



Online CSS | My Workload

My Activities | Activity Details

Menu: CSS | My Workload | My Activities | New | Activity Details

Prerequisites for Creating an Activity

- 1 **One v3:** User **MUST** be mapped to a PERSON on the **One** database (usually themselves)
Tools | System Administration | Users | User Details | Mappings
- 2 **One v4:** Create **POSTS** – Tools | Team Structure
- 3 Add **USERS** (Caseworkers etc) to **POST**
- 4 Create **ESTABLISHMENTS** – Tools | Team Structure
- 5 Add **POSTS** to **ESTABLISHMENTS**
- 6 Create **SERVICE TEAMS** – Services | CSS Team Administration
- 7 Link **SERVICE TEAMS** to **ESTABLISHMENTS**
- 8 Populate **LOOKUPS** for use when creating Activities


Select  **New** from **My Activities** to create a new Activity. **Owner** and **Service Team** are mandatory.

Activity Details

Use these buttons to set up **Alerts** and **SQL Mail Merge**

Use these buttons to **Save, Print** and manage **Linked Documents**

My Workload > Activity Details

Activity Details | Alerts | SQL Mail Merge | 

Activity Details | EPM Activity | Focus/Target Group | Time/Additional Details | Linked/Recurring | Link People | Memo | UDFs

Activity Owner: Service Team:

Activity Type *

Description

Activity Details: An Activity must have an **Owner**, a **Service Team** and an **Activity Type** (* Required Field)
Service Team is set up via **One v4 | Focus | Services | CSS Service Teams Administration**.
Activity Type is set up via **One v4 | Tools | Administration | Lookups**.



Activity Duration

Start Date: Start Time:

End Date: End Time:

Complete By: Main Activity:


Recurring Activity:

Activity Duration: Not available for **Linked Activities**. Enter or edit **Dates** using calendar. Enter or edit **Times** using  or .
Main Activity and **Recurring Activity** are read-only fields

Capita One - Activity

1 overlapping Activities have been found. Do you wish to save this Activity anyway?

If you set up more than one Activity with the same times you will receive a warning message. It is still possible to save the Activity.


The  **UDFs** button will be available in **Activity Details, Activity Duration** and **Location Details**, if a UDF has been set up in v4 client.

Location Details

Base:

Site:

Location:

Location Details: could be a Base, School or Home address of a Child/Parent/Carer. Use  to open **Base Enquiry** and **Address Enquiry**



Online CSS | My Workload

My Activities | Activity Details

Menu: CSS | My Workload | Activity Details | EPM Activity / Focus Target Group / Time/Additional Details

EPM Activity

The **UDFs** button will be available in **EPM Activity, Activity Focus, Target Group, Additional Details and Activity Time**, if UDFs have been set up in v4 client.

The tree view is defined in **One v3 EPM module**

EPM Activity
 Use **▲** and **▼** to collapse and expand the tree.
 Select any EPM Activities to which this Activity relates.
 Education Plan
 EPM Activity
 EPM Target
 EPM Task

Focus/Target Group

Focus and Target Group are limited to those linked to the Service Team
 (One v4 | Focus | Services | CSS Service Teams Administration)

Activity Focus:
 Use **▶** and **◀** to open and close **Choose Activity Focus**.
 Click **+** to Add the **Available Activity Focus** to the **Selected Activity Focus**.
 Click **X** to Delete **Selected Activity Focus** back to the **Available Activity Focus**.

Target Group:
 Use **▶** and **◀** to open and close **Choose Target Group**.
 Click **+** to Add the **Available Target Group** to the **Selected Target Group**.
 Click **X** to Delete **Selected Target Group** back to the **Available Activity Focus**.

Time/Additional Details

Additional Details:
 Use **▼** drop-down to select **Originator**. Enter **Group Size**.
 Use Calendar **📅** to select date for **Follow Up**
 Select **Booking Status** from **▼** drop-down (**B-Booked / X-Cancelled / C-Completed / P-Provisional**)
 Enter **Travel Miles**.

Total Time 1 Day(s) 10 Hr(s) 30 Min(s).
Non Travel Total Time 1 Day(s) 10 Hr(s) 30 Min(s).
Linked Activity Total Time 0 Day(s) 2 Hr(s) 0 Min(s).
All Total Time 1 Day(s) 12 Hr(s) 30 Min(s).

