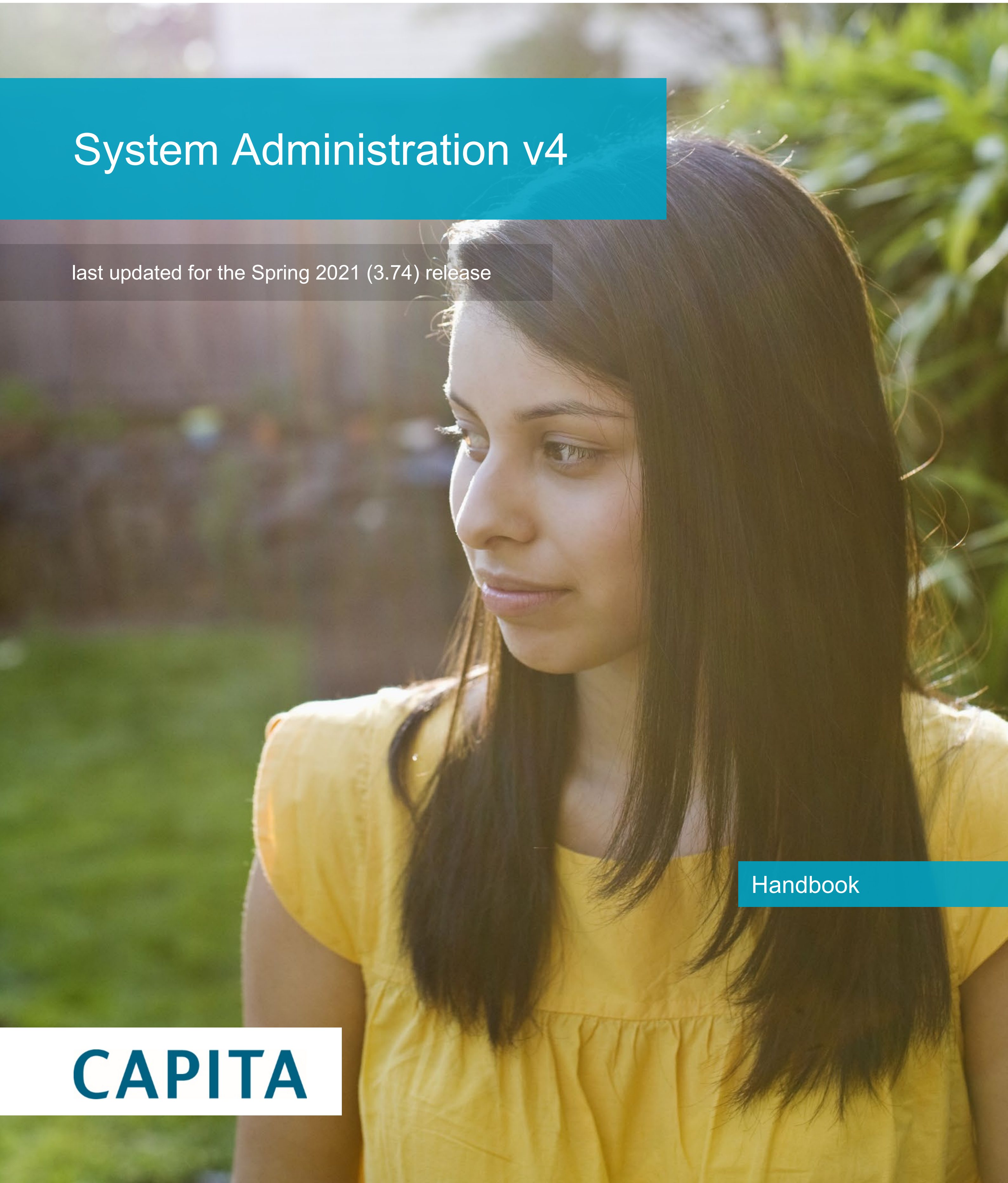
oneeducation

System Administration v4

last updated for the Spring 2021 (3.74) release



Handbook

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01 | Document Change Control

Date	Release	Description
Spring 2021	**3.74**	An additional **Parameter Code** has been added to the **System Defaults** table to control how the system searches for completed reports in both v4 client and v4 online: CRSEARCH See *System Defaults* on page *9*. See *Completed Reports Defaults* on page *18*
Autumn 2020	**3.73**	An additional **Parameter Code** has been added to the **System Defaults** table to enable students/carers to be matched by GUID in B2B: GUIDMATCH See *System Defaults* on page *9*.
		Additional GIS **Parameter Codes** have been added to the **System Defaults** table to configure the **Map & GeoLocation** tab in the Address Management | Manage Addresses screen. See *System Defaults* on page *9*.
		A new option has been added to allow local authorities to see stored external GUIDs, so that they can verify that data is being matched properly. See *Introduction to Manage External GUIDs* on page *58*
Spring 2020	**3.71**	An additional **Parameter Code** has been added to the **System Defaults** table to enable B2B caching: B2BHCACHE. See *System Defaults* on page *9*.
Autumn 2019	**3.70**	**System Administration, Archive & Delete** and **Managing Addresses** are now separate handbooks.

Date	Release	Description
Autumn 2019	**3.70**	**Archive and Delete** A **Filter Text** field is available on the **Data Management | Delete Configuration | Identification Reports** page to enable you to refine your reports search. See *Defining the Delete Configuration* on page 1. The **Data Management | Delete Configuration** tab has been updated to include the ability to delete Governors information. See *Defining the Delete Configuration* on page 1. Additional **Parameter Codes** have been added to the **System Defaults** table.
Summer 2019	**3.69**	**Archive and Delete** The **Archive and Delete** process has been improved, so that the process to manage records is more effective and efficient:It is now possible to remove sections of a record according to an LA's retention policy. 2 new business processes have been added to the D**ata Management Business Process** in the v4 Client. See Setting Up Capita One Permissions on page 1. A new tab, **Delete Configuration**, enables the System Administrator to select which sections of a record can be deleted. See Defining the Delete Configuration on page 1. A new button, **Delete Selected Records**, is available when the **Manual Search** option is selected to delete records. See Manual Search on page 1. A new button, **Delete All Identified Records**, is available when the **Report Search** option is selected to delete records. See Report Search on page 1 and Completed Reports on page 1. The **Delete Records** dialog has been updated to make it clearer to understand the number of records to be deleted and the **Archive Report Status Summary** is easier to understand. See Deleting Records on page 1.

Spring 2019	**3.68**	Archive and Delete tab renamed to Sys Admin tab. See *Uploading Reports* on page 1.
		The process of merging two children who attend the same Early Years funded service within the same term has been amended allowing the two records to merge more effectively. For more information see *Merging Early Years Funded Children* page *57.*

02 | System Administration

Introduction to the System Administration v4 site

The One System Administration v4 site enables system administrators to configure a range of global options within the One environment. Most of the system level administration is carried out within the System Administration v4 site, although some areas, such as user and group management, are carried out with the v4 Client. The following areas can be managed from within v4:

- System Administration v4 site
  - System admin
    - Personnel control
    - System defaults
    - LA details
    - Online login security parameters
    - Permitted websites
    - Web address validation
    - Ethnic codes (Students)
  - Data Management
    - Archive & delete
    - Delete log
    - Case change
    - Base merge
    - People merge
  - Address management
    - Address auto tidy
    - Address manual tidy
- v4 Client
  - User management
  - Group management
  - User permissions
  - Group process permissions

How to use this handbook

This handbook is intended for system administrators with full access to the One environment and provides all the required information to configure your One environment. However, where appropriate, detailed instructions for specific process have been omitted and cross references to the appropriate handbooks have been provided.

One System Administrators

There are two types of One system administrator. The first is a standard One user who is a member of a user group with elevated permissions to specific areas of the software. Access to the different areas is governed by user group process permissions, which are grouped by main business process. These users do not have the **System Admin** check box selected for their account.

The second type of One system administrator can be a member of any group, but they do have the **System Admin** check box selected for their account. The check box is accessed by searching for the required user in the v4 Client via **Tools | Administration | User Management | User Accounts**. These system administrators can access most areas of One, regardless of the business process access assigned to their group. Currently, the only area a user with the **System Admin** check box selected cannot access is the Archive & Delete area. They must be a member of a group with the required 'Data Management' main business process permissions assigned before they can access the Archive & Delete area.

Setting Capita One Permissions

The System Administration v4 site uses business processes to determine the user groups that have access to specific functionality. Members of that user group inherit the access rights assigned to the group. User groups are assigned Read, Read-Write-Delete or Deny permissions to each business process. Permissions are maintained in the One v4 Client. In order to create new system administrators, an existing One administrator should create user groups with the desired level of access to the following main business process and business processes:

IMPORTANT NOTE:

In order to assign group permissions, a user must be a member of group with Read-Write access to the 'User Group Permissions' and user 'Group Processes' business processes under the 'Administration' main business process. Alternatively, they can have the ***System Admin*** *check box selected against their user account.*

If a row has more than one tick, any of the ticked permissions is valid; assign permissions as required.

Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete	Deny
System Administration		✓	✓	✓	✓
	Ethnic Codes	✓	✓	N/A	✓
	LA Defaults	✓	✓	N/A	✓
	LA Details	✓	✓	N/A	✓

Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete	Deny
	Online Login Security Parameters	✓	✓	N/A	✓
	Permitted Websites	✓	✓	✓	✓
	Personnel Control	✓	✓	N/A	✓
	Web Address Validation Setup	✓	✓	N/A	✓

Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete	Deny
Data Management		✓	N/A	✓	✓
	Archive & Delete	✓	N/A	✓	✓
	Case Change	N/A	✓	N/A	✓
	Delete Log	✓	N/A	N/A	✓
	Merge Base – Students	N/A	✓	N/A	✓
	People Merge	N/A	N/A	✓	✓

More Information:
RG_Permissions reference guide, available from the One Publications website.

Accessing the System Administration v4 Site

There are three methods of accessing the System Administration v4 site. This provides flexible accessibility. The following internal navigation links are controlled by permissions:

- Access directly via the configured URL.
- Access from the v4 Client via **Tools | Administration | System Administration.**
- Access from v4 Online via **Administration | System Admin | System Administration.**

The above menu routes are available if the Capita One user has appropriate permissions to any of the main business processes associated with the System Administration v4 site, including the 'System Administration' and 'Data Management' main business processes. The links are also available to users with access rights to the 'Address Management' main business process, unless their only access is to the 'Import Addresses' business process as this is currently within v4 Online and not the System Administration v4 site.

In order to access the Archive & Delete functionality, you must have a valid Pulse v4 licence.

03 | Managing Personnel Control

Introduction

The **Personnel Control** page enables system administrators to hide personnel information from unauthorised users.

Selecting items on this page hides the relevant field for people records flagged as being under personnel control. The option can only be managed within the Personnel v3 module (except when accessing records via the Personnel module itself).

In the v4 Client, hidden field names are shown in the **Person Details** page, but the information is replaced by a shield icon. This is also referred to as data shielding.

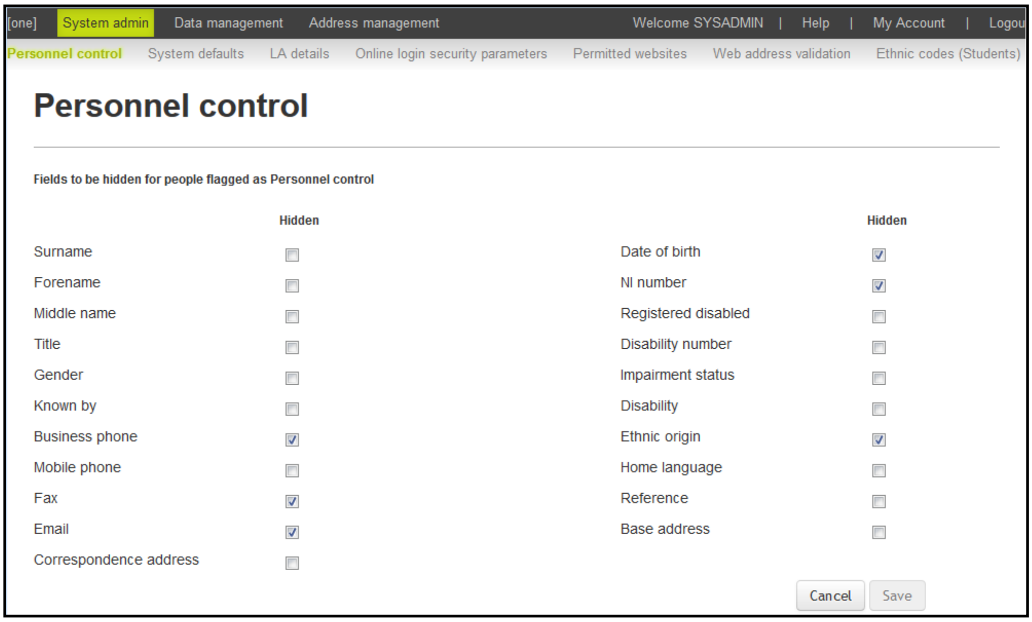
> ***IMPORTANT NOTE:***
>
> *These restrictions apply only to the* ***People Basic Details*** *tab in the v3 Client and the* ***Person Details*** *page in the v4 Client and v4 Online.*

Hiding Fields

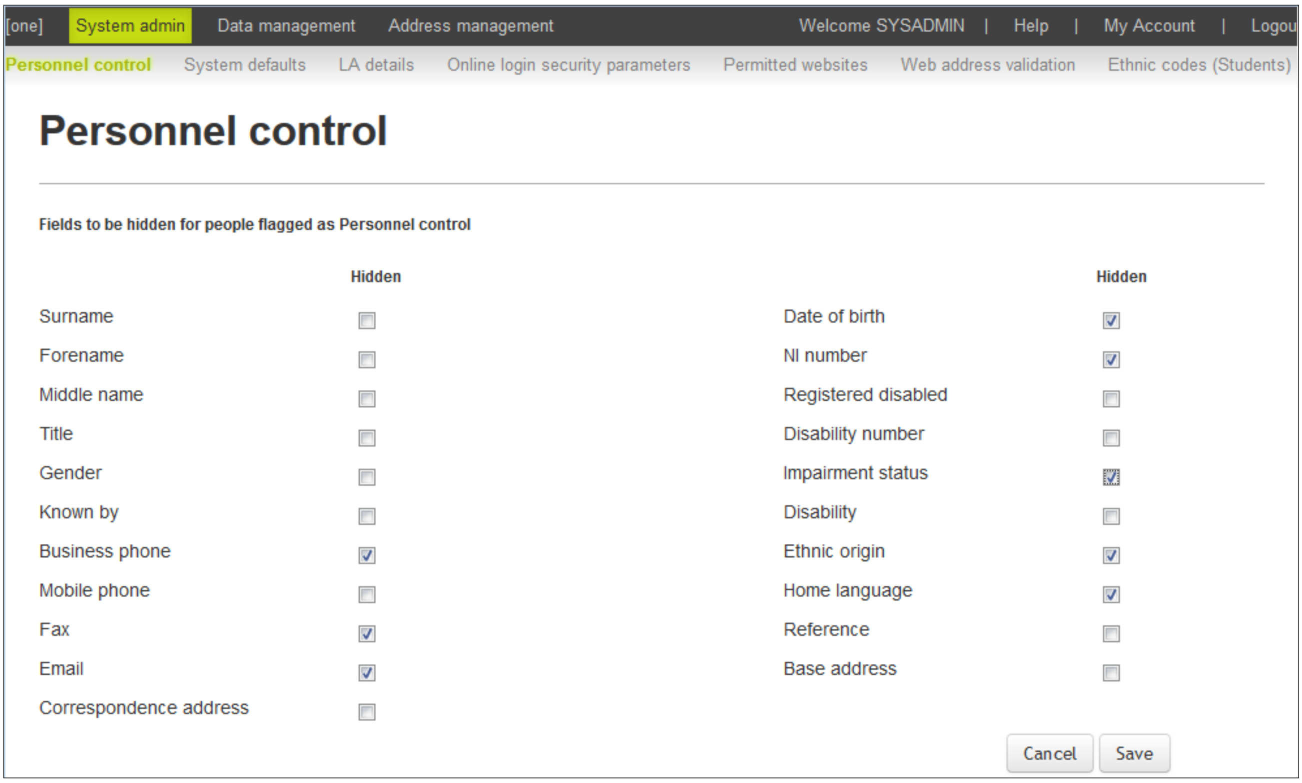
In order to prevent One users from viewing sensitive information associated with people records subject to personnel control, you can hide sensitive field values.

To hide a field so that it cannot be viewed by other One users in the **People Basic Details** tab (v3 Client), or the **Person Details** page (v4 & v4 Online):

1. In the **System admin** area, select the **Personnel control** page to display a list of fields that can be hidden. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6*.



2. In the **Hidden** column, select the check box adjacent to the fields you want to hide.



3. Click the **Save** button. The information in the selected fields will no longer be visible to One users accessing people records with the **Personnel Control** flag activated in v3 Client.

Revealing Hidden Fields

To reveal previously hidden fields:

1. In the **System admin** area, select the **Personnel control** page to display a list of fields that can be hidden. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6*.
2. In the **Hidden** column, de-select the check box adjacent to the fields you want to un-hide.
3. Click the **Save** button. The information in the selected fields is now visible to One users accessing any person records, even those with the **Personnel Control** flag activated in the v3 client.

04 | Editing System Defaults

System Defaults

The **System defaults** page enables a system administrator to set the defaults for certain basic parameters used within One. A **Parameter Code**, **Parameter Value** and a **Description** are listed for each value. As each one is highlighted the field details are displayed, allowing the **Parameter Value** and **Description** to be set appropriately.

IMPORTANT NOTE:

*Unless your use of a field differs from the standard implementation, it is strongly advised that you do not change the parameter **Description**. The descriptions provide important information to administrators on configuring the environment.*

Parameter Code	Full Description
ACAD_YR_ST	Custom Academic Year
ACT_FILTER	A period value (days) for which activities are displayed as default.
ACT_PNL_RN	Renamed panels in Activity Details
ACTPNLRNSV	SVC team Activity panel rename
ADDR_DATA	Address Manager: This is a True or False (Boolean) parameter and is set to False by default. When this parameter is set to True, the AFD value-added address fields in the Address Manager can be edited. Controls whether values Delivery Point Suffix (DPS), Mail Sort Code, STD Code, NHS Code, NHS Region Code, Political Ward and Local Authority can be edited for an address.
ADDR_NAME	How the Addressee Name is formed, referenced by the Addressee default.
ADDR_ST_DE	If set to 'T', when a street is imported and the type is not '1' (has an official name), the description for the street is imported.
ADDRESSEE	The default value applied to the student **Addressee** field when a student record is initially created.
ADR_AMN_AR	Import Admin area as County?
AGENCYLANO	The LA No. migrated agencies are associated with.
ALLPERALRT	Share person, student & ICS Person Alerts.

Parameter Code	Full Description
ALTER_CRIT	The part of any alternative bases that distances are calculated to, by default, when performing an assessment in Transport v4. The valid values are: -1: Nearest site -2: Nearest gate -3: Nearest gate or site -4: Nearest gate, if no gate for a site then nearest site -5: Principal site -6: Main gate. The default value is -1.
ANT_MAT_TG	Match student not in Transfer Group
AP_EY_DATE	The configured Alternative Provision & EY Census Date used by the One system.
APIMAXLMIT	Maximum page size for API request
APP_SRVR_1	The configured URL for the application server.
APP_SRVR_2	The configured URL for the second application server.
APP_SRVR_3	The configured URL for the third application server.
APP_SRVR_4	The configured URL for the fourth application server.
ARCDEFPERS	The person ID used to anonymise records and ensure data integrity when running the delete routine in Archive & Delete.
ARCDELDEF	The retention period in months for which information will be stored in the Delete log for records processed by the delete routine of the Archive & Delete module.
AUDITREADS	An option that controls whether the V4 system audits Capita One users viewing student records.
AUSENEARST	The A&T parameter determines whether the walking network is used to find the starting point for the driving distance (when the nearest link is not drivable). It does not affect the calculation of walking distance.
B2B_S_AGE	Determines the maximum age of records that will be displayed within the v4 B2B: Student search screen.
B2BDATASET	This parameter allows the system administrator to define the default dataset to use for B2B data transfer. NOTE: If the dataset is changed on the B2B Setup tab, this parameter is updated to correspond with that dataset.
B2BHCACHE	This is a True or False (Boolean) parameter and is set to False by default. When set to True, it will enable B2B caching.
BASE_LINKS	People: This is a True or False (Boolean) parameter and is set to False by default. When set to True, it allows other module users within a Local Authority to use the Base Links functionality, where the Personnel module is already licenced. This allows other module users to create an employee record in order to link them to a Base. Where the Personnel module is not in use this setting is ignored and Base Links are enabled.

Parameter Code	Full Description
CAL_METHOD	The default distance calculation method used in Transport v4. Valid values are: • Direct • Driving • Walking. The default value is Direct.
CALC_METHD	The distance calculation method used.
CARER_MIN	The minimum age for which records are displayed in the **Carer** matching area of B2B:Student v4.
CASEVTTYPE	Customisation – Provides the ability to select the CSS Case Note Event Type as a Mandatory field.
CASLINKFIL	Customisation – Case notes linked files were not showing in 3.54 (screens were greyed out). This field enables you to allow access and ability to link files in case notes.
CASNOTEREP	Customisation – Enables you to see the **Reports** link on CSS case notes links menu, to setup reports to be used from this screen.
CASNTLINKD	Customisation – Provides an additional column on the **Case Notes Summary** grid to identify whether any case notes had any linked documents against them.
CASPEPLPRT	Customisation – The **Case Notes People Present** field has been enhanced to allow users to enter up to 2000 characters. A scroll bar is provided to enable you to view all data.
CHAPMINAGE	Chaperone lower age set by LA
CHRONLINKS	Customisation – Provides the ability to see the **Reports** link on the Chronology links menu in order to setup reports for use on the screen.
CHRONOLREP	Customisation – The ability to report on the contents of the Chronology Grid, including any additional bespoke development changes to the grid.
CLOG_VMTHS	Period in months for which contact log records are displayed.
CLOG_VWKS	Period in weeks for which contact log records are displayed.
COMMLOGDSP	Customisation – Provides an additional column to display the **Communication Log Category** in the table of information presented in the communication log screen.
CORDERCONF	One treats court orders as confidential, meaning that only users with access will be able to view information.
CPSCHLOCIN	Hide schools located in list
CPSCHOFFEM	Hide school offer email option
CPWELDRPDN	Hide Welsh drop-down option
CRNLGY_EST	Chronology Establishment filter
CRNTYPFILD	Customisation – Provides the ability to hide the **TYPE** column from the Case Notes and Chronology Summary tables.

