using the **Child Protection** panel This record is generated for a child who is protected and is not the responsibility of the LA entering the record into One. One checks if the Council with Social Services Responsibility (CSSR) selected in the record is different from the CSSR recorded as running One. If this is the case, then the default **Record Type** is **CPR**. CPR records can be produced by any user with the appropriate permissions.
- **CP** – The CP record is created manually using the **Child Protection** panel.This is a new type of child protection record. It is created for children who are the responsibility of the LA using One. The system checks if the CSSR selected in the record is the same as the CSSR recorded as running One. If this is the case, then the default **Record Type** is **CP**. CP records can be produced by any user with the appropriate permissions.

Access to Child Protection Link

The **Child Protection** page is accessed via the **Child Protection** link located in the **Links** panel on the **Person Enquiry** or **Student Enquiry** page:

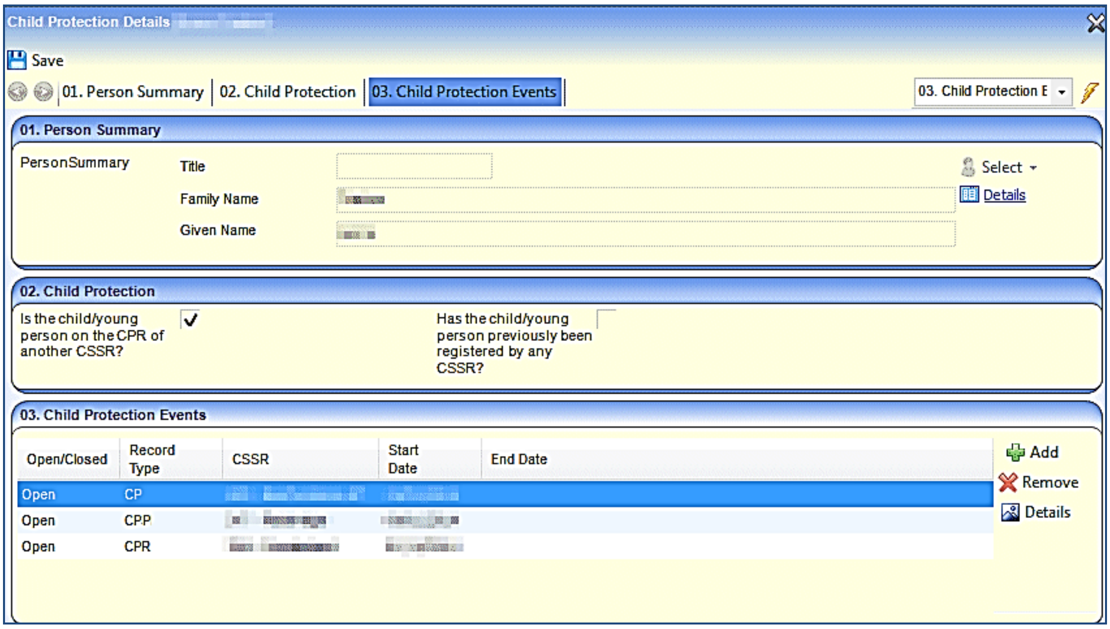


or the **Person Details** or **Student Details** page.



Child Protection Details Screen

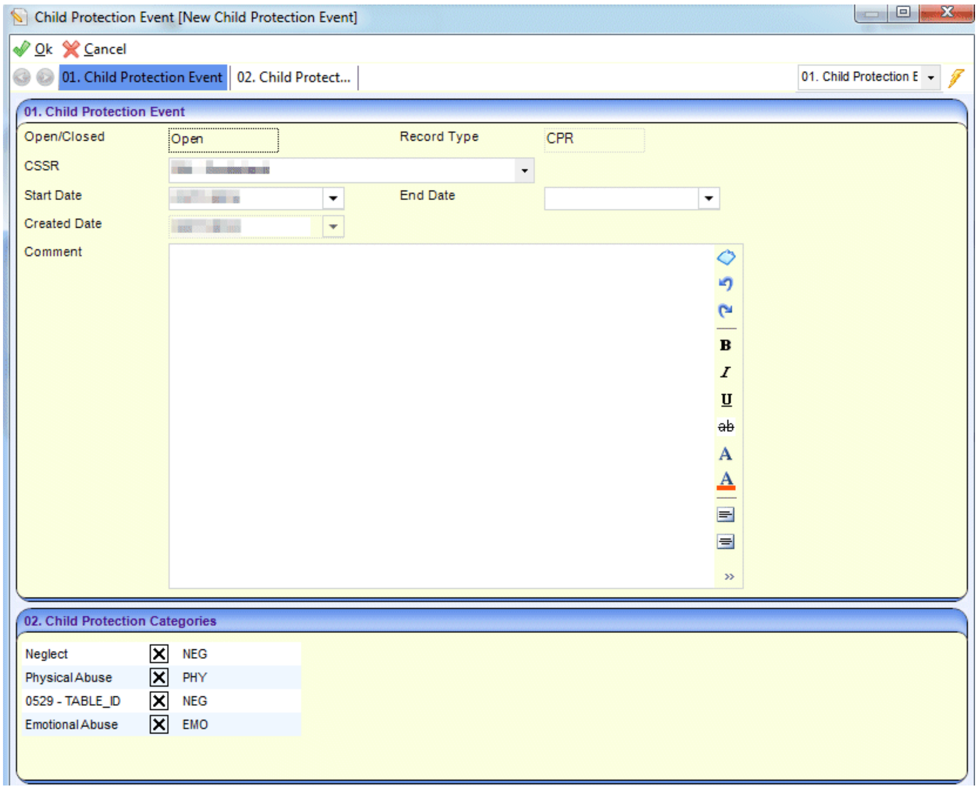
On selecting the **Child Protection** link, One displays the **Child Protection Details** screen:



Three panels are displayed:

- **01. Person Summary** - **Title**, **Family Name** and **Given Name** with a **Details** link to access the **Person Details** dialog.
- **02. Child Protection** – displays the following two questions:
    - o Is the child/young person on the CPR of another CSSR?
    - o Has the child/young person previously been registered by any CSSR?
- **03. Child Protection Events** - displays details of existing events: **Status** (**Open** or **Closed**), **Record Type**, **CSSR**, **Start** and **End Dates** with a **Details** button to access the **Child Protection Event** dialog.

On the **Child Protection Events** panel, select an event then click on the **Details** button to display the **Child Protection Event** dialog.



The **Child Protection Categories** are populated via **Tools | Administration | Lookups | Table_ID 0529 Child Protection Status**.

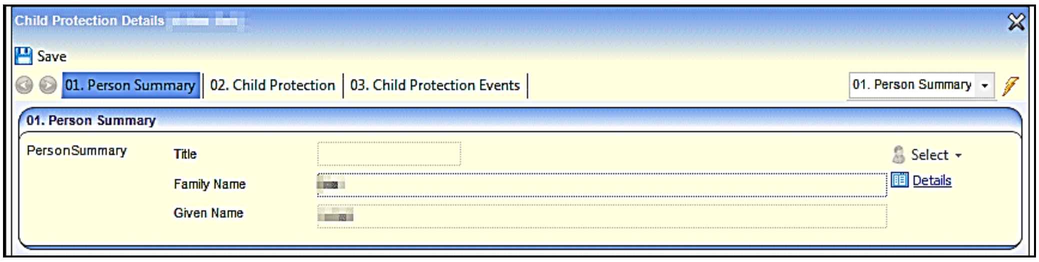
Click **OK** to return to the **Child Protection Details** page. If any changes were made to the **Child Protection Event**, the user must click **Save** on the **Child Protection Details** page in order for the changes to be saved.

Creating a Child Protection Record

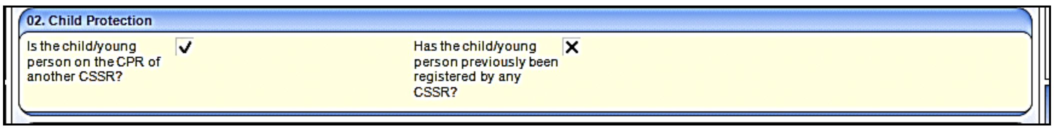
To create a new child protection record:

1. Select **Focus | People | Students | Student Details | Links | Child Protection** to display the **Child Protection Details** page.

   On the **Person Summary** panel, the **Family Name** and **Given Name** are pre-populated. Click the **Details** link to view full details of the child.

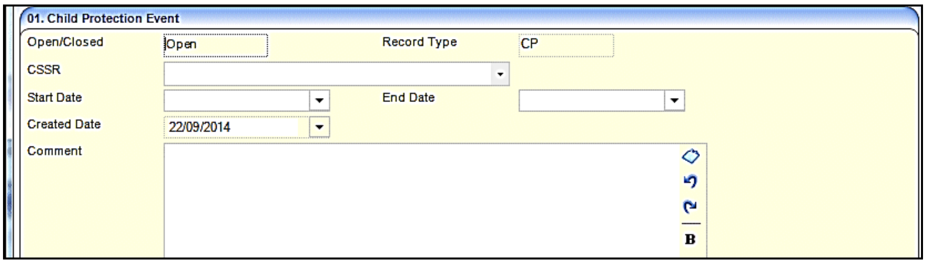
   

2. If required, select the **CSSR** check boxes on the **Child Protection** panel.

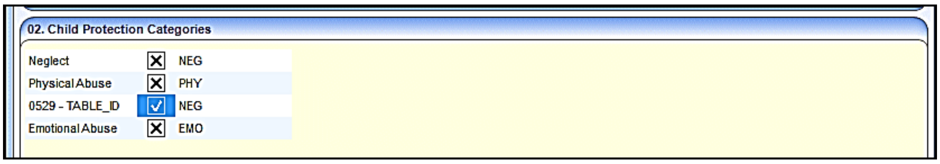
NOTE: These are tri-state check boxes; the default is blank (unknown). Select the check box once to change the status to true (tick), select again to change the status to false (cross).

3. On the **Child Protection Events** panel, click the **Add** button to display the **Child Protection Event [New Child Protection Event]** dialog.

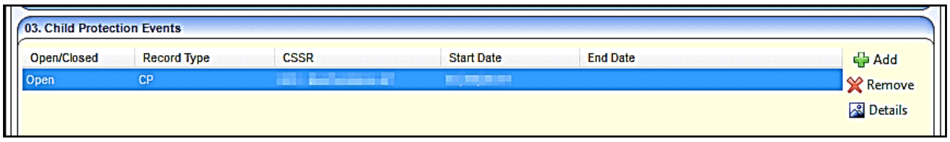


NOTE: **Open/Closed**, **Record Type** and **Created Date** are pre-populated and cannot be edited.

4. Select a **CSSR** (Council with Social Services Responsibility).
5. Enter a **Start Date**.
6. If required, enter an **End Date**. The end date cannot be on or before the start date.
7. If required, enter a **Comment**. This is a free text field for information relevant to this child protection event.
8. On the **Child Protection Categories** panel (*Table_ID 0529*), select one or more categories.

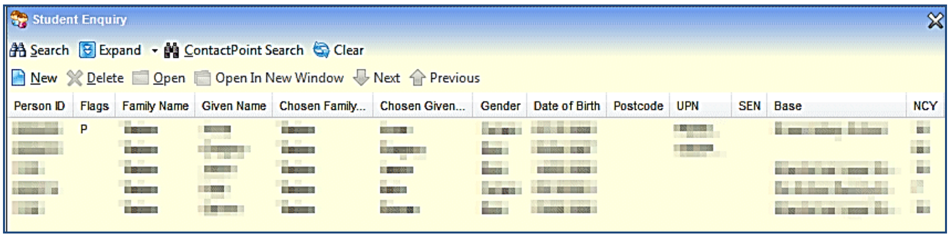


9. Click the **OK** button to return to the **Child Protection Details** page; the **Child Protection Events** panel is populated.

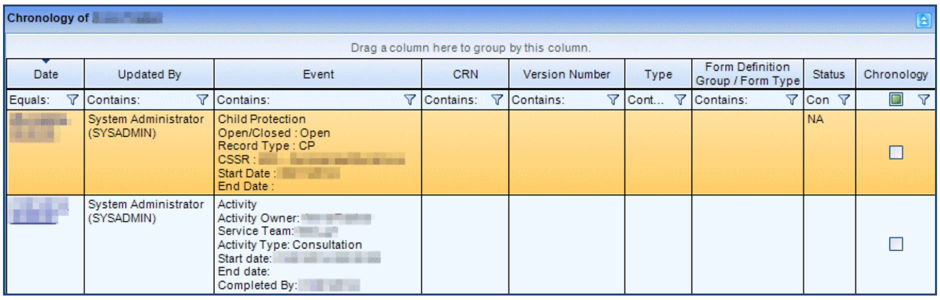


10. Click the **Save** button to save the child protection record.

A **P** flag, indicating a current protection record, displays on the **Student** or **Person Enquiry** page.



The record also displays on the student's chronology.



Permissions

To make the **Child Protection** link available on the **Person/Student Enquiry** page or the **Person/Student Details** page, the following permission should be set via **Tools | Permissions | User Group Permissions | User Group Permissions Editor**:

All Secured Services | Child Protection

To access the **Child Protection** link and the details within the link, the following permissions need to be set via **Tools | Permissions | User Group Permissions | User Group Permissions Editor**:

All Secured Services | Child Protection | Delete a Child Protection Event

All Secured Services | Child Protection | Get Child Protection Details

All Secured Services | Child Protection | Get the details of a Child Protection contact event

All Secured Services | Child Protection | Get the full details of a Child Protection contact event

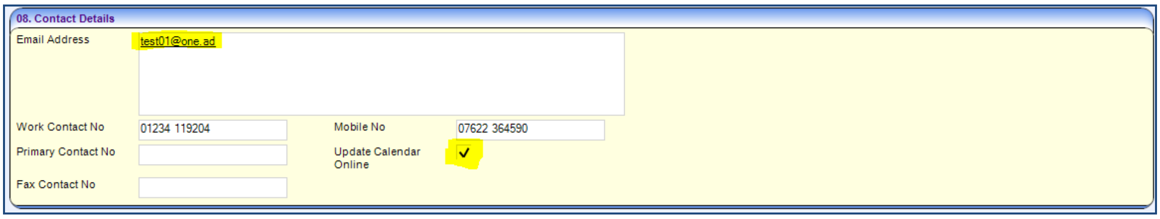
All Secured Services | Child Protection | Save the details of a Child Protection contact event

System Summer 2014 Release (3.54.100)

Outlook Calendar Synchronisation

The One calendar in **Activity | Calendar** can be synchronised with Microsoft Outlook. The Activity Owner must have a valid internal email address entered via **Focus | People | Person | Contact Details |Email Address** and the **Update Calendar Online** check box must be selected.

Calendar entries for other people can also be made in One, providing they have the above criteria set.



The One application supports the following calendar functions for Exchange 2007 and Exchange 2010:

- Addition of new calendar entry.
- Update of existing calendar entry.
- Deletion of existing calendar entry.
- Calendar checks for overlapping entries.
- User permissions to ensure the user has sufficient access rights to make changes to another user's calendar in Outlook.

Synchronisation is one way: One application → Outlook Exchange.

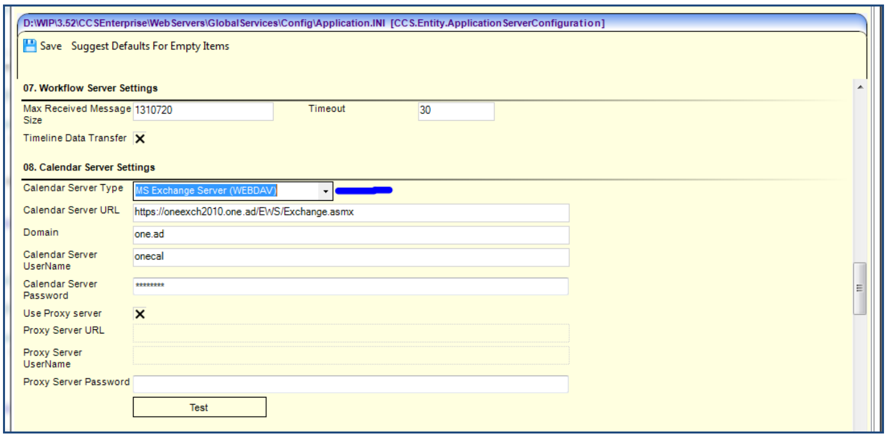
If the calendar has not been synchronised, when an entry is made the following message displays:

Synchronisation to Outlook failed.
Configuration for Outlook not found.
Please note that the Activity Details have been saved successfully.

Initial Configuration / Setup

To configure the calendar settings:

1. Open the **One Configuration Utility**.
2. Select the **Application Servers** tab.
3. Select the **Application Server** from the drop-down list.
4. Navigate to the **Calendar Server Settings** section.



5. Select the **Calendar Server Type** from the drop-down list; there are two options:
   - MS Exchange Server (EWS) - For Exchange 2010
   - MS Exchange Server (WEBDAV) - For Exchange 2007
6. Enter the **Calendar Server URL**.
7. Enter the **Domain**.
8. Enter the **Calendar Server UserName** (This is the Exchange admin account with access to all calendars).
9. Enter the **Calendar Server Password**.

   The following fields are optional, as they are only used with a Proxy Server:

   - **Use Proxy Server**
   - **Proxy Server URL**
   - **Proxy Server UserName**
   - **Proxy Server Password**
10. Click the **Test** button to verify the settings.
    If the test fails, ensure all the details are correct and click the **Test** button again.
11. After the connection is verified, click the **Save** button. These credentials are stored in the **application.ini** file on the Application Server. Both Username and password values are encrypted.

Example Entry in Application.ini File

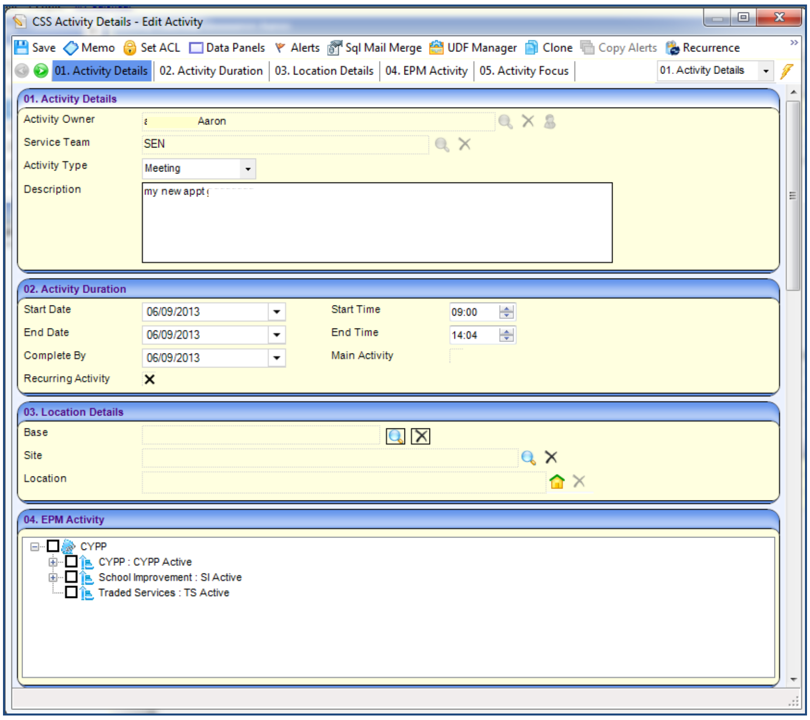
The following is a sample Application.ini file:

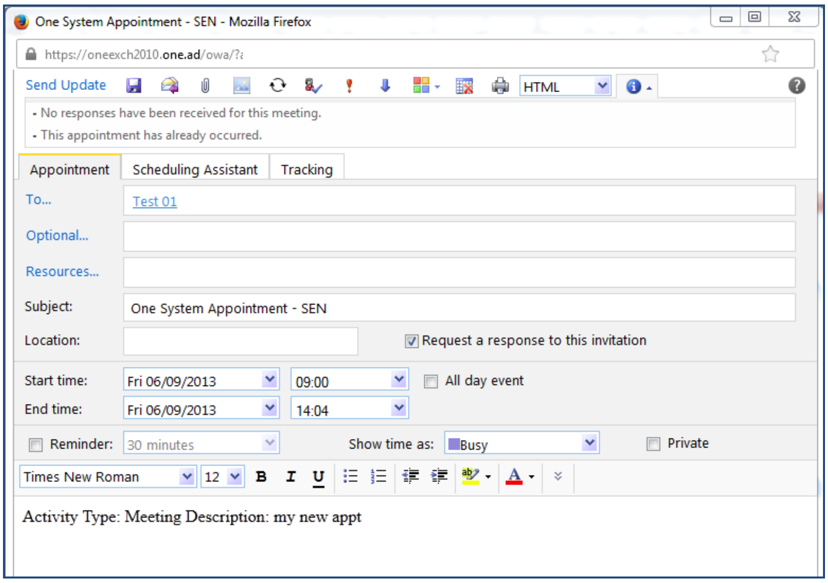
[CalendarServer]
ServerType=MSEXCHANGE
[MSEXCHANGE_EWS]
ServerURL=https://oneexch2010.one.ad/EWS/Exchange.asmx
Domain=one.ad
UserName=/iu5kfmXOuwA2QCNh4K09Q==
Password=hLsvZuJAdf8wqBmN2x1vvjFk1c+/ARMiWErT+/Aah/Q=
ProxyInUse=No
ProxyURL=
ProxyUserName=
ProxyPassword=
[MSEXCHANGE]
ServerURL=https://10.128.53.214/
Domain=lab-la02
UserName=nOJEQVVDsWW8qlZg8r7i2g==
Password=WHnQBf0UmYsqk5ILry9SUNNCCCHyPHfifJushO3Rhb4=
ProxyInUse=No
ProxyURL=
ProxyUserName=

ProxyPassword=

One Application → Outlook Field Mapping

The following screens display the field mappings between the One application and Outlook.





Windows 7

KB402240

ONE v4 client Crashes on Windows 7 When Accessing Involvements and Timelines

Investigation of this issue proved that this was due to the memory resources used by timelines not being released correctly, once the **Timeline** and **Involvement** screens had been closed by the user.

The system has been amended so that any memory used by an involvement or a timeline will be released once both the timeline and the involvement have been closed in the v4 client. This applies whether the cross (**X**) or the **OK** button is used to close the **Timeline** window prior to closing the **Involvement** screen.

There is still a potential for *out of memory* issues to occur if multiple involvements and their timelines are opened by a user in one session, but only the timeline screens are closed. As the memory used by the timeline is only released when the involvement screen is closed, attempting to have too many involvements remaining open where their timeline windows have been opened and then closed, will continue to retain more and more memory.

How quickly this issue becomes apparent to users, depends on both the specification of their machine and other demands being made on the available memory (including by the operating system).

Our advice is for users not to keep **Involvement** screens open, once they have completed their updates to the record.

System Summer 2014 Release (3.54)

Address Management

KB404293

Unable to see the whole UPRN when using the Address Manager in v4 Online

In this release, all 12 characters of the **UPRN** field are now displayed on all the search result screens.

UK Bases

Introduction

The **UK_BASES** table is the **National Database of Schools** table used in extended searches for schools in One, One Online (v3 and v4) and A&T Back Office.

Warning: Changes made to UK_BASES via the routine in Admissions and Transfers Back Office will be maintained. It is possible that updated data in the UK_BASES_EDU table is more accurate than the previously modified data. LAs should consider manually reviewing the data for all edited bases.

Changes to UK Bases

Update Table with Latest Lists

For the One Summer 2014 Release (3.54), the **UK_BASES** table, which is a view of two tables **UK_BASES_EDU** and **UK_BASES_EDITED**, has been refreshed with the latest school data.

The **UK_BASES_EDU** table will be updated with the latest English and Welsh school information as provided by the Department for Education (DfE) and the Welsh Government (WG) EduBase.

The existing data in the UK_BASES_EDU table is <u>not</u> deleted, but updated accordingly with the insertion of the new schools.

If the **Retained** check box is selected for any UK Bases, then those bases will <u>not</u> be updated. Also, schools from other locales remain unchanged.

Resolved Knowledge Base Issues

KB403379

Running a report with a parameter having a list and set to allow custom values does not display the prompt for the custom value and only displays the list when run in v4 Online

Where a list parameter in a Crystal report is set to allow custom values, the user can now enter custom values as well as select values from the list, when the report is run from either the v4 Client and v4 Online.

KB402811

There is no functionality to stop a report once it has been added to the queue

New functionality has been added to both the v4 Client and v4 Online to allow the cancellation of a queued report. The **Cancel** button is available for users that are either System Administrators or have the following permissions:

> **Tools | Permissions | User Group Processes | Main Business Process = Administration | Report Processing**.
>
> **Tools | Permissions | User Group Permissions | System Map | All Secured Services | Report | Cancel Queued Report**.

When a report has been selected, the **Cancel** button is activated only if the report has not been started.

KB400622

'Workflow Server Unavailable - The content type text/html; charset=utf-8 of the response message does not match the content type'

Focus | People | Students | [Links] Involvements | Timeline

One no longer displays the above error while saving the timelines against the child records even if the workflow server is installed separately to the report server.

KB403001

Missing Links if One v4 installed on network drive

The **Involvement**s navigation link from the **Student** screen is now visible when the user is accessing a v4 Client that is installed on a network drive or other remote location, assuming the requisite permissions are in place for the user.

KB403797

'External Code is greater than the maximum permitted size of 3' when adding or editing lookups with an External Code of 4 for Welsh Las

Previously it was not possible to add an external code which was four characters in length to the 0123 lookup in Welsh environments. This has been changed to allow all the standard external codes to be used and saved without error.

KB403697

Navigation buttons are not available in the Carer details view when switching from full page to individual panels

The **Previous** and **Next** button are now available in on **Carer Details** panel. Also, the **Carer Dependants** panel information grid and scroll bar have been correctly sized to fit within the panel boundaries.

KB403430

Missing functionality to delete a timeline in v4

Users can now delete a timeline from a student's involvement. Once the timeline has been deleted it is not recoverable. A new timeline can be added to the involvement but it will start from the beginning, so users will have to skip any irrelevant activities to get to the current point on the timeline.

KB403122

Not all fields in the School History panel are displayed on the relevant entity in UDF Management

It is now possible to add UDFs after all visible fields in the **School History Details** panel. The two non-visible fields **Sch No.** and **Type** are ignored, therefore any UDFs added after these will be displayed after the **LA No.** field.

KB402811

There is no functionality to stop a report once it has been added to the queue

Queued reports can now be cancelled in both the v4 Client and v4 Online. A **Cancel** button is present for users that have the required permissions. When a report has been selected the **Cancel** button will only be active if the report has not been started.

Required Permissions:

v4 | Tools | Permissions | User Group Processes | Main Business Process = Administration | Report Processing

v4 | Tools | Permissions | User Group Permissions | System Map | All Secured Services | Report | Cancel the Queued Report

KB404280

When no entry is made on a date or numeric UDF in CSS Activity, the value saved is -1.79769313486232E+308 or '01/01/0001'

Previously numerical or date UDFs for CSS Activities, would be populated with invalid data if nothing was entered into them before saving. From this release, if no value is entered, a NULL value is stored to the database when record is saved.

System Spring 2014 Release Service Pack 1 (3.53.100)

GIS

KB404614

When carrying out the Nearest School Search and using any option other than 'Nearest Site' repeated results are being returned for some Bases the first few of these results return no distances.

This is due to a fault in the database query which returns the data attributes of the Nearest Schools. This issue has been rectified in the Service Pack as part of the DBManager Installation.

System Spring 2014 Release (3.53)

UK Bases

The **UK_BASES** table is the **National Database of Schools** table used in extended searches for schools in One, One Online (v3 and v4) and A&T Back Office.

Warning: Changes made to **UK_BASES** via the routine in Admissions and Transfers Back Office will be maintained. It is possible that updated data in the UK_BASES_EDU table is more accurate than the previously modified data. LAs should consider manually reviewing the data for all edited bases.

Changes to UK Bases

Update Table with Latest Lists

For the One Spring 2014 Release, the **UK_BASES** table, which is a view of two tables **UK_BASES_EDU** and **UK_BASES_EDITED**, has been refreshed with the latest school data. The **UK_BASES_EDU** table will be updated with the latest English and Welsh school information as provided by the Department for Education (DfE) and the Welsh Government (WG) EduBase.

If the Retained check box is selected then those bases will not be updated. Schools from other locales remain unchanged.

Resolved Knowledge Base Issues

KB403318

ACLs Not Taking into Account End Dates of Post When Applying Access Rules

Access Control Lists (ACLs) can be set up to allow or deny access based on the user’s post. This fix ensures that users can only access records protected by the ACL granted to a post while their post is current; this includes being able to access the records on the post Start and End dates.

This change will also impact exemplar sign offs in ICS (now Children’s Social Care). When a user's posts are checked to confirm if they are able to sign off an exemplar, the relevant post also needs to be current.

Prior to applying this fix, the only way to effectively deny access to this data was to completely remove the user from the Post.

KB403254

Linked Report Not Prompting Users for Parameter Values

This issue has been addressed across several areas of One v4 (online and client) as part of the One Spring 2014 Release (3.53). Key areas where the functionality has been improved are Governors, CSS and A&T Back Office.

If a linked report contains additional non-linked parameters, the user is prompted for these when they run the report. If the reports are not in Timelines, the linked parameters are also displayed at the start of the parameter list with the linked values pre-selected.

Please note, if certain linked parameters are not available when the report is run, these appear blank in the **Parameter** screen (even when no additional parameters are present). Users are free to enter values if they wish, but this will most likely produce unintended results in the report, so it is not advised.

An example of this is the **Governing Body Composition** screen that has four linked parameters in total. If a person has not been entered against a Post, the Person ID linked parameter appears blank. A user is free to select a person, but as they will not be in the appropriate tables for the composition and position, a report for that area may not return details even with the parameter populated.

This is as expected and where the person should be in the governing body position, they should be added to the record and the record saved prior to the report being run.

System Autumn 2013 Release (3.52.103)

System (ACLs)

KB404251

This hotfix enables the ACL to be applied by the system according to the start and end dates of a user's post. It also eliminates the 'Cannot Create Security Token' error for users with post start or end dates in the year 2000; this was discovered in the original hotfix release of 3.52.001.

System Autumn 2013 Release Service Pack 1 (3.52.100)

System (ACLs)

KB403318

When the ACL is loaded (at the time the users logs on), any access which is granted due to the user being in a particular post must be cross checked with the system date.

For the ACL to apply to a user, the system date must be between the start and end dates of their post (this is inclusive, so where the system date is equal to the start or end date the ACL would still apply).

If the system date falls outside of the users' post's dates, the ACL relating to that post will not apply to that user.

Note: Any other ACL which is on that record and affects the user should still be applied, including the favour allow/deny setting (e.g. they could be mentioned as an individual user, as part of a user group or even as a member of another post).

This issue was fixed in the Autumn 2013 Release (3.52.001).

System (UDFs)

KB401888

This hotfix resolves the following error:

> ORA-20100: Unable to save udf value ORA-00936: missing expression.

This error occurs when saving a numeric UDF value that has been migrated from v3 with null values in v4. This affects UDFs of the entities that are being migrated from v3 (e.g. Exclusions, Bases, People, Provider, Student History and Governing Body).

This issue was fixed in the Autumn 2013 Release (3.52.003).

KB403816

This hot-fix resolves the following error:

> Connection is already part of a local or a distributed transaction.

This error occurs when adding a new Legal Action involvement form that includes UDFs. This only affects legal action involvement forms containing UDFs.

This issue was fixed in the Autumn 2013 Release (3.52.003).

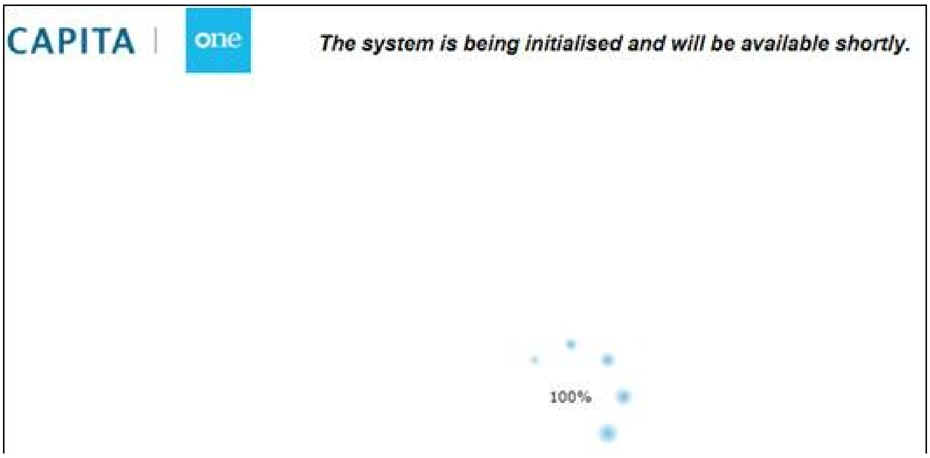
System (Error Logging)

KB403164

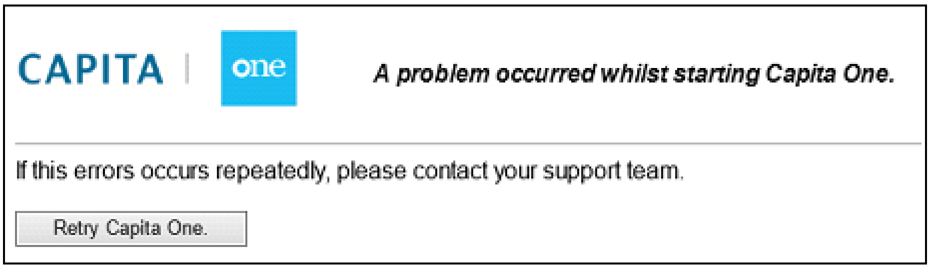
This hot fix supersedes hot fixes One Summer 2013 Release 3.51.201 and One Summer 2013 Release 3.51.203. The improved logging introduced in 3.51.201 could be quite intrusive for some users; this hot fix enables the user to continue more easily while still maintaining a log of issues as they arise.

The following notifications are displayed:

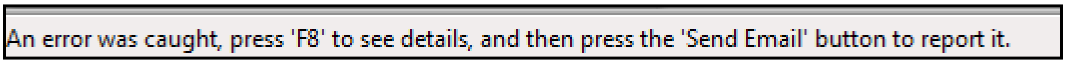
- If the server must start from a sleeping state, there may be a delay while v4 Online loads. The user is now notified that the server is waking.



- If the Capita One web server does not respond within the normal timeout limits, the user will be presented with the following screen. This replaces the occasional blank screen errors that were displayed previously. Users can click the **Retry Capita One** button to attempt another login without needing to close and restart the web browser. Users are advised to contact their support team if the error recurs.



- However if an error occurs that has not been captured by another, more specific, error message, the following message displays in the status bar of Internet Explorer rather than being displayed on the full page.



- Click the **F8** button to display the details of the error in a new tab.

Note: To view this message the status bar on the browser has to be turned on via **View | Toolbar | Status bar** (If the menu cannot be seen click the **F10** button). Clicking the **F8** button displays the details of the error in a new tab or pop up window depending on the browser's setup.

- Select the tab to display the logging information.

- Click the **Email** button to open your local email client and copy the error details in to the body of the message. You can then send the error details to the appropriate technical support personnel.

System Autumn 2013 Release (3.52.003)

User Defined Fields (UDFs)

KB401888

This hotfix resolves the following error:

ORA-20100: Unable to save udf value ORA-00936: missing expression.

This error occurs when saving a numeric UDF value that has been migrated from v3 with null values in v4. This affects UDFs of the entities that are being migrated from v3 (e.g. Exclusions, Bases, People, Provider, Student History and Governing Body).

KB403816

This hot-fix resolves the following error:

Connection is already part of a local or a distributed transaction.

This error occurs when adding a new Legal Action involvement form that includes UDFs. This only affects legal action involvement forms containing UDFs.

System Autumn 2013 Release (3.52.001)

Access Control Lists (ACLs)

KB403318

When the ACL is loaded (at the time the users logs on), any access which is granted due to the user being in a particular post must be cross checked with the system date.

For the ACL to apply to a user, the system date must be between the start and end dates of their post (this is inclusive, so where the system date is equal to the start or end date the ACL would still apply).

If the system date falls outside of the users' post's dates, the ACL relating to that post will not apply to that user.

Note: Any other ACL which is on that record and affects the user should still be applied, including the favour allow/deny setting (e.g. they could be mentioned as an individual user, as part of a user group or even as a member of another post).

This hot fix was replaced by the One Autumn 2013 Release, Service Pack 1 (3.52.100) and the One Autumn 2013 Release (3.52.103).

System Summer 2013 Release (3.51.205)

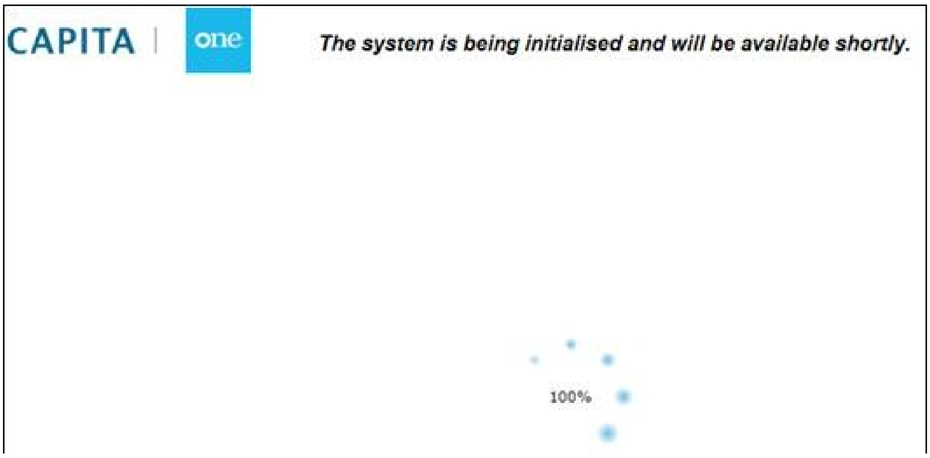
Error Logging

KB403164

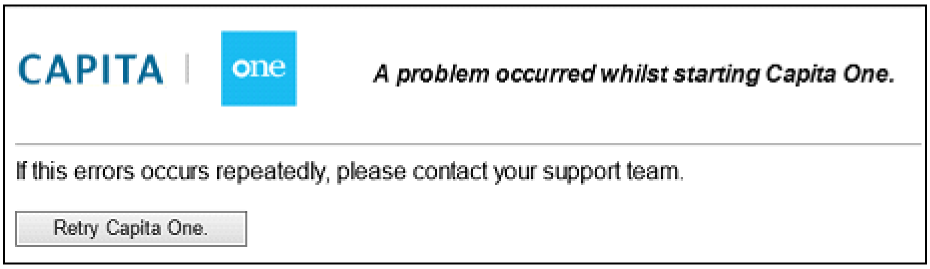
This hot fix supersedes hot fixes One Summer 2013 Release 3.51.201 and One Summer 2013 Release 3.51.203. The improved logging introduced in 3.51.201 could be quite intrusive for some users; this hot fix enables the user to continue more easily while still maintaining a log of issues as they arise.

The following notifications are displayed:

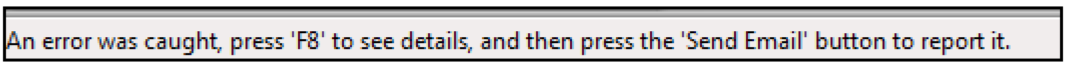
- If the server must start from a sleeping state, there may be a delay while v4 Online loads. The user is now notified that the server is waking.



- If the Capita One web server does not respond within the normal timeout limits, the user will be presented with the following screen. This replaces the occasional blank screen errors that were displayed previously. Users can click the **Retry Capita One** button to attempt another login without needing to close and restart the web browser. Users are advised to contact their support team if the error recurs.



- However if an error occurs that has not been captured by another, more specific, error message, the following message displays in the status bar of Internet Explorer rather than being displayed on the full page.



- Click the **F8** button to display the details of the error in a new tab.

Note: To view this message the status bar on the browser has to be turned on via **View | Toolbar | Status bar** (If the menu cannot be seen click the **F10** button). Clicking the **F8** button displays the details of the error in a new tab or pop up window depending on the browser's setup.

- Select the tab to display the logging information.

- Click the **Email** button to open your local email client and copy the error details in to the body of the message. You can then send the error details to the appropriate technical support personnel.

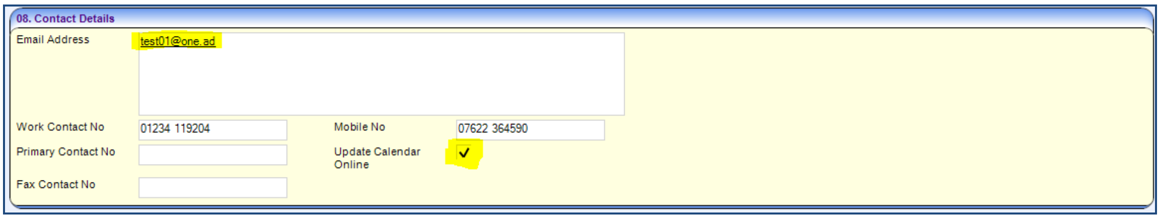
System Autumn 2013 Release (3.52)

Outlook Calendar Synchronisation

Purpose

The One calendar in **Activity | Calendar** can be synchronised with Microsoft Outlook. The Activity Owner must have a valid internal email address entered via **Focus | People | Person | Contact Details |Email Address** and the **Update Calendar Online** check box must be selected.

Calendar entries for other people can also be made in One, providing they have the above criteria set.



The One application supports the following calendar functions for Exchange 2007 and Exchange 2010:

- Addition of new calendar entry.
- Update of existing calendar entry.
- Deletion of existing calendar entry.
- Calendar checks for overlapping entries.
- User permissions to ensure the user has sufficient access rights to make changes to another user's calendar in Outlook.

Synchronisation is one way: One application → Outlook Exchange.

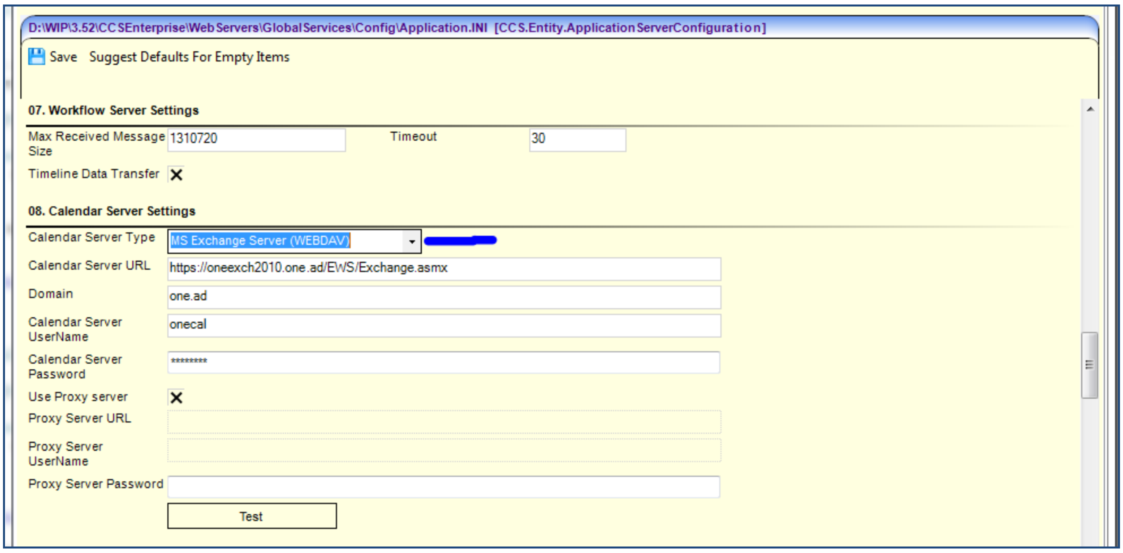
If the calendar has <u>not</u> been synchronised, when an entry is made the following message displays:

> Synchronisation to Outlook failed.
> Configuration for Outlook not found.
> Please note that the Activity Details have been saved successfully.

Initial Configuration / Setup

To configure the calendar settings:

12. Open the **One Configuration Utility**.
13. Select the **Application Servers** tab.
14. Select the **Application Server** from the drop-down list.
15. Navigate to the **Calendar Server Settings** section.



16. Select the **Calendar Server Type** from the drop-down list; there are two options:
    - MS Exchange Server (EWS) - For Exchange 2010
    - MS Exchange Server (WEBDAV) - For Exchange 2007
17. Enter the **Calendar Server URL**.
18. Enter the **Domain**.
19. Enter the **Calendar Server UserName** (This is the Exchange admin account with access to all calendars).
20. Enter the **Calendar Server Password**.

    The following fields are optional, as they are only used with a Proxy Server:

    - **Use Proxy Server**
    - **Proxy Server URL**
    - **Proxy Server UserName**
    - **Proxy Server Password**
21. Click the **Test** button to verify the settings.
    If the test fails, ensure all the details are correct and click the **Test** button again.
22. After the connection is verified, click the **Save** button. These credentials are stored in the **application.ini** file on the Application Server. Both Username and password values are encrypted.

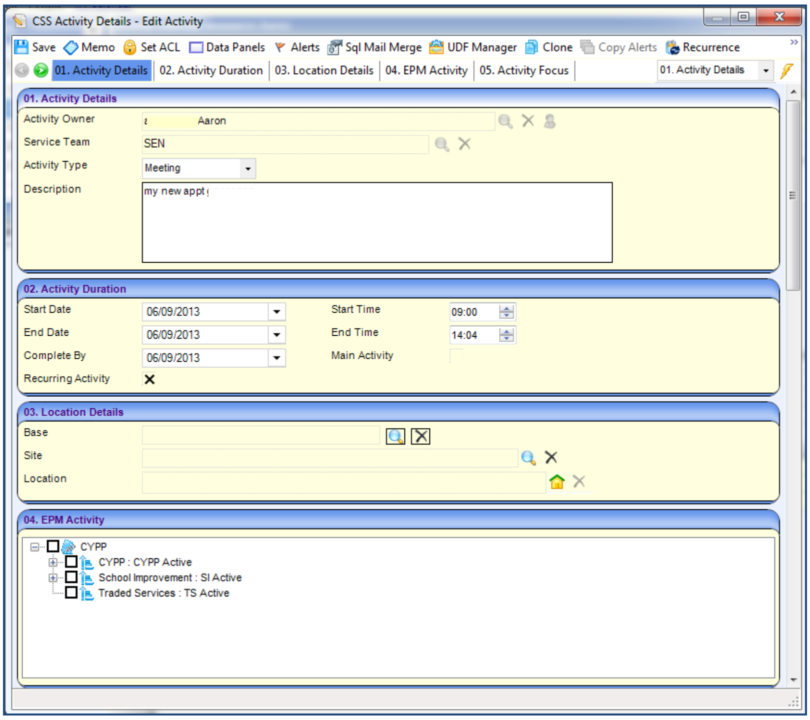
Example Entry in Application.ini File

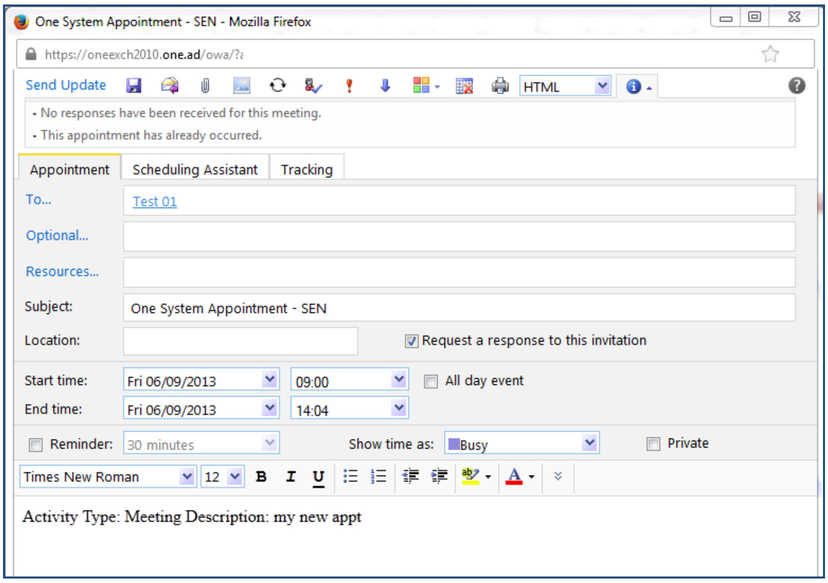
The following is a sample Application.ini file:

[CalendarServer]
ServerType=MSEXCHANGE
[MSEXCHANGE_EWS]
ServerURL=https://oneexch2010.one.ad/EWS/Exchange.asmx
Domain=one.ad
UserName=/iu5kfmXOuwA2QCNh4K09Q==
Password=hLsvZuJAdf8wqBmN2x1vvjFk1c+/ARMiWErT+/Aah/Q=
ProxyInUse=No
ProxyURL=
ProxyUserName=
ProxyPassword=
[MSEXCHANGE]
ServerURL=https://10.128.53.214/
Domain=lab-la02
UserName=nOJEQVVDsWW8qlZg8r7i2g==
Password=WHnQBf0UmYsqk5ILry9SUNNCCCHyPHfifJushO3Rhb4=
ProxyInUse=No
ProxyURL=
ProxyUserName=
ProxyPassword=

One Application → Outlook Field Mapping

The following screens display the field mappings between the One application and Outlook.




One System Appointment - SEN - Mozilla Firefox
https://oneexch2010.one.ad/owa/?
Send Update
HTML
- No responses have been received for this meeting.
- This appointment has already occurred.
Appointment
Scheduling Assistant
Tracking
To...
Test 01
Optional...
Resources...
Subject:
One System Appointment - SEN
Location:
Request a response to this invitation
Start time:
Fri 06/09/2013
09:00
All day event
End time:
Fri 06/09/2013
14:04
Reminder:
30 minutes
Show time as:
Busy
Private
Times New Roman
12
Activity Type: Meeting Description: my new appt

Scheduled Tasks – FSM History

Introduction

KB98294

Student View Points to Incorrect Field for FSM

This release ensures that the **EDUCATION_DETAILS.FSMEAL** and the **EDUCATION_DETAILS.FSM_END** fields are updated via a scheduled task and so the student view contains the latest FSM details.

A scheduled task has been developed to update the EDUCATION_DETAILS table with the latest FSM details. This enables LAs to update the FSM details using a scheduled task.

For more information, see *Technical Guide - v4 Scheduled Tasks*.

User Interface Changes

A new action item called **FSM History** has been added to the **Scheduled Task Actions** via the **Tools | Administration | Scheduled Task | Actions** panel.

LAs can add the FSM History action to the scheduled task for a particular time slot.

It is not possible to have the same action appear more than once on a scheduled task. However, it is possible to have multiple different actions set for the same scheduled task.

For more information, see *Technical Guide - v4 Scheduled Tasks*.

Data Processing Rules

After the **Scheduled Task | Action | FSM History** has been set up and scheduled to run, the FSM details of the **EDUCATION_DETAILS** table are updated as described in the following business rules:

1. Students who are active on the scheduled task trigger date are considered for update of FSM details in the EDUCATION_DETAILS table.
2. In One, FSM information can be recorded in two areas:
   - v3 Grants and Benefits module, as claim records.
   - v4 student core record, as FSM history records.
3. If a valid Grants and Benefits Claims record exists:
   - Valid Grants and Benefit claim records must meet the following conditions:
     - In **Student | Claim Details**, **Claim Status** is **Authorise**.
     - In **Module Administration | Claim Definition**, the **Claim Code** and **Category Details Code** is the first 3 characters of **Items in Category Item Code**.
     - In **Module Administration | Claim Definition**, the **Is FSM?** option is **True**.

   If the above conditions are met, the Grants and Benefits student claims details are verified as follows:

     - **Claim Start** is less than or equal to scheduled task trigger date.
     - **Claim End** is greater than or equal to scheduled task trigger date.

   If the above conditions are met for a student, the FSM History scheduled task updates the EDUCATION_DETAILS table as FSMEAL as **T** and the FSM_END field is updated with **Claim End date** value.

   After the EDUCATION_DETAILS table is updated with the FSM details, the student view is automatically refreshed with the latest FSM details.

If the above conditions are not met, then the student FSM history is verified as below.

1. If a valid Student FSM history record exists:

   If the third condition is not met, the student FSM history via **Focus | People | Students | Student Details | FSM History** is considered to update the EDUCATION_DETAILS table FSM details as follows:

   If the latest FSM history record against the student has the following details:

   - **FSM** flag is True.
   - **Start Date** is less than or equal to the scheduled task trigger start date.
   - **End Date** is NULL (or) greater than or equal to the scheduled task trigger date.

   If the above conditions are met for a student, the FSM History scheduled task updates the EDUCATION_DETAILS table. The FSMEAL is set to **T** and the FSM_END field is updated with FSM History **End Date** value.

   After the EDUCATION_DETAILS table is updated with the FSM details, the student view is automatically refreshed with the latest FSM details.

2. If neither of the above conditions are met for a student, the FSM History scheduled task updates the FSMEAL field in the EDUCATION_DETAILS as **F** (False) and the FSM_END field is set as **NULL**.

NOTE: The above changes do not update the **Student Details | FSM History** (CPD_FSM_HIST table), only the EDUCATION_DETAILS table is updated, which automatically reflects in the student view.

UK Bases

Introduction

The **UK_BASES** table is the **National Database of Schools** table used in extended searches for schools in One, One Online (v3 and v4), and A&T Back Office.

For the One Autumn 2013 Release, the **UK_BASES** table, which is a view of two tables **UK_BASES_EDU** and **UK_BASES_EDITED**, has been refreshed with the latest school data. This release contains a new seeded **Master** table which has been updated with the latest English and Welsh school information as provided by the Department for Education (DfE) and the Welsh Government (WG) EduBase.

Schools from other locales remain unchanged.

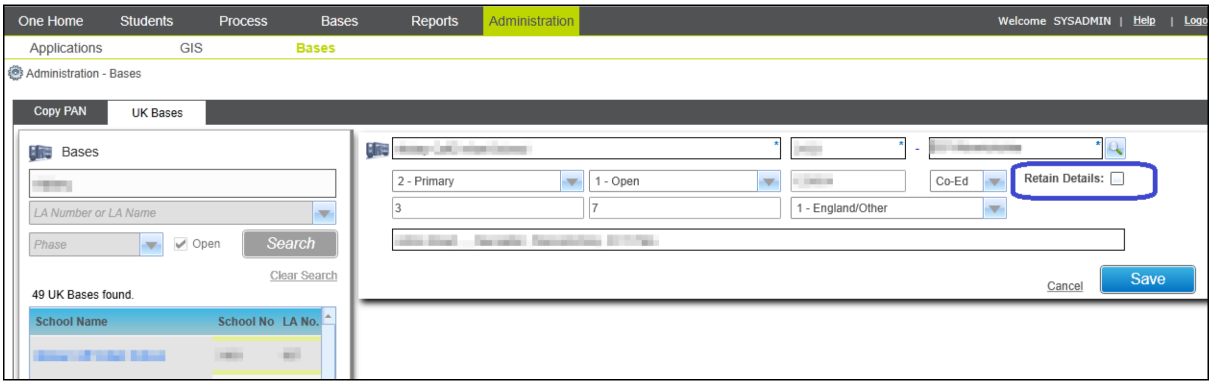
WARNING: Any changes made previously by local authorities to Base records in One will be lost after the **UK_BASES** table has been refreshed. Local authorities must make a note of any local changes <u>before</u> applying this release.

User Interface Changes

v4 Online | A&T Back Office | Administration | Bases | UK Bases

A new check box, **Retain Details** has been added to identify the changes to UK_BASES school details. From this release users can select the **Retain Details** check box to keep the changes made to national database schools. From the next One main release, the UK Bases update will not update the schools with the **Retain Details** check box selected, but will update other national database schools with the latest details from the DfE and WG Edubase.

Local authority users with **Read-Write** permissions to **Base Administration** (Main Business Process: **Admissions Set Up and Population** and Business Process: **Base Admin for Admissions**), can edit the UK Bases schools. Permissions are assigned via **Tools | Permissions | User Group Processes**.



Retain Details Business Rules

The following business rules apply to the **Retain Details** check box:

- Local Authority users can change **UK_BASES** school details and select the **Retain Details** check box to keep the base details unchanged, even when the next **UK_BASES** table update is supplied by the DfE and Welsh Government.
- To save any changes to a UK_BASES school details, the user must select the **Retain Details** check box. If a user tries to save without selecting the **Retain Details** check box, the following error message is displayed:

  To save changes, the retain details box must be ticked

- Any changes made by local authorities to a UK_BASES school details with **Retain Details** check box selected and successfully saved displays the following information message:

  Record successfully updated. Please note - When the ONE system is next upgraded to a main release there may be changes, however if the retain details check box is true, these changes will not be applied. If the retain details check box is not true, these changes will be applied.

Extended Search Criteria

In Admissions & Transfers Online, when the applicant searches for either of **Current School**, **Preference School** or a school which a sibling attends, the system in most cases searches on the UK Bases database. However, if the applicant chooses the Home LA Only option when searching for a Preference School, the system refers instead to the transfer group's Receivers.

The **UK_BASES** table provides a list of schools to choose from when adding a new school to the **Bases** module. The **UK_BASES** table is a view which displays all schools edited in A&T Back Office Online with the **Retain Details** check box selected (**UK_BASES_EDITED** table); along with all the National database schools (**UK_BASES_EDU** table), excluding the schools where the **Retain Details** check box is selected.

Web Server

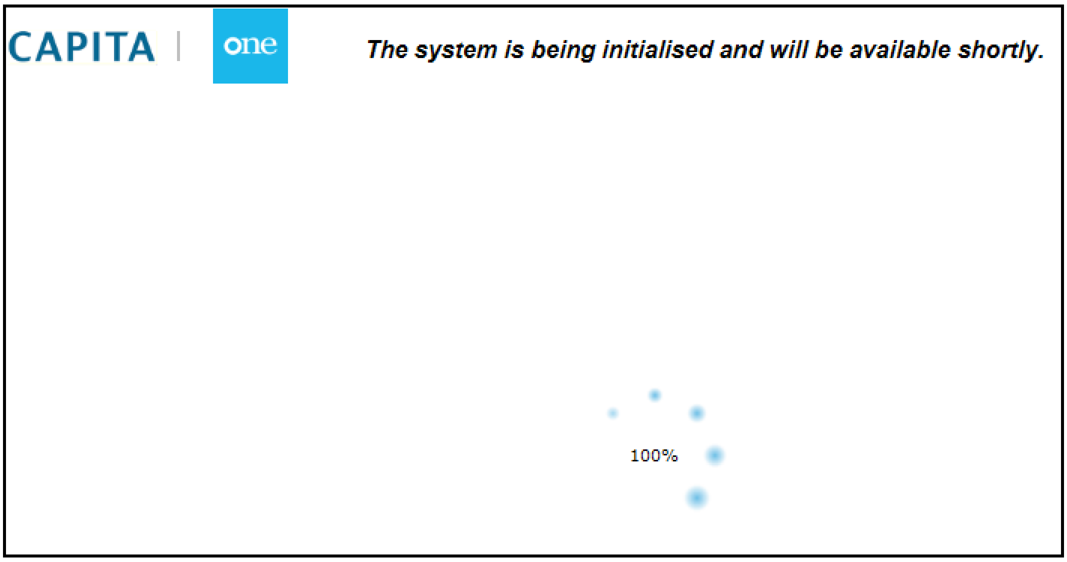
KB403164

This fix improves the performance when loading and refreshing lookup data for the browser based modules. This will also remove the need to restart the application pool on the Web Server(s) should the lookup cache fail to refresh properly during a user log-on.

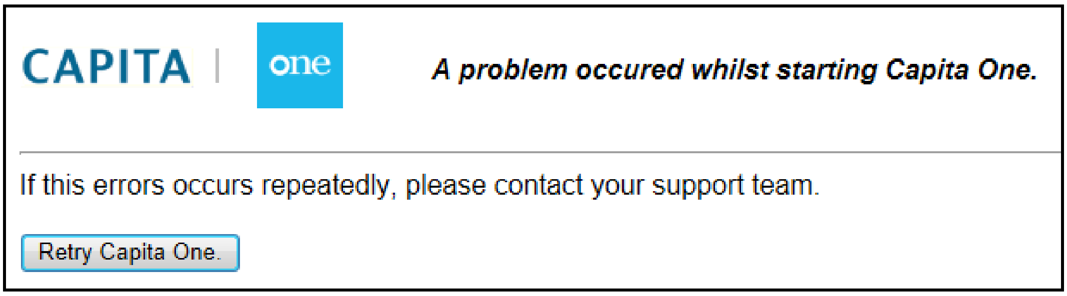
This hotfix also includes additional error notifications to the user. Notifications can be related to unexpected timeouts, network/connectivity problems, unresponsive code and data issues. If the error is not repeatable or intermittent, these new notifications may help support teams to identify local issues. If the error is repeatable, we would request that the user/support team logs a case as usual and forwards the error report to the One Service Desk to aid our investigations in to the cause of the error.

