



# Deploying and Configuring the One Citizen Self Service Portal for Local Authorities

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Technical Guide

**CAPITA**

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# 01 / Introduction and Prerequisites

## Overview

This document describes how to deploy and configure the One Citizen Self Service portal platform. The platform provides an architecture upon which individual modules can be deployed. The One Citizen Self Service portal is hosted in the One web-tier and therefore the server components are installed by the One Technical Services team. However, there are configuration steps that must be carried out on the mid-tier components as well. For Local Authorities that manage their own mid-tier infrastructure, these mid-tier configuration steps must be carried out by the local IT department. Finally, there are configuration steps that must be completed by a One Administrator via the One v3 and v4 Clients.

## Using this Handbook

This handbook is intended to be used by System Administrators to install and configure the server components and by One Administrators to configure areas within the One v3 and v4 Client software to enable the One Citizen Self Service portal to operate.

This handbook does not cover how to use the Citizen Self Service portal. For more information, see the *Using the One Citizen Self Service Portal* handbook, available from the One Publications website ([www.onepublications.com](http://www.onepublications.com)).

## Prerequisites

- Liaise with the One Technical Services team who will install and set up the web server components.
- Ensure the most recent version of the One email service is installed. For more information on installing the service, refer to the *Installing the Email Service* chapter in the *Installing and Configuring One v4 Core Components* technical guide, available from the One Publication website ([www.onepublications.com](http://www.onepublications.com)).
- Ensure the One v4 SMTP server is configured and operational. The self-service portals rely on email to operate. For more information, see [Configuring the Email Settings](#) task on page 4.
- A Citizen Self Service Portal licence.

## Citizen Self Service Basic Installation and Configuration Checklist

Step	Where to do it	What to do	Completed
1	<b>One Configuration Utility</b>	Set the portal URL using the CCS Server Configuration Utility.	<input type="checkbox"/>
2	<b>One Configuration Utility</b>	Configure the Integration Service using the CCS Server Configuration Utility.	<input type="checkbox"/>
3	<b>One Configuration Utility</b>	If you use the SEND portal, configure the application server to use the generic file upload service using the CCS Server Configuration Utility.	<input type="checkbox"/>
4	<b>v3 Client</b>	Configure Citizen Portal login security policy.	<input type="checkbox"/>
5	<b>v4 Client</b>	Assign Citizen Portal Administrator and Portal Back Office User permissions.	<input type="checkbox"/>
6	<b>v4 Client</b>	Create the required UDFs	<input type="checkbox"/>
7	<b>v4 Client or v4 Online</b>	Create dummy bases for applications submitted via the portal.	<input type="checkbox"/>
8	<b>v4 Client</b>	Set up the scheduled task.	<input type="checkbox"/>
9	<b>v4 Online</b>	Log in as Citizen Portal Administrator, authenticate their email and check you can access the <b>Administration</b> menu.	<input type="checkbox"/>
10	<b>Citizen Portal Admin</b>	Configure the site settings via <b>v4 Online   Citizen Portal Admin   Administration   General Administration   Portal Configuration   Site Settings</b> .	<input type="checkbox"/>



# 02 / Installing and Configuring the Server Components

## Introduction

This chapter describes how to configure the server components on the One mid-tier to enable the One Citizen Self Service portal. The installation of the server components is performed by the One Technical Services team. For Local Authorities that manage their own mid-tier, a System Administrator should complete the following tasks on their mid-tier.

## Installing the Server components

The server components for the Citizen Self Service portal are installed on the web server by the One Technical Services team. An existing One infrastructure is required, including an application server and session server. You must raise a web service request via My Account to arrange for the Technical Services team to deploy the Citizen Self Service Portal components onto your One web server. A minimum of three days' notice is required to schedule the installation of the software on the web server.

In order for One Technical Services to complete the web server installation, they require the following information:

- The Username and password of a One administrator account. For Local Authorities already using AnT Online Public facing, you can use the same account for the One Self Service portals.

**IMPORTANT NOTE:** From the One Spring 2017 Release, the One administrator account you supply to the Technical Services team must be a member of a user group which has Read access to the Common Portal Account main business process. For more information on assigning users to groups and assigning permissions, refer to the One System - Users, Groups, Permissions handbook, available from the One Publications website ([www.onepublications.com](http://www.onepublications.com))

- The One Portals API URL for your environment. The URL is case sensitive and must be supplied to the Technical Services team exactly as it appears within IIS on the mid-tier server on which it is installed.

### More Information:

Installing the One Portals API technical guide available from the One Publications website ([www.onepublications.com](http://www.onepublications.com))

Upgrading the One Portals API 3.65 technical guide available from the One Publications website ([www.onepublications.com.com](http://www.onepublications.com.com))

- A logo in .gif, .jpg or .png format. This is displayed on the portal pages and should be sized to the desired dimensions before sending it to Technical Services. The portal server does not resize the logo graphics so logos are displayed at full size. If you already use Admissions Online, you can also ask to use the same logo.

