

Revision History

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FID Administration Handbook/Autumn 2017/2018-02-20

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www.capita-one.co.uk

Contacting One Application Support

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

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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:

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

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01 | FID Administration

The Family Information Directory Website

The FID solution enables Local Authorities to display an online catalogue of childcare and family services through a configurable online website, using data from the One system. FID uses the existing FSD and ECD ISPP exporter in One to populate the website. The FID website is a hosted solution available to customers with an existing FID exporter license. Each LA will have their own URL and can configure their site to apply their local branding and display themes that align with any corporate styles.

The management of the data that is published through the website is initially configured through One's Data Management Tools, but Local Authorities are able to further localise the information that is available in the FID website by adding and managing pages and website 'soft' content and the appearance of some of the data through the administration tools.

FID Administration

02 One Configuration for FID

The existing FID XML feed in One is utilised to populate the FID website through the ECD and FSD XML extract files. The data is transferred to the website using the ISPP Exporter process.

One sends the Service Provider information as an individual file / data stream. This is then received by a secured and authenticated web service which is capable of accepting:

- A single Service Provider as a data stream (in the message).
- A single Service Provider in a single XML file.

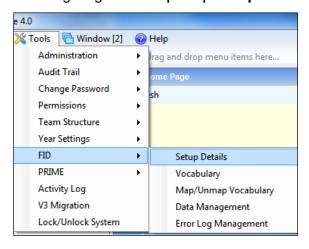
Technical Pre-Requisites for running the ISPP exporter process

The consoleappsetup.msi needs to have been installed under Capita in the program files folder. This will need to be installed on the same machine that holds the Oracle client on the server.

On opening the consoleappconfig.exe, there will be a tab for each of the four configurable applications for ECD, FSD, FSD Exporter and Ofsted. For the purpose of FID website population, only the parameters for ECD, FSD AND FSD Exporter need to be configured. This may need to be done by the LA technical team who will be able to provide the db. Username, db. Password and db. service details.

Configuring FID Setup Details

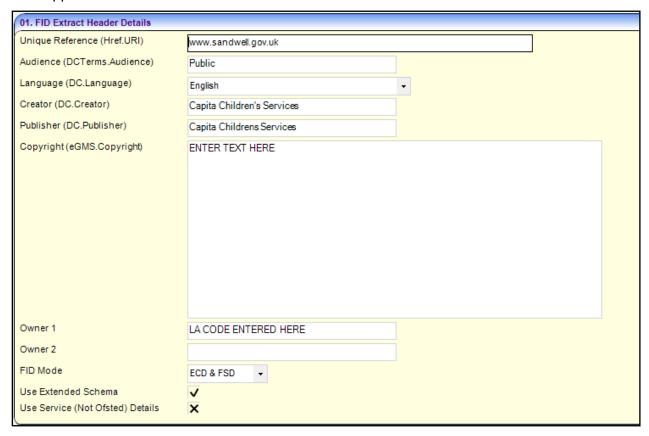
On navigating to Tools | FID | Set Up Details, enter the following into panels 01 and 02.



FID Extract Header Details

Parameter	Example	Description	Default
Unique Reference (Href URI)	www.LA.gov.uk	The LA Council website could be used as a unique identifier for the XML source	Mandatory
Audience (DCTTerms.Audience)	PUBLIC	The intended audience for the information	Mandatory
Language (DC.Language)	English	Defaults to English	Mandatory
Creator (DC.Creator)	Capita Children's Services	Defaults to Capita Children's Services	Mandatory
Publisher (DC.Publisher)	Capita Children's Services	Defaults to Capita Children's Services	Mandatory
Copyright (eGMS.Copyright)	Sandwell@2014	Enter a value here	Mandatory
Owner1	333	Enter a code in here to identify your LA	Mandatory
Owner2	SCVO	Only enter a code in here if you wish to export the data to a second source / website	Optional
FID Mode	ECD & FSD	Select ECD & FSD	Mandatory
Use Extended Schema	Tick $()$ to enable or cross (X) to disable.	If you use the Capita One FID website, you can enable this option to include additional information (such as whether a service is funded for 2, 3 or 4 year olds) in your FID website.	Optional (disabled)
Use Service (Not Ofsted Details)	Tick (\sqrt) to enable or cross (X) to disable.	Enable this option to display the service details for ECD services on the FID website instead of the Ofsted details.	Optional (disabled)

So it appears as below:



FID Contact Details

If required, enter a central address (for example, a council address or a children's centre address) in section **FIS Contact Details**. This information will be used as a substitute contact address for the service provider, where the provider have not consented to share information in the Ofsted updates or if their record has been configured (flagged) to not sharing address information within the XML extract (to be covered later in the document).

