



# One IYSS System Administration Handbook

last updated for the Spring 2019 release

Handbook

**CAPITA**

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# 01 | Document Change Control

Date	Release	Description
Spring 2019		<p><b>New Sysadmin system value for connectivity</b></p> <p>The Youth Justice Board have changed the way Connectivity works with the introduction of a new system value called: "YJB Connectivity YJSM Web Service URL".</p> <p>For more information, see <a href="#">Appendix 1: System Values</a> on Page 17</p>
		<p><b>Security Group permissions for Case Transfers</b></p> <p>New permissions for Case Transfer will be visible in the sys-admin tool but <u>should NOT be invoked</u></p> <p>See <a href="#">YJ Case Transfer</a> on page 215.</p>

# 02 | Maintaining the One IYSS System

## Backup

Even if you are not directly responsible for data backup in your organisation, you should be aware of the data backup policy. This should form an integrated part of your disaster recovery plan. To ensure that the system and all information stored on it are preserved in the event of a failure, you should ensure that the policy covers the following points:

- Frequency
- Rotation
- Retention
- Location
- Supporting hardware and software.

### Frequency

How often you back up the system depends on how much data you are prepared to lose in the event of a failure requiring full system restoration.

### Rotation

You should ensure that you can restore data from a variety of points in time. It may be necessary to restore data as it was at a certain month or year end, or in the event of the most recent backup failing. An example rotation period may take the following form:

	Rotation Period
Monday - Thursday	Weekly
Friday	Monthly
Period End	Stored in accordance with retention policy

### Retention

Backups should be stored for predetermined lengths of time in accordance with company and legal policies. It must comply with audit rules specified by financial legislation, the Data Protection Act (1998), and any contractual obligations that involve the information held. As new contracts are acquired, backup retention should be reviewed to ensure contractual and auditory obligations are met.

### Location

It is recommended that backup media and supporting software is held off-site in a secure and fireproof safe. This should be easily accessible in the event of a disaster or failure.

### Supporting Hardware and Software

Your retention policy is likely to exceed the lifespan of your hardware, operating systems, backup agents, and back office products such as the Oracle server, and the current version of One IYSS. As specified in your retention policy, you must retain all supporting software and backup hardware, such as DAT drives, for the duration of the backup media retention.

## Capacity Planning

As the database grows it will require more hard drive space. The capacity of your hardware and bandwidth must be monitored and recorded regularly over time to identify any indicatory trends and ensure it remains fit for purpose. As part of your capacity planning regime, you should monitor the following:

- Hard drive space on all servers assigned to One IYSS (Oracle, document, and .net servers).
- CPU and memory usage on all servers assigned to One IYSS (Oracle, document, and .net servers).
- Bandwidth.

## Administrative Monitoring

One IYSS uses scheduled jobs to perform a number of administrative functions, including processing statistical data, system maintenance and upkeep and sending messages to and from clients. These jobs should be reviewed periodically to verify that they are running as scheduled. You can set up email notifications to alert you to any failures in the process. In the event that the scheduled jobs do not run as planned, please contact One Application Support.

Confirm with your implementation team where the executable and configurable files for each job have been installed, and which scheduling tool has been used.

The following scheduled jobs should be regularly monitored:

### DX

The DX job executes any import or export requests that have been entered in the One IYSS web application through the DX Monitoring functionality (**my homepage | IYSS Links | DX Monitoring**). The DX job can be run throughout the day. When submitting new tasks to run as part of the DX job, users must determine whether that task is to be run with the next DX job, or with the first DX job after the time specified in the One IYSS System Administration Client (**System Values | DX Start Time**).

add dx job my homepage | clients | providers | opportunities | ys activities log out

my homepage > dx jobs > add dx job Service: Connexions

**Add DX Job** continue

Template:

<input type="radio"/> Client Base Line Statuses	<input type="radio"/> Client Intended Destinations	<input type="radio"/> Client Qualifications
<input type="radio"/> Education Starters and Leavers	<input type="radio"/> Import Postcode - Generic Data	<input type="radio"/> Import Postcode - LEA Data
<input type="radio"/> Opportunity - Vacancy Export	<input type="radio"/> SCYPG Export	<input type="radio"/> Training Starters and Leavers
<input type="radio"/> YJB MIS Export		

Description:

Run Immediate:

Yes - the job will run next time the DX scheduled job runs (this is setup by each individual company ask your administrator for the schedule).