Once this information has been provided and the web server installation and setup process has been completed by the One Technical Services team, a URL to access the portals is provided to you.

For Local Authorities that have not already configured their One SMTP servers, complete the [Configuring the Email Settings](#) task on page 4.

If your email servers are already configured, skip to the [Configuring the Application Server for the Citizen Self Service Portal](#) topic on page 4.

## Configuring the Email Settings

In order to send email to Citizen portal users, the One SMTP server must be configured. For Local Authorities currently using AnT v4 Online, this should already be configured. For customers that do not already send emails via One, you must complete the following procedure.

**WARNINGS:** *The settings in this area affect all areas of One, including AnT v4 Online.*

*From the One Autumn 2015 Release (3.58), you must have the latest One Email Services installed. For more information on installing the One Email Service, refer to the Installing the Email Service chapter in the Installing and Configuring One v4 Core Components technical guide, available from the One Publication website ([www.onepublications.com](http://www.onepublications.com)).*

*Before configuring the v4 email system, please check Appendix A: Checking the email Queue in the Deploying and Setting Up CCS V4 Online AnT for Local Authorities technical guide for instructions on how to check there are no emails pending in the database. If there are unsent emails remaining in the database, and the v4 SMTP server is configured to work, these emails will be sent.*

1. On the Application server, run the CCSServerConfig.exe from the C:\inetpub\wwwroot\CCSEnterpriseApplicationService\_LIVE\Config folder.
2. Select the **Application Server** tab, and select the required Application Server from the drop-down.
3. Navigate to the **Email Settings** section.
4. Enter your **SMTP Server** and **SMTP Port No.**
5. If required, enter the **SMTP User** and **SMTP Password**.
6. If required, enter a **From Address for Email**, this will be the address from which the email is sent.

**NOTE:** *This address is used for all One related email, so should be generic, such as [enquiries@localauthority.co.uk](mailto:enquiries@localauthority.co.uk) and not portal specific.*

7. Click the **Save** button.

Additional configuration is required for Citizen Self Service Portal users. Continue to the [Configuring the Application Server for the Citizen Self Service Portal](#) topic on page 4.

## Configuring the Application Server for the Citizen Self Service Portal

After the One Technical Services team have completed their installation of the portal software, they will provide Local Authorities with the details, including the URL, of the portal. Once you have this information, you can configure your application server. To ensure that email messages can be sent to portal users, email settings on the application server may need to be configured as well (customers using AnT Online probably have this configured already).

## Setting the Citizen Portal URL and File Upload Service values

**WARNING!** *Saving changes in the CCS Config Utility forces the application pool to recycle, which forces anyone using the v4 Client or v4 Online to log in again and potentially lose unsaved data. Therefore, you should only make changes via the CCS Config utility during a period of downtime, especially if updating your LIVE system.*

In order to link the **Citizen Portal Admin** lozenge in One v4 Online to the correct Citizen Portal implementation, the URL of the Citizen Portal must be provided as part of the Application Server configuration. You must also enter settings for the file upload service:

1. On the Application server, run the CCSServerConfig.exe from the C:\inetpub\wwwroot\CCSEnterpriseApplicationService\_LIVE\Config folder.
2. Select the **Application Server** tab, and select the required application server from the drop-down.
3. Navigate to the **Citizen Portal Settings** section.
4. Enter your Citizen Portal site URL supplied to you by the One Technical Services team into the **Citizen Portal Home** field.
5. Navigate to the **File upload service settings** panel.
6. Click the **Suggest Defaults For Empty Items** button to automatically populate some of the fields.

**IMPORTANT NOTE:** The **Suggest Defaults For Empty Items** button will populate the **SSOAuthentication URL** field. If your One environment does not use SSO (required for Transport v4), then you should delete the suggested value for the **SSOAuthentication URL** field.

7. In the **Known Upload Clients** field, enter the IP address of your One web server. If your environment has multiple web servers, separate the values with a comma.
8. Edit any other values as required. For a full list of fields and their default values, see [File upload service related Application Server tab field descriptions](#) on page 5.
9. Click the **Save** button.

## File upload service related Application Server tab field descriptions

The following table summarises the file upload service settings that must be configured via the **Application Server** tab of the CCS Enterprise Configuration Utility.

18. File upload service settings	
Known upload clients	10.128.39.145,10.128.19.131,::1,127.0.0.1
Session time frame per user in minutes	10
Maximum uploadable file size per session in bytes	104857600
Uploadable file types	svdVOVLer4QQjivNrtUrMZQCtITlW/API4Zb8fmbB5yWuWllgdsd5wRP8qoOjIT4NPbemmd+GAwjDOUEv3mNXzw==
Maximum uploadable file size in bytes	JSFGM+j73HCEGcyaf9R1W+ZQGLDyyuAme9QyQPMRIE=