The following notifications might be displayed:

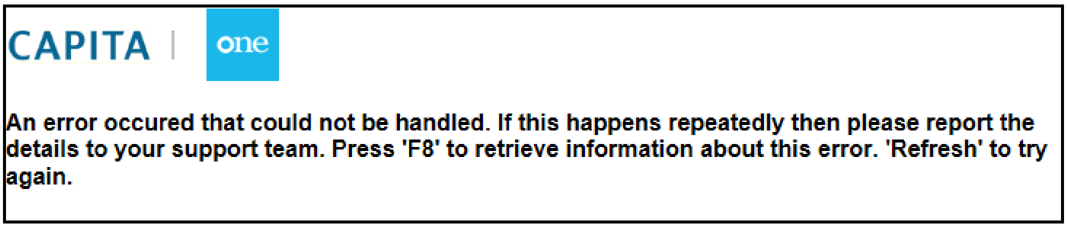
- If the server must start from a sleeping state, there might be a delay while v4 Online loads. The user is now notified that the server is waking.



- If the Capita One web server does not respond within the normal timeout limits, the user will be presented with the following screen. This replaces the occasional blank screen errors that were displayed previously. Users can click the **Retry Capita One** button to attempt another login without needing to close and restart the web browser. Users are advised to contact their support team if the error recurs.



- If an error occurs that has not been captured by another, more specific, error message the user is now be presented with the following screen:



The user can press the **F8** button to display the details of the error.

The user can then press the **Email** button to open their local email client and copy the error details in to the body of the message. The can then send the error details to the appropriate technical support personnel.

System Summer 2013 Release (3.51.205)

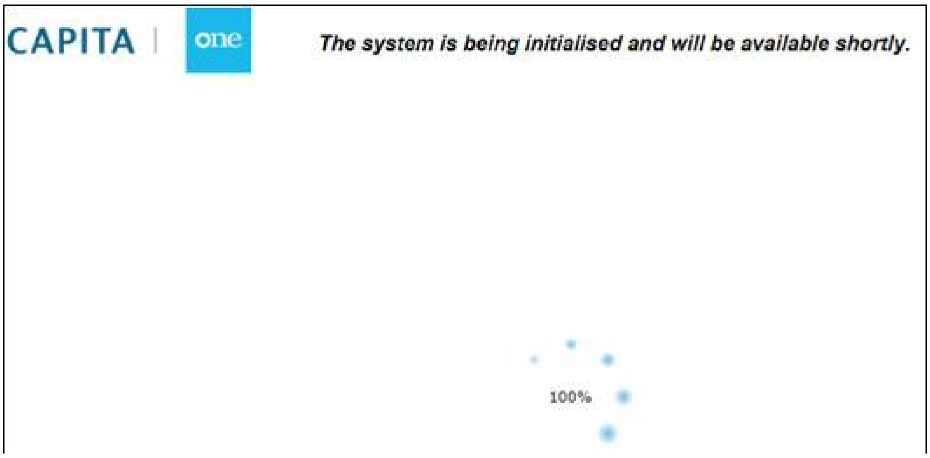
Logging Error Messages

KB403164

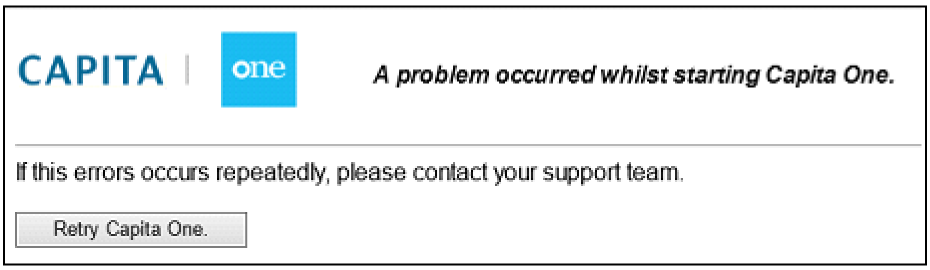
This hot fix supersedes hot fixes One Summer 2013 Release 3.51.201 and One Summer 2013 Release 3.51.203. The improved logging introduced in 3.51.201 could be quite intrusive for some users; this hot fix enables the user to continue more easily while still maintaining a log of issues as they arise.

The following notifications are displayed:

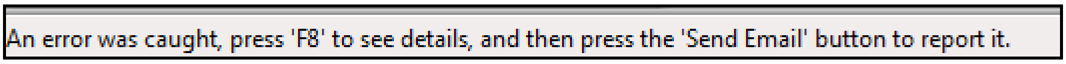
- If the server must start from a sleeping state, there may be a delay while v4 Online loads. The user is now notified that the server is waking.



- If the Capita One web server does not respond within the normal timeout limits, the user will be presented with the following screen. This replaces the occasional blank screen errors that were displayed previously. Users can click the **Retry Capita One** button to attempt another login without needing to close and restart the web browser. Users are advised to contact their support team if the error recurs.



- However if an error occurs that has not been captured by another, more specific, error message, the following message displays in the status bar of Internet Explorer rather than being displayed on the full page.



Click the **F8** button to display the details of the error in a new tab.

Note: To view this message the status bar on the browser has to be turned on via **View | Toolbar | Status bar** (If the menu cannot be seen click the **F10** button). Clicking the **F8** button displays the details of the error in a new tab or pop up window depending on the browser's setup.

Select the tab to display the logging information.

Click the **Email** button to open your local email client and copy the error details in to the body of the message. You can then send the error details to the appropriate technical support personnel.

System Summer 2013 Release (3.51.204)

.Net Framework

KB403213

Problem in selecting a person in the Key Contacts tab when .Net Framework 4.5 is installed.

When .Net Framework 4.5 version is installed on a machine, the check box control is not displayed in the Key Contacts tree view.

System Summer 2013 Release (3.51.201)

Web Server

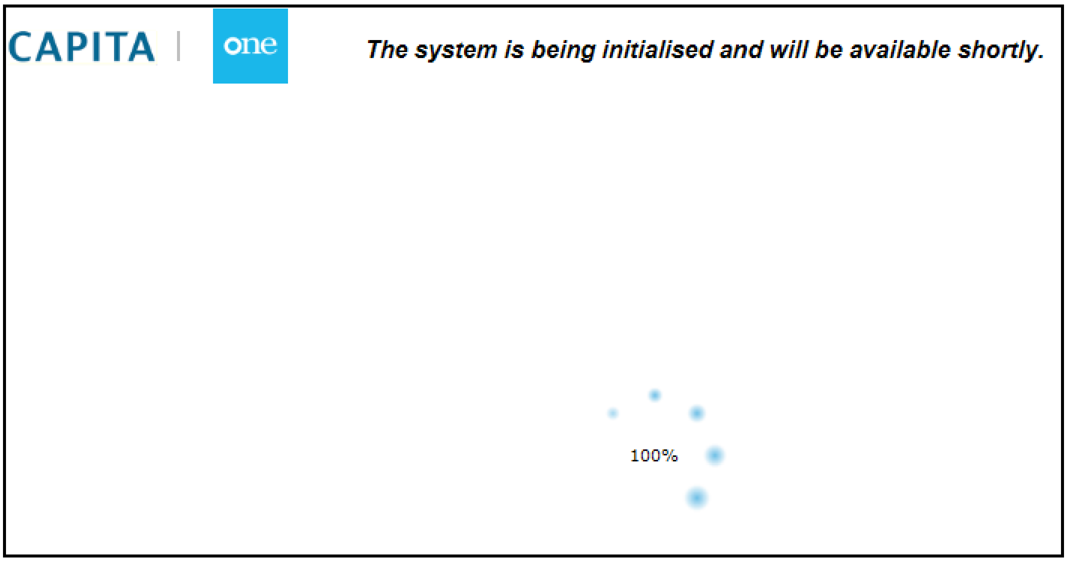
KB403164

This fix improves the performance when loading and refreshing lookup data for the browser based modules. This will also remove the need to restart the application pool on the Web Server(s) should the lookup cache fail to refresh properly during a user log-on.

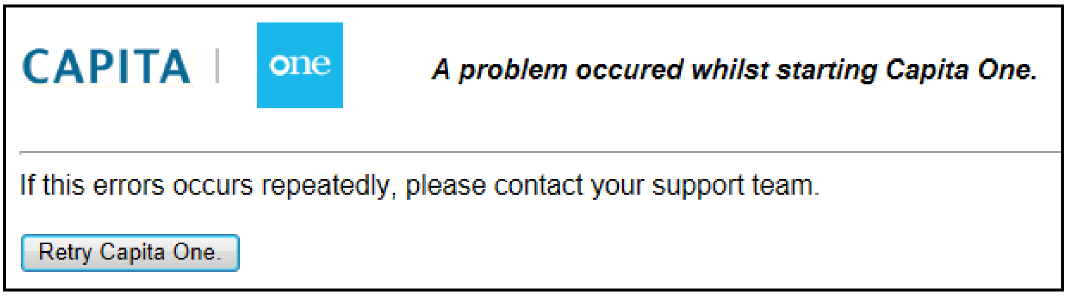
This hotfix also includes additional error notifications to the user. Notifications can be related to unexpected timeouts, network/connectivity problems, unresponsive code and data issues. If the error is not repeatable or intermittent, these new notifications may help support teams to identify local issues. If the error is repeatable, we would request that the user/support team logs a case as usual and forwards the error report to the One Service Desk to aid our investigations in to the cause of the error.

The following notifications might be displayed:

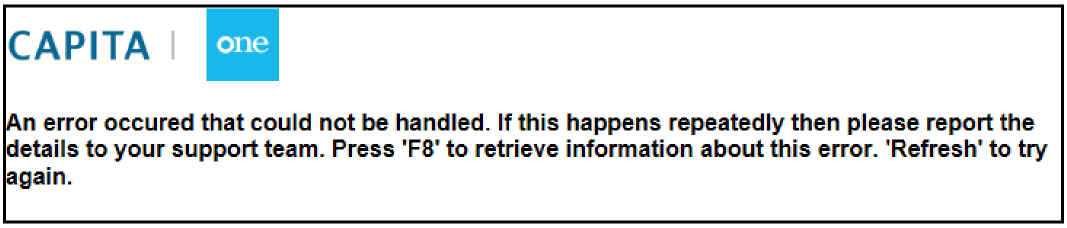
- If the server must start from a sleeping state, there might be a delay while v4 Online loads. The user is now notified that the server is waking.



- If the Capita One web server does not respond within the normal timeout limits, the user will be presented with the following screen. This replaces the occasional blank screen errors that were displayed previously. Users can click the **Retry Capita One** button to attempt another login without needing to close and restart the web browser. Users are advised to contact their support team if the error recurs.



- If an error occurs that has not been captured by another, more specific, error message the user is now be presented with the following screen:



The user can press the **F8** button to display the details of the error.

The user can then press the **Email** button to open their local email client and copy the error details in to the body of the message. The can then send the error details to the appropriate technical support personnel.

System Summer 2013 Release (3.51)

UK Bases

The **UK_BASES** table is the **National Database of Schools** table used in extended searches for schools in One, One Online (v3 and v4), and A&T Back Office (v3 and v4).

In One Online v4 and A&T Back Office v4, when making an Online Admissions Application, the school uses the **UK_Bases** table to search, except where the Home LA is chosen, referring back to the relevant transfer group's receivers, as appropriate.

The **UK_Bases** table also provides a list of schools to choose from, if you wish to add a new Base to the **Bases** module, directly in One v3 or One v4.

For the One Summer 2013 Release, the **UK_Bases** table has been refreshed with the latest school data. This release contains a new seeded **Master** table which has been updated with the latest English and Welsh school information as provided by the Department for Education (DfE) and the Welsh Government (WG) EduBase.

Schools from other locales remain unchanged.

WARNING: Any changes made previously by local authorities to bases records within One will be lost after the **UK_Bases** table has been refreshed. You must make note of any local changes <u>before</u> applying this release.

Data Items not Displaying in Tables

KB401272 - Data Items not Displaying in Tables, if Using # and @ Symbols.

Previously when using a v4 quick report, if a # data item was followed by an @ data item on the same row of the table, the @ data item was left blank when the quick report was generated, even if there were enough columns for all of the data items.

Now both the # data item and the @ data item display correctly, even if they are on the same row in the table on the quick report.

The following graphic displays the table when a quick report is edited, and both the # and @ symbols are used:

Internal Code: #FOCUS.INTERNALCODE	Start Date: @STARTDATE

The following graphic displays the table as it should be after a quick report has been generated:

Internal Code: A	Start Date: 24/05/2013

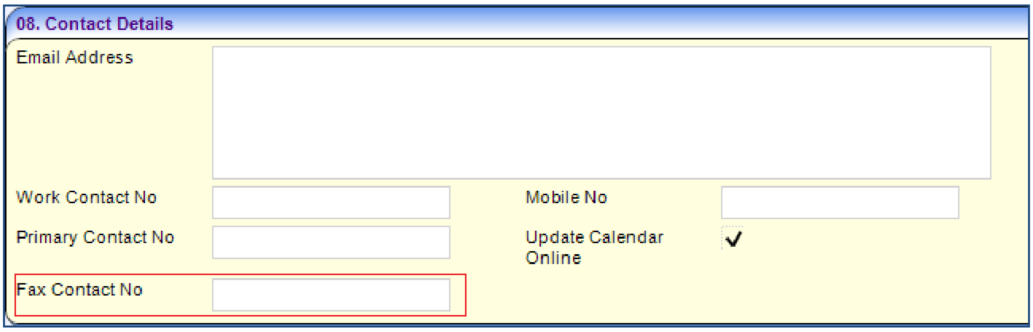
Fax Number

KB401571 - Unable to Add, View, or Maintain Fax Number

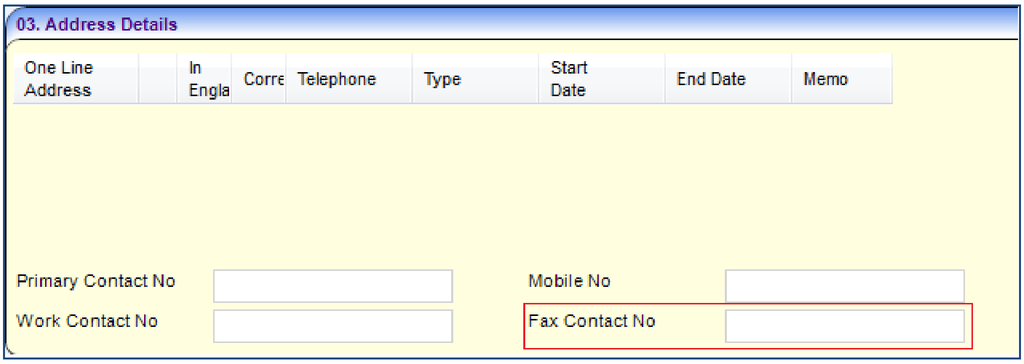
A **Fax Contact No** can be added in the **Person** and **ICS Person** contact details.

This is a free text field with a limit of 18 characters.

Focus | People | Person | Contact Details:



Focus | People | ICS Person | Address Details:

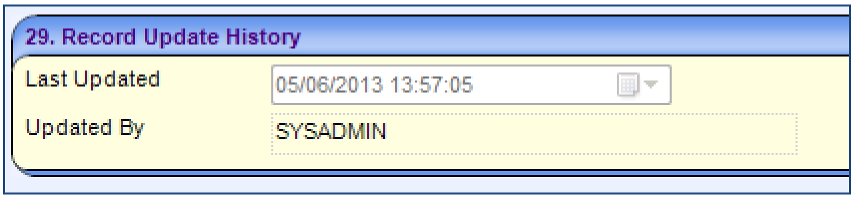


Updated By Field

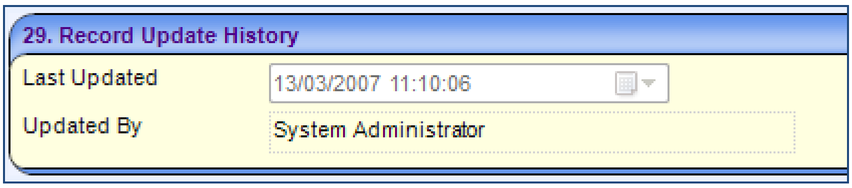
KB401037 - Last Updated By Function in v3, Available in v4

One v4 has been updated so that the user description rather than the user name (login) displays in the **Updated By** field in the **Record Update History** panel.

Before this release:



In this release:



Attendance Reports

KB402135 – EntityID Parameter to Replace StudentID Parameter in Student Attendance Link Section

A change has been made to the *v4 Linked Reports Handbook*, which can be found on the **One Summer 2013 Release DVD | v4 Users** folder.

In the section **Report Parameter Details Exchanged in the v4 Client,** the **Parameter Name** listed against **Attendance Reports** was **StudentID**. The correct parameter is **EntityID**.

If the reports are amended to use EntityID as the parameter name they will function as expected.

System Spring 2013 Release Service Pack 1 (3.50.100)

Purpose

Silverlight Version 5

In the One Spring 2013 Release (3.50), One migrated to Silverlight 5.

Now, on a client machine where Silverlight has not been installed, you are prompted to download version 5 from the Microsoft web site.

KB401746

Error: Server is Challenging Client Credentials

When a user attempts to open an uploaded linked file record, and their user session has timed out, the following error message is displayed:

Error: Server is challenging client credentials.

To resolve this issue, when the session has timed out, One displays the Login dialog for the user to re-authenticate their session and allow the process to continue.

Within Exclusions online, after successful authentication the user needs to open the linked file record again, which begins the download process. All other areas of v4 online automatically download the selected linked file record, without the user opening the linked file record again.

System Spring 2013 Release (3.50)

Introduction

In this release, the System project have made improvements to the **Linked Files** area, that follow on from the changes made in the One Autumn 2012 (3.49) release. The changes have been made to v4 Client, v4 Online and v4 Exclusions Online; details of which are noted below along with resolved defects and customer requested improvements.

Linked Files

- Increased upload limits
- Centrally manage upload limits
- Option to upload a file as soon as it has been linked
- Automatic removal of the uploaded file from the client PC
- Improved download performance
- Enhancements to the display of message dialogs.

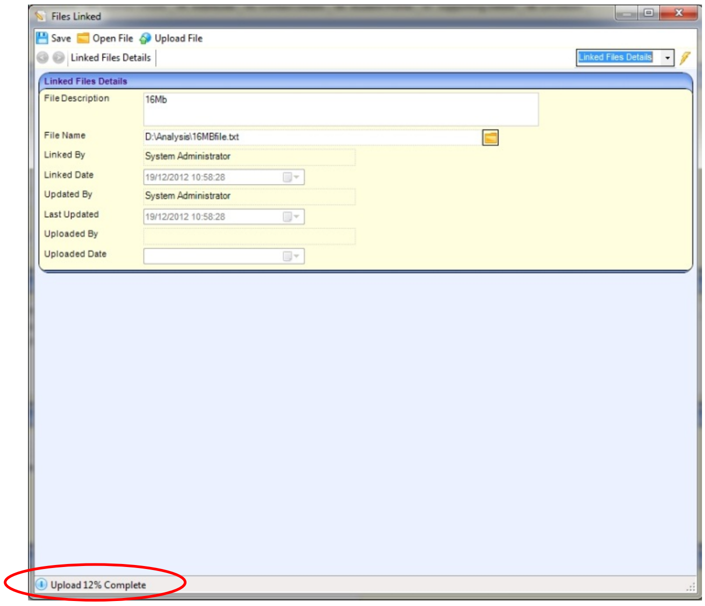
Linked File Improvements

Improved Upload Limits

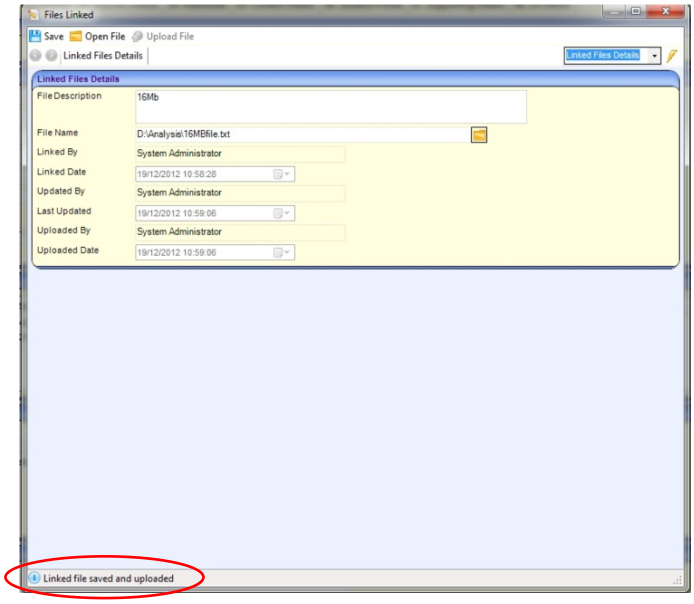
In the One Autumn 2012 (3.49) release the maximum upload limit was set as 15 MB. With this release the maximum upload limit has been increased to 150 MB.

Clicking the **Upload** button now shows the progress of the upload in percentage terms. When the upload has completed a confirmation message is displayed.

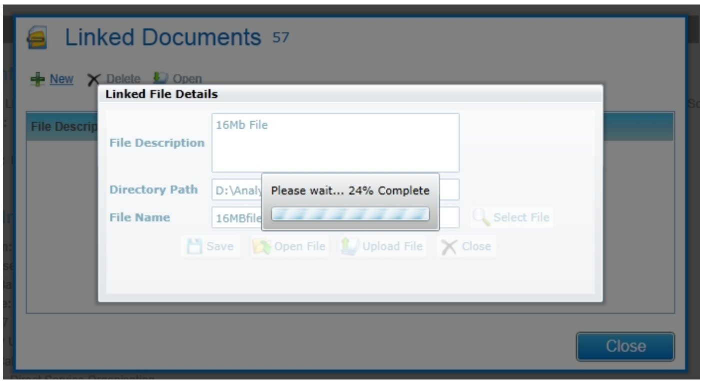
V4 Client – Upload Progress



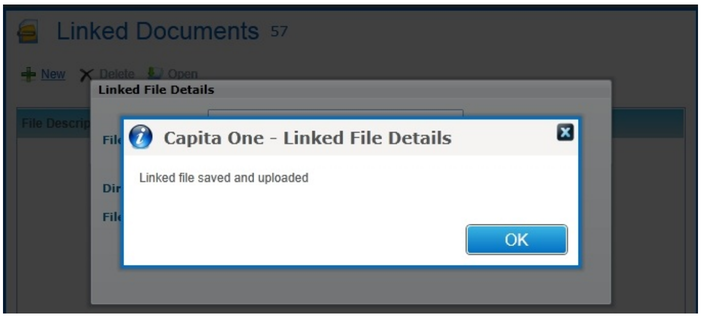
V4 Client – Upload Complete



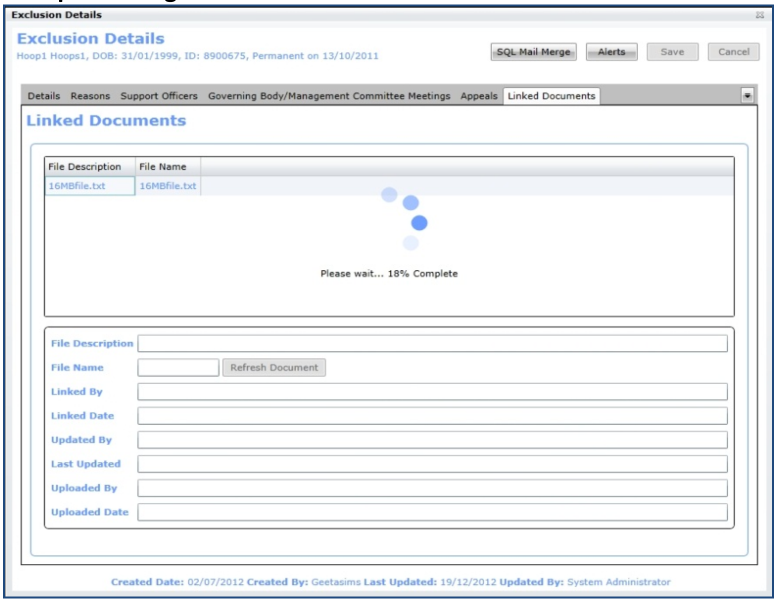
V4 Online – Upload Progress



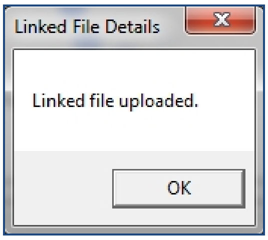
V4 Online – Upload Complete



V4 Exclusions Online – Upload Progress



V4 Exclusions Online – Upload Complete



In previous versions when uploading a linked file, One would treat the file as a single piece of data and attempt to upload the file. This was not an issue with small files. However, if a user attempted to upload larger files, this could result in timeout issues, which in turn would cause the upload to fail.

With this release, One manages this process by uploading the file in 1 MB blocks of data, rather than attempting to upload the whole file. By doing this, the potential timeout issues during the upload process are greatly reduced and the upload is managed more efficiently, especially where the speed of external connections by offsite professionals may not be as robust the internal network connections at the authority.

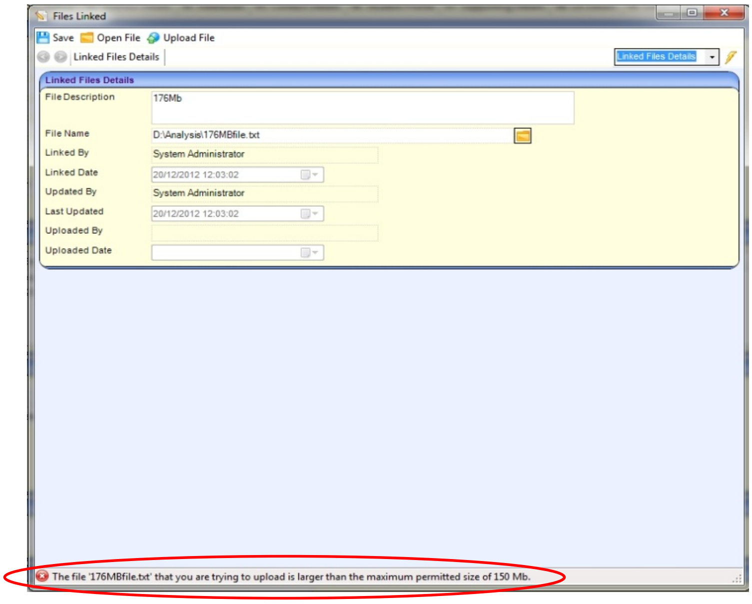
NOTE: One holds a default value for data chunks of 1MB and for this release this is non-configurable.

When a user selects to upload a linked file, One checks the file size against the upload limit. If the file size is found to be greater than the specified upload limit, One displays a confirmation message which informs the user of the following:

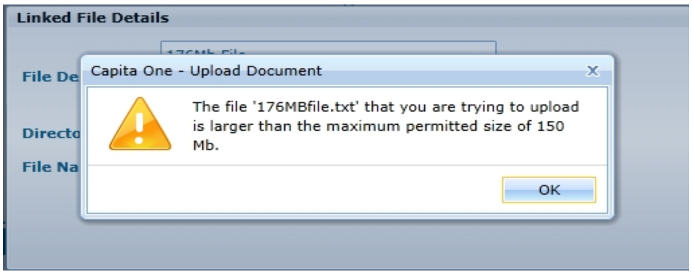
- The file name.
- The selected file is greater in size than the permitted upload limit.
- The applicable upload limit.

The selected file can be successfully linked, but it cannot be uploaded; this functionality has been applied to the whole of One v4.

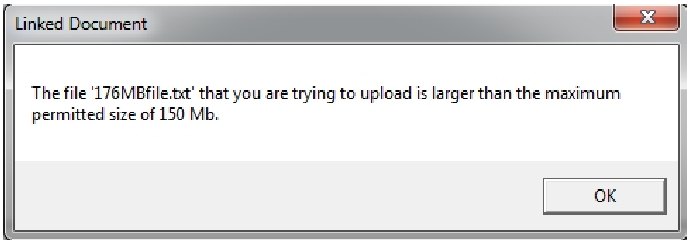
V4 Client



V4 Online



V4 Exclusions Online



V4 Exclusions Online currently allows a user to upload multiple files at the same time. All linked files are individually selected and linked. However, when clicking the **Save** button, One attempts to upload all files at the same time.

IMPORTANT NOTE: The changes to the upload routine do not account for multiple files and it is therefore recommended that files be linked and uploaded individually.

Centrally Manage Upload Limits

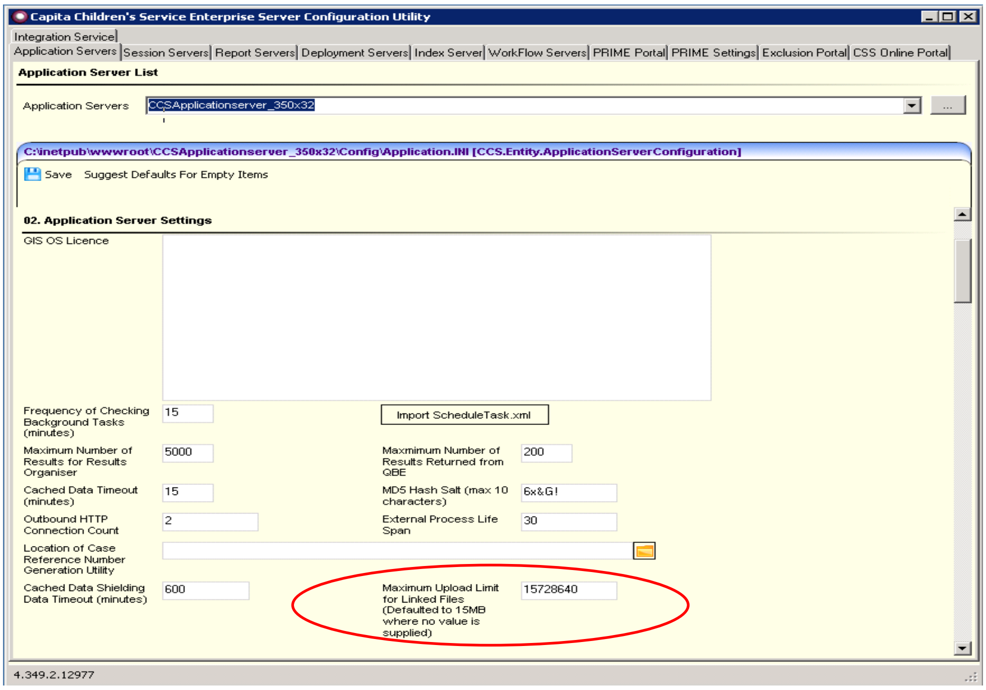
Previously, each of the v4 applications had distinct upload limits. In this release, all of these individual settings have been removed (previously v4 online setup was in the CSS Online Port or the CCS Configuration Utility). One now provides a centralised setting within the **Configuration Utility** routine which is used by all of the One v4 applications to determine the maximum file size that can be uploaded.

This new setting is identified as **Maximum Upload Limit for Linked Files** in the **Application Servers** tab of the **Configuration Utility** and is displayed in the **Application Server Settings** section. By default this is set to 15 MB, but can be configured to different values by the LA with the following validation rules:

- Value cannot be anything other than a numeric whole number
- Value cannot be blank – One always sets a value equivalent to 15 MB
- Minimum value of 15 MB
- Maximum value of 150 MB

NOTE: The Configuration Utility is managed by the System Administrator, therefore, they need to liaise with the LA users to agree upon and set the required maximum upload limit to be used by One, if something other than the default value of 15 MB is required.

The limit value should be entered in bytes e.g. from 1 MB (1048576 bytes) to 150 MB (15728640 bytes).



Option to Upload a File as Soon as a File has been Linked

In previous versions of One, when a user linked a file it was automatically uploaded to the One database. However, a number of customers advised us that they did not want linked files to be automatically uploaded to their database. As a result of this, the process was changed in the Autumn 2012 (3.49) release, in to two distinct processes which required the user first to link a file, then request that the linked file be uploaded, if required.

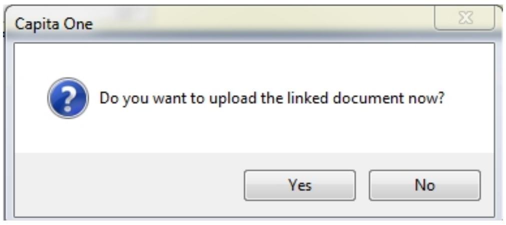
After the Autumn 2012 (3.49) release, a number of customers stated that they always wanted linked files to be uploaded to the One database and by splitting the **Link** and **Upload** functions could lead users to link the files, but forget to upload them.

In order to satisfy both sets of customers we have changed the linked files functionality, so that where a file is linked a message prompt is displayed asking for confirmation that they want to upload the linked document immediately.

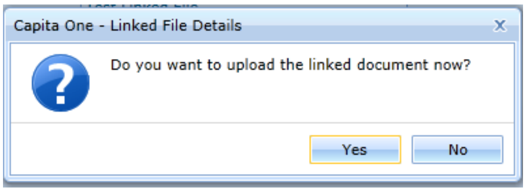
- Selecting **No** closes the message box, without the file being uploaded and the user can upload the file at a later date, if required.
- Selecting **Yes** uploads the linked file straight away.

This change has been applied to both v4 Client and v4 Online.

V4 Client Upload Message



V4 Online Upload Message



Automatic Removal of the Uploaded File from the Client PC

KB116064

When an uploaded linked file is opened in v4 Client, a copy of the file is retained on the client machine in a temporary directory. When an uploaded linked file is opened in v4 Online, a copy of the file is stored in the **Downloads** area of the browser.

NOTE: Different operating systems use different directories to retain copies of files; we have tested the changed functionality on Windows 7, Windows XP and Windows Vista.

This has been identified as a security concern and as a result we have made changes to the v4 Client software so that copies of files are automatically removed from the client machine. In v4 Online, the user is notified of files that need to be manually removed.

NOTE: The above change has not been included in the v4 Exclusions Online application.

v4 Rich Client

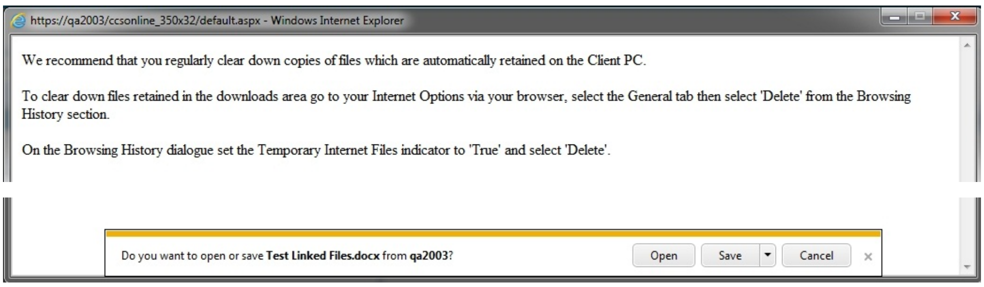
Where a file has been uploaded and opened, when the user returns to the **Files Linked** window and then closes the window, One automatically removes copies of opened, uploaded files from the following temporary directory:

C:\Users\username\AppData\Local\Temp\Capita V4.

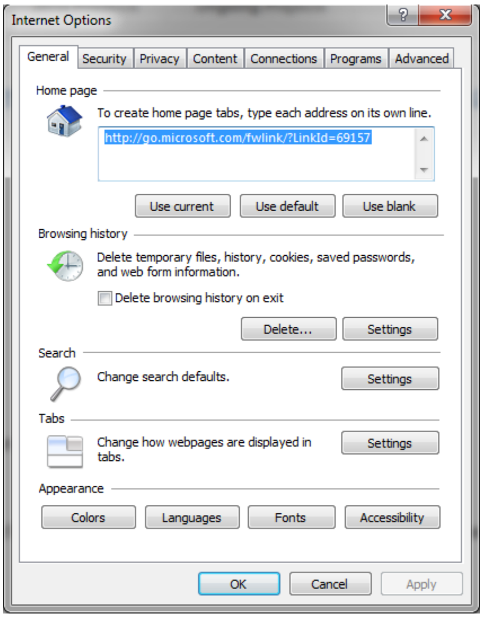
V4 Online

The automatic removal of a file cannot be achieved within the v4 Online application, due to limitations within the Silverlight architecture. However, when the **Open File** button is clicked on an uploaded file, the following message displays recommending that you regularly clear down copies of files, together with instructions on how you can complete this process.

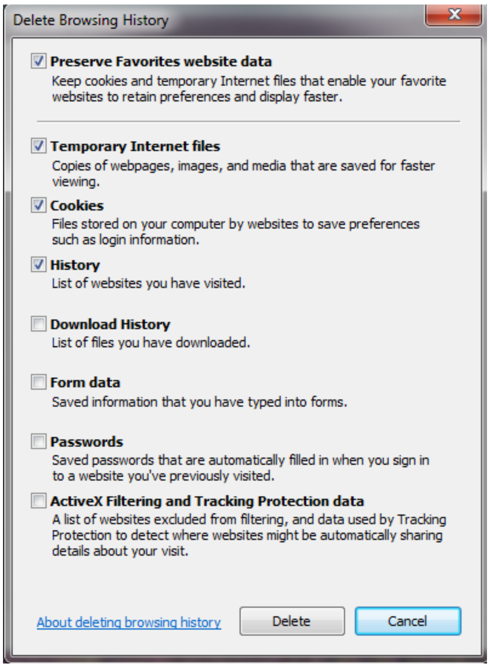
Example Explorer Window



Example Internet Options



Example Delete Browsing History



In some circumstances the following error message may be displayed:

Error occurred while downloading a file: Server is challenging client credentials.

This is likely to be as a result of the file already being open or in use.

NOTE: Within Governors Online there is a **Quick Reports** window and a selected report can be output as Word or PDF. When either of these options is selected, One displays the same text as the example download window, shown above.

Improved Download Performance

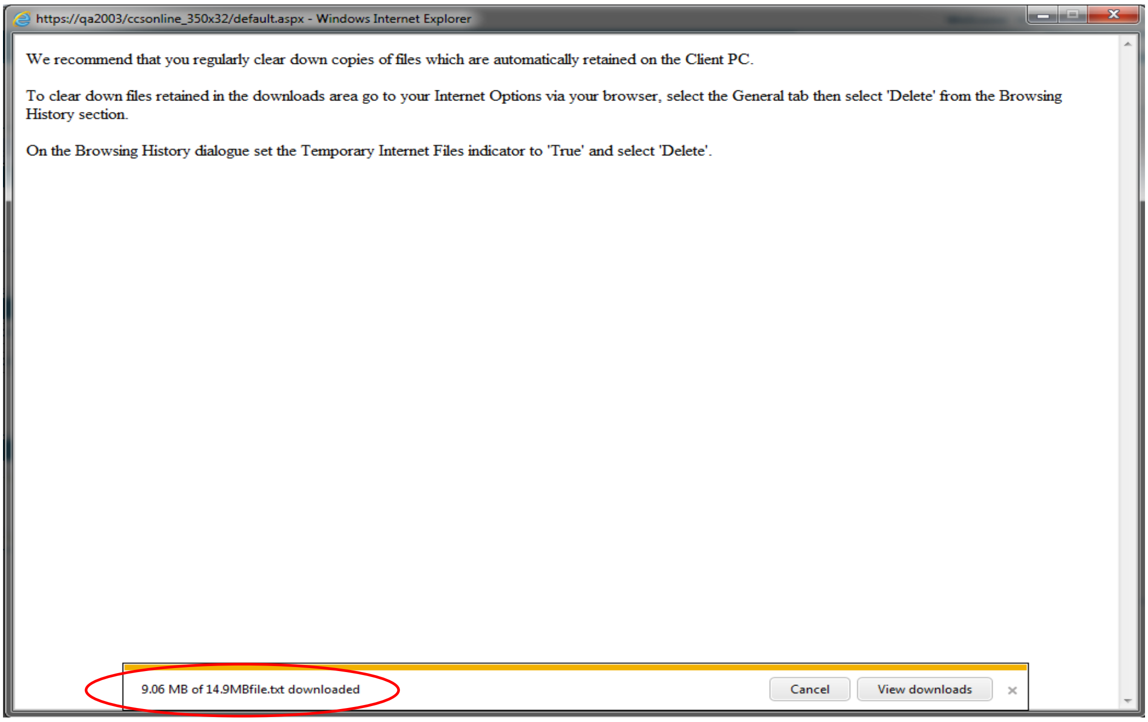
As a result of the increased maximum upload limit to 150 MB, we have also made some changes to the **Download** function so that files are retrieved and opened more efficiently.

Where a file has been uploaded and the user selects to open the file, One shows the download progress, based on bytes, and once completed opens the selected file.

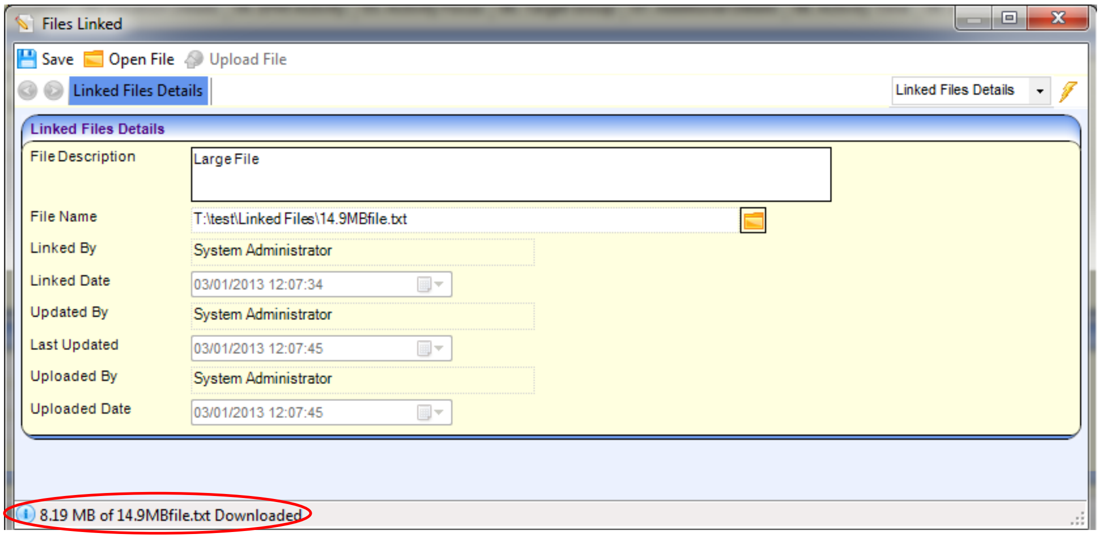
We have tested downloading files up to the maximum 150 MB upload limit and have found that the download, even for very large files, is not any slower than if you opened the same file locally outside of the One application.

Obviously the larger the file, the longer the download takes. However, using the default upload limit of 15 MB as a baseline it has taken less than 13 seconds to download a file of that size within the One application.

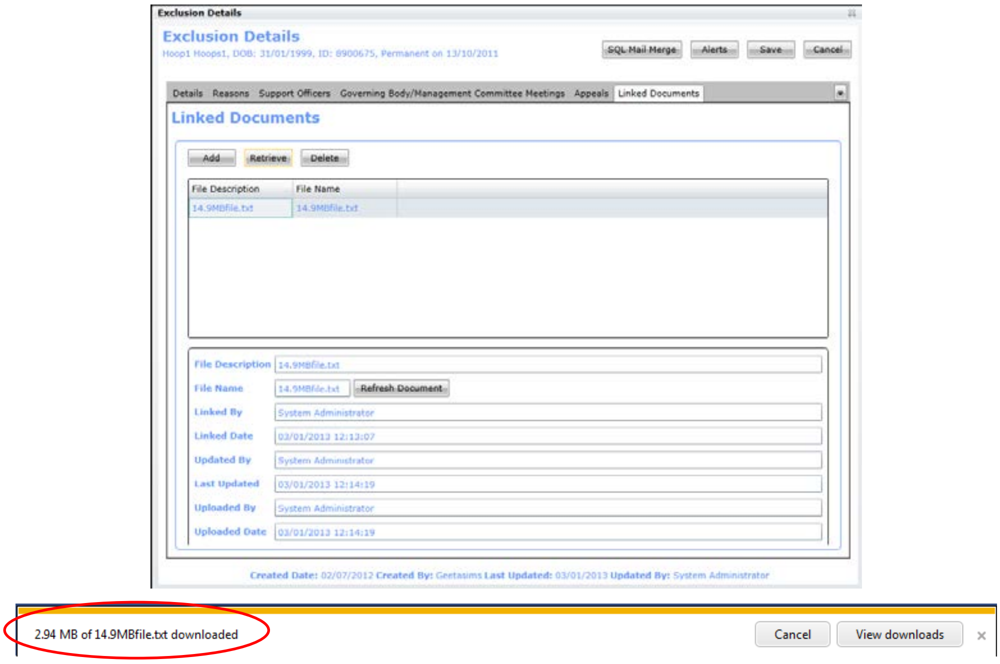
V4 Online - Download



V4 Client – Download



V4 Exclusions Online - Download



If a user selects to open an uploaded linked file and One has timed out due to inactivity, the v4 Online user sees the following message:

Server is challenging the client credentials.

One displays a login dialogue to refresh the users session and allow the user to select the **Open** button again.

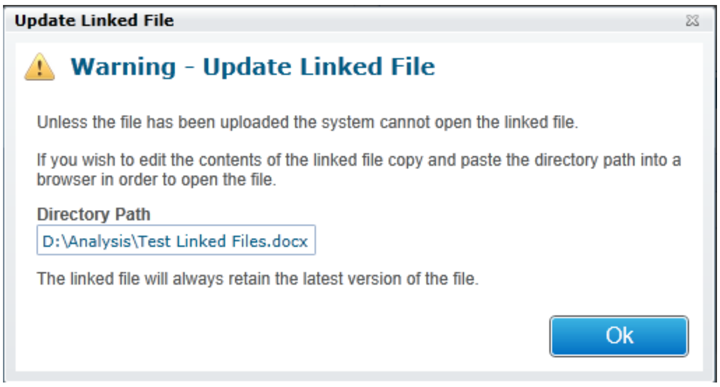
Due to the complexity of this issue, it could not be resolved in time for the Spring 2013 (3.50) release, but will be resolved in a subsequent Service Pack. To work around this issue, the user needs to refresh the web page and navigate to the route where the linked file was being opened.

Note: The issue is included within the Spring 2013 (3.50) Known Issues document and only affects uploaded linked file records where the users session has timed out e.g. the local machine has been left locked whilst being logged into v4 Online.

Enhancements to Display of Message Dialogues

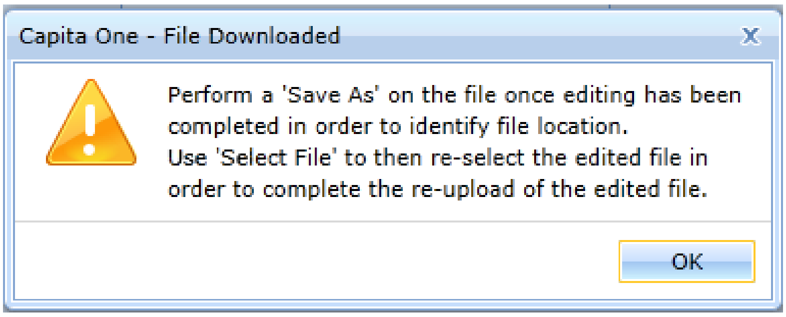
The following messages boxes displayed in the v4 Online application have been updated so that the text layout is displayed in a uniform manner and the information provided is clearer:

Update Linked File



- Body text re-aligned
- Directory Path label added above the actual directory path shown

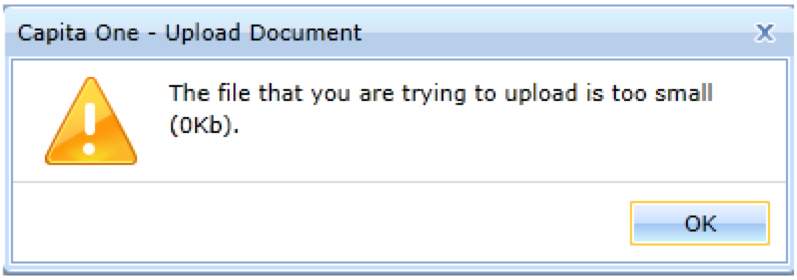
Capita One – File Downloaded



- Body text left aligned

Capita One – Upload Document

When uploading a file, One checks the size of the file and where it finds that the selected file is 0Kb, a new message box is displayed as shown below, the file can be linked, however, the upload <u>cannot</u> be completed:



- Body text left aligned
- File size displayed

NOTE: An example of a small document would be a blank Word document which has a size of 0Kb.

Permissions

Previously in One v4 Online, where a user had **Read** permission granted in the **Linked Documents** business process they could not download an uploaded linked file. However, this was possible within the v4 Client.

In addition to this, if the user had **Read** access to the entity being accessed e.g. Student or Base and Read permission was granted to **Linked Documents**, One was not displaying the linked files or documents and therefore was not allowing the user to see or open any records.

In this release we have corrected these discrepancies and the following behaviour applies where **Read** permissions have been granted for the **Linked Documents** area:

- Linked file records are displayed.
- A file can be opened (downloaded).
- Linked File records are displayed where **Read** access is granted to the corresponding entity e.g. Student and Linked Documents.
- All options other than **Open File** are disabled

The above changes have been applied to the following modules:

- A&T Back Office
- CSS Online
- Bases

Additional Improvements

KB95898

Previously, One did not allow email addresses to be fully recorded, due to a 50 characters limit. In this release, the **Contact Details | Email Address** field has been increased to allow up to 200 characters for both v4 online and v4 client.

KB401187

Previously, users were unable to run linked reports in the **Person Details** screen; they could only be run via **Focus | Analysis Reporting | Report | Reports**.

For this release, the **Linked Reports** functionality has been extended to the **Person Details** screen. The **Reports** link is available via the **Links** panel.

A new report folder, labelled **Person Details Reports** has been created in the **Reports Repository** folder to store any linked reports for Person Details. The functionality is the same as available in other screens that can run linked reports.

Deleting Automatically Downloaded Files via v4 Client

When running certain processes or reports within the v4 Client, One downloaded temporary files without the user's knowledge and these files were not always removed from the local machine when the task was completed.

In this release, a new folder labelled **Capita v4** has been created, to store any files automatically downloaded when running reports or any other process. After closing the v4 client, One purges any files within the folder. To view the **Capita v4** folder and its contents enter **%TEMP%** into a windows explorer **Search** window, then open the **Capita v4** folder.

If a user has a file open which is stored in the **Capita v4** folder, when closing the v4 client, One is not able to delete the file due to a sharing violation, but the deletion is completed on closing the client, if there are no sharing violations.

Maintaining Easting & Northing GIS Values

Previously, where the **Easting** or **Northing** value of an address had been updated to generate more accurate distance calculations within One, for a number of users the values were being over written when importing address information.

For this release, One records where an address has had the **Easting** and **Northing** value updated manually by a user.

The new **DB** column created to record this value is *ADDR_HD.GIS Updated*. Where the value is T, this means the GIS information has been manually updated and where the value is F, it has not.

Upon upgrading, the field is **Null** and not updated; this enables LA's to monitor where the values have changed from what they were originally or if they have been completely removed.

The value is set as **T** in the following scenarios:

- An existing address record with no Easting & Northing is manually updated.
- When creating a new address record manually, the **Easting** & **Northing** values are populated.

The value is set as F in the following scenarios:

- An existing address record where the **Easting** & **Northing** values are removed.
- When creating a new address record manually and the **Easting** and **Northing** values are left blank.

When an LLPG file has been imported in v4 Online, and the **Bulk Match** and **Updated Address** routines are processed, One validates the new flag, and where the value is T and a matching address record has been imported, the **Easting** and **Northing** values are not overwritten, regardless of the user selecting to overwrite existing values.

Resolved Defects

Crystal & SSRS Report Permissions

Where permissions are granted to the **Crystal** or **SSRS** report folders, One was not validating the permissions correctly, or it was not storing the permissions correctly.

Crystal Reports - Where a user group was given access to Child Folder 2, as displayed in the example below, One would display the reports that existed within the parent & child report folder. This has been corrected and One only displays reports stored in permitted folders, regardless if it is a parent or child report folder.

Parent report folder

- Child Folder1
- Child folder 2

After upgrading from the Autumn 2012 (3.49) release to the Spring 2013.(3.50) release, users may find that some reports are no longer available; this is a result of the user not being permitted to run reports for the folders that the missing reports reside in.

Where user's reports are not being displayed, the System Administrator needs to ensure that the User Group the user is associated with has been permitted to run reports for the folder the reports reside in.

SSRS Reports – Previously where access was granted to an SSRS report, One was incorrectly populating the **Permission Token** value and as a result SSRS reports were not displayed to the user; this has been correct for Spring 2013 (3.50).

When viewing reports via **Focus | Analysis Reporting | Reports** One has been updated to display the full SSRS report folder structure. Where there are child folders and the user has not been permitted to run reports, One does not display any reports if, and when, a sub folder is selected.

KB90378

The following core fields were reported to be missing from the **Base Definition** screen:

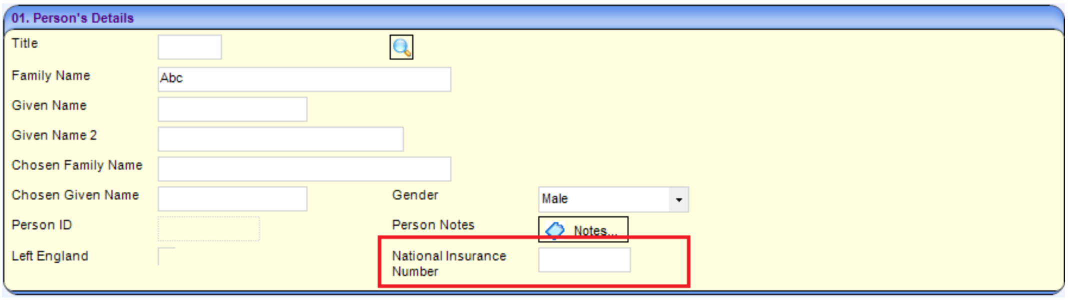
- Education Office
- SEN School Type
- Cost Centre.

These fields now display in the **Basic Details** panel and can be edited.

KB96304

A number of customers have requested the National Insurance Number is displayed against a person record. For this release the field displays on the **Person Details** screen, in the **Person's Details** panel.

The field is editable and has all the validation as in One v3 and the **ICS Person** screen.



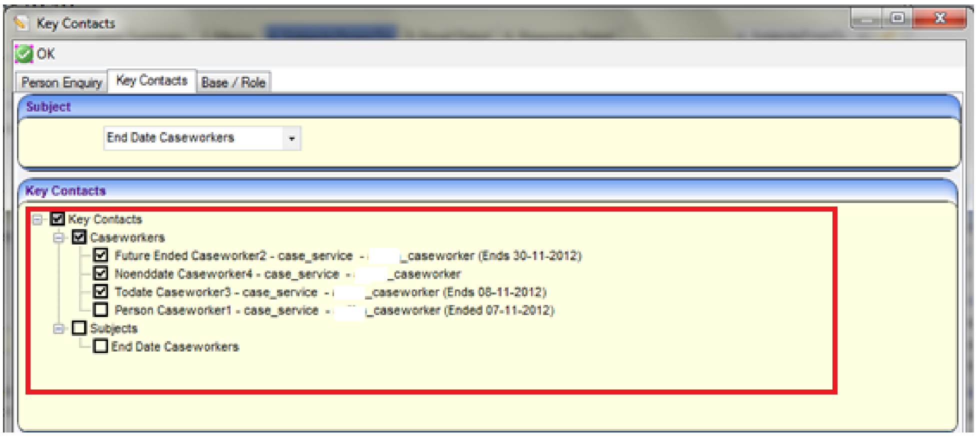
KB96377

Customers reported that they could not easily view which contacts were active or inactive, due to their involvement with the subject within the **Key Contacts** dialog.

For this release, where the **Key Contacts** section has been updated to display **End Date** information, this informs the user whether any correspondence should be sent to certain contacts, e.g. where the **End Date** is past they are no longer involved with the subject and as a result possibly do not need to be included.

The following text is displayed against a contact record based on the **End Date** value, where populated:

- If the **End Date** is blank – no text is displayed.
- If the **End Date** is before system date, the following text displays, with the date value replaced:
  Ended DD-MM-YYYY
- If the **End Date** after system date, the following text displays, with the date value replaced:
  Ends DD-MM-YYYY



KB96893

If a user had left the system for a period of time and the session had timed out or if they had locked their work station, when trying to login with the correct credentials another empty **Login** dialog was displayed.

This issue has been fully investigated and One now allows the user to login after entering the details once, and does not display multiple empty **Login** dialogs.

KB98459

When associating a new Role or Post with a person record, if a Post record existed and was associated with the person where the **Post Description** had more than 40 characters, an error was displayed. The error has been resolved and One now allows the user to associate any new Role or Post records created against a person record, where the Post Description is more than 40 characters.

KB99909

If a number UDF had been created and the **Default** value was blank, One was displaying the value as 0. This has now been corrected to display the value as blank.

There was an issue with the displaying of values for a number UDF with regards to precision, e.g. a value with precision of 2 should be displayed as **XX.XX**; this has now been rectified.

KB102657

Previously, when managing address history records, users had to select the **Address Type** field in the browse grid multiple times to display the drop-down options. This has been resolved in this release and One now displays the drop-down values on a single mouse click.

KB105406

Where a customised help had been created via **Help | My Help On**, One would not open the location of any hyperlinks in a default browser set for the local machine.

This issue has been resolved for this release and One now opens the location of the hyperlink in the default browser set for the local machine.

KB109672
Users could set Access Control Lists (ACLs) for EY Providers, where the user was in a group, but denied permission on the Business Process. In this release, One correctly validates the permission set and does not allow the user to access the ACL functionality.

KB114011
In v4 Client via **My Home Page | My Activities**, when selecting either the next **>** or previous **<** calendar buttons there is no longer an error due to timing out, on a request for activities based on the selected date. The activities listed in the **My Activities** section are now dependent on the date selected and are retrieved based on the date selected by the user.

KB114526
When using the mouse to **Copy** or **Cut and Paste** any text, One was duplicating the text in text fields or memo details. One has been updated to ensure that the copied text is no longer duplicated when pasting into One.

KB114790
The **To** and **From** fields available via **Communication Log | Log Follow Up** area, now correctly populate the correct addressee based on the direction of the follow-up log.

The **CC** field value is omitted from the follow-up log, if the follow-up log is in the opposite direction of the original communication log entry.

The **CC** field in the follow-up log is automatically populated with the same value as that in the original communication log, if the follow-up is in the same direction as that of the original communication log.

KB116064
When opening a linked file record within the v4 Client, One stored the file within a temporary directory and this file was not removed from the local machine when the document was closed. In this release, One removes any linked files stored on the local machine in the temporary directory.

Where the downloaded or open linked file is still open, when the **Files Linked** window is closed, the following message displayed to alert the user that the file was not successfully deleted from the user's machine.

> Unable to delete file as file C:\Users\XXXXX\AppData\Local\Temp\Capita V4\ZZZZZ is open. where XXXX is the local machine username, e.g. 'jsmith' and ZZZZZ is the filename that could not be deleted.

To resolve this issue, open windows explorer window and in the path field type **%TEMP%**, open the **Capita V4** folder and manually delete the file.

KB117389/KB118143
In v4 Client via **Tools | Permissions | User Group Permissions**, it was difficult to set appropriate permissions for user groups, as there were duplicate permission labels.

For this release, the duplicate permission labels have been reviewed and updated to reflect the function each permission allows, the updated labels do not affect existing permissions within One.

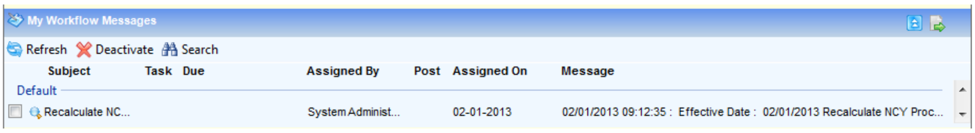
KB117438
It is now possible to search for person on the **Person Enquiry** screen, using a combination of the **Name** and **Base Name** fields, without incurring an error; One successfully returns any matching records.

KB400795
When the **Recalculate NCY** routine was processed in the v4 Client, due to the potential number of records that could be processed, One would time out and the process would not complete.

