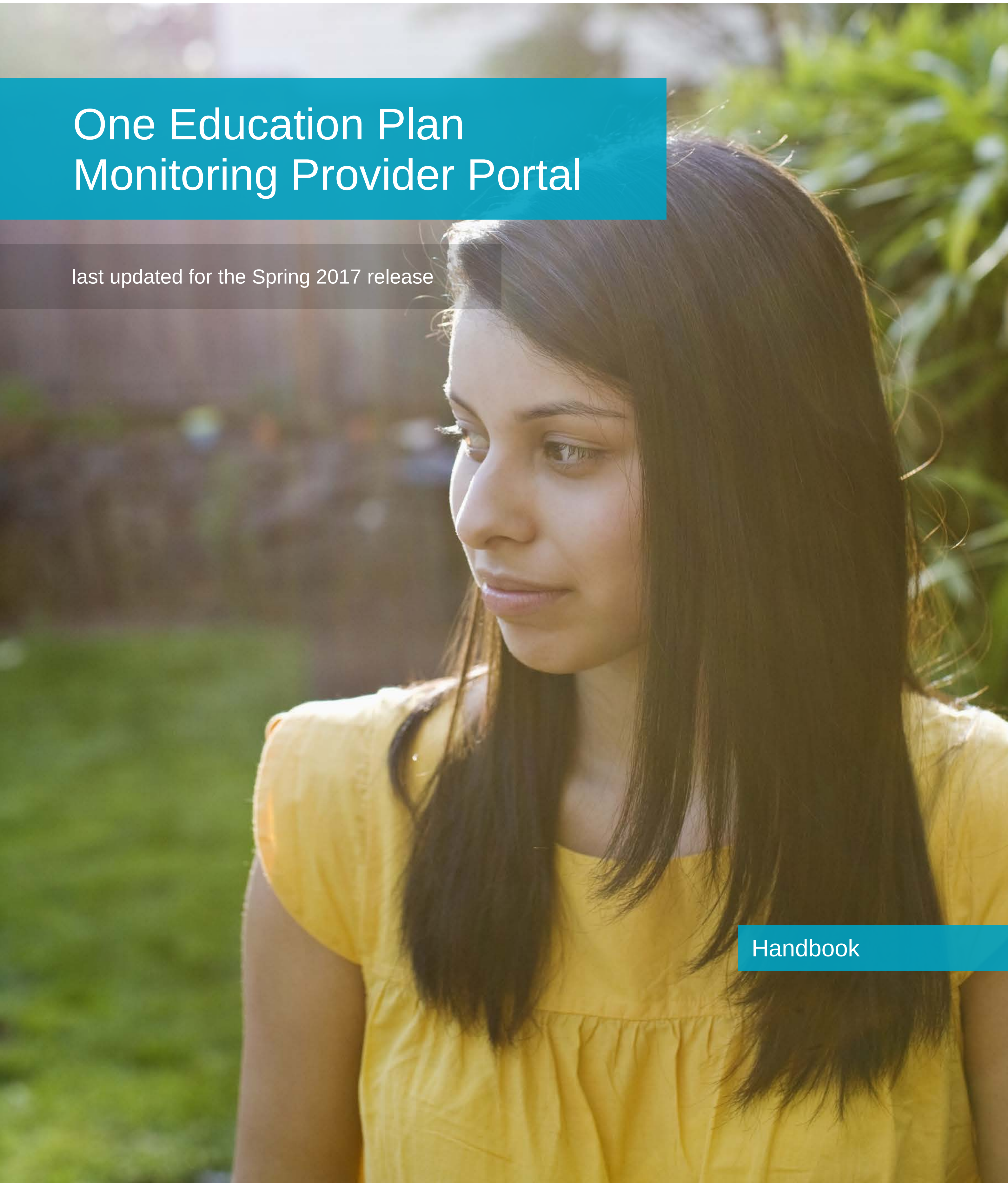
CAPITA

oneeducation

One Education Plan Monitoring Provider Portal

last updated for the Spring 2017 release



Handbook

Revision History

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One Education Plan Monitoring Provider Portal Handbook/Spring 2017/2017-04-25

www.capita-one.co.uk

Contacting the Service Desk

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

Providing Feedback on Documentation

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

onepublications@capita.co.uk

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

Contents

01 | Overview

Introduction

Education Plan Monitoring (EPM) enables local authorities to manage business units, school support visits, plans and associated costs.

Using EPM Provider Portal

EPM Provider portal includes the following features:

Business Units

A business unit can be marked as a traded service and it is possible to record an email address and phone number for the business unit. For more information, see Administering Business Units on page *22*.

Service Level Agreement/Base Association

SLAs for EPM are maintained in the v4 rich Client and can be associated to one or multiple bases within the portal. The School Support Visit record can be linked to the SLA for the visit cost calculations. For more information, see Administering Service Level Agreements on page *93* and Adding Costs for School Support on page *68*.

Additional Questions and Answers

In EPM Provider portal, Questions and Answers perform the same function as UDFs in v3. This functionality is available in the Plan, School Support Visits, and School Support Costs areas of the EPM portal.

NOTE: *UDFs in v3 will not be visible in the portal and will not be translated to additional questions.*

For more information, see Setting Up Additional Questions on page *51*.

Base Finance Reference Code

This feature enables the capture of a reference number for an external system, so that invoice details can be exported and matched to the correct base in an external financial system.

Within the EPM Provider portal, users can store a reference number against a base and change it, delete it, view it as necessary. The number is used for reporting purposes and can be exported with other base and invoice related data. For more information, see Managing External References on page *99*.

Making a Business Unit Inactive

A business unit can be made inactive if not in use and no longer required. It can be made active again in the future, if required. For more information, see Updating Business Unit Details on page *25*.

Making a Fee Code Inactive

A fee code can be made inactive in the EPM administration area so that it is no longer displayed in the school support area. For more information, see Editing a Fee Code on page *46*.

Parameter Driven Reporting

The Provider portal enables you to define parameters for EPM to generate a standard set of reports. The parameters are Base, School Support Staff, Activity, Business Units and Dates.

A set of standard Crystal reports provides templates to help report designers.

For more information, see Managing Reports on page *85*.

Enhanced Calendar

A calendar control in the Provider portal enables school support visits to be displayed based on the dates for which they are recorded. The calendar control is an intuitive tool, giving the daily, weekly, monthly and yearly view. For more information, see Managing the Diary for School Support on page *63*.

ACL Security

The person and school support staff searches in Provider portal respect Access Control Level security.

One v4 Client

The following functionality in One v4 Client enables EPM to be used in the Provider portal. For more information, see Setting Up in v4 Client on page *11* .

Standard Lookups

The EPM module standard lookups are available in EPM Provider portal and should be maintained in the v4 Client via **Tools | Administration | Lookups**.

Defining EPM SLAs

EPM Service Level Agreements (SLAs) are maintained in the v4 Client. The SLA cost can be stored either as a value or a percentage and, depending upon the requirement, it can be used to calculate school support cost. For more information, see and Administering Service Level Agreements on page *93* and Adding Costs for School Support on page *68*.

Financial Year

New financial years must be set up in the v4 Client. For more information, see Setting Up a New Financial Year on page *17*.

To maintain historic financial years defined in v3, an enabling script must be run to bring the data from v3 to v4.

More Information:

For more information, refer to the *Technical Guide: Deploying and Configuring EPM for Local Authorities* on the One Publications website (www.onepublications.com).

Define EPM Roles

Roles are specific to the EPM module.

NOTE: *Only people associated with roles (either system or EPM) can be accessed via the portal. For more information, see Assigning a Person to an EPM Role on page* 15.

Mapping a User

A user of EPM Provider portal should be mapped to either a person or a base in the v4 Client. Visitors should be mapped to a person and a base user should be mapped to a base. For more information, see Mapping a User to a Person on page *14* and Mapping a User to a Base on page *15*.

Auditing

Auditing for the EPM tables is done to the v4 Audit log.

Migration

For local authorities using EPM in v3, there is no formal migration. All functionality is delivered via the Provider portal.

Scripts are provided to migrate the following historical information:

- Financial Years
- Memos.

To obtain these scripts, please contact the One Service Desk via My Account.

More Information:

For information about configuring EPM, refer to the *Technical Guide: Deploying and Configuring EPM for Local Authorities* is available on My Account and on the One Publications website (www.onepublications.com).

NOTES: *The target group lookup code is not included in the EPM portal. Any historic **Target** groups attached to the v3 school support record are displayed in read-only format. Amendments can only be made via database scripts and these scripts are not provided as part of the portal delivery.*
*Time recorded under **Other Items** in v3 school support is not displayed in the EPM portal.*
***Teaching Quality** is not included in the EPM portal. If you deselect a focus code that has a v3 teaching quality record attached, the association between the teaching quality and the focus code is removed and it will not be displayed on the v3 **Teaching Quality** screen.*

What's New in this Release

Two step verification has been added to the Provider portal to increase user security. For more information, see Setting Up Two Step Verification on page *9*.

Using this Handbook

This handbook is intended for users and administrators of EPM in the Provider portal.

The first chapter of the handbook provides an overview of the new features included in EPM Provider portal.

The second chapter covers setting up and configuring the Provider portal.

The third chapter covers managing users in the Provider portal.

The fourth chapter covers setting up in the v4 Client.

The remainder of the handbook describes using EPM Provider portal to manage:

- Business units and user codes
- School support bookings
- Plans

- Reporting
- Invoicing
- Service Level Agreements
- Evaluation.

02 | Setting Up and Configuring the Provider Portal

Introduction

System administrators can define message templates, customise the text that is displayed on the website, upload a site logo and manage configuration of the website.

More Information:

For information about configuring EPM, refer to the *Deploying and Configuring EPM for Local Authorities* technical guide available on My Account and on the One Publications website (www.onepublications.com).

Setting the Language in Chrome

If the Provider portal is accessed using Google Chrome, the language must be set to English (United Kingdom).

English (United Kingdom) must be the first language in the list.

For more information regarding setting the language in Google Chrome, refer to: https://support.google.com/chrome/answer/95416?hl=en-GB

Common Functionality

The following functionality is common for all processes in the Provider portal.

Function	Description
Tooltips	Using the mouse, hover over an item on the screen to display a description of the information displayed or the action required.
Home button	Click the **Home** button to display the **Home** page
Change Password	Click the drop-down adjacent to the user name and select **Change Password.** Enter your **Current password**, **New password** and **Confirm new password**. Click the **Change password** button**.**
Change Secret Question	Click the drop-down adjacent to the user name and select **Change Secret Question.** Enter your **Current Password**, Select a **New Secret Question** and enter a **Secret Answer**. Click the **Save** button. **NOTE:** This functionality is only available if second factor authentication is enabled.
Sign out	Click the **Sign Out** button adjacent to the user name.

03 | Managing Users in Provider Portal

Introduction

NOTE: *Users are created and user permissions are set up in the v4 Client. For more information, see* *Setting Up User Accounts and Permissions* *on page 11.*

Creating a Portal User Account

To create a new portal user account, the One System Administrator must:

1. Set up the user in the One v4 Client and assign to them to the relevant user group via **Tools | Administration | User Management | User Accounts**.
2. Send the log in details (user name and initial password) to the new user via email.

For more information, see Setting Up User Accounts and Permissions on page *11*.

Activating a Portal User Account

A new Provider portal user needs to activate their user account.

When the user first logs in with their user name and initial password, they are informed that an activation email has been sent to them and that they must click on the activation link in the email to verify their email address. The user must:

1. Click on the unique link contained in the email.
2. Enter their user name and original password.

They are prompted to change their password and, if second factor authentication is enabled, to select a secret question and supply an answer.

More Information:
For more information regarding user setup and permissions, refer to the Technical Guide: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities*, which is available on My Account and on the One Publications website.

Logging into the Portal

A user with an active user account can log into the portal.

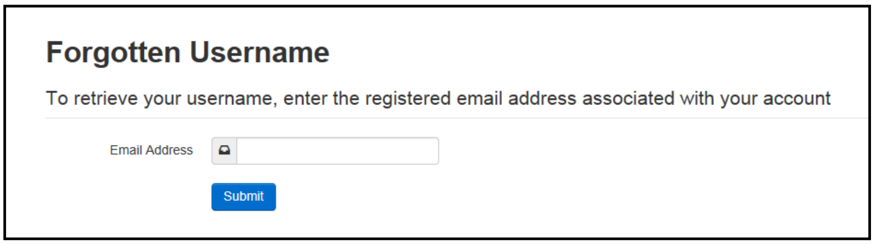
Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

NOTE: *The* ***Secret Question*** *page is only displayed if second factor authentication is enabled by the system administrator via* ***Administration | Site Setup | Configuration****.*

Retrieving Your User Name

If you forget your user name:

1. From the portal **Log In** screen, click the **Forgotten your username?** link to display the **Forgotten Username** page.

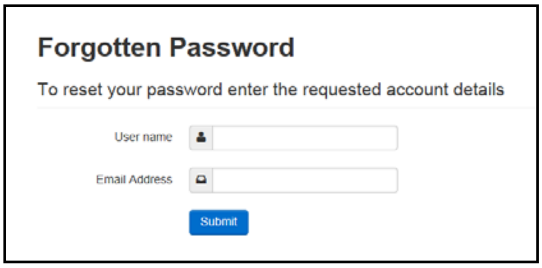


2. Enter your registered **Email Address** and click the **Submit** button.
3. Access your registered email account and open the email received to retrieve your user name.

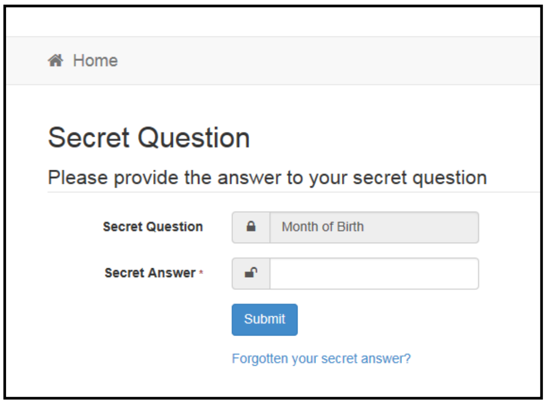
Resetting Your Portal Password

To reset your password:

1. From the portal **Log In** screen, click the **Forgotten your password?** link to display the **Forgotten Password** page.



2. Enter your **User name** and registered **Email Address** and click the **Submit** button.
3. If second factor authentication is enabled, enter the **Secret Answer** and click the **Submit** button.



4. Access your registered email account and open the email received.
5. Follow the instructions in the email to reset your password.

Resetting Your Secret Question

If you need to reset your secret question:

1. From the portal **Secret Question** screen, click the **Forgotten your secret answer?** link.

2. Enter your **User name** and registered **Email Address** and click the **Submit** button.
3. Follow the reset instructions in the email.

Setting Up Two Step Verification

Introduction

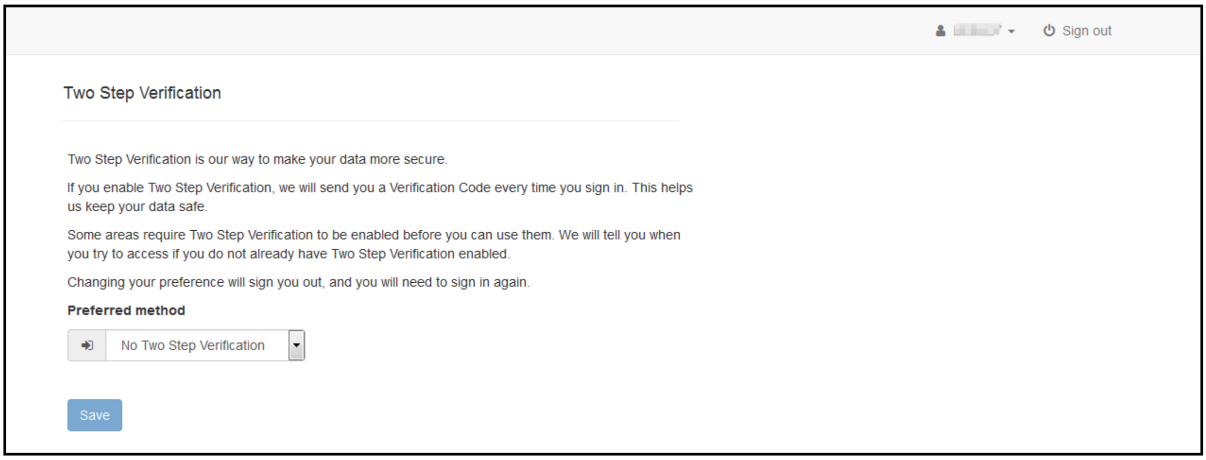
If two step verification is enabled, you will be sent a verification code every time you sign in.

If two step verification is not enabled, a message is displayed when you log into the Provider portal with a link to enable it if you want to.

Enabling Two Step Verification

To enable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.



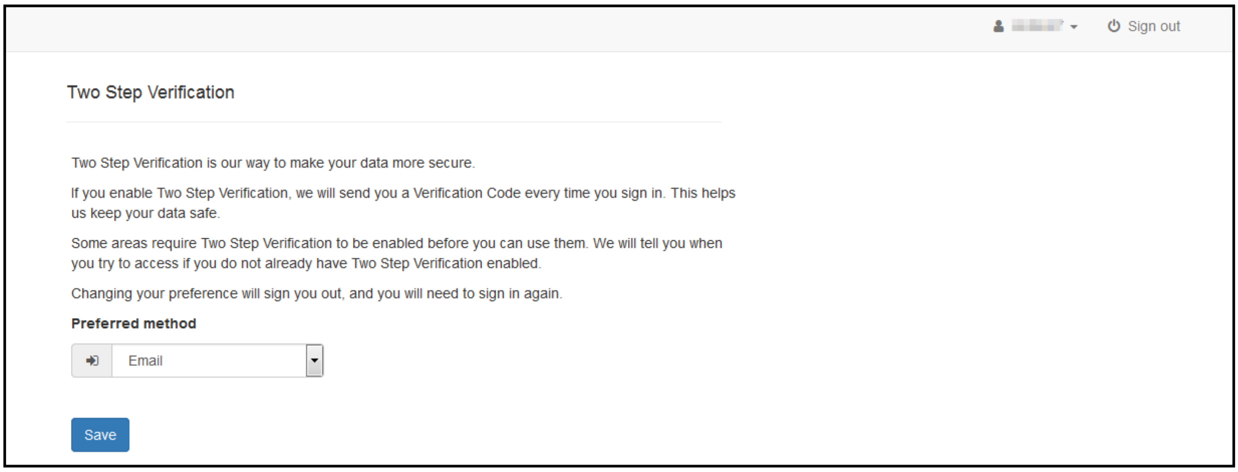
2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
3. Click the **Save** button.

   You will be signed out and will need to sign in again.

Disabling Two Step Verification

To disable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.



2. Select **No Two Step Verification** from the **Preferred method** drop-down.
3. Click the **Save** button.

   You will be signed out and will need to sign in again.

> **More Information:**
>
> For information about configuring EPM, refer to the *Deploying and Configuring EPM for Local Authorities* technical guide available on My Account and on the One Publications website (www.onepublications.com).

04 | Setting Up in v4 Client

Setting Up User Accounts and Permissions

The association of EPM permission roles to a user account in the v4 Client enables access to the EPM Provider portal. The permissions associated with the role control user access and determine the tiles displayed.

The following process should be followed:

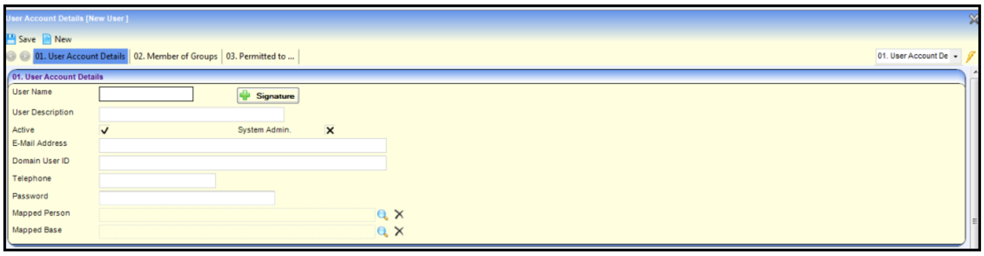
1. Create a user account. For more information, see Creating a User Account on page *11*.
2. Create a user group. For more information, see Creating a User Group on page *12*.
3. Associate the user account to the user group. For more information, see Associating a User Account with a User Group on page *12*.
4. Assign business processes to the user group. For more information, see Assigning a Business Process to a User Group on page *13*.
5. Assign access rights. For more information, see Assigning Access Rights on page *14*.

Creating a User Account

A user account must be created and mapped to either a person or a base.

1. In the v4 Client select **Tools | Administration | User Management | User Account** to display the **User Account Enquiry** page.

2. Click the **New** button to create a new user account.



3. Enter **User Account Details**. For more information on these options, refer to the *Managing Users in v4* chapter in the *One System - Users, Groups, Permissions* handbook.
4. Click the **Mapped Person** browse button to map the user to a person. For more information, see Mapping a User to a Person on page *14*
5. Alternatively, click the **Mapped Base** browse button to map the user to a base. For more information, see Mapping a User to a Base on page *15*.
6. Click the **Save** button.

Creating a User Group

1. In the v4 Client, select **Tools | Administration | User Management | User Group** to display the **User Groups Enquiry** page.

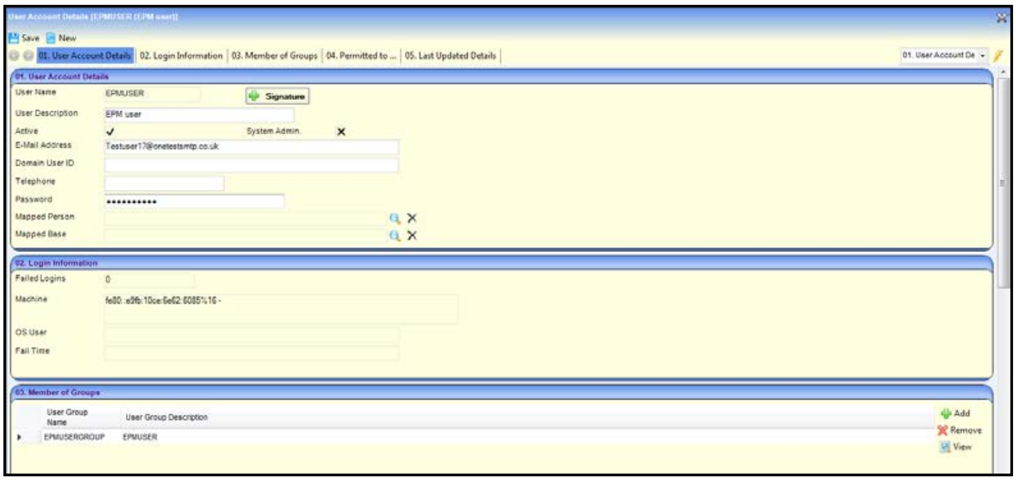
2. Click the **New** button to display the **User Group Details** page.

3. Enter **User Group Details** and click the **Save** button.

Associating a User Account with a User Group

1. In the v4 Client, select **Tools | Administration | User Management | User Account** to display the **User Account Enquiry** page.

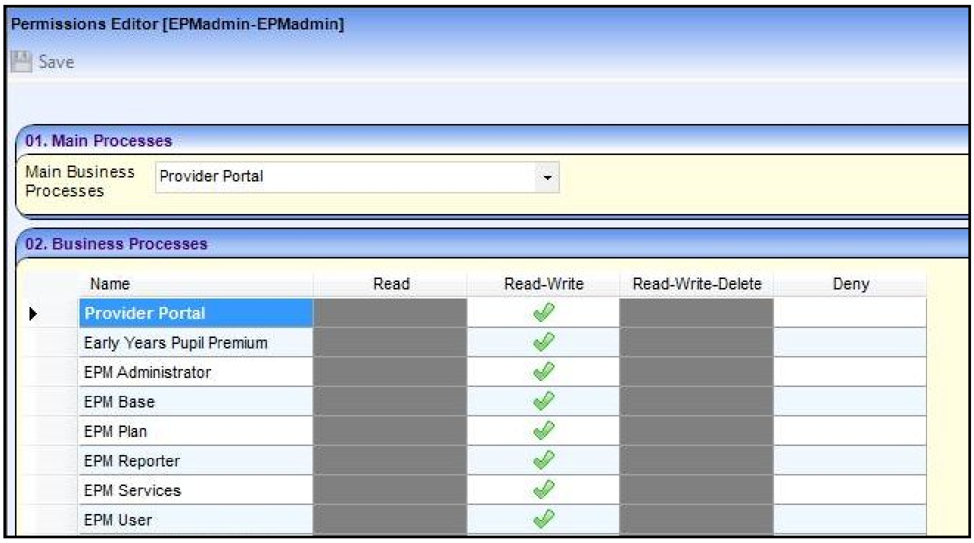
2. Enter search criteria and click the **Search** button to display a list of user accounts.
3. Select the required user account and click the **Open In New Window** button to display the **User Account Details** page.
4. Click the **Add** button on the **Member of Groups** panel and select the required group.



5. Click the **Save** button.

Assigning a Business Process to a User Group

1. In the v4 Client, select **Tools | Permissions | User Group Processes** to display the **User Group Processes Editor** page.
2. Select the required **User Group**.
3. From the **Main Business Process** drop-down list, select **Provider Portal**.



4. Select the required permissions and click the **Save** button.

Assigning Access Rights

Access rights for each area in EPM Provider portal should be assigned to user roles as shown in the following table:

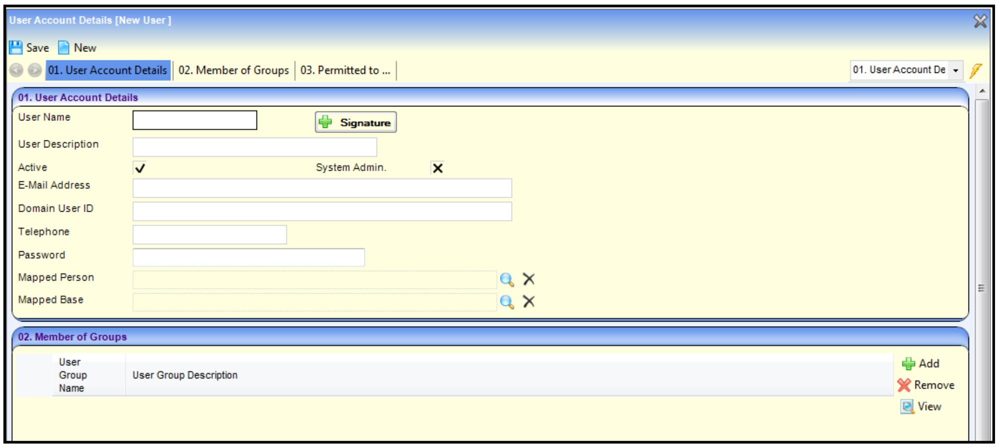
	Admin	School Support	Plan	Report	Invoice	SLA	Eval. Areas	Mapped to:
EPM Administrator	x	x	x	x	x	x	x	
EPM User		x					x	A Person
EPM Reporter				x				
EPM Plan			x					
EPM Services		x		x	x	x		
EPM Base		x					x	A Base

More Information:
RG_Permissions and *RG_ACL_ACL Definition* reference guides available from One Publications and My Account.

Mapping a User to a Person

Mapping a user to a person enables appointments to be added to their Outlook calendar. For information about setting up the link to a person's Outlook calendar, see Setting Up the Link to Outlook on page *16*.

1. In the v4 Client, select **Tools | Administration | User Management | User Accounts** to create a new user or open an existing user account.
2. Enter the **User Name** and other user details on the **User Account Details** panel.



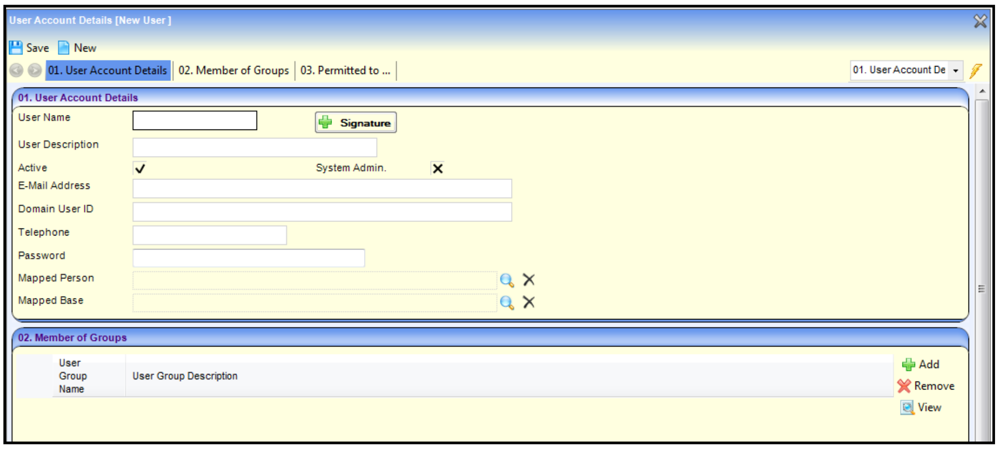
3. Click the **Mapped Person** browse button to display the **Person Enquiry** dialog.
4. Enter your search criteria and click the **Search** button to display a list of matching people.
5. Highlight the required person in the list and click the **Select** button to associate them with the user account.
6. Click the **Save** button.

Mapping a User to a Base

A user who is mapped to a base, e.g. a school, will only see information related to their base.

To map a user to a base:

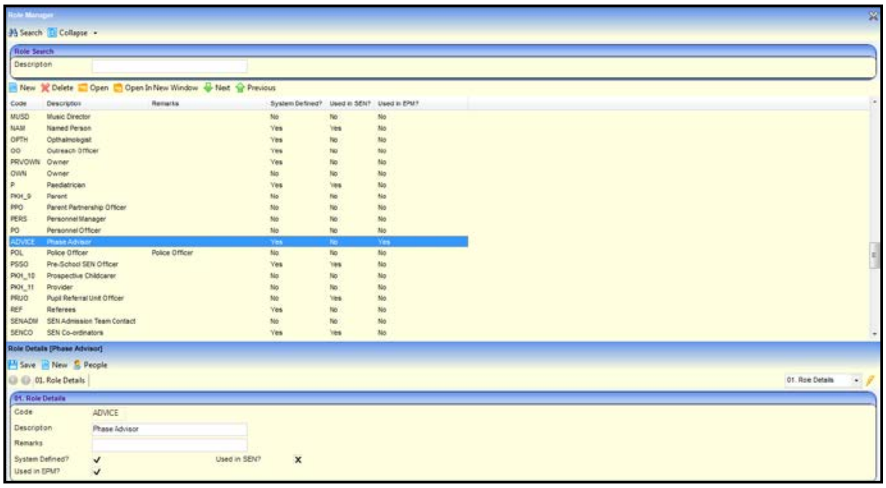
1. In the v4 Client, select **Tools | Administration | User Management | User Accounts**.



2. Enter the **User Name** and other user details on the **User Account Details** panel.
3. Click the **Mapped Base** browse button to display the **Base Enquiry** dialog.
4. Enter your search criteria and click the **Search** button to display a list of matching bases.
5. Highlight the required base in the list and click the **Select** button to associate it with the user account.
6. Click the **Save** button.

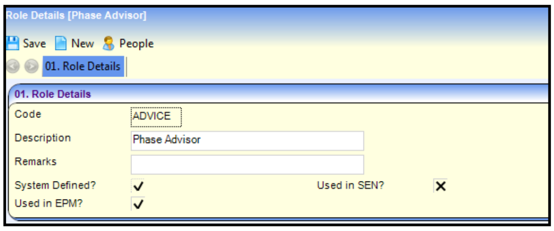
Assigning a Person to an EPM Role

To be available for selection in EPM, a person must be assigned to a role in the v4 Client via **Tools | Administration | Role Manager** and the **Used in EPM?** check box must be selected.

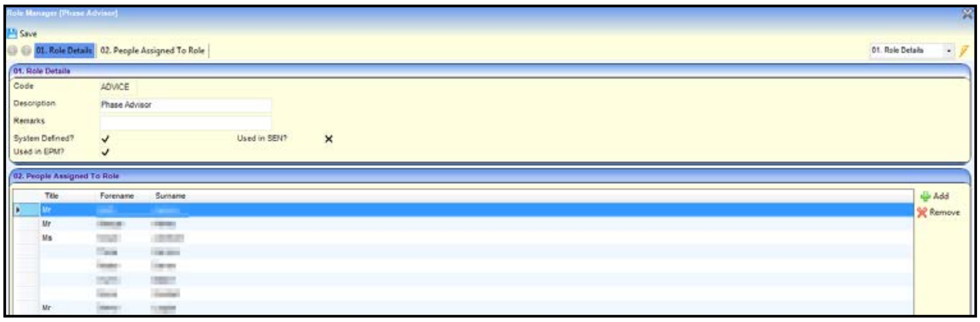


To assign a new person to a role:

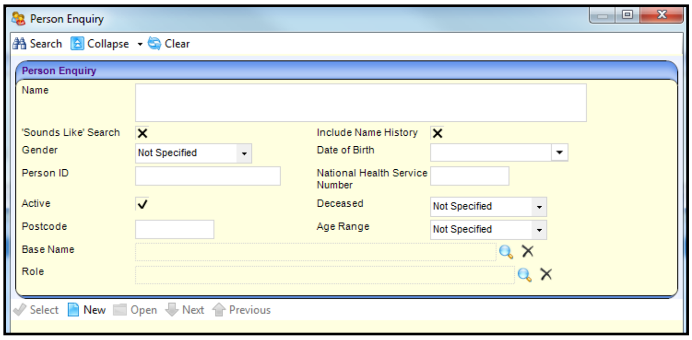
1. Select **Tools | Administration | Role Manager**.
2. Select a role and click the **Open In New Window** button to display the **Role Details** screen.



3. Select the **Used in EPM?** check box to display a tick.



4. Click the **Add** button on the **People Assigned to Role** panel to display the **Person Enquiry**.



5. Enter search criteria and click the **Search** button to display a list of matching people.
6. Highlight the required person in the list and click the **Select** button to add this person to the list of **People Assigned to Role**.
7. Click the **Save** button.

Setting Up the Link to Outlook

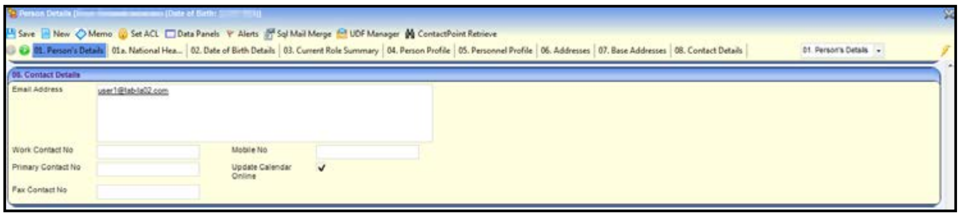
If a user is mapped to a person, school support bookings are added to their Outlook calendar.

More Information:

For information about configuring the Outlook Calendar, refer to the *Technical Guide: Deploying and Configuring EPM for Local Authorities* available on My Account on the One Publications website (www.onepublications.com).

The link to the appropriate calendar in Outlook is via the person's e-mail address, stored in the v4 Client on the **Person Details | Contact Details** panel as follows:

1. Select **Focus | People | Person** to display the **Person Enquiry** page.
2. Search for the required person.
3. Select the person and click the **Open In New Window** button to display the **Person Details** page.
4. Select the **Contact Details** panel and enter an **Email Address**.