Property	Value
<b>Uploadable file types</b> – An encrypted, comma separated list of supported file types. By default, the only valid file extensions are doc, docx, pdf, jpeg, jpg and bmp.	svdVOVLer4QOjvNrftUrMZQCiTlWAPi4Zb8fmbB5yWuWllgdsd5WRP8qoOjIT4NPbemmd+GAwjDOUEv3mNXzw==
<b>Known upload clients</b> - This is the list of IP addresses from which the service expect to receive upload requests. This list should only include the addresses of the web servers which host your portals. You can separate IP addresses with a comma.	127.0.0.1
<b>Maximum uploadable file size per session in bytes</b> - The maximum amount of data, in bytes, a user can upload within the time specified in the <b>Session time frame per user in minutes</b> field. With these default settings, a user cannot upload no more than 104857600 bytes in any 30 minute period. They can upload multiple files in this time window, but the total number of bytes for all the files cannot exceed this limit.	104857600 (Bytes)
<b>Session time frame per user in minutes</b> – The maximum length of time that a user has to complete a file upload. The user cannot upload more than the number of bytes defined in the <b>MaxPerUserUploadableSize</b> field during this timeframe.	30 (minutes)
<b>Maximum uploadable file size in bytes</b> – This is the maximum size of a single file upload. The default maximum is 10 MB and is encrypted.	JSFGM+j73HCEGcyafI9R1W+ZQGLDyyuAme9QyQPMRtE=

## Configuring the Integration Service

When applications that were created via the Citizen Self Service portal are updated elsewhere in One, notifications are sent to the portal user. In order to achieve this, some additional configuration is required within the integration service.

1. On the Application server, run the CCSServerConfig.exe from the C:\inetpub\wwwroot\CCSEnterpriseApplicationService\_LIVE\Config folder.
2. Select the **Integration Service** tab, and select the required **Integration Server Service**.
3. If required, enter the values for connection to the Oracle database.

4. Set the **Portal Update Interval**, which is the number of minutes between checks for updates to both FSM and Transport applications.
5. Click the **Save** button.

## Configuring Login Security

To enhance the security of the of public facing aspects of the One environment, e.g. AnT Online and the Citizen Self Service portal, a One Administrator can use the One System Administration v4 site to set options for preventing logins when too many unsuccessful logins have been attempted.

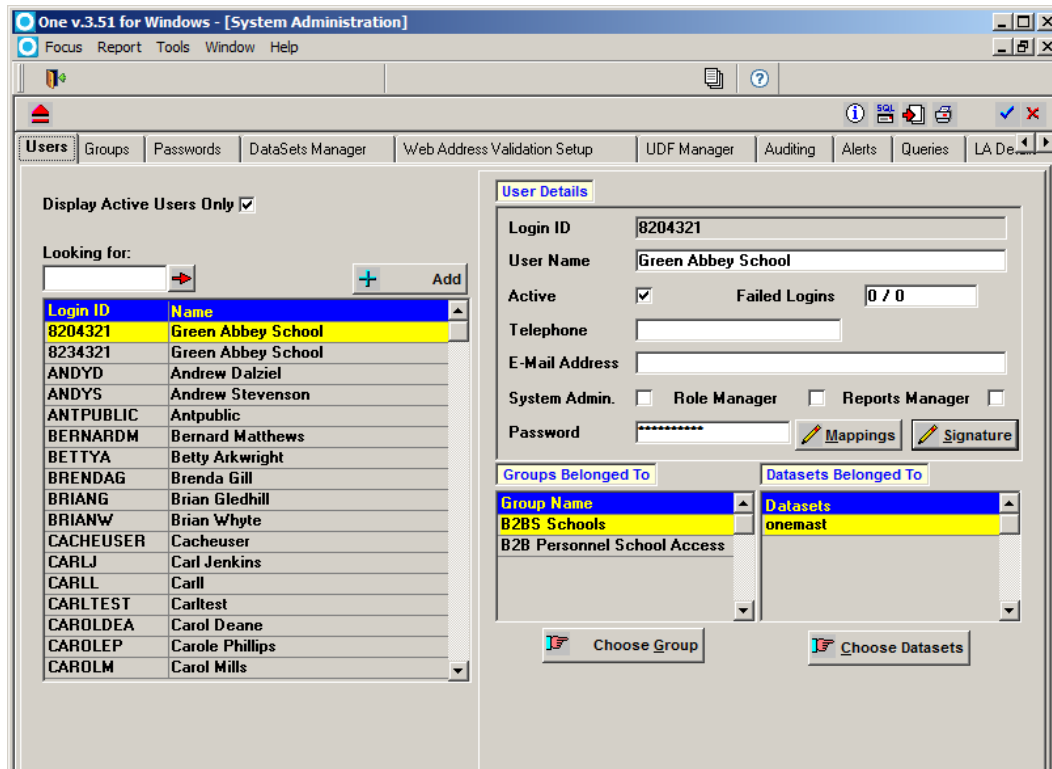
There are two types of lock that One will use to protect the integrity of the system. One will lock an account after a specified number of unsuccessful attempts (by supplying the wrong password). One can also block login attempts from a specific IP address after a certain number unsuccessful login attempts from that IP address, regardless of the user account used.

Login Types	Description
ANTPUBLIC	Used for AnT Online Public Facing, Citizen Self Service Portal and Professional Portal.