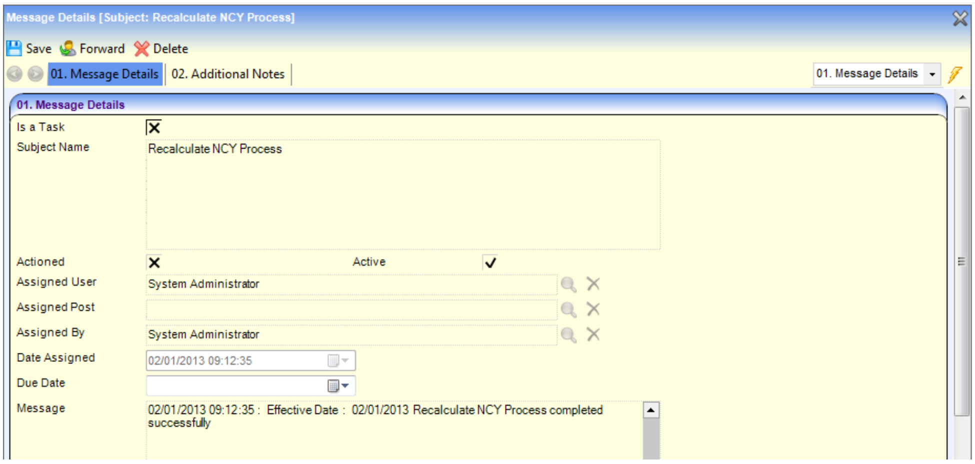
To rectify this issue, the functionality has been updated to utilise workflow messaging. When the process is started, by clicking the Recalculate NCY button, the following message displays:

> Recalculate NCY Process Initiated. Please check workflow messages for completion.

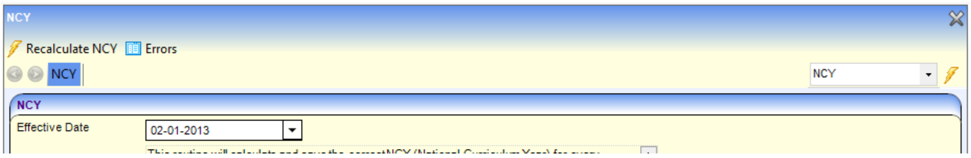
The user does not have to wait for the process to finish and can continue with other tasks. Once the process has completed, a workflow message is displayed on the **Home Page | My Workflow Messages** panel, of the user who started the process.



The user can open the workflow message and view the details if required.



If the **Recalculate NCY** routine could not process all student records, the user needs to navigate to the **NCY** screen, and then select the **Errors** button to view the records that were not processed.



KB400992

If the **Street** information for an address was edited, either within the v4 Client or v4 Online, One was incorrectly creating a new street record within the ADDR_DET database table.

A new address record is created where the user specifically states that they do not wish to update the existing address, but create a new address record.

KB401055

For Windows 7 users, where the resolution of the text was changed to 125%, the **Login** button did not display the **Login** dialog. This has been corrected and the Login dialog displays all buttons, whatever the text resolution.

KB401056

Where information for a site was updated within the v4 Client, One was not setting the **Last Updated By** and **Last Updated** values correctly. This has been corrected and One now records the correct values when a site record is maintained.

Common Basic Data Set (CBDS)

Introduction

The Department for Education's (DfE) Common Basic Data Set (CBDS) database provides a standard for data used in software systems for Management Information in schools, local authorities, other children's institutions, the Department and other Government bodies. This CBDS document is referenced in One to maintain the lookup values present across the modules.

Updates

In this release, we have updated the missing values in two lookup tables i.e. **Person's Ethnicity** and **Language Code** values.

Person's Ethnicity Code (0695)

Two missing codes are added to the One lookup tables.

DfE Code	DfE Description
WCOR	White-Cornish
ASRO	Sri Lankan Other

Language Code (0002)

One missing code is added to the One lookup tables.

DfE Code	DfE Description
SWE	Swedish

FSM Generic Import Changes (England Only)

In the One Autumn 2012 release, it was necessary to disable the generic import tool for importing FSM data. Changes were made to ensure the FSM information sourced within One matched new Department for Education (DfE) criteria, for the import and export of FSM data in CTF and School Census files.

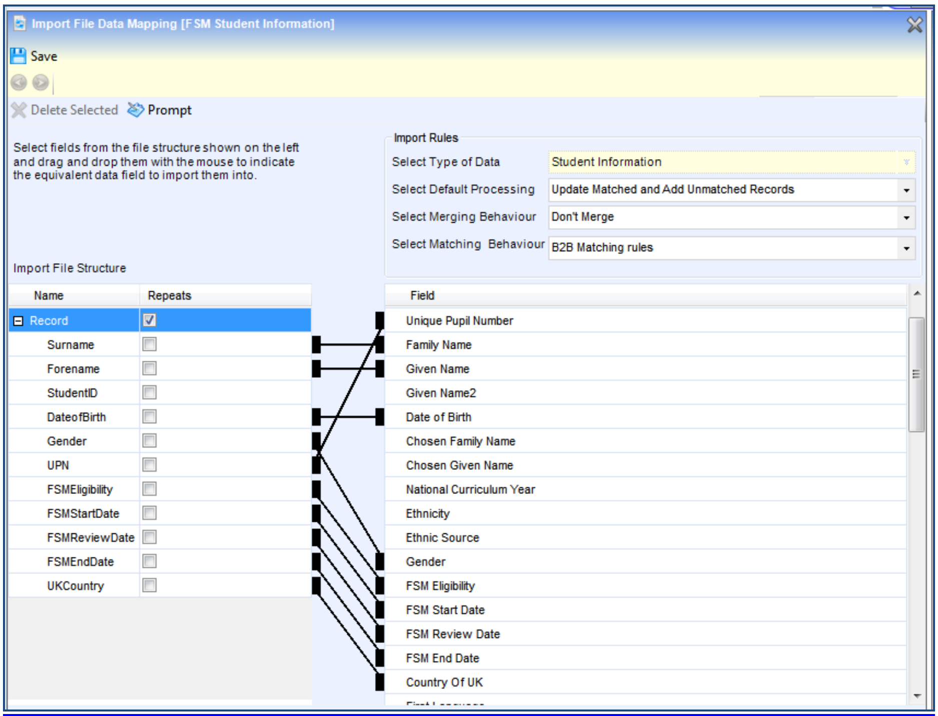
In this release, changes have been made to the generic **Import** routine to enable the import of the new FSM data items. The following data items are now supported via the generic import tool:

- FSM Eligibility
- FSM Start Date
- FSM End Date
- FSM Review Date
- Country Of UK.

FSM Import Data Mapping

The data items imported via the **Import** routine should be mapped to the FSM table (CPD_FSM_HIST) columns as shown in the screen below. You can create a new **Import File Specification** or modify any suitable existing file specification via **Focus| Data Management | Import| Import File Specification| Data Maps** (example mapping).

Data Fields	One Database Columns
FSM Start Date	CPD_FSM_HIST.CPD_FSM_START
Country Of UK	CPD_FSM_HIST.CPD_COUNTRY_UK
FSM End Date	CPD_FSM_HIST.CPD_FSM_END
FSM Review Date	CPD_FSM_HIST.CPD_FSM_REVIEW



FSM data items are imported in the above mapped fields if the following rules are satisfied:

- **FSM Status** value must be present and can be **True** or **False**.
- **FSM Start Date** must be present in the import file.
- **FSM Review Date**, if present, should be greater that the **FSM Start Date**.
- **FSM End Date**, if present, should be same or greater than **FSM Start Date**.
- **FSM Country of UK** field should be **ENG** (England), **NIR** (Northern Ireland), **SCT** (Scotland), or **WLS** (Wales).

Data Processing Business Rules

In line with the new data collection specifications, it is expected that Local Authorities will maintain only periods of eligibility, and any child without a current open eligibility record will be assumed to be no longer eligible. This removes the requirement to close a period of ineligibility (FSM Eligibility = F), and to open a period of eligibility (FSM Eligibility = T) and vice versa.

Only the latest FSM instance for each child in the import file is processed in One. On import the following set of validation rules are applied:

Validations that result in data being added to One

- If no **FSM History** is present in One, then the FSM instance present in the import file is imported.
- If **FSM History** is present in One, but does not match with the import file FSM data, and the incoming **FSM Start Date** is after the end date of the most recent record in One, then this inserts a new row after the last record present in One.
- If **FSM History** is present in One and the <FSMStartDate> and the <FSMEligiblity> of the incoming FSM record matches the **FSM Start Date** and **FSM Status** in One, then the **CPD_FSM_HIST** table is updated with the incoming FSM record values.

Validations that result in no data being imported in to One

- If **FSM History** is present in One and the <FSMStartDate> matches the **FSM Start Date** in One, but not the <FSMEligiblity>, then the incoming FSM record is not imported.
- If **FSM History** is present in One, but does not match with the import file FSM data, i.e. the incoming **FSM Start Date** record is greater than the **FSM Start Date** of the most recent **FSM History** record in One, then the FSM record is not imported.
- If **FSM History** is present in One, but does not match with the import file FSM data, i.e. the incoming **FSM Start Date** record is less than the **FSM Start Date** of the most recent **FSM History** record in One, then the FSM record is not imported.

System 3.49

Introduction

The System project has focussed on two main areas, where functionality previously available within One v3 was omitted or had not been migrated.

- Address Management – LLPG Migration
- Linked Files Online.

In addition to the above, the project has resolved a number of general system issues.

Linked Files

The Linked Files functionality within the v4 Online application has been updated so that it is more consistent with the v4 Client, in both the user interface and available functionality.

In the v4 Client, you are able to link a file and then choose if and when you want the linked file to be uploaded to the One database.

Prior to this release, when a file was linked in v4 Online, it was automatically uploaded to the One database. The main requirement for this release, for linked files in the v4 Online application, is to enable you to choose if and when you want to upload a linked file to the One database.

As well as functional changes there have also been some changes made to the user interface, so that the same options and labels are used in both v4 Client and v4 Online.

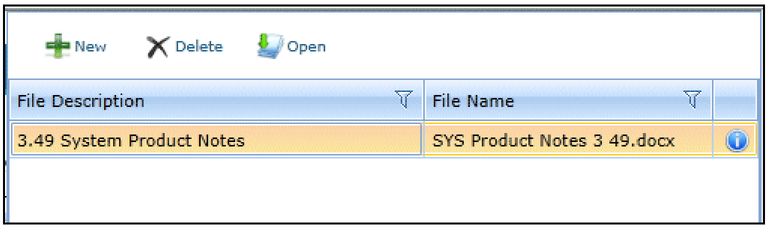
All the changes that have been made apply to the following module areas within v4 Online.

- A&T Back Office
- Bases
- CSS
- Governors

NOTE: The changes made to linked files within the online system will be included within Exclusions online in a future release.

User Interface Changes

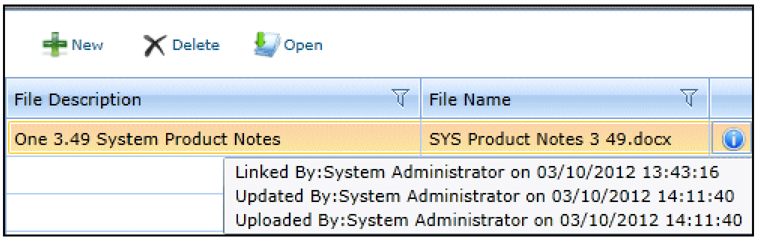
When the **Linked Documents** button is clicked, the command options available have been updated, so that they are consistent with the v4 Client.



- The **New** button is always enabled.
- The **Delete** button is enabled, when a listed linked file is selected.
- The **Open** button is enabled, when a listed linked file is selected.

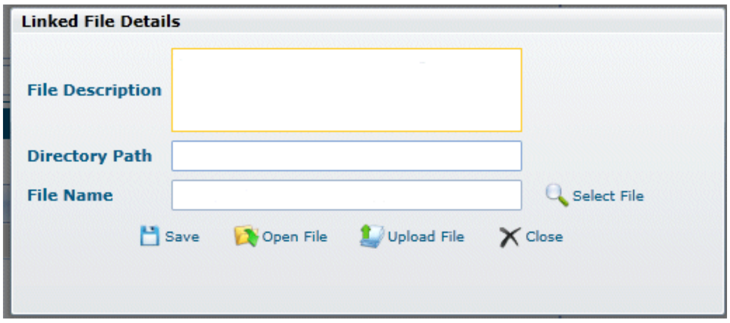
NOTE: All of the above options are subject to User Group Permissions.

Where a linked file is listed, hover over the **Information** button to view the details. This information has been updated, so that a **Time** and **Date** value is shown for all of the events.



Linked File Details Window

When you click the **New** or **Open** button from the **Linked Documents** window, the **Linked File Details** dialog is displayed.

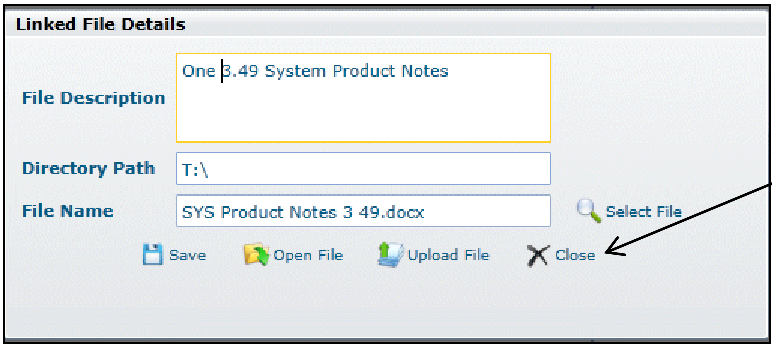


The following changes have been made to this dialog, to bring more consistency to the user interface between the v4 Client and the v4 Online application.

- **Linked File Details** – this was previously called **Title**.
- **File Description** – this was previously called **Description**, it is a mandatory field.
- **Directory Path** – this is a new label and data field, it is a mandatory field.
- **Select File** - this is a new button, browse to the document.
- **Open File** – this is a new button, you cannot open a file unless it has been uploaded.
- **Upload File** – this has moved from alongside **File Name**.
- **Close** – this is a dynamic command that is also displayed as **Cancel** based on the actions being performed.

Linking a New File

1. Click the **Linked Documents** button to open the **Linked Documents** window.
2. Click the **New** button to open the **Linked File Details** dialog.

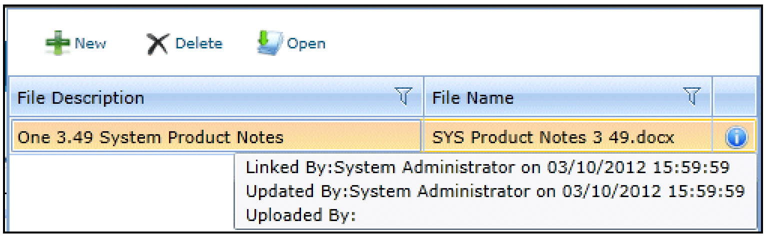


Displays as **Cancel** before a linked document is saved, or if any changes are made to the file and you do not want to save the changes.

3. Enter the **File Description** – this is a free text field.
4. Click the **Select File** button to open the browse to search for the required file.
5. Highlight the required file.
6. Copy the directory path from the browse onto the clipboard, as this is required in the **Linked File Details | Directory Path**.
7. Click the **Open** button on the browse window; this automatically populates the **File Name** field.
8. Paste the copied directory path into the **Directory Path** field.
   If you forget to copy the directory path, use either the **Select File** option again to locate the file path, or manually enter the information in the **Directory Path** field.
9. Click the **Save** button; if all mandatory information is present, the following message is displayed:

   Linked file saved.

10. Click the **OK** button on the message confirmation.
11. Click the **Cancel** or **Close** button to close the **Linked File Details** dialog and return to the **Linked Documents** window.
12. Hover over the **Information** icon to display details about who added the linked file and when it was updated, which now includes a time stamp as well as the date.



At this stage, the selected file has only been linked and you now have the option, as with v4 Client, of whether or not you wish to upload the linked file to the One database.

NOTE: Due to security limitations within the Silverlight application itself, which are outside of our control, it was not possible to automatically identify and store the **Directory Path** with no user interaction. We will, however, take a further look at this issue to see if there are any alternatives to managing the collection of the **Directory Path** for a future release.

Validation Rules

The **File Description** field is mandatory and if it has not been entered, the following warning message is displayed:

File Description is missing.

The **Directory Path** field is mandatory and if it has not been entered, the following warning message is displayed:

Directory Path is missing.

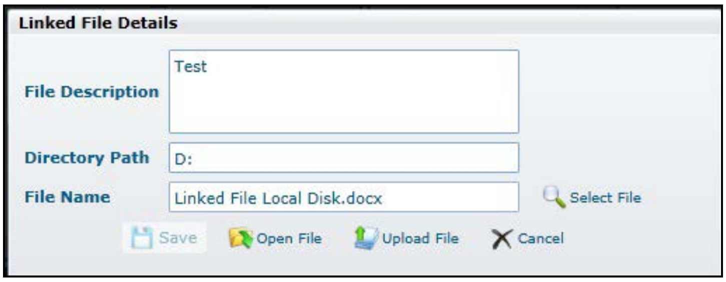
If both the file description and directory path are missing, the following warning message is displayed:

File Description and Directory Path are missing.

Uploading a Linked File

Once a file has been linked, you can upload it to the One database; it is no longer an automatic process.

1. From the **Linked Documents** window, highlight the required file and click the **Open** button to display the **Linked File Details** dialog.



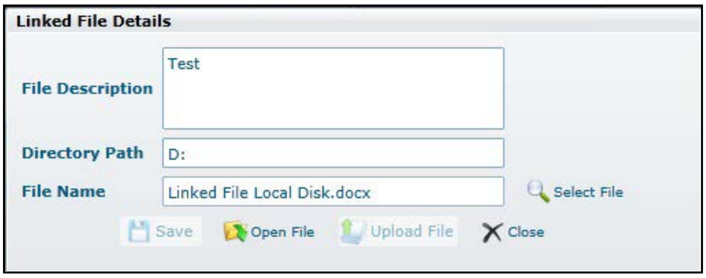
2. Click **Upload File** to open the browse window.
   The **Upload File** option is enabled if the selected linked file has never been uploaded; you can only upload a linked file once.

3. Navigate to and select the required file.
   The location of the file is displayed in the **Directory Path** field.

4. Click the **Open** button on the browse.

NOTE: Please ensure that the file you are uploading is not in use.

5. Click the **OK** button to close the message confirmation box and return to the **Linked File Details** dialog.

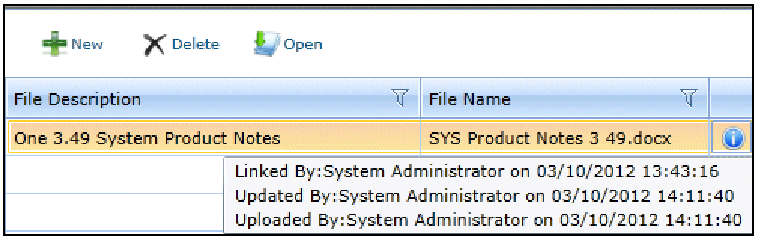


After the selected file has been uploaded, the **Upload File** option is no longer available, as a file can only be uploaded once.

NOTE: The **Save** button is enabled, if you edit either the file description or the directory path.

6. Click the **Close** button to return to the **Linked Files** window.

7. Hover over the **Information** icon in the **Linked Documents** window to view the upload details.
   When a linked file is uploaded, both the **Updated By** and **Uploaded By** fields are updated with information about the logged on user, date and time.



Upload Limits

Prior to this release, the v4 Online application had a maximum upload limit of 4GB. However, when testing the application based on this limit, we were unable to upload a file any larger than 15MB without the upload failing, either through performance or timeout issues.

As a result of this, the upload limit in this release is set to a default value of 15MB, which applies to the whole v4 Online application. This value is set in the Configuration Utility and can only be accessed by the System Administrator.

NOTE: Further investigations are being undertaken to overcome the current Silverlight limitations with a view to assessing the potential to increasing the upload limit in a future release.

If a selected file has a size of 0Kb, the upload cannot complete and a warning message is displayed:

The document that you are trying to upload is too small.

If a selected file has a size greater than 15MB, the upload cannot complete and a warning message is displayed:

The document that you are trying to upload is greater than the permitted size.

Updating Details of a Linked File

In the **Linked File Details** window you can update the **File Description** and **Directory Path**, whether the file has simply been linked or has also been uploaded. To update the details, complete the following procedure:

1. Make the necessary changes to the **File Description** or the **Directory Path**.
2. Click the **Save** button to display the following confirmation message:

   Linked File successfully updated.

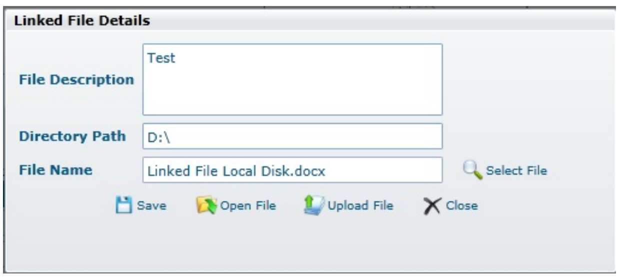
3. Click the **OK** button to close the information message box and return to the **Linked File Details** dialog.

   NOTE: The **Linked File Details** dialog remains available rather than returning to the main **Linked Documents** window, so that you can perform other actions such as editing the contents of a file or selecting an alternative file.

4. Click the **Close** button to return to the **Linked Documents** window.
5. Hover over the **Information** icon to view the update details.

Selecting an Alternative File - Linked File

To select an alternative file that has been linked, but not uploaded:



1. Click the **Select File** button to open the browse window.
2. Navigate to and select an alternative file.
3. Update the **File Description** field.
4. Update the **Directory Path** field.

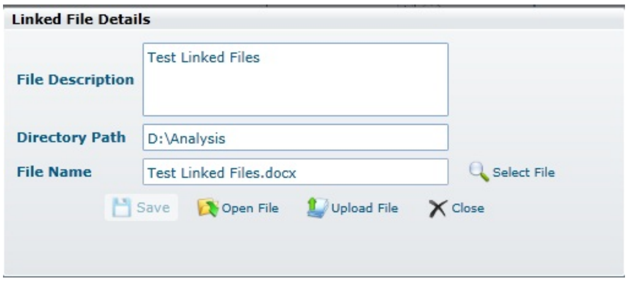
NOTE: One does not automatically identify and update the directory path details.

5. Click the **Save** button to display the following message:

   Linked File successfully updated.

NOTE: The **Save** button is enabled any time the **File Description** or **Directory Path** fields are updated

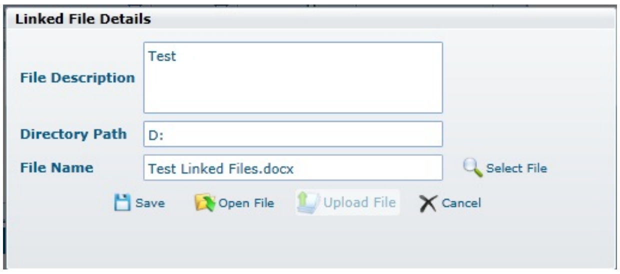
6. Click the **OK** button to close the information message box and return to the **Linked File Details** dialog, which displays the alternative file in the **File Name** field.



7. Click the **Close** button to return to the **Linked Files** window.
8. Hover over the **Information** icon to view the updated details.

Selecting an Alternative File - Uploaded File

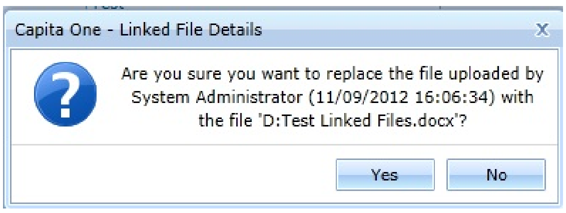
To select a file that has been linked and uploaded, but has been updated:



1. Click the **Select File** button to open the browse window.
2. Navigate to and select the updated file.
3. Update the **File Description** and **Directory Path** fields, as required.

NOTE: One does not automatically identify and update the **Directory Path** details; you must copy the directory path information to your clipboard, and paste it into the **Directory Path** field of the **Linked File Details** window.

4. Click the **Save** button to display the Linked File Details dialog.



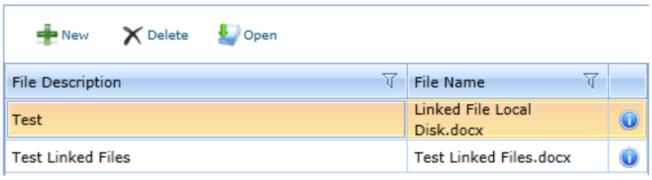
5. If you are sure you want to update the document, click the **Yes** button to display the following message:

   File successfully updated.

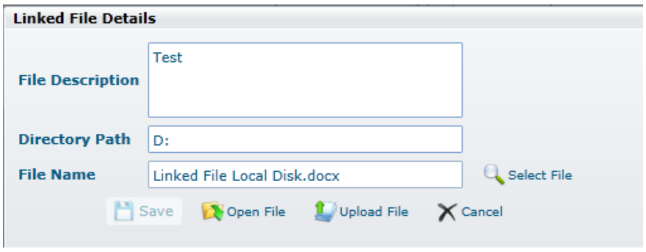
6. Click the **OK** button to close the information message box and return to the **Linked File Details** dialog, which displays the updated file in the **File Name** field.
7. Click the **Close** button to return to the **Linked Files** window.

Editing Contents of a Linked File

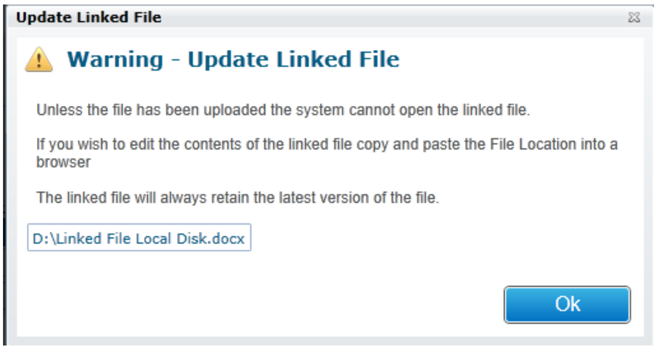
1. Click the **Linked Documents** button to open the **Linked Documents** window.
2. Highlight the required linked file from the list.



3. Click the **Open** button, the **Linked File Details** dialog is displayed.



4. Click the **Open File** button to display a warning message.



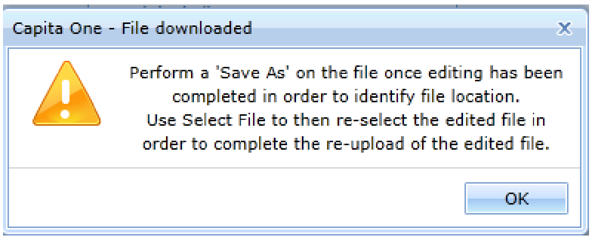
As noted on the warning message, if you wish to update the contents of a linked file, which has not been uploaded, you need to browse to the location of the required file, open the file and make any amendments as required. After it has been saved the latest version of the file will be retained in the linked file.

NOTE: The above restriction is as a result of security limitations within the Silverlight application, which we have no control over and have had to work around, to deliver the required functionality. We are looking to move to Silverlight 5 in a future release, which may provide us with more flexibility, so that we can manage the above scenario more efficiently.

Editing Contents of an Uploaded Linked File

If a file that has been uploaded needs to be updated:

1. Click the **Open** button on the **Linked File Details** dialog to display the **File downloaded** dialog.



   The selected file is automatically downloaded to a temporary file location (this is the same behavior as v4 Client).

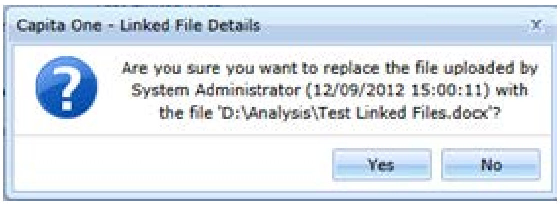
2. Click the **OK** button to close the warning message. The selected file opens in its native program e.g. Word, Excel etc.

NOTE: In some instances a blank Internet Explorer window may be displayed with prompts displayed. Select the appropriate prompt to open the selected file.
You may also need to adjust the browser settings, as described in *Linked* File Browser Settings on page *9*.

3. Make the required amendments, save the file via **File | Save As** (the location of the saved file is not important at this stage).
   After the file has been updated and the details saved, you are returned to the **Linked File Details** dialog.

NOTE: One does not automatically identify and update the **Directory Path** details; you must copy the directory path information to your clipboard, and paste it into the **Directory Path** field of the **Linked File Details** window.

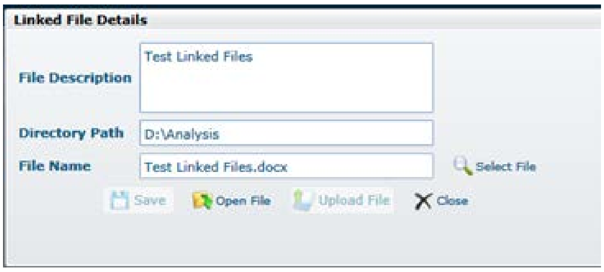
4. Click the **Select File** button to open the browse.
5. Navigate to and select the updated file from the saved location.
6. Click the **Open** button on the browse to return to the **Linked File Details** dialog.
7. Click the **Save** button to display the **Linked File Details** dialog.



8. If you are sure you want to update the document, click the **Yes** button to display the following message:

   File successfully updated.

9. Click the **OK** button to close the information message box and return to the **Linked File Details** dialog, which displays the updated file in the **File Name** field.



10. Click the **Close** button to return to the **Linked Documents** window.

Deleting a Linked File

There have been no changes made to the delete function within linked files online.

Linked File Permissions

There have been no changes made to permissions, which can be applied to linked files within v4 Online. All permission levels are applied in the normal manner and apply to both v4 Client and v4 Online.

The following permissions need to be set in v4 client via **Tools | Permissions | User Group Processes | User Group Processes Editor | Main Business Process – Administration | Linked Documents**:

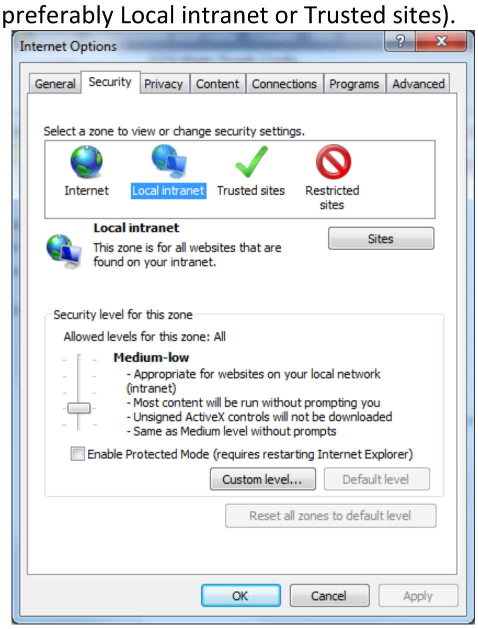
- Deny
- Read
- Read-Write-Delete

NOTE: There is no distinct permission level which can be set, which will allow/deny a user the ability to upload file. However, this is something we will be looking at in a future release.

Linked File Browser Settings

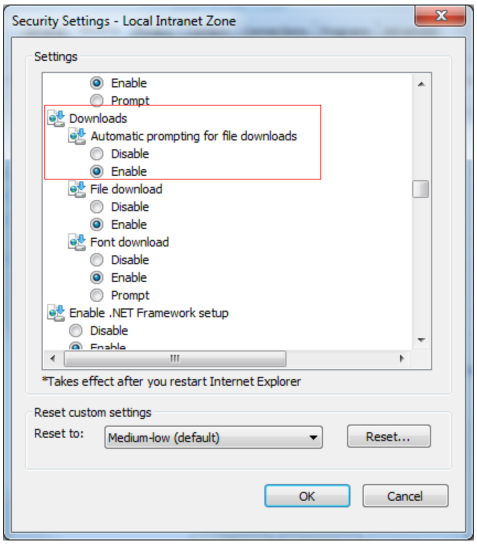
If a linked document does not open in an **Internet Explorer** browser, you may need to adjust your settings.

1. Open **Internet Explorer**.
2. Go to **Tools | Internet Options**.
3. Click on the **Security** tab.
4. Select an internet zone (preferably Local intranet or Trusted sites).



5. Click on the **Custom level** button.

6. Scroll to the **Downloads** section.
7. For the **Automatic Prompting for File Downloads** option, select the **Enable** radio button.



8. Click the **OK** button to return to the **Internet Options** window.
9. Click the **OK** button to close the **Internet Options** window.

Address Management – LLPG Migration

Overview

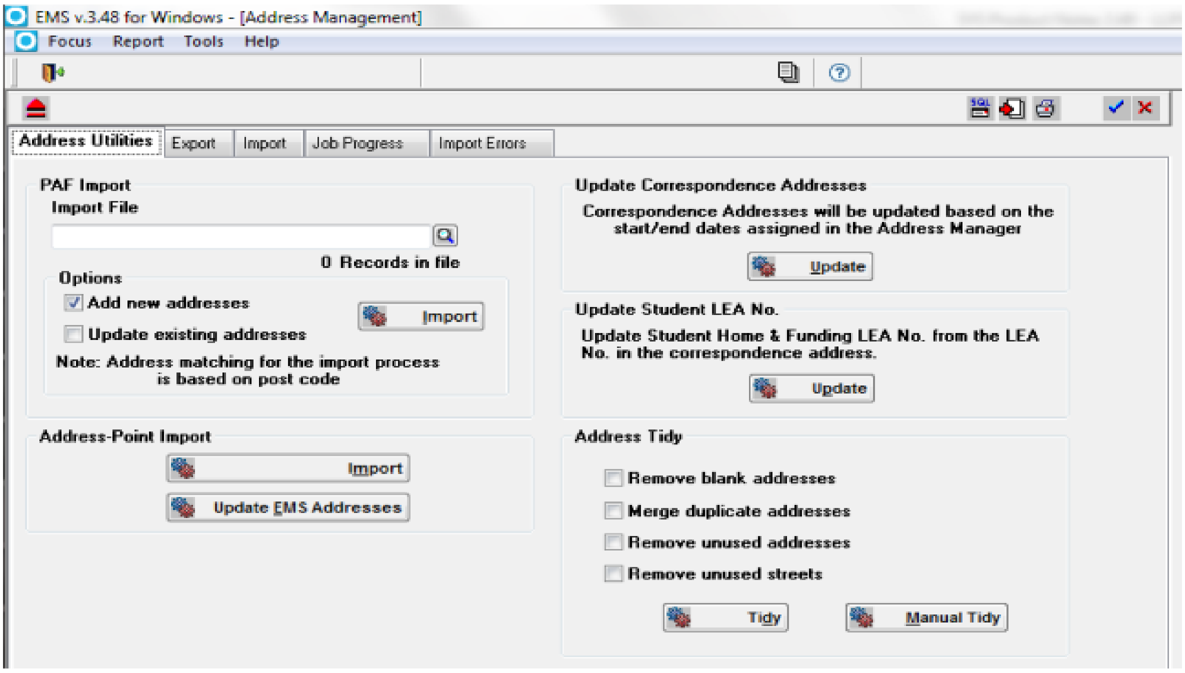
The Local Land & Property Gazetteer (LLPG) import and processing routine has been migrated from One v3 to v4 Online.

The migration has been improved to add flexibility to the routine and processes in a way that provides more information to users, specifically, the number of records processed and where any errors have occurred.

Previously, users were advised to run the import process only when they had exclusive use of One. This is no longer required, however it is recommended that the process is undertaken at a time when the One application is subject to minimal usage.

We also recommend the Bulk Match or Updated Addresses routines are run when the application is subject to minimal usage to ensure addresses are correctly updated.

NOTE: After upgrading to 3.49, the **Local Land & Property Gazetteer** section will no longer be available within One v3 via **Module Launcher | Tools | Address Management | Address Utilities**.



Navigation

The LLPG import routine is now available in the following route within v4 Online:

Home Page | Administration | Address Management | Address Utilities | Import Addresses

NOTE: Address Management in v4 Online can be accessed from the v4 Client via **Tools | Administration | Address Management** (subject to permissions). When the **Address Management** link is selected, v4 Online displays the **Address Management | Address Utilities | Import Addresses** screen.

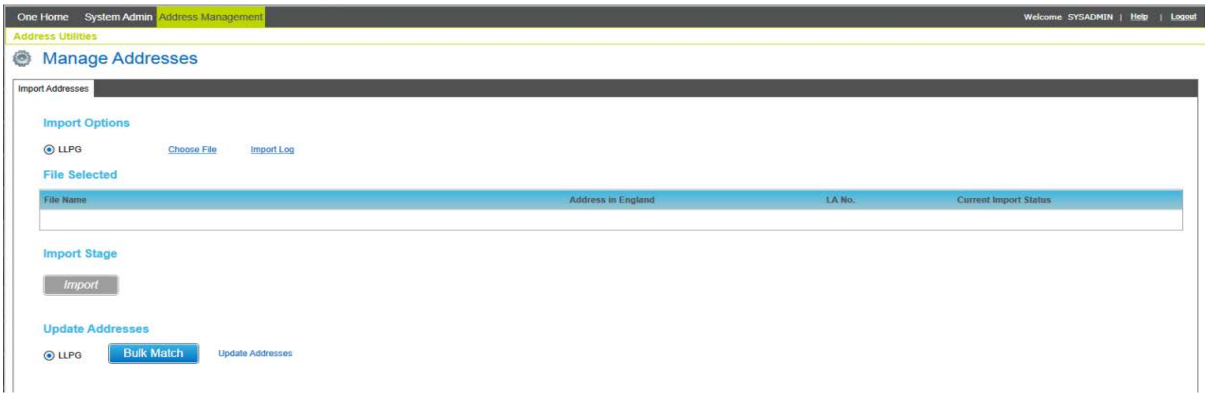
Import Addresses

This tab has four sections:

- **Import Options** – Enables you to select the address import type (currently only LLPG via v4 Online). Click the **Choose File** link to select a file for import or click the **Import Log** link to view the import log.
- **File Selected** – The list is blank until you import a file. After importing files, One will display the last imported file with the values selected and the **Current Import Status** column populated.
- **Import Stage** – The **Import** button is disabled until a file has been selected. When importing a file, the **Import** button is replaced with a grid with an **Import Status** and a **Date & Time** column to ensure the user is constantly updated with the current progress of the import/processing routine.

  When there is an import/update address routine in progress, the screen refreshes every 15 seconds to ensure the current status is displayed in the **Import Stage** grid.
- **Update Addresses** – An option is displayed to select the address data type to be processed along with the **Bulk Match** button as this is normally the main task undertaken and an **Update Addresses** link.

NOTE: In the One 3.49 release, you can only process LLPG data via v4 Online.



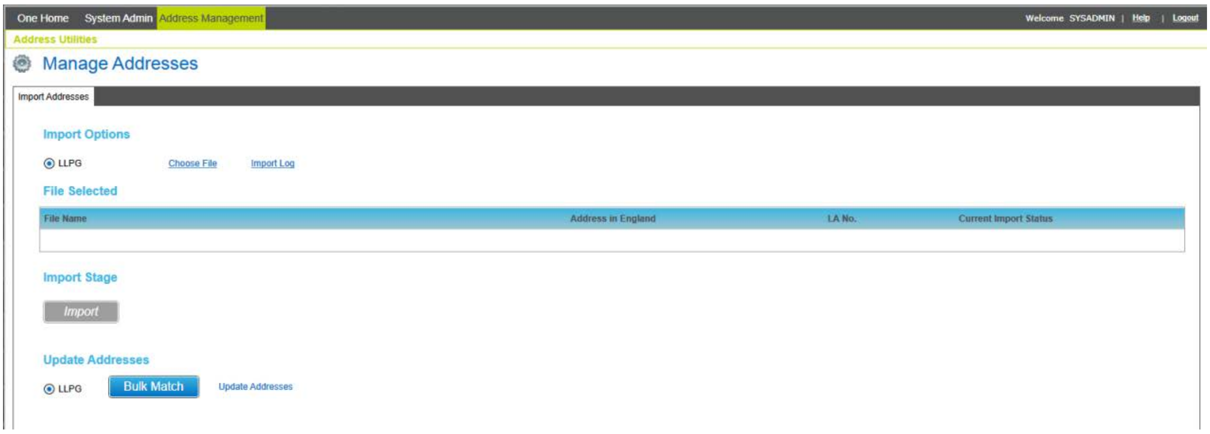
Permissions

By default, System Administrators can access the v4 Online **Import Addresses** area. To enable non-system administrators access to the **Import Addresses** area, grant them **Read-Write** permission to the **Import Addresses** business process, found under the new **Address Management** main business process.

Where access is set as **Deny** and the user has access to other functions under **Sys Admin** they can still access the **Administration** option but the **Address Management** primary navigation option and the menu option in the v4 Client are not displayed.

LLPG import and processing routine

When accessing the **Address Utilities** page for the first time after upgrading to 3.49, no file information is displayed on the **Import Addresses** tab.



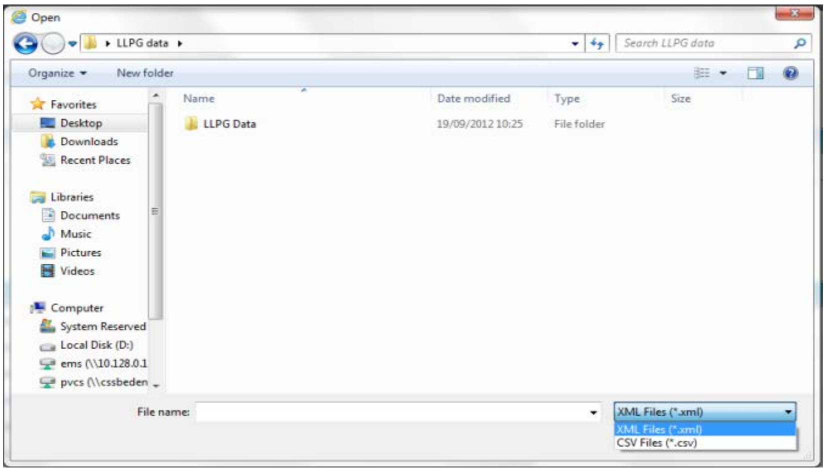
New database tables have been created to log the status for the importing and processing of a LLPG files. This enables a history to be built up of what files were imported, by whom and whether any of the update addresses routines were processed.

NOTE: Where no files have been processed within v4 Online the update addresses routines can still be processed. For more information, please see *Update Addresses Routines* on page *16*.

To import an LLPG file, complete the following procedure:

1. Click the **Choose File** button to display **Open** dialog.

   By default, it will filter only on XML files but you can select CSV to display Comma Separate Value files.



2. Select your file then click the **Open** button to return to the **Import Address** tab. The following information is displayed in the **File Selected** list:

   - **File Name** - Name of the file selected.
   - **Address In England** – Default value based on locale of the system.
   - **LA No.** – Set as the default LA No. of the system.
   - **Current Import Status** – Not Imported.

   The **Address In England** flag defaults to true (selected) where the locale of the system is 1. If any other locale value is set, the **Address in England** flag is set to false (not selected). The **LA No.** value is set as the default LA No. of the system and can be manually change if required.

3. Click the **Import** button to upload the file to the One database. The time to upload dependents on the size of the file being imported.

Once uploaded, the **Status** becomes **Queue for imported**. You can navigate away from the **Import Addresses** tab after the file has been uploaded and One will process and log the importing and processing of the LLPG data.

The **Update Addresses** section is hidden to ensure the data is fully processed before any update address routines are processed. The data is fully processed when the **Current Import Status** is **Imported**.

Once the import has been initiated, import statuses are provided within the **Import Stage** section. The following table lists **Import Status** values and their meaning.

NOTE: You might not see each **Import Status** message for each import.

Import Status Displayed	Meaning	Current Import status displayed
Queued for Import	The file has successfully been uploaded to the One database and is queued for the integration service to start the import process.	Queued for Import
LLPG Import Failed	The import has failed, this could be a result of the integration service not running and therefore the import has timed out, e.g. queued for more than 30 minutes. To display a tool tip detailing the reason for the failure, hover over the error status with your cursor.	Failed
Importing Local Land & Property Gazetteer Files	LLPG import process has started.	Importing
Loading LLPG Dictionary onto database		
Processing CSV LLPG file Processing XML LLPG file	CSV / XML LLPG data is being imported to the individual LPG DB tables.	
Error creating street record (XX) where ‘XX’ is the USRN reference for the record that failed.	There is an issue with the street, BLPU or LPI record that has prevented it from being imported. To display a tool tip detailing the reason for the failure, hover over the error status with your cursor.	
Error creating BLPU record (XX) where ‘XX’ is the UPRN reference for the record that failed.		
Error creating LPI record (XX) where ‘XX’ is the UPRN reference for the record that failed.		
Import failed, too many invalid records exist.	If an LLPG file contains more than 30 errors, One will not import the file.	Failed
Imported ‘X’ street records, where ‘X’ is the number of records created.	The LLPG import routine created ‘X’ number of records in the LPG_STREET DB table.	Importing
Imported ‘X’ BLPU records, where ‘X’ is the number of records created.	The LLPG Import routine created ‘X’ number of records in the LPG_BLPU DB table.	
Imported ‘X’ LPI records, where ‘X’ is the number of records created.	The LLPG Import routine created ‘X’ number of records in the LPG_LPI DB table.	
Started LLPG Upload	The processing of the imported data to the LPG_GEO DB table has started.	
Removing Duplicates	The upload process ensures no duplicate addresses exist from the import.	
Updating Properties	Creating new records in the LPG_GEO table from the imported address data.	

Updating BLPU records Updating LPI records Updating Street records	Updating any matched existing records in the LPG_GEO DB table.	Importing
Added ‘X’ new LLPG addresses, where ‘X’ is the number of addresses created.	The number of newly created addresses in the LPG_GEO DB table.	Importing
Updated ‘X’ LLPG addresses, where ‘X’ is the number of addresses updated.	The number of updated addresses in the LPG_GEO DB table.	
Load Complete	The importing and processing of the LLPG data to the LPG DB tables is complete.	
Indexing LLPG Dictionary	Creating indexes of street information for quick address searching when geo-coding addresses in One v3.	
Indexing complete	Indexing has finished.	
Removing redundant dictionary entries	Where indexed records exist more than 10,000 times, these are deleted because it does not improve address search speed.	
Warning: Import has ‘X’ invalid record(s), where ‘X’ is the number of errors incurred, this will not be displayed as no error(s) occurred.	Where 30 or less errors occur, One will carry on processing the file and at the end of the import a summary of the number of errors incurred is displayed.	
LLPG import completed	The end to end processing of the LLPG file has completed.	Imported

If you decide not to import the selected file and you have not started the import process, click the **Address Utilities** page link to reload the **Import Addresses** tab. The last file that was imported is displayed.

NOTE: Ensure any LLPG CSV files imported are encoded as UTF8 to ensure One can correctly process any special characters within the file, e.g. accented characters Ŵ or è.

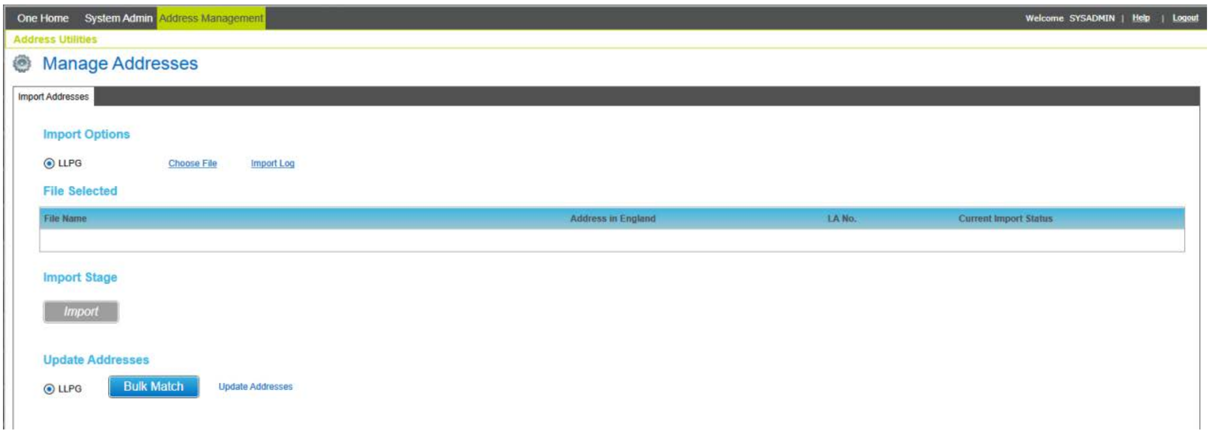
Key Import Improvements

Below is a list of the key improvements made to the LLPG import process that provides greater flexibility and enables users to perform further tasks elsewhere within One:

- The latest Data Transfer File (DTF) version of the LLPG file supported is CSV 7.3.3.1 and XML 7.4, which has not yet been officially released.
- When importing an LLPG file, One does not restrict the user from navigating elsewhere within v4 Online to perform further tasks.
- Improved error logging. Where a record has failed, the respective address reference is provided (UPRN or USRN) to enable the record to be corrected and the file re-imported.
- The import and processing of LLPG data no longer stops where a single error has occurred. If more than 30 errors are logged for a file, the import will fail at this point as the data integrity of the file needs to be corrected.
- Improved status logging of LLPG file import progress. More information is provided regarding the current stage of the process and the number of records imported, processed and updated.
- Provision of an LLPG import log to view information on files imported previously and what, if any, update address routines were processed.

Update Addresses Routines

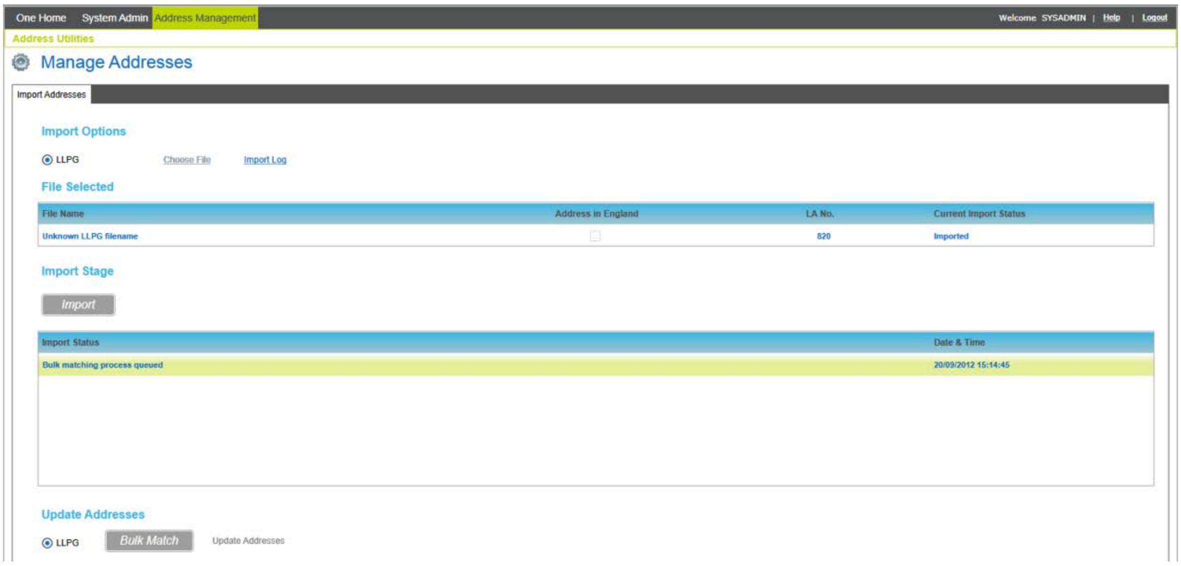
After upgrading to 3.49, users will no longer have the LLPG import process available within One v3 and the **Import Addresses** tab will be displayed as below:



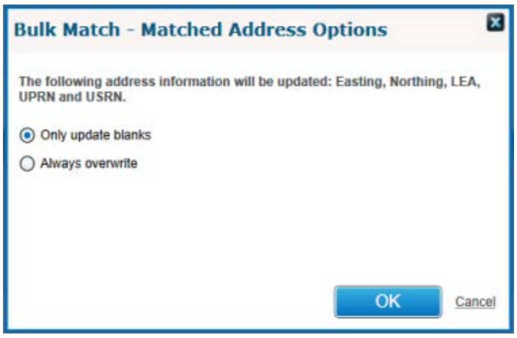
Due to the updated routine logging information in new database tables, the Bulk Match and Update Addresses routines can still be processed, but because a physical file is not imported through the v4 Online application, a dummy record is created.

The dummy record created by the Bulk Match and Update Addresses routines contains the following information:

- **File Name** – Unknown LLPG Filename
- **Address In England** – Set to false, the value cannot be ascertained at this point because the file has not been imported.
- **LA no.** – Defaults to the LA No. of the system.
- **Current Import Status** – Imported.



Click the **Bulk Match** button to display the **Bulk Match – Matched Address Options** dialog or click the **Update Addresses** link to display the **Update Address – Matched Address** dialog.



The options displayed are equivalent to those in One v3:

- **Only update blanks** updates the stated fields where they are not populated (NULL) for matched addresses.
- **Always Overwrite** updates the stated fields even if a value already exists.

NOTE: Where the last LLPG import has failed, if the Update Address or Bulk Match routine is processed, One will log the process against the failed import record. The reason for this is that there will still be address data within the LPG_GEO database table from the last successful LLPG import.

The **Current Import Status** in the **Selected File** grid does not relate to any of the Updated Addresses routines and therefore will remain as **Failed** or **Imported**.

While a routine is being processed, both options are disabled until the process has completed or, should an error occur, the routine has failed.

The Bulk Match and Update Addresses routines remain unchanged from One v3 to v4 and the table below identifies the statuses that are displayed in the Import Stage grid when a routine has been initiated.

Import Status	Meaning
Bulk matching process queued Update Address process queued	The routine and option has been selected ready for the integration service to start the routine.
Bulk matching process failed Update Address process failed	An issue has occurred causing the process to fail. It could be the network is down or One cannot communicate with the database or integration service. To display a tool tip detailing the reason for the failure, hover over the error status with your cursor.
Bulk matching started Update address started	The routine has been started by the integration service and is currently being processed.
Updating ONE addresses from LLPG data	The Update Addresses routine was selected and One is matching addresses for geo-codes to be updated and new addresses created.
Bulk matching ONE addresses from LLPG data	The Bulk Match routine was selected and One is matching addresses for geo-codes to be updated.
Update address completed – updated 'X' records	The process has completed and successfully updated/created X number of addresses.
Bulk Matching completed – matched 'X' records	The process has completed successfully and updated X number of addresses.

If either process has been queued, One will fail the routine if it is not started within 30 minutes. The process could fail due to connectivity issues on the network or where one or more of the services has failed.

If the routine fails you should check with the System Administrator to ensure all services are running correctly before starting the routine again.

Students

Free School Eligibility

The changes made to FSM functionality within this release are for locale 1 only and are used across the B2B, CTF, ATF and AP census modules.

Last year, the DfE made changes to the collection of Free School Meal (FSM) eligibility information. There were no user interface or database changes made, as information required by the DfE was already available in One. Within this release however, changes have been made to streamline FSM information sourced from One. It is expected that the following changes will provide the required functionality to record the appropriate level of FSM information, enabling LAs to provide accurate FSM data to schools and the DfE.

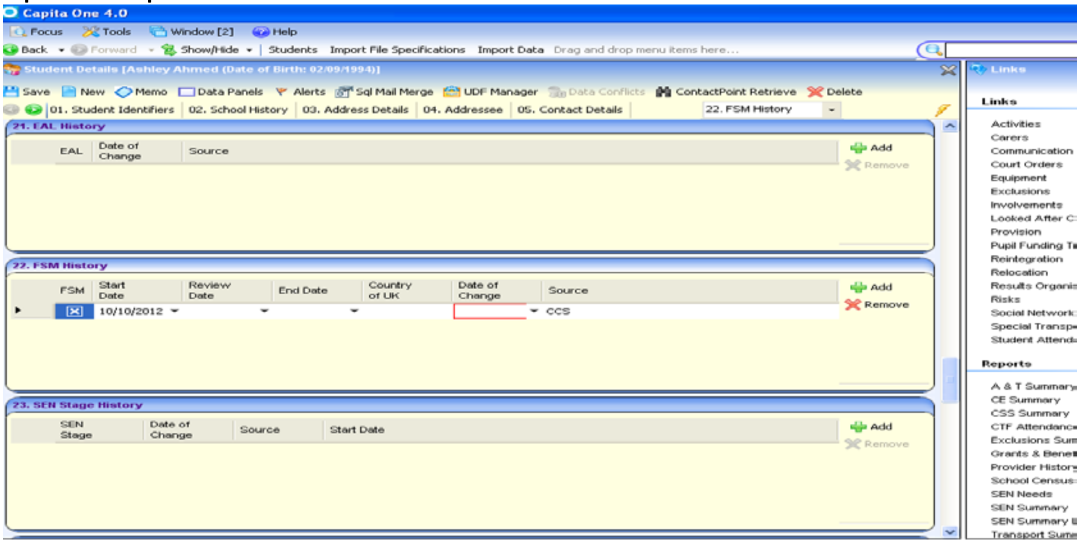
Along with the **FSM Start Date**, **FSM End Date** and **FSM Review Date**, this year the DfE has introduced UK Country to data collections within the FSM instance container, as an optional data item. This data item identifies the **Country of United Kingdom** in which the establishment providing free school meals is located. The country of UK is an optional data item, as it is not required or transferred by other UK countries. Local Authorities are reminded that for Pupil Premium Payments, only those pupils with a free school meal entitlement, recorded in England will be eligible for these payments.

User Interface and Database Changes

FSM information can be recorded in two areas:

- v3 Grants and Benefits module as claim records (CLAIMS table).
  No changes have been made to FSM functionality within the Grants and Benefits module.
- v4 core Student record in the **FSM History** panel, against the FSM history records (CPD_FSM_HIST). Previously the **FSM History** panel recorded FSM flag status, date of change and source. This has now been extended to record:
  - **FSM flag status**
  - **Start Date**
  - **Review Date**
  - **End Date**
  - **Country of UK**
  - **Date of Change**
  - **Source**

The v4 user interface has been modified to record this information on the student core record via **Focus | People | Students | Student Details**.



The following new fields have been added to the CPD_FSM_HIST table which is mapped to the v4 user interface (UI) fields:

V4 fields on UI	Table column	Data Format
Start Date	CPD_FSM_START	DATE
Review Date	CPD_FSM_REVIEW	DATE
End Date	CPD_FSM_END	DATE
Country of UK	CPD_COUNTRY_UK	VARCHAR 2(3)

UK Country is a new lookup table. Possible values for this field are defined by the DfE; these are seeded values in the One database.

Code	Description
ENG	England
NIR	Northern Ireland
SCT	Scotland
WLS	Wales

V3 FSM History Browse

The v3 **FSM Browse** panel which displays FSM history records has been updated to display changes made in v4. This panel is available via **CTF | Focus |Student | Common Basic Dataset | FSM Eligibility | FSM History**.

The new **FSM Start Date**, **End Date**, **Review Date** and **Country of UK** fields are displayed and the panel is made read-only by removing the **Add**, **View/Edit** and **Delete** buttons.

FSM history records against the student record can only be added in v4.

Historic Free School Meal Data

Existing FSM history records will be updated as part of the One 3.49 release, to bring them in line with the new FSM functionality. Historic FSM records will be updated as follows:

1. One will sort all FSM records for a student in ascending order based on the **Date of Change** field.
2. One will set the new **Start Date** field to the same value as the **Date of Change** field.
3. Where multiple FSM records exist, each record for which there is a second record with a more recent Collection Date, the first record will have an End Date set to the day before the next record's Date of Change field. For example, if Record A has a Collection Date of 20/09/2012 and Record B has a Collection Date of 15/10/12, when upgraded, Record A will have an End Date of 14/10/12 added (Record B's Collection Date minus one day).
    - No **End Date** will be set for the FSM record with the greatest date of change; this record will be left open.
    - If there is only one historical FSM record for a student the **End Date** field will be left blank.
4. The **Review Date** field will be left blank, but you can enter a date. DfE regulations expect there to be a review date for all currently open entitlement records, i.e. all records where the FSM flag status is set to True and the **End Date** field is null or in the future.
5. The **Country of UK** field will be left blank, but it is possible to edit this field.
6. The FSM status flag will remain unchanged.

Note: LAs are requested to amend these values to actual dates if known.

Data Processing Rules

New FSM history records can be created in the **Student | FSM History** panel directly, or by changing the **FSM Eligibility** flag on the **Supporting Details** panel and clicking the **Save** button. Adding a FSM record from either of these areas will automatically add a record in the **FSM History** panel with a **Start Date** that equals the current system date. The **Start Date** is a mandatory field, but it can be amended.

