



One InSight Release Notes January 2020

January 2020

CAPITA

Revision History

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Contacting One Application Support

You can log a call with One Application Support via the Customer Service tool available on [My Account](#).

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments on any aspect of our documentation, please email:

onepublications@capita.co.uk

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

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Document Purpose

These release notes are provided to users with detail of the One InSight release and instructions for downloading the release installation media are also included.

Should you have any questions about the implementation, testing, or user impacts of the information detailed in this document, please contact the One Application Support Team.

Upgrading the Software

Compatibility with Capita One

The One Education InSight release contains integration to the One InSight Reporting Platform and is designed to be compatible with the following versions of the Capita One system:

- 3.70 Including Service Pack 1

If you are running an older version of Capita One and wish to install and configure One InSight, you must upgrade to at least the 3.70 Service Pack 1 release prior to installation.

Software Distribution

The One InSight January 2020 release is available as a download only. One Co-ordinators will be emailed with the password to enable them to unzip the installation media as well as links to the self-extracting installation files.

Changes in the New Release

New Functionality: Integration of One Education to One InSight Reporting Platform

Introduction

Capita One's product team are pleased to be able to deploy One InSight, a single flexible platform across all Capita One products. Focussing on a single reporting and analytics solution will; create transferrable skills within local authorities; enable Capita One to better support customers; foster a user community that is self-supportive and pushes the capabilities of the product to its maximum.

The One InSight platform was created by One Housing and has supported the needs of Capita One Customers for several years within Housing, Revenues and Benefits and Digital with well over 200 implementations.

This first phase of development with One Education gives the platform access to the One Analytics Data Warehouse and the 'InSight Web Dashboard' which enables report content to be shared internally and externally via a web-based application. This Web-Dashboard offers Authorities the ability to share content efficiently and securely with organisations outside the LA network e.g. schools and providers. The content is context sensitive so that only data relevant to the organisation is shared with them.

Initial One InSight Installation and Setup

The 3.70 Service Pack 1 is required so that core changes are made to the One Education system.

Please refer to document '*TG Installing and Configuring One InSight.pdf*' and in section 2 for full details to install and configure One InSight Platform and Integration components.

<https://onedocumentationwp.azurewebsites.net/wp-content/uploads/2020/01/One-InSight-Install-and-Configure-Technical-Guide.pdf>

The installation of InSight will implement the following architecture.

- InSight Configuration SQL DB - A new SQL DB required by the One InSight platform to store and manage key information such as Licences, Users, User Groups, Report Folders, Reports etc.
- 'InSight API' – A new web service that manages the synchronisation of One Education Users to the One InSight Platform.
- 'InSight Web Dashboard' – A new web-based application that enables report content to be accessed internally via V4 Online and externally via Provide Portal.
- 'InSight Desktop Client' - A thick client application required by Administrators to create and manage reports, the structure to how they are displayed within the Web Dashboard, user groups and what reports they have access to, but can also be used to view content.
Only user(s) who task it is to administer content will require the Desktop Client to be installed.

Note: Please contact the One Application support Team and log a case to request One InSight Licences.

The licences provided have a 3-day expiry period, therefore it is strongly advised to log the request once 3.70 Service Pack 1 has been applied and install and configuration of InSight is planned to take place within 24-hours of the licence request.

Changes in the New Release

Once the initial installation is successfully completed and licences applied to the system the administrator can now start to manage access to report content.

Please refer to document ‘InSight Reporter (desktop client) 3.2.5 user guide.pdf’ for guidance on how to use the One InSight Desktop application. This document is available from [One Publications](#).

For new installations the following sections will provide the required information for creating User Groups, managing report content and which User Groups can see and process permitted content.

- Section 10.1 – User Management | Creating Groups
- Section 12.1 – 12.16 – Report and Link Management

Managing Permissions and accessing ‘One InSight Web Dashboard’

One InSight can be accessed from within V4 Online for internal use and Provider Portal to enable external access to content securely. This is controlled by having a valid ‘One Analytics’ licence and the permissions noted below.