No - the job will run next time the DX scheduled job runs after DX Start Time which is currently set at 12:00

continue

The DX job executes caaspdxw.exe. The server and database to which the DX job connects is configured in the **Connection Strings** section of the caaspdxw.exe.config file.

**NOTE:** It is recommended that the job be run daily at 22:15hrs.

### AspireMX

Users can send SMS and email messages through One IYSS to which clients can respond. Messages are held until the AspireMX job runs. When the job runs it processes both inbound and outbound messages, and appends them to the respective client record. Any inbound

messages that cannot be traced to a particular client record by the system are forwarded to the MX Administrator email address. The MX Administrator email address is configurable in the One IYSS System Administration Client (**System Values | MX - Administrator Email Address**).

The AspireMX job executes caaspmxs.exe. The server and database to which the job connects is configured in the **Connection Strings** section of the caaspmxs.exe.config file.

For more information, see [Messaging Facility Management](#) on page 99.

**NOTE:** It is recommended that the job runs hourly.

## MXReminders

When set up by users, automated messages are sent to clients by SMS to remind them of upcoming appointments. These messages are sent when the MXReminders job runs.

The MXReminders job executes caaspmxs.exe in reminder mode 'caaspmxs-r'. The server and database to which the job connects is configured in the **Connection Strings** section of the caaspmxs.exe.config file.

**NOTE:** It is recommended that the job be run daily at 09:30hrs.

## Clean Up

This job performs the following overnight tasks:

- Unlocks persistently locked client records.
- Calculates client ages.
- Clears down any temporary tables.
- Sets clients' lead local authority based on CCIS residency rules (outlined in the *Statistics and XML* manual).
- Reworks geographic groupings that have been marked as Needs Generating. For more information, see [Geographic Identifiers - Postcode to Local Authority](#) on page 53.
- Assigns the managing team to the lead worker's default workgroup for all clients if the Clean Up - Update Clients Team to Lead Worker Team system value is set to '1' (true).

The Clean Up job executes the Oracle Stored Procedure <dataset|\_IYSS.SPCLEANUP01.

**NOTE:** It is recommended that the job be run daily at 22:30hrs.

## Statistical Output Counter with Audit

This job extracts a snapshot of data into a separate table (tbBeanBag) from which the NCCIS stats return is prepared (outlined in the *Statistics and XML* manual). Successful completion of this job is a prerequisite for creating the monthly government returns. It automatically runs the Clean Up job to ensure critical data is current prior to execution.

The Statistical Output Counter with Audit job executes the Oracle Stored Procedure <dataset|\_iyss.spBeantotals\_ConnexionXML01.

**NOTE:** The Statistical Output Counter with Audit job must be run on the last day of every month.

## Tidy Net Sessions Job

The Tidy Net Sessions job reviews expired sessions and:

- Creates real interactions from unfinished or unsaved current interactions.
- Unlocks any client records that remained locked.
- Deletes the browser session.

## Maintaining the One IYSS System

This ensures that a session's interactions are not lost should the session expire before the user has updated the record in question. Sessions are set to expire after a certain period of inactivity. The length of this period is configurable in the One IYSS System Administration Client (**System Values | Interaction Timeout Minutes**).

The Tidy Net Sessions job executes catidyns.exe.

**NOTE:** It is recommended that the job be run hourly.

### Key Clients Update Job

This job sends emails to all users who have requested key client updates. These emails inform users of any changes made to clients they have marked as key clients. Users receive a single email containing a list of new updates each time the job is run. The job will also add updated clients to the **Key Clients** panel of **my homepage** according to individual user and client settings.

Before enabling this job, please ensure that the following system values are up to date:

- **IYSS.net Base URL:** This is the One IYSS URL used in generating direct links to client records.
- **Key Client Update Sender Address:** This is the email address of the account that sends the Key Client Update emails to users.
- **SMTP Server:** This is the outgoing email server for the Key Client Update Sender Address.

The Key Clients Update job executes cakeyclu.exe. The server and database to which the job connects is configured in the Connection Strings section of the file caaspmxs.exe.config.

