CAPITA

one

Children's Support Services (CSS) Special Educational Needs (SEN)

last updated for the One Summer 2017 (3.63) release

Product Notes

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

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

To contact the Service Desk:

Please log a case via My Account

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

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

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Reference Guides

A number of reference guides have been produced to assist you with the processes in **v4 CSS**, **SEN** and **SEND**. These reference guides can be found on the **One Publications** website via **Documentation Centre | Reference Guides** and on **My Account**. A list of current reference guides and resource numbers can be accessed via **My Account | Knowledge Base | Sticky Items**.

📝 As we are working on the latest reference guides it may be necessary to make amendments to existing ones, so it is advisable to check that you have the latest version available. For example:
This guide is based on the version of the software (3.57) in use at the time of publication.

CSS, SEN & SEND Reference Guides

Activities

RG_Activities_Activities and Linked People

RG_Activities_Activity Calendar

RG_Activities_Creating an Activity

RG_Activities_Recurring Activities

RG_OL_CSS_MWL_Activities_Activity Details

RG_OL_CSS_MWL_Activities_Linked Activities

RG_OL_CSS_MWL_Activities_My Activities

Chronology

RG_Chronology_Case Notes

RG_Chronology_Using the Chronology

Communication Log

RG_OL_CSS_MWL_Involvements_Communication Log_New

RG_OL_CSS_MWL_Involvements_Communication Log_FollowUp

EHCP (Education, Health and Care Plan)

RG_Administration_Printing ICS and EHCP Forms

RG_Involvements_EHCP Assessment Field Interdependencies

RG_Involvements_EHCP Professional Contacts

RG_Involvements_Viewing_Creating EHCP Involvement Forms

RG_Relationships_EHCP

RG_Services_EHCP Administration_EHCP Configuration

RG_Services_EHCP Administration_EHCP Review Type Setup

RG_Services_EHCP Administration_EHCP User Defaults

Equipment

RG_Equipment

RG_OL_CSS_Equipment

HI/VI

RG_Involvements_Hearing Impairment

RG_Involvements_Visual Impairment

RG_OL_CSS_MWL_Involvements_Hearing Impairment

RG_OL_CSS_MWL_Involvements_Visual Impairment

Involvements

RG_Involvements_Creating an Involvement Record

RG_Involvements_Creating an Involvement Form

RG_Involvements_EHCP Assessment Field Interdependencies

RG_Involvements_EHCP Professional Contacts

RG_Involvements_Hearing Impairment

RG_Involvements_Linking a Timeline to an Involvement

RG_Involvements_Viewing_Creating EHCP Involvement Forms

RG_Involvements_Visual Impairment

RG_OL_CSS_Involvements_My Involvements

RG_Services_CSS Administration_Involvement Reallocation

Provision

RG_Provision_Adding a Service_Charge Type Record

RG_Provision_Charge Types setup

RG_Provision_Selecting a Service and Charge Type

Relationships

RG_Relationships_Case Notes

RG_Relationships_Contact Record

RG_Relationships_EHCP

RG_Relationships_Social Network

Services

RG_Service Provision_Availability and Capacity_Opening Details

RG_Service Provision_Availability and Capacity_Other Details

RG_Service Provision_Service Charges

RG_Services_CSS Administration_Involvement Reallocation

RG_Services_EHCP Administration_EHCP Configuration

RG_Services_EHCP Administration_EHCP Review Type Setup

RG_Services_EHCP Administration_EHCP User Defaults

RG_Services_Service Teams

CSS/SEN Summer 2017 Release (3.63)

New Features

RAG Status

For the One Summer 2017 (3.63) release, you can now add a **RAG Status** (red, amber, green) to Generic CSS Involvements. This is to allow clear visibility of high risk cases which can be colour coded to show priority.

This functionality can only be applied to Generic CSS Involvements via **Focus | Services | CSS Involvement Forms | Select Generic CSS Involvement** where there is now a new panel called **RAG Statuses.**
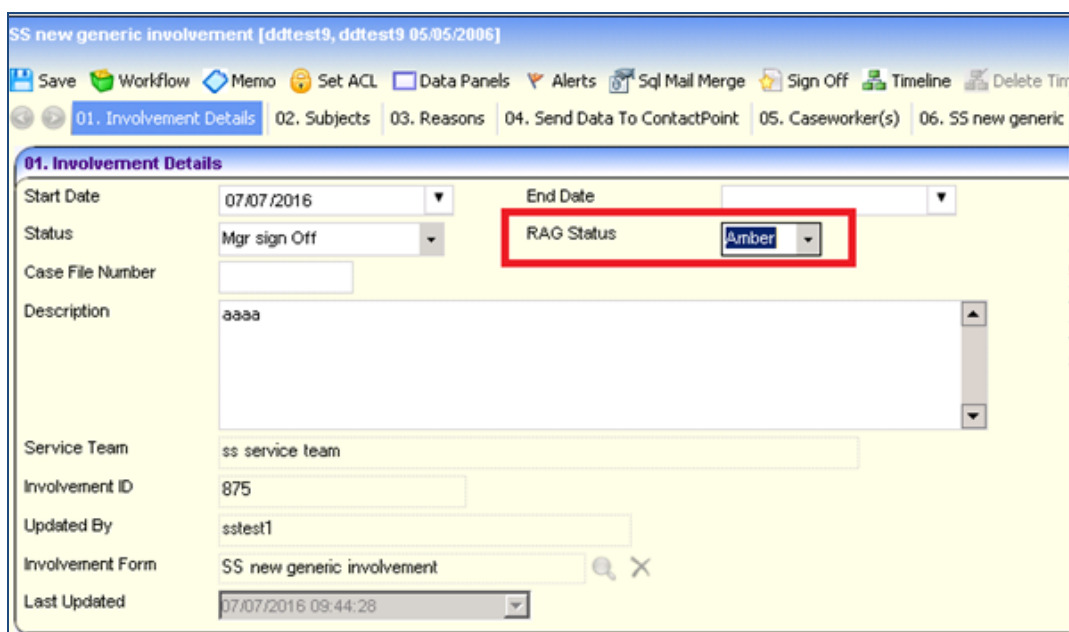
The LA defines its own business rules for red, amber and green.

The **RAG Status** field is turned on via **Tools | Administration | System Administration | System admin | System** defaults. You do <u>not</u> have to set a RAG Status.

This information is displayed on the **Home page | My Involvements** panel.

The values defined on the **Involvement Form Type** are then available for selection only on Generic CSS Involvements. Users also have the option to leave this field blank.

It is possible to group Involvements by **Status** on the **My Involvements** panel on the **Home** page. This will help track workload and provide a simpler view of Involvements based on statuses.

The **My Involvements** panel on the **Home** page has also been updated to include a **RAG Status** column and **Lead Caseworker** column. The values shown in these two new columns are taken from what is recorded on the Involvement.

It is also possible to group Involvements by status on the **CSS Service Team's Workload** page via **Focus | Services | CSS Service Teams**.

The involvement status groupings are set via the Online **System Administration** module, under the **System defaults** settings. The statuses should be added as a pipe delimited list (separated using the **|** vertical bar character).

The groups are sorted on the **My Involvements** panel by the order specified in this list. If an Involvement does not have a status that is defined in this list, it will then appear in a group named **Other** at the bottom of the **My Involvements** panel.

These System defaults can also be defined in the **v3 System Administration** module in the **LA Defaults** tab.
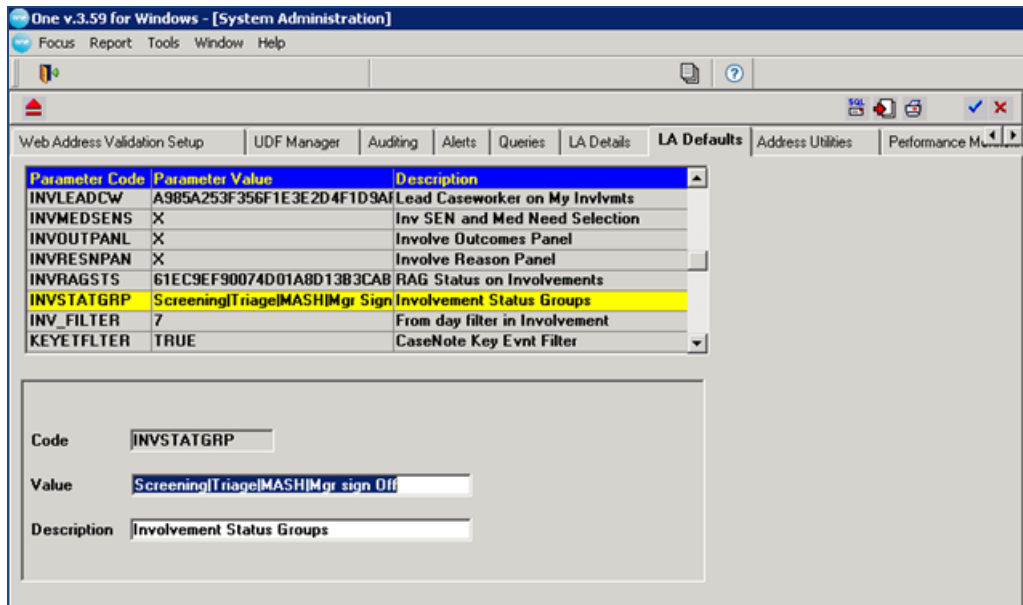
CSS/SEN Spring 2016 Release (3.59)

New Features

For the One Spring 2016 Release (3.59), a set of enhancements have been introduced to CSS, in the v4 Client, in the following areas:

- Setup
- Casework functionality
- Usability.

This means that there will be some parts of activities, case notes and involvements where CSS in the One v4 Client will have enhanced functionality, and CSS in One v4 Online and the One mobile caseworker app will not. We will consider addressing this in future releases.

Note: As part of the new functionality delivered in this release, there are some enhancements to the chronology table. These changes mean that on implementing the One Spring 2016 Release (3.59), the layout of the columns in the chronology will revert to the default arrangement. Once 3.59 is implemented, the columns can be rearranged and the system will remember the new arrangement.

Full details of these enhancements can be found in the One v4 Client help file.

Improved Setup Enhancements

Ability to Make Involvement Form Fields Mandatory

In the One v4 Client, individual fields on activities and involvement forms can be set as mandatory via **Tools | Set Mandatory Field | Mandatory Field Admin**.
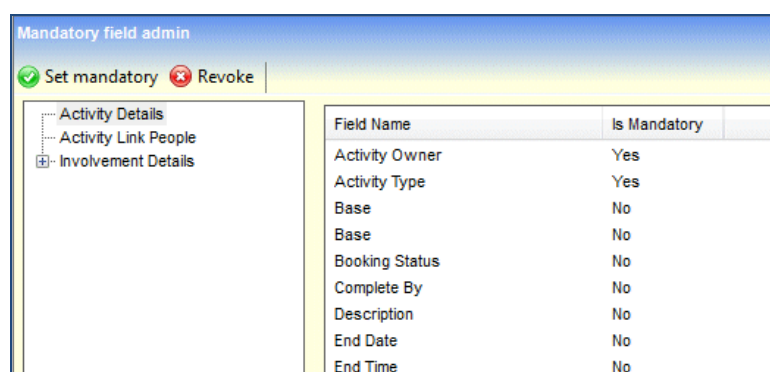
When an involvement or activity is saved, One checks that the mandatory fields are completed. If they are not, a validation message is displayed.

Note: The implementation of this functionality is controlled by a parameter in **One v4 Online** via **Administration | System Admin | System Defaults** called CCSFIELDOV.

Casework Enhancements

Other Professionals Panel in Generic Involvements

In the Education, Health and Care Plan (EHCP), there is a panel to record professional contacts. For example, health workers involved with a child, who may not otherwise be recorded in One.

All of the information in this panel, except the print flag, has been implemented for generic involvements.
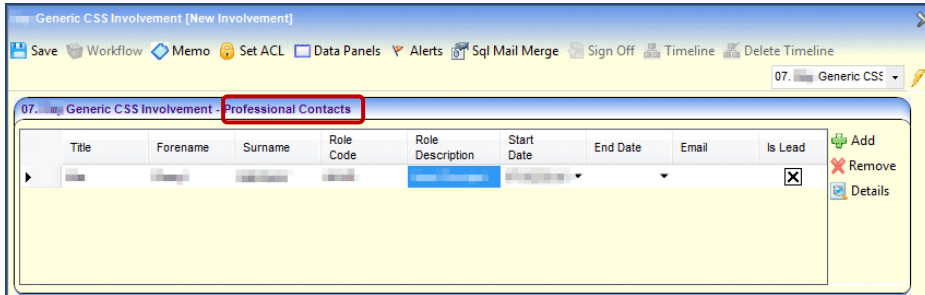
Workflow Messages Available Against Involvements

For communication logs, activities or involvement forms in the v4 Client, a user can now create a workflow item and assign it to a user or post. The item displays in the **My Workflow Messages** section of the **My Home Page**.

A workflow item is created by clicking the **Workflow** button at the top of the page on an activity, communication log or involvement.
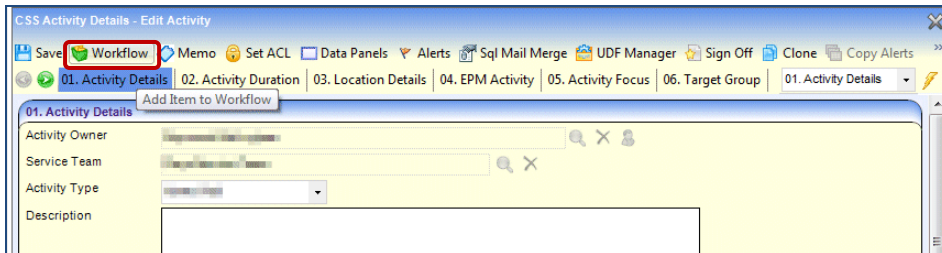
A message up to 4,000 characters can be entered.
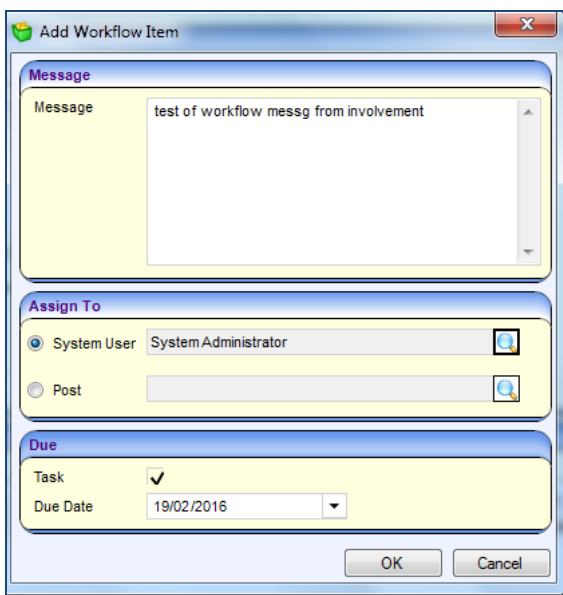
The workflow item can be assigned to a system user or a post.

Options are available to assign the message as a task and to set a due date.

Once you have assigned the workflow item, it displays on the user's **My Home Page | My Workflow Messages** section as a hyperlink to the relevant record.
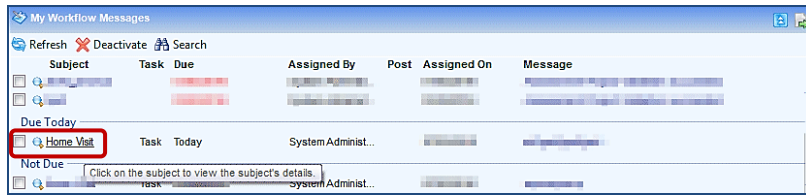
Note: The implementation of this functionality is controlled by a parameter in **One v4 Online** via **Administration | System Admin | System Defaults** called CSSWORKFLW.

Electronic Sign-off

New functionality is available to sign off involvements, activities and communications logs. Signing off locks the involvement, activity or communication log, and records who signed it off and when.

Permissions to sign off the activity, communication log or involvement are granted via **Tools | Permissions | User Group Permissions | All Secured Services |** *Activity/Communication Log/Involvement* **| Sign off the** *Activity/Communication log/Involvement*.

An activity, communication log or involvement is signed off by clicking the **Sign Off** button at the top of the relevant page.
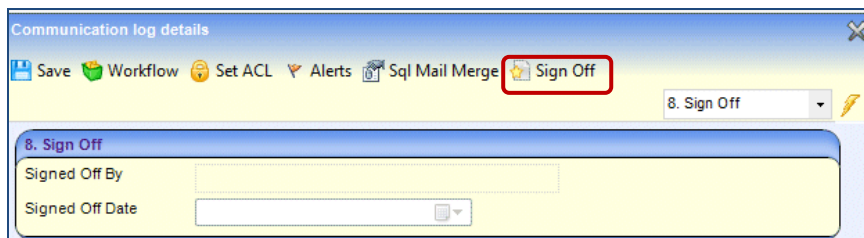
Once an involvement, activity or communication log is signed off, the **Sign Off** button changes to a **Remove Sign Off** button and the **Signed Off By** and **Signed Off Date** fields are automatically populated.
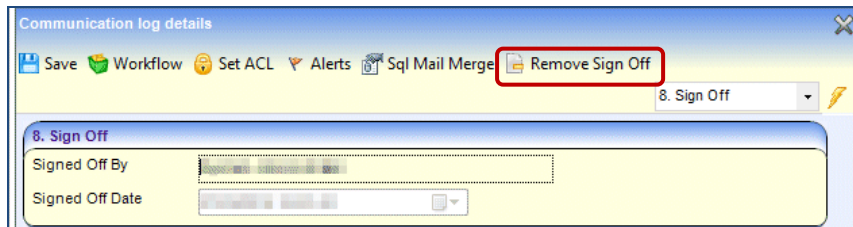
Permissions to unlock the activity, communication log or involvement are granted via **Tools | Permissions | User Group Permissions | All Secured Services |** *Activity/Communication Log/Involvement* **| Unlock the** *Activity/Communication log/Involvement*.

Signing off and removing sign off is recorded in the **user_activty_log** table. This information can be retrieved using an SQL query or a report can be created.

Note: This functionality is controlled by a parameter in **One v4 Online** via **Administration | System Admin | System Defaults** called CSSSIGNOFF.

Ability to Mark Case Notes as Key Events and View Information in the Chronology

An officer is now able to mark a case note as a key event, by selecting the **Key Event** check box on the **Case Note** panel.
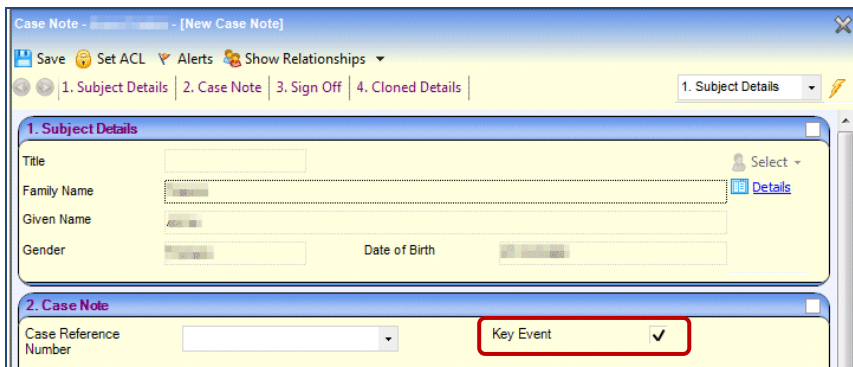
The key event information is included in the list of case notes. This enables the user to view only key event case notes or all case notes.

If a case note is marked as a key event, this information is displayed on the chronology.

Note: The implementation of this functionality is controlled by two parameters in **One v4 Online** via **Administration | System Admin | System Defaults** called KEYEVTFELD and KEYETFLTER.

Birthdays Displayed in Chronology

The chronology now displays a person's birthday as a chronology entry. This places the chronology into context with the person's age. When viewing the chronology, the birthdays shown are those within the time interval selected, up to the person's 18th birthday.

Note: The implementation of this functionality is controlled by a parameter in **One v4 Online** via **Administration | System Admin | System Defaults** called NWENTCHILD.

Usability

Case Note Event Types in Alphabetical Order

When creating a case note, the **Event Type** is selected from a drop down list. This list is now sorted in alphabetical order.
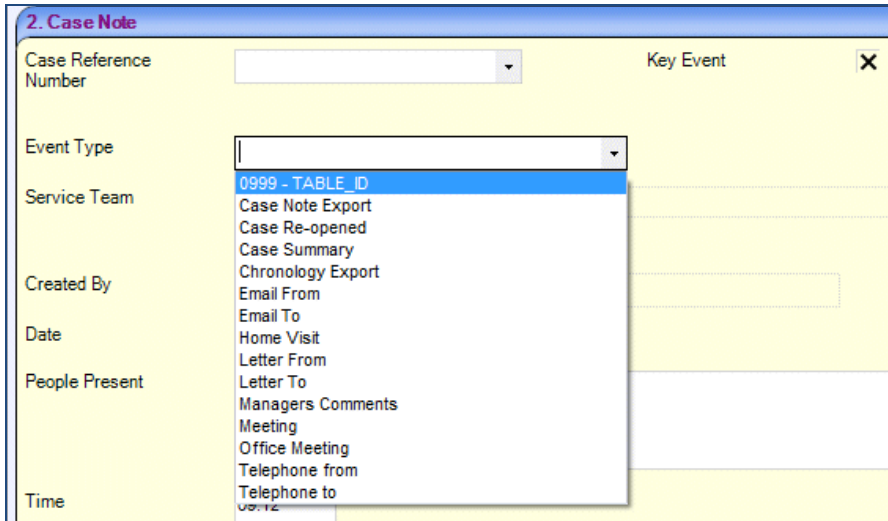
Note: This functionality is controlled by a parameter in **One v4 Online** via **Administration | System Admin | System Defaults** called EVTTYPALPH.

Linked File Indicator on Case Note Summary and Chronology

An indicator on the **Case Note** panel shows whether a case note has a linked file associated with it.
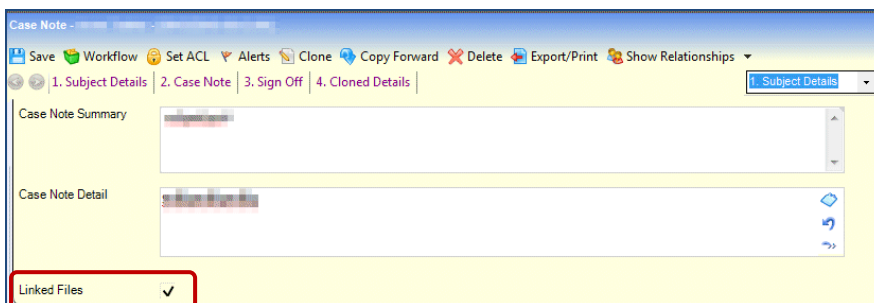
The **Linked File** indicator is also shown as a column in the chronology.

The implementation of this functionality is controlled by two parameters in **One v4 Online** via **Administration | System Admin | System Defaults** called LINKFILCOL and CASLINKFIL.

Hazards and Risks Displayed in One Place

The **Hazards** panel is now available on the **Student Details** and **Person Details** pages to display and edit hazard information that is already present on the **ICS Person Details** page.
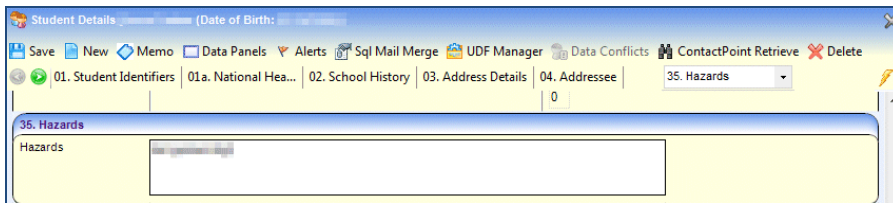
In addition, the **Risk** link, in the **Links** panel, that is already present on the **Person Details** and **Student Details** pages, is now available in the **Links** panel on the **ICS Person Details** page.
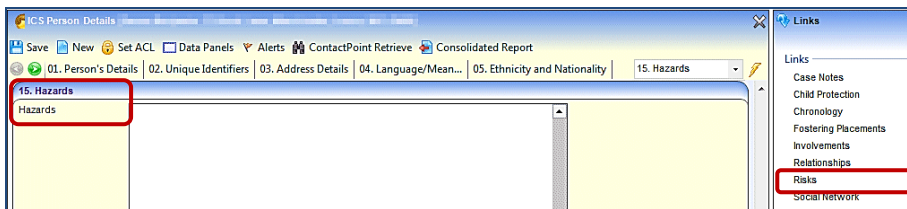
All risks and hazards are now displayed in one place, rather than across multiple pages, in any of the **Student Details**, **Person Details** or **ICS Person Details** pages.

Note: The implementation of this functionality is controlled by two parameters in **One v4 Online** via **Administration | System Admin | System Defaults** called PERSTUDHAZ and ICSPERRISK.

CSS/SEN Autumn 2015 Release (3.58)

Introduction

The One Autumn 2014 Release introduced a **Delete** button, so that if a service team had been created in error and had no records attached to it, it could be deleted.

The One Autumn 2014 CSS_SEN product notes stated that if the service team had dependent records then these could be removed or reallocated to another service team. But records, such as involvements, can only be reallocated to a post within the <u>same</u> service team.

Deleting a Service Team

In order to delete a service team, permissions must be granted via **Tools | Permissions | User Group Processes | CSS Administration | CSS Service Teams Administration**.

As a service team can only be deleted if it has <u>no</u> records attached to it, a user who has been granted permissions to delete a service team, will have the ability to remove any dependent records from the service team so that it can be deleted.

When a service team is deleted, it is recorded in the audit trail via **Tools | Audit Trail**. Deleting a service team should only be done in accordance with the local authority's policies and processes (e.g. Data Retention).

For full details on how to delete a service team, refer to the v4 help file.

CSS/SEN Summer 2015 Release (3.57)

New Functionality

Case Notes - Service Team

From the One Summer 2015 release (3.57), **Service Team** is now a mandatory field when adding a case note. This enables the CSS/SEN user or the CSS/SEN Administrative Office to obtain a better understanding of the owner of the case note.

Case notes for CSS and SEN are used to record details of events, meetings and communications between people.

Case notes can be added by various professionals who are also One users. A case note displays which service team it relates to and provides details of who created the case note.

Access to the **Case Notes** functionality for CSS and SEN is via the **Chronology** link in the **Links** panel.

CSS/SEN Spring 2015 Release (3.56)

CSS/SEN

KB406107

Provisions 'Charge Type Enquiry' window unsorted and unpopulated when first entering the screen

The **Charge Type Enquiry** window now is sorted by **Description**, then **Charge Type**. Also, all active charge types are now displayed automatically when first entering this screen.

CSS/SEN Autumn 2014 Release Service Pack 1 (3.55.100)

Introduction

This service pack is available on **My Account | Resource_ID 23878**.

SEN

KB406609 (3.55.001)

Cases that begin as an assessment for a statement but receive an EHC plan: Recording cases where an assessment has been started under the Education Act 1996 and, through agreement, ended with an EHC plan under the Children and Families Act 2014.

From September 2014, a new Code of Practice came into force which changed the timeframes for assessments. The transitional arrangements documents set out that Local Authorities who are undertaking SEN assessments which are not complete before 1st September 2014 can issue an EHCP at the end of the assessment, rather than issuing a statement. We have had confirmation from the DfE relating to their requirements for this in the SEN2 statutory return, which is as follows:

- If the EHC plan is issued under the circumstances above, then it is considered a new EHC plan and should be recorded in item 2 of the return appropriately (if completed in the 2014 calendar year).

- With regard to whether the plan is issued within the required timescales; for these cases the time scales and exceptions will apply as for statements under the Education Act 1996 (26 week time limit). However, these cases should be recorded in item 4 of the return (EHC plans). The exceptions will apply as for statements and they can be recorded as having met the time limit for an EHC plan if they have met the time limit for a statement in these cases (26 week time limit). Please make a note in COLLECT of the number of these types of cases.

In order to prepare for making this change in the SEN2 statutory return, this hotfix adds the following new code to the lookup tables 0316, 0317 & 0318 (relating to the "exceptions" fields in the SEN and EHCP assessment forms).

Ext. Code	LOOKUPS_FULL (30 Characters are allowed)	LEATABLE_FULL
M	Assmt m'd to EHCP from Sept'14	Assessments moved to EHCP from September 2014

When recording this situation, users should create a new EHCP assessment involvement for the child, backfill the information from the SEN assessment involvement, and add the new Exception code to the relevant Exception field on the EHCP assessment involvement (dependent on which phase in the assessment the change takes place). They should then delete the initial SEN assessment involvement. This will allow the statutory return to pick up the correct information and correctly calculate the SEN2 results.

KB406948 (3.55.005)

The DfE have made further late changes to the SEN2 Specification. These changes are reflected in the SEN2 report functionality in Capita One in this service pack.

For further information on these changes, see the *V4 SEN2 2015 - Business Rules and Exception Messages* document, included in the documentation for this service pack.

KB407300 (3.55.012)

Note: Hotfix 3.55.012 superseded hotfix 3.55.009

We have identified several issues within the SEN2 return which might result in incorrect results throughout the return. These incorrect results occurred because of late changes to the return made by the DfE.

If you have already submitted your return to COLLECT, there is a chance that the answers are incorrect.

The updated business rules to accommodate these changes can be found in the [v4 SEN2 2015 - Business Rules and Exception Messages](#) available from http://www.onepublications.com/447893/.

CSS/SEN Autumn 2014 Release (3.55)

New Functionality for CSS Users

The changes in CSS for the One Autumn 2014 Release (3.55) are detailed below.

Online Users can see Activities Relevant to their Base

When viewing activities in CSS v4 Online, school users are now able to stay up to date with the work being done by the Local Authority for their pupils.

A new check box, **Is Online User**, has been added to the **Post Definition** page. If the users assigned to the selected post need to view activities that are related to their base in CSS V4 Online, this check box should be selected.

NOTE: Users who belong to the selected post must be mapped to a person <u>and</u> a base in v3.

Activities are accessed via the **Links** panel (Student, Person or Involvements) or via **Home Page | My Activities**. The **CSS Activity Details** page has a new panel called **Visible To Online Users**, which allows the Local Authority user to specify whether they would like the activity they are creating to be visible online for users at the base they have selected.

NOTE: If an activity is set to be visible online for a specified base, then any linked documents and linked activities will also be visible online. This means that only information relevant to the base should be included.

When the user at the specified base logs in to CSS v4 Online, activities that have been set to visible online for their base are displayed.

The following permissions, via **Tools | Permissions | User Group Permissions** are required for the online user to see activities relevant to their base in CSS Online:

      All Secured Services | Activity | Get Activity Tasks

      All Secured Services | Activity | Get Activity Details

      All Secured Services | Activity | Get the list of sites for base

      All Secured Services | Activity | Get EPM Activities

      All Secured Services | Activity | Get Activity Type Lookups

      All Secured Services | Activity | Get Calendar Person Details

      All Secured Services | Activity | Get Activity Target Group

      All Secured Services | Activity | Get Focus

      All Secured Services | Activity | Get Activity Support Code

      All Secured Services | Activity | Get Basic details of the Linked People

      All Secured Services | Activity | Get the list of Originators

      All Secured Services | Person | Search Person, gets Person Collection

      All Secured Services | CSSServiceTeam | Get CSS Service team details

      All Secured Services | BinaryDocumentHandlerService | Get Binary Documents

      All Secured Services | Utilities | Log out and Delete the session created in Session Server

      All Secured Services | Utilities | Login to the application server from the online system

      All Secured Services | Utilities | Get the Data group permission for the specified entity

      All Secured Services | Utilities | Get the LA default values

      All Secured Services | Utilities | Read the settings for the application server operation

      All Secured Services | Utilities | Get the Data Group Permissions for a specified entity

      All Secured Services | Utilities | Validate the current session

In **Tools | Permissions | User Group Processes | Main Business Process | Administration**, the **Linked Documents** permission should be set to **Read**.

Business Process Permissions for Case Notes and Chronology

Permissions can now be set for the **Case Notes** and **Chronology** business processes via the **User Group Processes Editor**.

To assign permissions to user groups for the Case Notes functionality, select **Tools | Permissions | User Group Processes | Main Business Processes | Case Notes**.
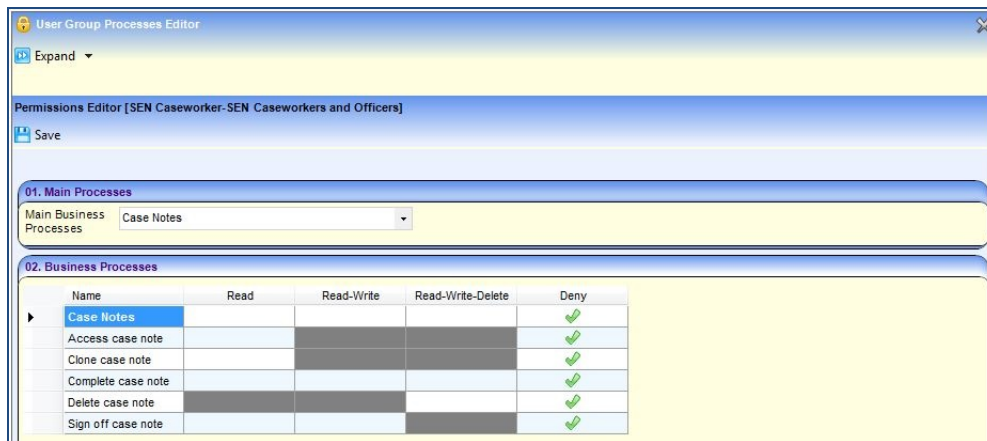
To assign permissions to user groups for the Chronology, select **Tools | Permissions | User Group Processes | Main Business Processes | Chronology**.
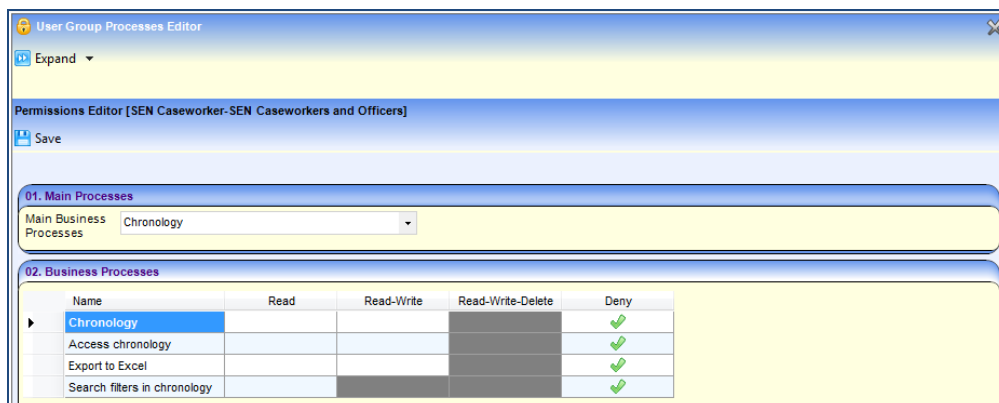
Deleting a Service Team

New functionality has been added to One v4 which allows a service team, which was created in v4 without any dependant records attached, to be deleted. This functionality is intended to enable the deletion of service teams created by mistake or which were never used.

Establishments will not be deleted as they can be used by multiple service teams.