Activity Time:
 Activity Time Descriptions are set up in **One v4 | Focus | Services | CSS Service Teams Administration | Service Team Definition**
 Double-click on the **Activity Times** **0 Day(s) 0 Hr(s) 0 Min(s)**
 Use the **▲** to set the number of Day(s), Hr(s) and Min(s).
 The **Total Times** will automatically populate.
 Any Times added to **Linked Activities** will be shown here.



Online CSS | My Workload

My Activities | Activity Details

Menu: CSS | My Workload | Activity Details | Linked/Recurring / Memo / UDFs

Linked/Recurring

Activity Details | EPM Activity | Focus/Target Group | Time/Additional Details | **Linked/Recurring**

Linked Activity

New Open Delete

Activity Type	Service Team	Description	Total Time
Meeting	CSS Service		0 Day(s) 2 Hr(s) 0 Min(s)

Linked Activity:
 A **Main Activity** must be saved before you can add a **Linked Activity**.
 Click on a **Heading** to order the columns
 Use the **filter** functionality (RG_OnLine_Common_Filters_Print)

Highlight a Linked Activity and click **Open** to view the details.
 You can **delete** a Linked Activity, the system will ask for confirmation.
 Click **New** to open the **Linked Activity Details**
 (see RG_OL_CSS_Activities_Linked Activities)

Recurring Activity

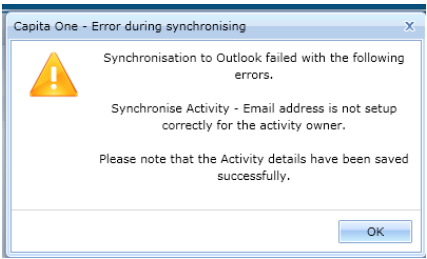
Open UDFs

Click on the **UDFs** buttons to view existing UDFs set up in v4 client

Activity Type	Start Date	Start Time	End Date	End Time	Completed By	Service Team	Description
School Support	10/11/2010	09:00	10/11/2010	10:00	10/11/2010		
School Support	24/11/2010	09:00	24/11/2010	10:00			
School Support	01/12/2010	09:00	01/12/2010	10:00			
School Support	08/12/2010	09:00	08/12/2010	10:00			

Recurring Activity:
 A **Recurring Activity** is set up in **One v4** | Student/Person/ Involvement | **Links** panel | Activities | **Recurrence** button.
 Click on a **Heading** to order the columns
 Use the **filter** functionality (see RG_OnLine_Common_Filters_Print)

Highlight a Recurring Activity and click **Open** to view the details
 You can change an individual Activity of the Recurrence in Online, but you can only change the Recurrence pattern in v4



As you are setting up your Activities you may receive an error relating to the Synchronisation to Outlook; the Activity details **will** have been saved successfully.

Memo

Activity Details | EPM Activity | Focus/Target Group | Time/Additional Details | Linked/Recurring | Link People | **Memo** | UDFs

Memo

Font Paragraph Insert Tools

Font: Arial, 10, Bold, Italic, Underline, Font Color, Background Color, Paragraph: Bulleted List, Numbered List, Indent, Paragraph Style, Insert: Table, Link, Unlink, Print, Tools: Show/Hide Toolbar, Zoom, Print

Memo: The memo allows you to record any relevant information. Use the buttons to format the **Font, Paragraph, Insert** and **Tools**.

You can Show/Hide the **Toolbar**, change the **View**, set the **Zoom** level and **Print**.
 (See RG_Online_Common_UDFs_Memo)

UDFs

Activity Details | EPM Activity | Focus/Target Group | Time/Additional Details | Linked/Recurring | Link People | Memo | **UDFs**

UDFs

Field_Number	0
08. Activity Time	

UDFs: The panel to which the **UDF** was assigned in **One v4** client is identified. It will also list the panels which do have UDFs assigned to them in the same order as the panels in **One v4** and list the UDFs in the order in which they appear within a v4 panel.
 Select the required field and enter the relevant data.
 (See RG_Online_Common_UDFs_Memo)