5. Click the **Save** button.

Lookup Tables

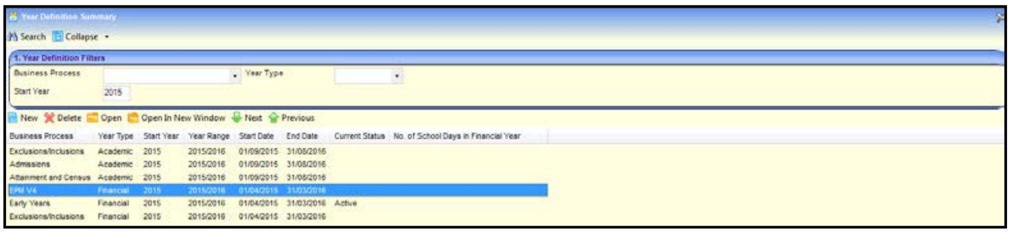
Lookup tables are created and updated by the System Administrator in the v4 Client via **Tools | Administration | Lookups**. The following are EPM specific lookup tables.

Table ID	Description	Area of Use
0500	EPM Activity Status	Plan | Activity
0501	EPM National Priority	Plan | Activity
0502	EPM Funds	Plan | Activity
0503	EPM Cost Centres	Plan | Activity
0504	Responsibility/Success Outcome	Plan | Responsibility/Success
0511	Invoice Prefix	School Support/Booking | Edit
0816	Status	School Support/Booking | Action Points
0830	SLA Type	v4 Client: **Focus | Services | Service Level Agreements | Maintain Service Level Agreement**
0831	SLA Units	**v4 Client: Focus | Services | Service Level Agreements | Maintain Service Level Agreement**
0832	EPM Related Plans	Plan

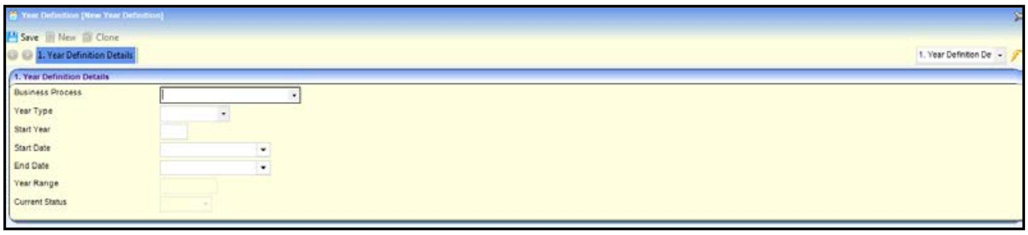
Setting Up a New Financial Year

To set up a new EPM financial year:

1. In the v4 Client, select **Tools | Year Settings | Year Definitions** to display the **Year Definition Summary** page.



2. Click the **New** button to display the **New Year Definition** screen.



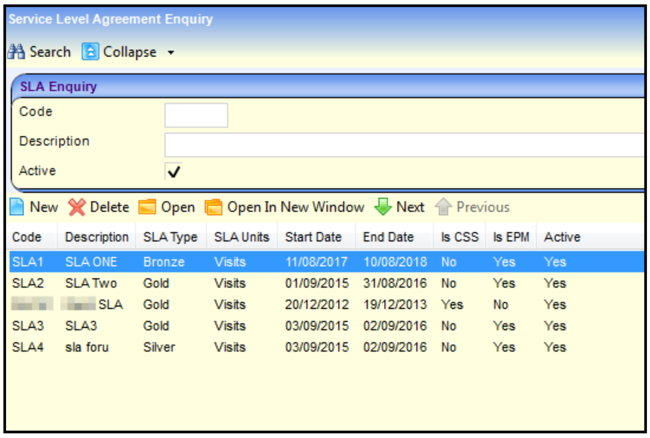
3. Select **EPM v4** from the **Business Process** drop-down.
4. Select **Financial** from the **Year Type** drop-down.
5. Enter a **Start Year**.
6. Select a **Start Date** and **End Date**.
7. Click the **Save** button.

Defining a New SLA

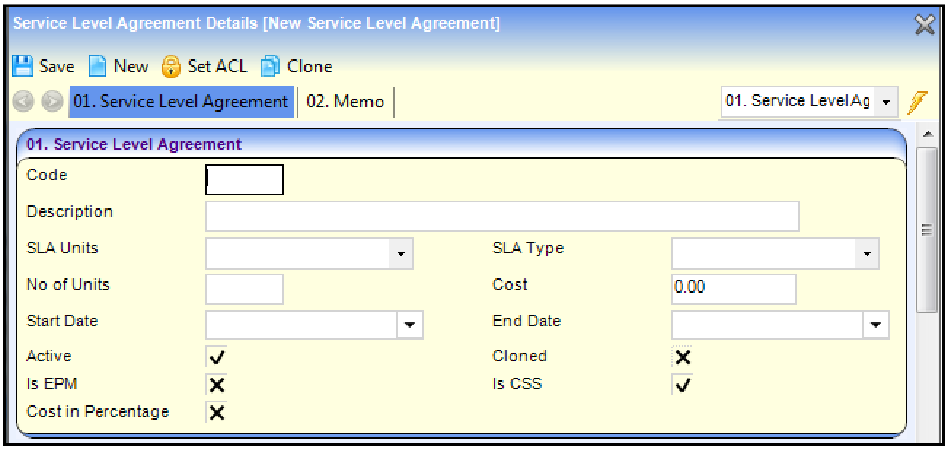
Service Level Agreements (SLAs) for EPM are defined in the v4 Client and can be associated with bases within the EPM portal. The costs associated with the EPM SLAs can be applied to the respective school support/booking costs.

To set up a new EPM Service Level Agreement:

1. In the v4 Client, select **Focus | Services | Service Level Agreements | Maintain Service Level Agreement** to display the **Service Level Agreement Enquiry** page.



2. Click the **New** button to display the **New Service Level Agreement** screen.



3. Enter a **Code** and **Description**.
4. Select **SLA Units** (*Lookup Table ID: 0831*).

5. Select an **SLA Type** (*Lookup Table ID: 0830*).
6. Enter **No of Units** to be provided.
7. Enter the **Cost**.
8. Enter the **Start Date** and **End Date**.
9. Select the **Is EPM** check box to display a tick. Only SLAs which have this check box selected are available for selection in EPM Provider portal.
10. If the SLA is required as a percentage, select the **Cost in Percentage** check box to display a tick.

    For example, if **Cost** =25, when the SLA is applied, it will be calculated as 25% of the school support amount. For more information, see Adding Costs for School Support on page *68*.
11. Click the **Save** button.

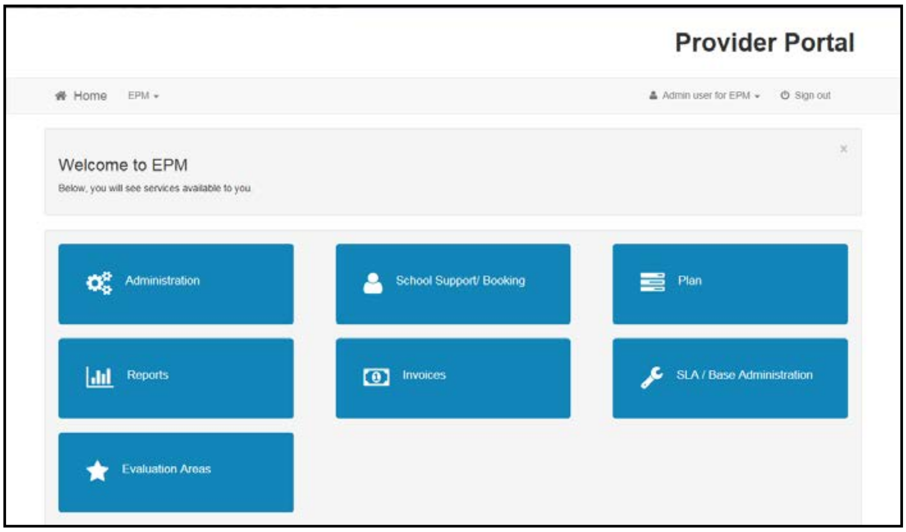
NOTE: *An existing SLA can be cloned by selecting an SLA and clicking the* ***Clone*** *button.*

Setting Up in v4 Client

05 | EPM Administration

Introduction

The **Welcome to EPM** page is displayed when you login to the EPM Provider portal. This page displays the areas to which you have access.



Click the **Administration** button to display the **Administration** page.

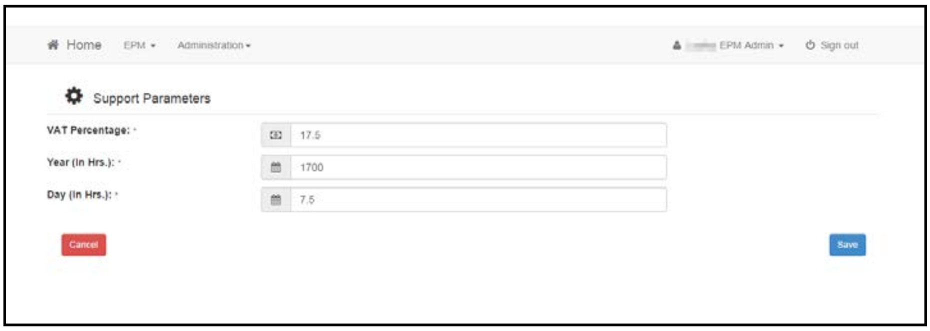
Managing Defaults

Managing Support Parameters

The default parameters used throughout EPM can be viewed and updated.

Viewing the Support Parameters

1. Click the **Administration** button on the **Welcome to EPM** page.
2. Click the **Defaults** button to display the **Support Parameters** page.



Amending Support Parameters

1. View the support parameters. For more information, see Viewing the Support Parameters on page *21*.

   If required, amend the following parameters:

   - **VAT Percentage**: The percentage of VAT that is included in support costs. It defaults to 17.50.
   - **Year (In Hrs.):** The number of decimal hours that is considered to constitute a year when calculating the support cost for the Annual fee type. The default is 1700.00.
   - **Day (In Hrs.)**: The number of decimal hours that is considered to constitute a day when calculating support cost for the daily fee type. The default is 7.50.

2. Click the **Save** button.

Administering Business Units

Introduction

A business unit can be shared or modular. If a business unit is shared, all users have access to it. If a business unit is modular, users must be assigned to it in order to have access. For more information, see Assigning User Access to a Business Unit on page *25*.

Local Authorities can mark a business unit as a traded service, defining a contact email address and phone number.

When a new business unit is defined, parameters relating to it are set up. Activities and users are assigned to business units.

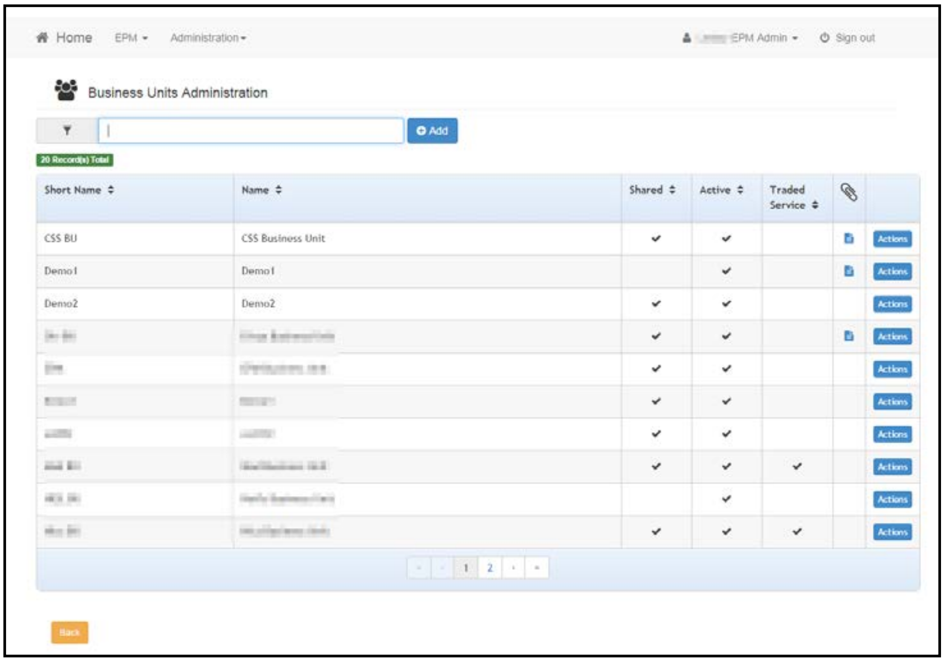
A business unit that is no longer required can be made inactive. This means that it is no longer displayed, but does not require the attached sub records such as people and user codes to be removed.

***NOTE:** To use EPM without using business units, accept the default EPM business unit, which has roles, people and user codes already assigned.*

Displaying a List of Business Units

1. Click the **Administration** button on the **Welcome to EPM** home page to display the **Administration** page.

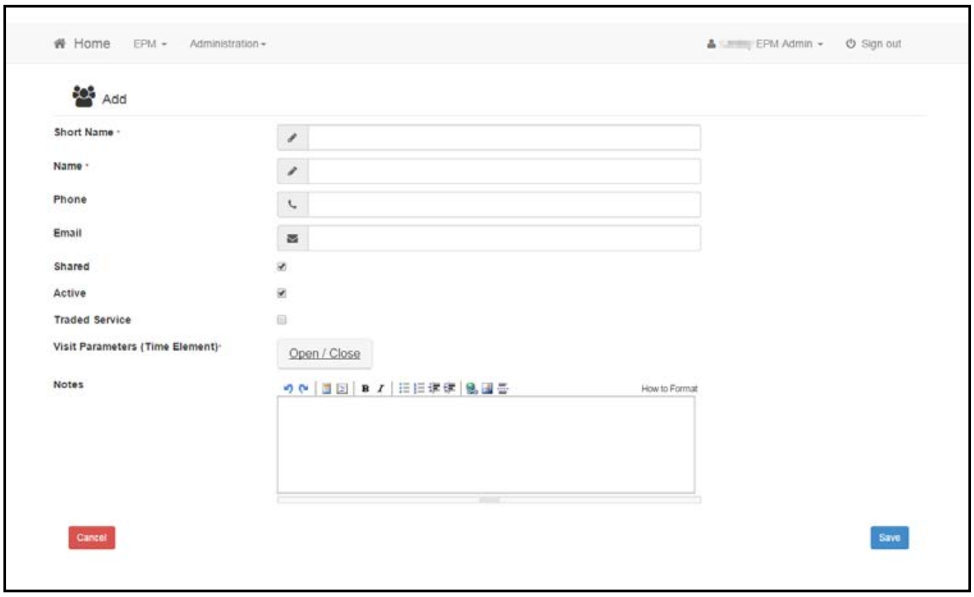
2. Click the **Business Units Administration** button to display the **Business Units Administration** page.



3. If required, enter a full or partial **Short Name** or **Name** to filter the list of business units.
4. If required, click on a column heading to sort the list.

Adding a New Business Unit

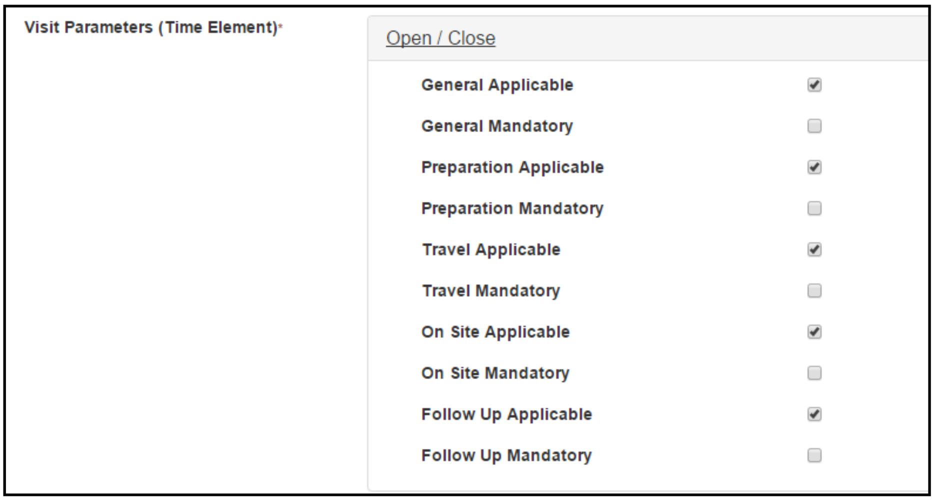
1. Display the list of business units. For more information, see Displaying a List of Business Units on page *22*.
2. Click the **Add** button to display the **Add** page.



3. Enter a **Short Name** for the business unit, which must be unique.
4. Enter a **Name**.
5. If required, enter a **Phone** number.
6. If required, enter an **Email** address.
7. If the business unit is modular i.e. it is <u>not</u> shared by all users with the required permissions, deselect the **Shared** check box so that only users associated with the business unit are able to access its details.
8. If required, select the **Traded Service** check box.

> ***NOTE:*** *A traded service is one that generates income from a range of activities such as selling services directly to users.*

9. If required, enter **Notes**.
10. **Visit Parameters (Time Element)** can be selected as follows:
    a. If required, click the **Open / Close** button to display the list of parameters.

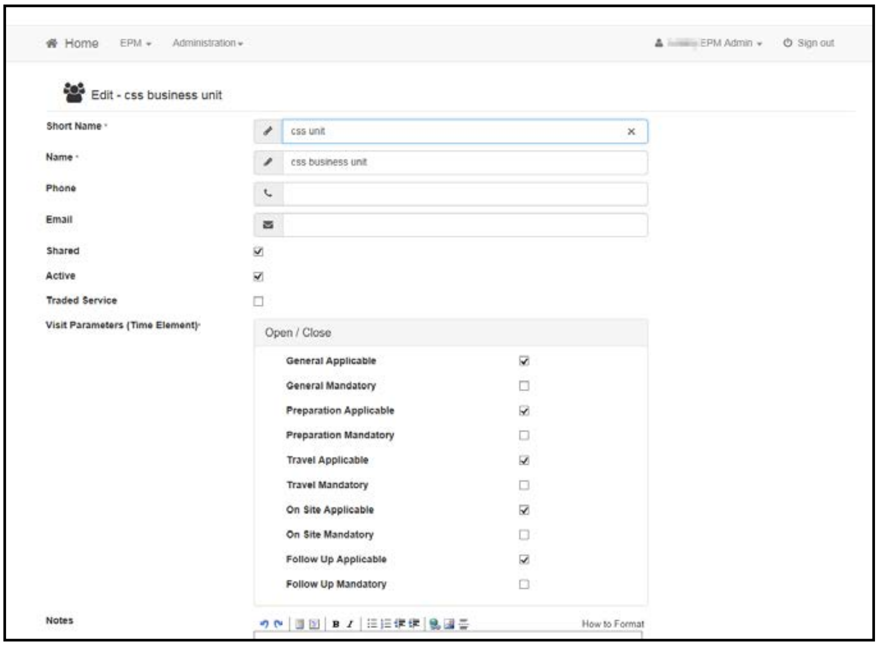


    b. Select the check boxes for the required parameters.
11. Click the **Save** button.

Updating Business Unit Details

The details of a business unit can be updated. This includes making the business unit inactive.

1. Display the list of business units. For more information, see Displaying a List of Business Units on page *22*.
2. Select the required business unit.
3. Click the **Actions** button adjacent to the required business unit.
4. Click the **Edit** button to display the **Edit** page.

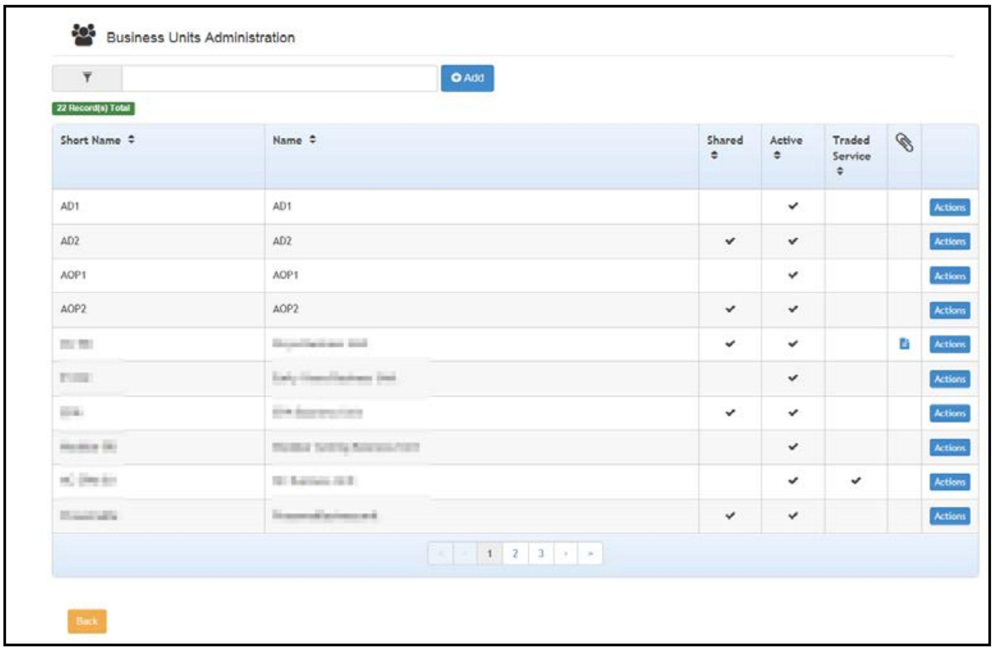


5. Change the details as required.
6. If required, de-select the **Active** check box to make a business unit inactive.
7. Click the **Save** button.

Assigning User Access to a Business Unit

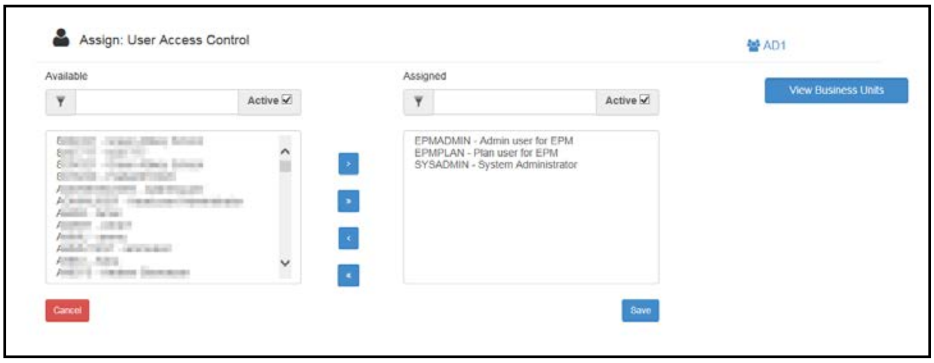
User access can be set if a business unit is non-shared.

1. Display a list of business units. For more information, see Displaying a List of Business Units on page 22.



2. Click the **Actions** button adjacent to the required non-shared business unit to display the **Actions** dialog.

3. Click the **Access Control** button to display the **Assign: User Access Control** page.



4. Arrow buttons are available to move the user codes from **Available** to **Assigned** or vice versa.
5. To assign a code to the current business unit, highlight the required code in the list of available codes and click the right arrow button.
6. Alternatively, to assign all codes in the list, click the double arrow button.
7. Click the **Save** button.

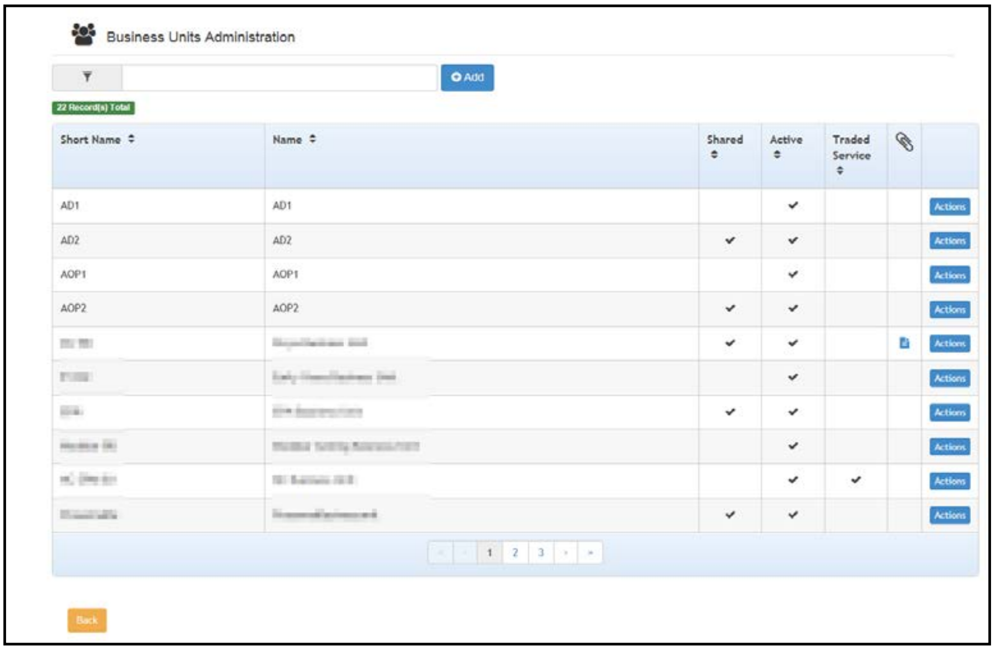
Assigning People to a Business Unit

If a business unit is not shared, one or more people can be assigned to it. However, they must already be assigned to a role that is assigned to the business unit.

For more information, see Assigning Roles to a Business Unit on page 37.

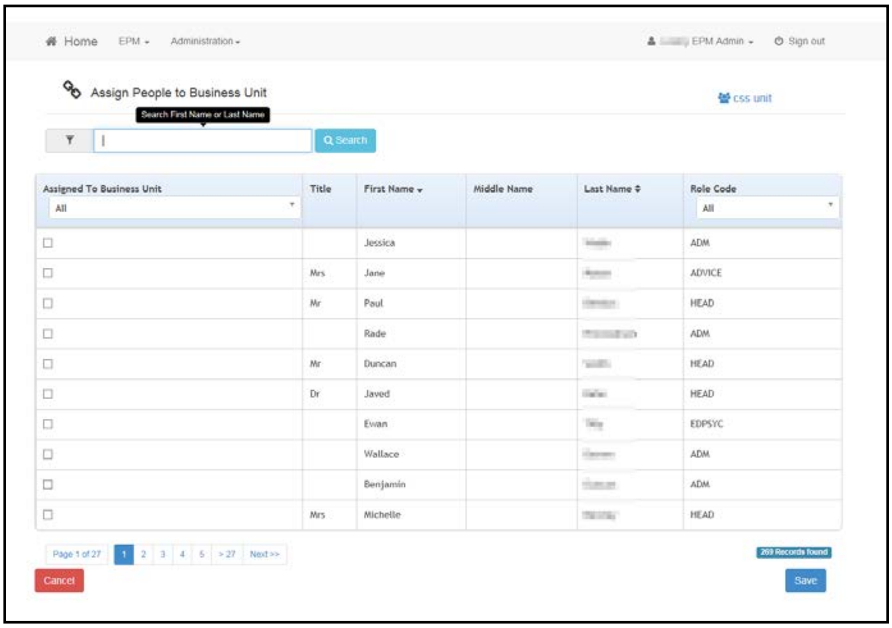
> ***NOTE:*** *People are assigned to roles in the v4 Client via* ***Tools | Administration | Role Manager****. For more information, see* [*Assigning a Person to an EPM Role*]() *on page 15.*

1. Display a list of business units. For more information, see [Displaying a List of Business Units]() on page 22.



2. Click the **Actions** button adjacent to the required non-shared business unit to display the **Actions** dialog.

3. Click the **People** button to display the **Assign People to Business Unit** page. This page lists all people who are assigned to a role that is assigned to this business unit.



4. If required, enter a full or partial **First Name** or **Last Name** and click the **Search** button to display a list of matching people.
5. If required, filter the list of people as follows:
   a. Select an **Assigned to Business Unit** filter from the drop-down.
   b. Select a **Role Code** from the drop-down.
6. Select the check boxes for the users you want to assign to this business unit.
7. Click the **Save** button.

Assigning a User Code to a Business Unit

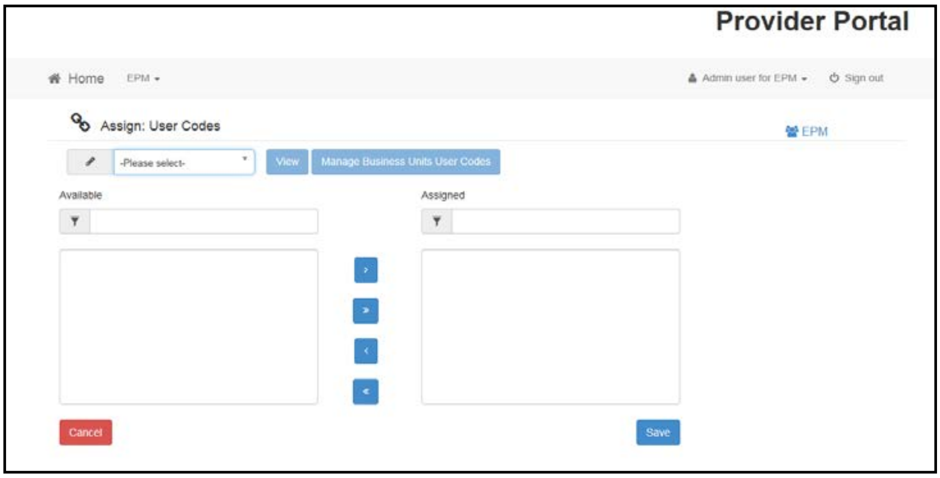
Activities, support types, target groups, focus codes, fee codes and monitoring codes can be assigned to specific business units.

When user codes are created, they are automatically assigned to the EPM business unit. You can define unit-specific lookup tables by assigning the user codes to specific business units.

For details of how to assign activities to a business unit, see Assigning Projects and Activities to a Business Unit on page *29*.

To assign support types, target groups, focus codes, fee codes and monitoring codes to a business unit:

1. Display a list of business units on the **Business Units Administration** page. For more information, see Displaying a List of Business Units on page *22*.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **User Codes** button to display the **Assign: User Codes** page.



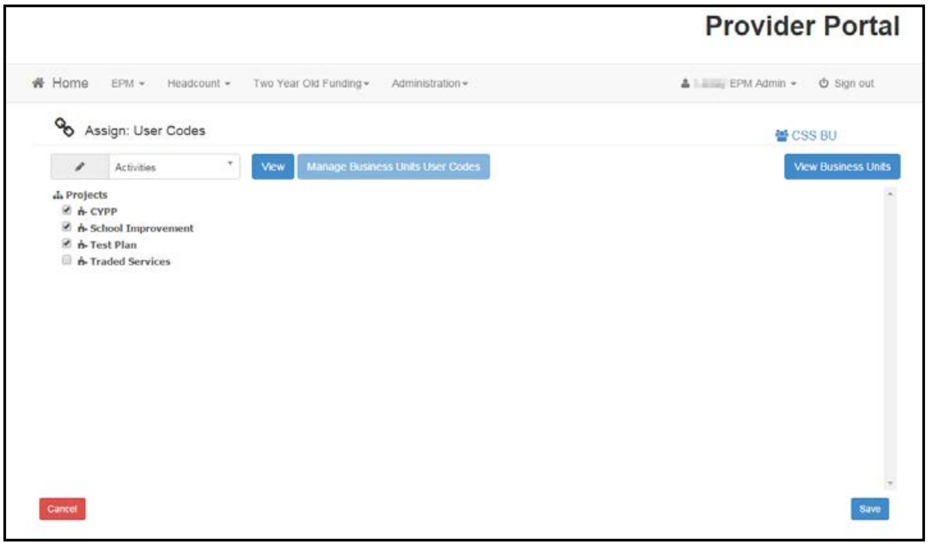
4. Select the required lookup type from the drop-down list and click the **View** button:

Arrow buttons are available to move the user codes from **Available** to **Assigned** or vice versa.

5. To assign a code to the current business unit, highlight the required code in the list of available codes and click the right arrow button.
6. Alternatively, to assign all codes in the list, click the double arrow button.
7. Click the **Save** button.

Assigning Projects and Activities to a Business Unit

1. Display a list of business units. For more information, see Displaying a List of Business Units on page *22*.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **User Codes** button to display the **Assign: User Codes** page.
4. Select **Activities** from the drop-down.
5. Click the **View** button to display a list of available projects. Projects assigned to the business unit have the check box selected.

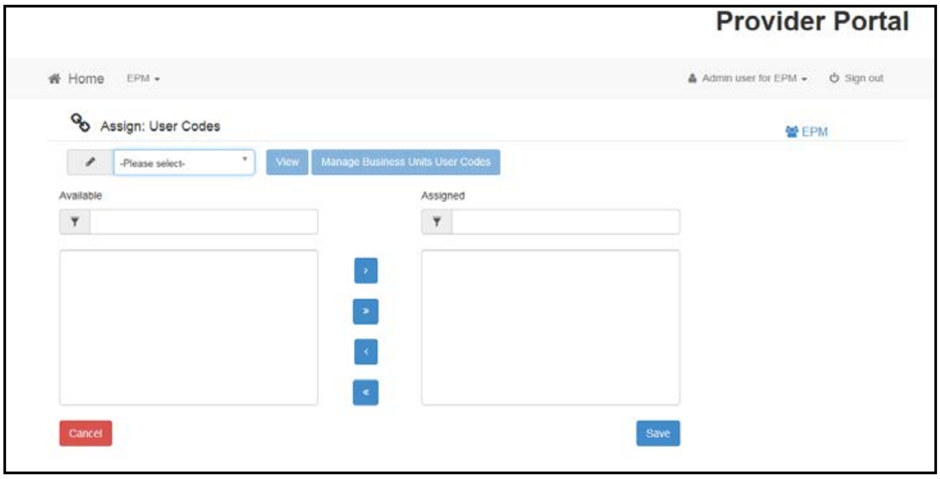


6. Select the required check box.
7. Click the **Save** button.

Viewing User Codes for a Business Unit

User codes can be assigned to specific business units. This enables unit-specific lookup tables to be used. The user codes assigned to the business unit can be viewed as follows:

1. Display a list of business units on the **Business Units Administration** page. For more information, see Displaying a List of Business Units on page *22*.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **User Codes** button to display the **Assign: User Codes** page.



4. Select the required lookup type from the drop-down list and click the **View** button:
   - Activities. For more information, see Viewing Activities Assigned to a Business Unit on page *31*.
   - Support Type
   - Focus Codes
   - Fee Codes
   - Monitoring Codes.

   For the other types of user code, a list of **Available** and **Assigned** user codes is displayed. For example, the following graphic displays a list of **Focus Codes**.

Deselecting a User Code

To deselect (unassign) a user code form the business unit:

1. Display the available user codes. For more information, see Viewing User Codes for a Business Unit on page *29*.

   Arrow buttons are available to move the user codes from **Available** to **Assigned** or vice versa.
2. Highlight the required code in the list of assigned codes and click the left arrow button.
3. Click the **Save** button.

