One IYSS Access Rights

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Clarification Statement

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

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onepublications@capita.co.uk

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

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01 | **IYSS**

We are aware that some IYSS customers have been using the System Admin permission in One for IYSS users. System Admin gives a very high access level to users which we would not recommend as this would have the impact of overwriting any Read Only access permission subsequently applied.

To assist you, we have documented the expected permission sets that will give users access to everything required without the use of Sys Admin. We would encourage you to check and confirm that your IYSS users are not set as System Admin in One.

If you do have any queries on the contents of this document please contact One Application Support in the normal way and we will be happy to help.
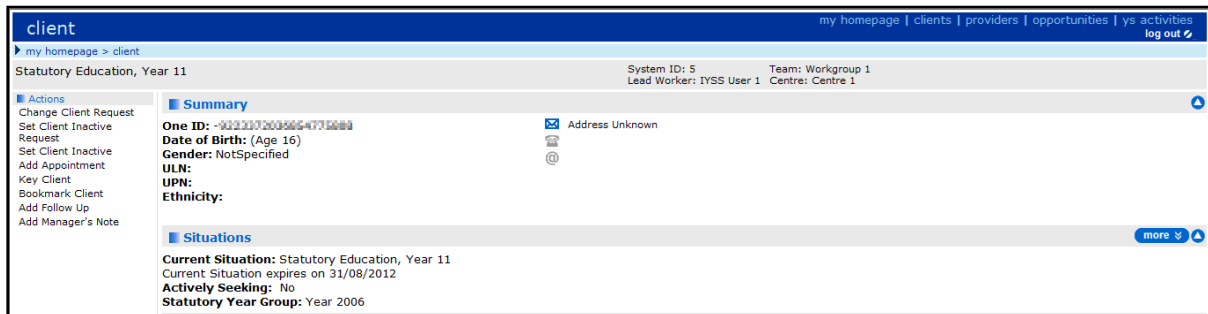
Kind regards,

Emma Wrigley

Product Manager

02 | IYSS Access Rights

Introduction

System access rights in One need to be set along with access rights in IYSS to allow users to correctly view and edit Client details.

If the user has no additional rights within the One v4 system, the Client screen is displayed as follows:

This screenshot shows that not all of the data regarding the Student is shown correctly.

Read Only Access

To give a user 'read access' to the Client the following access rights need to be set within One:

- **User Group Processes Editor | Addresses**
  - Person/Student Addresses – set to Read
- **User Group Processes Editor | Person Administration**
  - Person Details – set to Read
- **User Group Processes Editor | Student Data**
  - Student Data – set to Read

Setting these group permissions also sets all the relevant business processes to Read.

This screen shows you the details when a user has Read access rights:

The **Interactions and Communications** panel is displayed (as below) if the user does not have access to **Communication Log**:

To give a user 'read access' to the **Interactions and Communications** panel the following access rights need to be set in One:

- **User Group Processes Editor | Administration**
  - Communication Log – set to Read

This screen shows you the details that are displayed when the user has Read Access rights:

Statutory Year Group: Year 12

No Interactions and Communications

The **Professional Contacts and Involvements** panel is shown as below if the user does not have access to **Communication Log**:

Professional Contacts and Involvements   more ⌄ ⬆

Lead Worker is IYSS User 1 (Active)
No Contact Information Available
Lead Professional is Not Selected

ⓘ Involvements
Unable to retrieve data. You do not have the appropriate permission(s) to view this data.