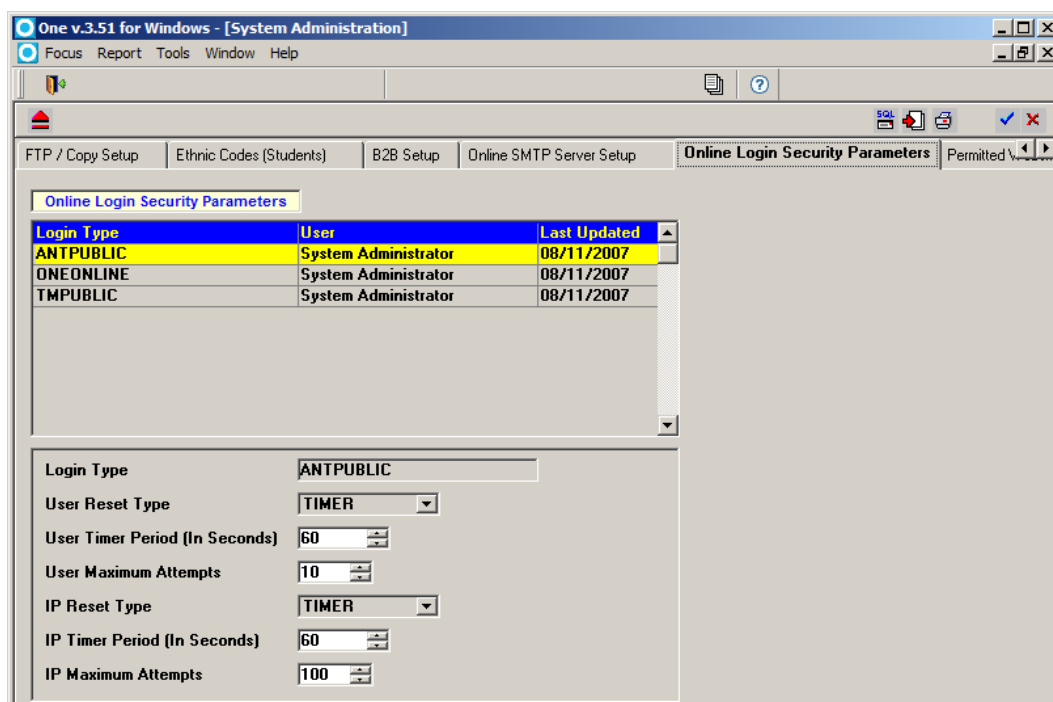
Login Types	Description
ONEONLINE	Used for One v3 Online.
TMPUBLIC	Used for Training Manager Public Facing.

To set the login security options:

1. Open the One v3 Client and select **Tools | System Administration** to display the system related tabs.



2. Click the right-scroll arrow in the tab menu to scroll the available tabs and select the **Online Login Security Parameters** tab.



3. Select the required **Login Type** from the list to display the options.
4. Select the required options for the user and IP.

Option	Description
Login Type	Name of the selected login.
User Reset Type	<p><b>MANUAL</b> – If selected, a One Administrator must manually reset the user account once it is locked out.</p> <p><b>TIMER</b> – If selected, the account will unlock automatically after the time specified in the <b>User Timer Period (In Seconds)</b> field.</p>
User timer Period (In Seconds)	The amount of time after which an account unlocks automatically and the user can attempt another login. After waiting the defined period, the user can make the same number of unsuccessful attempts again before they have to wait. The range is 3-99999.
User Maximum Attempts	<p>The maximum number of times a user can attempt to login before the account is locked out. The range is 1-999.</p> <p><b>NOTE:</b> There is a known issue, where the user can make one more login attempt than defined in the <b>User Maximum Attempts</b> value. For example, if the <b>User Maximum Attempts</b> value is 10, the user can make an 11<sup>th</sup> unsuccessful attempt before the account is locked.</p>
IP Reset Type	<b>TIMER</b> - The IP is unblocked automatically after the time specified in the <b>IP Timer Period (In Seconds)</b> field.

Option	Description
IP Timer Period (In Seconds)	The amount of time after which One will again accept a login attempt from the IP. After waiting the defined period, the same number of unsuccessful attempts can be made again before another timer period is enforced. The range is 3-99999.
IP Maximum Attempts	<p>The maximum number of times a user can attempt to login unsuccessfully before any more login attempts made from the IP are blocked. The range is 1-999.</p> <p><b>NOTE:</b> There is a known issue, where the user can make one more login attempt than defined in the <b>IP Maximum Attempts</b> value. For example, if the <b>IP Maximum Attempts</b> value is 10, the user can make an 11<sup>th</sup> unsuccessful attempt from the IP before the IP is blocked.</p>

5. Click the tick icon to save your changes.



# 03 / Configuring the v4 Client for Citizen Self Service Portals

## Introduction

This chapter describes how to configure areas within the One v4 Client to enable the proper function of the One Citizen Self Service portal. These tasks should be carried out a One Administrator.