Please enter:

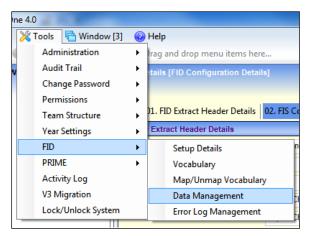
- Address (either by searching the gazetteer or selecting the Select Address icon and entering a new address.)
- Email Address
- Telephone
- Default Contact Address Type.



Click Save to save the data.

Configuring Data through FID Data Management

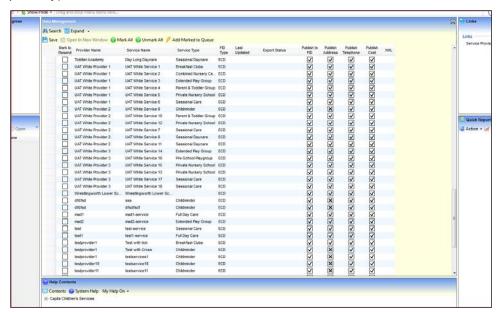
The information that populates the ECD and FSD XML extracts which in turn populate the FID website is defined in the **Tools | FID | Data Management** menu.



Users are able to search and filter for data, including searching by provider or service name, service type or FID type

For example, if searching for child-minders, by searching by service type, users will be shown a list of all matching parameters.

Users can determine which providers are published (sent) to FIDS and determine if the address, telephone number and cost details are published. It is recommended that telephone and cost details are sent across as a default, and address considered (unless the service type was a child minder or a specialist service, where it was felt the address ought not to be disclosed publicly).



After clicking **Save**, users will be able to export the information to a queue for the XML extract. To export, select all the required services (Mark to resend if this is not the first time that an XML extract has been made for that service or provider) and select **Add Marked to Queue**. An onscreen confirmation message will display the number of services that have been sent to the export queue.

Configuring the XML Extract

For detailed information on this process, please consult the *Technical Guide - Installing FID Ofsted Import* document, which is available via the One Publications website (www.onepublications.com).

The consoleappconfig.exe processor works its way through the queued data from One, extracting the service and provider information from the database and converting it into the XML, based on the PKHD schema. This information is then placed in another queue for the ISPP Exporter to process. In the consoleappconfig.exe there are four tabs, two of which need to be configured similar to the examples below.

ECD Parameters

The **ECD** tab will require similar parameters (as shown below) to be entered. The export name and schema location are shown within the footer of the pop up window, and can be entered into the appropriate fields. Please note you will not be able to cut and paste the address details – these will have to be retyped into the input field.

Parameter	Example	Description	Default
DBUSERNAME	onemast	The database username of an account that has read/write permissions – usually obtained from LA technical team who manage the server.	Mandatory
DBPASSWORD	onemast	The password to the above account. As above.	Mandatory
DBSERVICE	onemast	The TNS Names entry for the database. As above.	Mandatory
ECDNAMESPACE	http://dcsf.gov.uk /XMLSchema/Ch ildcare	This appears in the footer of the pop up window. This is the namespace of the Provider Description element of the transformed XML. This value does not normally change.	Mandatory
ECDSCHEMALOCATION	ProviderTypes- v1-1e.xsd	This appears in the footer of the pop up window. The location of the xsd that will be used to validate the transformed XML. Can be the full path, or relative to the executable.	Mandatory
LOGFOLDER	C:\logs	Specifies where the location of the folder in which the log files will be written back to.	/Log Folder

FSD Parameters

The **FSD** tab will require similar parameters to be entered. The export name and schema location will, like the ISPPECDProcessor, be available within the footer of the pop up window, and can be entered into the appropriate fields. Please note you will not be able to cut and paste the address details – this will have to be re-typed into the input field

FID Exporter

This will reuse the same global parameters and will act on the credentials to call the web service.

NOTE: The FID Exporter credentials will need to be provided by Capita Children's Services.

ISPP Processors

To run the ISPPProcessor, double click on the executable file in the local drive. To check that the executable has run successfully, users can check the log files. This will produce a file for each day. If more than one export process is run in a day, the new information will append the existing file for that day.