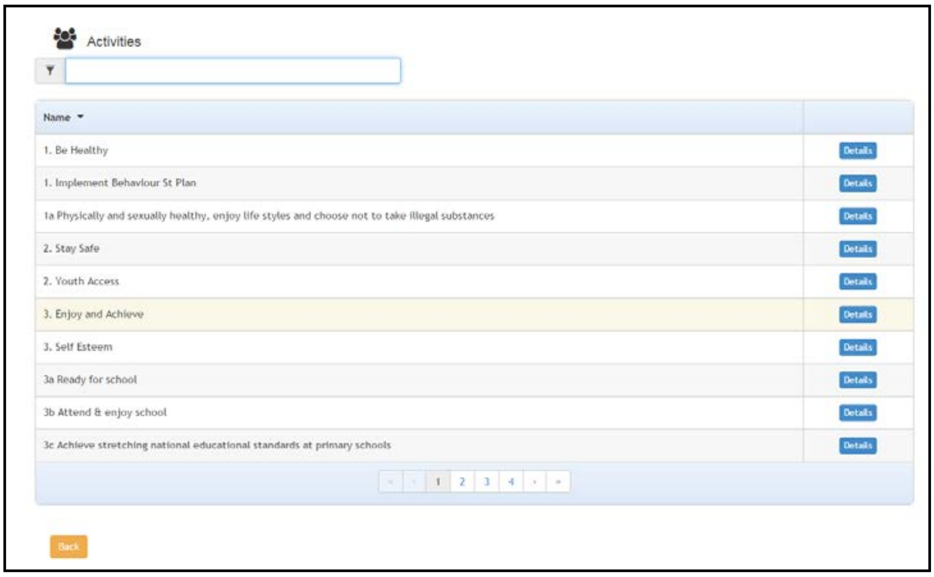
> ***NOTES:*** *Teaching quality, which was available in v3, is not included in EPM Provider portal. If you deselect a focus code that has a teaching quality record attached, a confirmation message is displayed. If you click the **Yes** button, the association between the teaching quality and the focus code is removed and it will not be displayed on the v3 teaching quality screen.*
>
> *A user code that is attached to a school support or evaluation area record cannot be deselected.*

Viewing Activities Assigned to a Business Unit

A list of all activities and the associated business units can be displayed.

1. Display a list of business units. For more information, see Displaying a List of Business Units on page *22*.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **User Codes** button to display the **Assign: User Codes** page.
4. Select **Activities** from the drop-down.
5. Click the **View** button to display a list of available projects. Projects assigned to the business unit have the check box selected.

6. Click the **View Business Units** button to display a list of **Activities**.

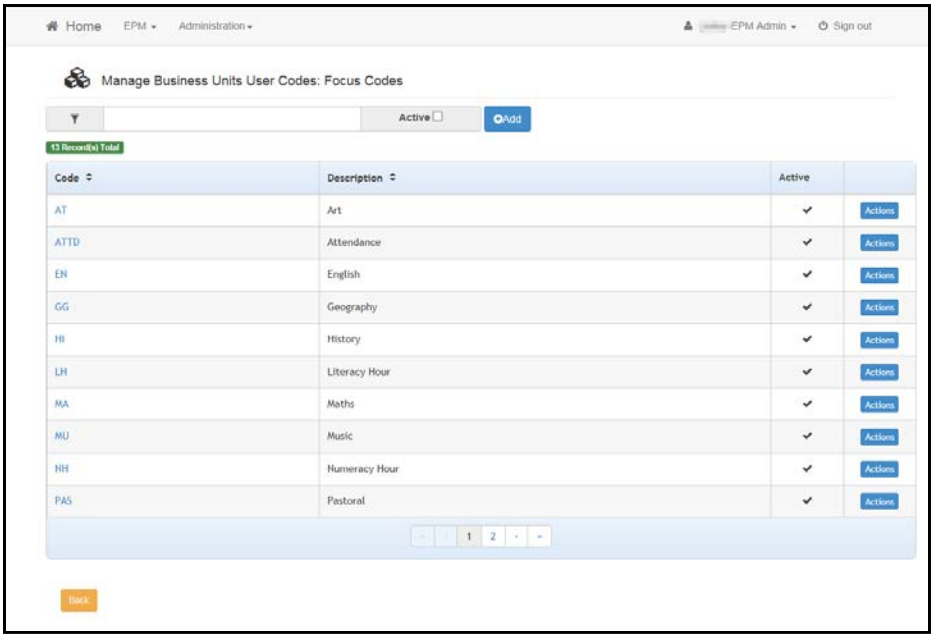


7. If required, click the **Details** button to see the Business Units associated with the selected activity.

Adding a New Focus Code or Support Type

Focus codes are used to specify the subject on which the support is focused. Multiple focus codes can be associated with an activity. Support types specify the type of support offered.

1. Display the available user codes. For more information, see Viewing User Codes for a Business Unit on page *29*.
2. Select either **Focus Code** or **Support Type** from the drop-down.
3. Click the **Manage Business Units User Codes** button to display the **Manage Business Units User Codes** page. The following graphics show the process for adding a new focus code although a support type can be added in a similar manner:



4. Click the **Add** button to display the user code **Add** page. For example, the following graphic displays the **Focus Codes: Add** page:

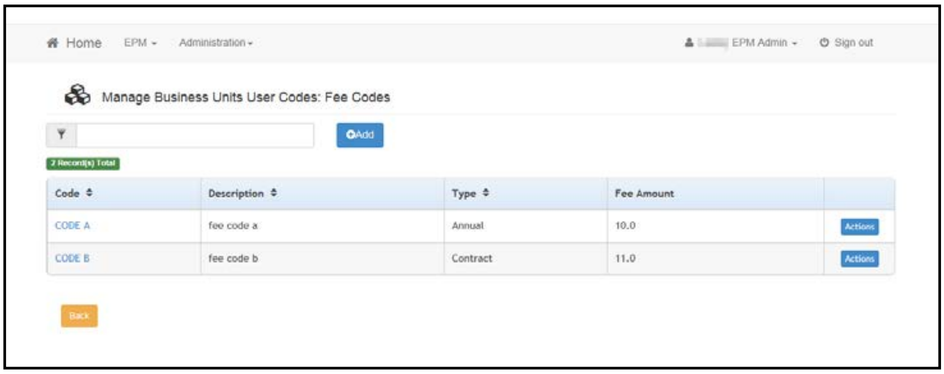
5. Enter a **Code**.
6. Enter a **Description**.
7. Click the **Save** button.

Adding a New Fee Code

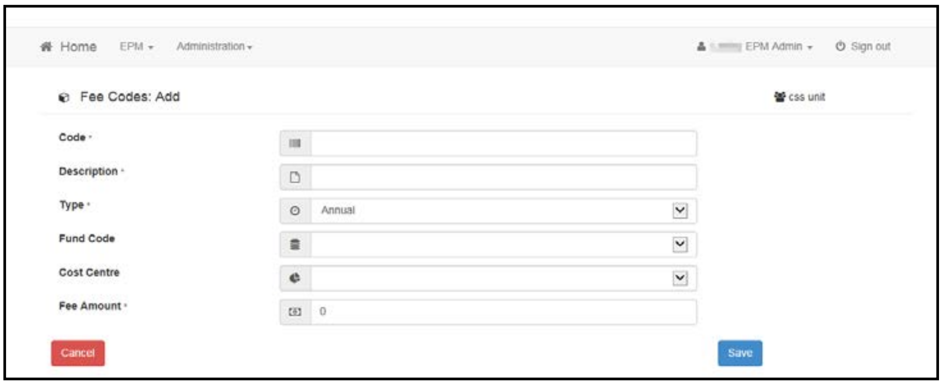
Fee codes are used to define costs associated with the support offered. Fee codes include such information as the type (e.g. annual, contract, daily or fixed), the cost centre against which the cost will be recorded and the amount charged. For more information, see Calculating the Cost of Support on page *33.*

1. Display the available user codes and select **Fee Code** from the drop-down. For more information, see Viewing User Codes for a Business Unit on page *29*.

2. Select **Fee Codes** from the drop-down.
3. Click the **Manage Business Units User Codes** button to display the **Manage Business Units User Codes: Fee Codes** page.



4. Click the **Add** button to display the **Fee Codes: Add** page.



5. Enter a **Code**.
6. Enter a **Description**.
7. Select a **Type** from the drop-down list.
8. If required, select a **Fund Code**.
9. If required, select a **Cost Centre**.
10. Enter a **Fee Amount**.
11. Click the **Save** button.

Calculating the Cost of Support

The fee type determines the calculations used to record a support cost. The following fee types and related calculations are available:

Annual

The fee is an amount per year, e.g. the annual salary of a visitor. The Fee Amount and the number of hours in a year (defined in the Support Parameters) are used to calculate an hourly rate. For more information, see Managing Support Parameters on page *21*.

Hourly Rate = Fee Amount / Number of Hours in a Year

Support Cost = Hourly Rate * Elapsed Time

Contract

The fee is a fixed amount, agreed for a pre-determined contract.

Support Cost = Fee Amount.

Daily

The fee is an amount per day. The number of hours in a day (defined in the Support Parameters) is used to calculate an hourly rate. For more information, see Managing Support Parameters on page *21*.

Hourly Rate = Daily Fee Code Amount / Number of Hours in a Day

Support Cost = Hourly Rate * Elapsed Time

Fixed

The fee is a fixed amount.

Support Cost = Fee Amount.

Hourly

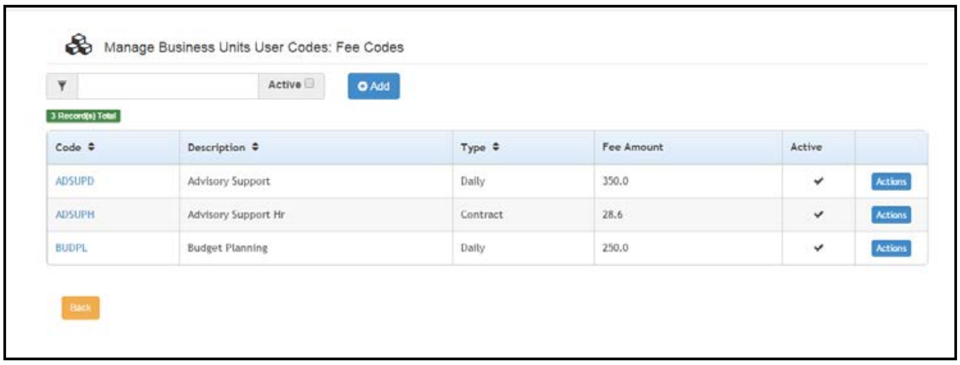
The fee is an amount per hour.

Support Cost = Fee Amount * Elapsed Time

Updating a Fee Code

NOTE: *A fee code that has sub-records attached to it cannot be deleted but can be made inactive so that it is no longer available for selection.*

1. Display the available user codes and select **Fee Code** from the drop-down. For more information, see Viewing User Codes for a Business Unit on page *29*.
2. Select **Fee Codes** from the drop-down.
3. Click the **Manage Business Units User Codes** button to display the **Manage Business Units User Codes: Fee Codes** page.



4. Click the **Actions** button to display the **Actions** dialog.
5. Click the **Edit** button to display the **Fee Codes: Edit** page.

6. Update the required fields.

To make the code inactive, deselect the **Active** check box.

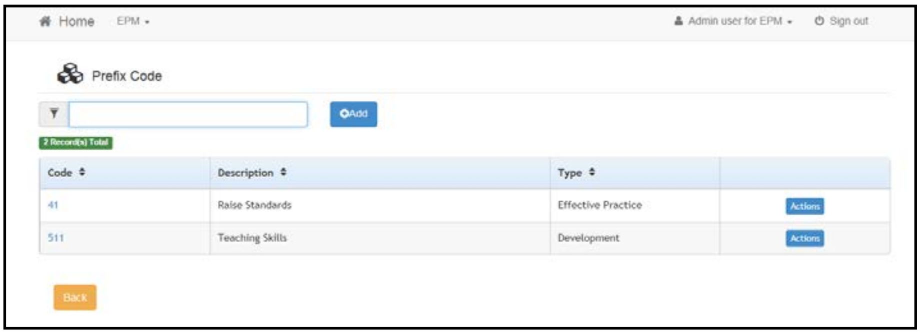
7. Click the **Save** button.

Adding a New Monitoring Code or Prefix Code

Monitoring codes are used in the monitoring of Areas of Effective Practice and Areas for Development. Monitoring codes consist of a prefix code followed by a monitoring code. A prefix code is used to group monitoring codes together, further subdividing the area of effective practice or development.

Adding a New Prefix Code

1. Display the available user codes and select **Monitoring Codes** from the drop-down. For more information, see Viewing User Codes for a Business Unit on page *29* .
2. Click the **Manage Business Units User Codes** button to display the **Prefix Code** page.

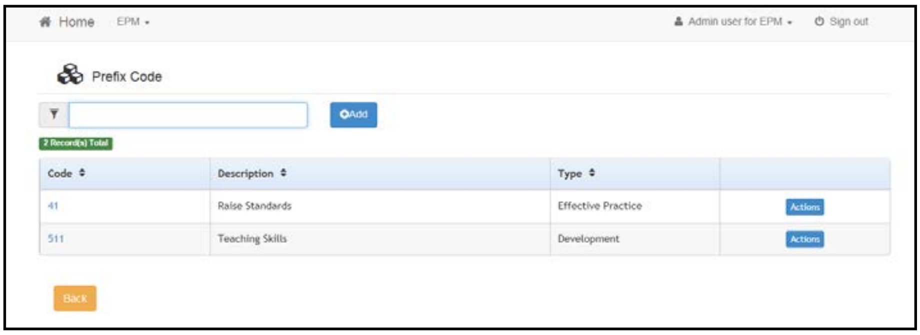


3. Click the **Add** button to display the **Prefix Code: Add** page.

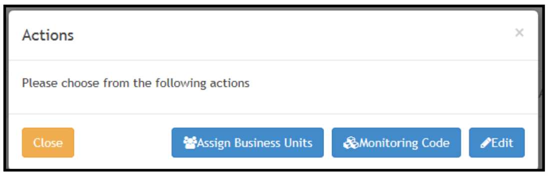
4. Enter a **Prefix Code** (maximum 3 digits).
5. Enter a **Description**.
6. Select a **Code Type** radio button.
7. Click the **Save** button.

Adding a Monitoring Code

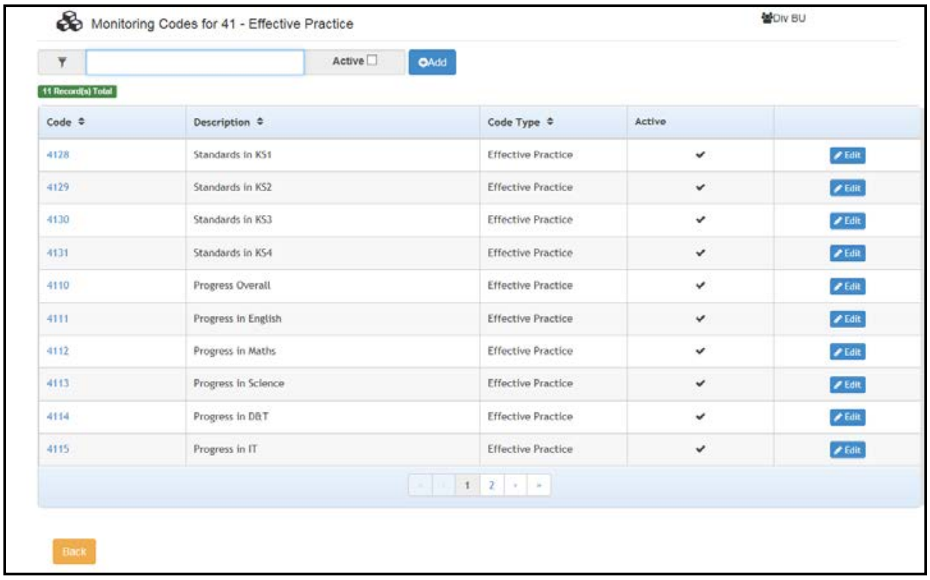
1. Display the available user codes and select **Monitoring Codes** from the drop-down. For more information, see Viewing User Codes for a Business Unit on page *29*.
2. Click the **Manage Business Units User Codes** button to display the **Prefix Code** page.



3. Click the **Actions** button adjacent to the required prefix code to display the **Actions** dialog.



4. Click the **Monitoring Code** button to display the **Monitoring Codes** page.



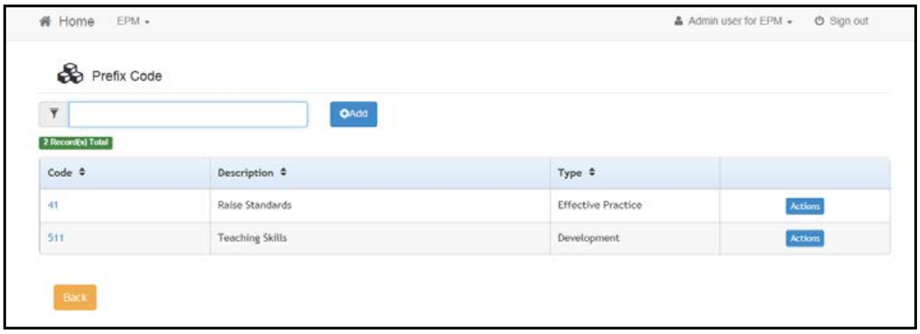
5. Click the **Add** button to display the **Monitoring Codes: Add** page.

6. Enter a **Code** (maximum 3 characters).
7. Enter a **Description**.
8. Click the **Save** button.

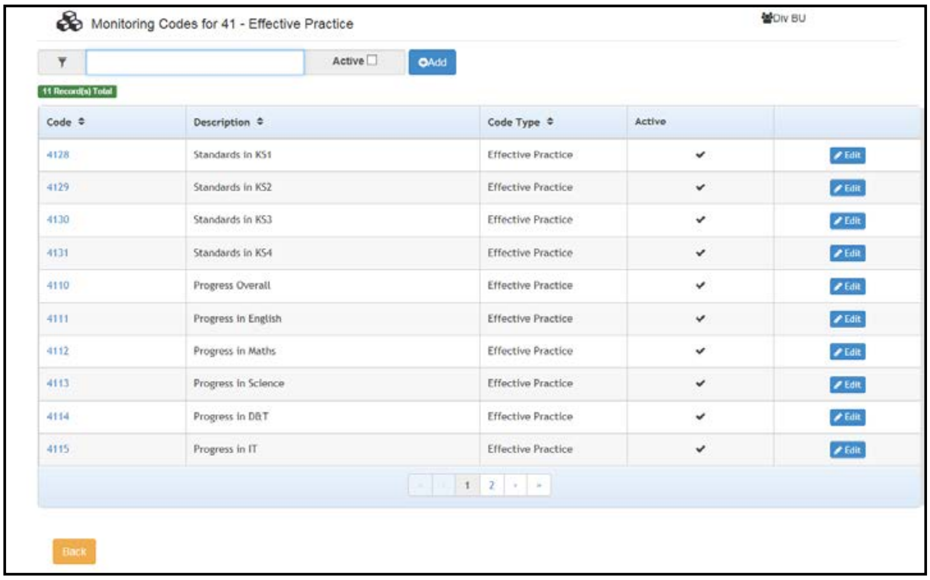
Updating a Monitoring Code

NOTE: *A monitoring code that has sub-records attached to it cannot be deleted but can be made inactive so that it is no longer available for selection.*

1. Display the available user codes and select **Monitoring Codes** from the drop-down. For more information, see [Viewing User Codes for a Business Unit](#) on page *29*.
2. Click the **Manage Business Units User Codes** button to display the **Prefix Code** page.



3. Click the **Actions** button adjacent to the required code to display the **Actions** dialog.
4. Click the **Monitoring Code** button to display the **Monitoring Codes** page.



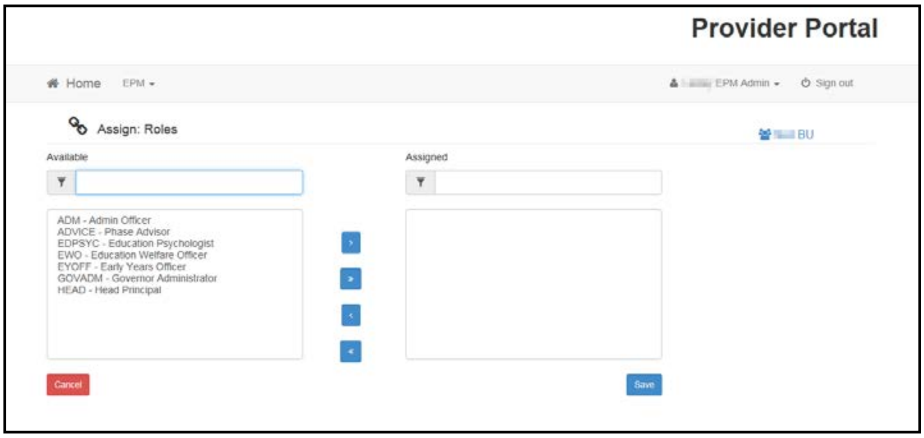
5. Click the **Edit** button to display the **Monitoring Code: Edit** page.

6. If required, enter a new **Description**.
7. If required, to make the monitoring code inactive, de-select the **Active** check box.
8. Click the **Save** button.

Assigning Roles to a Business Unit

You can assign user roles to specific business units. This enables the roles to be associated with people at the business unit.

1. Select the required business unit. For more information, see [Displaying a List of Business Units]() on page *22*.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **Roles** button to display the **Assign: Roles** page with a list of **Available** roles and already **Assigned** roles.



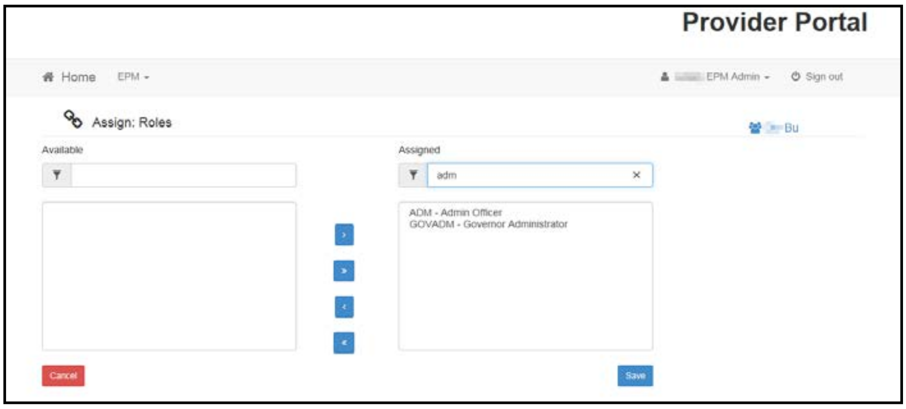
Arrows are available to move the roles from **Available** to **Assigned** or vice versa.

4. If required enter a partial role to filter either list.
5. Highlight the required role in the **Available** list and click the right arrow to move it to the **Assigned** list.
6. Click the **Save** button.

Removing Roles from a Business Unit

Assigned roles can be removed from a business unit and moved to the list of available roles.

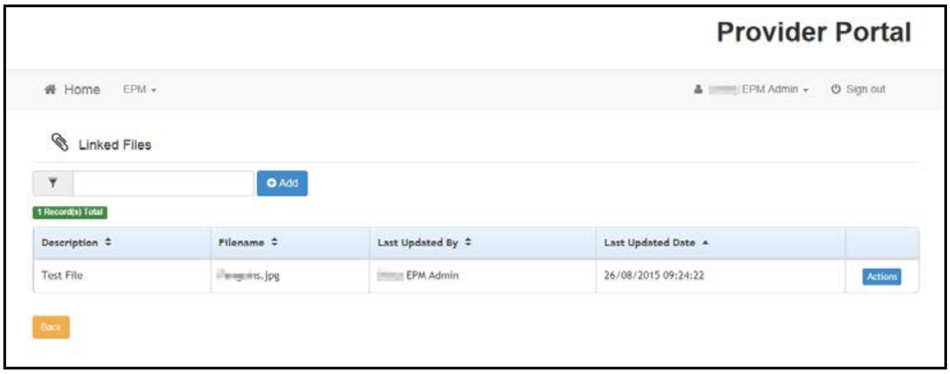
1. Select the required business unit. For more information, see [Displaying a List of Business Units]() on page *22*.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **Roles** button to display the **Assign: Roles** page with a list of **Available** roles and already **Assigned** roles.
4. If required enter a partial role to filter either list.



5. Highlight the required role in the **Assigned** list and click the left arrow to move it to the **Available** list.
6. Click the **Save** button.

Adding a Linked File to a Business Unit

1. Select the required business unit. For more information, see [Displaying a List of Business Units](#) on page *22*.
2. Click the **Actions** button adjacent to the required business unit.
3. Click the **Linked File** button to display the **Linked Files** page.

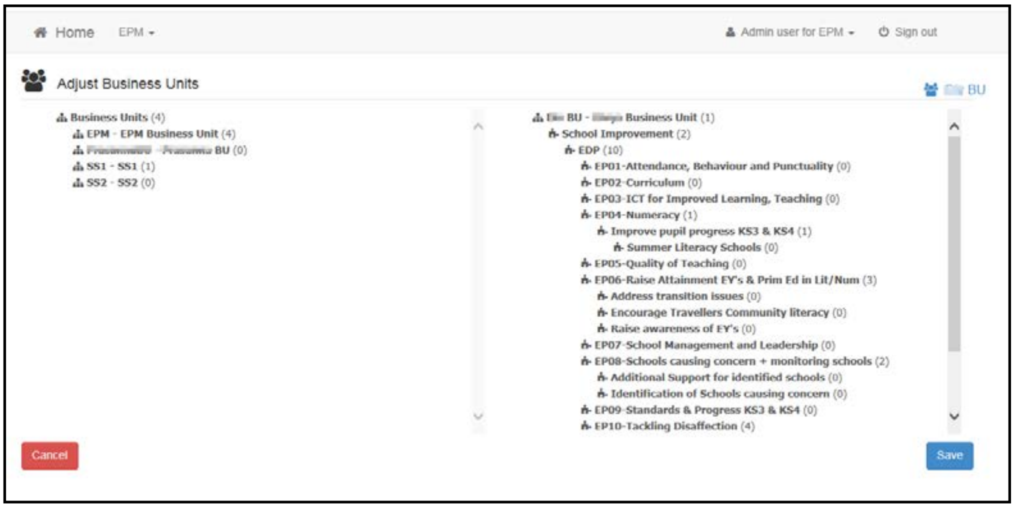


4. Click the **Add** button to display the **Linked Files** dialog.
5. Enter a **Description**.
6. Click the **Select File** button to display the **Choose File to Upload** dialog and choose the required file.
7. Click the **Save** button.

Adjusting Business Units

The Adjust Business Units functionality enables you to include additional EPM activities in a business unit.

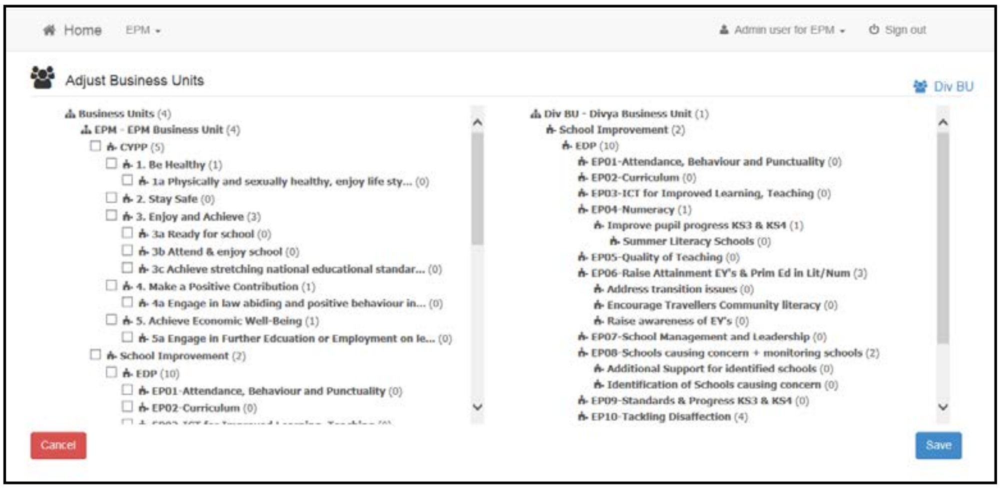
1. Display the list of business units. For more information, see [Displaying a List of Business Units](#) on page *22*.
2. Click the **Actions** button adjacent to the business unit that you wish to adjust.
3. Click the **Adjust Business Units** button to display the **Adjust Business Units** page.



The list on the left-hand side displays all business units and all EPM records under those business units.

The right-hand side displays the current business unit and a list of EPM records currently selected.

4. Click the button adjacent to a business unit on the left-hand side to expand the list of records beneath it, as shown in the following graphic:



5. Select the check boxes for the activities on the left-hand side that you wish to include in the current business unit to display the message:

   Do you want to move all of the associated EPM records for the selected activity to this business unit?

6. Click the **Yes** button.
7. Click the **Save** button.

Managing Business Units User Codes

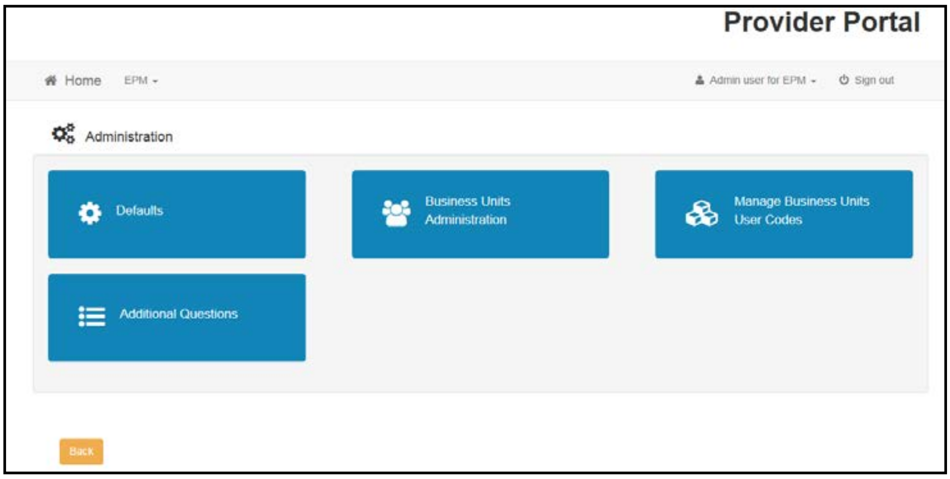
Introduction

This functionality enables you to define user codes to be used in EPM and assign them to the required business units. The types of user code are support types, focus codes, fee codes and monitoring codes.

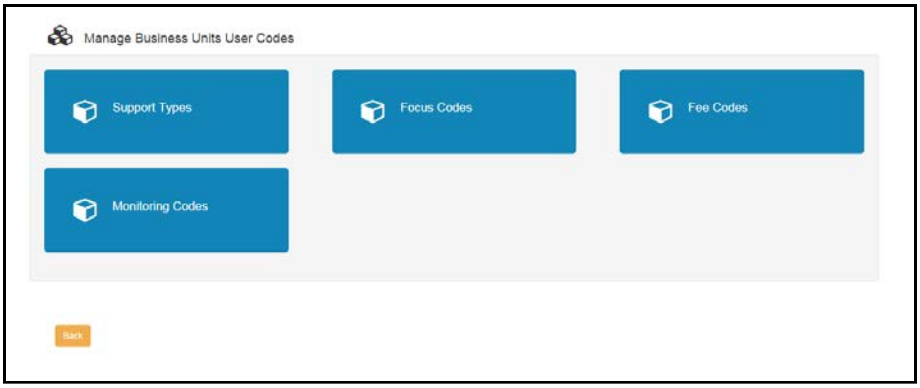
> ***NOTE:*** *Support types and focus codes are automatically added to the EPM business unit. The required business unit can be selected for a new fee code or monitoring code.*

Displaying User Codes

1. Click the **Administration** button on the **Welcome to EPM** home page to display the **Administration** page.



2. Click the **Manage Business Units User Codes** button to display the **Manage Business Units User Codes** page.



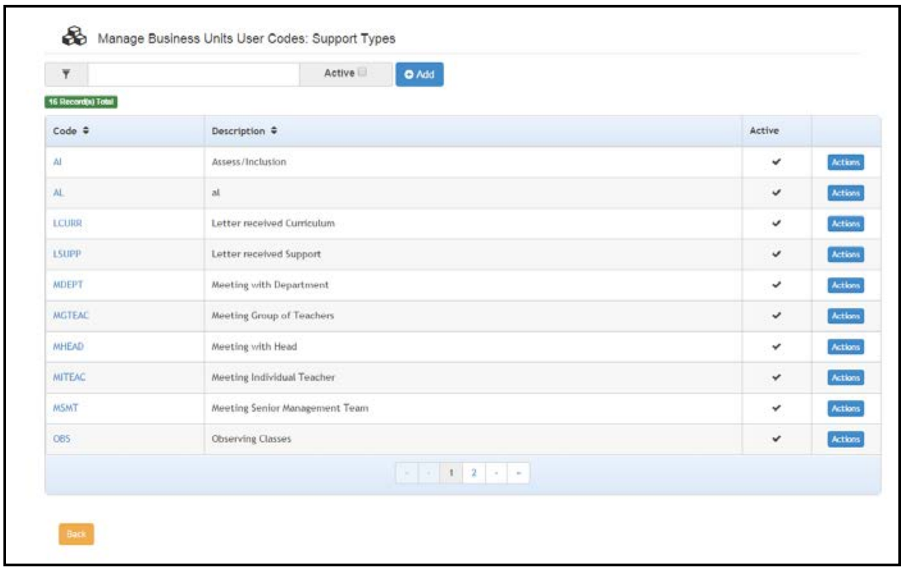
3. Click the required button to display a list of available user codes.

Managing Support Types

NOTE: *Support types are automatically assigned to the EPM business unit.*

Viewing Support Types

1. Display a list of available user codes. For more information, see Displaying User Codes on page *40*.
2. Click the **Support Types** button to display a list of available support types.



Adding a Support Type

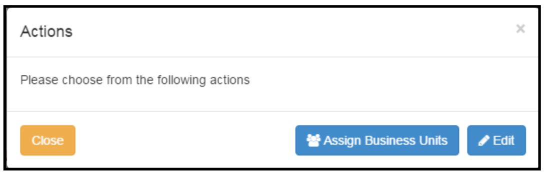
1. Display a list of available support types. For more information, see [Viewing Support Types](#) *on page 41*.
2. Click the **Add** button to display the **Support Types: Add** page.

3. Enter a **Code** and **Description**.
4. Click the **Save** button.

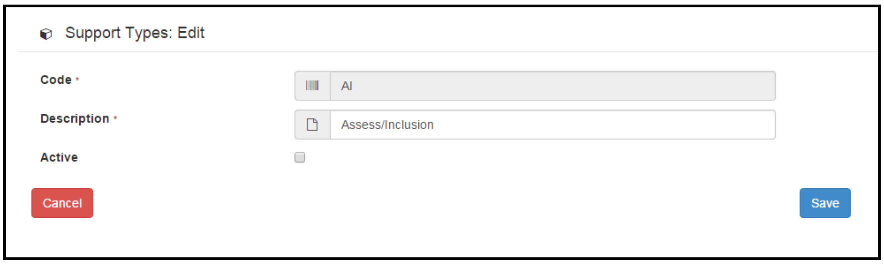
Editing a Support Type

The **Description** and **Active** status of the support type can be amended.

1. Display a list of available support types. For more information, see [Viewing Support Types](#) *on page 41.*
2. Click the **Actions** button adjacent to the support type that you want to edit to display the **Actions** dialog.



