Setting Up Two Year Old Funding for Local Authorities

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Technical Guide

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You can log a call with the Service Desk via the Web Support 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:

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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 Two Year Old Funding module for use in the One Provider Self Service and One Citizen Self Service portals. The portals are hosted in the One web-tier and therefore the server components are installed by the One Technical Services team. However, there are configuration steps that must be carried out on the mid-tier components as well. For Local Authorities that manage their own mid-tier infrastructure, these mid-tier configuration steps must be carried out by the local IT department. Finally, there are configuration steps that must be completed by a One Administrator via the One v3 Client, One v4 Client and within the Provider and Citizen portals.

IMPORTANT NOTE: *This handbook assumes that you have an existing Citizen Self Service portal and Provider Self Service portal installed. If you do not, please refer to the* Technical Guide - Deploying and Configuring the One Citizen Self Service Portal for Local Authorities *and* Technical Guide - Deploying and Configuring the One Provider Self Service Portal for Local Authorities *documents 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 Two Year Old Funding module. It is assumed that the One Citizen Self Service and One Provider Self Service portals have already been installed by the One Technical Services team. Configuration is required in the One v3 Client, One v4 Client and within the One Citizen Self Service and the One Provider Self Service portals.

Prerequisites

- Existing Citizen Self Service and Provider Self Service portal installations.
- A Two Year Old Funding licence.
- Microsoft SQL Server Reporting Services installed and One Report server configured.

Configuring Two Year Old Funding checklist

For the Two Year Old Funding module, a One Administrator should complete the following tasks:

Step	Where to do it	What to do	Completed
1	**v3 Client**	Install appropriate Two Year Old Funding licence in the v3 client. For more information, see Licensing Two Year Old Funding on page *3*.	☐
2	**v3 Client, Citizen and Provider portals**	If not already done, create a Citizen Portal administrator and a Two Year Old Funding administrator. For more information, see Setting User Permissions on page *4*.	☐
3	**Citizen and Provider portals**	Activate the Citizen Administrator account and Two Year Old Funding administrator account. For more information, see Activating a Provider Portal User Account on page *5*.	☐
4	**v4 Client**	Create an application reference number UDF. For more information, see Create a UDF for the application reference number on page *6*.	☐

Step	Where to do it	What to do	Completed
5	**v4 Client**	Create a second application details UDF. For more information, see Create a UDF for the second applicant details on page *6*.	☐
6	**v4 Client**	Create a placement reference number UDF. For more information, see Create a UDF for the placement reference number on page *6*.	☐
7	**v4 Client**	Create a dummy base. For more information, see Creating Dummy Bases on page *6*.	☐
8	**v4 Client**	Upload Two Year Old Funding SSRS reports. For more information, see Uploading SSRS reports on page *7*.	☐
9	**Citizen Portal**	Enter the base and UDF settings in the Citizen Self Service portal. For more information, see Citizen Portal configuration on page *9*.	☐
10	**Provider Portal**	Enter the required UDF information in the Provider Self Service portal. For more information, see Editing Provider Portal settings on page *12*.	☐