One Configuration for FID

On navigating back to **Tools | Data Management**, there is an XML hyperlink that appears against each provider in the XML column. On selection, the user can view the XML file that has just been created. This is the XML file that will be sent to the exporter, and used to populate the FID database.

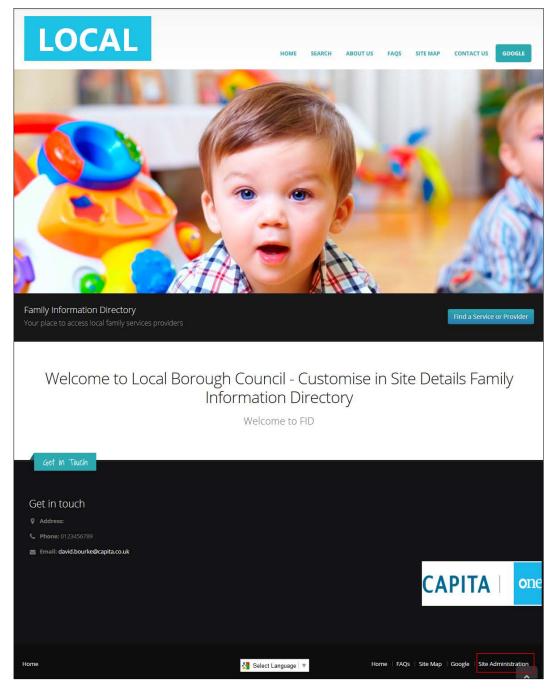
ISPP Exporter

The ISPPExporter reads the data logged in the ISPPECDProcessor and ISPPFSDProcessor queues, and sends it to the PKHD web service – and then onto the FID Website using the credentials provided in the FID exporter. It is expected that the export process will run overnight, but you can run it manually by double-clicking on the executable file in your local drive.

03 | FID Administration Module

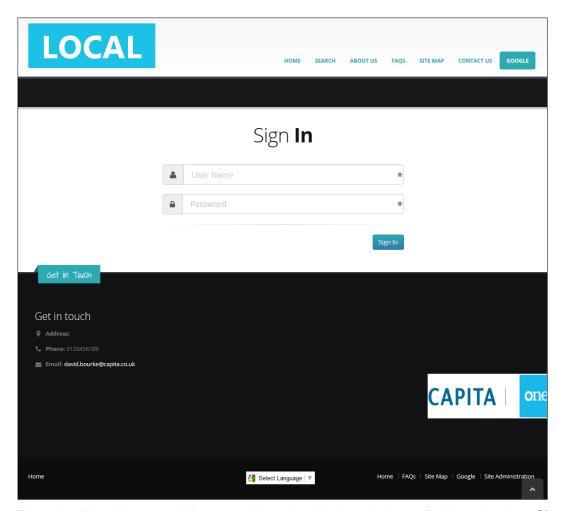
Administration Sign In

To log in as an administrator, sign in through the **Site Administration** link in the bottom right hand corner through the default home page.



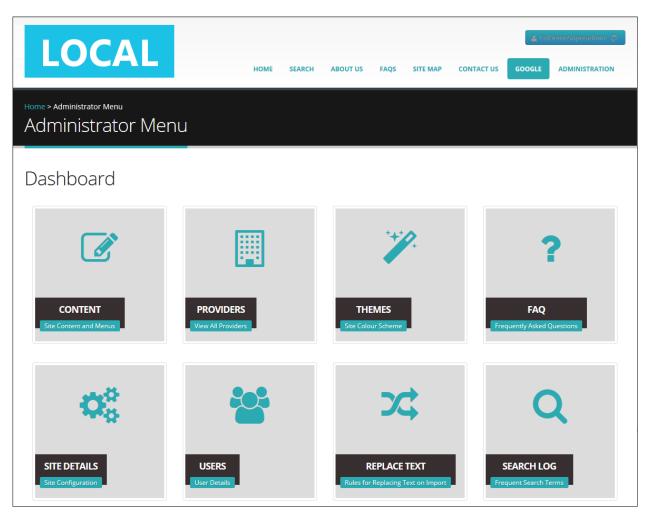
On selecting **Site Administration**, users will be redirected to a sign in page, where the user name and password can be entered.

NOTE: The administration user name and password for your Family Information Directory website will be provided through Capita's Technical Services.