Parameter Code	Full Description
CRSEARCH	Controls how the system searches for completed reports in both v4 client and v4 online.
CSSFIELDOV	Customisation – Enables system administrators to override the sign off functionality detailed in 'CSSSIGNOFF' default and re-enable the forms to be edited.
CSSRVWPNL	Generic CSS Reviews panel
CSSSIGNOFF	Customisation – Enables LAs to select the sign off button and lock the form down, thereby stopping anyone from further amending the form unless requesting an override from the system administrator. Available on the Generic Involvements, Activities and Communication logs screens.
CSSWORKFLW	Customisation – Additional workflow functionality available (e.g. ICS Workflow functionality), enabling users to create a workflow and assign it to users or posts with a due date. These Workflows then show up on the user's Homepages. Available on Generic Involvements, Activities and Communications logs screens.
CTACTION	Case wizard from person: action taken
CUST_LAB	Setting Dynamic Label flag: This is a True or False (Boolean) parameter and Is set to False by default. If the system administrator changes the setting to True, then all users will have access to change field and tab labels.
DEST_CRIT	The part of the destination base that distances are calculated to, by default, when performing an assessment in Transport v4. The valid values are: -1: Nearest site -2: Nearest gate -3: Nearest gate or site -4: Nearest gate, if no gate for a site then nearest site -5: Principal site -6: Main gate. The default value is -1.
DXADDR	Data Exchange: This is a True or False (Boolean) parameter and is set to False by default. With this setting, addresses imported with blank postcodes will be accepted.
EDRMSLINKS	Customisation – Bespoke functionality created for LA's using an EDRMS. A button is provided on the Student details screen, enabling a call to a configured EDRMS location. This enables you to display documents held within EDRMS for a particular Student being viewed.
EVTTYPALPH	Customisation – Enables the CSS Case Notes Event Type field to order all information alphabetically for current lookups and any new lookups added.
EY_PP_FULL	Display full Pupil Premium log.
EY30HUPLD	30 hours checks upload

Parameter Code	Full Description
EYC	An EYC parameter is a 'dummy' LA Number for Early Years Settings. If a Local Authority defines this parameter, it allows users of other modules to filter out EY Settings of type Person or Establishment from the Bases lookup. By selecting the LA Bases option, all Bases defined with the Home LA Number are listed. Settings with a dummy LA Numbers are omitted from this list.
FORMATPAON	This is a True or False (Boolean) parameter that enables the Local Authority to format NLPG for Admissions and Transfers ADT files. The default setting is False. A setting of True is recommended for those Local Authorities who will be exporting files to SIMS schools, as this also includes some enhanced address matching. When set to True, One imports/exports entries in the BS7666 format.
FR_APRMORE	Foster Register approved for more column
FR_APRMRCD	Foster Register approved for more code
FR_PLNOTES	Foster Register placement notes column
GIS_HEIGHT	GIS Tile Height
GIS_LEFTX	GIS BBox Bottom LeftX
GIS_LEFTY	GIS BBox Bottom LeftY
GIS_MAXZ	GIS Maximum Zoom
GIS_MINZ	GIS Minimum Zoom
GIS_RIGHTX	GIS BBox Top RightX
GIS_RIGHTY	GIS BBox Top RightY
GIS_SYS_DZ	System Admin Default Zoom
GIS_TPT	GIS Tile Protocol Type
GIS_TSLP	GIS Tile Server Link Pattern
GIS_WIDTH	GIS Tile Width
GNB_STDLMT	The number of records that will be processed in a batch within G&B routines.
GUIDMATCH	This is a True or False (Boolean) parameter and is set to True by default. When set to True, it will allow incoming student / carer records to be matched by GUID where one exists in the import file.
HCC_HFINT	Hants file integration
HIDCRNFILD	Customisation – The ability to hide the **CRN** column from the Case Notes and Chronology Summary tables if the field is not utilised.
ICSFIELDOV	Customisation – The ability to control the permissions ICS Health Professional Field as referred to in default 'ICSINVHEPF'.
ICSINHANS	Inherit answers on Event date

Parameter Code	Full Description
ICSINVHEPF	Customisation – The ICS **Person Details** screen has been amended to include a panel called **Health Professional,** where the LA can add free text information on doctors, dentist, physio etc. This field also includes information on any health professionals and their full details that may be associated to a child.
ICSPERRISK	Customisation – Provides the **Risk** link within the **ICS Person Details** screen.
INACREA	Set default Inactive Reason
INV_FILTER	From day filter in Involvement.
INV_KW_TRV	Involvement key worker tree view
INVDTSTATS	Customisation – Prevents a user from creating an Active Involvement with an end date. Resolves the ability to save an existing Active Involvement with an end date. This ensures users are not able to insert an end date to any Active involvements.
INVLEADCW	The **Lead Caseworker** is created on the **Generic CSS Involvement** form. Turning this on displays a **Lead Caseworker** column on the **Home page | My Involvements**. The default is set to off. To turn on, set the **Value** to **TRUE**.
INVMEDSENS	Customisation – Enables users to filter SEN Medical Needs based on specific Involvement types. This is typically used when a selection of ALL SEN Medical Needs is provided regardless of the form Type for which an involvement is being created. This breaks down the selection based on each form, based on how an LA has set the sections up.
INVOUTPANL	Customisation – The **Outcomes** panel in Generic CSS Involvement forms includes end dates to allow multiple Outcomes of the same type, with different start and end dates.
INVRAGSTS	Enables users to record **RAG Status** (Red, Amber, Green) against Involvements. The default is set to off. To turn on, set the **Value** to **TRUE**. The LA decides its own business rules for each status.
INVRESNPAN	Customisation – The **Reasons** panel in Generic CSS Involvement forms includes end dates to allow multiple **Reasons** of the same type, with different start and end dates.
INVSTATGRP	Enables users to filter involvements by **Group Status** on the **Home page | My Involvements**. The default is set to off. To turn on, the items should be added as a pipe delimited list (separate using the **|** vertical bar character). This also affects the **Service Team Workload** page
KEYETFLTER	Customisation – Enables customised users to perform a Case Notes search on those Case Notes that are selected as Key Events. Where Customisation 'KEYEVTFELD' is also licenced.
KEYEVTFELD	Customisation – Enables customised users to select CSS Case Notes as a Key Event (by means of tick) should a case note need to be recorded as a Key Event.
LEANO	The number of your Local Authority; making it the default entry for all new records. This number links to the One Licence files and is entered when the system is installed. This number should not be changed.
LINKCASCHR	Customisation – Enables users to add and view linked documents for a Case Note in view only mode in the Case Note Summary screen.

Parameter Code	Full Description
LINKFILCOL	Customisation – A linked document column has been added to the Chronology grid showing all records that may have documents linked to them.
LNK_D_FLTR	Defines the file types that are permitted for selection as a linked document within the v4 Client and v4 Online.
LOCALE	Locale Setting for Tab and Labels where parameter values are currently 1 as the Default Setting, 2 Scotland, 3 Wales and 4 Northern Ireland Locale settings.
LOOKED_AFT	Students: This is a True or False (Boolean) parameter and is set to False by default. If this parameter is set to True, then the Public Care button on the Student Details tab page will always read Public Care Status, giving no indication to users of the actual status. If this is set to False, then the button indicates the current status, (i.e. "Not in Public Care", "Currently in Public Care" or "Formerly in Public Care"). Users with access rights to this information can still view the Public Care details.
MAXGOVAPPT	Governors: This is the maximum number of concurrent appointments within an authority.
MYINVSPLIT	Enables users to activate the Split grid on the **Home page | My Involvements**. The default is set to off. To turn on, set the **Value** to **TRUE**. This also affects the **Service Team Workload** page.
NCY_1	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within Guardians \ Carers people search.
NCY_110	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within B2B: Personnel people search.
NCY_13	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within v3 Online School Trips people search.
NCY_15	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within Early Years people search.
NCY_17	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within Governors people search.
NCY_19	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within Training Manager people search.
NCY_2	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within v3 People Roles \ v4 Role Manager people search.
NCY_21	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within v3 Personnel people search.
NCY_26	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within System Administration (mapped person) people search.
NCY_27	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within Transport people search.
NCY_32	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within EPM v3 people search.
NCY_33	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within CSS people search.

Parameter Code	Full Description
NCY_40	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within CIE people search.
NCY_43	The NCY value (+4 to calculate age), used to reduce the age of people being displayed within Music Tuition people search.
NE_SC_CRIT	The part of the destination base that distances are calculated to, by default, when running the Nearest School search in Transport v4. Valid values are: 1: Nearest site 2: Nearest gate 3: Nearest gate or site 4: Nearest gate, if no gate for a site then nearest site 5: Principal site 6: Main gate. The default value is 1.
NEAR_POINT	The value used to determine the nearest point of a base for A&T distance calculations.
NO_OF_BASE	Bases returned in number format.
NO_OF_NESC	The default number of schools returned by the Nearest School check that is automatically performed when you run an assessment in Transport v4. The default value is 5. N.B. Setting the NO_OF_NESC parameter to a value greater than 10 may have a negative impact on search performance.
NWENTCHILD	Customisation – The Chronology grid has been amended to display a child’s birthday as a new event, up to their 26th birthday. This allows users to view certain events between a child’s birthdays and easily identify when these occurred. N.B. Setting the NO_OF_NESC parameter to a value greater than 10 may have a negative impact on search performance.
ORDDRIVING	When calculating driving distance, include ‘Off Road Distance’.
ORDWALKING	When calculating walking distance, include ‘Off Road Distance’.
PER_ROLES	Search for people based on Personnel module roles.
PERSTUDHAZ	Customisation – Provides the **Hazard** link within the **Links** menu on the Student and Person details.
PERSTUDHC	Customisation – A Health Care available from the Focus Menu allowing an LA to add Health Centre\GP information and search and filter on this for any students or person record on the system.
PERSTUDNHS	Customisation – Provides the ability to record the NHS number prior to being added into the main product.
PORTAL_PDF	Portal – allow PDF generation
POSTCODE	Data Exchange: This is a True or False (Boolean) parameter and is set to False by default. With this setting, addresses imported with blank postcodes are accepted.
PPREPORTS	Provider Portal show reporting

Parameter Code	Full Description
PS_LEVEL	This parameter controls what personal information fields are visible by all users via One Online. There are three levels: Full: All "Person Details" available Online. Core: Default setting at installation time - as Full except DoB, NI No., Ethnic Origin, Home Language, Reg Disabled and Disability Number. Core_No_Address: Suppresses same as Core but also suppresses the Post Code, the full address and Home telephone number.
PWD_EXP_HR	Forgot password link expiration in hours
S_NWV3CONF	Displays a v3 confidential CSS Service on the v4 Social Network.
SELEDESELE	Customisation – Options **Select All** and **Deselect All** available on the Chronology grid for Case Notes that appear to be Key Events. Works in conjunction with reporting, allowing users to quickly report on Key Event Case notes.
SEN_ADMIN	The default SEN Administrator.
SENTYPE	Sets the default Bases SEN School Type.
SERWKLDARF	Customisation – Default is related to default 'SERWORKCNT' for Service Team Workload customisation.
SERWORKCNT	Customisation – Within the **Service Team Workload**, screen a total figure is displayed of how many involvements are open for any given service team or person within that service team. This provides users with a summary of currently open involvements.
SPACTION	Case wizard from person: supervised action
SPPOST	Case wizard from person: supervised post
STUD_LEA	The single LA field in Student Details is replaced with Home and Funding LA fields. When One is updated, both fields will initially contain the original LA No/Name. For reporting purposes, this parameter (HOME or FUND) is used to allow the Local Authority to switch which of the two new fields will appear in any reports using the LA No data. The Address Utility, Update Student LA No routine uses this parameter to update the Student details record for Home and Funding LAs.
SVCTMCSSRW	Generic Reviews Service Team
SWCEXPPATH	The path used to export the file from SWRC routine.
TASSNOHS	The number of schools to be assessed when performing a nearest school search. A higher value provides more confidence that the schools returned are accurate (i.e. all possible schools are considered and ranked), but the cost is decreased performance. A lower value will increase performance but risks not properly identifying the actual nearest school.
TASSNTHSCH	Default number of schools returned by the Nearest School search in the Transport v4 module. The default value is 5. N.B. Setting the TASSNTHSCH parameter to a value greater than 10 may have a negative impact on search performance.
TITLE_LINK	False – Title values can be added on the fly. True – Only Title lookup values can be selected.

Parameter Code	Full Description
TR_ASS_NET	Transport assessment preferred route
TR_LIF_DRI	Transport LIF driving network
TR_LIF_WAL	Transport LIF walking network
TR_OWN_NET	Transport journey own travel distance
TRS_CNT	Transport: This is a True or False (Boolean) parameter and is set to True by default. When set to True, it enables you to edit closed contract details.
TRS_VAT_PC	Transport: This sets the current VAT rate for automatic calculations, but enables you to edit the percentage when necessary.
TRS_YRCLOS	Transport: The date set is used as a criterion for selecting students for transfer to next year.
TUSENEARST	The Transport parameter determines whether the walking network is used to find the starting point for the driving distance (when the nearest link is not drivable). It does not affect the calculation of walking distance.
UDFMANDAT	Customisation – Provides the ability to select any UDF fields created to be a mandatory field.
UDFPANMAN	Customisation – Allows users to add additional panels to areas of the system (if the screen \ entity is within the dropdown menu of the UDF manager screen) and assign UDFs to these panels.
UDFTEXTEXT	Customisation – Increases the text limitation within UDFs from current system limit to 2000.
V3REFSUM	Customisation –v3 Referral Summary – Contact RSM \ BDM for further detail.

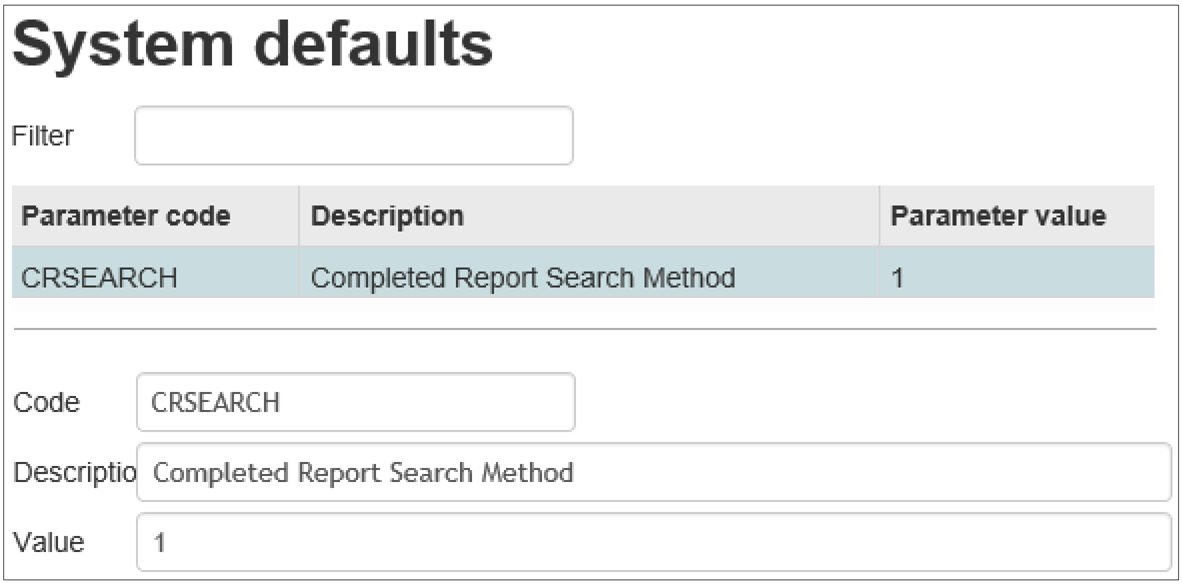
Completed Reports Defaults

From 3.74 onwards, there is a change to the completed reports functionality. This is due to the performance issues experienced by OneCloud customers.

The **CRSEARCH** default parameter controls how the system searches for completed reports in both v4 client and v4 online.

OneCloud customers may experience issues of the report server taking too long to scan the completed reports folder. In this case they can change the functionality to store the xml meta data information in a table called REPORT_COMPLETED. The physical location of the completed report is also stored in the table although the report itself will still reside on the report server.

On premise customers should be unaffected by the performance issues and can leave the setting at the default value.

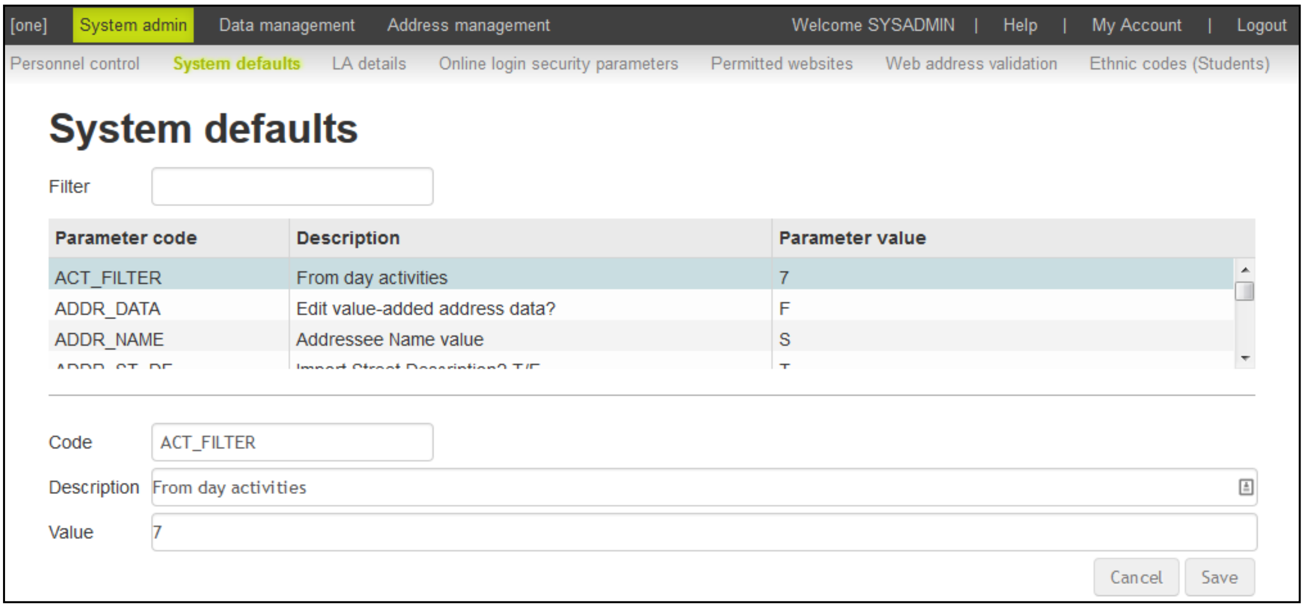


Parameter Value	Description
1	Use existing functionality. This is the default option. • searches use directory scan • new reports create xml meta data file only
2	Populate the database. • report server will run utility to populate database from xml meta data files • once complete, default parameter changed to 3 • **IISRESET required** * • reports completed lists populated from database * IISRESET will kick users off the system so is best run out of hours
3	Database search. • database population is complete • searches use database • new reports will create xml meta data files and populate the database This is the recommended setting for OneCloud users.

Editing System Defaults

To edit a system default value:

1. In the **System admin** area, select the **System defaults** page to display a list of system default parameters. For information on accessing the System Administration v4 site, see [Accessing the System Administration v4 Site](#) on page *6.*



2. In the list, select the parameter you want to edit. If required, you can filter the list by entering any known characters or numbers in the **Parameter code**, **Description** or **Parameter value** columns.
3. Edit the **Description** or **Value** as required.
4. Click the **Save** button to update the parameter values.

05 | Editing LA Details

Introduction

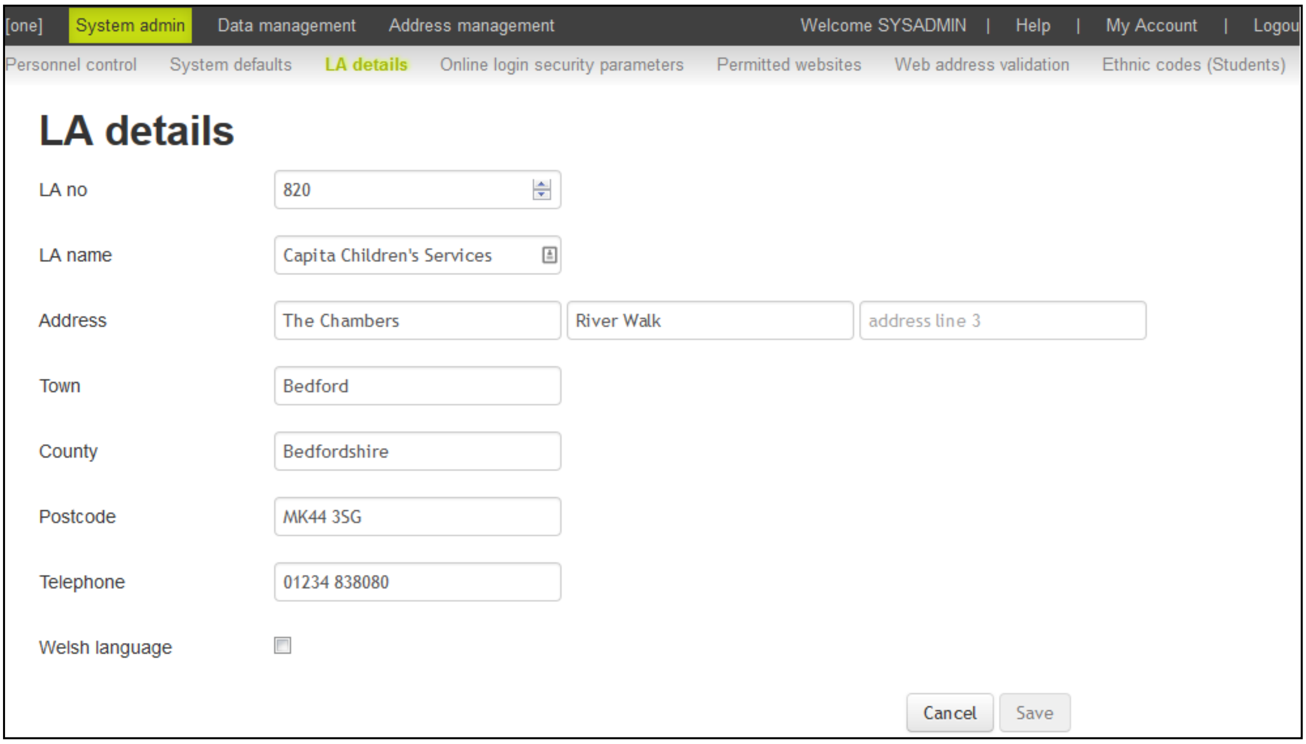
The **LA Details** page enables a system administrator to record LA specific details, including contact information and language preferences (English or Welsh).

Most of the fields are self-explanatory. However, the **LA no** field is read-only and displays the LA number recorded in the LEANO parameter on the **System defaults** page. The **Welsh Language** check box indicates the language in which most lessons are conducted within the authority's schools. Leaving the check box deselected indicates that most lessons are conducted in English. Selecting the check box indicates that most lessons are taught in Welsh.

Editing LA Details

To edit an LA details value:

1. In the **System admin** area, select the **LA details** page to display the contact information for the LA. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6*.



2. Edit the fields as required.
3. If required, select the **Welsh language** check box to indicate that most lessons in the LA are taught in Welsh.
4. Click the **Save** button.

06 | Editing Online Login Security Parameters

Introduction to Online Login Security Parameters

The **Online login security parameters** page enables system administrators to configure parameters to enhance the security of online elements of the One environment, e.g. A&T Online, Provider Portals and Citizen Portals.