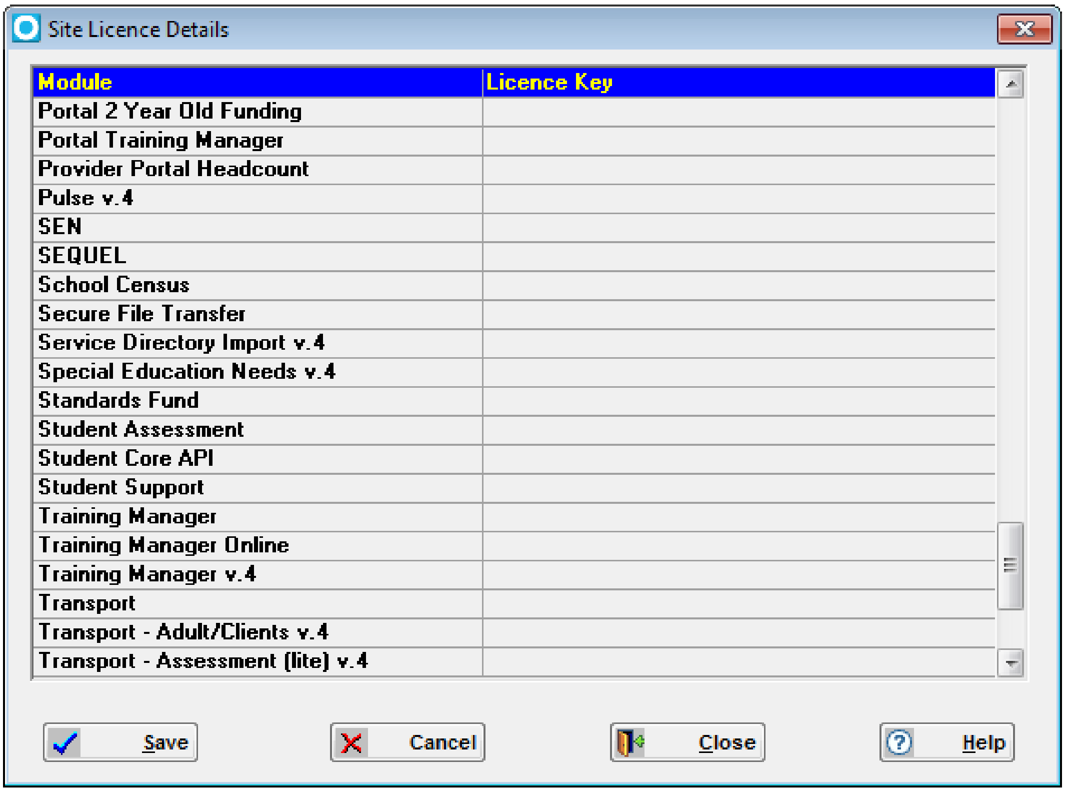
02 | Installing the license

Licensing Two Year Old Funding

To enable the Two Year Old Funding module, you must install the Portal 2 Year Old Funding 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 **Portal 2 Year Old Funding** module.
3. Click the **Save** button.

03 | Setting User Permissions

Setting User Permissions

The Two Year Old Funding module has components in both the Citizen Self Service area and the Provider Portal area. To configure the Citizen Self Service components, you will need administrator access to the Citizen Portal Admin module of v4 Online. To grant users access to the Citizen Portal Admin module, the user must be in a group that has `Read-Write-Delete` permissions to the **Citizen Portal** and **Administration** business processes under the **Citizen Portal** main business process.

All Provider Portal users and administrators, either at the LA or at the provider, must be One users created in the v3 Client and have a valid email address recorded against them. After being created, users should be added to the relevant groups in v3. For the Two Year Old Funding, Capita have provided groups with the appropriate permissions already assigned. To complete the configuration tasks outlined in this document, the user should be a member of PP TYOF Site Adm group. Alternatively, they can be a member of any group that has `Read-Write` permissions to the **TYOF Site Administrator** business process under the **Provider Portal** main business process. The following table summarises the predefined Provider Portal user groups.

Group Name	Description
PP TYOF CC User	Prov Prtl TYOF Children Cntr User – A member of staff at a children's centre who can make Two Year Old Funding applications. Users at a children's centre cannot submit placements.
PP TYOF Fund Man	Provider portal TYOF Funding Manager – A person at the LA who processes Two Year Old Funding requests and can run reports.
PP TYOF Prov Usr	Provider Portal TYOF Prov User – A person at a funded services provider who can make Two Year Old Funding applications as well as submit placements.
PP TYOF Site Adm	Provider Portal TYOF Site Administrator – A person at the LA who can configure the Two Year Old Funding configuration options and the general Provider Self Service portal settings (site logo, edit text lables, etc). They cannot process incoming requests or run reports.

MORE INFORMATION:
RG_Permissions_User Group Permissions available from My Account.

Creating a Portal User Account

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

1. Set up the user in One v3 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 must 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 Two Year Old Funding

Creating the Two Year Old Funding UDFs

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

Create a UDF for the application reference number

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

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

Field Name: TYOFAPPREF

Field Label: Portal TYOF Application Reference

The value of the field name will be entered into the later in the configuration process.