Enter the **User Name** and **Password** credentials into the input fields and select **Sign In**. A warning message is shown to users if they supply the wrong user name or password. If a user forgets their password details, these can be reset by the Administrator through the **Users** section. If the sole administrator forgets their login credentials, this would need to be requested through the Capita Service Desk.

Once signed in, the **Administrator Menu** will appear.



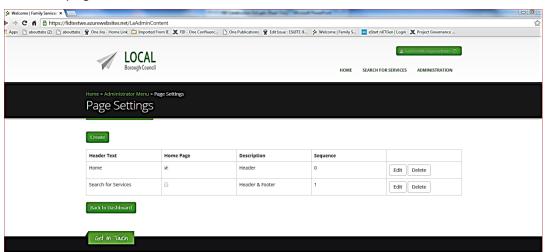
A number of selectable options are available for the Administrator to select from:

- Content Enables administrators to add, edit and delete pages, and configure the content of the pages, including the setting of a default landing or home page, where the links to the site are displayed as well as any other visible information.
- Providers Enables users to view and update providers that are imported to the FID website through the ECD XML extract file.
- **Themes** Enables administrators to define the default colour scheme for the site, as well as uploading a site logo to appear in the top right hand corner of the website, if required.
- FAQ Enables users to set up and manage their own FAQ question and answer content, if required.
- **Site Details** Details of the website, including contact details.
- Users Details of users who are allowed to login and access the administration pages.
- Replace Text Enables administrators to set up rules to replace text, if, for example, a LA has defined the data in one with leading characters to define it from other 'types' of service provider or service information. This will only apply to the information that is displayed in the FID website and will not update the One database.
- Search Log Enables users to view what the public is searching for for example, frequently used search terms or key words.

Site Content

The content section allows administrators to add pages, delete pages and edit the appearance of pages, including the tab position, to include in the site map or to allow other areas to be selectable.

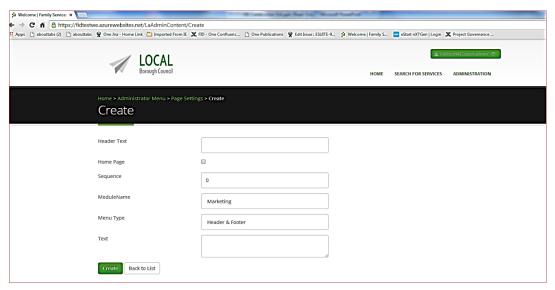
To add a page select Create.



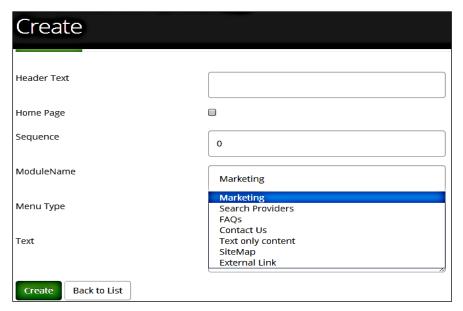
This will launch a new window where the user can add a page.

Creating a Page

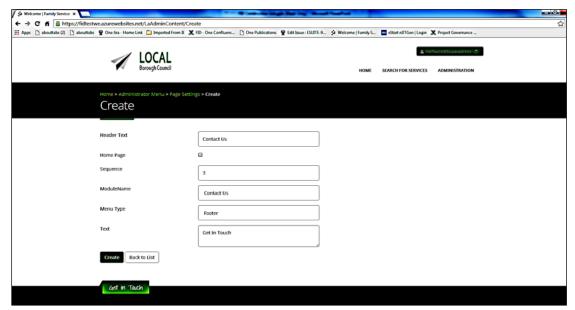
A series of options are available for users to select what type of pages appears in their website, and where the links will be available from.



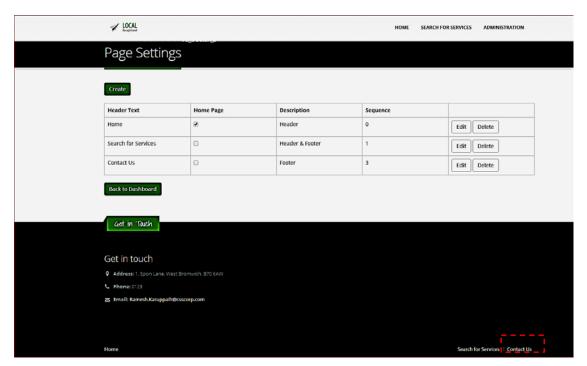
- Header Text This will be the page 'label' that appears on the site. For example: Contact Us.
- **Home Page** Checking this field will make this page the default 'home' or landing page when users access the site.
- **Sequence** Determines how the page orders in the header or footer. For example: 0,1,2,3 etc.
- **Module Name** A drop down that describes the 'type' of page that is created. For example:



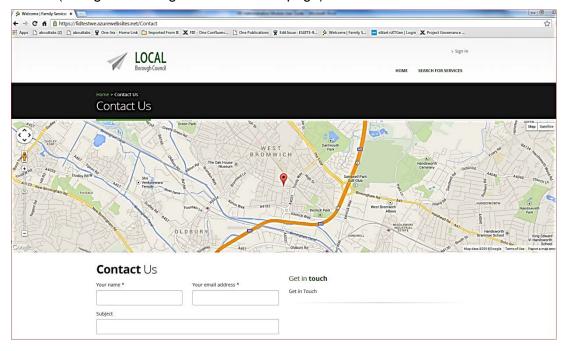
- **Menu Type** A drop down list that determines where the page link will appear on the site on the Header, Footer, Header and Footer, or not to appear in the menu.
- Text Users can add a label description to display on the new page



So for example, if configuring a Contact Us page as below and saving by selecting **Create**, the website will refresh and display the new Contact Us page on the admin module and public facing website, with the page link now shown in the footer.

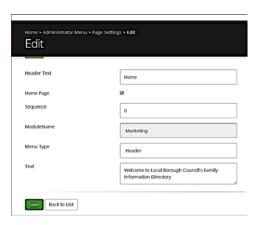


On opening the Contact Us Link, the new contact page is displayed, with the email and contact details (configured through the site details page).



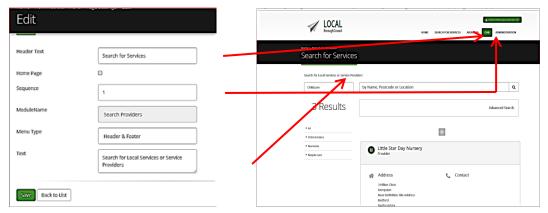
Module Name Page Types

Marketing – The default home page (Home is checked in the set up page), where the marketing material and images area is shown and users can scroll through and access the page links from the headers and footers.

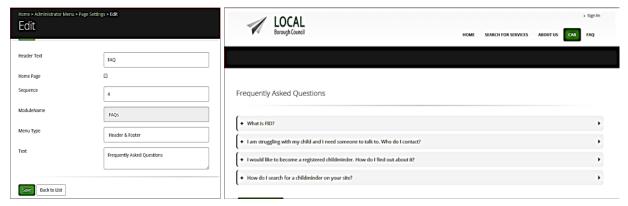




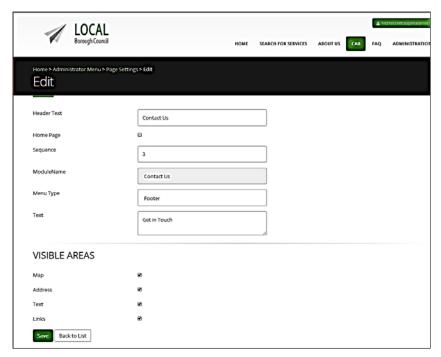
Search Providers – The default search page, from which users can search for the services and providers that have been uploaded using the ISPP exporter process from One.



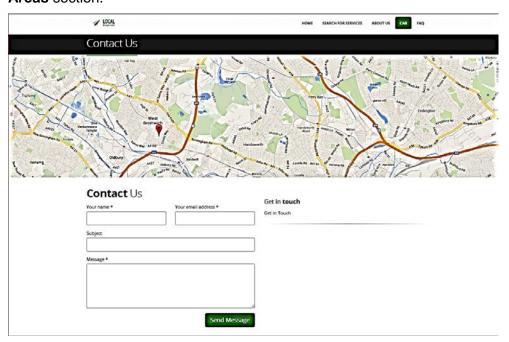
■ FAQ — Enables users to create an FAQ page that can be populated with any FAQs that may be directed to the Family Information Services.



Contact Us – A generic "contact us" page, containing details of the Family Information service and a site map (if selected) and the facility to send an email to a central email address (configured through Site Details).