3. Click the **Edit** button to display the **Support Types: Edit** page.

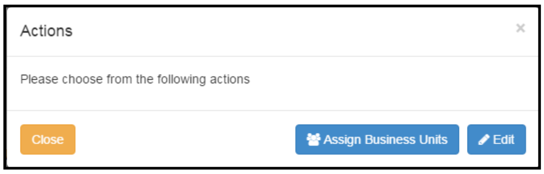


4. Make the required changes and click the **Save** button.

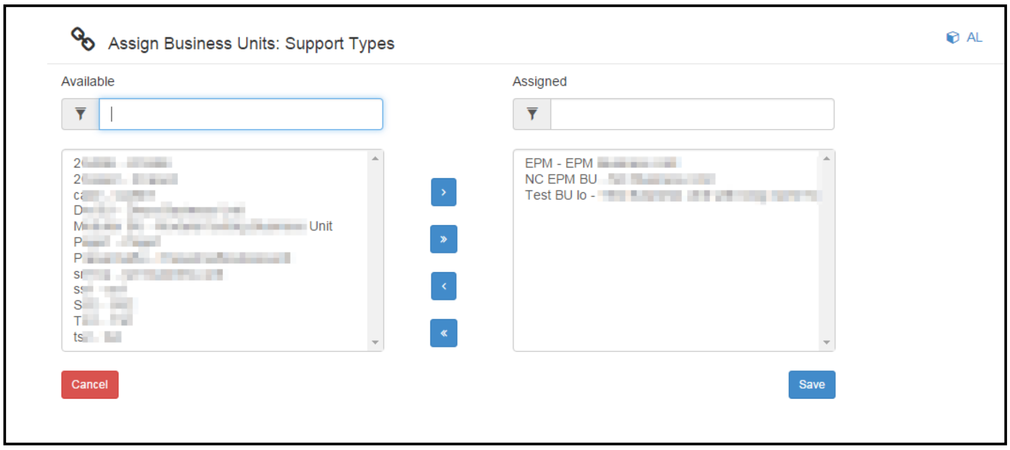
Assigning Business Units to a Support Type

A support type is automatically attached to the EPM business unit. Other business units can be assigned to the support type as follows:

1. Display a list of available support types. For more information see Viewing Support Types *on page 41*.
2. Click the **Actions** button adjacent to the support type that you want to edit to display the **Actions** dialog.



3. Click the **Assign Business Units** button to display the **Assign Business Units: Support Types** page. A list of **Available** business units and **Assigned** business units for the selected support type is displayed.



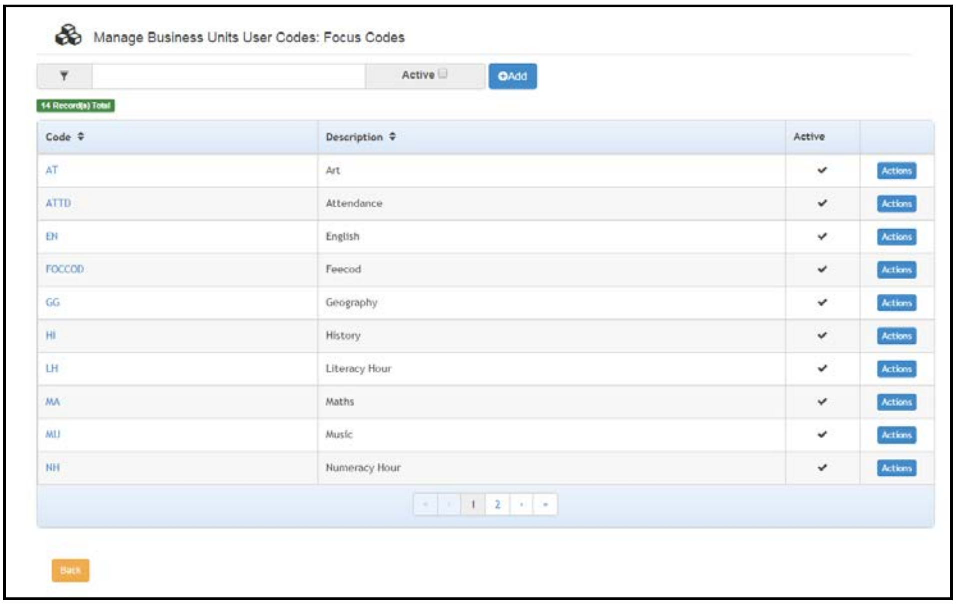
4. Use the arrow buttons to move the business units from the **Available** list to the **Assigned** list and vice versa.
5. Click the **Save** button.

Managing Focus Codes

NOTE: *Focus codes are automatically assigned to the EPM business unit.*

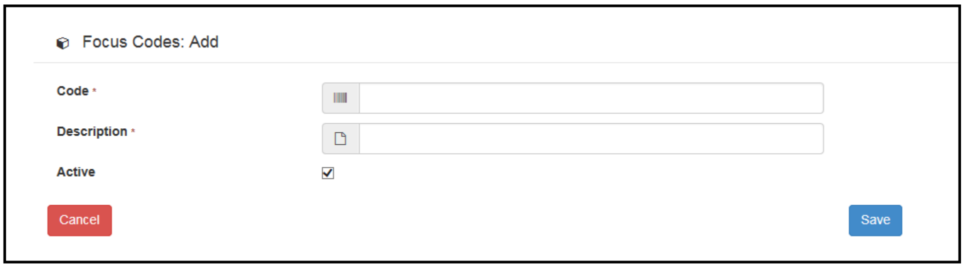
Viewing Focus Codes

1. Display a list of available user codes. For more information, see Displaying User Codes on page *40*.
2. Click the **Focus Codes** button to display a list of available focus codes.



Adding a Focus Code

1. Display a list of available focus codes. For more information, see Viewing Focus Codes on page *43*.
2. Click the **Add** button to display the **Focus Codes: Add** page.
3. Enter a **Code** and **Description**.

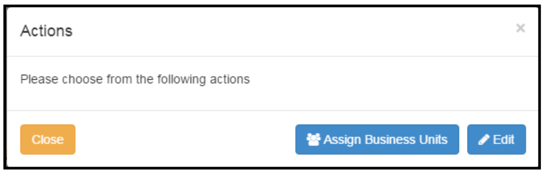


4. Click the **Save** button.

Editing a Focus Code

The **Description** and **Active** status of the focus code can be amended.

1. Display a list of available focus codes. For more information, see Viewing Focus Codes on page *43*.
2. Click the **Actions** button adjacent to the focus code that you want to edit to display the **Actions** dialog.

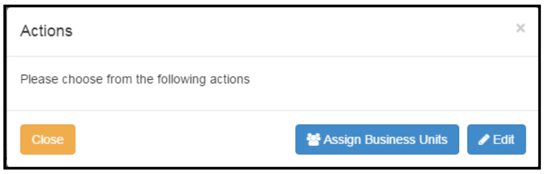


3. Click the **Edit** button to display the **Focus Codes: Edit** page.
4. Make the required changes and click the **Save** button.

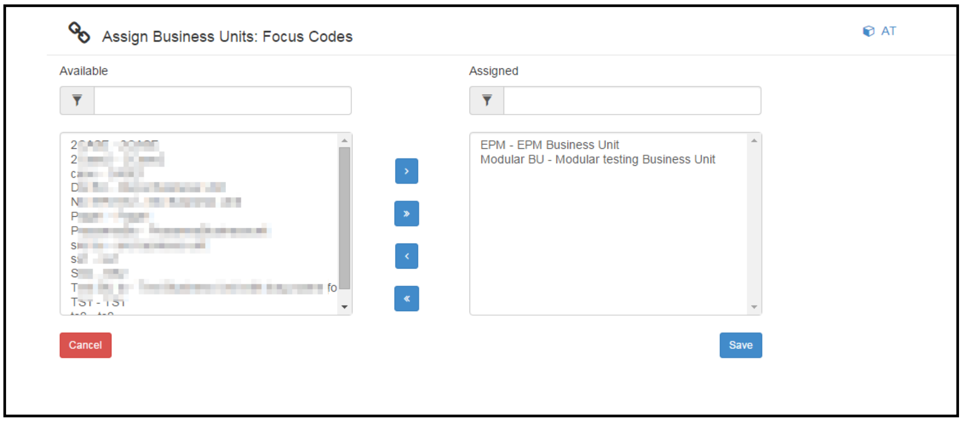
Assigning Business Units to a Focus Code

Focus codes are automatically attached to the EPM business unit. Other business units can be assigned to the focus code as follows:

1. Display a list of focus codes. For more information, see Viewing Focus Codes on page *43*.
2. Click the **Actions** button adjacent to the focus code that you want to edit to display the **Actions** dialog.



3. Click the **Assign Business Units** button to display the **Assign Business Units: Focus Codes** page. A list of **Available** business units and **Assigned** business units for the selected support type is displayed.



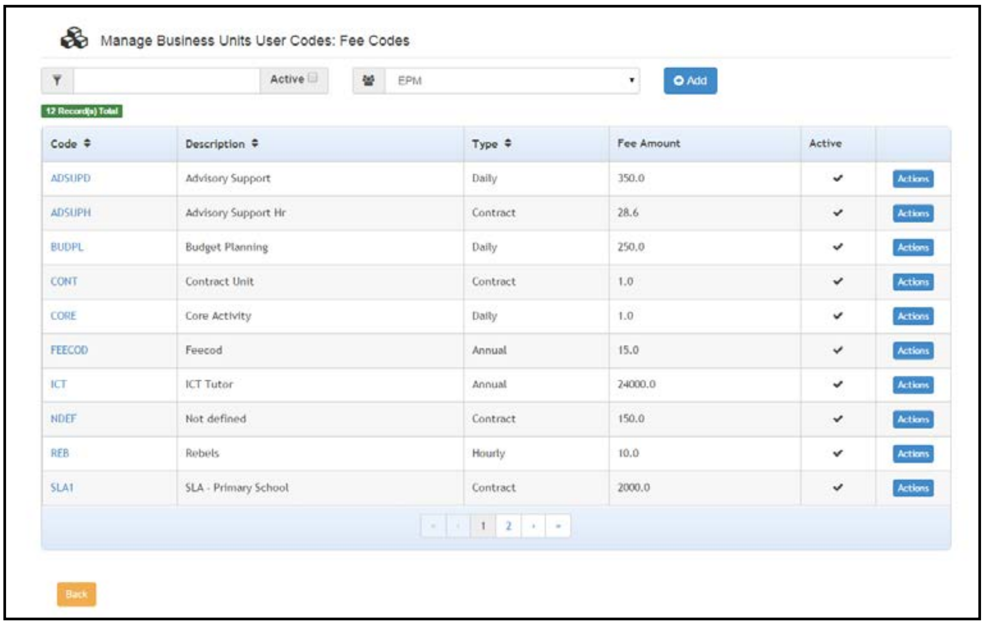
4. Use the arrow buttons to move the business units from the **Available** list to the **Assigned** list and vice versa.
5. Click the **Save** button.

Managing Fee Codes

NOTE: *Fee codes can be assigned to any business unit.*

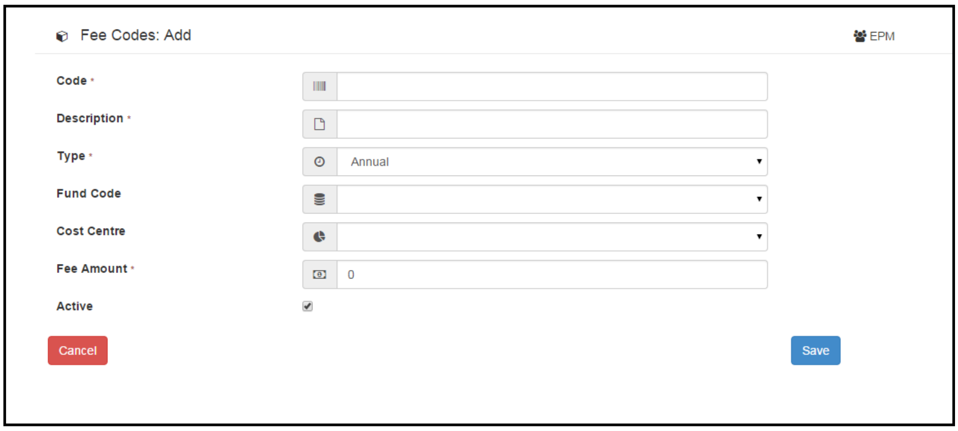
Viewing Fee Codes

1. Display a list of available user codes. For more information, see Displaying User Codes on page *40*.
2. Click the **Fee Codes** button to display a list of available fee codes.



Adding a Fee Code

1. View a list of available fee codes. For more information, see Viewing Fee Codes on page *45*.
2. Select a business unit from the drop-down.
3. Click the **Add** button to display the **Fee Codes: Add** page.



4. Enter a **Code** and **Description**.
5. Select a **Type** from the drop-down.
6. If required, select a **Fund Code**.
7. If required, select a **Cost Centre**.
8. Enter a **Fee Amount**.
9. Click the **Save** button.

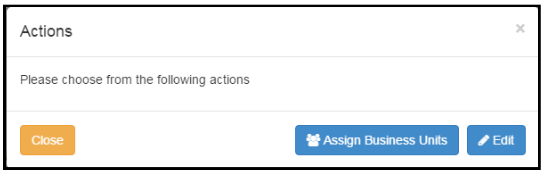
Editing a Fee Code

The **Description**, **Type**, **Fund Code**, **Cost Centre**, **Fee Amount** and **Active** status can be amended.

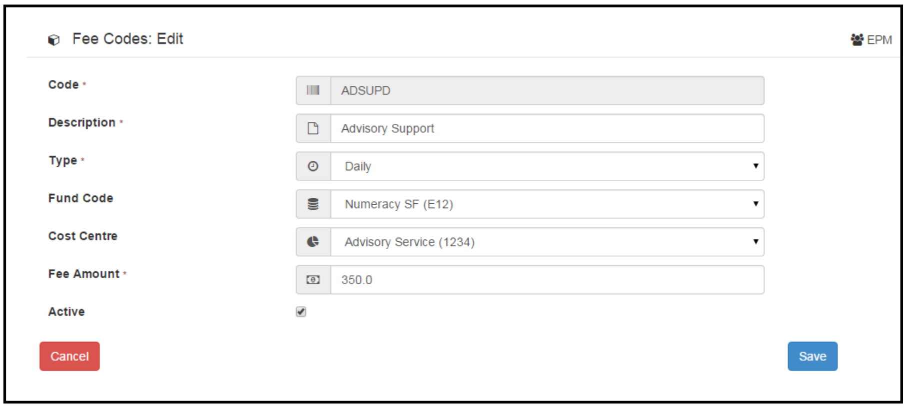
NOTE: *If a fee code is inactive, it is not displayed in the School Support area.*

1. View a list of available fee codes. For more information, see Viewing Fee Codes on page *45*.

2. Click the **Actions** button adjacent to the fee code that you want to edit to display the **Actions** dialog.



3. Click the **Edit** button to display the **Fee Codes: Edit** page.

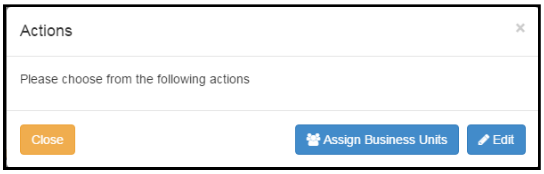


4. Make the required changes.
5. If required, deselect the **Active** check box to make the fee code inactive.
6. Click the **Save** button.

Assigning Business Units to a Fee Code

A fee code is attached to a business unit when it is added. Other business units can be assigned to the fee code as follows:

1. View a list of available fee codes. For more information, see Viewing Fee Codes on page *45*.
2. Click the **Actions** button adjacent to the fee code that you want to edit to display the **Actions** dialog.



3. Click the **Assign Business Units** button to display the **Assign Business Units: Fee Codes** page.
4. Use the arrow buttons to move the business units from the **Available** list to the **Assigned** list and vice versa.
5. Click the **Save** button.

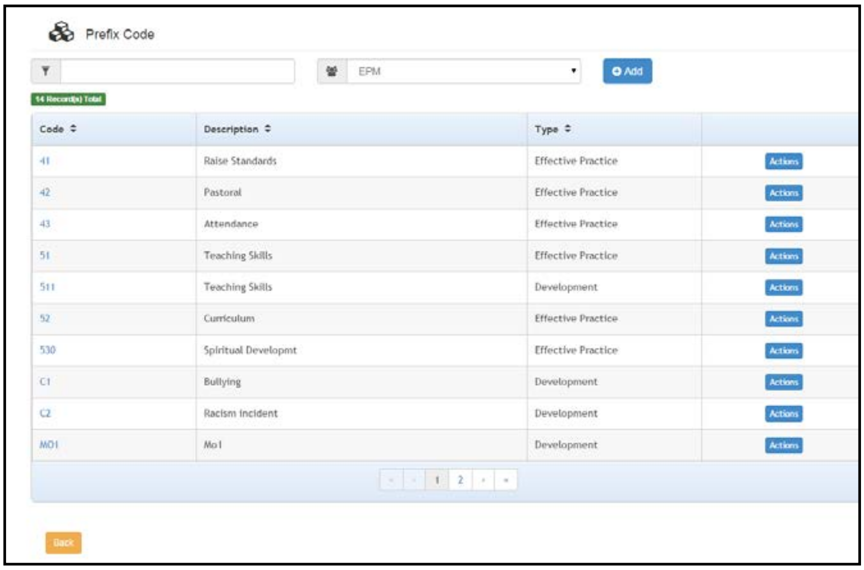
Managing Monitoring Codes

NOTE: *Monitoring codes can be assigned to any business unit.*

Viewing Monitoring Codes

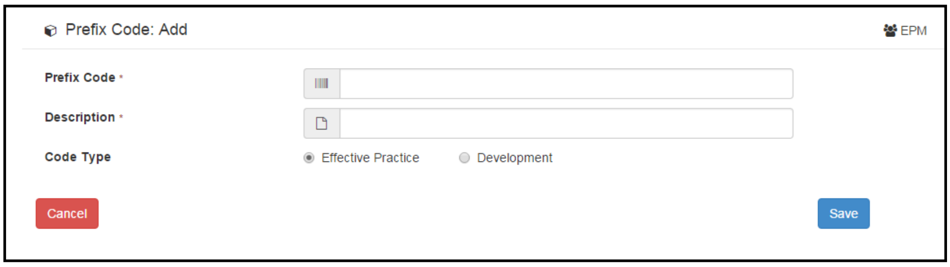
Monitoring codes are used to monitor Effective Practice or Development and consist of a **Prefix Code** and a **Description**.

1. Display a list of available user codes. For more information, see Displaying User Codes on page *40*.
2. Click the **Monitoring Codes** button to display a list of available prefix codes.



Adding a Prefix Code

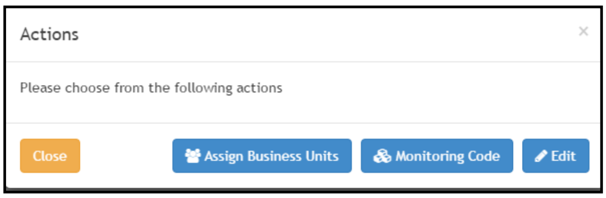
1. View a list of available prefix codes. For more information, see Viewing Monitoring Codes on page *47*.
2. Select the required business unit from the drop-down.
3. Click the **Add** button to display the **Prefix Code: Add** page.



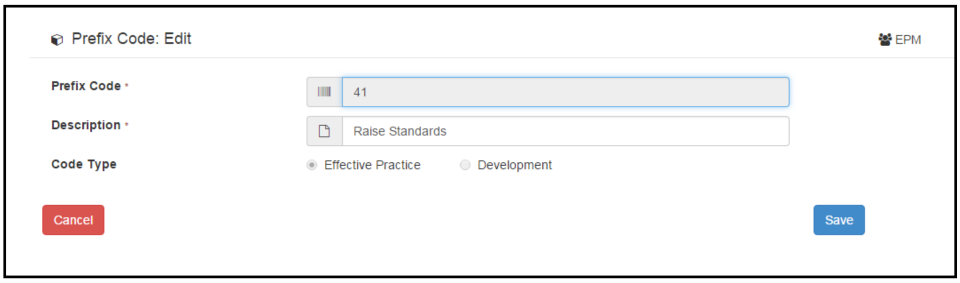
4. Enter a **Prefix Code** and **Description**.
5. Select either the **Effective Practice** or **Development** radio button.
6. Click the **Save** button.

Editing a Prefix Code

1. Display a list of available codes. For more information, see Viewing Monitoring Codes on page *47*.
2. Click the **Actions** button adjacent to the prefix code that you want to edit to display the **Actions** dialog.



3. Click the **Edit** button to display the **Prefix Code: Edit** page.

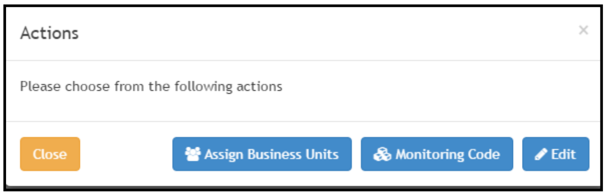


4. Make the required changes and click the **Save** button.

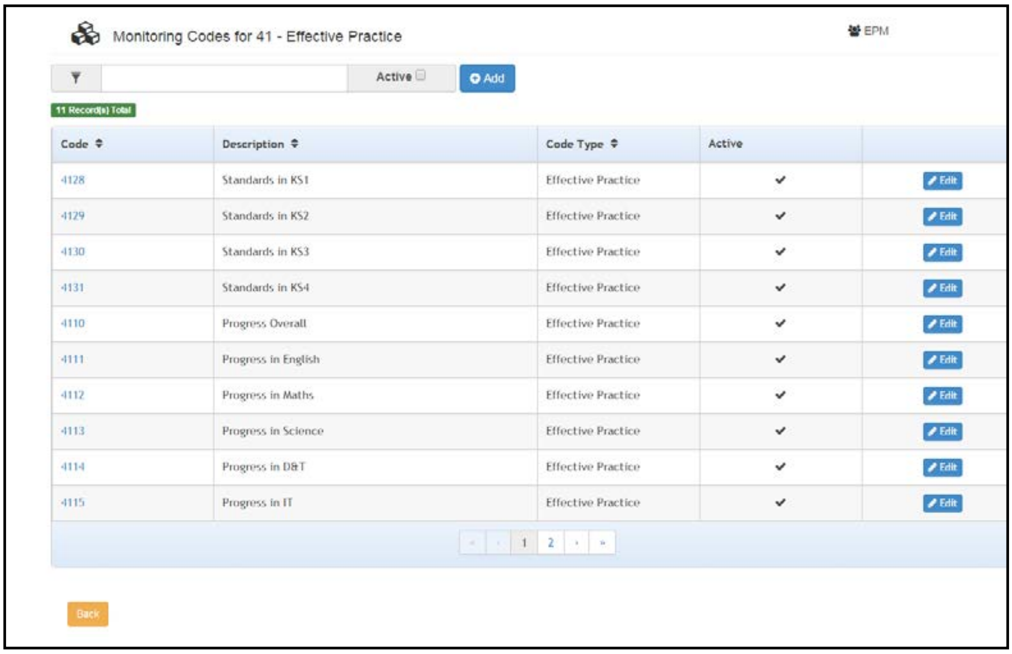
Adding a Monitoring Code

Add a new monitoring code to a prefix code as follows:

1. Display a list of available codes. For more information, see [Viewing Monitoring Codes] on page *47*.
2. Click the **Actions** button adjacent to the prefix code that you want to edit to display the **Actions** dialog.



3. Click the **Monitoring Code** button to display the list of **Monitoring Codes** for the selected **Prefix Code**.

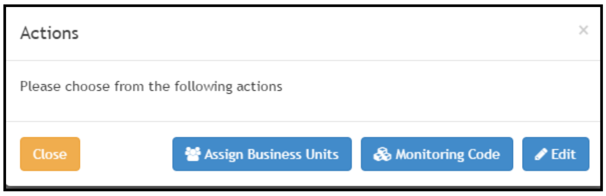


4. Click the **Add** button to display the **Monitoring Code: Add** page.
5. Enter a new **Monitoring Code** and **Description**.
6. Click the **Save** button.

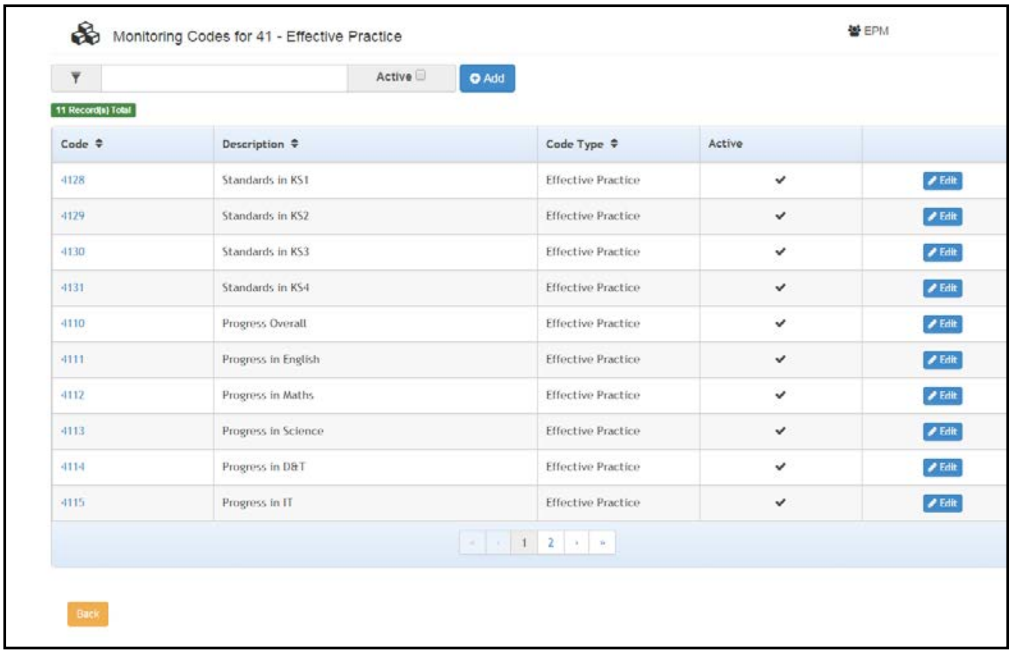
Editing a Monitoring Code

The description and active status of a monitoring code can be updated.

1. Display a list of available user codes. For more information, see [Viewing Monitoring Codes](#) on page *47*.
2. Click the **Monitoring Codes** button to display a list of available prefix codes.
3. Click the **Actions** button adjacent to the monitoring code that you want to edit to display the **Actions** dialog.



4. Click the **Monitoring Code** button to display the list of **Monitoring Codes** for the selected **Prefix Code**.



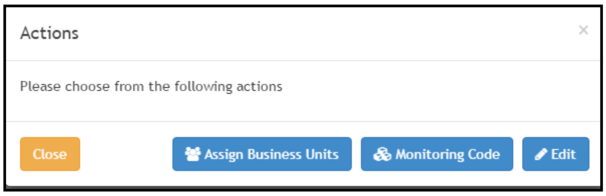
5. Click the **Edit** button to display the **Monitoring Code: Edit** page.

6. If required, update the **Description**.
7. If required, deselect the **Active** check box to make the code inactive.
8. Click the **Save** button.

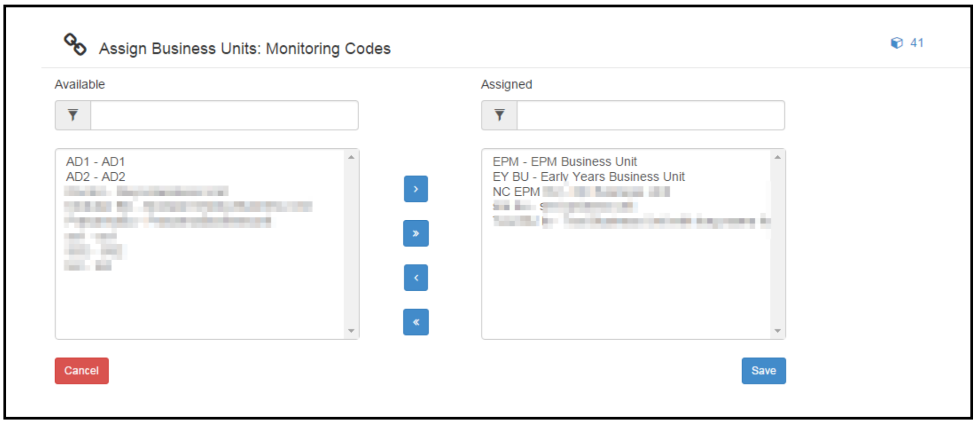
Assigning Business Units to a Monitoring Code

Monitoring codes are attached to a specific business unit when they are added. Other business units can be assigned to a monitoring code as follows:

1. Display a list of available user codes. For more information, see Viewing Monitoring Codes on page *47*.
2. Click the **Monitoring Codes** button to display a list of available prefix codes.
3. Click the **Actions** button adjacent to the monitoring code that you want to edit to display the **Actions** dialog.



4. Click the **Assign Business Units** button to display the **Assign Business Units: Monitoring Codes** page.



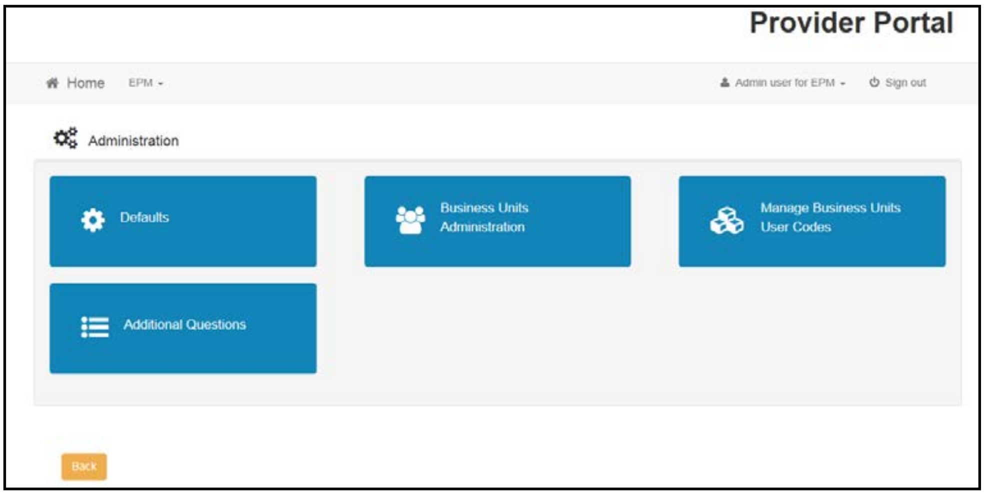
5. Use the arrows to move business units from **Available** to **Assigned**.
6. Click the **Save** button.

Setting Up Additional Questions

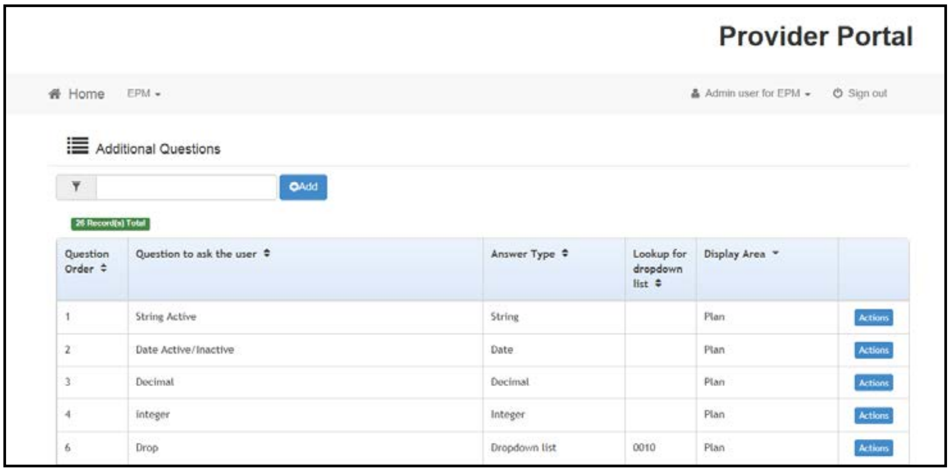
Additional questions enable user defined information to be recorded. They are not specific to a business unit, but are set up to be displayed and answered in a particular area e.g. Plan or School Support. They are set up in the Administration area.

Viewing Additional Questions

1. Click the **Administration** button on the **Welcome to EPM** home page to display the **Administration** page.



2. Click the **Additional Questions** button to display the **Additional Questions** page with a list of existing additional questions.



Adding an Additional Question

1. View the existing additional questions. For more information, see [Viewing Additional Questions](#) on page *51*.
2. Click the **Add** button to display the **Additional Questions: Add** page.

3. Select an **Answer Type** from the drop-down list.
4. Enter the **Question to ask the user**.
5. Enter the **Question Order** which determines the order in which questions are displayed.
6. Select the **Display Area** from the drop-down list of areas where additional questions can be answered.

7. Click the **Save** button.

Editing an Additional Question

The details can be updated and a question can be made inactive so that it is no longer displayed. An inactive question can be made active.

1. View the additional questions. For more information, see [Viewing Additional Questions]() on page *51*.
2. Click the **Actions** button adjacent to the question that you want to edit to display the **Actions** dialog.
3. Click the **Edit** button to display the **Additional Questions: Edit** page.

4. Edit the fields as required.
5. If required, select or de-select the **Active** check box.
6. Click the **Save** button.

Deleting an Additional Question

If an additional question is no longer required, it can be deleted along with any answers associated with it.

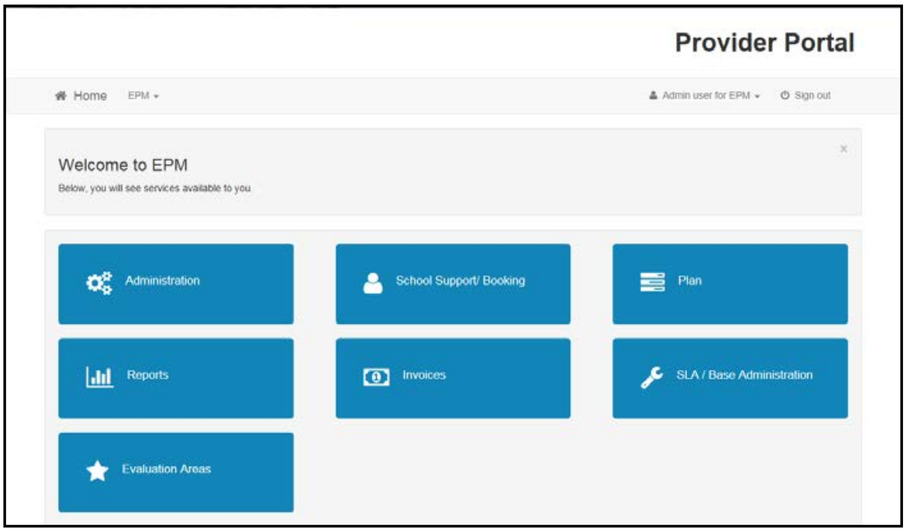
> *NOTE: Alternatively, you can make an additional question inactive so that it is no longer displayed. See [Editing an Additional Question]() on page 53.*

1. View the additional questions. For more information, see [Viewing Additional Questions]() on page *51*.
2. Click the **Actions** button adjacent to the question that you want to delete to display the **Actions** dialog.
3. Click the **Delete** button. A confirmation message is displayed.
4. Click the **Yes** button to confirm.

06 | Managing School Support

Introduction

School support is accessed via the **School Support / Booking** tile on the **Welcome to EPM** page.



