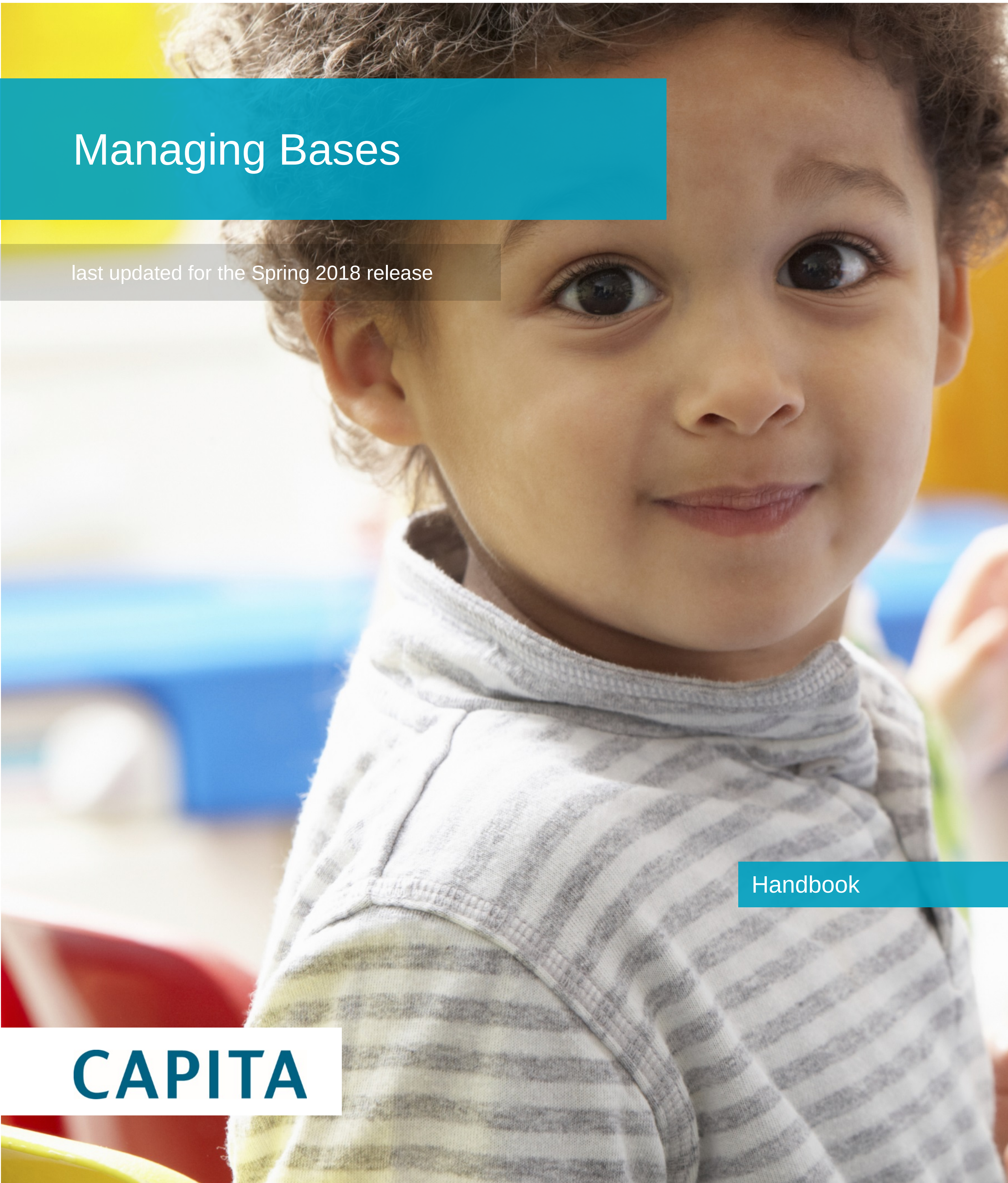
oneeducation

Managing Bases

last updated for the Spring 2018 release



Handbook

CAPITA

Revision History

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Managing Bases Handbook/Spring 2018/2018-04-11

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Contacting One Application Support

You can log a call with One Application Support via the Customer Service tool available on My Account.

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

Contents

01 | Introduction

Bases v4 enables Local Authorities to access a browser based Bases application from the Capita One Online Home page. Bases v4 provides the functionality for maintaining and administering bases. This document has been written to provide a handbook for every level of user, from setting up permissions to creating and administering bases.

Overview

Bases v4 enables the recording of details for each base, creating and maintaining base groups, managing Quick Reports and administration of bases.

For each base, you can record:

- Summary details
- Base Details, including Statutory and Additional information
- Contacts
- Opening Times
- Sites (including Gates)
- PAN (Published Admission Numbers)
- Areas
- Ofsted & Awards
- Base History & Classification
- Student Numbers.

Base groups can be populated either manually or using Report Manager.

What's New in this Release?

Changes to UK Bases

Update Table with Latest Lists

For the One Education Spring 2018 Release (3.65), 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.

Using this Handbook

This handbook is intended for those using One v4 Online to administer bases.

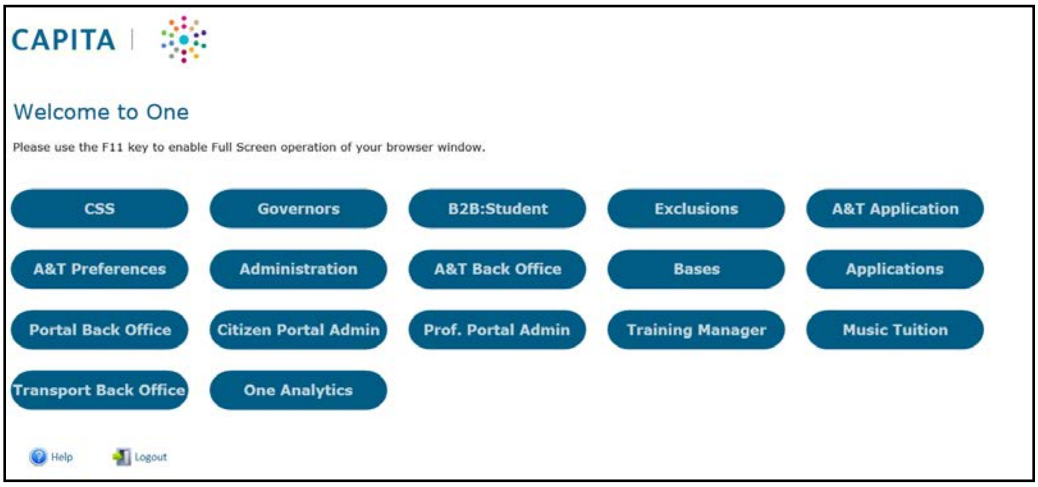
It covers the following functionality:

- Recording and updating base details.
- Importing GIS catchments and displaying geocoded bases on a map.
- Creating and populating base groups.
- Running reports.
- Administration of bases.

Getting started with Bases v4

Accessing Bases

To access Bases from the Capita One Online Home Page, click the **Bases** button.



Granting Permissions to Access Bases

Bases v4 is only accessible if your Local Authority has set up Read permission to the Bases business process.

This permission can be granted to a group of users by System Administrators in the v4 Client.

1. Select **Tools | Permissions | User Group Processes**.
2. Select **Base Administration** from the **Main Business Process** drop-down list.
3. In the Business Processes panel, assign **Read** permissions for the **Bases** business process.

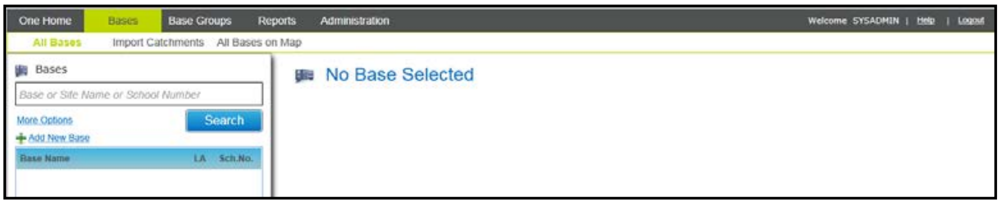
Without this permission the user cannot see the **Bases** button on the Capita v4 Online Home Page. With this permission users can search for bases.

Additional permissions are needed to view and update base information. For more information, see Setting up Permissions on page *61*.

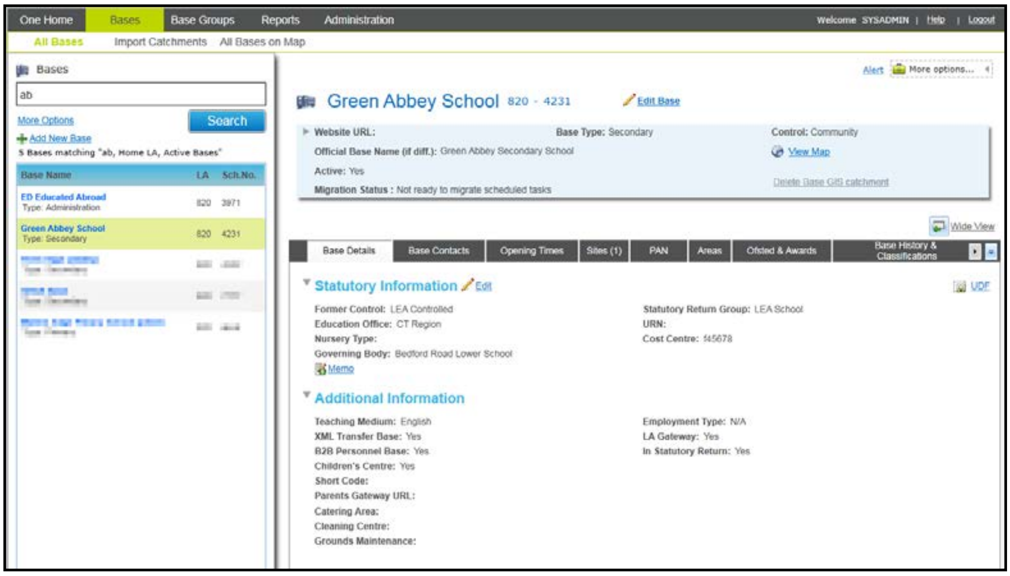
Overview of Navigation

Navigation is via a series of options presented horizontally. The primary level navigation options are **Bases**, **Base Group**, **Reports** and **Administration**.

For most of the key screens, a search panel is presented on the left-hand side of the screen. Default search options are displayed and, on some screens, further search options are available via a **More Options** link. The search results are listed with an indication of the criteria used. The following graphic shows the default **Bases | All Bases** search screen:



Once an entity (e.g. **Base** or **Base Group** depending on the navigation option) has been selected, a summary of key details for that entity is displayed in the top right-hand side of the screen. For users with the required permissions, an **Edit** link is displayed at the top of this area.



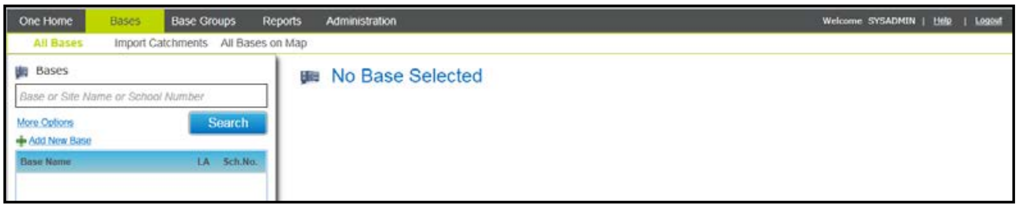
Underneath the summary, further details and tabs are enabled, depending on the user's access rights.

A **Wide View** option is provided so that the search panel can be temporarily hidden to maximise the horizontal space available.

02 | Managing Base Details

Introduction

When **Bases** is selected from the Capita One Online Home page, the following page is displayed:



> ***NOTE:*** *The primary and secondary menu options depend on permissions that have been set up for each user and licensing that applies to your Local Authority.*

The following functionality is available from this page:

- **All Bases** is used to search for bases and to view and maintain base information. For more information, see Bases | All Bases on page *5*.
- **Import Catchments** is used to upload v4 GIS catchment files. For more information, see Importing Catchments on page *29*.
- **All Bases on Map** is used to search for geocoded bases and show selected bases on a map along with their associated catchment. For more information, see Viewing Bases on Map on page *31*.

Bases | All Bases

Introduction

The **Bases | All Bases** page is displayed when you select **Bases** from the One v4 Online Home page.

The **Bases | All Bases** page is divided into two areas:

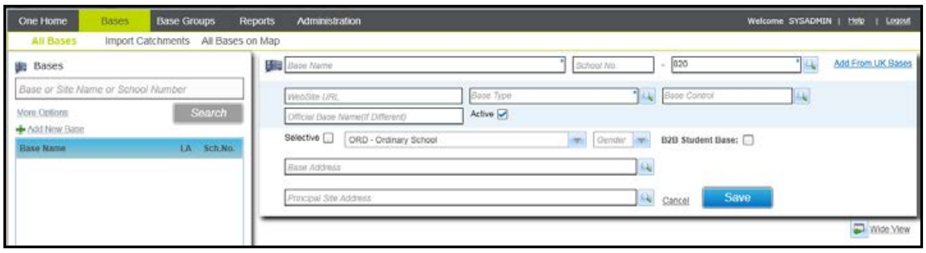
- The left-hand side displays search options.
- The right-hand side displays the base summary and base tabs.

Adding a New Base

A new base is added by clicking on the **Add New Base** link. Alternatively, you can add a new base from the UK Bases table. For more information, see Adding a New Base from UK Bases on page *14*.

To add a new base:

1. In the **All Bases** area, click the **Add New Base** link to display a blank base detail form.



4. Enter a **Base Name**.
5. Click the **Base Type** browse button to select a **Base Type**.
6. If required, enter remaining base summary information:
    a. Enter a **School No**.
    b. Enter a **Website URL**.
    c. Select a **Base Control** from the browse.
    d. Enter **Official Base Name (if Different)**.
    e. If the base is selective, select the **Selective** check box.
    f. Select a **School Type** from the drop-down (*Table ID: 0128*).
    g. Select **Gender**.
    h. If the base is a B2B Student Base, select the **B2B Student Base** check box.
    i. Click the browse to display the **Address Manager** dialog and select a **Base Address**.
    j. Click the browse to display the **Address Manager** and select a **Principal Site Address**.
7. Click the **Save** button.

If the **Principal Site Address** has not been selected, the following message is displayed:

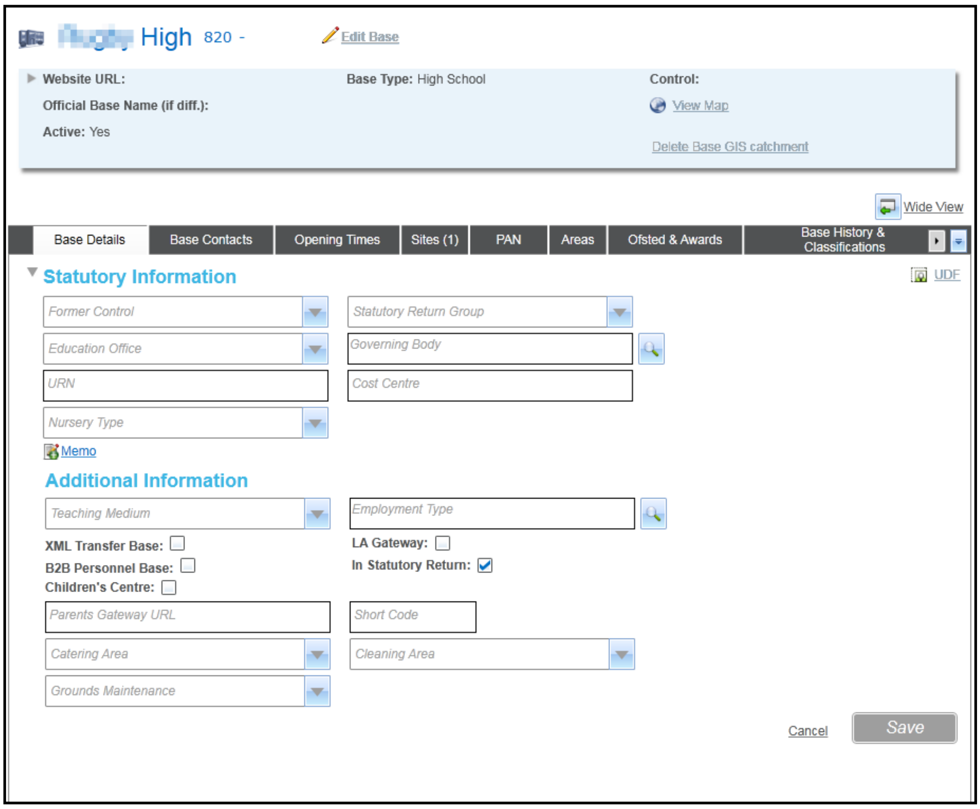
Would you like to set up a principal site of the same base name?

To set up the principal site, click the **Yes** button.

Tabs are displayed to enable the remaining base information to be entered.

Entering Base Details

Base Details is the first tab page displayed under the base summary information. The tab is divided into **Statutory Information** and **Additional Information**.



NOTE: *None of the fields are mandatory in either section.*

1. If required, enter the following in the **Statutory Information** section:
   a. Select a **Former Control** from the drop-down list (*Table ID: 0006*).
   b. Select a **Statutory Return Group** from the drop-down list (*Table ID: 0327*).
   c. Select an **Education Office** from the drop-down list (*Table ID: 0013*).
   d. Select a **Governing Body** from the browse.
   e. Enter a **URN** (Unique Reference Number).
   f. Select a **Nursery Type** from the drop-down list (*Table ID: 0432*).
   g. Enter a **Cost Centre**.
   h. If required, click the **Memo** button to display the **Base Memo** window and record a memo.
2. If required, enter the following in the **Additional Information** section:
   a. Select a **Teaching Medium** from the drop-down list (*Table ID: 0034*).
   b. Select an **Employment Type** from the browse.
   c. Select one or more of the check boxes to display a tick.
   d. Enter a **Parents Gateway URL**.
   e. Enter a **Short Code**.
   f. Select a **Catering Area** from the drop-down list (*Table ID: 0093*).
   g. Select a **Cleaning Area** from the drop-down list (*Table ID: 0091*).
   h. Select a **Grounds Maintenance** from the drop-down list (*Table ID: 0034*).
3. Click the **Save** button.
4. If required, select the following tabs to complete the base record.

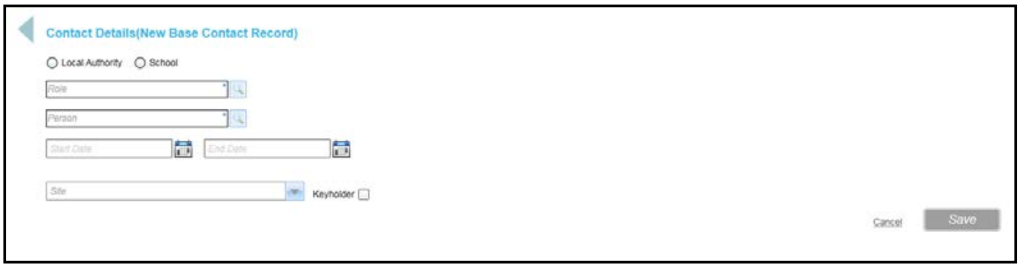
- **Base Contacts** to add a new contact. For more information, see Adding a Base Contact on page *8*.
- **Opening Times** to record term and time details for an academic year. For more information, see Recording Opening Times for a Base on page *9*.
- **Sites** to record one or more sites for the base. For more information, see Adding a New Site on page *22*.
- **PAN** to record Published Admission Numbers for an academic year. For more information, see Recording PAN Details on page *10*.
- **Areas** to record information about the teaching areas, grounds and other areas. For more information, see Recording Areas at a Base on page *11*.
- **Ofsted & Awards** to record information about awards and Ofsted reports. For more information, see Adding a New Award for a Base on page *12* and Adding a New Ofsted Report for a Base on page *12*.
- **Base History & Classifications** to record a new classification. For more information, see Recording a New Classification for a Base on page *13*.
- **Student Numbers** to record capacity, intake numbers and current student numbers. For more information, see Recording Student Numbers for a Base on page *13*.

Adding a Base Contact

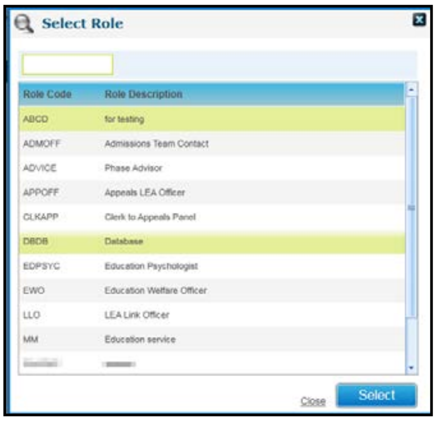
After adding the base details, the base contacts can be added. A base contact can be either a school or local authority contact. To add a new contact for a base:

1. Select a base or add a new base. For more information, see Displaying Base Details on page *16* or Adding a New Base on page *5*.
2. Select the **Base Contacts** tab.