The FSM flag is automatically set to False.

- If the FSM record is added using the **Add** button in the **FSM History** panel; the FSM flag status can be amended by the user.
- If the FSM record is added by changing the FSM eligibility flag on the **Supporting Details** panel, the FSM flag is set according the new status.

The FSM **Review Date** field is set to null by default, but can be added by the user, this value must be more than the **Start Date** field.

By default the **End Date** of new records is also set to null, but this can also be edited by the user. The **End Date** must be more than or equal to the **Start Date**.

If FSM history records are added in One after 1st January 2013, the **Country of UK** field is auto populated based on the locale, this value can be edited by the user. The **Country of UK** value is optional.

If a new FSM history record is created and an existing record which has no **End Date** or has an **End Date** which is >= the new record's **Start Date**, then the **End Date** of the existing record is defaults to the **Start Date** of the new record – 1 day.

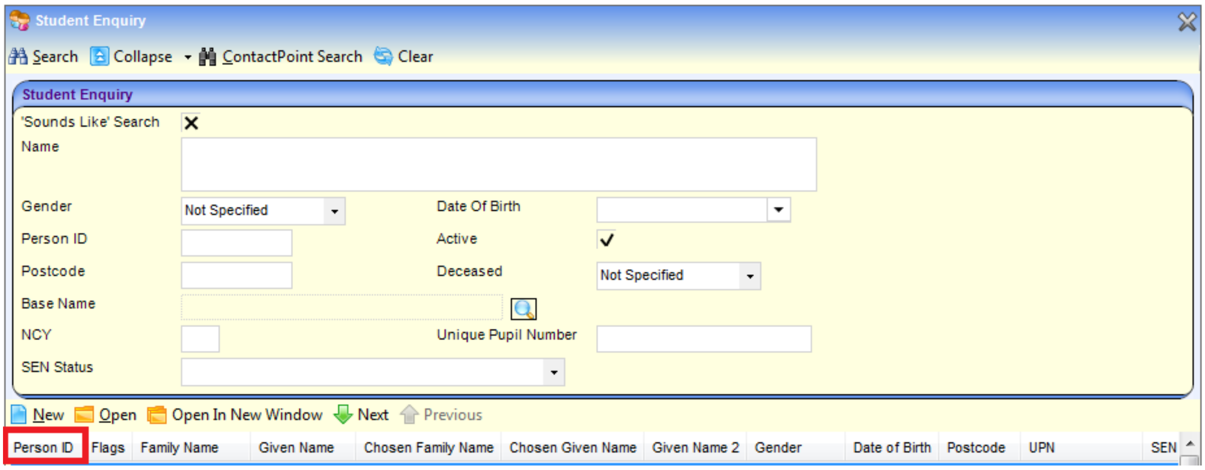
It is not possible to add multiple FSM records for a student with overlapping start and end dates. If a future FSM record already exists, One will not allow a new FSM record to be added.

The **FSM Eligibility** flag will display the FSM status of the FSM history record with the latest **Start Date**. This flag is not dynamically updated for future start or end dates and is not altered by any changes in the Grants and Benefit module.

BTA Improvements

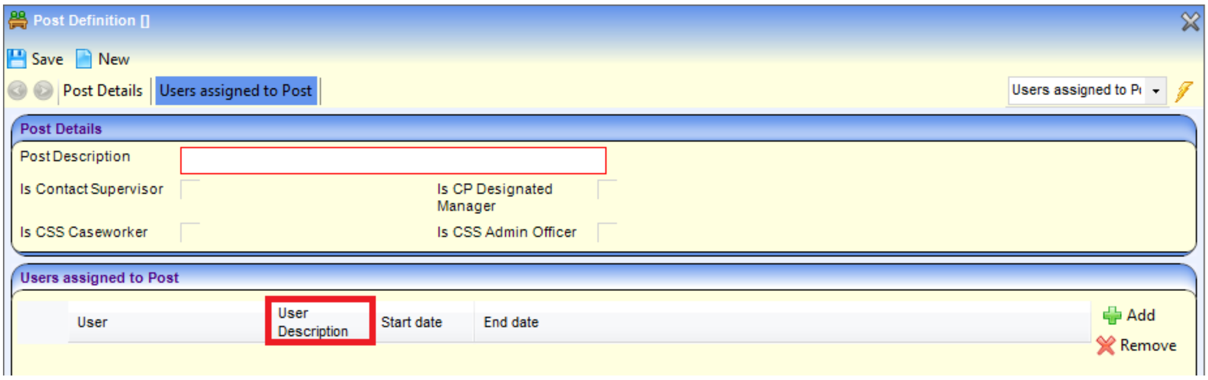
Student ID displayed in Student Enquiry results

One 3.49 now displays the student ID field in the **Student Enquiry** results. The ID is the first field of the search result grid and is labelled **Person ID**.



User Description column added to the Post Definition screen

One 3.49 now displays the **User Description** column in the **Users assigned to Post** panel in the **Post Definition** screen. This enables users to view to whom the **User** field relates.



The **User Description** field is populated with the value in the **Description** field associated with the **User Name** selected from the **User Browser** dialog.

Resolved Defects

KB119217

For Crystal Reports in One 3.49, the user can decide whether to display the **Description** alone or to display **Value + Description** for all the report parameters.

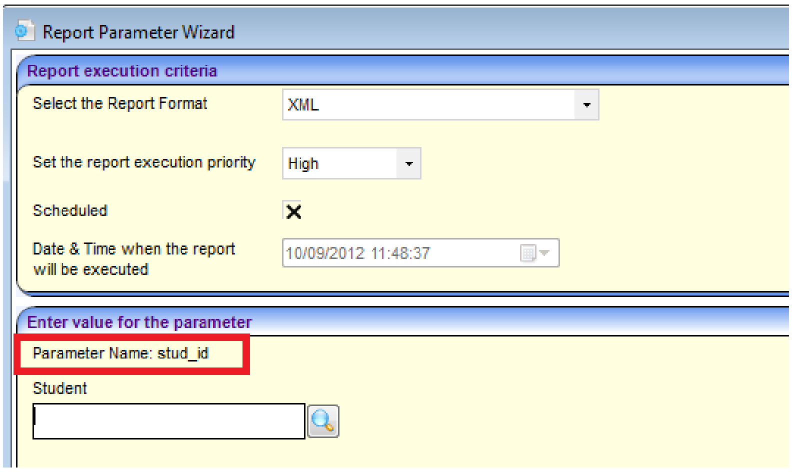
If the **Prompt with description Only** parameter option in Crystal Reports is set to True, then while running the report the user will only see the **Description** value of the parameter. If the option is set as False, then while running the report the user will see both the **Parameter** and **Description** values.

KB119023

One 3.49 now correctly logs a message in the eventlog.txt file if the database is unavailable or down while the integration services are running. After the error is logged, the integration service is shut down. The user must manually restart the integration services once the database is available to restart any incomplete job.

KB119445

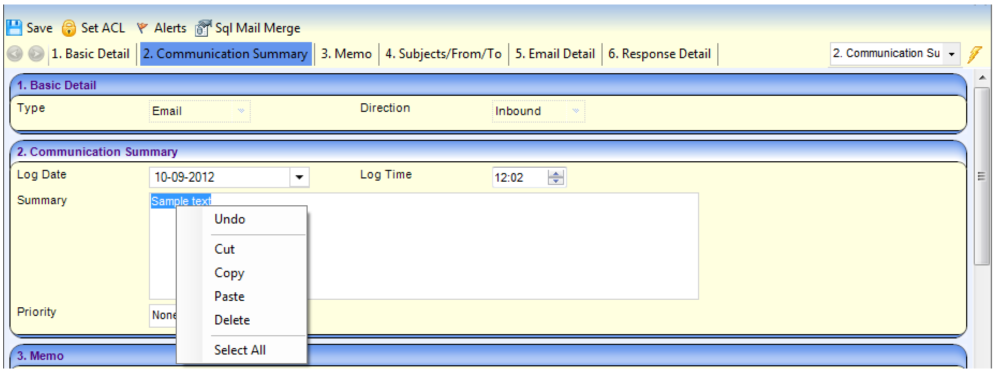
One 3.49 now provides the user with database column IDs along with report parameter labels.



The user is now provided with details of the database Column ID to correctly identify the parameter value that is expected by the report.

KB119334

The **Summary** field of in the **Communication Summary** log supports cut, copy, paste and delete; accessible via the right-click pop-up menu.

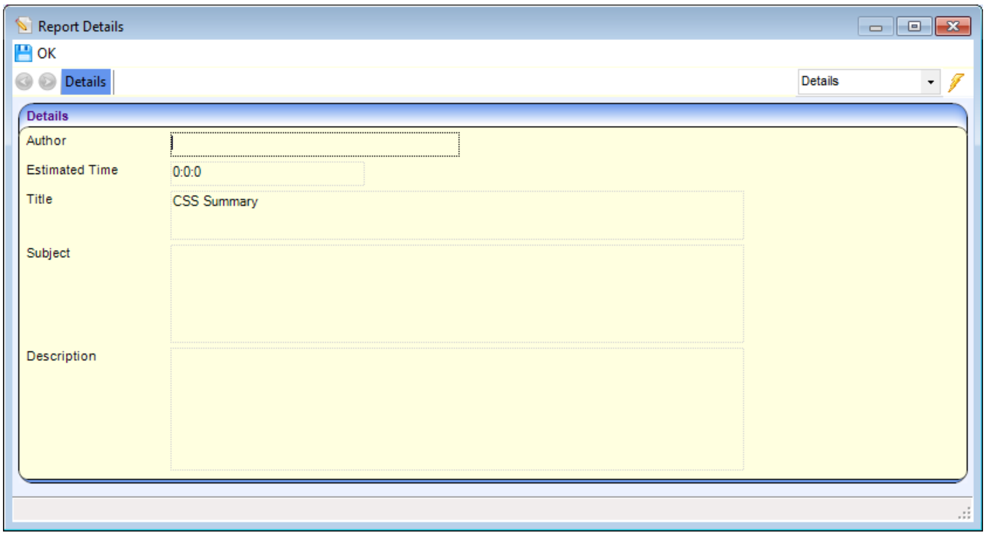


KB118669

The user can now add multiple bases with the same base name but with an exclusive combination of 'LA number + School Number' or 'LA number + URN'. If the user tries to add/update a base with a combination of 'LA number + School Number' or 'LA number + URN' that is already available in the system, an error message is displayed.

KB98023

The reports available in Report Definition Repository within One 3.49 are now provided with a **View Report Details** button that opens the **Report Details** dialog, which displays additional information about the selected report.



The following details are available:

- **Author** - Populated from the Crystal Report **Author** field.
- **Estimated Time** - This value populated from an XML file created when the report runs. Before running the report for the first time, **Estimated Time** will be empty. On subsequent viewings, the field will be populated from the time created.
- **Title** - Populated from the Crystal Report **Title** field. If the **Title** field in Crystal Report is empty, then this field will display the filename of the report without the extension i.e. for report6.rpt title will be report6.
- **Subject** - Populated from the Crystal Report **Subject** field.
- **Description** - Populated from the Crystal Report **Comments** field.

KB118980

Users can now search for **Student**, **Person**, **ICS Person** and **Student Attendance** with the **Date of Birth** parameter value alone or with a combination of **Date of Birth** parameter value with other available search parameters.

KB118945

One now retains the sort order set by the user for the **My Completed Reports** section of the **My Home Page** within the current session, even if the user navigates to other windows in the application. The sort order set by the user will be retained when the user returns to the **My Completed Reports** section.

KB116997

The **End date** in the **Student School History Details** window now works correctly, and the user can save a school history record with valid data.

KB117825

The people merge function in One V3 now works correctly and does not display an error.

KB117296

The **Save Data with Report** flag is no longer selected for Crystal Reports after running the report in One 3.49. This prevents data being attached to the report before the next run and thus avoids incorrect information being displayed to the user in the reports.

KB117345 /KB118162
One no longer displays an error message while adding a communication log to a student record to be kept after merging with a student record set to be merged.

KB117566
When the field type of parameters in linked reports are not matched by the parameter field current values, One now displays the following message:

> Report parameter values exist that are not provided by the client please enter parameters values manually.

After closing the message window, the **Provide Parameter values** modal window is displayed, listing the parameters that One could not populate.

KB117765
One now has the ability to favour **View** in **Student Data Panel** permissions for a user that belongs to multiple user groups.

If a user is a member of multiple user groups that have conflicting **Hide/View** permissions for certain **Student Data** panels but at least one of the user groups has **View** permissions, then One will display the panel to the user.

KB116708
The **Gender** field available in Person and ICS Person modules is populated automatically based on the value selected for the **Title** field.

If a **Gender** value is associated with a **Title** while defining a title in the **Title** lookup, then after selecting the **Title** in Person and ICS Person the **Gender** will be populated automatically with the associated value defined in the **Title** lookup. The user can manually override the default **Gender** by selecting a different value from the list.

KB117345
One no longer displays an error message while adding a communication log to a student record to be kept after merging with a student record set to be merged. Communication logs can be added to the **Person/Student to keep** after merging student/ person records.

KB96517
The **SEN Professional** panel in Involvements for a student is correctly updated with the person record when a person with the **Social Services Officer** role is linked to the student.

KB89380
The **Estimated Due Date** field in the **Date of Birth Details** panel in the Person module is now provided with a date validation that prevents a date that is earlier than 01/01/1900 being entered.

KB98453
A user with Read permission for the **Student Looked After Details** business process will no longer be able to remove the **Looked After Childs** record from student details.

KB96082
Lookup codes set as **Inactive** in the **Lookups** window are no longer available in the lookup fields within the application. Only **Active** codes will be available for the user within One 3.49.

KB87768
Carer records can now be removed from an inactive student record.

KB86772
The **Address Line** parameter in the **Advanced Person Search** window enables the user to search on one-line addresses linked to the person. For example, an advanced person search with the **Address Line** parameter entered as ‘23 Scott Street, Bedford, PH12AB’ will now return a record.

KB114739
The Set Address routine available in the **Carer Details** window now copies the **End Date** of the previous correspondence address and a **Start Date** to the new correspondence address of the target entity i.e. Carer, Student and All dependents from the source entity i.e. Student, Carer.

When copying the **End date** and **Start Date** fields the following rules are applied:

1. If the current correspondence address of the source entity has an **End Date** and the target entity has the same current correspondence address, when the Set Address routine is run, the source entity's **End Date** is copied to the target entity's **End Date**.
2. If the new correspondence address of the source entity has a **Start Date** then running the Set Address routine copies the source entity's **Start Date** to the corresponding field in the target entity.

KB114830

One 3.49 will retain the report parameters entered by the user while running the same report consecutively. If the user runs a second report in between, then the report parameters set for the first report will be lost and the parameters of the second report will be retained.

The user should be aware of the following two constraints that impact this feature:

1. For reports that have person/base parameters, the respective Id (Person Id/Base Id) will be retained instead of person name/base name.
2. For reports with parameters that are list-view, the check state (True/False) of discrete list items will be remembered. However, for custom list items, only the checked (True) custom list items will be remembered and unchecked custom list items will not be remembered.

KB116778

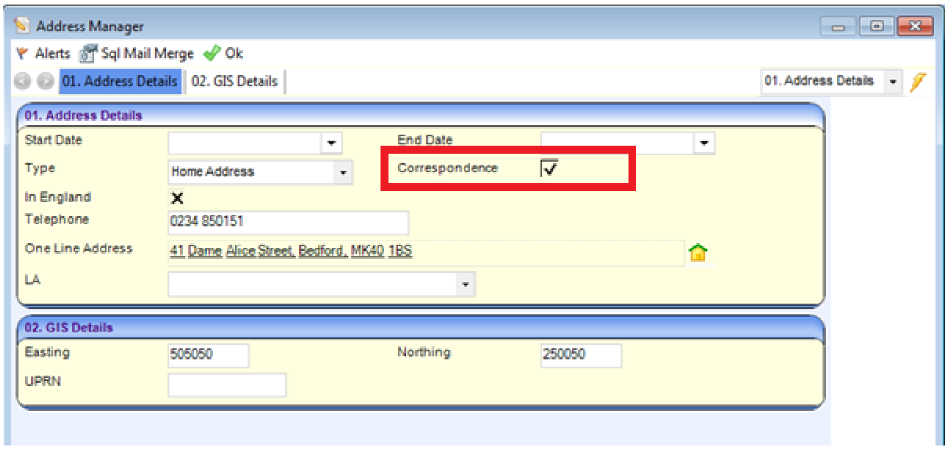
The social network diagram for **Other Contacts** now correctly display the person details in **Current View** if there are two records present in the **Other Contacts** section for the same person, one record has an **End Date** and the other record is active i.e. without an **End Date**.

KB83301

Address details updated in ClientSettings.ini file are now visible in the **My Homepage** section for the user.

KB106750

The **Correspondence** check box available in **Address Manager** dialog is now editable and the changes made are recorded into the address records.



KB101419

The user can now successfully remove an invalid **UPN** from the **UPN History** of a student and save the student record with the changes.

KB110989

The changes made to the **Telephone** value of the current correspondence address for a student is now saved successfully, even if the same address appears more than once in the student's address history.

KB108279

The Summary of Exclusions including Student Details report can now be successfully run without getting the following error:

> The field name is not Known.

KB101477

Improved One's handling of reports with unmatched parameters. For more information, please refer to KB117566.

KB106743

One 3.49 correctly returns all the matched results for student search with a **Postcode** provided in the search criteria.

KB86927

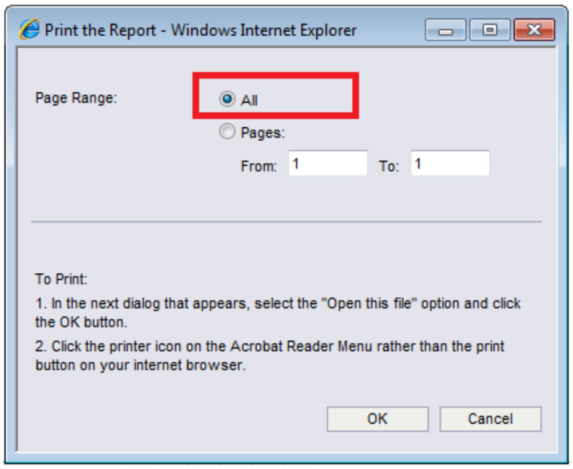
Person enquiry in Carers now correctly acknowledges the NCY filters that are set using the v3 Client. Any person with an NCY equal to or below the NCY filter value is not included in person enquiry search results in One 3.49.

KB98265

Users can set an inactive student to active and to inactive again then save the new inactive status with a new **Inactive Reason** and **Date**.

KB116092

When printing from Crystal Reports, the default **Page Range** option is now **All**. This will help ensure that all the report pages are always printed by default.



Relationships Panel

Resolved Knowledge Base Issue

KB113755 – Checking Details of ICS Person and Adding New ICS Person in Relationships Panel

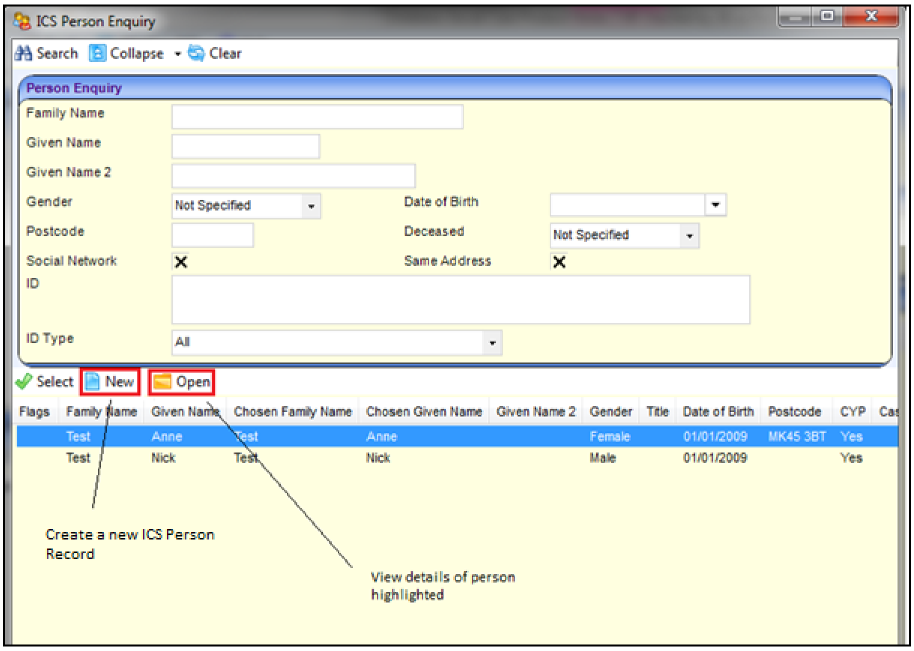
Prior to One 3.44, the Associations panel was available instead of the Relationships panel.

When adding an association, it was possible to look at the details of a person prior to adding them as an association, and if the required person was not available in the database it was possible to add a person.

This functionality has been introduced into the **Relationships** panel enabling users to confirm a person's details before adding the person to the **Relationships** panel, and enabling the user to create a new ICS person record.

Click the **New** button to create a new person record.

Click the **Open** button to view details of the highlighted person.



Support & Maintenance

KB102392

Manage RegBase Flags Routine Not Updating Dual Registered Students Correctly

In One v3 the **Manage RegBase Flag** routine did not take in to account students with dual registration. This has now been resolved.

The **Manage RegBase Flag** routine is accessed via **Tools | Data Management | Manage RegBase Flag**.

The routine will now update dual registration if a student has added another base as a dual registration.
For example, if Base A has a **Reg Type** of MN-D and the **Dual Registration** is set to True and Base B has a **Reg Type** of Dual and **Dual Registration** is set to False, once the **Manage RegBase Flag** routine has run, then Base A will remain static and Base B will have the **Dual Registration** set to True, if the Base B start date is set to the date the routine is due to run.

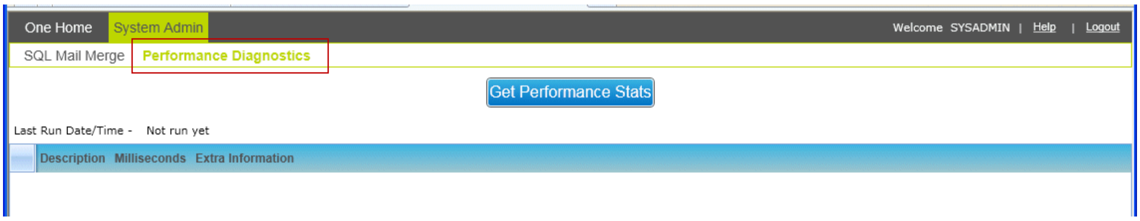
System 3.48

Performance Diagnostics

A new page has been added to the **System Administration** module to assist with performance diagnostics.

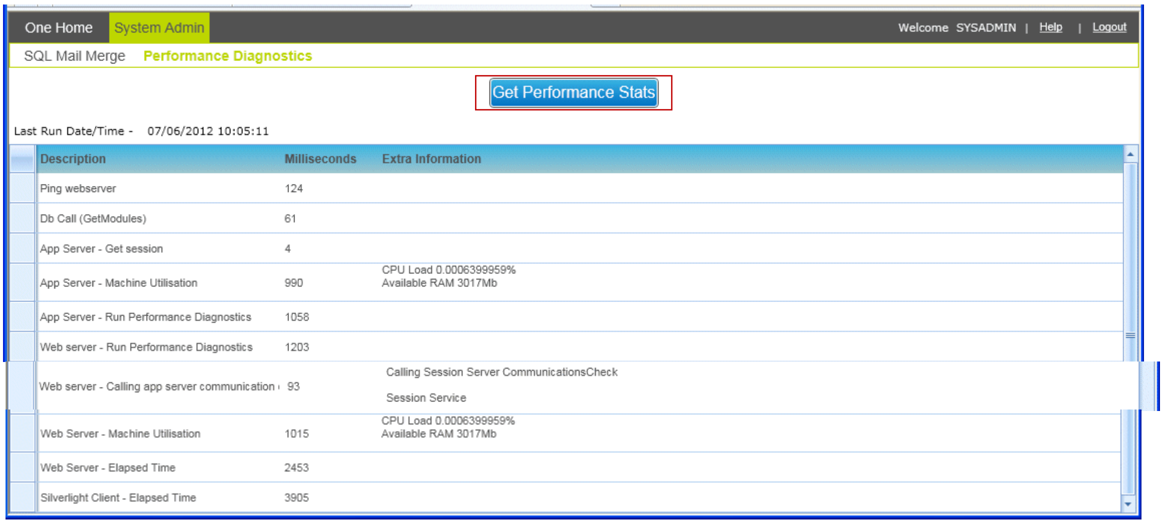
Overview

'**Performance Diagnostics**' can be accessed by clicking the '**Administration**' button on the Home page. This page is only available to users who have been defined as being **System Administrators**.



Usage

On the 'Performance Diagnostics' page, click on the '**Get Performance Stats**' button.



Results

The following table describes the expected results. '**Extra Information**', unless stated differently, will be empty unless there is an error with performing that step:

Description	Milliseconds	Extra Information
Ping Webserver	The time it took to send (and retrieve) 8 characters of data to the Web Server from the Silverlight client.	
Db Call (GetModules)	The time it took to call a stored procedure in the database from the application server.	
App Server-Get session	How long it took for the application server to validate the user's session with the session server.	
App Server-Machine Utilisation	The time taken to perform the machine resource check.	The current CPU usage and available free memory on the application server.
App Server-Run Performance Diagnostics	The time taken to do the db call, get session, and Machine Utilization checks.	
Web Server-Run Performance Diagnostics	The time taken for the App Server performance diagnostics. The difference between this time and the App Server-Run Performance Diagnostics will highlight the time taken by the network between Web Server and App Server.	
Web Server – Calling App Server communication check	Time taken to invoke the communication report.	Similar output to that retrieved when requesting a communication report from V4. A report detailing the status of the application server, session service, report server, map server, and Oracle client.
Web Server-Machine Utilisation	The time taken to perform the machine resource check.	The current CPU usage and available free memory on the Web Server.
Web Server-Elapsed Time	The time taken to perform the 'Run Performance Diagnostics', Communication check, and Machine utilization.	
Silverlight Client–Elapsed Time	The time for all the above, the difference between this time and the Web Server-Elapsed Time will highlight time taken by the network between client and Web Server.	

Part of the focus for the **One** 3.48 release was to consolidate omitted or non-migrated functionality for two system functions within the v4 Rich Client, these being storing ‘Linked Documents’ on a NAS and the ability to fully manage Addresses.

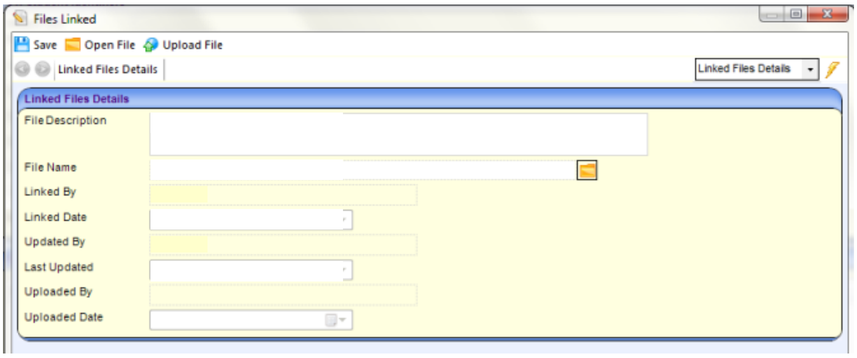
A number of System defects have been resolved, some of which are system functions and others that impact on the way the user interfaces with the system.

Linked Documents

The v4 Rich Client Functionality has been updated to be consistent with **One** v3 whilst including usability improvements.

Key Changes

A user can now create a linked document record which refers to a file stored on a NAS (Network Access Storage) or mapped network drive.



- A linked document record can be manually uploaded to the Database where required, via the new ‘Upload’ button.
  Note: Once a file has been uploaded it cannot be linked back to the network (consistent to v3 behaviour), to make this possible the linked document will need to be save externally the record deleted and recreated referring to where the file was saved externally.

Further information has been provided below on scenarios that may occur for Linked Documents and how the system has been designed to behave:

- Where a file has been uploaded, if the file is opened and changes made externally to **One** selecting ‘Save’ within the ‘Linked Files’ modal window will display a message prompt to the user. The user can select to overwrite the database file with the file from the user’s temporary directory or chose not to overwrite the file at all, but this will result in the updated file not being uploaded to the **One** database.
- The ‘File Name’ field value is only populated or updated when creating a Linked Document record or when a different file has been selected, for either network or uploaded Linked File records.
- Where ‘Save’ has been selected and no changes have been made a message ‘No changes have been identified’ will be displayed.
- Where a network Linked file record is opened where the network location cannot be found, the message ‘Cannot find the file ‘XX’’ will be displayed where ‘XX’ is the path\filename that cannot be found.

Address Manager

Prior to **One 3.48** managing address data was restricted to either **One** v3 or v4 Online A&T Back Office; for the **One** 3.48 release permitted users will now have the ability to manage addresses within the v4 Client.

Business Process Name Change

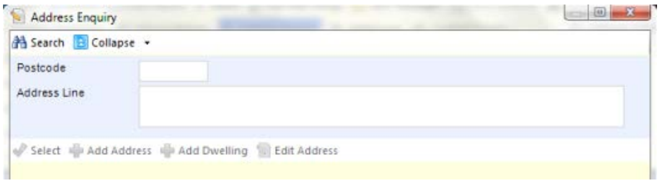
With regards to Address permissions there have been two Business Process name changes under the Main Process '**Addresses**'; this does not affect existing permissions. The change is to allow the same permissions to be used across v4 Client and v4 Online; below are the two changes:

- 'Save Address Online' has been updated to '**Save Address**'
- 'Save Address Geocode Online' has been updated to '**Save Address Geocode**'

New Address Manager Functionality

Three new buttons have been created within the 'Address Enquiry' window that will allow a permitted user to perform any of the three functions: 'Add Address', 'Add Dwelling' or 'Edit Address' to manage address information within the v4 Client, further information has been provide below on the new functions.
FIG 1 displays the updated modal window.

FIG 1

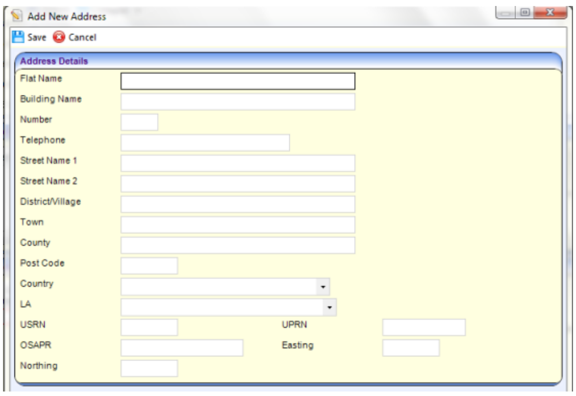


'Add Address' Button

The function provides the ability to **create** a completely new Address to the System, to enable the button certain permission is required *('Read-Write' on Business Process 'Save Address' under Main Process 'Addresses'*) but the user will need to process an initial Address search so duplication of addresses is avoided.

Selecting the '**Add Address'** button will display an '**Add New Address'** modal window (**FIG 2)** to enter the new address values and save the new Address record, saving the record will close the 'Add New Address' and return the user to the 'Address Enquiry', the system will automatically process an address search based on the postcode entered and highlight the newly created record.

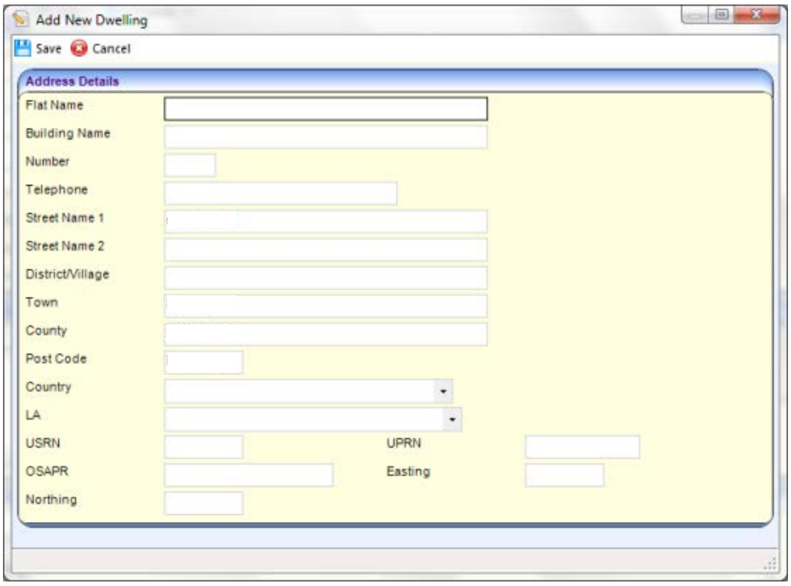
FIG 2



‘Add Dwelling’ Button

The button will only be enabled where an existing address has been highlighted within the ‘**Address Enquiry**’ window and allow for a new dwelling record to be created for an existing street record. Selecting the ‘**Add Dwelling**’ button will open an ‘**Add New Dwelling**’ modal window where the basic address details are prepopulated from the highlighted address (**FIG 3**); this allows new dwellings to be created on the fly, easily without the need to enter the full address details.

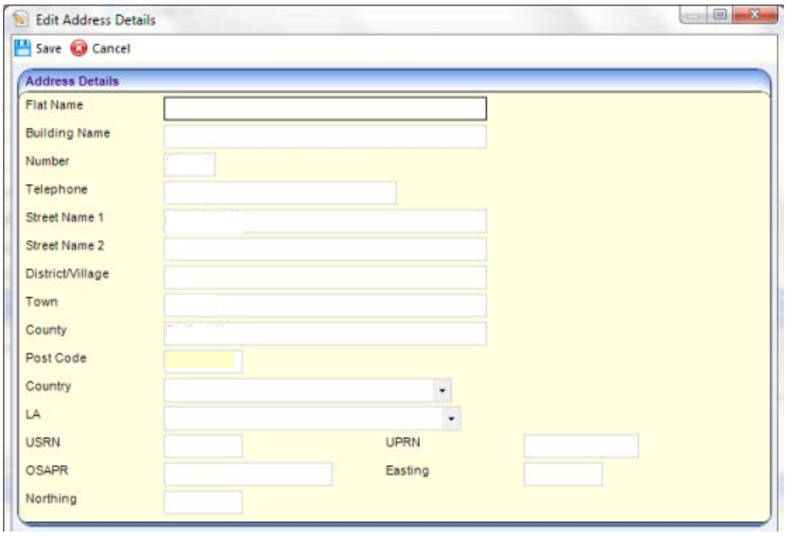
FIG 3



‘Edit Address’ Button

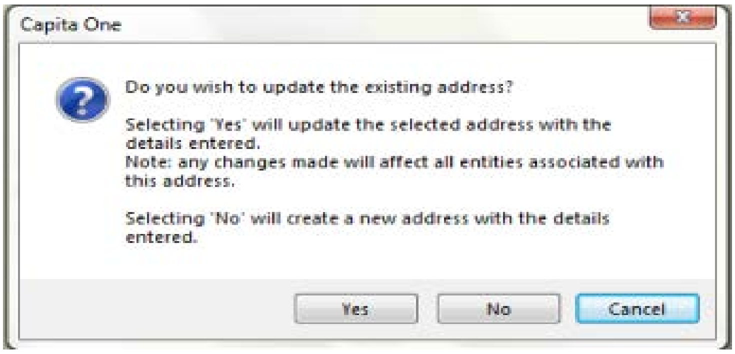
The ‘**Edit Address**’ button will only be enabled after highlighting an existing address record from within the ‘**Address Enquiry**’ screen. Upon selection an ‘**Edit Address Details**’ modal is displayed (**FIG 4**) with all fields populated with details of the selected Address record.

FIG 4



Selecting ‘Save’ for an edited Address will result in a message prompt to be displayed (**FIG 5**) with three options ‘Yes’, ‘No’ and ‘Cancel’ the message will ask if the existing address is only to be updated (‘Yes’ selected) or where there are exceptional cases a completely new address is required, this might be for a Child Minder, Base or Agency which requires its own unique address record (‘No’ selected). If the user is unsure how to proceed or does not wish to update the address at all the ‘Cancel’ option can be selected and this will return the user to the ‘Edit Address Details’ modal window.

FIG 5



Editing Geocode (Fields Easting & Northing)

Geocode information on Addresses is valuable and should not be casually updated because of use within distance calculations for Admission & Transfers or Transport Assessment. With this in mind, for a user to be have the ability to update the Geocode information, ‘Read-Write’ access will need to be granted to Business Process ‘**Save Address Geocode**’ under the main process ‘**Addresses**’.

Where ‘Edit’ is selected for a record displayed within panel ‘Address Details’ the ‘Address Manager’ modal window will be displayed, the house icon has now been enabled to allow the user to maintain the address selected where required but also select a different address whilst managing Geocode or other relevant information for the address record.

Customise Menu

KB109487

Prior to **One** 3.48 where the file menu had been customised, the system would only save the changes made if the user exited the client and started it again; the change/s are immediate when ‘**OK**’ is selected.

Note: If creating a new ‘Sub Menu’, for the system to save this correctly, there must be at least one child item assigned to the new sub menu for the system to create and rebuild the menu successfully.

Renaming the menu ‘Focus’ will create a new sub menu as this cannot be renamed.

Known Issues:

- Removing / Hiding menu items: the ‘Remove’ button is incorrectly enabled for System Focus menu routes, these cannot be removed or hidden from users; this is controlled by Permissions. The system should only allow user created ‘Sub Menus’ to be removed.
- Renaming System Focus routes: the system allows for the user to change the label for a System Focus menu route and once the change has been applied the system will actually create a new ‘Sub Menu’. The correct function is the system should only allow the labels to be updated for user created ‘Sub Menus’.

UDF Management – ‘Compile View’ Function

KB106152

When selecting ‘Compile View’ within UDF Management the system would provide inaccurate confirmation to state a view had been created to be used for reporting purposes when in fact the view had not been created. In 3.48 the system has been corrected to display the appropriate message to state whether the View has been created or not but also to correctly build the view where a successful message has been given.

School History

KB106516

The Registration Type on school history record is showing different values in v3 to v4.

When deleting a school history record within the V4 Rich Client where the ‘Registration Type’ is ‘DUAL’ resulted in inconsistent values being displayed between **One** v3 and v4. The inconsistency was due to an omitted function provided within **One** v3 where the user is prompted with a message ‘*The registration status for the main registered base will be updated from MN-D to MN-S*’.

Selecting ‘Yes’ to this message would complete the deletion of the school history record and correct the ‘Registration Type’ value of the main registered record whereas selecting ‘No’ would result in the record not being deleted and the user returned to the system.

In the 3.48 release the omitted function has been included within the V4 Rich Client resolving the inconsistent behaviour of system and data.

Crystal Parameter Fields

KB117566

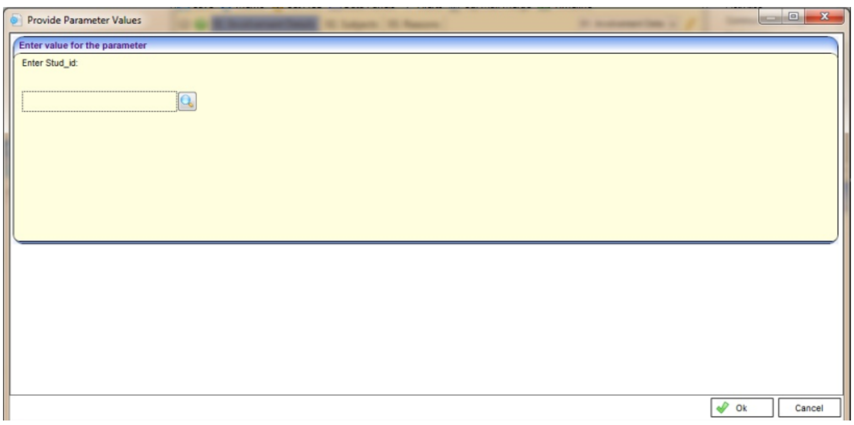
In release **One** 3.46 Crystal Report enhancements were introduced for a number of issues including ‘Linked Reports’. The impact of this is where a ‘Linked Report’ has a Parameter Name which does not match the parameters exchanged by the client and more than one parameter is exchanged error: ‘*The types of the parameter field and parameter field current values are not compatible field current values are not compatible*' would occur.

The v4 Rich Client cannot resolve the Parameter Names exchanged from the client to the report and this resulted in a generic error. From **One** 3.48 where the aforementioned scenario occurs the system will provide a warning message (**FIG 6**):

FIG 6

Selecting ‘**OK**’ to the message dialogue will open a ‘Provide Parameter Values’ modal window (**FIG 7**) to allow the parameter values to be entered manually. Once the values have been entered select ‘OK’ and the system will generate the Report.

FIG 7



To aid in the creation and maintenance of linked reports a document '**v4 Linked Reports User Guide**' has been created (on the DVD in the Documents | v4 Users folder) and can be reference for all parameters values exchanged by the client in certain focus routes but also contains more technical information to aid in the design of the reports.

Communication Log Filter defaults to 1 week.

Update to solution KB116833

In release 3.46 the Communication Log functionality was updated to allow Local Authorities to restrict the number of records retrieved, as the retrieval of a large number of entries in the Communication Log was causing performance issues in some LAs. This was achieved by implementing a new 'LA Default' value which can be set within One v3 Tools | System Administration | LA Defaults - 'CLOG_VWKS'.

Upon entering the 'Communication Log' screen the system will validate the Default 'CLOG_VWKS' and calculate the 'From Date' as (System Date - 'CLOG_VWKS') and the 'To Date' as the system date. Based on these values the appropriate Communication Log records will be retrieved from the database.

The new default option created has an initial default value of '1' but LAs can change this value if the initial number of weeks is not sufficient.

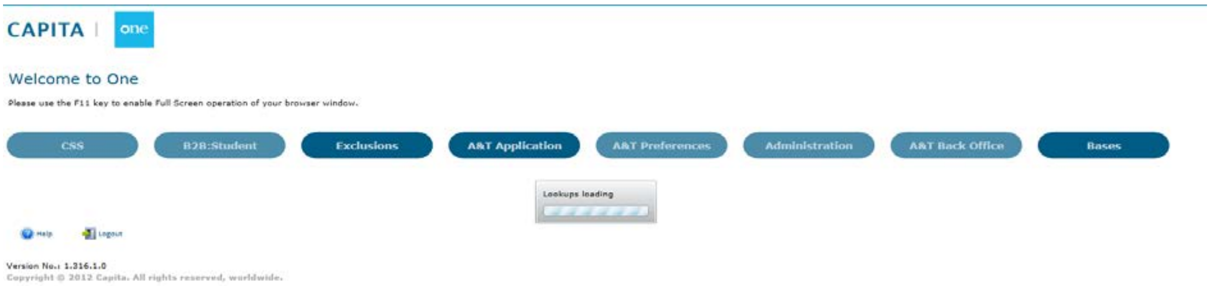
The information regarding this change was omitted from the 3.46 Product Notes and we apologise for any inconvenience this might have caused.

One Online V4 - Login Screen Performance

Prior to release **One** 3.48 it was noted the system took some time for the v4 One Online login screen to be loaded and displayed, the reason being the way in which the system loaded the lookups.

For the **One** 3.48 release the code has been reviewed and performance improved to reduce the time taken to load and display the **One** Online v4 Login page. Once the user has logged in if the system has not loaded all of the required lookups then certain lozenges will be disabled with a 'Lookups Loading' process dialog displayed, at the point where the lookups are loaded the process dialog will close and the lozenges will be enabled allowing the user to access the required area of the system as displayed in (**FIG 8**).

FIG 8



Resolved Defects

KB113485
Where the 'Password' value is updated for a user account the system was not consistently prompting for the user to change their password upon their first login after the change.

The above issue has been resolved in the **One** 3.48 release and the System Administrator will now be prompted with a message dialog 'Do you want this user to be forced to change their password next time they log on?', select 'Yes' will result in the user being prompted to change their password and 'No' will have the opposing effect.

The message dialog is not displayed for newly created users as the system prompts for a password change upon login as default, but only where the password has been 'Reset' or the 'Password' value manually updated.

KB110244
The process of deleting a student record did not allow for the 'EDUCATION_DETAILS' database record to be permanently removed from the system, in **One** 3.48 the deletion process has been updated to enable the system to fully complete the process of deleting a student record.

KB108770
In route Focus | People | Person – Where a new person record is created and the name information is entered all in lower case the initial case value of the name fields were not changed to uppercase, the system has been corrected so the v4 Client is consistent with v3 when saving the person record.

KB108737
The 'Relocation Details' screen omitted the 'Data Panels' security functionality, therefore not allowing selected panels to be hidden to selected user groups, in **One** 3.48 this has been addressed and 'Data Panel' security is now included, therefore enabling selected panels to be hidden from selected users.

KB100031
Error 'Cannot have a Date Deceased when set as Active' displayed when editing 'Looked After' / 'Public Care' information. For **One** 3.48 the system has been updated to allow the 'Looked After' / 'Public Care' data to be managed where the student record is recorded as deceased.

KB89591
Inconsistencies on where the cursor defaults to when a record is saved, in **One** 3.48 where a field has been selected or updated the system will now leave panel in focus for which the selected or updated field resides.

There is still an outstanding issue for grid panels e.g. 'School History' on the 'Student Details' screen, where a record is created in a grid panel the system will display the bottom of the page. The issue is under investigation, but due to potential impacts across the whole system this has not as yet been resolved.

System 3.47

Relationships

Introduction

In versions prior to **One** 3.47, the Relationship Panel was only accessible to **One** customers who had purchased an ICS Licence.

With effect from **One** 3.47, the Relationship Panel will be available to all **One** Customers. The Relationship panel will be available to users when they have selected the Social Network.

Relationships Panel

The Relationships panel has been designed so that Local Authorities can use it according to their individual needs and as such is very flexible. It will enable authorities to utilise existing functions such as the Social Network to quickly create and maintain a list of individuals closely associated with the Child in what can be described as a "Family Group".

The Relationships panel has been developed from the Associations panel which was available to ICS Forms licence holders in the Social Network.

This includes the ability to create any group regardless of the literal "blood" family making it highly flexible.

The **Relationships** panel is located as a panel when the **Social Network** is displayed, and non-ICS Licence holders, providing they have appropriate Permissions, will be able to View the details, Add and Remove Relationships and Edit records.

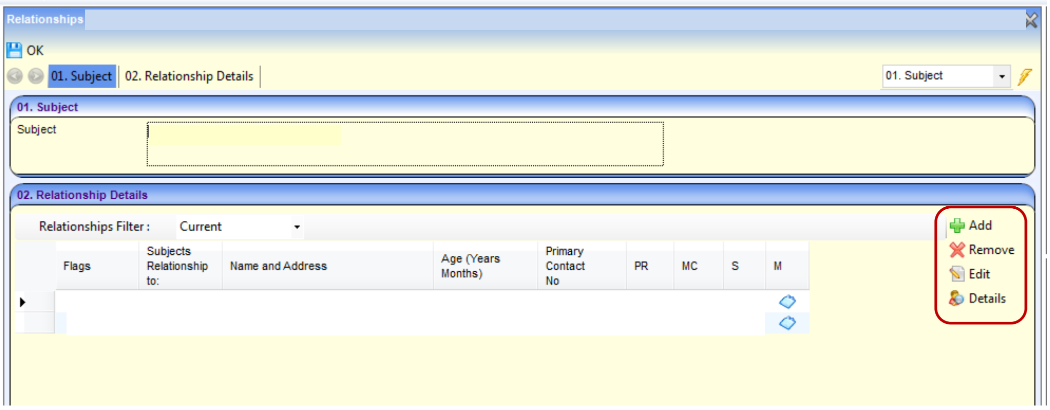
The following information is displayed for each person who has been added to the Relationships panel:

- Flags associated with the Person
- Subjects Relationship to: Name and Address
- Age: The Age field can display an age in years and months, be blank if the record does not have a DoB, or display "Unborn" if the Expected Due Date is set to ticked.
    - On selecting the top of the Age column for the first time after the system displays the Relationship panel the details will be sorted as follows:
        - Blank
        - Unborn
        - Age in Ascending order.
    - If the user selects the top of the Age column a second time, then the system will display the records in the following order:
        - Age in Descending order
        - Unborn
        - Blank
- Primary Contact Number
- Parental Responsibility (PR)

- Main Carer (MC)
- Sensitive (S)
- Memo (M)

Functions available on the Relationships Panel

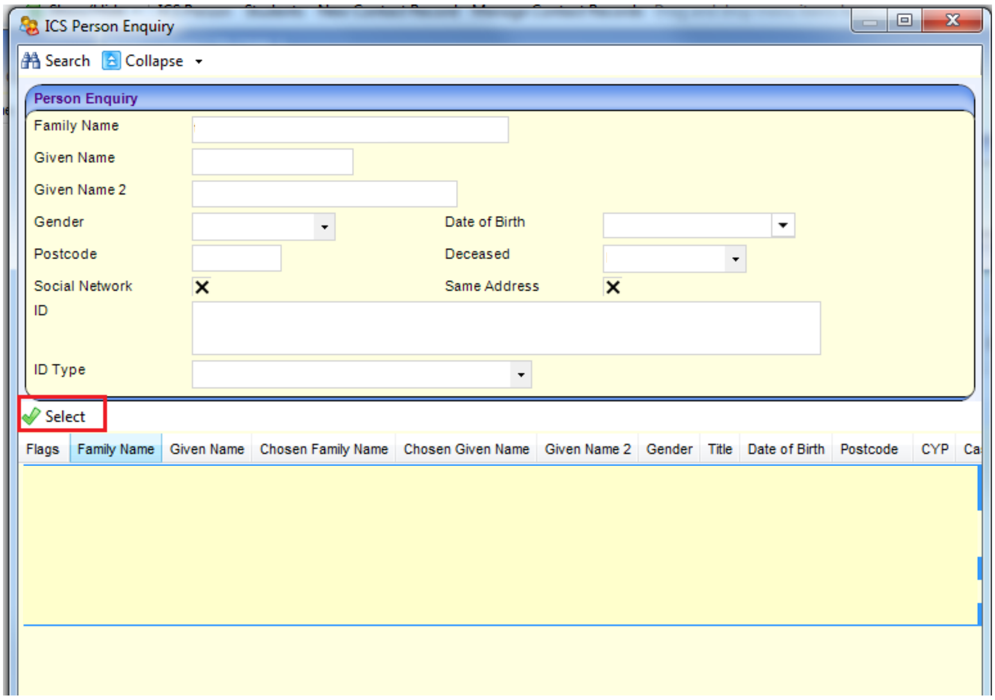
- Add
- Remove
- Edit – Additional fields: Start Date, End Date, End Reason
- Details



Add

The user selects this button in order to **Add** a Relationship to the panel.

On selecting this button the system presents the user with the **ICS Person Enquiry** screen:



The screen is split into discrete functional areas, the top of the screen enables the user to enter Search criteria, and the lower half of the screen displays the results of the search (Flags will be displayed for People in the Results section of the search and in the Relationship Panel itself).

If the requirement is to prevent certain users from viewing these flags then this can be done via Permissions: ICSF Person

"Display Flags for people in Relationships."

Highlight the required people and click **Select**.

If the Social Network for the subject is populated with details of individuals, then upon opening this screen the system will default to displaying these individuals in the results section of the Search. The information displayed in the defaulted results view will be sorted into two groups:

- Individuals who live at the same address, the following business rules are used to identify those living at the same address:
- The system searches for any people who have the same address I.D, and then checks the Date range. If the Date range is current, then the record is displayed. The system does not refer to Address Type.

Example below where the System Date is set to 10/02/2011, and where the details of the people are not associated to the Subject in any way other than possibly Same Address.

Name	Address	Address Type	Start Date	End Date	Comment

Subject:

Name	5Address	Home	01/09/2005		

A	3 Address	Correspondence	01/09/2005	10/05/2010	A lives at a different address so will not be included
B	5 Address	Work	01/01/2004		B lives at the same address and at the same time as Name, therefore will be included
C	5 Address	Home	01/05/2010	06/02/2011	C lived at the same address but not as of the System Date so he will not be included
D	5 Address	Correspondence	11/02/2011		D lives at the same address but started living there after the system date she will not therefore be included.

- Individuals who do not live at the same address but do appear in the Social Network.

Individuals within each group will be sorted in alphabetical order.

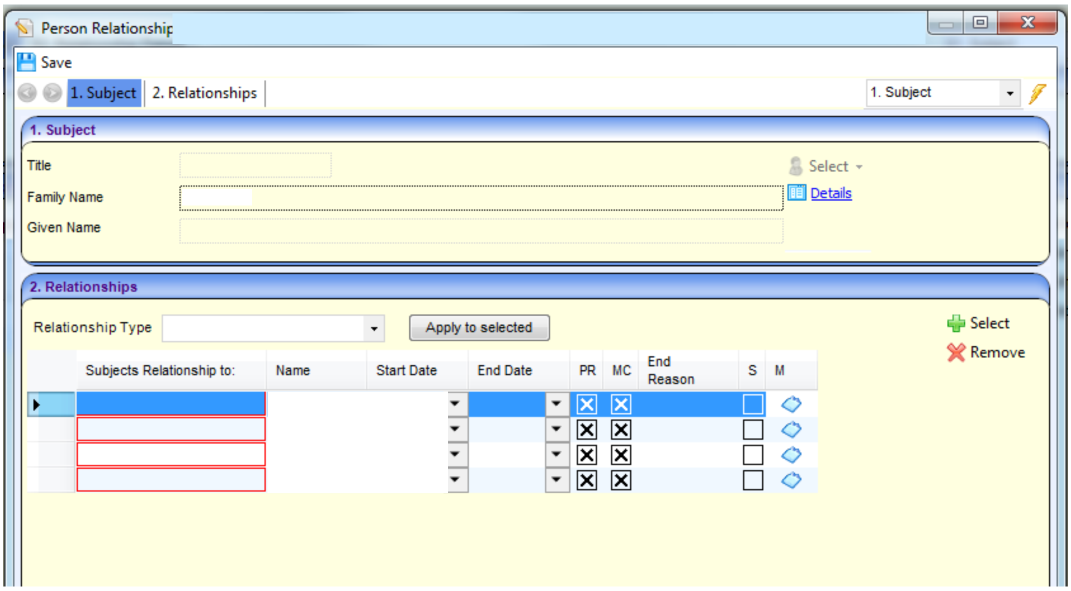
If the user cannot find the appropriate individual to add to the Relationships panel from the default list, the user can enter their own search criteria in order to search from the database. The results of this type of search will not be sorted with People living at the same address displayed at the top of the list.

The user adds individuals to the Relationships panel by selecting them from the results section. This is achieved by highlighting the row of information, and can be done by using the standard techniques for highlighting data:

- Selecting a single row – highlight the row and left click with the mouse.
- Selecting several consecutive rows – highlight the first row in the group, depress the shift key, and move the cursor over the last record in the row and left click the mouse.
- Selecting several rows scattered in the list - highlight the first row, depress the Ctrl key and keep depressed for the whole process of selecting the records, move the cursor over a record and left click the mouse, move the cursor over another row of data and left click the mouse and so on.

Once the required rows have been selected, the user selects the **Select** button.

The system displays the **Person Relationship** screen:



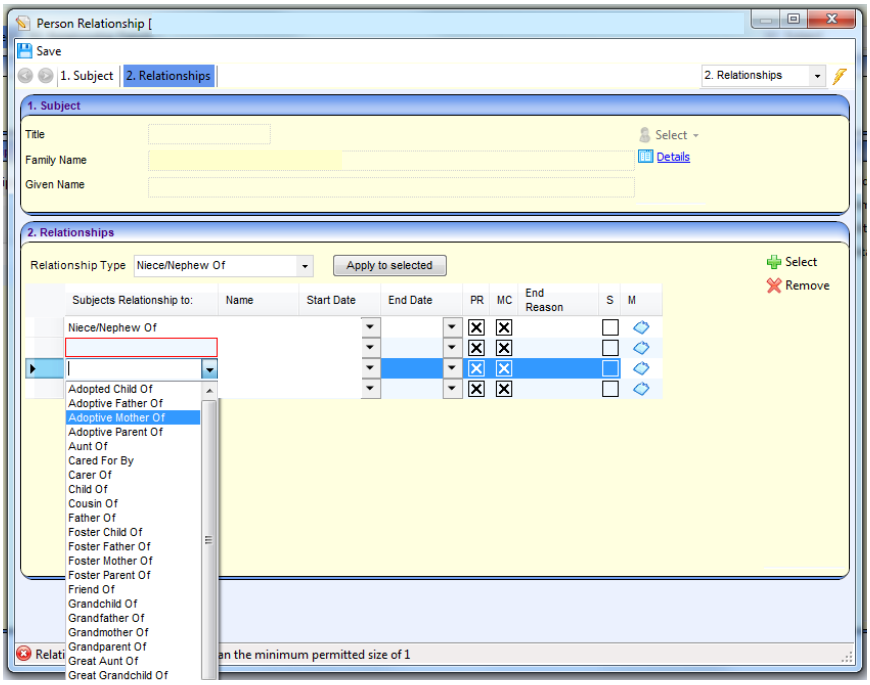
Some of the fields are automatically populated and others need to be edited manually.

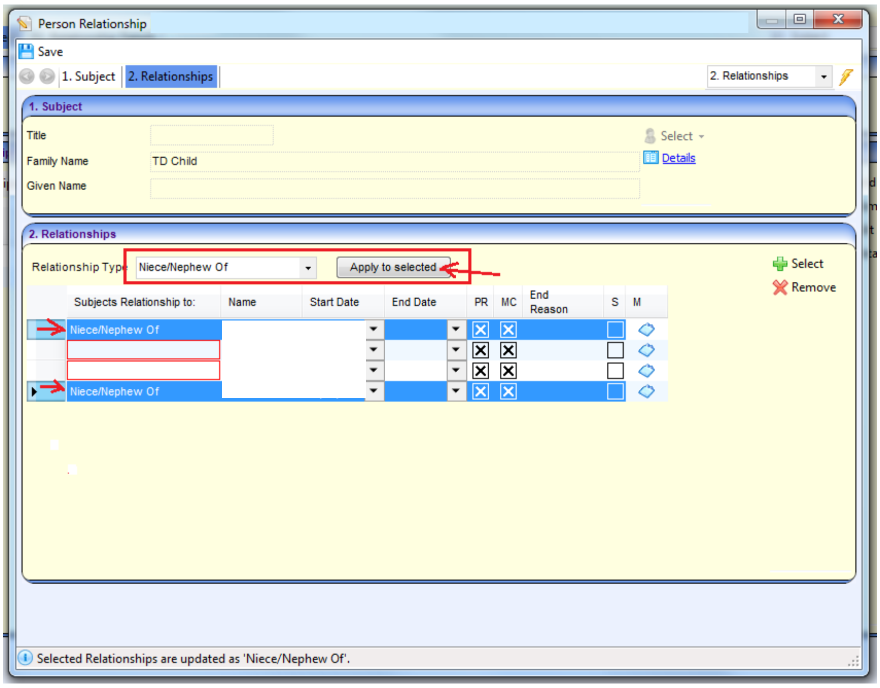
Automatically populated fields:

- **Name** - The system populates the Name column from the ICS Person Results page
- **Start Date** - This date represents when the association between the Subject and the Person in the Relationships panel started. The Start Date will default to the System Date, and is editable
- **Parental Responsibility** - Parental Responsibility is displayed as PR, with the full description displayed as a Tool Tip. This field may be automatically populated if this information has been added elsewhere in either v3 or v4.
  The Parental Responsibility Status is displayed in Guardian Details in v3, and in the Carer panel in v4; we have updated the functionality in these areas so that as far as possible the information is displayed consistently in all of the three areas.