The following tasks also need to be completed:

- Assign user groups that require access to the Citizen Self Service portal the required permissions. For more information, see [Setting User Permissions](#) on page 11.
- Create the Two Year Old Funding UDFs. For more information, [Creating the Two Year Old Funding UDFs](#) on page 12.
- Create dummy bases to enable application submission via the portal. For more information, see [Creating Dummy Bases for Applications](#) on page 12.
- Setting up a scheduled task. For more information, see [Setting up the Scheduled Task](#) on page 15.

## Setting User Permissions

### Administrator Permissions

The majority of the One Citizen Self Service portal configuration is done via the **Administration** area within the portal itself. In order for a One user group to have administrator access they must be granted `Read-Write-Delete` permissions for the Citizen Portal and Administrator business process, which are part of the Citizen Portal main business process. After these permissions are granted in the v4 Client, then the **Portal Administration** button is enabled on the Citizen Self Service portal.

### Portal Back Office Permissions

The Citizen Self Service portal is designed to collect applications from members of the public and incorporate those details into the One database for processing. To manage incoming applications via the Portal Back Office, a user group should have at least `Read-Write` permissions for the Portal Conflict Management and Portal LA Data Processing business processes. In order for a group to see the **Citizen Portal Admin** lozenge in v4 Online, they must have Read permissions for the Portal Conflict Management and Portal LA Data Processing business processes.

**IMPORTANT NOTE:** In order for One users to access the Citizen Portal, the One user must have an email address registered against their One account. If no email address is set, then the Portal Administration button will be disabled, regardless of the permissions set for the One user.

#### MORE INFORMATION:

`RG_Equipment` available from [My Account](#) and the One Publications website ([www.onepublications.com](http://www.onepublications.com)).

## Creating the Two Year Old Funding UDFs

Two Year Old Funding relies on a number of User Defined Fields (UDFs) to be created. The details of the UDFs created in the following sections must be entered into the One.

### Create a UDF for the application reference number

When an application for Two Year Old funding is created, a unique application reference number is created and can be stored in a v4 UDF when the application is submitted.

Use the standard UDF creation process within One v4 (**Administration | Tools | UDF Management**) to create a new UDF and add it to panel 33 of the Student Details entity. Suggested values are:

- Field Name: TYOFAPPREF
- Field Label: Portal TYOF Application Reference
- The value of the Field Name should be entered in the configuration process.

### Create a UDF for the second applicant details

If you choose to allow second applicants to perform an ECS check for an application, then their details can be stored in a v4 UDF when the application is submitted.

Use the standard UDF creation process within One v4 (**Administration | Tools | UDF Management**) to create a new UDF and add it to panel 33 of the Student Details entity. Suggested values are:

- Field Name: TYOFSECAPP
- Field Label: Portal TYOF Application Second Applicant Details
- The value of the Field Name will be needed later in the configuration process.

### Create a UDF for the placement reference number

When a placement is submitted for Two Year Old funding, a unique placement reference number is created and can be stored in a v4 UDF.

Use the standard UDF creation process within One v4 (**Administration | Tools | UDF Management**) to create a new UDF and add it to panel 33 of the Student Details entity. Suggested values are:

- Field Name: TYOFPLAREF
- Field Label: Portal TYOF Placement Reference
- The value of the Field Name should be entered into the Provider Portal administration area.

## Creating Dummy Bases for Applications

When making applications from the Citizen Portal, all parent/carers, child, and address details are passed through the One B2B module for matching to existing records in One. In order to distinguish the data submitted via the portal from other schools data, all applications for FSM, Transport, Training Manager v4 and Two Year Old Funding will be assigned to a “dummy” base within One. It is recommended that you create a dummy base for each application type. The base creation process can be done in either the v4 Client or v4 Online.

Use the v4 One Bases module to create bases for use within the Citizen Portal. A school number (DES\_NO) is required for the bases to enable import data into One. Make a note of the Base ID values for the configured bases and enter these into the portal administration area.

## Creating a Dummy Base in One v4 Client

To import applications from the Citizen Self Service portal, a dummy base must be created as a B2B Student Base and a user must be mapped to the dummy base to identify that a record has been received from the Citizen Self Service portal. A dummy base should be created for each type of application that will be submitted via the Citizen Self Service portal.

**WARNING!** When creating the dummy base for Transport applications, you must ensure the base has a **School No.** entered. If you do not enter a **School No.**, Transport applications cannot be processed.

To create a dummy base with a mapped user:

1. Select One v4 **Client | Focus | Bases | Bases | New** to display the **Base Definition** screen.
2. On the **Basic Details** panel, enter a **Name**.
3. Click the **Base Type** drop-down and select one of the options.
4. Click the **LA** drop-down and select your local authority

1. Basic Details

Name: Citizen PortalFSM Dummy Base

Official Base Name:

Base Type: Other

LA: Local Authority

Control:

Education Office:

SEN School Type: Ordinary School

Cost Centre:

School No.: 1111

URL:

URN:

Active: ☒

Inactive Date:

Inactive Reason:

Send To Contact Point: ☒

B2B Student Base: ☒

5. Enter the **School No.**
6. Select the **B2B Student Base** check box.
7. Click the **Save** button to display the **Users (<dummy base>)** dialog.