3. Click the **Add Contact** link to display the **Contact Details (New Base Contact Record)** screen.



4. Select either the **Local Authority** or **School** radio button.
5. Click the **Role** browse button to display the **Select Role** dialog. The roles displayed are defined via the **Contact Templates** tab. For more information, see Contacts Template on page *58*.

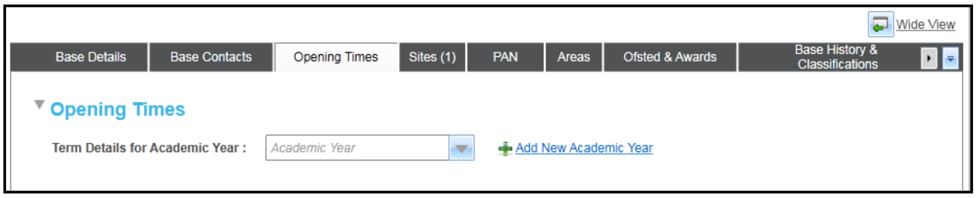


6. Highlight the required role and click the **Select** button.
7. Click the **Person** browse button to display the **Person Search** dialog and select a person.
8. If required, enter a **Start Date** for the contact.
9. If required, enter an **End Date** for the contact.
10. If the **School** radio button is selected and there is more than one site, select a **Site** from the drop-down list.
11. If this contact is a key holder, select the **Keyholder** check box.
12. Click the **Save** button.

Recording Opening Times for a Base

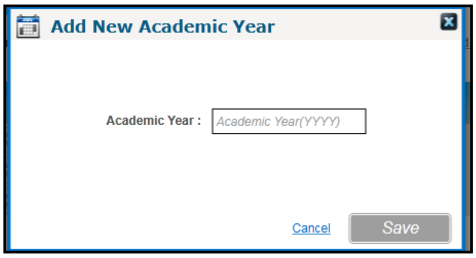
To record opening times for a base:

1. Select a base or add a new base. For more information, see Displaying Base Details on page *16* or Adding a New Base on page *5*.
2. Select the **Opening Times** tab.



3. Select an **Academic Year** from the drop-down list.

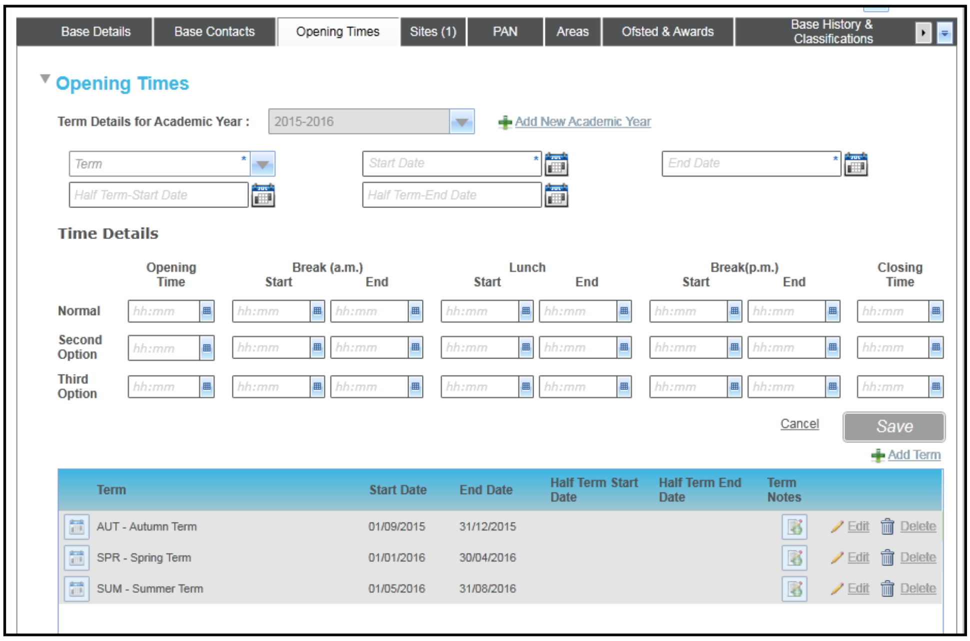
   Alternatively, to add an academic year, click the **Add New Academic Year** link.



4. To add a new term, click the **Add Term** link. For more information, see Adding a New Term for a Base on page *21*.
5. To copy term times to the same term type in the next academic year, click the **Copy Times** link. A confirmation message is displayed.
6. Click the **Yes** button to confirm.

Adding a New Term for a Base

1. Select a base or add a new base. For more information, see Displaying Base Details on page *16* or Adding a New Base on page *5*.
2. Select the **Opening Times** tab.
3. Select an **Academic Year**.
4. Click the **Add Term** link.



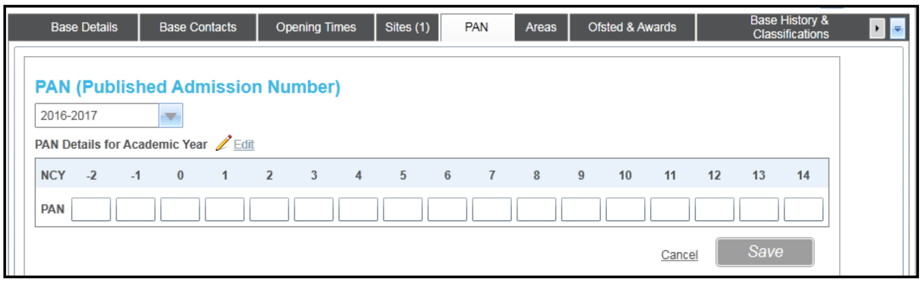
5. Click the **Term** drop-down to select a term (*Table ID: 0559*).
6. Select a **Start Date** and **End Date**.
7. If required, select a **Half Term Start Date** and **End Date**.
8. If required, enter **Time Details**.
9. Click the **Save** button.

Recording PAN Details for a Base

The **PAN** tab is used to store the **Published Admission Number** for the base for each academic year. The tab displays all NCYs from -2 to 14.

The **PAN** tab is subject to permissions. For more information, see Setting up Permissions on page *61*.

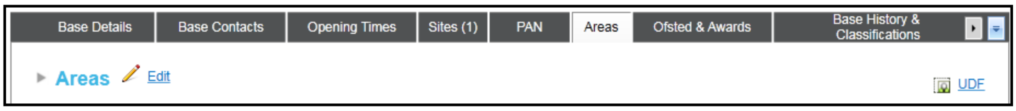
1. Select a base or add a new base. For more information, see Displaying Base Details on page *16* or Adding a New Base on page *5*.
2. Select the **PAN** tab to display the current academic year. If there are no values recorded for the current academic year, it is displayed in edit mode as shown in the following graphic:



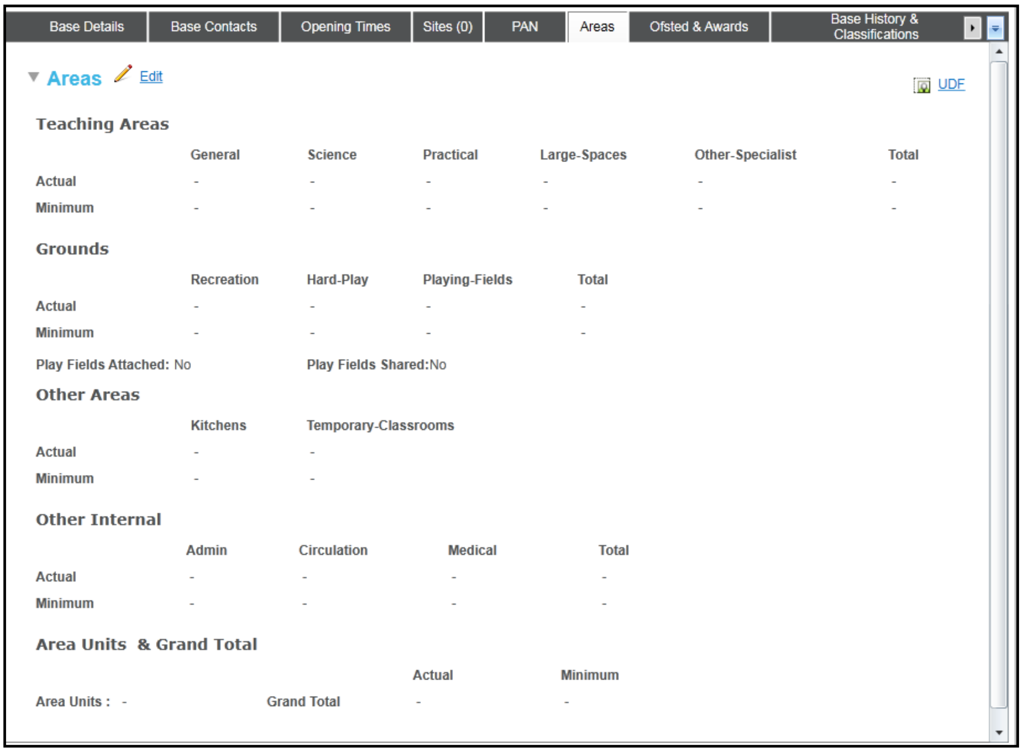
3. Enter the required Published Admission Numbers for each NCY.
4. Click the **Save** button.

Recording Areas at a Base

1. Select a base or add a new base. For more information, see Displaying Base Details on page *16* or Adding a New Base on page *5*.
2. Select the **Areas** tab.



3. Click the arrow to expand the **Areas** panel:

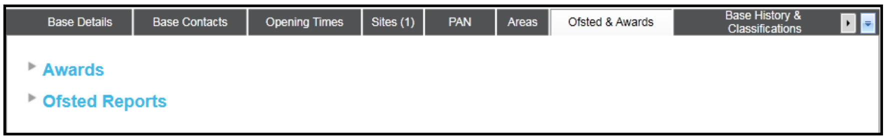


4. Click the **Edit** button.
5. Enter the required area details for **Teaching Areas**, **Grounds**, **Other Areas** and **Other Internal** areas.
6. Select the **Area Units**.
7. Click the **Save** button.

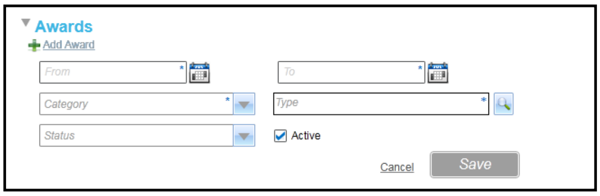
Adding a New Award for a Base

To add a new award:

1. Select a base or add a new base. For more information, see Displaying Base Details on page *16* or Adding a New Base on page *5*.
2. Select the **Ofsted & Awards** tab.



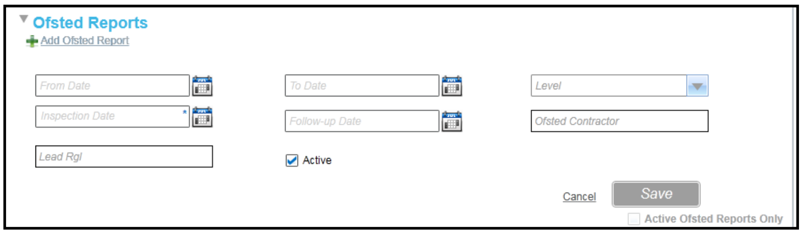
3. Click the arrow adjacent to the **Awards** heading to expand the panel.
4. Click the **Add Award** button to display the **Awards** dialog.



5. Enter a **From** and **To** date.
6. Select a **Category** (*Table ID: 0841*).
7. Select a **Type** (*Table ID: 0842*).
8. If required, select a **Status** (*Table ID: 0843*).
9. Click the **Save** button.

Adding a New Ofsted Report for a Base

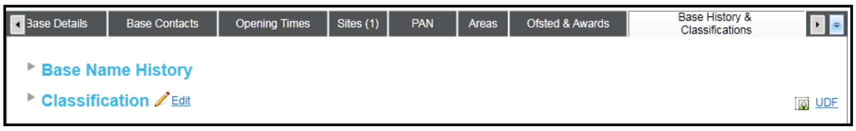
1. Select a base or add a new base. For more information, see Displaying Base Details on page *16* or Adding a New Base on page *5*.
2. Select the **Ofsted & Awards** tab.
3. Click the arrow adjacent to the **Ofsted Reports** heading to expand the panel.
4. Click the **Add Ofsted Report** button to display the **Ofsted Reports** dialog.



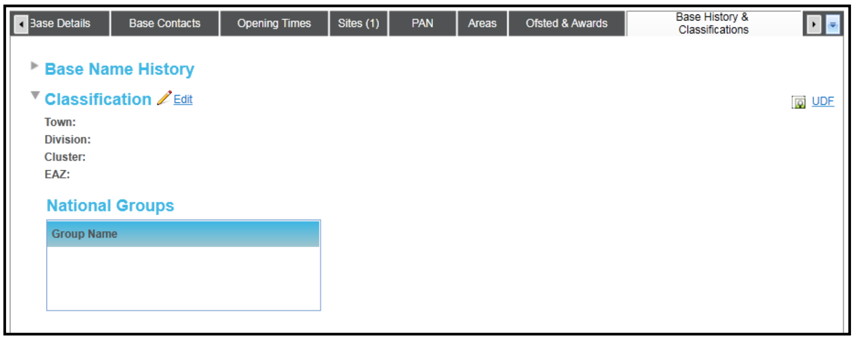
5. If required, enter a **From Date** and **To Date**.
6. If required, select a **Level** (*Table ID: 0844*).
7. Enter an **Inspection Date**.
8. If required, enter a **Follow-Up Date**, **Ofsted Contractor** and **Lead Rgl**.
9. Click the **Save** button.

Recording a New Classification for a Base

1. Select a base or add a new base. For more information, see Displaying Base Details on page *16* or Adding a New Base on page *5*.
2. Select the **Base History & Classifications** tab.



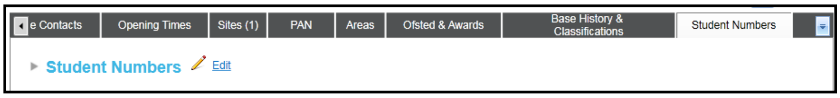
3. Click the arrow adjacent to the **Classification** heading to expand the panel.



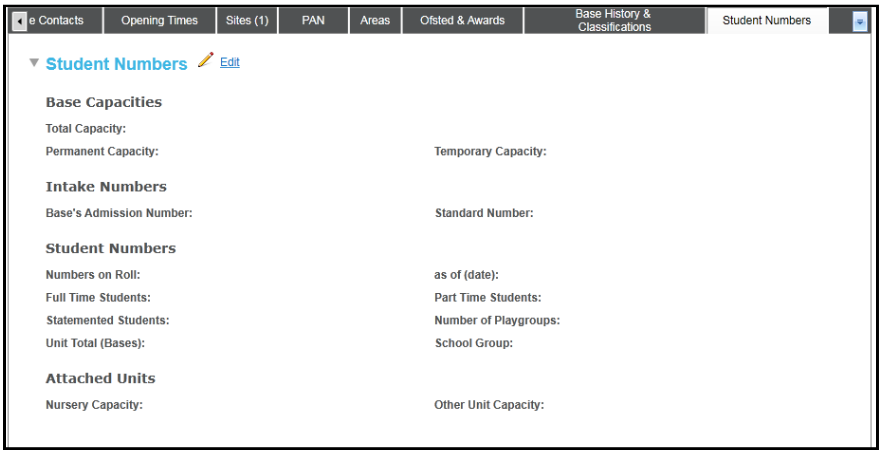
4. Click the **Edit** button
5. If required, select the adjacent browse button to select the following:
   - **Town** (*Table ID: 0531*)
   - **Division** (*Table ID: 0535*)
   - **Cluster Code** (*Table ID: 0536*)
   - **EAZ Code** (*Table ID: 0530*).
6. Click the **Save** button.

Recording Student Numbers for a Base

1. Select a base or add a new base. For more information, see Displaying Base Details on page *16* or Adding a New Base on page *5*.
2. If required, click the right scroll button or **Wide View** link to display the **Student Numbers** tab.
3. Select the **Student Numbers** tab.



4. Click the arrow adjacent to the panel heading to expand the **Student Numbers** panel.



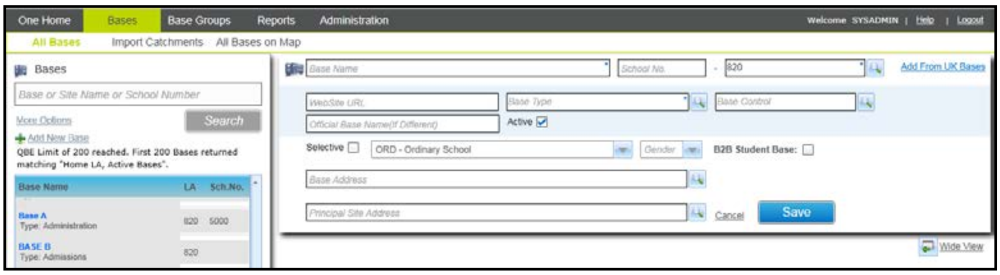
5. Click the **Edit** button to display the panel in edit mode.
6. If required, enter **Permanent** and **Temporary Capacity** to automatically calculate the **Total Capacity**.
7. If required, enter the following **Intake Numbers**:
   - **Base's Admission Number**
   - **Standard Number**.
8. If required, enter the following **Student Numbers** information:
   - **as of (date)**
   - **Part Time Students**
   - **Full Time Students**
   - **Statemented Students**
   - **Number of Playgroups**
   - **Unit Total (Bases)**
   - **School Group**.
9. If required, enter the capacity of **Attached Units**.
10. Click the **Save** button.

Adding a New Base from UK Bases

When adding a new base, you can choose to add the details from the UK Bases table.

> ***NOTE:** The UK Bases table is regularly updated with the latest English and Welsh school information as provided by the Department for Education (DfE) and the Welsh Government (WG) EduBase.*

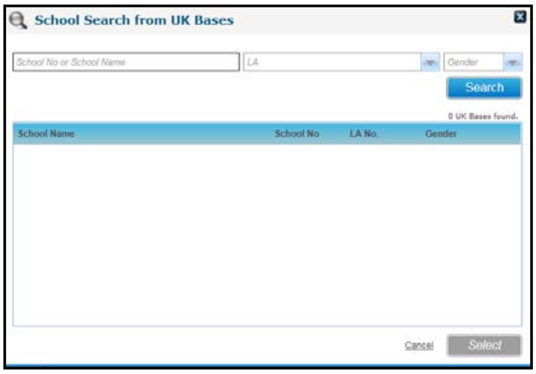
1. Click the **Add New Base** link to display the base summary for the new base.



2. Click the **Add from UK Bases** link, to display the following message:

Add Base from UK bases - Overwrite current field values. Do you wish to overwrite current field values?

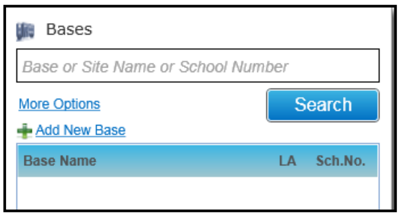
3. Click the **Yes** button to display the **School Search from UK Bases** window:



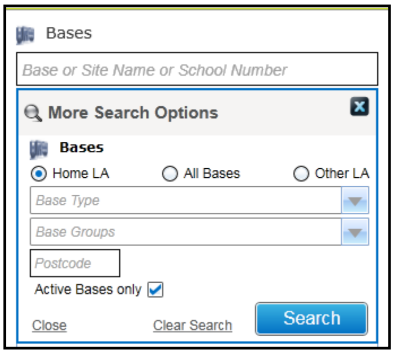
4. Enter search criteria and click the **Search** button to display a list of matching schools.
5. Highlight the required school and click the **Select** button.

Searching for a Base

You can search for a base using the base name, school name, school number or other search options.



1. In the **All Bases** area, enter a full or partial **Base** name, **Site Name** or **School Number**.
2. To enter more search options:
   a. Click the **More Options** link to display the **More Search Options** panel.

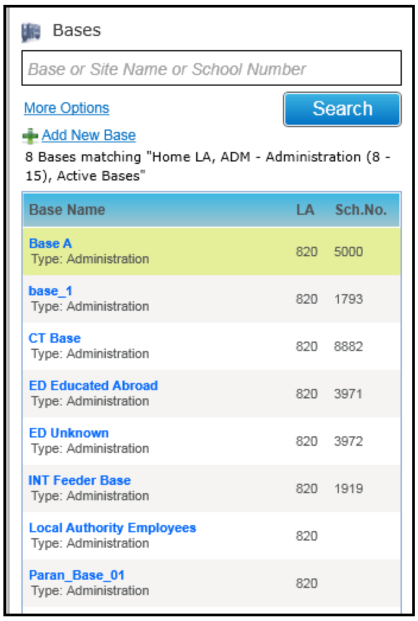


   b. Enter the required search criteria on the **More Search Options** panel. For more information, see Entering More Search Criteria on page *16*.

3. Click the **Search** button to display matches in the search result list. The first record in the list is selected and the base details are displayed on the right-hand side.

> ***NOTE:*** *Base information displayed on the right-hand side is subject to the permissions set up. For more information, see Setting up Permissions on page 61.*

The search results list is populated with matching bases. A count of matching bases and the search criteria are also displayed.