Permitting access to One InSight Web Dashboard

The required permissions are described below and can be applied within One Education V4 Client | Tools | Permissions | User Group Permissions.

- **‘One InSight’ v4 online lozenge** - Select main process ‘One Analytics’ and provide ‘Read’ access to business process ‘One Insight’

01. Main Processes				
Main Business Processes	One Analytics			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
One Analytics	✖			
Access to Console				✔
eStart Matching				✔
▶ One Insight	✔			
Predict & Prevent				✔

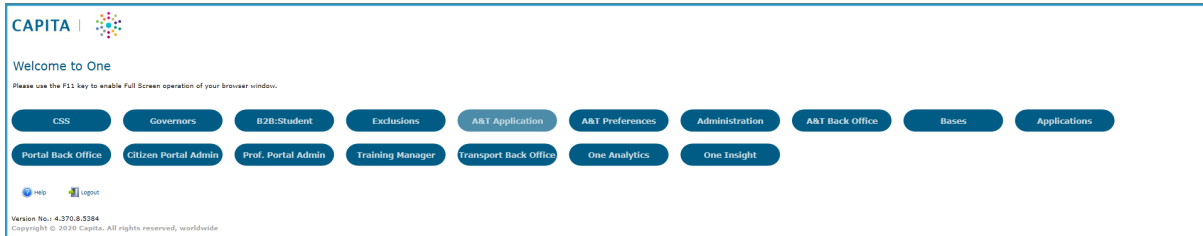
- **Provider Portal ‘One InSight’ tile** - Select main process ‘Provider Portal’ and provide ‘Read’ access to business process ‘One Insight’

01. Main Processes				
Main Business Processes	Provider Portal			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
Provider Portal		✖		
Better Start Administrator		✖		
Better Start User				✔
Disability Access Fund Administrator				✔
Disability Access Fund User				✔
Disability Access Funding Manager				✔
Early Years Pupil Premium				✔
EPM Administrator		✖		
EPM Base		✖		
EPM Plan		✖		
EPM Reporter				✔
EPM Services		✖		
EPM User		✖		
General Site Administrator		✖		
Headcount Site Administrator		✖		
Headcount Task Viewer	✖			
Headcount User				✔
▶ One Insight	✔			
Reporting		✖		

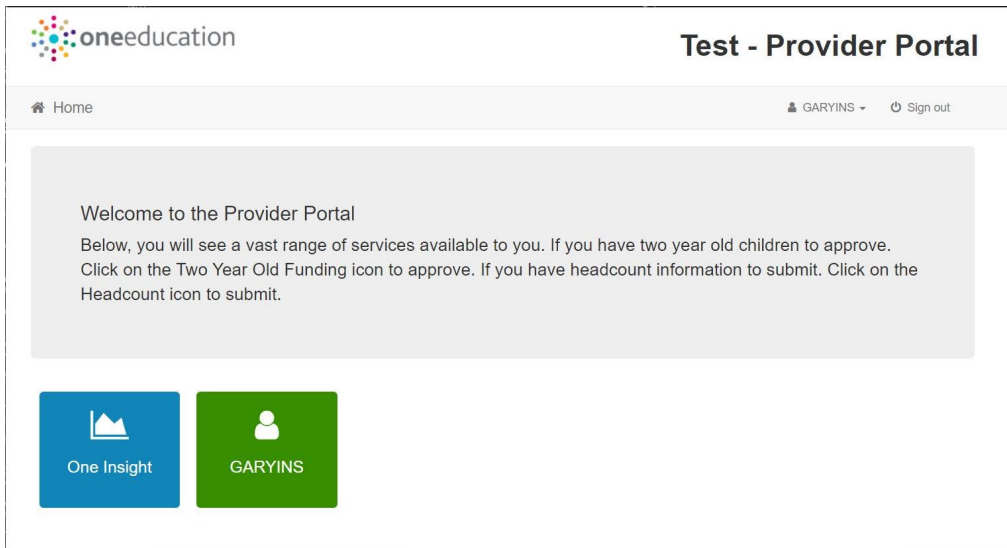
Note: Users flagged as 'System Admin.' will not automatically be granted permission to One InSight and need to be manually provided permission as documented above.