> ***NOTE:***
>
> *The **Login type** field is read only. Although it is set to 'ANTPUBLIC', the settings entered in the rest of the page affect all public facing portals within the One product.*

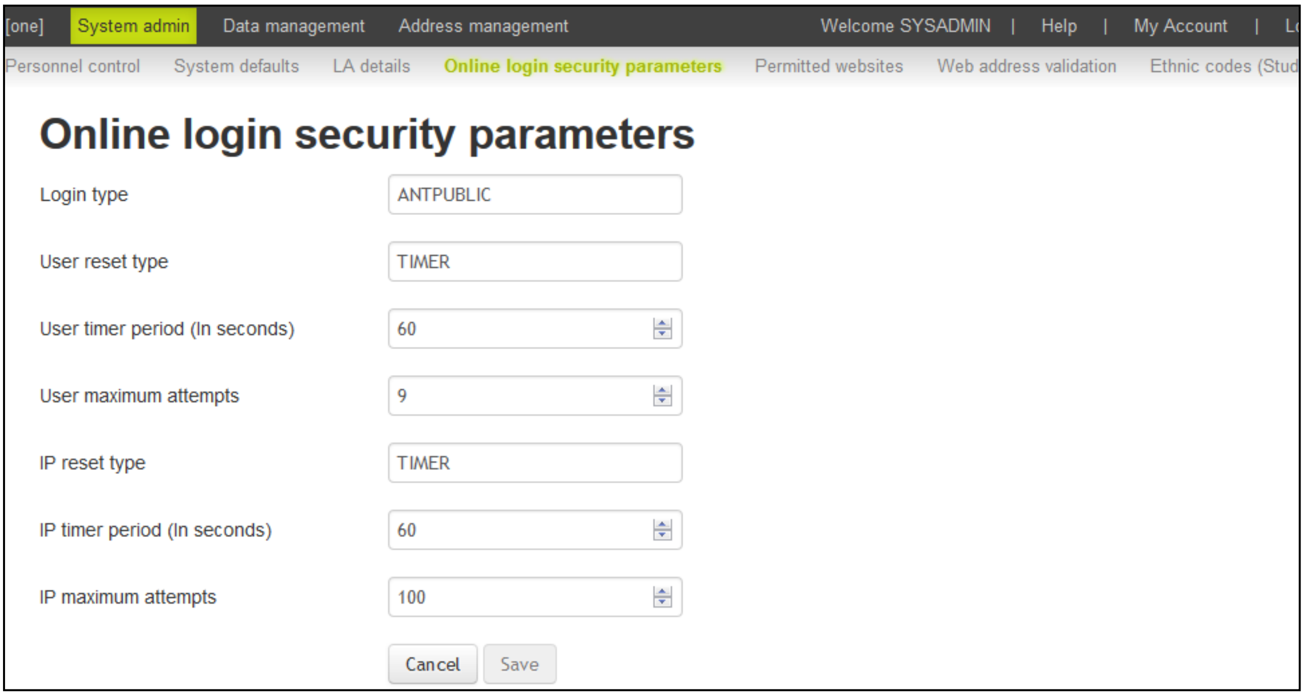
The following parameters can be configured:

Parameter	Description
Login type	Read-only; displays the name of the selected type.
User reset type	Manual or Timer. If **Timer** is selected, then a value must be entered in the **User timer period (in seconds)** field.
User timer period (in seconds)	This is defined in seconds and is the period of time that will elapse before the system is automatically reset. The user can attempt to login again after this period has elapsed. Period range allowed is 3-99999.
User maximum attempts	This is the number of failed login attempts for each user name before the system locks them out. The range allowed is 1-999.
IP reset type	Manual or Timer. If **Timer** is selected an **IP Timer Period** must be defined.
IP timer period (in seconds)	This is defined in seconds and is the period of time that will elapse before the system is automatically reset. The user can attempt to login again after this period has elapsed. Period range allowed is 3-99999.
IP Maximum Attempts	This is the number of failed login attempts for a user for each IP address before the system locks them out. The range allowed is 1-999.

Editing Online Login Security Parameters

To edit online login security parameters:

1. In the **System admin** area, select the **Online login security parameters** page to display a list of security parameters. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6.*



2. Edit the parameters as required. For a full description of the parameters, see Introduction to Online Login Security Parameters on page *22.*

> ***NOTE:***
>
> *The **Login type** field is read-only. Although it is set to 'ANTPUBLIC', the settings entered in the rest of the page affect all public facing portals within the One product.*

3. Click the **Save** button.

07 | Managing Permitted Websites

Introduction to Permitted Websites

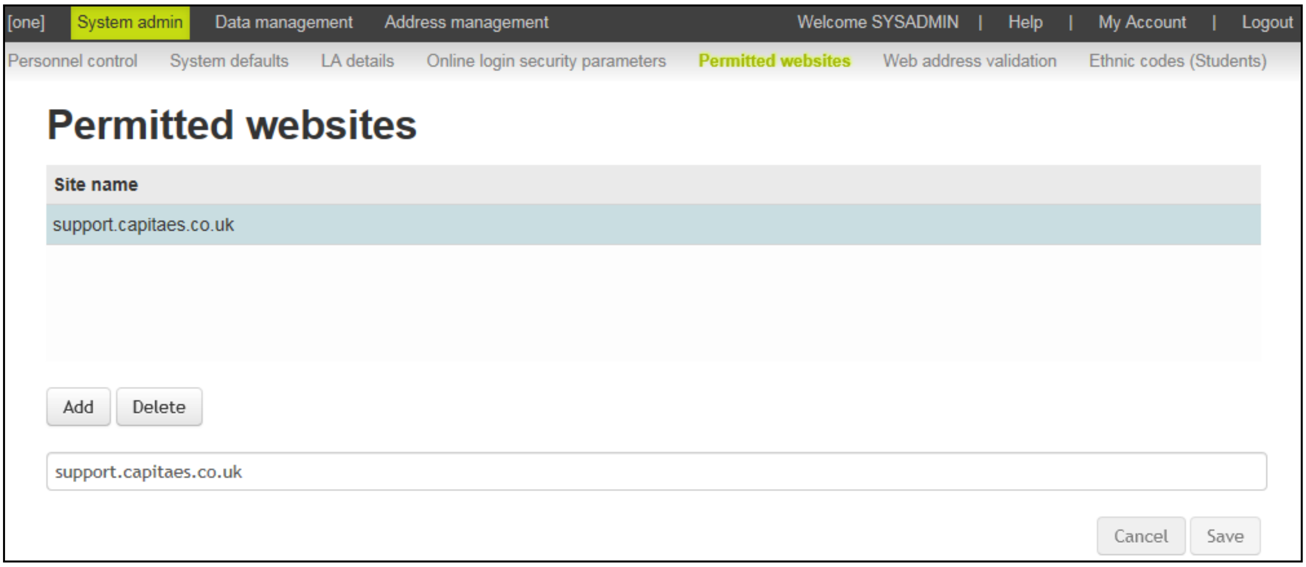
The **Permitted websites** page enables a system administrator to specify a list of trusted websites. Once added, these websites are allowed as valid data entries in fields found in the online Admissions and Entries applications provided by Capita for Local Authorities. Websites not in the list will be rejected.

The functionality provides an extra layer of security in preserving the confidentiality of data that is entered by parents or guardians who choose to make applications online.

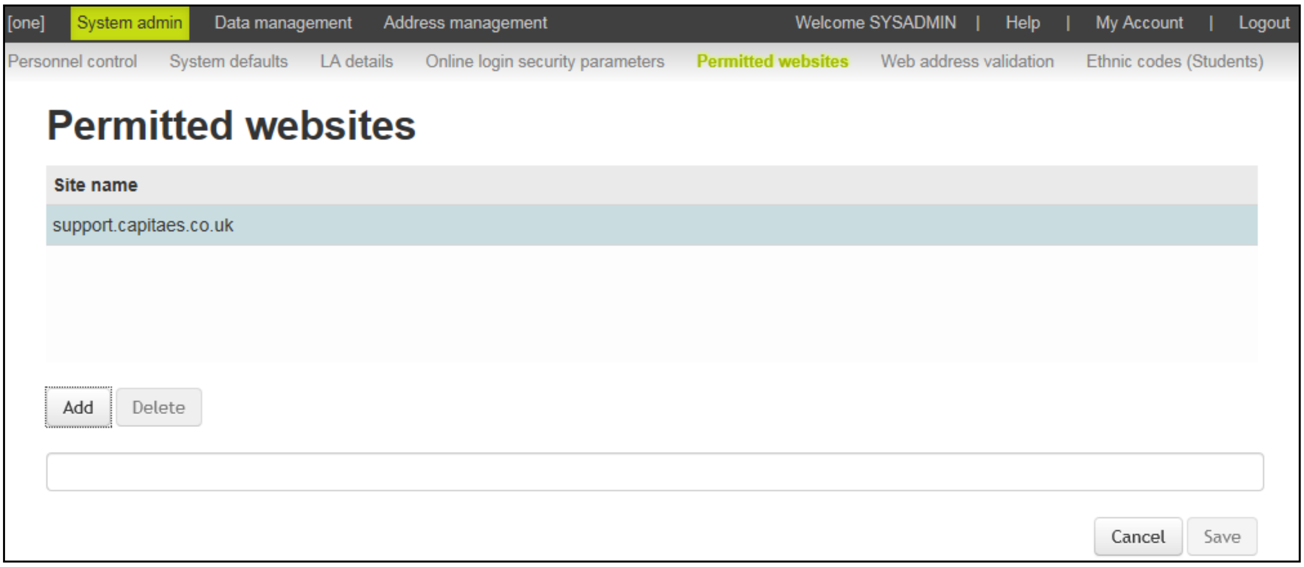
Adding a Permitted Website

To add a permitted website:

1. In the **System admin** area, select the **Permitted websites** page to display a list approved sites. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6.*



2. Click the **Add** button.

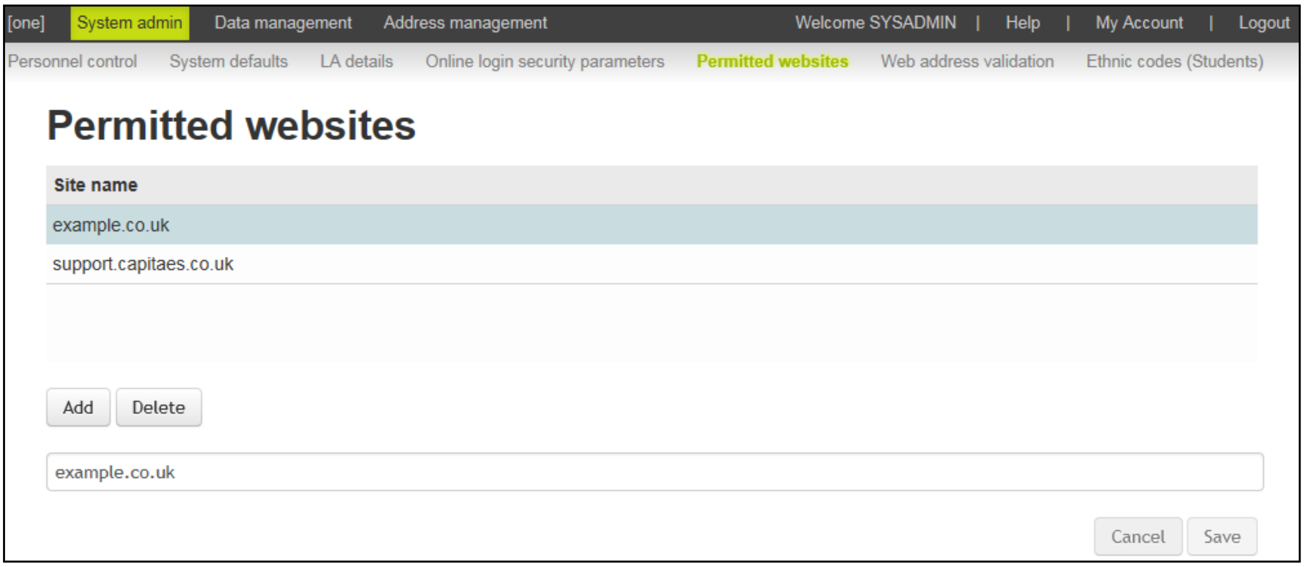


3. Enter the required web address into the field below the **Add** button. You do not need to include https:// or http:// when entering the website address.
4. Click the **Save** button.

Editing an Existing Website

To update an existing website address in the list:

1. In the **System admin** area, select the **Permitted websites** page to display a list of approved sites. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6*.



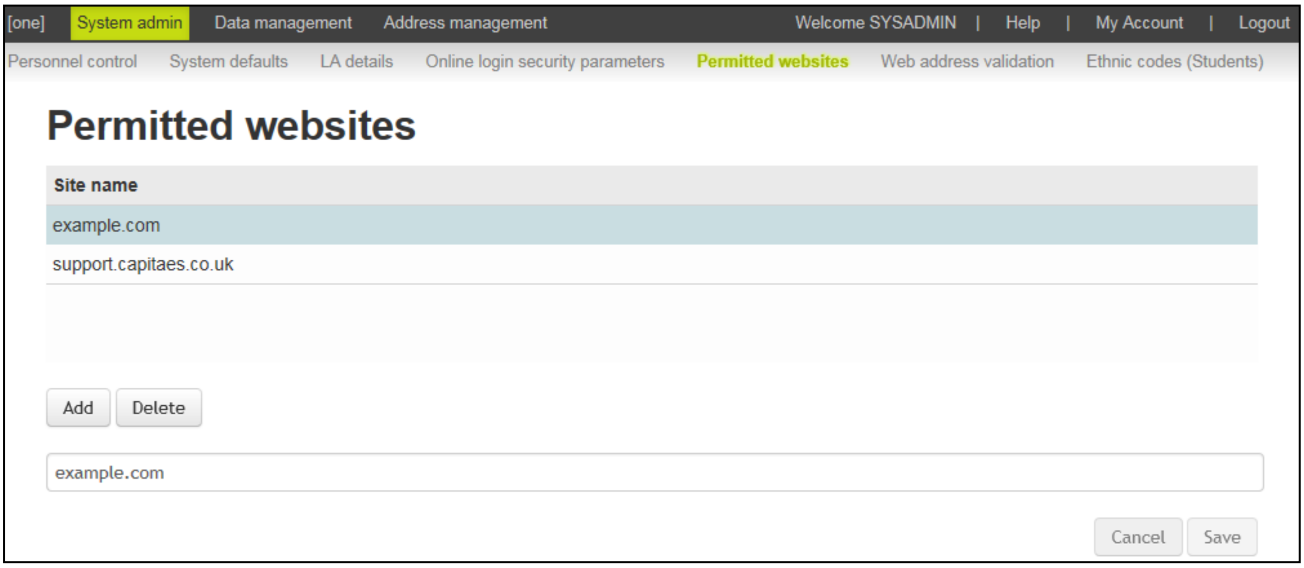
2. In the list, select the website you want to edit. The address is displayed in the field below the **Add** button.
3. Edit the address as required.
4. Click the **Save** button.

Deleting a Permitted Website

If a website is no longer trusted and should not be allowed to be entered into an online application, you can delete the site entirely from the list.

To delete an item from the permitted website list:

1. In the **System admin** area, select the **Permitted websites** page to display a list of approved sites. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6.*



2. In the list of permitted websites, select the website you want to delete.
3. Verify the website you want to delete is displayed in the field below the **Add and Delete** buttons.
4. Click the **Delete** button to display the **Confirmation** dialog.
5. Click the **OK** button to delete the website entry.

08 | Configuring Web Validation

Introduction to Web Validation Setup

The **Web validation setup** page enables a system administrator to configure the One environment to communicate with SIMS environments at schools that are configured to validate addresses with the LA.

IMPORTANT NOTE:

To successfully implement the web validation functionality, you must ensure that all parts of the One and SIMS environments are configured properly. This chapter includes information related to the configuration settings within the One System Administration v4 site only. For more information, refer to the Web Address Validation Setup *technical guide, available from the [One Publications](#) website.*

Service Setup Options

The **Service setup** panel enables system administrators to control whether the service is operational, whether any logging is stored and which filtering should be applied to the addresses before the service uses them for matching a request.

The **WAV service setup** section controls whether the service is running and if logging is enabled. The following options are configurable in the **WAV service setup** section:

Field	Description
Service active	If selected, the Web Address Validation service responds to requests. If deselected, the service does not respond to requests.
Activity logging	If selected, the Web Address Validation service creates activity log entries in the wav_activtiylog table.

NOTE:

In the v3 Client, the dataset had to be selected manually. This is no longer required, as One populates the dataset automatically.

The **Addresses Presented** section defines the filters that are applied to addresses within One prior to any matching of a validation request. The following filtering options are available:

Field	Description
All addresses	One tries to match the supplied information to all the addresses in the One address tables.
Selected address where	When selected, only a subset of the addresses in the address tables is used for matching by the address validation web service. If selected, at least one check box must also be selected.
UPRN exists	Selects all addresses where the UPRN field is not null
OSAPR exists	Selects all addresses where the OSAPR field is not null.
Easting/Northing exists	Selects all addresses where the Easting and the Northing fields are not null.

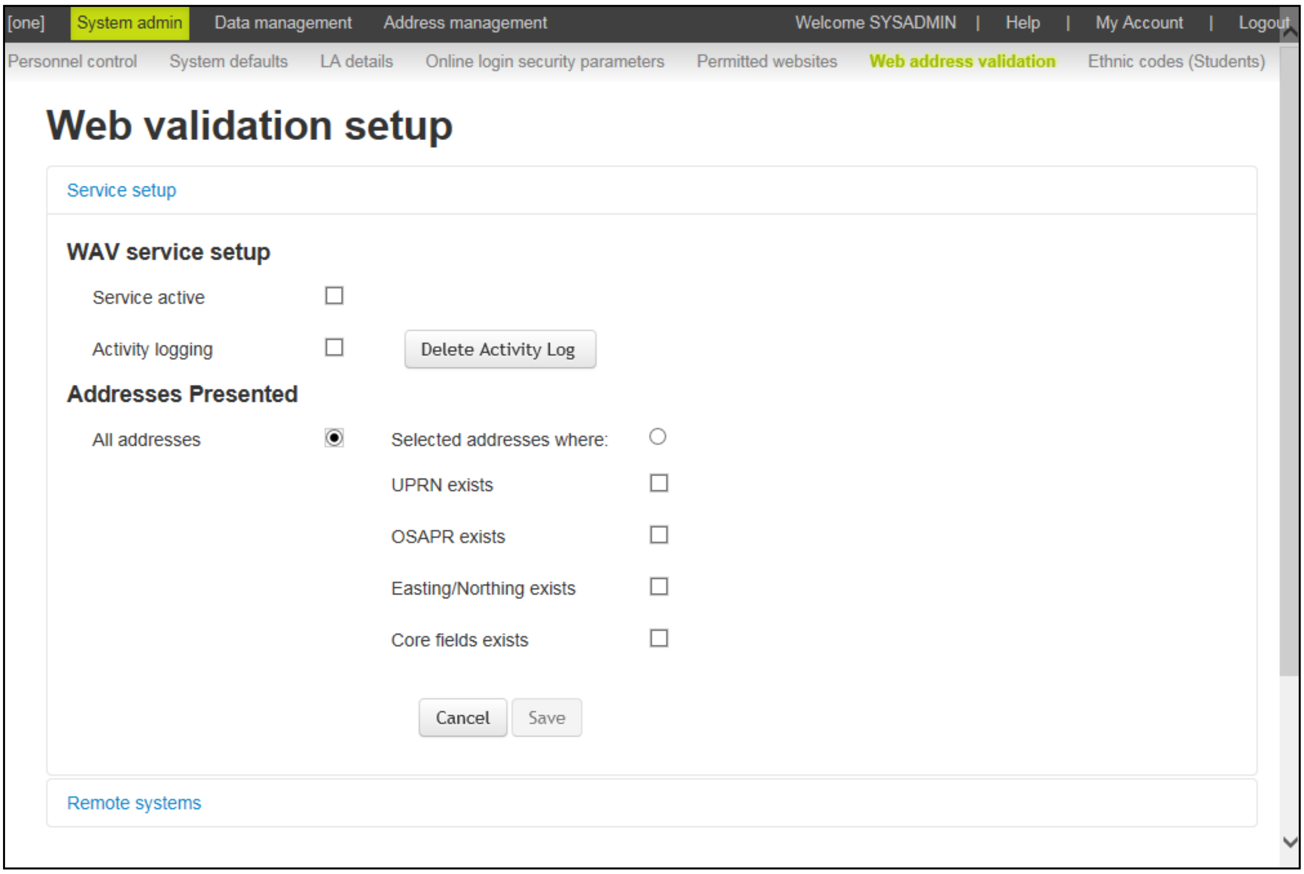
Field	Description
Core fields exists	Selects all addresses where: ■ one of house_name or apartment or house_no is not null and ■ address1 is not null and ■ postcode is not null.

Configuring the Web Validation Service

The options in the **Service setup** panel affect the way that the service operates and applies to all remote systems.

To configure the system web validation service settings:

1. In the **System admin** area, select the **Web address validation** page. If required, click the **Service setup** hyperlink to display the service options. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6.*



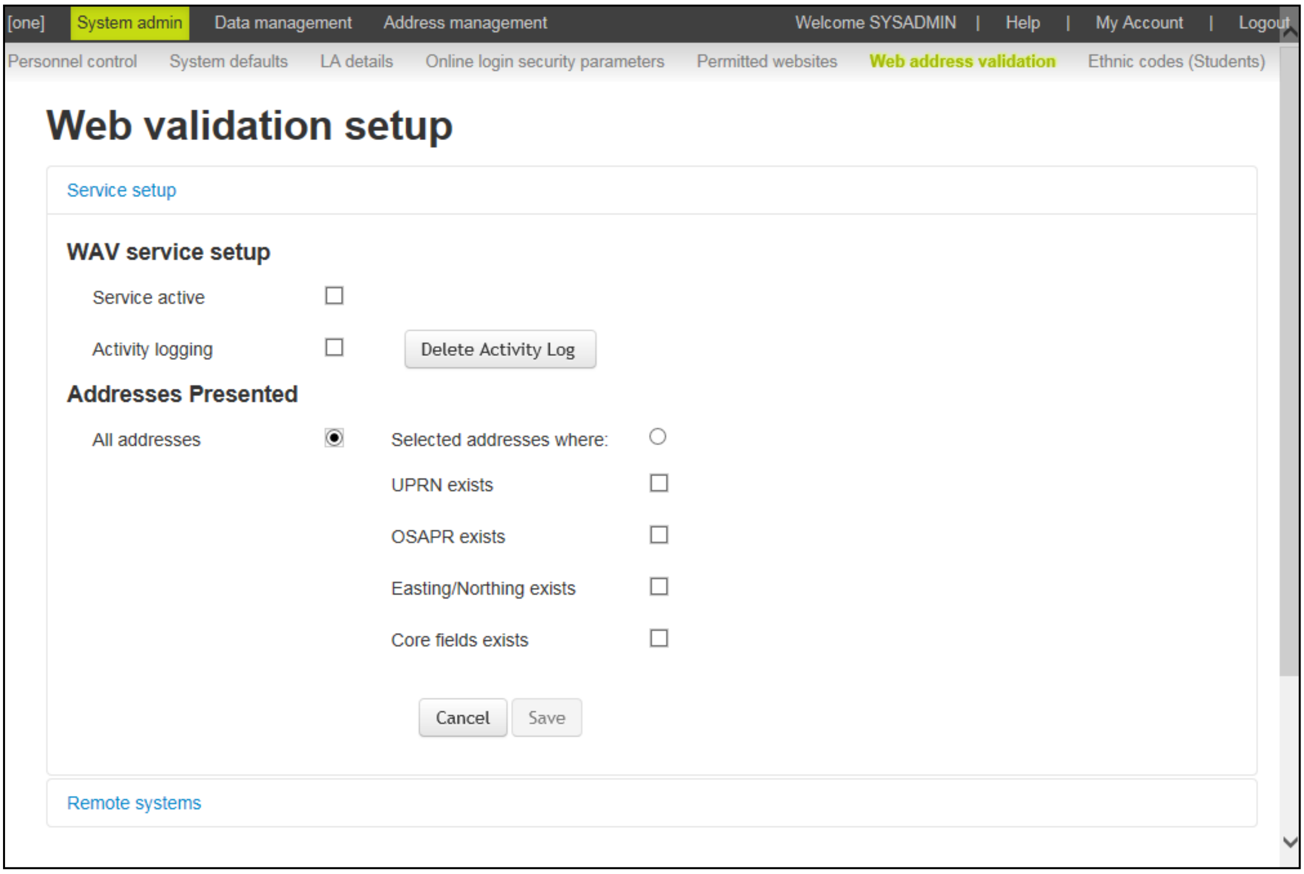
2. Select the options for logging and for the address filters. For more information on each option, see Service Setup Options on page *27*.
3. Click the **Save** button to save the configuration.