It should be noted, that if the **Service Team Administration** window is opened prior to a service team being deleted, and then the user saves the service team record after the delete, that a new service team, with the same name but a separate ID, will be created.

This means ACLs, or anything similar referring to the previously deleted service team, will not link to the new service team. If this does occur, however, the new service team can easily be deleted as it will not have any records attached to it.

Changes in the One v4 Client
To incorporate this new functionality, the following changes have been made.

- A **Delete** button is now available via **Focus | Services | Service Team Administration.** It is only visible if the user has permission to delete a service team.

- The following three new permissions are available via **Tools | Permissions | User Group Permissions | All Secured Services | CSSServiceTeam**:

  o   Delete Service Team References

  o   Get Details of Service Team References

  o   Get Service Team is Migrated from V3.

- To allow users to delete service teams, the access level against **CSS Service Team Administration** should be set to **Read-Write-Delete** via **Tools | Permissions | User Group Processes | Main Business Processes | CSS Administration**.

- Dependent records are any record that is linked to the Service_ID for the service team that is being deleted. Commonly used examples are activities, involvements, provisions and communication logs. Clicking the **Delete** button on the **Service Team Administration** screen displays a confirmation dialog listing records associated with the service team.

A service team can only be deleted when the **Number of Attached Records** is 0, showing that no dependent records of that type are linked to the service team. **Number of Attached Records** includes records which are in any status (e.g. closed or inactive records).

Where records are attached to a service team that users wish to delete; if One already provides the option to delete the record or re-allocate it to another team, then that functionally may be used to remove the dependent records from the service team so that it can be deleted.

However, deleting or reallocation should only be done in accordance with the LA's policies and processes (e.g. Data Retention).

- When a service team is deleted it is recorded in the audit trail via **Tools | Audit Trail | Audit Trail**. The audit type is deleted and the Full Form Title will be **CSS ServiceTeam Summary.** Double click on the row to open the **Audit Details** screen which displays the following values from the service team:

  o   Service Team Name

  o   Exclude Involvement from CSS/SEN Summary Reports by Default

  o   Send To ContactPoint

- o ContactPoint Sensitive Service

- o Service Type

- o Organisation Name

- o Lookup Values (if they were populated on the **Service Team Administration** screen)

- Several warning messages have been included to guide users deleting a service team.

  - o If a user attempts to delete either the SEN (ID - 9999999999) or Exclusions (ID - 9999999998) service teams, the following warning message displays:
    This is a unique seeded service, therefore it cannot be deleted.

  - o If a user attempts to delete a service that was migrated from v3, the following warning message displays:
    This is a service which was migrated from v3, therefore it cannot be deleted.

  - o If a user attempts to delete a service team that still has dependent records attached the following warning message displays:
    A service may only be deleted if it has no dependent records.

- Where a deleted service team is mentioned in another service team's ACL, the ACL is updated for the remaining service team's records and the cascade functionality for the service team defaults continues to function.

SEN Needs Code Changes

BESD TO SEMH Code Change

In the One Summer 2014 Release Service Pack 1 (3.54.100), the following SEN Needs code was added to Table_ID 0123:

   SEMH - Social, Emotional and Mental Health.

From September 2014, the DfE have advised that **BESD – Behavioural, Emotional and Social Difficulties** is no longer a valid external code for new cases of SEN. Therefore, the **BESD** code has been removed from the **LOOKUPS_FULL Table_ID 0123**.

When creating new internal codes, it will no longer be possible to choose this external code.

In the One Autumn 2014 Release (3.55), all lookups with an external code of **BESD** have been updated to have an external code of **SEMH**. However, the description has not been changed. This means that historic records of BESD will remain with the description that was originally assigned to them. However, these records will export in statutory returns as though they are SEMH records.

The DfE have advised that children who were previously categorised as BESD should be moved to one of the other SEN Needs codes. Local Authorities (LAs) have until December 2014 to make this change.

As the codes are not like-for-like and LAs may choose to re-categorise children who were previously on BESD codes, no automatic update has been applied to internal codes, and LAs will need to manually update these records, as appropriate. However, if the LA does not update the codes, existing BESD records will export in statutory returns as SEMH records.

For clarity of recording, all currently active children with an SEN Need description of **Behavioural, Emotional and Social Difficulties** (where the external code will have been updated to SEMH) should be manually updated with a valid statutory SEN Need description, e.g. **Social, Emotional and Mental Health** or another Need if this is more appropriate after assessment.

IMPORTANT NOTE: This DfE change will have an impact on B2B, if SIMS and One are not at the most recent release. The BESD code has been removed from the external One tables and so any records containing BESD codes being received through B2B from SIMS will be rejected and an error log will be created. The BESD code in SIMS was made inactive in the summer release. Therefore, if SIMS schools are up to date, they will not be sending this code via B2B.

If you have a recurrent problem with SIMS schools sending BESD codes following the upgrade, a report is available from the SIMS service desk for SIMS schools to identify these children in order that they can update their SEN Needs code to SEMH.

SEN Inactive Reason Code

The **Left Educational Setting (LES)** lookup code has been added to the **SEN Inactive Reason** (*Table_ID 0328*) for both England & Wales.

Description (LEATABLE_FULL)	Description (LOOKUPS_FULL)	EXT_CODE	INT_CODE
Left Educational Setting	Left Educational Setting	LES	LES

This lookup code should be selected for students who have left the school and the SEN/EHCP assessment is discontinued.

NOTE: This is a new code in light of SEN2 2015. Where statements have been discontinued because the student left school, this code should be used in order for SEN2 to identify them. Therefore, you may need to identify the appropriate records and amend the SEN Inactive reason code as appropriate.

Service Team ACL Defaults for Case Notes

Service team ACL (Access Control List) defaults can now be applied to Case Notes.

ACL defaults are defined for the service team via **Focus | Services | CSS Service Teams Administration**, then selecting a service team and clicking the **Set ACL Defaults** button at the top of the page.

More Information:

RG_ACL_ACL Definition on the **One Publications** website via **v4 | Reference Guides**.

The online help file contains further details.

Selecting Subjects of Involvements in Timelines

As the statutory reforms mean that a young person up to 25 years of age can have an EHCP, it is now possible to send correspondence from the timeline direct to the subject of any involvement.

More Information:

RG_Timelines_Creating a Timeline on the **One Publications** website via **v4 | Reference Guides**.

Resolved Knowledge Base Issues

KB97149

CSS v4 No Option to Delete a Service Team

New functionality has been added to One v4 which allows a service team, which was created in v4 without any dependant records attached, to be deleted. This functionality is intended to enable the deletion of service teams created by mistake or which were never used.

A **Delete** button is now available via **Focus | Services | Service Team Administration.** It is only visible if the user has permission to delete a service team.

For more information on deleting a service team, refer to the following documents available on the One Publications website:

> *SEN Service Teams section of the One SEN Handbook.*

> *RG_Services_Setting up a Service Team.*

KB402240

SEN v4/CSS v4 - v4 Client Crashes on Windows 7 When Accessing Involvements and Timelines

This issue was fixed as part of the One Summer 2014 Release Service Pack 1 (3.54.100).

This was due to the memory resources used by timelines not being released correctly, after the **Timeline** and **Involvement** screens had been closed by the user.

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

There is still a potential for out of memory issues to occur if multiple involvements and their timelines are opened by a user in one session, but only the timeline screens are closed. Memory is only released after both the involvement and timeline are closed.

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

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

KB405231

CSS/SEND Chronology Filters not Working Correctly

The **All Involvements And Referrals** filter now displays CSS involvements.
The **Generic CSS Involvements** filter now displays generic CSS involvements.
The **Legal Action Involvements** filter now displays legal action involvements.

KB403645

CSS/SEN Admin Officer and Caseworker Contacts Duplicated on Key Contacts

Previously, if a student had multiple involvements then the Admin Officers and Caseworkers would show multiple times in the **Key Contacts** panel on the communication log. This has been fixed so that the Admin Officers and Caseworkers only appear once. However, if they are only to appear once, the caseworkers must have the same **Caseworker Label** across all the involvement forms for a student.

KB405087

ChSC/SEND Date Filters are Retaining Last Date Entered, When Not Searched or Saved

Each time a user enters a student's chronology, the date criteria is reset to include up to today's date so that new information can always be seen.

KB402192

CSS/SEN Warning and Target Days are not Calculated Correctly against School Days

Previously, warning days and target days were calculated incorrectly for days that fell outside the school term dates.

Warning and target days are now calculated correctly against school days for timelines.

CSS/SEN Summer 2014 Release (3.54.202)

CSS/CSS OL/SEN

KB405559

Student names under My Involvement displaying in Forename order instead of Surname

CSS/SEN Summer 2014 Release (3.54.X07)

CSS/SEN/SEND

KB406078

Communication logs created against a student that has the same Involvement ID is displaying on the **Chronology** screen of a different person.

CSS/SEN Summer 2014 Release Service Pack 2 (3.54.200)

CSS v4

KB405640

Saving an involvement incorrectly updates Subjects Start Date to match Involvements Start Date

An issue has been identified with generic CSS Involvements. If a subject had a different start date compared to the Involvement start date then the subjects start date would be updated to match the Involvement start date. The user was not warned of this change and it occurred every time there was a difference between the Involvement **Start Date** and the Subject **Start Date**.

This issue has now been corrected so that start dates for subjects will be maintained when the Involvement record is saved.

CSS/SENv4

KB405430

Involvements created/edited in 3.54, containing Admin Officers, are not displaying in My Involvements or Workload screen

An issue has been identified where the **End Date** of an Admin Officer was being set to '01/01/0001' rather than NULL if no end date was supplied. This lead to Involvements not displaying for that Admin Officer in the **My Involvements** or **Service Team Workload** areas as the record was considered to be in the past for that Admin Officer.

This issue has now been resolved so that blank **End Dates** for Admin Officers now correctly saved as NULL values.

CSS/SEN Summer 2014 Release Service Pack 1 (3.54.100)

SEN

KB405406

Lookup Code Changes - SMEH TO SEMH

In the One Summer 2014 Release (3.54), the Department for Education (DfE) introduced the following new SEN Needs code in *Table_ID 0123*:

> **SMEH** - Social, Mental and Emotional Health.

The DfE have now changed the SMEH code to the following:

> **SEMH** - Social, Emotional and Mental Health.

The **Lookup Codes** have therefore been updated as follows:

The **LEATABLE_FULL Table_ID 0123** lookup **SMEH - Social, Mental and Emotional Health** has been replaced with **SEMH - Social, Emotional and Mental Health**.

For the **LOOKUPS_FULL Table_ID 0123,** if the external code and the internal code are **SMEH,** then the external code and description are updated with **SEMH - Social, Emotional and Mental Health**, else, only the external code is updated from **SMEH** to **SEMH.**

NOTE: The internal code is not updated; it remains as **SMEH**.

GUIDANCE: As **SMEH** code is not a valid code, please create a new internal code of **SEMH** that should map to an external code of **SEMH** via **Tools | Administration | Lookups**.

CSS/SEN

KB402240

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

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

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

There is still a potential for *out of memory* issues to occur if multiple involvements and their timelines are opened by a user in one session, but only the timeline screens are closed. As the memory used by the timeline

is only released when the involvement screen is closed, attempting to have too many involvements remaining open where their timeline windows have been opened and then closed, will continue to retain more and more memory.

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

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

CSS Summer 2014 Release (3.54)

New Functionality for CSS Users

A number of priority issues with the CSS module have been addressed in the One Summer 2014 Release (3.54).

Chronology

CSS users now have access to the **Chronology**, a powerful tool to navigate the main events in a student's history, including involvements, case notes, activities, communication log entries and Education, Health and Care Plans (EHCP).

The chronology is accessed via a student's record by clicking the **Chronology** link on the **Links** panel.

If there are existing CSS records (events) for the student, the details display in the **Chronology** grid at the bottom of the page.
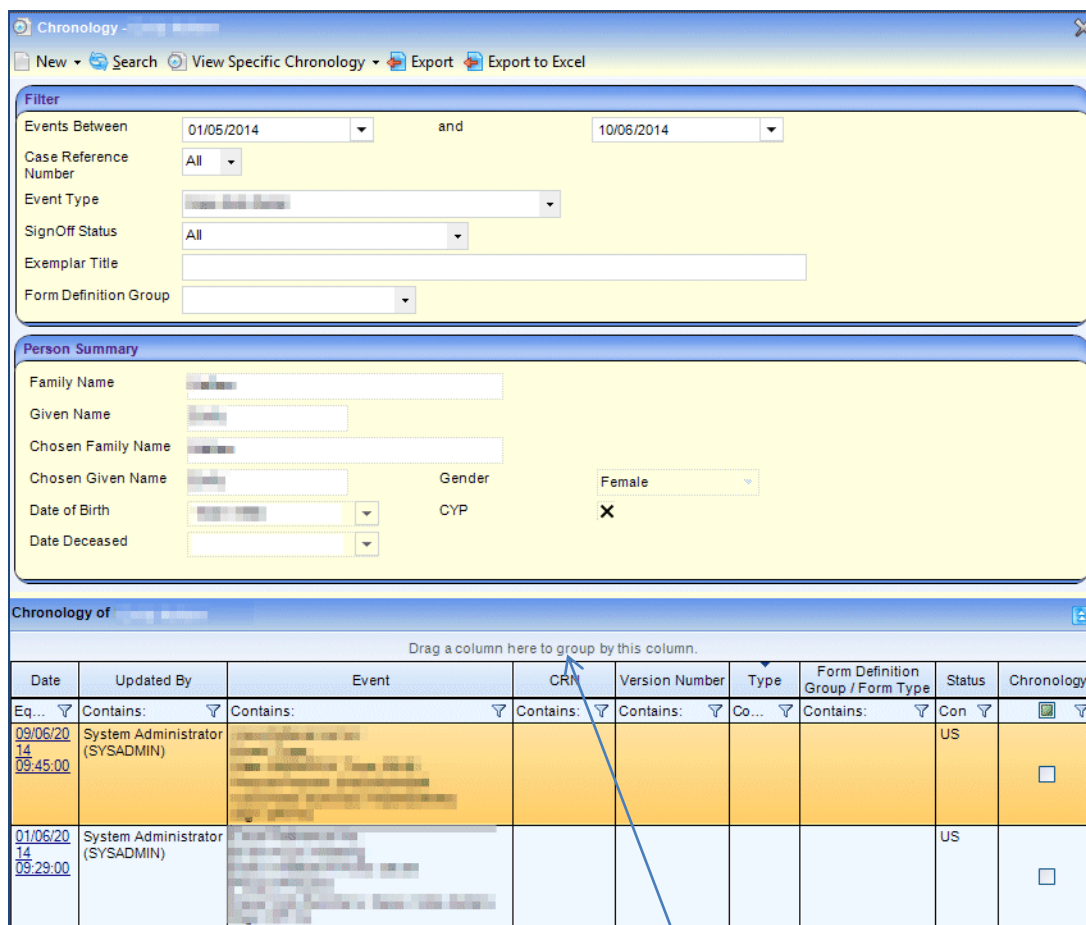
The grid also enables manipulation of data, including filtering and grouping on the screen.

Clicking the link in the **Date** column on the grid enables you to open the chronology record.

Filter Search

A student's chronology may contain many types of events. To search for an event in the chronology, select an **Event Type**, then click the **Search** button. For example, if you filter by *All CSS Involvements*, then only CSS involvements are displayed.

To narrow your search further, enter details in other **Filter** fields, before clicking the **Search** button.

Case Notes

Case notes, for example details of a meeting, can be added to a student's chronology. Case notes can be added by various professionals who are also One users.

1. **Open the student's chronology record by clicking the Chronology link in the Links panel.**

2. **Click the New button and select New Case Note.**
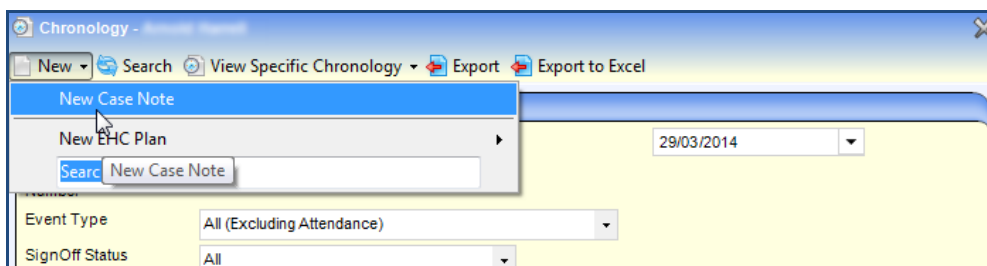
The **New Case Note** page is displayed; the **Subject Details** panel is pre-populated with the student's details. To display the **Person Details** dialog, click the **Details** link. You can add or edit the **Subject Details** here.
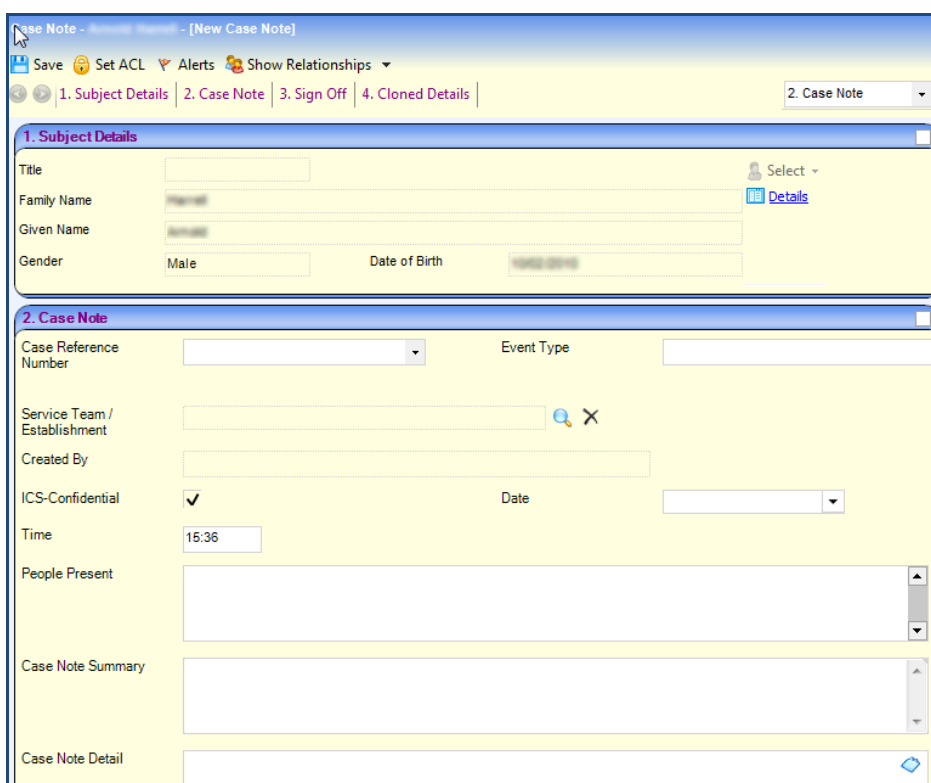
3. Enter the required **Case Note** details.

Service Team/Establishment

The **Service Team/Establishment** field reflects the service team that the user is attached to.

NOTE: For ChSC (ICS) users, the name of the establishment is displayed in this field.

ICS Confidential

The **ICS-Confidential** check box shows whether the case note is available to other One users.

If you are linked to a <u>CSS/SEN post</u> only, the check box displays as not selected and cannot be edited.

If you are linked to an <u>ICS post</u> only, the check box displays as selected and cannot be edited.

If you are linked to both an <u>ICS post</u> and a <u>CSS/SEN post</u>, the check box is selected and editable.

4. Click the **Save** button.

5. When all the mandatory fields have been completed, you can sign off the case note.

    The **Sign Off** panel is used to assign posts of One users who are responsible for digitally signing or counter signing a student's case note.
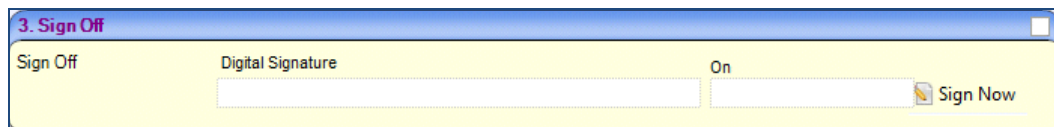
If required, click the **Workflow** button, at the top of the page, to send a message to another user for sign off.
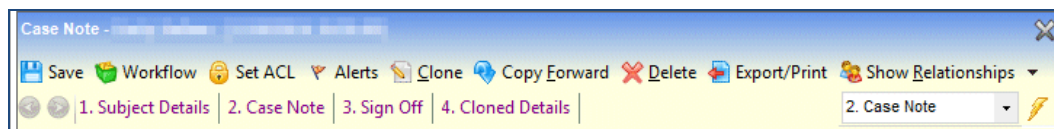
Relationships

Relationships record the associations between the subject and other members of their family.

Click the **Show/Hide Relationships** button at the top of the page, depending if you wish the relationships to be seen.

Provisions

Several changes have been made to the **Provisions** area to improve usability and flexibility of recording provision information.

- A change to the **Provision Allocation** screen makes it easier to add a student's provision. Radio buttons, enabled after selecting a **Service Team**, enable you to choose between the following two methods of recording provision:

    o **Provider and Service** – this information is defined during the **Service Provider Link** setup.

    o **Charge Type** (and **Service**) – this enables the service to be independent of an individual **Service Provider Link**. It also enables multiple provision records to be maintained in bulk.
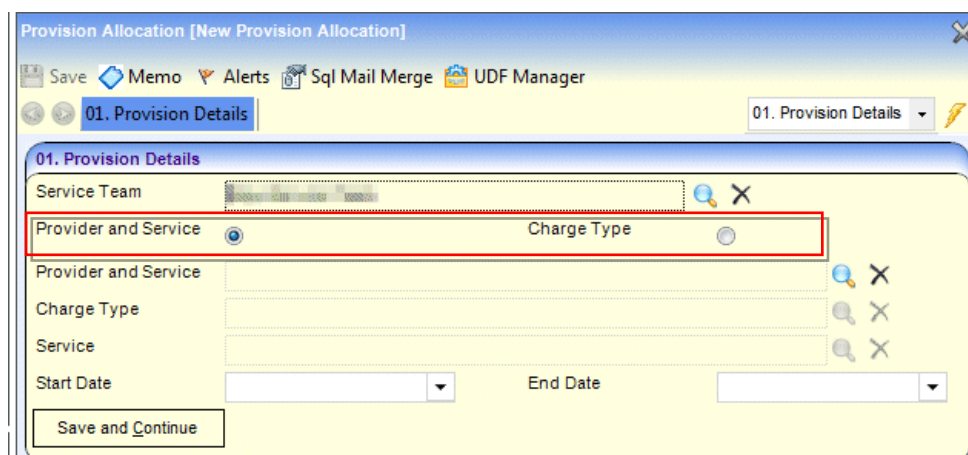
- The **Provision Allocation Details** screen has been updated to enable CSS users to record details about provisions that are personal budgets. This is particularly relevant to the new SEND legislation, but also enables other departments to identify provisions that are of a **Personal Budget Type**.

  To record a personal budget:

  1. Select **Focus | People | Student | Provision | Provision Summary** to display the **Provision Allocation Details** page.

  2. On the **Provision Details** panel, select the **Personal Budget** check box.

  3. Select a **Personal Budget Type**.

- A new panel, **Payee Details**, has been added to the **Provision Allocation Details** page to enable recording of the account details for the payee. These are not mandatory fields, but enable users to capture more detailed provision details.

- A new column, **PB** (Personal Budget), has been added to the **Provision Summary** grid. This column denotes the status of the **Personal Budget** check box. This enables the user to identify, at a glance, which provision lines are of a **Personal Budget Type**.

- The **Actual Cost** field on the **Provision Summary** screen and the **Provision Allocation** screen has been renamed to **Amount Paid**. This now reflects the functionality of this field, which updates based on the use of the **Payments** functionality in the **Provisions** area.

Timelines

An additional **Correspondence Activity | Recipient Role**, **Other**, has been added to timelines. This works specifically with EHCP involvements. CSS users are able to see this activity. However, it does not work if it is used against a non-EHCP involvement form.

Communications Log

A new column has been added to the **Communication Log** results browse. The **Multiple Recipients** column identifies when communication log items have been sent to multiple professionals.

NHS Number

A new panel, **National Health Service** (NHS) **Number**, has been added on the **Student Details** and **Person Details** pages. This is in recognition of the requirement for improved integration between children's services and health services.

The NHS number has been added as a separate panel in order that users can use panel level security to hide this information, where appropriate.

NOTE: The **National Health Service** (NHS) **Number** field validates the code against the NHS algorithm in order that users cannot enter an invalid code. It also checks the NHS number against other records within the database to ensure that the code being entered is unique.

It is also possible to use the NHS number as a search parameter within the **Student Enquiry** search and the **Person Enquiry** search.

Resolved Knowledge Base Issues

KB403473

Statement Final Date is not being shown correctly on the SEN Stage History or the Chronology

The **SEN Stage History** panel on the **Student Details** page and the **Chronology** page were previously showing the **Date of Change** date as the start date of the SEN assessment.

This has been fixed, so that the **Final Date** is used as the **SEN Stage Date of Change**.

KB403488

Chosen Name is shown instead of Legal Name on Provision Allocation Details screen

Previously, the names were displayed as follows:

> **Focus | People | Student | Provision | Provision Allocation Details [<Chosen Forename> <Chosen Surname> <Date of Birth>]**.

This has been fixed, so that the **Legal Forename** and **Legal Surname** are used on the **Provision Allocation Details** screen.

> **Focus | People | Student | Provision | Provision Allocation Details [<Legal Forename> <Legal Surname> <Date of Birth>]**.

KB404093

Audit Enquiry Panel | Results Grid returns incorrect number of results

Previously, when inputting search information into the **Audit Enquiry** panel, the results grid returned an incorrect number of results.

This has been fixed, so that the results grid returns the correct number of results.

KB404238

Updates to Timeline data not auto transferring to Oracle database

This issue has been resolved so that updates to timeline data already in the Oracle database are correctly processed via scheduled tasks.

KB404299

Unable to select all involvements and then deselect a group of involvements within the Involvement Reallocation wizard

Users can now select or deselect any number of the listed involvements when using the Involvement Reallocation wizard.

SEN Summer 2014 Release (3.54)

New Functionality for SEN Users

A number of priority issues have been addressed with the SEN module in the One Summer 2014 Release (3.54).

If you also have a CSS licence, you will also have access to the additional functionality of the Chronology and Case Notes. For more information, refer to the following sections:

Provisions

Several changes have been made to the **Provisions** area to improve usability and flexibility of recording provision information.
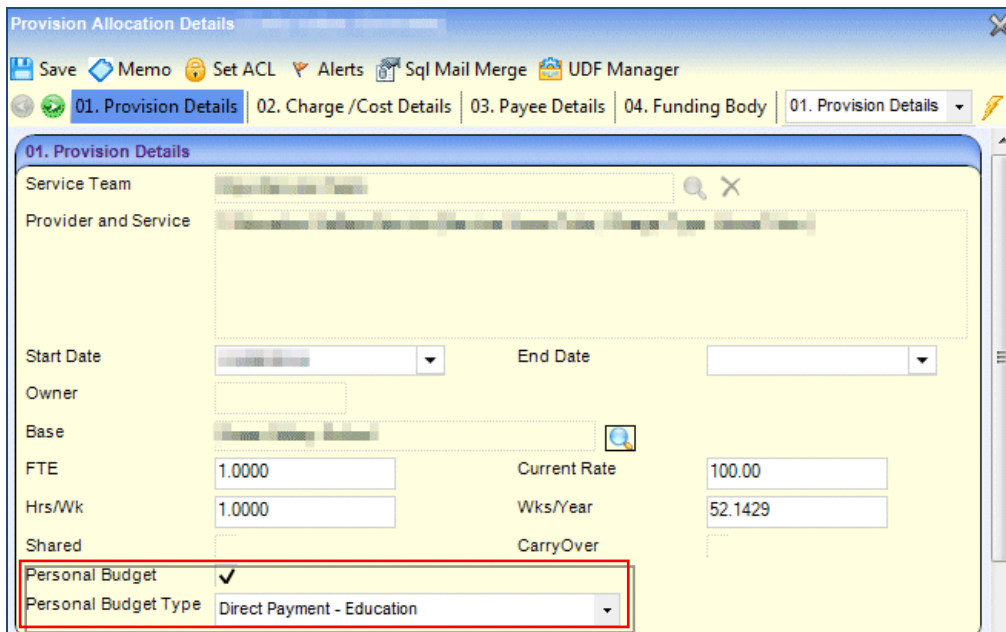
- A change to the **Provision Allocation** screen makes it easier to add a student's provision. Radio buttons, enabled after selecting a **Service Team**, enable you to choose between the following two methods of recording provision:

   o **Provider and Service** – this information is defined during the **Service Provider Link** setup.

   o **Charge Type** (and **Service**) – this enables the service to be independent of an individual **Service Provider Link**. It also enables multiple provision records to be maintained in bulk.
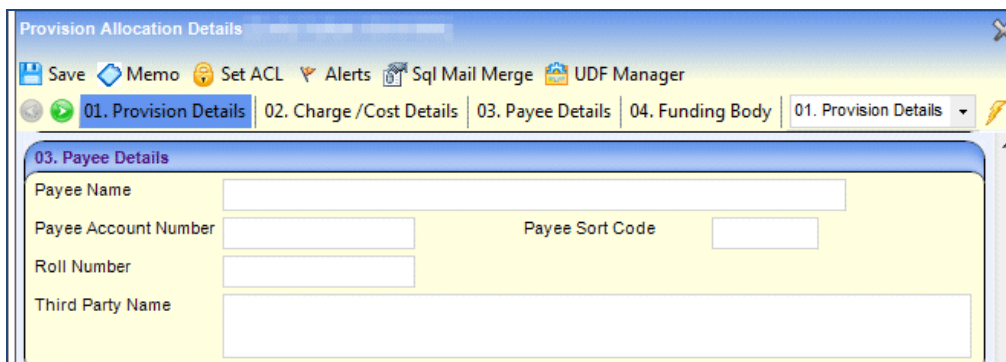
- The **Provision Allocation Details** screen has been updated to enable SEN users to record details about provisions that are personal budgets. This is particularly relevant to the new SEND legislation, but also enables other departments to identify provisions that are of a **Personal Budget Type**.

  To record a personal budget:

  1. Select **Focus | People | Student | Provision | Provision Summary** to display the **Provision Allocation Details** page.

  2. On the **Provision Details** panel, select the **Personal Budget** check box.

  3. Select a **Personal Budget Type**.

- A new panel, **Payee Details**, has been added to the **Provision Allocation Details** page to enable recording of the account details for the payee. These are not mandatory fields, but enable users to capture more detailed provision details.

- A new column, **PB** (Personal Budget), has been added to the **Provision Summary** grid. This column denotes the status of the **Personal Budget** check box. This enables the user to identify, at a glance, which provision lines are of a **Personal Budget Type**.
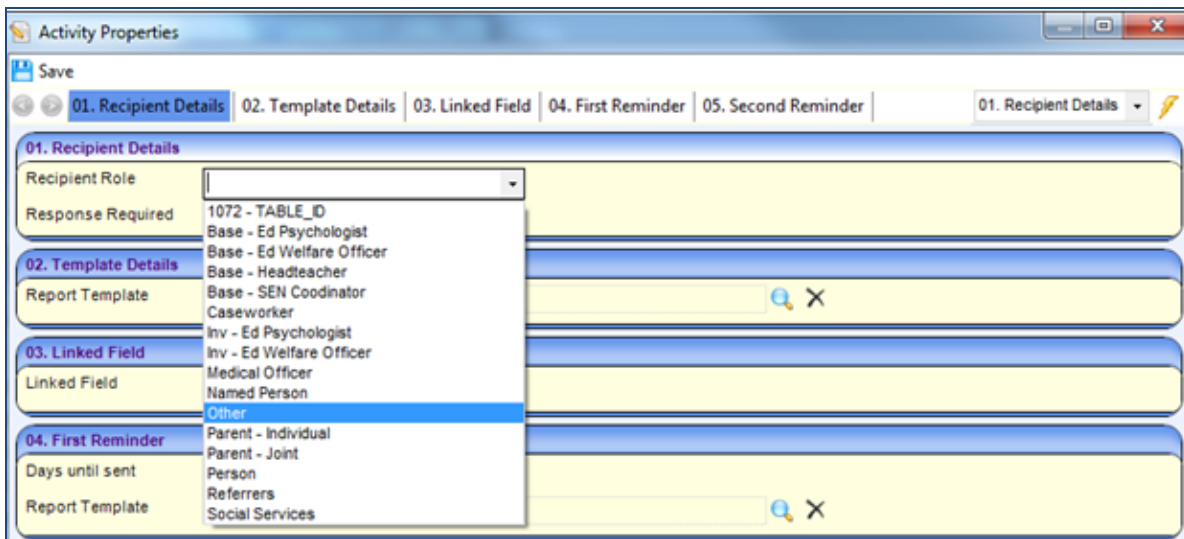
- The **Actual Cost** field on the **Provision Summary** screen and the **Provision Allocation** screen has been renamed to **Amount Paid**. This now reflects the functionality of this field, which updates based on the use of the **Payments** functionality in the **Provisions** area.

Timelines

An additional **Correspondence Activity | Recipient Role**, **Other**, has been added to timelines. This works specifically with EHCP involvements. SEN users are able to see this activity. However, it does not work if it is used against a non-EHCP involvement form.

Communications Log

A new column has been added to the **Communication Log** results browse. The **Multiple Recipients** column identifies when communication log items have been sent to multiple professionals.

NHS Number

A new panel, **National Health Service Number**, has been added on the **Student Details** and **Person Details** pages. This is in recognition of the requirement for improved integration between children's services and health services.

The NHS number has been added as a separate panel in order that users can use panel level security to hide this information, where appropriate.

NOTE: The **National Health Service** (NHS) **Number** field validates the code against the NHS algorithm in order that users cannot enter an invalid code. It also checks the NHS number against other records within the database to ensure that the code being entered is unique.

It is also possible to use the NHS number as a search parameter within the **Student Enquiry** search and the **Person Enquiry** search.

Resolved Knowledge Base Issues

KB403430

Missing Functionality to Delete a Timeline

New functionality has been added to enable users to delete a timeline from a student's involvement in both the v4 Client and v4 Online.

In v4 Client, the **Delete Timeline** button is available on the **Involvement Detail** screen for existing timelines. For a new timeline, the button is activated only <u>after</u> clicking the **Save** button to link the timeline to the involvement.

In v4 Online, the **Delete Time** button is available on the **Involvement Summary** tab for existing timelines. For a new timeline, the button is activated only <u>after</u> clicking the **Save** button on the **Select Timeline** dialog.