Managing School Support Booking Details

Introduction

You can manage school support bookings for shared business units and those to which you have been assigned. For more information, see Assigning People to a Business Unit on page *26*.

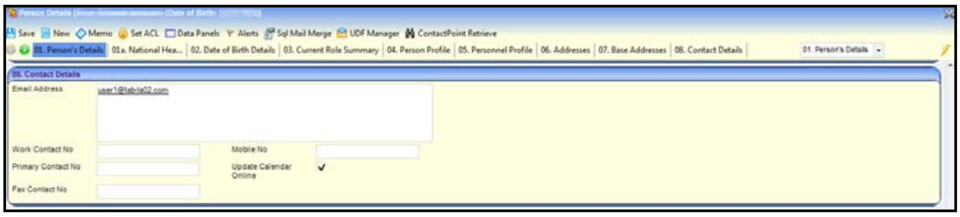
School support visits are booked and associated actions, costs and linked files are recorded.

> ***NOTE:*** *The Provider portal supports linked files of up to 4MB in the following formats: bmp, jpg, txt, doc, docx, xls, xlsx, png, pps or pdf.*

A diary facility provides integration of support recording with MS Outlook. For more information, see Managing the Diary for School Support on page *63*.

> ***NOTE:*** *All users should be mapped to either a person or a base. For more information, see Mapping a User to a Person on page 14 and Mapping a User to a Base on page 15.*

Mapping a user to a person enables appointments to be added to their Outlook calendar. The link to the appropriate calendar in Outlook is via the person's e-mail address, recorded in the v4 Client on the **Person Basic Details | Contact Details** panel.

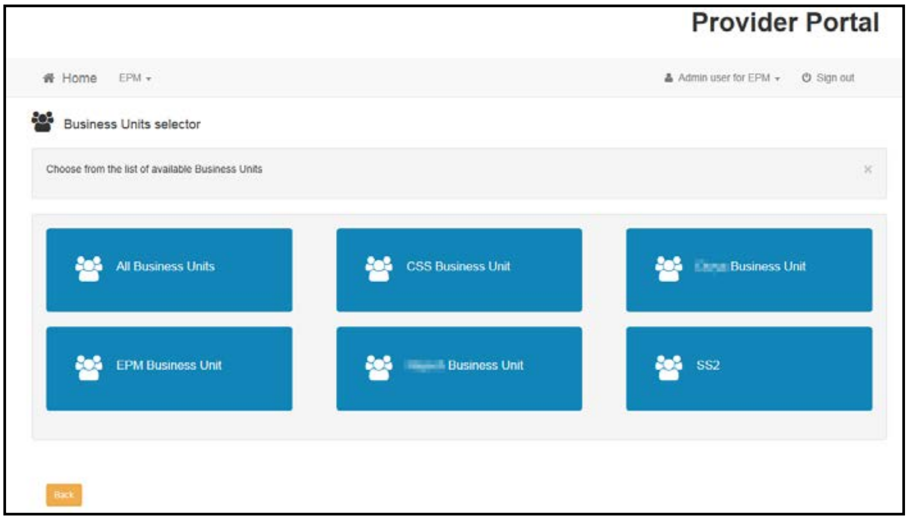


For more information, see Setting Up the Link to Outlook on page *16*.

Selecting a Business Unit for School Support

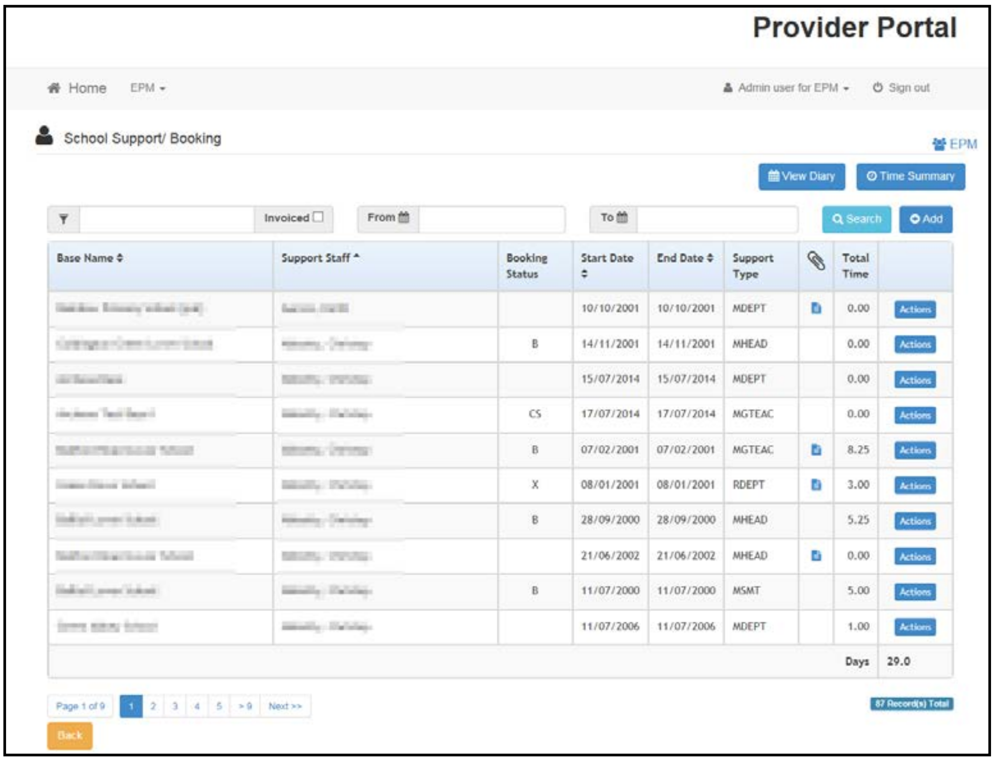
School support bookings can be managed for the business units to which you have access. For more information, see Assigning People to a Business Unit on page *26.*

1. Click the **School Support/Booking** button on the **Welcome to EPM** page to display the business units to which you have access.



2. Select the required business unit to display the **School Support/Booking** page.

NOTE: *If you select* ***All Business Units****, the information displayed is read-only.*

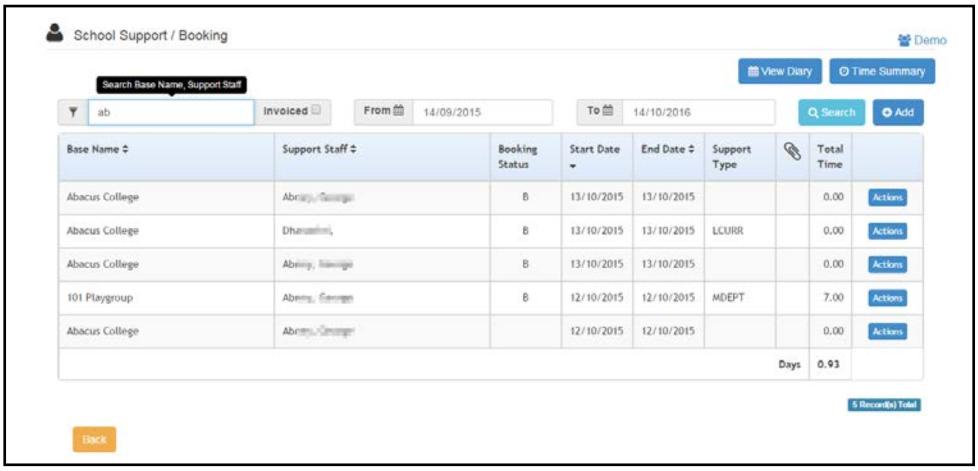


NOTE: *The selected business unit is displayed as a link on the top right-hand side of the page. To select a different business unit, click the link to display the* ***Business Unit*** *selector page.*

Viewing School Support Bookings

> ***NOTE:*** *School support bookings are displayed for all support staff unless the user is mapped to a person or a base. For more information, see Mapping a User to a Person on page 14 and Mapping a User to a Base on page 15.*

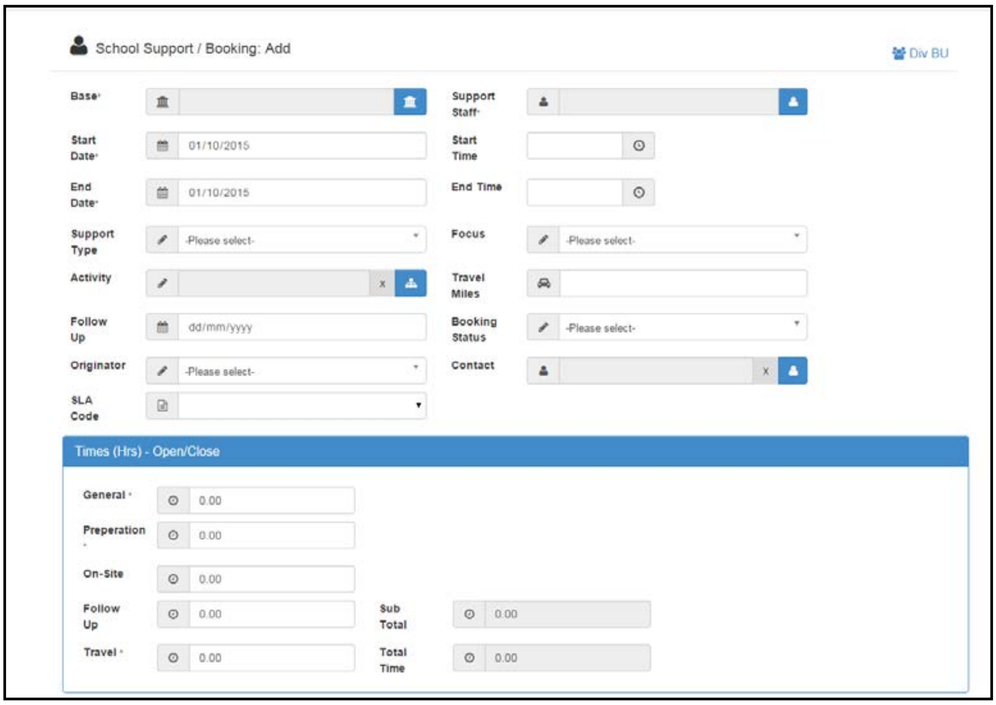
1. Select the required business unit for school support. For more information, see Selecting a Business Unit for School Support on page *56*.
2. If required, enter a full or partial **Base Name** or **Support Staff** name to filter the list.
3. Select the required **From** and **To** dates.
4. If required, select the **Invoiced** check box.
5. Click the **Search** button to display a list of matching bookings.



Adding a School Support Booking

To record the details of a new school support booking:

1. Select the required business unit. For more information, see Selecting a Business Unit for School Support on page *56*.
2. Click the **Add** button to display the **School Support/Booking:Add** page.

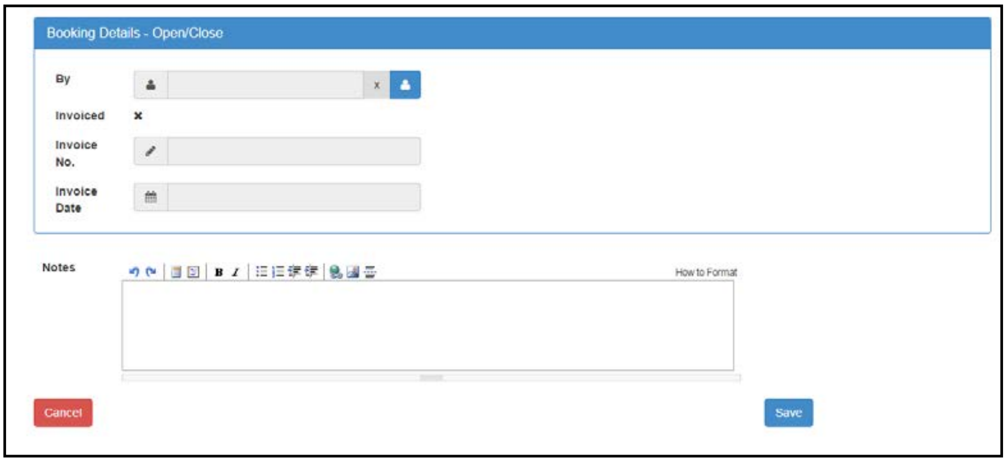


3. Click the **Base** browse button to display the **Base Search** dialog and select a base. For more information, see Selecting a Base on page *60*.
4. Click the **Support Staff** browse button to display the **Support Staff Search** dialog and select the required person. For more information, see Selecting Support Staff on page *61*.

   Start Date and **End Date** are initially set to the current date.
5. If required, select a different dates for the appointment.
6. If required, select a **Support Type** from the drop-down list of support types assigned to this business unit. For more information, see Assigning Business Units to a Support Type on page *43*.
7. If required, select a **Focus** from the drop-down list of focus codes assigned to this business unit. For more information, see Assigning Business Units to a Focus Code on page *45*.
8. If required, click the **Activity** browse button to display the **Select an Activity** dialog and select an activity. For more information, see Selecting an Activity on page *62*.
9. If required, enter **Travel Miles**.
10. If required, enter a **Follow Up** date.
11. If required, select a **Booking Status** from the drop-down list.
12. If required, select an **Originator** from the drop-down list (*Table ID: 0513*).
13. If required, click the **Contact** browse button to select a contact for this booking. For more information, see Selecting a Person on page *62*.
14. If required, select an **SLA Code** to apply to this booking. For more information, see Administering Service Level Agreements on page *93*.
15. Enter **Times (Hrs)** for the following:
    - **General**
    - **Preparation**
    - **On-Site**
    - **Follow Up**

- **Travel.**

16. Click the browse button on the **Booking Details - Open/Close** panel to display the **Support Staff Search** dialog and select a person for the booking.
17. The invoice details are automatically completed when the invoice is produced. For more information, see Producing an Invoice for School Support on page *59*.



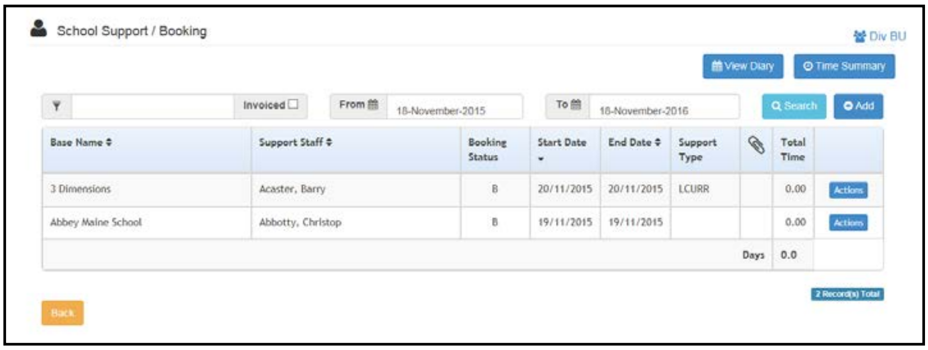
18. If required, enter **Notes**.
19. Click the **Save** button.

> ***NOTES:*** *If the person has an overlapping school support booking, a warning message is displayed.*
>
> *If the support staff member has an associated email address, a notification of this appointment is sent to them.*
>
> *The appointment is only added to their Outlook calendar if their email address is mapped to a person in the v4 Client.*
>
> *For more information, see Mapping a User to a Person on page 14.*

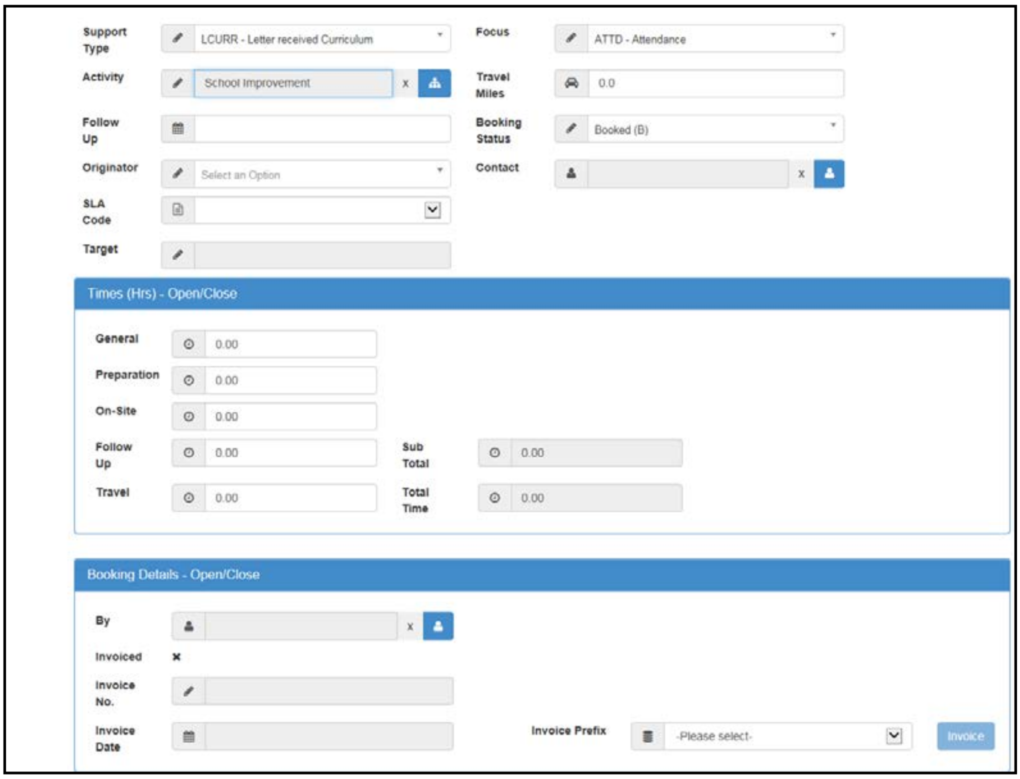
Producing an Invoice for School Support

After a school support booking has been made and costs recorded, an invoice can be produced. The booking status must be **Booked**, **Completed** or **Provisional**.

1. Select the required business unit to display the **School Support/Booking** page. For more information, see Selecting a Business Unit for School Support on page *56*.



2. Click the **Actions** button adjacent to the school support booking that you want to invoice to display the **Actions** dialog.
3. Click the **Edit** button to display the **School Support/Booking: Edit** page.

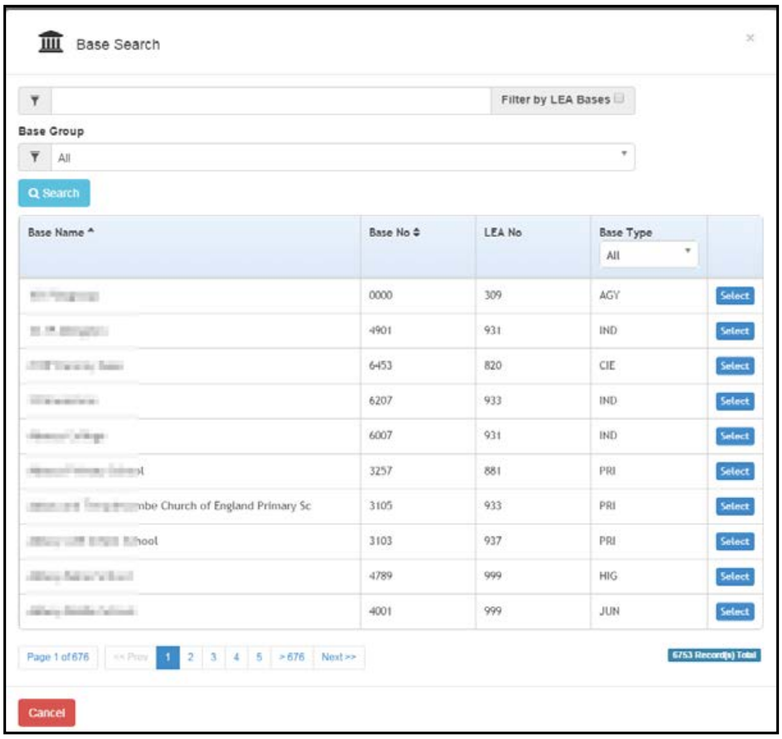


4. On the **Booking Details – Open/Close** panel, select an **Invoice Prefix** from the drop-down list (*Lookup Table ID: 0511*).
5. Click the **Invoice** button.

Selecting a Base

NOTE: *Bases cannot be added or updated via the Provider portal. This can only be done in the v4 Client.*

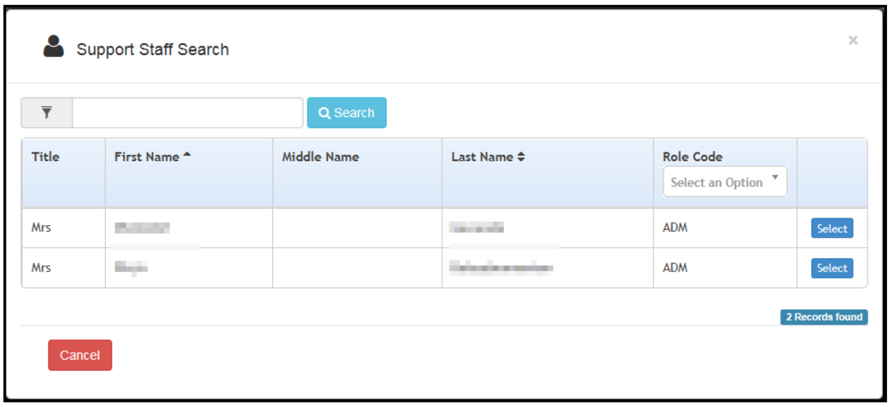
1. Click the base browse button to display the **Base Search** dialog.



2. If required, enter a full or partial **Base Name** or **Base No**.
3. If required, select the **Filter by LEA Bases** check box.
4. If required, select a **Base Group** from the drop-down list.
5. Click the **Search** button.
6. If required, select a **Base Type** from the drop-down list.
7. Click the **Select** button to select the required base.

Selecting Support Staff

1. Click the browse button to display the **Support Staff Search** dialog listing only people who are assigned to EPM roles. For more information, see Assigning a Person to an EPM Role on page *15*.



2. If required, enter a full or partial **First Name** or **Last Name** and click the **Search** button.
3. If required, select a **Role Code** from the drop-down list.
4. Click the **Select** button for the required person.

Selecting an Activity

1. Click the browse button to display the **Select an Activity** dialog.

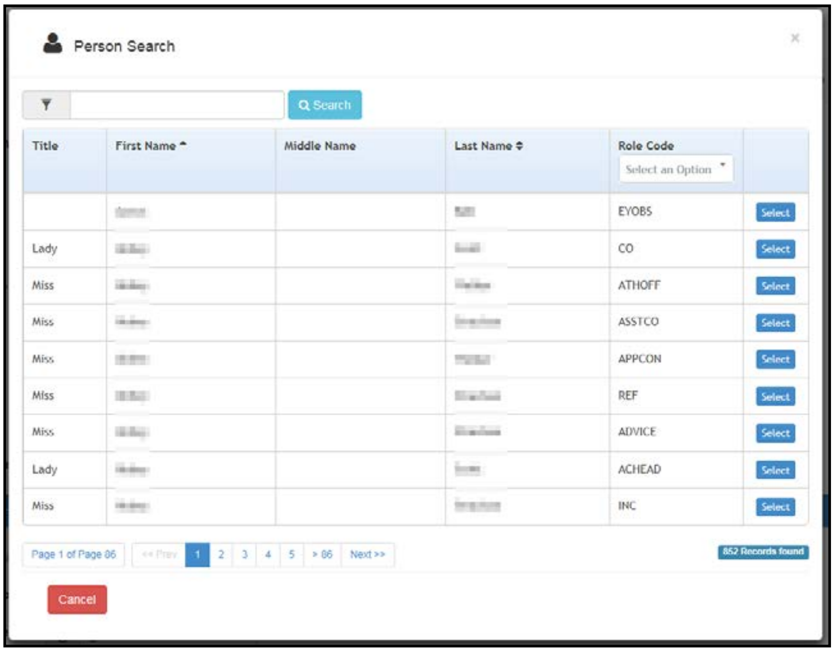
2. Highlight the required activity and click the **Select** button.

Selecting a Person

The **Person Search** dialog is used to search for any person who is assigned to a role.

> ***NOTES:*** *Records that are subject to ACL security are not displayed in the list.*
>
> *People records cannot be added or updated in the Provider portal. This can only be done in the v4 Client.*

1. Click the browse button to display the **Person Search** dialog listing all people who are assigned to a role.



2. If required, enter a full or partial **First Name** or **Last Name** and click the **Search** button.
3. If required, select a **Role Code** from the drop-down list.
4. Click the **Select** button for the required person.

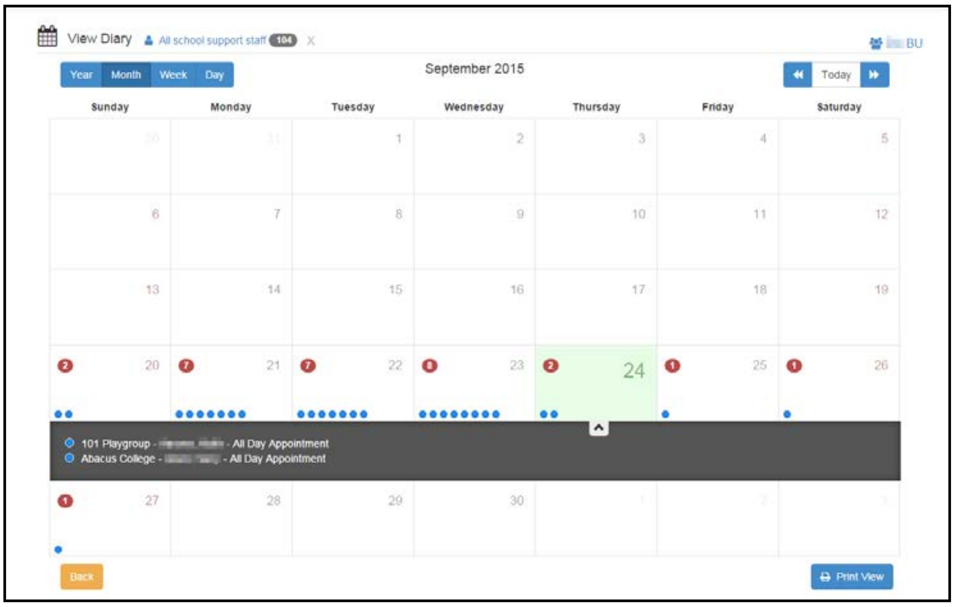
Managing the Diary for School Support

Viewing the Diary

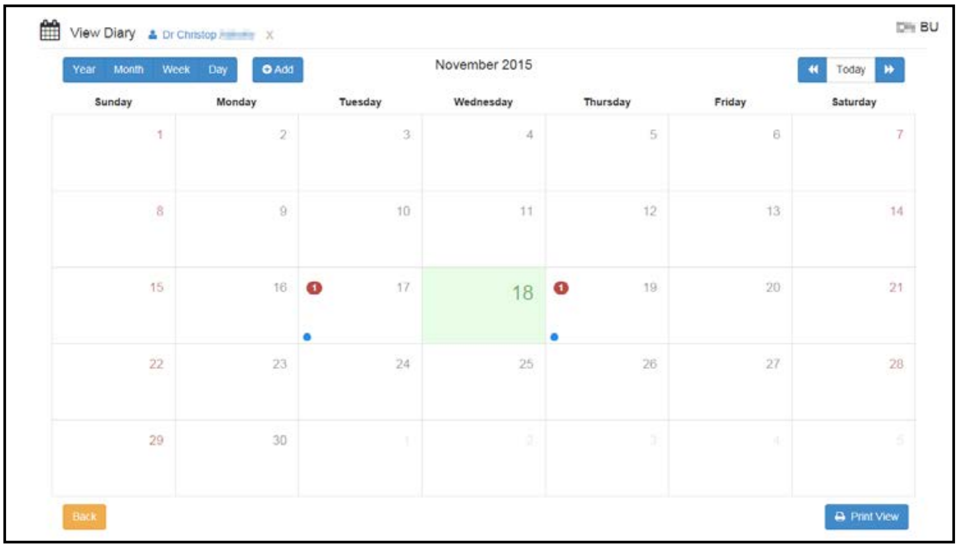
1. Select the required business unit to display the **School Support/Booking** page. For more information, see Selecting a Business Unit for School Support on page *56*.
2. Click the **View Diary** button to display the **View Diary** page showing appointments for the current month for an individual, a base or all support staff.

> ***NOTE:*** *If the user is mapped to a person, the diary for that person is displayed. If they are mapped to a base, appointments relating to the base are displayed. Otherwise, appointments for all school support staff are displayed. For more information, see Mapping a User to a Person on page 14 and Mapping a User to a Base on page 15.*

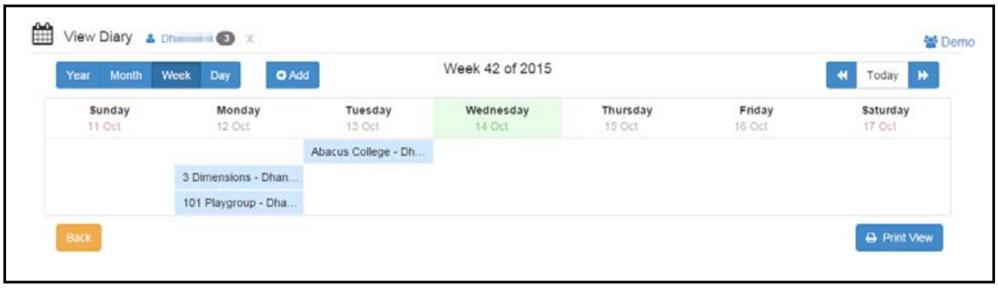
The number of appointments for each day and individual appointments for the current day are displayed. The following graphic shows appointments for **All school support staff** for the current day:



> ***NOTE:*** *If the user is mapped to a person, the name of the person is displayed as a link as shown in the following graphic.*



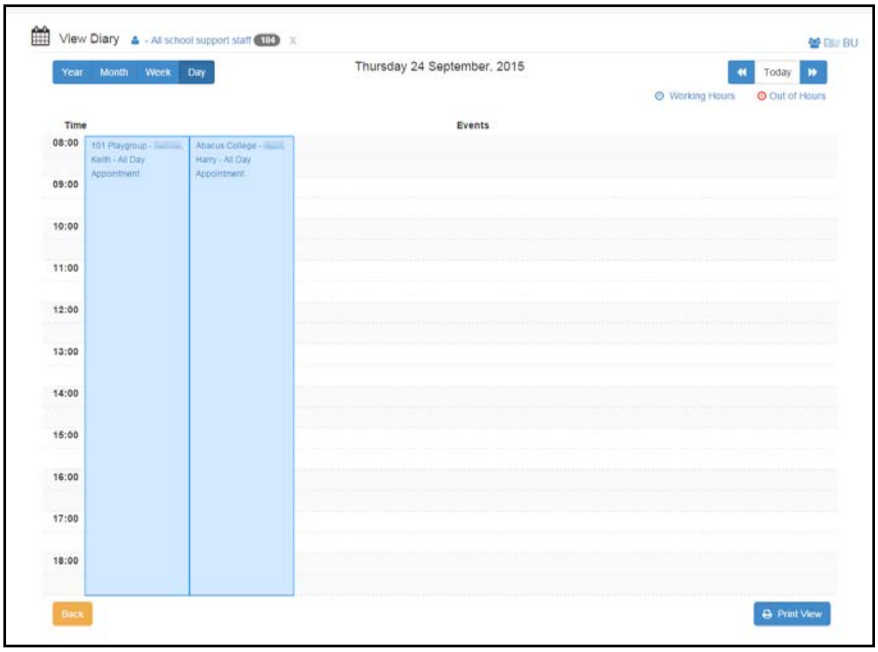
3. If required, select a different day on the displayed calendar to expand the list of appointments.
4. If required, click the **All school support staff** or name link to display the **Support Staff Search** dialog and select a support staff member. The diary for the selected person is displayed.
5. If required, click the **Year**, **Week** or **Day** button to display the diary in the appropriate view. The following graphic shows the current week's diary for an individual:



6. If required, click the forward or back arrows to display the next or previous year, month, week or day.

Viewing the Diary for a Selected Day

1. View the diary for the current month for the required support staff. For more information, see [Viewing the Diary](#) on page *63*.
2. Click the **Day** button to display the diary for the selected day.

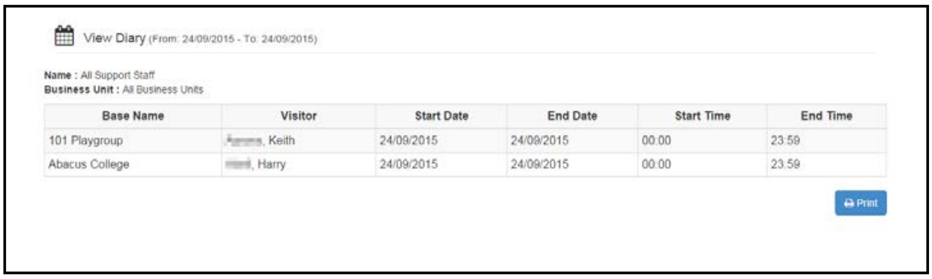


> ***NOTE:*** *The standard working hours are displayed. These standard working hours cannot be amended. If any appointments are outside of these standard times, the* ***Out of Hours*** *link is enabled and displayed in red.*

3. If required, click the **Out of Hours** link to display appointments outside of the standard working hours.

Printing the Diary

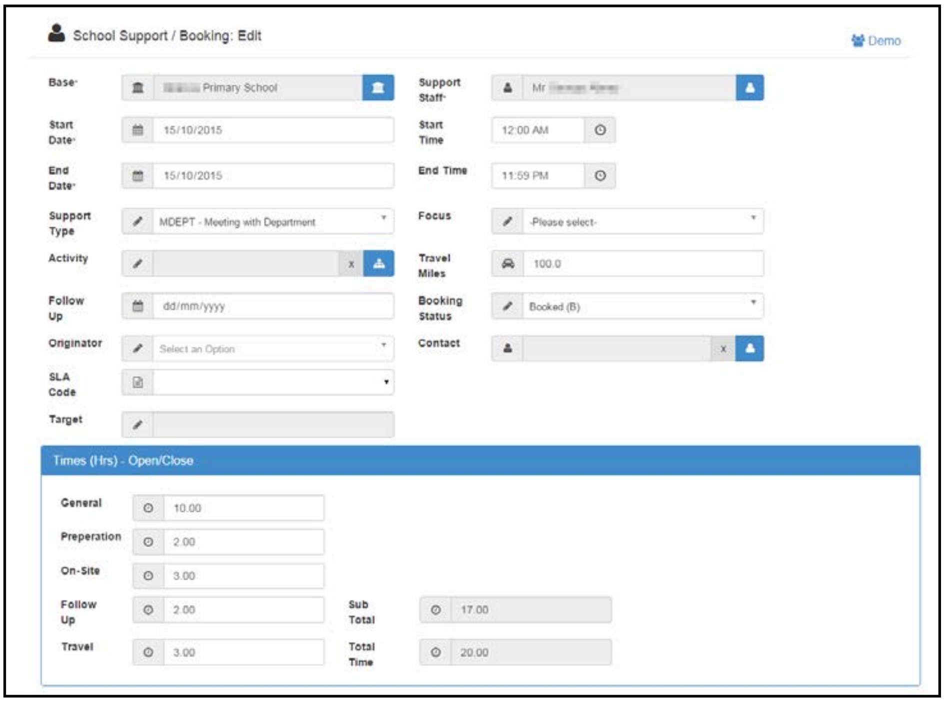
1. View the diary for the required business unit, school support staff and time period. For more information, see [Viewing the Diary](#) on page *63*.
2. Click the **Print View** button to view the report in a print view window.