Deleting the Web Address Validation Activity Log

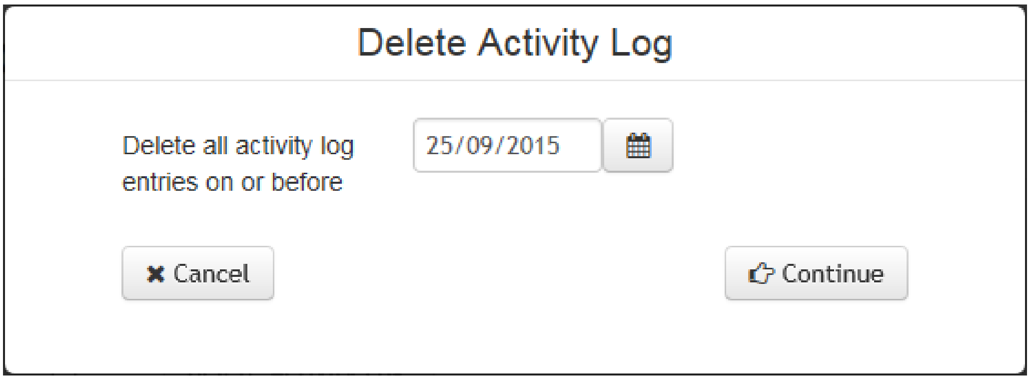
Logging web address validation activity can be useful for diagnosing issues that might arise with the service. However, if the logs are no longer required, they can be deleted.

To delete the web validation activity logs:

1. In the **System admin** area, select the **Web address validation** page. If required, click the **Service setup** hyperlink to display the service options. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6.*



2. Click the **Delete Activity Log** button to display the **Delete Activity Log** dialog.



3. Select the required date from the calendar. All entries on or before the selected date will be deleted.
4. Click the **Continue** button to display the **Information** dialog.
5. Click the **OK** button to close the dialog and return to the **Web validation setup** page.

Remote Systems Options

The **Remote systems** panel enables system administrators to specify the SIMS systems that can use the Web Address Validation service.

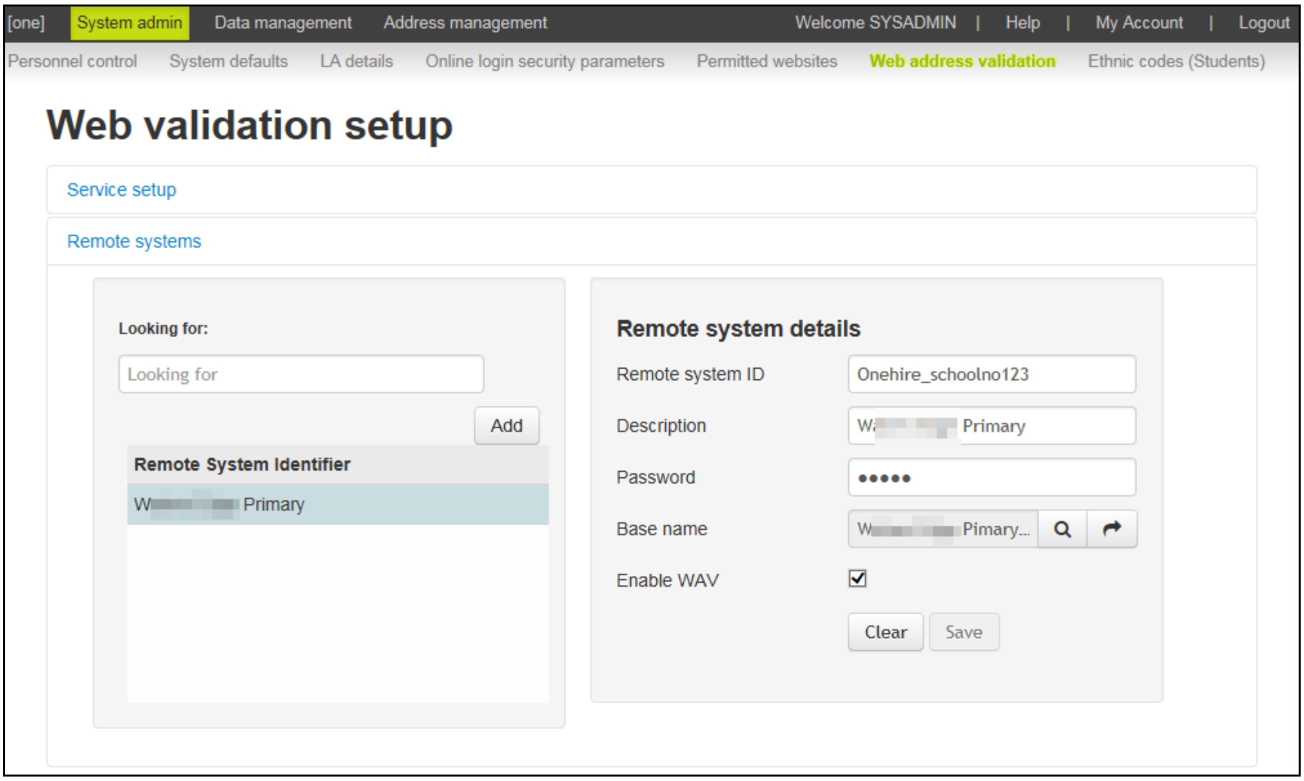
Field	Description
Remote system ID	An identifier created by the Local Authority and passed to the schools for them to enter into their SIMS system. The **Remote system ID** is the Capita One user account name.
Description	A description of the school/organisation that owns the remote system specified in the **Remote system ID**.
Password	Created by the local authority and passed to the schools for them to enter into their SIMS system.
Base name	For informational purposes only. A system administrator can select a school name associated with the **Remote system ID**, particularly where the ID is not indicative of the school name.
Enable WAV	Select to enable WAV for the remote system.

Adding Remote Systems

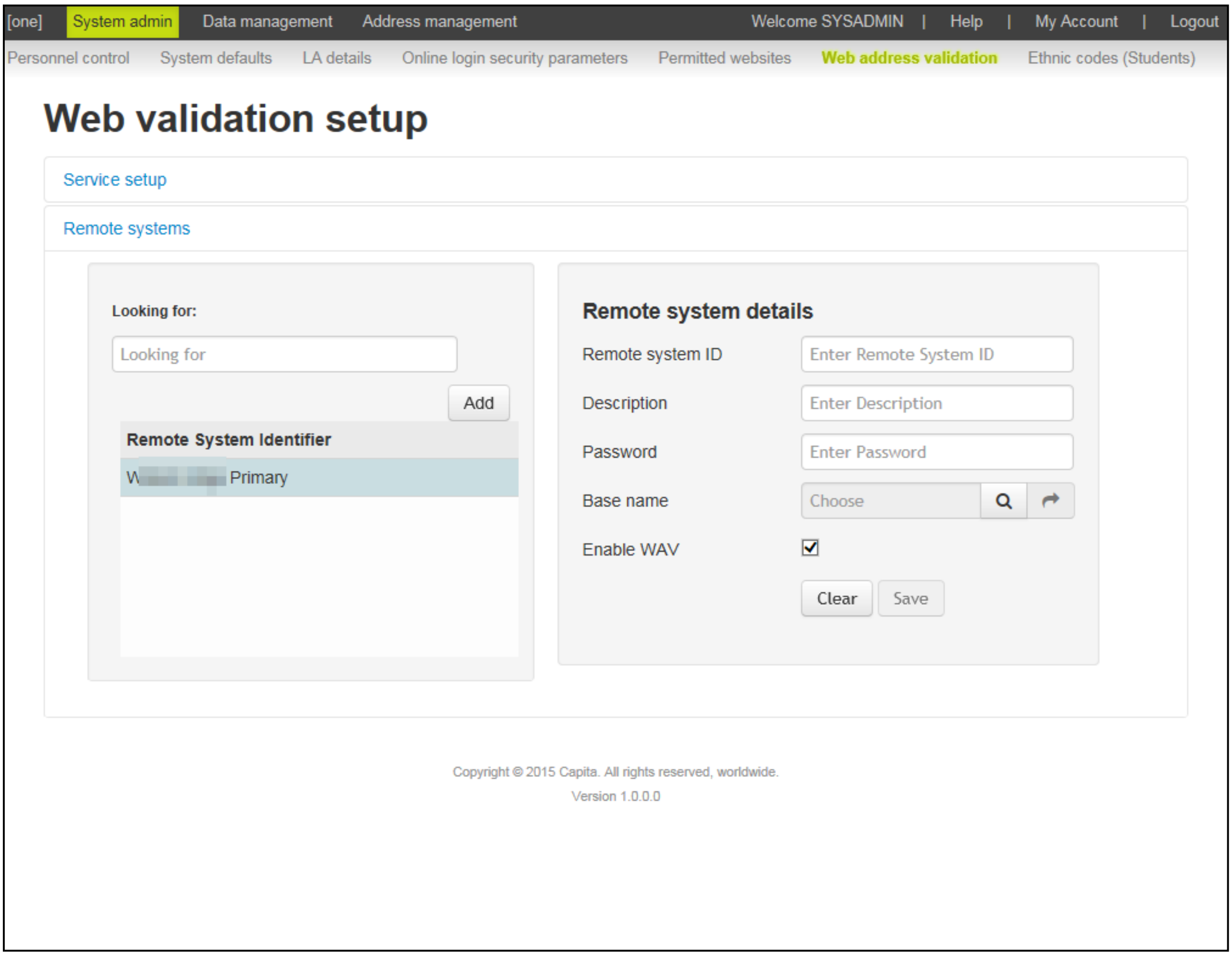
To enable communication between One and a remote system, the remote system must be added via the **Remote systems** panel. Once a remote system has been added, it cannot be removed from the One system, although web validation can be deactivated for the remote system.

To add a remote system:

1. In the **System admin** area, select the **Web address validation** page. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6.*
2. Click the **Remote systems** hyperlink to display a list of schools configured to access One.

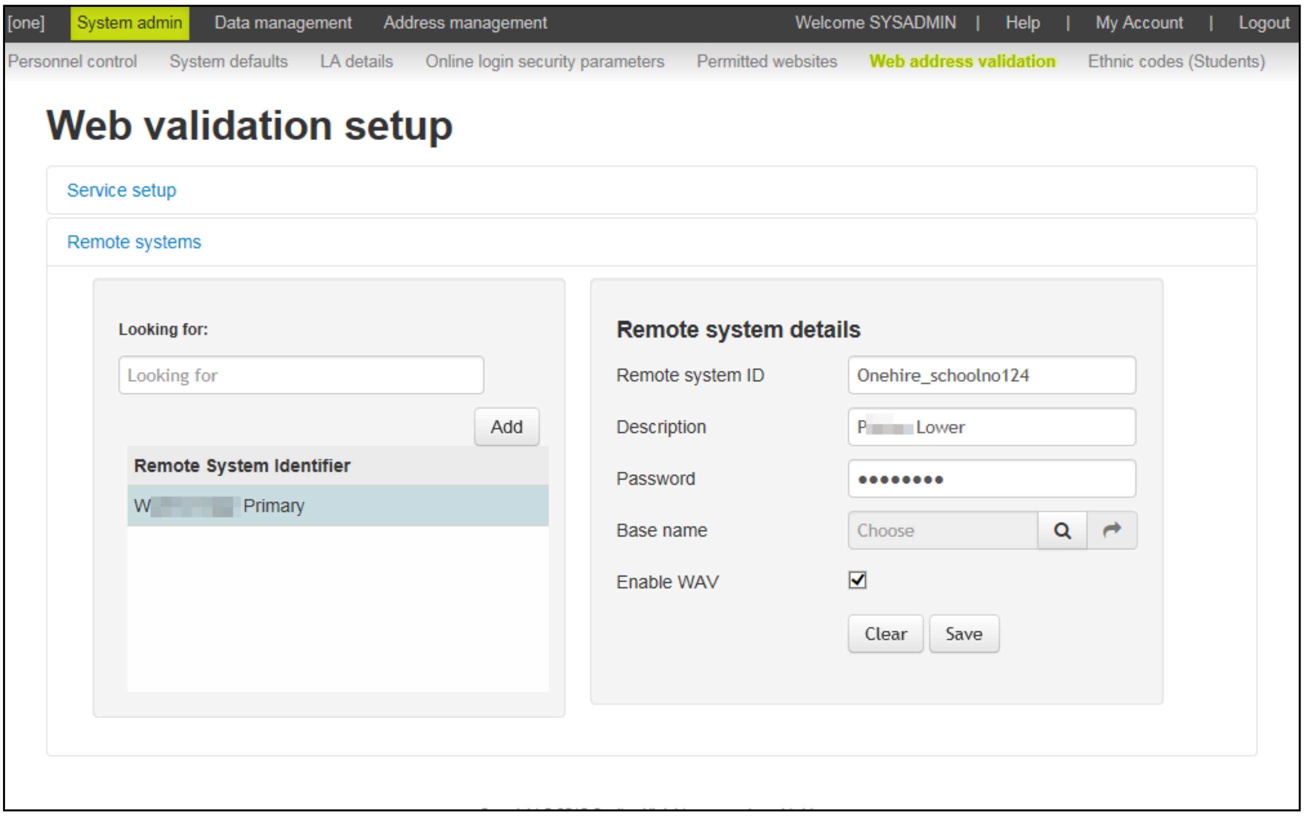


3. In the left-hand panel, click the **Add** button to display a blank set of **Remote system details**.



4. Enter the **Remote system ID** (Capita One user name), **Description** and **Password** (Capita One user password) details.

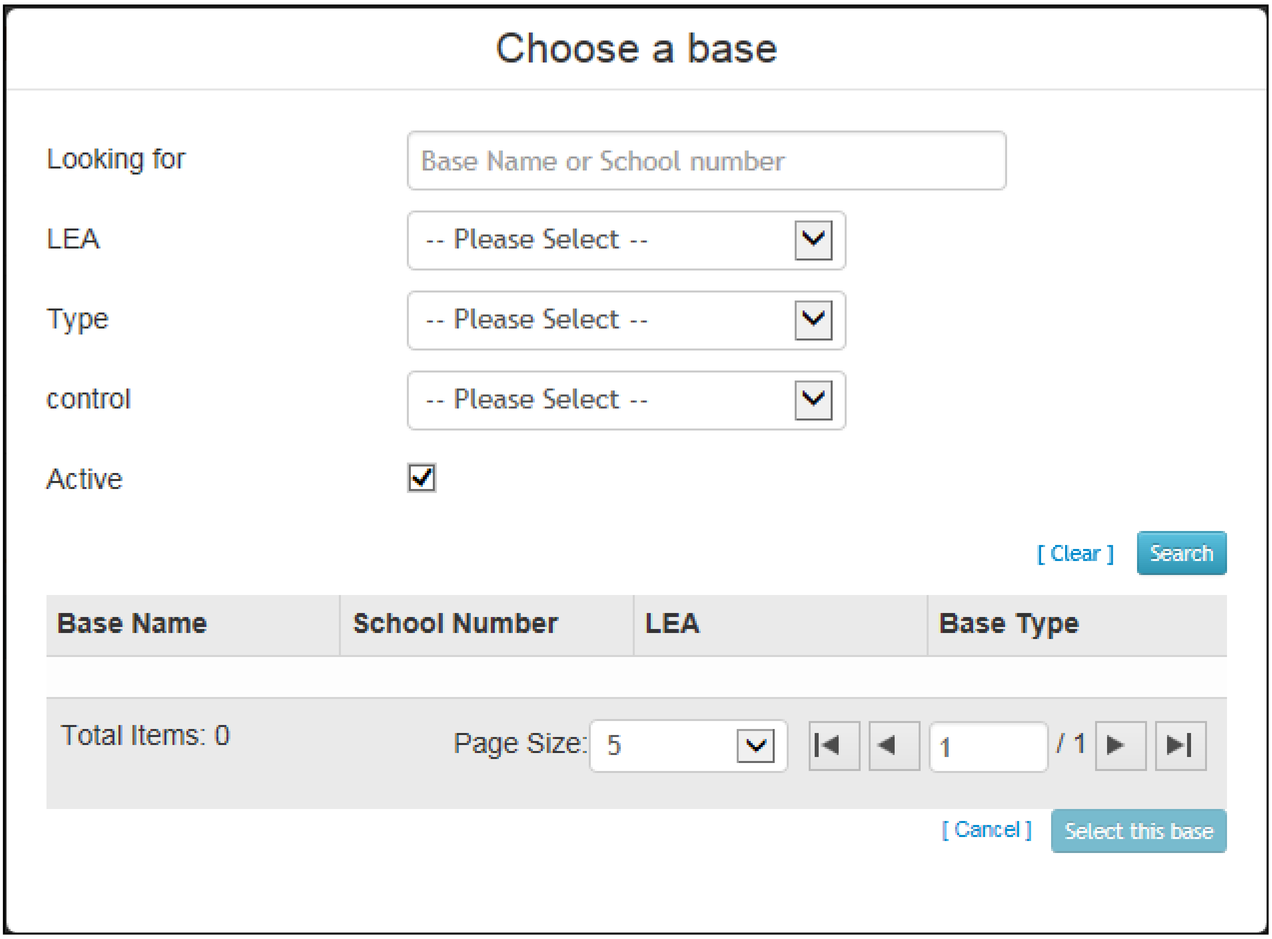
> ***IMPORTANT NOTE:***
>
> *You must ensure that the **Remote system ID** and **Password** information is provided to each school so that they can configure their SIMS environments.*



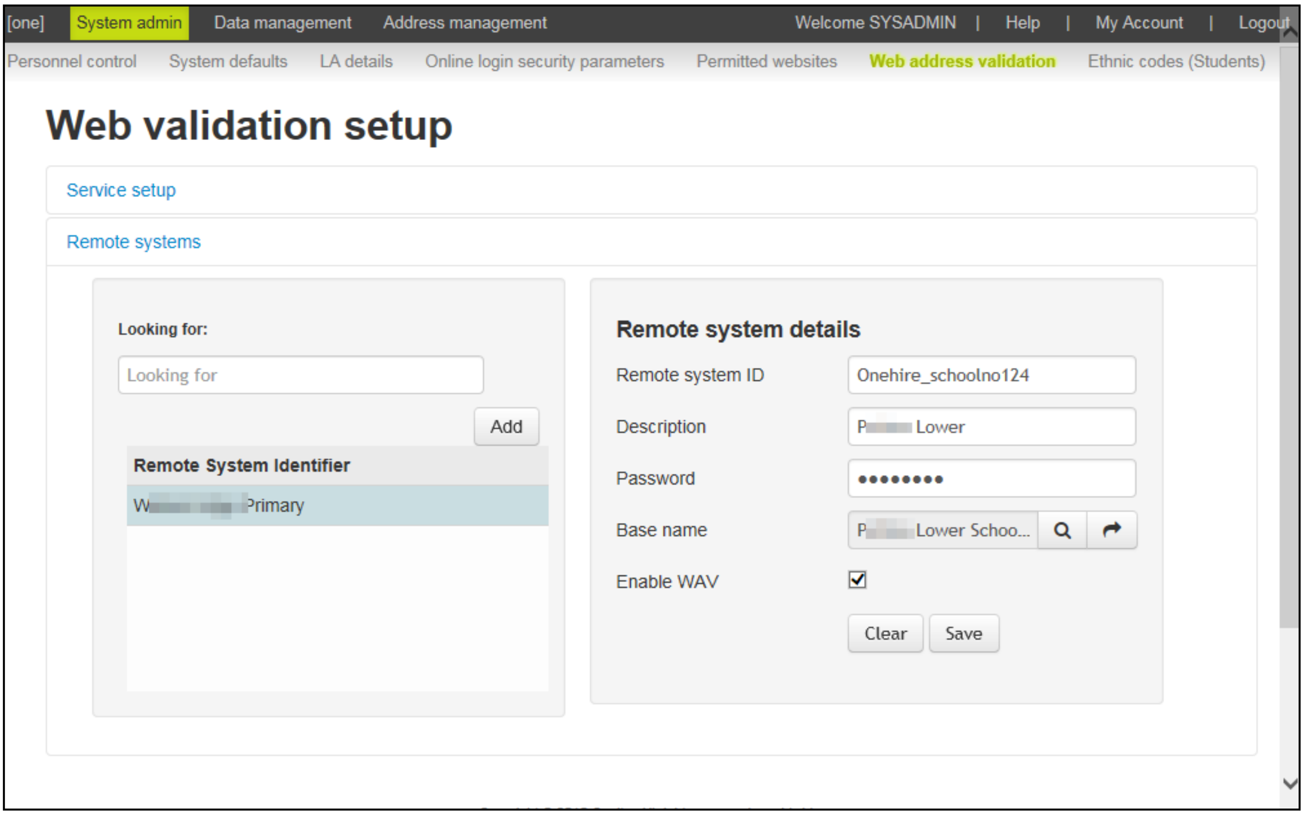
5. If required, add a **Base name**:

> ***NOTE:***
>
> *The **Base Name** field is for information only. It enables the system administrator to select a school name associated with the Remote System ID, particularly where the ID is not indicative of the school name.*

   a. Click the magnifying glass icon in the **Base** name field to display the **Choose a base** dialog.



b. Enter or select the search criteria for the required base.
c. Click the **Search** button to display a list of bases that meet your search criteria.
d. In the list of returned bases, select the required base.
e. Click the **Select this base** button to add the base to the remote system record.