For this functionality to be available to users, a System Administrator must complete the following:

1. In **v4 Client | Tools | Permissions | User Group Processes | User Group Processes Editor**, select the relevant user group.
2. From the **CSS Administration** Main Business Process, set the **Timeline** Business Process to **Read-Write-Delete**.
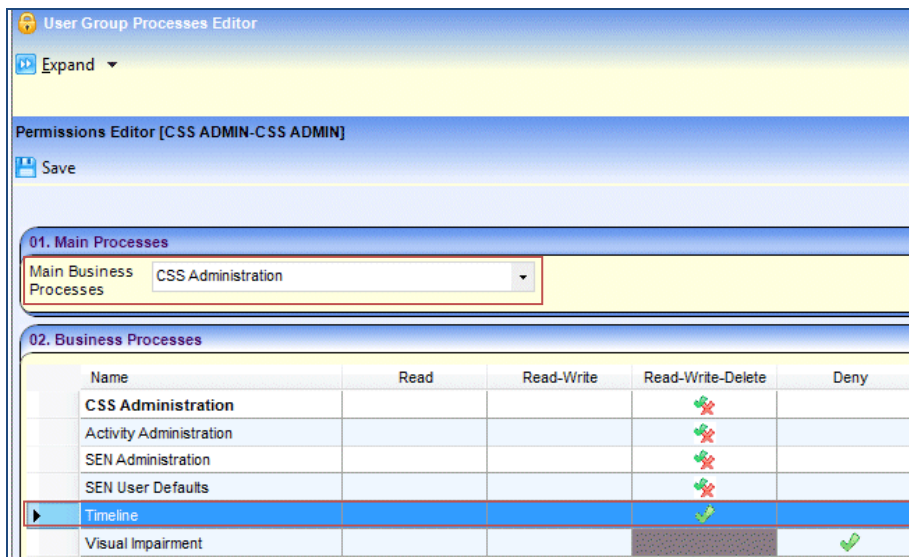
3. In **v4 Client | Focus | Services | CSS Service Teams Administration**, select the relevant service team.
4. On the **CSS Service Team** panel, select the **Timelines can be Deleted** check box.
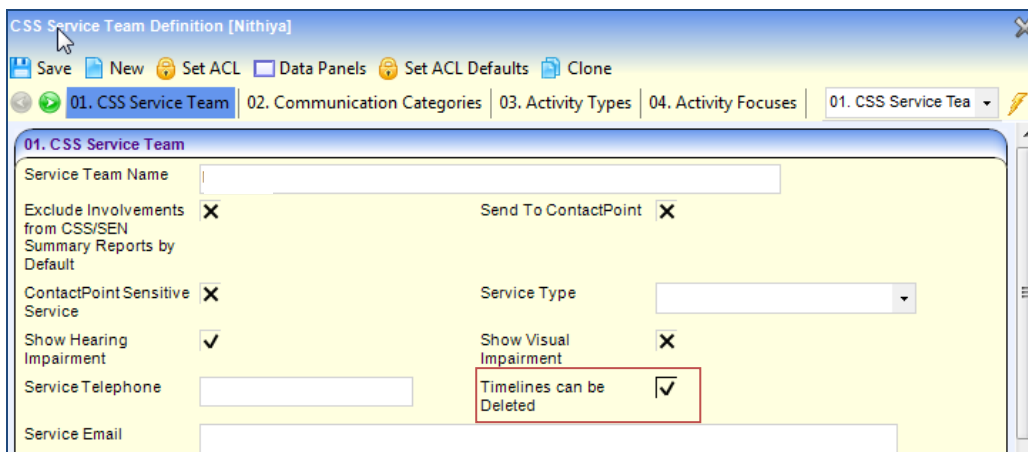
Neither of these permissions is available to users by default. If permission is granted to the user, but the check box is not selected against the service team that owns the involvement, the **Delete Timeline** button displays on the record, but it is not activated.

Clicking the **Delete Timeline** button displays the following warning message:

> Are you sure this timeline should be deleted?
> Once a timeline is deleted it cannot be retrieved. It will be completely removed from the system. However, any Correspondence or Communication items which were generated from the timeline will remain in the system.

A new timeline can be added to the involvement, but it will start from the beginning. Users will have to skip any irrelevant activities to get to the current point on the timeline.

A timeline cannot be deleted in the v4 client or v4 Online if another user has it open; a message displays advising that the record has been edited by another user so their changes cannot be saved.

Deleting a timeline that is linked to an involvement does not affect the timeline template.

KB403473

Statement Final Date is not being shown correctly on the SEN Stage History or the Chronology

The **SEN Stage History** panel on the **Student Details** page and the **Chronology** page were previously showing the **Date of Change** date as the start date of the SEN assessment.

This has been fixed, so that the **Final Date** is used as the **SEN Stage Date of Change**.

KB403488

Chosen Name is shown instead of Legal Name on Provision Allocation Details screen

Previously, the names were displayed as follows:

> **Focus | People | Student | Provision | Provision Allocation Details [<Chosen Forename> <Chosen Surname> <Date of Birth>]**.

This has been fixed, so that the **Legal Forename** and **Legal Surname** are used on the **Provision Allocation Details** screen.

> **Focus | People | Student | Provision | Provision Allocation Details [<Legal Forename> <Legal Surname> <Date of Birth>]**.

KB404093

Audit Enquiry Panel | Results Grid returns incorrect number of results

Previously, when inputting search information into the **Audit Enquiry** panel, the results grid returned an incorrect number of results.

This has been fixed, so that the results grid returns the correct number of results.

KB404112

Error: Object reference not set to an instance of an Object

Previously, when creating a new SEN Tribunal Involvement Form, the following error message was displayed:

> Error: Object reference not set to an instance of an Object.

This has been fixed, so that the SEN Tribunal Involvement Form displays correctly.

KB404290

Provision not calculating Charge/Cost Details

Previously, if a provision was created and the Start Date or End Date for that provision fell within a provision year which has not been created yet, the Provision Charge/Cost Details lines were not updated correctly, even after the provision year was created. The Provision Charge/Cost Details now calculate correctly.

KB404295

Unsaved changes message when saving a provision with UDF not null

Previously, when certain screens contained a lookup UDF, it would incorrectly warn the user there were unsaved changes even though the record had been saved. This issue has been resolved and will not display this message unless there are unsaved changes.

KB404597

Default ACL set is not filtering to Involvements

An issue existed where the ACL settings for an Involvement record were not displayed on the **ACL Settings** page. After viewing the blank ACL list, if the Involvement was then saved, the ACL for the Involvement was lost. At that point, any default ACL changes at the Service Team level would not cascade to that Involvement as its ACL was different to the existing Service Team ACL.

This issue has now been resolved and Involvement ACL will no longer be lost in this manner.

CSS/SEN Spring 2014 Release Service Pack 1 (3.53.100)

Provisions

This service pack is available on **My Account | Resource_ID 22626**.

KB404290

Purpose
CSS/SEN - Provisions is not calculating the Charge / Cost Details in specific circumstances (KB404290)

Summary
This problem occurs specifically where a provision record is created and the Start or End Date for that Provision falls within a Provision Year which has not been created in the system. If the provision year is then created the Provision Charge / Cost Details line (s) is not being updated

Advice
If the future Provision Year(s) has been created and the Provision is subsequently created with either the Start or End date falling in the future Provision Year, the system will automatically create the Charge / Cost Details Provision Line for that year.

Scenario A

If the future Provision Year(s) has not been created and the Provision is created with a Start Date in the current created Provision Year but with an End Date falling in a future as yet uncreated Provision Year, then the system will calculate and display the Charge / Cost Details Provision Line for the part of the Provision in the current year. However when the user creates the future Provision Year, the system will not automatically create the Charge / Cost Details Provision Line for the part of the Provision falling in the newly created future Provision Year.

Scenario B

If a user creates a Provision with both a Start and End Date which falls in a future Provision Year which has not yet been created, and then the user subsequently creates the future Provision Year, the system will not automatically create the Charge / Cost Details Provision Line for that Provision.

CSS/SEN Spring 2014 Release (3.53)

SEN Status Start Date Changes

Introduction

In One, there was previously no clear functionality to record a student's SEN status start date. From the One Spring 2014 Release (3.53) a new field, **SEN Status Start Date**, is available in panel 07 - **Supporting Details**.

One v3 Client, v4 Client and v4 Online have all been updated to accommodate the change. New validation rules have also been applied.

To prevent data mismatches, the process for updating existing student details has also been updated.

Changes to Historical SEN Stage Records

The new business rules state that all SEN stage history records should have a start date. Therefore, if an historical SEN stage history record does not have a start date, on upgrade an update script updates the **Start Date** field (SEN_STAGE_HIST.START_DATE) with a **Date of Change** (SEN_STAGE_HIST.COLLECTION_DATE).

User Interface Changes

One v3

Previously, when a user added an SEN status record via **One v3 | Student Details** in any module, the start date of the SEN stage history was not populated. From this release, when a user adds a new SEN status record the **SEN Stage History | Start Date** is populated with the system date.

The following business rules have been implemented:

1. When a user adds a new SEN status record in the **Student Details** screen, One adds a new record to the SEN stage history with the **Date of Change** as the system date. In this case the system date is also added as the **Start Date**.
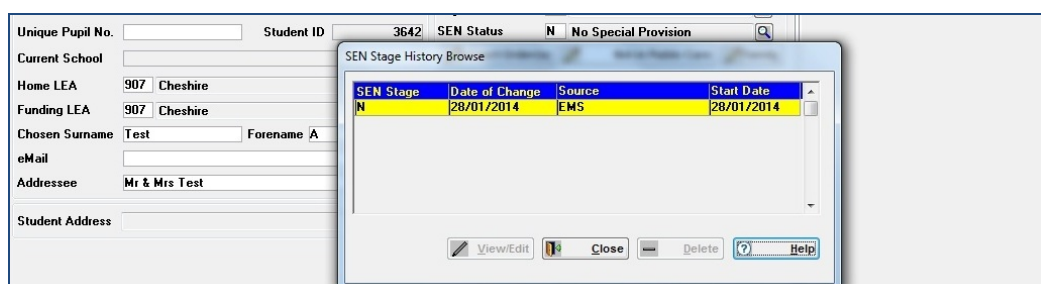
2. When adding SEN status details via **One v3 | Common Transfer File | Student Details | Common Basic Dataset | SEN Stage History Browse**, the **SEN Stage History | Start Date** defaults to the **Date of Change**.
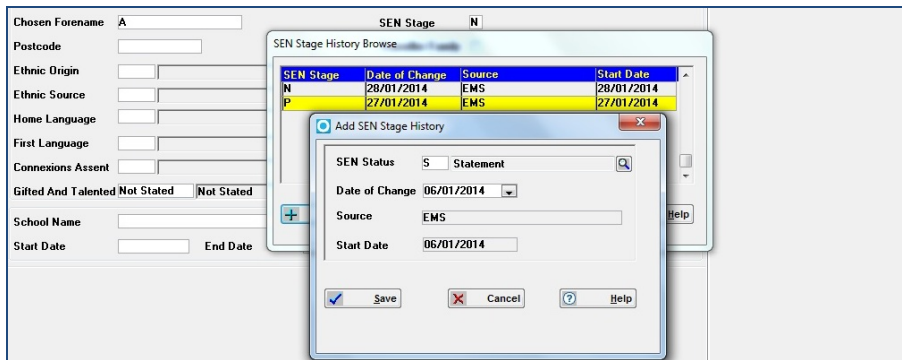
3. When updating existing SEN status details via **One v3 | Common Transfer File | Student Details | Common Basic Dataset | SEN Stage History Browse**, the **SEN Stage History | Start Date** remains unchanged.
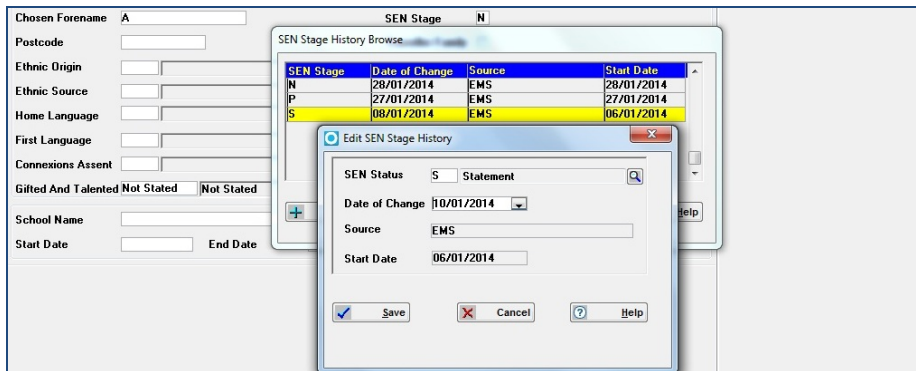
One v4 Client

In the One v4 Client, the **SEN Status Start Date** field is available via *v4 | Focus | People | Students | New Student | 07. Supporting Details*.
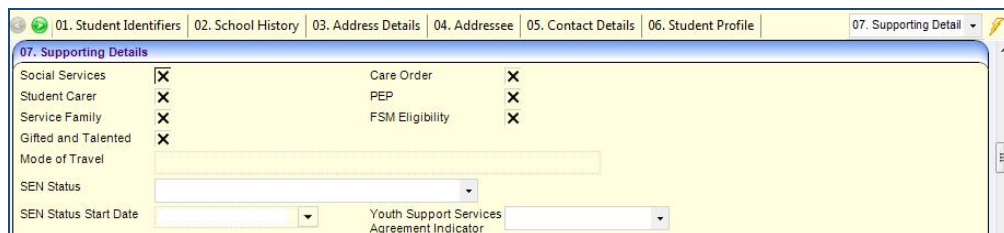
When a user selects an option from the **SEN Status** drop-down, the **SEN Status Start Date** field is enabled and is pre-populated with the system date.
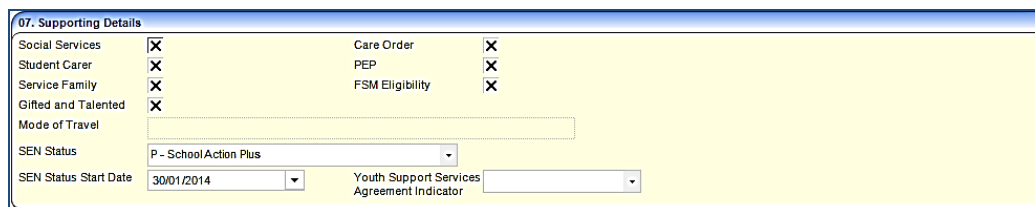
If a user selects a future **SEN Status Start Date**, One displays an error by marking the field in red and displaying the following message:

The SEN Status Start Date should not be in the future.

After saving this information with a correct **SEN Status Start Date**, the date is displayed in the **SEN Stage History** panel.

If a user tries to save a SEN status with an invalid or a null **SEN Status Start Date**, the following error message displays:

> SEN Status Start Date is invalid/NULL, SEN Status Start Date ill be saved as system date.

If user clicks the **OK** button, the SEN status details are saved with the **SEN Status Start Date** as the system date.

If user clicks the **Cancel** button, they are returned to the **Student Details** screen without saving the student details.

When the student's SEN status is derived from a SEN involvement with a **Q** or **S** SEN Status, as per existing business rules, the **SEN Status** field is greyed out and cannot be edited. The new **SEN Status Start Date** field also follows the same business rules.

All the SEN stage records in panel **23. SEN Stage History** now sort by descending order of start date.

One v4 Online (A&T Back Office)

The new date field, **SEN Status Start Date**, has been added via **v4 Online | A&T Back Office | Student Additional | Supporting Details**.

The **SEN Status Start Date** field is disabled until the user selects a **SEN Status** option. Once activated, the **SEN Status Start Date** field is populated with the system date; this date can be edited.

If a user tries to save the student details with the SEN status details, but not the **SEN Status Start Date**, the following error message is displayed:

> Not all mandatory fields have been populated: SEN Status Start Date.

If a user tries to save the student details with a future date, the following error message is displayed:

> The SEN Status Start Date should not be in the future.

After saving these record with the correct details, the **Special Needs | SEN Stage Details** panel displays the **Date of Change** field as the system date and start date as the **SEN Status Start Date**.

Resolved Knowledge Base Issues

KB400942

Activities From Date Field Within Service Team Workload Has No Default Parameter

The default **From Date** for displaying activities is now configurable. This operates in a similar way to the **INV_FILTER** for involvements.

This functionality has been added to the following areas:

- v4 Client | Focus | Services | CSS Service Teams Workload | Activities.

- v4 Online | CSS | Team Workload | Activities.

A new parameter, **ACT_FILTER**, has been created and defaults to 7 (days). This can then be viewed or changed via **v3 | Tools | System Administration | LA Defaults**.

After the upgrade to the One Spring 2014 release (3.53), the **From Date** field will be today's date minus the ACT_FILTER and the **To Date** field defaults to today's date.

KB402621

Correspondence Address Items Available for Involvements in Quick Reports

A quick report data item for **Correspondence Address** (@CORRESPONDENCEADDRESS) is now available on the **Involvement** screen. This enables quick reports to be used as letters against a CSS or a SEN Involvement form.
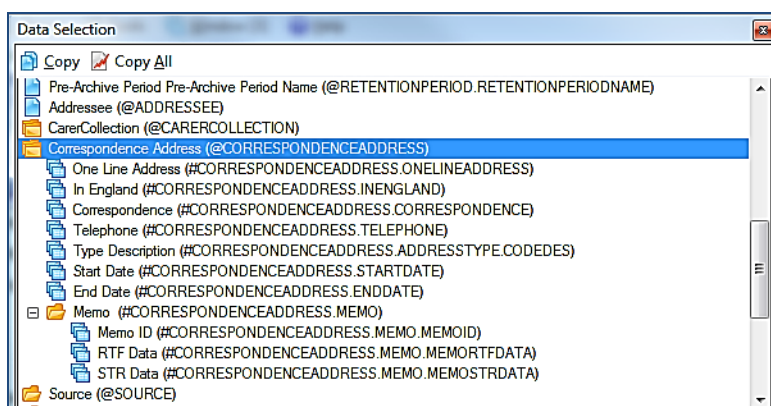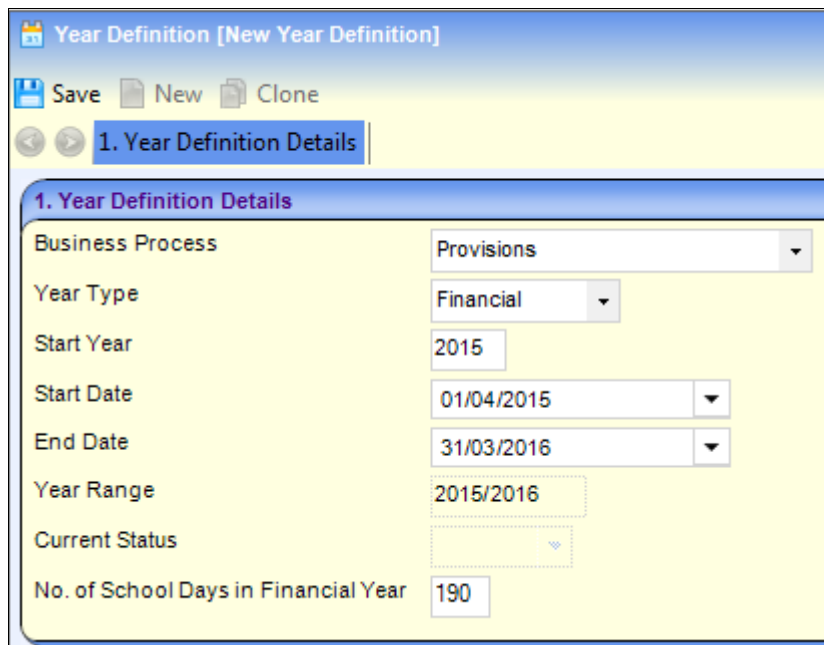
KB402550

No. of School Days in Financial Year Field Added to Year Definition Details

Tools | Year Settings | Year Definition

To help produce more accurate calculations, a new field, **No. of School Days in Financial Year**, has been added to the **Year Definition Details** tab for years with a **Business Process** of **Provisions** and **Year Type** of **Financial**.

This number is used in relation to calculations performed by the **Annual School Census** process.

Previously, calculations were based on the following period allocated calculation:

(School Days covered by provision) / (190 days)

The new calculation is:

(School Days covered by provision) / (School Days in the Provision Year)

The **No. of School Days in Financial Year** field defaults to 190. If the user requires a different value, it must be amended prior to the year definition record being saved. Only whole numbers can be entered with a maximum range of 1-366 (365 for financial years not covering a leap year day). Additionally, the maximum value that can be entered cannot exceed the total number of calendar days in the provision year.

This value is automatically set to 190 days for existing **Financial Provision** years. Whether the years are future, current or past does not affect this.

In addition, where provisions exist for a given provision year, that **Year Definition** record cannot be amended (including the new field for number of school days in provision year).

KB403533

Accessing v3 Statement Memo in v4 SEN

The **Statement Memo** functionality was not included in the v4 SEN module.

Where there is a need to retrieve the information held within the **Statement Memo** area for v3 records, a report called **SENv3 Referral Memos** has been created. This report is available via **Special Educational Needs | Links | Reports**.
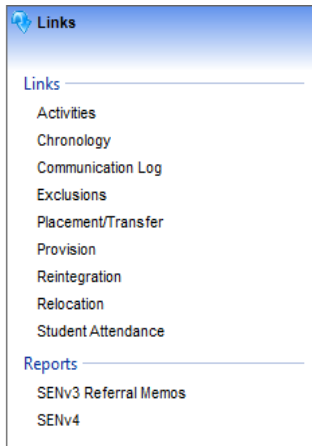
The report functions as a linked report against an involvement record if added to the correct folder on the report server.

The report is available on **Support Net | Resource_ID 21767** and on the One Spring 2014 release (3.53) DVD in the **Predefined Reports** folder.

CSS/SEN Autumn 2013 Release (3.52.202)

Resolved Knowledge Base Issue

This hot fix is available on **SupportNet | Resource_ID 22561**.

KB404290

This hotfix resolves the issue in refreshing the new provision year for any provision records which have a start or end date during the new year definition.
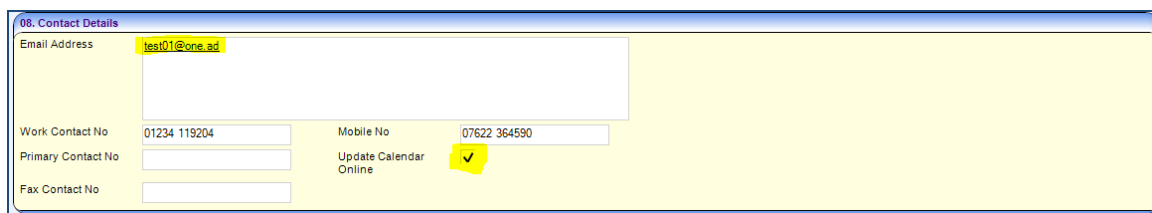
CSS/SEN Autumn 2013 Release (3.52)

Outlook Synchronisation with Exchange 2010

Introduction

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

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

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

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

Synchronisation is one way: One application → Outlook Exchange.

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

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

Initial Configuration / Setup

To configure the calendar settings:

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

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

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

   - **Use Proxy Server**
   - **Proxy Server URL**
   - **Proxy Server UserName**
   - **Proxy Server Password**
10. Click the **Test** button to verify the settings.
    If the test fails, ensure all the details are correct and click the **Test** button again.

11. After the connection is verified, click the **Save** button. These credentials are stored in the **application.ini** file on the Application Server. Both Username and password values are encrypted.

Example Entry in Application.ini File

The following is a sample Application.ini file:

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

One Application → Outlook Field Mapping

The following screens display the field mappings between the One application and Outlook.
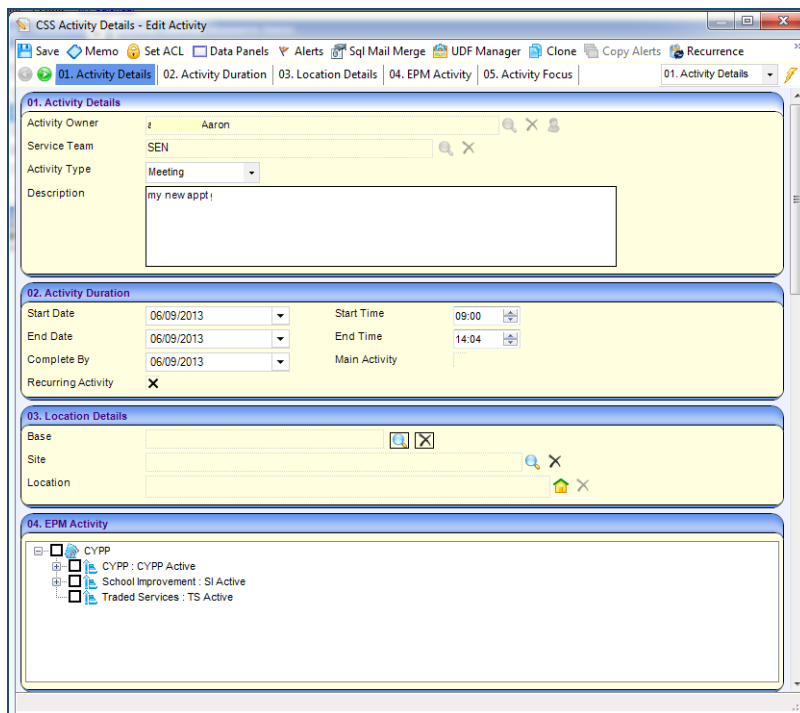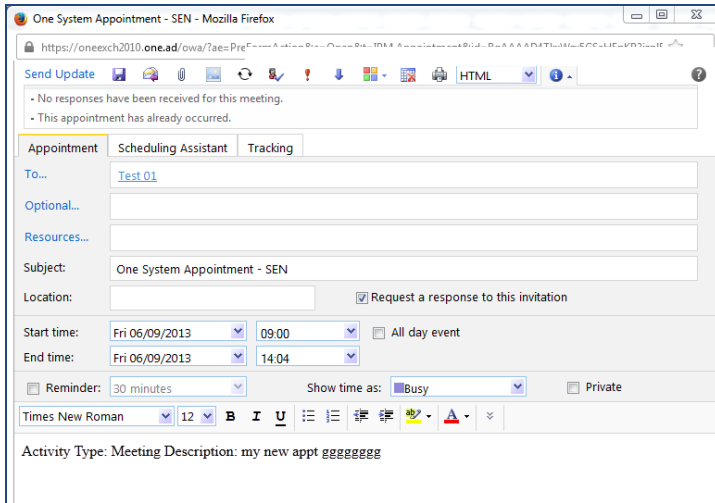
For more information on configuring One to use Exchange 2010, refer to the *Configuring Outlook Calendar Synchronisation* technical guide available from SupportNet.

Auditing

Permissions

The **Audit Log Setup** screen is accessible via the following permissions:

1.   **Tools | Permissions| User Group Processes| Select a Group| Main Business Process – Administration**.

2.   **Tools | Permissions| User Group Permissions| Select a Group| System Map | All Secured Services**.
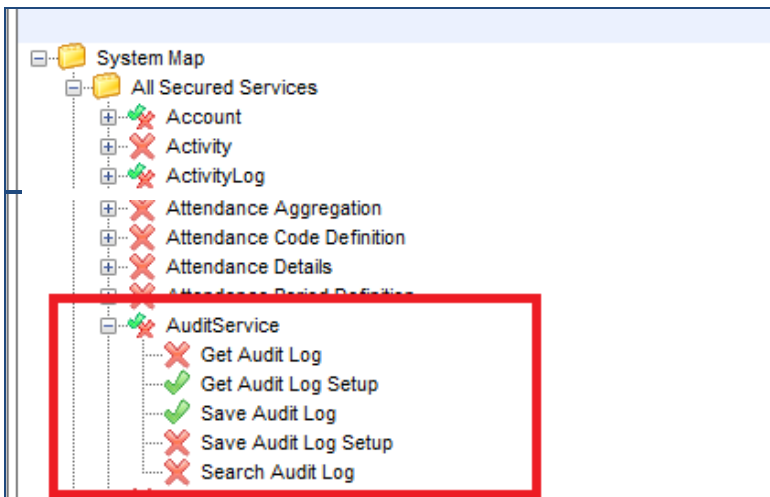
3.   **Tools | Permissions| User Group Permissions| Select a Group| All Secured Menu Routes**.

Note: When setting up Permissions, care should be taken with regards to differentiating permissions between a standard user and a System Administrator.

Changes to the Audit Enquiry Screen

The following changes have been introduced via **Tools | Audit Trail | Audit Trail | Audit Enquiry**.

1. New functionality has been added to the **Audit Enquiry** area that will greatly improve the efficiency in obtaining information.

2. The following entities in CSS/SEN are now audited:

    - All Involvement types:
        - Generic CSS Involvement
        - Legal Actions Involvement
        - SEN Assessment Involvement
        - SEN Standalone Review Involvement
        - SEN Statement Review Involvement
        - SEN Tribunal Involvement

    - Activities

    - Communication Log

    - Exclusions

    - Reintegration

    - Relocation

    - Provisions.

Auditing Viewed Records

One now audits records that have been viewed by a user. This function is controlled via **Focus | Tools| Audit Trail | Audit Log Setup** and selecting the **Audit Viewed Data** check box.
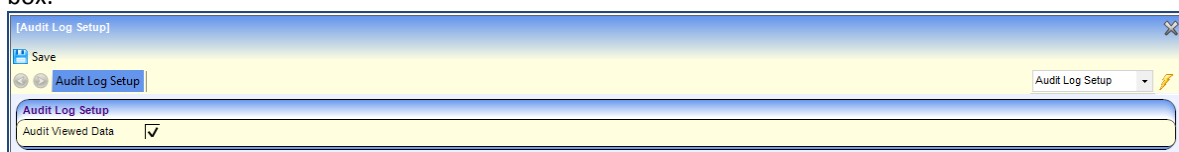
The default setting for this feature is **True** (the viewing of data is recorded). De-select the check box so that recording of viewed data is turned off.

Changes to Audit Enquiry Screen

The following field changes have been made to the **Audit Trail** screen via **Tools| Audit Trail | Audit Trail | Audit Enquiry** panel:

- Revision By

- Main Form ID

- Viewed.

The items (highlighted in red) are either new or the functionality associated with the field has changed.
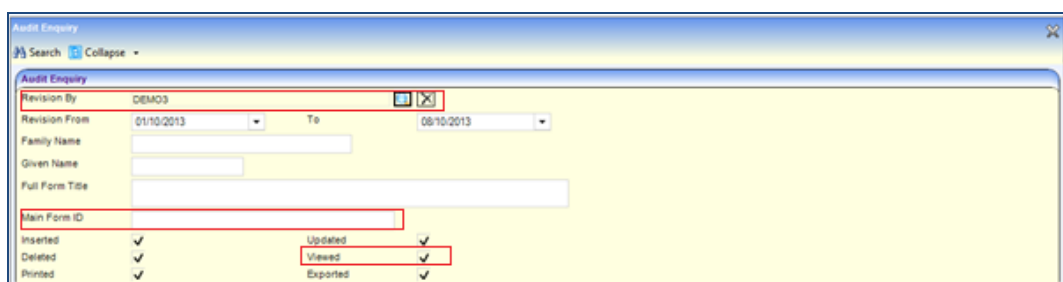
Revision By

Previously, the **Revision By** field was free text, but a **Revision By** browser look-up is now provided.
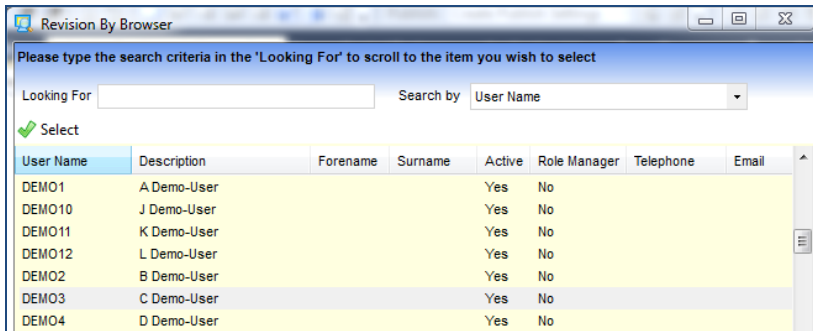
If the **Revision By** field is left blank, then One displays audit information for all users.

Main Form ID

This new field enables users to filter data, using a Main Form ID, associated to each entity.

The Main Form ID enables users to associate child records (Sub Form ID) with the parent records (Main Form ID). Previously this was not possible; now both IDs are displayed in the Results Data Grid.

The benefit of displaying this information is that users are able to associate, for example, a Court Order displayed in the Results Data Grid, directly to the Legal Actions Involvement Form from which that Court Order was created.

On the data line in the Results Data Grid displaying the Court Order, One displays the Sub Form ID – this is the ID of the Court Order, and the Main Form ID, which is the ID of the Legal Action Involvement Form. From this screen there are then two methods of finding the relevant Legal Actions Involvement:

- Entering the Main Form ID into the named field in the top filter panel

- Searching for that ID directly in the Results Data Grid.

It is also now possible to view the Main Form ID on the Involvement Form itself, and this ID has been incorporated into the Involvement search and results display via the Involvements focus for a subject.

Viewed

An additional check box has been provided to enable users to filter records that have been viewed.

Results Data Grid

The most significant change to the results grid is that **Audit Type** details are now displayed in one column instead of five. This has enabled us to provide two extra columns, for the **Main Form ID** and the **Sub Form ID**.

Provision of these IDs will enable users to accurately associate the sub forms to the main forms. This change is described above for Court Orders and their association to Legal Actions Involvement Forms.

Where the Sub Form ID is different to the Main Form ID, take the Sub Form ID to be that of the entity relating to the data in that line. In order to see the associated parent form for that data item use the searches described above to find the entry for the Main Form ID. Where the IDs are the same on that data line then that data item has no parent record.

Results Grid Functionality

The Results Grid in the Audit Enquiry has been updated to make accessing information easier and to enable users to monitor changes using markers against specific information.

It is now possible to:

- filter a record by entering criteria in a column filter.

- group the information in a flexible way.

- configure the grid to highlight particular records based on the individual needs of the user.

It is also possible to export the data displayed in the grid to an Excel spread sheet.

Full details of the operation of this functionality can be found in the *Changes to the Chronology Results Grid* section of the *One Summer 2013 Release Children's Social Care Product Notes.*

Results Grid Functionality

Provision Transfer

Introduction

The Provision Transfer Wizard enables users to transfer one or many provisions for a subject as they move from one base to another via **Focus | People | Student/Person/ICS Person | Provision |Transfer Selected Provisions.**

Permissions

The permissions for **Provision Transfer** are set up via **Tools | Permissions | User Group Processes | Main Business Process – CSS Administration | Provision Base Transfer**.

Provision Transfer Wizard

To transfer a provision:

Select Focus | People | Student/Person/ICS Person | Provision to display the Provision Summary screen.

Select the Provisions for the subject that you wish to transfer; the **Transfer Selected Provisions** button is activated.

Click the **Transfer Selected Provision** button to display the **Provision Base Transfer Wizard (1 of 3)** dialog.