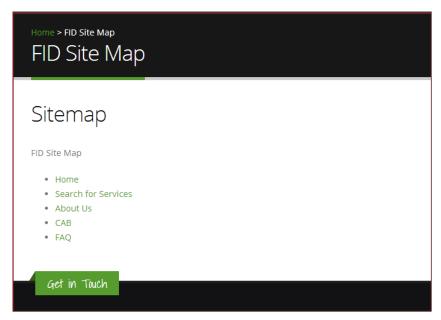


What information is made visible through a contact us page is also configurable – allowing users to switch on or off maps, address, any text or links through the checkboxes under the **Visible Areas** section.



In the example provided, the address fields are hidden, so do not appear in the contact us page.

- **Text Only Content** Enables the set-up of a page that contains text only information for example, a disclaimer or "About Us" page.
- **Site Map** Enables users to set up a site map as an alternative method of navigating the website.



External Links – Enables users to create links that appear as 'tabs' or links in the footer to external websites, (For example, Citizens Advice Bureau or local voluntary services from the website).

The external link will appear as a highlighted option on the top banner (if so configured).

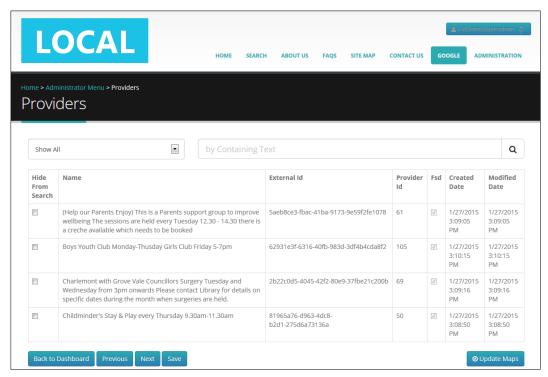


On selecting the link, the user will be taken to the external web site.



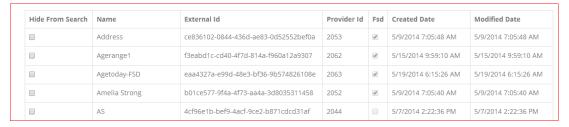
Providers

This page allows administrators to search for providers or services and if necessary hide them from view on the public site, without having to go back into One, adjust the service / provider details and refresh and resend the XML file.



Users \underline{can} search for providers by putting in the first few characters and selecting the **Search** button

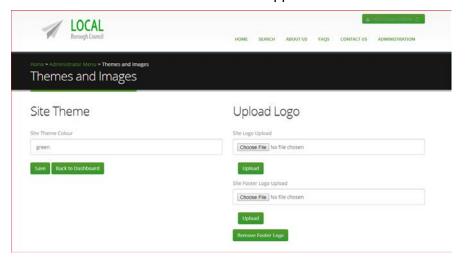
Users can select a provider and check **Hide** to hide their details in the search results. They can also check if the XML file is FSD (checked) or ECD (unchecked).



Click the **Update Map**s button to update the geolocation data of their providers following an XML Import so that they are mapped when using Map Search.

Themes

This page allows users to define the default colour scheme for the site, as well as the site logo. Users can also select a second icon to appear in the footer section of the website.



Site Theme

Administrators can select the default site colour theme from a palette of colours, including:

- Beige
- Blue
- Cyan
- Green
- Navy
- Pink
- Purple
- Red

When a colour is selected the colour of the buttons and background links in the top and bottom banners are changed. This will also display in the public facing website.

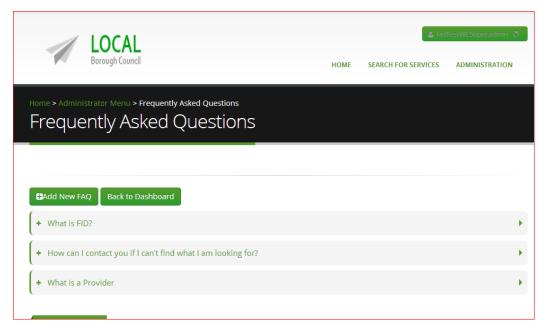
Upload Logo

Users can browse and upload images that are used for the website logo in the header and footer sections (please note only .jpg, .png, and .gif files are supported).

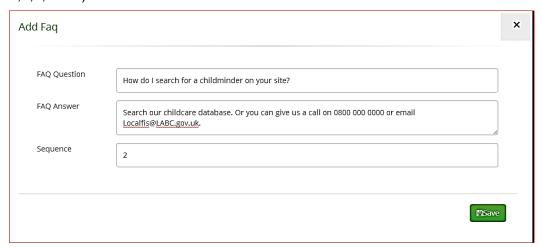
FAQ

Users can add, edit and delete the content that will appear in the FAQ page (configured through the Content page).

