CAPITA

one

Setting Up One Better Start for Local Authorities

last updated for the Autumn 2016 release

Technical Guide

Revision History

Version	Published on
Autumn 2016 (3.61) - 1.0	05/12/2016

Doc Ref

Setting Up One Better Start for Local Authorities Technical Guide/Autumn 2016/2016-12-05

www.capita-one.co.uk

Contacting the Service Desk

You can log a call with the Service Desk 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, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other 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.

Contents

01 / **Introduction and Prerequisites**

Overview

This document describes how to configure the Better Start Assessments module for use in the One Provider Self Service portal. The portal is hosted in the One web-tier and therefore the server components are installed by the One Technical Services team. However, there are configuration steps that must be carried out on the mid-tier components as well. For Local Authorities that manage their own mid-tier infrastructure, these mid-tier configuration steps must be carried out by the local IT department. Finally, there are configuration steps that must be completed by a One Administrator via the One v4 Client and within the Provider Self Service portal.

> *IMPORTANT NOTE: This handbook assumes that you have an existing Provider Self Service portal installed. If you do not, please refer to the* Technical Guide - Deploying and Configuring the One Provider Self Service Portal for Local Authorities *document available on the One Publications website (http://www.onepublications.com).*

Using this Handbook

This handbook is intended to be used by One Administrators to configure the One environment to use the Better Start Assessments module. It is assumed that the One Provider Self Service portal have already been installed by the One Technical Services team. Configuration is required in the One v4 Client and within the One Provider Self Service portal.

Prerequisites

- Existing Provider Self Service portal installation.
- A Better Start Assessments licence.
- Early Years migrated to v4.

Configuring Better Start Assessments checklist

For the Better Start Assessments module, a One Administrator should complete the following steps:

Step	Where to do it	What to do	Completed
1	**v3 Client**	Install appropriate Better Start Assessments licence in the v3 Client. For more information, see Licensing Better Start Assessments on page *3*.	☐
2	**v4 Client**	Create a Better Start Assessments administrator. For more information, see Assigning Permissions on page *4*.	☐
3	**Provider portal**	Activate the Better Start Assessments administrator account. For more information, see Activating a Provider Portal User Account on page *5*.	☐

| Step	Where to do it	What to do	Completed
4	**v4 Client**	Edit the bases to be used in Better Start Assessments. For more information, see Editing Bases on page 6.	☐

02 / Installing the license

Licensing Better Start Assessments

To enable the Better Start Assessments module, you must install the Provider Portal Better Start Assessments licence key. A One Administrator should enter the required licence keys before the installation of the server components.

To apply the required licence keys:

1. In the v3 Client, select **Tools | Licensing** to display the **Site Licence Details** dialog.
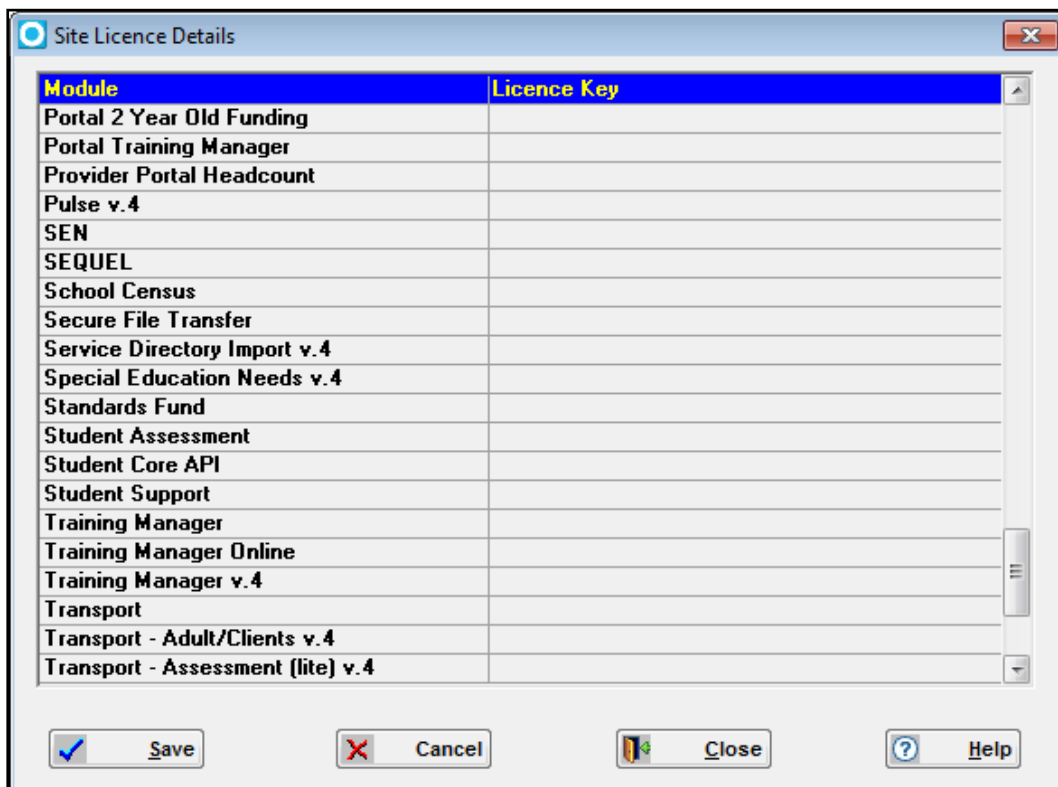
2. Enter the required **Licence Key** for the **Better Start Assessments** module.
3. Click the **Save** button.