Entering More Search Criteria

When you click the **More Options** link, you can enter more search criteria as described in the following table:

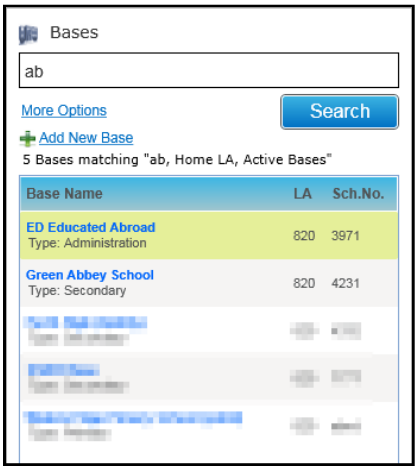
Search Criteria	Details
Home LA\All Bases\Other LA	You can restrict your search to search just **Home LA** bases, **All Bases** or **Other LA**. Selecting **Other LA** displays the **Other LA No** drop-down.
Other LA No.	This is only shown when the **Other LA** radio button is selected. This drop-down displays a list of all LAs excluding the home LA.
Base Type	A single base type can be selected from this drop-down.
Base Groups	Base groups can be chosen from this drop-down. The search will use the base group population of base group instead.
Postcode	Full or partial postcode.
Active Bases only	The search can be restricted to search on active bases. **NOTE:** Bases set as inactive, with an inactive date set to today's date or a future date <u>will</u> show in the search results.

Displaying Base Details

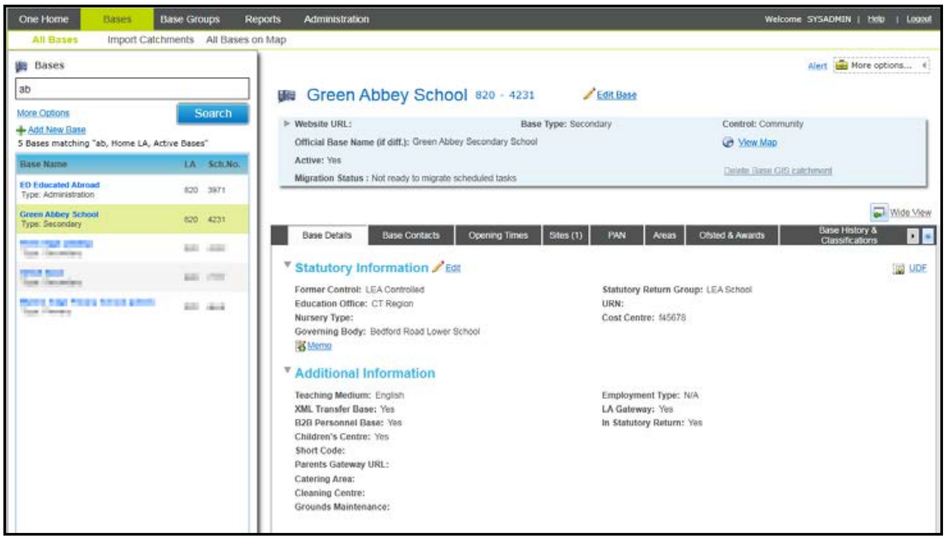
When a base is selected in the search panel on the left-hand side of the page, the base details are displayed on the right-hand side.

To display the base details:

1. Search for a base. For more information, see Searching for a Base on page *15*.



2. Select the required base to display the summary details with the **Base Details** tab selected.

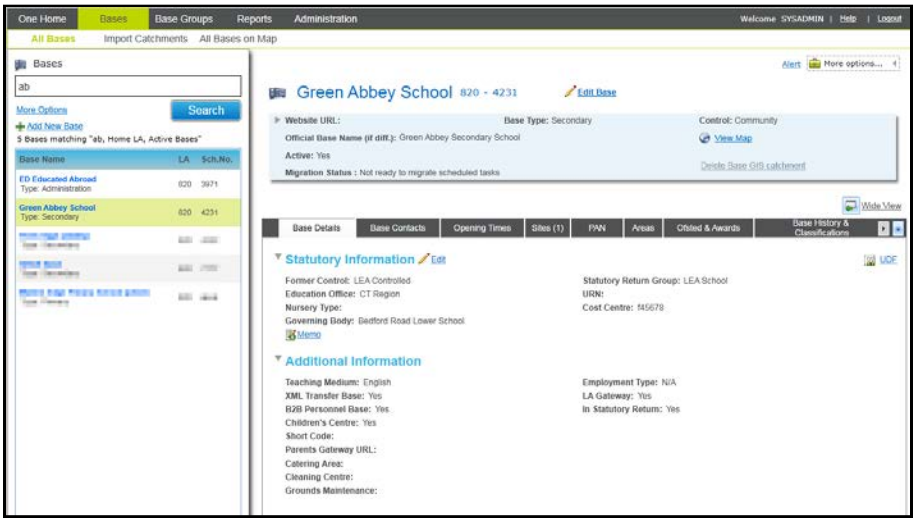


3. Select the required tab to display:
   - **Base Contacts**
   - **Opening Times**
   - **Site(s)**
   - **PAN**
   - **Areas**
   - **Ofsted & Awards**
   - **Base History & Classifications**
   - **Student Numbers**.

*NOTE: If the base address is geocoded, the **View Map** link is enabled and can be used to display the base on a map. It is subject to GIS licensing. For more information, see Viewing Bases on Map on page 31.*

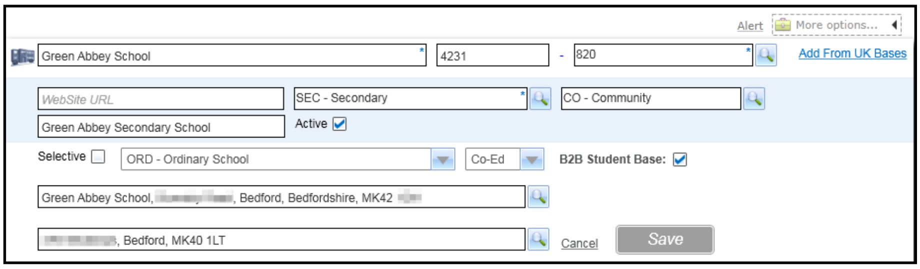
Editing a Base

The base summary and each of the tab pages can be edited.



Editing the Base Summary

1. Display the base details for the base you want to edit. For more information, see Displaying Base Details on page *16*.
2. Click the **Edit Base** link to display the base summary panel in edit mode.



3. Make the required changes.

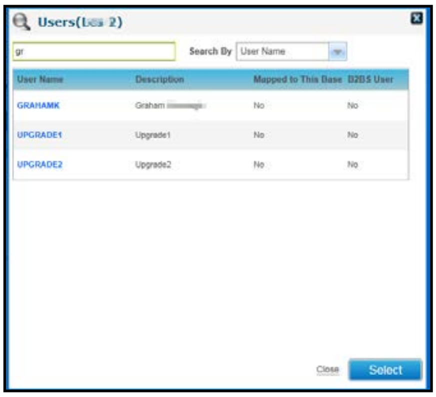
> *NOTE: If you select the **B2B Student Base** check box, the **Users** dialog is displayed to select the B2B Student base user. For more information, see Selecting a B2B Student Base User on page 18.*

4. Click the **Save** button.

Selecting a B2B Student Base User

The **B2B Student Base** check box is used to designate the base as being a B2B Student base and to select the B2B Student base user. The user is selected from a list of system users. Selecting a user maps the base to that user.

1. Display the base details for the base you want to edit. For more information, see Displaying Base Details on page *16*.
2. Select the **B2B Student Base** check box to display the **Users** dialog.

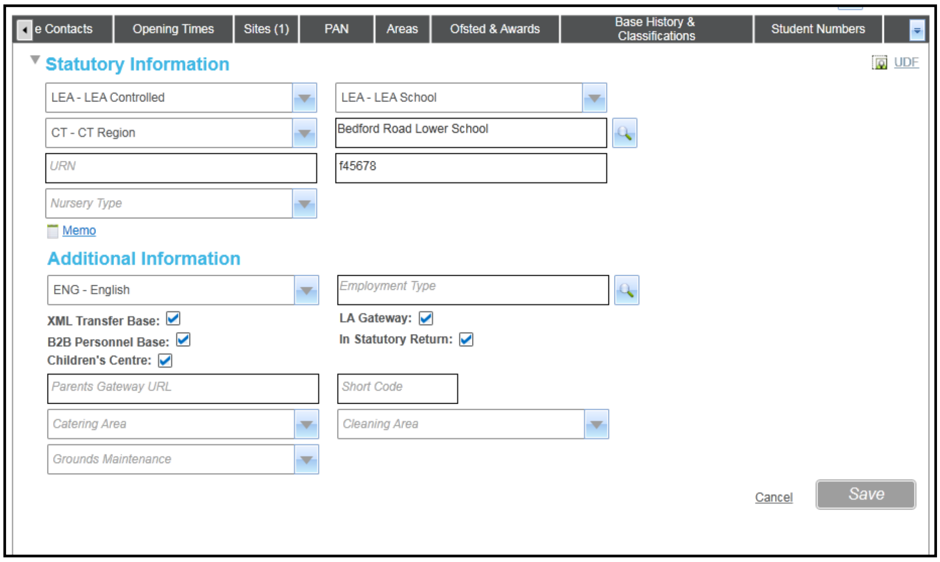


3. Select a search option from the **Search By** drop-down to change the sort order of the records displayed.
4. Enter one or more characters into the **Looking For** search to display matching records.
5. Select the required B2B Student user and click the **Select** button.

   B2B S User is set to **Yes** to indicate that this is the current B2B student base user. **Mapped to This Base** is set to **Yes** to indicate that the user is mapped to the base.

Editing Base Statutory Details

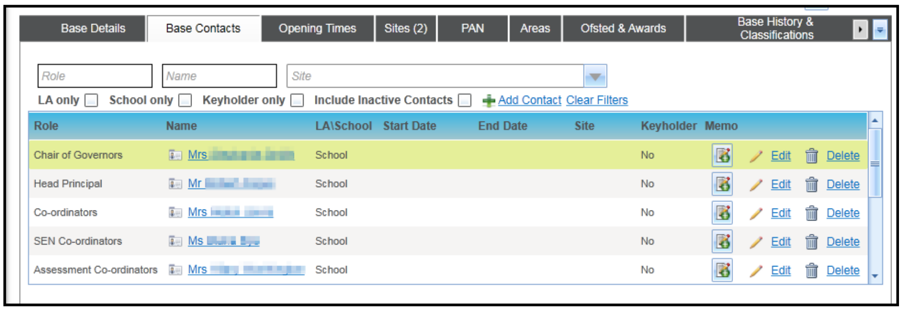
1. Display the base details for the base whose statutory details you want to edit. For more information, see Displaying Base Details on page *16*.
2. Click the **Edit** link on the **Statutory Information** panel to display the **Statutory Information** and **Additional Information** panels in edit mode.



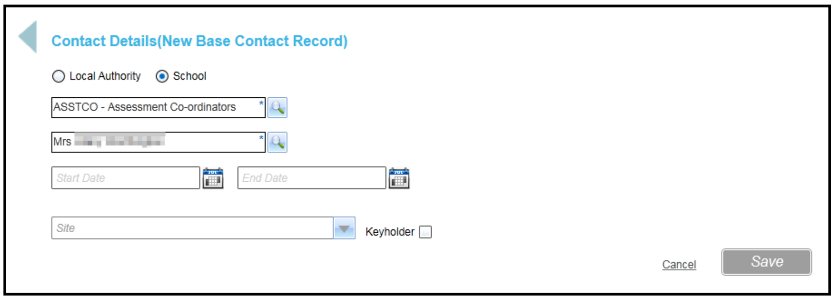
3. Make the required changes.
4. Click the **Save** button.

Editing Base Contacts

1. Display the base details for the base whose contact details you want to edit. For more information, see Displaying Base Details on page *16*.
2. Select the **Base Contacts** tab.



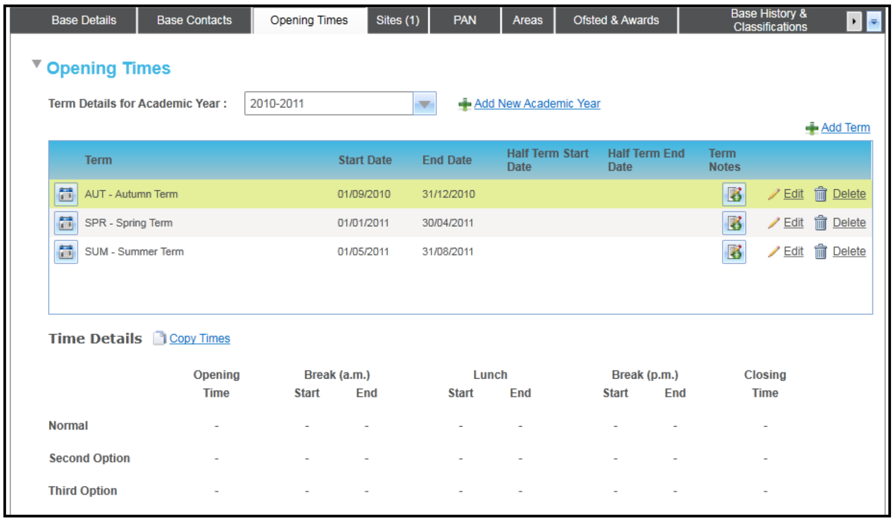
3. Click the **Edit** button for the required contact to display the **Contact Details** with editable fields.



4. Make the required changes.
5. Click the **Save** button.

Editing Term Details for a Base

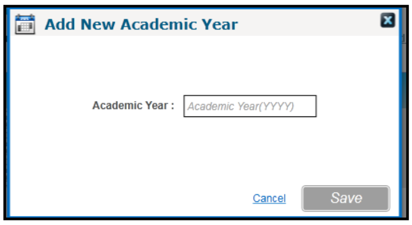
1. Display the base details for the base whose term details you want to edit. For more information, see Displaying Base Details on page *16*.
2. Select the **Opening Times** tab.



3. Select the required academic year from the drop-down.

   Alternatively, to add opening times for a new academic year:

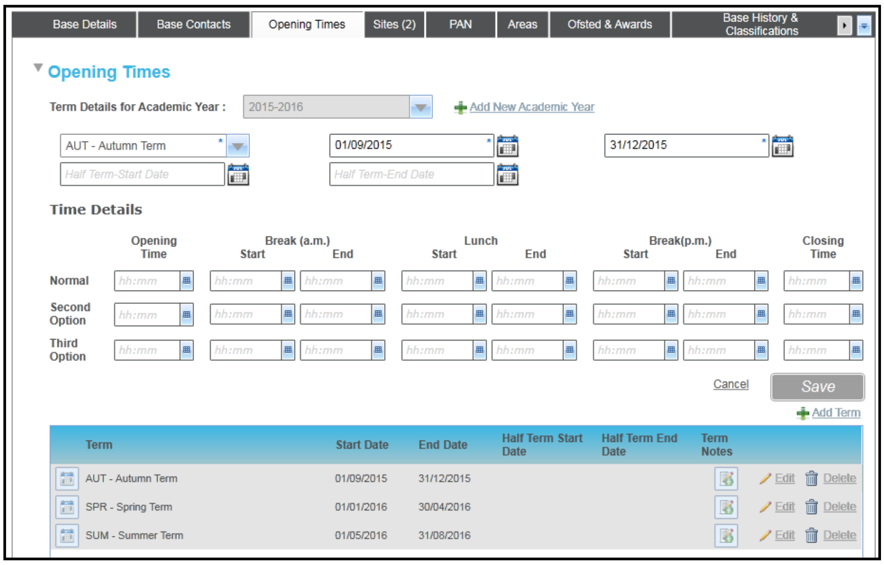
   a. Click the **Add New Academic Year** link to display the **Add New Academic Year** dialog.



b. Enter the required **Academic Year** to display the default term dates for the new academic year.

c. Click the **Save** button to record the academic year details and close the dialog.

4. Click the **Edit** button adjacent to the required term.



5. Edit the **Term Details** and **Time Details** as required.
6. Click the **Save** button.

Adding a New Term for a Base

1. Display the base details for the base whose term details you want to edit. For more information, see Displaying Base Details on page *16*.
2. Select the **Opening Times** tab.
3. Select the required academic year from the drop-down.
4. Click the **Add Term** button to display a blank **Term Details** panel.
5. Enter **Term Details** and **Time Details** as required.
6. Click the **Save** button.

Copying Term Times for a Base

Term times can be copied from one term to the same term in the next academic year.

The next academic year must already be set up.

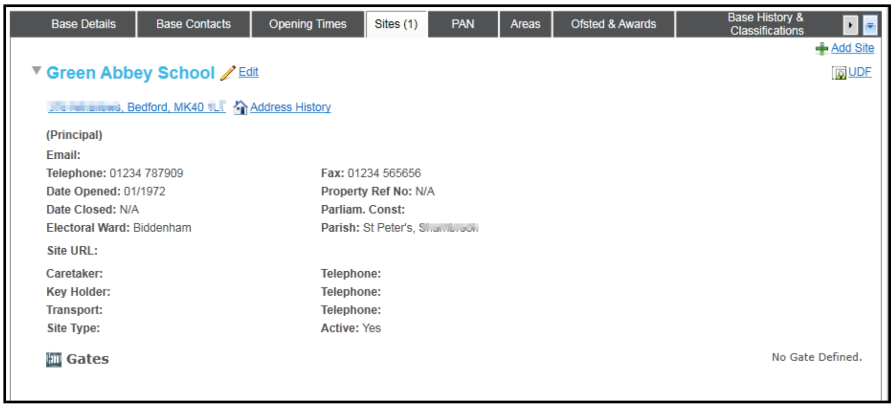
1. Display the base details for the base whose term times you want to copy. For more information, see Displaying Base Details on page *16*.
2. Select the **Opening Times** tab.
3. Select the required academic year from the drop-down.

4. Click the **Copy Times** button to display a confirmation message.
5. Click the **Yes** button.

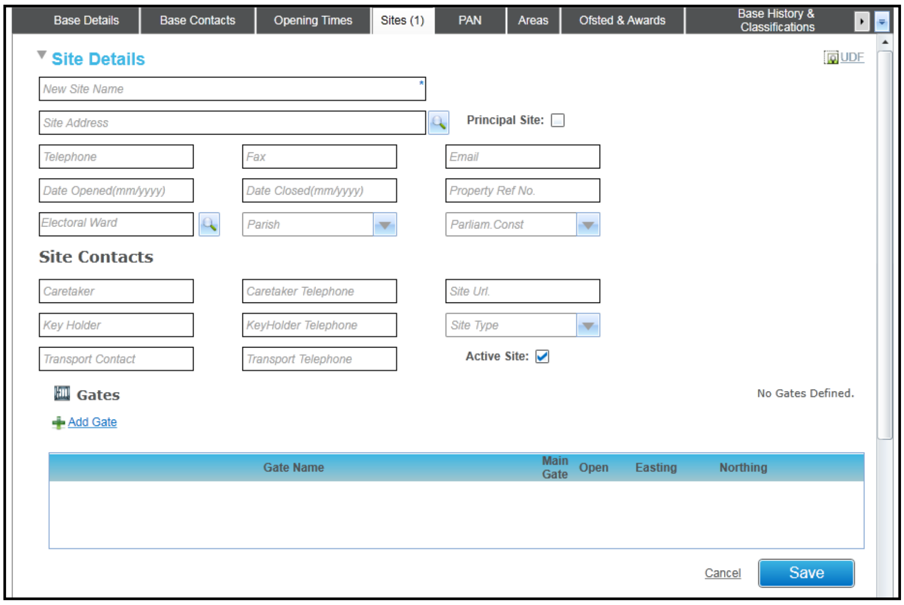
Adding a New Site for a Base

A base may have one or more sites. To add a new site to a base:

1. Display the base details for the base whose site details you want to edit. For more information, see Displaying Base Details on page *16*.
2. Select the **Sites** tab.



3. Click the **Add Site** link to display the **Site Details** panel.



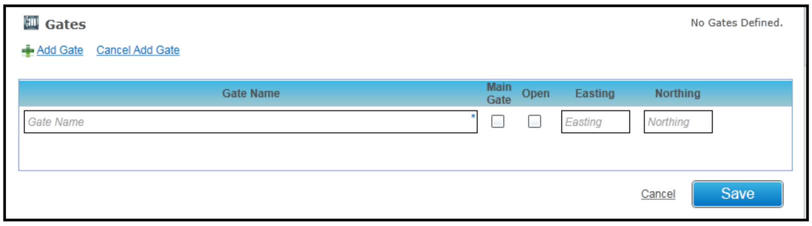
4. Enter a **New Site Name**.
5. Click the browse button to display the **Address Manager** dialog and select the **Site Address**.
6. If required, enter the following **Site Details**:
   - **Telephone** number and an alternative number
   - **Fax** number
   - **Email** address
   - **Date Opened**
   - **Property Ref No**.

- **Electoral Ward** (*Table ID: 0081*)
- **Parish** (*Table ID: 0090*)
- **Parliam. Const.** (*Table ID: 0014*).