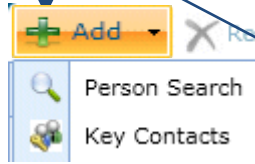
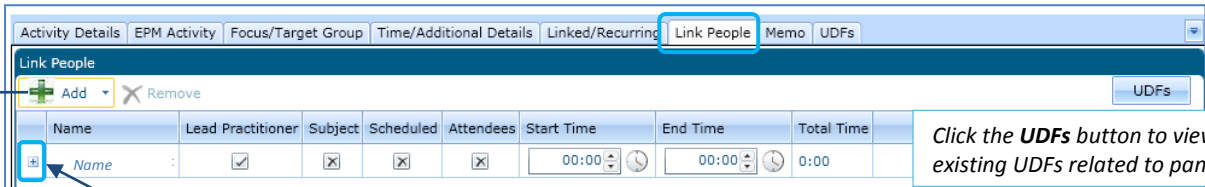
Online CSS | My Workload

My Activities | Activity Details

Menu: CSS | My Workload | Activity Details / Link People

Link People

When you are adding a new Activity the Activity Owner is automatically added as a Linked Person. Any number of people can be linked to an existing Activity; children, staff, parents, carers. When you have linked a person you will then have the opportunity to link **Key Contacts**.



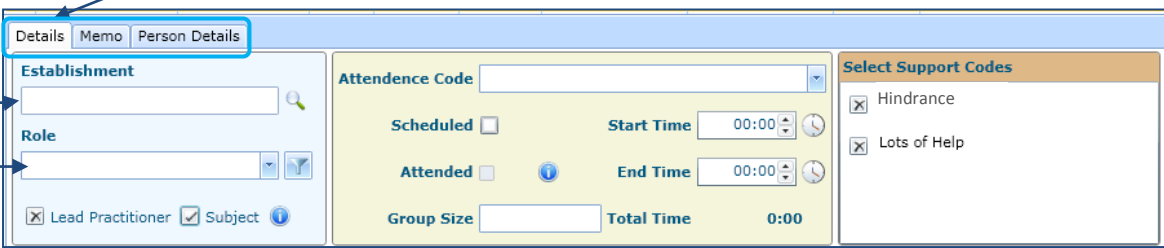
Click **Add** to open the **Person Search** or **Key Contacts** (see *RG_OnLine_Person Search*)

Link People:
 You can click on the Headings (Name and Total Time) to order the columns
 Use or to set **Lead Practitioner**, **Subject** and **Scheduled**.
Attendees are set up in the **+Details**
 Use to set **Start Time** and **End Time**. These can also be changed using
 Click **+** and **-** to open and close the **Details**, **Memo** and **Person Details** (Identifiers, Contact or Student Details and Role/Post Details or School History).

Select an **Establishment** using the **Base Enquiry**.
 Select **Role** from drop-down .
 filter **Role Type**.
 Set **SEN Only** if required.

Select **Attendance Code** from drop-down (defined in *One v4 | Service Team Administration*)
 Set **Scheduled** (to attend) to or
Attended flag can only be set if Activity Date is today or in the past
 Enter **Group Size**.

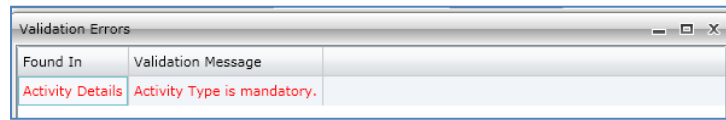
The **Support Codes** available are those of the Service Team to which the Activity Owner belongs and have been selected for the Activity.



A Person can be either **Lead Practitioner** or **Subject**.
 Each Activity can only have one **Lead Practitioner**
 An Activity can have more than one **Subject**.

Use or to set **Start Time** and **End Time** of person's involvement with the Activity.
 The **Total Time** is calculated automatically.

Throughout this process **Validation Errors** may appear as a pop-up to alert you. They detail where the problem lies and what action you need to take before you can **Save the Activity**.



- Related Reference Guides:**
- RG_OL_CSS_MWL_Activities_My Activities
 - RG_OL_CSS_MWL_Activities_Linked Activities
 - RG_OnLine_Person Search
 - RG_Online_Common_Filters_Print
 - RG_Online_Common_UDFs_memo