3. Click the **Print** button to display the **Print** dialog and print the report.

Editing School Support and Booking Details

1. Select the required business unit to display the **School Support/Booking** page. For more information, see Selecting a Business Unit for School Support on page *56*.
2. Click the **Actions** button for the school support booking that you want to edit to display the **Actions** dialog.
3. Click the **Edit** button to display the **School Support/Booking: Edit** page.



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

> ***NOTES:*** *The target group lookup code is not included in the EPM portal. Any historic* ***Target*** *groups attached to the school support record will be shown in read-only format. Amendments can only be made via database scripts and these scripts are not provided as part of the portal delivery.*
> *The* ***Other Items*** *time which was recorded in v3 is not displayed in the EPM portal.*

Adding an Action Point

To add an action point related to the school support visit:

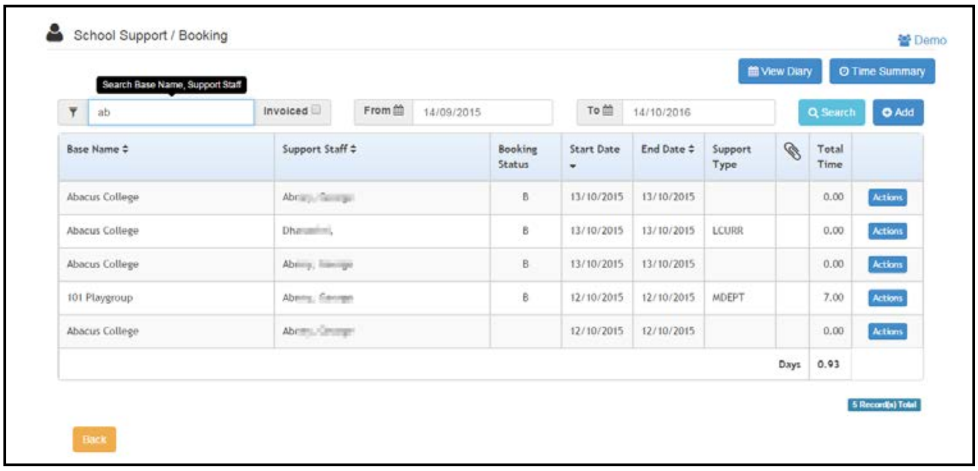
1. Select the required business unit to display the **School Support/Booking** page.
2. For more information, see Selecting a Business Unit for School Support on page *56*.

3. Click the **Actions** button adjacent to the school support booking to which you want to add an action point to display the **Actions** dialog.

4. Click the **Action Points** button to display the **Action Points** page.
5. Click the **Add** button to display the **Action Point** page.
6. Enter a **Summary**.
7. Click the **Responsibility** browse button to display the **Person Search** dialog and select the person responsible for this action. For more information, see Selecting a Person on page *62*.
8. Enter a **Due Date**.
9. Select a **Status** from the drop-down (*Table ID: 0816*).
10. If required, enter **Notes**.
11. Click the **Save** button.

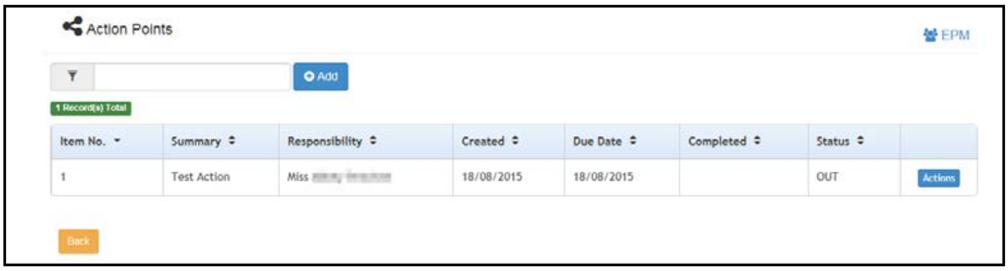
Viewing Action Points

1. Select the required business unit to display the **School Support/Booking** page. For more information, see Selecting a Business Unit for School Support on page *56*.



2. Click the **Actions** button adjacent to the school support booking to which you want to add an action point to display the **Actions** dialog.

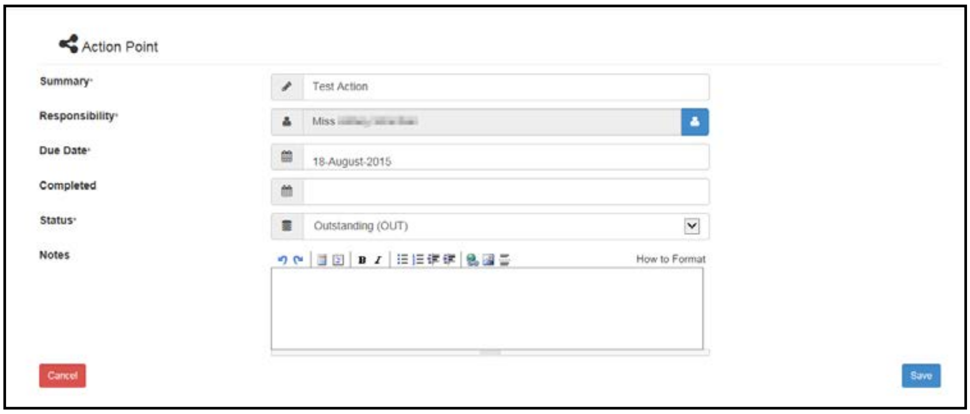
3. Click the **Action Points** button to display the **Action Points** page.



Editing an Action Point

1. Select the required action point. For more information, see Viewing Action Points on page *66*.
2. Click the **Actions** button adjacent to the action point you want to edit to display the **Actions** dialog.

3. Click the **Edit** button to display the **Action Point** page.



4. Edit the information as required.
5. Click the **Save** button.

Deleting an Action Point

1. Select the required action point. For more information, see Viewing Action Points on page *66*.
2. Click the **Actions** button adjacent to the action point you want to delete to display the **Actions** dialog.

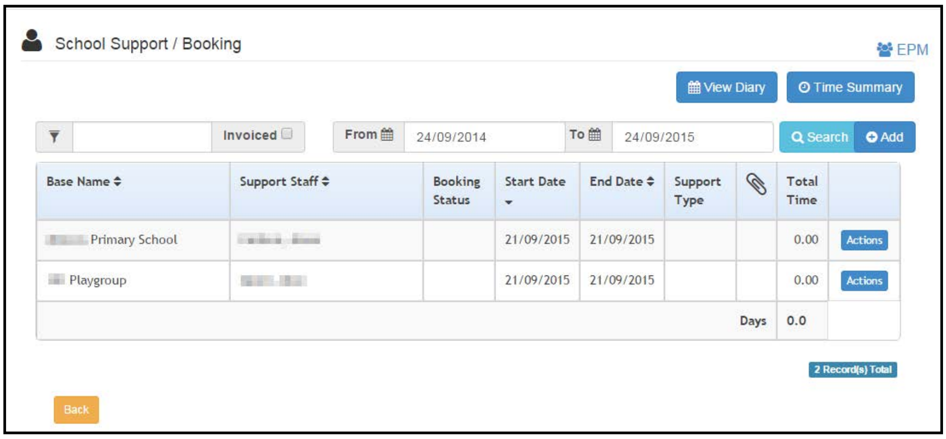
3. Click the **Delete** button to display a confirmation message:

   Are you sure you want to delete this Action Point?
4. Click the **Yes** button.

Adding Costs for School Support

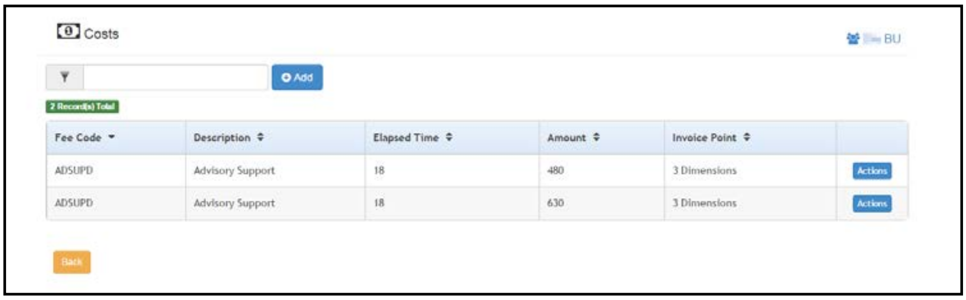
To record costs related to the school support visit:

1. Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support]() on page *56*.

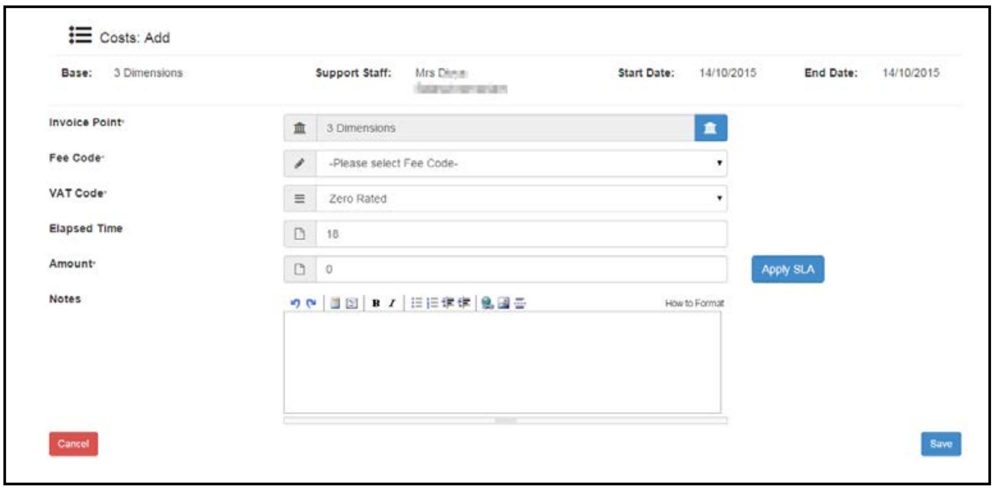


2. Click the **Actions** button adjacent to the booking to which you want to add costs to display the **Actions** dialog.

3. Click the **Costs** button to display the **Costs** page.



4. Click the **Add** button to display the **Costs: Add** page.



5. Select a **Fee Code** from the drop-down list.

6. If required, select a **VAT Code** from the drop-down list.
7. If required, enter **Elapsed Time**.

   Amount is automatically calculated based on the fee code, VAT code and elapsed time. For more information, see Calculating the Cost of Support on page *33*.

   > ***NOTE:*** *The **Apply SLA** button is enabled if an SLA is associated with this base. For more information, see Assigning a Service Level Agreement to a Base on page 93.*

8. If required, click the **Apply SLA** button to apply a Service Level Agreement associated with the invoice point.

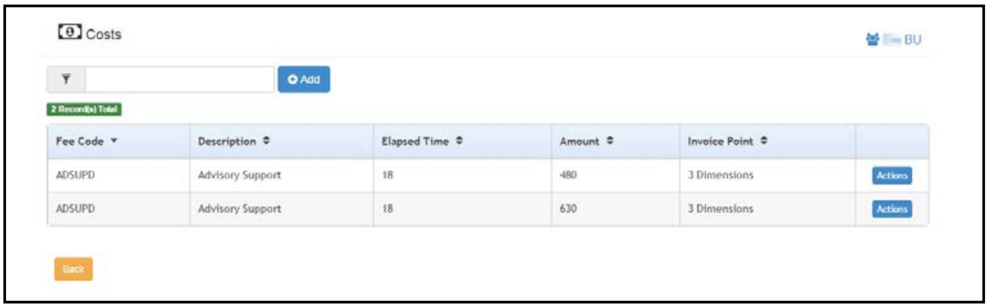
   > ***IMPORTANT NOTE:*** *An SLA may already have applied to this cost. If this is the case, the amount will already have been updated. Applying the SLA again will result in the wrong amount being calculated.*

9. If required, enter **Notes**.
10. Click the **Save** button.

Viewing Costs for School Support

1. Select the required business unit to display the **School Support/Booking** page. For more information, see Selecting a Business Unit for School Support on page *56*.
2. Click the **Actions** button adjacent to the booking for which you want to view costs to display the **Actions** dialog.

3. Click the **Costs** button to display the **Costs** page.

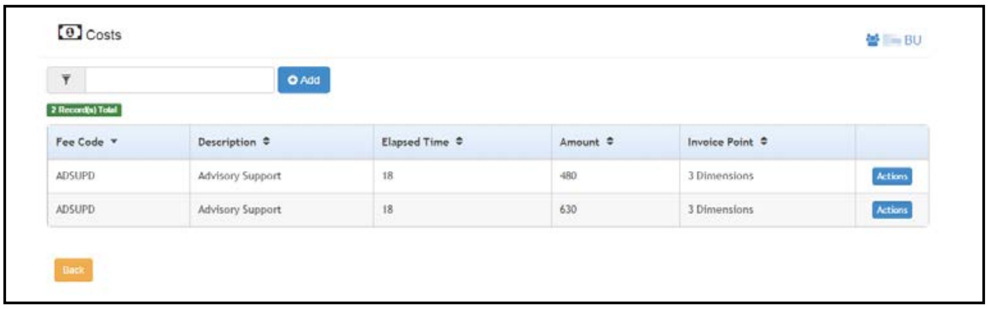


4. If required, filter the list of costs by entering a full or partial **Fee Code** or **Description**.

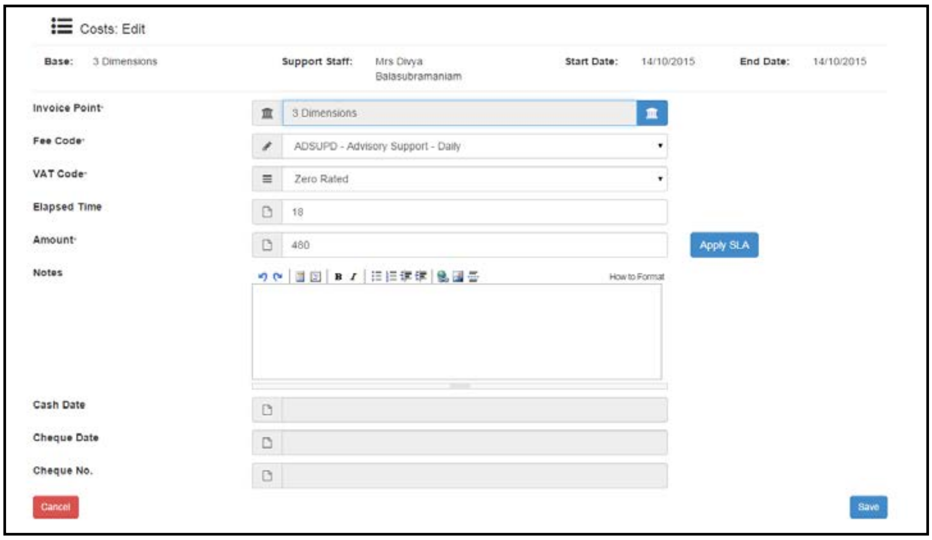
Editing Costs for School Support

Costs for school support are calculated based on the **fee code, VAT code** and **elapsed time.** If the invoice point is a base that has a Service Level Agreement (SLA) associated with it, the SLA can be applied and a new amount calculated.

1. View the costs for school support for a business unit. For more information, see Viewing Costs for School Support on page *69*.

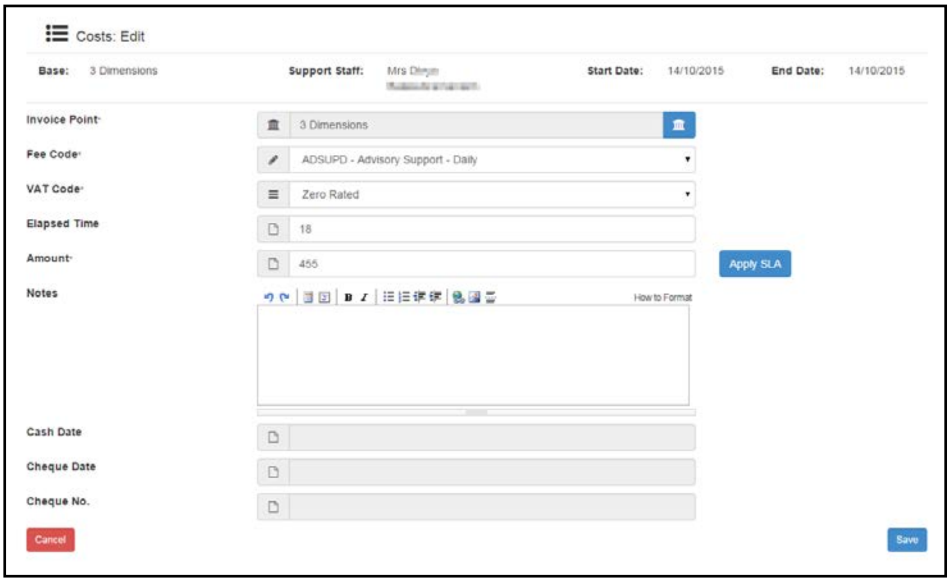


2. Click the **Actions** button adjacent to the booking for which you want to edit costs to display the **Actions** dialog.
3. Click the **Edit** button to display the **Costs: Edit** page.



__NOTE:__ The __Apply SLA__ button is enabled if an SLA has been defined for EPM and is associated with this base. For more information, see [Assigning a Service Level Agreement to a Base](#) on page 93.

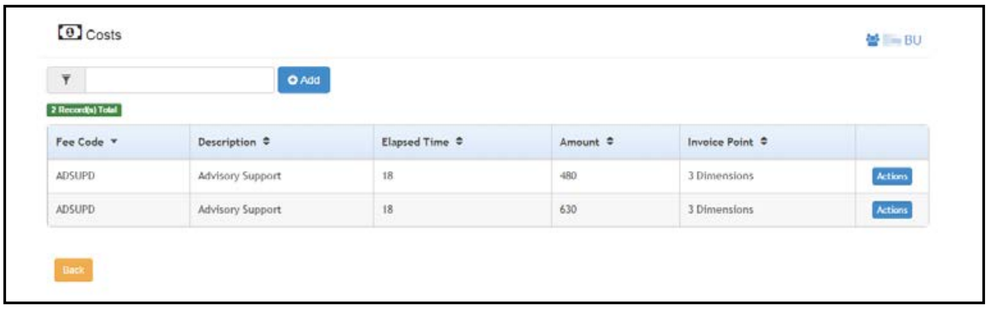
4. If required, click the **Apply SLA** button to apply the associated SLA and calculate a new amount. For example, in the following graphic the **Amount** has been reduced by the value of the SLA associated with the base:



> ***NOTES:*** *An SLA may be defined as a percentage or an absolute value. For more information, see [Defining a New SLA](#) on page 18.*
>
> *An SLA may already have been applied. If this is the case, the amount is already updated and applying the SLA again will result in the wrong amount being calculated.*

Recording Answers to Additional Questions for School Support Costs

1. View the costs for school support for a business unit. For more information, see [Viewing Costs for School Support](#) on page *69*.



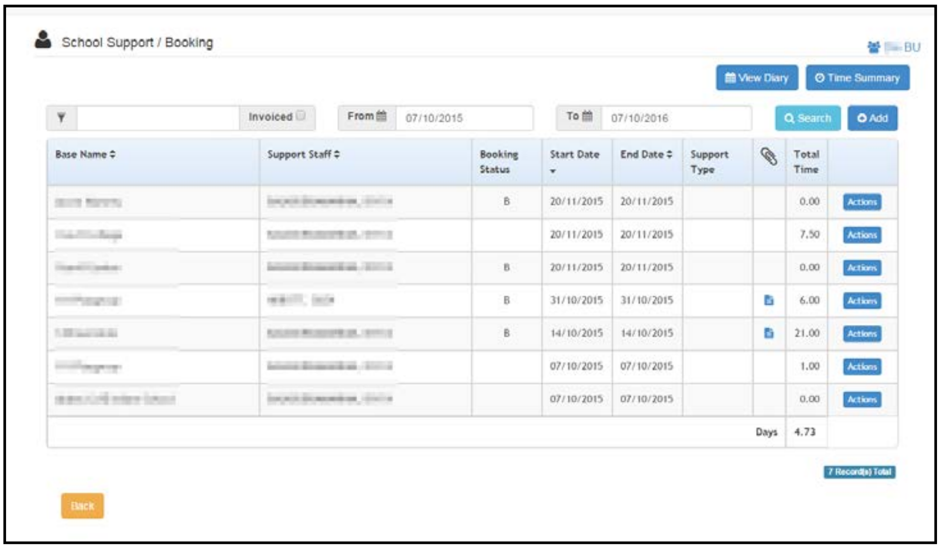
2. Click the **Actions** button adjacent to the booking for which you want to record answers to display the **Actions** dialog.
3. Click the **Additional Questions** button to display additional questions that have been set up for the **School Support Cost** area. For more information, see [Setting Up Additional Questions](#) on page *51*.
4. Enter the **required** answers.
5. Click the **Save** button.

Adding a Linked File

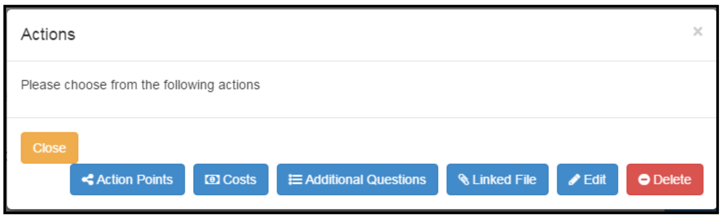
One or more files can be linked to the school support record.

> ***NOTE:*** *The Provider portal supports linked files of up to 4MB in the following formats: bmp, jpg, txt, doc, docx, xls, xlsx, png, pps or pdf.*

1. Select the required business unit to display the **School Support/Booking** page. For more information, see [Selecting a Business Unit for School Support](#) on page *56*.

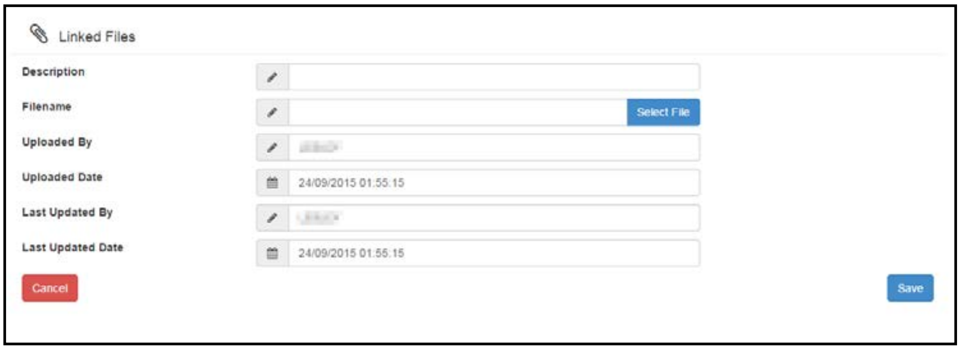


2. Click the **Actions** button adjacent to the booking for which you want to add a linked file to display the **Actions** dialog.



3. Click the **Linked File** button to display the **Linked Files** page.

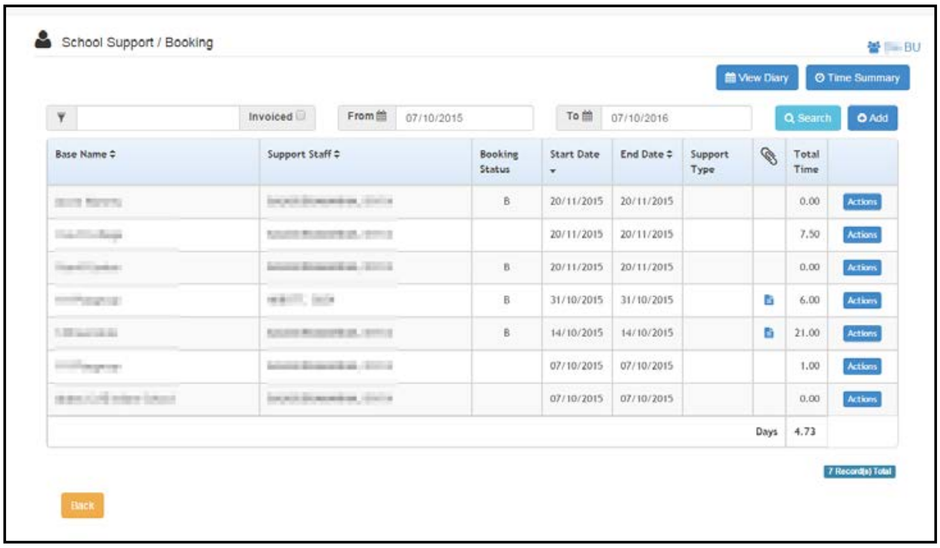
4. Click the **Add** button to display the **Linked Files** selection page.



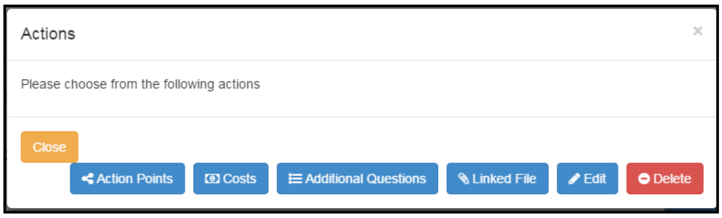
5. Enter a **Description**.
6. Click the **Select File** button and select the required file.
7. Click the **Save** button.

Removing a Linked File

1. Select the required business unit to display the **School Support/Booking** page. For more information, see Selecting a Business Unit for School Support on page *56*.

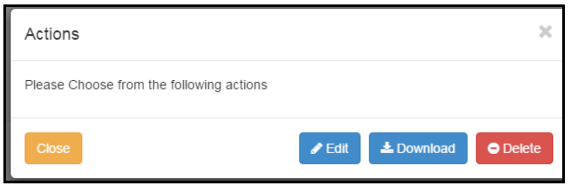


2. Click the **Actions** button adjacent to the booking for which you want to remove a linked file to display the **Actions** dialog.



3. Click the **Linked File** button to display the **Linked Files** page.

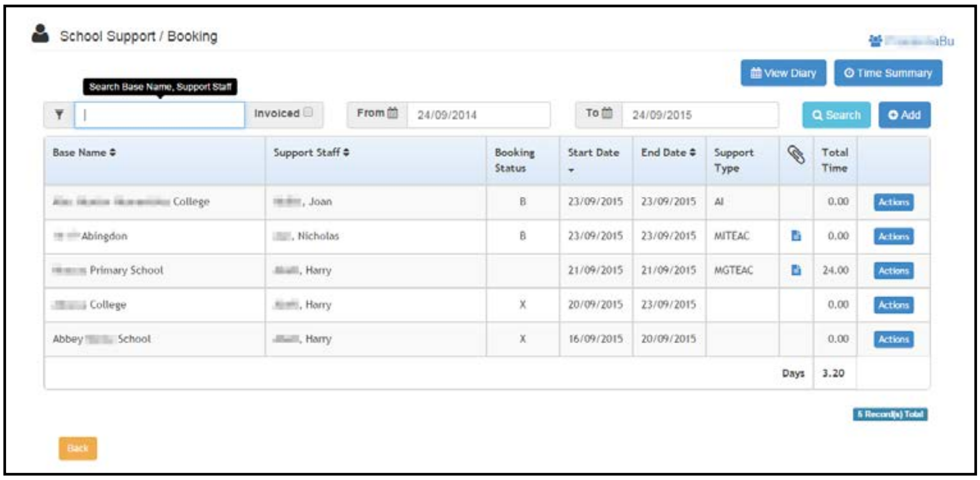
4. Click the **Actions** button adjacent to the linked file that you want to remove to display the **Actions** dialog.



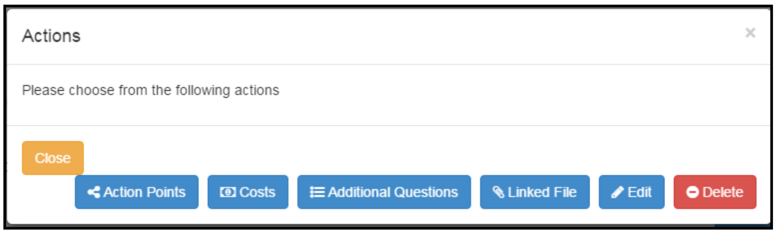
5. Click the **Delete** button. A confirmation message is displayed.
6. Click the **Yes** button.

Recording Answers to Additional Questions for School Support

1. Select the required business unit to display the **School Support/Booking** page. For more information, see Selecting a Business Unit for School Support on page *56*.



2. Click the **Actions** button adjacent to the booking for which you want to record answers to display the **Actions** dialog.



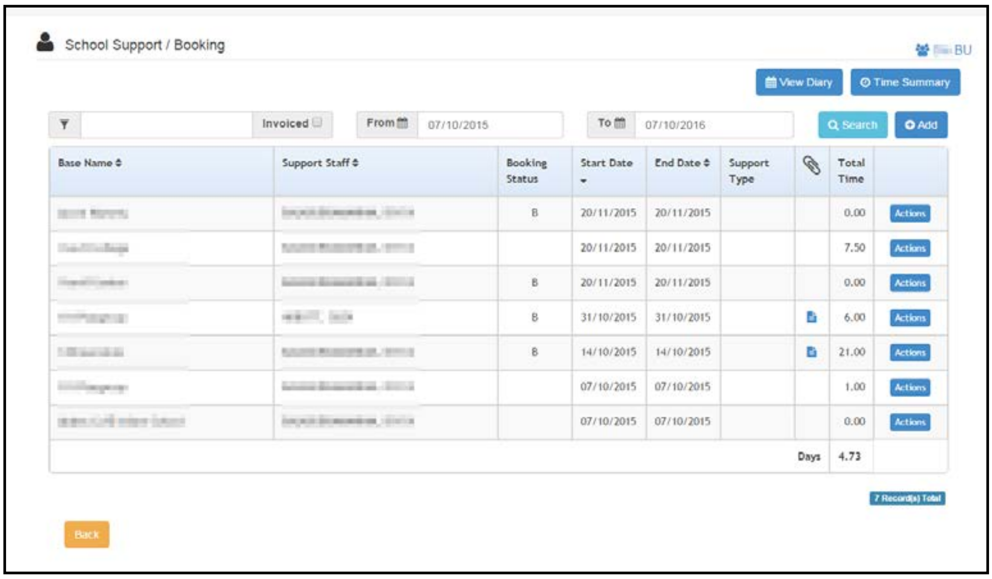
3. Click the **Additional Questions** button to display additional questions that have been set up for the School Support area. For more information, see Setting Up Additional Questions on page *51*.
4. Enter the required answers.
5. Click the **Save** button.

Viewing the Time Summary

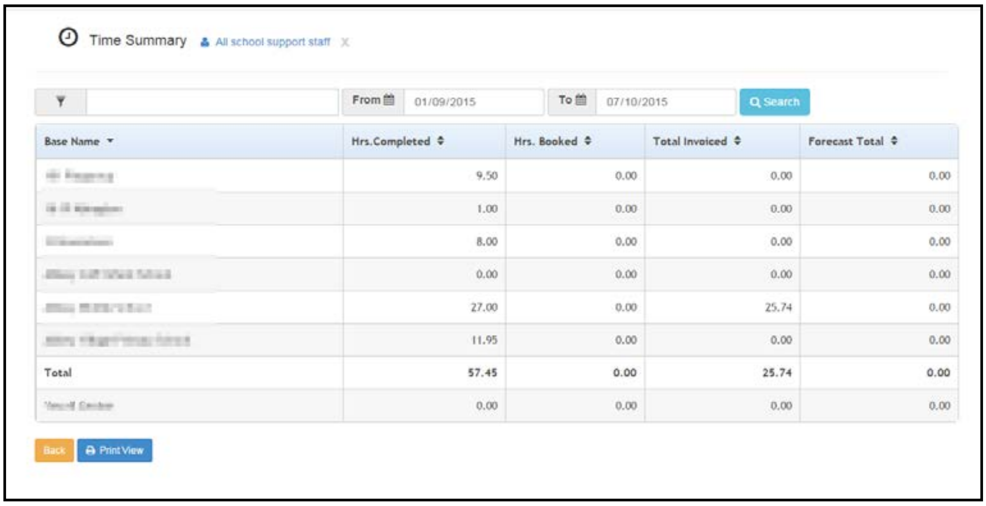
A summary of the time spent at each base can be viewed and printed. The list can be filtered using base name.

NOTE: *The time spent in hours is converted into days before being displayed.*

1. Select the required business unit to display the **School Support/Booking** page. For more information, see Selecting a Business Unit for School Support on page *56*.



2. Click the **Time Summary** button to display the **Time Summary** page. The date range is initially set to display the previous month, but can be changed.

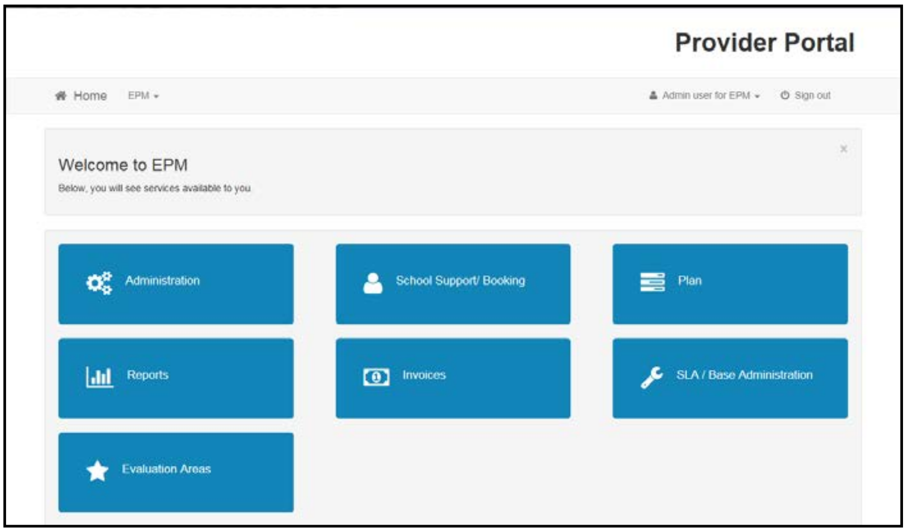


3. If required, click the **All school support staff** link to display the **Support Staff Search** dialog and select a staff member.
4. If required, click the **Print View** button to display the **Time Summary** in print view.

07 | Managing a Plan

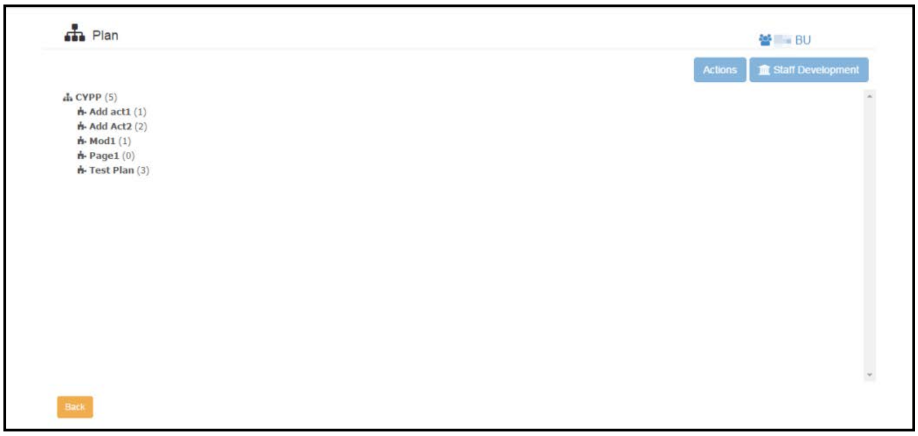
Introduction

School support visits are booked and associated actions, costs and linked files are recorded in the Plan area. This is accessed via the **Plan** tile on the **Welcome to EPM** page.