Users (Citizen Portal FSM Dummy Base)

Please type the search criteria in the 'Looking For' to scroll to the item you wish to select

Looking For: Search by: User Name

Select

User Name	Description	Mapped To Base	B2BS User
PORTALADMIN1	Portaladmin1	No	No
PORTALADMIN2	Portaladmin2	No	No
PORTALADMIN3	Portaladmin3	No	No
PORTALUSER1	Portaluser1	No	No
PORTALUSER2	Portaluser2	No	No
PORTALUSER3	Portaluser3	No	No

8. Highlight the user and click the **Select** button. One maps this user to the dummy base, and the user is designated as the portal user.

9. Click the **Save** button to save the record.

The User\_ID is used to update the **Last Updated** field in the relevant area of One, identifying that the record was submitted via the Citizen Self-service portal.

10. Repeat the above procedure for each type of application.

## Creating a Dummy Base in One v4 Online

To import applications from the Citizen Self Service portal, a dummy base must be created as a B2B Student Base and a user must be mapped to the dummy base to identify that a record has been received from the Citizen Self Service portal. A dummy base should be created for each type of application that will be submitted via the Citizen Self Service portal.

**WARNING!** When creating the dummy base for Transport applications, you must ensure the base has a **School No.** entered. If you do not enter a **School No.**, Transport applications cannot be processed.

To create a dummy base with a mapped user:

1. Select **One v4 Online | Bases | Add New Base**.
2. Enter the **Name** of the dummy base.
3. Enter the **School No.**
4. Click the **LA No** drop-down and select your local authority.
5. Click the **Base Type** drop-down and select one of the options.

The screenshot shows the 'Add New Base' form. The 'Name' field is 'Citizen Portal FSM Dummy Base'. The 'School No.' and 'LA No.' fields are empty. The 'Base Type' dropdown is set to 'ORD - Ordinary School'. The 'B2B Student Base' checkbox is checked. The 'Save' button is highlighted.

6. Select the **B2B Student Base** check box to display the **Users (<dummy base>)** dialog.

The screenshot shows the 'Users(Citizen Portal FSM Dummy Base)' dialog. It contains a table with the following data:

User Name	Description	Mapped to Base	B2BS User
PORTALADMIN1	Portaladmin1	No	No
PORTALADMIN2	Portaladmin2	Yes	No
PORTALADMIN3	Portaladmin3	Yes	No
PORTALUSER1	Portaluser1	Yes	No
PORTALUSER2	Portaluser2	Yes	No
PORTALUSER3	Portaluser3	Yes	No

The 'Select' button is highlighted.

7. Highlight a user and click the **Select** button to return to the **Base Details** screen. One maps this user to the dummy base, and the user is designated as the portal user.
8. Click the **Save** button to save the record.

The User\_ID is used to update the **Last Updated** field in the relevant area of One, identifying that the record was submitted via the Citizen Self Service portal.

9. Repeat the above procedure for each type of application.

## Setting up the Scheduled Task

The Citizen Self Service portal sends emails to users on updates to Free School Meals or Transport applications. It is possible to create and execute a scheduled task on a daily basis to remove messages from the system once they reach a certain age.

**WARNING:** Once messages are removed, there is no way to recover the content.

To create a new scheduled task, complete the following procedure:

1. In the One v4 Client, select **Tools | Administration | Scheduled Task** to display the **Schedule Task** page.
2. Click the **New** button to display the **ScheduleTask[]** page.
3. Enter a **Name**.
4. From the **If the task is already running, then the following rules applies** drop-down list, select **Do not start a new instance**.
5. From the **Logging Level** drop-down, select **Detailed**.
6. De-select the **Enabled** check box.
7. Select the required **Application Server**.
8. On the **Trigger** panel, click the **Add** button to display the **Trigger** dialog.
9. Select the **Daily** radio button.
10. Select a **Start** date and time then enter 1 in the **Recur every days** field.
11. Click the **Ok** button to close the dialog.
12. On the **Actions** panel, click the **Add** button to display the **Action** dialog.
13. From the **Action** drop-down, select **Citizen Portal Delete Messages**.
14. Click the **Ok** button to close the dialog.
15. Click the **Save** button.

The time that the task runs, and the **Enabled** flag, can be managed through the Citizen Portal administration area.

## Portal Configuration

An Administrator, with the appropriate permissions, can edit the Portal Configuration settings, thus changing the setup and the behaviour of the Citizen Self Service portal.

The **Portal Configuration** functionality is accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration**. Click the **Portal Configuration** button to display the **Site Settings** page.

For more information, see [Configuring the Site Settings](#) on page 16.