To give a user 'read access' to the **Professional Contacts and Involvements** panel the following access rights need to be set in One:

- **User Group Processes Editor | CSS Administration**
  - Involvement – set to Read

This screen shows you the details that are displayed when the user has Read access rights:

Professional Contacts and Involvements   more ⌄ ⬆

Lead Worker is IYSS User 1 (Active)
No Contact Information Available
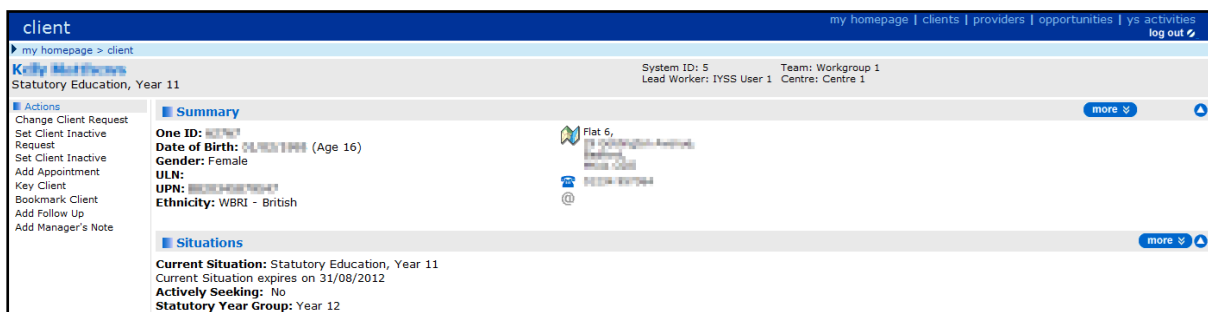**Lead Professional is Not Selected**

Read / Write Access

To give a user 'read/write access' to the Client the following access rights need to be set in One:
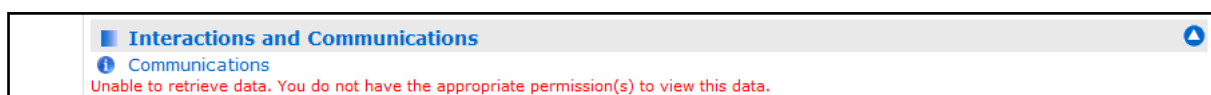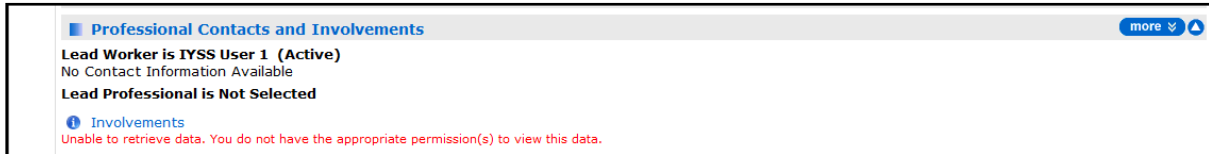
- **User Group Processes Editor | Addresses**
  - Person/Student Addresses – set to Read-Write
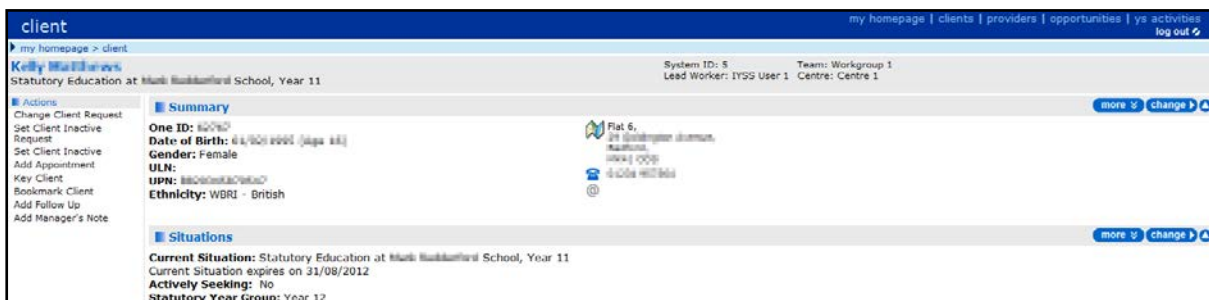- **User Group Processes Editor | Person Administration**
  - Person Details – set to Read-Write
- **User Group Processes Editor | Student Data**
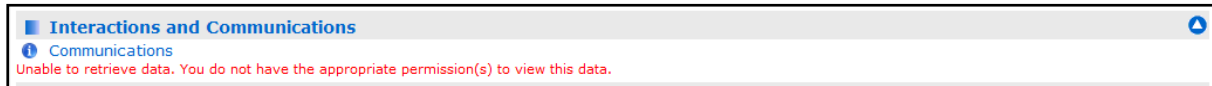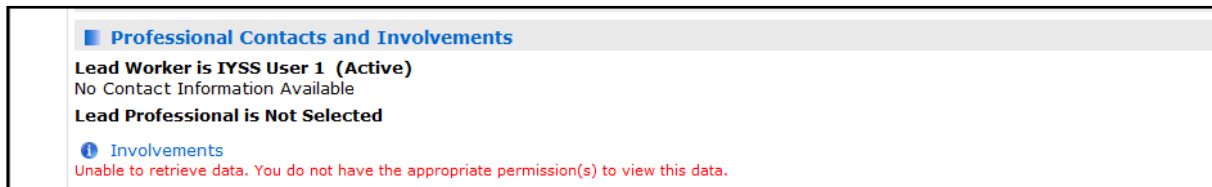 - Student Data – set to Read-Write