Search for the base to which you wish to transfer the selected provision.
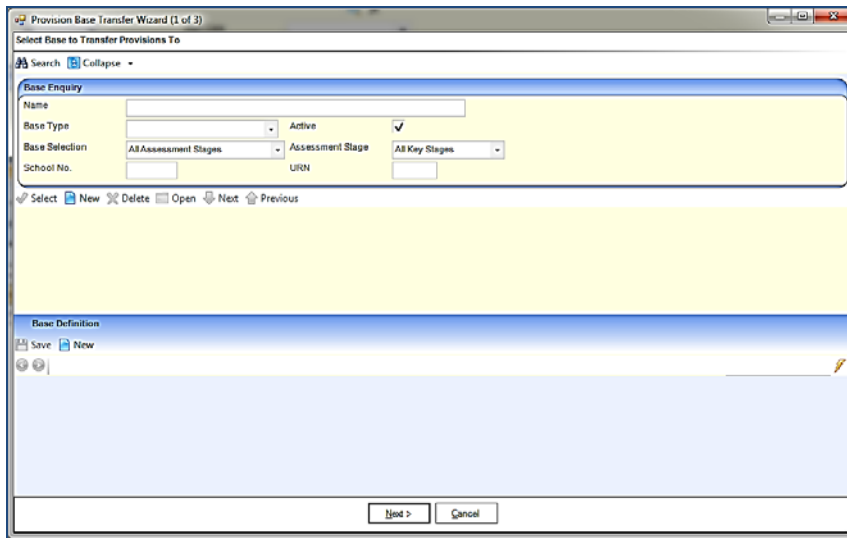
Select the base to which you wish to transfer the selected provision.

Click the **Next** button to display the **Provision Base Transfer Wizard (2 of 3)** dialog. The dates default according to the following rule:

>The **Provision End Date at Current Base** date defaults to the System Date and the **Provision Start Date at New Base** date is the Provision End Date plus 1 day. These dates can be changed.
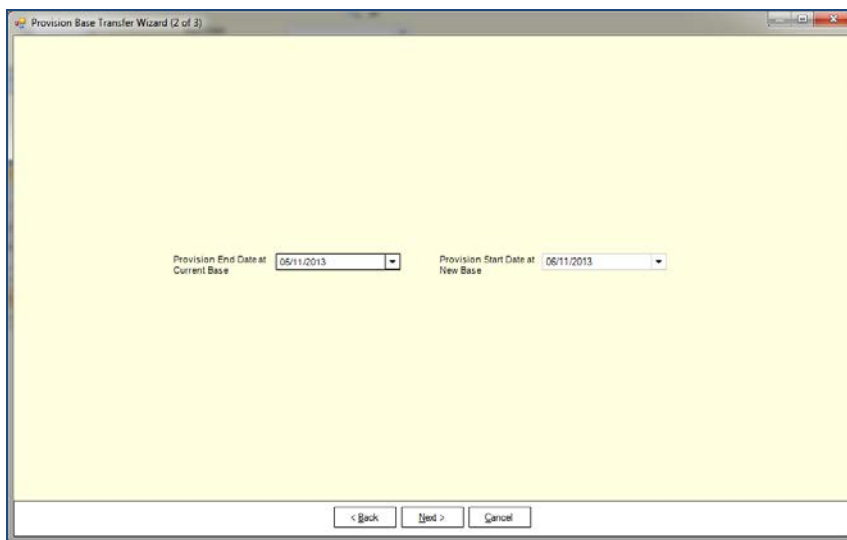
Click the **Next** button to display the **Provision Base Transfer Wizard (3 of 3)** dialog.

>If a provision year has not been set up to cover the date range of the provision, the following warning message is displayed:
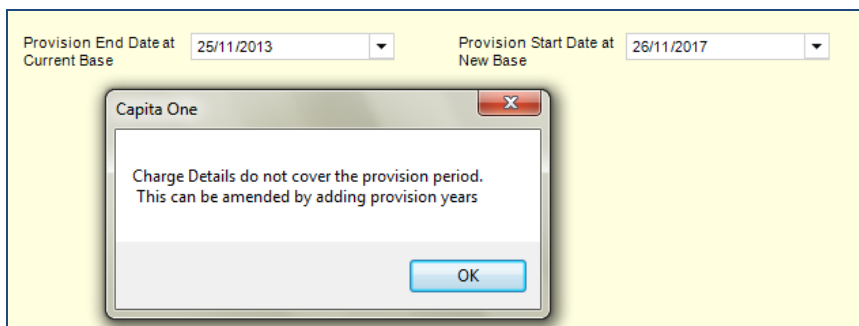
Click the **OK** button.

The **Provision Base Transfer Wizard (3 of 3)** displays the changes made to the original base in which the provision is ended and the provision being transferred to the new base. Business Rules associated with the process of transferring provisions using this wizard will use the same business rules as those used when provisions are transferred manually.

Warning messages are provided to assist with the process.

The **Provisions Ended Preview** panel warning message reminds the user that if the **Edited Estimate Check Box** is not ticked then One does not update the **Edited Estimate** field when the provision is transferred.

The **Provisions Started Preview** panel warning message reminds the user that the **Start Date** and **End Date** of the **Charge Type Value** do not span the provision date.

Click the **Finish** button to display the following message:

> The selected Provision(s) will now be transferred. Do you wish to continue?

Click the **Yes** button to display the following confirmation message:

> Provision(s) transferred successfully.

Click the **OK** button to display the following message:

> Do you want to save and print the transferred details?

Click the **Yes** button to save the record to a specified folder.

The report displays as follows:

Bulk Provision Transfer

Provision(s) successfully transferred and updated to Database on <*05/11/2013 14:54:19*> by <*System Administrator*>.

Surname:B<*Surname*>   **Forename:** <*Forename*>   **Dob:** 01/09/1997

Provision(s) Ended at Current Base

Base Name	Service	Charge Type	Start Date	End Date	Calculated Estimate	Edited Estimate	Actual Cost	Provider	Service Team
XXXXXXXXXX Upper School	Neils Service	NKM	04/11/2013	05/11/2013	30.00	2220.00	0.00	Neils Service Team	Neils Service Team
XXXXXXXXXX Upper School	Neils Service	NKM	04/11/2013	05/11/2013	30.00	2220.00	0.00	Neils Service Team	Neils Service Team

Provision(s) Started at New Base

Base Name	Service	Charge Type	Start Date	End Date	Calculated Estimate	Edited Estimate	Actual Cost	Provider	Service Team
XXXXXXXXXX Middle School	Neils Service	NKM	06/11/2013		2190.00	2190.00	0.00	Neils Service Team	Neils Service Team
XXXXXXXXXX Middle School	Neils Service	NKM	06/11/2013		2190.00	2190.00	0.00	Neils Service Team	Neils Service Team

Resolved Knowledge Base Issues

KB117740

Updated Timeline Changes Not Saved

In earlier versions of One, it was possible to create a **Communication Log** record from a **Timeline Correspondence Activity** and then close the timeline window without saving it.

One now saves the timeline when the **Communication Log** record is created.

KB401152

Timeout Message When Trying to Add Communication Log Category in Service Team Administration

To improve performance, when saving a Service Team Administration record, the save routine has been amended so that the ACL part of the save is only executed when changes have been made to the **ACL Defaults**.

KB402593

Edited Estimate Value is Blanked/Reset to Previous Value after Save

This issue only applied to amending the **Edited Estimate** field prior to the first save of the Provision record.

Previously, if an amendment was made to the **Edited Estimate** field along with any of the following fields of the Provision record: **FTE**, **Hrs/Wk**, **Current Rate**, **Wks/Year**, the value entered into the **Edited Estimate** would be lost when the **Charge/Cost** details were automatically recalculated during the first save for the record.

If at the time of saving, the **Edited Estimate** is not the same as the **Calculated Estimate**, then One offers the user the option to recalculate or keep the costs the same.
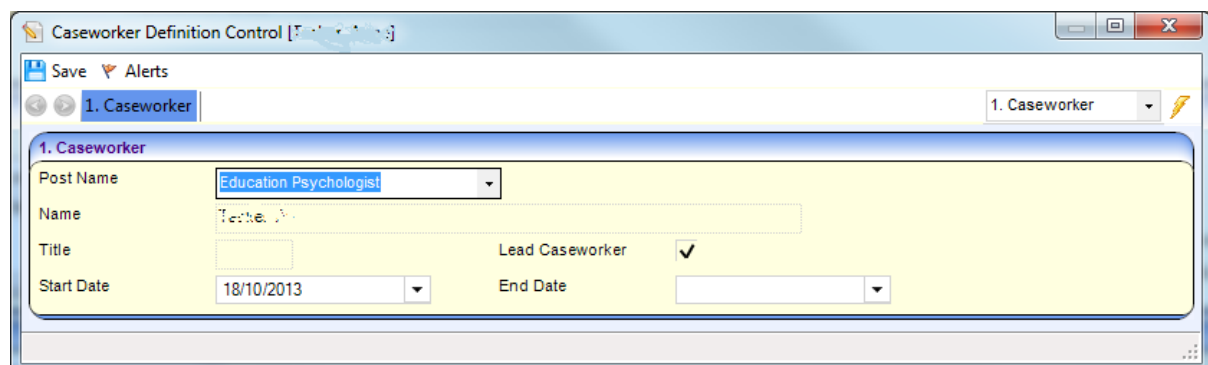
KB401278

Post Name Field in an Involvement is Incorrect

Previously, to correct a caseworker's **Post Name** in the **Caseworker** panel on an Involvement, a user would have to remove the caseworker and then add them again with the correct post.

Users can now change the **Post Name** shown on a saved involvement. This is done by highlighting the required caseworker in the panel and clicking the **Edit** button. After the **Caseworker Definition** screen appears, the user is presented with a new **Post Name** drop-down list. This drop-down contains all the valid caseworker post names for the associated person.

The graphic below displays the **Caseworker Definition Control** page with the **Post Name** field as an editable drop-down:

KB119352

Annual Review Involvement Start Dates Replicated From Previous Involvement

When performing an annual SEN Assessment review, the **Start Date** of the Next Review is set automatically to the day after the **End Date** of the Current Review.

KB402236

Equipment Inventory Search Case Sensitive

When adding and searching for equipment, all fields are now case-insensitive. The change applies to the fields accessed via **Focus | Equipment Inventory** as well as when associating equipment via a Student or Person record.

KB402626

The Involvements links from ICS Person Enquiry, Case Notes and Chronology now enable a user to access the **Involvements** screen, even if that user does not have access to the most recent involvement.

CSS/SEN Summer 2013 Release Service Pack 2 (3.51.200)

Post Name

KB401278

Post Name Within Involvement Incorrect Since Upgrade to One 3.49

Previously, to correct a caseworker's **Post Name** in the **Caseworker** panel on an involvement, a user had to remove the caseworker and then re-add them with the correct post.

Users can now change the **Post Name** shown on a saved involvement. This is done by highlighting the required caseworker in the panel and clicking the **Edit** button. After the **Caseworker Definition** screen appears, the user is presented with a new drop down list for the **Post Name** field. This drop down contains all the valid caseworker post names for the associated person.

CSS/SEN Summer 2013 Release (3.51)

Involvements

Involvement Reallocation

In the One Summer 2013 Release, users with the appropriate permissions can reallocate involvements from one Caseworker to another Caseworker or from one Administrative Officer to another Administrative officer.

The following business rules apply when reallocating an involvement:

- To reallocate an involvement, the recipient of the involvement must be in the same **Establishment** group as that of the initial Caseworker or Administrative Officer. It is not possible to transfer an involvement to a person in a different establishment.

- It is not possible to reallocate an involvement to a person with a different Role. For example, if the person linked to the involvement is a Caseworker you cannot reallocate the involvement to an Administrative Officer.

- If both a Caseworker's and Administrative Officer's involvements require reallocation, the wizard has to be used twice, once for each role.

Setting Permissions

A new **Involvement Reallocation** Business Process has been added in the v4 Client. After upgrading to the One Summer 2013 Release, the default option is **Deny**. Care should be taken when considering who should have this permission, since the feature allows any user with access to the **Involvement Reallocation** process to move Involvements from one person to another.

1. Select **Tools | Permissions | User Group Processes** to display the **User Group Processes Editor** page.

2. Select **CSS Administration** from the **Main Business Processes** drop-down.

3. Set the **Involvement Reallocation** Business Process to **Read-Write**.

4. Save the changes.
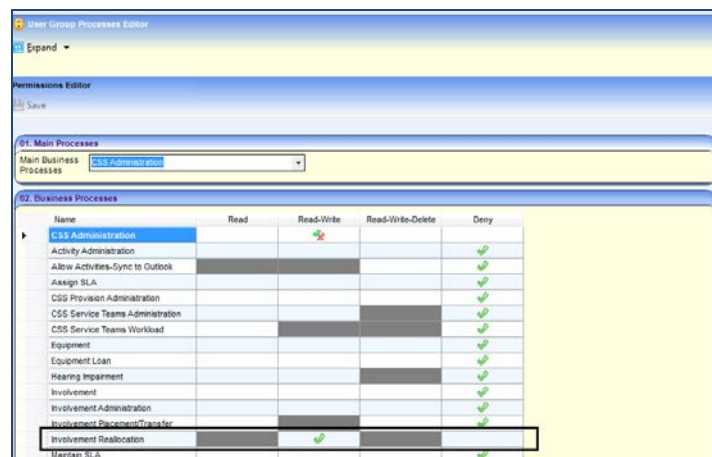
Involvement Reallocation Wizard

The **Involvement Reallocation** process utilizes a wizard, that is accessed via **Focus | Services | CSS Administration | Involvement Reallocation**. The wizard takes the user through the involvement reallocation process, enabling multiple involvements to be reallocated simultaneously from one person to another.

Involvement Reallocation Wizard (1 of 5)

Select User to Reallocate From

This dialog displays the names of all Caseworkers and Administrative Officers who are allocated to active involvements of any type. In this instance an active involvement is where the **Start Date** on the Involvement is either the same as or before the system date and the **End Date** is either empty or greater than the system date.

One only displays Caseworkers and Administrative Officers who have a current role on an involvement.
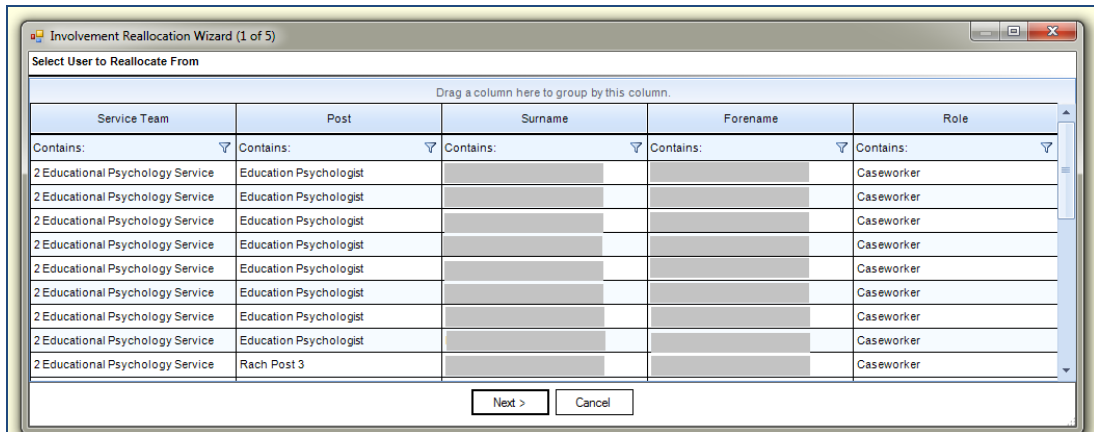
1. Highlight a record to select the required **Service Team / Post / Name / Role** combination of the involvements that need to be transferred.

2. Click the **Next** button to display the **Involvement Reallocation Wizard (2 of 5)** dialog.

Involvement Reallocation Wizard (2 of 5)

Select Involvements To Reallocate

This dialog displays the details of the involvements selected in the first wizard. The following graphic illustrates how the information is displayed:
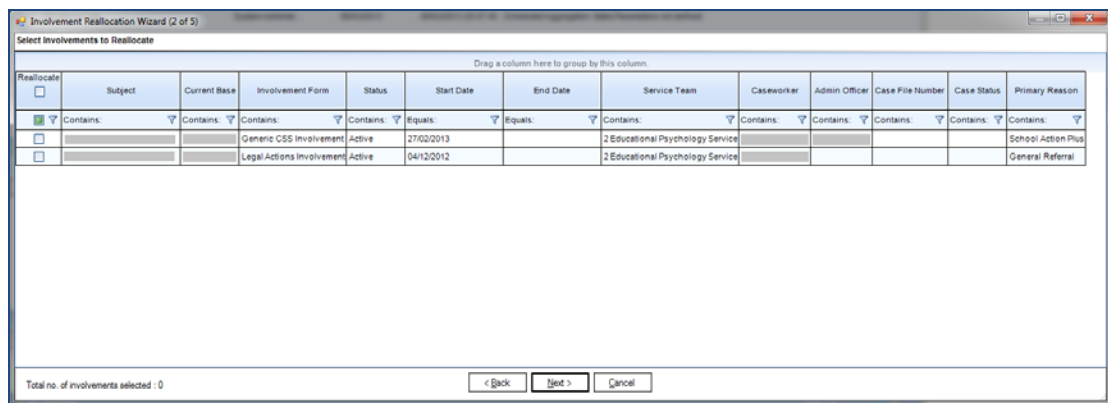
1. Select the **Reallocate** check box next to the involvements to be reallocated. Select the check box in the header panel to select all of the involvements. The total number of involvements selected is displayed on the dialog.

2. Click the **Next** button to display the **Involvement Reallocation Wizard (3 of 5)**.

Involvement Reallocation Wizard (3 of 5)

Select User to Reallocate To

This dialog displays the names of all Caseworkers and Administrative Officers that belong to the same **Establishment** group as the first Caseworker or Administrative Officer.
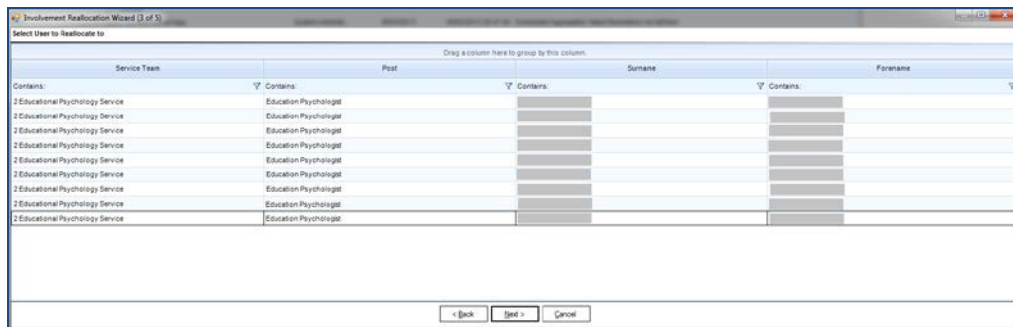
1. Highlight a record to select the required user to reallocate the involvements to.

2. Click the **Next** button to display the **Involvement Reallocation Wizard (4 of 5)** dialog.

Involvement Reallocation Wizard (4 of 5)

Effective End Date of Old User and **Effective Start Date of New User**

This dialog enables the user to add an end date to the original person/role involvement and a start date to the new person/role involvement. The default **End Date** is the system date and the default **Start Date** is the system date plus one.

A number of business rules have been coded to ensure data integrity exists with regards to these dates.
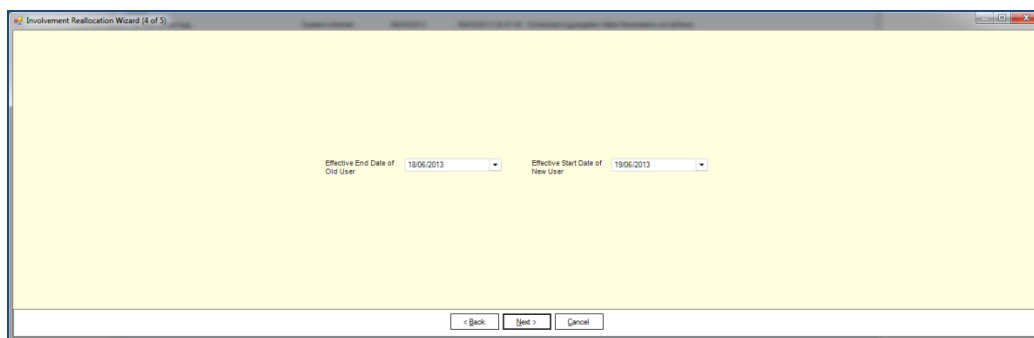
1. Select the **Effective End Date of Old User**.

2. Select the **Effective Start Date of New User**.

3. Click the **Next** button to display the **Involvement Reallocation Wizard (5 of 5)** dialog.

Involvement Reallocation Wizard (5 of 5)

Review

This dialog displays read-only details about the involvement reallocation. Click the **Back** button to return to the previous screens to make any changes.
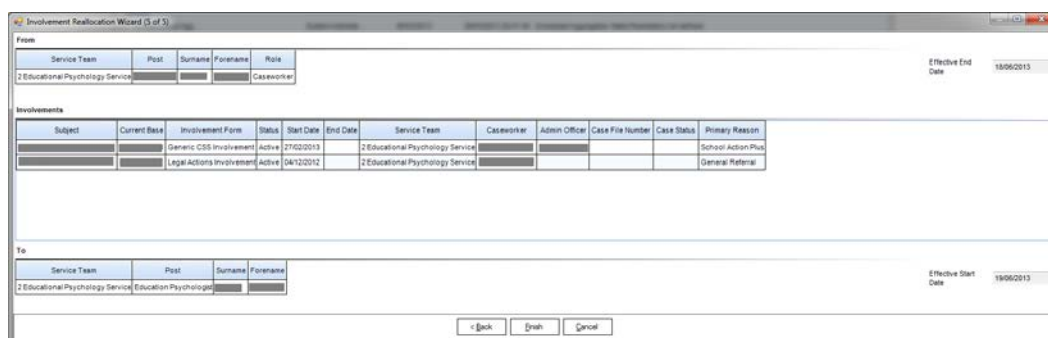
Click the **Finish** button to display the following message:

Are you sure you want to reallocate this involvement?

Clicking the **Yes** button displays the following message:

Involvement successfully reallocated.

Printing the Involvement Reallocation Details

After the Involvement has been reallocated, the following message displays:

Do you want to save and print the allocated details?

1. Click the **No** button to end the process and return to the **My Home Page**.

    Click the **Yes** button to display the **Save and Print Reallocation As** dialog.
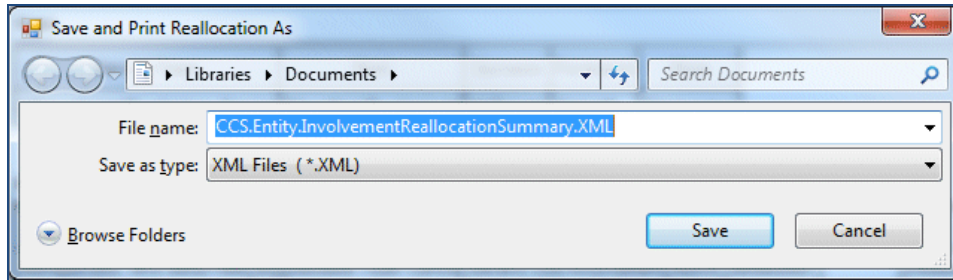
2. Select a location to save the file.

3. Enter a **File name**.

    The file can only be saved as a .XML file.

4. Click the **Save** button. The file is saved to the location of your choice and the detailed document displays on screen.

5. Select the **File | Print** button to print the document.

SEN Status

KB401595 – Status Statement Not Valid for Home LA

In a few scenarios, users could not amend the **SEN Status** field for children when they needed to.

To avoid over complicating the rules of when the SEN Status can be changed (which are affected by the presence of a SEN license, an involvement for the child, their home LA and what stage they are at in the SEN process), an override user has been introduced called SEN_ADMIN.

The SEN_ADMIN user can force a change to a student's Home LA. This is necessary if a student with a SEN Statement resides outside their default Home LA and has their Home LA set to their current location, but then subsequently moves residency into their default Home LA region.

Normally the **Transfer In** process should be followed but there are certain circumstances where the LA might want to change the Home LA of such a student directly. Currently, if the user tries to change the Home LA of a student with an **SEN Status** of **S** or **Q** to the default Home LA, the following message is displayed:

> SEN Status 'Statement/School Action Plus – Under Ass' is not valid for XXXX Home LA.

Changes Made

As permissions cannot be added to this particular field, we have created the SEN_ADMIN user via **v3 | Tools | System Administration | LA Defaults**. The designated SEN_Admin user is the only user who can change the student's Home LA when it has an **SEN Status** of **S** or **Q**.

Only one user can be defined as SEN_ADMIN.

1. In the v3 Client, select **Tools | System Administration | LA Defaults** tab.

2. Highlight the **SEN_ADMIN** parameter code.

3. Click the **Value** browse button to display the **Select Default Setting** dialog. The dialog contains a list of active users from the **System Administration Users** table.

4. Highlight a user and click the **Select** button to populate the **Value** field.

5. Save the record.
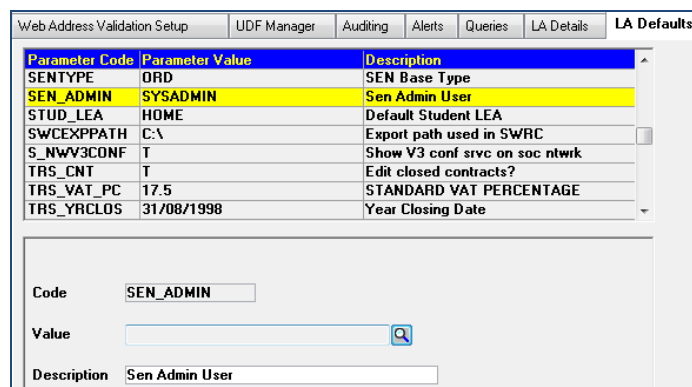
Now, when the user changes the Home LA, the following message is displayed:

> You are changing the student's Home LA to match the default LA for a student with an existing SEN Statement. This is not normally permitted. Do you wish to continue?

Click the **Yes** button to change the Home LA.

Any other users attempting to change the Home LA of a student with a **SEN Status** of **S** or **Q** to the default Home LA still receives the following message and is unable to proceed.

> SEN Status 'Statement/School Action Plus – Under Ass' is not valid for XXXX Home LA.

CSS/SEN Spring 2013 Release Service Pack 2 (3.50.200)

Purpose

KB401857

In the **Chronology** screen, there was a restriction that only allowed involvements to be launched by the current logged on user's service team or teams.

This fix removes this restriction.

Additionally, the following error message was displayed when searching for a v3 SEN Involvement in the Chronology:

Column 'LOCKED' does not belong to the SenAssessmentCollection.

This fix prevents the error from happening and the above message being displayed. The following message is now displayed to the user:

Details for this item are from V3 and cannot therefore be displayed.

CSS/SEN Spring 2013 Release Service Pack 1 (3.50.100)

Purpose

Issue

CSS Service Team Workload Filtering with a Large Volume of Data

When a Local Authority (LA) had a large number of involvements saved in One, and a user attempted to open the **Service Team Workload** screen, One was failing to respond correctly. This issue was identified in the One Autumn 2012 Release Service Pack 2 (3.49.200).

Detailed investigation identified that One was obtaining the complete set of records from the database and then attempting to undertake the filtering process required on the user's PC. It was the impact of attempting to process a large number of records locally that was causing One to fail.

Fix

This issue has been resolved by changing the filtering process. With effect from this service pack, the filtering is done on the database server, rather than on the user's client installation.

If the user keeps the default setting, **Show current/future only** ticked, One displays all the records meeting this criteria. However, when the user changes the setting on this field, then One refers to the QBE threshold limit. If the number of records to be displayed exceeds the QBE threshold then One presents the user with a message informing them that this has occurred and requests the user to restrict the filter.

Additionally, One automatically updated the results screen as soon as a change to the filter criteria was made. This often resulted in multiple requests being sent to the database. With effect from this service pack, One displays the results of the changed filter criteria when the user clicks the **Refresh** button.

CSS/SEN Spring 2013 Release (3.50)

Introduction

The primary focus for CSS and SEN has been the resolution of customer issues, and improving the overall quality of both of these products, thus improving the user experience when working in CSS and SEN

CSS Involvements

KB115153

Duplicate Involvements Created When Saving Involvements

Some users found that a duplicate involvement was created on saving a new involvement; this issue has now been resolved.

KB119403

Error Message: Invalid object name dbo.vw_WorkflowInstanceEvent

The following error message was displayed when accessing involvements, and then searching for an existing timeline:

> Invalid object name dbo.vw_WorkflowInstanceEvent.

The search by a user for a related involvement now works correctly.

KB114039

Inactive Additional SEN Needs Not displayed in CSS Involvements

Previously, One did not display inactive **SEN Needs** look up codes (*LookUp_ID 0123*) used in the **Additional Needs** section of a CSS involvement. From this release , Additional SEN Needs allocated to CSS involvements, which subsequently become inactive, will continue to be displayed on the CSS involvement.

KB114765

Error Message: Object reference not set to an instance of an object

The following message was displayed when adding a prosecution record to an involvement:

> Object reference not set to an instance of an object.

Prosecution records can now be correctly added to involvements without the above message being displayed.

KB400845

Unable to Filter Open or Closed Involvements Separately in Service Team Workload

In the Autumn 2012 (3.49) release, a change made to the functionality of displaying involvements meant that users were unable to filter the results to display only open involvements. This issue has now been resolved, and users can select to view either open or closed involvements, by using the **Show current/future only** tri-state check box.
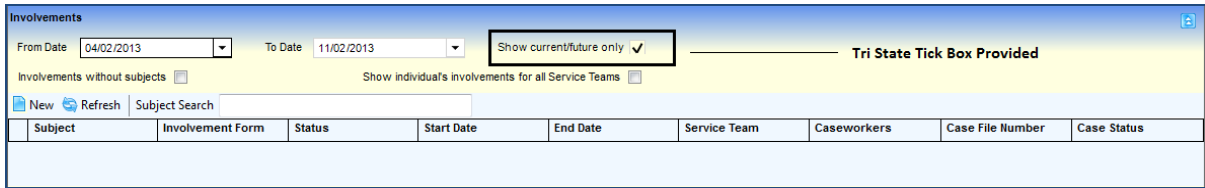
The **Show current/future only** check box is a tri-state check box that defaults to a ticked state. The check box filter works in conjunction with the **Date Range** filter, which filters out involvements that <u>started</u> within the date range and when left blank considers all involvements. One always refers to the **Date Range** filter first, and then displays the involvements contingent on the status of the check box.

The way in which the different check box settings filter the data is listed below. Reference made to the caseworker in the notes below, will be the caseworker selected in the Teamwork structure at the top of the screen, as shown in the following screen print:
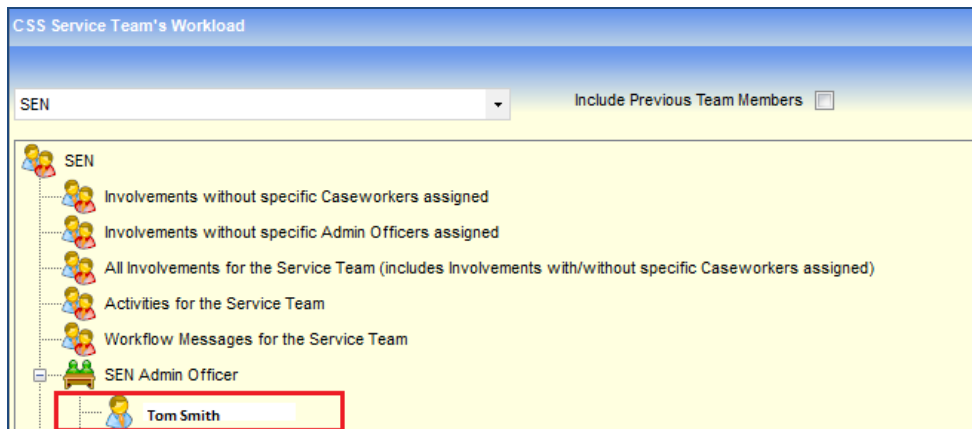
For each of the different scenarios listed below, the involvements displayed relate to those where the caseworker is Tom Smith.

The function of each state is as follows:

Tick:
One displays all of the active/future involvements (i.e. involvements without an **End Date** or where the **End Date** is in the future) and where the caseworker, for whom the workload is displayed, is an active caseworker on the involvement (indicated by the caseworker **End Date** on the involvement being blank or in the future).

Cross:
One displays all of the inactive involvements (i.e. involvements where the **Date** is in the past) and where the caseworker, for whom the workload is displayed, was associated to the involvement at some point in the past.

Blank:
One displays involvements according to the above filters and all active/future involvements (i.e. involvements without an **End Date** or where the **End Date** is in future) where the caseworker, for whom the workload is displayed, was or has been associated to the involvement at some point.

The **From Date** in the date range defaults to a date based on the number entered in the **Inv_Filter** field which is located in v3 via **Tools | Sys Admin | LA Defaults**. The number in this field defaults to 7, but LAs can change this number. For example, if 9999 is set, then One displays the date 9999 days ago in the **From Date** field.

KB99454

Unable to Control Display of Look Up Codes on Involvement Forms
Previously, users were unable to control the display of **Lookup Codes** on involvement forms to specific service teams.

Users are now able to indicate which lookup codes should be displayed for selection on the involvement form. This is done by accessing the involvement form via **Focus | Services | CSS Involvement Form**.

The sections highlighted with a black boarder are the sections that control the display of the lookups, when the involvement is created. The default is to select all lookups.
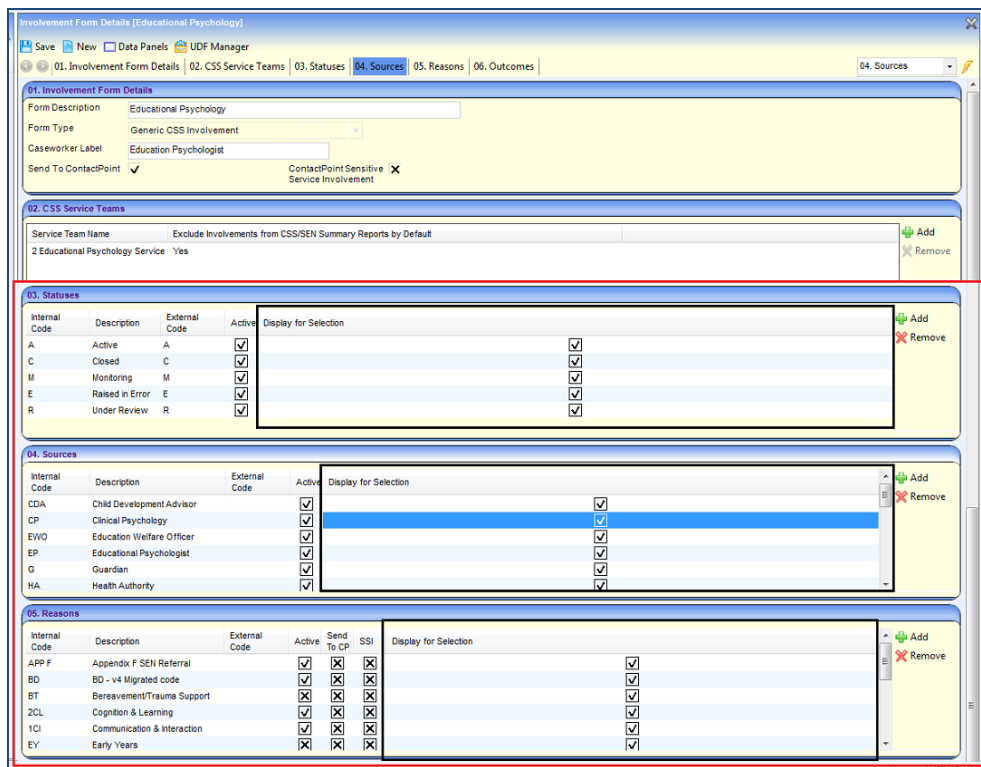
KB400769

Manually Editing the From Date Field and Clicking the Refresh Button

If you enter a date in the **From Date** field, manually edit it, and then click the **Refresh** button, One retains the edited **From Date**, and updates the **Results** screen. Previously, One updated the **From Date** field to the default and therefore did not update the **Results** screen.