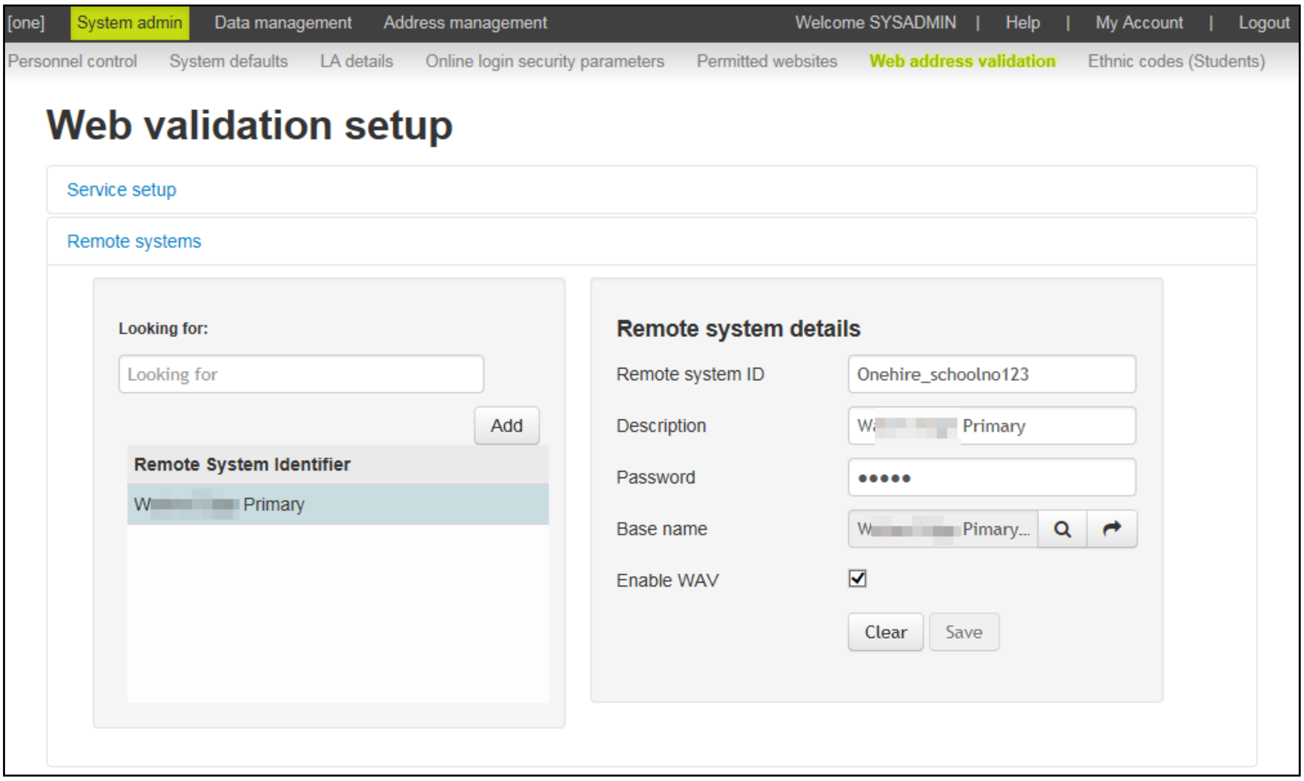
6. If you do <u>not</u> want the remote system to be active immediately, deselect the **Enable WAV** check box.
7. Click the **Save** button to record the remote system details.

Deactivating a Remote System

Once a remote system has been added to the Web validation setup page, it cannot be removed. However, a system administrator can deactivate a remote system so that it no longer can communicate with the One system.

To deactivate a remote system:

1. In the **System admin** area, select the **Web address validation** page. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6*.
2. Click the **Remote systems** hyperlink to display a list of schools configured to access One.



3. Select the remote system you want to deactivate.
4. In the **Remote system details** panel, deselect the **Enable WAV** check box.
5. Click the **Save** button to record the change.

09 | Managing Ethnic Codes

Introduction to Ethnic Codes

The **Ethnic codes** page enables system administrators to select the DCSF Common Basic Dataset (CBDS) codes to be used by the Local Authority. The Local Authority must issue this information to all schools within the Local Authority.

The CBDS codes are split into Main Codes (MC), Extended Codes (EC), Sub-Extended Codes (SC) and Other Codes (OC), displayed in hierarchical format. There are different sets of codes for England, Scotland and Wales.

The ethnic codes are listed in browse format. The following information is displayed in the list.

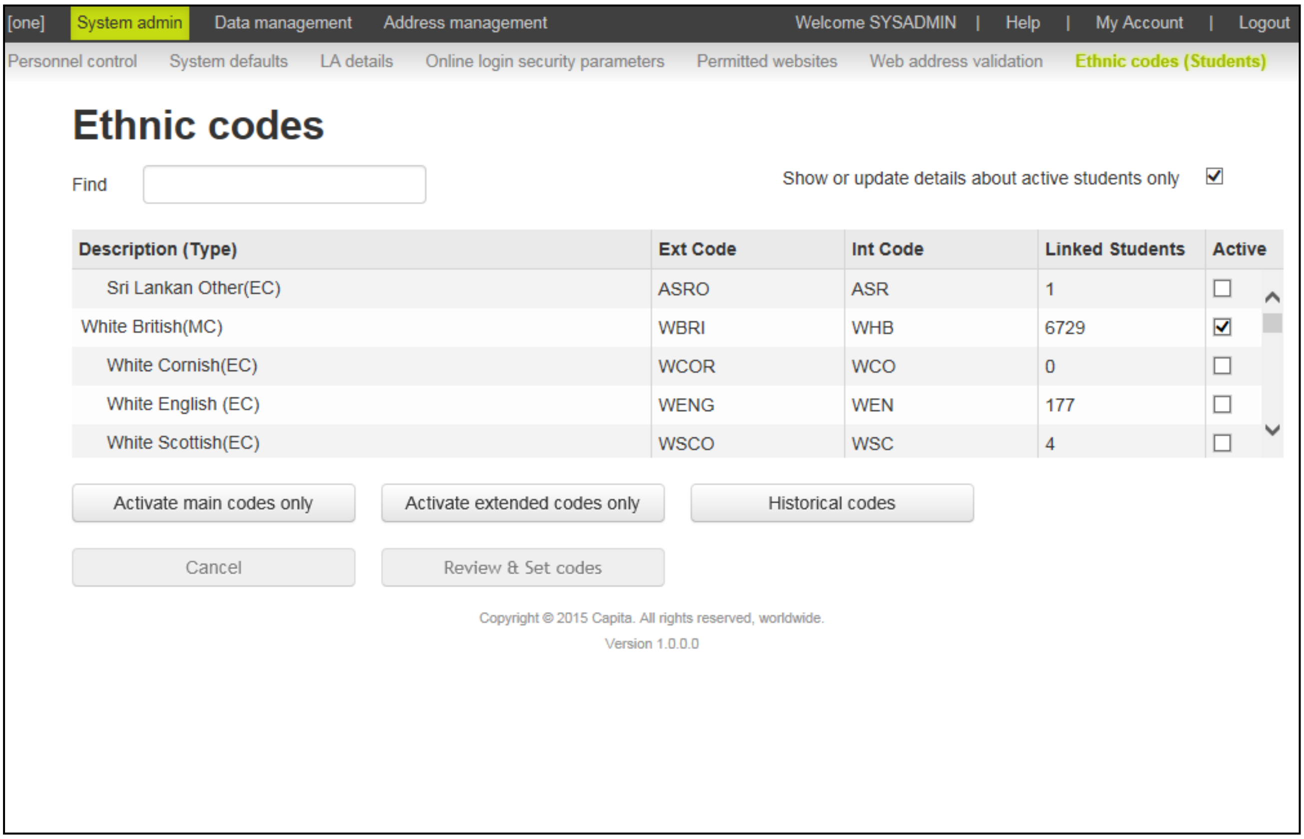
Column Name	Description
Description (Type)	The name of the ethnic code followed by the type of code that it is. For example, 'White British (MC)' indicates that the code is White British and the type is Main Code.
Ext Code	The external code value.
Int Code	The internal code value.
Linked Students	Displays the number of students who have the code held against them in the STUDENT.ETHNIC_OR table, allowing the Local Authority to assess the usage of the code.
Active	When selected, the code can be selected within the One software. If deselected, the code is not available for One users to select against a student.
Show or update details about active students only	If selected, the number in the **Linked Students** column reflects only the number of active students. If deselected, the number in the **Linked Students** column also includes inactive students.

Activating/Deactivating Ethnic Codes

In order to make an ethnic code available to One users, it must be activated. Although you can have a mix of codes, you cannot have a mix of codes under a main code. For example, if you select White British (MC), then you cannot activate individual extended codes, i.e. White Cornish (EC) or White English (EC). If you do select a subordinate code, then the main code is automatically deactivated.

To activate ethnic codes:

1. In the **System admin** area, select the **Ethnic codes (Students)** page. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6*.

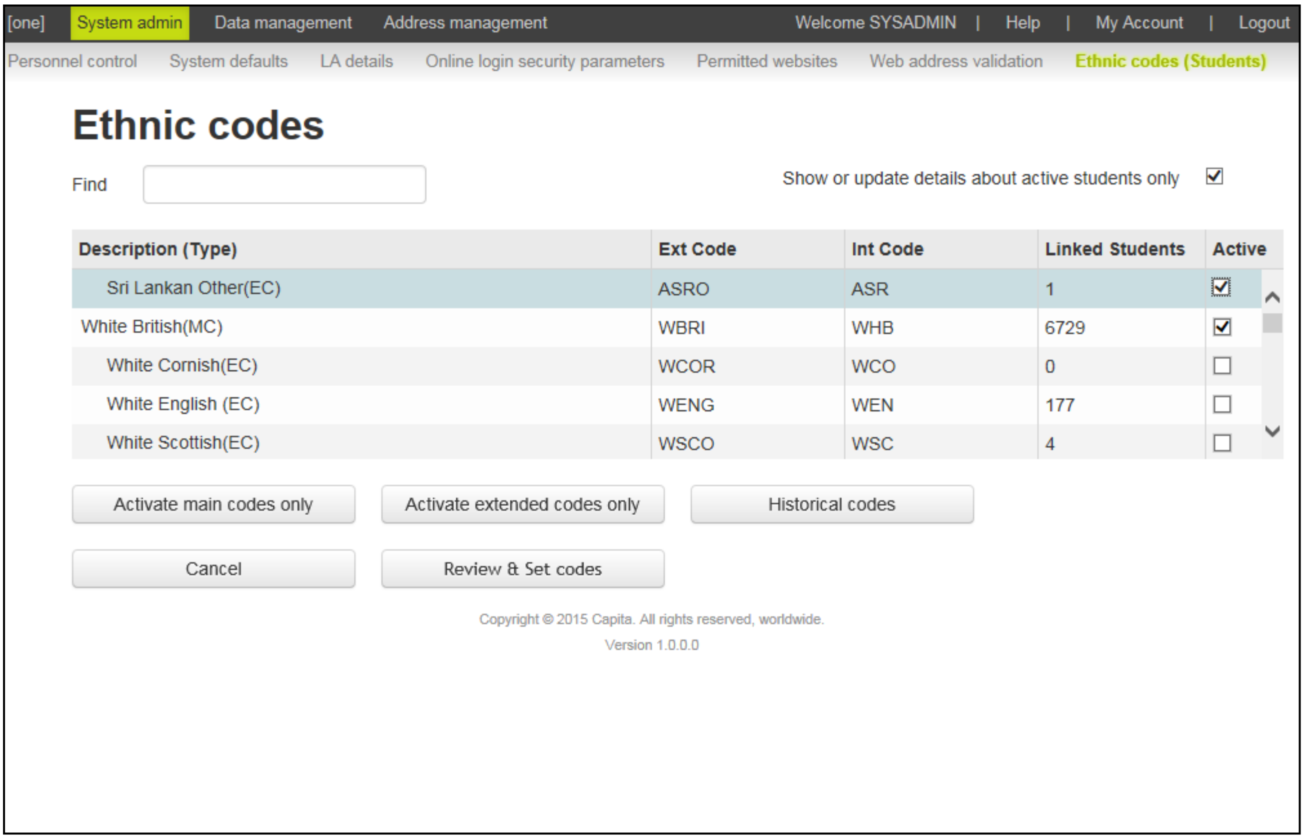


2. If you want any changes to the codes to apply to active students only, select the **Show or update details about active students only** check box. Deselect the check box to apply changes to all students.

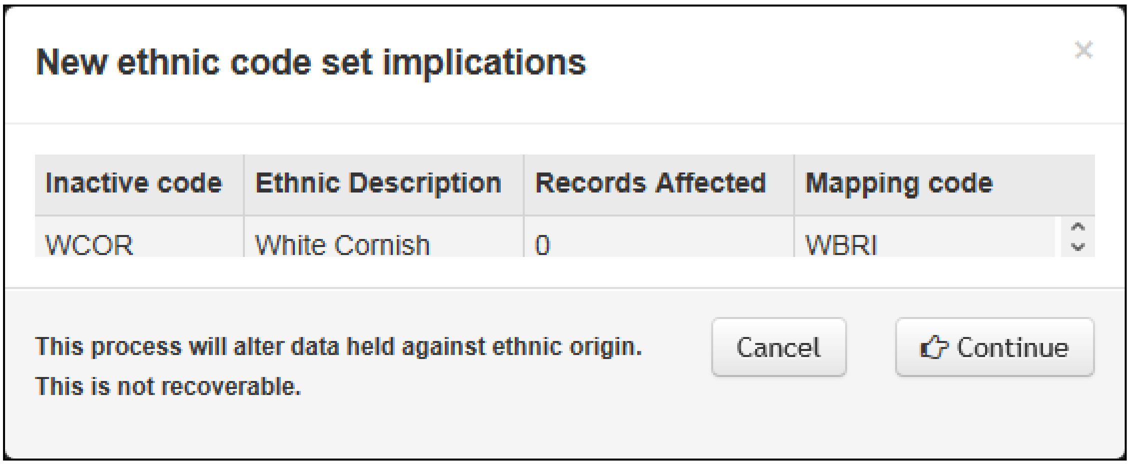
NOTE: *Selecting or deselecting the **Show or update details about active students only** check box alters the numbers displayed in the **Linked Students** column.* *Selecting this option also affects the records that are updated when you click the **Review & Set Codes** button. This option is provided so inactive student records are not affected when you change the current valid ethnicity values.*

3. To activate all the main codes, click the **Activate main codes only** button (this deactivates all other code types). To activate all the extended codes, click the **Activate extended codes only** button (this deactivates all other code types).
4. If you need to refine the selected codes, (e.g. to include some extended codes when generally you use only main codes), select the **Active** check box for the individual codes you require.

NOTE: *If you select an extended code, then the parent main code is deactivated automatically.*



5. When you have made your changes, click the **Review & Set codes** button to display the **New ethnic code set implications** dialog.



6. Review the proposed changes then click the **Continue** button to update the ethnic codes. The codes are updated in the Lookups Table (*ID 0001*) and in the Ethnic Origin field in the STUDENT.ETHNIC_OR table.

IMPORTANT NOTE:

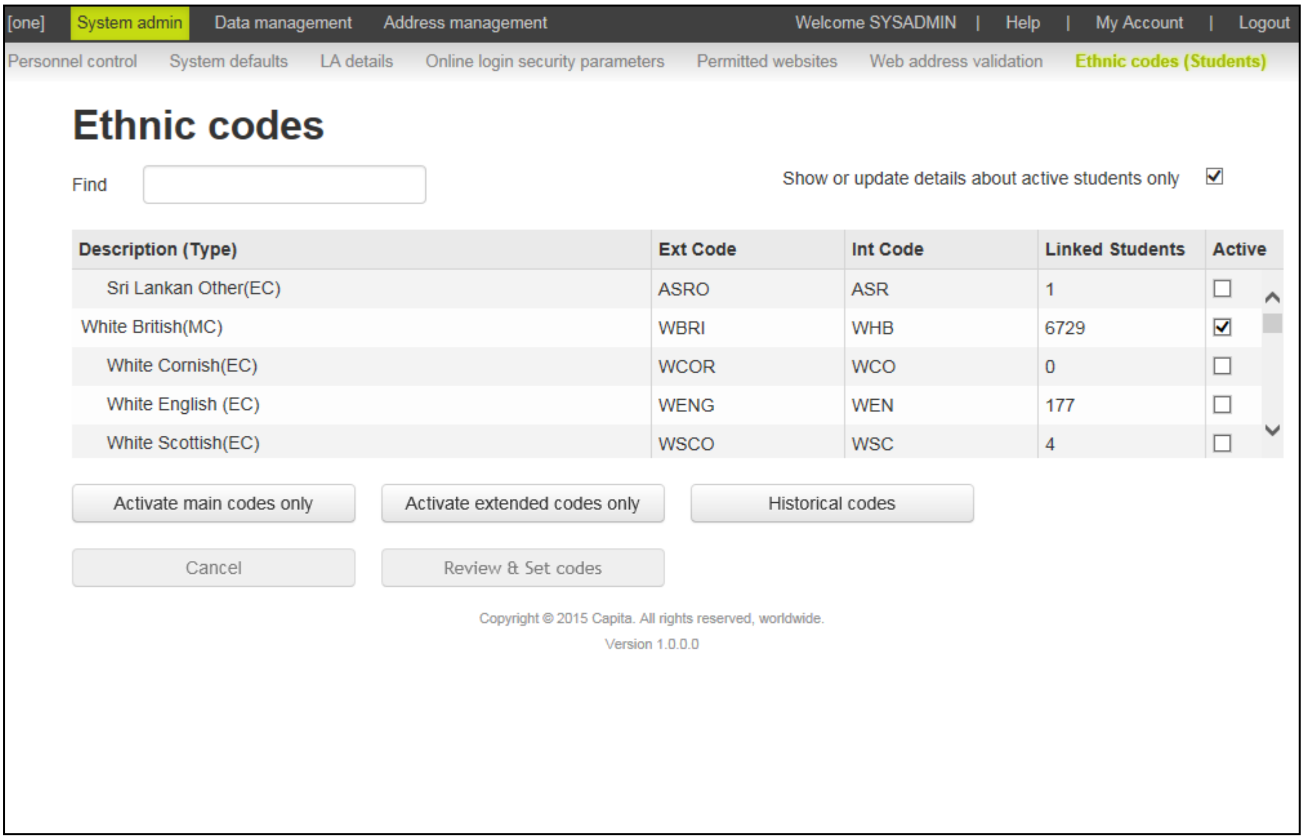
Existing One Codes not recognised as CBDS Codes will be made inactive.

Viewing Historical Codes

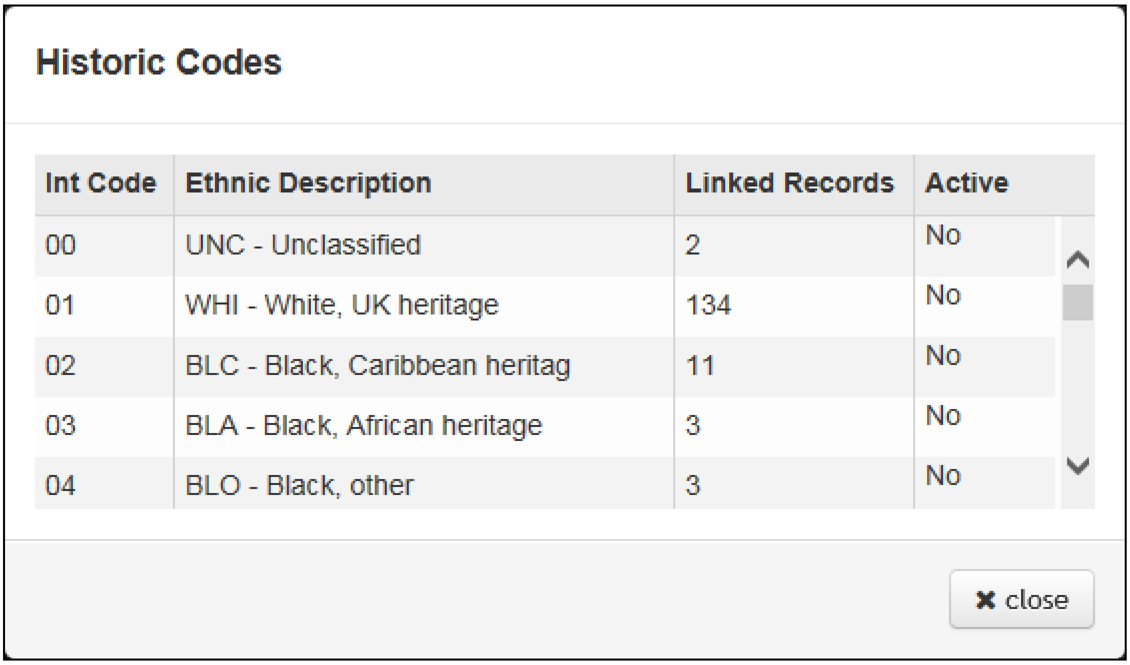
You can view existing One (non-CBDS) ethnic origin codes that are currently linked to one or more students that do not have an equivalent CBDS code. You can view the **Active** status of the code and the number of student records linked to the code. The code information is taken from the **Module Administration | User Codes** lookup (*Lookup ID 0001*).

To view historical codes:

1. In the **System admin** area, select the **Ethnic codes (Students)** page. For information on accessing the System Administration v4 site, see [Accessing the System Administration v4 Site](#) on page *6.*



2. Click the **Historical codes** button to display the **Historic Codes** dialog.



Int Code	Ethnic Description	Linked Records	Active
00	UNC - Unclassified	2	No
01	WHI - White, UK heritage	134	No
02	BLC - Black, Caribbean heritag	11	No
03	BLA - Black, African heritage	3	No
04	BLO - Black, other	3	No

3. When finished reviewing the list, click the **close** button to return to the **Ethnic codes** page.

10 | Changing Name Case

Introduction to Case Change

The **Case change** page enables you to standardise the type case of all entries made in student and people name fields. This is useful for tidying up names that have been entered in an inconsistent manner. You can choose to standardise the different name fields to be Mixed Case or CAPITALISE. By default, No Change is the selected option.

Exceptions

Generally, all names are automatically updated with the selected case when you run the routine. However, there are a set of exceptions that require you to run a second routine. This enables you to ensure that all name types are handled in accordance with your LA's policies. The following table shows the name types that must be handled via the exceptions routine.

NOTE:

Exceptions apply to both given and family names. The examples below use family names, but if a given name had a hyphen (e.g. Anne-Marie) then the name would be included in the xx-xx exception list.

Exception Rule	MixedCase	CAPITALISE
macxxx (macpherson)	MacXxx (MacPherson)	MACXXX (MACPHERSON)
mcxxx (mckean)	McXxx (McKean)	MCXXX (MCKEAN)
x'xxx (o'neil)	X'Xxx (O'Neil)	X'XXX (O'NEIL)
x,x,x – d,j,nelson	X,X,X (D,J,Nelson)	X,X,X (D,J,NELSON)
x.x.x – d.j.nelson	X.X.X (D.J.Nelson)	X.X.X (D.J.NELSON)
xx xx (jones smith)	Xx Xx (Jones Smith)	XX XX (JONES SMITH)
xx-xx (jones-smith)	Xx-Xx (Jones-Smith)	XX-XX (JONES-SMITH)
xxx-macxxx (smith-macdonald)	Xxx-MacXxx (Smith-MacDonald)	XXX-MAC-XXX (SMITH-MAC-DONALD)
xxx-mcxxx (smith-mckean)	Xxx-McXxx (Smith-McKean)	XXX-MC-XXX (SMITH-MC-KEAN)

Running the Case Change Routine

The case change routine will run against all records in the One database, with names that do not fall into any of the previously defined exception types. The **Mixed case** option converts names to start with a capital letter (sam smith > Sam Smith). The **Capitalise** option makes all letters capital letters (sam smith > SAM SMITH) and does not generate any exceptions.

The case change routine must update many records and can therefore take a long time to complete. If possible, the routine should be run when usage of the One system is at a minimum to minimise possible performance issues.

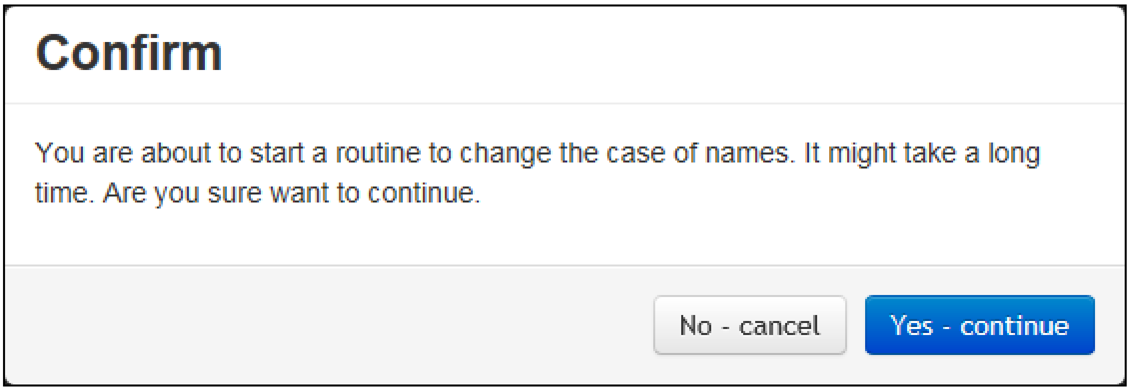
The process can be run by any user with the appropriate permissions, but only one instance of the process can be running at a time. Therefore, if user A starts the case change process, user B cannot run the process again until the process started by user A finishes.