Fields which are manually edited:

- **Subjects Relationship To**: This field is mandatory.
  The user can complete the "Subjects Relationship to" field by:
  - Directly selecting a look up in the individual record
  - By adding the same Relationship, selecting a number of peoples' records, and then selecting the appropriate **Relationship Type** look up
    and depressing the **Apply to Selected** button:





The range of Relationship lookups are as follows:

CODE	DESCRIPTION	REVERSE CODE	REVERSE DESCRIPTION
Child	Child Of	Parent	Parent Of
Parent	Parent Of	Child	Child Of
Adopted Child	Adopted Child Of	Adoptive Parent	Adoptive Parent Of
Adoptive Parent	Adoptive Parent Of	Adopted Child	Adopted Child Of
Foster Child	Foster Child Of	Foster Parent	Foster Parent Of
Foster Parent	Foster Parent Of	Foster Child	Foster Child Of
Stepchild	Stepchild Of	Step Parent	Step Parent Of
Step Parent	Step Parent Of	Stepchild	Stepchild Of
Great Grandchild	Great Grandchild Of	Great Grandparent	Great Grandparent Of
Great Grandparent	Great Grandparent Of	Great Grandchild	Great Grandchild Of
Grandchild	Grandchild Of	Grandparent	Grandparent Of
Grandparent	Grandparent Of	Grandchild	Grandchild Of
Niece/Nephew	Niece/Nephew Of	Uncle/Aunt	Uncle/Aunt Of
Uncle/Aunt	Uncle/Aunt Of	Niece/Nephew	Niece/Nephew Of
Great Niece/Nephew	Great Niece/Nephew Of	Great Uncle/Aunt	Great Uncle/Aunt Of
Great Uncle/Aunt	Great Uncle/Aunt Of	Great Niece/Nephew	Great Niece/Nephew Of
Cared For	Cared For By	Carer	Carer Of
Mother	Mother Of	Child	Child Of
Father	Father Of	Child	Child Of
Adoptive Mother	Adoptive Mother Of	Adopted Child	Adopted Child Of
Adoptive Father	Adoptive Father Of	Adopted Child	Adopted Child Of
Foster Mother	Foster Mother Of	Foster Child	Foster Child Of
Foster Father	Foster Father Of	Foster Child	Foster Child Of
Stepfather	Stepfather Of	Stepchild	Step Child Of
Stepmother	Stepmother Of	Stepchild	Step Child Of
Sibling	Sibling Of	Sibling	Sibling Of
Step Sibling	Step Sibling Of	Step Sibling	Step Sibling Of
Grandfather	Grandfather Of	Grandchild	Grandchild Of
Grandmother	Grandmother Of	Grandchild	Grandchild Of
Great Grandfather	Great Grandfather Of	Great Grandchild	Great Grandchild Of
Great Grandmother	Great Grandmother Of	Great Grandchild	Great Grandchild Of
Uncle	Uncle Of	Niece/Nephew	Niece/Nephew
Aunt	Aunt Of	Niece/Nephew	Niece/Nephew
Great Uncle	Great Uncle Of	Great Niece/Nephew	Great Niece/Nephew Of
Great Aunt	Great Aunt Of	Great Niece/Nephew	Great Niece/Nephew Of
Cousin	Cousin Of	Cousin	Cousin Of
Spouse	Legal Spouse Of	Spouse	Legal Spouse Of
Carer	Carer Of	Cared For	Cared For By
Partner	Partner Of	Partner	Partner Of
Friend Of	Friend Of	Friend Of	Friend Of
Unknown	Unknown	Unknown	Unknown
Other	Other	Other	Other

- The user can type the first few characters in the field, and the system will display those which have the corresponding characters, alternatively the user can select to see all the Relationship Look Ups.
- When the Social Worker adds the Relationship to the Relationships panel, the system will update the Alternate Relationships panel; that is the Relationships panel of the other person.
- The system will check the gender of the Alternate Relationship and where Alternate Relationships have a gender dependent description the system will use that Description, e.g. where the Subject is Grandchild, then when the alternate is a Male then the relationship will be Grandfather.
- Where the gender is not specified then the system will use the non-gender specific Relationship descriptor, e.g. Grandchild, - Grandparent.
- If the Social Worker edits the Relationship Type, then the Alternate Relationship will be updated.
- If the Social Worker has entered a Relationship in error, the **Remove** button can be selected. This action will remove the Subjects record in the Alternate Relationship panel.
- The Table Name for the Relationship Types used is - ICSF_PERSONASSOCIATION.
- **Please note** that the Relationship Type table should not be edited by customers of One. This action can only be undertaken by request to Capita One. If this is done by a customer of **One** then Capita **One** cannot guarantee the correct performance of the adding the Alternate relationships
- If the Social Worker attempts to add the Subject as having a Relationship with him/herself the system will not allow the Social Worker to do this and will present the Social Worker with a message indicating this fact.

- **End Date** - This date represents when the association between the Subject and the Person in the Relationships panel ended, this information will be stored in the database and will be visible in the Relationship Panel thus providing a visible history of the Relationship changes for the subject.
- **End Reason** - End Reason descriptors are entered via Tools| Administration | Look Ups, they are defined by the user (*Table_**ID 1060,** Association End Reason*). End reason is not mandatory.
- **Main Carer** - This field was requested by ICS customers so that they could record i*f the Person in the Relationships pan*el acted as the Main Carer for the subject; a role which is discretely different to that of Parental Responsibility.
  Main Carer is displayed as **MC**, with the full description displayed as a Tool Tip.
- **Sensitive** - The Sensitive field is displayed as **S**, with the full description displayed as a Tool Tip.
  In versions prior to **One** 3.44, the field was for information only, so no business rules have been applied. There is no change to the functionality of the Sensitive Flag in this release.
- **Memo** - The contents of this field are specific to the Subject to Person (in the Relationships panel association) combination. So wherever the Memo for that association is displayed on the Subjects record the contents of the Memo will be displayed. If the user opens the ICS Person Details record for the alternate person (i.e. the person in the Relationships panel of the subject), then the details in the Memo on this record will be different since they relate to the Reverse Relationship.
- **When either the Start or End Dates are entered in error** – To completely remove a date added in error in the Relationship Panel the user should use the Delete Key on the keyboard.

The user can move between both screens, until all the required people have been selected and their details amended.

Once the details have been added the user selects the **Save** button and the Relationship(s) are added to the Relationships panel.

Remove

If a user Adds a Relationship in error the record can be removed by highlighting it and selecting the **Remove** button. This action will remove the record in the Alternate Relationships panel as well.

Edit

If details need to be amended, or information needs to be added to the Memo, then the user will need to highlight the record and select the **Edit** button. When details are added to the Memo field, then on Save the Memo icon will change colour to pink, and appear as if a pen is against the memo.

Details

Select the **Details** button to view the ICS **Person Details** of that Person

RG_Relationships_Social Network is available on the DVD to help you with this process.

Known Issue with Start Date, End Date and End Reason

Known Issue: **Start** and **End Date** and **End Reason** are not copied / edited in the reverse Relationship.

Permissions

The Permissions for the Relationship Panel are the same as those in the Associations Panel. Users will be able to control who has access to the Relationship Panel, in addition Permissions are available to control Adding, Editing, , Saving and Removing Relationship.

In Tools | Permissions | User Group Permissions | All Secured Services | Associations, the following permissions relate to the Relationship Panel:

Description of the Permission at 3.44 and prior	**Used by ICS Relationships**
Delete a person contact	No
Remove Relationship	Yes
Display Association/Relationship End Reason Lookup Codes	Yes
Display Association/Relationship Type Lookup Codes	Yes
Display content of the following data when in add or edit mode, - Primary Contact No., Parental Responsibility, (Carer Definition as well) Establishment Due Date	Yes
Get Establishments	No
Display default list of people in Results of Search on selecting Add a Relationship	Yes
Display Relationships in Social Network Diagram	Yes
Display of all details in Social Network except Relationships	Yes
Get a lookup list of Doctors	No
Get a lookup list of Health Visitors	No
Get a lookup list of Involvement Types	No
Get a lookup list of Professionals Involved	No
Get all contacts for a person	No
Get contact details for a person	No
Save Relationship Record	Yes
Modifies or deletes a key workers association for a person.	Relates to Adoption
Save a person's contact	No

Please be aware that the system will enable Non Licence Holders of ICS, to access some areas of ICS. In order to avoid confusion to your users we therefore recommend that you consider setting Deny Permissions to Chronology, Contact Record, and ICS Person Foci.

Scheduled Tasks

Scheduled Tasks have always been maintained and run from the Scheduled Task.xml file which is located on the Application Server. To update and maintain Scheduled Tasks, this would be done by accessing the Scheduled Task.xml file and manually updating the tags. However, we have now introduced the functionality for the user to be able to manage their Scheduled Tasks within the v4 system. This has been introduced to enable users who have load balanced servers to be able to maintain their Scheduled Tasks and still enable the users to see the changes regardless of the current application server they are logged on to. This is something which was not possible with the Scheduled Task.xml file.

The introduction of Scheduled Tasks within v4 will not impact any existing Scheduled Tasks set, as long as the existing Scheduled Tasks are imported into v4 via the CSS Configuration Tool, before any new Scheduled Tasks are created. The functionality of how the Scheduled Tasks are run will not be changing, just the way they are set.

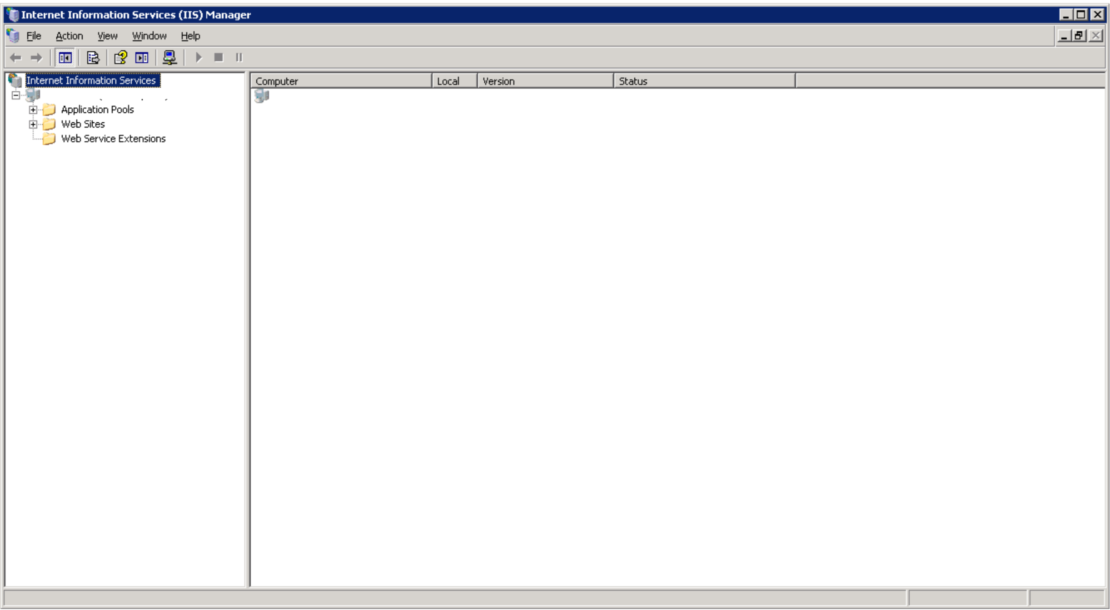
Note: An iisreset needs to be performed and the user needs to log in to the v4 client and connect to the Application Server the Scheduled Task is held on to activate the Scheduled Tasks. This should be done straight after the existing Scheduled Tasks have been imported.

Importing an Existing Scheduled Task: The ability to import Scheduled Tasks will be available in the CSS Configuration Utility.

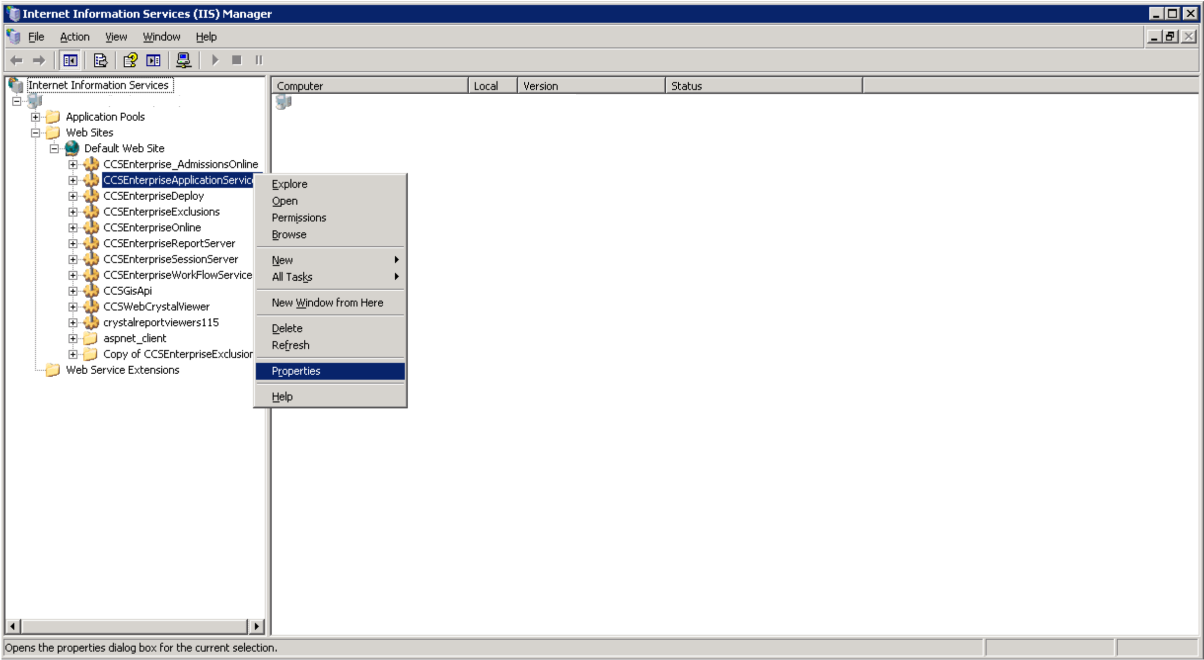
The CSS Configuration Utility requires an http channel. If the site is running on https then this will need to be changed very briefly so that the import can go ahead.

NOTE: If the following steps are not carried out then the Scheduled Tasks will not import.

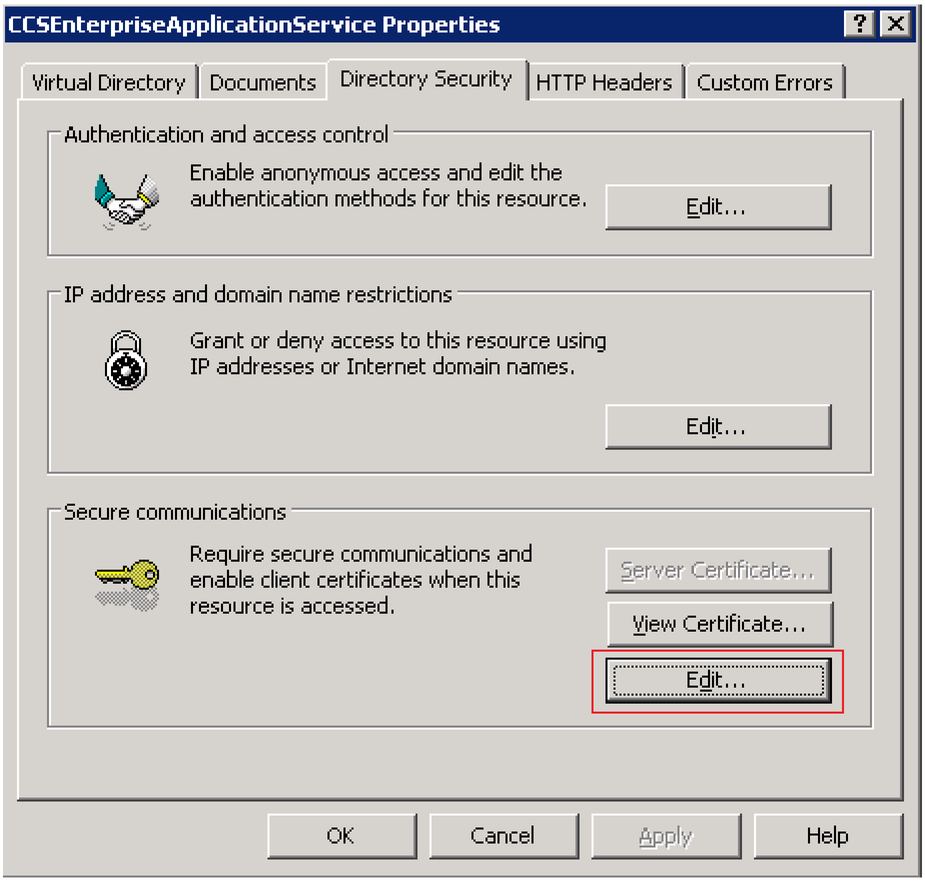
On the server go to Start | Run and type – **inetmgr**. This will bring up the Internet Information Services (IIS) Manager.



Expand Web Sites and then Default Web Site, this should give you access to the CCSEnterpriseApplicationService. Right click on CCSEnterpriseApplicationService and select Properties.

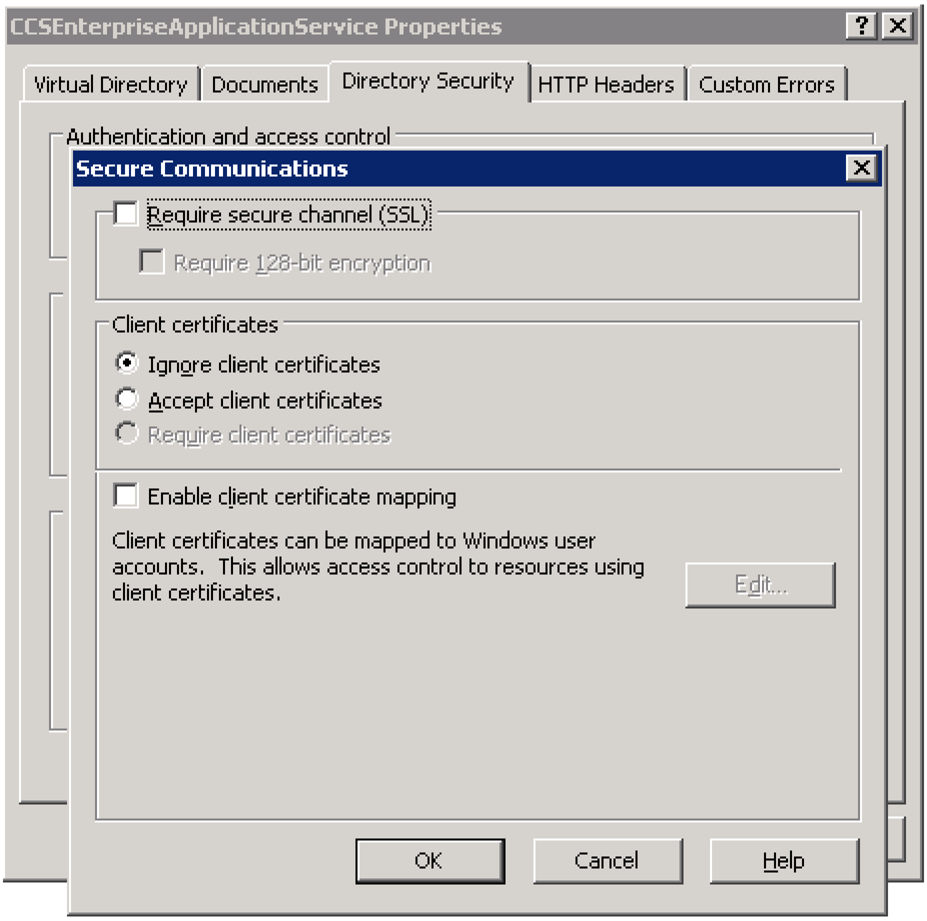


On the Directory Security tab there is an Edit button within the Secure Communications section.



Click on Edit and you will be presented with the Secure Communications page.

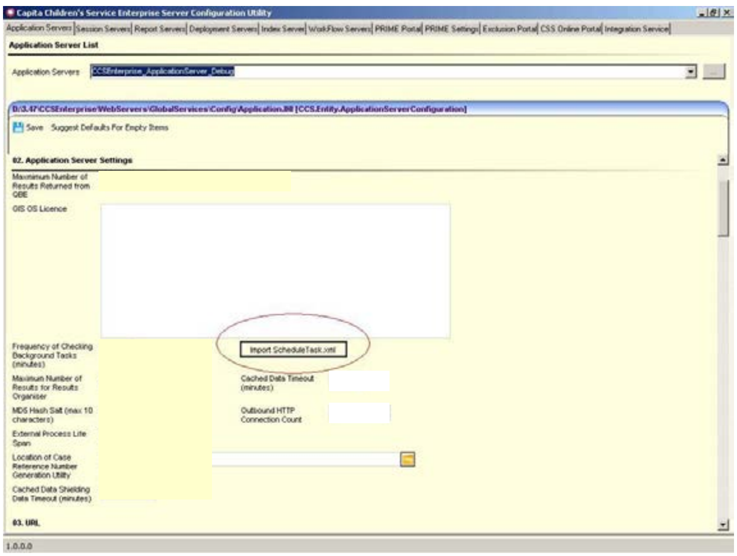
In here you will need to uncheck the Require Secure Channel (SSL) check box so it displays as the following –



Once this has been done then click OK to Apply the changes.

NOTE: After the Importing of Scheduled Tasks, please go back and set the Require Secure Channel (SSL) to what it was set to before the Import was carried out.

Within the CSS Configuration Utility there is be an **Import Scheduled Task** button under the **Application Servers** tab.



Once this has been run, any existing Scheduled Tasks that have been created will have been imported into v4 and can be maintained under Tools | Administration | Scheduled Task. The option of using the old scheduled task.xml will no longer be available. All scheduled tasks will need to be set and maintained in v4 once the import has been done.

Any Alerts that have been set against a Scheduled Task will also be migrated across in to the new Scheduled Tasks.

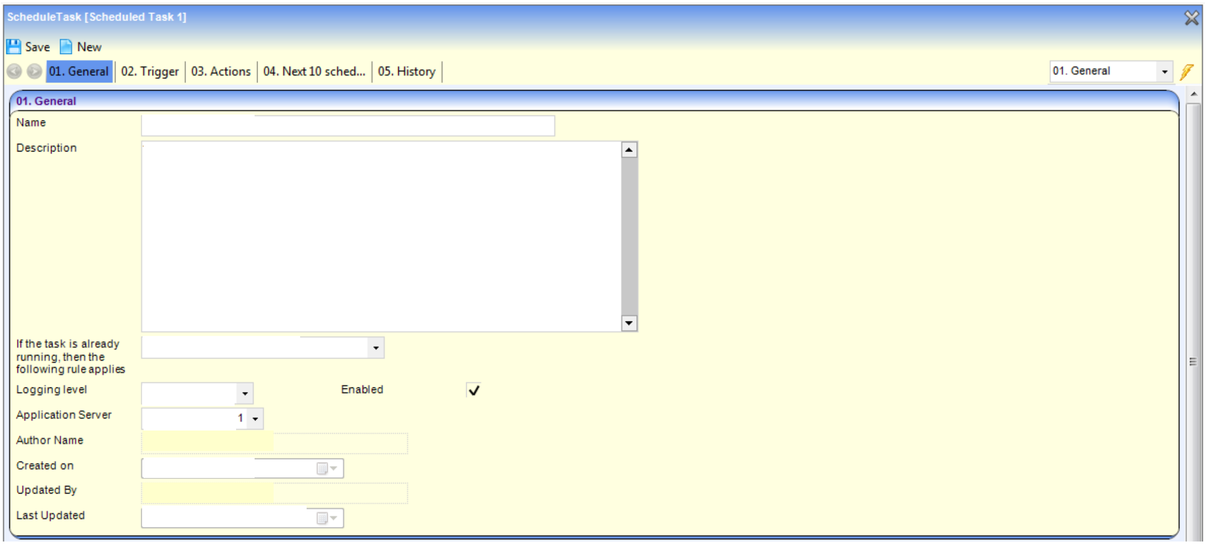
Note: It is ESSENTIAL that the user imports any existing Scheduled Tasks before creating any new Scheduled Tasks. If this is not done then this could result in Scheduled Tasks being duplicated.

Once the scheduled task.xml file has been imported we strongly advise not to change the A&T Emails and Email Queue Processor actions after they have been imported into v4.

IF THESE ARE CHANGED THEN IT COULD RESULT IN A&T EMAILS NOT BEING SENT OR BEING SENT MULTIPLE TIMES.

Creating a New Scheduled Task

The General panel will display the basic details which will include the scheduled task name and description, as well as details on who created and last updated the scheduled task. There is also an ability to set a Logging Level, whether or not the task is enabled or disabled and also the ability to manage tasks if more than one task is set to run at the same time.



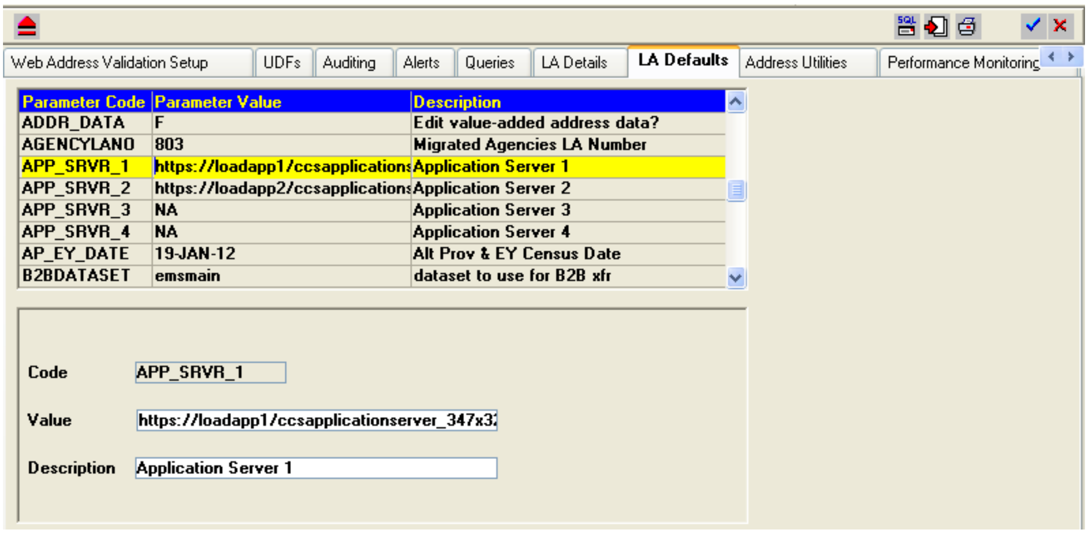
If the **Enabled** check box is set to **True**, then the Scheduled Task will be enabled and will run as planned. If the Enabled check box is set to **False**, then the scheduled task will not run.

The **Author Name** is the name of the user who created the Scheduled Task. The **Created On** date is the date and time the Scheduled Task was created, not the time of when the first scheduled task is due to be run.

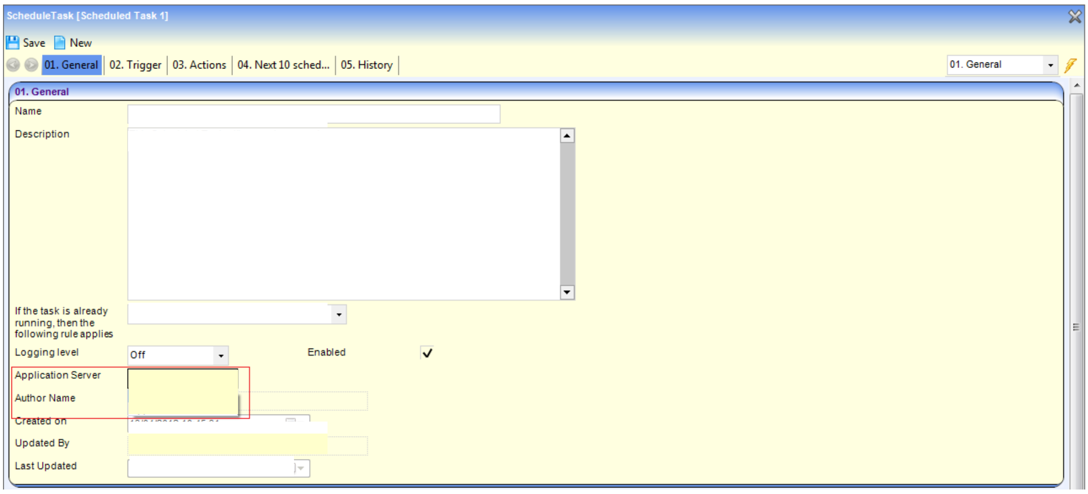
If the Scheduled Task is updated at any time then the user who updated it will appear in the **Updated By** column, along with the time they updated it in the **Last Updated** column.

Application Server Dropdown

The Application Server dropdown box will contain the details of the Application Server(s) the scheduled task will be saved and run on. This will give the user the option to choose which Application Server they would like their Scheduled Task to run from. The Application Server(s) details are added in to the LA Defaults tab in v3 System Administration –



In here the exact name of the Application Server(s) will need to be added to the Value field. All Application Serves will need to be added in here whether a load balanced environment is being used or not. The Description field will contain a brief description of what that particular Application Server is so it can be identified in v4. The Description is what will show in v4 when selecting an Application Server to save and run the Scheduled Task from within v4 –



NOTE: If the Application Server URL is entered incorrectly in to v3 then the Scheduled Tasks will not run.

Task Already Running

Also on the General panel there is a dropdown called **'If the task is already running, then the following rules apply'**. Select from one of two options:

- **Do not start a new instance** - If there is a repetition of Triggers set for the Scheduled Task and there is a possibility of them overlapping, then this will run the first Trigger to be picked up and none of the others.
- **Queue a new instance** - If there is a repetition of Triggers set for the Scheduled Task and there is a possibility of them overlapping, then when the first Trigger has been completed, the second one will begin and so on.

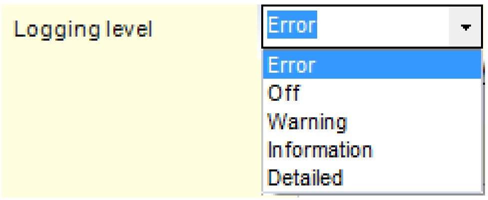
Note: This is defaulted to 'Do not start a new instance', but can be changed by using the drop down to select 'Queue a new instance'.

In the unlikely scenario that the queued Trigger ends up running at the same time as a Scheduled Trigger, then the Scheduled Trigger will queue and wait for the original queued Trigger to complete. Once complete the Scheduled Trigger will run.

Logging Level

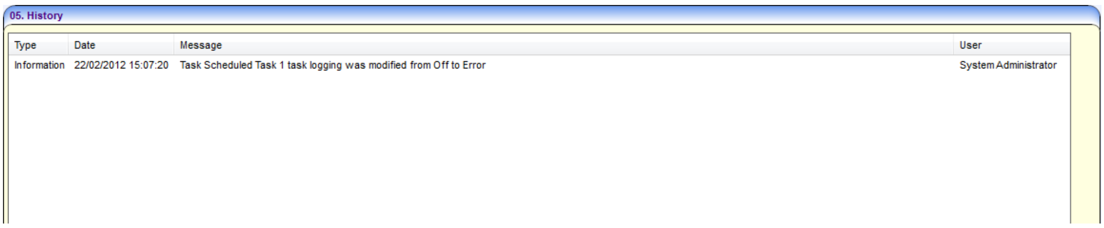
When a Scheduled Task has been run, there are certain messages which are brought back and displayed within the **History** panel. The messages are notifications as to whether or not the Scheduled Task was successful. There are four message types which provide the user with various pieces of information on the Scheduled Task after it has been run. These types are **Error**, **Warning**, **Information**, and **Detailed**.

The Logging Level dropdown enables the user to select which type of message they are interested in bringing back and displaying in the History panel. The dropdown displays as:



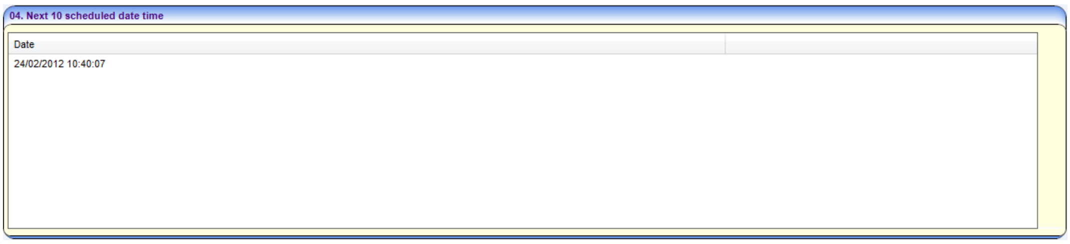
The message types work as a hierarchy:

- If **Error** is chosen, the following message types will be displayed: Error, Warning, Information and Detailed
- If **Warning** is selected, then Warning, Information and Detailed messages will be displayed
- If **Information** is selected, then Information and Detailed messages will appear
- If **Detailed** is selected, then only the Detailed messages will be displayed.



Next 10 Scheduled Date Time

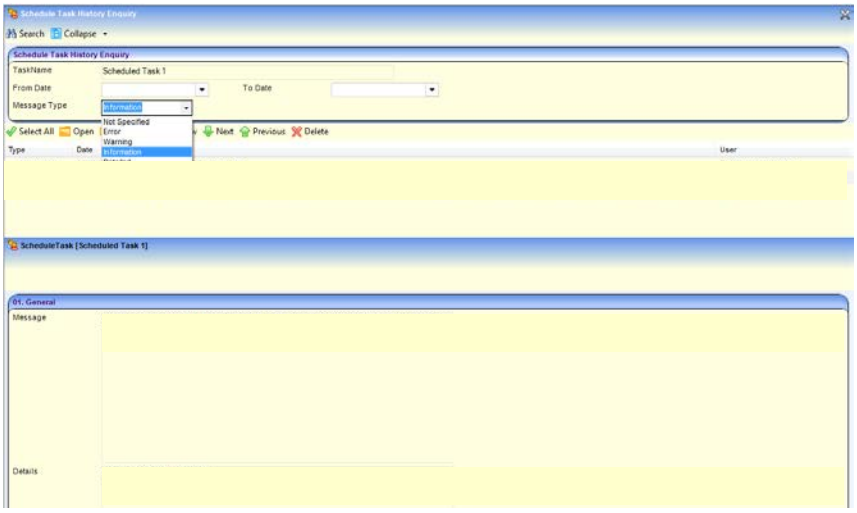
The **Next 10 Scheduled Date Time** panel will display the next 10 Scheduled Task Date and Times for the Trigger set on the Scheduled Task. Once the next Scheduled Task has been run, then the first Scheduled Task outside of the ten due to run will now appear in the panel.



Scheduled Task History

The **Scheduled Task History** will display all of the messages and details for all Scheduled Tasks that have been run. The Scheduled Task History is accessed via the **Links** menu and can be accessed to display any messages which are specific to the Scheduled Task or the Scheduler itself. When on the Summary screen of Scheduled Tasks, if the user clicks in the **Task Name** box and leaves it blank and then accesses the Scheduled Task History link, any messages which refer to the actual Scheduler will appear.

When accessing the Scheduled Task History via an open Scheduled Task, any messages and details relate to just that Scheduled Task. The history information can be searched on by using Date Range search criteria and/or the Message Type. There are four message types to choose from: Error, Warning, Information and Detailed, e.g. if Information is selected then only the Information messages will be returned. These are the same messages that appear in the History panel on the main Scheduled Task screen.



If the Message Type of **Not Specified** is chosen, then this will return all Message Types related to that Scheduled Task.

Scheduled Task History can also be maintained by deleting any messages that are no longer needed. This is a permanent deletion and there is no way of returning any of the deleted data.

When creating a new Scheduled Task, the user will need to set which **Action** the Scheduled Task will be set for along with the Trigger details. The Trigger details will determine when and how often the Scheduled Task will be run.

Actions

The **Actions** which can be set for Scheduled Tasks can be found within the Actions panel. These Actions remain the same as they have always been in **One** and are as follows:

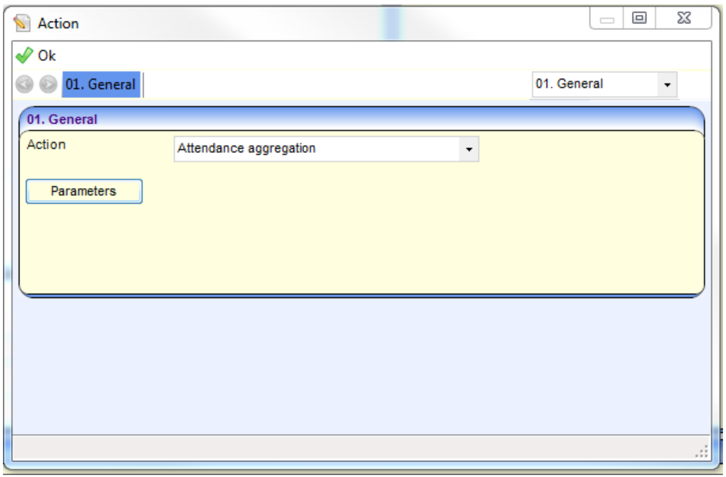
- Attendance Aggregation
- A&T Emails
- Early Years Feedback Messages
- ECAF Auto Messages
- Email Queue Processor
- ICSF Hazard Flags
- Absentees Inv Flags
- School History
- Alerts
- Alert Outcomes
- Delete expired alert messages
- Do nothing

It is not possible to have the same Action appear more than once on a Scheduled Task. However, it is possible to have multiple different Actions set for the same Scheduled Task.

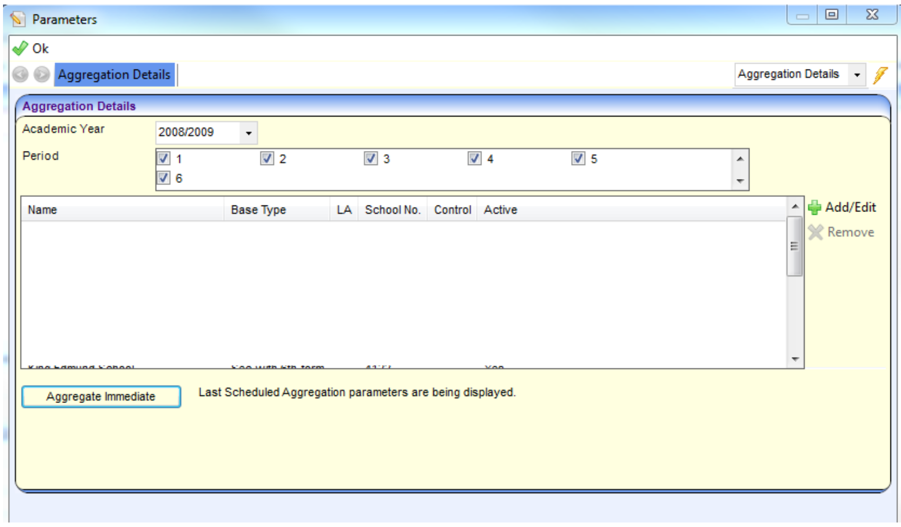
<u>Note:</u> It is advisable not to modify any existing A&T email Scheduled Tasks or create any new A&T email Scheduled Tasks without referring to Capita One for approval.

Attendance Aggregation Action

When setting the Action to **Attendance Aggregation** then the user will be presented with a **Parameters** button.



This will enable the user to set the **Attendance Aggregation** details.



This data is currently available via Tools | Administration | Attendance | Attendance Aggregation.

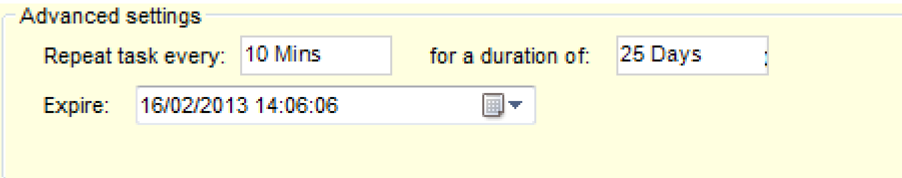
If the **Aggregate Immediate** option is run from here then this will not have an effect on any Attendance Aggregation Scheduled Tasks. These Scheduled Tasks will continue to run at their scheduled time.

Triggers

Note: Do not alter this section for imported A&T email tasks, it will not affect the frequency with which they are generated and may prevent them from going out at all.

The **Triggers** panel is where the details of the Scheduled Task can be set. This will include when and how often the Scheduled Task is to be run, based on five different time specifications, **One Time**, **Daily**, **Weekly**, **Monthly** and **Monthly Days of the Week**.

These time specifications all have the option to repeat the task every minute, hour or day for a maximum of 31 days. This can also span over a duration of minutes, hours and days, the maximum amount of days being 366. However, if the **For a Duration of** box is left blank, then on saving the Scheduled Task, this will display as '**Indefinitely**'. This is done within the **Advanced Settings** section.



The **Expire** date for the Scheduled Task can be manually modified but it will **default** to a year in advance from when the Sheduled Task was set.

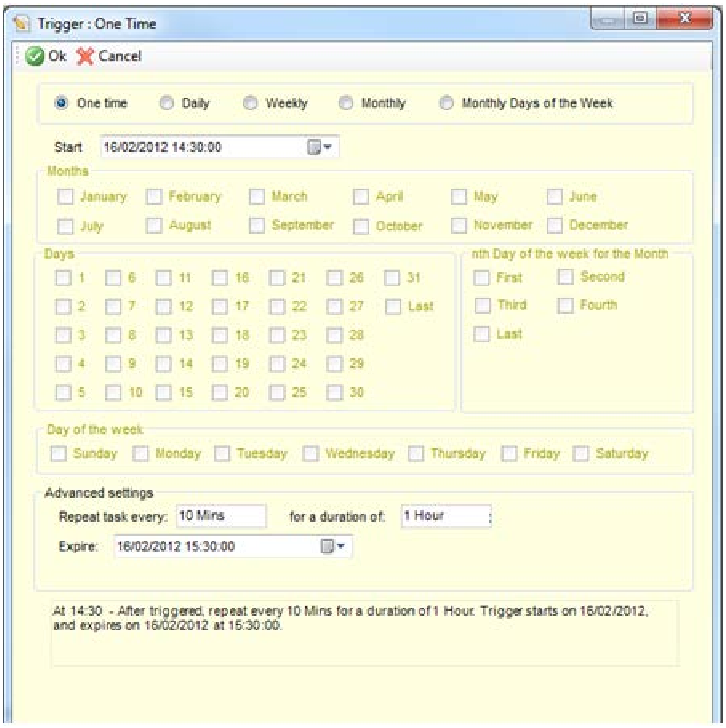
If the Scheduled Task is set to Enabled then it will be available to run. If the Enabled box is not checked then the Scheduled Task will not run.

Note: **The time validation can be set as seconds, secs, s, minutes, mins, m, hours, hrs, h, day, days and d.**

How to set Triggers

One Time Trigger

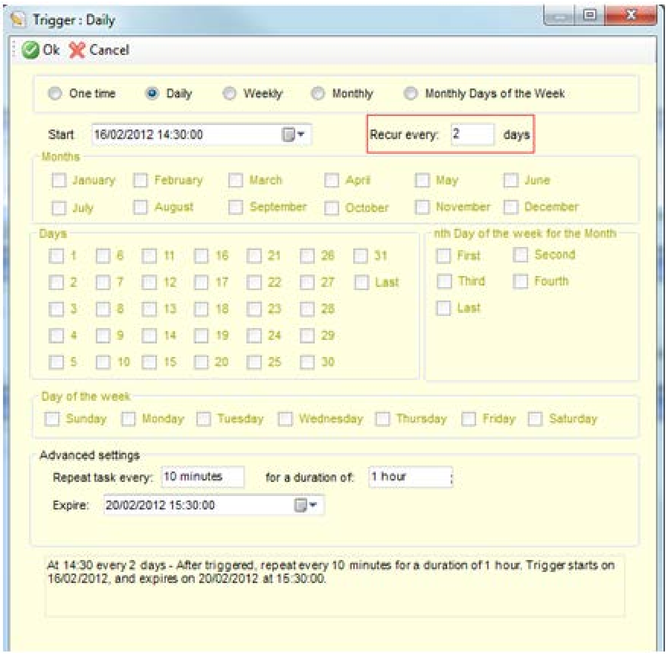
The **One Time Trigger** will enable the user to set a one off Scheduled Task which doesn't occur on a regular basis. The Advanced Settings panel will be available for the user to set a repetition for a duration of time with an Expiry date as it is for all time specifications. However, this One time Trigger gives the user the option to just run the Scheduled Task once so that Scheduled Tasks aren't just set to run over a set period of time.



<u>Note:</u> When Scheduled Tasks are set, then a summary of the task will appear as a summary at the bottom of the Triggers panel. This summary will also appear in the Triggers column of the Scheduled Task search screen when searching for the Scheduled Tasks.

Daily Trigger

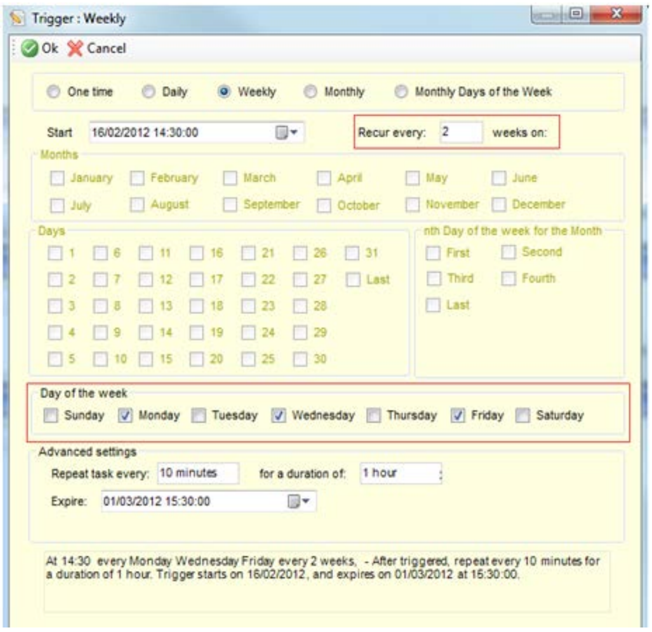
The **Daily Trigger** option will enable the user to Schedule a Trigger to run either every day, or on certain days, either once, or multiple times. When the Daily option has been selected then the **Recur every 'x' Days** option will be available. This will enable the user to set the scheduled task to re-occur over a number of days.



The **Advanced Settings** panel will also be available to add the **Expire** date and to determine whether or not the task needs repeating over a duration of time.

Weekly Trigger

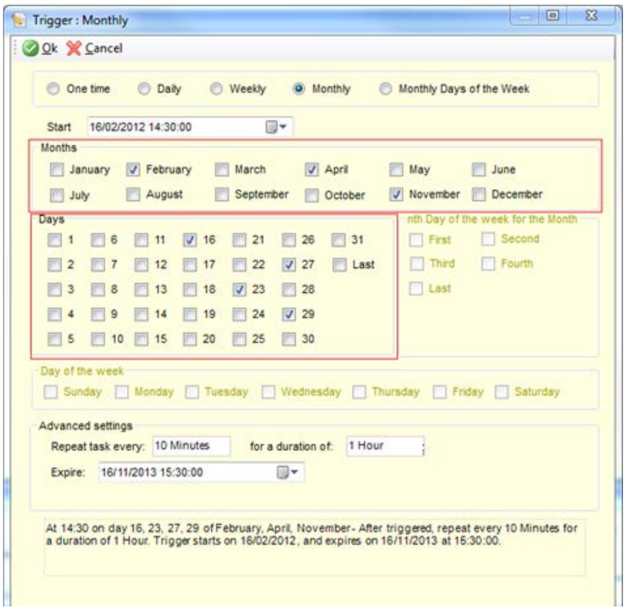
The **Weekly Trigger** option will enable the user to schedule a Trigger to run on certain days of the week, either once, or multiple times. When the Weekly Trigger option is selected then the **Recur every 'x' weeks on**: option will be available as will the Day of the Week section. In here you can determine which days of the week the scheduled task will run.



The **Advanced Settings** panel will also be available to add the **Expire** date and to determine whether or not the task needs repeating over a duration of time.

Monthly Trigger

The **Monthly Trigger** will enable the user to set a Scheduled Task to run on a particular or multiple days of a month for a particular or multiple months of the year. The **Months** section will become available where the user can select one or multiple months. The **Days** section will also be available where the user can select one or multiple days of the month.

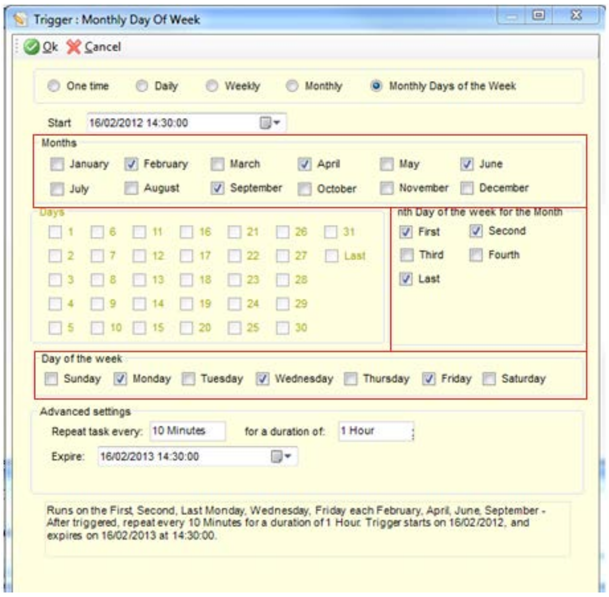


The **Advanced Settings** panel will also be available to add the **Expire** date and to determine whether or not the task needs repeating over a duration of time.

Monthly Day of Week Trigger

The **Monthly Day of Week** Trigger will enable the user to run a Scheduled Task on a specific day in a week for a specific month or multiple months. This functionality enables the user to set a Trigger for anywhere from the first week to the last week of the month. This can be set on a specific day in that week, e.g. I want a trigger to run on the third Friday of every month.

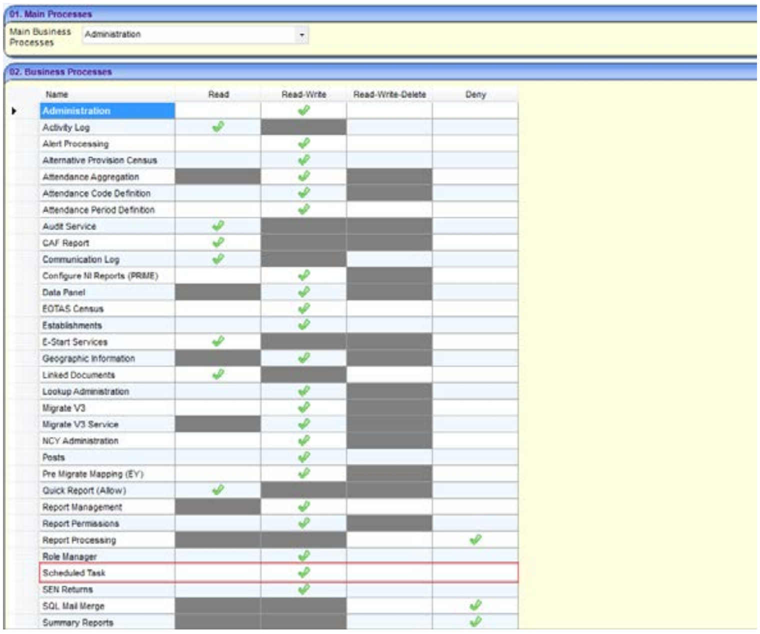
The **Months**, ***n*th Day of the Week for the Month** and **Days of the Week** sections will become active. There is no option for the monthly days of the week Trigger to re-occur.



The **Advanced Settings** panel will also be available to add the **Expire** date and to determine whether or not the task needs repeating over a duration of time.

Permissions

Access to the Scheduled Tasks can be set within Tools | Permissions | User Group Processes. **Scheduled Task** will appear under the **Main Business Process** of **Administration** and will have Read, Read-Write, Read-Write-Delete and Deny permissions available to be set against it.



These are standard permissions in v4 and will work as other permissions do, e.g. if Scheduled Task is set to **Read** only then the user will not be able to make any amendments to any Scheduled Task but will be able to view all the relevant information.

Scheduled Tasks in A&T

It is vital that the existing **Scheduled Task.xml file** is imported in to v4 before creating any new scheduled tasks. Once the scheduled task.xml file has been imported then we strongly advise not to change the A&T Emails and Email Queue Processor actions after they have been imported in to v4.

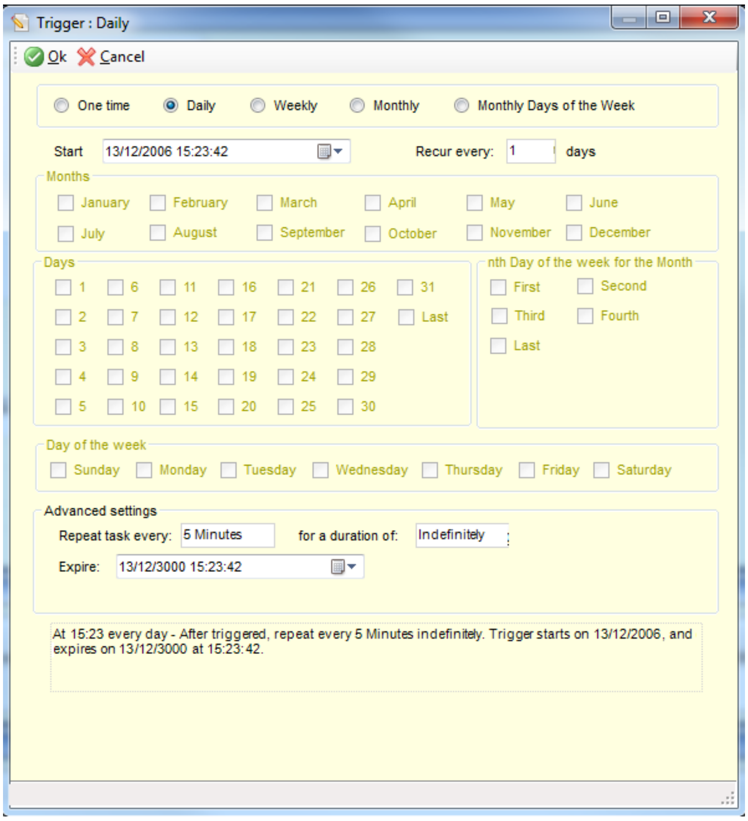
IF THESE ARE CHANGED THEN IT COULD RESULT IN A&T EMAILS NOT BEING SENT OR BEING SENT MULTIPLE TIMES.

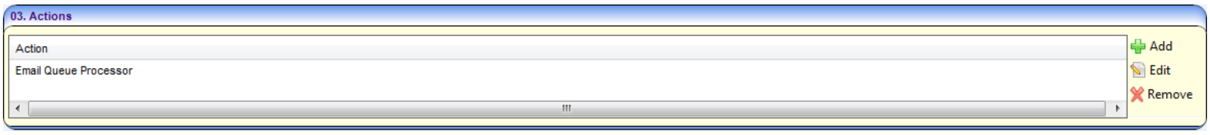
We strongly advise to import existing Scheduled Tasks instead of re-creating them manually. However, if you choose to do so then please continue to have the A&T emails setup exactly the same as before. The current default setup for the A&T emails in the scheduled task.xml is as follows:–

Email Queue Processor

```
<ScheduledTask xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
<TaskName>EMAIL_QUEUE_PROCESSOR</TaskName>
<TaskType>StoredProc</TaskType>
<NextRunDate>2006-12-13T15:23:42</NextRunDate>
<StartHour>0</StartHour>
<StartMinute>0</StartMinute>
<RepeatInterval>5</RepeatInterval>
<RepeatIntervalUnit>Minute</RepeatIntervalUnit>
<LastRun>2006-12-13T15:08:42</LastRun>
<LastError />
</ScheduledTask>
```

If this was to be set up manually within the new Scheduled Tasks screen then the setup would be as follows:



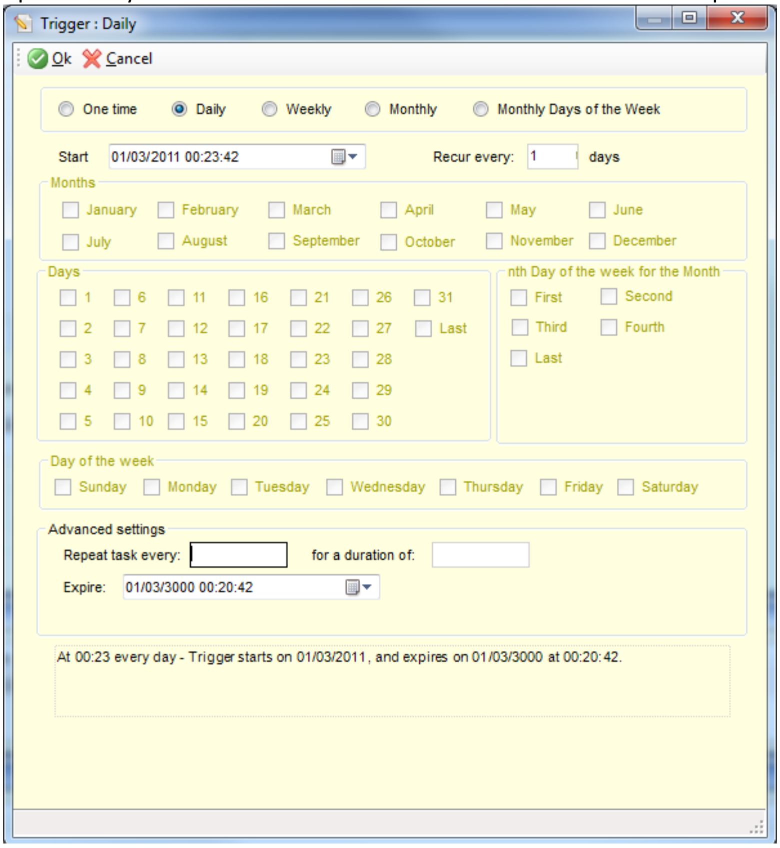


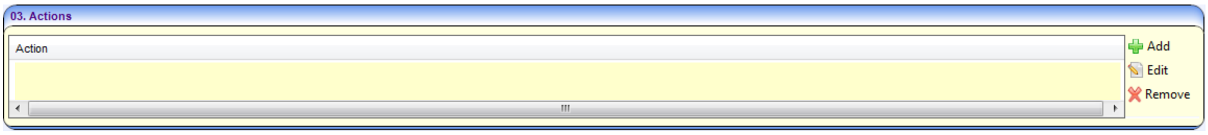
Note: The Task Name will be taken from the old Scheduled Task.xml file. This will be taken from the TaskName tag.

A&T Emails

```
<ScheduledTask xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
<TaskName>PROCESS_ANT_EMAILS</TaskName>
<TaskType>StoredProc</TaskType>
<NextRunDate>2011-03-01T00:23:42</NextRunDate>
<StartHour>0</StartHour>
<StartMinute>23</StartMinute>
<RepeatInterval>1</RepeatInterval>
<RepeatIntervalUnit>Day</RepeatIntervalUnit>
<LastRun>2006-12-13T00:08:42</LastRun>
<LastError />
</ScheduledTask>
```

If this was to be set up manually within the new scheduled tasks screen then the setup would be as follows:



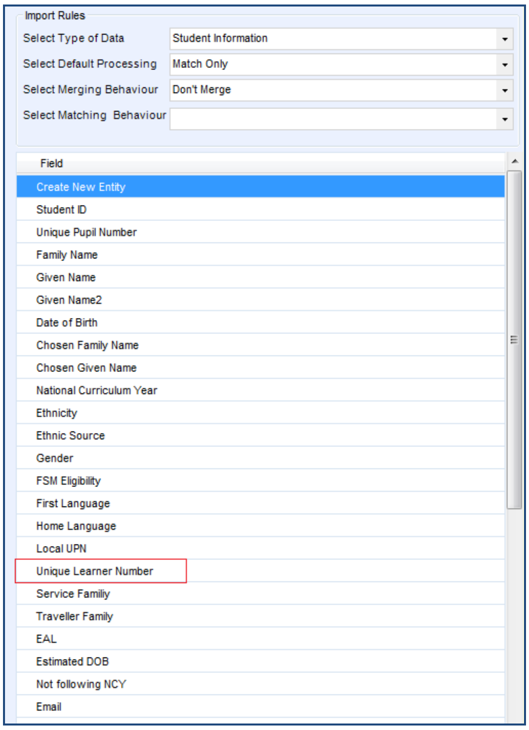


<u>Note:</u> The Expire date will default to one year on from the start date. It is advised that this is changed to a future date.

ULN (Unique Learning Number) Import

KB89566 - System updated to allow ULN to be imported through v4

We have introduced the option to have the Unique Learner Number (ULN) imported via the Data Import routine. When creating a new Data Map the ULN option will be available under the Student Information drop down.



When the ULN is imported it will display in the Unique Learner Number field within Student Details.

BTA Improvements / Enhancements

The **One** 3.47 release includes a number of ‘Barrier to Adoption’ (BTA) items that restricted customers from fully utilising the v4 Rich Client in relation to permissions or missing functionality.

A number of system defects have been resolved, some of which are system functions and others that impact on the way the user interfaces with the system.

Enhancement to Permissions on the ‘Student Details’ Screen

Previously ‘System Administrators’ did not have the flexibility to permit ‘Read’ access to the ‘Student Details’ screen whilst allowing certain panels / information to be updated. In the **One** 3.47 release the system will allow ‘Read’ to Student Core data with ‘Read-Write’ or ‘Read-Write-Delete’ access to other panels with minimal impact to current permission levels set.