## Configuring the Site Settings

The **Site Settings** pages are accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration**. From here you can configure the following settings:

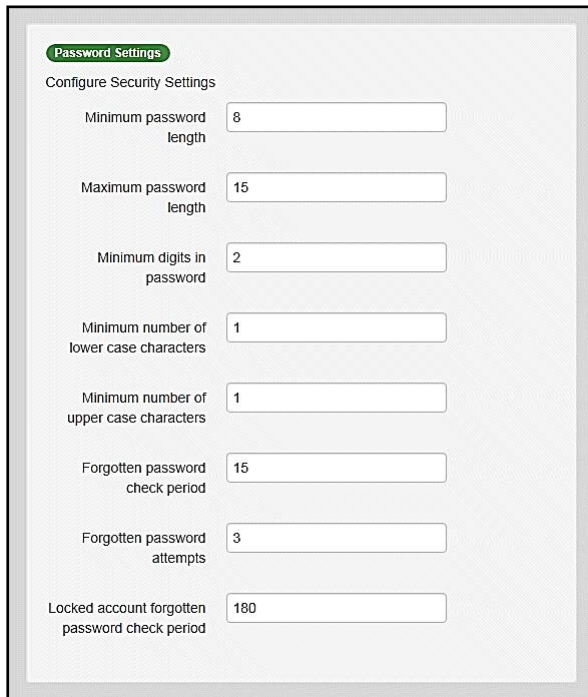
- Password Settings
- ECS Settings (Eligibility Checking Service)
- Application Settings
- Message Settings
- Application Type Settings
- Scheduled Task Settings.

## Configuring Password Settings

The **Password Settings** panel is used to set the security settings applied to users during registration and login.

To configure the password security settings:

1. Select **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.
2. On the **Password Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.



The screenshot shows the 'Password Settings' panel with the following fields and values:

Field	Value
Minimum password length	8
Maximum password length	15
Minimum digits in password	2
Minimum number of lower case characters	1
Minimum number of upper case characters	1
Forgotten password check period	15
Forgotten password attempts	3
Locked account forgotten password check period	180

3. Click the **Save** button.

## Configuring ECS Settings

The **ECS (Eligible Checking Service) Settings** panel is used to store the credentials and information used for connection to the Department for Education (DfE) online checking service.

**IMPORTANT NOTE:** The ECS batch validation check now calls the external DfE website from the integration server (formerly it was called from the One web server). In order to communicate with the DfE ECS, you must ensure that any firewalls in your One environment allow access to the following DfE URLs:

**Prototype -**

<https://fsm2.education.gov.uk/webservices/prototype/20160901/OnlineQueryService.svc>

**Sandpit -**

<https://fsm2.education.gov.uk/webservices/Sandpit/20160901/OnlineQueryService.svc>

**Accreditation -**

<https://fsm2.education.gov.uk/webservices/Accreditation/20160901/OnlineQueryService.svc>

**Production -**

<https://fsm.education.gov.uk/fsm.lawebbservice/20160901/OnlineQueryService.svc>

**Production (for systems that connect via GSI/PSN) -**

<https://fsm.education.gsi.gov.uk/fsm.lawebbservice/20160901/OnlineQueryService.svc>

To configure the ECS settings:

1. Select **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.
2. On the **ECS Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

**ECS Settings**

Configure the link to the DWP Eligibility Checking Service

ECS Mock eligibility status	<input type="text" value="Eligible"/>
ECS Mock error status	<input type="text" value="Success"/>
ECS environment	<input type="text" value="mock"/>
ECS local authority	<input type="text" value="Capita One"/>
ECS username	<input type="text" value="Capita 18675"/>
ECS password	<input type="password" value="••••••••"/>

3. Click the **Save** button.

### More Information:

*Technical Guide - Setting Up One Headcount for Local Authorities*

*Technical Guide - Setting Up Training Manger v4 for Local Authorities*

*Technical Guide - Setting Up Two Year Old Funding for Local Authorities*

Available from the One Publications website (<http://www.onepublications.com>).

## Configuring Application Settings

The **Application Settings** panel stores the settings used when submitting applications via the Citizen Self Service portal.

To configure the application settings:

1. Select **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.

2. On the **Application Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

The screenshot displays the 'Application Settings' panel with the following fields and values:

- Admissions Online URL:** [Empty text field]
- Free School Meals application prefix:** FSM
- Free School Meals dummy base id:** [Empty text field]
- Transport application prefix:** TRA
- Transport dummy base id:** [Empty text field]
- Permitted Titles:** Mr,Mrs,Miss,Ms,Dr,REV,Prof
- Permitted Relationships:** PAM,PAF,STM,STF,FOM,FOF,FAM,TCH,SWR,OTH
- School Place application Permitted Faiths:** [Empty text field]
- Two Year Old Funding Application Prefix:** TYF
- Two Year Old Funding Placement Prefix:** PLA
- 2 Year Old Funding Dummy Base Id:** [Empty text field]
- 2 Year Old Funding application reference UDF field name:** TYOFAPPREF
- 2 Year Old Funding application second applicant UDF field name:** TYOFSECAPP
- The current school base group:** [Empty text field]
- Training Manager Schools base group:** [Empty text field]
- SEND Dummy Base Id (Shared with Professional Portal):** [Empty text field]
- SEND Form Submission Notification Email Addresses:** [Empty text area]

3. Enter the details of the UDFs you created earlier.
4. Click the **Save** button.

**More Information:**

*Technical Guide - Setting Up One Headcount for Local Authorities*  
*Technical Guide - Setting Up Training Manger v4 for Local Authorities*  
*Technical Guide - Setting Up Two Year Old Funding for Local Authorities*

Available from the One Publications website (<http://www.onepublications.com>).