**NOTE:** It is recommended that the job be run daily at 22:00hrs.

### Job Schedule Reference Table

The following table provides you with a recommended schedule of when the jobs should be run:

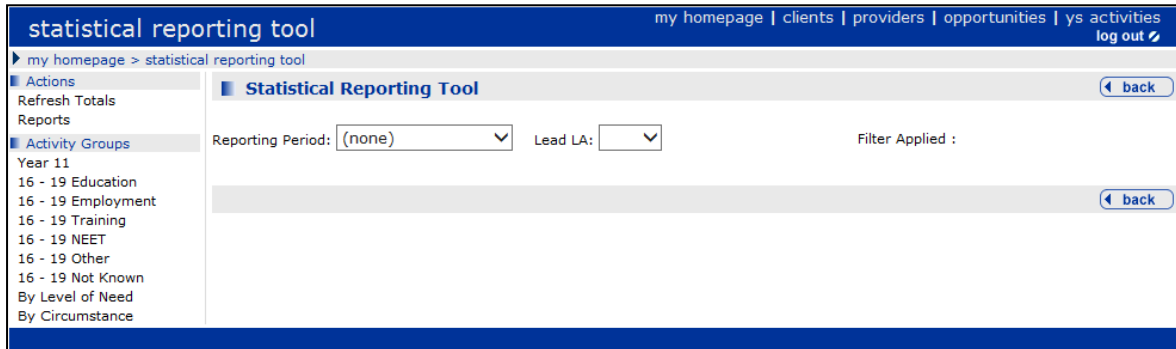
Job	Recommended run schedule	Recommended time
AspireMX	Hourly	
Tidy Net Sessions Job	Hourly	
MX Reminders	Daily	09:30
Key Clients Update Job	Daily	22:00
DX Monitoring	Daily	22:15
Clean Up	Daily	22:30
Statistical Output Counter with Audit	Last day of the month	After Clean Up is complete, finishing before midnight.

## Statistical Reporting Tool

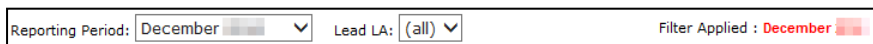
The statistical reporting tool is accessed through the One IYSS web application.

To run a statistical report:

1. In the **IYSS Links** panel of **my homepage**, click the **Statistical Reporting Tool** hyperlink to display the **Statistical Reporting Tool** screen.



2. Select the **Reporting Period** from the drop-down.
3. To filter the data by a single lead authority, select the required LA from the **Lead LA** drop-down.
4. In the **Actions** panel, click **Refresh Totals** to update the selected filters.



5. In the **Activity Groups** panel, click the desired client grouping to display the results.

XML Code	Line Description	Intensive Support	Supported	Minimum	Total
<b>Young People: 16 - 19 By Level Of Need</b>					
	Clients 16-19 - Currency Expired	0	2	39	41
1	13-16 Interventions - One to One Contact	0	0	0	0
1	16-19 Interventions - Other	0	0	0	0
1	16-19 Interventions - One to One Contact	0	0	0	0
1	13-16 Interventions - Other	0	0	0	0

## One IYSS Environment

There are five key elements of One IYSS. These are detailed in the following table:

Server	Description
Oracle Server	This server holds and runs the database element of One IYSS.
Document Server	This server stores all user-accessible documents that are attached to client records, document templates and Crystal Reports. It can operate from the same drive as the Oracle server.
One IYSS Web Server	This is the One IYSS web application. It provides and processes requests from the One IYSS browser client. It also works with the One IYSS application server to retrieve and update data, and generates the HTML/Javascript that form the user interface.
One IYSS Application Server	This server supports the One IYSS web application. It retrieves and updates data from both the One IYSS and the One databases.

## Maintaining the One IYSS System

Server	Description
One Application server	This is the Capita v4 Application Server for data shared by One IYSS and One, or for One data that is available on a read-only basis in One IYSS. The One IYSS Application Server accesses the One database through this server.

## 03 | Using the One IYSS System Administration Client

### Accessing the One IYSS System Administration Client

The One IYSS System Administration Client is linked to your network login. The system recognises you based on your network login ID.

To log in:

1. Launch the One IYSS System Administration Client to display the **OneIYSS System Administration Login** dialog.

2. Enter your One IYSS **Password**.
3. Select the requested **Memorable Data** characters from the drop-downs.
4. Click the **OK** button.

### Configuring One IYSS Using the System Administration Client

**WARNING:** Misconfiguration of the One IYSS System Administration Client can cause system failure. If you need to make any changes to the system and are unsure how they will affect the performance of One IYSS, check with One Application Support prior to carrying out the changes.