To run the case change routine:

Changing Name Case

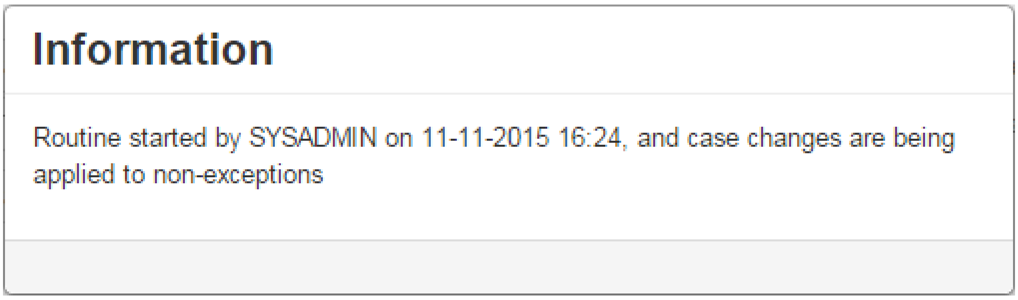
1. In the **Data management** area, select the **Case change** page. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6.*

2. Select the required case type for each of the name fields. The default is **No Change**.
3. Click the **Apply case changes** button to display a confirmation dialog.



4. Click the **Yes – continue** button to start the case change routine.

   An information dialog is displayed that details the user who started the routine and at what time.



Once the routine has completed the screen is displayed as noted in step 1 of the Running the Case Change Routine for Exceptions topic on page *43.*

If the routine returns any exceptions, they are displayed in the **Exceptions List** section. You can review the exceptions and then apply appropriate case types. For more information, see Running the Case Change Routine for Exceptions on page *43*.

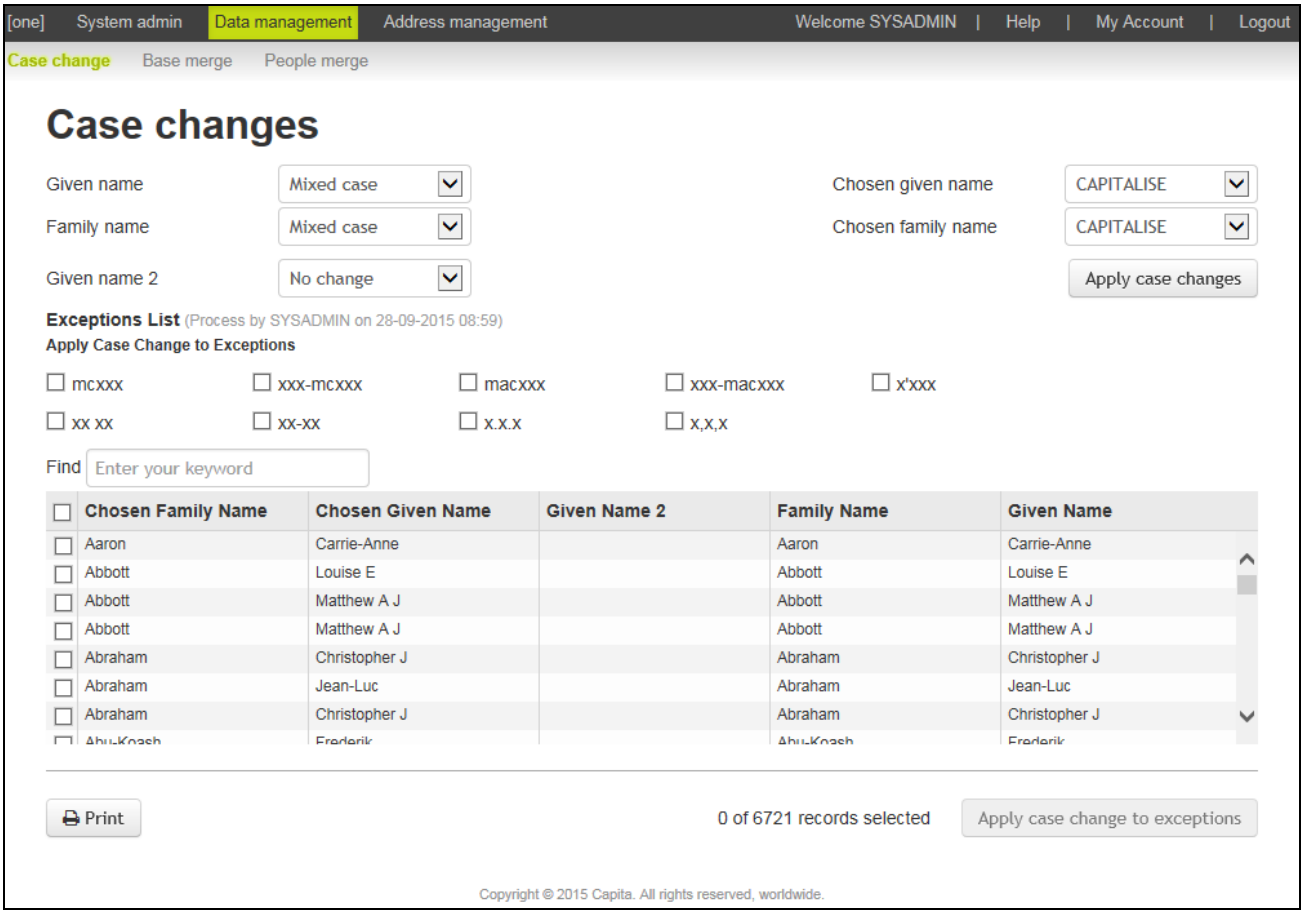
Running the Case Change Routine for Exceptions

Names that require special processing, such as names with a hyphen (e.g. Anne-Marie) or an apostrophe (e.g. O'Neil), are displayed in the **Exceptions List** section. You can select the records you want to change from the list and then run the case change process again to update the records in the **Exception List**. Filters are provided to select all records that have been put in the list for the same reason.

> ***NOTES:***
>
> *One defaults the name formats to that selected when the non-exception records were processed. This helps to ensure that a consistent rule is applied when exceptions are processed.*

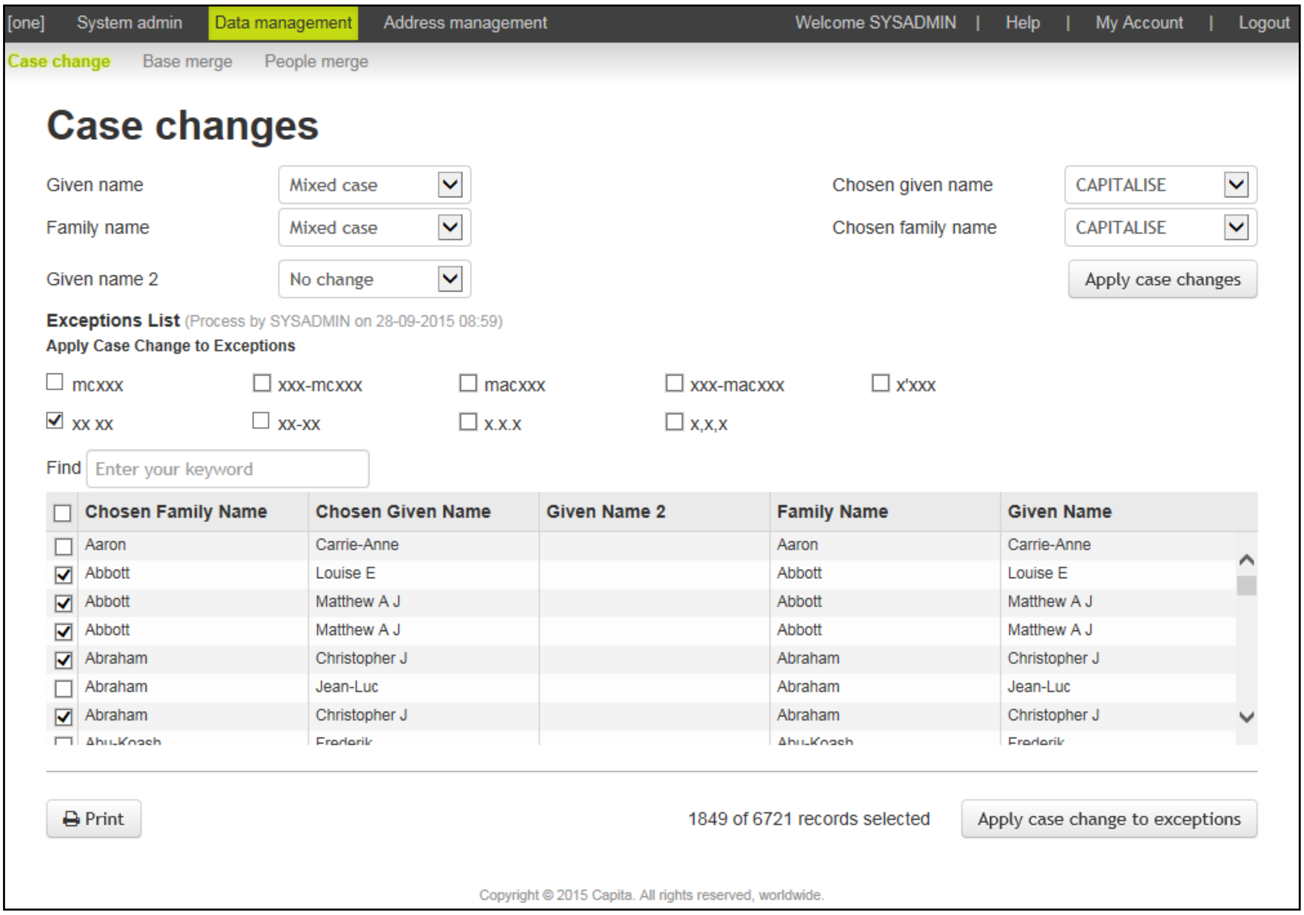
To change the case type for records in the **Exceptions List**:

1. In the **Data management** area, select the **Case changes** page. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6*.



2. In the **Exceptions List** area, select the check box for each record you want to update or use the filter check boxes to select all the records in the exceptions list that share the same characteristics. In the following graphic, all the names in the xx xx format are selected using the check box.

Changing Name Case



3. Ensure that the correct case types are selected for each name field. For more information on how the names in the **Exceptions List** are handled, see Exceptions on page *41*.
4. Click the **Apply case change to exception** button to display a confirmation dialog.
5. Click the **Yes – continue** button to start the case conversion process. An informational message indicating that the process is running.

11 | Transferring Student Bases

Introduction to Student Base Transfer

The **Base merge** page enables you to transfer students from a source base into a transfer (destination) base. For example, you might want to transfer a group of students from an infant school into a junior school by selecting the infant school as the source base and the junior school as the transfer (destination) base.

The Base Merge routine ends the school history record for the source base. The end date applied is one day less than the start date selected for the destination base.

Base Merge and Admissions & Transfers

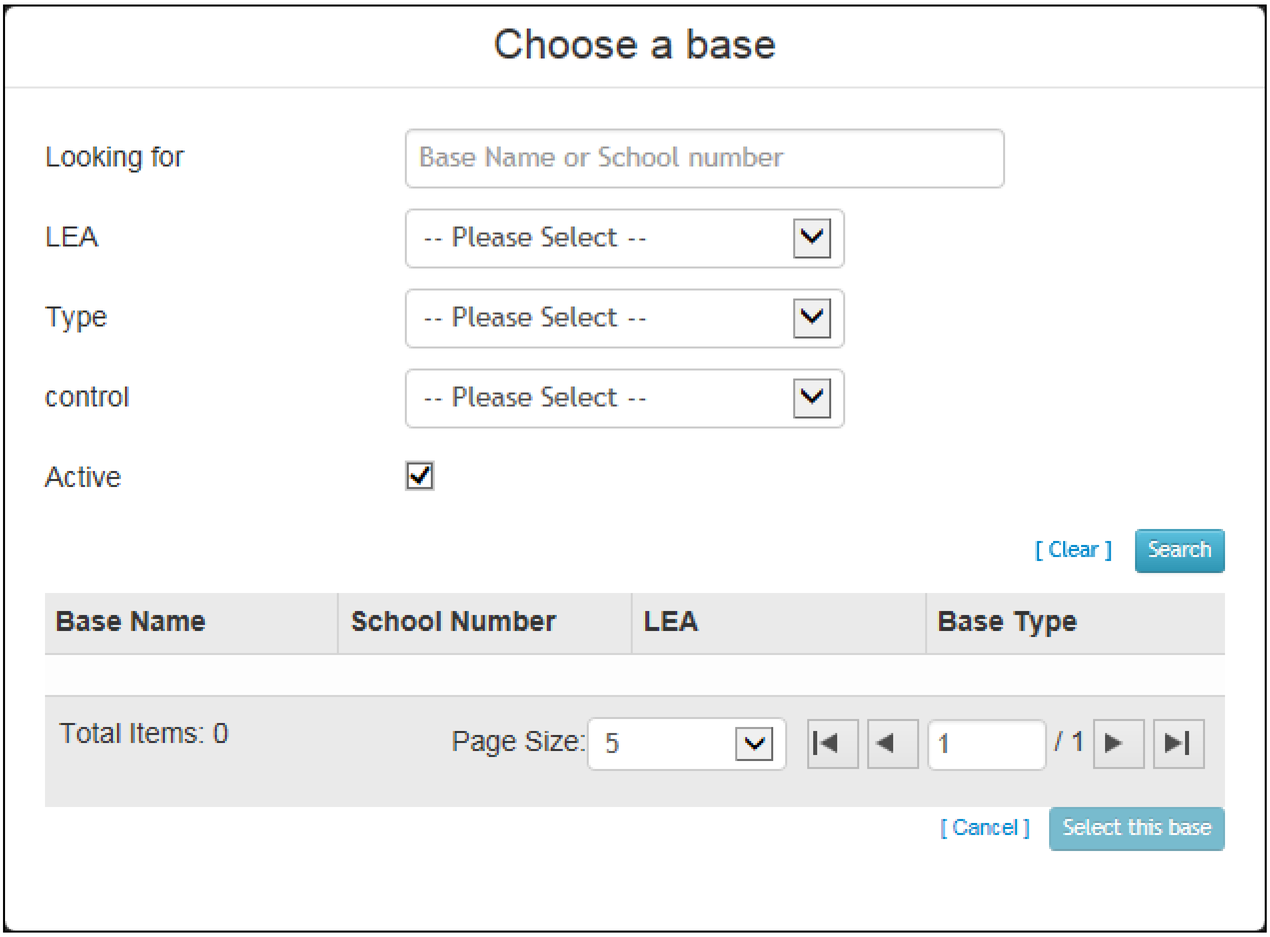
The Base Merge routine does not update A&T preferences. If bases that are no longer considered active have been used for preference recording, it is important that the preference continues to reflect the original parent selection. However, this means that if the Local Authority is using the Final Transfer routine to allocate school history and the allocated base is the old, inactive base then the school history is created for this base. In this scenario, Local Authorities should consider running the Base Merge routine after the Final Transfer has been processed.

Merging Base Sudents

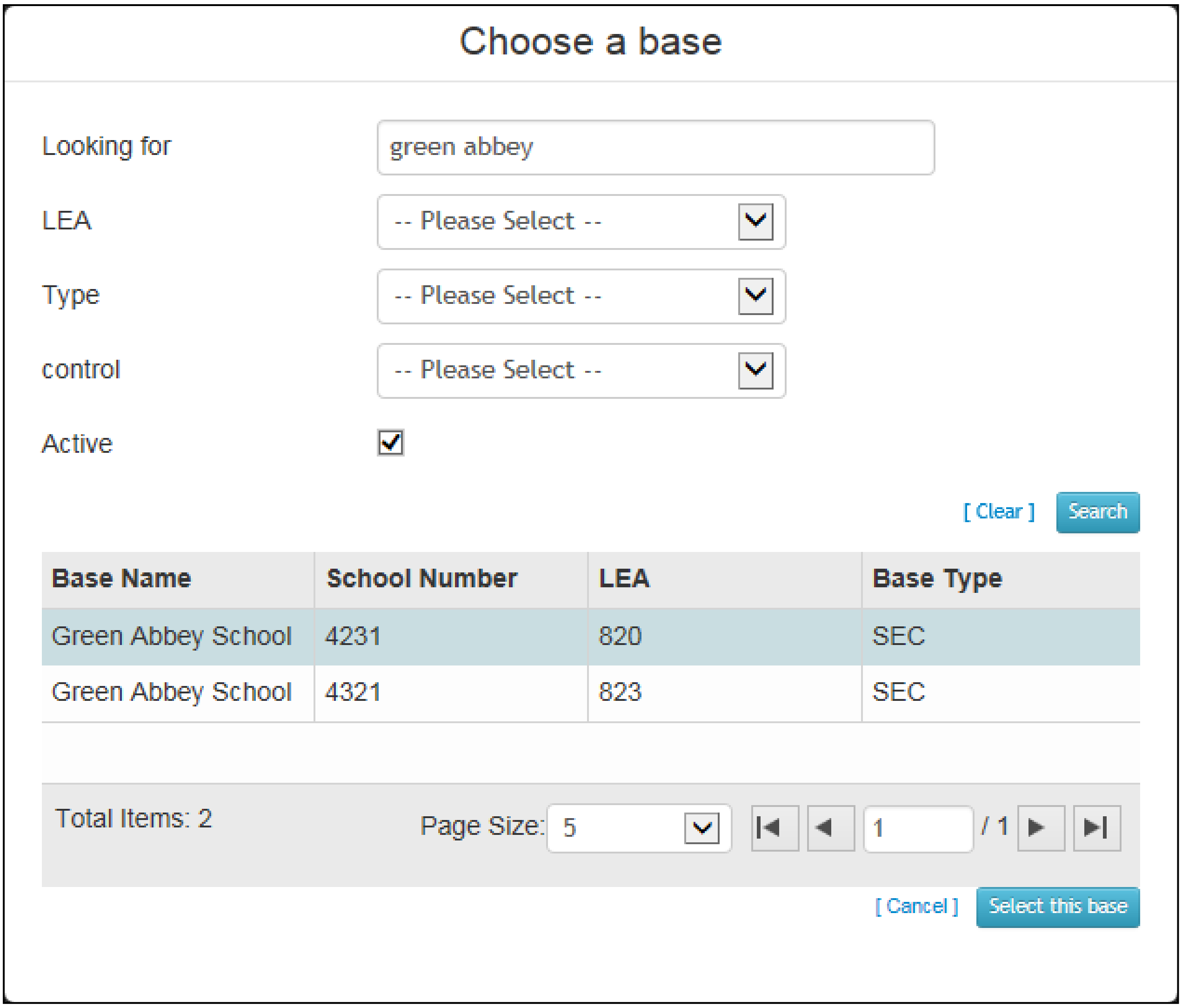
To transfer students from one base to another:

1. In the **Data Management** area, select the **Base merge** page. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6.*

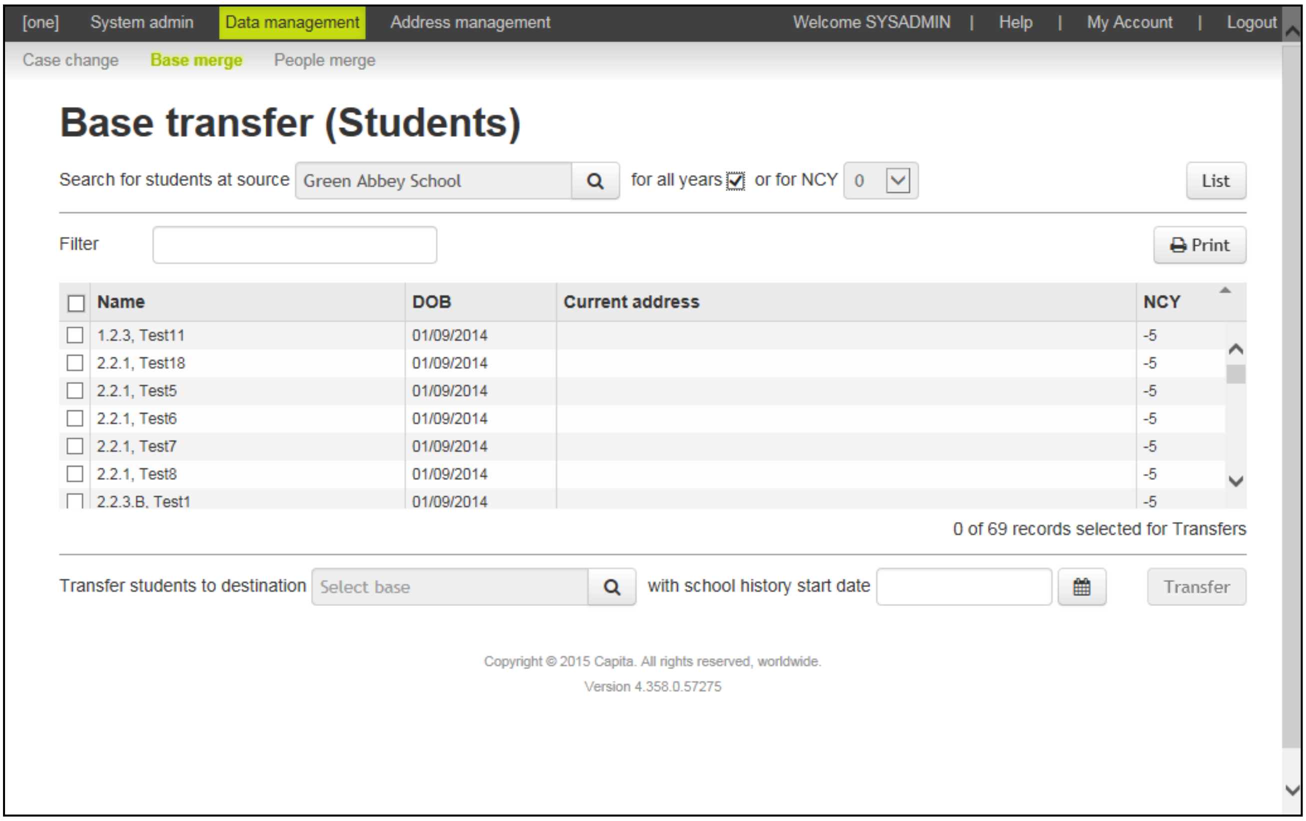
2. In the **Select base** field, click the magnifying glass icon to display the **Choose a base** dialog.