7. If required, enter the following **Site Contacts**:
   - **Caretaker** and **Caretaker Telephone** number
   - **Key Holder** and **Keyholder Telephone** number
   - **Transport Contact** and **Transport Telephone** number
   - **Site Url**
   - **Site Type** (*Table ID: 1175*).

8. To add details of a **Gate**:

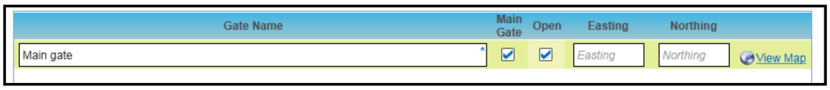
   a. Click the **Add Gate** link.



   b. Enter a **Gate Name**.

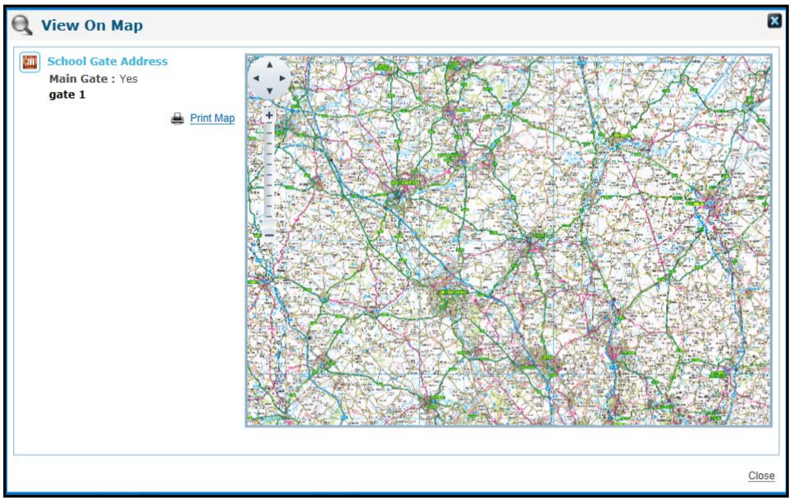
   c. If this is the main gate, select the **Main Gate** check box.

   d. If required, select the **Open** check box to display the **View Map** link.



NOTE: *The* ***View Map*** *link is only enabled for a gate if the* ***Open*** *check box is selected. It is subject to permissions.*

   e. If required, click the **View Map** link to display the **View on Map** window.



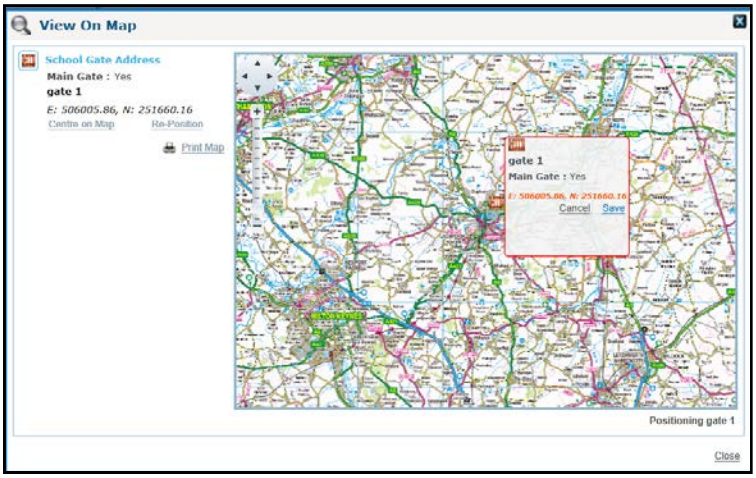
NOTE: *If the gate is geocoded it is displayed on the map with a gate button. Click on the gate button to enable the* ***Re-Position*** *link. If the gate is not geocoded, click on the gate details to enable the* ***Position*** *link:*

   f. Click the gate button to enable the **Re-Position** link.

Alternatively, click on the gate details to enable the **Position** link.

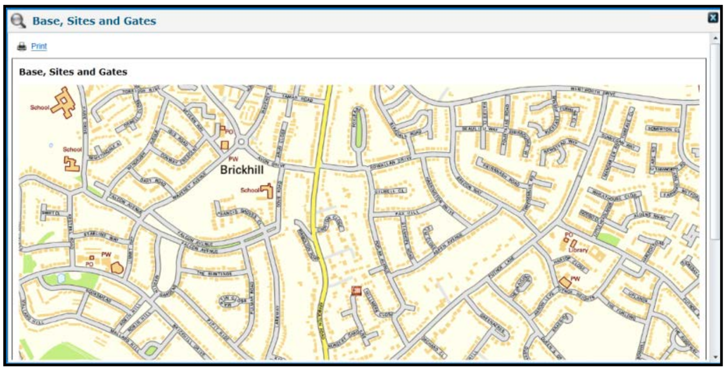
g. Click the **Position** or **Re-Position** link.

h. Click on the map to position the gate and display a dialog box.



i. Click the **Save** link to save the position of the gate including the easting and northing values.

j. If required, click the **Print Map** link to display a print preview of the gate on the map with a **Print** button to send it to the printer.

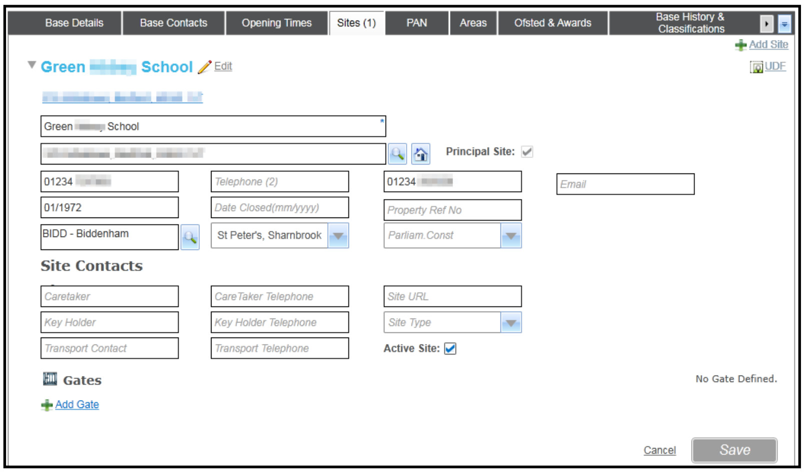


k. Click the **Close** link on the **View On Map** window to display the **Site Details** tab.

9. Click the **Save** button.

Updating Site Details

1. Display the base details for the base whose site details you want to edit. For more information, see Displaying Base Details on page *16*.
2. Select the **Sites** tab.
3. Click the **Edit** link to display the site details in edit mode.

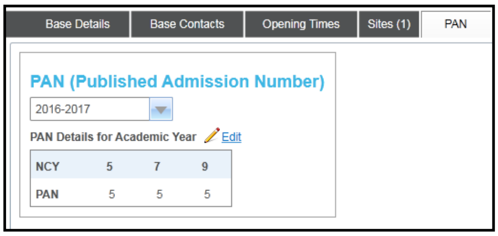


4. Update the site details and **Site Contacts** as required.
5. If required, click the **Add Gate** link to record details of a new gate.

   For information about recording site details and gates, refer to Adding a New Site for a Base on page *22*.
6. Click the **Save** button.

Updating PAN Details

1. Display the base details for the base whose PAN details you want to edit. For more information, see Displaying Base Details on page *16*.
2. Select the **PAN** tab.
3. Select an academic year from the drop-down list.

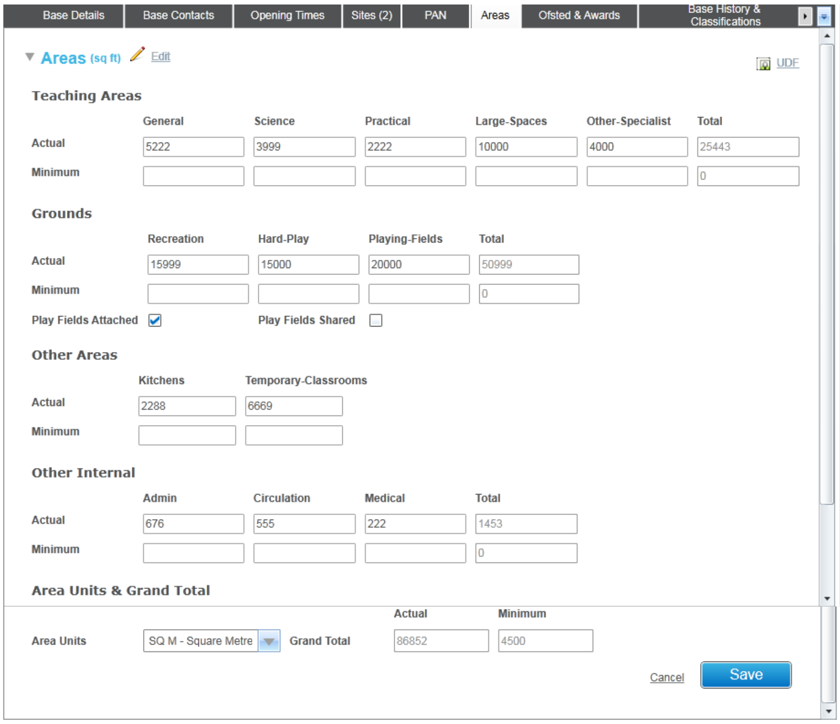


4. If required, click the year drop-down to select a different academic year.
5. If required, edit the PAN Details for the current or future years. The **PAN** tab is displayed in edit mode if no values are recorded.

   You can hover over a **PAN** value, to display a tooltip showing the corresponding age.

Updating Base Areas

1. Display the base details for the base whose areas you want to edit. For more information, see Displaying Base Details on page *16*.
2. Select the **Areas** tab.
3. Click the **Edit** link.

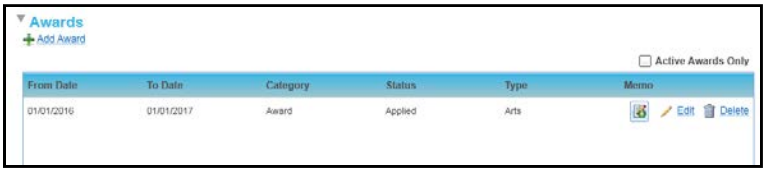


4. Make required changes to the area information.
5. Click the **Save** button.

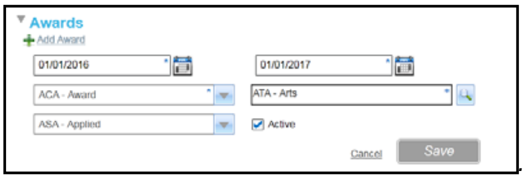
Updating Awards for a Base

Editing Award Details

1. Display the base details for the base whose award details you want to edit. For more information, see Displaying Base Details on page *16*.
2. Select the **Ofsted & Awards** tab.



3. Click the **Edit** button adjacent to the award to display the award details.



4. Update the details as required.
5. Click the **Save** button.

Deleting an Award

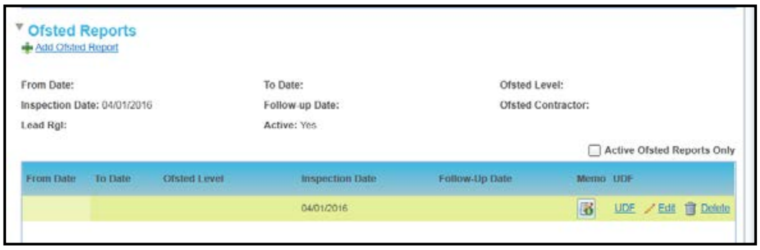
1. Display the base details for the base whose award details you want to edit. For more information, see Displaying Base Details on page *16*.
2. Select the **Ofsted & Awards** tab.
3. Click the **Delete** button to display a confirmation message.

4. Click the **Yes** button to confirm the deletion.

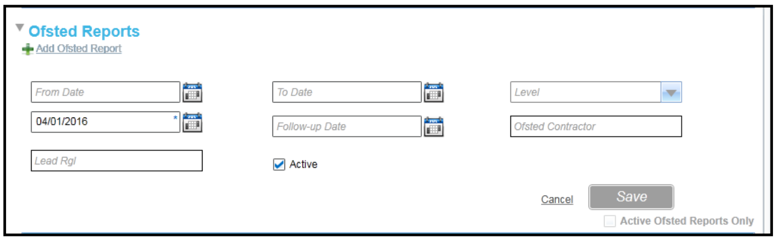
Updating Ofsted Reports for a Base

Editing an Ofsted Report

1. Display the base details for the base whose Ofsted report details you want to edit. For more information, see Displaying Base Details on page *16*.
2. Select the **Ofsted & Awards** tab.



3. Click the **Edit** button adjacent to the required report to display the report details.



4. Make the required changes.
5. Click the **Save** button.

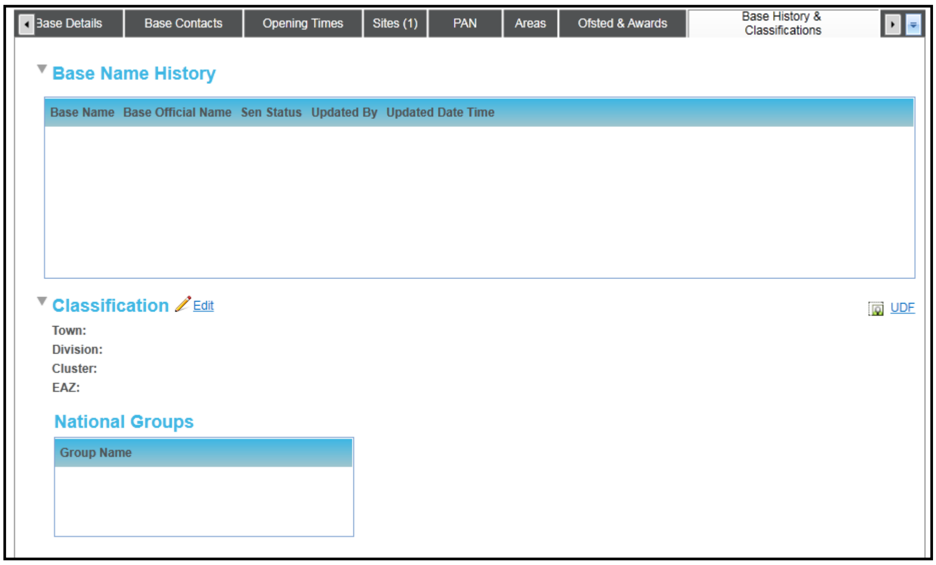
Deleting an Ofsted Report

1. Display the base details for the base whose Ofsted report details you want to delete. For more information, see Displaying Base Details on page *16*.
2. Select the **Ofsted & Awards** tab.
3. Click the **Delete** button adjacent to the required report to display a confirmation message.
4. Click the **Yes** button to confirm the deletion.

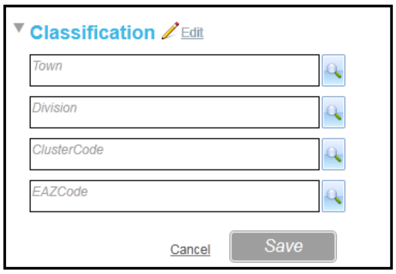
Updating Base Classification

The **Base History & Classifications** tab displays the **Base Name History**, **Classification** and **National Groups**. The **Classification** panel can be edited.

1. Display the base details for the base whose classification details you want to update. For more information, see Displaying Base Details on page *16*.
2. Select the **Base History & Classifications** tab.



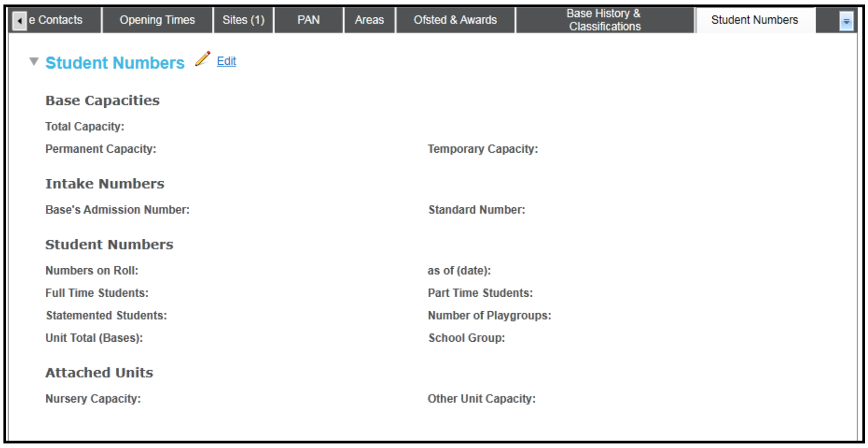
3. Click the **Edit** button on the **Classification** panel to display the editable fields.



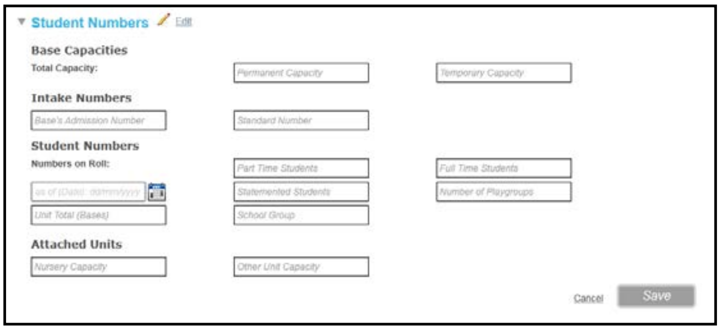
4. If required, click the adjacent browse button to select:
   - **Town** (*Table ID: 0531*).
   - **Division** (*Table ID: 0535*).
   - **Cluster Code** (*Table ID: 0536*).
   - **EAZ Code** (*Table ID: 0530*).
5. Click the **Save** button.

Updating Student Numbers

1. Display the base details for the base whose student numbers you want to update. For more information, see Displaying Base Details on page *16*.
2. Select the **Student Numbers** tab.



3. Click the **Edit** link.



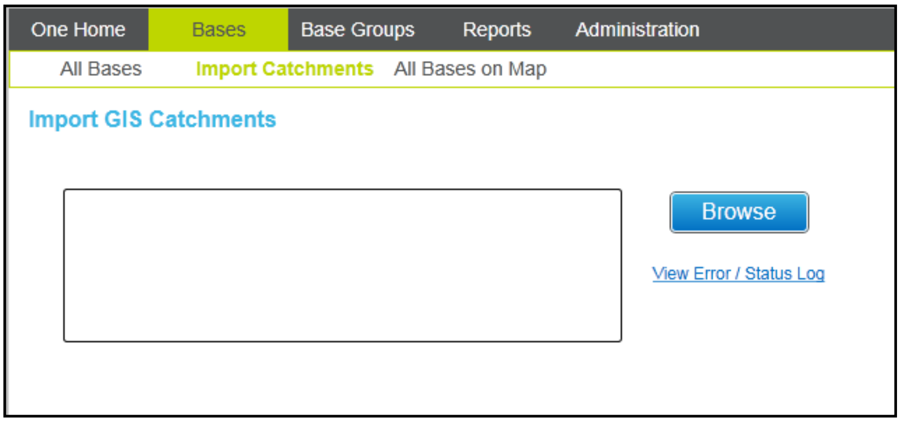
4. If required, enter **Base Capacities** (**Permanent** and **Temporary**) to automatically calculate the **Total Capacity**.
5. If required, enter **Intake Numbers**:
   - **Base's Admission Number**
   - **Standard Number**.
6. If required, enter **Student Numbers**:
   - **as of (Date)**
   - **Part Time Students**
   - **Full Time Students**
   - **Statemented Students**
   - **Number of Playgroups**
   - **Unit Total (Bases)**
   - **School Group**.
7. If required, enter capacity of **Attached Units** (**Nursery** and **Other Unit**).
8. Click the **Save** button.

Importing Catchments

Catchments for a base can be imported and then viewed on a map.

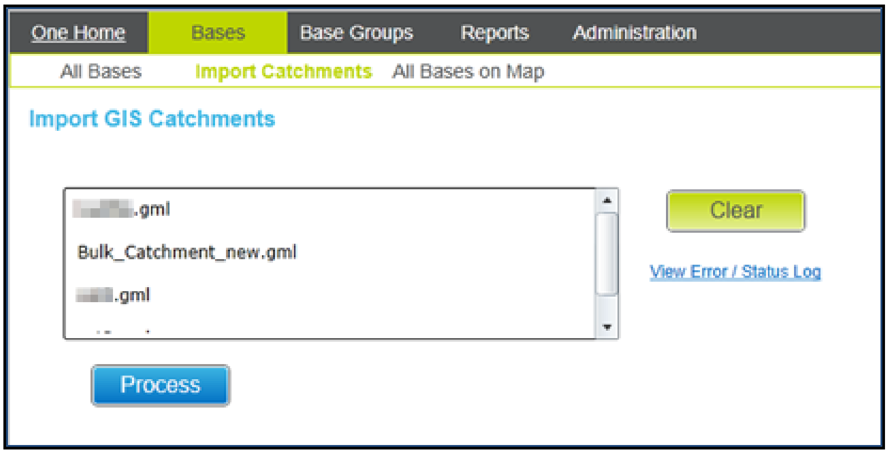
The **Bases | Import Catchments** page is used to upload catchment files.