Accessing One InSight

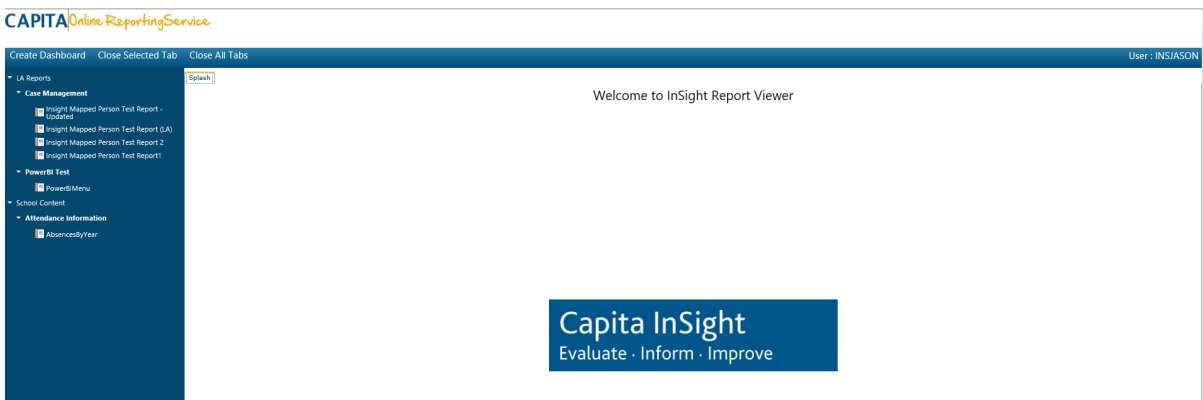
Internal LA users can access 'One InSight' where permitted via the 'One InSight' lozenge displayed on the One Education V4 Online home page.



External access for permitted users is provided via the 'One InSight' tile displayed Provider Portal home page.



Navigating to 'One InSight' from both v4 online and Provider Portal will open a new browser window launching the 'InSight Web Dashboard' as shown below.



The left panel displays Report Folders and reports to which the user has been permitted to run and in the top right of the screen the 'User' is displayed, this is now the One InSight user which has been synchronised from One Education.

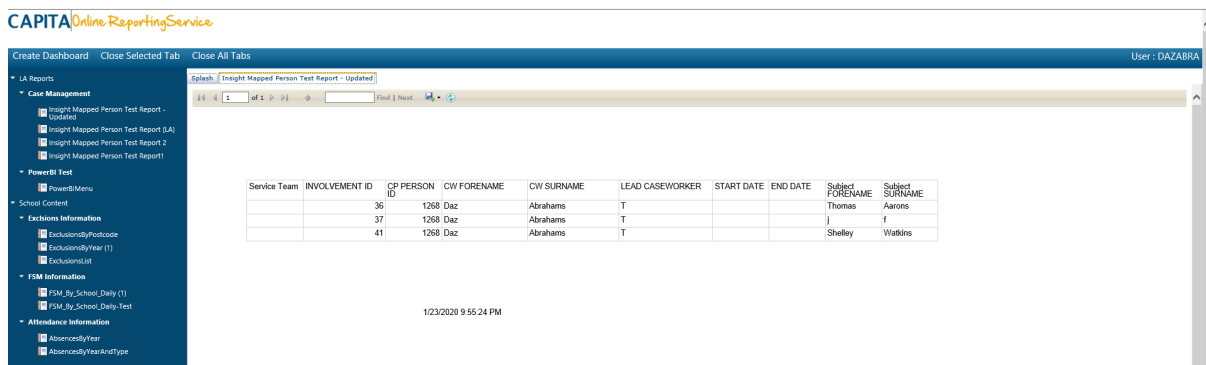
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To process a report simply open a report folder and select a report from the left side panel and it will be appropriately processed by the system.

Note: If there are parameters in the reports these will be requested upon runtime and in the right side of the screen.



Where a report has been selected and processed a new tab will be opened with the name of the selected report and once completed processing will display the output.