KB106309

Lead Caseworker Auto-Assigned to an Involvement

Previously, One would automatically assign a lead caseworker to the involvement, where a lead caseworker did not exist.

In this release, where One identifies that a caseworker should be set as the lead, One displays the following message, indicating which caseworker will be set as the lead caseworker:

> The system has auto selected *<Surname, Forename>* as Lead Caseworker.
> Please review and re-assign if required.

The intention of this message is to alert the user to the change, so if the user wishes to alter the default allocation, they can do so manually.

KB90170

Inactive Lookup Codes Not Showing on v4 Involvements

Inactive lookup codes were not showing on involvements in v4, making them appear to have been lost during the migration from v3 to v4.

Migrating from v3 to v4 now displays inactive lookup codes from v3 as inactive lookup codes in v4.

In addition, the **Active** and **Inactive** indicators in the **Lookup** panels now display as check boxes.

CSS Access Control Lists (ACL)

KB114914

Linked Documents Not Inheriting Properties of ACL Set Against Activity

If an ACL had been set that prevented users from editing an activity, the associated linked documents did not inherit the properties of the ACL.

The associated linked documents for an activity now respect the ACL set against the activity.

This issue has been fixed for all areas in One v4 Client, where the feature to associate a linked document to an entity exists. This has also been resolved for CSS Online, but not for any other One Online modules.

Communication Logs

KB106633 - CSSv4 Communication Logs created via the Student screen did not have ACL settings by default

When a Communication Log is created via the Student, the ACL, if one exists, is now inherited from the Service Team. However, a known issue does exist, if the ACL for the Service Team is edited after a Communication Log has been created, the ACL for that Communication Log is not updated to reflect the edited ACL for the Service Team.

Provisions

KB400723 - On adding or editing values in Panel 1 of the Provision Screen, the Edited Estimate value is now updated correctly, if required.

If required, the **Edited Estimate** value can be automatically updated when the following fields are edited: **Start Date**, **End Date**, **F.T.E.**, **Hrs/Wk**, **Current Rate**, **Wks/Year**.

When creating a new provision and adding values in any of the above fields, on the first save of the **Provision Allocation** screen, One calculates the values in the **Calculated Estimate** column and the **Edited Estimate** column.

For any subsequent saves of a provision record, if any of the values in the fields above have been edited, the following message is displayed:

> You have made changes to the Provision Details. This will not update the Edited Estimates in the Charge/Cost Details panel. This will only update the Calculated Estimates. If you wish to update both these Estimates click the Update Calculated and Edited Estimates button.'

This message has an **OK**, an **Update Calculated and Edited Estimates** button and a **Cancel** button.

Clicking the **OK** button updates the values in the **Calculated Estimate** column in panel 2 and saves the changes made in the provision record, but it does not modify the value in the **Edited Estimate** column.

Clicking the **Update Calculated and Edited Estimates** button updates the values in both the **Calculated Estimate** column and the **Edited Estimate** column in panel 2 and saves the changes made in the provision record.

Clicking the **Cancel** button returns the user to the provision screen without saving any changes.
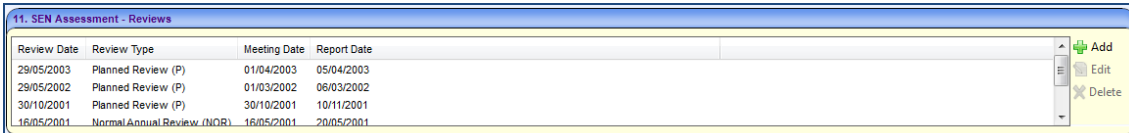
SEN

KB401001

Ordering of SEN Assessment Reviews
Previously, the **SEN Assessment - Reviews** panel of an SEN involvement was not displayed in the correct order.

The assessment reviews are now displayed in descending date order.

SEN Caseworker and Administrative Officer displayed in SEN Statement Review from SEN Assessment.
In this release the caseworker <u>and</u> the Administrative Officer from the SEN assessment are copied into the related statement review.

KB113025

Save Button Re-labelled to OK
Prior to this release, the **Charge Cost Details** screen displayed a **Save** button. This gave an incorrect impression to the user, that clicking this button saved all the details in the screen. Actually, the data is saved when the **Save** button on the **Provision Allocation** screen is clicked.

In order to avoid confusion, the **Save** button on the **Charge Cost Details** screen has been changed to **OK**.

KB106430

SEN Assessments Incorrectly Displayed on Home Page | My Involvements
SEN assessments were displayed in the **My Involvements** panel on the **My Home** page of the Administrative Officer associated to that SEN Assessment, even though the Administrative Officer had an **End Date** that was before the system date.

From this release, when an Administrative Officer selects to view their involvements, One displays the SEN assessments associated to the Administrative Officer, where a current record exists.

KB88706

New Filter Added to Student Enquiry Screen

A new filter has been added to **Student Enquiry** screen, enabling users to display only those students who are **SEN Active** students.

In the **Student Enquiry** screen, a check box labelled **Only SEN Active Students** has been provided. The default option is a cross, indicating that One will not use the filter, and therefore displays all students based on the other selection criteria set.

When this field is ticked, One returns students who meet all other filter criteria and also have a SEN assessment that is active (in the **SEN Assessment | SEN Assessment Statement Details** panel, the **Active** field is ticked).
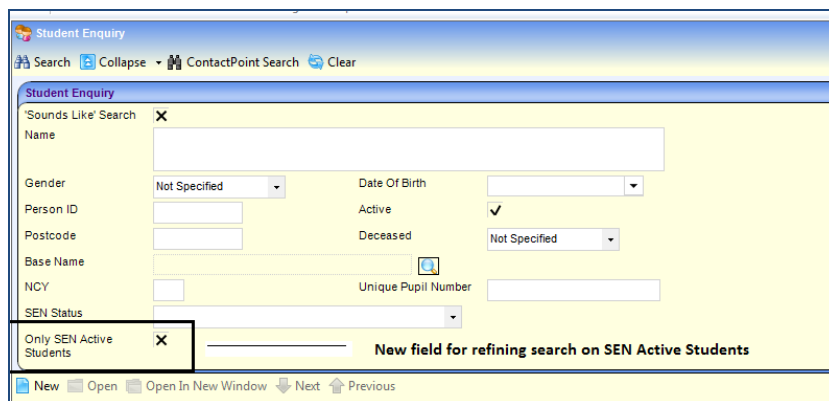
KB401002

Secondary SEN Needs Displaying in SEN Need Dropdown

In the **Primary SEN Need** dropdown, One was displaying SEN needs that should only be displayed in the **Secondary SEN Needs** field.

The **Primary SEN Need** field no longer displays **Lookup Need** values (*Table_ID 0123*) that have an external code of **Secondary – SEC**.

From this release, this business rule change will not impact on any primary needs already selected in this field that have an external code of **SEC**. This fix has also been applied to CSS Online.

The lookup with an **External Code** of **SEC** is displayed for selection in the **Additional SEN Needs** field.
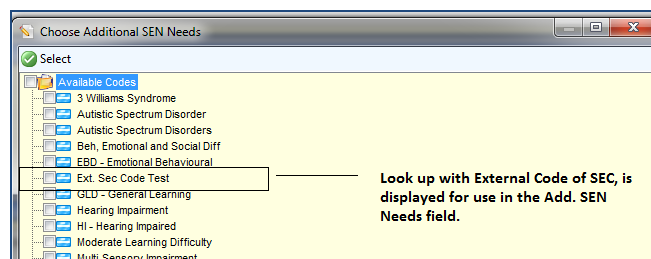
KB107408

Cost Types Display to Internal Code and Description

Previously, the **Cost Types** lookups did not display the internal code. From this release, the **Cost Type** lookups display both the **Internal Code** and the **Description**, enabling the user to identify the cost type they require.

KB401075

Information Lost When Changing Status of Provision Payment

The issue has been resolved so that when the **Status** of a provisions payment is changed, the information in the **Authorisation Date** and **Authorised By** fields is not lost.

KB115391

No Year Total for Provision

An additional panel labelled **Results Total** has been provided on the **Person | Provision Summary** screen. This panel gives the aggregated totals of the following fields, for the provisions displayed in the **Results** section.

- Calculated Estimate

- Edited Estimate

- Actual Cost.

Therefore, if a user changes the filters in the **Provision Search** panel and clicks the **Search** button, One displays the relevant provisions with the aggregated totals for those provisions in the **Results Total** panel.

This new feature provides users with the facility to easily obtain a wide range of provision totals for a person. For example, in addition to obtaining the total value of provision for a specific year it is possible to see the total value of provision by:

- A specific provider

- A specific service

- A specific provider / service combination.

In addition there are other combinations that include other provision years or all provision years, and date ranges. One uses these dates in combination with **Provider** and **Service** filters.

CSS/SEN

KB105137

Facility to set as default Assessment Officer or Administration Officer in the Communication Log Sender field.

Previously, One only provided for a default of Assessment Officer in the **Communication Log Sender** field.

In this release, there is the option to set the default **Communication Log Sender** to either Assessment Officer or Administration Officer. This is done via **Focus | Services | SEN Administration | SEN Assessment User Defaults**.
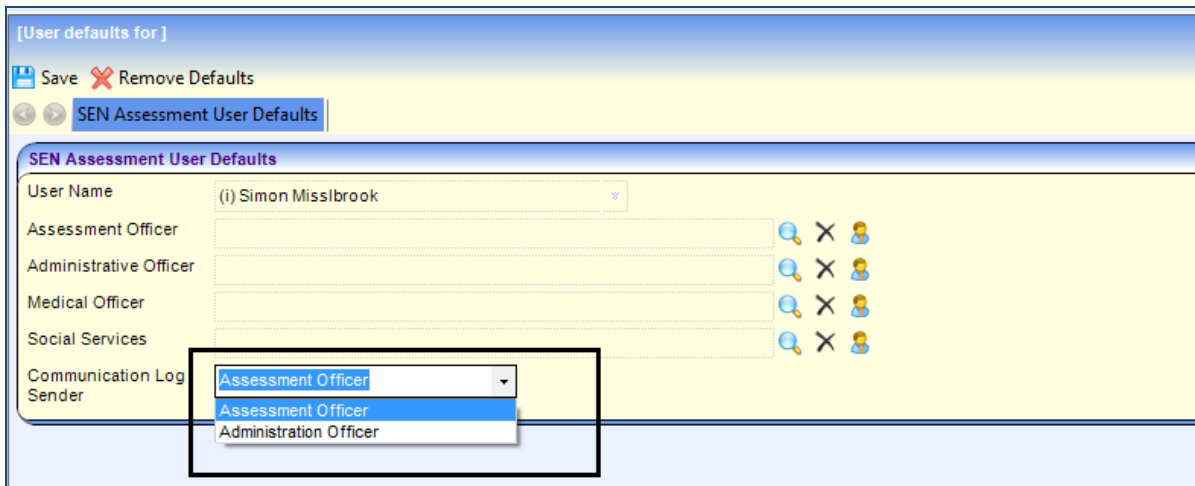
KB97866

Ability to Print Calendar Record Associated to Activity

It is now possible to obtain two additional printouts of the **Activity Calendar**, by clicking the **Print** button and selecting from the options in the drop-down menu.
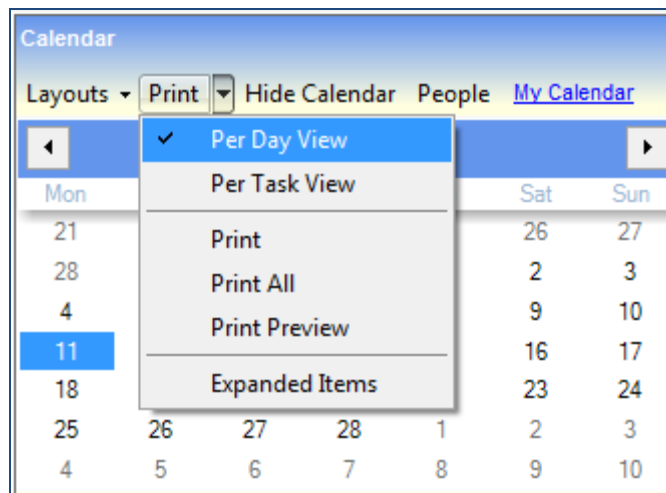
The two new print options are:

- Per Day View
- Per Task View.

The following g is produced for layout: **Working Hours/Day | Print | Per Day View**.

Date	Time	Task	Base & Location
Mon (11/02/2013)	Full Day	(M) Review - Review Janet's notes	
	10:00 AM to 11:00 AM	Meeting - Test	
	03:00 PM to 04:00 PM	Home Visit - Visit Janet at home.	

The following screen print is produced for layout: **Working Hours/Day | Print | Per Task View**.

Date	Time	Task	Base & Location
Fri (08/02/2013) - Tue (12/02/2013)	12:00 PM to 11:00 AM	Review - Review Janet's notes	
Mon (11/02/2013)	10:00 AM to 11:00 AM	Meeting - Test	
	03:00 PM to 04:00 PM	Home Visit - Visit Janet at home.	

KB401059

Incorrect message: A Year Definition Already Exists for the Same Business Process, Year Type and Start Year

When attempting to create a new provision year, the following message was displayed:

> A Year Definition already exists for the same Business Process, Year Type and Start Year.

This message was incorrect. The circumstances that caused this message to be displayed have been corrected and a new provision year can be created, without the error message.

KB119216

Missing Indicators to Show Memos and Linked Documents Exist for Activities Created for a Base

With this release you can see if **Linked Documents** and **Memos** exist for activities created for a base. This has been achieved by providing two columns in the **Results** section of the **Activities** search.

The first one is for Linked Documents, where the **Status** of a check box for each activity indicates the existence or otherwise of a linked document. The second one is for memos where the existence of a red memo icon indicates that the memo contains some data.

Improvements

SEN Statement Review Auto-populates with Admin Officer Details

Previously, when a SEN review was created from a SEN assessment, the Admin Officer recorded in the SEN assessment was added to the **SEN Statement Review**, only after the SEN statement review was saved.

In this release, the details of the Administrative Officer are added to the SEN statement review at the point when it is created.

Workflow Management - Timelines Online

Re-activate an Activity

The One Spring 2013, 3.50 release introduces the re-activate functionality.

This feature enables you to undo the last completed or skipped activity on the timeline. If you need to re-activate an activity further up the timeline tree, you must re-activate each activity individually.

- You can only re-activate an activity that has been completed or skipped.

- You cannot reactivate an activity that is in progress.

- You can only re-activate one activity at a time.

- You cannot re-activate an activity if you have made other changes to the timeline and have not yet saved those changes.

To re-activate a skipped activity (if it is not the last activity) right-click on the activity and select **Re-Activate**.

A recently skipped or completed activity on the workflow timeline can be reverted to its prior state. Only one activity can be re-activated at a time.

You can re-activate any of the individual activities that have been skipped or completed, by right-clicking on the activity and selecting **Re-Activate**.
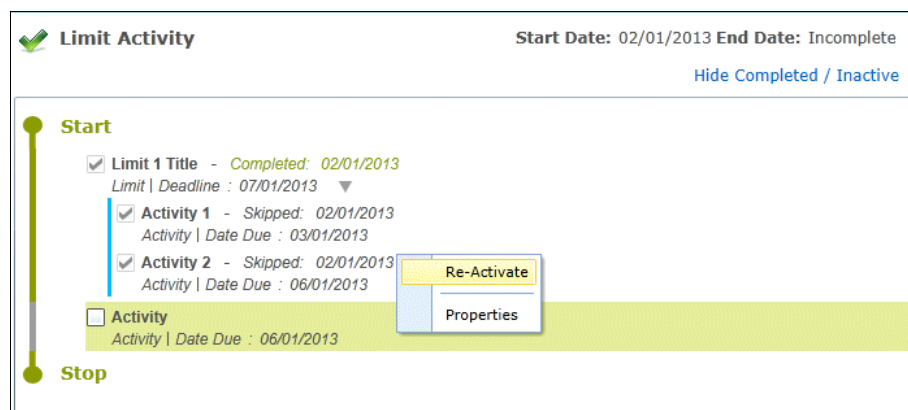
After an activity has been re-activated, the status label next to the respective activity title disappears and, depending on its position in the timeline, it has a status of not started or in progress.

If all of the activities on the timeline have been completed then none of the activities can be re-activated.

If the activity to be re-activated is a correspondence activity, i.e. a letter, a confirmation message is displayed:
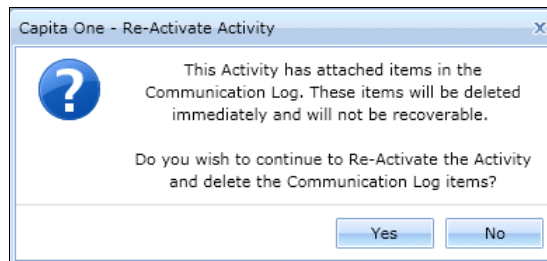
If you click the **Yes** button, the communication log item that was originally created when the letter was generated will be permanently removed. This is not recoverable. Click the **Yes** button to re-activate the activity; click the **No** button to return to the timeline, without making any changes.

CSS/SEN 3.49 Client

Introduction

In the One 3.49 release of the v4 Client SEN & CSS, a number of defects have been addressed. The details of these changes are provided below.

Provisions

KB108440 – Timeout When Saving Changes to Charge Type with Many Associated Provisions

Previously when you attempted to save changes in the **Charging Details** panel of a charge type, if there were a large number of associated provisions, then the system would time out. This issue has now been resolved.

KB119385 / KB119600 – Provision Records Incorrectly Identifying Year 2012/13 as a Leap Year

Provision Allocation | **Provision Details | Wks/Year** field displays the number of weeks in the provision year when the provision record starts. Previously, One identified the provision year 2012/13 as being a leap year, even though this financial year starts on 1st April 2012. Therefore, in this panel, the value in the **Wks/Year** field for this year was being set to 52.2857 (instead of 52.1429 which is the value for a normal year).

Charge/Cost Details panel displays the charge cost records that the system creates which cover the period of the provision (there is a charge cost record for each provision year). In this panel, One was also identifying 2012/2013 as being a leap year and showed the charge cost record for that year with an incorrect **Wks/Year** value of 52.2857.

Depending on the charge type used, the **Wks/Year** value is used in the calculation of provision estimates. Therefore, in charge cost records where the provision year was incorrectly identified as a leap year, the estimate values were also incorrectly calculated.

If the charge cost record that displays a value of 52.2857 (the **Wks/Year** value for a leap year) was edited, then the system was changing this value to 52.1429 (the **Wks/Year** value for a normal year) and used this value in the associated recalculations.

In addition, if the charge type for the provision used **Hrs/Week** calculations, then all the charge cost records that are displayed in the **Charge/Cost Details** panel had the same value for the **Wks/Year**, irrespective of the provision year the charge cost record covered.

These issues have been fixed in One 3.48.200 (Service Pack 2) and also in One 3.49. Now, when a provision allocation record is created or edited, in both the **Provision Details** panel and in the **Charge/Cost Details** panel, all **Wks/Year** values display correctly whether or not the provision year is a leap year. This means that any calculations that use the **Wks/Year** value are now also correct. In addition, where a charge type with Hrs/Week Calculations is used, the **Charge/Cost Details** shows the correct **Wks/Year** value for each charge cost record based on the type of year.

Ending a Charge Rate Occurring in a Leap Year Changed the Wks/Year in Associated Provision Charge Cost Records to a Normal Year

In the **Provision Charge Type** screen if you end a charge rate, then any associated provisions that have charge cost records for that date range will also be updated. Previously, if the charge rate occurred during a leap year, when the system updated the charge cost records, the Wks/Year value in these records was changed to

52.1429 which is the value for a normal year. This has now been fixed and the Wks/Year value remains as 52.2857 (the value for a leap year).

KB118481 – Creating New Charge Type Details Affected Previous Provision Records

In a provision charge type, when new charge details are added, One also updates any current or future cost details for associated provisions to reflect the changes. Previously, if the **Period Allocated** value was manually edited in any of the associated provisions before the change in the charge type was made, when you created the new charge details, One was also incorrectly updating the historic cost details of these provisions. This issue has now been resolved.

KB102878 – Not Calculating Correctly When Period Allocated is Zero

Previously, when the **Period Allocated** value in a Charge/Cost record was set to zero in a provision, One was not calculating the **Calculated Estimate** value correctly. This issue has now been resolved.

KB102660 – Not Calculating Correctly When Current Rate is Zero

Previously, when the **Current Rate** value in a Charge/Cost record was set to zero in a provision, One was not calculating the **Calculated Estimate** value correctly. This issue has now been resolved.

KB119246 – Funding LA in Provision Showing as Inactive

The **Provision Allocation | Funding LA** panel was previously showing funding Local Authorities as inactive, even though these were active in the lookup table. This issue has now been resolved.

KB400284 – Error When Editing the Provision Allocation Screen

If a user in the **Provision Allocation** screen updates a combination of fields in the **Provision Details** panel and the **Charge/Cost Details** panel then attempts to save the record, the following error message is displayed:

> Server was unable to process request. Operation is not valid due to the current state of the object.

This issue has recently been highlighted by users after the One 3.48 Service Pack 2 was applied and is now resolved.

Student Details

KB118735 – Inactive Students Returned When Searching for Active Students

Previously in the **Student Search** screen, when you set the search criteria to only search for active students, if you entered the Student_ID of an inactive student, One returned the inactive student in the search results. From this release, if you set the search criteria to only search for active students, the system will not return any inactive students.

KB91290 - School History Not Being Updated When Student Made Inactive

Previously when you made a student inactive in the **Student Details** screen, you were not prompted to end any associated school history records. From this release, this v4 client functionality has been changed to match the behaviour in v3. Now, when you make a student inactive in the **Student Details** screen, and if there are open school history records, on saving, a message displays asking you whether you also wish to end the school history records. If you select **Yes**, you will be asked to select an end reason for the school history records. One will then end all open records using the end reason you selected and the inactive date from the student details record as the school history end date.

Service Team Workload

KB103534 / KB95171 – Unable to View Closed Involvements and/or Involvements Without Subjects

Previously in **Service Team Workload | Involvements** you were unable to view involvements that were closed or without subjects. From this release, the **Involvements** panel no longer displays only current and future involvements. Instead, a set of **Date Range** fields and an **Involvements Without Subjects** check box have been added to the top of this panel to enable you to specify the involvements that you wish to view. The following screen shot displays the current panel layout.
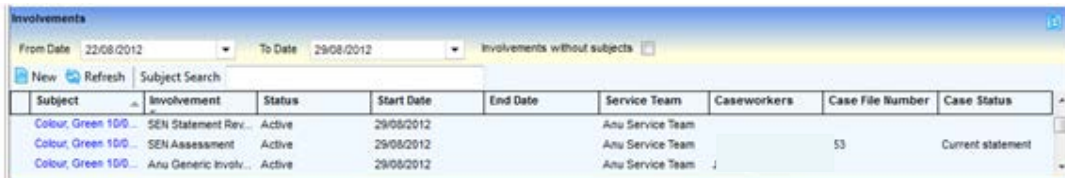
After you have selected your criteria in the **Service Team** panel at the top of the screen, use the filters in the **Involvements** panel to refine your search.

- **From** and **To Date** range filter – this filter consists of two fields that you can use to enter a **From** and **To Date**. This enables you to filter the involvements to display only those records where the start date is within a specific date range. When you initially access the **Involvements** tab these fields are populated with a default date range. The **From Date** field is set to today's date minus the number of days in the `INV_FILTER` value (set in **LA Default** tab in v3 System Administration module). The **To Date** field is set to today's date. To use this filter, enter **From Date** and **To Date** then click the **Refresh** button. The **From Date** cannot be after the **To Date**. If you enter a **To Date** you must enter a **From Date**.

- **LA Default INV_FILTER** (LA Default From day filter in Involvement)
  The `INV_FILTER` is a LA Default that is used to calculate the default date range of the involvements displayed in the **Involvements** panel. It is also used by the **Involvements** tab of the **Team Workload** page in CSS Online. The value in this parameter is a number of days. Use this filter to limit the number of involvements returned to the users, for example, to the last 10 days. Your System Administrator can set this value in the **LA Defaults** tab of the System Administration module.

  This following screen shot is of the **LA Defaults** tab.
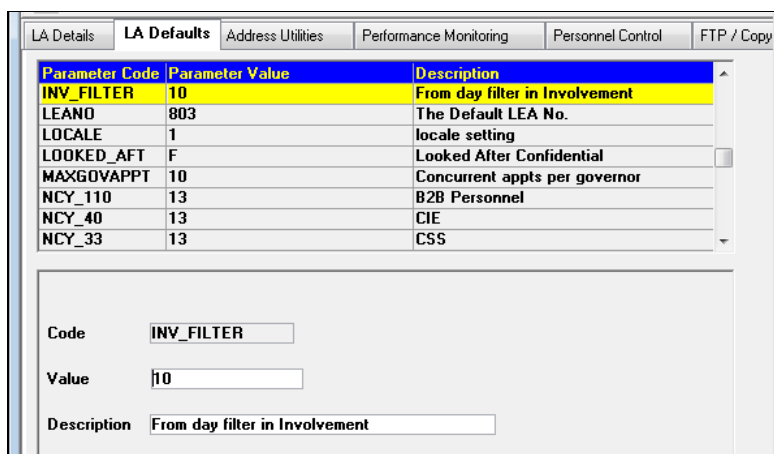
- **Involvements Without Subjects** check box – select this check box, then click the **Refresh** button to display involvements only for the specified date range that have no subjects.
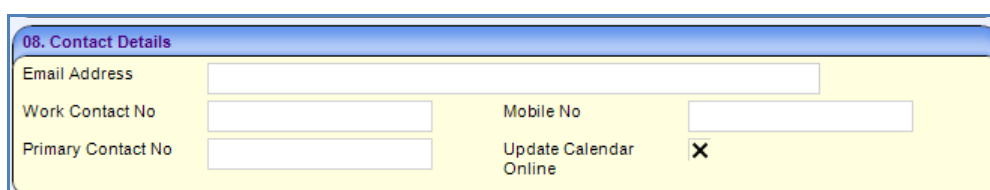
Activities

KB107550 – Link People Panel Not Populating When Activity Created Via Involvements

Previously, if you created a new activity via the **Involvement | Activity Details** screen, One only populated the activity owner into the **Linked People** panel. From this release, when you create an activity by navigating to the **Activity Details** screen from an involvement, One populates both the **Activity Owner** and the **Subject** of the involvement into the **Linked People** panel.

KB108220 / KB95659 / KB101031 – Disabling Activities Synchronising With Outlook Calendar

Automatic synchronisation of activities with Outlook calendars can now be disabled when required. In the **Person Details** screen an **Update Calendar Online** check box has been added to the **Contact Details** panel that enables you to specify whether or not activities are automatically synchronised with Outlook. By default, this check box is not selected. The following screen shot below provides an example of this check box.

If your authority has Outlook synchronisation set up in the CCS Configuration Utility (this is set up by your System Administrator) and there is an email recorded in the Person Details screen for a person, each time you create an activity One automatically attempts to synchronise this activity with Outlook. Now, if the **Update Calendar Online** check box is not selected One will not attempt this synchronisation.

Involvements

KB108563 – Involvement Subject Panel Opened Person Details for Student

The **Involvements | Subjects** panel lists the subjects of the involvement. The Subjects panel contains a **Details** button that enables you to access the subject's details. Previously, when you highlighted a subject and clicked the **Details** button, the **Person Details** screen opened. From this release if the subject is a student, clicking the **Details** button displays the **Student Details** screen; otherwise the **Person Details** screen is displayed.

KB99688 – Inactive Workflow Button Displaying in Involvements

Previously, in the **Involvement Summary | Involvement Details** screen and panel, a **Workflow** button was displayed. Because this button is part of the Children's Social Care (ICS) functionality, it was inactive. This button is now hidden in CSS Involvement screens.

KB107326 – Workflow Timeout Inner Exception Error Message When Saving Involvement With Timeline

When a user attempts to save a timeline against an involvement, the following error message is displayed:

> Workflow changes could not be saved - inner exception message:
> the request channel timed out while waiting for a reply.

This was an intermittent timeout issue that occurred when there were a large number of records in the timelines database. In this release, work to improve the performance on this SQL Server (Tracking Store Database) by providing better indexing has been completed. This reduces the likelihood of timeouts when saving timelines.

KB119096 – Caseworker Roles not Saving in Involvement

Previously, if you recorded a caseworker with multiple roles in an involvement, then the role that was displayed for them when they were added may not have been the role that displayed when the involvement was accessed after saving. From this release, when you create an involvement, the role that displays for the caseworker is now saved against the involvement. In addition, if you open any existing involvement and there is no role recorded for the caseworker against that involvement, then One will display the caseworker's oldest current post.

KB114614 – SEN Primary Needs Not Populating into Open CSS Involvements

If you record a SEN Assessment for a student, then One automatically populates the **SEN Primary Need** and **Medical Need** details from the SEN assessment into any CSS generic involvements created after this record. However, previously any CSS generic involvements created before the SEN assessment were not updated with this information. From this release, when a SEN assessment is created for a student, any existing CSS generic involvements will also be automatically updated with the SEN **Primary Need** and **Medical Need** details. This information will be populated into the **SEN Summary** panels of the CSS generic involvement. The following screen shot is an example of the **SEN Summary** screen.

06. SEN Summary - LA SEN Assessment	
SEN Category	Cognition and Learning
Status	Current statement
Needs	Autistic Spectrum Disorder
Medical Needs	Dyslexia

07. SEN Summary - LA SEN Assessment	
Additional Needs	Beh, Emotional and Social Diff 0
Additional Medical Needs	Williams Syndrome 0

SEN Assessments, Reviews & Tribunals

KB90199 – SEN Tribunal Created from Involvement Summary Cannot Be Saved

There are two ways to create a SEN tribunal record. You can open an existing SEN assessment and click on the **Add** button in the **SEN Tribunal** panel. The tribunal is automatically associated with the SEN assessment from which you have navigated. This SEN assessment does not have to be set to any particular status for the tribunal to save successfully. You can also create a SEN tribunal from the **Involvement Summary** screen, by clicking the **New** button. In this case, you must manually link the tribunal to a SEN assessment. Previously, if the SEN assessment was not completed or withdrawn, you could not save the new SEN tribunal. From this release, any SEN assessment can be linked to the SEN tribunal and the record will be saved successfully.

KB102621 – SEN Assessment With Type That is External Code OLF

Previously, if you created a SEN assessment with a type that was mapped to the OLF external code, you had to enter all the details in the **SEN Assessment | Assessment Details** panel and the **SEN Assessment | Statement Details** panel before you could enter the **Final Date**. From this release, for this type of SEN assessment, once you have entered the **Assessment Details | Received Date**, you can then select the **Completed** check box and enter the **Statement Details | Final Date**.

KB118279 – Completed Check Box Becomes Unticked After Saving SEN Assessment

Previously, if you created a SEN assessment involvement and selected a source with a P external code in Lookup 1052 - Involvement Source (for example Parent/Carer), then in the **SEN Assessment | Assessment Details** panel, if you ticked the **Completed** field and entered a **Completed Date** and saved the record, the **Completed** field changed to **X**. This then prevented you from entering any details in the **SEN Assessment | Statement Details** panel. This issue has now been fixed.

KB107048 – Access to Memo Buttons in SEN Assessment

Previously, in the **SEN Assessment: Assessment Details** panel (Panel 9) of the **SEN Assessment Details** screen, the **Summary Memo** button and the **Educational Psychologist Memo** button were only enabled if you logged on using a System Administrator user id. This has now been changed. If your System Administrator gives you read/write permissions to the 'Assessment Summary Memo' and/or the 'Assessment Educational Psychologists Memo' Secured Data entities in the User Group Permissions screen, when you open the SEN Assessment Involvement screen theses buttons will be enabled.

Caseworkers Copied from SEN Review to SEN Review

Once certain fields in a SEN assessment or a SEN review are entered and the record is saved, One displays a **Create Next Review** message. This message gives you the option to have the next review automatically created by the system for the student. In this case, if the SEN review is created from the SEN assessment, One automatically copies the subject, admin officer and caseworkers from the assessment to the review. Previously, when a review was created in this way, the caseworkers were not copied to the new record. From this release, when the next review is created, any current or future caseworkers from the existing review are copied to the new review. The start date for the caseworkers in the new record will be set to the start date of that review. In addition, the caseworker that is flagged as the lead caseworker in the existing SEN review record will be flagged as the lead caseworker in the new SEN review record.

KB100727 – SEN Assessment Progress Continues to Count Down Once Involvement is Inactive

The **SEN Assessment Details | SEN Assessment Progress** panel shows the number of days remaining for each phase of the SEN process. Previously, when a SEN assessment was made inactive, the **Days Remaining** field in this panel continued to count down. This meant that the value for the number of days could show as a negative value even if the SEN assessment was made inactive before the due date for a phase. This issue has now been resolved; when you make a SEN assessment inactive, the days remaining for the phase in which this is done is set to zero and for any subsequent phases the days remaining is set to blank.

KB119741 – SEN Assessment Progress in a LA Transfer Continues to Count Down Once Involvement is Completed

Previously, if you completed a SEN assessment of a type **LA Transfer**, the values displayed in the **SEN Assessment Progress** panel for phase 2, phase 3a and phase 3b were displaying correctly. However, phase 1 was continuing to count down, even though the child had already been Statemented. This has now been resolved.

Communications Log

KB107067 – Communication Logs Generated from Timelines Created Without a Log Time

An involvement can have a timeline associated with it. This timeline can contain a type of activity that enables you to generate a communication log directly from within the timeline. Previously, when you generated a communication log in this way, One only recorded a log date for the new communication log created. This has been changed so that when a communication log is generated from a timeline; both a log date and a log time are recorded.

KB101030 – Cannot Record Category for a Communication Log Type of Email

Previously, when you created a communication log via an involvement, if the **Type** was email (either inbound or outbound) you could not record the **Category**. This field was only visible for the other types of communication log. In this release, the field **Category** is also displayed for the communication log type of email.

KB109739 – Inactive Caseworkers Included in Involvement Communication Logs

Previously, when you created a communication log from an involvement, the system copied all caseworkers to the new communication log, even if the caseworker was no longer active in that involvement. From this release when you create a new communication log in this way, One copies only the current caseworkers from the involvement.

KB119341 – Communication Log Key Contacts Not Respecting ACLs

When you create a communication log, you can use the **Key Contacts** window to add the **Recipients** and **Senders**. The **Key Contacts** window is accessed by clicking the **Add** button in the **Subjects To** and **From** panel and lists the caseworkers and admin officers available for the communication log. Previously, any Access Control Lists (ACLs) that were set up against a service team, involvement or person were not being respected in the **Key Contacts** window. This meant that caseworkers and admin officers from service teams where these were defined were still displayed in the **Key Contacts** window, even if a user did not have appropriate access rights to see them. From this release any ACLs of this type are also passed through to the key contacts in the communication log and these persons are hidden if appropriate.

CSS User Defined Lookup Tables

KB104563 – Post Migration of v3 to v4 CSS User Defined Lookup Tables Are No Longer Accessible

Previously when CSS was migrated from v3 to v4, any CSS user defined lookup tables which were created in v3 could not be accessed from v4 after the migration. This issue has now been fixed. Lookup tables can be accessed in v4 via **Tools | Administration | Lookups**.