Setting these group permissions also sets all the relevant business processes to Read-Write.

The below screen shows you the details that are displayed when the user has Read/Write access rights:

client	my homepage	clients	providers	opportunities	ys activities

▶ my homepage > client

Kelly Matthews
Statutory Education at Mark Rutherford School, Year 11

System ID: 5   Team: Workgroup 1
Lead Worker: IYSS User 1 Centre: Centre 1

Actions
Change Client Request
Set Client Inactive Request
Set Client Inactive
Add Appointment
Key Client
Bookmark Client
Add Follow Up
Add Manager's Note

Summary   more ⌄ change ▶ ⬆

One ID: 60062
Date of Birth: 01/09/1991 (age 21)
Gender: Female
ULN:
UPN:
Ethnicity: WBRI - British

Flat 6,

Situations   more ⌄ change ▶ ⬆

Current Situation: Statutory Education at Mark Rutherford School, Year 11
Current Situation expires on 31/08/2012
Actively Seeking: No
Statutory Year Group: Year 12

The **Interactions and Communications** panel is shown as below if the user does <u>not</u> have access to **Communication Log**:

```
Interactions and Communications                                                        ▲
ⓘ Communications
Unable to retrieve data. You do not have the appropriate permission(s) to view this data.
```

To give a user 'read/write access' to the **Interactions and Communications** panel the following access rights need to be set in One:

■ **User Group Processes Editor | Administration**

- Communication Log – set to Read-Write-Delete

The below screen shows you the details that can be shown when the user has Read/Write access rights:

```
▌ No Interactions and Communications                                          new  ▶ ▲
```

The **Professional Contacts and Involvements** panel is shown as below if the user does not have access to **Communication Log**:

```
Professional Contacts and Involvements
Lead Worker is IYSS User 1  (Active)
No Contact Information Available
Lead Professional is Not Selected

ⓘ Involvements
Unable to retrieve data. You do not have the appropriate permission(s) to view this data.
```

To give a user 'read/write access' to the **Professional Contacts** and **Involvements** panel the following access rights need to be set in One:

■ **User Group Processes Editor | CSS Administration**

- Involvement – set to Read-Write

The below screen shows you the details that can be shown when the user has Read/Write access rights:

```
Professional Contacts and Involvements                       more ⌄  change ▶ ▲
Lead Worker is IYSS User 1  (Active)
No Contact Information Available
Lead Professional is Not Selected
```

Read/Write/Delete Access

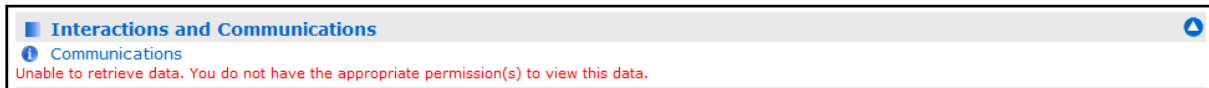To give a user Full Access to the Client the following access rights need to be set in One:

■ **User Group Processes Editor | Addresses**

- Person/Student Addresses – set to Read-Write-Delete

■ **User Group Processes Editor | Person Administration**

- Person Details – set to Read-Write-Delete

■ **User Group Processes Editor | Student Data**

- Student Data – set to Read-Write-Delete

Setting these group permissions also sets all the relevant business processes to Read-Write.

The below screen shows you the details that are displayed when the user has full access rights:
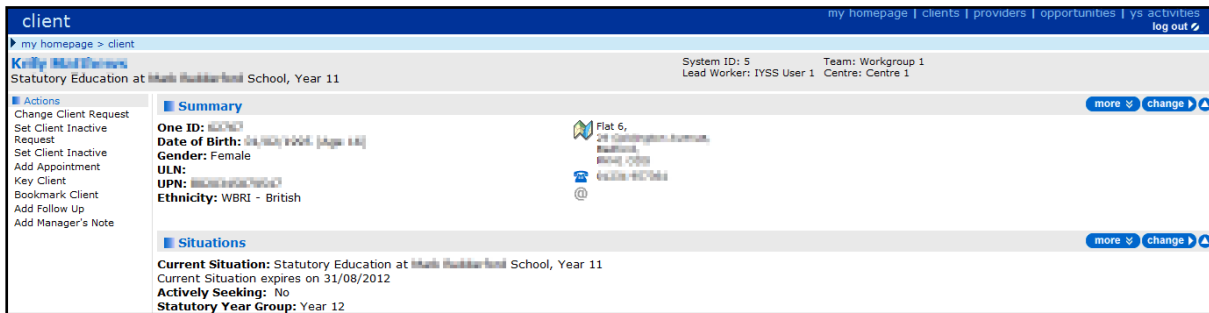
The **Interactions and Communications** panel is shown as below if the user does not have access to **Communication Log**:
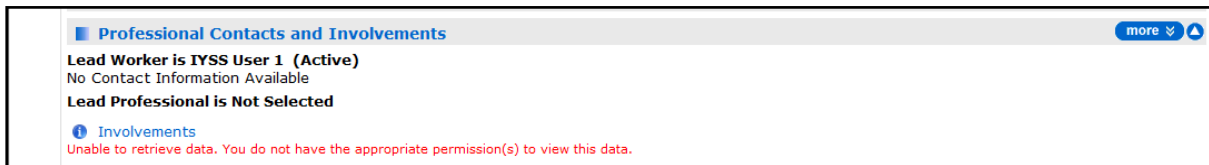

To give a user Read/Write/Delete Access to the **Interactions and Communications** panel the following access rights need to be set in One:

■ **User Group Processes Editor | Administration**

- Communication Log – set to Read-Write-Delete

The below screen shows you the details that are displayed when the user has full access rights:

The **Professional Contacts and Involvements** panel is shown as below if the user does not have access to **Communication Log**:

To give a user Read/Write/Delete Access to the **Professional Contacts and Involvements** panel the following access rights need to be set within One:

■ **User Group Processes Editor | CSS Administration**

- Involvement – set to Read-Write-Delete

The below screen shows you the details that are displayed when the user has full access rights:


Posts, Establishments, Services and Involvements

To allow users to access **Involvement** details they need to be a member of an **Establishment** which is linked to the **Service** which again is linked to specific Involvements.

Definition of a **Post** is a group of users that have the same **Role** or **Responsibilities**. Users are added through the **Tools | Team Structure | Posts | Post Definition Enquiry** screen.