*This is of particular importance for all system values, and any values coloured **red**.*

The One IYSS System Administration Client enables the configuration of all elements of One IYSS, including:

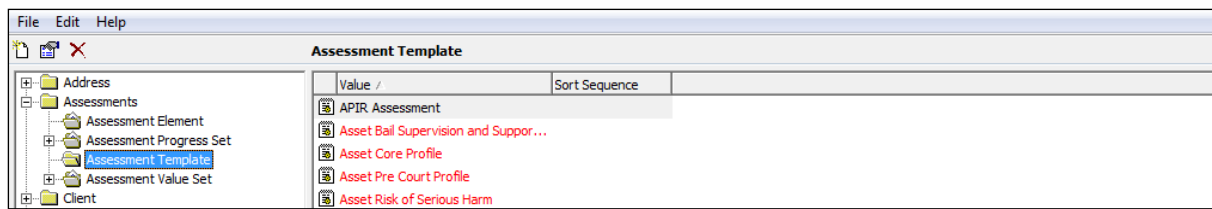
- Setup and maintenance of user accounts
- Security matrix and access controls
- Values of lookup fields, radio buttons and multiple choice fields
- Connections to external resources, e.g. email and SMS service providers
- One IYSS data mapping to NCCIS specified code structures
- Setup of statistical reporting periods
- Importing bespoke Crystal Reports and search result templates
- Unlocking locked Client, Opportunity and Provider records
- Roll up of academic years for clients.



## Using the One IYSS System Administration Client

System administration updates should be done methodically. It is recommended that all changes be documented to facilitate fault identification in the event errors are made.

Changes to values within the One IYSS System Administration Client are performed through the three icons above the system administration directory tree.



These icons allow values to be added, changed, or deleted. Where an action is unavailable, the icon is greyed out to prevent the value being altered.