Where ‘Read’ access is permitted to Business Process ‘Student Core’ under main process ‘Student data’ the system previously allowed values to be edited in panels such as ’**01. Student Identifiers**’ or ’**05. Contact Details**’ or ’**06. Contact Details**’, but the ‘Save’ button was not provided to commit the changes.

In **One** 3.47 the panels stated below will be disabled where ‘Read’ permission has been granted therefore providing read only access to the Student Detail panels:

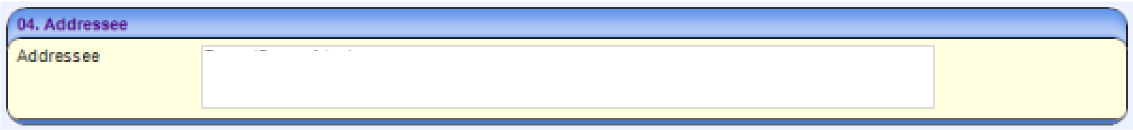
- '01 Student Identifiers'
- '04. Contact Details'
- '05. Student Profile'
- '06. Supporting Details'
- '07. LA Details'
- '09. Language/Means of Communication'
- '10. Ethnicity, Religion and Culture'
- '13. Asylum Details'
- '14. Traveller Family'
- '16. Deceased Details'
- '29. Contact Point Stop Notice'
- '32. Deferred'
- 'User Defined Fields'

Where ‘Read’ access is permitted to Business Process ‘Core Data’ and ‘Read-Write’ permission to ‘School History’ user will have the ability to manage data in panel ’02. School History’ (Add / Edit records), but where ‘Read-Write-Delete’ is permitted then full access is granted so the ‘Remove’ button will be enabled. As stated the bulleted panels cannot be updated where ‘Read’ permission is set on ‘Core Data’ business process.

The same level of flexibility has been applied to the ’**03. Address Details**’ panel, where the user is permitted ‘Read’ access to ‘Core Data’ but ‘Read-Write’ or ‘Read-Write-Delete’ to the Business Process ‘Person/Student Addresses’ under Main Business Process ‘Addresses’ - the system will correctly allow the user to manage the address information.

Where ‘Read’ access is permitted to ‘Person/Student Addresses’ previously the system would allow the user to amend values on the address history link record, the system will now in this scenario set the listed records as read only.

New Panel ‘**04. Addressee**’ has been created to display the ‘Addressee’ value; a corresponding Business Process ‘Addressee’ is now available under the Main Business Process ‘Student Data’ to control user permissions (‘Read’ or ‘Read-Write permission).

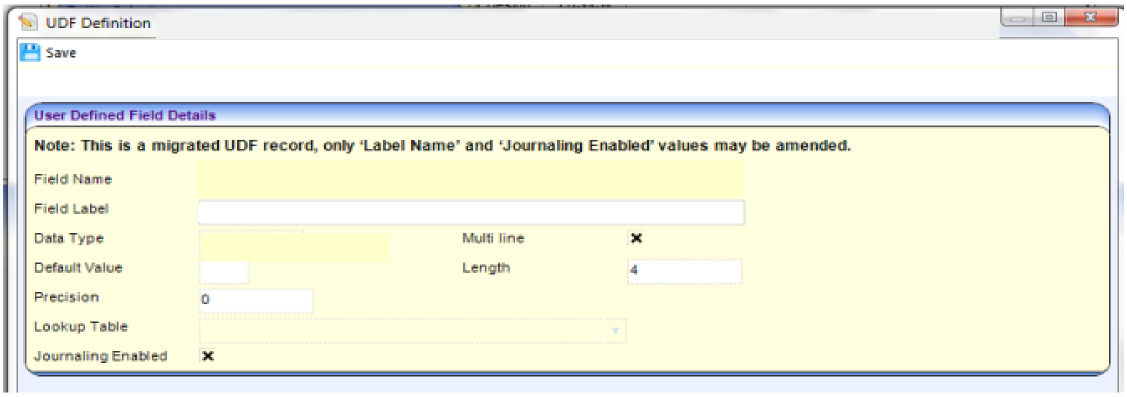


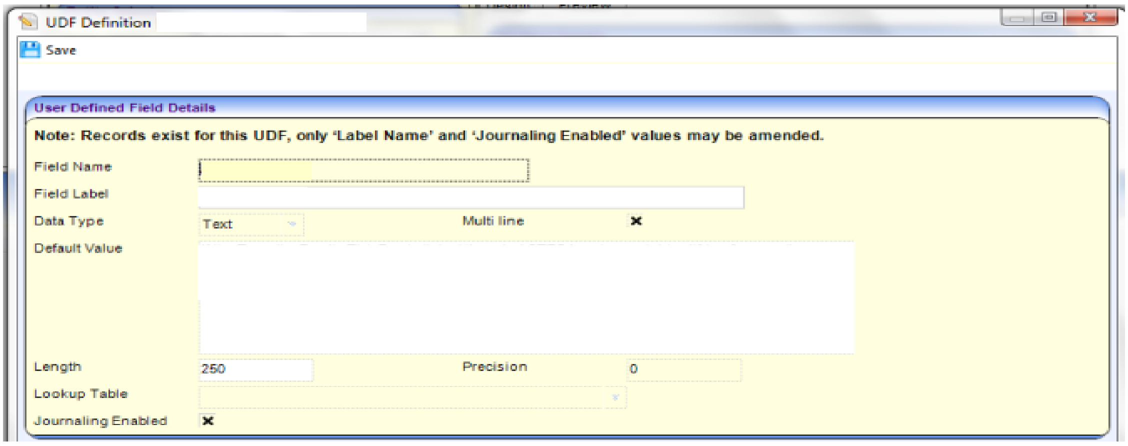
UDF Management

The system did not allow any of the UDF Definition details to be updated where the UDF record had been either migrated from **One** v3 or there were associated records.

In **One** 3.47 for fields ‘Field Label’ and ‘Journaling Enabled’ the values can be updated should either the use of the UDF change or the requirements to audit records change.

Where a UDF was migrated from **One** v3 or there are associated records the ‘UDF Definition’ modal window will be displayed as below:





Improvement on Access Control List Storage

There is a current limitation on the number of Users, Posts, Service Teams and Groups which can be assigned to an ACL record created.

In the **One** 3.47 the storage of ACL information is more efficient to reduce the amount of space required for each entity assigned (Users, Posts etc.) to the ACL and therefore increases the number of entities that can be associated.

A limitation still exists on the maximum number of entities and this has been stated in the table below and delivers an improvement in the flexibility available.

Maximum number of Entities that can be associated in 3.46	Maximum number of Entities that can be associated in 3.47
Users - 58	Users - 121
Posts - 21	Posts - 35
Service Teams - 45	Service Teams - 120
Groups - 56	Groups - 121

We can appreciate that when an ACL is created there may be a mixture of entities rather than just one however we have delivered a dramatic improvement for most entities.

Post upgrade users will still be able to use the system as usual, except the system will now store the ACL information in a more efficient manner.

Student Enquiry / Details screen will respect an ACL set on the Person Record

Previously the system did not respect an ACL created on a 'Person' record when displayed in Student Enquiry / Details screen. A user could also run the 'Student Summary' reports and other items within the 'Links' panel.

In **One** 3.47 where an 'ACL' exists on the 'Person' record the system will now:

- Stop the record from being displayed completely within the Enquiry ('Deny')
- Allow the record to be displayed in 'Student Enquiry' ('Read Summary') ()
- Display an 'ACL' message to the user when accessing the 'Student Summary' reports or other items within the 'Links' panel where 'Read Summary' access has been granted

Functionality for 'ICS Person' Enquiry/Detail screens has NOT been update this was thought to be inappropriate, Children's Services need to have sight of all records.

Resizing Panels on Home Page not Saved

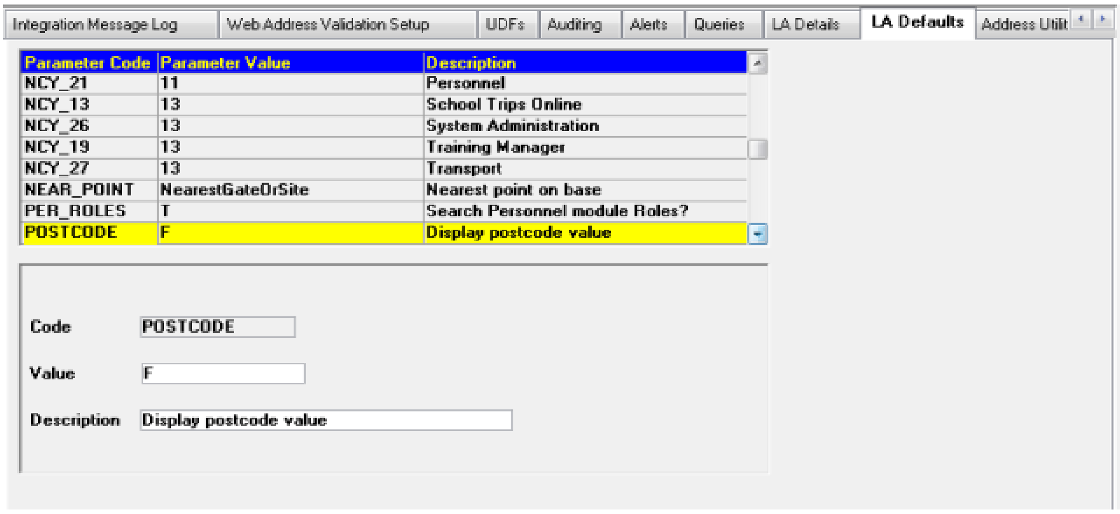
After logging into the v4 Rich Client the 'Home Page' is displayed and the user has the ability to resize or show / hide panels. However, the system did not save the details of how the panels had been resized to the settings for the machine/user upon exiting the client.

In **One** 3.47 the system will now save the size and position of the panels each time the screen is changed and whether they were displayed or not on the 'Home Page'.

New ‘LA Default’ value ‘Postcode’ to control displaying of ‘Postcode’ value

In the v4 Rich Client via menu route Focus | People | Person | Person Enquiry, after performing a person search where the age of the person record is over 19 or the DOB is blank the ‘Postcode’ and ‘DOB’ value is not displayed, customers stated as a result the potential to create duplicate records.

Within the **One** 3.47 release a new default option ‘**Postcode**’ has been created, this can be accessed through **One** v3 | Tools | System Administration | LA Defaults Tab – ‘Postcode’.



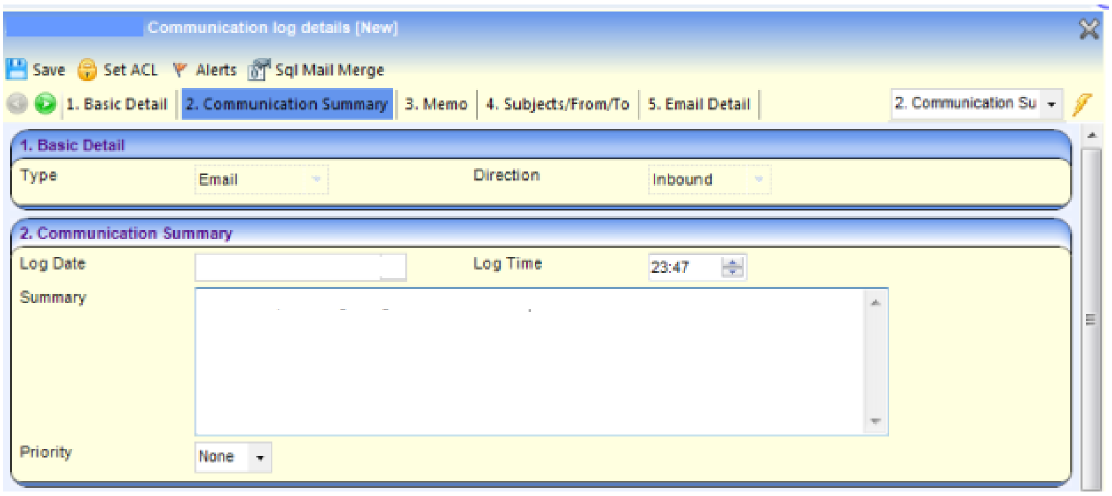
Where the value of the default is ‘**F**’ the system will behave as it does currently and not display the ‘Postcode’ if the DOB is blank or the person is over 19 years or age. Where the value is set to ‘T’ this will allow the ‘Postcode’ value to be displayed and as a result allow users to find people records and therefore reduce the potential number of duplicates created.

Upon upgrading to **One** 3.47 the default value will be set as ‘F’; this means that where it is not appropriate to display the value sites do not need to concern themselves on this impacting on current procedures.

Improvement on fields within the Communication Log

The Communication Log is used to record various types of communication with a variety of people associated with the Subject including the Parent / Carers. However the system did not provide sufficient space to save a log entry in relation to emails.

A number of changes have been made to improve this, together with the ability to view the text entered correctly. The ‘**Summary**’ field has been updated so that where a large amount of text has been entered this will be correctly displayed to the user.



Panel ‘**5 Email Detail**’ has been updated as stated for the ‘Summary’ field above to correctly display all text entered for the Log entry.

The ‘**Body**’ field has an increased limit of 3,000 characters to equal that which can be stored in the memo field so that where an email has been received all the information can be recorded in the Email Detail ‘Body’ panel.

Resolved Defects

1. **KB95324** - When choosing Panel 26 from the drop down menu on the ‘Student Details’ screen the system focuses on the UDF panel instead. The system will now correctly display the selected panel.
2. K**B104585** - V4 Client deployment not downloading and using all DLLs correctly upon first login. After a full investigation into the systems file validation process there was an issue with the client being unable to use the latest DLLs which had been deployed.
   NOTE: The reported issue has been has been corrected but, upon starting the client after the system has been upgraded to **One** 3.47 the client will need to be closed and re-open again. This process only needs to be completed once after the upgrade and once only. Where the v4 Rich Client has been installed from the ‘Smart Client’ download then it is **NOT** necessary to close and re-open the client.
3. **KB101920** – Running Crystal reports within the v4 Rich Client prompts the user for parameters which are marked as inactive within the report. The system has been updated to correctly validate and respect how the report has been setup with regards to inactive parameters.
4. **KB114454** – When scrolling within the User Group Processes – Process Editor window the system would generate an error and the user was forced to either close the window or exit the system; this has now been resolved and the error no longer occurs.
5. **KB109945** – When creating a School History record the v4 Rich Client did not function as per v3 and populate the ‘Days per Week’ value with a default of ‘5’ unless manually changed, this automated function has now been implemented.
6. **KB100827** – User does not have access to this entity [*ACL Name*] when accessing an involvement after a forced password reset. The issue has been fully investigated and after a password reset the system will now function as it should and allow the record to be accessed.
7. **KB91949** – Unable to sort Linked documents as in version 3. The ‘Linked Documents’ panel has been updated and the user can now choose to sort either by ‘File Description’ or ‘File Name.
8. **KB99911** – Unable to open Linked Documents if Open button is hidden. Where the user has chosen to reduce the width of the ‘Linked Documents’ panel this in turn hides the ‘Open’ button. Unfortunately there was no way at this point to open a Linked Document record. The system has been updated to allow the user to double click on a Linked Document record to open it.

9. **KB110342** – Linked file not saved in original location. It has been reported that where a file has been uploaded to the Database, opened, then updated and saved, the system was not uploading the latest version of the file.
   The system has been corrected to upload the updated version of the file. However, an issue that was not resolved due to time constraints was the fact that the 'File name' is changed by the system to where the file was uploaded from when updated, but this does now relate to a directory which exists on the user's machine.
   NOTE: Investigations are on-going at present to not only fully rectify the reported issue but also to implement the loss of functionality between v3 and v4 Rich Client where a Linked Document record cannot be saved as directed to a central network location.
10. **KB115693** - A Role record can be deleted where there are associated people and error ORA-02292: integrity constraint (BRADFRD2.FK_EDP_BUR_EDP_ROLES) violated - child record found is given deleting an EPM role. The system now has the same validation as v3 when it comes to deleting a 'Role' record and will also provide the user with correct validation messages where the record cannot be deleted.
11. **KB89584** - Using the Quick Search for a Base Enquiry twice does not return any results. The system was applying the newly entered search criteria to the records that had been retrieved from the initial enquiry processed. When processing an enquiry the system will now search on the information provided, the 'Quick Search' function has been fully reviewed and all options corrected.
12. **KB110375** - Selecting a caseworker in workload causes error message 'ORA-01427: single-row sub query returns more than one row', where the caseworker is associated with the subject multiple times. The system will now correctly display the information and not produce the reported error.
13. **KB98808** - A 'Category' field appeared when saving a new or existing Communication Log from the student screen, the system should display the 'Category' field depending on the context to which the log entry was related to. This has now been corrected.
14. **KB110214** - Missing field 'Activity Owner' in Activities Enquiry list access from within 'Base Definition'. All impacted areas have been identified and the missing field has been added and the system will now correctly retrieve owner values.
15. **KB109145** - Information entered in the Reference field on the Student Details screen is not being saved when creating a new person. The reported issue has been corrected and the system will now save the value entered in the 'Reference' field on creation of a new person record.
16. **KB87059** - SEN History panel cannot be viewed if student has no SEN data. Previously the system had be designed such that where no history records existed the history panel would not be displayed. With the 'SEN History' panel it has been established that where records are to be added retrospectively the current validation was a hindrance. As a result the 'SEN History' panel will now always be displayed on the 'Student Details' screen.
17. **KB110721** – Expanding the search fields on an enquiry focus would not function to display the fields if the screen size had changed. This has been corrected and the system will always be able to 'Expand' the search fields when required regardless of whether the user has resized the v4 Rich Client screen.
18. **KB114642** – Opening student record produces error 'Object reference not set to an instance of an object' where data panel '23. Former UPN History' panel has been hidden to the user. The system has been corrected to acknowledge that the panel has been hidden and also allows the data panel security information to be updated
19. **KB109573** - Date of birth is not automatically added to a new person record after completing a person search and clicking add
   The date of birth field value now displays date of birth at add person popup.
20. **KB114019 -** SYSv4 Bases table is not showing certain values
   The view LK_BASE_TYPES has been removed in 3.47 to remove confusion when reports are being created.

21. **KB114224** - View LK_COUNTRY_OF_ORIGIN needs to be removed along with any similar views where the lookup is stored in an individual table
    LK_COUNTRY_OF_ORIGIN has been removed as it was un-needed, as described below the table 'COUNTRY_OF_ORIGIN' should be used instead for reporting purposes.
    It has been confirmed that users should be referring directly to the COUNTRY_OF_ORIGIN table for reporting purposes. This is because the lookup referred to as Table ID 1019 held in a dedicated table (COUNTRY_OF_ORIGIN) rather than in the LOOKUPS table.
    Views for lookups held in the general LOOKUPS table are provided to make report writing easier where multiple lookups need to be referred to, however a view is not required where the lookup is held in an individual table. Given this fact the view will be removed from the database along with any similar views which reference the LOOKUPS table when the actual lookups are held elsewhere for that TABLE_ID

System 3.46

System (v4 & online)

1. Further Work on v4 Alert Definition
2. Improved Report Permissions in v4
3. Improvements to Crystal Report Processing in v4
4. Increased Message Length for 'Dangerous Dog' Alert
5. Online Data Shielding Icon
6. Changes to Reports Definition Repository panel

Further Work on v4 Alert Definition

Introduction

We have completed the enhancement of several changes which we began with the March 2011 release regarding Alert processing. The changes now introduced are as follows:

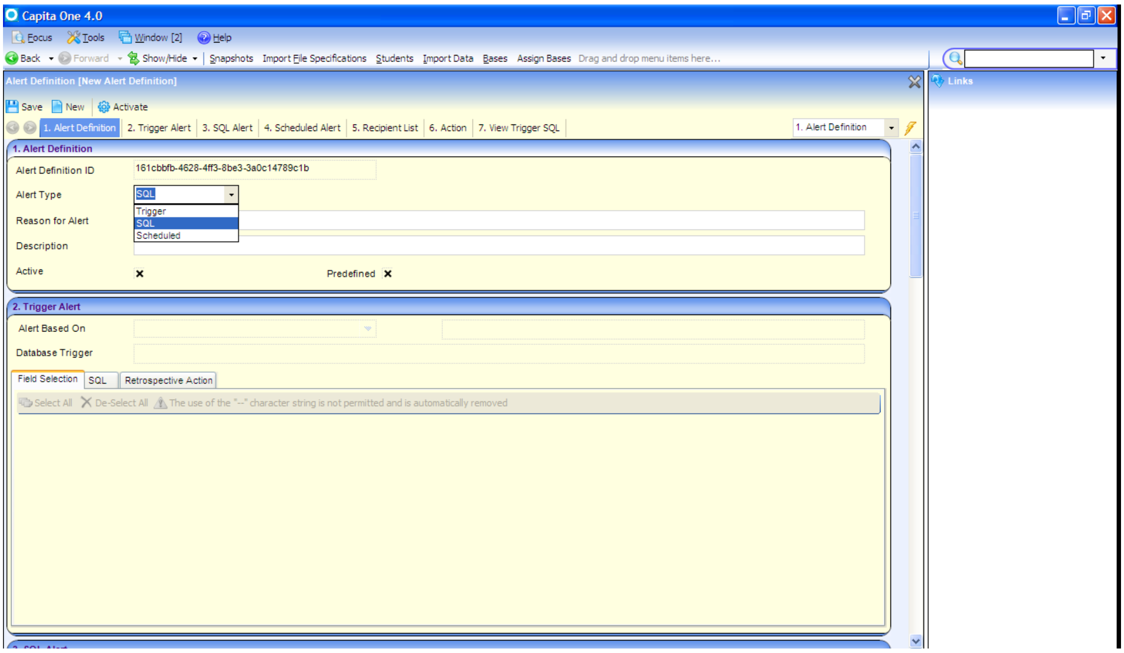
1. The introduction of Scheduled SQL Alerts
2. Frequency of scheduling Alerts
3. An amended Search facility for Alerts
4. The introduction of Multiple Recipients for an Alert
5. The introduction of the (v3) Recipients 'By Query' Alert
6. Amendment of the Soap Alert Action process
7. The introduction of an Alert Error Log
8. Enhanced validation for Alert processing
9. Avoiding Re-presentation of Alerts

The Introduction of Scheduled SQL Alerts

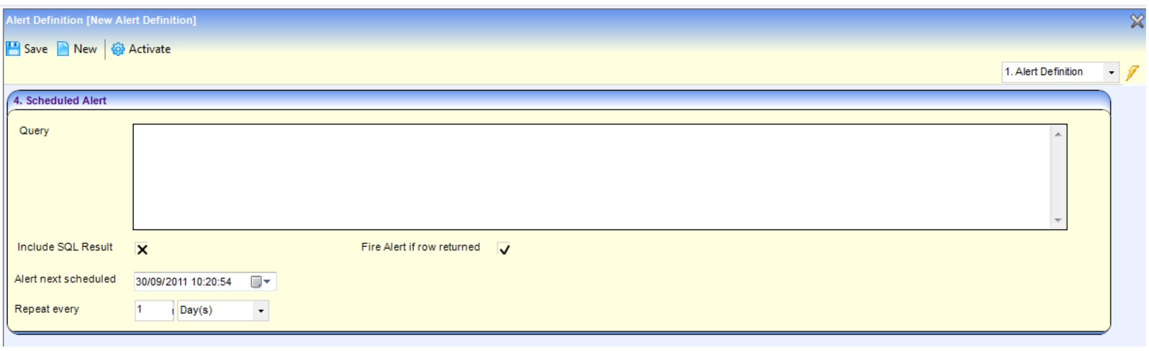
Within this release we have introduced the v3 **Scheduled Alerts** processing to the v4 software. Using this process it is possible to schedule an Alert which can then be delivered as an email and/or Workflow message; these can be sent to either an individual or to multiple recipients (see the section below for details of the new multiple Recipients functionality). Because these Alerts are scheduled it will not possible to issue pop-up messages. In addition, Scheduled Alerts cannot contain parameters in the SQL Query. Unlike other SQL Alerts, Scheduled Alerts do not require the Alert to be linked to a specific entity in the system. As a result of these differences we have created a third Alert Type with its own processing panel. The Alert Type dropdown box therefore now has an Alert type of '**Scheduled**'.

Scheduled Alerts are created from the same area as other Alerts using the 'New' button.

On entry to the Alert Definition screen the Administrator must select the type 'Scheduled' from the drop-down list. Once selected the SQL Query and Trigger Panels are disabled. The Administrator can then navigate to the new Scheduled Alert panel.



To create a new Scheduled Alert the Administrator must add the SQL Query in the same way as they would for a standard SQL Alert with the only difference being that Parameters are not supported for this new type of Alert. In the same way as the other SQL Alerts processes this process will check to ensure that the SQL used is valid SQL and will not introduce a security risk. The two checkboxes for '**Include SQL Result**' and '**Fire Alert if Row Returned**' also work as before.



The Administrator should now record the schedule for firing the Alert. A **Date and Time** selector is available that will default to the System Date and Time plus one hour. The Administrator should change as appropriate.

Once established and running the system updates this in line with the original start date and time and the stated frequency to display the next scheduled time. However, for the moment the Administrator should also record the required frequency.

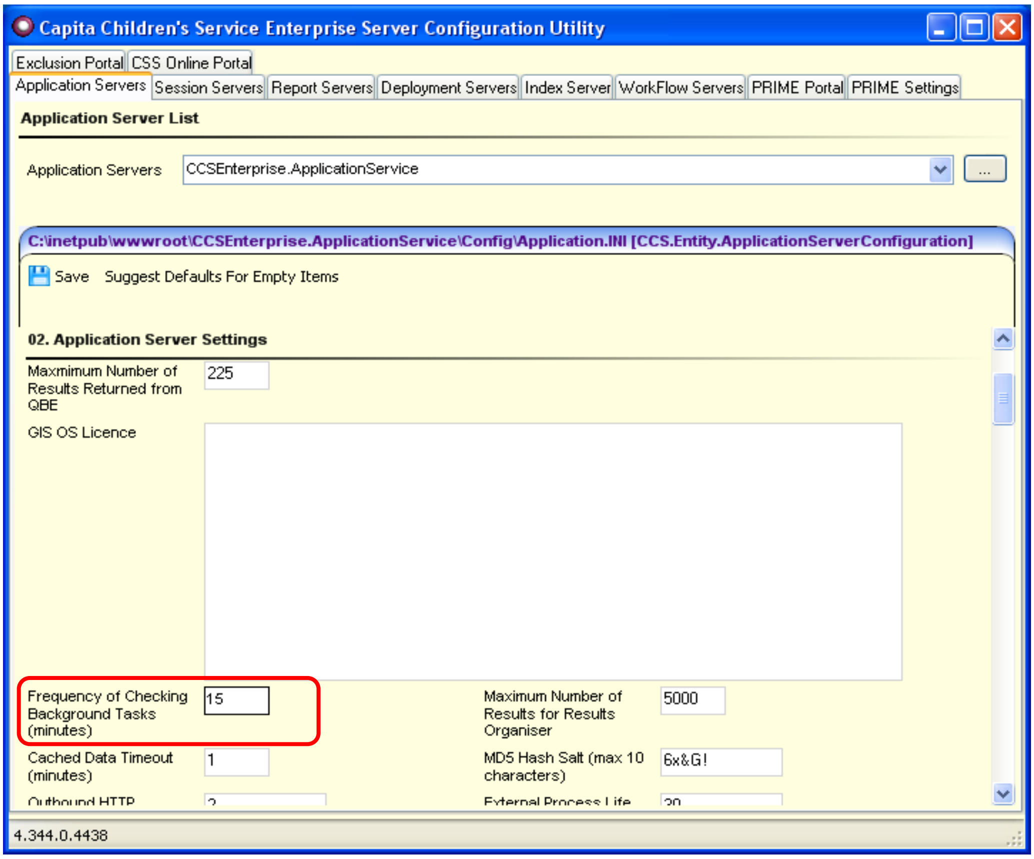
Once the Query is written and the Schedule is set, the Administrator can save the Alert. The system will process other validation routines but it is possible to save at this point even if the Recipients have not yet been recorded. More details on the validation are described below.

Frequency of Scheduling Alerts

The system works by deciding if the system date is greater than the 'Next Scheduled date/time'. When this happens the System then activates the SQL Query and processes the outcome.

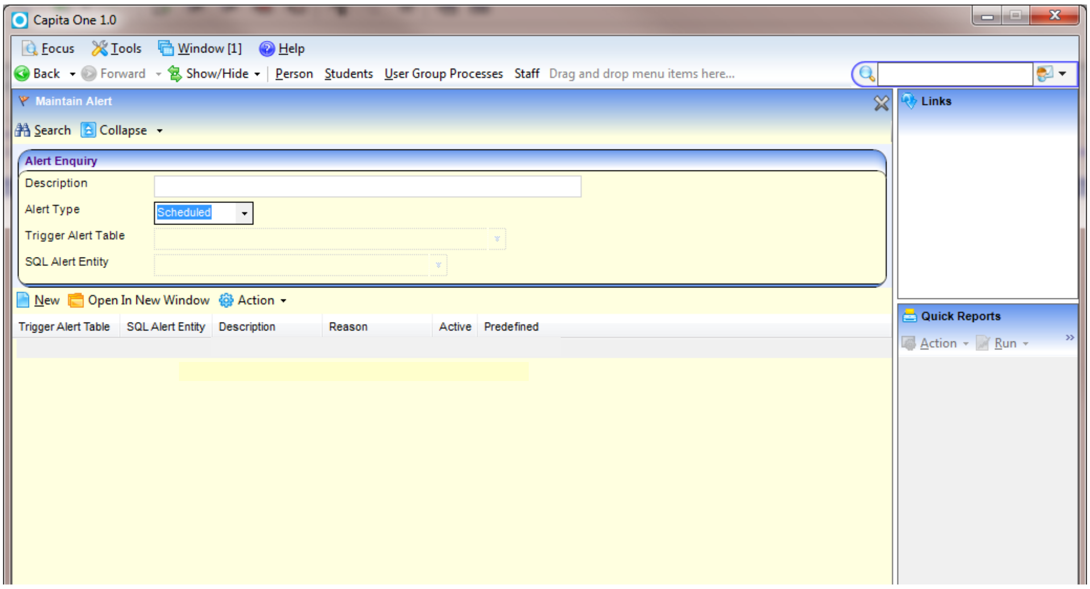
The frequency of the System 'checking' for 'Next Scheduled' times can be at odds with the required frequency of the Alert. For example at its worst an Alert could be set to fire every five minutes. However, the System's job scheduler that determines if any emails are found in the Alert Queue (and therefore, deliver them) might only run every fifteen minutes. In this case a resource is wasted as the Alert Schedule mechanism is not matched by the delivery mechanism.

The Administrator should ensure that the setting for background processing, (which is set in the CCS Enterprise Server Configuration Utility), is set lower than the Scheduled Alert frequency. However, it is anticipated that these types of Alerts are usually fired once per day; in which case this should not be a problem.



The Configuration Tool determines the frequency for processing background tasks. We have linked the Scheduled Alerts to this functionality.

An amended Search Facility for Alerts



In order to find an established scheduled Alert we have amended the Search routine to include the new Alert Type 'Scheduled'. This is accessed from a drop-down list that also includes **SQL**, **Trigger** and **Null**.

Where a Scheduled Alert Type is selected neither the Trigger Alert Table column or the SQL Alert Entity column are populated as these columns do not apply.

The Introduction of Multiple Recipients for an Alert

We have also taken the opportunity to expand the Alerts facility to allow an Administrator to specify the Recipient(s) of all Alert types. The options will change according to the Alert type but basically a single Alert can have multiple Recipients and can be delivered by different methods.

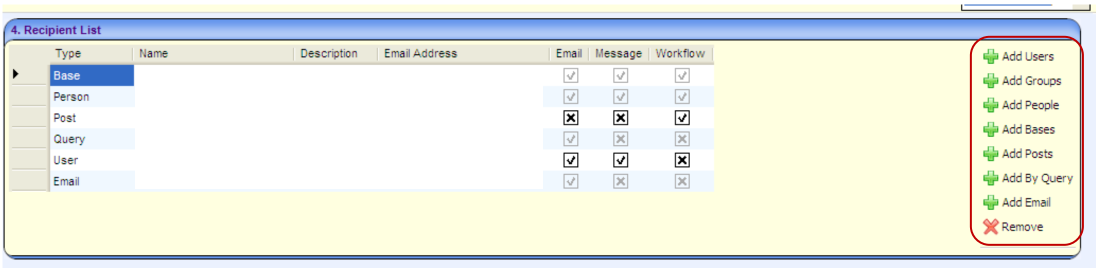
There are effectively three mechanisms for delivering an Alert; these are via **Email**, **Workflow** and **Message Boxes**.

Who can receive an Alert message is determined from a list of potential Recipients; these are:

1. A user account (optionally with an email address on the security users table)
2. A user group (optionally with email addresses on the security users table)
3. People (and students if required) with email addresses
4. Bases
5. Posts
6. Determined by Query (this is the previously established v3 facility)
7. Those with Email addresses who may not necessarily be users of the **One** system.

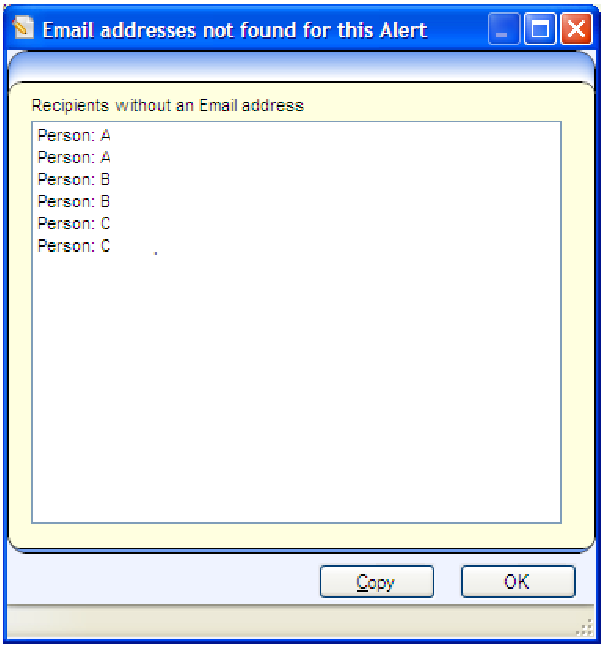
The Administrator should note that the three elements of Alert type, delivery method and potential Recipient type will create combinations that are not compatible. For example, you cannot send an Alert type as a workflow to an email address. Similarly you cannot schedule an Alert and deliver a message box to a base.

To differentiate valid from invalid options the Recipient list (illustrated below) either enables a checkbox (one for each type) or disables the checkbox. In certain cases a checkbox may be 'ticked' but disabled indicating this will happen or it will be 'crossed' and disabled indicating an invalid option. In other cases the checkbox may be enabled with no preference set, allowing the Administrator to make the appropriate choice.



The panel allows the Administrator to select a Recipient Type and (if appropriate) the Action Type (Email, Message or Workflow). Other options allow the Administrator to select an option or all options (such as Post or User). With this introduction it is now no longer necessary to select the Action Type as previously and we have thus removed the check-box option.

On migration any existing email addresses or Posts/Users will be displayed in this panel.



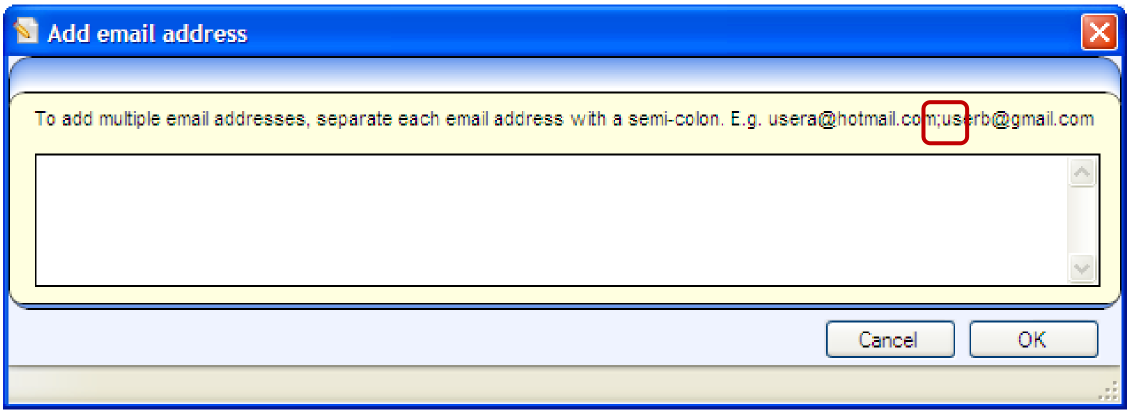
Users might have noted that in the panel above the email address for the Base 'Abbeymead Primary School' is not displayed. This is because at the point of screen capture the Alert has not been saved. Once the Alert is saved the email address will be retrieved (and displayed). If the email address is not available or recorded the Administrator will be given a warning, but the Alert can still be saved. In other cases the email address is not retrieved by the System until the Administrator selects 'Save'. This mechanism avoids the potential recall of thousands of email addresses in anticipation of potential selection and instead only retrieves the email address when the Administrator saves the Alert.

The system will display Recipients as 'one' per row. However, groups and posts are not expanded to display individual membership.

It is also possible that a User may be a Recipient of an email by virtue of Group membership and by nomination as a User. In this instance the System will only despatch the email once as the System filters out any repeated email addresses.

The selection of email addresses continues with the v4 facility previously available (although not in v3) that allowed the Administrator simply to add an email address without further validation. The Administrator may now add several email addresses that are stored in a database field that is capable of recording several thousand email addresses against one Alert.

However, the Administrator should consider that whilst the dialogue box (displayed below) is capable of accepting such a large number; it is not envisaged that this will be used to add large number of email addresses and it is recommended that this is kept to as low a number as possible and that users are encouraged to utilise email addresses already recorded in the software where ever possible.



To add multiple-email addresses each address must be separated by a semi-colon delimiter (**;**).

In the 'Popup Message' area of the Action panel we have added a new option of 'Show to all Users'. This option is set to a default of 'cross' or False. By setting this to true, the Administrator may select a Message Box Alert action but need not nominate any Users or Groups in the Recipient panel.

Adding People and Users who subsequently become Inactive

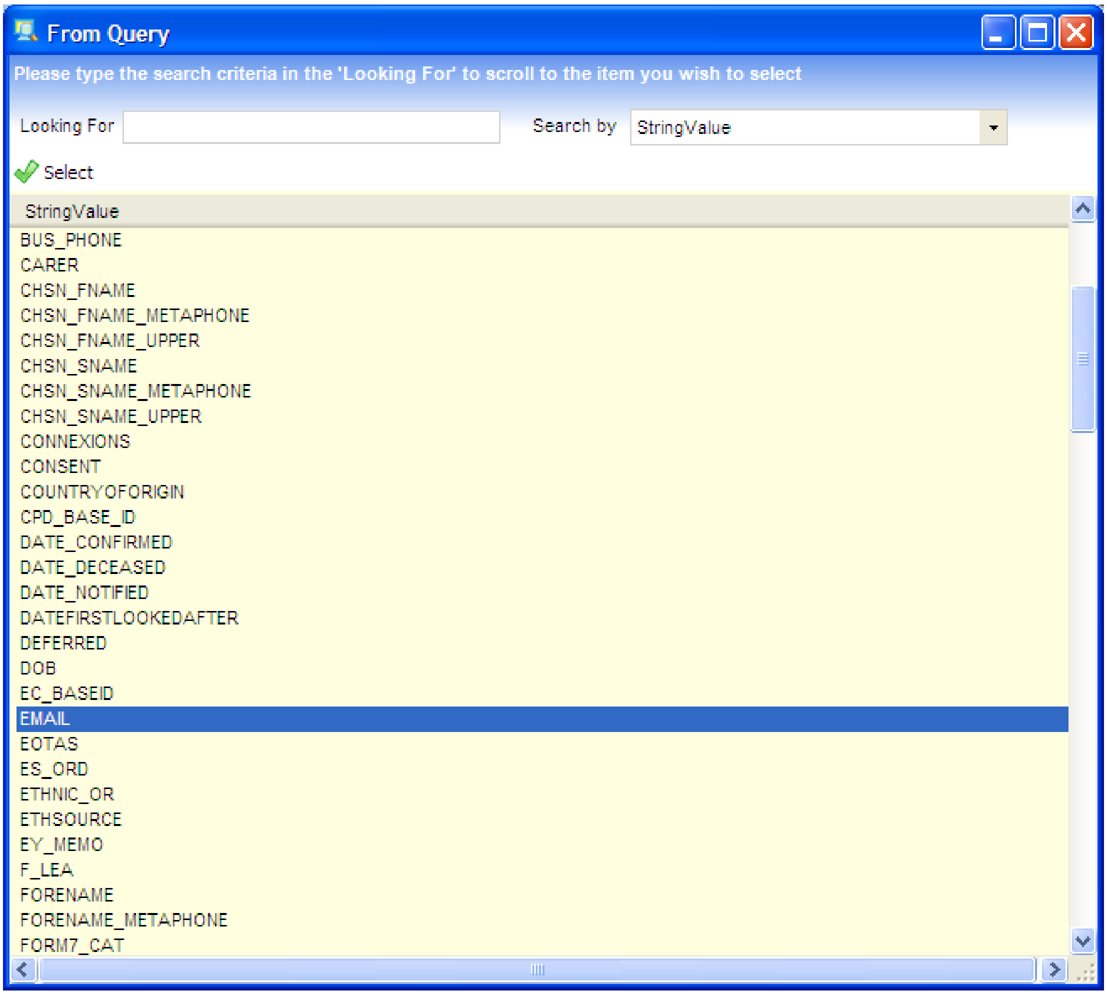
It is quite possible that the Administrator may select a person or User who subsequently becomes 'Inactive'. When this happens the individual will not receive an email as the System checks for 'inactivity' before an Alert is fired and will treat this scenario as an error. The Administrator is advised to regularly view the Error log where warnings are provided of this occurring.

The introduction of the (v3) Recipients 'Add by Query' Alerts

We have added the functionality to create an SQL or Scheduled Alert which determines the Recipients when the Query is run. This functionality currently exists in v3 and typically, this is used where the population alters according to Query Output. For example, it might be necessary to identify bases that have not made a return or individuals who have tasks overdue. Here you might not know who should be sent the email until the system has run the query and the list can be made.

Whenever the Administrator needs to create an Alert with a Recipient of 'Add by Query' this has to be done by stating the query first. In other words you cannot simply navigate to the Recipient panel and click on the 'Add by Query' button. This will cause the system to display an error message. It therefore follows that the process must be followed in a sensible order.

However, once the Query has been stated the 'Add by Query' button may be selected. The System reads the Query and identifies the appropriate table(s). At this point the Administrator is required to read from the display list and select the field that identifies the email address. In the example below the Bases table appears in the Query:



Therefore, the Administrator should now select the 'Email' field. This will now appear in the Recipient list as 'Query', 'EMAIL' and 'From Query'.

Amendment of the Soap Alert Action Process

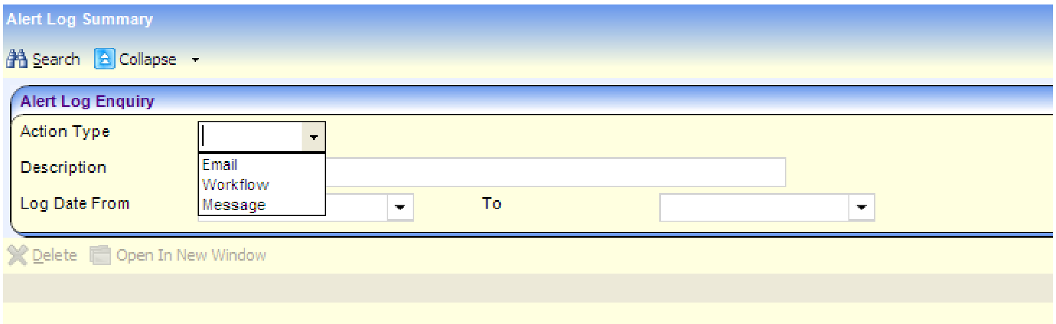
We have temporarily disabled the 'Soap Message' Action Type for an Alert Definition pending an investigation by the Systems' project team. Accordingly, we would be pleased to hear from any customers who might wish to explore this option.

The Introduction of an Alert Error Log

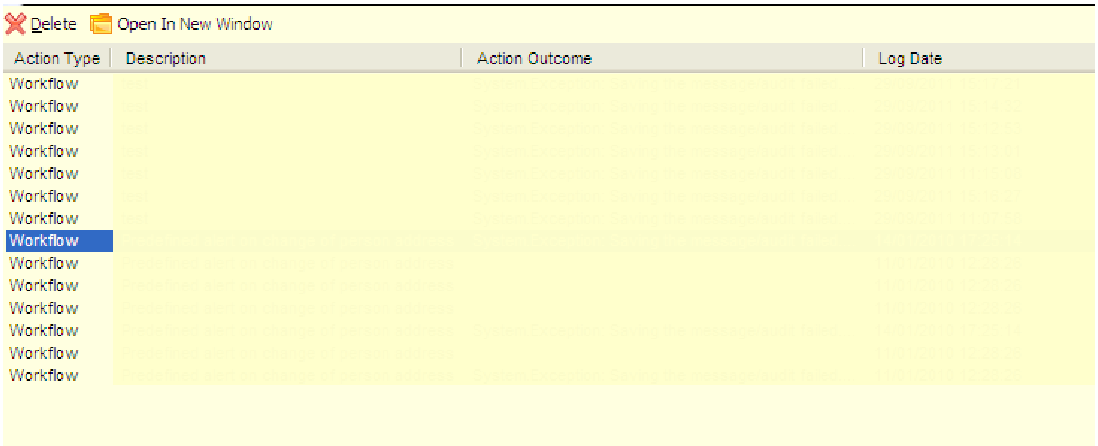
We have provided a new function to analyse **Alert Errors**, this should help determine why the system was not able to despatch emails and workflows as required. This facility is found at Tools | Administration | Alert Log. So that users can access this area we have mirrored the permissions set for access to the Alert definition focus. Hence it is not necessary to provide users with additional permissions to view and edit this log.

There are three main functions associated with this log:

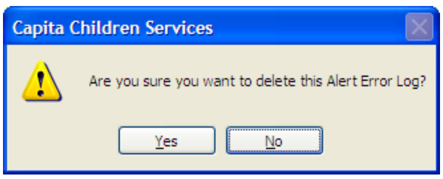
1. A summary level display of errors with the ability to drill down to investigate further the error.
2. The function to print the detail.
3. The ability to remove the Error Log entry.



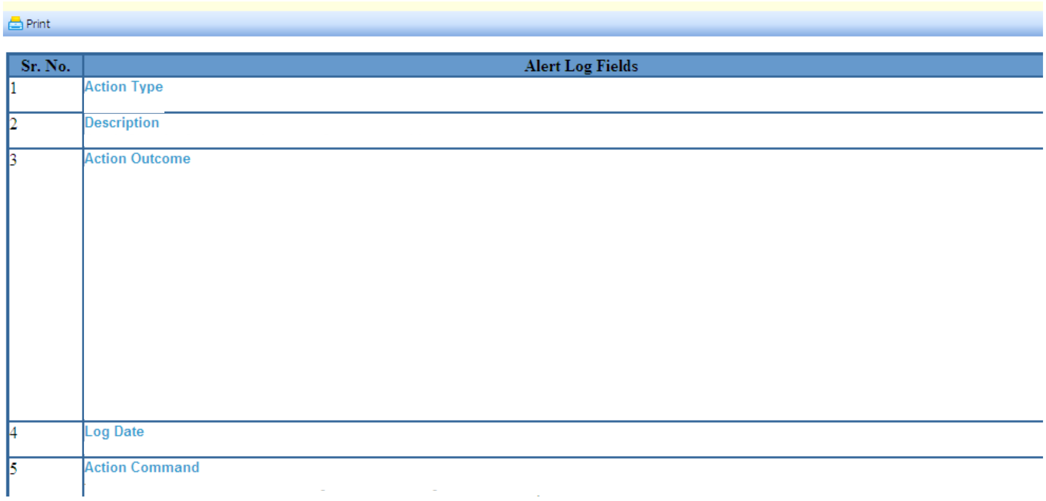
The Alert Log Summary also provides a function to search for Email, Workflow or Message errors. In addition, there is a facility to filter the errors by Date and Description. If an 'Action Type' is selected a description may also be written which creates a join treated as an 'And' not an 'Or'.



When the system returns records the list may be sorted by any column in ascending or descending order. Once the Administrator selects any record this may be deleted, in which case a warning is provided:



Alternatively the record may be opened in a new window:



We have also added a **Print** facility which it is hoped will aid diagnostics.

Enhanced Validation for Alert Processing

We recognise that in several instances it is possible to draft an Alert before the Alert is ready to be activated.

We have, therefore, introduced a series of validation routines that provide warnings where information is missing, such as Recipients, but nonetheless allow the Alert to be saved. However, in most cases the Alert may not be activated as by doing so the System could not carry out the required process and might 'hang' with unexpected results and delay.

A basic concept of validation is the matching of Alert Types to Recipients, as mentioned above; validation ensures that it is not possible to despatch a Message Box to Recipients where a Scheduled Alert has been created. In this instance we have disabled the check-box that determines the Recipient Type as Message Box, but it is not always possible to disable check-boxes in such a manner.

As part of the basic validation the following rules apply before a Scheduled Alert can be saved:

1. The Reason for the Alert must be stated.
2. The Description must be provided.
3. The Query follows the same validation as the SQL Alert Query already coded, i.e. the Query must begin with the word 'Select'.
4. The Query does not contain any run-time Parameters.

The following will also apply in order to activate a Scheduled Alert:

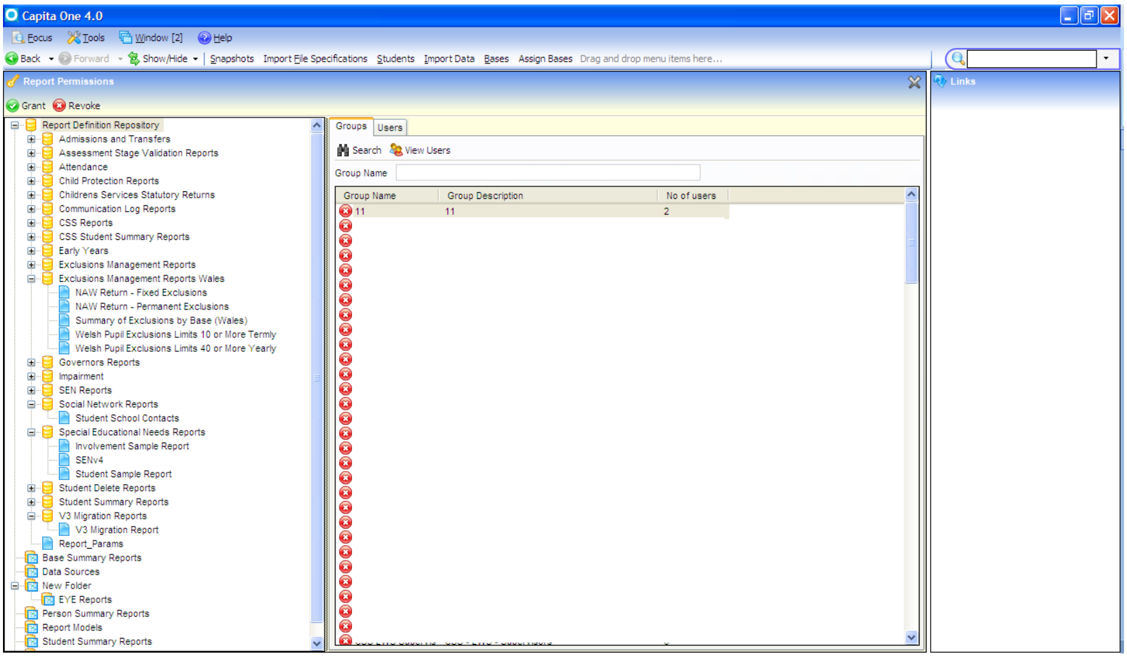
1. The Alert must be saved.
2. The Query area must not be blank.
3. There must be at least one Recipient.
4. For a Message Box the message cannot be blank or the 'Include SQL result' checkbox must be set to True.

Avoiding Re-presentation of Alerts

We have amended the process where Users were re-presented with Alert messages when the User saved a record. This did not apply to all areas, but happened in Student, People and Early Years and arose as a result of data retrieval from the database when refreshing the User interface.

Improved Report Permissions in v4

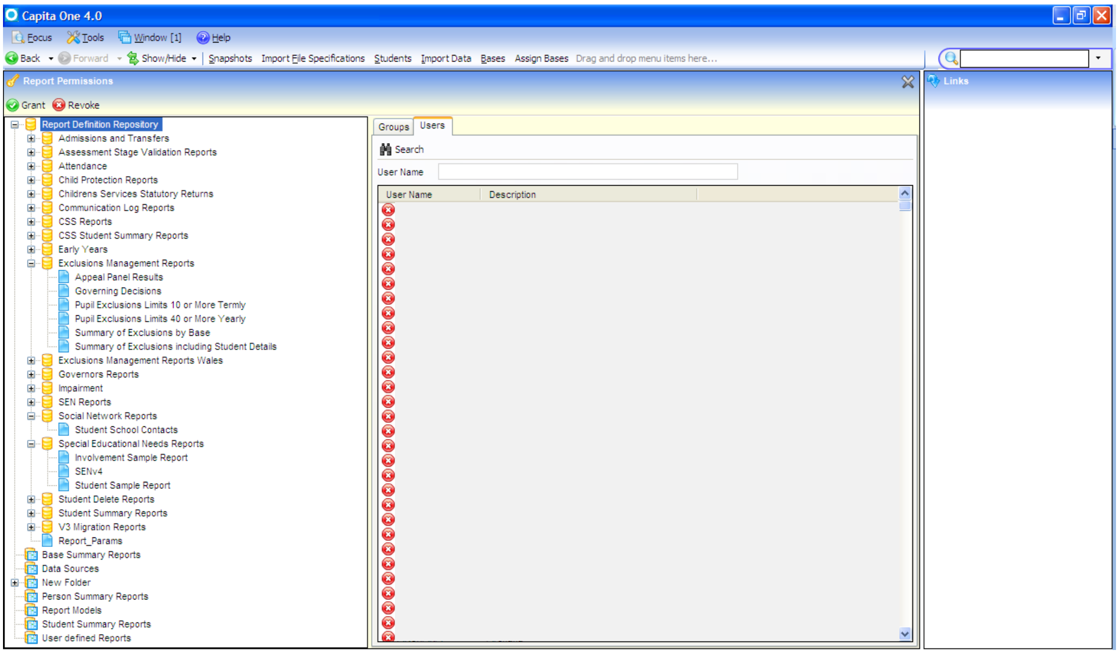
To allow administrators greater control over report running we have increased the scope of the Report Permissions with this release. Up to this point it was only possible to link a User Group to a folder for viewing Reports saved on the Report Server and available for viewing in v4. The increased scope now allows the System Administrator to determine not only which folders and the Reports contained within that the User Group may view, but this has also been extended to User level.



It is now possible to grant Group or individual user access to an individual folder and the Reports within the folder. The Administrator selects either the folder or an individual Report in the folder and then selects the User Group or the User and by selecting the '**Grant**' button, the System will then grant privileges as appropriate. If the Administrator grants access to a folder, then all Reports within the folder are automatically granted. However, the Administrator can 'revoke' an individual report. In this instance the single Report is not available to the Group or to the User.

Please note that sub-folders must be treated as though they are folders in their own right. The 'cascading' process does not apply to sub-folders when access to a parent folder is granted. However, when a folder is revoked all Reports in the folder and all sub-folders are revoked.

In a similar manner the same process applies for Users:



The Administrator should note that the User/User Group privileges are not interdependent. If a User is granted access to a Report or folder which is not available to that individual's group, the User will still have access. The System is not built on denial; i.e. the User will gain access to a Report anywhere that privilege has been granted to that individual.

Improvements to Crystal Report Processing in v4

We have introduced the following changes designed to improve reporting using Crystal Reports, these are:

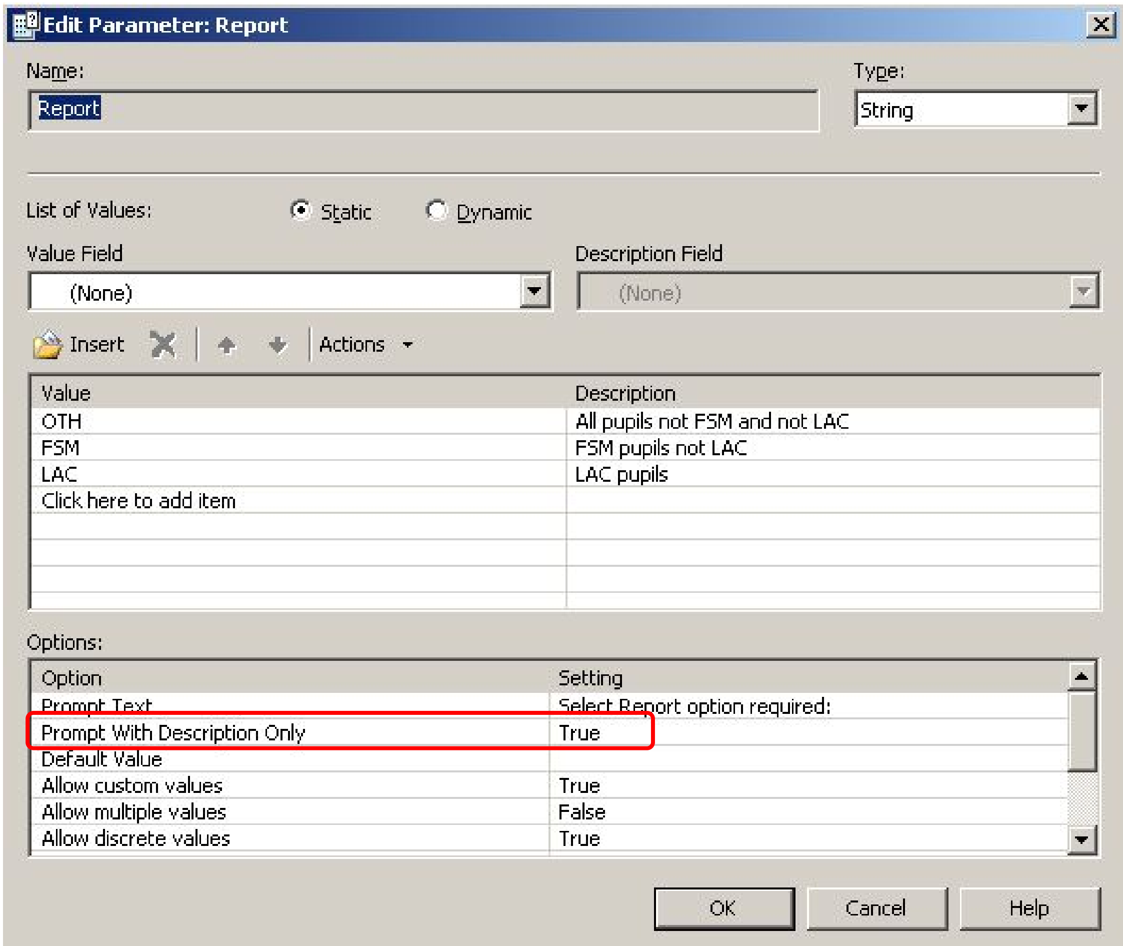
1. Linked Report Parameter Prompts
2. Parameter Description
3. Non-Display of Default Values
4. Range Parameters
5. Multiple Parameter Paging
6. Custom Values

Linked Report Parameter Prompts

Previously in v3 the System recognised Crystal Reports that contained parameters additional to the parameter provided by context, for example Stud_Id, in this case the System would prompt the User for the missing Parameter value(s). We have rectified this with the issue of this release.