## Configuring Message Settings

The **Message Settings** panel holds the values used when sending and displaying messages from the Citizen Self Service portal.

To configure the message settings:

1. Select **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.
2. On the **Message Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

The screenshot shows the 'Message Settings' panel with the following fields:

- From address for outbound messages:** A text input field.
- Pre-configured email address:** A text input field.
- 2 Year Old Funding Voucher Message Template:** A dropdown menu with 'Two year old funding voucher' selected.
- 2 Year Old Funding Ineligible Message Template:** A dropdown menu with 'Two year old funding ineligible application' selected.
- 2 Year Old Funding Move into area Voucher Template:** A dropdown menu with 'Two year old funding voucher moving application' selected.
- 2 Year Old Funding late moving voucher template:** A dropdown menu with 'Two year old funding voucher late moving applic...' selected.
- The Portal url:** A text input field.

3. Click the **Save** button.

**More Information:**

*Technical Guide - Setting Up Two Year Old Funding for Local Authorities*  
 Available from the One Publications website (<http://www.onepublications.com>).

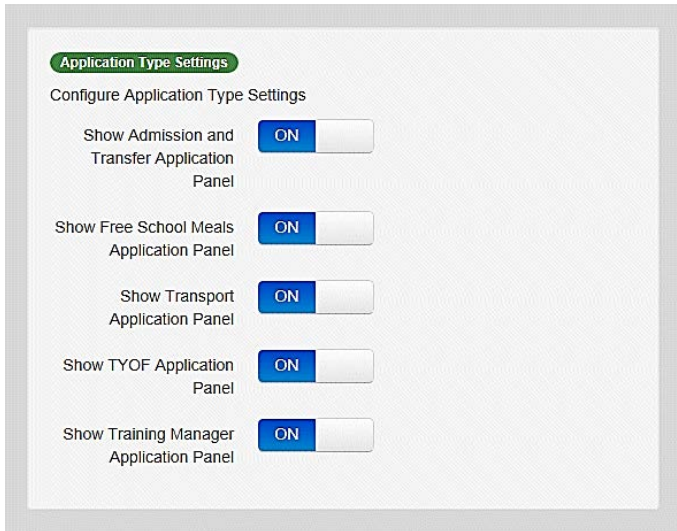
## Configuring Application Type Settings

The **Application Type Settings** panel controls the availability of the panels on the parents, guardians and carers **Home** page.

To configure the application type settings:

1. Select **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.

2. On the **Application Type Settings** panel toggle the panels **ON** or **OFF** as required. Click in a field to display the relevant tooltip.



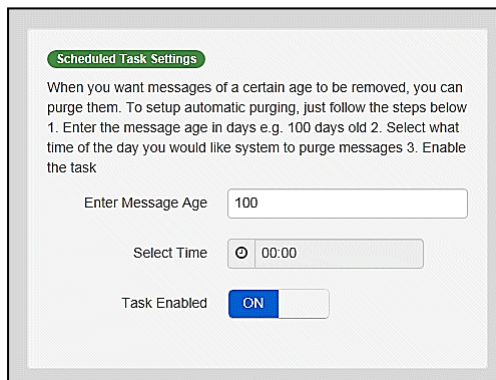
3. Click the **Save** button.

## Configuring Scheduled Task Settings

The **Scheduled Task Settings** panel is used to control the task that removes old messages from the One database. Although you can control some options for the Scheduled Task from here, the task must first be set up in the One v4 Client.

To configure the scheduled task settings:

1. Select **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.
2. On the **Scheduled Task Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.



3. Click the **Save** button.

**NOTE:** These settings only affect the Citizen Self Service portal; they do not affect Scheduled Tasks set up in One v4 Client.



## 04 / What Next?

The One Citizen Self Service portal platform is now configured. However, there are additional tasks that must be completed for individual modules to ensure that the One environment is configured correctly. The following documents are available from the One Publications website (<http://www.onepublications.com>):

- Module specific back end setup
  - *Technical Guide - Setting Up One Headcount for Local Authorities*
  - *Technical Guide - Setting Up Training Manger v4 for Local Authorities*
  - *Technical Guide - Deploying and Configuring Transport v4 for Local Authorities*
  - *Technical Guide - Setting Up Two Year Old Funding for Local Authorities*
- Module specific administration and usage
  - *One Free School Meals Citizen Portal Handbook*
  - *One School Places Citizen Portal Handbook*
  - *One Training Manager Courses Citizen Portal handbook*
  - *One Training Manager v4 Handbook*
  - *One Two Year Old Funding Citizen Portal Handbook*
  - *Transport Online Handbook*

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