 *Add Value icon*

 *Change Value icon*

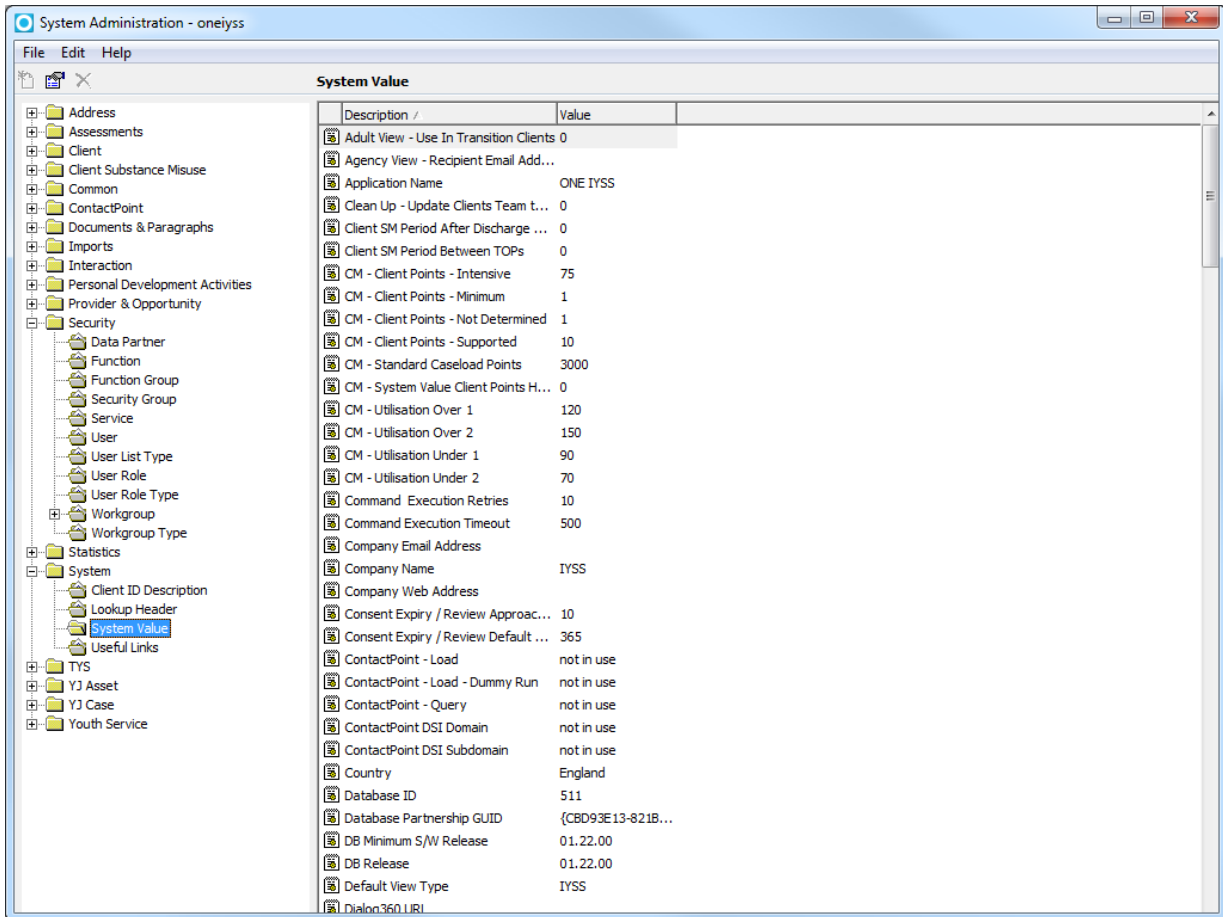
 *Delete Value icon*

When a value is being added, the dialog contains a **Description** and a **Long Description** field. While both are mandatory fields, the **Long Description** is the one displayed in the One IYSS web application.

Mandatory fields in One IYSS System Administration dialogs are displayed in **bold** until a value has been entered. These must be completed.

## Configuring System Values

The central values within One IYSS are for the most part defined by system values. To adjust these in the One IYSS System Administration Client, select **System | System Value**. The values are displayed in the **System Value** pane.



To edit a value, click the appropriate entry to display the **System Value** dialog. For guidance on editing these values, see [Appendix 1: System Values](#) on page 166.

**WARNING:** Misconfiguration of system values can result in system failure. If you are unsure how any changes you make to the system values will affect the system stability, please contact One Application Support prior to making the changes.

## URL for YJB Connectivity.

The Youth Justice Board have changed the way Connectivity currently works. A new system value “**YJB Connectivity YJSM Web Service URL**” have been introduced to hold the URL of the YJB connectivity hub. To obtain the correct URL required to configure this setting you will need to contact YJB.

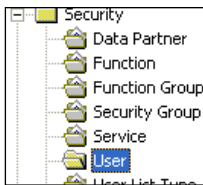
# 04 | Managing User Accounts

**IMPORTANT NOTE:** It is essential that a process is put in place for One IYSS system administrators to be notified when a user starts, leaves, moves teams or jobs or changes their name. If not, accounts could become outdated and increase potential for unauthorised access to client data.

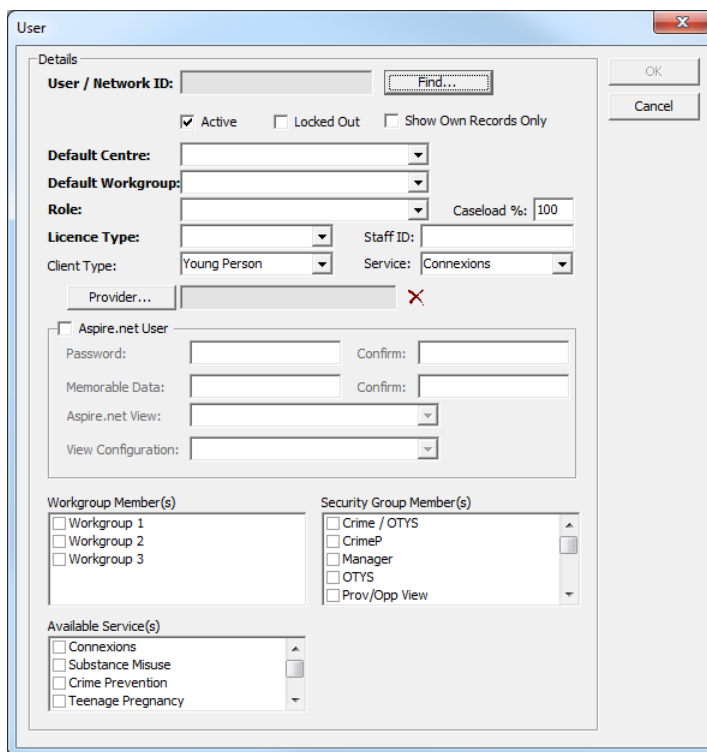
## Creating New User Accounts

To create a new user account:

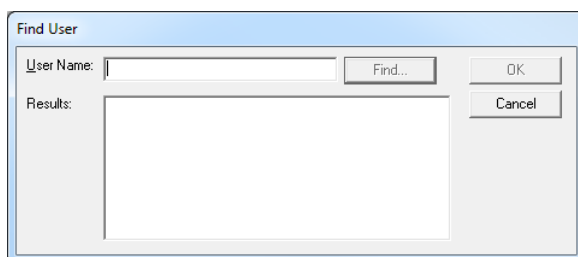
1. In the One IYSS System Administration Client, select **Security | User** to display all users in the system.