Selecting a Plan

1. Click the **Plan** button on the **Welcome to EPM** page to display the **Business Units selector** page.
2. Select the required business unit to display the **Plan** page. The plan is displayed as a tree structure, as shown in the following graphic:



NOTE: *If you select* ***All Business Units****, the data displayed is read-only.*

Adding an Activity to a Plan

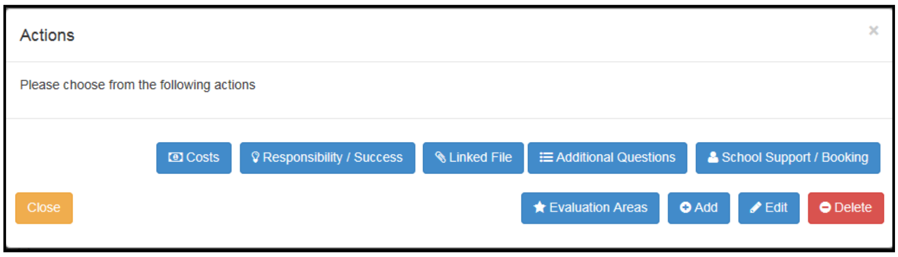
An activity can be a project, target or task.

To add an activity to a plan:

1. Select a plan. For more information, see Selecting a Plan on page *77*.

2. Select the required area of the plan.

3. Click the **Actions** button to display the **Actions** dialog.



4. Click the **Add** button to display the **Add** page.

5. Select an Activity **Type** from the drop-down list.
6. Enter a **Name**.
7. If required, click the browse button to display the **Support Staff Search** and select a **Manager**.

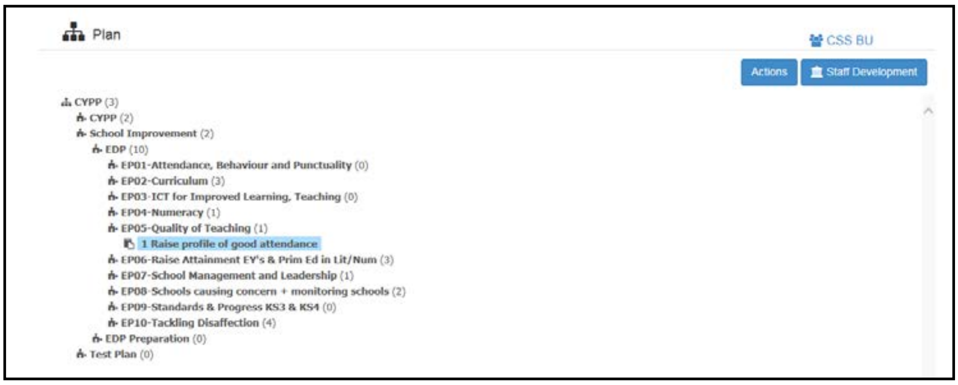
8. If required, select a **Status** from the drop-down list.
9. If the activity **Type** is **Project**, you can select a **National Priority** from the drop-down list (*Lookup Table ID: 0501*).

10. If required, enter the following information about the activity:
    - A **Short Code**.
    - The number of **Days**.
    - The **Date Proposed**.
    - **Estimated Start** and **End** dates.
    - **Must End By** date.
    - **Actual Start** date.
    - **Actual End** date.
    - **Notes**.
11. Click the **Save** button.

Adding a Cost to an Activity

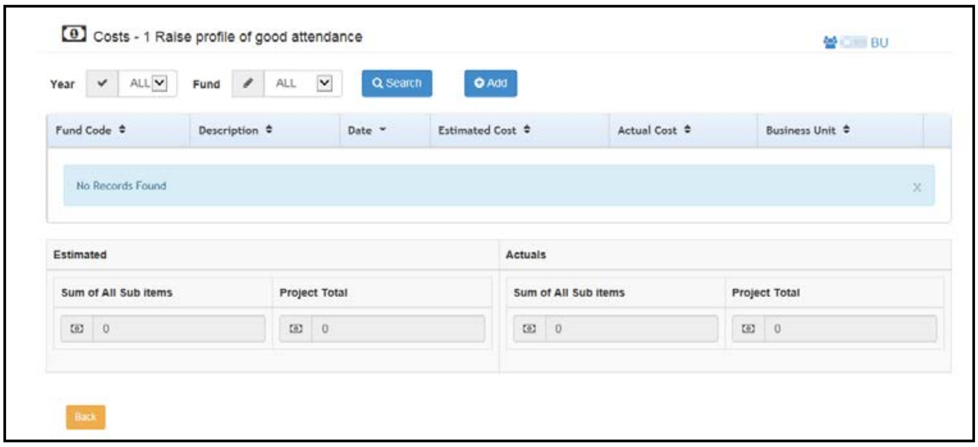
To attach a cost to an activity:

1. Select a plan. For more information, see Selecting a Plan on page *77* .
2. Select the required area of the plan.

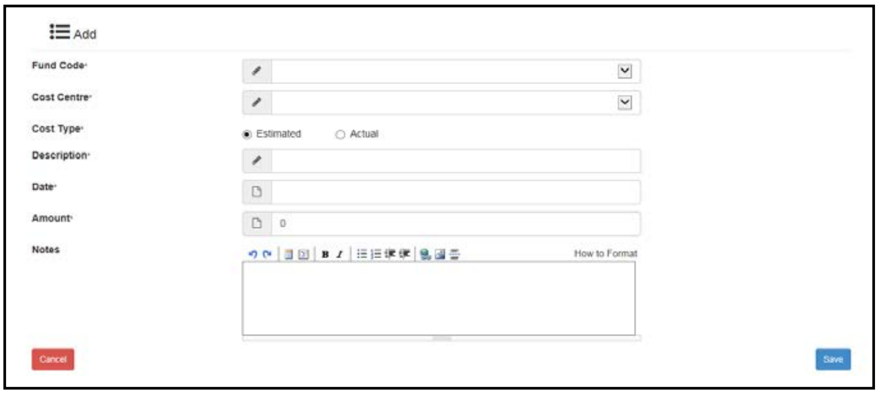


3. Click the **Actions** button to display the **Actions** dialog.

4. Click the **Costs** button to display the **Costs** page.



5. Click the **Add** button to display the **Add** page.



6. Select a **Fund Code** from the drop-down list.
7. Select a **Cost Centre** from the drop-down list (*Lookup Table ID: 0503*).
8. Select a **Cost Type** radio button.
9. Enter a **Description**.
10. Enter a **Date**.
11. Enter an **Amount**.
12. If required, enter **Notes**.
13. Click the **Save** button.

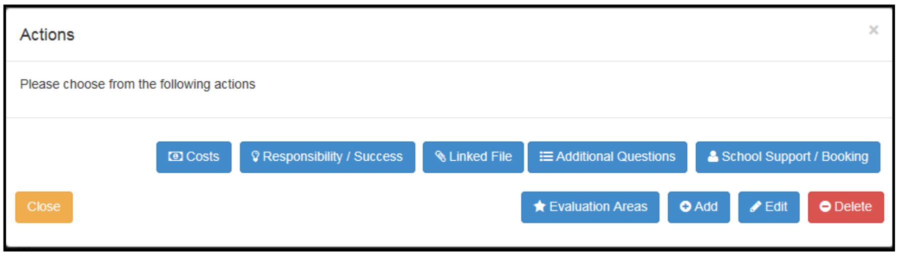
Adding a Linked File to the Plan

One or more files can be linked to the plan.

> ***NOTE:*** *The Provider portal supports linked files of up to 4MB in the following formats: bmp, jpg, txt, doc, docx, xls, xlsx, png, pps or pdf.*

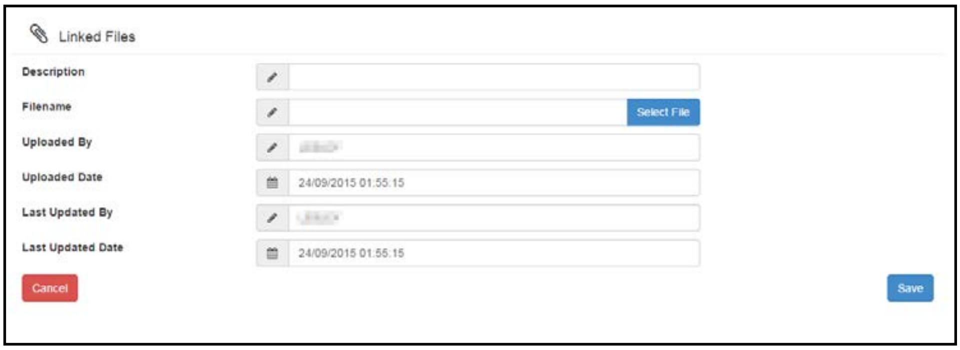
1. Select a plan. For more information, see Selecting a Plan on page *77* .
2. Select the required area of the plan.

3. Click the **Actions** button to display the **Actions** dialog.



4. Click the **Linked File** button to display the **Linked Files** page.

5. Click the **Add** button to display the **Linked Files** selection page.

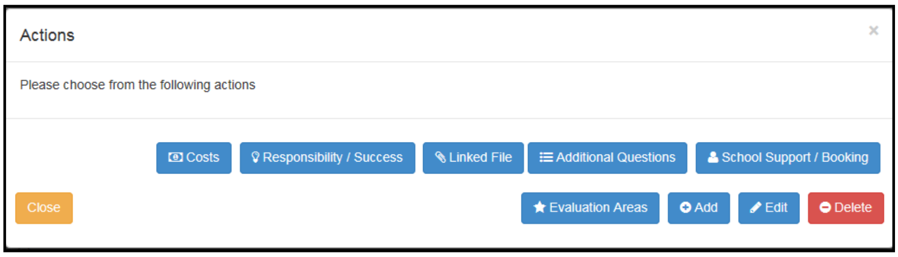


6. Enter a **Description**.
7. Click the **Select File** button and select the required file.
8. Click the **Save** button.

Recording Answers to Additional Questions for a Plan

1. Select a plan. For more information, see [Selecting a Plan](#) on page *77*.
2. Select the required area of the plan.

3. Click the **Actions** button to display the **Actions** dialog.

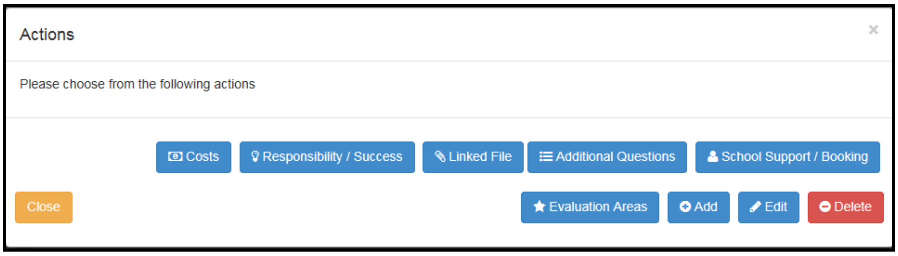


4. Click the **Additional Questions** button to display additional questions that have been set up for the Plan area. For more information, see Setting Up Additional Questions on page *51*.
5. Enter the required answers.
6. Click the **Save** button.

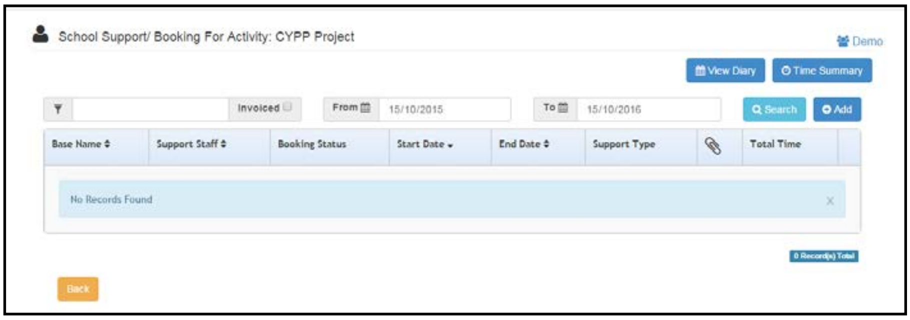
Recording School Support for a Plan

1. Select a plan. For more information, see Selecting a Plan on page *77*.
2. Select the required area of the plan.

3. Click the **Actions** button to display the **Actions** dialog.



4. Click the **School Support / Booking** button to display the **School Support/Booking For Activity** page.



5. Click the **Add** button to display the **School Support/Booking Add** page and record a new booking. For more information, see Adding a School Support Booking on page 57.

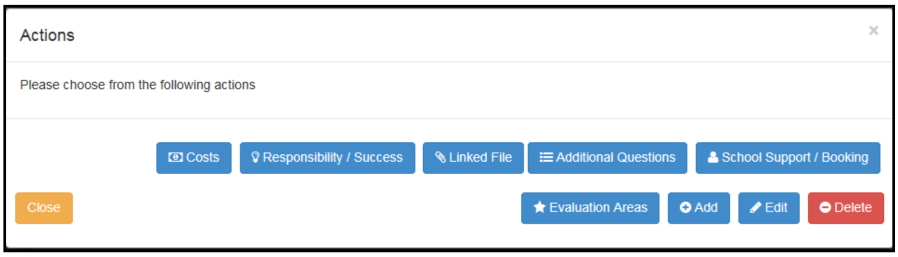
Recording Responsibility and Success

Details of outcomes of projects and activities and those responsible can be recorded against the plan.

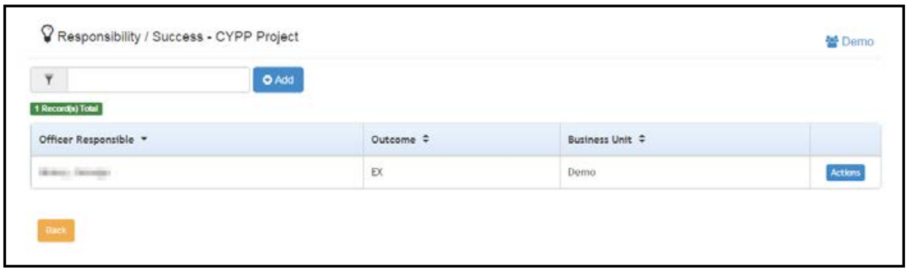
1. Select a plan. For more information, see Selecting a Plan on page *77* .

2. Select the required area of the plan.

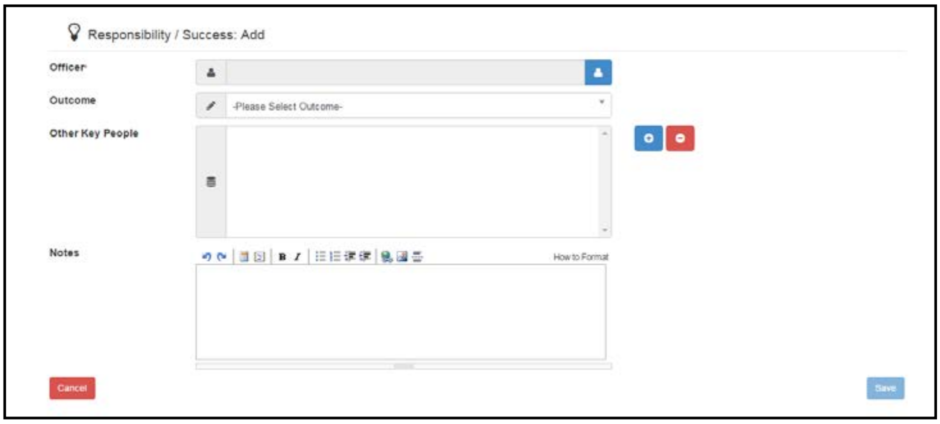
3. Click the **Actions** button to display the **Actions** dialog.



4. Click the **Responsibility/Success** button to display the **Responsibility/Success** page.



5. Click the **Add** button to display the **Responsibility/Success: Add** page.



6. Click the browse button to display the **Support Staff Search** dialog and select an **Officer**.
7. If required, select an **Outcome** from the drop-down list (*Lookup Table ID: 0504*).
8. If required, click the add button to display the **Support Staff Search** dialog and select **Other Key People**.
9. If required, enter **Notes**.
10. Click the **Save** button.

Displaying Staff Development Linked to a Plan

To display staff training that has been provided in relation to a plan:

> ***NOTE:*** *The training courses displayed are those recorded via v4 Training Manager. Courses recorded via v3 Training Manager are not displayed.*

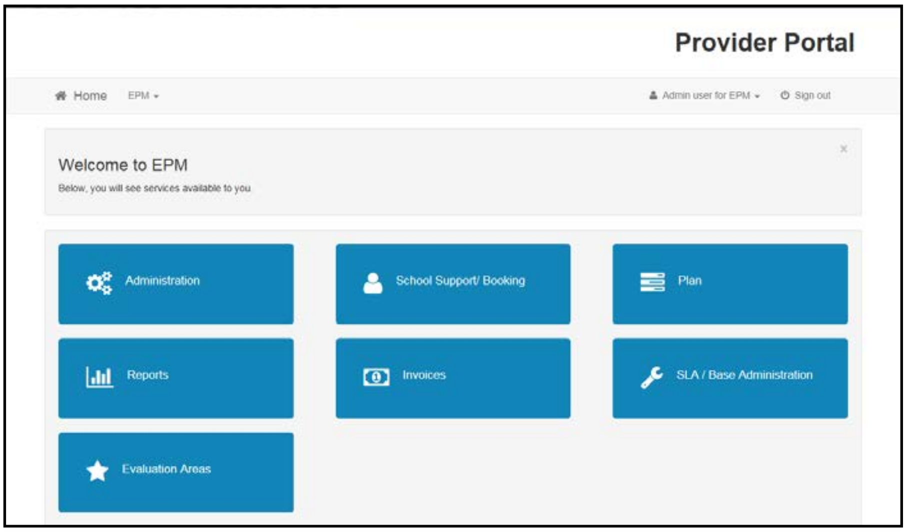
1. Select a plan. For more information, see Selecting a Plan on page *77*.
2. Select the required activity.

3. Click the **Staff Development** button to display the **Staff Development** page.

08 | Managing Reports

Introduction

The Report Manager enables you to run and manage EPM reports. It is accessed via the **Reports** tile on the **Welcome to EPM** page.



Standard reports are provided and any existing or newly created Crystal reports can be run from the EPM portal provided one of the following criteria applies:

- The report does not use any parameters or
- The report uses parameters that match those on the EPM portal reporting screens.

Reports that do not meet these criteria can still be run from the v4 Client.

Standard Reports

The following standard reports are provided.

NOTE: *These are sample reports provided for the initial release of EPM Provider portal and, as such, are not supported for future releases. Any required amendments can be made by the local authority or can be requested as chargeable work.*

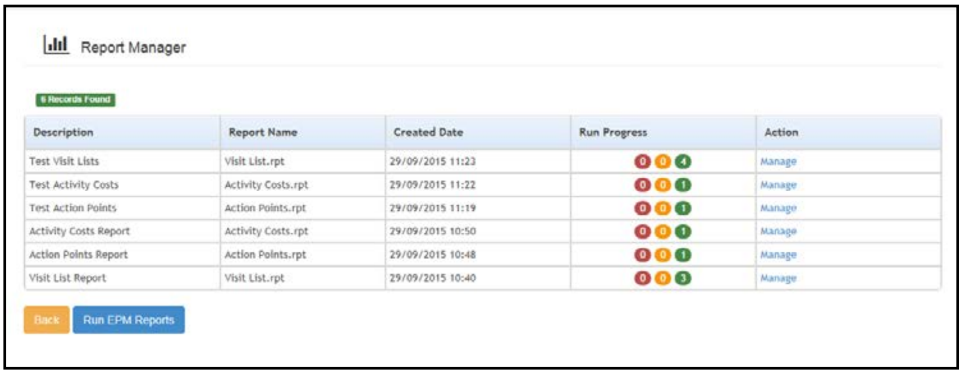
Report	Description
Action Points	Lists all action points that match the parameters. The date range is applied to the due date and all other parameters relate to the visit to which the action point is associated.
Activity Costs	Lists all costs recorded against activities. The Business Unit ID and Activity ID are the only parameters used in this report.
External Finance Reference Numbers	A simple list of all bases with a reference number recorded (no parameters).
Invoices	A basic template to be used with the invoice routine. This report will produce one page per invoice number.

Report	Description
Invoices Issued	A list of all issued invoices. The date range is applied to the invoice date and all other parameters relate to the visit to which the invoice relates.
Visit Costs	A list of all visits with costs recorded against them, plus invoice details where relevant. The date range is applied to the visit date and all other parameters relate to the visit to which the invoice relates. An invoiced and un-invoiced total are included in the report footer.
Visit List	A list of all visits. The date range is applied to the visit date and all other parameters relate to the visit. Any questions and answers recorded against the visit are provided as a sub-report.

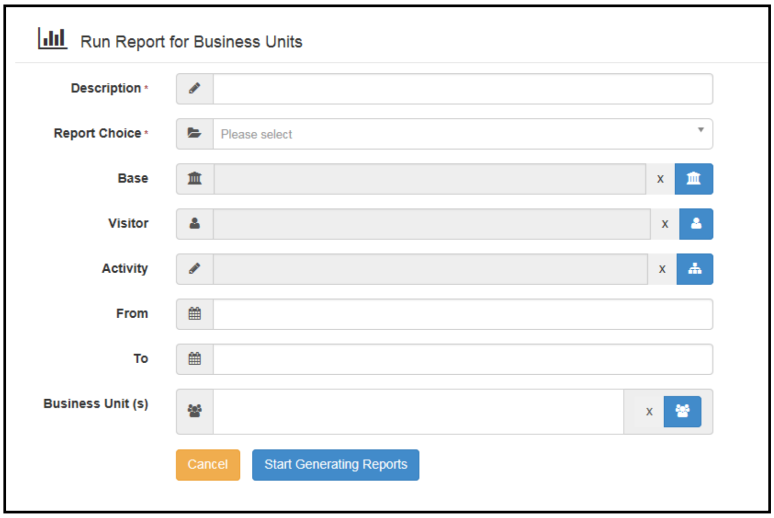
Running a Report

NOTE: *If no report parameters are selected, the report will be generated for all possible parameters.*

1. Click the **Reports** tile on the **Welcome to EPM** page to display the **Report Manager** page.



2. Click the **Run EPM Reports** button to display the **Run Report for Business Units** page.



3. Enter a **Description**.
4. Select a **Report Choice** from the drop-down list.
5. Enter one or more parameters for the report as follows:
   a. Click the **Base** browse button and select a base.
   b. Click the **Visitor** browse button to display the **Person Search** and select a visitor.

c. Click the **Activity** browse button and select an activity.

d. Select a **From** and **To** date.

e. Select the required business unit as follows:

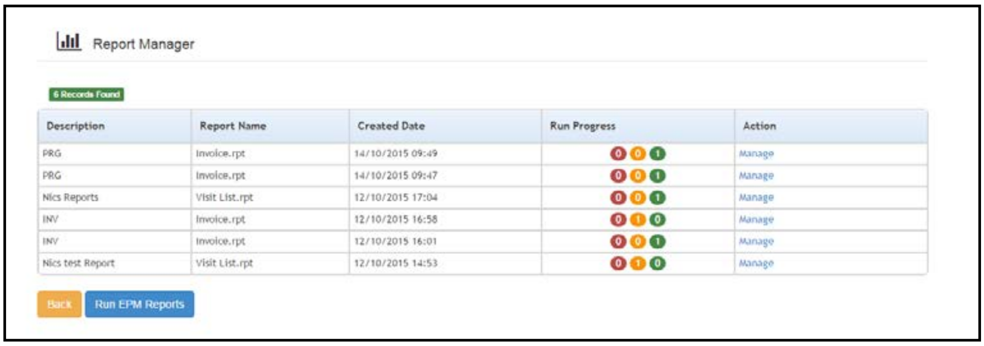
i. Click the **Business Unit(s)** browse button to display a list of shared business units and those to which you have access.

ii. Select the required business unit.

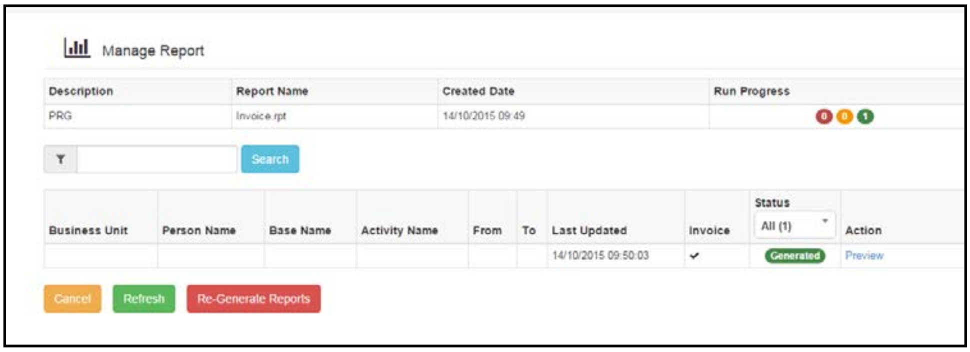
6. Click the **Start Generating Reports** button.

Managing EPM Reports

1. Click the **Reports** tile on the **Welcome to EPM** page to display the **Report Manager** page.



2. Click the **Manage** link for the required report to display the **Manage Report** page.



3. If required, enter a filter of **Business Unit**, **Person Name**, **Base Name** or **Activity Name** and click the **Search** button.

4. If required, click the **Re-Generate Reports** button to re-generate all reports for the current filter. A confirmation message is displayed.

5. Click the **Yes** button to confirm.

6. If required, click the **Refresh** button to refresh the list.

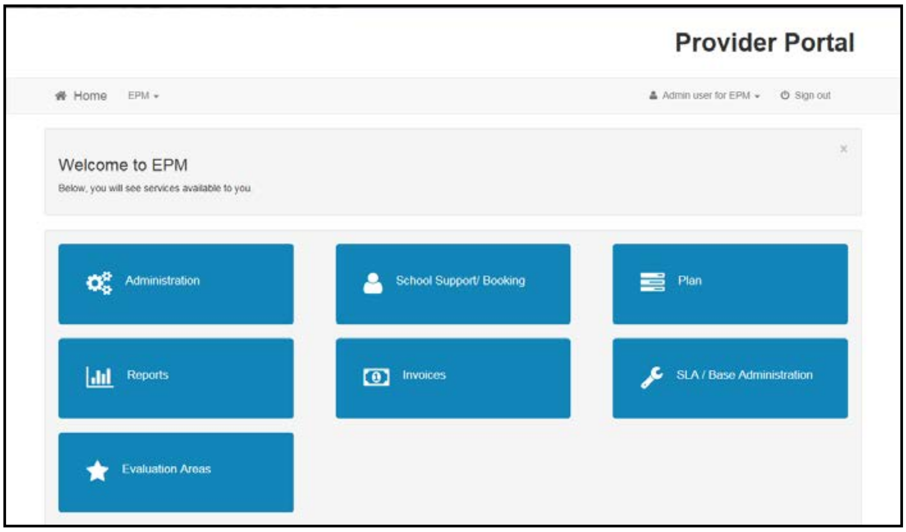
7. If required, click the **Preview** button to preview a generated report.

09 | Managing Invoices

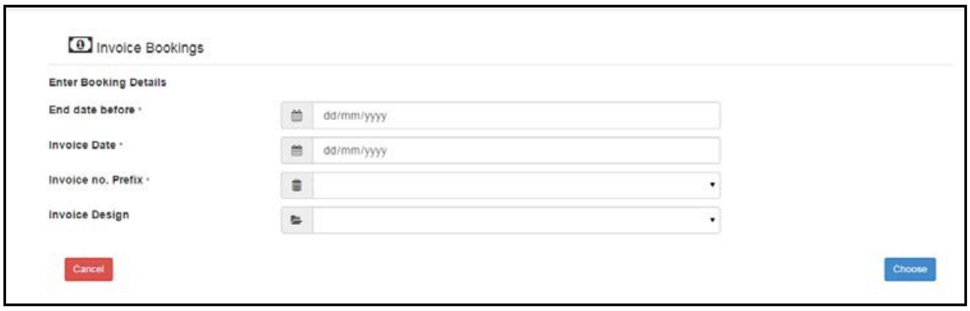
Introduction

Invoices can be produced for any booking with a booking status of **Booked**, **Completed** or **Provisional**.

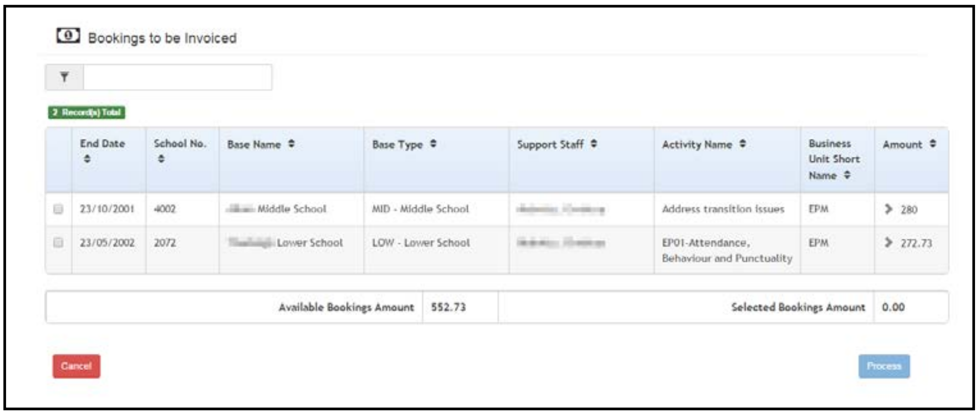
Viewing Bookings to be Invoiced



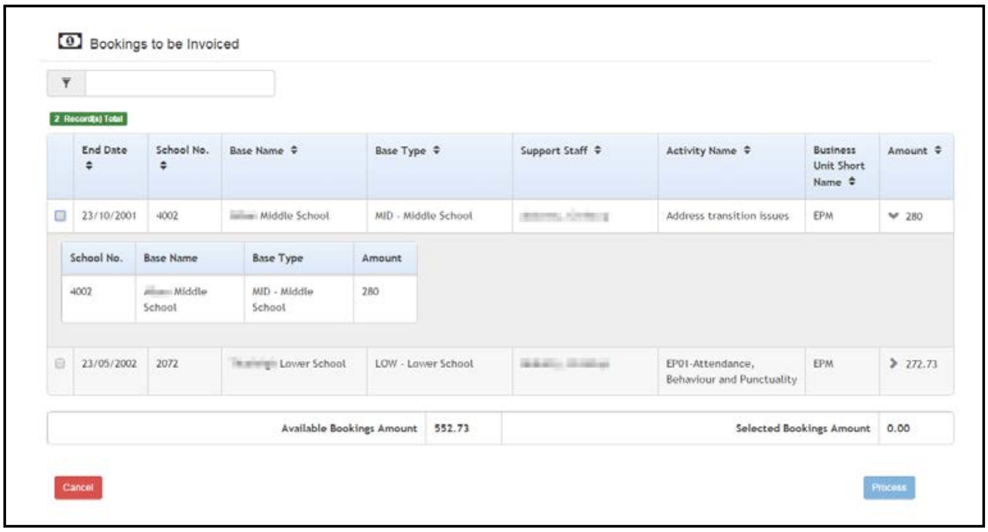
1. Click the **Invoices** tile on the **Welcome to EPM** page to display the **Invoice Bookings** page.



2. Enter the **End date before**.
3. Enter the **Invoice Date**.
4. Select the **Invoice no. Prefix**.
5. If required, select an invoice report template from the **Invoice Design** drop-down. For more information, see Managing Reports on page *85*.
6. Click the **Choose** button to display the **Bookings to be Invoiced** page.



7. If required, click a booking to display the details.

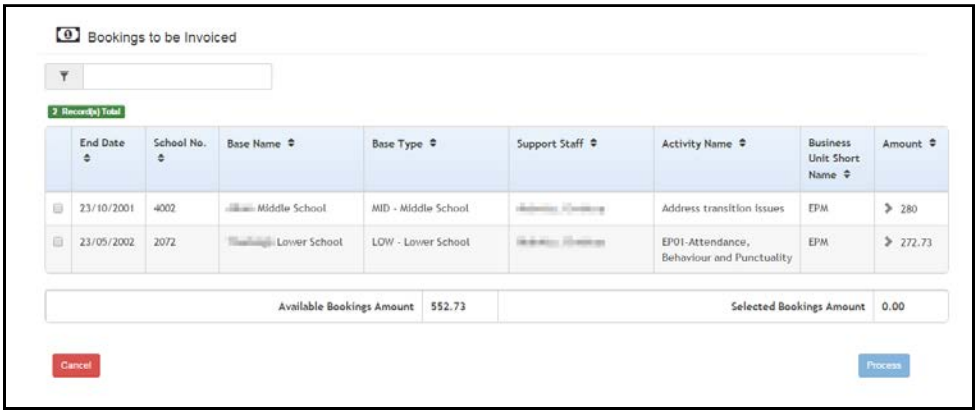


Producing Invoices

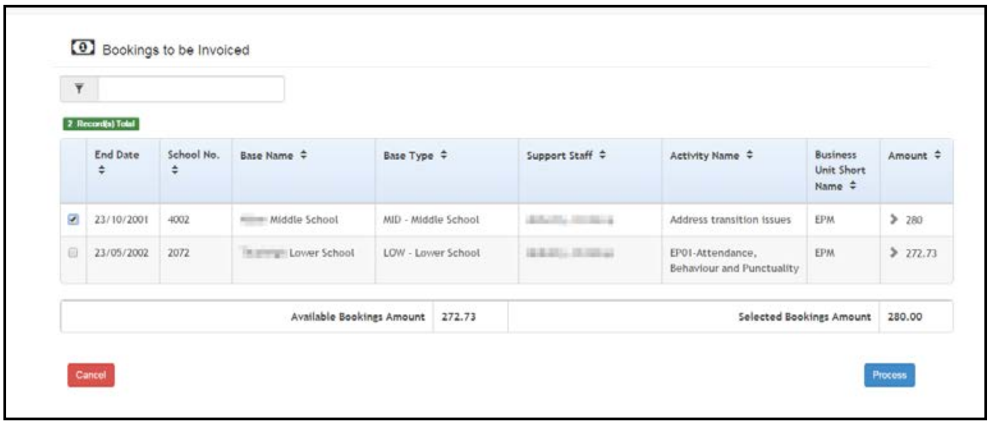
Invoices can be produced for one or more bookings with a status of **Booked**, **Completed** or **Provisional**.