***NOTE:** This page is subject to permissions & GIS Licensing.*

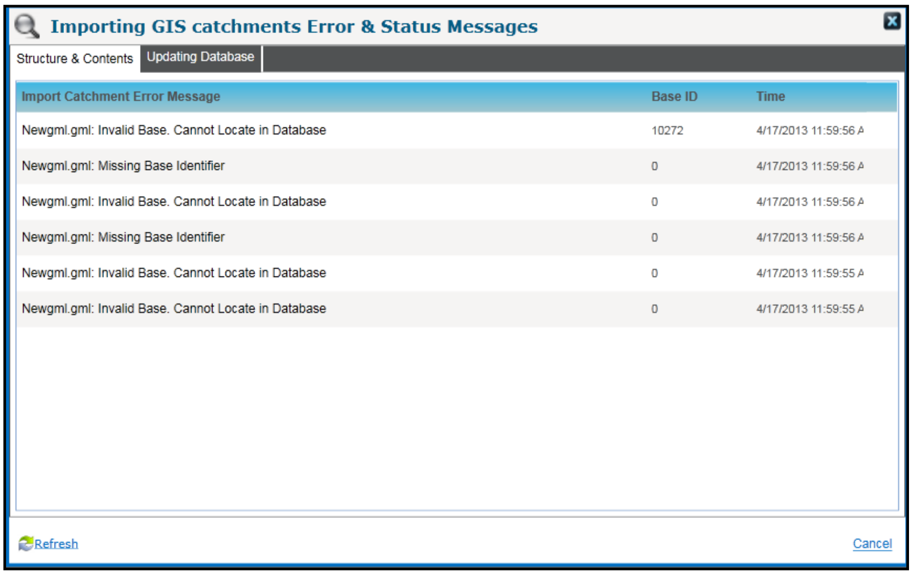


To import catchment files:

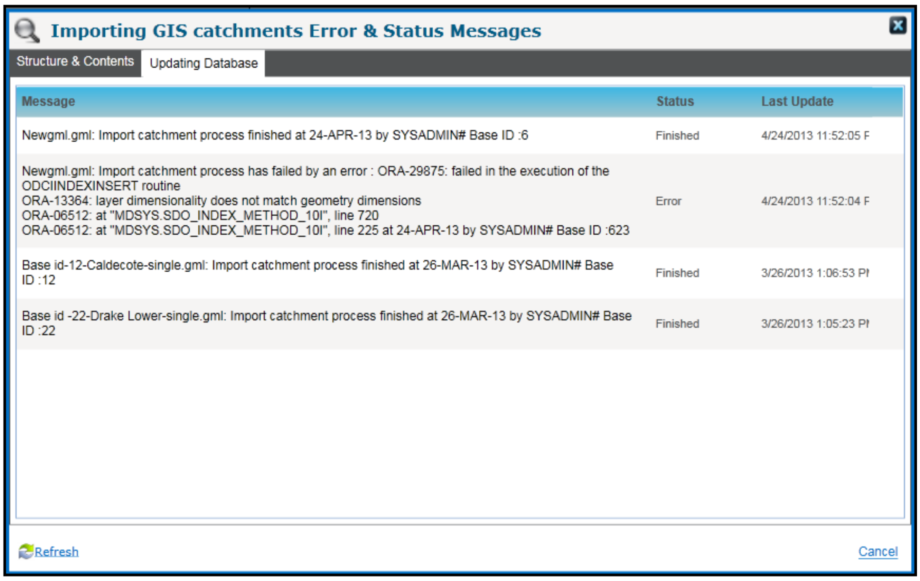
1. In the **Import Catchments** area, click the **Browse** button to display the **Open** dialog listing files with a file extension of .gml.
2. Browse to the location of the XML catchment file and select the required files.
3. Click the **Open** button to close the dialog and return to the **Import Catchments** area.



4. Click the **Process** button to validate and import the catchment files.
5. If required, click the **View Error/Status Log** link to display the **Importing GIS Catchments Error & Status Messages** window with the **Structure & Contents** tab selected.



6. If required, select the **Updating Database** tab, to view the catchments to be uploaded to the database.

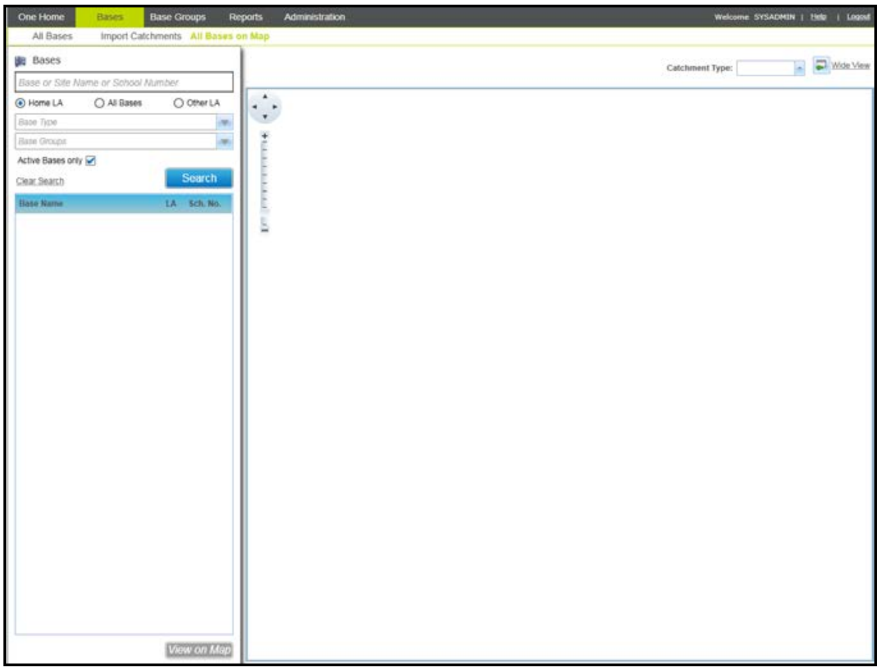


Viewing Bases on Map

Bases that are geocoded can be displayed on a GIS map. The base address is used to geocode the base. For information about geocoding an address, see Geocoding an Address on page *32*.

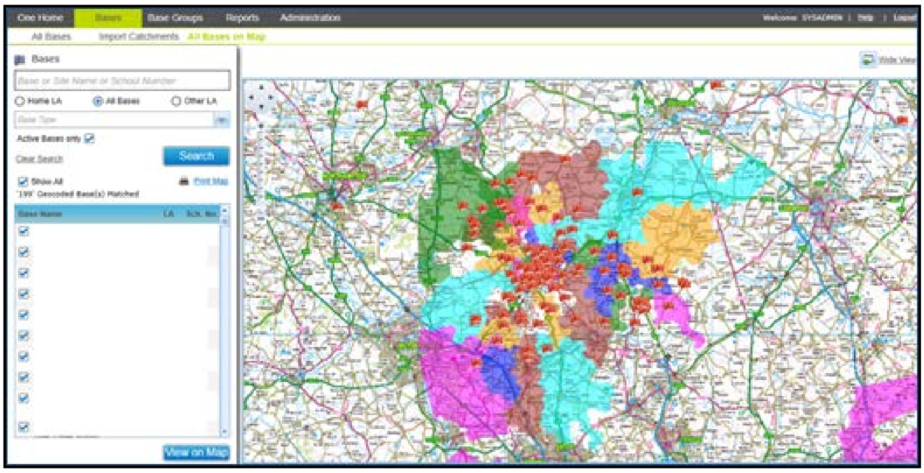
> ***NOTE:*** *The All Bases on Map functionality is subject to permissions and GIS licensing. For more information, see All Bases on Map on page 62 .*

1. Select **Bases | All Bases on Map** to display the **All Bases on Map** page.



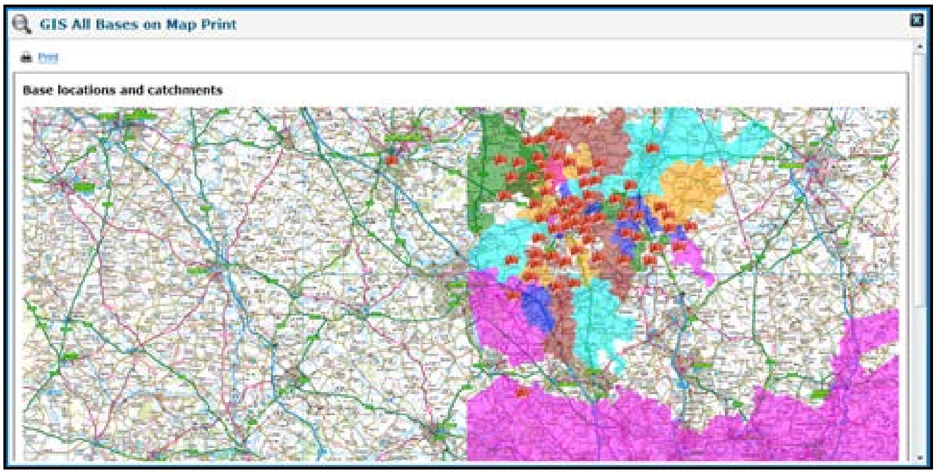
2. If required, enter one or more search criteria:
   a. Enter a full or partial **Base**, **Site Name** or **School Number**.
   b. Select the **All Bases** or **Other LA** radio button.
   c. Select a **Base Type** from the drop down.
   d. Select a **Base Group** from the drop-down.
3. Click the **Search** button to display a list of matching bases.

4. Select one or more check boxes adjacent to the required bases.
5. If required, select a **Catchment Type** from the drop-down list.
6. Click the **View on Map** button to display the selected geocoded bases and associated catchments.



Printing a Map

1. Open the map that you want to print. For more information, see Viewing Bases on Map on page *31*.
2. Click the **Print Map** link to show a print preview of the map with the selected geocoded bases and their associated catchments.



3. Click the **Print** button to send the print preview to the printer.

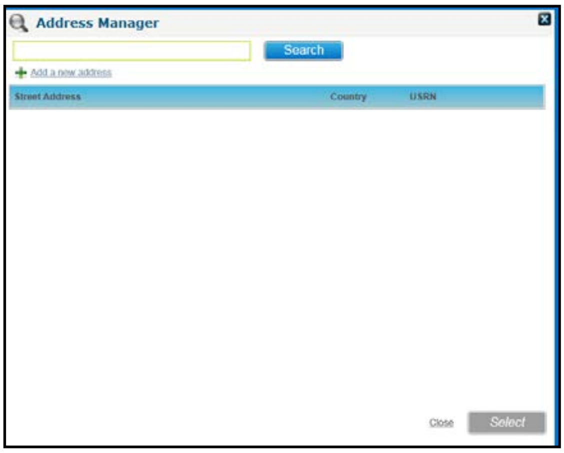
Geocoding an Address

If an address has not been geocoded, GIS v4 can set the Easting and Northing coordinates. It is activated from the **Address Manager** screen when editing a base or site address.

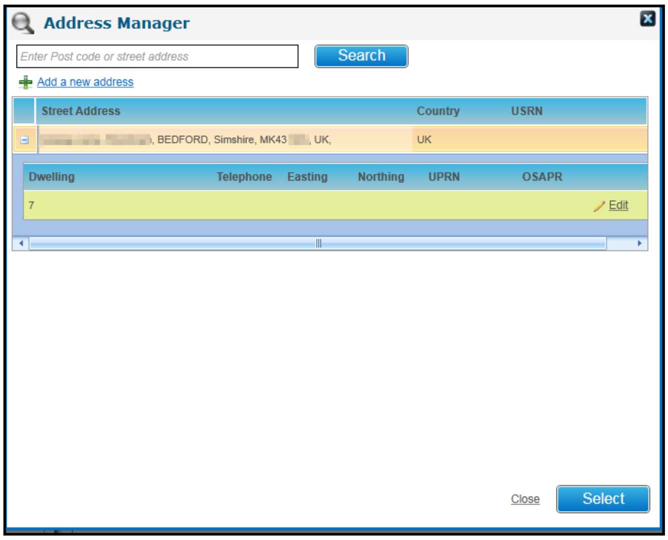
> ***NOTE:*** *A GIS licence must be installed and permissions set up. For more information, see* *All Bases on Map on page 62.*

1. Display the base details for the base whose address details you want to edit. For more information, see Displaying Base Details on page *16*.
2. Click the browse button adjacent to the base address or principal site address to display the **Address Manager** dialog.

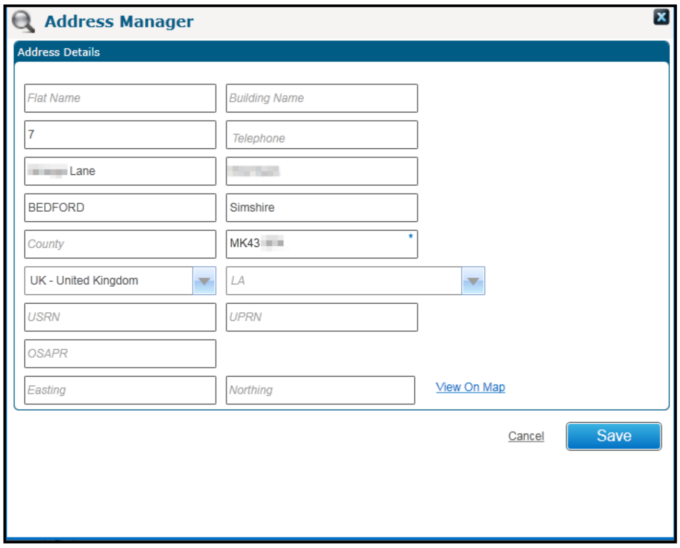
Alternatively, select the **Sites** tab to edit the site address for another site. For more information, see Updating Site Details on page *24*.



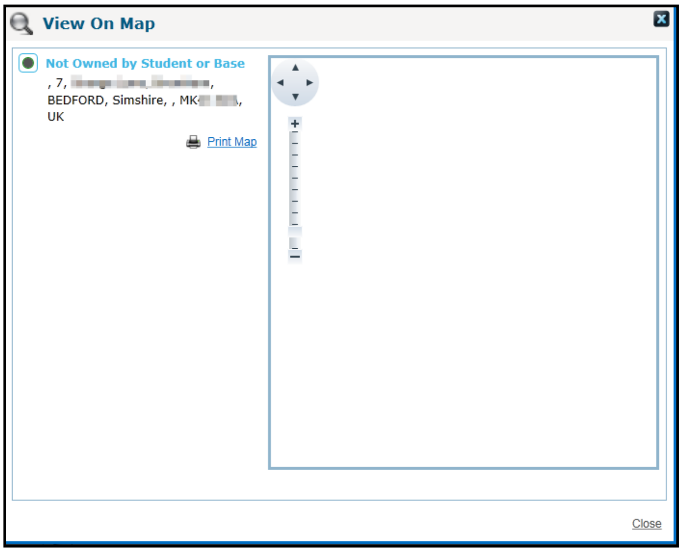
3. Enter two or more characters of the address and click the **Search** button to display a list of matching addresses.
4. If required, expand the required address to display the details.



5. Click the **Edit** button.



6. Click the **View on Map** button to display the **View on Map** dialog.



7. Click on the base name to display the **Position** link.
8. Click the **Position** link.
9. Click on the map to position the base and update the Easting and Northing.

10. If required, to re-position the address, click on the **Re-Position** link and click on the map.
11. Click the **Save** button.

03 | Managing Base Groups

Introduction

The **All Base Groups** page provides a base group search and enables base groups to be created and amended. It is displayed when you select the **Base Groups** area.

Permissions Required for Base Groups

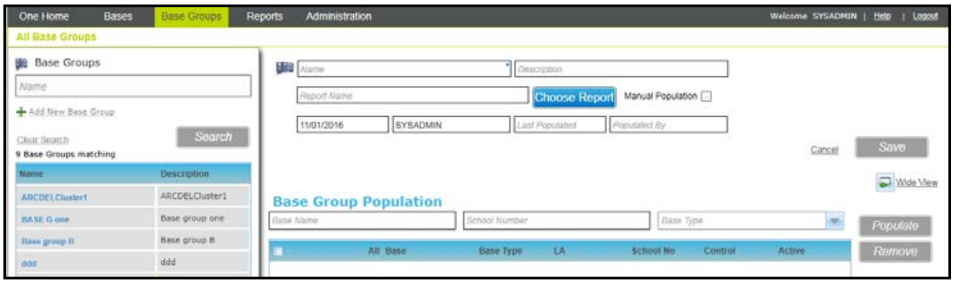
Viewing Base Groups

To view base group information, a user must have **Read** access to the **Base Groups** business process under the **Base Groups Administration** main business process. Additional permissions are required to add or update base groups. For more information, see Base Groups on page *63*.

Adding a New Base Group

To add a new base group:

1. Select the **Base Groups** area to display the **All Base Groups** page.
2. Click the **Add New Base Group** link to display the base group summary panel.



3. Enter a **Name**.
4. If required, enter a **Description**.
5. Populate the base group by choosing a report. For more information, see Using a Report to Populate a Base Group on page *35*.

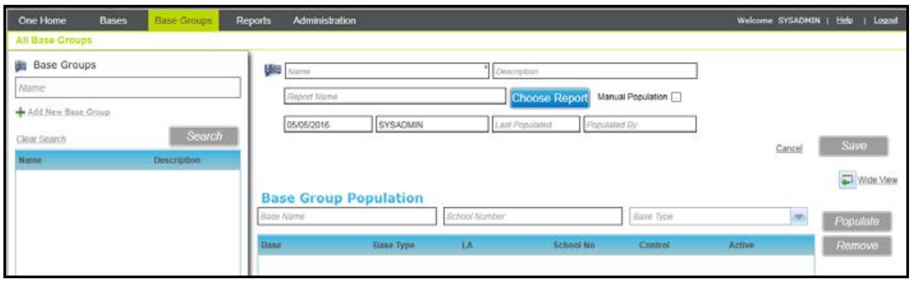
   Alternatively, you can populate the group manually. For more information, see Manually Populating a Base Group on page *36*.
6. Click the **Save** button.

Populating a Base Group

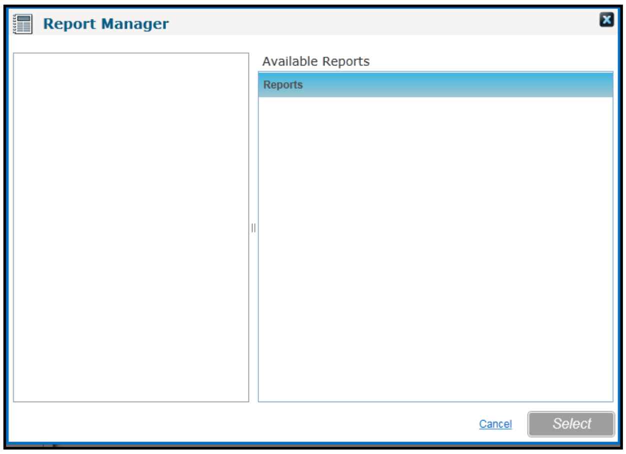
A new base group can be populated by using reports selection criteria. Alternatively, it can be populated by manually selecting the bases.

Using a Report to Populate a Base Group

1. Display the base group summary panel in add or edit mode. For more information, see Displaying a Base Group on page *37*.



2. Click the **Choose Report** button to display the **Report Manager** dialog.

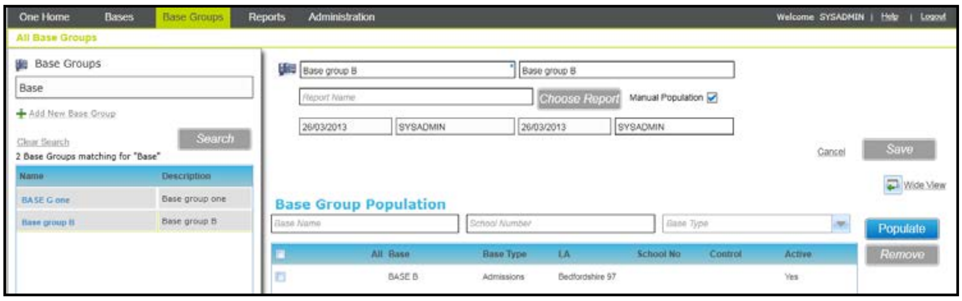


3. Select a report type in the left-hand panel to display a list of **Available Reports**.
4. Highlight a report in the right-hand panel and click the **Select** button.
5. Click the **Populate** button.