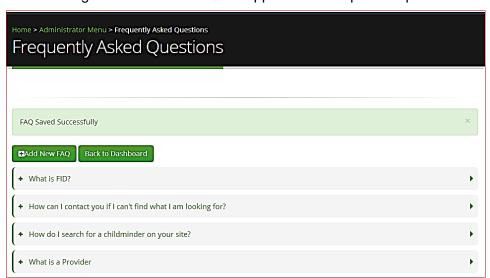
On opening the **FAQ** page, users can choose to see existing FAQ's, which they can expand on select to see the content and choose to update or delete the question or to **Add a New FAQ**.



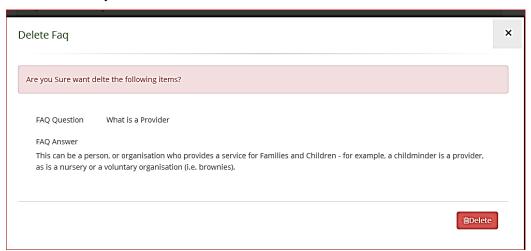
On selecting **Add New FAQ** a new window will appear. Users can add the **Question** and **Answer** and determine where the question will appear in the list of questions (and will order of 0,1,2,3 etc.).



After clicking **Save** the new FAQ will appear in its sequenced position.



FAQs can be edited or deleted by selecting the FAQ. On selection **Update** and **Delete** options will appear. If users select **Update**, they will be able to edit both the question and answer. If users choose to **Delete** the FAQ, users will be warned about deleting the question. By selecting **Delete** the entry will be removed.



Site Details

The **Administration** page records the address and contact details (email, phone) for the Family Information Service that appears in the **Contact Us** banner and **Contact** page. It is also where the SMTP ports and the email details that are used to send emails sent through the **Contact Us** page in the public facing website can be recorded.

Users are able to configure the display of the banner that appears across the marketing, contact and styling theme of the website, including if it is shown on the website. They can also configure the name that appears in the marketing banner on the default home page, if they wish to display the category types (this is populated by the vocabulary mapped against the services and providers in One) in the **Search Details** page. Users are also able to define the message that is shown to members of the public when a record is not found in the search pages.

If users do not wish to display FSD or ECD records in the search results once the information has been extracted from One, (through the ISPP processer), they will need to uncheck the display of the ECD or FSD records. Having chosen what records to display in the search, users are then able to set certain address types as restricted (not fully displayed) in the website using the child care type and provision type – in this instance, child minders and home based care where the provider's addresses are not shown in full.

FIDs can be configured to support Google Analytics information and support. For more information around configuring your FID website to report on website usage, please contact Capita Support through Web Support or call 0870 2411 323 (calls to 0844/0845/0870 numbers will cost three pence per minute, plus your phone company's access charge).

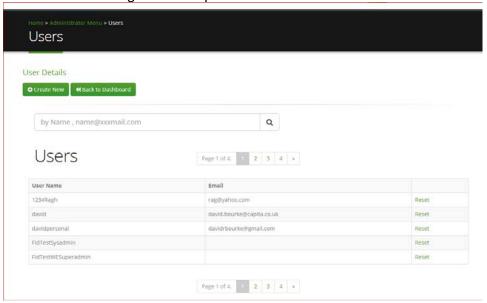
NOTE: More details on Google Analytics can be found at: https://support.google.com/analytics/answer/1008015?hl=en-GB

Home > Administrator Manu > LA Details LA Details	
	oile
Administration Det	allS
CONTACT DETAILS	
Address Line 1	1
Address Line 2	Spoon Lane
Address Line 3	West Bromwich
Address Line 4	
Address Line 5	
Post code	B70 SAW
Telephone Number	08000 000 000
Email Address	Jane.doe@labc.gov.uk
Email Provider Host	smtp.sendgrid.net
Email Provider Port	587
Email Provider User Name	azure_82f85742500dZd06dcd4adefd48241bf@azur
Email Provider Password	/W910VGmHg8m9Vmy/cVP5w
Main Footer	✓
Display Fsd records in Search	✓
Display Ecd records in Search	✓
Code for accessing Google Analystics	
Web site name for homepage	Local Borough Council - change this in Site Details.
Address Exclusions List (Childcare Type, Provision Type)	Childminder, Home ChildCarer, CMR, HCR
Display the Category tags in the Search Summary	✓
Message to display when no search results are found	We're sorry, your search terms returned no result
Save Back to Dashboard	