Parameter Description

Previously when a user ran a report from the Reports screen in v4 (Focus | Analysis Reporting | Report) the Description field for a Parameter was not displayed even though the Report had been designed to display Parameter Descriptions only:

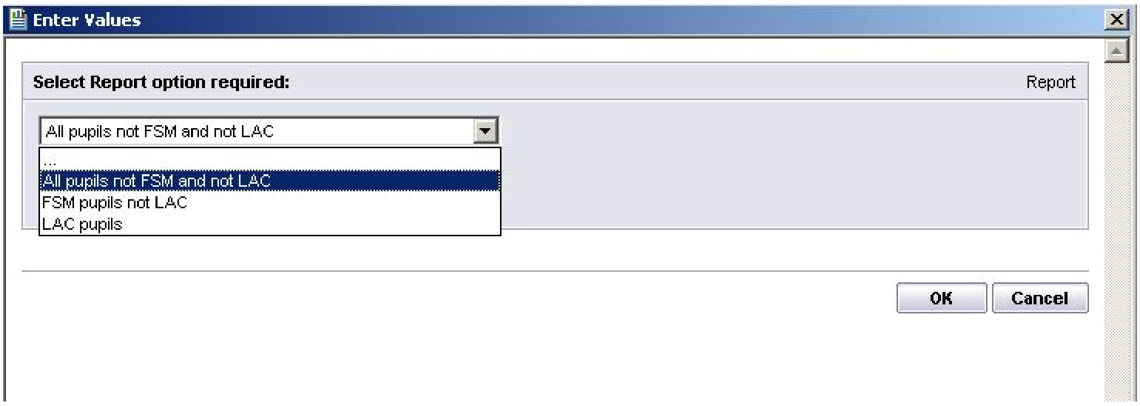


Crystal Reports – Parameter Definition Screen

Note, in the Options section, the option to prompt with Description only was set to True.

When the Report executed in **One** v4 (Reports screen) the User was prompted with a list of **Parameter Values** to select from:

However, when the Report ran in Crystal, the User was prompted to select from a list of Parameter Descriptions (as expected):



This error has now been rectified.

Non-Display of Default Values

Within Crystal Reports it is not possible to display default values for input fields. Unfortunately, we have not been able to rectify this error as this is a known error with SAP (who owns the product). On behalf of all customers we have lodged a formal request for rectification. We await developments.

Range Parameters

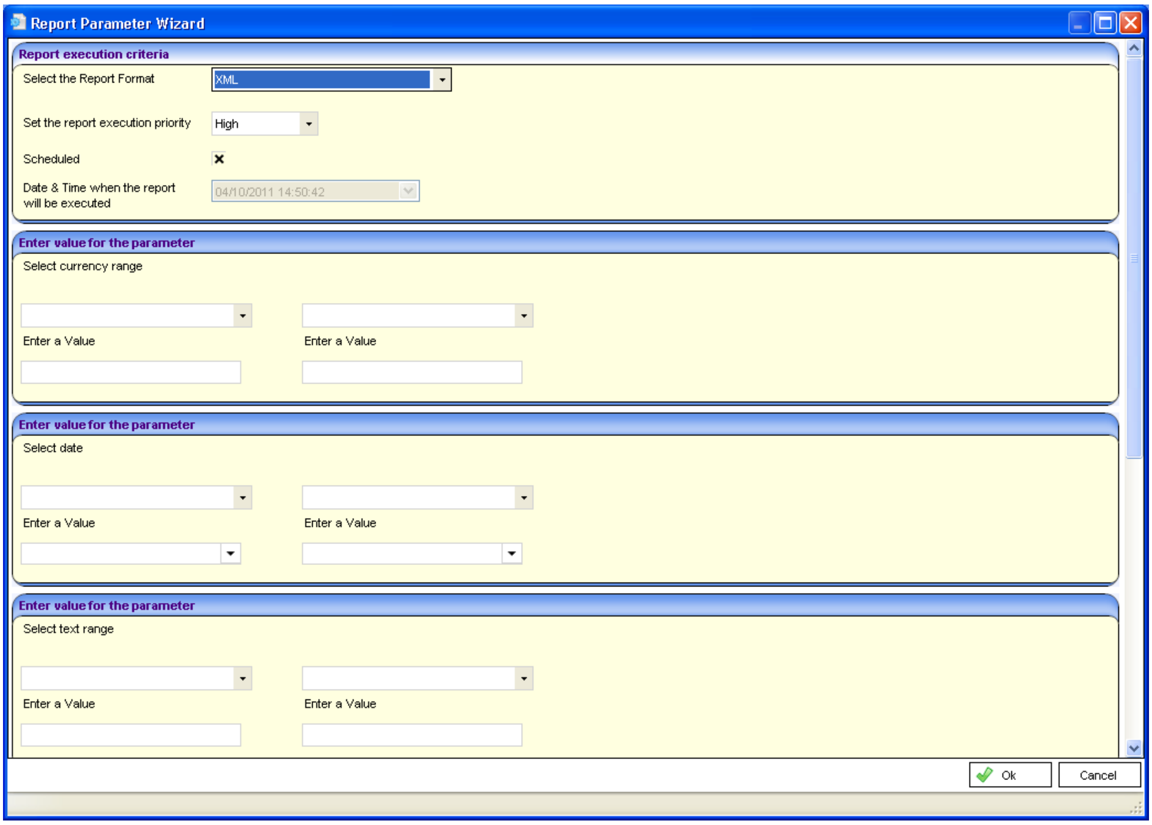
Sometimes a report was created which required the User to input two dates. For example a DOB date range as 'from' and 'to'. When run through '**One**' it was not possible to select two dates for the same field. Thus data could not be filtered to a Date range. This has been rectified and can be seen in the example below in Multiple Range Parameters.

Custom Values

Under certain circumstances the System generated an error when running a Report after the User had provided a Parameter value: "Input string is not in a correct format". This has been rectified.

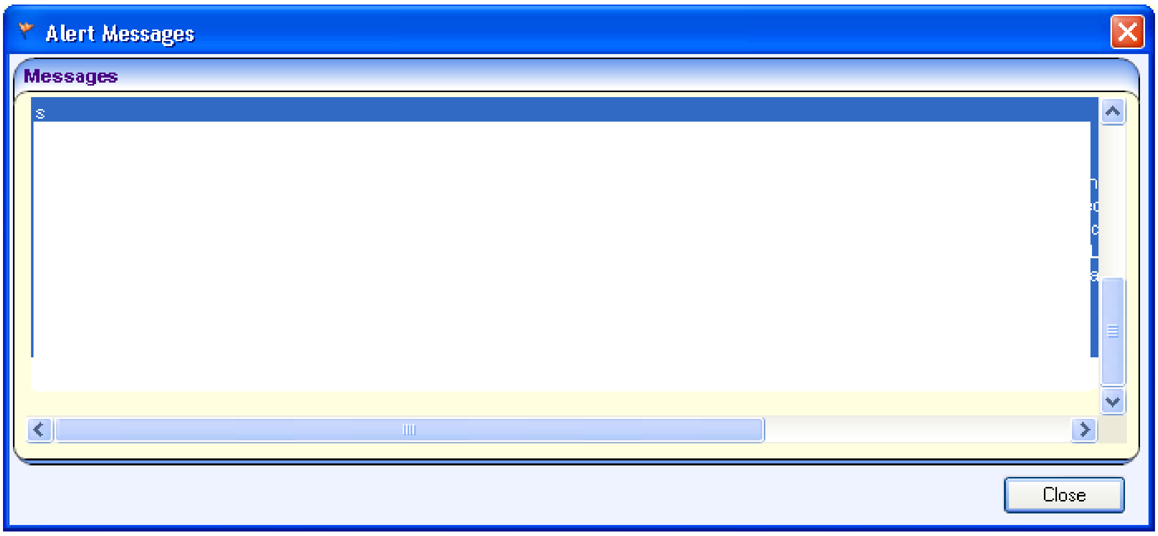
Multiple Parameter Paging

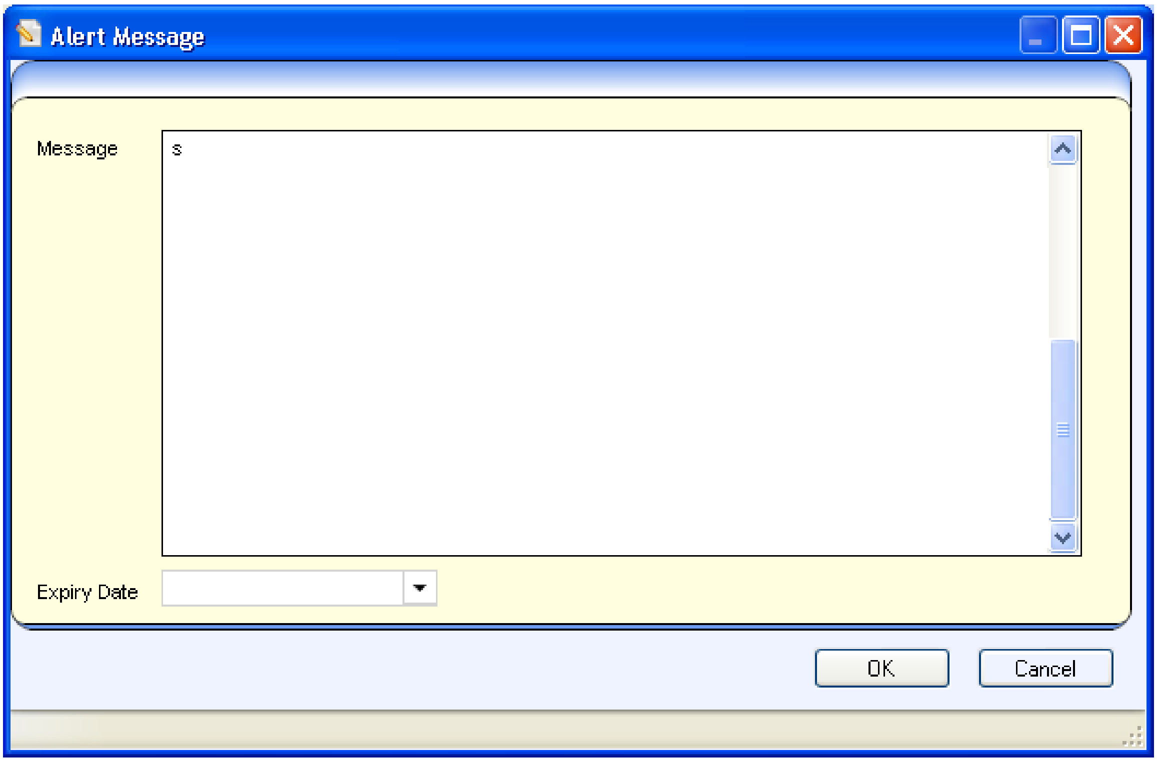
Previously Crystal Report Parameters appeared on multiple screens rather than on one screen as per v3. We have rectified this issue with this release:



Increased Message Length for 'Dangerous Dog' Alert

As part of a customer request we have increased the message length for a Dangerous Dog Alert to 1,000 characters from 255:

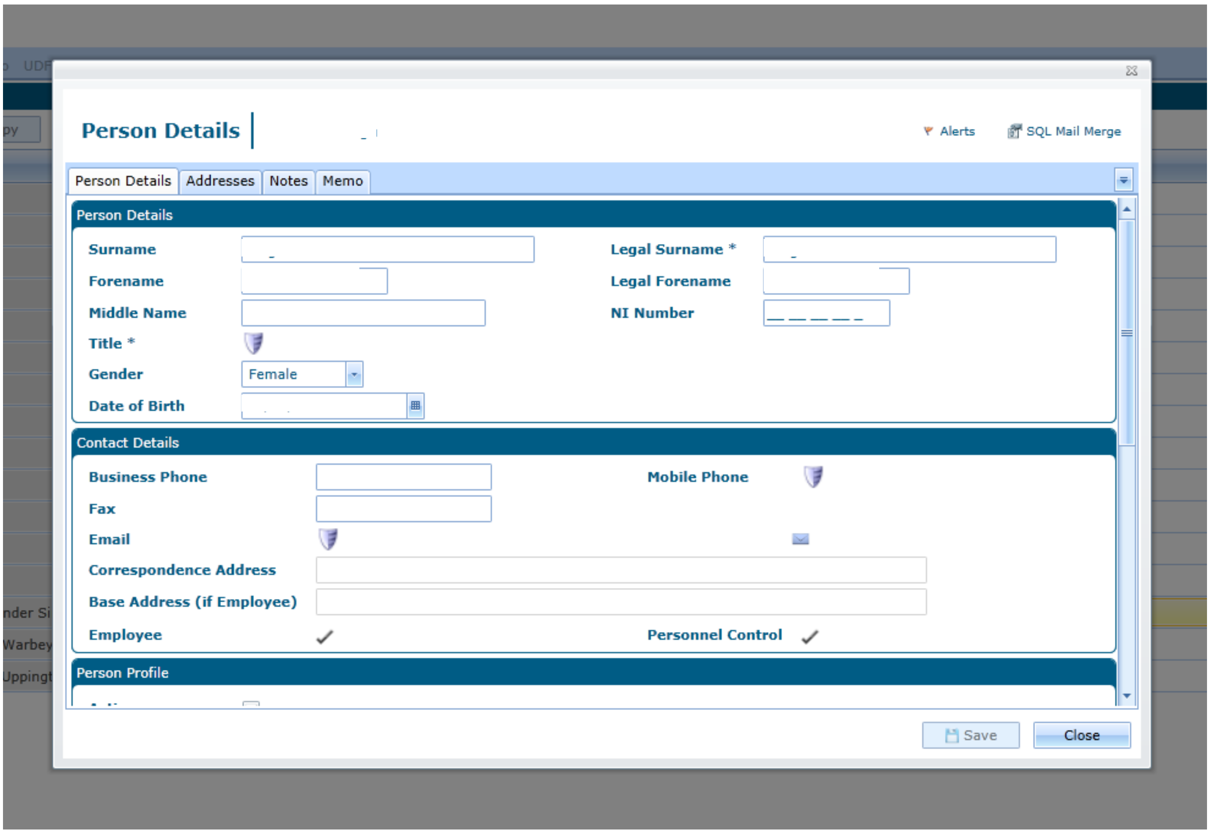




This is the 'Edit' text box where the message is created. (This is also similar in **One** online).

Online Data Shielding Icon

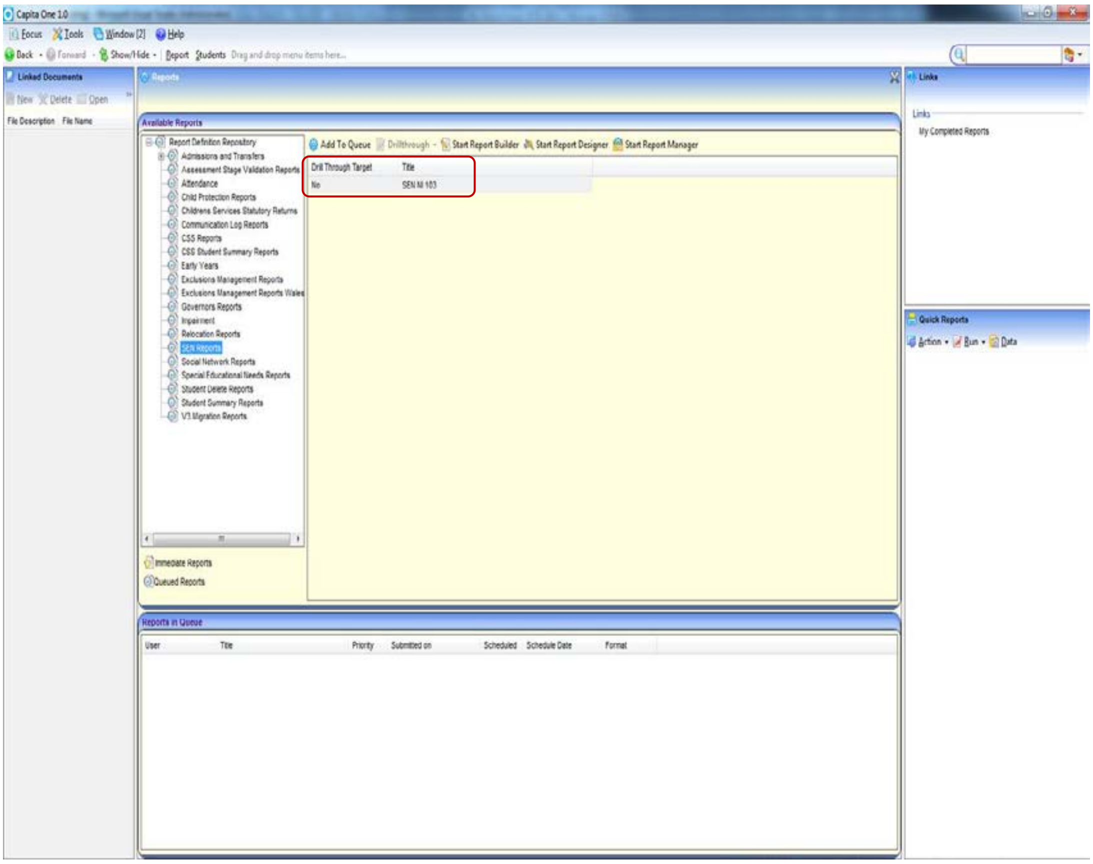
We have introduced an online **Data Shielding** icon. For customers with the Personnel module it is possible to shield certain data items for Employees. This ensures that confidential data is not seen by other Users where this is deemed inappropriate for their work. Up to this release online modules did respect data shielding but, unlike v4 Client, it was not obvious that the data had been shielded. We have now rectified this whereby online Users will see a shield to indicate the data is deliberately hidden.



Changes to Report Definition Repository

In Focus | Analysis Reporting | **Reports**, some columns have been removed from the screen in relation to the performance issue covered in **KB115154**. The columns removed are Subject, Description and Estimated Time. The Reports are now listed under **Drill Through Target** and **Title**.

These columns and their population will be re-added in a future release via **KB98203**.



System 3.45

System (v3)

ORACLE Client Version

*As part of the **One** 3.45 release the minimum supported **Oracle** client version for the **v3 software** is **Oracle 11g**. There is therefore a need to modify the **ems.ini file** in the EMS directory on each client machine using this software. This is not possible through the upgrade process, therefore we would ask that you request each **v3 user** to follow the following steps:*

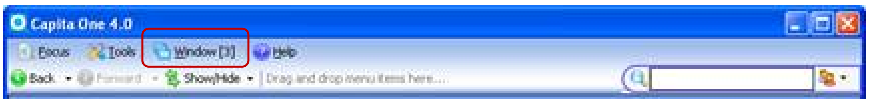
1. *Navigate to the EMS directory on the PC*
2. *Open the **ems.ini** file using WordPad or Notepad*
3. *Replace the line DBMS=O10 Oracle10g (10.1.0) in the file with **DBMS=ORA Oracle***
4. ***Save** the changes and close the ems.ini file*
5. *Log into v3 as normal.*

*If following this change users are experiencing issues with accessing the **v3** software then please log a case with the **One** Service Desk.*

System (v4 client & v4 online)

Window

Throughout the System the **Window** button will now display how many windows/pages you have open.



Having too many windows open at a time can reduce performance.

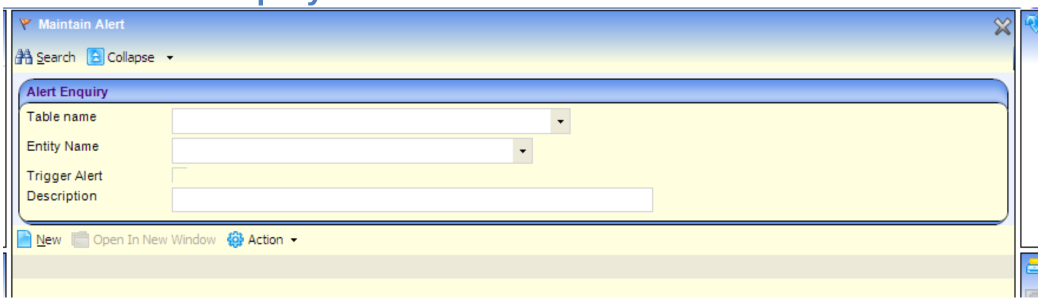
Alerts

This information was originally included in the One 3.43 release, but has been modified.

Previously there was only one method for Alerts in **One v4**. This method relies on changes to nominated database tables and fields. The generic term for this type of functionality is 'Database Triggers'.

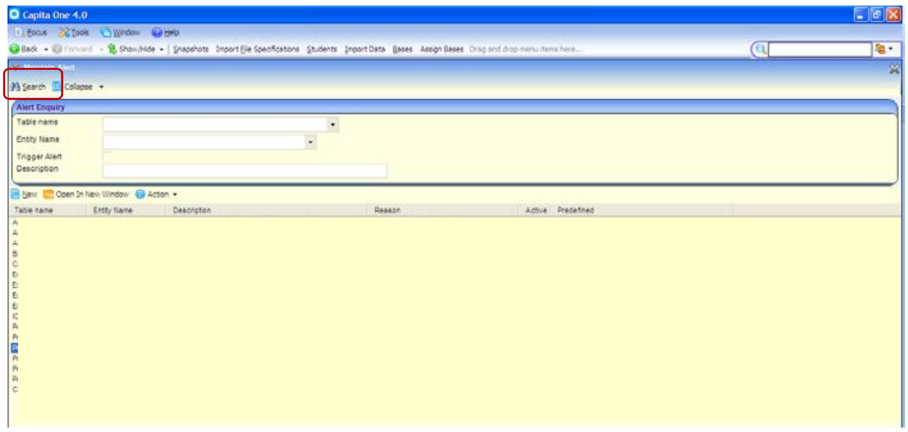
We are now introducing a second method of processing Alerts in **One v4**. These Alerts are not created on the basis of database field changes but are created and initiated on the basis of a user enquiry to a particular focus. For example, a user may select an option to view the details of a student. As a result of this enquiry the system initiates an SQL statement run against the database and the result output to a message box, email or workflow. This new type of Alert is referred to as an SQL Alert. This introduces the level of functionality to the **One** software; this was previously available in the v3 software.

The Maintain Alert Enquiry Screen

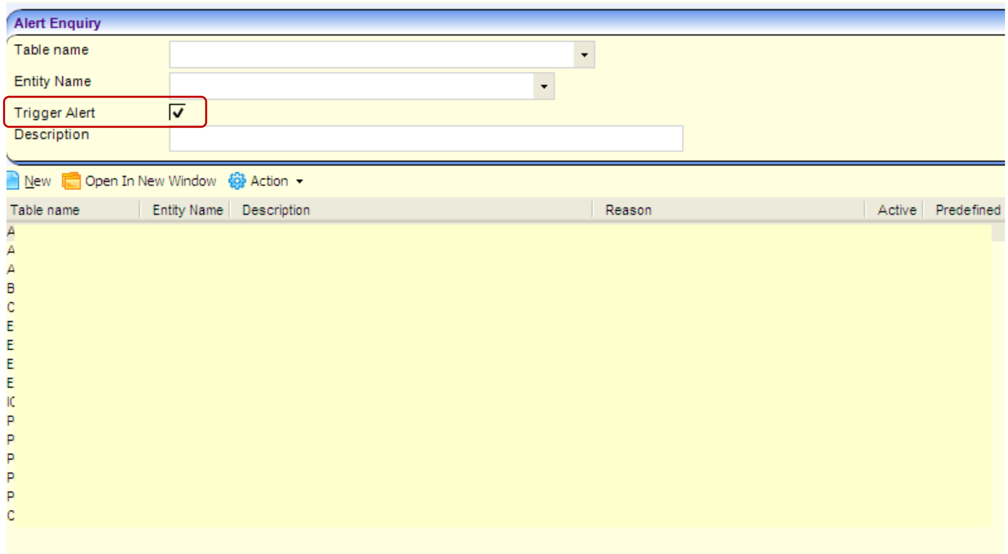


Administration for the new Alert type begins in the **Maintain Alert Enquiry** screen. The user (who must have System Administration rights) should navigate to Tools | Administration | Alert Definition where the screen illustrated above is displayed.

By selecting '**Search**' only, all values are returned:

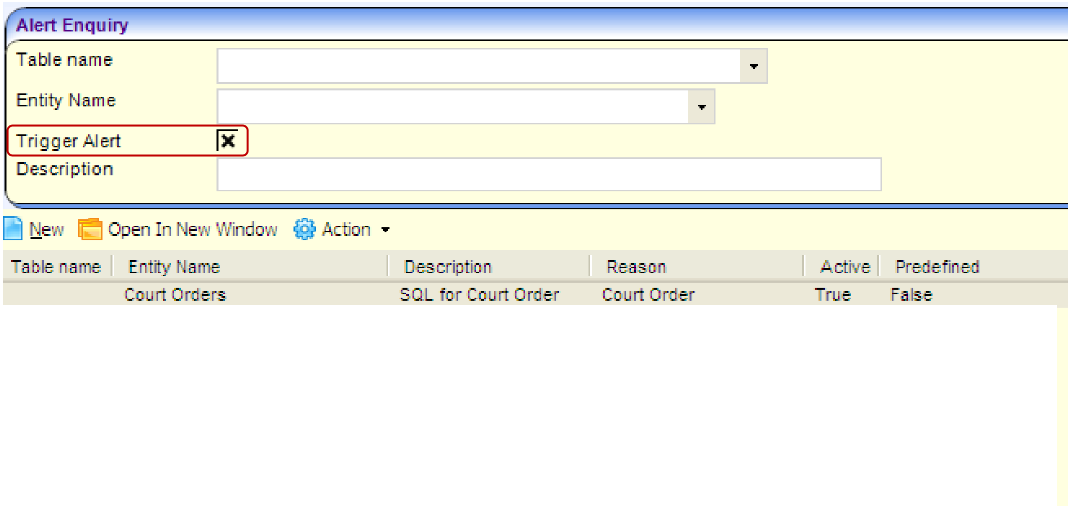


The '**Trigger Alert**' may be selected:



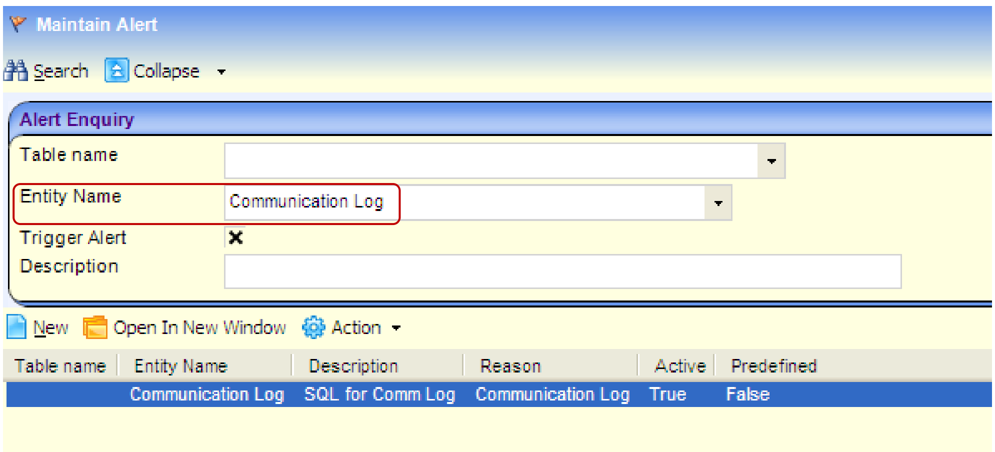
In this instance Alerts based on database changes are selected.

These Alerts may be specifically excluded by placing a cross in the checkbox:



In this instance all SQL Alerts are selected.

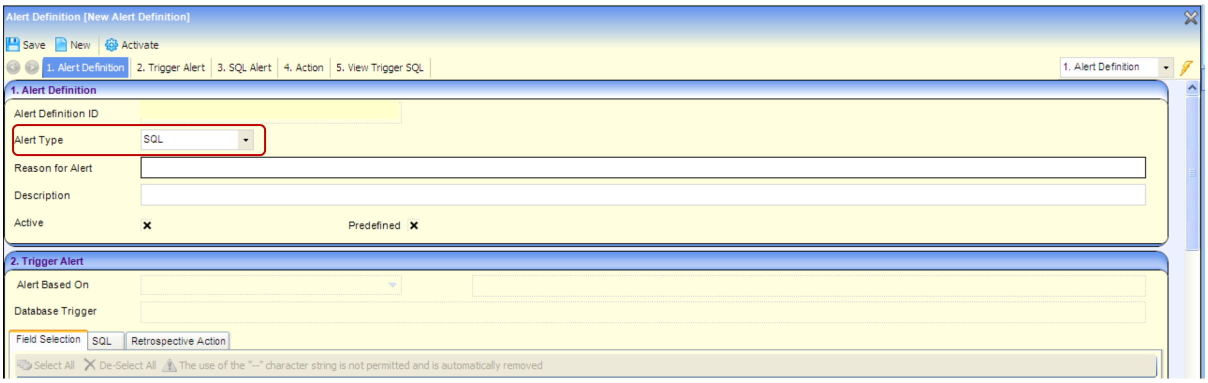
It is also possible to search for individual tables (Trigger Alerts) or Entities (SQL Alerts):



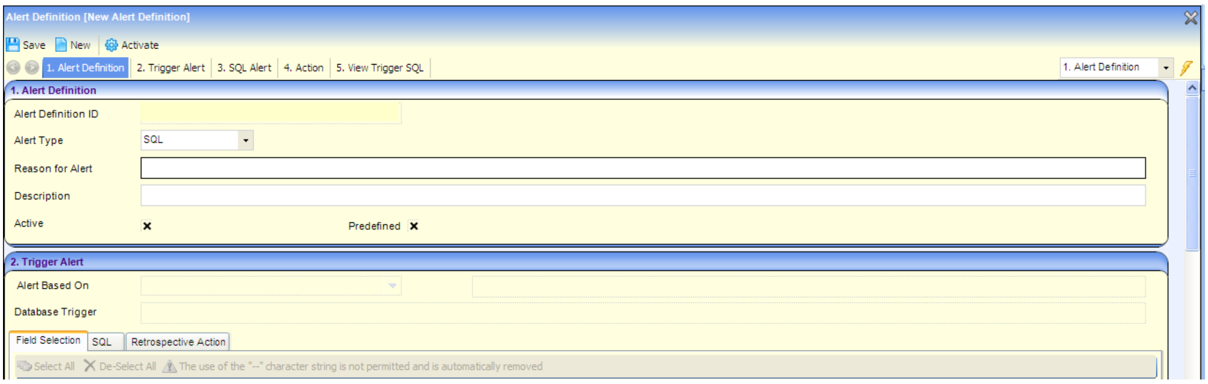
Editing or Creating an Alert

Once an existing Alert has been selected or the user has elected to create a new Alert, users should note that the same panels are used to create both database (Trigger) Alerts and SQL Alerts; however certain fields have been moved. In Panel 1 'Alert Definition' the fields '**Alerts Based On**' and the related (read-only) table name have been moved to the 'Trigger Alert' panel. This is to reflect that Trigger Alerts are only concerned with changes to tables. Other than this there are no changes to this (second) panel.

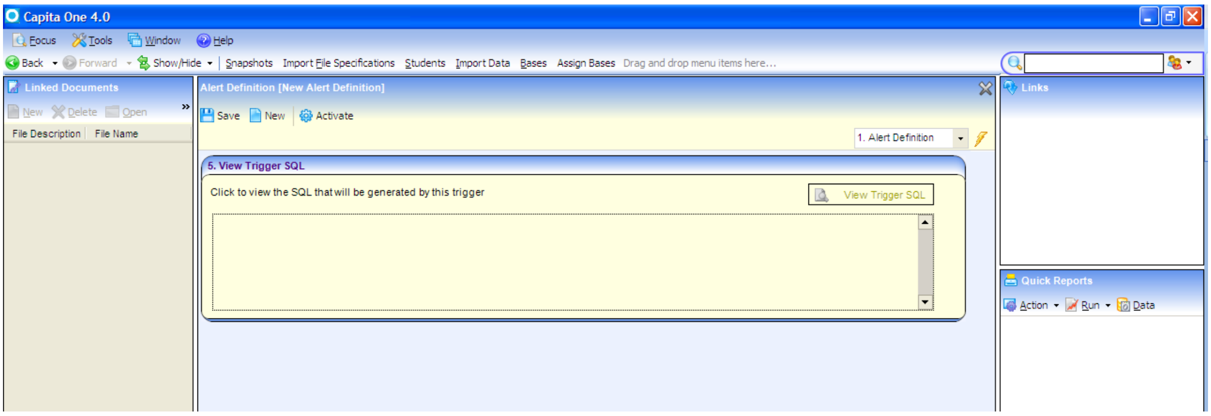
The '**Alert Definition**' panel now contains a new drop-down list allowing the user to select the type of Alert (currently a database trigger or an SQL trigger). Once a selection is made certain panels are disabled to reflect the type of selection made.



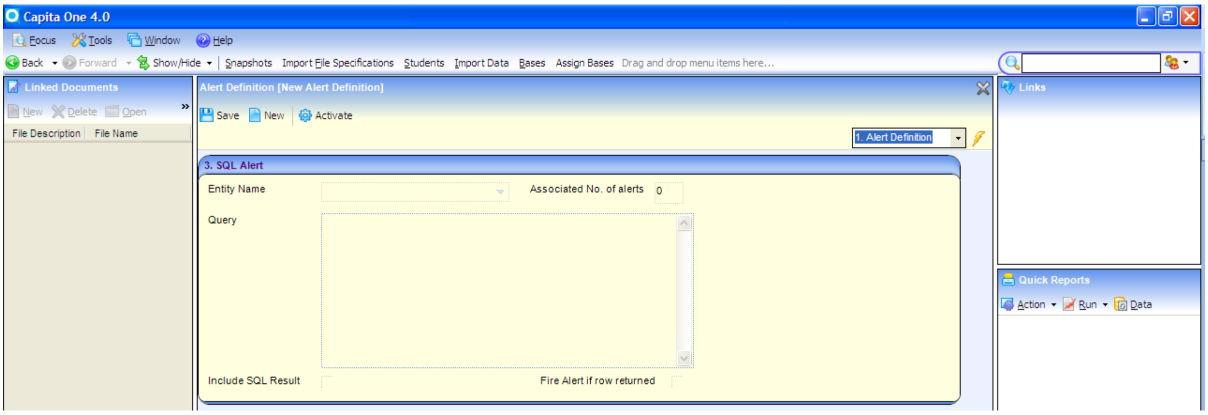
A new 'Alert Type' field is populated by using the drop-down list. Currently there are two Alert Types: **SQL** and **Trigger**. By default the list is set to 'SQL', in this state the second panel, 'Trigger Alert', is disabled. Alternatively if the Trigger Alert is selected the new panel 3 is disabled.



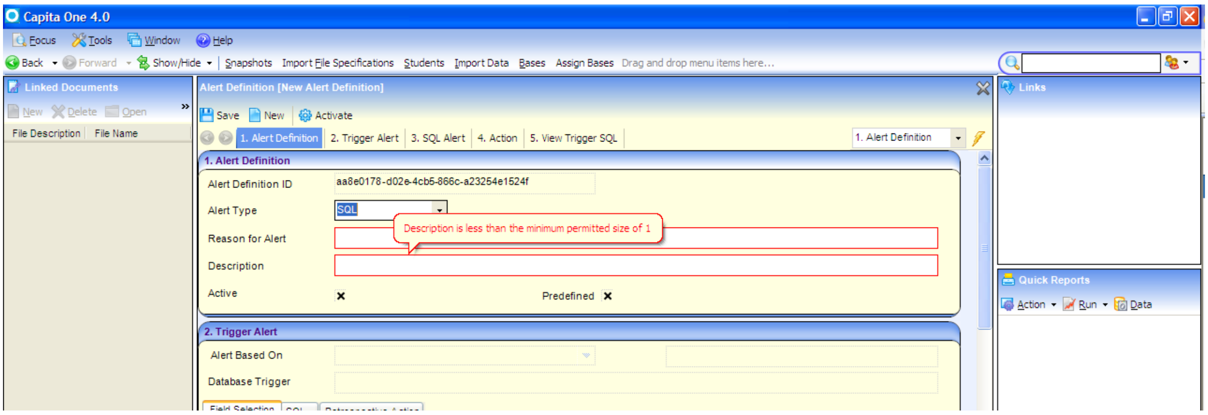
These screen shots display the two Alert options available when creating a new Alert.
Where an SQL Alert is selected the **View Trigger SQL** panel is disabled:



Where a Trigger Alert is selected the **SQL Alert** panel is disabled:

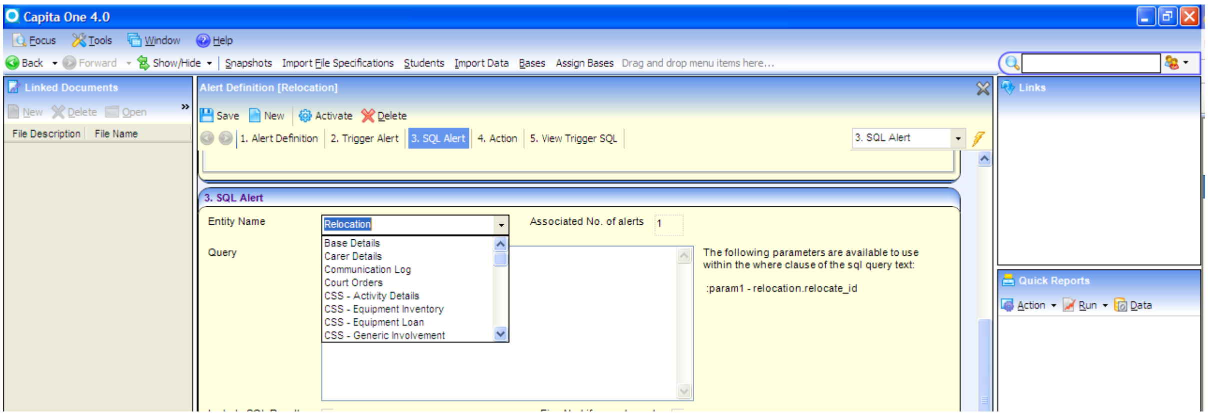


Once the user selects the SQL option it is necessary to add a **Reason for the Alert** and a Description. If the user omits to add a Description an error message appears '*Description is less than the minimum permitted size of 1*'. The system will continue to display this message until the user adds a Description and saves the record for the first time.



(The error message (as above) will remain until the user saves the record.)

A drop-down list allows the user to select the **Entity Name** appropriate to the Alert:



A new panel now allows the user to create the SQL for the Alert. However, the user must select the Entity Name for the Alert (as above). Once this is selected the system carries out the following:

1. The **number of associated Alerts** is displayed. (Please note this facility has its own web permission which must be set by the System Administrator, if the privilege is devolved to non-system administrators).
2. The **list of parameters** associated with the Entity is displayed. Parameters simply allow the user to prefix an SQL statement with a value that the system will populate, dependent on the record accessed by the user at run-time.

This screen shot displays both the 'Associated No. of alerts' and the parameters relevant to the entity (in this example Bases)

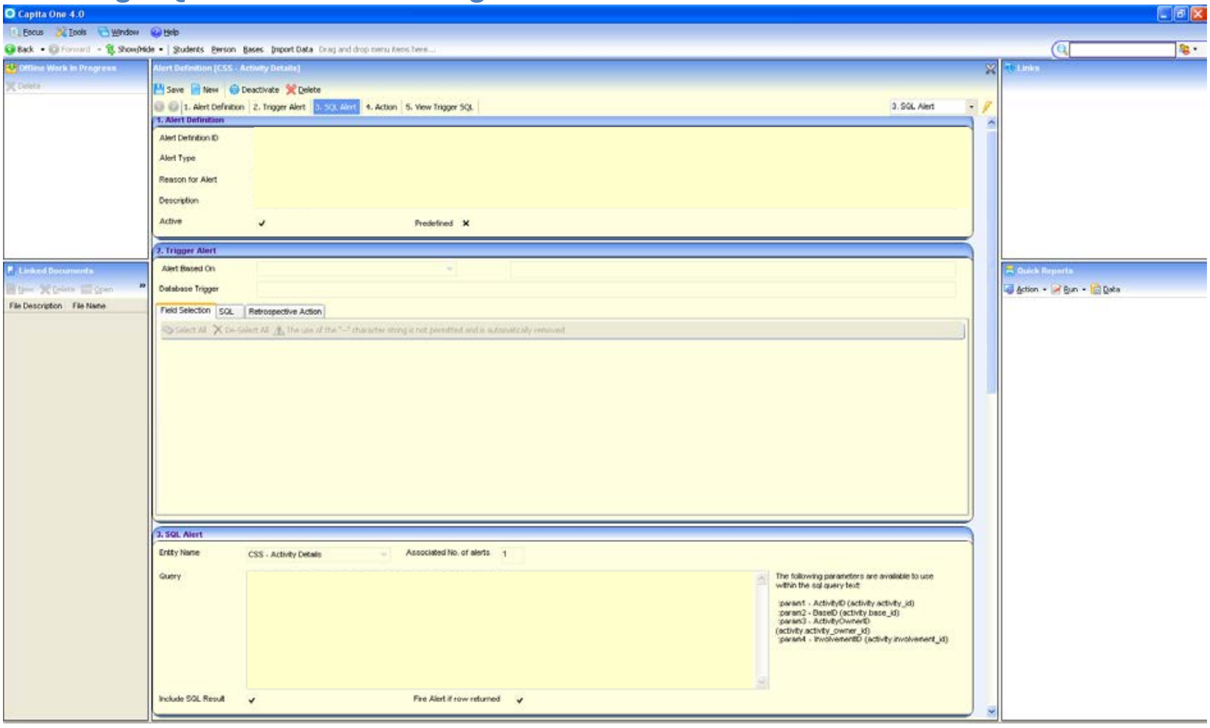
The user may now populate the **Query** box with the SQL statement required. Two additional check boxes are provided: '**Include SQL Result**' and '**Fire Alert if Row Returned**'. Both boxes are three-state (tick, cross and null), these represent Accept, Reject and Null respectively.

The first box merely allows the repetition of the SQL output in a message and by default this is set to ☒ Reject). **Please note**: it is not valid to end an SQL Statement with a semi-colon or a forward slash.

The second check box allows the user to determine if a message should fire if no row of data is returned. The default value is set to ☑Accept. This implies that the message will fire regardless of the values returned. Should the user prefer this value can be set to Reject in which the message will fire regardless of the outcome of the query.

In addition, it is not possible to edit an existing Alert unless the Alert is **deactivated**. Equally, a saved Alert will not 'work' until it is **activated**.

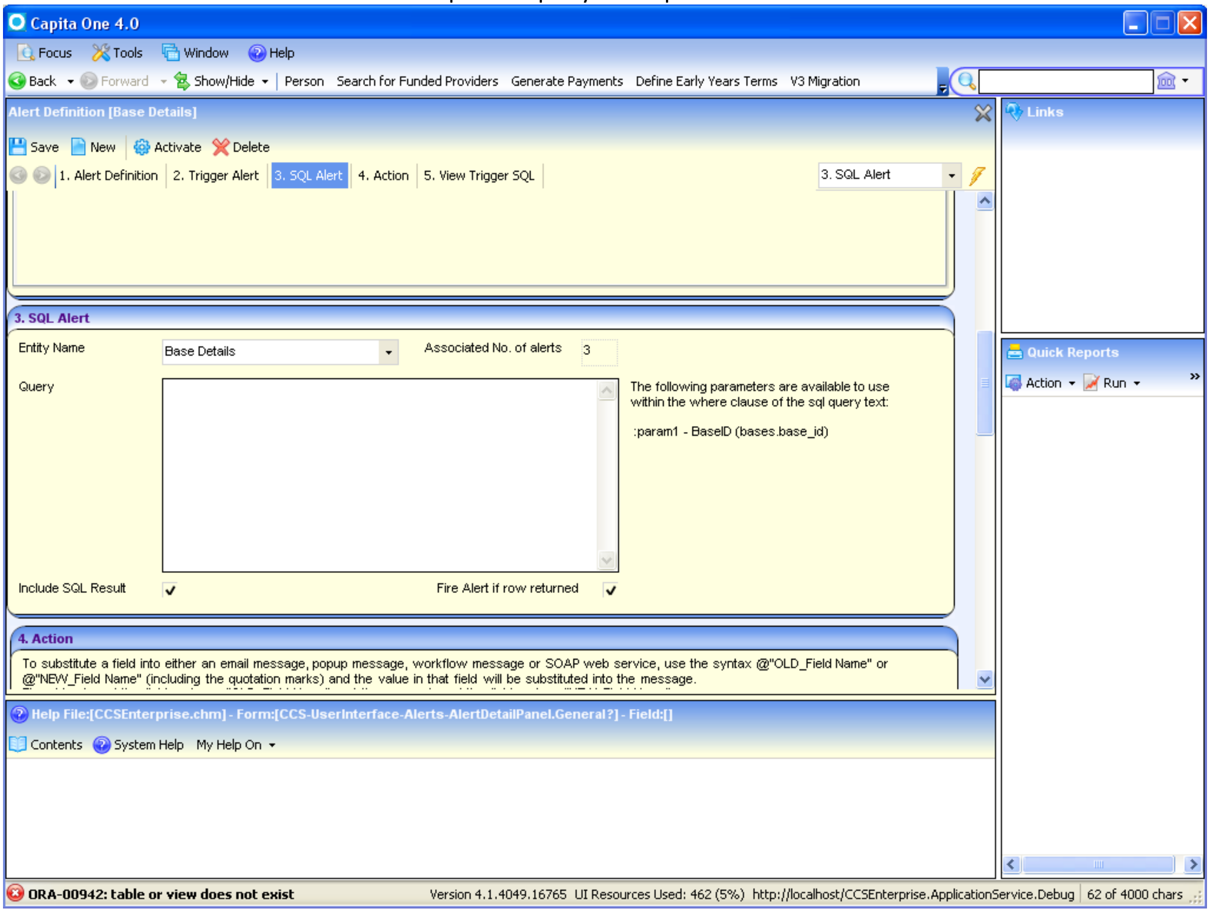
Creating SQL Statements Using Parameters



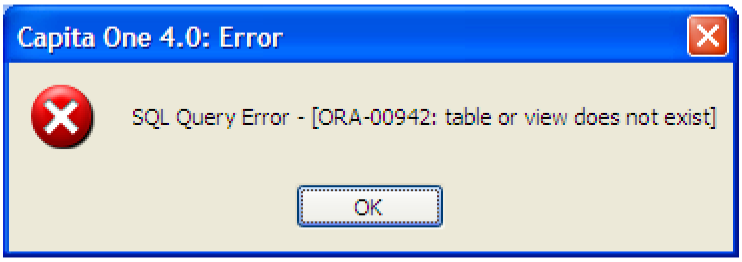
It is possible to add an SQL Statement with parameters in the SQL Alert panel in the '**Query** box'. The following general rules apply:

1. Any statement that does not begin with the word '**Select**' (including any comment markers) will be treated as invalid.
2. A comment must be entered as: **/* … */** or **--** (two minus characters) but is invalid if placed on the first line.
3. A second statement inserted by the use of a **semi-colon** will be ignored, although the statement may be interpreted as valid.
4. The user may use parameters; these are values that the System understands based on the user's focus. These parameters are made available via the Entity selected and must adhere to the convention: **:param*n*** where '*n'* is the relevant number.
5. The system will display an error message if the number of the parameter value exceeds the numbers of parameters available within the Entity. For example **:param3** where there are only two parameters available.
6. It is only possible to retrieve a parameter when it is placed in the **where** clause of the SQL statement.
7. It is possible to create **sub-selects** (SQL Statement where a Select statement exists in the Where clause).
8. The system will **not** save any invalid SQL Statements. The user must correct the statement or abandon it.

Where an SQL Query is not validated by the system an Oracle error message is displayed in the left-hand corner of the User Interface. In this example the query attempts to select from a non-existent table.



Users are reminded that it is possible to **double-click** on the error above in which case the message is displayed in a message box that may make the message clearer:



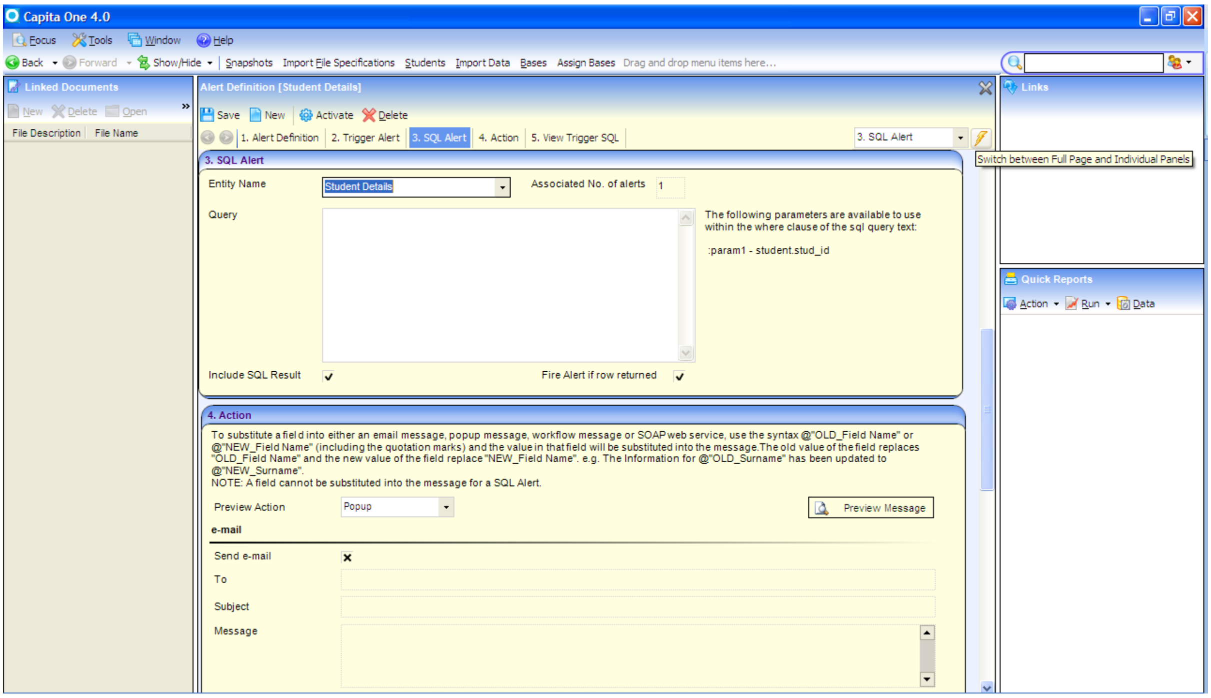
The Preview Button

We have introduced a **Preview** option for all SQL Alerts that can be viewed as a result of the following action outputs: Display Box (Popup Message), Email and Workflow. As yet we have not introduced the Preview option for Trigger based Alerts.

The **Action** panel provides a preview for a display box, email and workflow, but the option must be selected before it is possible to preview the message and potential result. In addition, the Alert must be saved but does not necessarily need to be Active.

In this example a message has been added and the result reflected in the message. Once the user adds the parameter, which is this case is the Person_id and selects '**Run**' the **Preview Message** button displays the result. Where the SQL would fail to return a row then the message changes to: '*This query would not cause an Alert to be shown, as no rows were retrieved*'.

Worked Example

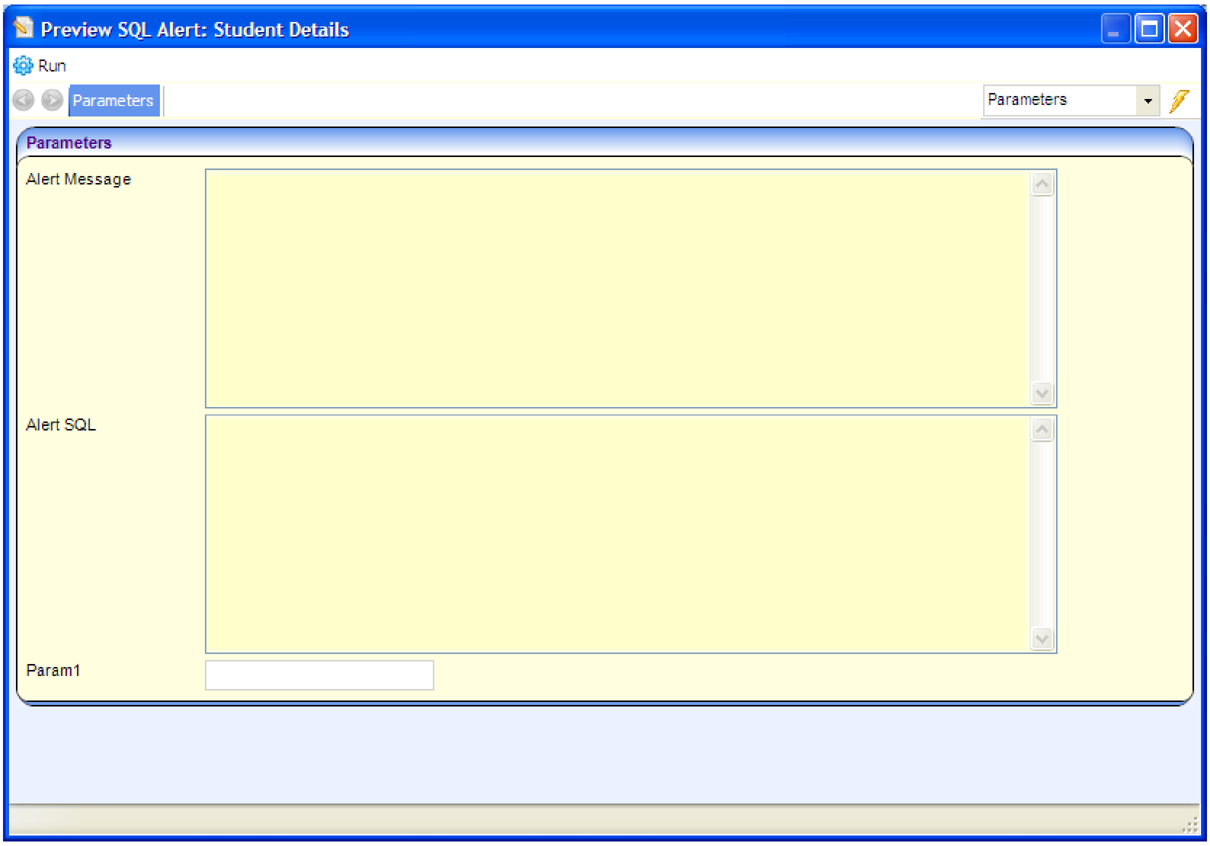


In this example an SQL Alert has been created for the Entity 'Student Details'. An SQL Query has been created and placed in the Query box by the user:

```
SELECT trunc(MONTHS_BETWEEN(SYSDATE,p.dob)/12,0) ageyears, s.stud_id, p.DOB
FROM People p, student s
WHERE p.PERSON_ID = s.STUD_ID
AND p.STUD_BASE_ID IS not NULL AND
(p.DOB IS NULL OR trunc(MONTHS_BETWEEN(SYSDATE,p.dob)/12,0) < 18)
AND s.STUD_ID =:param1
```

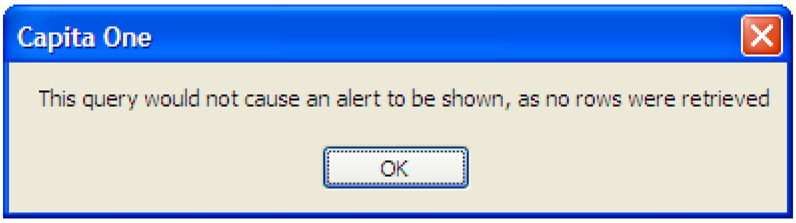
The list of parameters confirms that for this Entity the only parameter applicable is the Stud_ID from the Student view.

In order to preview the Query output it is necessary to select a **Preview Action** option of ‘**Popup**’, (seen in panel 4 ‘Action’ above’. At this point it is possible to select the ‘**Preview Message**’ button. The system then displays the following:

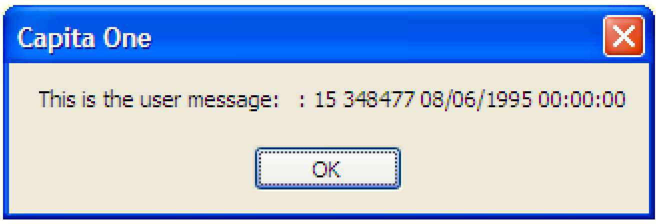


This is the Preview form

The user now supplies a parameter value and selects ‘**Run**’. If the SQL fails to return a row the following is displayed:

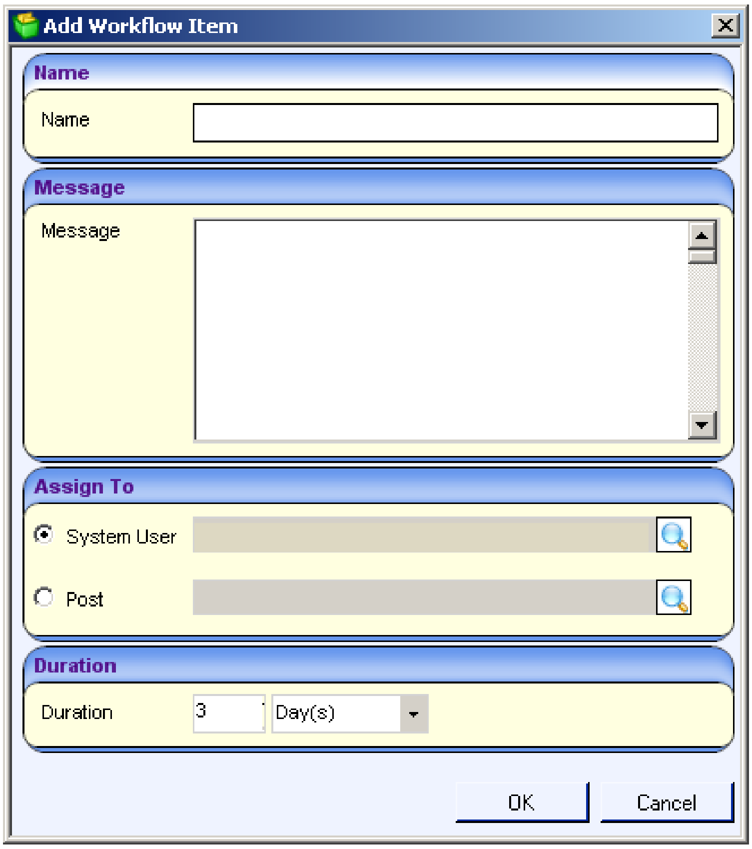


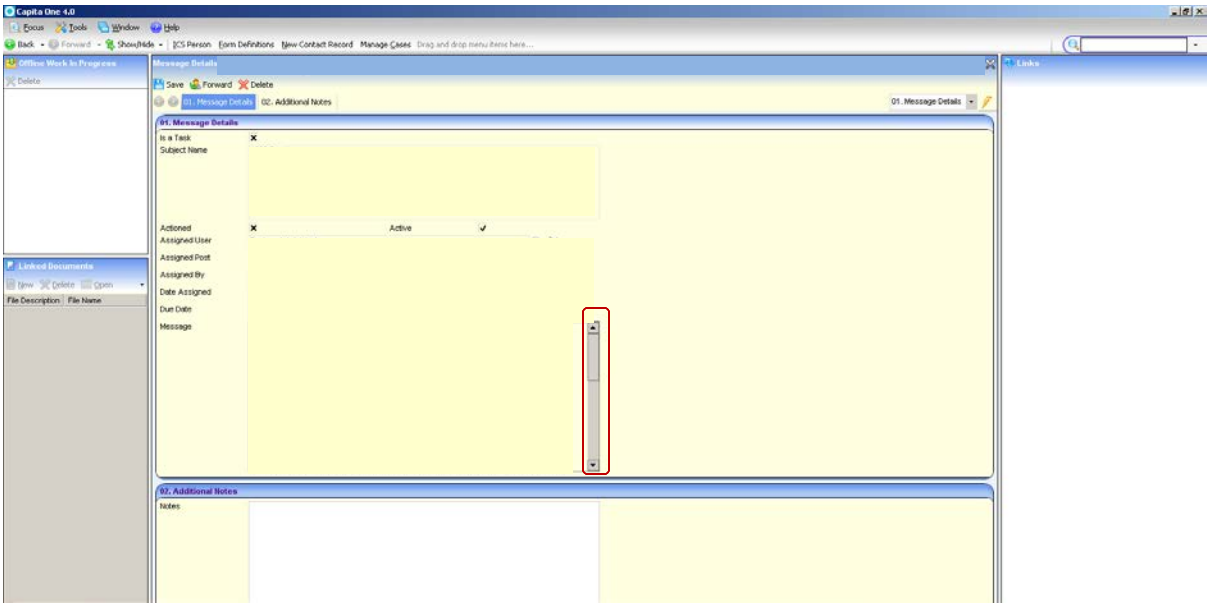
If the SQL is successful:



Changes to the Workflow Message Length

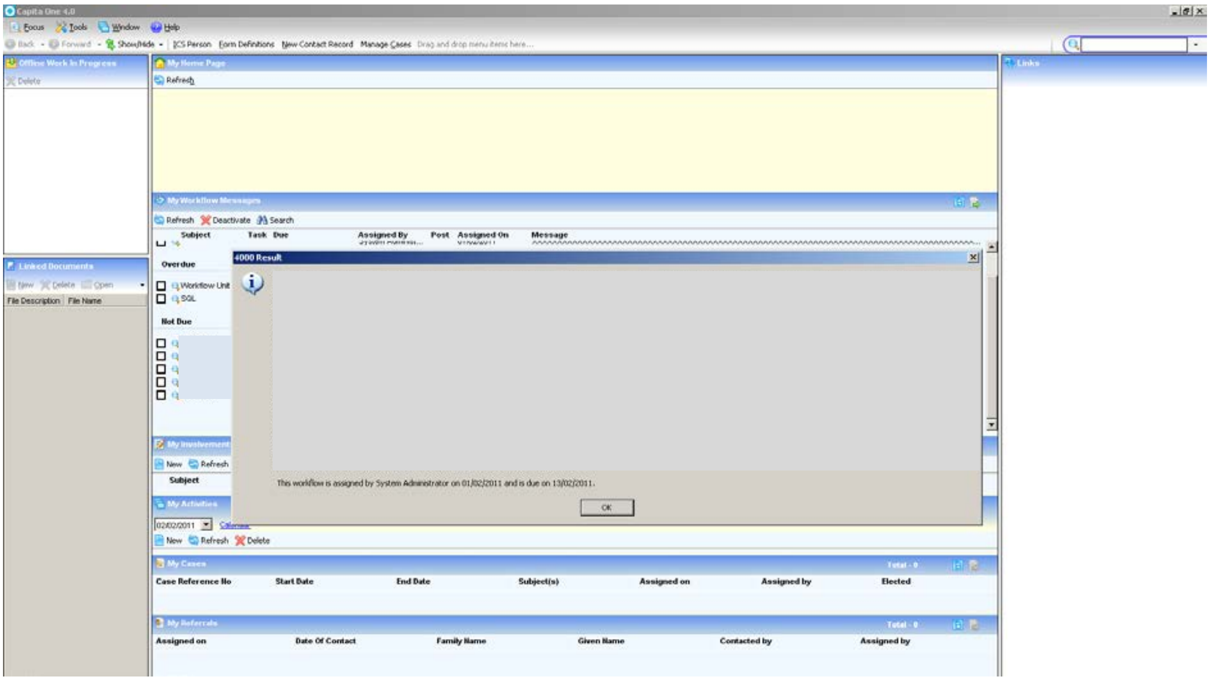
During the development of this work we discovered an issue where under some circumstances information in the Alert Message would not be displayed to the user because it contained more than 2,000 characters. We have therefore made a change in this release to extend the message length in a Workflow Message to 4,000 characters.