03 | **Setting user permissions**

Assigning Permissions

All Better Start Assessments users and administrators, either at the LA or at the provider, must be One users created in the v4 Client and have a valid email address recorded against them. After being created, users should be added to a relevant group in the v4 Client.

You will need to create at least two new groups and assign them the respective business processes in v4 User Group Processes.

User type	Main Business Process	Business Processes
Provider users	Provider Portal	Better Start User (`Read-Write`)
Portal administrators	Provider Portal	Better Start Administrator (`Read-Write`)

MORE INFORMATION:
RG_Permissions_User Group Permissions
RG_Permissions_User Group Processes
Managing Users, Groups & Permissions handbook available from My Account and the One Publications website (www.OnePublications.com).

Portal Back Office User Permissions

The Better Start Assessments module collects information from providers and incorporates those details into the One database for processing. To manage incoming Better Start Assessment applications via the Portal Back Office, a user must be assigned to a group that has the required permissions for the following business processes:

Main Business Process	Business Processes
Portal Conflict Management (`Read-Write`)	Various business processes: assign `Read`, `Read-Write`, `Read-Write-Delete`, or `Deny` dependent on the types of information you want the selected user group to be able to view and edit.
Portal LA Data Processing (`Read-Write`)	Incoming Students (`Read-Write`)

Main Business Process	Business Processes
Portal Back Office Access	Better Start (`Read-Write`)

Depending on how your LA manages workloads, you might assign these permissions to the Better Start portal administrator group or assign these permissions to a different user group that manages incoming data but does not have administrator access to the Better Start portal.

> **MORE INFORMATION:**
> *RG_Permissions_User Group Permissions*
> *RG_Permissions_User Group Processes* available from My Account and the One Publications website(www.OnePublications.com)*.*

Creating a Portal User Account

To create a new portal user account, the One System Administrator must:

1. Set up the user in One v4 and assign to them to the relevant group for the modules to which they require access, either as a user or administrator.

2. Send the log in details (user name and initial password) to the new user via either email or an alternative method.

Activating a Provider Portal User Account

When the user first logs in with their user name and initial password, they are informed that an activation email has been sent to them and that they <u>must</u> click on the activation link in the email to verify their email address. The user must:

1. Click on the unique link contained in the email.

2. Enter their user name and original password.

They are prompted to change their password and, if second factor authentication is enabled, to select a secret question and supply an answer.

Logging into the Provider Portal

After activating their account, the user can log into the portal.

Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

> *NOTE: The **Secret Question** page is only displayed if second factor authentication is enabled via **Site Administration | Site Setup | Configuration**.*

04 | Setting Up Better Start Assessments

Editing Bases

Better Start Assessments uses the Portal Back Office to match incoming student information with those who already exist in the One database. This is similar to the functionality provided in One B2B:Student. In order for the matching process to work, each funded provider used within the Provider Portal must be assigned a base that has the B2B Student Base flag selected and the XML transfer option deselected in the One v3 Client. If these flags are not set correctly, then the Provider portal will warn you and set the B2B Student Base flag when you first attempt to create a task for that funded provider. However, the portal will not change the value of the XML transfer option, and this must be deselected manually.

Disabling the XML Transfer Option

Any bases that will be used in the Provider Self Service portal must have the XML transfer option deselected in the One v3 Client.

1. In the One v3 Client, double-click the **Bases** button to display the **Bases** window.

2. Select **Focus | Base** to display the **Select a Base** dialog.

3. Filter the list as required then double click the required base to display its details.

4. On the **Base** tab in the **Miscellaneous Information** panel, deselect the **XML Transfer Base** check box.

5. Click the blue tick icon in the top right of the page to save the change.

6. Select **Focus | Exit** to leave the Bases area.

Making a Base a B2B Student Base

Although the Provider Self Service portal can automatically make an existing base into a B2B Student Base, you can also set this manually via the One v4 Client.

1. In the One v4 Client, select **Focus | Bases | Bases** to display the **Base Enquiry** page.

2. Enter any search criteria for the required base, then click the **Search** button.

3. In the list of results, double-click the required base to display the **Base Definition** page.

4. In the **Basic Details** panel, select the **B2B Student Base** check box to display the **Users** dialog.

5. Highlight the One account that should be the B2B:Student user. This is used to identify new data that has been automatically imported via the Provider Portal/B2B:Student.

6. Click the **Select** button to add the user and close the dialog.

   The check box should now display a tick (not an x).

7. Click the **Save** button.

05 | **What Next?**

If required, Better Start Assessments administrators can customise the Better Start Assessments module further or start creating tasks and processing submissions from provider portal users. They should also create the required users and assign them to the appropriate services. For more information on using Better Start Assessments, refer to the *Using One Better Start Assessments Portal* handbook, available from the One Publications website (http://www.onepublications.com).

Index