2. Click the **Add Value** icon to display a blank **User** dialog.



3. Click the **Find** button to display the **Find User** dialog.



4. In the **User Name** field, enter the name of the required person.
5. Enter the **User Name** and click the **Find** button to display a list of matching One users.
6. From the **Results** field, select the required person.
7. Click the **OK** button to return to the **User** dialog.

**NOTE:** If the user does not appear in the **Results** field, you should contact your Capita One System Administrator to create a Capita One account for the person.

8. Ensure the **Active** check box is selected.
9. If you are creating the account in advance, select the **Locked Out** checkbox. You will need to deselect this before the user can access the account.
10. Ensure the **Show Own Records Only** check box is deselected.
11. As appropriate, complete the remaining fields. For field-specific instructions, refer to the following table.
12. Click the **OK** button to save the record and close the dialog.

Field	Instruction
<b>Default Centre</b>	Select the centre to which the user is attached User interactions will be assigned this centre unless otherwise indicated. For more information, see <a href="#">Centres</a> , on page 50.
<b>Default Workgroup</b>	Select the workgroup to which the user is assigned. User interactions will be assigned this workgroup unless otherwise indicated. For more information, see <a href="#">Workgroups</a> , on page 22.
<b>Role</b>	Select the user's role from the drop-down. This determines the lists in which they appear throughout the system. For more information, see <a href="#">User Roles</a> , on page 25.
<b>Caseload</b>	Enter the caseload percentage the user should be allocated, e.g. 50% for a part-time user working a half week, 150% for a .lead worker with a lot of allocated clients but who has limited active contact with them.
<b>Licence Type</b>	Select the user's employment status from the drop-down. This field is for reference only and has no functional use.
<b>Staff ID</b>	If required, enter the user's organisational ID, e.g. payroll number. This enables the matching of One IYSS data to that of external sources.
<b>Client Type</b>	Select the type of clients with which the user works.
<b>Provider</b>	If the user is a WEX School Administrator, enter the school at which they work.
<b>Aspire.net User</b>	To setup access to the One IYSS web application, select this checkbox to activate the <b>Password</b> , <b>Memorable Data</b> , <b>Aspire.net View</b> and <b>View Configuration</b> fields.
<b>Password / Confirm</b>	If required, enter a password the user will use to log in to the One IYSS web application the first time they access the system. The passwords entered in both fields must match and conform to organisational password policy. When the user logs in with this password, they are prompted to change it.

Field	Instruction
<b>Memorable Word / Confirm</b>	If required, enter a memorable word the user will use to log in to the One IYSS web application the first time they access the system. The memorable words entered in both fields must match and conform to organisational policy. When the user logs in with this memorable word, they will be prompted to change it.
<b>Aspire.net View</b>	If the user is an Aspire.net user, select Integrated View from the drop-down.
<b>View Configuration</b>	If the user is an Aspire.net user, select the service for which the user works. This tailors the structure of client records to that particular service's needs.
<b>Workgroup Member(s)</b>	Select all workgroups to which the user belongs. Ensure the user's default workgroup is selected. Adding additional workgroups enables the user to attribute work to the appropriate team.  For more information, see <a href="#">Workgroups</a> , on page 22.
<b>Security Group Member(s)</b>	Select all security groups that hold security permissions the user needs. The user automatically gains security privileges for all groups selected.  For more information, see <a href="#">Security Groups</a> , on page 27.
<b>Available Service(s)</b>	Select all services to which the user needs access. This enables the user to update the records of all selected services without needing a login for each one.  For more information, see <a href="#">Services</a> , on page 30.

## Unlocking a User Account

User accounts can be intentionally locked out, if users are not ready to access their accounts, or can become locked out through incorrect password entry. In both cases the unlocking process is the same.

1. To unlock a user account:
2. In the One IYSS System Administration Client, select **Security | User** to display all users on the system.
3. Double click the required user record to display the **User** dialog.
4. Deselect the **Locked Out** check box.
5. Click the **OK** button to save the changes and close the dialog.