Workflow Management - Timelines

A performance enhancement has been implemented to shorten the time to save timeline activities in Timelines Online. This change also improves Timeline performance in the v4 Client. Performance is improved because the timelines reporting data, which used to be transferred automatically to the Oracle tables each time an activity was completed or skipped in the client, is now transferred using a scheduled task. Capita One recommend you run the transfer task twice daily at 1 a.m. and 1 p.m.

Although the default is now to use a scheduled task to transfer timeline reporting data, you can configure One to transfer this information each time an activity is completed or skipped. Please see *Setting the Status of the Timeline Data Transfer Facility* for more information.

Please note completed timeline activities will continue to be saved in real time when saving from Timelines Client and Timelines Online. This change does <u>not</u> mean that completed or skipped timeline activities will only be saved periodically. However, <u>some of the reporting data associated with a completed or skipped timeline activity will now be saved on a scheduled basis rather than continuously.</u>

For example, the data needed for management information purposes about which activities on a timeline were completed late or early is not stored in the SQL Tracking database that runs Timelines; as this only stores the activity ID and the actual completion date. Therefore tables in Oracle were created that are written to for each completed or skipped timeline activity so that when you wish to generate reports showing which activities are outstanding or completed for a timeline, the correct reporting data is available. It is these Oracle tables which will be updated on a schedule.

The activity status will always be shown correctly in the timeline itself, but if you produce reports, the data may show a slightly different status than that shown on the timeline, depending on the time at which the reporting data was last saved to the Oracle database.

Setting the Status of the Timeline Data Transfer Facility

The setting TIMELINEDATATRANSFER found within Application.ini, will be set by Capita in One 3.49, as FALSE. If synchronised data is preferred to faster performance, you can change this setting to TRUE via the Configuration Management tool.

Individual Local Authorities who may have raised cases about poor performance in the past may know that this setting used to be available on each individual client machine in the icssettings.ini. This has been changed to a global setting for One 3.49 on the application server to reduce the administrative overhead of setting this for each individual user. This global setting is FALSE by default from One 3.49, but may be changed to TRUE via the Configuration Management tool. The global setting will overrides any individual client settings.

Creating the Scheduled Task to Transfer Timelines Reporting Data

If you leave the setting TIMELINEDATATRANSFER as FALSE, then you <u>must</u> create a scheduled task that transfers the data periodically (unless you never want to report on Timelines). Capita have created the task to be used, but each LA must set this task up for themselves.

1. Select **Tools | Administration | Schedule Task** to display the **Schedule Task** page.

2. Click the **New** button.

3. Enter a **Name** (e.g. Transfer Timelines Reporting Data).

4. Enter a Description.

5. Ensure the **If the task is already running, then the following rule applies** drop-down list is set to **Do not start a new instance**.

6. In the **Trigger** panel, click the **Add** button to display the **Trigger** dialog.
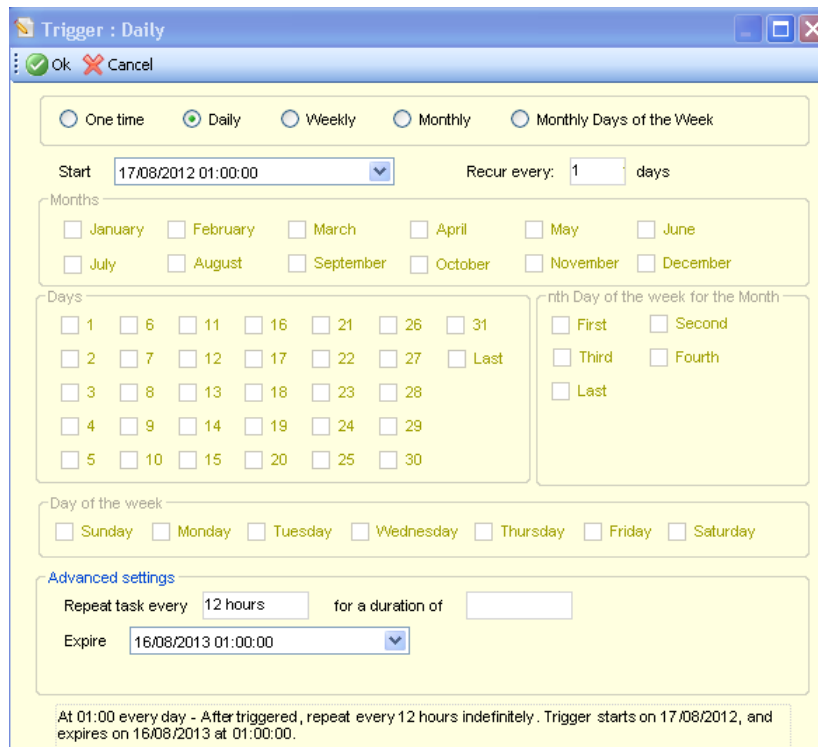
7. Select the **Daily** radio button.

8. From the **Start** drop-down list, select the date and time at which you want the task to start.

9. Ensure the **Recur** every field is set to 1 days.

10. In the **Advanced** settings area, enter 12 hours in the **Repeat Task every** field.

11. Select an **Expire** date.

12. Click the **OK** button to close the dialog.

13. In the **Actions** panel click the **Add** button.

14. From the **INSERT NAME** drop-down list, select **Transfer Timelines Reporting Data**.

15. Click the **OK** button.

16. Click the **Save** button. When prompted, select tomorrow's date or whichever date you wish the scheduled task to commence.

Inner Exception Message

An Inner Exception Message is displayed, which affects the MS Workflow Server, and may be seen by Timelines Online and Timelines Client users.

KB107326

If the following error message is seen:

> Date Time: DD/MM/YYYY HH:MM:SS Inner Exception Message: The request channel timed out while waiting for a reply after 00:01:00. Increase the timeout value passed to the call to Request or increase the SendTimeout value on the Binding. The time allotted to this operation may have been a portion of a longer timeout. Source: mscorlib Stack Trace.

Please contact the One Service Desk, quoting KB107326, for a script to resolve index partitioning errors associated with the Workflow Server. Until this issue is resolved permanently, this script may need to be rerun if the error re-appears.

CSS 3.49 Online

Activities

KB107550 – Link People Panel Not Populating When Activity Created Via Involvements

Previously, if you created a new activity by navigating to the **Activity Details** screen from an involvement, One only populated the Activity Owner into the **Linked People** panel. In this release, this functionality has been changed. When you create an activity by navigating to the **Activity Details** screen from an involvement, One populates both the Activity Owner and the subject of the involvement into the **Linked People** panel.

Communications Log

KB109739 – Inactive Caseworkers Included in Involvement Communication Logs

Previously, when you created a communication log from an involvement, One copied all caseworkers to the new communication log, even if the caseworker was no longer active in that involvement. In this release, when you create a new communication log in this way, One copies only the current caseworkers from the involvement.

CSS Online Data Panels

KB116323 – Hiding Data Panels in Involvements and Activities not Functioning Correctly

The individual data panels within an involvement and an activity can be set up so that they do not display for specific user groups. This is set up in the v4 client by your system administrator. After this has been done for a panel, the display of the panel, in both the v4 client and CSS online, is affected. In v4 client, the panel will no longer be visible. In CSS Online, the panel will display no data with the message:

> The data panel is not available for the user group.

Previously this functionality was not working correctly in CSS Online for all the panels on the **Involvement** page and **Activity** page. This issue has now been resolved.

Involvements

KB117430 – Choose an Involvement Form Pop-up Window Displays a Maximum of 14 Involvement Templates

If you are a member of a service team that has more than one type of generic involvement template, when you create a new involvement the **Choose an Involvement Form** pop up window displays. This window enables you to select the type of involvement you wish to create. Previously, if you had access to more than 14 different involvement templates, then you could not see all these templates. In this release, a scrollbar has been added to the side of this pop up window that you can use to scroll up and down. This enables you to view and select all the involvement templates.

Workflow Management - Timelines

Introduction

Release One 3.49 sees the introduction of Timelines Online, an integral part of CSS Online. A timeline that has been designed in **v4 Client | Timeline Design**, can now be linked to an online involvement and all the activities on the timeline can then be completed or skipped online.

Functionality Available in CSS Timelines Online

Timelines Online includes the following functionality:

Link Timeline to Involvement

- Choose School Day Base or Working Hours Base.

View Timeline

- Timeline is shown in a hierarchical tree view.

- Activity Properties and Status shown on dynamic hover hints.

- Grouping Activities (Limit, Parallel, Sequence, Branch Activities, Correspondence), sometimes referred to as container activities, can be shown in expanded view or collapsed view.

- Timeline progress bar and status icon are displayed.

- Timeline displayed alongside the **Involvement Summary** panel.

- Timeline **Start** and **End Dates** are displayed

- The next Activities for completion are indicated by a green background.

- Hide completed or skipped activities option.

Complete Activity including option to Re-calculate subsequent Activities

- Completed activities display **Completed** text and **Completion Date**.

- Overdue activities display in red text.

- Overdue Limit activities show how many days the limit is exceeded by.

Skip Activity

- Skipped activities display **Skipped** text and **Skipped Date**.

- Cancel activity option.

Re-Plan Activity

- Available for activities that are not yet started.

Add Activity at run time (simple Activities only)

- New activities can be added above or below an existing activity.

Generate Correspondence (Crystal Reports/Letters only)

- **Generate All** and **Generate** individual options.

- **Export Letter/Report** option.

- **Print Letter/Report** option.

- **Print Timeline** option (print screen option only).

- **Choose Recipient** at run time – search all People or Key Contacts.

- **Log Response**.

- **Send Reminders**.

- Auto create entry in **Communications Log** panel.

- A letter or report is uploaded to One via the **Linked Document** functionality.

Stop Workflow

- Workflow shows as **Completed** when **Stop Workflow** activity is used

For detailed guidance on using Timelines Online, please see the *Workflow Management - Timelines Handbook* which is on the One 3.49 DVD (Online) in the Documentation folder and also on SupportNet.

Functionality Unavailable in CSS Timelines Online

The following features of v4 Client CSS Timelines are not available in v4 Online CSS Timelines:

- Auto population of School Day Base when linking a Timeline to an Involvement, you must select a base manually.

- Displaying the selected School Base in the **Involvement Summary** panel.

- Display of timeline status icon against the involvement on **My Workload** or **Service Team Workload**.

- Generating quick reports.

- Generating emails.

- Adding other activity types at run time (other than simple activities).

- Adding extra letters to an existing correspondence activity at run time.

- SEN involvements and timelines.

- Re-activate functionality.

Permissions for Timelines Online

The **Timeline Online** functionality is enabled via **Tools | Permissions | User Group Processes| CSS Administration | Involvements** business process. The permissions set for involvements will apply to both v4 Client and v4 Online.

A user group with read permission on the involvements business process can view involvements and their linked timelines.

A user group with read/write permission on the involvements business process can view and edit involvements and their linked timelines.

Inner Exception Message

An Inner Exception Message is displayed, which affects the MS Workflow Server, and may be seen by Timelines Online and Timelines Client users.

KB107326

If the following error message is seen:-

> Date Time: DD/MM/YYYY HH:MM:SS Inner Exception Message: The request channel timed out while waiting for a reply after 00:01:00. Increase the timeout value passed to the call to Request or increase the SendTimeout value on the Binding. The time allotted to this operation may have been a portion of a longer timeout. Source: mscorlib Stack Trace.

Please contact the One Service Desk, quoting KB107326, for a script to resolve index partitioning errors associated with the Workflow Server. Until this issue is resolved permanently, this script may need to be rerun if the error re-appears.

CSS/SEN 3.48

In **One** 3.48 of v4 Client SEN & CSS, a number of defects have been addressed. The details of these changes are provided below.

Involvements

KB111275 – 'Create Next Review' Message Not Displaying in SEN Review if 'Response Complete' Date Before 'Review Date'

When you record a SEN Review Involvement, if you enter all the required fields including the 'Response Complete' date, then save the record, the 'Create SEN Review' message displays. This message gives you the option to create another SEN Review from the existing SEN Review. Previously, if you entered a 'Response Complete' date that was before the 'Review Date' then the prompt to 'Create Next Review' did not display.

This has now been changed so that, irrespective of whether the 'Response Date' is before or after the 'Review Date', the 'Create Next Review' message displays when the review is completed.

KB98022 - Text Changed For Limit Activities in Timeline to Improve Usability and Clarity

Timelines attached to Involvements can consist of a number of different types of Timeline Activities, including a Limit Activity. This type of Timeline Activity is used as a container to allow you to group a set of activities together which need to be completed within a specific time period. When a Timeline is attached to an Involvement the system calculates the date for the Limit. This 'Limit Date' is the date when the limit will be exceeded and the completion of the group of activities will become overdue.

In previous releases of v4 Client the text that displayed for a Limit Activity was as follows:

Name of Limit - Start Date: dd/mm/yyyy - Limit Date: dd/mm/yyyy - *nn* days remaining
(where *nn* is the number of days remaining until the limit is exceeded)

For example:

26 Weeks Limit Final Statement: 26/03/2012 – Limit Date: 24/09/2012 – 182 days remaining

Once the limit was exceeded then the text displayed as follows:

Name of Limit - Start Date: dd/mm/yyyy - Limit Date: dd/mm/yyyy - Limit exceeded by: *nn* days

For example:

26 Weeks Limit Final Statement: 26/03/2012 – Limit Date: 24/09/2012 – Limit exceeded by: 5 days

The wording of this text has been changed in this release to provide more clarity about what the 'Limit Date' is indicating. The text for a Limit Activity in a timeline has been changed from 'Limit Date' to 'Overdue on:' and from '*nn* days remaining' to 'Limit Exceeded in *nn* days'.

This means that a Limit in a Timeline displays as follows:

Name of Limit - Start Date: dd/mm/yyyy - Overdue on: dd/mm/yyyy - Limit Exceeded in *nn* days

For example:

26 Weeks Limit Final Statement: 26/03/2012 – Overdue on: 24/09/2012 – Limit Exceeded in 182 days

Once the limit is exceeded then the text displays as:

Name of Limit - Start Date: dd/mm/yyyy - Overdue on: dd/mm/yyyy - Limit exceeded by: *nn* days

Notes:

- There is no issue with how the system is calculating the date for the limit for the Timeline.

- The 'Due Date' and 'Days Remaining' that display in the SEN Assessment Progress Panel in a SEN Assessment Involvement are calculated in a different way to Limit dates in Timelines. The 'Due Date' is the last day that each phase of the SEN process can be finished and not when the phase is exceeded.

- The change in wording is to avoid confusion in the values displayed in these separate processes (Timelines and SEN).

Provisions

KB115111 - Negative Values in Edited Estimate Field of a Provision Charge Cost Record

In the Provision Allocation screen | Panel 02, Charge/Cost Details shows a list of the Charge Cost records for the Provision. From this panel you can view the details of a particular Charge Cost record using the '**Edit**' button; clicking this button displays the Provision Charge Cost Details popup window.

Previously you could not enter a negative value into the 'Edited Estimate' field in this window. This has now been changed. You can now enter a value in this field that is between -99999999999.99 and 999999999999.99.

SEN NI 103

KB104739 - SEN NI 103 Report: Not All Students Included Within a Category

The SEN NI 103 Statutory Report is a Crystal Report. In v4 Client it is run from the Reports screen (accessed via Focus | Analysis Reporting | Report). Previously there was an issue in the Report where students were not always listed under a Category heading and therefore not correctly included in the figures. This was caused by the SEN NI 103 Report in v4 incorrectly checking the old v3 Lookup for the Source.

In the SEN NI 103 Report, students who have had a SEN Assessment recorded during the date range selected for the Report are listed under Category headings (A, B, C, D) based on the 'Source' that was recorded in the involvement for that student. In v4, the 'Source' field displays in the SEN Assessment Involvement | Assessment Details panel of the SEN Assessment Screen. This field in v4 uses *Lookup 1052* – Involvement Source.

You could previously record SEN Assessments in the SEN module of v3. However, in v3 a different Lookup (*Lookup 0122* – Request Source) was used when recording the source for a SEN Assessment.

When v4 was introduced some Lookups previously used in v3 were revised, this included the v3 *Lookup 0122* – Request Source. When v3 is migrated to v4, as part of this process, the Codes and Values that are in the v3 *Lookup 0122* (Request Source) are merged with the v3 Lookup for CSS Referral Source and are then copied into the v4 *Lookup 1052* – Involvement Source.

Until this release of v4 Client, the SEN NI 103 Report was using a Crystal Report query that was checking the Source that was recorded for the student's SEN Assessment against the v3 *Lookup 0122* (Request Source Lookup) to determine which Category heading (A, B, C or D) to list the student under. This meant that if your Authority had created any new 'Sources' in the v4 *Lookup 1052* that did not previously exist in the v3 *Lookup 0122*, any students recorded against those new Sources were not appearing under a Category in the SEN NI 103 report when it was run in v4 Client. This has now been corrected and the Report is now checking the v4 *Lookup 1052* (Involvement Source) to identify which Category each student should be included in.

Note: Your authority will only be affected by this issue if you are using Sources for your SEN Assessment (set up in v4 *Lookup 1052 - Involvement Source*), that were not previously used in v3 (set up in v3 *Lookup 0122 - Request Source*).

Workflow Management – Timelines

Unfortunately, during final testing, we have identified that Workflow Management - Timelines Online is not performing satisfactorily and is not yet suitable for general release in a live environment.

Timelines Online has therefore been hidden using a new permission '**Timelines Online**' within the **Main Business Process** of **CSS Administration**, which has been set to '**Deny**' by default. We are continuing to investigate the performance issues and will be publishing further information as soon as possible.

01. Main Processes				
Main Business Processes	CSS Administration ▾			

02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
CSS Administration			✗	
Activity Administration			✓	
Allow Activities-Sync to Outlook			✓	
Assign SLA			✓	
CSS Provision Administration			✓	
CSS Service Teams Administration		✓		
CSS Service Teams Workload	✓			
Equipment			✓	
Equipment Loan			✓	
Hearing Impairment		✓		
Involvement			✓	
Involvement Administration			✓	
Involvement Placement/Transfer			✓	
Maintain SLA			✓	
Provision Charge Type			✓	
Risk Management			✓	
SEN Administration			✓	
SEN User Defaults			✓	
Timelines Online				✓
Visual Impairment		✓		

CSS/SEN 3.47

CSS/SEN (v4 client)

In **One** 3.47 of v4 Client SEN & CSS, a number of defects have been addressed. The details of these changes are provided below.

Involvements

Involvement Form Setup

KB104035 – Selecting Reasons for an Involvement Form

Involvement Forms are set up in the CSS Involvement Forms screens (accessed via Focus | Services | CSS Involvement Forms). As part of setting up an Involvement Form, you add the involvement Reasons that will be available in the Involvement by clicking the '**Add**' button in the **Reasons** panel of the Involvement Form Details screen.
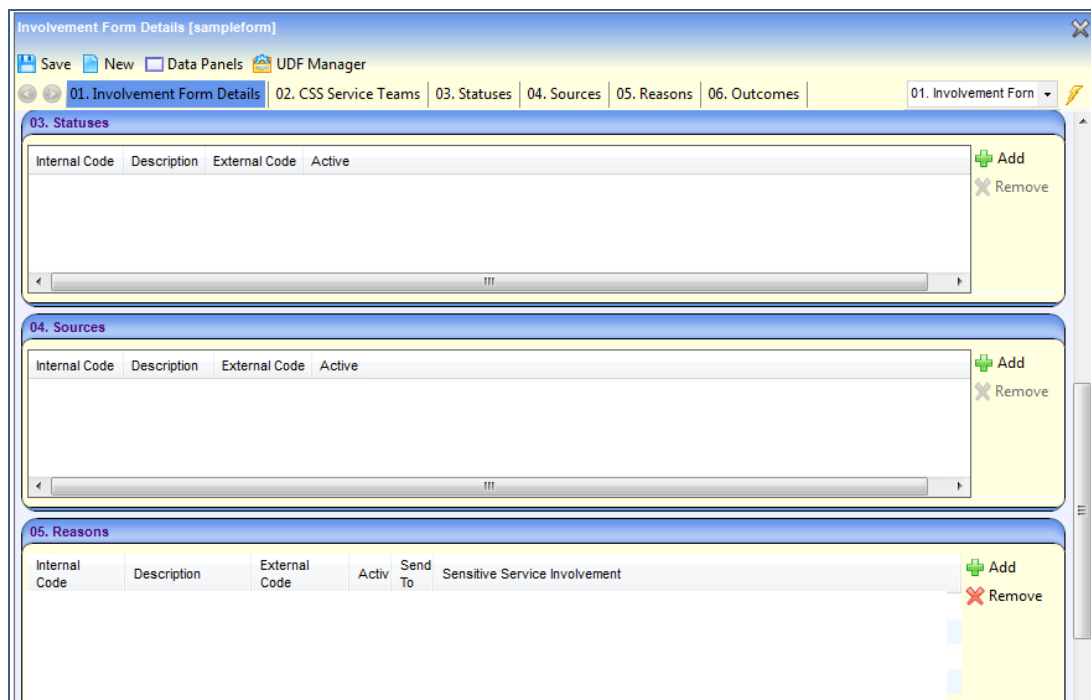
Clicking the 'Add' button opens the **Lookup Codes – Involvement Reason** window.
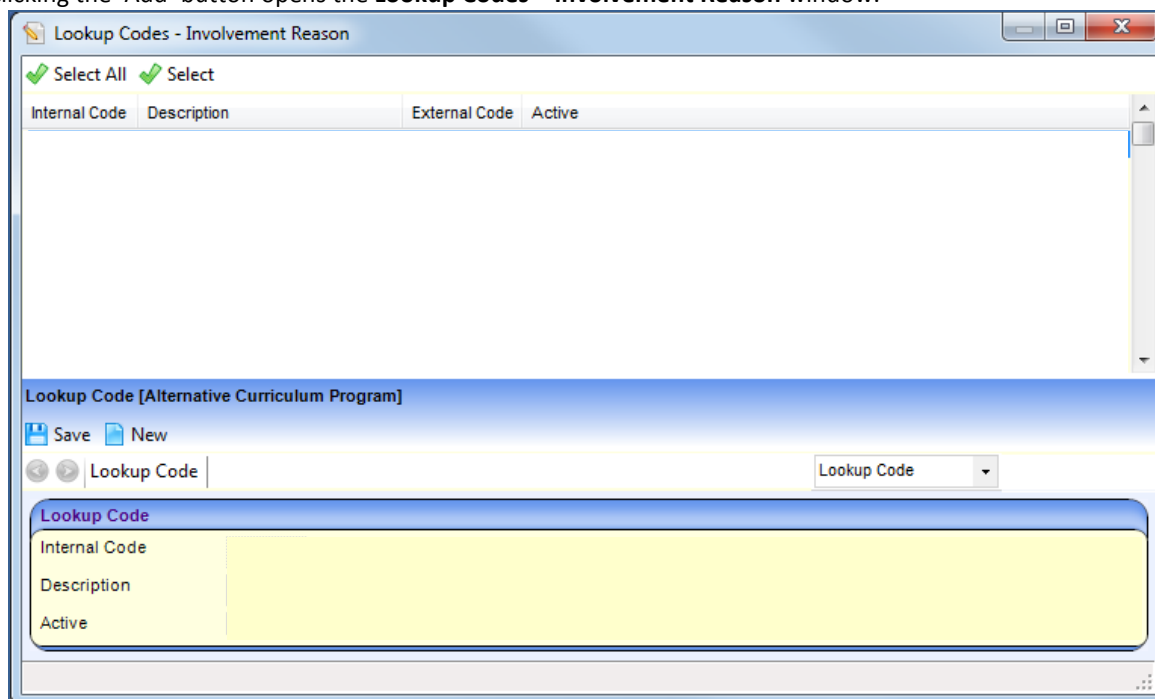
Previously if you sorted this window by the **Internal Code** column, then selected a Reason to add to the Involvement Form, the system would add a different Reason into the Reasons panel of the Involvement Form Details screen.

This has now been fixed and the selected Reason is correctly added to the Involvement Reasons panel.

Involvement Screens

KB107866 – Involvement Summary Searching
Previously in the Involvement Summary screen, when you carried out a search, the message 'Searching' was displaying at the bottom of the screen even after the search had completed.

This has now been changed to show the number of records found.

KB101415 – Status Not Displaying in Involvement Summary Screen
If you open the Involvement Summary screen (accessed via either a Person or a Student), the grid shows a list of Involvements for the selected person. For those involvements that are for a different Service Team, the 'Status' column previously displayed blank in this screen. Even though when any of these Involvements were opened the status was visible in the Involvement Details screen. In addition, if you attempted to delete one of the Involvements where the status was not visible, an error message advising that '*The value for Status is not valid*' displayed.

These issues have now been fixed. The status for these Involvements is now visible in the Involvement Summary screen and if you have the correct permissions you can delete these records.

KB98233 – Communication Log Only Enabled Once New Legal Actions Involvement Saved
In this version of the software, the Legal Action Involvement screen has been changed so that the 'Communication Log' link in the Links panel is only enabled once you have saved a new Legal Action Involvement Record. Previously this was always enabled.

SEN Review

KB105025 – Caseworkers Copied from SEN Assessment to SEN Review

If you create a SEN Assessment, enter all required fields and enter a Final Date, then save the record, the 'Create SEN Review' message displays. This message gives you the option to create a SEN Review from the SEN Assessment. If you click 'Yes' to this message, the system asks you to enter the SEN Review details (Review Type and Review Date) and then creates a new SEN Review Involvement record for the student who is the subject of the SEN Assessment.

Previously, the system automatically copied the Subject and the Admin Officer from the SEN Assessment into the newly created SEN Review Involvement. However, the Caseworker was not copied into this new record. Now the system also copies into the SEN Officers panel (Panel 05.) of the new SEN Review Involvement record any Caseworkers from the associated SEN Assessment.
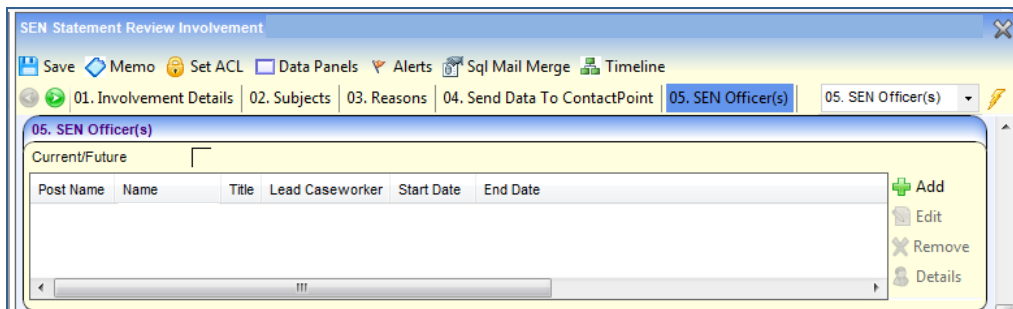
The 'Start Date' for each caseworker copied into the new record will be set to the Start Date of that SEN Review. The system does not copy to the new SEN Review record, any Caseworkers that are recorded in the SEN Assessment with an End Date. When the system copies Caseworkers from the SEN Assessment to the SEN Review, the Caseworker that is flagged as the Lead Caseworker in the SEN Assessment record is also flagged as the Lead Caseworker in the new SEN Review record.

KB109851 – Editing a SEN Review After 'Create Next Review' Message

Once certain fields in a SEN Review are entered and the record is saved, the system displays a 'Create Next Review' message. This message gives you the option to have the Next Review automatically created by the system for the student.
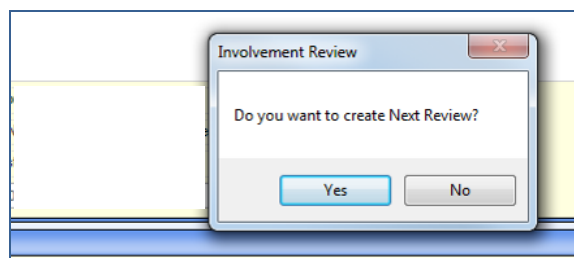
Clicking 'Yes' to this message displays a popup window allowing you to enter the details for the Next Review to be created.
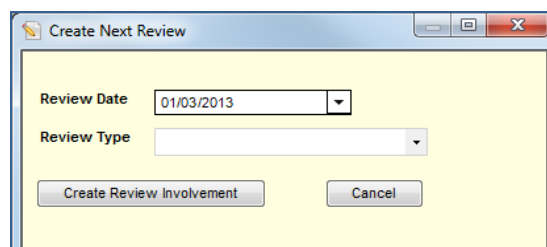
When you click on the 'Create Review Involvement' button in this popup window, you are returned to the SEN Review Involvement screen. Previously if you then edited any details in this screen, when you saved the record an error message displayed. This no longer occurs and the existing SEN Review can be updated without any issues.

SEN Assessment

KB110345 – 'LA Transfer Date' in Future

In a SEN Assessment, you could not record a future date into the 'LA Transfer Date' field. This was previously possible in SEN v3. This field has now been changed in v4 so that a date that is in the future can now be entered if the student is fully statemented (in other words, a Final Date has been recorded in the SEN Assessment).

KB109606 – Amendment Details Panel Sort Order

Previously when changes were made in the Amendment Details panel of the SEN Assessment and the screen was saved, the rows in this panel were displaying in a random order. Now, when the record is saved, this panel will be sorted in date order by 'Amendment Date'. You can then also continue to use the column headings to sort by any of the columns in this panel.

Activities

Activities Setup

KB95262 – Activity Outcomes / Aims

The CSS Service Team Definition screen allows you to define details used within the system that are specific to a particular Service Team. This previously included the Activity Outcomes / Aims. As this is a redundant part of the system and currently has no corresponding panels elsewhere in the system, this panel (Panel 12) now no longer displays in the CSS Service Team Definition screen.

KB109353 – Activity Owner as Linked People When Migrating Records from v3 to v4

In v4 client, when you create a new Activity record, the Activity Owner (displayed in Panel 01. Activity Details) is also automatically added to the Linked People panel (Panel 11. Link People).

Previously when Activity records were migrated from v3 to v4, this was not happening and the Activity Owner was not being added to the Linked People panel in the Activity record created in the v4 client.

This has now been changed and when you migrate records to v4 the new v4 Activity record will now show the Activity Owner as a Linked Person.

KB101069 - Empty Activity Lookups Causing System Error

In an Activity, you record the 'Originator' and the 'Booking Status', in the Additional Details panel (Panel 07), by clicking on the Magnifying Glass icon. This displays a popup window showing a list of values from a Lookup Table. You can then select the appropriate option.
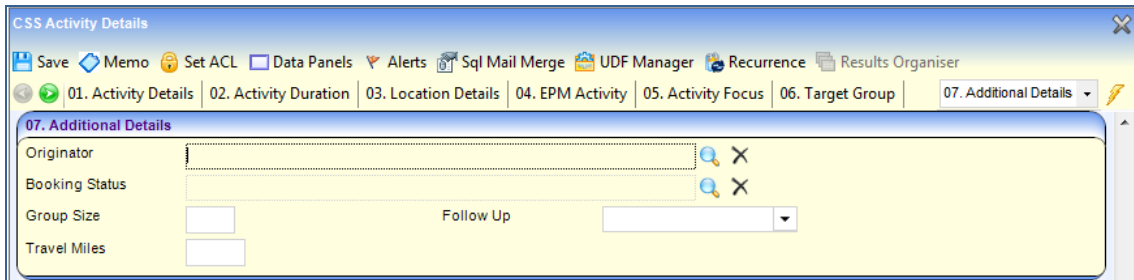
Previously, if either of the associated Lookup Tables were empty, when you clicked on the Magnifying Glass icon a system error displayed. This has now been fixed and instead a blank Lookup window displays, as shown below. In this case you should speak to your local System Administrator who can set up the required values in the corresponding Lookup Table.
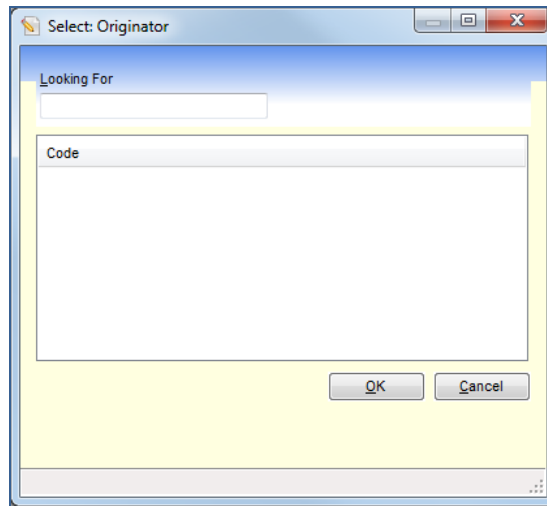
Activity Screens

KB110087 – Base Column Added to all Activity Summary Screens

In all Activity Summary screens a 'Base' column has been added. This column shows the base where the Activity took place. This new column has also been included in the My Activities panel of the Home Page and the Activities panel of the Service Team Workload page.

The screen shot below shows an example of how this displays in the Activity Enquiry screen.
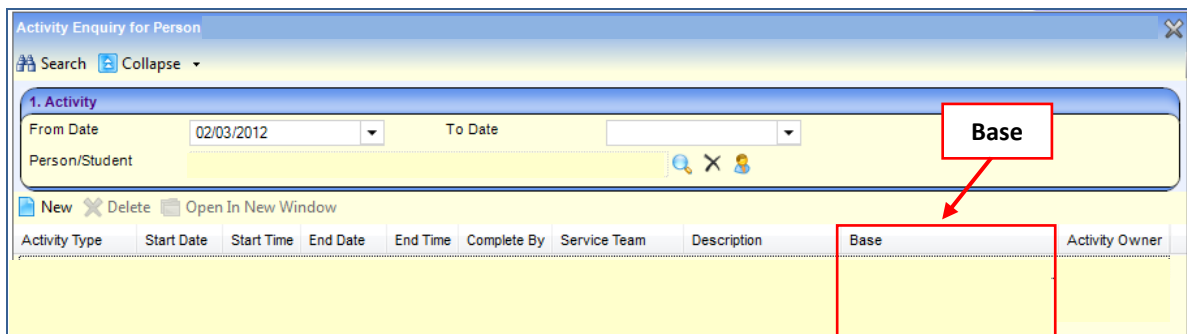
KB99045 - Select Address Button Enabled When Creating a New Activity

Previously, when you created a new activity the 'Select Address' button in the Location Details panel (Panel 03.) was disabled until you had saved this new record. This button has been changed and is now enabled before saving the record.
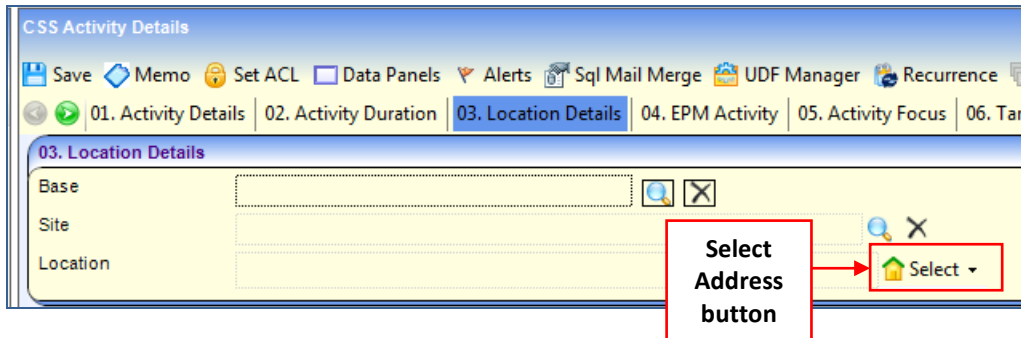
KB103180 – Error When Adding Memos to Link People then Updating Date or Time

Previously, in the Link People panel (Panel 11.) of an activity, if you added a memo for one Linked Person, then edited the Start or End time or Date and then clicked on a Memo for a different Linked Person, an error message displayed. This issue has now been fixed.