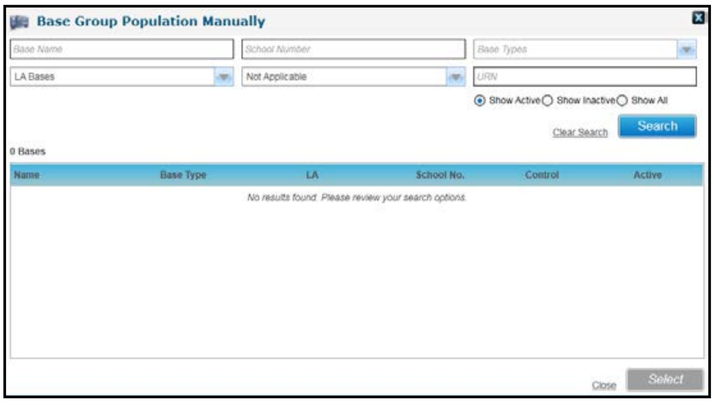
Manually Populating a Base Group

To populate the base group manually:

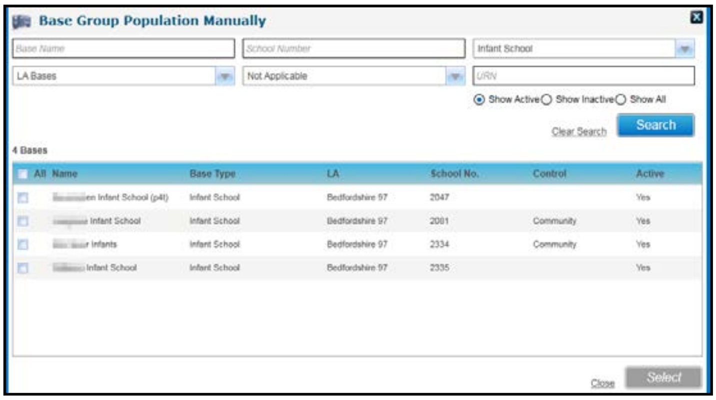
1. Display the base group summary panel in add or edit mode. For more information, see Displaying a Base Group on page *37*.
2. Select the **Manual Population** check box. If the group was previously populated using a report, a confirmation message is displayed. Click the **Yes** button to clear the existing population.



3. Click the **Populate** button to display the **Base Group Population Manually** dialog.



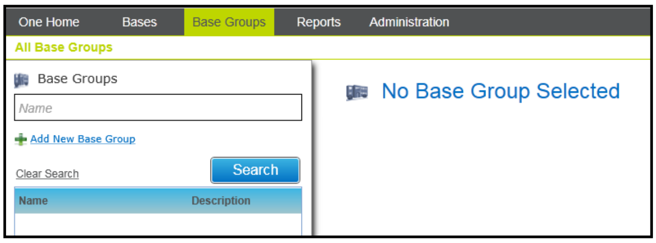
4. Enter search criteria and click the **Search** button to display a list of matching bases.



5. Select one or more check boxes for the required bases. Alternatively, select the **All** check box.
6. Click the **Select** button.

Searching for a Base Group

1. Select the **Base Groups** area to display the search panel.

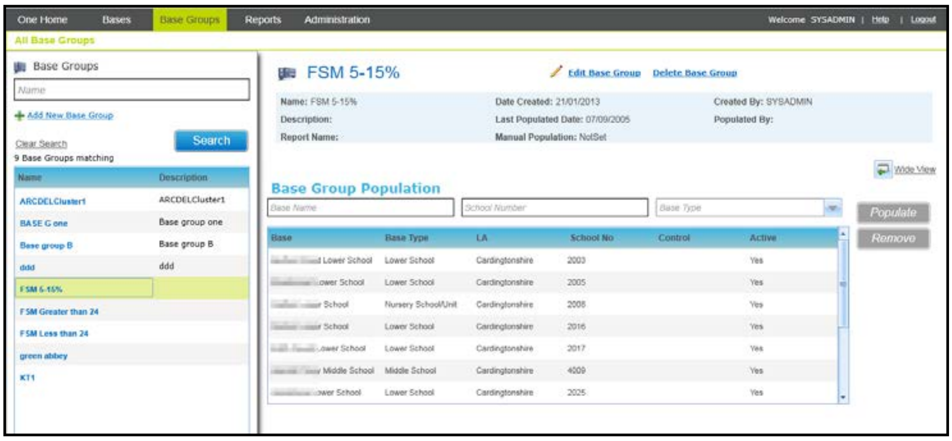


2. Click the **Search** button to display all base groups, or enter one or more characters of the base group **Name** and click the **Search** button.
3. A list of records matching the search criteria is displayed, showing the **Base Group Name** and **Description**.

Displaying a Base Group

To display the base group details:

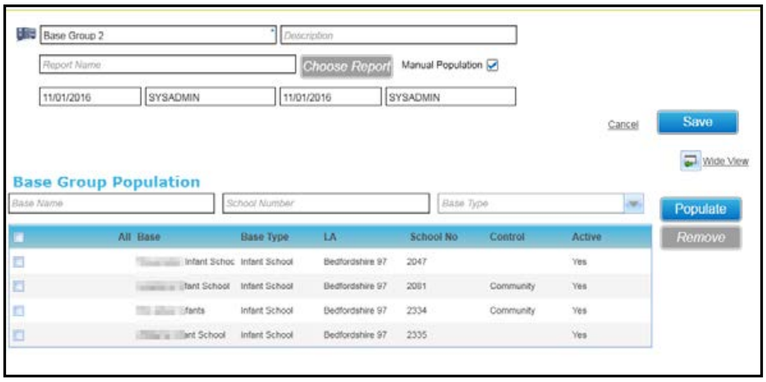
1. Search for a base group. For more information, see Searching for a Base Group on page *37*.
2. The first group in the list is selected. Select another group to display the details.



Editing a Base Group

The **Description** and **Base Group Population** of a base group can be edited. If the base group was populated using a report, this can be changed to manual population or a different report can be used. Changing how the group is populated clears the existing population. Individual bases can be removed from the group.

1. Display the required base group. For more information, see Displaying a Base Group on page *37*.
2. Click the **Edit Base Group** link to display the base summary in edit mode.



3. If required, update the **Description**.
4. To change from manual population to using a report, deselect the **Manual Population** check box and click the **Choose Report** button. A confirmation message is displayed. For more information, see Using a Report to Populate a Base Group on page *35*.

   Alternatively, to change to manual population, select the **Manual Population** check box. A confirmation message is displayed. For more information, see Manually Populating a Base Group on page *36*.
5. If required, select one or more check boxes adjacent to a base and click the **Remove** button.
6. Click the **Save** button.

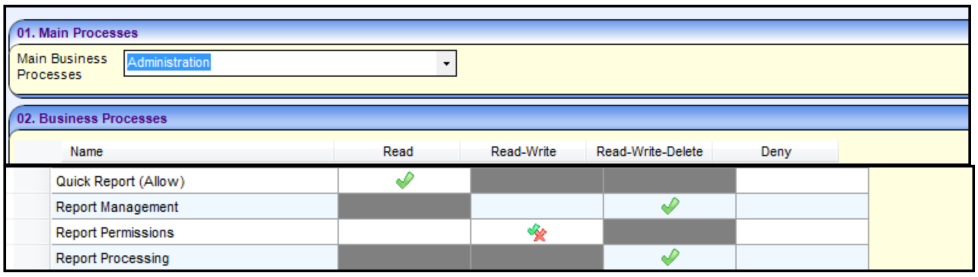
04 | Using Reports

Introduction

The **Reports** area enables you to create a new report using a Crystal Report file. The report can be submitted and the results displayed.

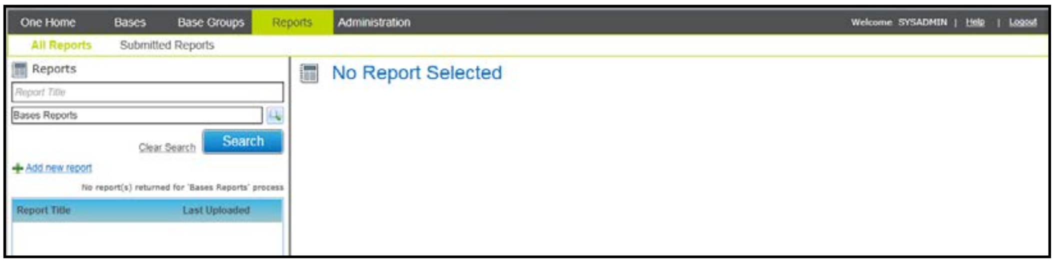
Permission Required for Reports

Full Permissions will need to be granted to the **Quick Report (Allow)**, **Report Management**, **Report Permissions** and **Report Processing** business processes under the **Administration** main business process. Without these permissions the **Reports** menu option is not displayed. For more information, see Setting up Permissions on page *61*.

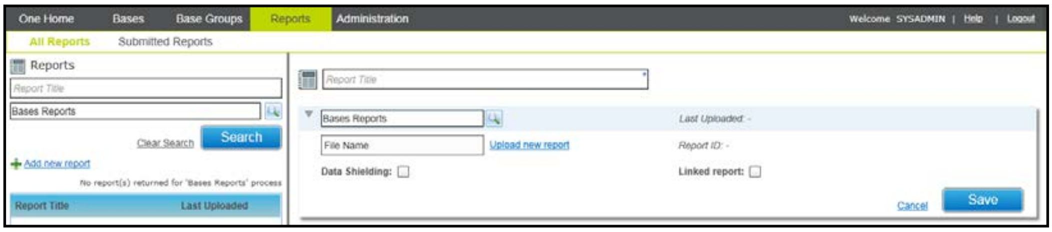


Adding a New Report

1. Click the **Reports** menu button to display the **All Reports** page.



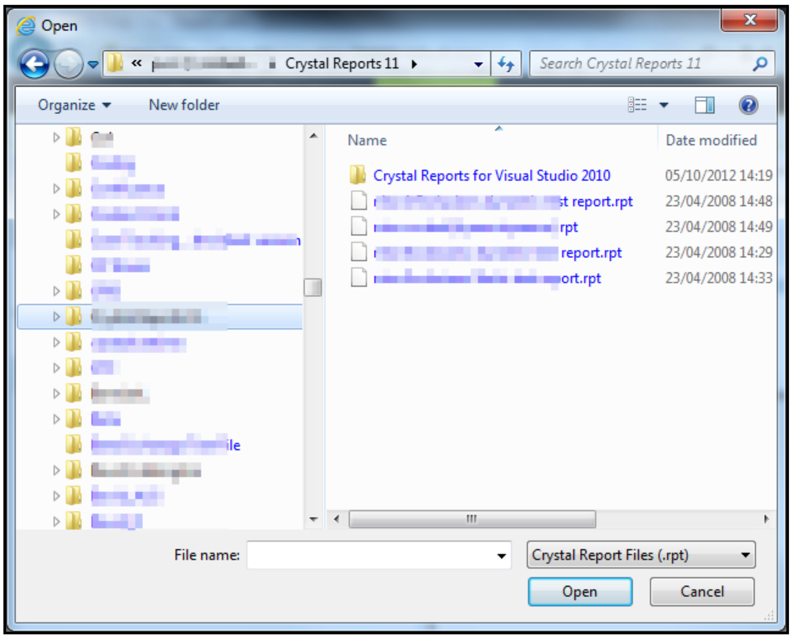
2. Click the **Add new report** link to display the report summary.



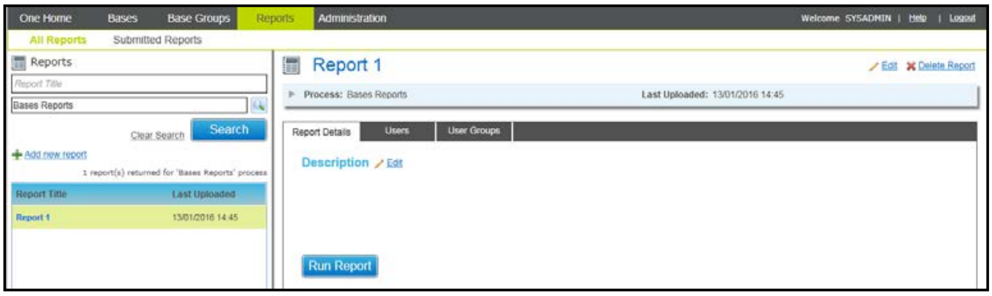
3. Enter a **Report Title**.

   The process is set to **Bases Reports**.

4. Click the **Upload new report** link to display an **Open** file dialog.



5. Select a Crystal Report file and click the **Open** button.
6. Click the **Save** button.



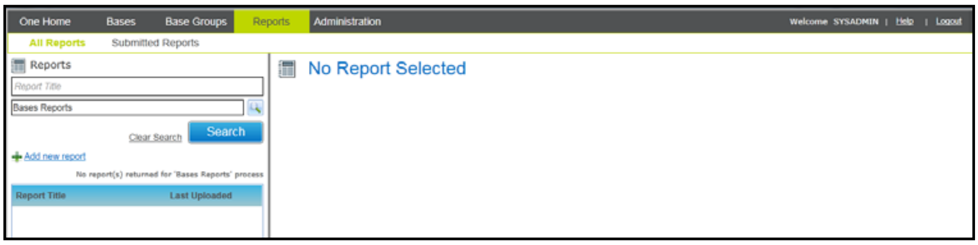
The following tabs are displayed beneath the report summary:

- **Report Details**.
- **Users**.
- **User Groups**.

7. If required, add report details:
   a. Select the **Report Details** tab.
   b. Click the **Edit** button.
   c. Enter a **Description**.
   d. Click the **Save** button.

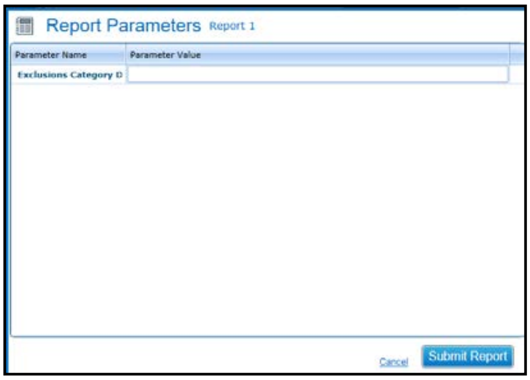
Running a Report

1. Click the **Reports** button to display the **All Reports** page.



2. If required, enter a full or partial **Report Title** and click the **Search** button.
3. Highlight the required report.
4. Ensure that the **Report Details** tab is selected.
5. Click the **Run Report** button.

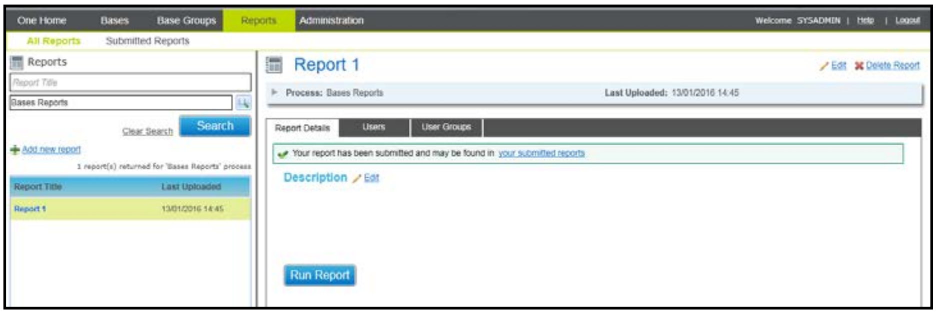
   If the report has parameters, the **Report Parameters** dialog is displayed.



   a. Enter a **Parameter Value**.
   b. Click the **Submit Report** button.

   The following message is displayed:

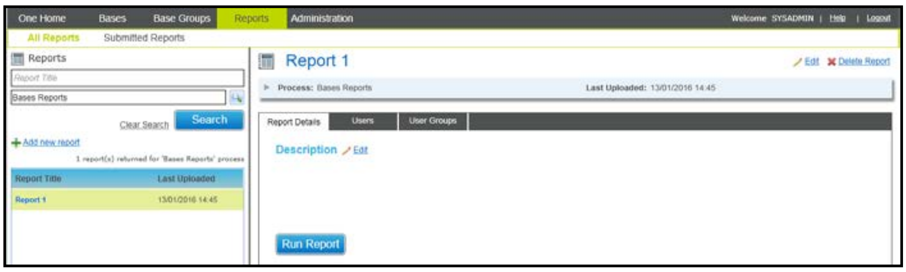
   > Your report has been submitted and may be found in **<u>your submitted reports</u>**.



6. If required, click the **your submitted reports** link to display the **Submitted Reports** page.

Viewing Submitted Reports

1. Select the **Reports** tab to display the **All Reports** page.



2. Select the **Submitted Reports** tab to display a list of reports in order of date and time submitted.

3. If required, click the **View Report** button to display the report.

Deleting a Report

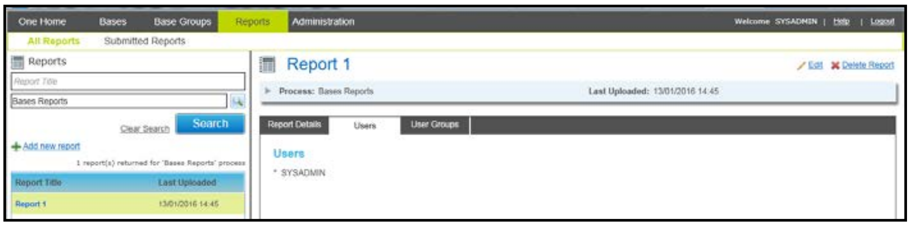
1. View a list of submitted reports. For more information, see Viewing Submitted Reports on page *41*.
2. Click the **Delete** button adjacent to the required report. A confirmation message is displayed.
3. Click the **Yes** button to confirm.

Displaying Report Users

When a Login ID is assigned and the user details are saved, a User ID is generated.

To display the User ID of report users:

1. Select the **Reports** tab to display the **All Reports** page.
2. If required, enter search criteria and search for the report:
   a. Enter a **Report Title**.
   b. Click the **Select Process** browse button and select a process.
   c. Click the **Search** button.
3. Highlight the required report.
4. Select the **Users** tab to display a list of User IDs.



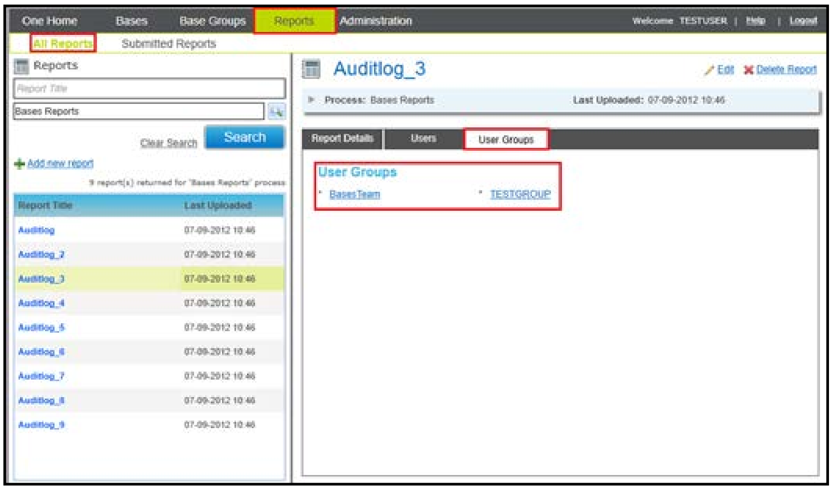
Displaying User Groups

The **Users Groups** tab displays user group information.

NOTE: *This tab is only enabled for System Administrators.*

1. Select the **Reports** tab to display the **All Reports** page.
2. If required, enter a full or partial **Report Title** and click the **Search** button.
3. Highlight the required report.

4. Select the **User Groups** tab to display a list of **User Groups**.

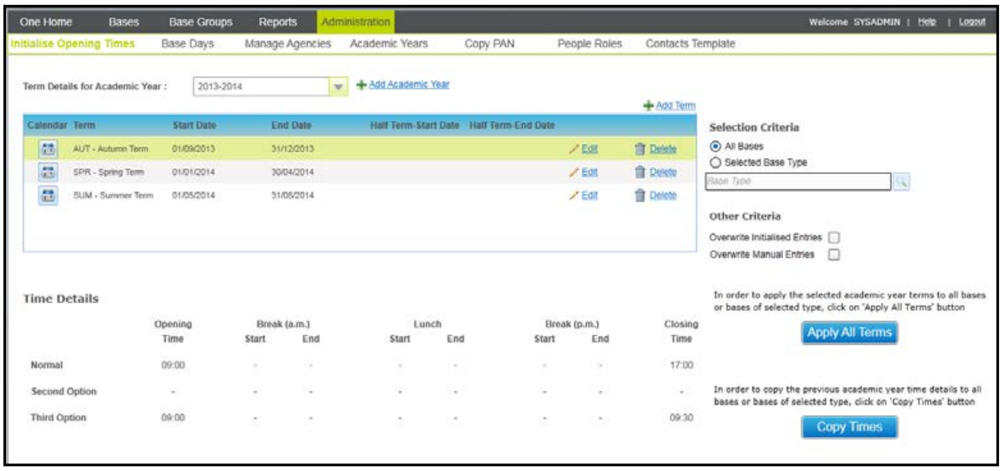


5. Click on the user group link to display a list of users displaying **User Name** and **Description**.

05 | Bases Administration

Introduction

The Administration area is used to set up options that apply across the Bases v4 module.



The following pages are accessed from the **Administration** area:

- **Initialise Opening Times**
- **Base Days**
- **Manage Agencies**
- **Academic Years**
- **Copy PAN**
- **People Roles**
- **Contacts Template.**

Permissions for Administration

To view the **Administration** area, a user group must have **Read** access for the **Administration** business process under the **Base Administration** main business process.