Reports can be created to automatically filter the output of the report base on the 'Mapped Person' and or 'Mapped Base' associated with the One Education user. For detail refer to section '*Filter Report Output by One Education User Mapped Base or Person*'.

Synchronising One Education Users to One InSight

The integration of One Education to One InSight has been designed such that users do not need to be manually created within One InSight.

The process of synchronising users is managed by a new schedule task action 'InSight User Synchronisation' whereby users with appropriate access will be synchronised and licenced within the One InSight platform.

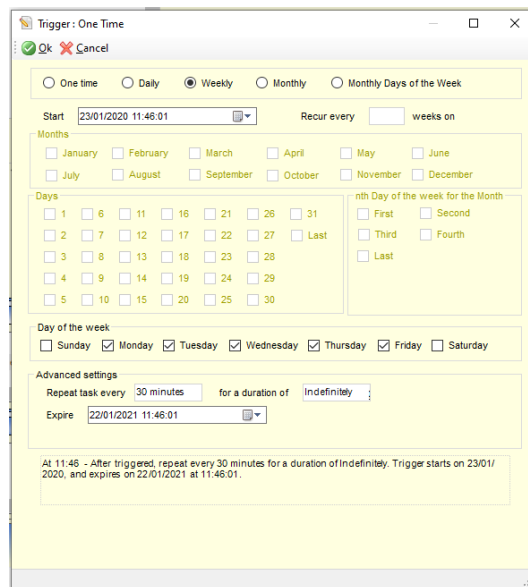
It is strongly advised to not directly create or delete users from within the One InSight Desktop client except where additional users are required to administer reports and access to content.

A One Education user is synchronised with One InSight where permitted to either ‘One InSight’ business process and the user is active.
Where permission has been removed or the user is made inactive the user will be unlicensed within One InSight platform.

A new schedule task will need to be created with action ‘InSight User Synchronisation’ selected.

The synchronisation process should be setup for processing frequently enough based on how often users may be granted access.

The example below is for the routine to be processed every 30 minutes Monday – Friday and weekly.



Where the schedule task has been processed an output of the how users have been processed will be provided within panel ‘05. History’.

The number of records processed will be logged for each point as defined below.

- X user synchronised – The total number of users processed
- Created and licenced - The One Education user has been created in the One InSight Platform and granted the appropriate licence to only access and use the ‘InSight Web Dashboard’
- Unlicenced – Licences have been removed for inactive users and or users who no longer permitted to a ‘One InSight’ business process.
- Licenced – The One Education user has been granted the appropriate licence to only access and use the ‘InSight Web Dashboard’
- Failed – There was an issue when trying to synchronise the user account. Typically, this could be where applying a licence failed within InSight and normally corrects itself on the subsequent processing of the synchronisation process.

Where records continue to fail it is advised to raise a support case with One Education Application Support so that further assistance can be provided.

Filter Report Output by One Education User Mapped Base or Person

Reports processed against the One Education system may require the output to be automatically filtered so that information is only displayed to appropriate personnel or organisations but also to ensure adherence to GDPR legislation.

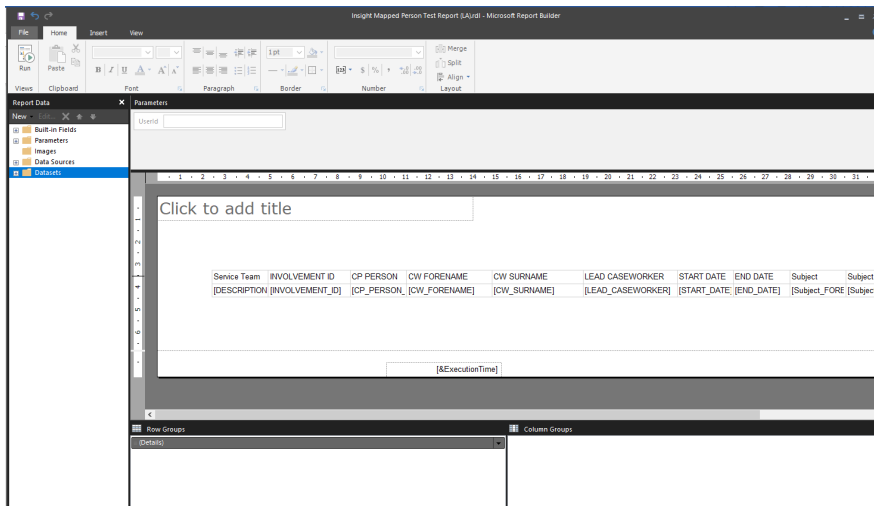
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To enforce the output of an SSRS report to be automatically filtered, this can be controlled in several ways based on the implementation of the report and so a hardcoded filter may exist in the query or a 'Hidden' parameter applied.