KB107404 - Error When Editing Link People and LA Default 'PER_ROLE' Set to True

Previously, in the Link People panel (Panel 11.), when you selected a Linked Person then clicked the Edit button an error message was displayed. This was only occurring if your authority had set up the LA Default 'PER_ROLE' to True (this is a global setting that is set by your System Administrator when your system is initially set up). This issue is now fixed.

Linked Documents

KB101888 – Accessing Linked Documents from a Subject's Communication Log

The Communication Log screen is opened using the link in the Links panel. This link is available from several screens in the system. If you open the Communication Log screen from an Involvement, a **Subject's Log** button is available.
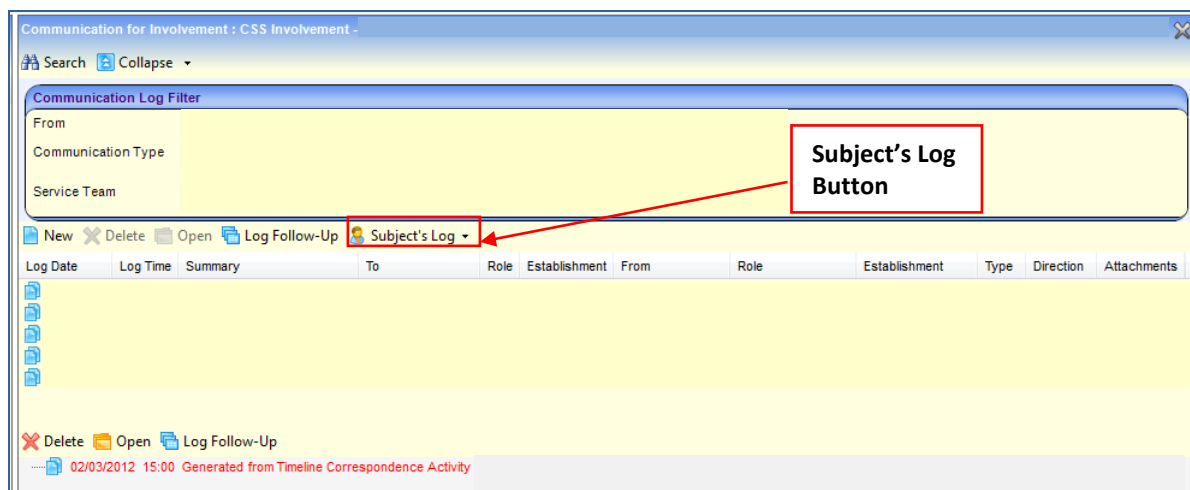
When you click on this button, a dropdown displays showing a list of the Subjects of the Involvement. Selecting one of these subjects allows you to filter the Communication Logs to show only those records associated to the selected person.
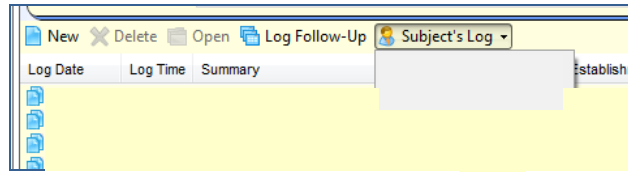
Previously, when you selected a Subject from the 'Subject's Log' dropdown, the system opened a popup window to display the person's Communication Logs. This meant that none of the Linked Documents associated with these records were visible in the Linked Documents panel and you could not access any of these documents from this Communication Log popup window.

This screen has been changed to resolve this issue. Now when you select a Subject from the 'Subject's Log' dropdown, instead of opening a popup window, the system opens a new Communication Log screen showing the specific Communication Log records for that person. This means that any associated Linked Documents can now be accessed from the Linked Documents panel.

Provisions

KB108067 – Value for Weeks Per Year in a Provision

In the Provision Allocation screen, for Provisions that used the 'Wks/Year' field, the system was previously calculating this value to 3 decimal places but displaying the value as 4 decimal places in the screen. For example, for a normal year the system was calculating the 'Weeks per Year' as 52.143 (3 decimal places) then displaying this value as 52.1430 (rounding the value up to 4 decimal places). For a Leap Year the system was calculating the 'Weeks per year' as 52.286 and displaying a value of 52.2860.

In this release this issue has now been fixed and the system now displays the true 4 decimal place value for 'Weeks per Year'. Now, for any new records created after this change, the system calculates and displays a 'Weeks per Year' value for a normal year as 52.1429 and a value for a Leap Year as 52.2857.

Any existing records that were created before this change is implemented will not be affected and will continue to show the old values unless the 'Weeks/Year' field is manually edited.
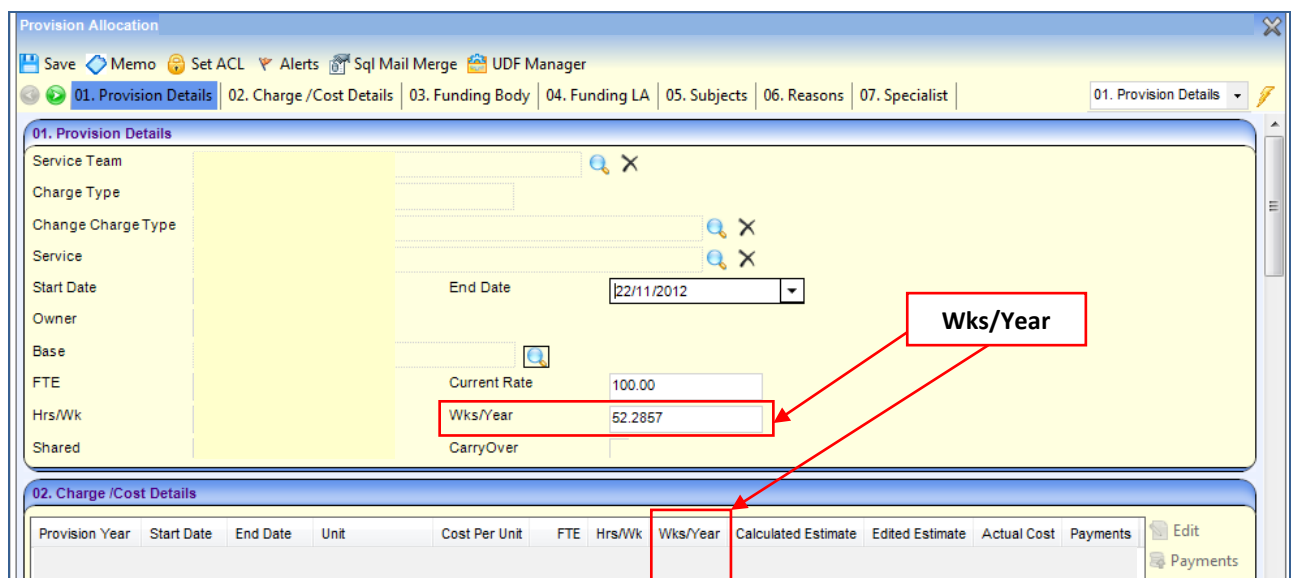
Note:

The 'Calculated Estimate' field in the Charge/Cost Details panel (Panel 02.) is automatically calculated by the system. Provision Allocation records that have the 'Wks/Year' field entered use this 'Weeks per Year' value in the calculation for the 'Calculated Estimate' field. Therefore after this change is implemented, for any new Provision Allocation records of this type that are created, the 'Calculated Estimate' field will also be affected. The impact of this change on the 'Calculated Estimate' is very small. The 'Calculated Estimate' amount will now be less than when the system used the rounded up 'Weeks per Year' value. For a normal year, the 'Calculated Estimate' amount will be 0.000192% less than would have been shown in the previous release and for a Leap year, the amount will be 0.000574% less.

Service Provider Links

Service Provider Links – End Date Must Be On or After Start Date

In this release, the Service Provider Link screen has been changed so that now the End Date must be on or after the Start Date.
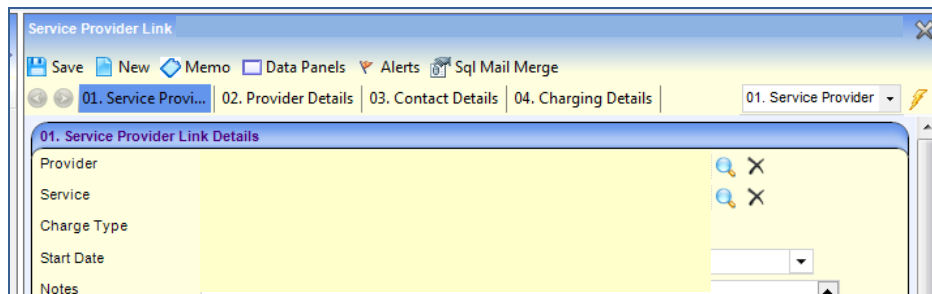
CSS/SEN 3.46

CSS/SEN (v4 client)

Detailed below are the changes made in **One** 3.46 for CSS v4 client. This includes details about the additional functionality added to the Service Team Workload page, and also changes made to the Hearing Impairment and Visual Impairment embedded screens.

Service Team Workload

Workflow Messages Panel in Service Team Workload

In **One** 3.46, a Workflow Messages panel has been added to the Service Team Workload screen. This panel allows you to view the workflow messages either for a service team or a member of a service team. This panel functions in a similar way to the My Workflow Messages panel in the My Home Page.

The Workflow Messages panel will initially display blank. To view a list of workflow messages you must first select a service team in the 'Service Team' dropdown at the top of the screen and then select either one of the following:

- Select the new 'Workflow Messages for the Service Team' filter. This will display in the Workflow Messages panel all the workflow messages for the selected service team. The screen shot below provides an example of this filter.
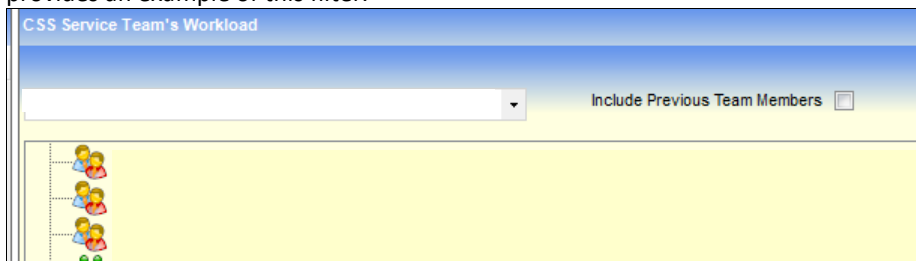
- Select a member of a service team by highlighting person that displays under a post in the team structure. The screen shot below provides an example of this filter.
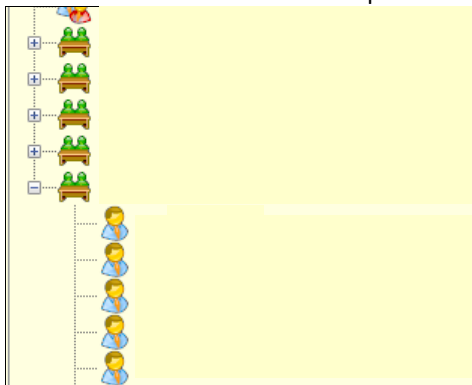
Once you have clicked on the required filter, the system will refresh the Workflow Messages panel and display the relevant messages. The screen shot below provides an example of this panel.
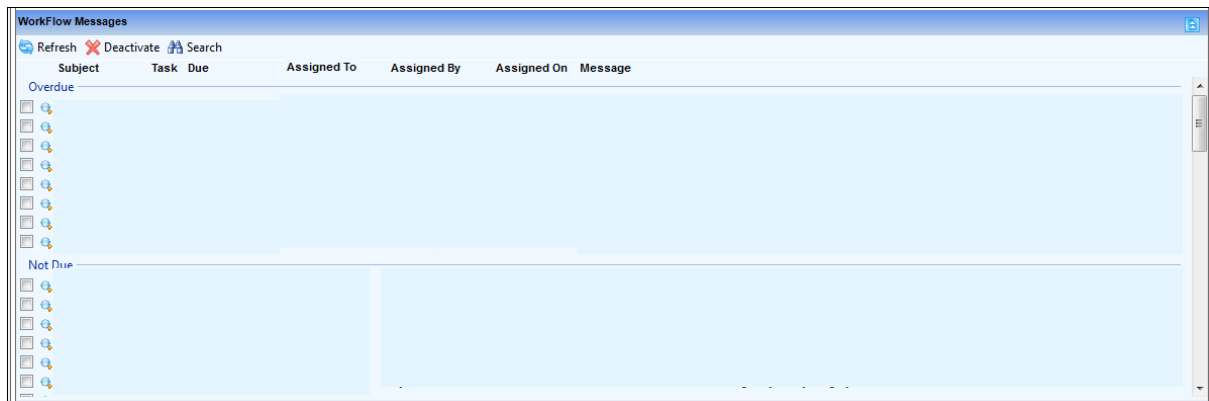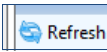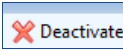
Workflow messages are grouped in the grid in the following sections:

- Due Today – shows those messages where the Due Date is today's date.

- Not Due – shows those messages where the Warning Date is before or the same as today's date and the Target Date is after today's date.

- Overdue – shows those messages where the Due Date is before today's date. In this case, the due date displays in red text.

- Actioned - shows those messages where the activity generating the message has been actioned.

- Default - shows those messages that do not have a due date.

The Workflow Messages panel shows the following details:

- Subject – the subject of the workflow message.

- Task – indicates whether the message is a task.

- Due – the due date of the message. If the due date for a message is the same as the system date then the text 'Today' will display in this column.

- Assigned To – the name of the person who the workflow message is assigned to.

- Assigned By – the name of the user who assigned the workflow message to the person.

- Assigned On – the date the message was assigned to the user.

- Message – the text of the message. You can view the full message text in the Message Details window. For further details about opening the Message Details window see below.

The following buttons and icons display in the Workflow Messages panel:

- **Refresh** button – clicking this button refreshes the Workflow Messages panel to show an up to date list of active messages based on the selected Service Team filter.

- **Deactivate** button – this button allows you to deactivate workflow messages. To deactivate messages tick the checkbox in the panel next to the relevant message. You can select one or more messages at a time. Then click the Deactivate button, this then sets the selected messages to deactivated and removes them from the panel. This does not delete these workflow messages from the database.

- **Search** button – Clicking this button opens the Workflow Message Enquiry screen. This screen allows you to search for workflow messages. This screen functions the same as if you access it from the My Workflow Messages panel of the My Home Page.

- **Open** icon – Clicking this icon opens the Message Details screen and displays the full details of the selected message. The Message Details screen functions the same as if you access it from the My Workflow Messages panel of the My Home Page.

Messages that display in blue text are associated with other records. For example, a workflow message that is generated from a timeline that is attached to an involvement will display with blue text. This blue text is a hyperlink. Clicking the hyperlink will navigate you to the associated record. The screen shot below provides examples of messages of this type.

Note: Any ACLs that have been set up only apply to the associated involvement or person details record. They do not apply to the workflow messages that display in Workflow Messages panel.

Expanding and Collapsing Service Team Workload Panels

Expand and Collapse icons have been added to each of the following panels in the Service Team Workload screen.

- Involvements

- Activities

- Workflow Messages

These icons display at the right of the blue bar of each panel and allow you to expand and collapse the related panel. When you initially access the Service Team Workload page, all the panels will be shown expanded.

In this case the Collapse icon displays. Click the collapse icon collapses the related panel and expands the other panels on the screen.

To expand a panel click the Expand icon . Clicking this icon expands the panel again.

Quick Reports

Additional Fields for Quick Reports

In **One** 3.46, the Quick Reports functionality has been enhanced. In Quick Reports, the following categories of reports have had additional fields added.

- Communication Log Correspondence

- Attendance Monitoring Correspondence

- Penalty Notice Correspondence

- Parent Contract Correspondence

- Court Order Correspondence

- Exclusions Correspondence

- Involvements Correspondence

These new fields are included in the list of fields in the Data Selection window for the report categories listed above. The Data Selection window is accessed via the 'Data' button in the Quick Reports panel. The screen shot below provides an example of the Data Selection window.
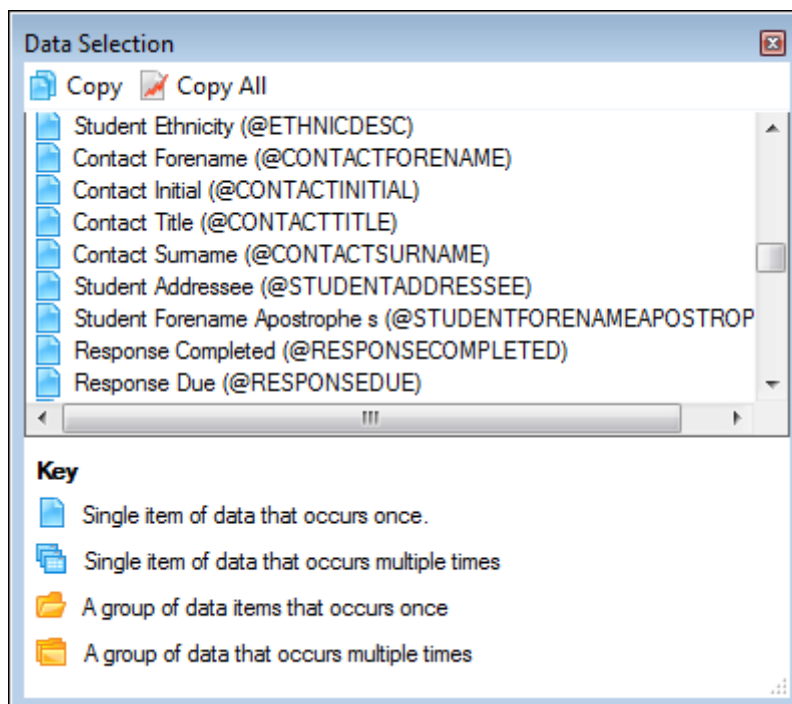
The fields that have been added to each of these categories of Quick Reports are as follows:

- Contact Initial

- Contact Forename

- Contact Title

- Contact Surname

- Contact Address Home – see below for further details about this field

- Contact Address Work – see below for further details about this field

- Student Addressee

- Student Forename Apostrophe s
  (note: in a Quick Report this field adds an apostrophe and the letter 's' to the end of the student's forename, an example of how the text would display is as follows 'Matthew's ......')

- Response Completed

- Response Due

- Official Base Name

- Admin Officer Post

- Admin Officer Title

- Admin Officer Forename

- Admin Officer Initial

- Admin Officer Surname

In addition, the following fields have been added to the Communication Log Correspondence category:

- ReviewDate

- ReviewType – This is a group of data items that occurs once and contains the following fields:

    o Review Type

    o Description

    o Next Review

    o Active

- StartDate

- MeetingDate

- Final Date (StatementCompletedDate)

Addresses in Quick Reports

To allow for greater flexibility when selecting an address for a person based on their role, the following new data fields have been added to Quick Reports:

- Contact Address Home

- Contact Address Work

These fields are populated as follows:

- Contact Address Home
  This is the current home address (where the internal code is 'H'). Where there are multiple addresses of this type recorded for a contact then the record with the most recent Start Date is used. If there are multiple addresses of this type but none have a Start Date recorded then when the report is run this field is left blank. If there are no addresses of this type recorded for the contact then the correspondence address recorded for the contact is used instead.

- Contact Address Work
  This is either the current work address (where the internal code is 'W') or the current office address (where the internal code is 'O'). Where there are multiple addresses that are either of type 'W' or 'O' recorded for a contact then the record with the most recent Start Date is used (this maybe either the record with a type 'W' or 'O' depending which has the most recent Start Date). If there are multiple addresses of these types but none have a Start Date recorded then when the report is run this field is left blank. If there are no addresses of either of these types recorded for the contact, then the correspondence address recorded for the contact is used instead.

This assumes that the internal codes for the Lookup 'Address Type' are set to the following:

- H - Home

- W - Work

- O - Office

Note: If a contact has an address that has an End Date recorded that is before today's date then the address is no longer a current address for that contact and therefore is ignored in the rules above and is not populated into the Quick Report when it is run. If an address record does not have an End Date recorded then it is considered not to have ended and is therefore a current address.

In addition to the above change, the issue in Quick Reports where addresses were not displaying in reports in the correct font type and size that was selected in the template has now been resolved.

Filename Cannot Be Greater Than 99 Characters

When you import a template into Quick Reports the filename must not be more than 99 characters. If you enter a filename that is more than 99 characters, the following message now displays:

'The filename is too long'

Note: The maximum number of characters for the full pathname including the destination folder cannot be more than 264 characters.

Filename Cannot Contain Special Characters

When you import a template into Quick Reports the filename must not contain the following special characters:

\ / : * ? ' < > |

If you enter a filename containing any of these characters, the following message now displays:

'A filename cannot contain any of the following characters: \ / : * ? ' < > |'

Action and Run Menu Options Disabled If No Category Selected

The menu options that display when you click either the Action button or the Run button in the Quick Reports panel are now disabled until you select a report category.

If the report category you select is empty, then the Run button menu options will remain disabled and the Action button menu will only have 'New' option enabled.

Equipment

Cloning Equipment Items

When you click the 'Clone' button in the Equipment Inventory screen, the Cloned Equipment Item Details screen displays. Warning messages exist for this screen that display if you attempt to save this screen and have not changed any of the following details in the cloned record:

- Inventory Number
- Security Number
- Manufacturer Serial No.

Once you have updated these details on the cloned record, save and return to the Equipment Inventory screen, the new record is correctly listed. Previously, if you then clicked on the 'Clone' button again WITHOUT first saving the Equipment Inventory screen, update the details for the second cloned record, then click 'Save' in the Cloned Equipment Item Details screen, on returning to the Equipment Inventory screen the second cloned item was listed with the correct details however the system also updated the first cloned record with the details from the second cloned item. This issue has now been resolved.

Hearing Impairment and Visual Impairment

Accessibility of Screen Content

Changes have been made in this release to ensure that the full content of the Hearing Impairment and Visual Impairment screens can be accessed when viewed in the v4 rich client and a lower screen resolution is being used. This includes scrollbars being added to the individual panels and grids that display within these screens.

UDFs

To allow easier access to UDF fields, changes have been made to various Hearing Impairment and Visual Impairment screens. Where your authority has set up UDFs, a UDFs button will display in the related panel.

UDFs are set up in the UDF Management screen of v4 Client. In this screen, the Entity Name identifies the record type. For example, CSS – Generic CSS Involvement. UDFs can then be created and then added to the various panels within the entity. In the example screen shown below the UDFs that have been added to the Hearing Loss Details panel show in red text.
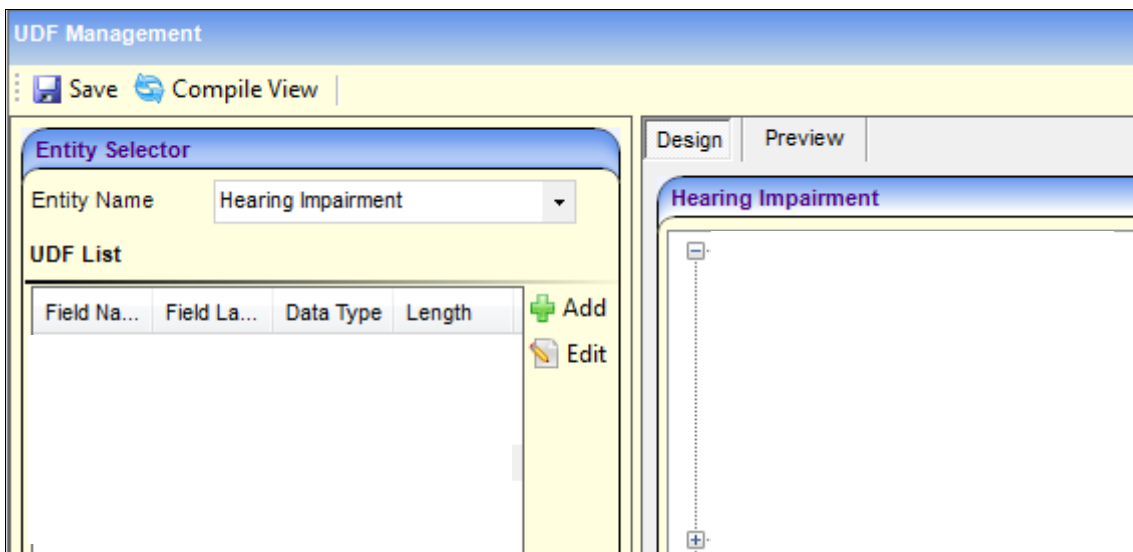
Where UDFs have been set up in this way, the corresponding panel in the screen now shows a UDFs button. This button allows you to access the UDFs set up for that panel. These UDFs will no longer display in the UDFs tab. The only UDF fields that will now display in the UDFs tab for any of the records listed above are those created under the 'User Designed Fields' heading in UDF Management screen of v4 client.

The screen shot below provides an example of the UDFs button in the Hearing Loss Details panel of the Hearing Impairment screen.
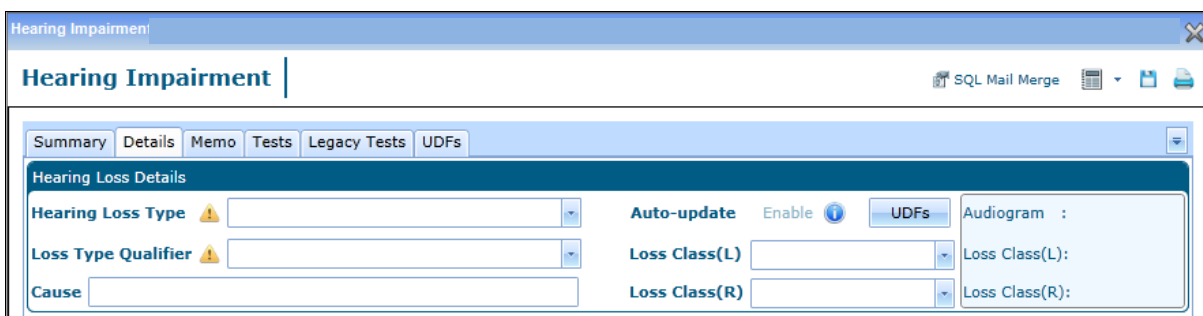
If you hover over the UDFs button a tooltip displays showing the UDF field labels for that panel and any data that has been recorded. A maximum of 10 UDFs display in the tooltip. If there are more than 10 UDF fields available, the number of additional UDFs display at the bottom of the tooltip. For example ' + 2 more...'. For any fields where a large amount of text has been enter, the field in the tooltip will be truncated and only show approximately the first 20 characters of the data. The screen shot below provides an example of the UDFs tooltip.
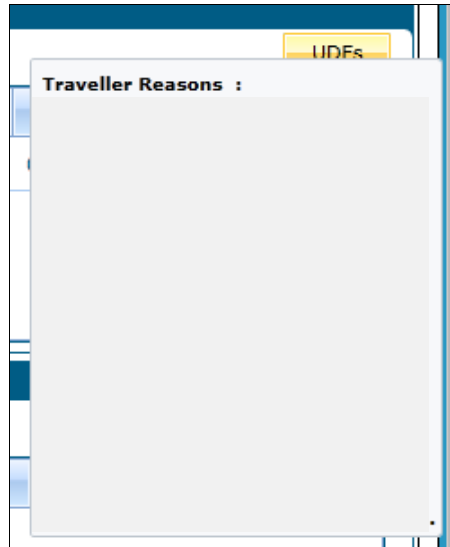
Clicking the UDFs button displays the UDFs window. This window will show all the UDF fields that have been set up for the relevant panel. An example of this window is shown below:
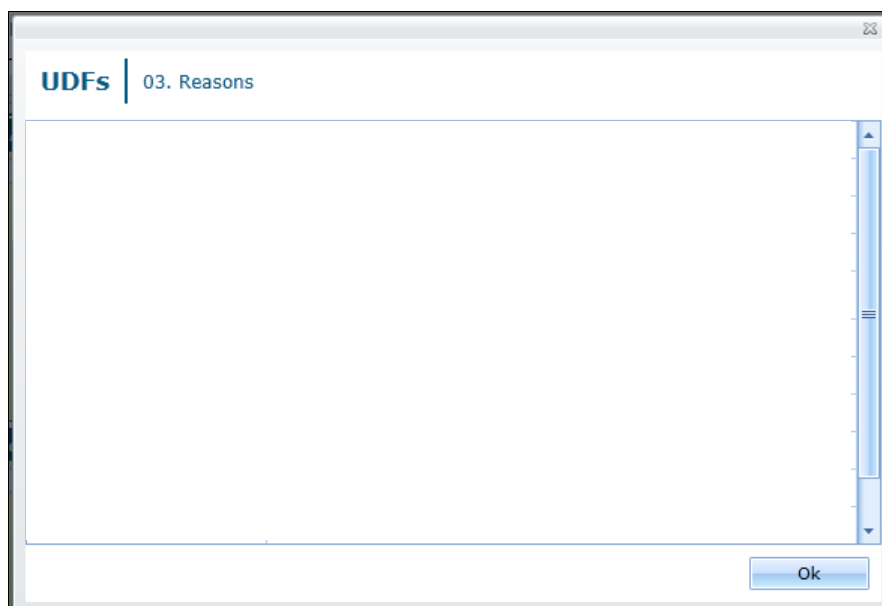
In the UDFs window, complete the fields as required and then click the OK button. The window will then close and you will be returned to the record you were viewing. You must now save this record to save the UDF field data to the database.

Provisions

The following issues in Provisions have been resolved in **One** 3.46:

- In the New Provision Allocation screen, the 'Provider and Service' Lookup is no longer disabled, even after selecting a Service Team. This previously affected this screen when accessed for Person, Student and Base.

- In the Charge/Costs Details panel (Panel 02) of the Provision Allocation Details screen, the Payment column previously showed an amount. This has now been corrected to show the payment count.

- In the Provision Allocation Details screen, if changes are made to the charge / cost details and you close the Cost Details window without saving, previously these changes were still being updated in the Charge/Costs Details panel (Panel 02). Now when you attempt to close the Cost Details window and there are unsaved changes, the follow message displays:
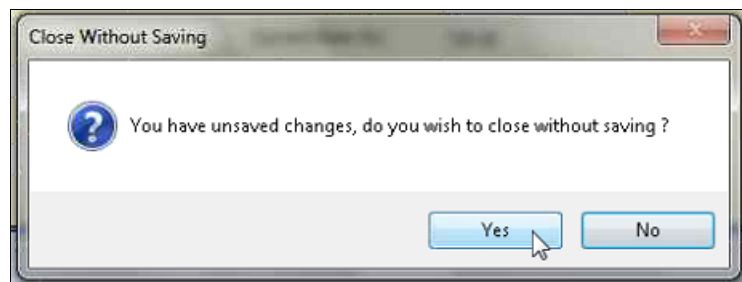
This has also implemented for Provision Funded Body window.

CSS/SEN (Online)

In **One** 3.46 of CSS Online, improvements have been included to improve navigation and access. In addition, enhancements have been made to provide greater workload functionality. This includes introducing a **Workflow Summary** into the **My Workload** page (previously My Home Page) and a **Team Workload** page. Details about these changes are provided below.

Primary Navigation Bar

In **One** 3.46 release a new primary navigation bar has been introduced to allow you to navigate more easily through the screens within CSS Online. This displays at the top of all pages within CSS Online. The screen shot below provides an example of this primary navigation bar:

The primary navigation bar contains the following options:

- **One Home** – selecting this option navigates you to the One Welcome page

- **My Workload** – this option allows you to navigate to the My Workload page (previously named My Home Page)

- **Team Workload** – this option navigates you to the Team Workload page (this page has also been introduced in this release).

- **Reports** – navigates you to the Reports page

- **Search Person** – this allows you to search for a person

- **Links** – the options that now appear on the primary navigation bar have been removed from the Links menu. This menu now only contains options that are relevant to the record you are currently viewing. For example, if you are viewing an involvement, the Links menu will contain options to navigate you to Activities, Communication Log, Hearing Impairment and Visual Impairment.

Above the primary navigation bar, text displays showing the name of the user logged into CSS Online. In addition, the following hyperlinks display:

- **Help** – click this hyperlink to display the CSS Online Help

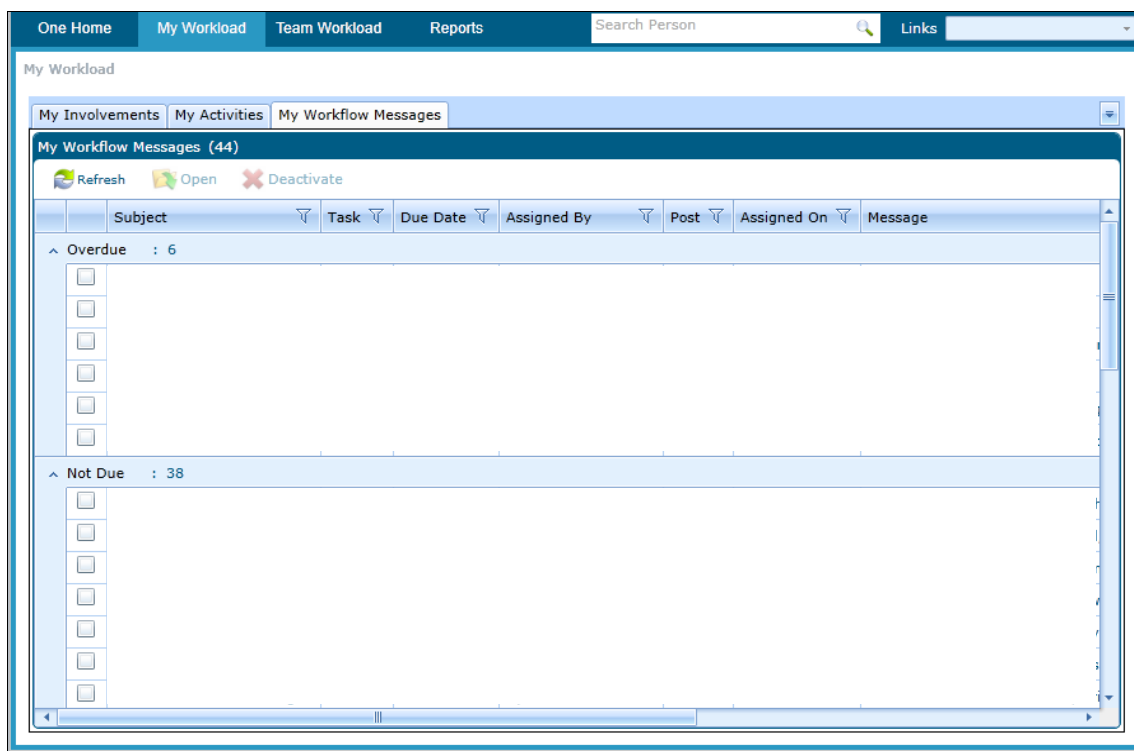- **Logout** – click this hyperlink to log out of CSS Online

My Workload Page

In **One** 3.46 the CSS Home Page has been renamed to **My Workload**. You can now access this page from anywhere in CSS Online by clicking the 'My Workload' option in the primary navigation bar. The panels that previously displayed on this page have been changed to the following tabs:

- **My Involvements**
  This tab displays a list of the logged on user's involvements. These are the details previously shown in the My Involvements panel of the CSS Home page. This is the tab that will initially display when you access the My Workload page (either by logging into CSS Online or when you click 'My Workload' in the primary navigation bar).