Create a UDF for the second applicant details

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

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

Field Name: TYOFSECAPP

Field Label: Portal TYOF Application Second Applicant Details

The value of the Field Name will be needed later in the configuration process.

Create a UDF for the placement reference number

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

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

Field Name: TYOFPLAREF

Field Label: Portal TYOF Placement Reference

The value of the Field Name will be needed later in the configuration process.

Creating Dummy Bases

To import 2YOF applications from the Citizen Self Service portal, a dummy base must be created as a B2B:Student Base and a user must be mapped to the dummy base to identify that a record has been received from the Citizen Self Service portal.

The User_ID is used to update the **Last Updated** field in the relevant area of One, identifying that the record originated from the Citizen Self Service portal.

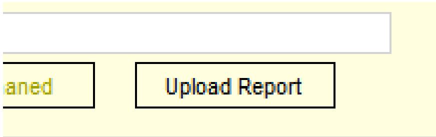
The base can be created in the v4 Client via **Focus | Bases | Base Definition** or in v4 Online Bases module.

When making applications for Two Year Old Funding all child, parent/carer and address details are passed to the Portal Back office for matching to existing records in One. In order to distinguish the data originated from the portal from other data submitted from within the portals, all Two Year Old Funding applications are assigned to the “dummy” base within One.

Use the v4 One Bases module to create a base for use within the Two Year old Funding processes. Make a note of the Base ID values for the configured bases for use later in the configuration process.

Uploading SSRS reports

Applicants who make applications with the help of a Provider portal user (for example, a staff member at a children’s centre) can state how they wish to be contacted if they log a help request or make a non-economic application. If they choose post, a letter will be generated by the system when the application is approved, rejected or further information is requested. For these letters to work, the reports must be uploaded and configured in your SSRS server. To upload these reports you will need to log onto your report server and open the CCSServerConfig.exe tool.

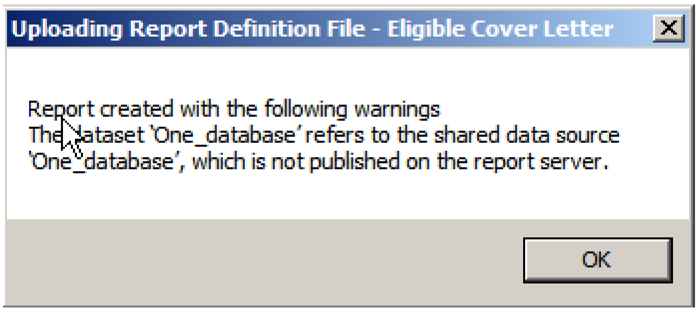


> ***IMPORTANT NOTE:** If you have One PRIME installed, before your funding mangers can run reports, the PP TYOF Fund Man user group must be granted `Permit` access to the Utilities user group permission folder. The permission is granted in the v4 Client via **Tools | Permissions | User Group Permissions** and is in the `All Secured Service` permissions folder.*

On the **Report Server** tab use the **Upload Report** button to upload each of the following files found in the reports server Report Definition Repository:

- Report Definition Repository\Portal Reports\Tyof\Eligible Cover Letter.rpt
- Report Definition Repository\Portal Reports\Tyof\Rejected Cover Letter.rpt
- Report Definition Repository\Portal Reports\Tyof\Request Information Letter.rpt