NOTE: *After the invoice has been produced, the booking cannot be updated or any further costs added.*

1. View the bookings to be invoiced. For more information, see Viewing Bookings to be Invoiced on page *89*.

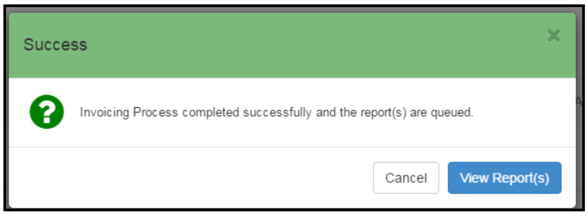


2. Select one or more bookings.

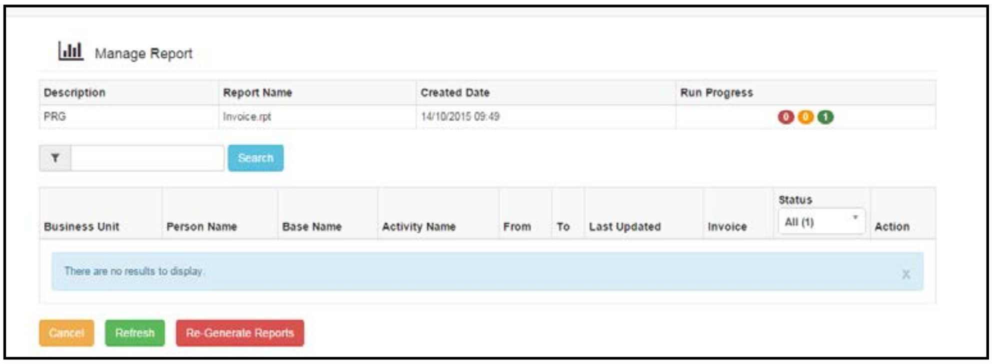


3. Click the **Process** button.

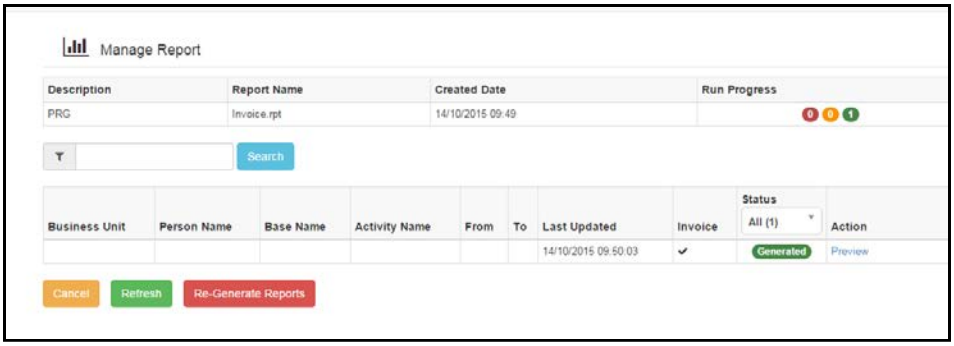
   The following success message is displayed:



4. Click the **View Report(s)** button to display the **Manage Report** page.



5. Click the **Refresh** button to refresh the list of reports.



6. If required, click the **Preview** link to display the invoice.

Invoice

[redacted] **Lower School**
High Street,
[redacted],
BEDFORD,
Simshire,
[redacted]

Invoice number:	PRG00003
Invoice date:	14/10/2015
Our reference:	

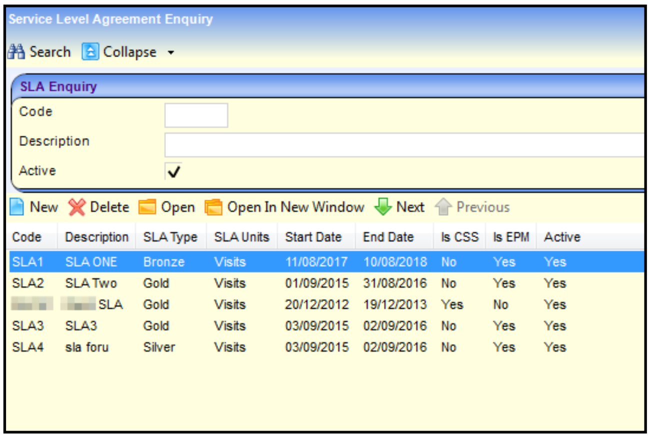
Start date	End date	Visitor	Fee code	Fee
23/05/2002	23/05/2002	[redacted]	Budget Planning	£272.73
				£272.73

The report can be managed via the Report Manager. For more information, see Managing EPM Reports on page *87*.

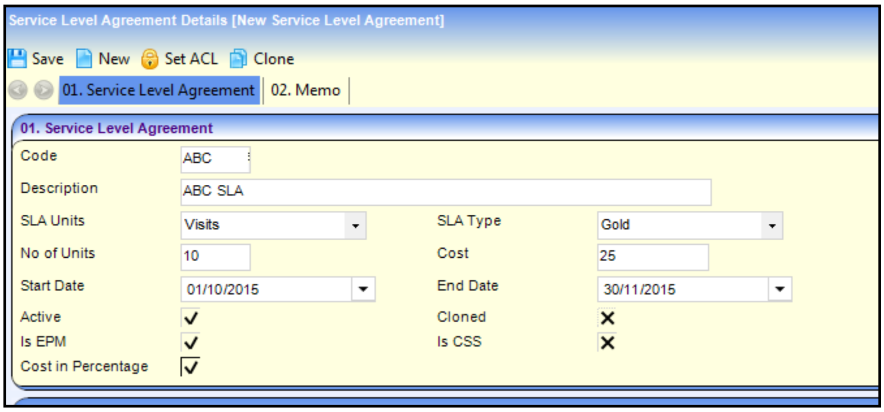
10 | Administering Service Level Agreements

Introduction

Service Level Agreements (SLAs) are created in the v4 Client via **Focus | Services | Service Level Agreements | Maintain Service Level Agreement**.



To enable the SLA to be used in EPM and assigned to a base, the **Is EPM** check box and the **Active** check box must be selected as shown in the following graphic:



NOTES: *If the **Cost in Percentage** check box is selected, the SLA will be applied as a percentage. An SLA that is defined in CSS cannot be selected in the EPM portal.*

For more information, see Defining a New SLA on page *18*.

Assigning a Service Level Agreement to a Base

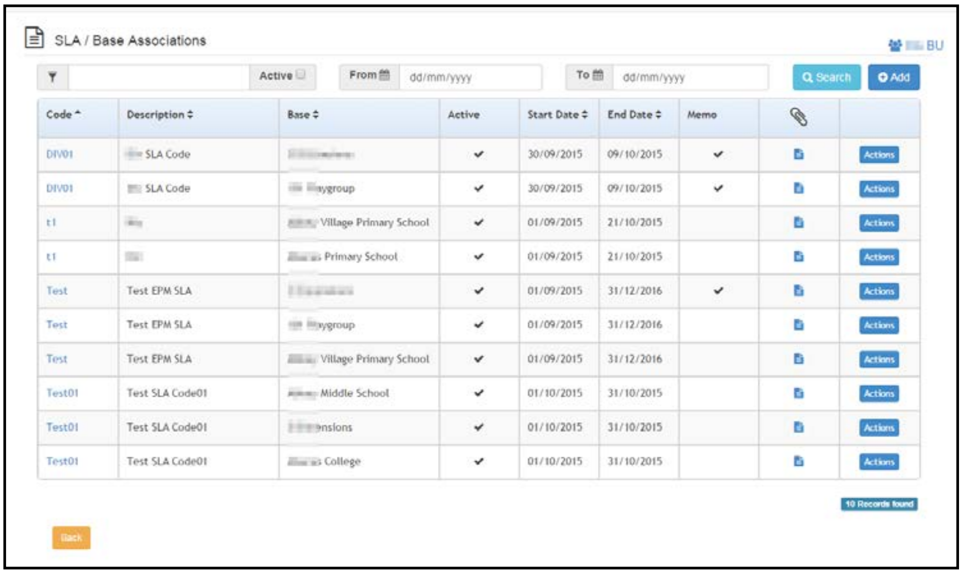
A Service Level Agreement can be assigned to one or more bases. This enables costs to be calculated based on the SLA.

Adding a New SLA/Base Association

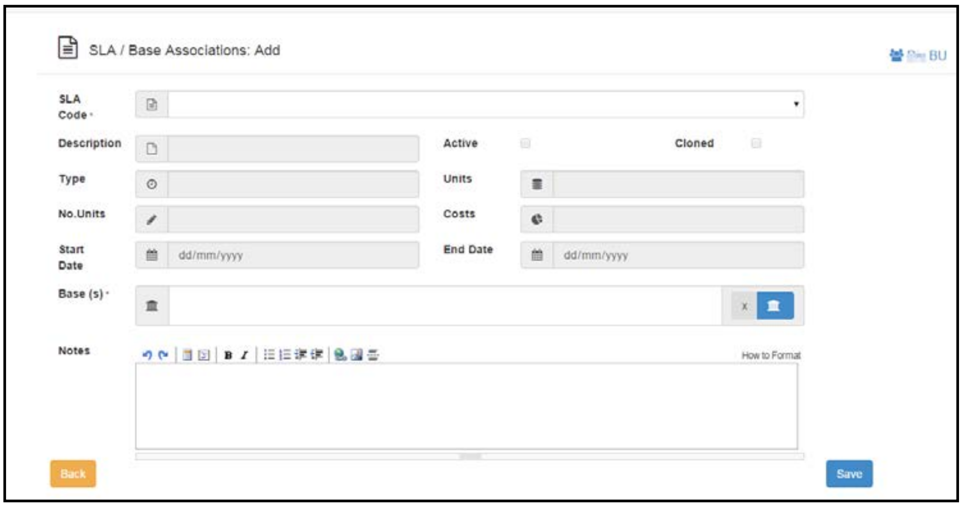
1. Click the **SLA/Base Administration** tile on the **Welcome to EPM** page to display the **SLA/Base Administration** page.

2. Select the **SLA/Base Associations** tile to display the business unit selector page.

3. Select the required business unit to display the **SLA/Base Associations** page.

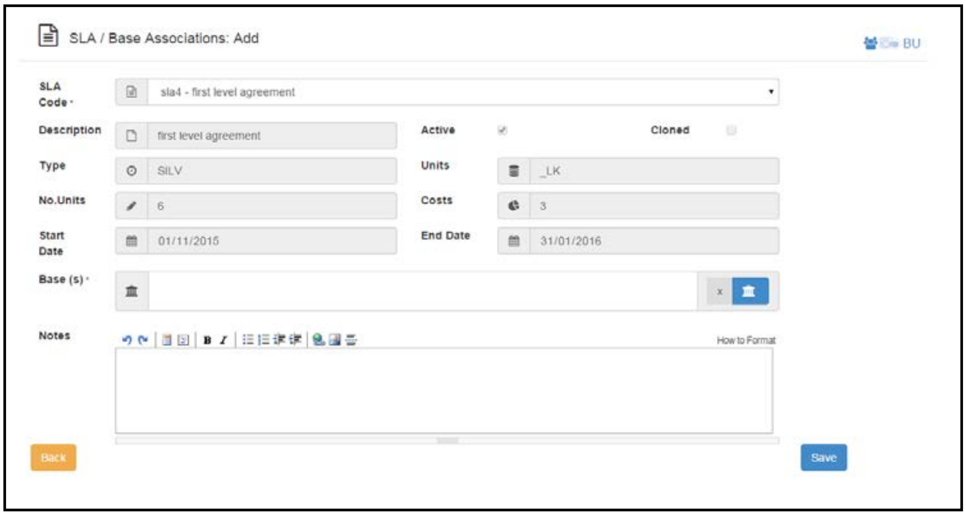


4. Click the **Add** button to display the **SLA/Base Associations: Add** page.

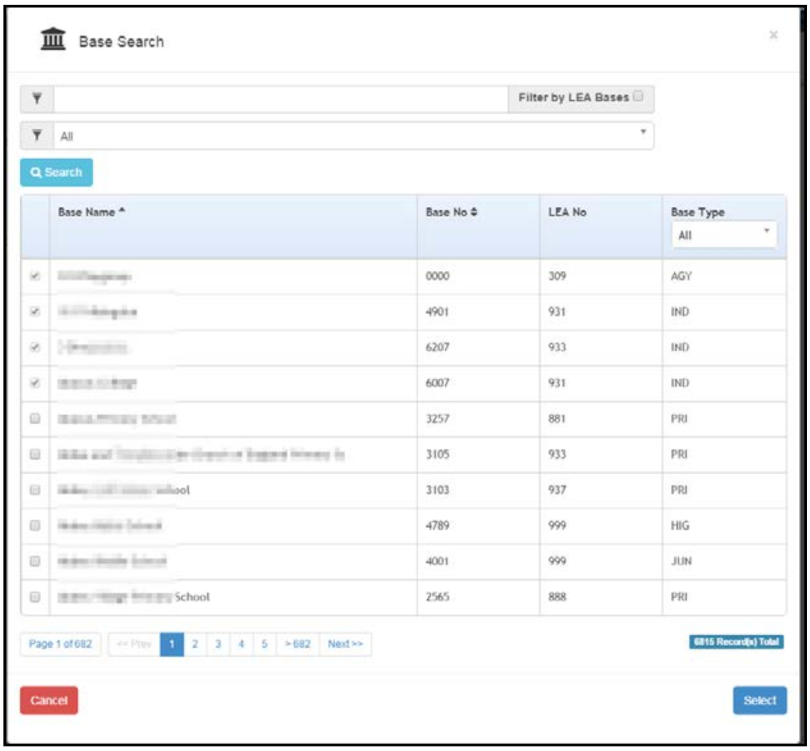


5. Select an **SLA Code** from the drop-down list of SLAs defined for EPM. For more information, see [Defining a New SLA](#) on page *18*.

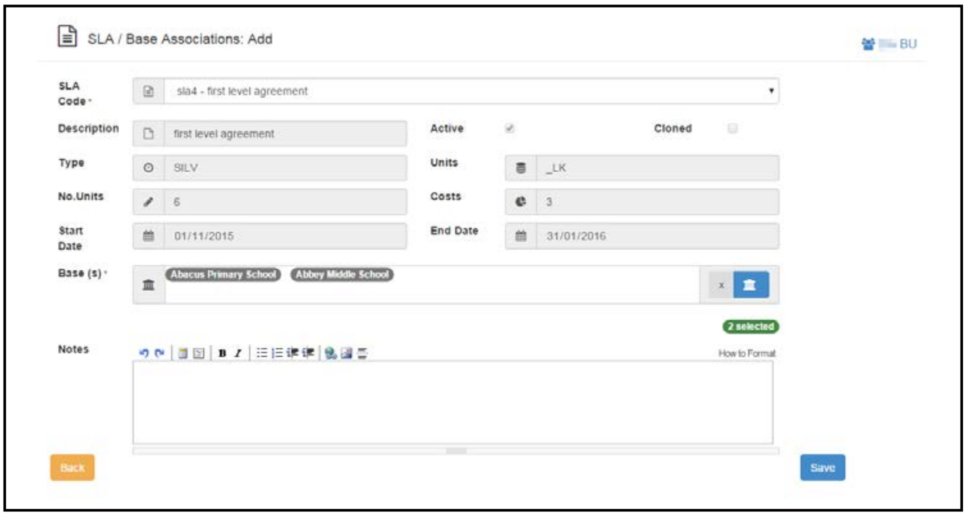
   The fields are automatically completed with the details of this SLA as shown in the following graphic:



6. Click the **Base (s)** browse button to display the **Base Search** dialog with the bases currently associated with the SLA selected.

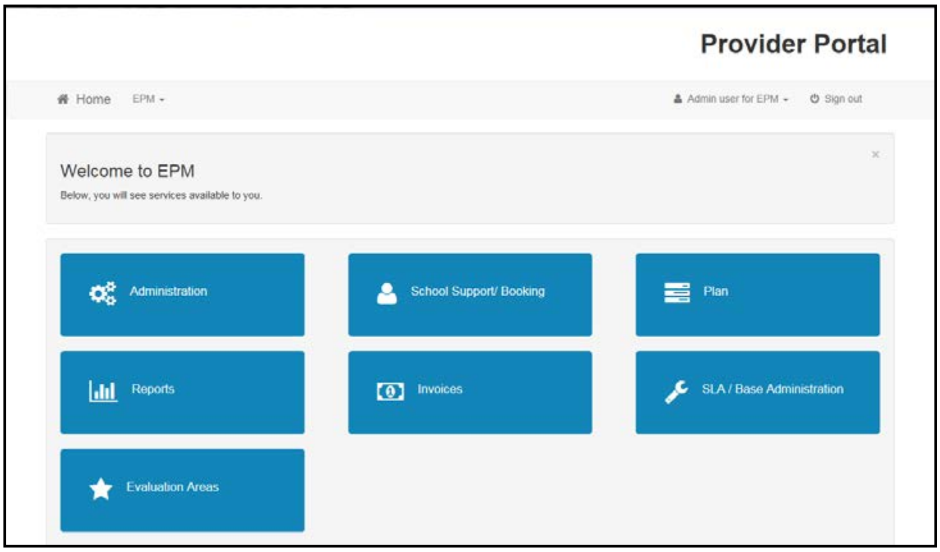


7. To associate a new base or bases:
   a. If required, enter search criteria and click the **Search** button.
   b. Select the required check boxes.
   c. Click the **Select** button to display the **SLA/Base Associations: Add** page showing the selected **Base(s)**.



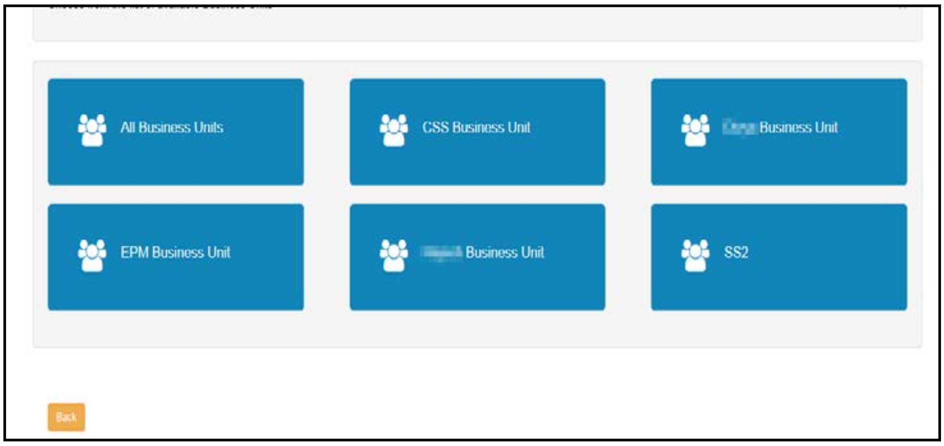
8. If required, enter **Notes** about this association.
9. Click the **Save** button.

Viewing SLA/Base Associations

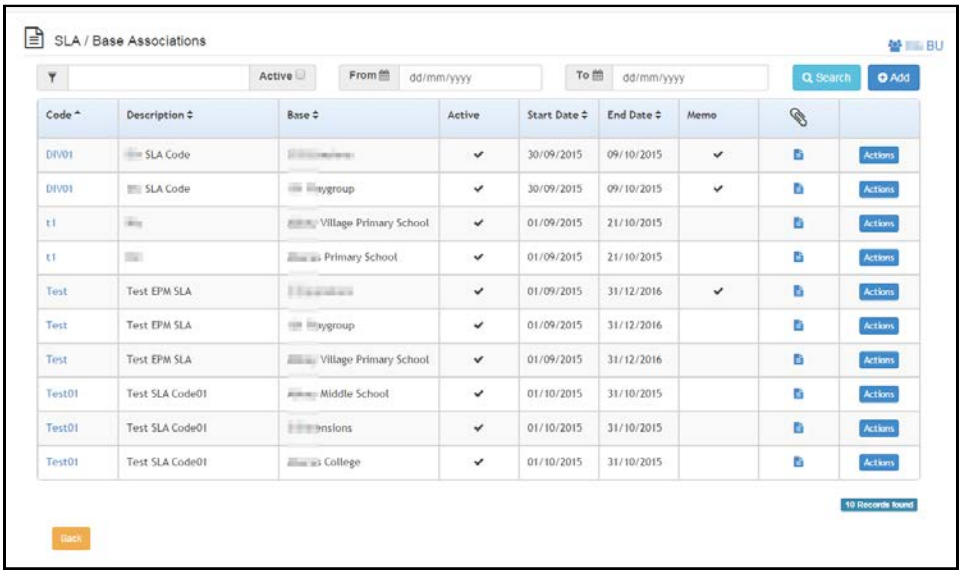


1. Click the **SLA/Base Administration** tile on the **Welcome to EPM** page to display the **SLA/Base Administration** page.

2. Select the **SLA/Base Associations** tile to display the business unit selector page.

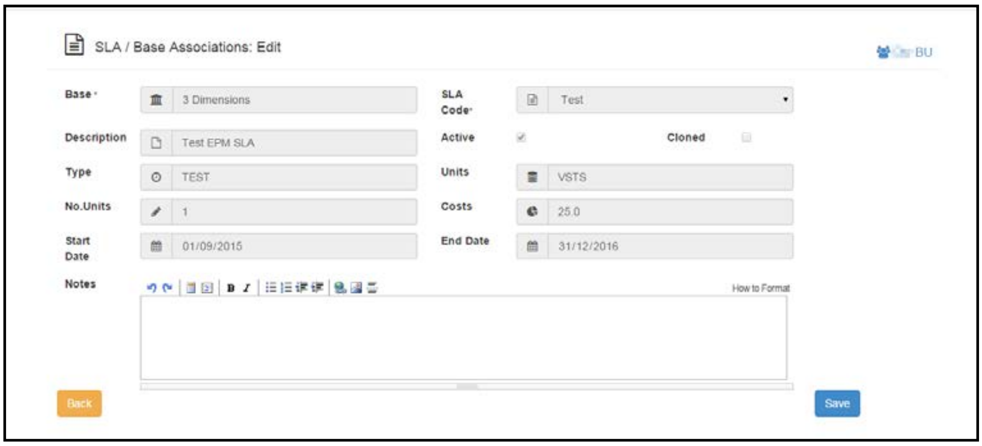


3. Select the required business unit to display the **SLA/Base Associations** page.



NOTE: *If you select **All Business Units**, the data displayed is read-only.*

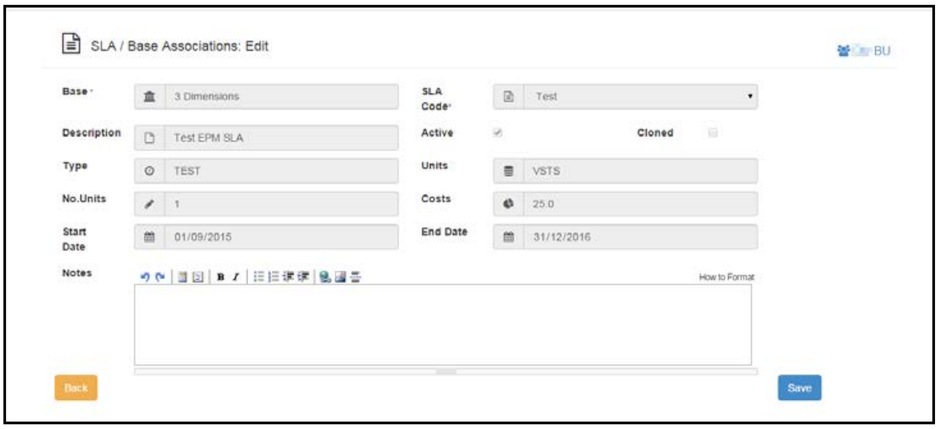
4. If required, enter a filter and click the **Search** button:
   - Enter a full or partial **Code** or **Base**.
   - Select the **Active** check box.
   - Enter a date range.
5. Click the **Code** link to display the details of the **SLA/Base Association**.



Editing SLA/Base Associations

The notes for an SLA/Base association can be updated. No other fields can be edited.

1. View the required SLA/Base Association. For more information, see Viewing SLA/Base Associations on page *97*.
2. Click the **Actions** button adjacent to the SLA / Base association that you want to edit to display the **Actions** dialog.
3. Click the **Edit** button to display the **SLA / Base Association: Edit** page.



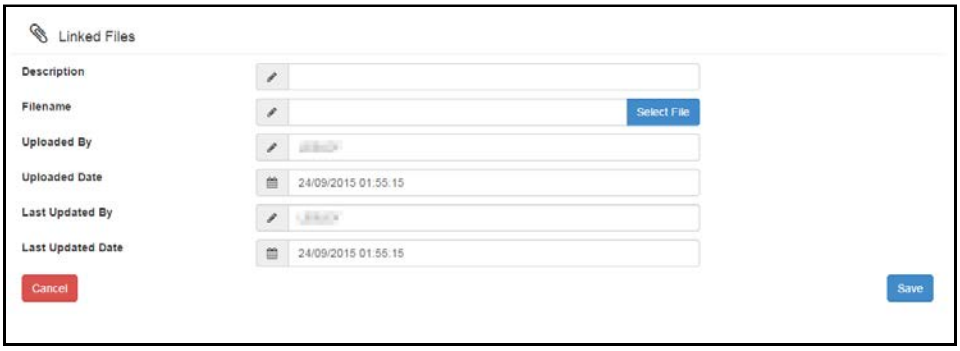
4. If required, enter **Notes** and click the **Save** button.

Adding a Linked File to an SLA/Base Association

One or more linked files can be added to an SLA/Base association.

> ***NOTE:*** *The Provider portal supports linked files of up to 4MB in the following formats: bmp, jpg, txt, doc, docx, xls, xlsx, png, pps or pdf.*

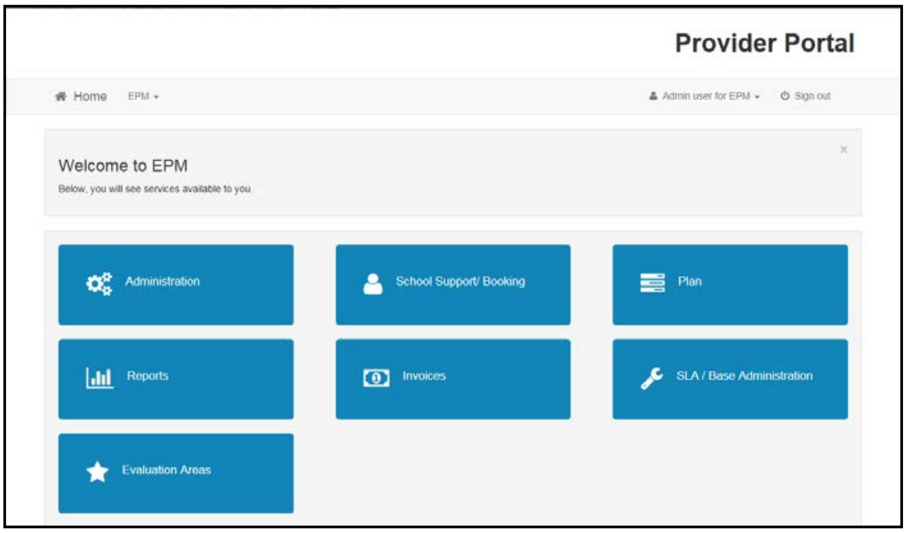
1. View the required SLA/Base Association. For more information, see Viewing SLA/Base Associations on page *97*.
2. Click the **Actions** button adjacent to the SLA / Base association to which you want to add a linked file to display the **Actions** dialog.
3. Click the **Linked Files** button to display the **Linked Files** page.
4. Click the **Add** button.



5. Enter a **Description**.
6. Click the **Select File** button and select the required file.
7. Click the **Save** button.

Managing External References

An external reference code can be used to link a base to an external system e.g. a financial system. A standard report of bases with a reference numbers can be produced. For more information, see Managing Reports on page *85*.



1. Click the **SLA/Base Administration** tile on the **Welcome to EPM** page to display the **SLA/Base Administration** page.

2. Click the **Manage External Ref. for Bases** tile to display the **Manage External Finance References** page.

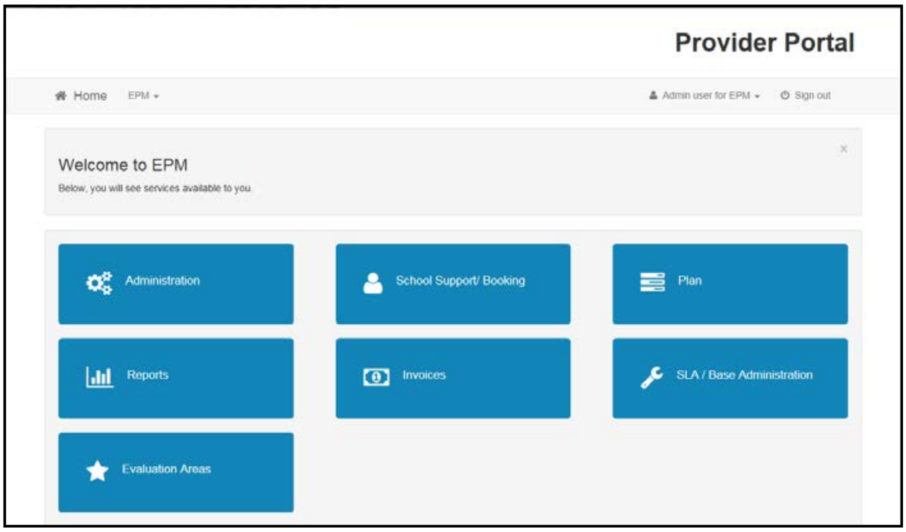
3. Click the **Base** browse button to display the **Base Search** and select a base. For more information, see Selecting a Base on page *60*.
4. Enter an external reference **Code**.
5. Click the **Save** button.

11 | Managing Evaluation

Managing Evaluation Areas

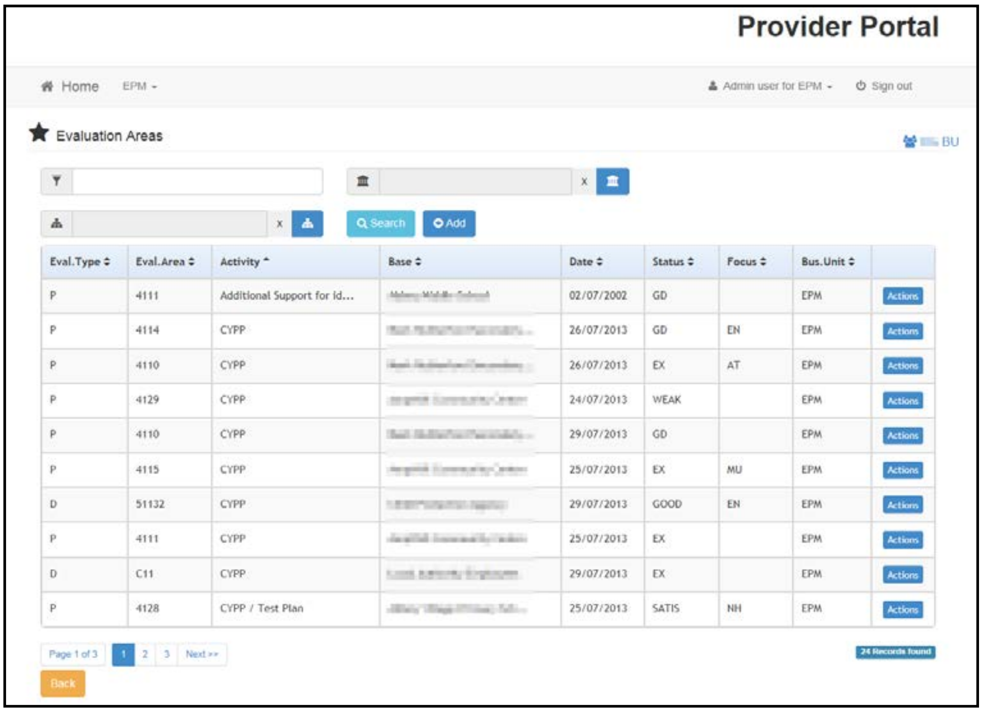
Evaluation areas are accessed via the **Evaluation Areas** tile on the **Welcome to EPM** page.

Evaluation types are Effective Practice (P) and Development (D).



Displaying Evaluation Areas

1. Click the **Evaluation Areas** tile on the **Welcome to EPM** page to display the **Business Units selector** page.
2. Select the required business unit to display the **Evaluation Areas** page.



3. To filter the record list:

a. Enter a filter of **Evaluation Area**, **Base**, **Activity** or **Status**.

b. Search for a base as follows:

  i. Click the **Base** browse button to display the **Base** search and select a base.

  ii. Click the **Search** button.

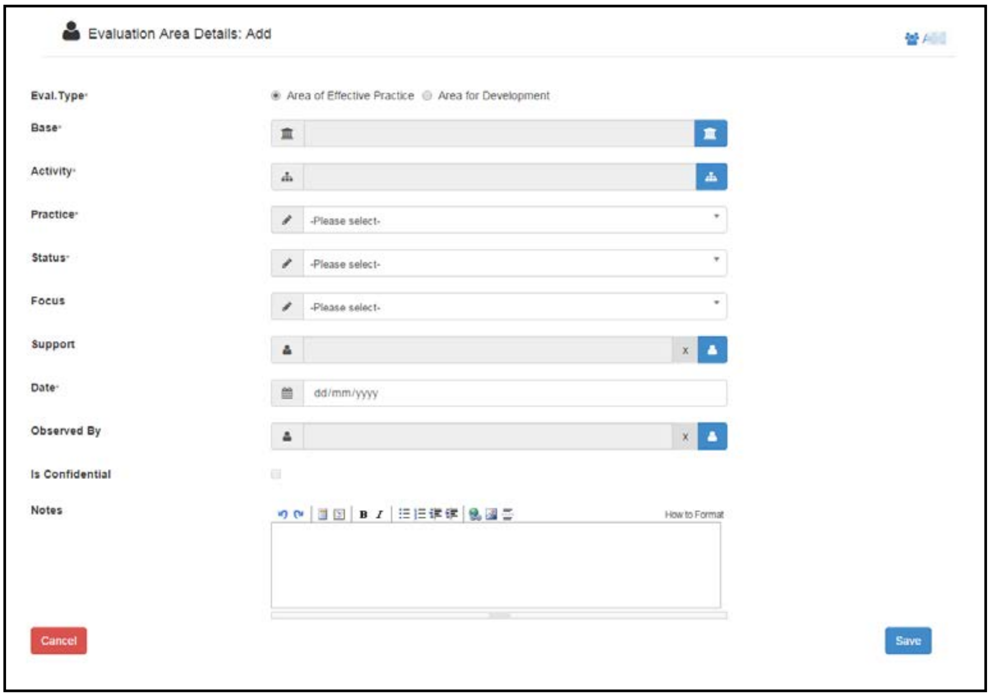
c. Search for an activity as follows:

  i. Click the **Activity** browse button to display the **Select an Activity** dialog.

  ii. Click the **Search** button.

Adding a New Area of Effective Practice

1. Display the evaluation areas. For more information, see Displaying Evaluation Areas on page *101*.
2. Click the **Add** button to display the **Evaluation Area Details: Add** page.
3. Select the **Area of Effective Practice** radio button.



4. Click the **Base** browse button to select a base.
5. Click the **Activity** browse button to select an activity.
6. Select a **Practice** from the drop-down.
7. Select a **Status** from the drop-down.
8. If required, select a **Focus** from the drop-down.
9. If required, click the **Support** browse button to display the **School Support / Booking** dialog and select the required booking.
10. Enter a **Date**.
11. If required, click the browse button to display the **Support Staff Search** dialog and select an **Observed By** person.

Adding a New Area for Development

1. Display the current evaluation areas. For more information, see Displaying Evaluation Areas on page *101*.
2. Click the **Add** button to display the **Evaluation Area Details: Add** page.
3. Select the **Area of Development** radio button.

4. Click the **Base** browse button to select a base.
5. Click the **Activity** browse button to select an activity.
6. Select a **Development** from the drop-down.
7. Select a **Status** from the drop-down.
8. If required, select a **Focus** from the drop-down.
9. If required, click the **Support** browse button to display the **School Support / Booking** dialog and select the required booking.
10. Enter a **Date**.
11. If required, click the browse button to display the **Support Staff Search** dialog and select an **Observed By** person.

Index