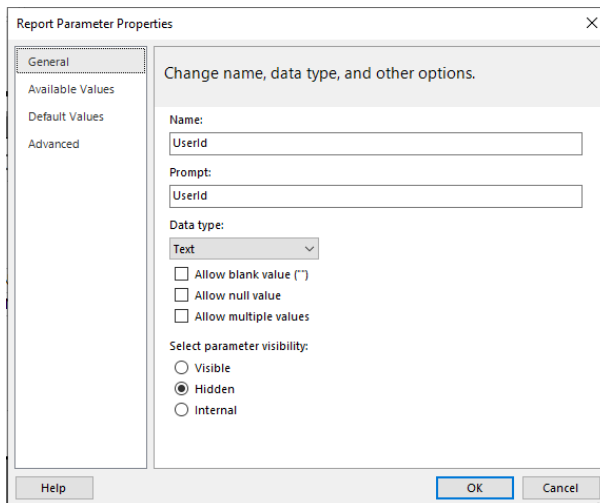
Users with enough knowledge of SSRS and report writing skills can follow the instructions below as a guide to create a hidden parameter to automatically filter the output of the report.

This section describes the process of ensuring the output of a report is automatically filtered based on the 'Mapped Person' or 'Mapped Base' of the One Education user who has access the 'InSight Web Dashboard'.

1. Open the SSRS report within the appropriate version of MS SQL Server Report Builder. The guide is based on version 5.0 but would be similar for earlier version 3.0.



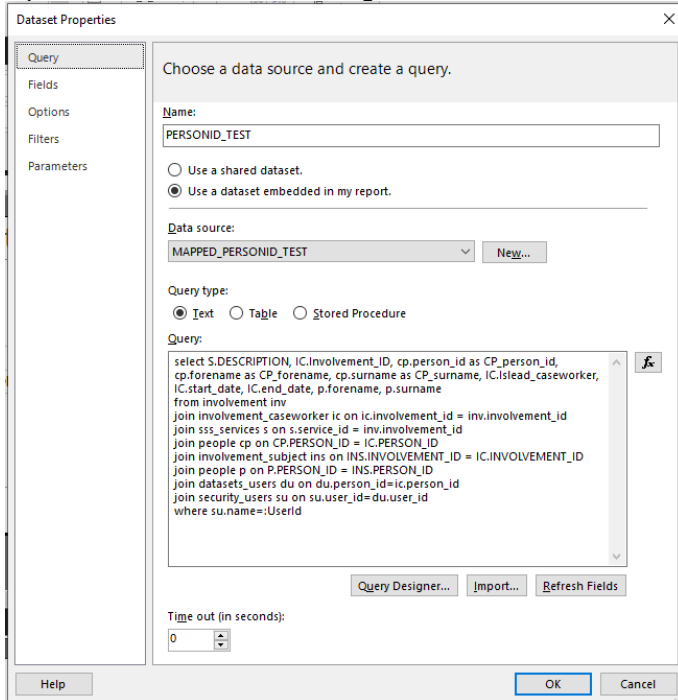
Select section 'Parameters', if no parameters exist then now is the time to create one, ensure it is named appropriately. E.G. 'Userid' or 'Report_User' and 'Mapped_Base' or 'Baseld'.