**NOTE:** The numbers of times users can enter incorrect passwords before being locked out is configurable in the One IYSS System Administration Client (**System | System Value | Security - Failed Login Attempts to Lock Out**).

## Resetting Security Details

If users lock out their account or forget their password or memorable word, you may need to reset their login details. After you have assigned them a new password or memorable word, they must log in with the new details and then create a new password or memorable word.

To reset security details:

1. In the One IYSS System Administration Client, select **Security | User** to display all users on the system.
2. Double-click the required user record to display the **User** dialog.

3. If required, deselect the **Locked Out** check box.
4. To reset the password, enter one of the following words into both **Password** and **Confirm** fields:
  - Mechanic
  - Assistant
  - Waitress
  - Engineer
  - Labourer
  - Musician
5. To reset the memorable word, enter one of the following words into both **Memorable Data** and **Confirm** fields:
  - Fitter
  - Barber
  - Driver
  - Actress
  - Tailor
  - Porter
6. Click the **OK** button to save the changes and close the dialog.

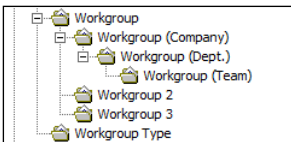
# 05 | Workgroups

Workgroups identify users' organisational units or teams, enabling access to client records to be tailored to team requirements. It also identifies the managing teams for different clients, providers and opportunities, and attributes interaction work to the appropriate sources. For more information on how workgroups interact with client types, see [Centres](#) on page 50.

Workgroups can be organised hierarchically to reflect your organisation. There are three default levels of workgroup type:

- Company (level 2)
- Department (level 1)
- Team (level 0).

A company workgroup can contain a number of department workgroups. Department workgroups can contain a number of team workgroups.

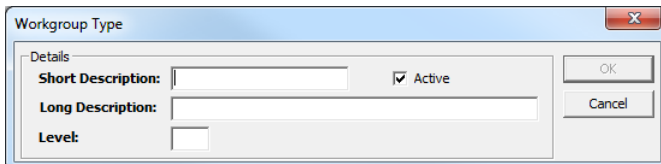


## Configuring Workgroup Types

You can configure the workgroup types to fit your organisation. You can change, delete or add new types depending on your organisational structure.

To add or change a workgroup type:

1. In the One IYSS System Administration Client, select **Security | Workgroup Type**.
2. Click the **Add Value** icon or double-click an existing value to display the **Workgroup Type** dialog.



3. Enter a description in the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Enter the **Level** (0 being the lowest).
6. Click the **OK** button to save the changes and close the dialog.

## Configuring Workgroups

Workgroups can be used to limit user access to certain client records depending on the organisation or organisational unit they represent. Restrictions can be put in place to limit access to records of one or several managing teams, a single data partner or a single provider, e.g. a workgroup containing workers for a particular school (provider) could be granted access only to the records of clients of that school.

To configure a workgroup:

1. In the One IYSS System Administration Client, select **Security | Workgroup**.
2. Click the **Add Value** icon or double-click an existing value to display the **Workgroup** dialog.

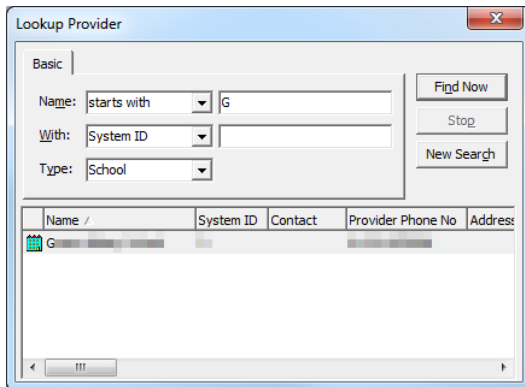
3. Enter a name for the workgroup in the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Ensure the **Default** check box is deselected.
6. Select the appropriate **Workgroup Type** from the drop-down.
7. If the workgroup belongs to a larger organisational unit or division, select the **Parent Workgroup** from the drop-down.
8. To manually control the client records the workgroup can access, select the **Restrict Access To Clients** check box.
9. To limit access to client records with certain managing teams, select the appropriate teams from the **Managing Team** list.
10. To limit access by data partner permissions, select the appropriate partner from the **Data Partner** drop-down. For more information, see [Data Partner Permissions](#) on page 29.
11. To limit access by a particular current situation provider:
  - a. Click the **Provider** button to display the **Lookup Provider** dialog.

- b. Complete the **Name**, **With** or **Type** fields.