Site Settings Page

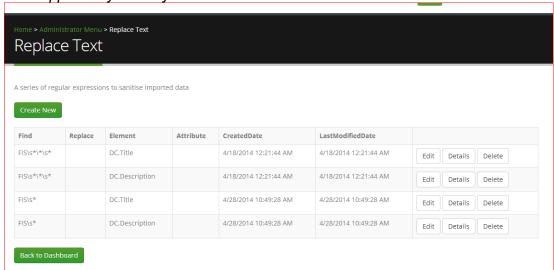
Users

Administrators are able to add additional users through this page. This will allow more than one person to configure the site set up and management through the secure sign in. Users can record the **User Name** and **Email Details**, and if necessary send a password reset to other users who have forgotten their password details.



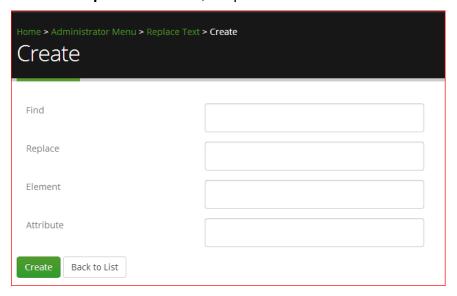
Replace Text

This page offers administrators the ability to change the appearance of service or provider name descriptions in the data that has been imported from One. This is useful if the information has been recorded in One with a prefix, appending description or provider ID number, for example FIS Poppies Day Nursery or Sandra Jones 12345A.



To find text that uses a leading prefix, users can enter the description e.g. "FIS" in the format FIS s**\s*

The search looks for any provider or service record name description that begins with "FIS" but disregards anything that has a space after it (e.g. "Fishbourne"). If users wish to replace the prefix with another value, they can insert a new value in the **Replace** field. Alternatively, if they leave the **Replace** field blank, the prefix will be removed across all matching records.



FID Replace Text Guide

The replace text rules allow the data imported into the FID website to be sanitised before it is processed for display in the website.

Regular expressions can be used to remove or replace text in the imported XML file before it is processed.

When creating a rule the **Find** field is mandatory but the **Replace**, **Element** and **Attribute** fields are optional. However, the **Element** or **Attribute** fields should be considered for use so that the search for an expression to replace is more specific.

Find field

This contains the expression to find. The regular expression should focus on specific text within an element or attribute in the XML.

Expression	Description
FIS\s*	Text starting FIS with a space, e.g. FIS Child minder
FIS\s**\s*	Text starting FIS with a space followed by an asterisk, e.g.
	FIS * Child minder
Family_information@capita- one.co.uk	Matches exact text

Replace field

This contains the text which should replace the found expression. Enter the text that should replace the found text. To remove the found text, leave the **Replace** text empty.

Element field

This is the element which should be checked for the regular expression in the Find field. For example, if the **Find** text will always be in a specific element in the XML, such as the **Title**, then the exact element name should be entered, e.g. *DC.Title*. All DC.Title elements in the imported XML will then be checked for the Find expression.

To focus on a specific element within the import XML document, the full path to the element can be specified using a semi-colon delimited list. For example, to find email address only when it is a SettingDetails address you would use:

The **Element** field will read:

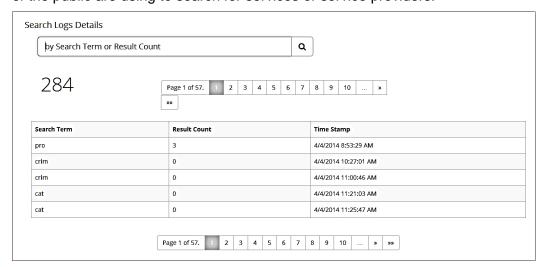
ProviderDetails:SettingDetails:EmailAddress:EmailAddress

Attribute field

This is the attribute that will contain the regular expression to find. For example, the attribute ListName would be entered when looking for an expression that was stored within the ListName attribute.

Search Log

The **Search Log** allows administrators to view the frequently used search terms that members of the public are using to search for services or service providers.



This information is displayed in a tabulated format that is split across pages, showing the description and frequency of the search, alongside the time and date the search took place. Users are able to search the results, for example, by a full or partial search term or by the result count.

FID Administration Module

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