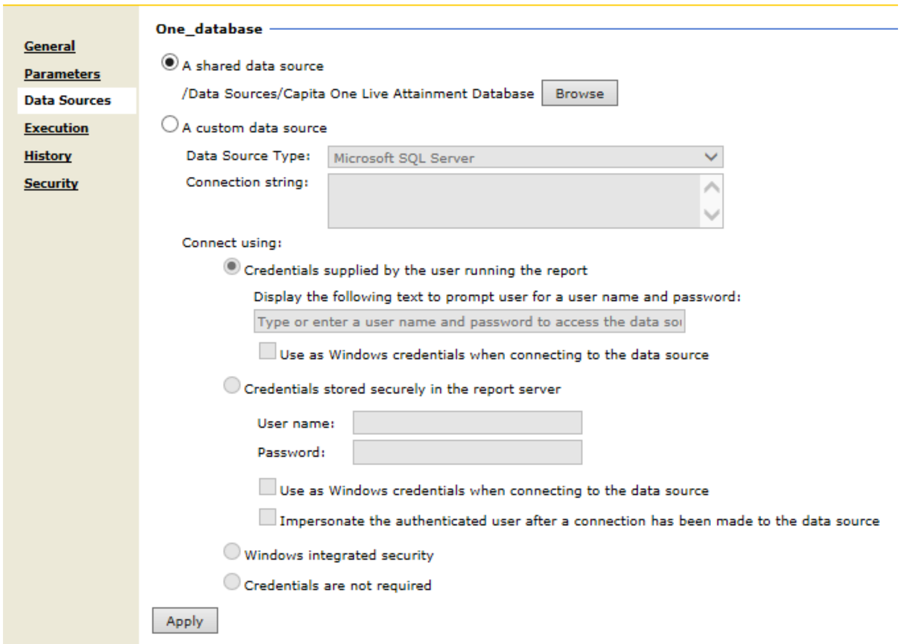
If you receive the error below dismiss it.



If you encounter any other unexpected errors, contact the One Support Desk.

Once you’ve uploaded the reports, navigate to the reports manager for your SSRS instance and locate the three uploaded reports in the folder “User Defined Reports”. Use the interface to move the reports to ‘/Portal Reports/Tyof/’

Lastly, for each report navigate to the **Properties** screen for the report and change its **Data Source** to one that is pointing to your live Capita One database. The screenshot below shows how the Data Source can be changed to a shared source called ‘/Data Sources/Capita One Live Attainment Database’



These reports can be edited using the SSRS.

05 | Citizen Portal configuration

Overview

To enable the Citizen Portal and Provider Portal to communicate with each other and process Two Year Old Funding applications, several options in the Citizen Portal must be configured. To configure the settings within the Citizen Self Service Portal, you must be a Citizen Portal Administrator.

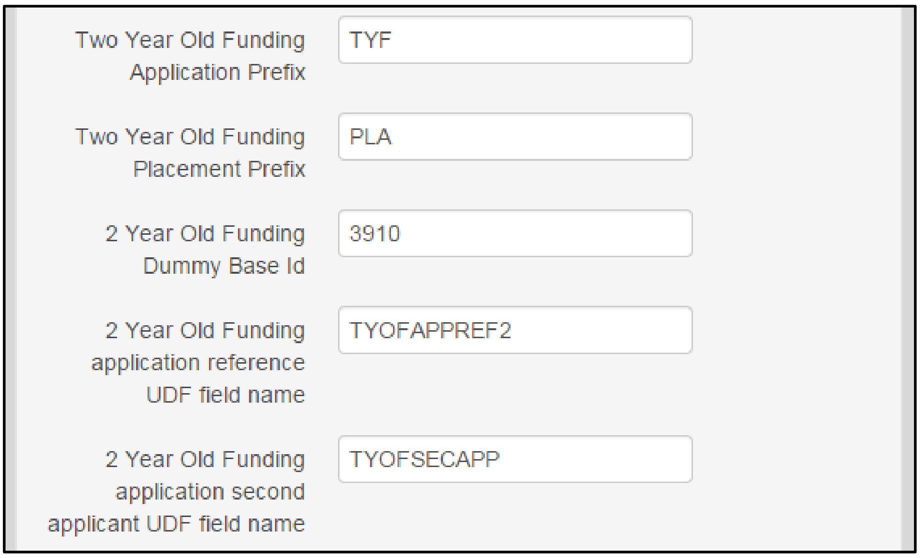
Editing Application Settings

The **Application Settings** section is used to store settings used when submitting applications via the Citizen Portal and Provider Portal. The following table describes each setting related to Two Year Old Funding and provides a brief description.