The Message Box may now be populated with up to 4,000 characters. The system will provide a scroll bar at the appropriate point.

When the message displays on the user’s homepage a popup box is displayed:



Alert Queue Housekeeping

During the development of this work we discovered an issue which had the potential to impact on the performance of the **One** software and this would be further impacted by the changes introduced for SQL Alerts. The software currently includes an **Alerts Queue** which retains information on all Alert Types that have executed and/or have expired. With the introduction of SQL Alerts this had the potential to grow exponentially; in addition to this it was deemed that there was no benefit to the software in the retention of these expired/executed Alerts. We have therefore introduced a database process which will regularly check for expired ‘popup’ Alert messages and permanently delete these from the database. The same process will also check for processed email/workflow and web server Alerts and will also remove these instead of marking them as processed as it does now. This will help to improve the performance of the Alerts processing capability in the **One** software.

Users should note that upgrade scripts include instructions that will automatically delete all expired messages in the database. Once deleted the system does not retain any record of the message. The user may wish to review all popup message Alerts to determine if any expired messages are to be retained for future use by setting the Expiry Date to null.

Notes for Users of the Online CSS, Exclusions and Governors Software

Users of the Online CSS, Exclusions and Governors software should note that this software doesn’t currently support the Alerts message box functionality. However, SQL Alerts created in the v4 client functionality will still trigger when users access Online records. For example in CSS Online an SQL Alert may still trigger when an Involvement record is accessed. The output, however, can only be seen in either an email or a workflow message. If the same Involvement record is accessed through the v4 client the message can be seen in a message box, but in Online this is not yet possible.

Appendix One – List of Entities and Allowable Parameters

The following comprises the list of entities against which it is possible to create an SQL Alert:

Entity Name / Screen	Menu Route / Link	Parameters (Provisional)
Base Details	Bases | Base | Base Definition	Base Id
Carer Details	Focus | People| Students | Carers Link | Edit the carers List	1. Person Id (Carer Id) 2. Student Id
Communication Log	people | Person / Student search | Communication Log | Edit | Communication log details	1. Communication Log ID 2. InvolvementID
CSS - Activity Details	1. People | Activities link | CSS Activity Detail 2. Base | Base Details | Activity Link |CSS Activity Detail	1. Activity Id 2. Base Id 3. Person Id(Activity Owner Id) 4. InvolvementID
CSS - Linked Activity Details	People | Activities link | CSS Activity Detail | Linked Activities panel | Edit | CSS Link Activity Details	1. Activity Id 2. Base Id 3. Person Id(Activity Owner Id) 4. InvolvementID
Court Orders	Student | Student search | Court order link | Court orders Panel 2. Edit button | Court Order Details	1. Record Id (Court Order Id) 2. Student_id 3. Guardian(Issued To) Id
CSS - Equipment Inventory	Focus | Equipment Inventory | Edit Equipment Inventory	Equipment Item Id
CSS - Equipment Loan	Focus | People | Student / Person | Equipment Loan Link | View/Edit Equipment Loan Details	1. Student Id 2. Equipment Loan Id
CSS - Generic Involvement	People | Person Search | Involvement | Involvement details | Generic CSS Involvement	InvolvementID
CSS - Legal Actions Involvement	People | Person Search | Involvement | Involvement details |Legal Actions Involvement	1. InvolvementID 2. Student Id(Subject)
Provision Allocation	Student/People | Student/People search | Provision link | Provision Summary | Provision Allocation details	1.Base Id 2. Student Id 3. Provision Id
CSS - Risks	Focus | People | Student / Person | Risks Link| View/Edit Risks	1. Person_id/Student_id 2. Risk Id
CSS - SEN Assessment Involvement	People | Person Search | Involvement | Involvement details |SEN Assessment Involvement	1. Involvement Id 2. Student Id(Subject)
CSS - SEN Standalone Review	People | Person Search | Involvement | Involvement details |SEN Standalone Review	1. Involvement Id 2. Student Id(Subject)
CSS - SEN Statement Review	People | Person Search | Involvement | Involvement details | SEN Statement Review	1. Involvement Id 2. Student Id(Subject) 3. Sen Ass Involvement Id

Entity Name / Screen	Menu Route / Link	Parameters (Provisional)
CSS - SEN Tribunal Involvement	People | Person Search | Involvement | Involvement details SEN Tribunal Involvement	1. Involvement Id 2. Student Id(Subject) 3. Sen Ass Involvement Id
Exclusion Details	Student / Bases | Exclusion Link | Exclusion Details	1. Student Id 2. Exclusion_Id
EY - Childcare Provider	EY | search for provider | Search childcare Provider (Select)| Maintain Provider	LA Service Provider Detail Id
EY - Enquiry Details	Enquiries | Enquiry | Search for enquirer | Detail of the Enquirer	Enquirer Id
EY - Funded Provider	EY | Search for Funded Provider | View/Edit Funded Service Details (or Bottom of the same page)	Funded Provider ID
EY - Staff Details	Staff | Staff Details | EY Staff link	Person ID
Governing Body	Focus | Governors | Governor Body	Gov Body ID
Governor	Focus | Governors | Governor By Name	Person ID
ICSF - Adoption Application	Adoption | Adoption application | Adoption Application Definition	1. Adoption Application Record ID 2. Applicant 1 ID 3. Applicant 2 ID
ICSF - Adoption Registration	Adoption | Adoption Register | Adoption Registration	1. Adoption Registration Record ID 2. Applicant 1 ID 3. Applicant 2 ID
ICSF - Adoption Placement	ICS Person | Chronology | Adoption Placements	1. Adoption Placement Record Id 2. Applicant 1 ID 3. Applicant 2 ID
ICSF - Fostering Application	Fostering |Fostering application | Fostering application definition	1. Fostering Application ID (Record ID) 2. Applicant 1 ID 3. Applicant 2 ID
ICSF - Fostering Registration	Fostering | Foster register | Fostering registration	1. Fostering Registration ID (Record ID) 2. Applicant 1 ID 3. Applicant 2 ID
ICSF - Fostering Placements	ICS Person | Fostering Placements	1. Foster Placement ID 2. Child ID 3. Carer 1 ID 4. Carer 2 ID
ICSF - Subject Case Notes	Focus | People | Person / ICS Person | Case Notes Link	Person_id
ICSF - Subject Contact Event	ICS Person | Chronology | Chronology Panel | Contact Event link in Chronology Panel	Contact Event Id
ICSF - Subject Exemplars	ICS Person | Chronology | Chronology Panel | Exemplars link in Chronology Panel	Exemplar ID (Record ID)

Entity Name / Screen	Menu Route / Link	Parameters (Provisional)
ICSF - ICS Person Details	ICS Person Details	Person_id
ICSF - Manage Case Details		
ICSF - Subject Other Event	ICS Person | Chronology | Chronology Panel | Other Event link in Chronology Panel	Case Other Event ID (record ID)
Person Details	People | Person details	Person_id
Public Care Order	Student | Student search | Looked after child link | Public care orders | Panel 3. Edit button | Child looked after details	Student ID? Public Care Order ID (Record id)
Pupil Funding Transfers	Student | Student search | Pupil Funding transfers | Summary | Edit | Pupil funding transfer details	1. Base ID 2. Student ID 3. Public Funding Transfer Id(Record Id excl_finance_id)
Reintegration	Student | Student Search | Reintegration link| Reintegration summary | Reintegration details	1. Base ID 2. Student ID 3. Reintegration Id (Record Id)
Relocation	Student |Student search | Relocation link | Relocation summery | Relocation details.	1. Student ID 2. Relocation Record ID
Service Provider Link	Services | Service Providers Link | Service Provider Link Enquiry | Service Provider Link Details	La service provider service id (record id)
Service Provision Details	Focus | Search Service | Provision | Search Maintain Service Provision	Service Provision ID Base ID
Social Network - Other Contacts	People | Person search | Social Network link | Other contact Details Link	1. Record Id 2. Subject ID? 3. (Contact Person ID)?
Social Network - Person Association	People | ICS Person search | Social Network link | Association Details | Person Association	1. Person Association ID 2. Subject ID? 3. (Contact Person ID)?
Student Details	Student | Student Details	Student Id
ICSF Adoption Case Notes	Focus| Adoption | Adoption Application | Adoption Chronology | Case Notes[Edit] or Focus | Adoption| Adoption Application | Adoption Case Notes	1. Record ID 2. Adopter 1 ID 3. Adopter 2 ID
ICSF Adoption Chronology	Focus |Adoption | Adoption Application | Adoption Chronology	1. Record ID 2. Adopter 1 ID 3. Adopter 2 ID
ICSF Adoption Exemplar	Focus| Adoption | Adoption Application | Adoption Chronology| Exemplar[Edit]	1. Record ID 2. Adopter 1 ID 3. Adopter 2 ID

Entity Name / Screen	Menu Route / Link	Parameters (Provisional)
ICSF Contact record	Focus |Contact Record |Manage Contact Record | Contact Record Details or Focus |ICS Person |Chronology | Contact Record[Open]	1. Record ID 2. Subject ID
ICSF Fostering Case Notes	Focus |Fostering |Fostering Application | Fostering Chronology |Edit| Case Notes or Focus |Fostering |Fostering Application | Fostering Case Notes	1. Record ID 2. Carer 1 ID 3. Carer 2 ID
ICSF Fostering Chronology	Focus | Fostering | Fostering Application | Fostering Chronology	1. Record ID 2. Carer 1 ID 3. Carer 2 ID
Fostering Exemplar	Focus | Fostering | Fostering Application | Fostering Chronology | Exemplar[Edit]	1. Record ID 2. Carer 1 ID 3. Carer 2 ID
ICSF Child Protection Event (CPR)	Focus | Person| ICS Person |Chronology |Child Protection | Child Protection Details | Panel 03.|Details	1. Record ID 2. Subject ID

SQL Mail Merge

Introduction

We have introduced the SQL Mail Merge functionality previously available in v3. This functionality is effectively new and due to technical constraints we are not able to transfer existing SQL Queries to this facility. However, Administrators may copy SQL Statements to this new functionality if they wish to continue creating file output.

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 but this is not the exclusive use. The data may also be used for analysis in Excel for example. As per the previous functionality we only allow SQL statements that begin with the word 'Select' all other command such as 'Update', 'Insert' or 'Delete' are prohibited and will fail validation. Equally, Statements separated by a semi-colon will also fail validation. Once the file is created the User can export the data to a nominated file folder on the system's network or to a local machine.

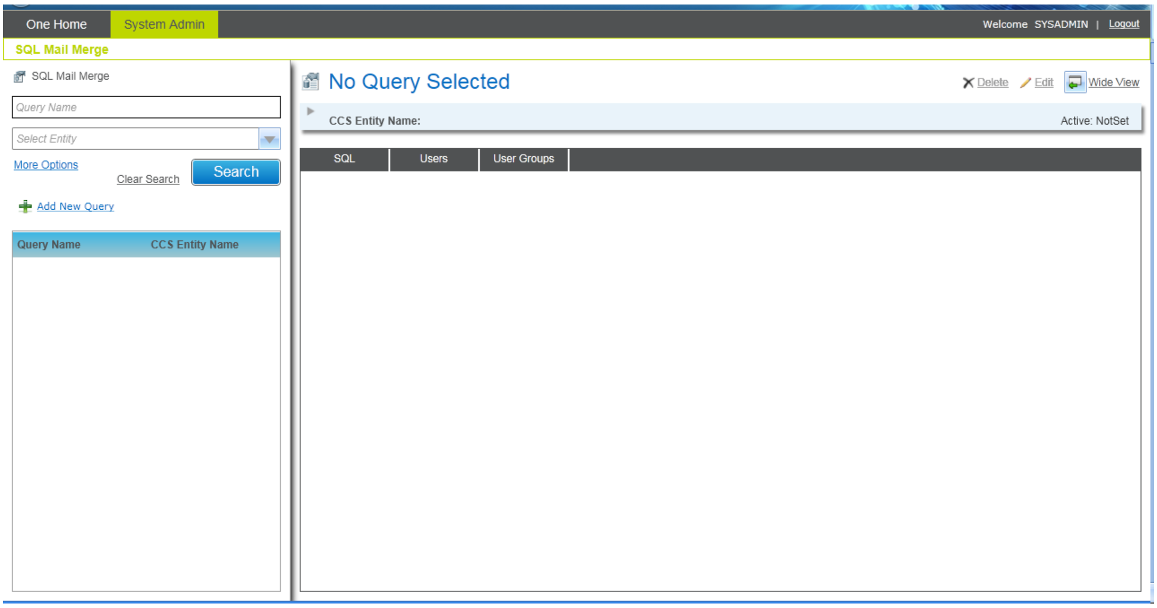
In addition, we have also included the facility for the System Administrator to nominate which users may initiate the Query.

Users and **Groups** are set up in **v3**
The **SQL Statement** is defined in **v4 Online**
SQL Mail Merge can now be run in **v4** and **v4 Online**

Navigation

Navigation to the SQL Mail Merge functionality is via the '**Administration**' option after logging in.

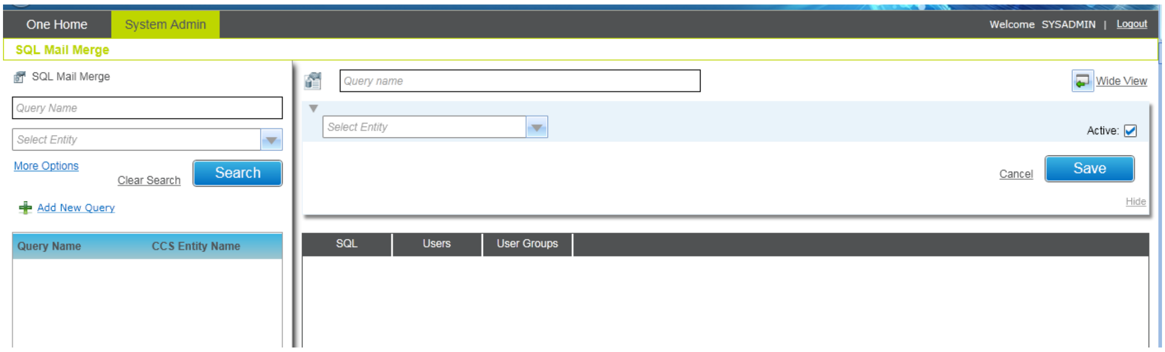
Currently once ‘**Administration**’ is selected there is only one option (other than to return to the **One Home** screen). For subsequent releases we will add more options.



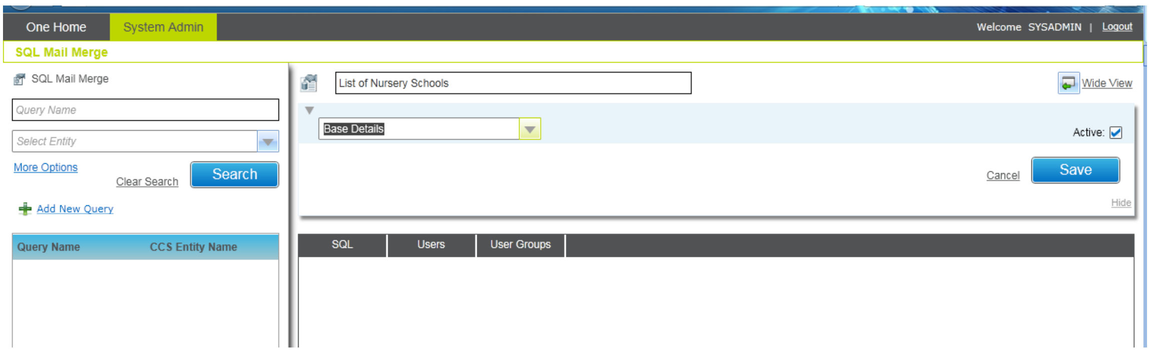
The ‘**Query**’ screen comprises two main areas. To the left is a panel that is both a selector with a Search facility and provides the option to create new ‘Queries’. The right-hand panel comprises a tab in which to Create/**Edit** the Query, a tab to determine which **Users** can initiate the Query and a third tab which determines which **User Groups** may initiate the query.

Creating a New Query

In order to create new queries select the ‘**Add New Query**’ option in the ‘**SQL Mail Merge**’ panel:



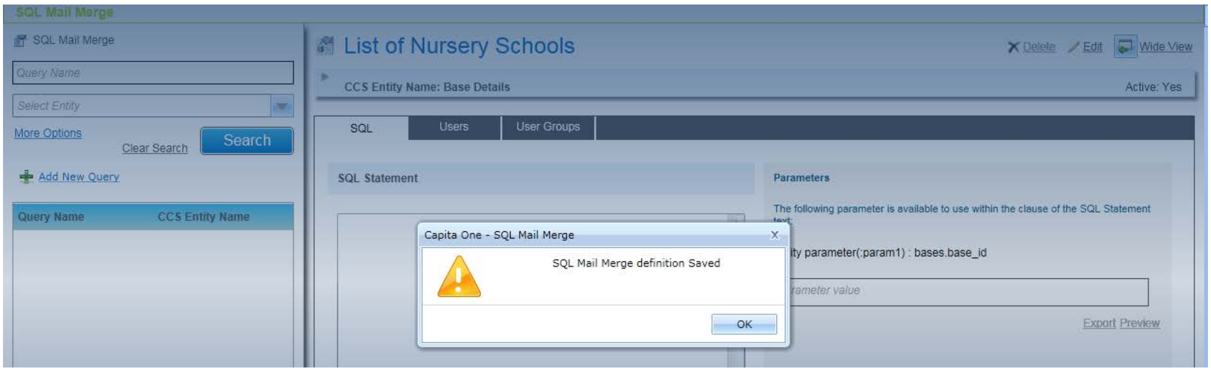
After selection the right-hand panel alters to allow the Administrator to add a suitable Name for the Query:



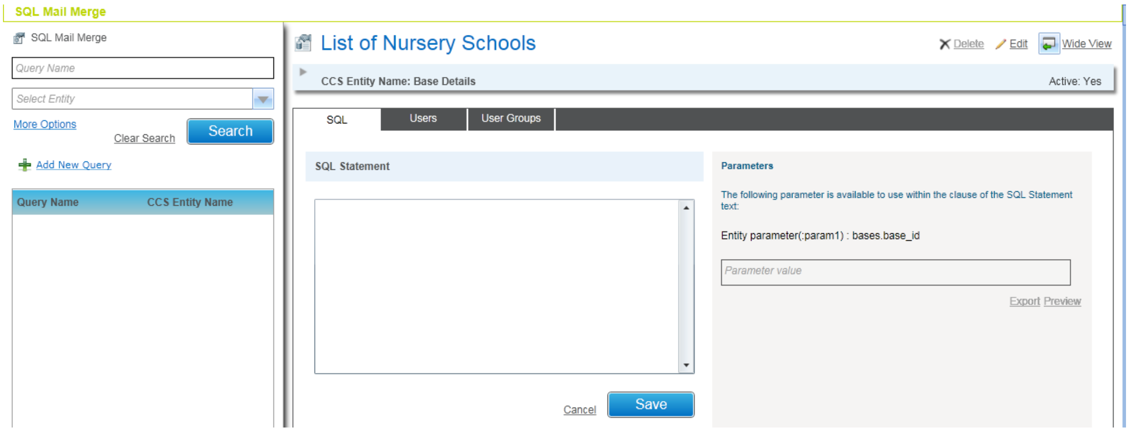
In addition, the Administrator may select an **Entity** from the drop-down list appropriate to the Query. The selection of the Entity both provides a focus of where the Query can be initiated and determines the

Parameters that the system can pass into the Query. The processing of parameters is explained below, and at the Annex to these notes we provide a full list of the Entities available and the Parameters available.

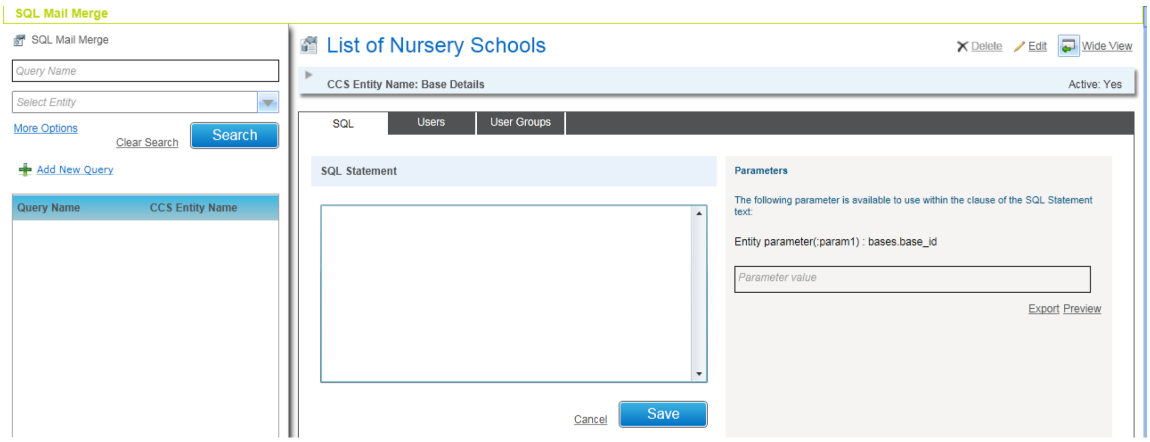
At this point with only the **Name** and **Entity** selected it is necessary to **Save** the Query. This is simply to ensure that records in child tables are created with a **primary key** and that in the event of cancellation by the Administrator, that database records do not become orphaned. The system should confirm the Save:



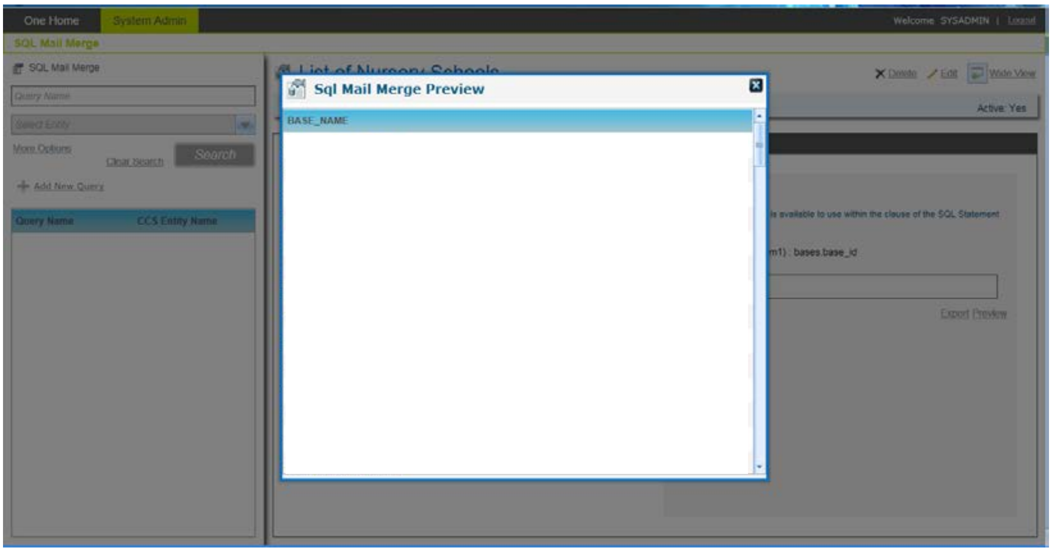
At this point the **SQL Statement** text entry 'box' becomes available. The Administrator may now write (or paste in) the required SQL Statement.



As this is the '**Bases**' entity the user may use the **Base_id** as the parameter in the query. Simply expressed this would allow the user to create a query based on the Base selected in the v4 Bases focus. However, in this example the use of a parameter is not appropriate.



The Query can be added, but once again it must be saved before the **Preview** option can be selected (if the Query is not saved it **will not** fire, as it has to be validated):



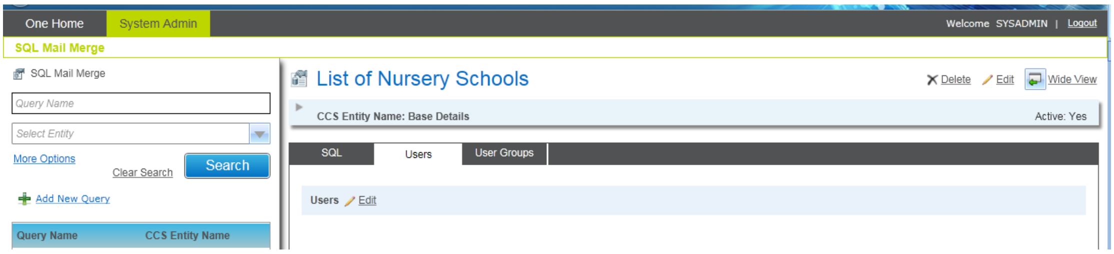
Once the query is saved (this assumes it has been validated) the system automatically sets the Query to **Active** and changes the Status so the Administrator can no longer edit the Query.
To re-edit the Query select the '**Edit**' option above the SQL Statement.

Invalid SQL Statements

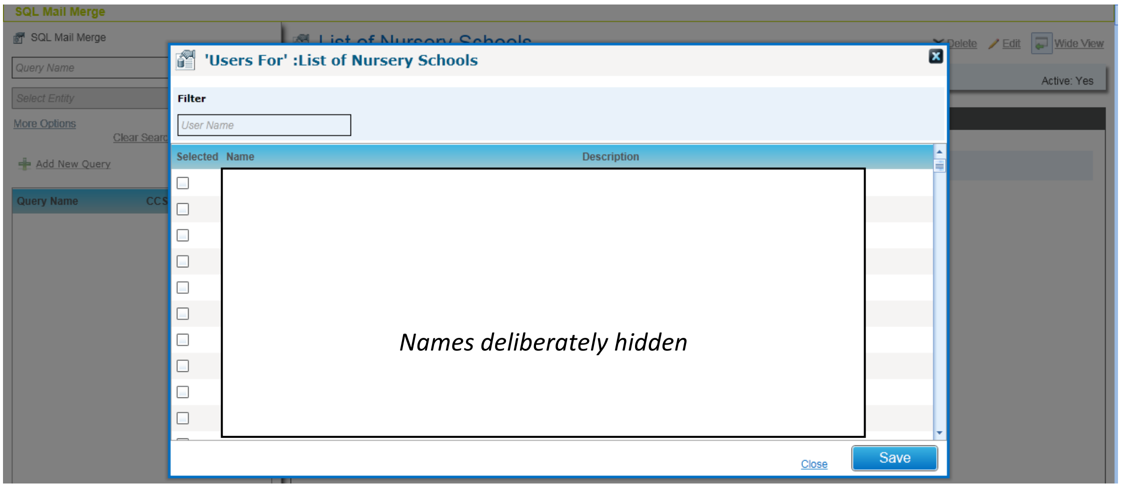
Any attempt to insert malicious code will fail validation and the system will display an error message (or messages). On this basis the system will not save the Query. (Comments in the query may be added, but not on the first line).

User who may initiate the Query

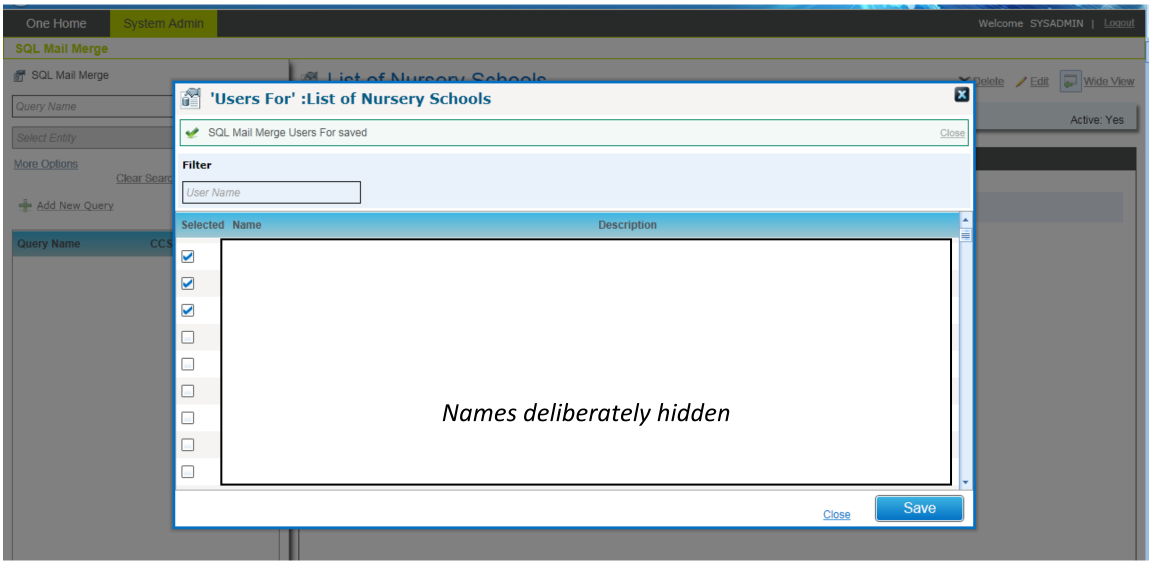
It is now possible to create the list of Users who may initiate the Query by selecting the '**Users**' tab:



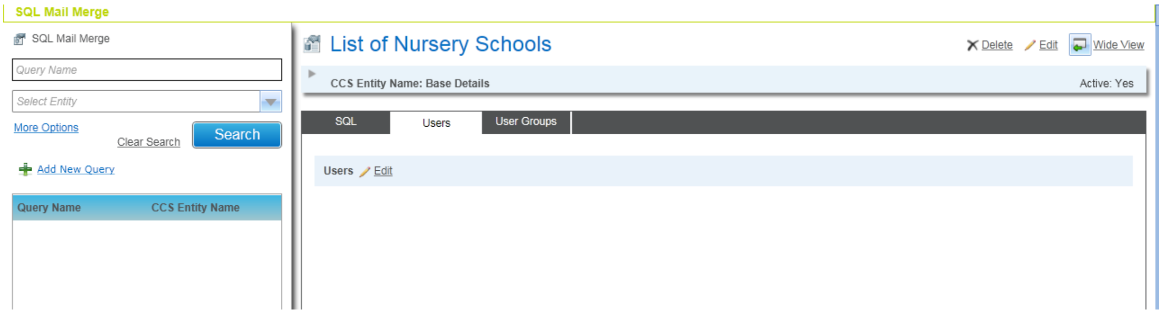
Once the tab is selected the Administrator selects the '**Edit'** link:



The User can select all Users who will be able to create the Query and **Save**:



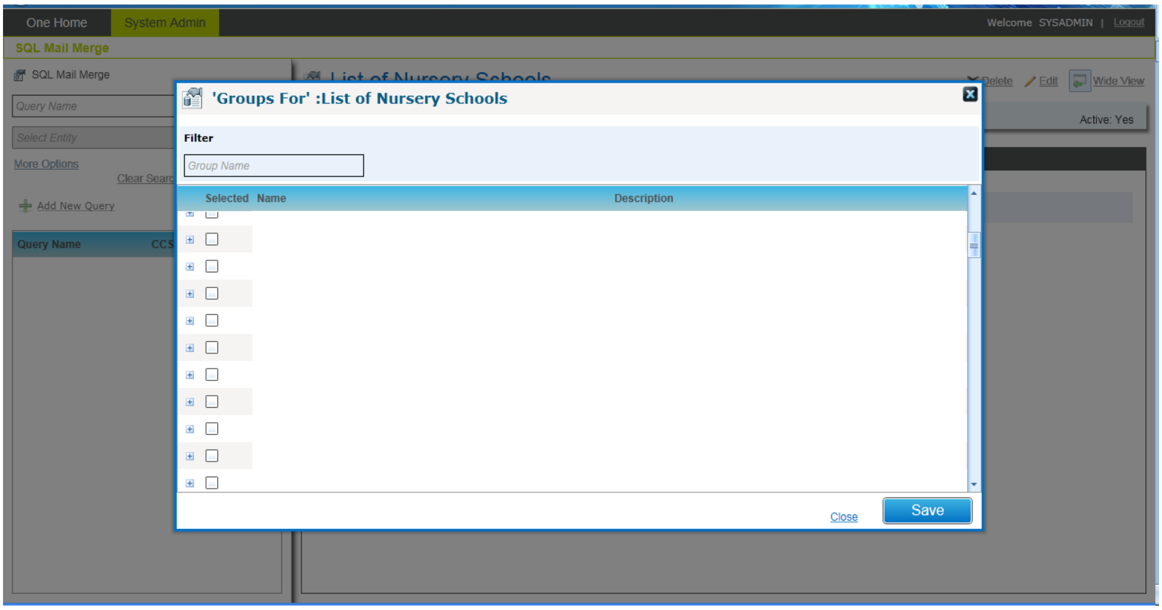
After selection the user should **Close** the selection box.



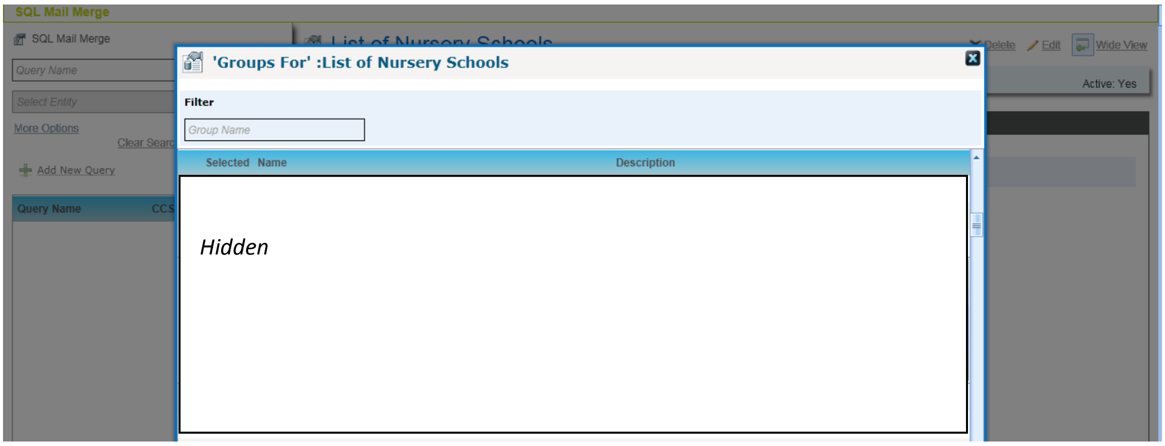
The Administrator may select **Edit** if there is a requirement to view the **User Name**/**Description** as this display only shows the User account.

User Groups who may initiate the Query

The same process is followed for the selection of **User Groups** as per **Users**:

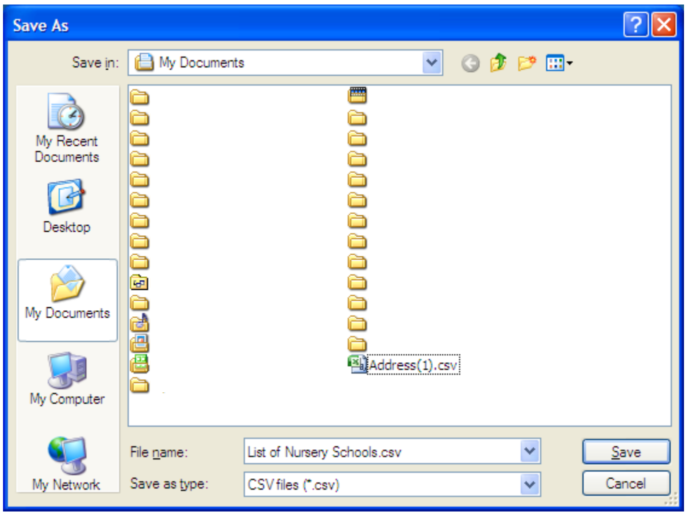


It is also possible to expand the **User Group** to display the members, although it is not possible to remove individual members from access to the Query.



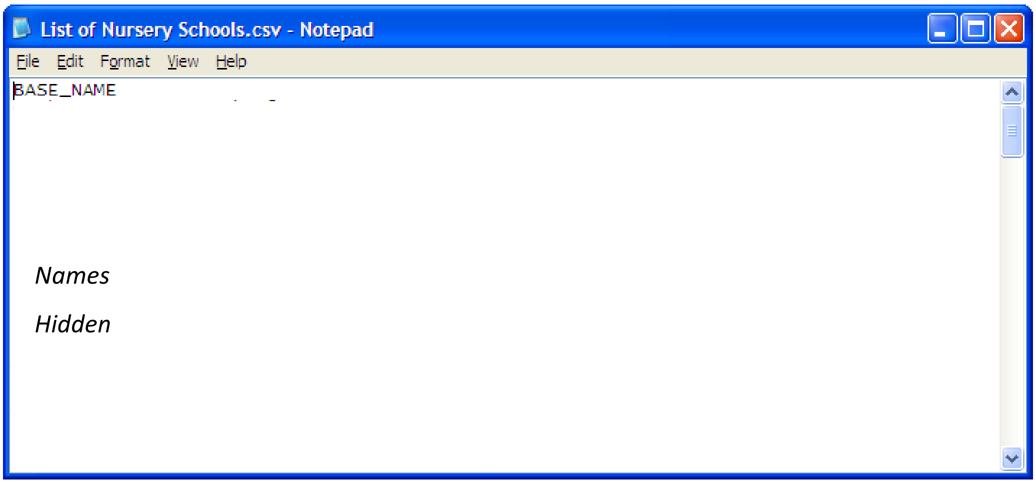
Exporting of the Query

It is possible to Export the Query by selecting the 'Export' option. The system will display the User's standard file browser:



Select the '**Save**' option. The system should offer confirmation that the file has generated successfully. **Please also note that it is only possible to export the data to a .CSV file**; no other formats are available.

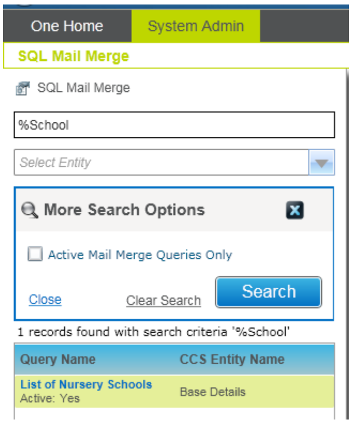
The file may be viewed in Excel or other notepad type application:



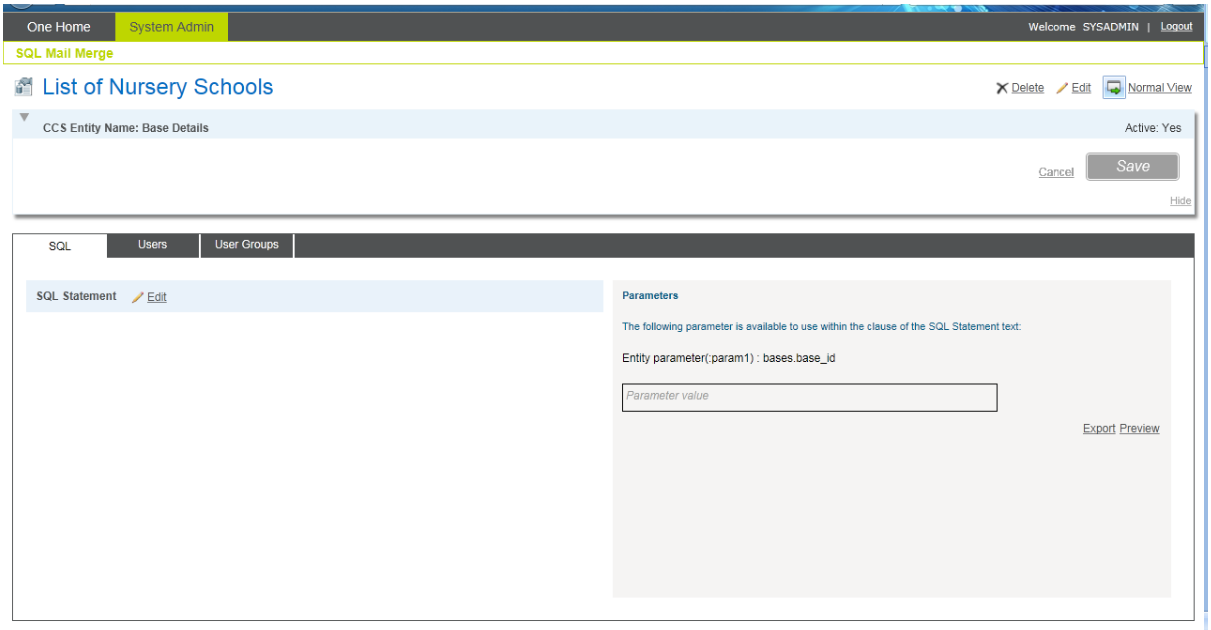
Searching for Queries

Once the Administrator has created queries, they may be searched for using the left-hand panel. This allows the Administrator to search for queries by the following:

1. By **Name** using the exact name by a partial search, for example List%, List or %School will return 'List of Nursery Schools'
2. By the **Entity**
3. By using the **More Options** button, this option allows the Administrator to search for Active Mail Merge queries only.



Once selected the '**Wide View**' option can be selected to hide the selection panel.

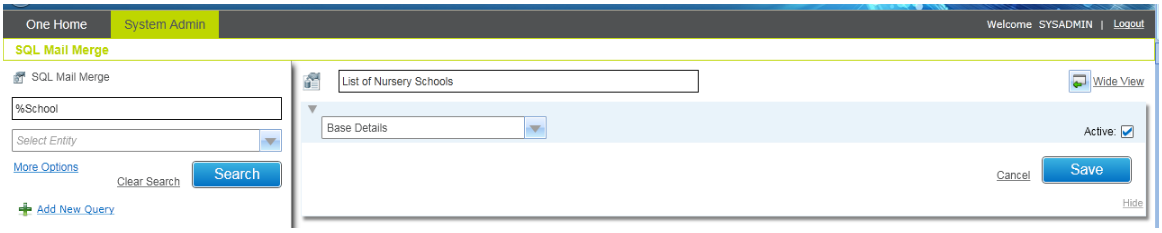


To view the selection panel the Administrator should select the '**Normal View**' option.

A '**Clear Search**' option is available to create a new **Search**.

Making the Query Inactive

By default the system sets the Query to **Active** when it is saved. By selecting the '**Edit**' option, it is possible to render the Query **Inactive**:



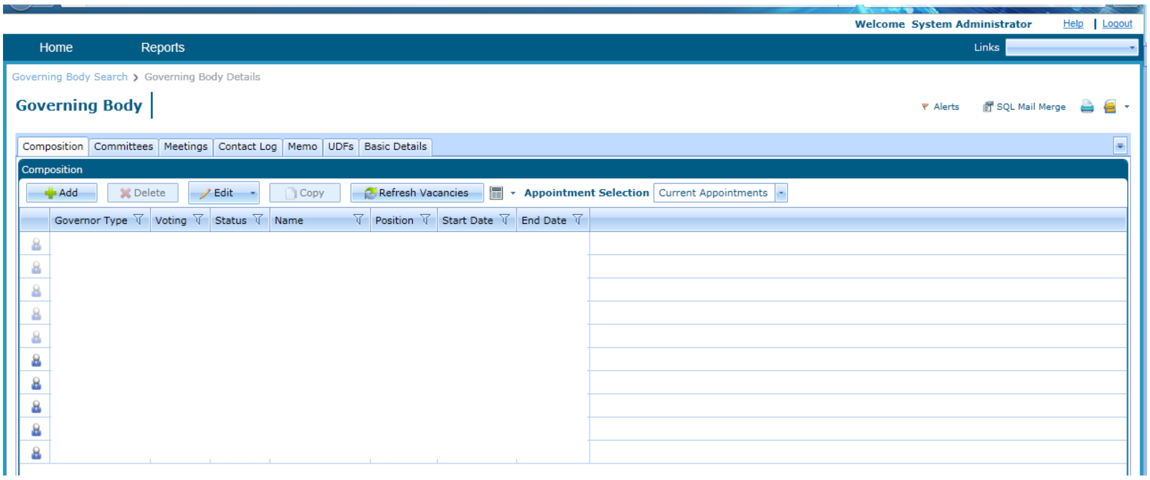
The Active box may be '**un-ticked**' if the Administrator wishes to set the Query as **Inactive**.

Deleting the Query

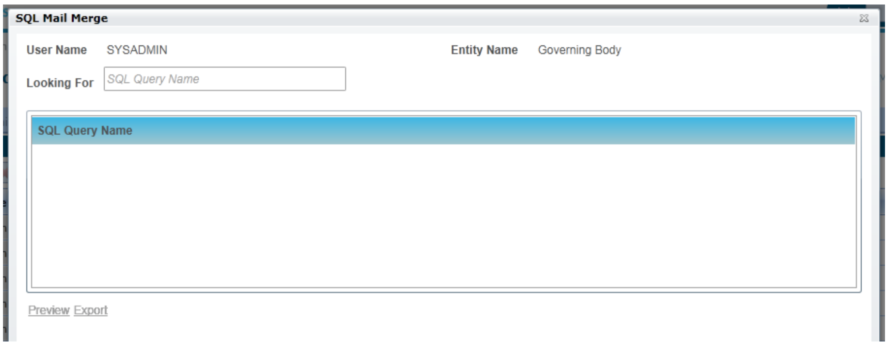
It is possible to delete a Query. The Administrator should select the '**Delete**' option. The system will ask the Administrator to confirm the deletion, after which the Query will be deleted.

Creating Queries from the User Perspective

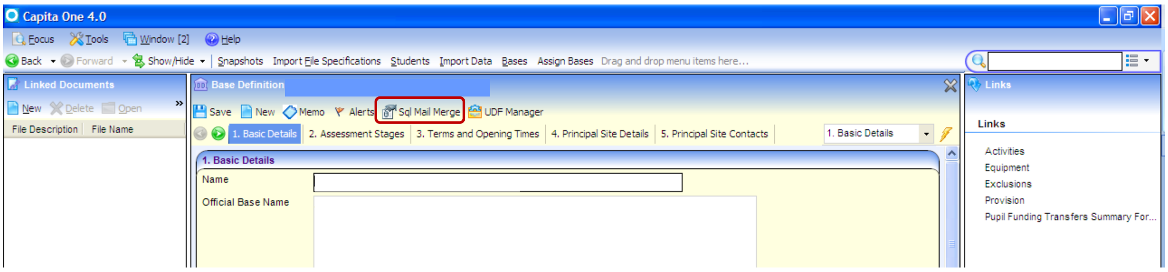
Once the Queries have been created they may be run for the selected Users. Within appropriate v4 or v4 Online focus options, the **SQL Mail Merge** button is displayed:

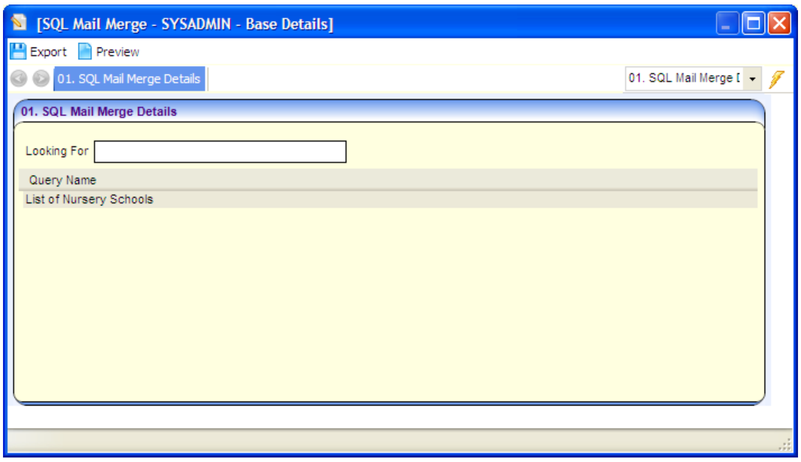


If the User does not have permission or there are no queries created for the Entity a blank selection box is displayed:



In v4 (in this example) Bases the user will see the **Sql Mail Merge** button in the top panel:





The system now displays a new selection box which will include permitted Queries for the User to initiate. The **Query**, **Preview** button and/or **Export** button can now be selected.

Time Out of Queries

At the time of this release we are constrained by the architectural design of v4 to a time limit of one minute for the execution of a Query. We hope that this is a short-term measure and we have undertaken a study to determine if the length of the time-out can be increased or negated such that potentially Queries that take longer to execute can be accommodated. However, we hope that Administrators agree that SQL Statements must be well-written in order to avoid the possibility of time-outs.

Annex List of SQL Mail Merge Entities and Parameters

Entity	Table	Primary key (Parameter)	Group	V4/Online
Address Manager	ADDR_HD	Address_Id	Person/Student	V4
Base Details	BASES	Base_id	Person/Student	V4
Carer Details	RELATIVE	Rel_Id	Person/Student	V4
Communication Log	COMMUNICATION_LOG	Comm_Id	Person/Student	V4 & Online
Court Orders	COURT_ORDERS	Record_id	Person/Student	V4
CSS - Activity Details	ACTIVITY	Activity_Id	CSS	V4 & Online
CSS - Equipment Inventory	EQUIPMENT	Equipment_Id	CSS	V4
CSS - Equipment Loan	EQUIPMENT_LOAN	Equipment_Loan_Id	CSS	V4 & Online
CSS - Generic Involvement	INVOLVEMENT	Involvement_Id	CSS	V4 & Online
CSS - Hearing Impairment	HIVI_HEARING_IMP	HIVI_Hearing_Imp_Id	CSS	Online*
CSS - Visual Impairment	HIVI_VISUAL_IMP	HIVI_Visual_Imp_Id	CSS	Online*
CSS - Legal Actions Involvement	INVOLVEMENT	Involvement_Id	CSS	V4
CSS - Provision Allocation	PROVISION	Provision_Id	CSS	V4
CSS - Risks	SSS_RISK_ASSESS	Risk_Assess_Id	CSS	V4
CSS - SEN Assessment Involvement	INVOLVEMENT	Involvement_Id	CSS	V4
CSS - SEN Standalone Review	INVOLVEMENT	Involvement_Id	CSS	V4
CSS - SEN Statement Review	INVOLVEMENT	Involvement_Id	CSS	V4
CSS - SEN Tribunal Involvement	INVOLVEMENT	Involvement_Id	CSS	V4
Exclusion Details	EXCLUSIONS	Excl_Id	Exclusions	V4 & Online
EY - Childcare Provider	LA_SERVICE_PROVIDER	LA_Service_Provider_Id	Early Years	V4
EY - Enquiry Details	EYE_ENQUIRER	Enquirer_Id	Early Years	V4
EY - Funded Provider	PROVIDER	Provider_Id	Early Years	V4
EY - Staff Details	PEOPLE	Person_Id	Early Years	V4
Governing Body	GOV_BODY	Body_id	Governors	Online*
Governor Appointment	GOV_LINK	Appt_id	Governors	Online*
Person Details	PEOPLE	Person_Id	Person/Student	V4 & Online
Provision Allocation	PROVISION	Provision_Id	CSS	V4
Public Care Order	LOOK_AFTER_PUPIL_HIST	Hist_Id	Person/Student	V4
Pupil Funding Transfers	EXCL_FINANCE	Excl_Fianance_Id	Exclusions	V4
Reintegration	EXCl_PRU_HOURS	Record_Id	Exclusions	V4
Relocation	RELOCATION	Relocation_Id	Exclusions	V4
School History Details	STUD_HIST	Hist_Id	Person/Student	V4
Service Provider Link	LA_SERVICE_PROVIDER_SERVICE	LA_Service_Provider_Service_Id	Provider	V4
Service Provision Details	LA_SERVICE_PROVIDER_SERVICE	LA_Service_Provider_Service_Id	Provider	V4
Student	Student	Stud_id	Person/Student	V4 & Online

NOTE - **Online*** indicates that the functionality is primarily online, however it is available in **v4** as embedded Silverlight.

System 3.44

System (v3 & v4)

Multi Line UDF’s

KB102669 - Users are unable to start a new line within UDFs which have a data type of Text

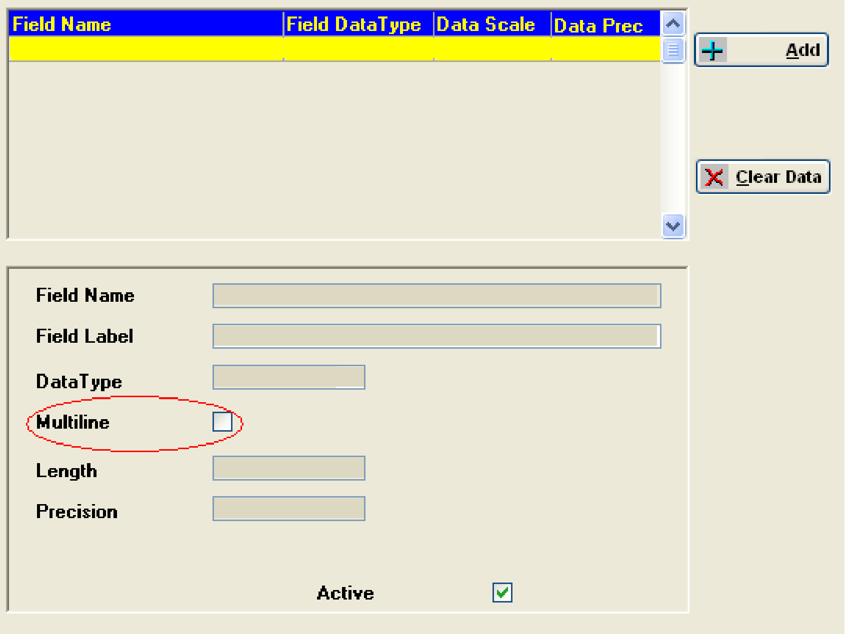
The issue being addressed is the ability for a user to have multiple lines of text within a UDF (User Defined Field).

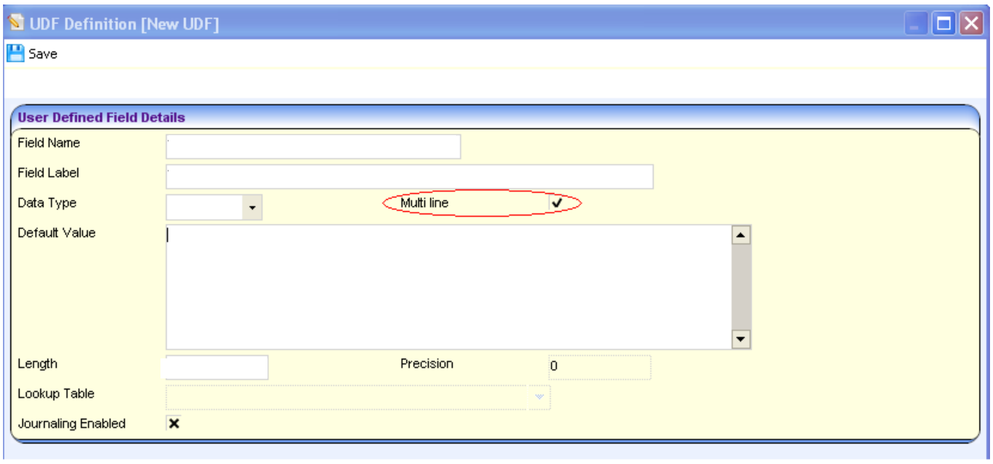
If the user clicks on the return key to start a new line of text within a text UDF then this does not start on a new line. This can result in the text being difficult to read.

The solution proposed is to have a check box within the data type of text which will determine whether or not the UDF text box will be multi line.

Changes made for Multi Line UDF’s

- The new Multi Line check box will be available for the UDF data type of Text only in v3 and v4.





- When creating a brand new Multi Line UDF, the check box must be selected. After saving the Multi Line UDF it will not be possible to revert this back to single line text. If a user attempts to uncheck the Multi Line text box then the following message will appear - 'Cannot disable Multi line once it has been enabled'.
- Existing text UDF's in v3 and v4 can be changed to Multi Line by going in to UDF management and checking the Multi Line check box.
- Any Multi Line UDF's which have been created against a Service in v3 can be migrated over and will stay as Multi Line UDF's as well as retaining the data within them.

Inactive Lookup Codes

In-use Current Lookups made Inactive no longer Display

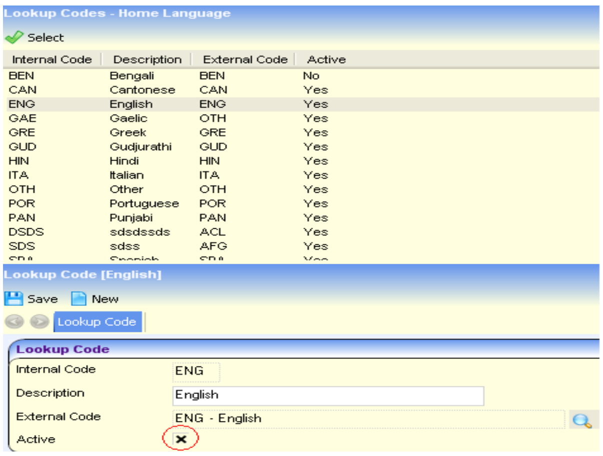
The issue being addressed is that lookups which are currently being used no longer appear once they have been made inactive.

Example – A Student has a Home Language of English selected. The user then takes the route Tools | Administration | Lookups | Home Language, selects English and sets as Inactive. After this has been saved, the Students Home Language dropdown will show blank.

The proposed solution is to retain any current selected lookup if it has been made inactive after its selection. This will not make the lookup available for selection to any other data record but will not be removed from the data record it has already been selected for.

Changes made for Inactive Lookup Codes

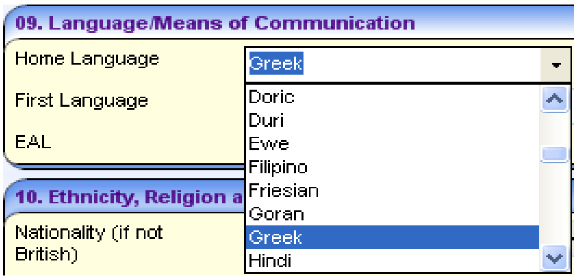
- If a lookup is made inactive in Tools | Administration | Lookups,



It will still show in the front end in an existing selection.

- When the user opens up a lookup dropdown and selects an alternative selection, the user can still revert back to the previously selected lookup until the new selection has been saved. The current lookup will appear at the top of the drop down list.

- When the user opens up a lookup dropdown and selects an alternative selection and saves, this new selection is now showing as the current selection in the dropdown and the inactive lookup will no longer show.



KB References

KB106848 - Day Care Type can be selected even though the lookup code is inactive.

KB107225 - Closure Reason can be selected even though the lookup code is inactive.

KB101415 - Blank Status on Involvement Summary prevents involvement from being deleted.

KB96625 - Data not displayed in case of inactive lookup value for Disability and Ethnicity.

KB105842 - Users are unable to see historical values when a lookup value is made inactive.