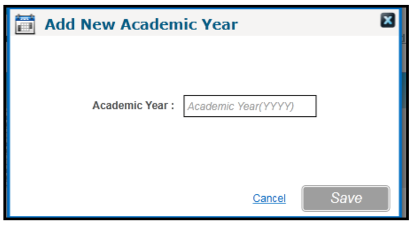
Additional permissions are required to view and update the individual administration pages. For more information, see Base Administration on page *64*.

Initialise Opening Times

The **Initialise Opening Times** page enables you to assign term dates and opening times to bases for a specific academic year.

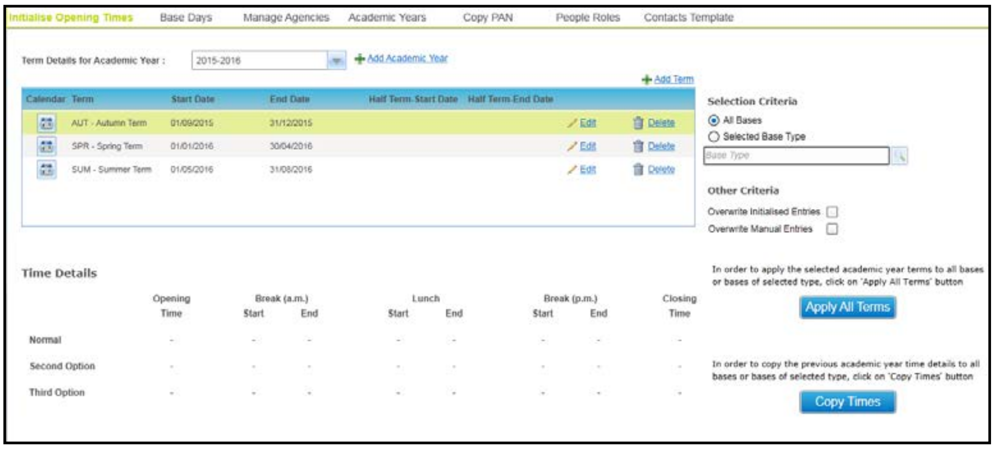
Adding an Academic Year

1. Select the **Administration** area.
2. Ensure that the **Initialise Opening Times** page is selected.
3. Click the **Add Academic Year** link to display the **Add New Academic Year** dialog.



4. Enter the starting year of the new **Academic Year**.
5. Click the **Save** button.

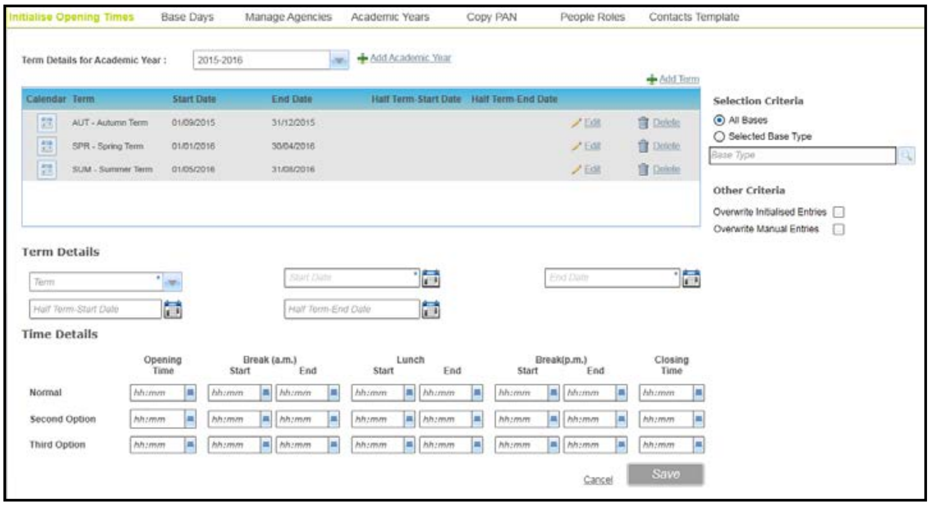
   The **Academic Year**, e.g. 2015/2016 is created and three standard terms are created for the academic year.



Adding a New Term

When an academic year is set up, the standard three terms are created automatically. If more terms are required, these are defined in the v4 Client via **Tools | Administration | Lookups** (*Table ID: 0559*) and can then be selected on the **Initialise Opening Times** page.

1. Select the **Administration** area.
2. Ensure that the **Initialise Opening Times** page is selected.
3. Click the **Add Term** link to display **Term Details** in add mode.



4. Select **Term Type** from the drop-down list (*Table ID: 0559*).
5. Enter a **Start Date** and **End Date**.

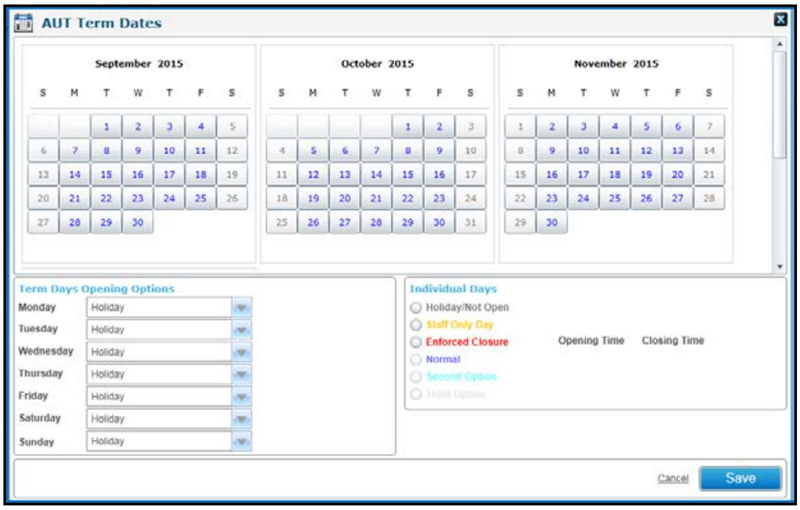
> ***NOTE:*** *Term dates cannot overlap. If the number of terms is changed, the* ***Start Date*** *and* ***End Date*** *must be adjusted appropriately.*

6. If required, enter a **Half Term Start Date** and **Half Term End Date**.
7. If required, enter **Time Details**.
8. Click the **Save** button.

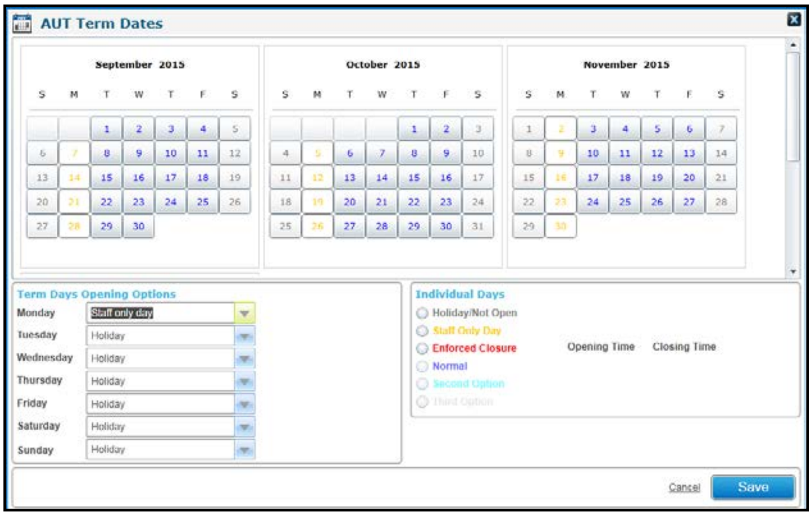
Updating Term Dates

Opening options for the term can be set using the **Term Dates** dialog.

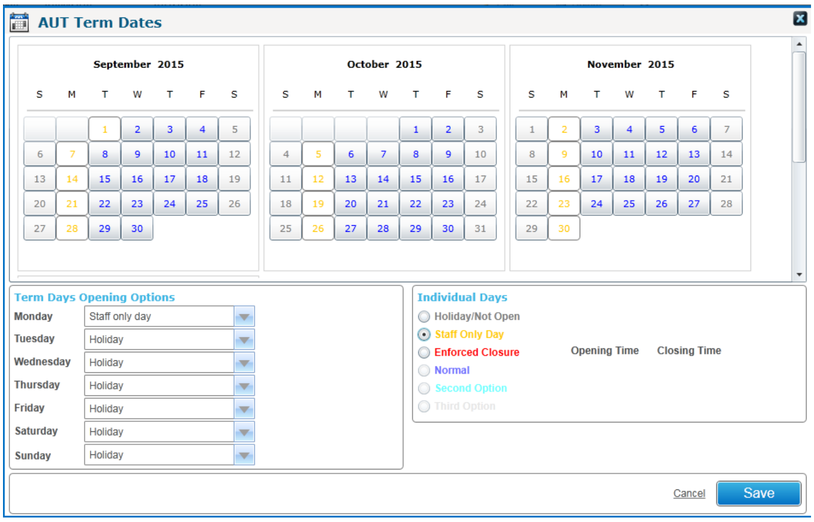
1. Select the **Administration** area.
2. Ensure that the **Initialise Opening Times** page is selected.
3. Click the calendar button adjacent to the required term to display the **Term Dates** window.



4. If required, select a **Term Days Opening Option** from the drop-down list adjacent to the required day as shown in the following graphic:



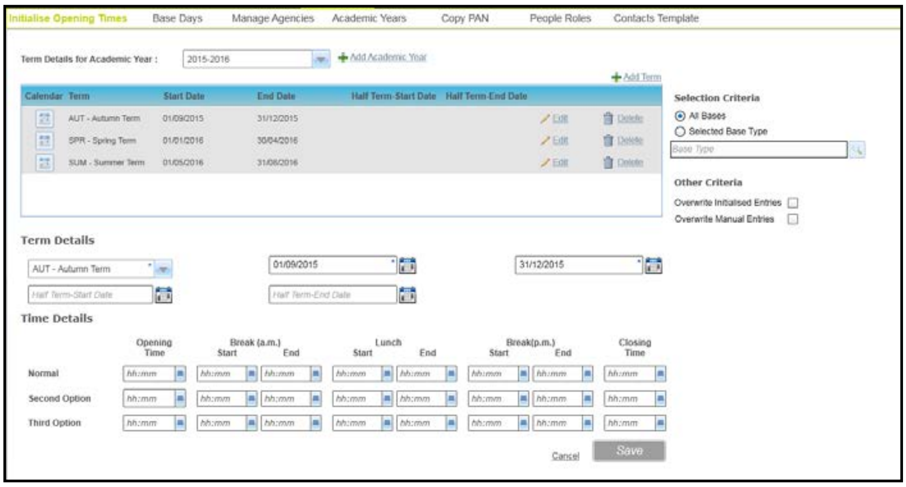
5. If required, select an individual day in the calendar and select the required **Individual Days** radio button as shown in the following graphic:



6. Click the **Save** button.

Editing Term Details

1. Select the **Administration** area.
2. Ensure that the **Initialise Opening Times** page is selected.
3. For the term you want to edit, click the **Edit** link in the term details list to display the **Term Details** in edit mode.

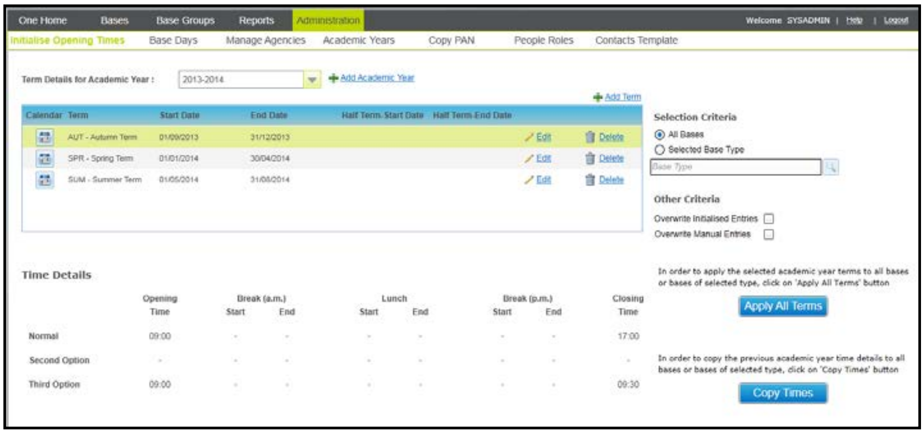


4. Enter a **Start Date** and **End Date**.

> ***NOTE:*** *Term dates must not overlap. If the number of terms is changed, the* ***Start Date*** *and* ***End Date*** *must be adjusted appropriately.*

5. If required, enter a **Half Term Start Date** and **Half Term End Date**.
6. If required, enter **Time Details**.
7. Click the **Save** button.

Applying Opening Times to Bases



The opening times can be applied to either all bases or to bases with a particular base type. Time details can be copied from the previous academic year.

> ***NOTE:*** *If this routine has been run before, this process will* <u>*only*</u> *update bases that have already been initialised or manually defined, if the* ***Other Criteria*** *check boxes are selected as follows:*
>
> ***Overwrite Initialised Entries****: select this check box to overwrite any base opening times already applied by this process and, at the same time, apply the dates to bases that do not have opening times. It will* <u>*not*</u> *overwrite manually entered opening times.*
>
> ***Overwrite Manual Entries:*** *running the routine with both boxes selected will overwrite* <u>*all*</u> *base opening times regardless of the original method of entry.*

1. Select the **Administration** area.
2. Ensure that the **Initialise Opening Times** page is selected.
3. If required, select a different **Academic Year** from the drop-down.
4. Alternatively, add a new academic year. For more information, see Adding an Academic Year on page *45*.
5. If required, edit the term details. For more information, see Editing Term Details on page *48*.
6. If required, update term dates. For more information, see Updating Term Dates on page *47*.
7. If required, select the **Selected Base Type** radio button and select a **Base Type** from the browse.
8. If required, select the **Overwrite Initialised Entries** check box.
9. If required, select the **Overwrite Manual Entries** check box.
10. Click the **Apply All Terms** button.

    When the Apply All Terms routine is finished, the total number of bases processed is displayed.
11. If required, to copy the time details from the previous academic year:
    a. Click the **Copy Times** button.

       A confirmation message is displayed.
    b. Click the **Yes** button to copy the times to all terms with the same term type in the new academic year. This process will overwrite any times manually entered.

Deleting a Term

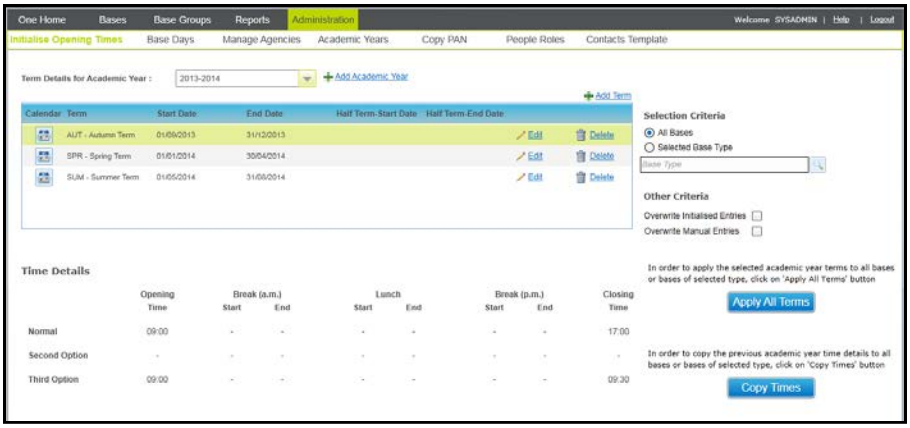
To delete a term:

1. Select the **Administration** area.
2. Ensure that the **Initialise Opening Times** page is selected.
3. For the term you want to delete, click the **Delete** link in the term details list.

   A confirmation message is displayed.
4. Click the **Yes** button to confirm.

Displaying Opening Times

1. Select the **Administration** area.
2. Ensure that the **Initialise Opening Times** page is selected.
3. If required, select a different **Academic Year** from the drop-down.



Base Days

The **Base Days** page enables reporting on any aspects relating to the base days calendar e.g. Opening Days.

For example, to create a report showing the cost of free school meals you need to know how many open days there are within a claim period.

Base Days enables you to replace the use of the BASE_RAWCAL view with a new BASE_RAWCAL table to enable the information in the data string to be manipulated. The table stores one row per day per term per base.

> ***NOTES:*** *The BASE_RAWCAL table stores base times for a given period. Data outside the term time is not included in the table.*
>
> *This process may create a large table and the capacity of the server will dictate whether this option may be considered. The process may take several hours to complete, depending upon the volume of records on the database.*

Populating the Base Days Table

NOTE: *When the populate process is initiated, the contents of the existing table will be deleted and the table will be repopulated with data appropriate to the date range entered.*

To populate the new table:

1. Select the **Administration** area.
2. Ensure that the **Base Days** page is selected.
3. Enter the **Earliest Term Start** and **Latest Term End** dates to specify which terms should be included in the initial population.
4. Click the **Populate** button.

   The following warning message is displayed:

   All Records in Base_rawcal Table will be Deleted. Are you sure you want to continue?
5. Click the **OK** button to continue the populate process.

   The following message is displayed while the populate process is in progress:

   Base Days Population is in Progress
6. When the Base Days Population routine is finished, the following message is displayed:

   Last Run was Successful on dd/mm/yyyy

Deleting the Base Days Information

To delete the contents of the existing table:

1. Select the **Administration** area.
2. Ensure that the **Base Days** page is selected.
3. Click the **Delete** button.

   The following confirmation message is displayed:

   All Records in Base_rawcal Table will be Deleted. Are you sure you want to continue?
4. Click the **Yes** button to delete the records. The following message is displayed:

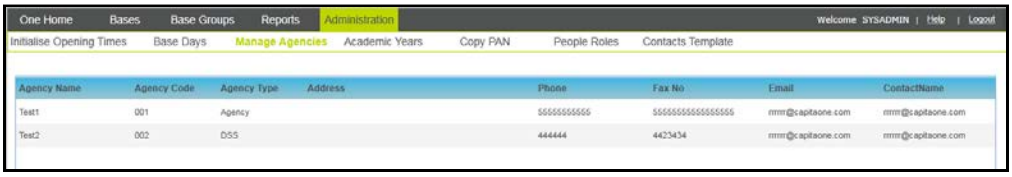
   Base Days information deleted successfully.

Managing Agencies

The **Manage Agencies** page displays details of organisations defined as agencies in One v4 Online.

1. Select the **Administration** area.
2. Select the **Manage Agencies** page to display the following details:

- **Agency Name**
- **Agency Code**
- **Agency Type**
- **Address**
- **Phone**
- **Fax No**
- **Email**
- **Contact Name.**



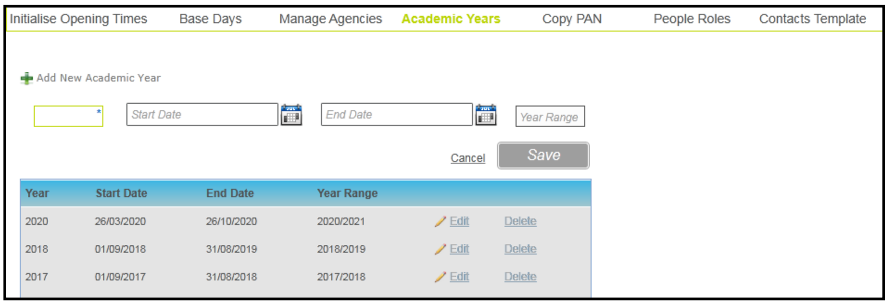
Managing Academic Years

The **Academic Years** page enables you to define academic years for Published Admissions Numbers (PAN). The academic years must be set up before the school PAN details can be entered.

The page lists all the available academic years with **Year**, **Start Date**, **End Date** and **Year Range.**

Adding a New Academic Year

1. Select the **Administration** area.
2. Select the **Academic Years** page.
3. Click the **Add New Academic Year** link.



4. Enter a **Year**.
5. **Start Date**, **End Date** and **Year Range** are automatically completed.
6. If required, select a different **Start Date**.

7. If required, select a different **End Date**.
8. Click the **Save** button.

Copy PAN

The **Copy PAN** page enables the Local Authority to copy the Published Admission Number (PAN) data for its bases from one academic year to the next.

> ***NOTE:*** *Other modules share this functionality. A warning message is displayed on the page to alert users to the repercussions of any changes to the PAN data.*

Copying PAN Data

1. Select the **Administration** area.
2. Select the **Copy PAN** page.

The **Current Academic Year** is selected automatically.

3. If required, select the **Previous Academic Year** or **Next Academic Year** from the drop-down.

   The academic year to which you are copying the data will automatically show the following year.
4. If required, select the **Overwrite any existing PAN data** check box to overwrite existing PAN data in the academic year you are copying to.
5. If required, select the **Overwrite any existing Banding data** check box to overwrite existing banding data in the academic year you are copying to.
6. Click the **Process** button. A confirmation message is displayed.
7. Click the **Yes** button to complete the copy PAN process.

   Upon completing the copy PAN process, if some bases were skipped, a warning message similar to the following is displayed:

   N bases processed successfully, but N bases were skipped.