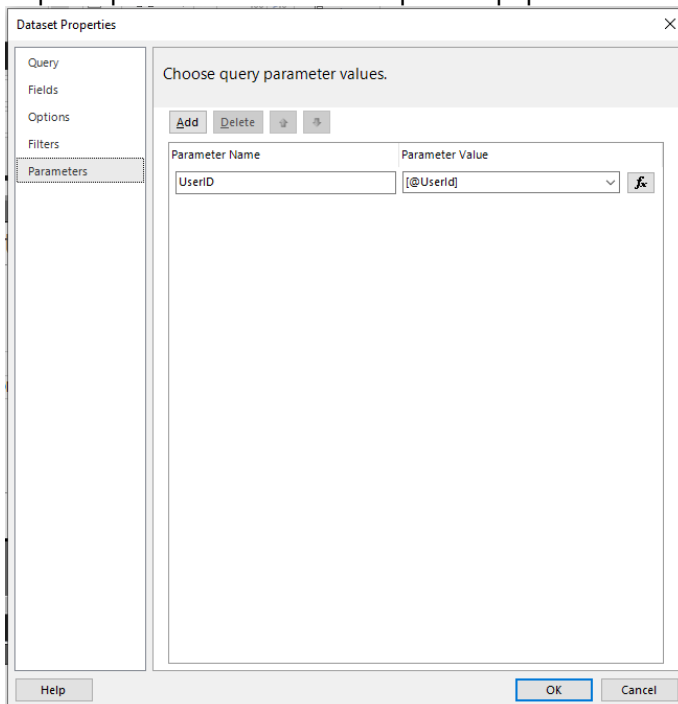
Within the 'Report Parameter Properties' dialogue setup the parameter as describe below.

2. General | 'Select parameter visibility' section and select 'Hidden'.
3. Default Values - select 'Specify values'
4. Select 'Add' and with the 'Value' field type '[&XX]', where 'XX' is the name of the parameter value created and select 'Ok'
5. The parameter value now needs to be added into the 'Datasets' query so that the output is filtered appropriately.

- Open the 'Datasets' section, right click the dataset to be filtered and select 'Dataset Properties'



- Select the 'Parameters' option, select 'Add' and in the 'Parameter Value' field select the required parameter created in step 2 and populate the 'Parameter Name' field. E.G. 'UserId'.



- Select the 'Query' option and add the parameter in to the SQL query in a 'Where' clause.

The One Education user information is stored in DB Table SECURITY_USERS and then mapping information is stored within the DATASETS_USERS Oracle DB table. To ensure data is filtered appropriately in the report based on the user running the report both will need to be referenced in the SQL query to get the required information for the report.

The example query below would filter results based on the mapped person for the one education user. The ':UserId' value will be populated with the One Education User Name of who is running the report and for the example provided the mapped person on the highlight line

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is the relationship of the mapped person to the Involvement_Caseworker. This means that only involvements would be displayed for the user's mapped professional.

```
select S.DESCRPTION, IC.Involvement_ID, cp.person_id as CP_person_id, cp.forename as CP_forename,
cp.surname as CP_surname, IC.Islead_caseworker, IC.start_date, IC.end_date, p.forename, p.surname
from involvement inv
join involvement_caseworker ic on ic.involvement_id = inv.involvement_id
join sss_services s on s.service_id = inv.involvement_id
join people cp on CP.PERSON_ID = IC.PERSON_ID
join involvement_subject ins on INS.INVOLVEMENT_ID = IC.INVOLVEMENT_ID
join people p on P.PERSON_ID = INS.PERSON_ID
join datasets_users du on du.person_id=ic.person_id
join security_users su on su.user_id=du.user_id
where su.name=:UserId
```

The same approach should be applied to filter by the mapped base and use the DATASET_USERS.BASE_ID value. The example provided below would filter the claims in the output to be for the mapped school hence note the highlighted table relationships.

```
select b.base_id, b.base_name, s.stud_id, s.surname, s.forename, s.DOB, s.NCY, c.claim_id, c.start_at, c.end_at
from claims c
inner join student s on s.stud_id=c.stud_id
inner join bases b on b.base_id=s.base_id
inner join datasets_users du on du.base_id=b.base_id
inner join security_users su on su.user_id=du.user_id
where su.name=:UserId
```