3. Enter your search criteria then click the **Search** button to display the bases that meet the criteria.

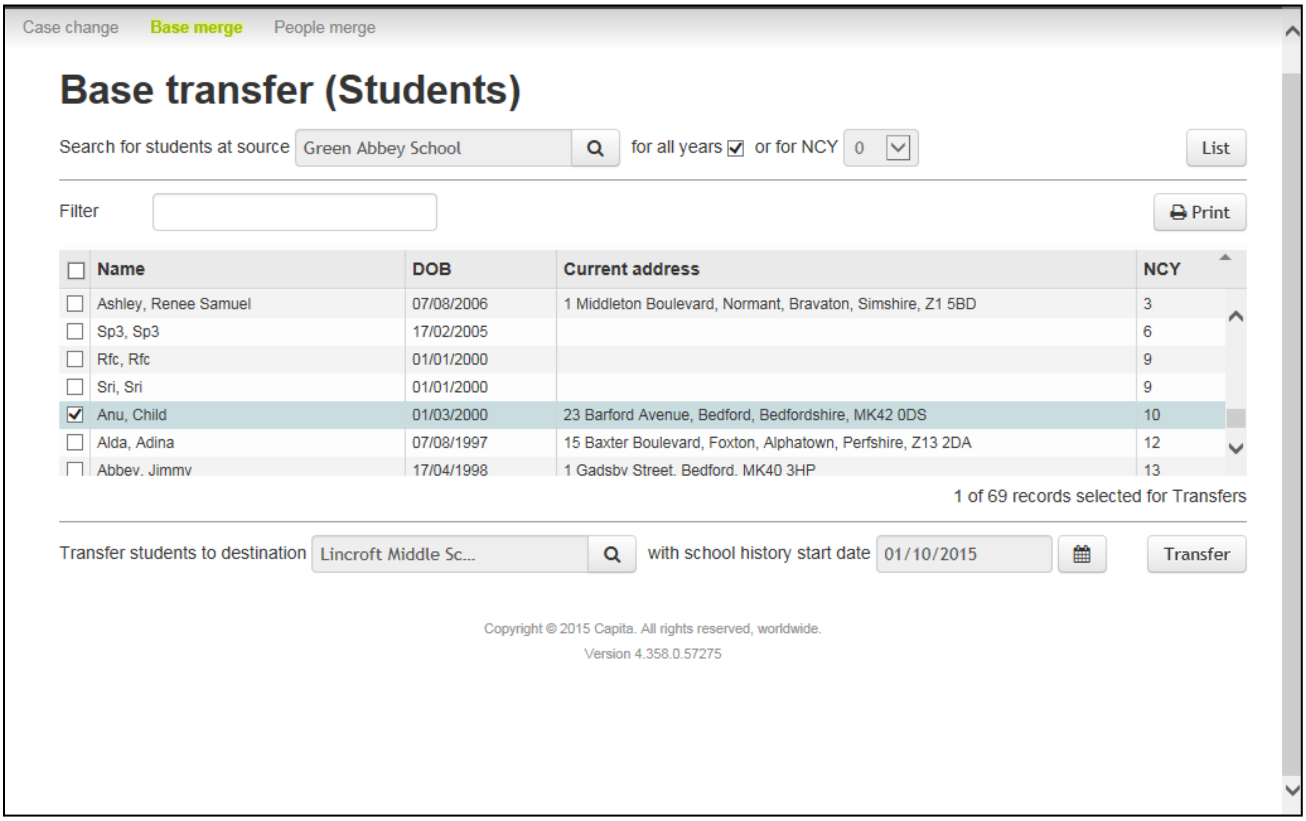


4. Highlight the required base from the list then click the **Select this base** button to return to the **Base transfer (Students)** page.
5. Click the **List** button to display a list of the students at the base.



You can limit the list to a specific academic year by deselecting the **for all years** check box and then selecting an **NCY**. You can also enter names or address information into the **Filter** to further reduce the number of displayed records.

6. Select the check boxes for the students you wish to transfer. You can select all results by selecting the check box in the table header.
7. Below the list of students, select the destination base to which you want to transfer the selected students. For more information on selecting a base, see steps 2-4.
8. Select the start date on which the school history will start at the destination base.



9. Click the **Transfer** button. When the transfer is complete, the **Success** confirmation is displayed.
10. Click the **OK** button to return to the **Base merge** page.

12 | Merging People Records

Introduction to People Merge

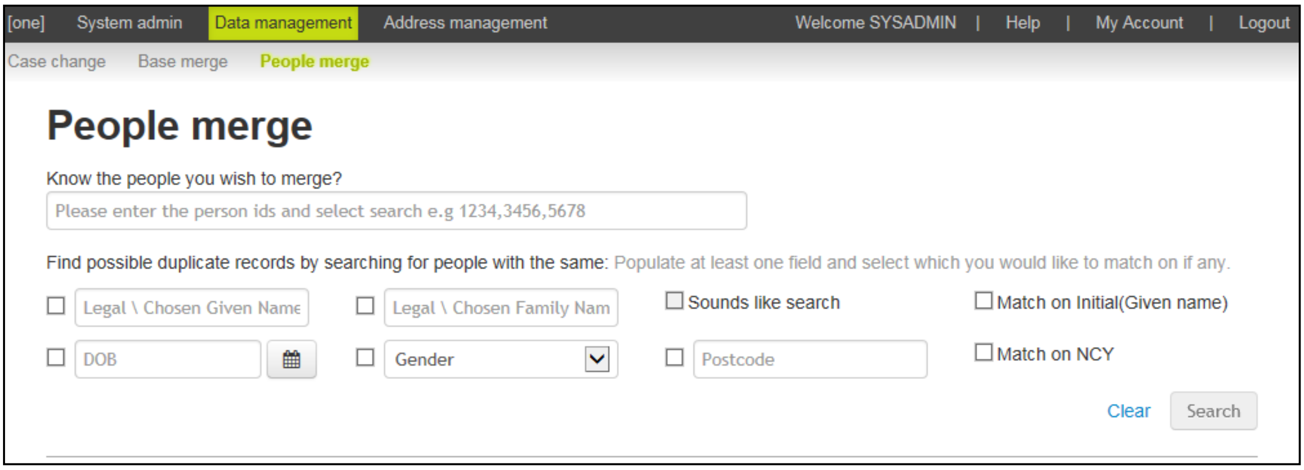
The **People merge** page enables a system administrator to merge the records (and all the record's dependencies) of multiple people into one record in the PEOPLE table.

This process makes it possible to merge records where two or more people records have been created in the database. This can occur if separate users enter details for the same person with minor differences, e.g. surnames starting with Mc and Mac. Alternatively, during an import process, if an "add new record" option is flagged, unmatched records are created automatically and duplication can occur.

Manual Search Criteria and Results

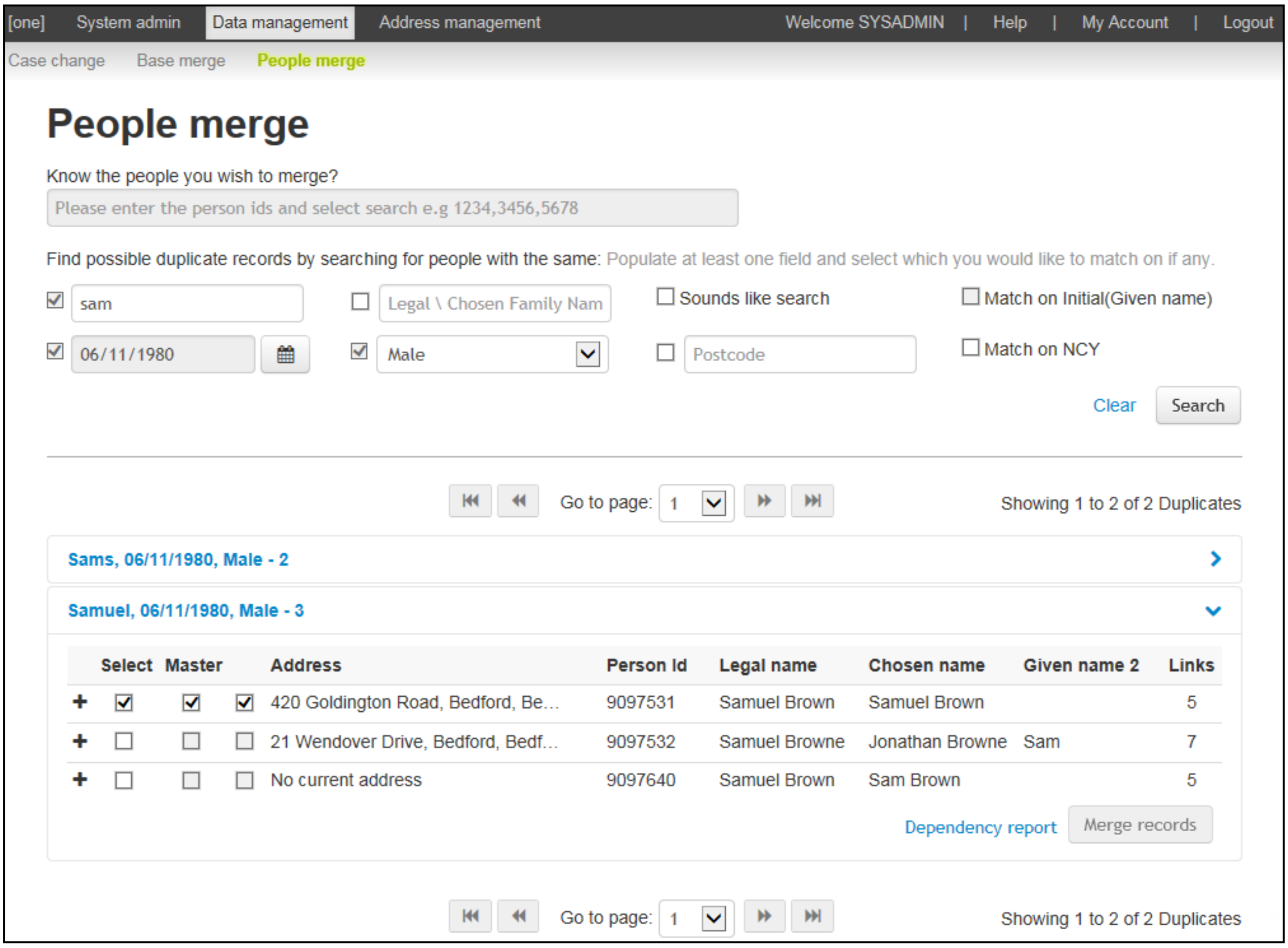
One provides a number of search criteria on which to find potential duplicates and also provides detailed information about each returned record to help ensure you only merge true duplicate records.

Search Criteria



- If you enter details in the **Legal \ Chosen Given Name** field, then the **Match on Initial (Given Name)** option cannot be selected, and vice versa.
- If you have entered details into the **Legal \ Chosen Given Name field, the Legal \ Chosen Family Name** field or both, you can select the **Sounds like search** check box. This performs a phonetic search on the name entered. This feature is especially useful for finding records where the names entered might differ, but the **DOB** and **Postcode** could be the same.
- For **DOB**, **Gender** and **Postcode** fields, you can enter a specific value to aid flexibility when identifying duplicate people records.
- Instead of entering specific details, you can select the check box adjacent to a search criterion to return all possible duplicates.

Results



Search results are displayed in groups of potential duplicates, based on the results matching the selected criteria. In the first group of potential duplicates in the previous graphic, there are two records with same **Legal \ Chosen Given name** (Sams), **DOB** (06/11/1980) and **Gender** (Male). The second group consists of three records with the same **Legal \ Chosen Given name** (Samuel), **DOB** (06/11/1980) and **Gender** (Male).

If more than 15 people are found who match the search criteria, One does not display the individual records. Instead, the following message is displayed:

> Too many duplicate records have been found, please refine your matching and search criteria.

This restriction helps to ensure that the returned records are more likely to be actual duplicates.

Use the information provided to decide if the returned records are duplicate or not.

Column	Description
Select	Include the record in the merged record.
Master	This record will be kept; all other data will be merged into it.
Check box adjacent to the address	The selected address becomes the correspondence address for the merged record even if the master record has a different address.

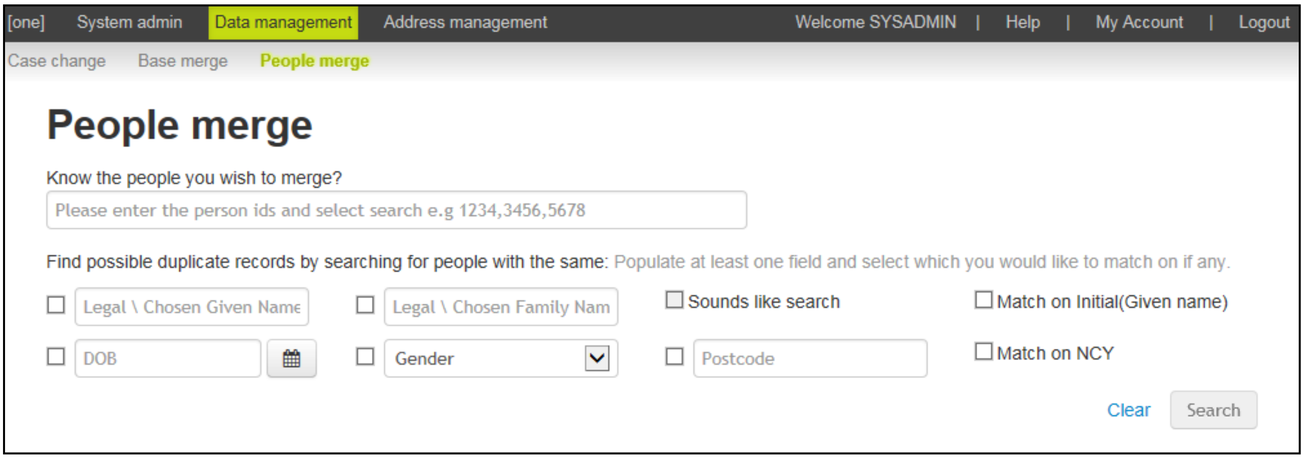
Column	Description
Person Id	The person ID of the returned record.
Legal Name	Legal name associated with the returned record.
Chosen name	Chosen name associated with the returned record.
Given name 2	The given name of the person also known as 'Middlename'.
Links	The total number of other records associated with the returned STUD_ID or PERSON_ID, e.g. claim records or A&T application records. This provides a high-level understanding of the richness of the record. Clicking the **Dependency Report** button displays information on the specific types of linked records.

Clicking the blue group headers displays the details of each potential duplicate record. You can click the **+** icon next to record to display additional information.

Merging People Records

To merge people records:

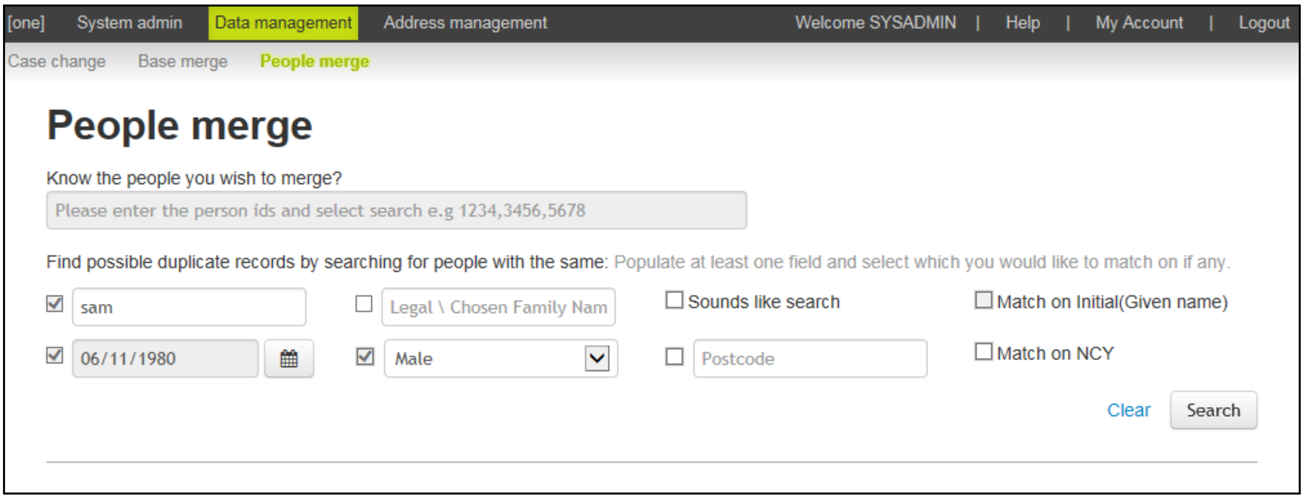
1. In the **Data Management** area, select the **People merge** page. For information on accessing the System Administration v4 site, see Accessing the System Administration v4 Site on page *6*.



2. If you know the person IDs assigned by One for the people you want to merge, enter the numbers in the **Know the people you wish to merge?** field. Separate the person IDs with a comma.

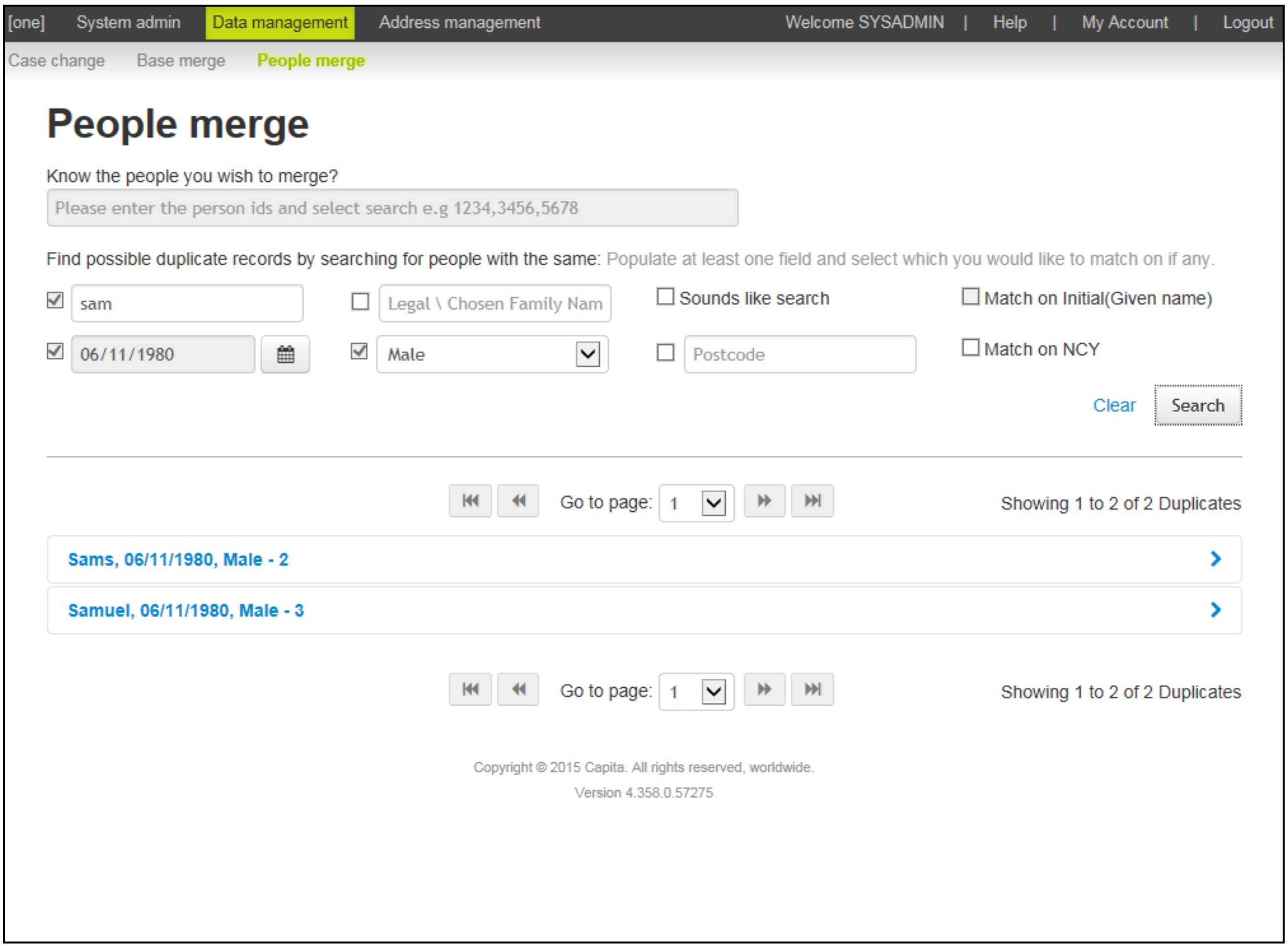
> ***NOTE:***
>
> *A maximum of 10 IDs can be entered at a time.*
>
> *You cannot use person IDs and other manual search options at the same time.*

If you do not know the person IDs for the people you want to merge, enter as much known detail as possible in the additional search fields.

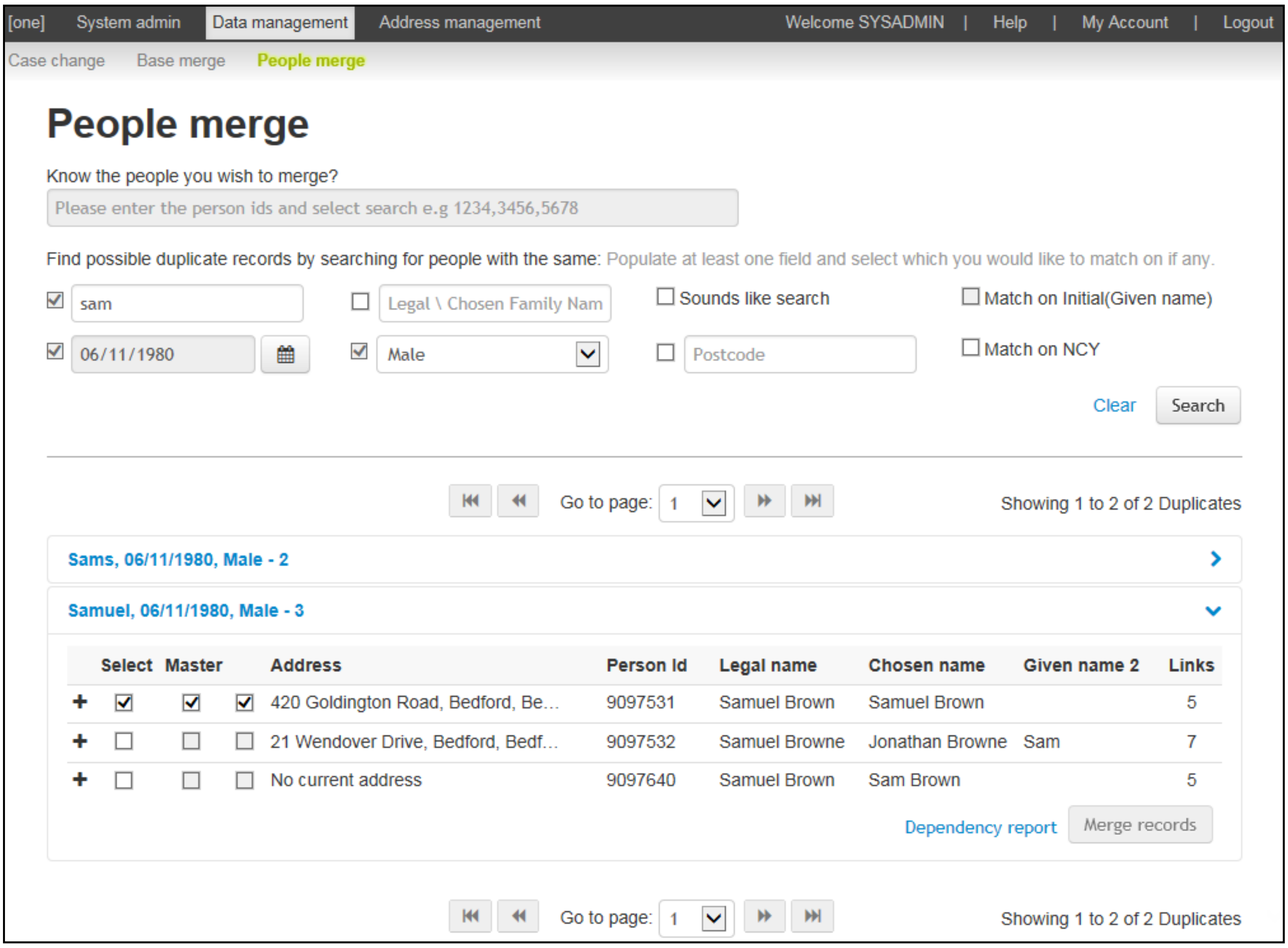


3. Click the **Search** button to display a list of users that meet the entered criteria. Records that match on the criteria are grouped together under the same heading. In the following graphic, the records match on the given name (Samuel), the DOB (06/11/1980), the gender (male) and there are two records in the group.