Field Name	Description
Two Year old funding application prefix	The prefix applied to all application reference numbers generated by the Citizen Portal during a Two Year Old funding application or by the Provider Portal during an Assisted Application.
Two Year Old funding Placement prefix	The prefix applied to all placement reference numbers generated by the Provider Portal when providers submit a notification of Placement.
Two Year Old funding Base Id	The Id of the base used when importing Two Year Old Funding applications into One (the Dummy Base Id was created earlier in this document)
Two Year Old Funding application reference UDF field name	The name of the UDF created and added to the Student Details entity. This field was created earlier in this document.
Two Year Old Funding application second applicant UDF field name	The name of the UDF created and added to the Student Details entity. This field was created earlier in this document.

To edit the settings, complete the following procedure:

1. Log in to One v4 Online as a Portal Administrator and click the **Citizen Portal Admin** button to display the **Citizen Portal Home** page.
2. From the **Administration** menu, select the **Configure Portal Settings** option to display the **Site Settings** page.
3. Navigate to the **Application Settings** area. The following graphic displays the relevant fields.



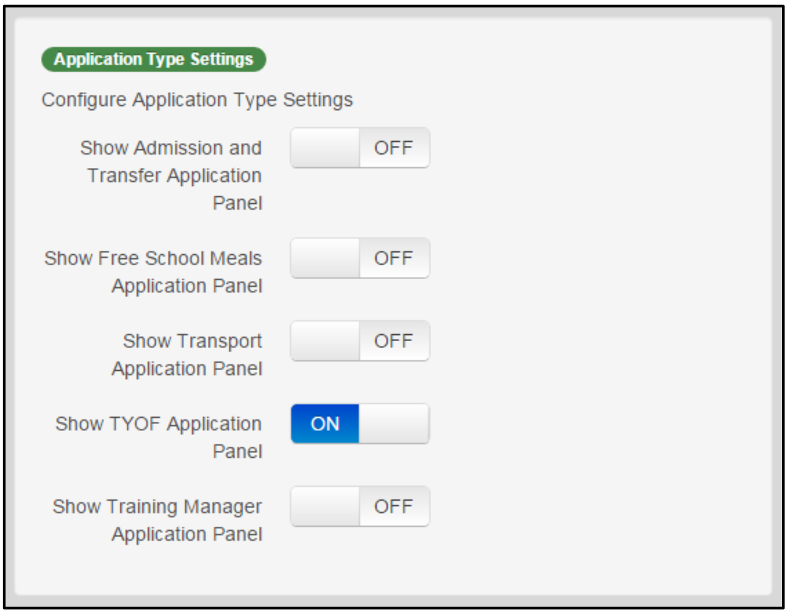
4. Enter the details for the Two Year Old funding base ID and UDFs you created earlier in the v4 Client earlier.
5. Click the **Save** button.

Editing Application Type Settings

The **Application Type Settings** section controls the availability of the application panels within the Citizen Portal.

To enable Citizen Portal users to make Two Year Old Funding applications, complete the following procedure:

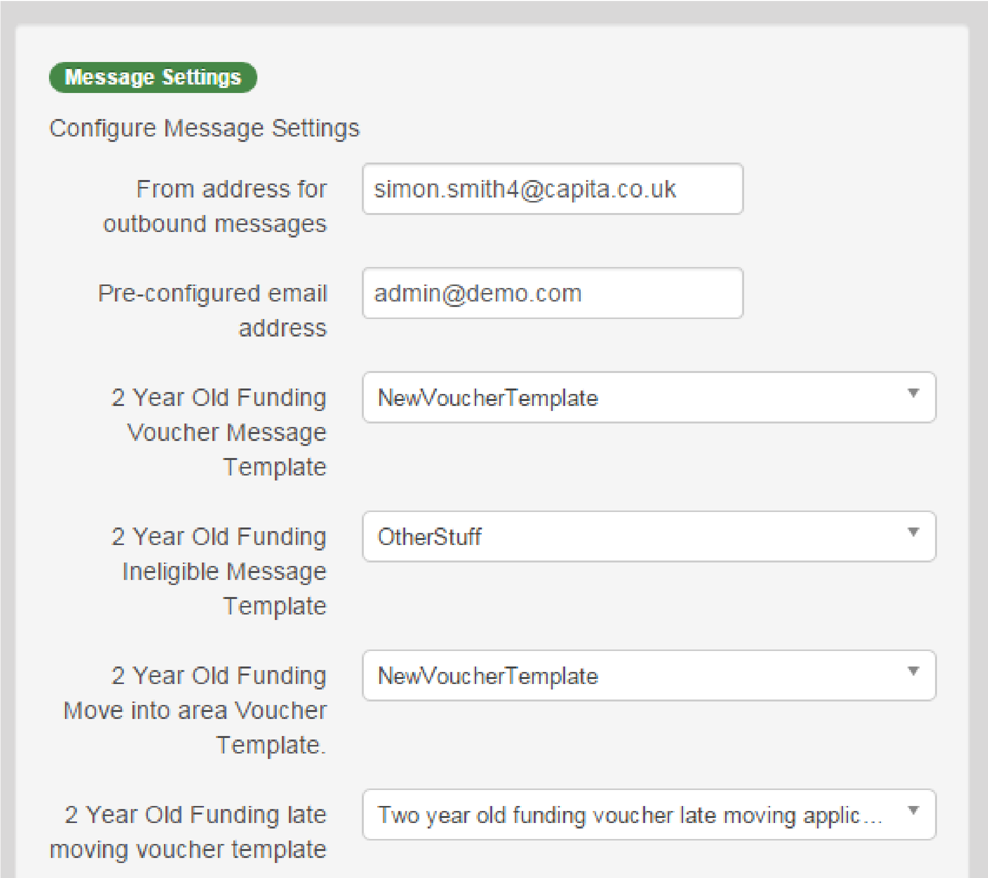
1. Log in to One v4 Online as a Portal Administrator and click the **Citizen Portal Admin** button to display the **Citizen Portal Home** page.
2. From the **Administration** menu, select the **Configure Portal Settings** option to display the **Site Settings** page.
3. Navigate to the **Application Type Settings** section.



4. Click the **Show TYOF Application Panel** button to enable Two Year Old Funding applications to be made from the Citizen Portal.
5. Click the **Save** button.

Editing Message Settings

The **Message Settings** section contains configuration settings relating to messages sent from the portals. It contains four configuration settings relating to the templates used when processing Two Year Old funding applications. There are default letters assigned, but a Two Year Old Funding administrator should customise them before using the system. For more information on message templates, refer to the *Template Management* topic of the *General Administration* chapter in the *One Two Year Old Funding Citizen Portal* handbook, available from the One Publications website (http://www.onepublications.com).



06 | Provider Portal configuration

Overview

To complete the Two Year Old Funding configuration, you must log in to the Provider Self Service portal as a Two Year Old Funding administrator and complete the following tasks.