- **My Activities**
  This tab displays a summary of the activities the logged on user is involved with. These are the details previously shown in the My Activities panel of the CSS Home page.

- **My Workflow Messages**
  This is a new tab for **One** 3.46. This tab displays a list of the Workflow Messages assigned to the logged on user. Further details about this tab are provided below.

My Workflow Messages Tab

The My Workflow Messages tab is available in the My Workload page in CSS Online. It consists of a grid that shows a list of the active Workflow Messages that are assigned to either the logged on user or to the Post of the logged on user. The screen shot below provides an example of this tab.

Workflow Messages are grouped in the grid in the following sections:

- **Due Today** – shows those messages where the Due Date is today's date.

- **Not Due** – shows those messages where the Warning Date is before or the same as today's date and the Target Date is after today's date.

- **Overdue** – shows those messages where the Due Date is before today's date.

- **Actioned** - shows those messages where the activity generating the message has been actioned.

- **Default** - shows those messages that do not have a due date.

You can also sort the Workflow Messages using the standard CSS Online filters that appear at the top of each column in the grid.

The Workflow Messages tab shows the following details:

- **Subject** – the subject of the Workflow Message

- **Task** – indicates whether the message is a task

- **Due Date** – the due date of the message. If the due date for a message is the same as the system date then the text 'Today' will display in this column

- **Assigned By** – the name of the person who assigned the Workflow Message to the user

- **Post** – indicates whether the Workflow Message is assigned to a specific user or to a post

- **Assigned On** – the date the message was assigned to the user

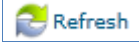- **Message** – the text of the message. You can view the full message text in the Message Details window (further details about the Message Details window are provided below).

The following buttons and icons display in the Workflow Messages tab:

- **Refresh** button – clicking this button refreshes the Workflow Messages grid to show an up to date list of active messages

- **Open** button – this button is only enabled when you select a Workflow Message in the grid. Once you have selected a Workflow Message, clicking this button allows you to open the Message Details window to view the full details of that message. You can also double click on a message in the grid to open the Message Details window. More details about the Message Details window are provided below.
  Note: Any ACLs that have been set up only apply to the associated involvement record. They do not apply to the Workflow Messages that display in Workflow Messages panel.

- **Deactivate** button – this button allows you to deactivate Workflow Messages. It is only enabled when you select Workflow Messages by ticking the box in the grid next to the relevant message. You can select one or more messages at a time. Clicking this button then sets the selected messages to 'deactivated' and removes them from the grid. This does not delete these Workflow Messages from the database.

- **Show Involvement Details** icon - If a Workflow Message is associated with a CSS Generic Involvement, it will display with a 'Show Involvement Details' icon next to the relevant message in the grid. Clicking this icon navigates you to the associated involvement record.

Message Details Window

The Message Details window allows you to view the full details of a selected Workflow Message. You can open the Message Details window from the My Workflow Messages tab or the Team Workload tab by carrying out one of the following:

- Double click on a message

- Highlight a message in the grid then click the '**Open**' button

An example of the Message Details popup window is shown below:
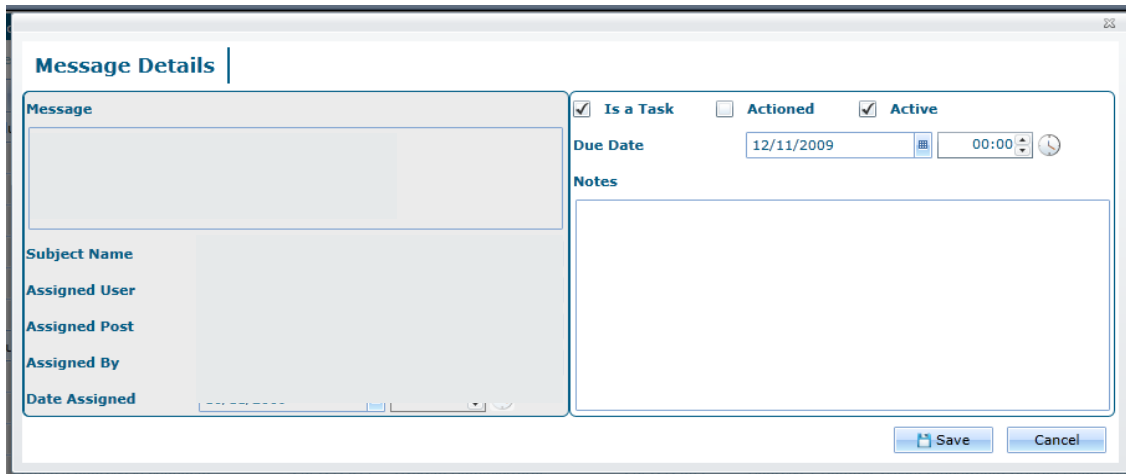
In the Message Details window, the following fields can be edited:

- **Is a Task** – indicates whether this message is a task.

- **Actioned** – indicates whether this message has been actioned.

- **Active** - if you untick this box then save the Message Details window, this will deactivate the message. In this case, when you return to either the My Workload page or the Team Workload page, the associated message will no longer display in the Workflow Messages grid. This does not delete these Workflow Messages from the database.

- **Due Date** – this consists of a date field and a time field.

- **Notes** – this allows you to record further notes about the message.

All other fields in the Message Details window are **read-only**.

Team Workload Page

A new **Team Workload** page has been introduced in **One** 3.46. This page allows you to view a Summary of the Involvements, Activities and Workflow Messages for a Service Team or a specific member of that Service Team. You can access this page from anywhere in CSS Online by clicking the 'Team Workload' option in the primary navigation bar.

When you initially access the Team Workload page the tabs will display blank. To view any details you must first use the **Service Team filter** that displays at the top of the page to select who you wish to display information for. The screen shot below provides an example of the Service Team filter:
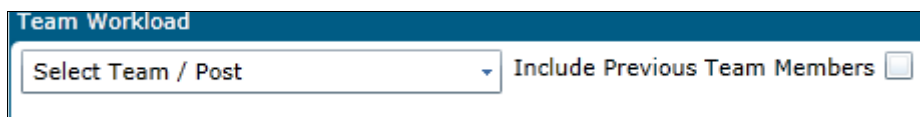
The dropdown shows in a tree structure, the Service Teams of which you are a member. Under each Service Team, all the Posts for that team display with the name of each person who belongs to that Post. Select either a Service Team or a Person, the system will then refresh the Team Workload page and display the associated details in the grid below the filter.

Within the Service Team dropdown you can use the **Expand** icon and the **Collapse** icon to show and hide the Service Teams and Posts within the tree.

If you tick the '**Include Previous Team Members**' checkbox, persons that previously belonged to a Post within your Service Teams will be included in the Service Team filter.

The Team Workload page consists of the following tabs:

- Involvements
- Activities
- Workflow Messages

Involvements Tab

The Involvements tab displays a list of the selected team's or team member's Involvements. This is the tab that initially displays when you access the Team Workload page (for example, when you click on the 'Team Workload' option in the primary navigation bar).

Setup for Involvements Tab

The following system settings affect how the Involvements tab displays records. They have default settings but your authority can configure these as required:

- **QBE Threshold**
  This threshold affects the number of records that are shown in the Involvements tab. Your System Administrator can set the value for the QBE Threshold by changing this setting in the **Config Utility**. The QBE threshold is a global setting and the value that is set affects all areas of the system. For example, the QBE threshold also affects the number of records returned when a Person Search is carried out. When you access the Involvements tab, the system checks the QBE threshold and if the number of records to be displayed in this tab is greater than the value in this threshold, the system will show a warning message. This message advises you that there are more records than can be displayed. You should then use the **Involvement** and **Date Range** filters that display above the grid to reduce the number of records you wish to view (see below for more details about these filters).

- **LA Default 'INV_FILTER** ' (LA Default 'From day filter in Involvement')
  The 'INV_FILTER' is a new LA Default that is used to calculate the default date range of the Involvements displayed in the Involvements tab. The value in this parameter is a number of days. It is recommended that this filter be used to reduce the number of Involvements returned by users, for example, the last 10 days. Your System Administrator can set this value in the LA Defaults tab of the System Administration module in v3. This tab is shown in the screen shot below:
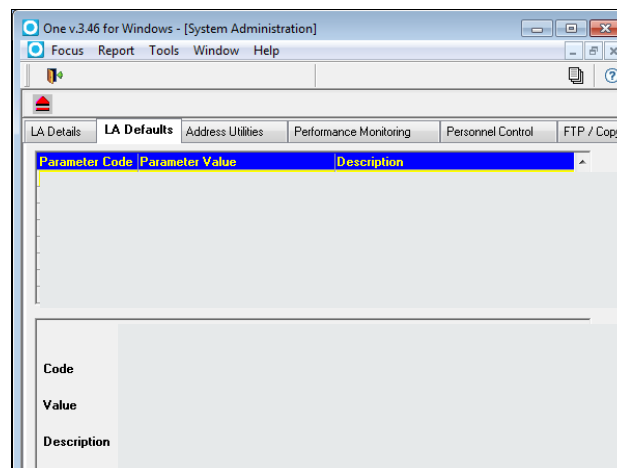
When you initially access the Involvements tab, the system automatically populates the **Date Range** filter. The '**From**' date field is populated with a date which is today's date minus the number of days in the 'INV_FILTER' LA Default. The '**To**' date field is populated with today's date. This is the date range that the system then initially uses to show the Involvements for the Service Team or Person you have selected in the Service Team filter at the top of the page.

Using the Involvements Tab

When you initially access the Involvements tab the grid will display blank. The 'From' and 'To' date fields will automatically be populated with the default date range (based on the 'INV_FILTER' LA_Default – for further details see above). To view a list of Involvements you should select either a Service Team or Person from the Service Team filter at the top of the page. The system will then refresh the tab and display the Involvements for the team or person you have selected that have a start date within the default date range.

The Involvements tab contains the same columns as is shown in the My Involvements tab of the My Workload page. In addition, this tab also shows a '**Service Team**' column and a '**Caseworkers**' column. The screen shot below provides an example of the Involvements tab:
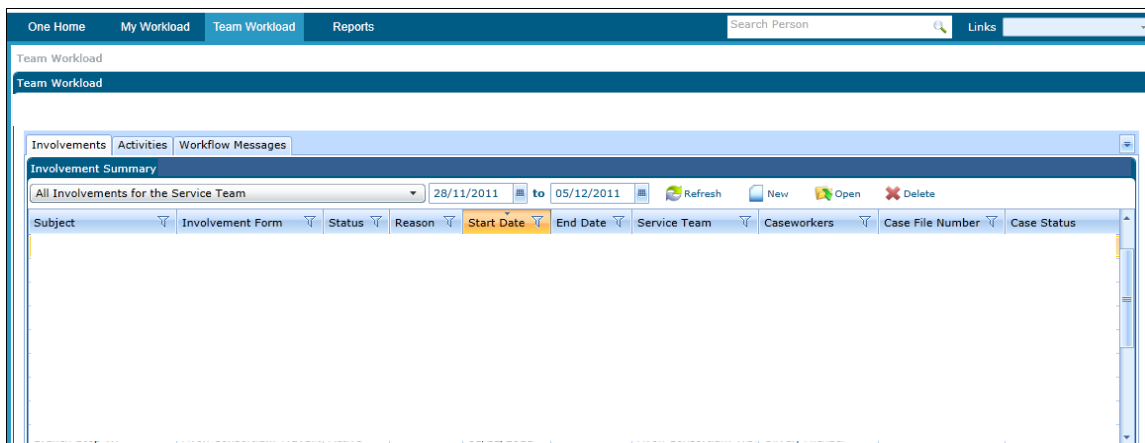
The following filters and buttons display in the **Involvements** tab:

-

  Involvements filter – this dropdown list allows you to filter the involvements that are displayed for a Service Team. This filter is disabled if you select a person from the Service Team filter at the top of the Team Workload page. You can use this filter to show the following for the Service Team you have selected:

  - All Involvements for the selected Service Team (this is the default option)
  - Only Involvements without a specific Caseworker assigned
  - Only Involvements without a specific Admin Worker assigned

-

  Date Range filter – this filter consists of two date fields which you can use to enter a '**From**' and '**To**' date. This allows you to filter the Involvements to display only thos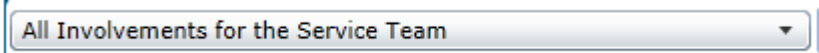e records where the start date is within a specific date range. When you initially access the Involvements tab these fields will be populated with the default date range. In this case, the 'From' date field will be set to today's date minus the number of days in the 'INV_FILTER' LA Default (see above for more details) and the 'To' date field will be set to today's date. To use this filter, enter dates in the 'From' and 'To' date fields then click the '**Refresh**' button. The 'From' date cannot be after the 'To' date. If you enter a 'To' date, you must enter a 'From' date.

-

  Refresh button – clicking this button refreshes the Involvements grid to show the Involvements appropriate to the selected filters.

-

  New button – this button allows you to create a new **CSS Generic Involvement**.

-

  Open button – this button allows you to open an Involvement. It is only enabled when you select an Involvement in the grid that is a CSS Generic Involvement. Once you have selected an Involvement of this type, clicking this button navigates you to the Involvement Details page for that record. You can also double click on the Involvement in the Involvements grid to navigate to the Involvement Details page.

-

  Delete button – this button allows you to delete an Involvement. It is only enabled when you select an Involvement in the grid that is a CSS Generic involvement. Once you have selected an Involvement of this type, on clicking this button a '**Delete selected Involvement**?' confirmation message displays. Clicking 'Yes' on this message deletes the selected Involvement and removes it from the grid.

Activities Tab

The Activities tab displays a list of the Activities for a selected Team or member of a Service Team. The Activities tab will initially display blank. To view a list of Activities you must select a Service Team or Person from the Service Team filter at the top of the page. The system will then refresh the tab and display the relevant Activities. If you have selected a Person rather than a Service Team, Activities are listed for all Service Teams to which they belong.

By default, only Activities that are current or in the future will display. A current Activity is one where the end date is on or after today's date. You can use the Date Range filter above the grid to either restrict the records further or include past Activities (see below for further details about the Date Range filter).

The Activities tab contains the same columns as is shown in the My Activities tab of the My Workload page. The screen shot below provides an example of the Activities tab:
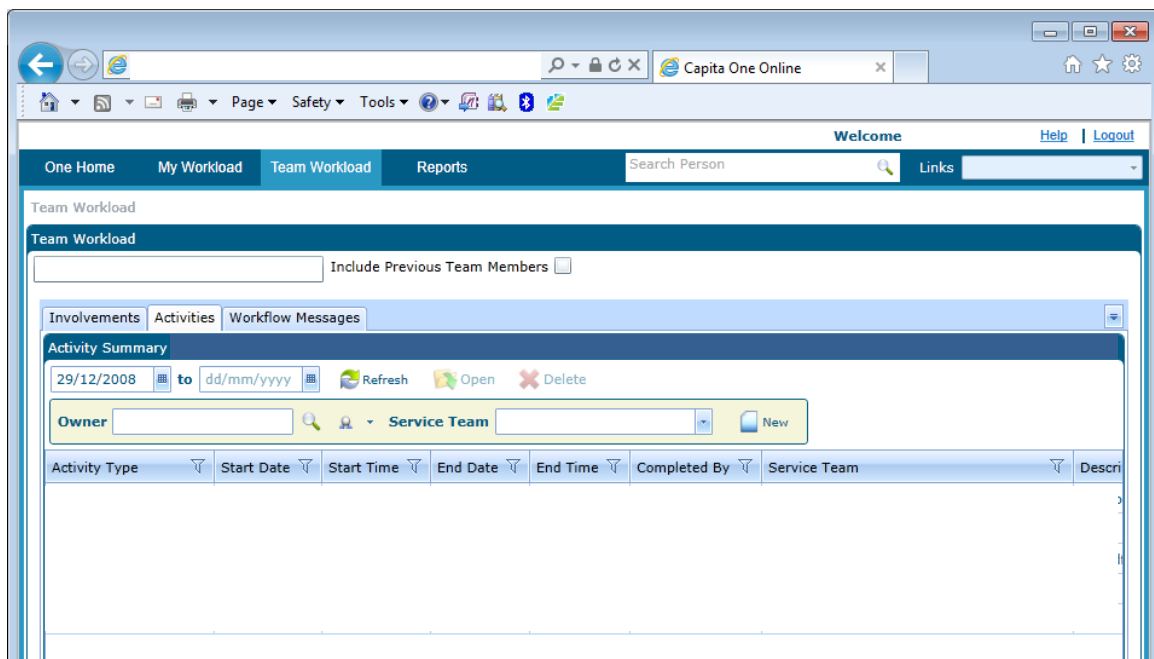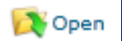

The following filters and buttons display in the Activities tab:
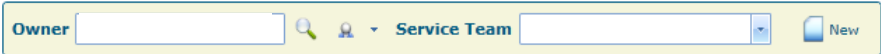
-

  Date Range filter – this filter consists of two date fields which you can use to enter a 'From' and 'To' date. This allows you to filter the Activities to display only those records where the start date is within a specific date range. When you initially access the Activities tab the 'From' date field is populated with today's date. To use this filter, enter dates in the 'From' and 'To' date fields then click the 'Refresh' button.

-

  Refresh button – clicking this button refreshes the Activities grid to show the Activities appropriate to the selected filters.

-

  Open button – this button allows you to open an Activity. It is only enabled when you select an Activity in the grid. Once you have selected an Activity, clicking this button navigates you to the Activity Details page for that record. You can also double click on the Activity in the grid to navigate to the Activity Details page.

-

  Delete button – this button allows you to delete an Activity. It is only enabled when you select an activity in the grid. Once you have selected an Activity, on clicking this button a '**Delete selected Activity**?' confirmation message displays. Clicking 'Yes' on this message deletes the selected Activity and removes it from the grid. If you select a main Activity for a set of Recurring Activities, then the 'Delete' button is disabled. If select an Activity that is a Linked Activity, when you click the 'Delete' button, a warning message will display. This message will advise you that you are attempting to delete a Linked Activity and will ask you to confirm this deletion.

-

  New Activity fields – this set of fields allows you to create a New Activity. It consists of an '**Owner**' field (this field defaults to the name of the logged on user), a '**Service Team**' field and a '**New**' button. This set of fields work in the same way as the New Activity fields in the My Activities tab of the My Workload page. To create a new Activity, enter an Owner and a Service Team then click the 'New' button'.

Workflow Messages Tab

The Workflow Messages tab consists of a grid that shows a list of the active Workflow Messages that are assigned to either the selected team or team member. The Workflow Messages tab will initially display blank. To view a list of Workflow Messages you must select a service team or person from the Service Team filter at the top of the page. The system will then refresh the tab and display the relevant messages. The screen shot below provides an example of this tab.

Workflow Messages are grouped in the grid in the following sections:

- **Due Today** – shows those messages where the Due Date is today's date.

- **Not Due** – shows those messages where the Warning Date is before or the same as today's date and the Target Date is after today's date.

- **Overdue** – shows those messages where the Due Date is before today's date.

- **Actioned** - shows those messages where the activity generating the message has been actioned.

- **Default** - shows those messages that do not have a due date.

You can also sort the Workflow Messages using the standard CSS Online filters that appear at the top of each column in the grid.

The Workflow Messages tab shows the following details:

- **Subject** – the subject of the Workflow Message

- **Task** – indicates whether the message is a task

- **Due Date** – the due date of the message. If the due date for a message is the same as the system date then the text 'Today' will display in this column

- **Assigned To** – the name of the person who the Workflow Message is assigned to

- **Assigned By** – the name of the user who assigned the Workflow Message to the person

- **Assigned On** – the date the message was assigned to the user

- **Message** – the text of the message. You can view the full message text in the Message Details window. For further details about opening the Message Details window see below.

The following buttons and icons display in the **Workflow Messages** tab:

-
  Refresh button – clicking this button refreshes the Workflow Messages grid to show an up to date list of active messages based on the selected Service Team filter.

-
  Open button – this button is only enabled when you select a Workflow Message in the grid. Once you have selected a Workflow Message, clicking this button allows you to open the Message Details window to view the full details of that message. You can also double click on a message in the grid to open the Message Details window. For further details about the Message Details window see the **My Workload Page** section of these Product Notes.
  Note: Any ACLs that have been set up only apply to the associated Involvement record. They do not apply to the Workflow Messages that display in Workflow Messages panel.

-

  Deactivate button – this button allows you to deactivate Workflow Messages. It is only enabled when you select Workflow Messages by ticking the box in the grid next to the relevant message. You can select one or more messages at a time. Clicking this button then sets the selected messages to 'deactivated' and removes them from the grid. This does not delete these Workflow Messages from the database.

-

  Show Involvement Details icon - If a Workflow Message is associated with a CSS Generic Involvement, it will display with a 'Show Involvement Details' icon next to the relevant message in the grid. Clicking this icon navigates you to the associated Involvement record.

SEN (v3)

SEN2 2012 Return

Introduction

The **SEN2** return is produced by Local Authorities in England at the beginning of each calendar year and is sent to the Department for Education (DfE) for further country-wide data analysis. It is required by the Education Act 1996 and provides information on the students within the Local Authority who have been assessed and/or have statements of Special Educational Needs (SEN). Students are only included if they are the responsibility of the Local Authority producing the return.

The Census date for the production of the latest return is **19th January 2012**.

DfE changes for 2012

The DfE have introduced a new school type of 'Special Academies' and want this information collected via the annual SEN2 survey form which provides the major source of data collected on children with Statements of Special Education Needs. The Special Academies School Type will have its own Student count in a number of areas and will be included in any related subtotal counts for the SEN2 Return for 2012.

Note: Special Academies are previously Maintained or Non-Maintained Special Schools which converted to an Academy.

School Type Lookup values

The SEN2 Return picks ups the School Type values from the lookup *Table ID **0128*** and the Table Description **SEN School Type.**

A new code and description with the following information has been added to **One v3|SEN|Tools|Module Administration|User Code**
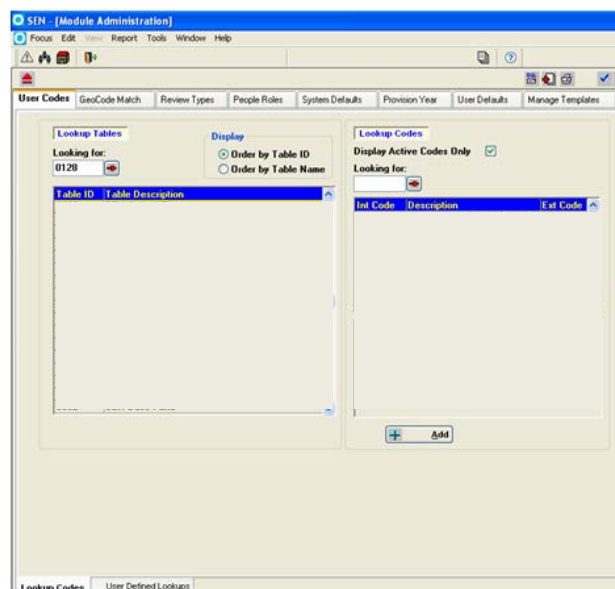
- The Int Code is **SAC** (**Note:** This can be changed by the users if they wish to use another Internal Code. This code will need to be a maximum of 3 characters in length)

- The Description is **Special Academies**

- The **Active** checkbox will be checked

- The Ext Code will be **E_SAC**

Reporting on Special Academies

The Questions in **One** are a true reflection of the questions that are found in the SEN2 Survey

Question 1.2.1.l
A new row will appear for **Special Academies**. This will be displayed under the Academies row (highlighted). This will display the count for the Students in question **1.2.1.l.**

One v3 | SEN | Report | External Return
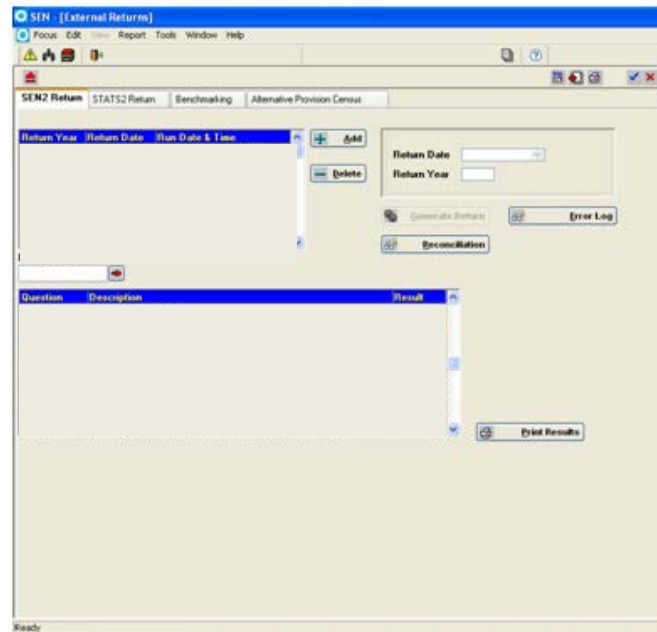
This is the information that will be displayed in the new row;

- **Question:** This will appear as 1.2.1.l

- **Description:** This will be Special Academies

- **Result:** This will display the result count for the Students within that category

Question 1.2.2
Question 1.2.2 will give a total count of all the results returned from all the questions in section 1.2.1. This is the total of the counts in questions **1.2.1.a – 1.2.1.l** above

Note: The results returned in these questions should also appear in the Reconciliation Reports when run.

Question 2.2.1.l
A new row will appear for **Special Academies**. This will be displayed under the Academies row (highlighted). This will display the count for the Students in question **2.2.1.l.**

One v3 | SEN | Report | External Return

This is the information that will be displayed in the new row;

- **Question:** This will appear as 2.2.1.l

- **Description:** This will be Special Academies

- **Result:** This will display the result count for the Students within that category
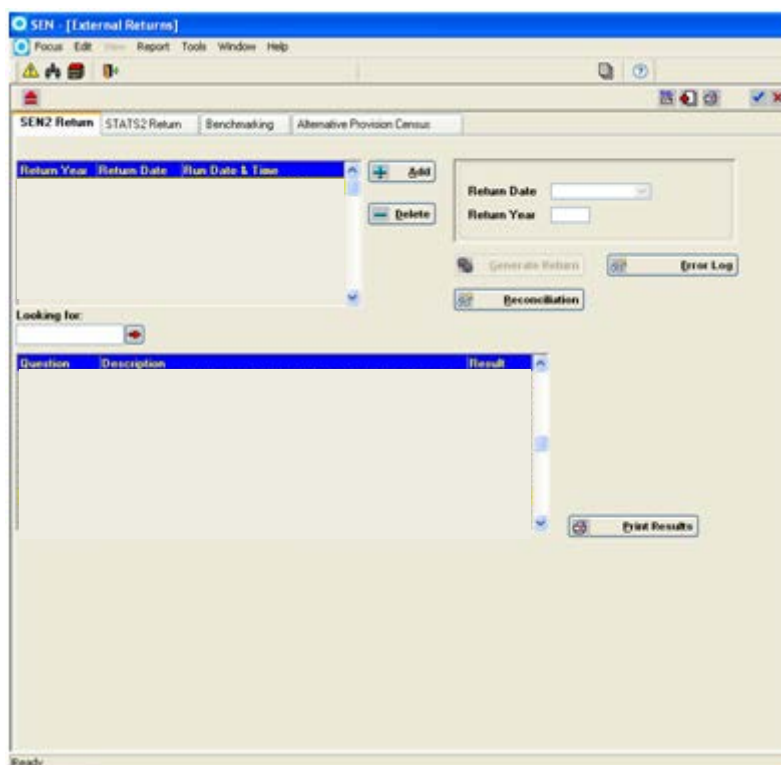
Question 2.2.2
Question 2.2.2 will give a total count of all the results returned from all the questions in section 2.2.1. This is the total of the counts in questions **2.2.1.a – 2.2.1.l** above

Note: The results returned in these questions should also appear in the Reconciliation Reports when run

Error Log for Questions
This is already present in **One** and a minor amendment is made.

The Error Log lists all the records found with errors for all the questions. This will now also include the Special Academies questions;

- 1.2.1.l
- 1.2.2
- 2.2.1.l
- 2.2.2

Business Rules and Exception Messages
The Business Rules and Exception Messages have been updated as part of the SEN2 2012 Return to include the Special Academies School Type. Please refer to the '**v3 SEN2 2012 – Business Rules and Exception Messages**.pdf' which can be found in the **Users** folder on the **DVD**.

CSS/SEN 3.44

CSS (v4 client)

Search and View Provision by Base – New Functionality

Currently Provision Allocation is created against the student to which that Provision is being provided and can be viewed in the links against that student. New functionality will now allow the ability to record Provision Allocation against a Base. The Provision Allocation Details page is a series of panels in which to enter information relevant to the Provision being provided. These panels are headed by the **Provision Details** panel which contains the **Service Team** name.

Navigating via Focus | Bases | Bases (select a Base) will now show 'Provision' in the links panel:
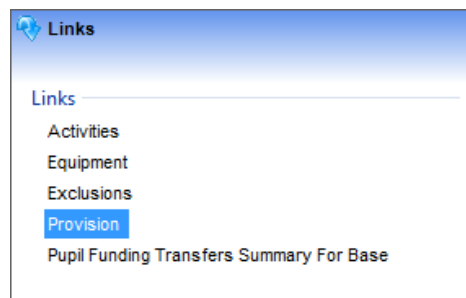
Selecting this link will display the Provision Summary page for all provision allocated against the Base. This may be records which have had Provision allocated against the Base directly as well as Provision allocated against a student with this Base being defined.
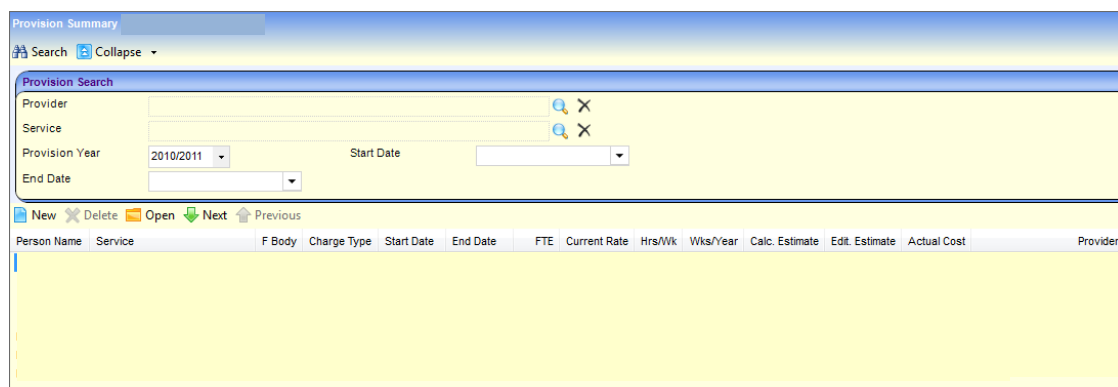
Within the Provision summary, Provision recorded against a Person will show their name in the first column, Provision recorded against the Base will show this column as blank.

By default, the order of these records will be sorted on Provision start date with the latest first. However these records can be sorted on any of the other criteria by clicking on that column header.

Equipment Changes

Always have to select Service Team when searching even if only in one Service Team

When searching for Equipment on the Inventory, currently the user has to search and pick a Service Team, even if they are a member of only one Service Team.

This has now been changed so that if the user is a member of only one Service Team, the Service Team will be defaulted into the Service Team data field.

The option to select an alternative Service Team will remain if the user belongs to more than one Service Team.

Areas where this has been implemented:

Focus | Equipment Inventory | Equipment Inventory Search
Focus | People | Student | Equipment | New | Equipment Inventory Search
Focus | People | Person | Equipment | New | Equipment Inventory Search
Focus | People | Student/Person | Equipment | Equipment Loan Enquiry - Service Team data field.

Description column missing from Summary

A 'Description' column has now been added to the Equipment Inventory summary screen. This will allow users to distinguish items which, for example, are of the same Make or where the Model is blank.

A Description column has been added to the Equipment Inventory summary screen in the following places:

Focus | Equipment Inventory | select a service team | search | Equipment Inventory search result screen (summary).
Focus | People | Student | Equipment | New | select a Service Team | search | Equipment Inventory search result screen (summary)
Focus | People | Person | Equipment | New | select a Service Team | search | Equipment Inventory search result screen (summary)

Summary Screen not displayed if only one item of Equipment for Equipment Type

If only one item of Equipment belongs to an Equipment Family (Type) then the system previously took the user straight into the Equipment Details screen. This caused problems when the user tried to loan that Equipment item to a Student/Person, as the user had to close the Equipment Details screen, for the item to then be shown in the summary. It is only from here that the user can select the item to loan.

This has now been changed so that the summary screen is displayed regardless of how many items are in the Equipment Family.

Affected areas: v4 Focus | People | Student | Equipment
                              Focus | People | Person | Equipment
                              Focus | Equipment Inventory.

Equipment Items sorted in Random Order

The sorting order of the Equipment Items list appeared to be random and so a 'Creation date' (auto-populated) has now been added as the third column in Equipment Items which now acts as the default sort criteria. Clicking on the Creation Date column header will allow the order to be sorted in ascending or descending order.

Creation Date Column has been added to the following areas:

Focus | Equipment Inventory | Equipment Details | Equipment Items summary
Focus | People | Student | Equipment | New | Select Service Team and search | Equipment Items Summary
Focus | People | Person | Equipment | New | Select Service Team and search | Equipment Items Summary

Always have to input Service Team when adding Equipment Item

Previously, when adding a new Equipment Item, the user was required to search and select a Service Team, even if they were a member of only one Service Team. Therefore this has changed, so that if a user is a member of only one Service Team, when adding a new Equipment Item, the Equipment Item Details panel will default to that Service Team. If the User is a member of more than one Service Team, they will still be able to select the Service Team from the Service Team chooser.

Area Affected: Focus | Equipment Inventory | New | Equipment Items

Warn if Serial Number already exists when Adding or Editing Equipment Item

The system previously allowed duplicate Manufacturer Serial Numbers to be entered, when adding, cloning and editing Equipment Items. This has been changed so that when a duplicate Manufacturer Serial Number is entered into an Equipment Item (either when adding, cloning or editing) and the user selects save, the following warning is now displayed: 'Manufacturer Serial No. already exists, do you wish to continue?' with the options 'Yes' and 'No'. 'Yes' will save the Equipment Item. 'No' will cancel the save and return to the Equipment Items screen.

Can Create Overlapping Loans

Previously, when creating Equipment loans in v4, the system did not check the End Date when checking for overlapping Loans. For example, if an Equipment Item was on loan between 01/03/2009 and 03/03/2009. The system would allow the user to put in a Loan of the same Equipment Item from 23/02/09 - 03/03/2009. This was due to the fact that the Start Date did not fall within any previous loan period (even though the End Date did). This has now been changed so that the same Item of Equipment can only be loaned out once for a set period. This has also been remedied within CSS Online.