The definition of an **Establishment** is a group of **Posts** that would be linked to a specific **Service**; the **Establishment** needs to contain all of the **Posts** that need to access the **Service** as the system will only allow one **Establishment** for each **Service**.
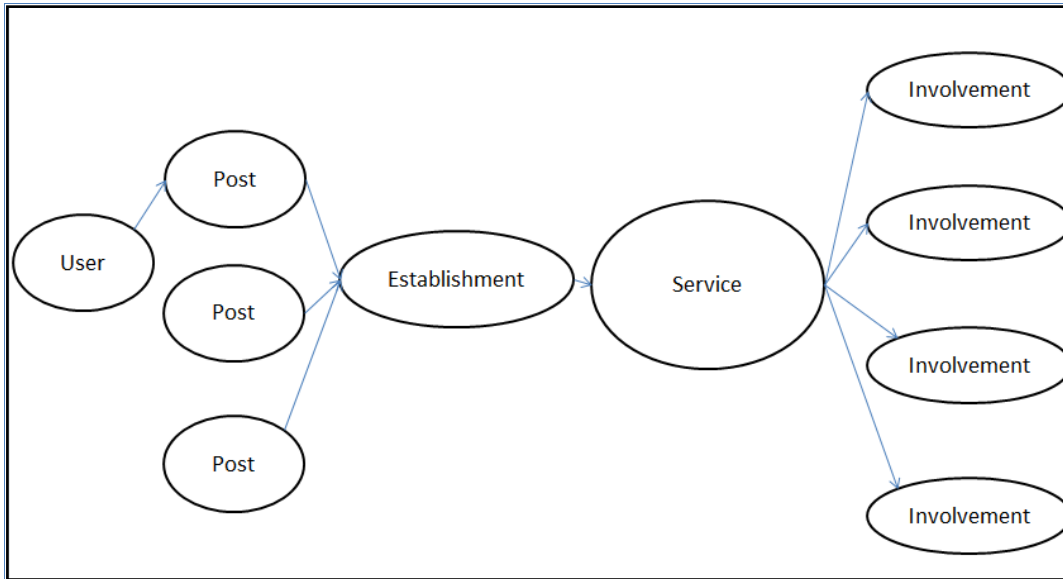
Involvements and IYSS

Within One, an involvement is linked to a Student who may also be a Client within the IYSS system. IYSS users can see these involvements through the **Client | Professional Contact and Involvements** panel which is indicated by a '**Has Involvements**' message when viewing the record. When a user clicks on the **More** button the details of the involvements are shown.

The details that are displayed on whether the IYSS user is a member of the Establishment for the Service that the specific Involvements are linked to.

Not a Member of the Establishment

If the IYSS user is <u>not</u> a member of the Establishment, then the **Status** details are not displayed:

A Member of the Establishment

If the IYSS user is member of the Establishment then the **Status** details are displayed:

03 | Other v4 Client-Owned Permissions

Additional Permissions to Configure in v4 Client

Certain functions and actions in IYSS rely on permissions configured within One v4 in addition to their associated permissions held within the One Youth suite.

Permissions in the **User Group Permissions Editor** can be set to Permit Run or Deny Run:

    Permit Run icon

    Deny Run icon

Permissions in the **User Group Processes Editor** can be set to Read, Read-Write, Read-Write-Delete or Deny.

IYSS Action	v4 Client Permission	Required Setting
Accessing **New** and **Change** client options	In **User Group Permissions Editor**: **System Map | All Secured Services | Student | Save Student Details**	Permit Run
Accessing linked documents	In **User Group Processes Editor**: **Main Business Processes | Administration | Linked Documents**	Read, Read-Write or Read-Write-Delete as appropriate.
Adding interactions to a provider	In **User Group Processes Editor**: **Main Business Processes | Base Administration | Bases**	Read-Write or Read-Write-Delete as appropriate
Accessing Key Providers	In **User Group Permissions Editor**: **System Map | All Secured Services | MaintainBase | Save Base (RichClient)** **NOTE:** *Users must also have the Provider* **Add/Change/Delete | Provider - Change** *permission granted in IYSS*	Permit Run