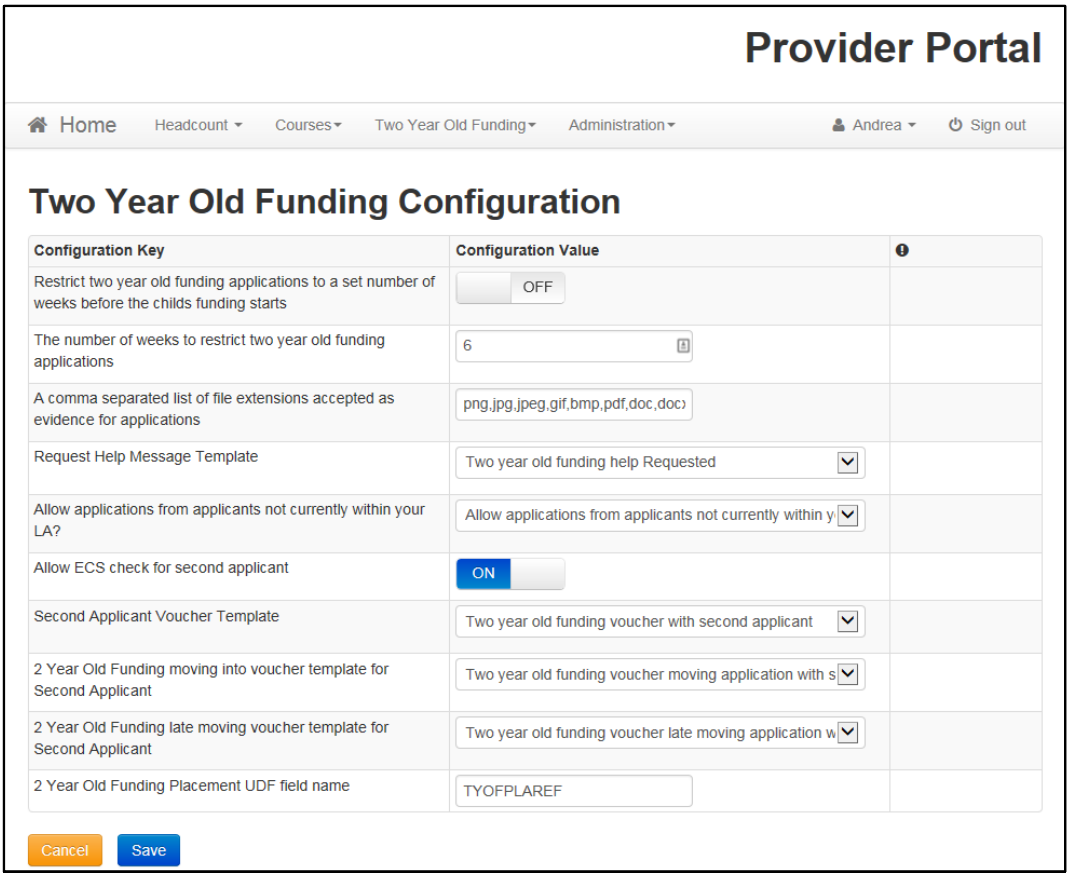
Editing Provider Portal settings

The **Two Year Old Funding Configuration** page stores settings used throughout the Two Year Old Funding module. The settings can be edited by any Two Year Old Funding administrator and should be edited to suite the LA's requirements. Although you can edit any of the values, when first configuring the module, only the **2 Year Old Funding Placement UDF field name** is required.

Field Name	Description
Restrict two year old funding applications	Set this to **On** if you wish to restrict the applications to a set number of weeks before a child's eligibility date.
Number of weeks to restrict two year old funding applications	If set to **On**, this number dictates the number of weeks to restrict applications by.
File extensions accepted as evidence for applications	This is a list of file extensions that are accepted as evidence for Non-Economic Two Year Old funding applications.
Request Help message template	The message template used when an applicant requests help following a Not Found ECS Result.
Allow applications from applicants not currently within your LA	Dictates how the system will deal with applications from those living outside your Local Authority area.
Allow ECS check for second applicant	Dictates whether users can use a second applicant's details to perform an ECS check.
Second Applicant Voucher Template	The message template to use when an application is found eligible using a second applicant's information.
Moving into area voucher for second applicant	The message template used when an application is found eligible with a second applicant's information and the applicant is moving into your Local Authority area.
Late Moving into area voucher for second applicant	The message template to use when an application is found to be eligible immediately (late application) with a second applicant's information and the applicant is moving into your Local Authority area.
Two Year Old Funding Placement UDF field name	The name of the UDF created and added to the Student Details entity. This field was created earlier in this document.

To edit the settings

1. Log in to the Provider Self Service portal as a Two Year Old Funding administrator.
2. From the **Two Year Old Funding** menu, select the **General** option under the **CONFIGURATION heading to display the Two Year Old funding Configuration page.**



4. Edit the fields as required. Ensure you enter the details for the **2 Year Old Funding Placement UDF field name**.
5. Click the **Save** button.

07 | What Next?

Administration

The initial configuration of the Two Year Old Funding module is now complete. However, before using the system, a Two Year Old Funding administrator should customise the other settings within the Citizen and Provider portals as required, including templates and field descriptions. If required, additional two year old funding users and administrators should also be created.

More Information: *One Two Year Old Funding Citizen Portal* handbook *One Two Year Old Funding Provider Portal* handbook Both documents are available from the One Publications website (http://www.onepublications.com)

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