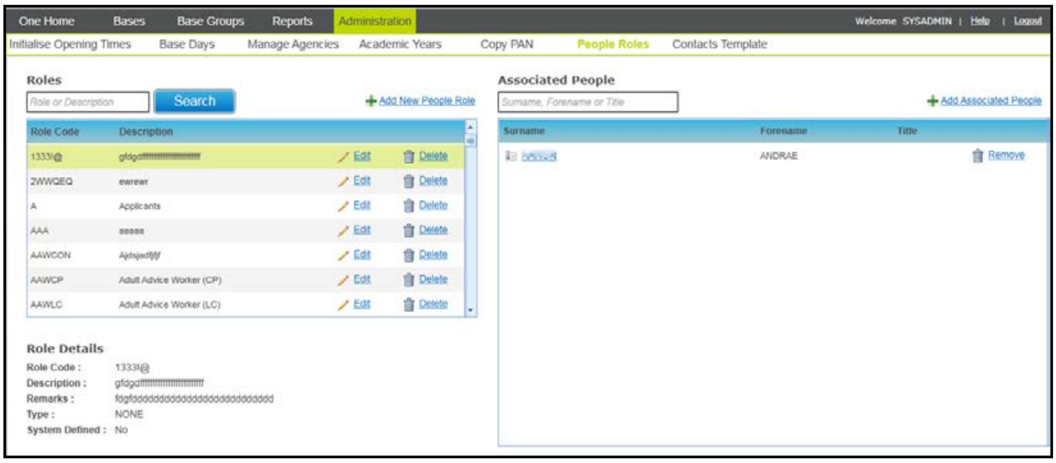
   If no bases were skipped, a success message is displayed.

People Roles

One includes a default set of roles. These roles are system defined and cannot be deleted.

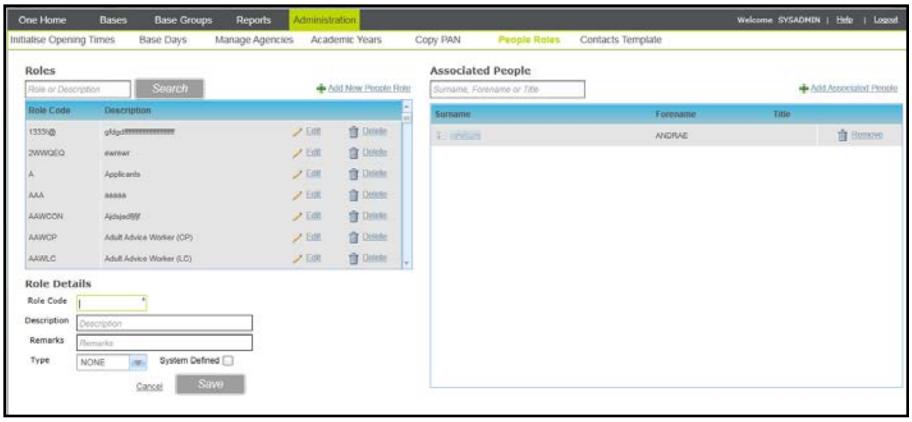
The **People Roles** page is used with the **Base Contacts** tab, enabling you to define additional roles for Local Authority and school contacts.

This page provides the functionality to add associated people to each role and to add new roles to the list.



Adding a New Role

1. Select the **Administration** area.
2. Select the **People Roles** tab.
3. Click the **Add New People Role** link.

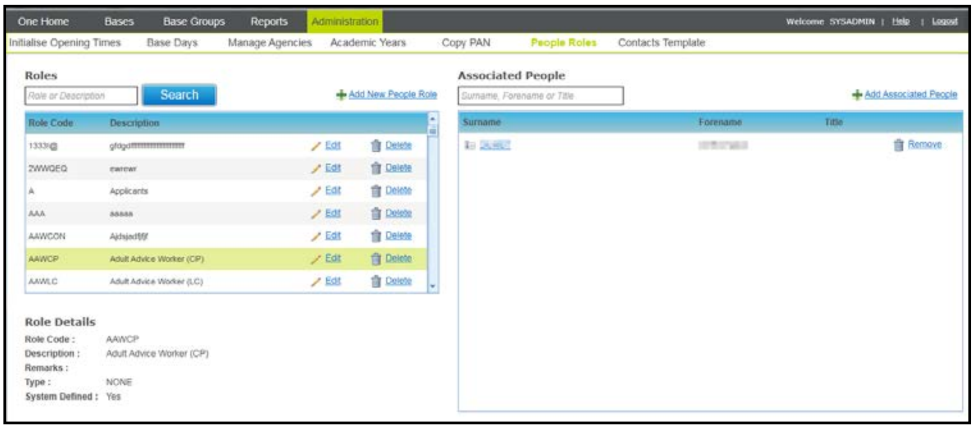


4. Enter a **Role Code**.
5. If required, enter a **Description** and **Remarks**.
6. Select a **Type** from the drop-down.
7. If required, select the **System Defined** check box. If a role is system defined, it cannot be deleted.
8. Click the **Save** button.

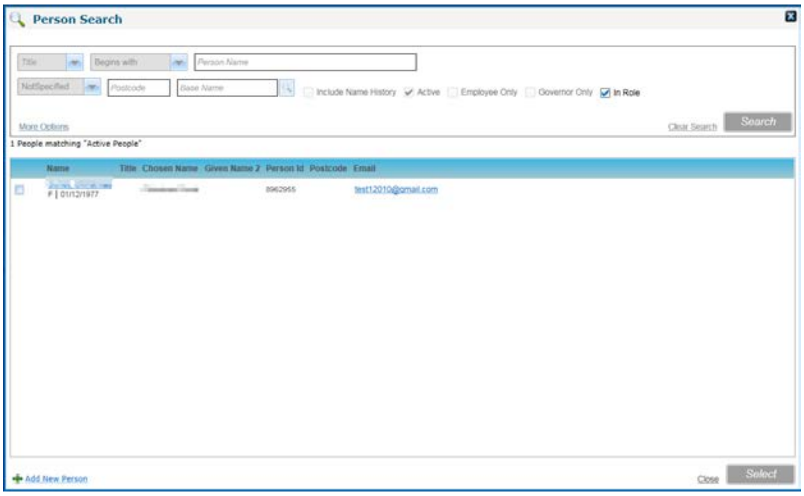
Associating New People with Roles

To associate a new person with a role:

1. Select the **Administration** area.
2. Select the **People Roles** tab.
3. To search for a role:
   a. Enter full or partial **Role** or **Description**.
   b. Click the **Search** button.
4. Select the required role in the list of **Roles**.



5. Click the **Add Associated People** link to display the **Person Search** dialog.



The **In Role** check box is selected and people currently associated with the role are listed.

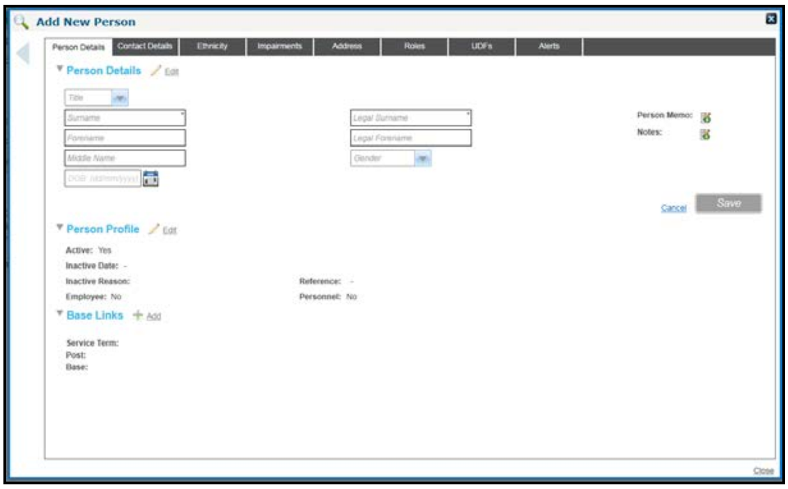
6. Deselect the **In Role** check box to list people not associated with the role.
7. If the required person is not listed, you can add them. For more information, see [Adding a New Person to Associate with a Role](#) on page *55*.
8. If required, enter search criteria and click the **Search** button.
9. Select the check box adjacent to the required person.
10. Click the **Select** button.

Adding a New Person to Associate with a Role

When selecting a person to associate with a role, if the required person is not listed, they can be added.

> ***NOTE:*** *When a new role is created via the* ***People Roles*** *tab, it must be added to the appropriate contacts role code lookup via the* ***Contacts Template*** *tab to make it available for selection.*

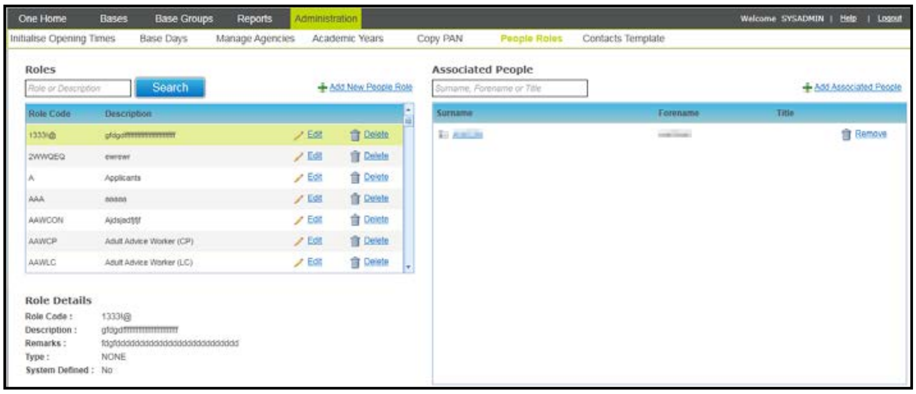
1. Select the **Administration** area.
2. Select the **People Roles** tab.
3. Click the **Add Associated People** link to display the **Person Search** dialog.
4. Click the **Add New Person** link to display the **Add New Person** dialog.



5. Enter the **Person Details** and any other details.
6. Click the **Save** button.

Displaying Roles and Associated People

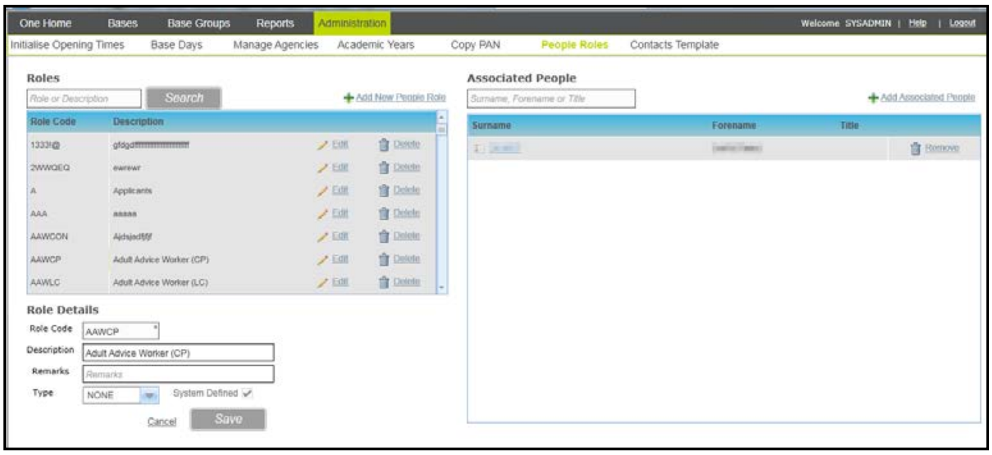
1. Select the **Administration** area.
2. Select the **People Roles** tab.



3. If required, enter a **Role** or **Description** and click the **Search** button.
4. Highlight the required role to display the **Associated People**.

Editing Role Details

1. Display a list of required roles and associated people. For more information, see [Displaying Roles and Associated People](#) on page *56*.
2. Click the **Edit** button adjacent to the required role to display the **Role Details** in edit mode.



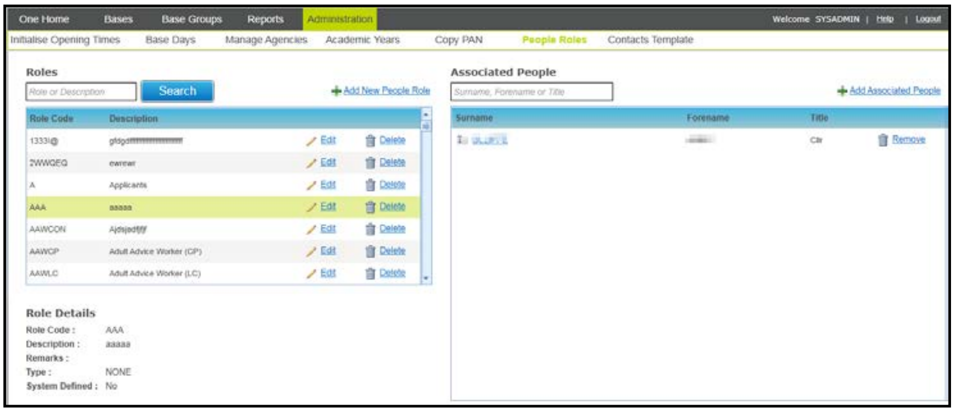
3. If required, update the details:
   a. Enter a **Description**.
   b. Enter **Remarks**.
   c. Select a **Type** from the drop-down.
   d. Select or deselect the **System Defined** check box.

NOTE: *A role's* ***Type*** *cannot be changed if the role is used in the contacts template.*

4. Click the **Save** button.

Removing a Person from a Role

1. Display a list of required roles and highlight a role to display the **Associated People**. For more information, see Displaying Roles and Associated People on page *56*.



2. Click the **Remove** button adjacent to the required person. A confirmation message is displayed.
3. Click the **OK** button to confirm.

Deleting a Role

1. Display a list of required roles and associated people. For more information, see Displaying Roles and Associated People on page *56*.
2. Click the **Delete** button adjacent to the required role to display a confirmation message.
3. Click the **OK** button to confirm the deletion.

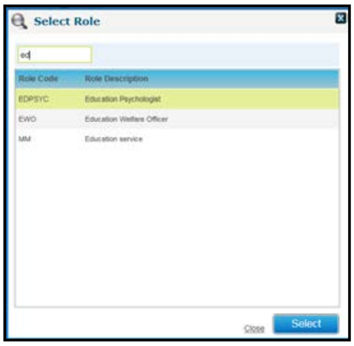
Contacts Template

The **Contacts Template** page is used to define the contact roles that are available to select for a base and the default order in which they are listed on the **Base Contacts** tab. For information about base contacts, see [Adding a Base Contact](#) on page *8*.

Adding a Contact Role

A role can be added to the contacts template for either the Local Authority or schools.

1. Select the **Administration** area.
2. Select the **Contacts Templates** tab.
3. Select the **Local Authority** or **School** radio button.
4. Click the **Add Contact Role** link to display the **Select Role** dialog.
5. To search for a role, enter one or more characters in the search box.



6. Highlight the required role.
7. Click the **Select** button to display a confirmation message.
8. Click the **Yes** button to confirm.

The role is added to the end of the list and can be promoted if required. For more information, see [Promoting or Demoting Contact Roles](#) on page *58*.

Promoting or Demoting Contact Roles

Promoting or demoting contact roles determines the order in which they are displayed on the **Base Contacts** tab.

1. Display the contacts template for the Local Authority or schools. For more information, see [Displaying a Contacts Template](#) on page *59*.

2. To promote a role:
   a. Highlight the required role.
   b. Click the **Promote** button.

   To demote a role:
   a. Highlight the required role.
   b. Click the **Demote** button.

Displaying a Contacts Template

To display the contacts template for the Local Authority or schools:

1. Select the **Administration** area.
2. Select the **Contacts Template** tab to display Local Authority contacts.

3. To display school contacts, select the **School** radio button.

Deleting a Contact Role

To remove a role from the contacts template:

1. Display the contacts template for the Local Authority or schools. For more information, see Displaying a Contacts Template on page *59*.
2. Click the **Delete** button adjacent to the required role to display a confirmation message.
3. Click the **OK** button to confirm the deletion.

06 | Setting up Permissions

Introduction

Permissions are set up in the v4 Client via **Tools | Permissions | User Group Processes**. For more information, see Granting Permissions to Access Bases on page *3*.

Bases v4 is only accessible if your Local Authority has set up Read permission to the Bases business process.

All Bases Area

In order to access the functionality in the **Bases | All Bases** area a user group must have permissions set up as shown in the following table:

Functionality	Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete
Add a new base	Base Administration	Bases		✓	
Read base summary	Bases	Base Summary Information	✓		
Edit base details	Base Administration	Bases		✓	
View opening times	Bases	Opening Times	✓		
Edit opening times	Base Administration	Bases		✓	
Copy times	Bases	Opening Times		✓	
View sites	Bases	Sites	✓		
Add/Edit sites	Bases	Sites		✓	
View gates	Bases	Gates	✓		
Add/Edit gates	Bases	Gates		✓	
Delete gate	Bases	Gates			✓
View PAN tab	Bases	PAN	✓		
View PAN information	Base Administration	Academic Years	✓		
	Admissions Set Up and Population	PAN (including Banding) and Vacancies	✓		

Functionality	Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete
Edit PAN information	Base Administration	Academic Years	✓		
	Admissions Set Up and Population	PAN (including Banding) and Vacancies		✓	
View Areas	Bases	Areas	✓		
Edit Areas	Bases	Areas		✓	
View Ofsted & Awards	Bases	Ofsted And Awards	✓		
Add/Edit Ofsted & Awards	Bases	Ofsted And Awards		✓	
Delete Ofsted & Awards	Bases	Ofsted And Awards			✓
View Base History & Classifications	Bases	Base History & Classification	✓		
Edit Classifications	Bases	Base History & Classification		✓	
View Student Numbers	Bases	Student Tab	✓		
Edit Student Numbers	Bases	Student Tab		✓	
Viewing Trigger Alerts	Bases	Base Summary Information	✓		
View/Add/Edit Risk Alerts	Bases Administration	Bases		✓	
	Administration	Alerts Processing		✓	
Delete Risk Alert	Bases Administration	Bases		✓	
	Administration	Alerts Processing			✓

All Bases on Map

The **All Bases on Map** functionality is only available if the LA has set up Read permission to the **All Bases on Map** business process under Main Business Process: **Bases**.

The **View Map** link is accessed via **Bases | All Bases on Map** and can be used to see a graphical representation of the base, principal site, principal site gates, other sites and other site's gates.

> ***NOTE:*** *The **View Map** link is subject to permissions and also subject to GIS Licensing. It is disabled if a GIS license is not installed.*
>
> *For more information, see* *Viewing Bases on Map on page 31.*

In order to access the functionality in the **Bases | All Bases on Map** area a user group must have permissions set up as shown in the following table:

Functionality	Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete
View map	Admission Applications	Admissions GIS Map	✓		
Reposition/position map objects	Admission Applications	Admissions GIS Map		✓	
	Bases	Gates		✓	
	Bases	Sites		✓	
Import catchments	Admissions Setup and Population	Update Catchments			✓

Base Groups

The permission required for viewing the **All Base Groups** page is **Read** for Business Process: **Base Groups** under Main Business Process: **Base Groups Administration**.

In order to access the functionality in the **Base Groups | All Base Groups** area a user group must have permissions set up as shown in the following table:

Functionality	Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete
Add a base group	Base Groups Administration	Base Groups		✓	
Select a report to populate a base group	Base Groups Administration	Report Chooser		✓	
Populate a base group (manual and via report)	Base Groups Administration	Populate		✓	
Remove base from base group	Base Groups Administration	Remove		✓	
Delete a base group	Base Groups Administration	Base Groups			✓

Reports

To administer reports or access report folders, a user group must have full permission to the **Quick Report (Allow)**, **Report Management**, **Report Permissions** and **Report Processing** business processes within the **Administration** Main Business Process as shown in the following table:

Functionality	Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete
Reports	Administration	Quick Report (Allow)			✓
		Report Management			✓
		Report Permissions			✓
		Report Processing			✓

Base Administration

In order to access the functionality in the **Administration** area a user group must have permissions set up as shown in the following table:

Functionality	Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete
Initialise opening times	Base Administration	Initialise Opening Times	✓		
Add academic year	Base Administration	Initialise Opening Times		✓	
	Base Administration	Academic Years		✓	
Add/Edit term details	Base Administration	Initialise Opening Times		✓	
Delete a term	Base Administration	Initialise Opening Times			✓
View base days	Base Administration	Base Days	✓		
Populate base days	Base Administration	Base Days		✓	
Delete base days	Base Administration	Base Days			✓
View agencies	Base Administration	Manage Agencies	✓		

Functionality	Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete
View academic year	Base Administration	Academic Years	✔		
Edit academic year	Base Administration	Academic Years		✔	
Copy PAN data	Admissions Setup and Population	Base Admin for Admissions		✔	
View people roles	Base Administration	People Roles	✔		
Add/edit a role or associate people	Base Administration	People Roles		✔	
Select Local Authority radio button	Base Administration	LA Contact	✔		
Select School radio button	Base Administration	School Contact	✔		
Add LA contact role	Base Administration	LA Contact		✔	
Add school contact role	Base Administration	School Contact		✔	
Delete LA contact role	Base Administration	LA Contact			✔
Delete school contact role	Base Administration	School Contact			✔

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