> ***NOTE:***
>
> *One returns records only if more than one record has been found that meet the criteria. Therefore, if specific records are known that do not match on the manual search criteria, use the ID search instead.*

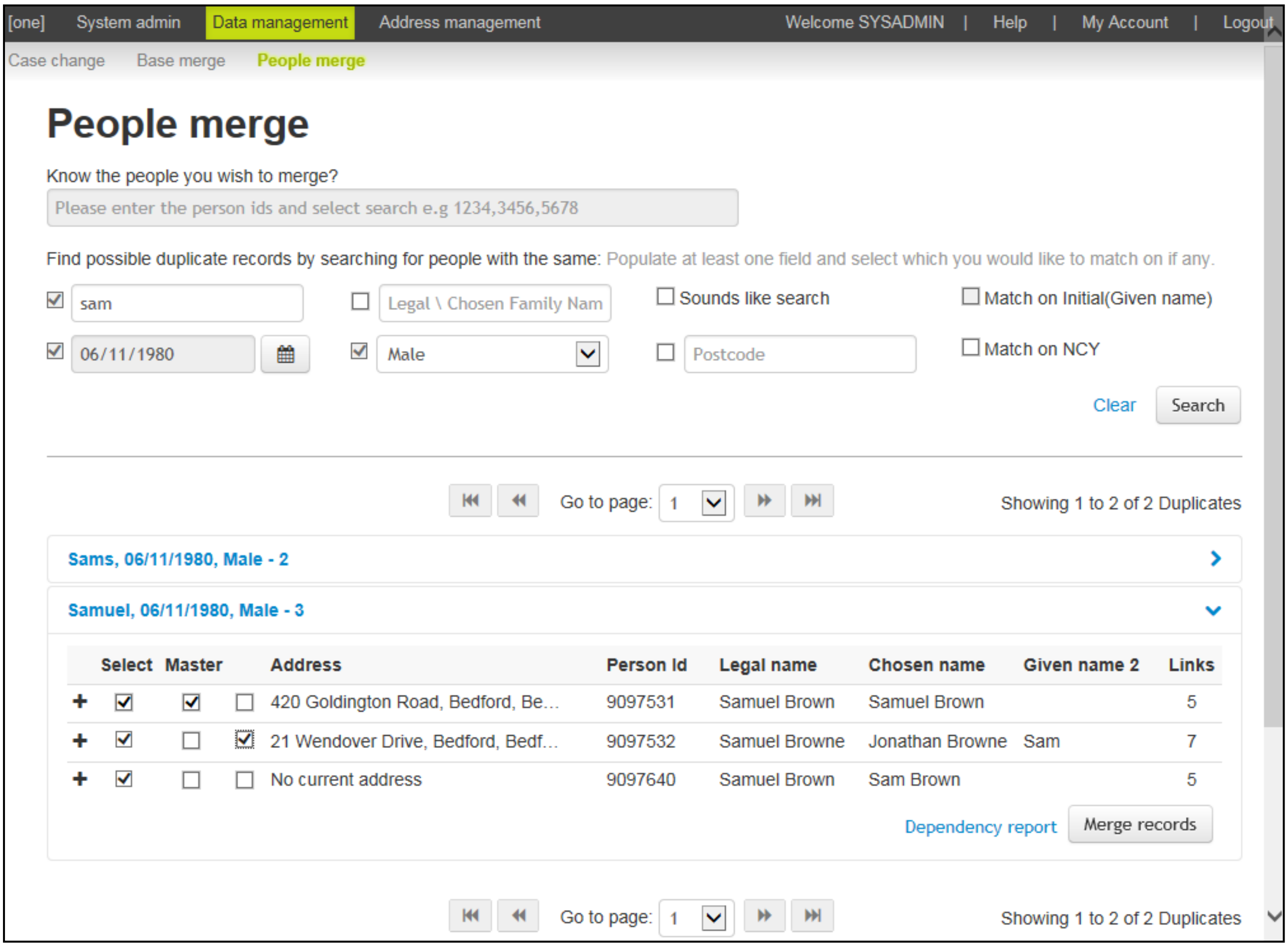


4. Click the blue results group to display the records that meet the search criteria. In this example, we know we are looking for people with the first name 'Samuel' (not 'Sams'), so we will click the second grouping to expand it.

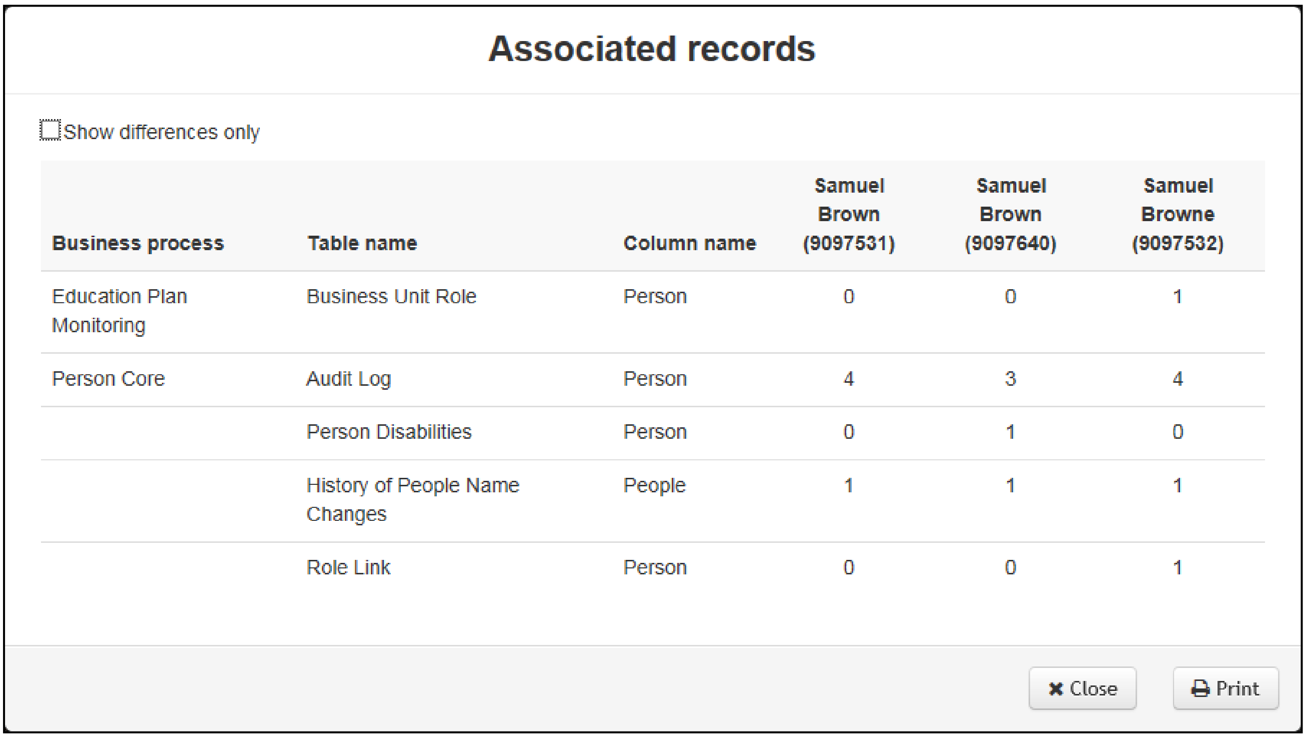


5. Select the check box for the records you want to merge.

   Selecting the **Master** check box indicates that this is the record that will be kept; and other data will be merged into it. In this example, the record with person ID 9097351 will be kept. Selecting the **Address** check box for a record will use the address of the selected record as the correspondence address for the merged record, regardless of correspondence address currently recorded on the master record.



6. If you want to review the number of records associated with each person record, click the **Dependency report** hyperlink to display the **Associated records** dialog. A maximum of five records can be compared at a time.



Associated records

☐ Show differences only

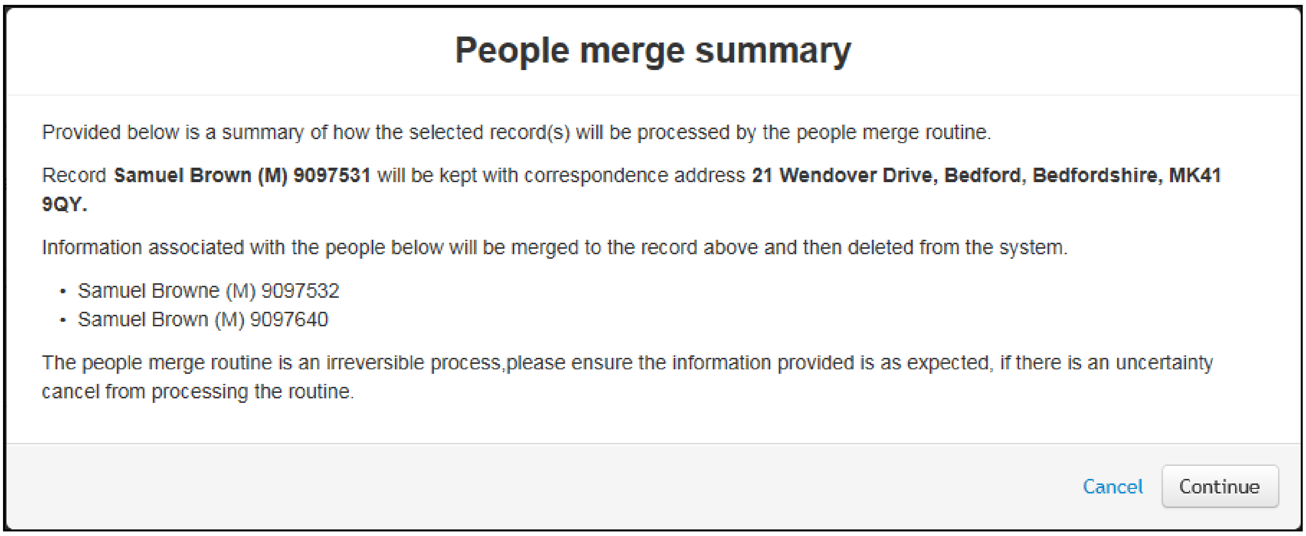
Business process	Table name	Column name	Samuel Brown (9097531)	Samuel Brown (9097640)	Samuel Browne (9097532)
Education Plan Monitoring	Business Unit Role	Person	0	0	1
Person Core	Audit Log	Person	4	3	4
	Person Disabilities	Person	0	1	0
	History of People Name Changes	People	1	1	1
	Role Link	Person	0	0	1

✖ Close 🖶 Print

Select the **Compare differences only** check box to suppress rows where the people displayed have the same number of records. It does not mean the content of the records are different, making only a simple comparison of the number of associated records per business process \ table.

Click the **Print** button to print the report or click the **Close** button to return to the **People merge** page.

7. When you are satisfied that you have selected the correct records, click the **Merge records** button to start the merge process and display the **People merge summary** dialog.



8. Read the summary carefully and ensure that you want to complete the merge as described.

> ***WARNING!*** *If you click the* ***Continue*** *button, you will make irreversible changes to the One database. You must ensure you have selected the correct people records. If you are not sure, you should click the* ***Cancel*** *button and verify your selections.*

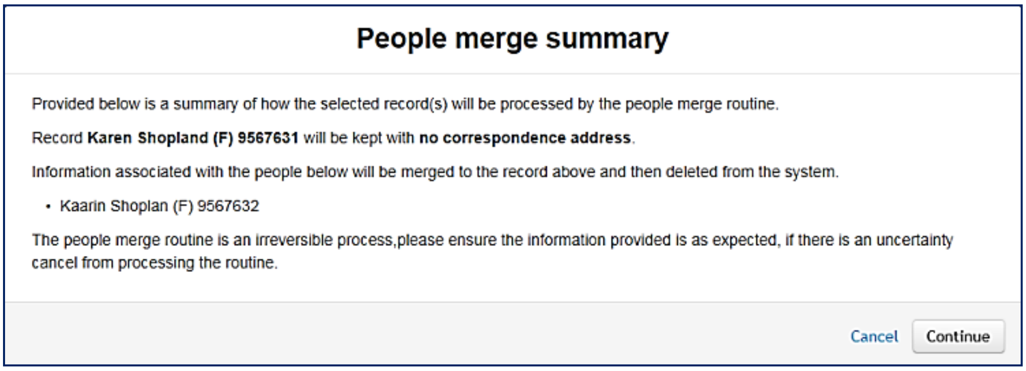
9. Click the **Continue** button to start the merge for the selected records. When the merge is complete, a confirmation dialog is displayed.
10. Click the **Ok** button to close the confirmation dialog and return to the **People merge** page.

In this example, once the merge has completed, the three records are now one record with the person ID of 9097531. The screen would refresh and the records would no longer be displayed because there are no duplicates for that group remaining. If one record was merged the group would still be displayed, showing the remaining record in One.

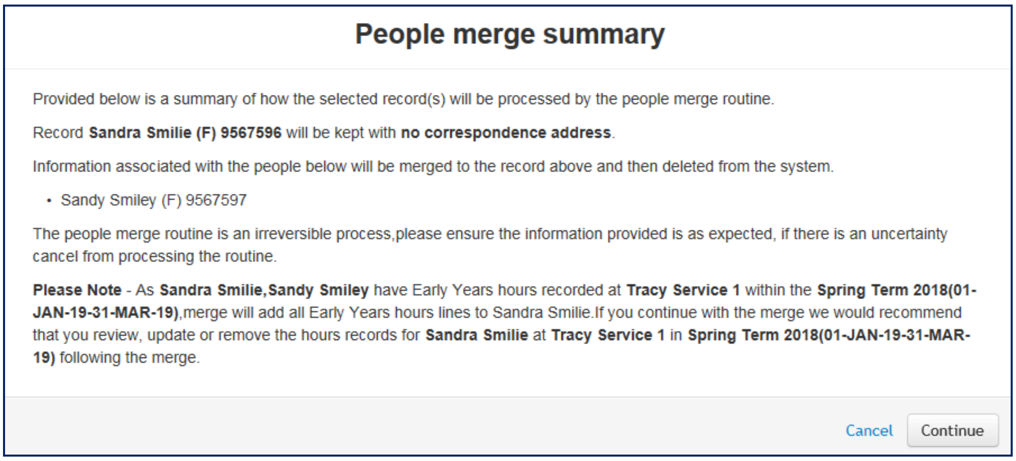
Merging Early Years Funded Children

The process involved when merging two children who exist in the same funded service within the same term has been amended to enable the two records to merge more efficiently. The changes made are:

1. If neither child has any hours recorded, then;
   - the hours record of the master child will be retained. The hours record for the other child will be deleted. After deciding which record will be kept, click the **Merge records button** to start the merge process, which will display the **People merge summary** screen.



2. If one or both children have hours, and/or payments recorded then;
   - the master record will retain all hours and payments that were originally recorded in both records. Once the decision has been made on which record to keep, start the merge process which will display the People merge summary screen with the additional paragraph as shown below:



NOTE:

Message being displayed: “Please note - as both <Child A / Child B> have Early Years hours recorded at <Funded Service Name> within the <Term Name(s)>, merge will add all Early Years hours lines to <Child A>.If you continue with the merge we would recommend that you review, update or remove the hours records for <Child A> at <Funded Service> in <Term Name(s)> following the merge."

The message being displayed means that following the merge you may decide to remove or modify the hours record, delete a generated payment or issue an amendment to reclaim funds when a payment has already been authorised.

13 | Managing People Matching

Introduction to Manage External GUIDs

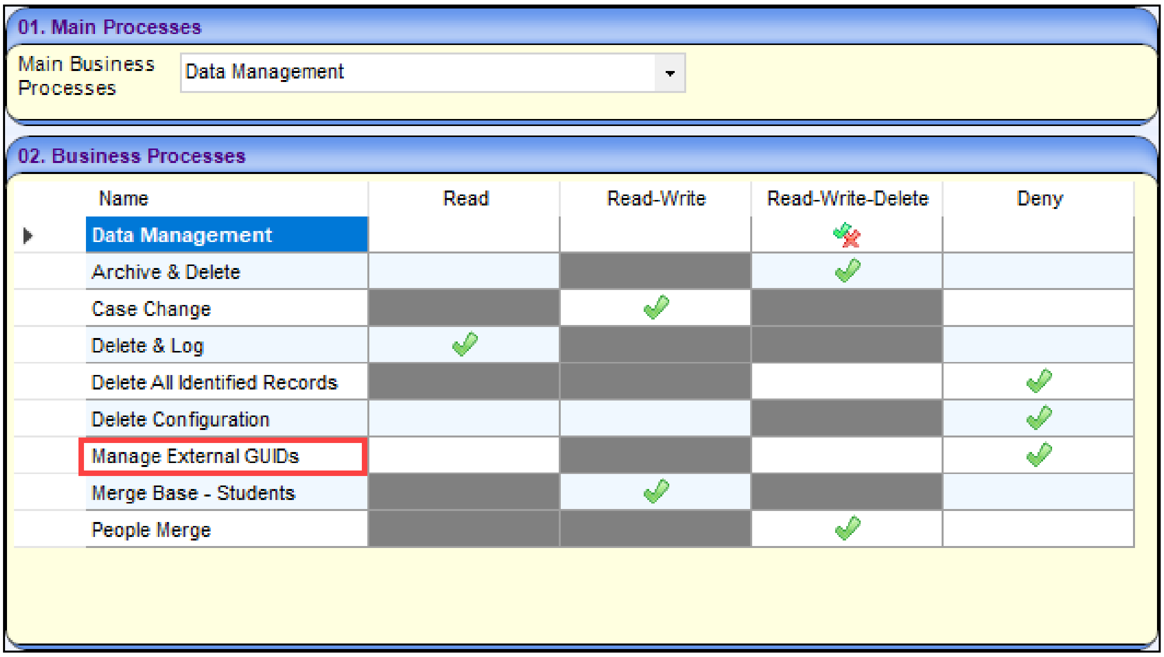
When student or carer data is received from schools, the system will attempt to match the record using the GUID if one exists in the file. The incoming GUIDs are stored in a table called EXTERNAL_GUIDS.

The **Manage External GUIDs** screen allows the local authority to see stored external GUIDs, so that they can verify that data is being matched properly. The **GUIDMATCH** parameter must be set to **True** and relevant permissions given to enable this functionality (see *System Defaults* on page *9* for the GUIDMATCH parameter).

Permissions

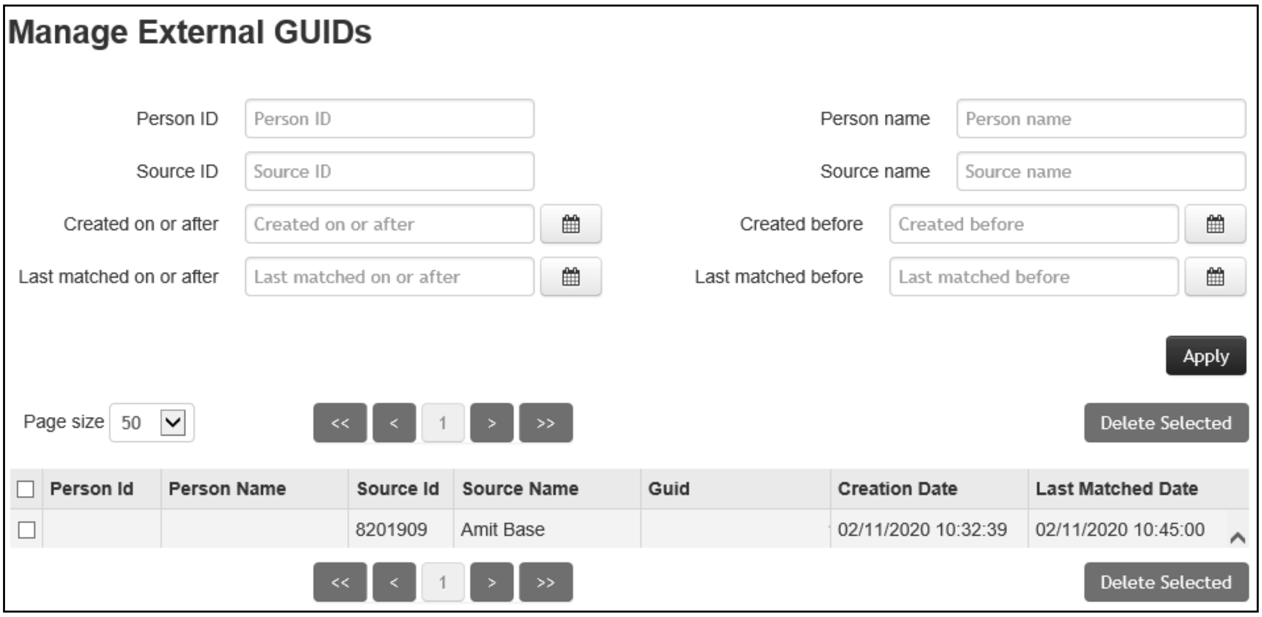
V4 client | Tools | Permissions | User Group Processes

Select the **Data Management** option for the **Main Business Processes** field and set the permissions for the **Manage External GUIDs** as **Read-Write-Delete**:



Manage External GUIDS

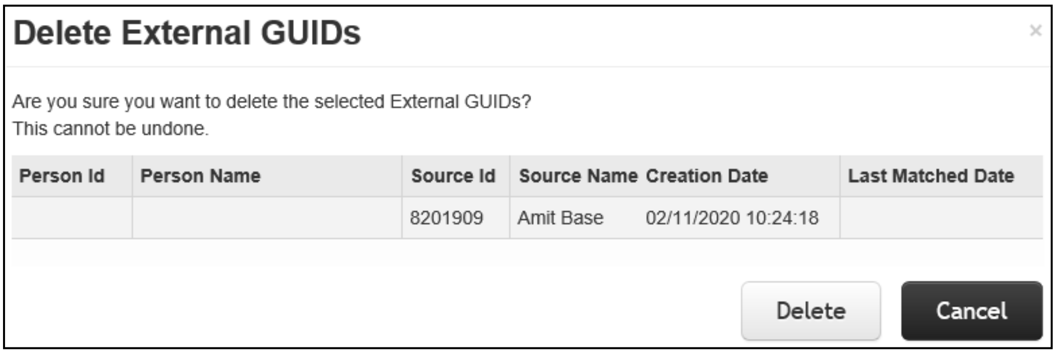
The **Manage External Guids** screen lists all external GUIDs which have been added to the External GUIDs table.



From here you can view all records in the table or search for specific records using the filters. If delete permission has been given, you can select records to be deleted from the table.

To delete a record:

1. Select the checkbox next to the required record.
2. Click the **Delete Selected** button. A confirmation message is displayed.



Warning: This action cannot be undone.

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