## Workgroups

- c. Click the **Find Now** button to display a table of matching results.



- d. Double-click the required provider to select it and return to the **Workgroup** dialog.
12. Click the **OK** button to save the changes and close the dialog.

## 06 | User Roles

User roles indicate job titles or departments. This enables users to be grouped by role for security and reporting. It also determines the user lists in which they appear.

User roles are used in conjunction with user list types and user role types. If you make any additions to the user role list you should enter the new addition into the appropriate user list types and user role types.

### Creating a New User Role

To create a new role:

1. In the One IYSS System Administration Client, select **Security | User Role**.
2. Click the **Add Value** icon to display the **User Role** dialog.

3. Enter a name for the user role in the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Ensure the **Default** check box is deselected.
6. Click the **OK** button to save the changes and close the dialog.

**NOTE:** A user role must be linked to a user role type before it can be selected for use within a user account.

### User Role Types

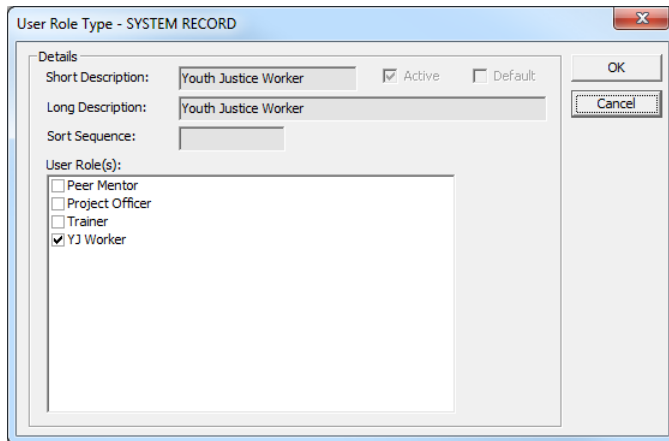
User role types group role types for use where role-based security is active and for intervention statistics. User role types cannot be added or deleted.

To configure the user roles assigned to user role types:

1. In the One IYSS System Administration Client, select **Security | User Role Type**.

## User Roles

2. Double-click the required user role type to display the **User Role Type** dialog.



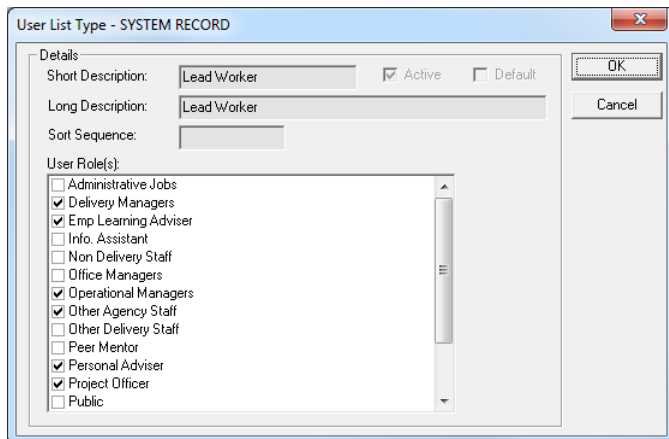
3. Select or deselect the appropriate check boxes in the **User Role(s)** list.
4. Click the **OK** button to save the changes and close the dialog.

## User List Types

User list types determine which users are displayed in the different user lists within One IYSS. This is done by assigning user roles to the appropriate user list types. User list types cannot be added or deleted.

To configure the user list types:

1. In the One IYSS System Administration Client, select **Security | User List Type**.
2. Double-click the required user list type to display the **User List Type** dialog.



3. Select or deselect the required **User Role(s)**.
4. Click the **OK** button to save the changes and close the dialog.

# 07 | Security Groups

A security group is a specific set of One IYSS permissions related to a particular job role, service or user type. Users can belong to several security groups, and hold the permissions contained by each one. This means you can create a basic security group applicable to all or certain groups of users, and then create smaller, more specific security groups to which you can add users as necessary.

## Example:

You might have a standard security group that enables all users to access the information in client records. If you only want certain users to be able to change this information, you can create a security group with only change permissions (you do not need to reassign all the standard permissions to this group). If you want to restrict the ability to delete records to a strict few, you can create a further security group with only delete permissions (you do not need to reassign all the standard and change permissions to this group). Users belonging to all three security groups are able to access, change, and delete client records.

## Creating a Security Group

To create a new security group:

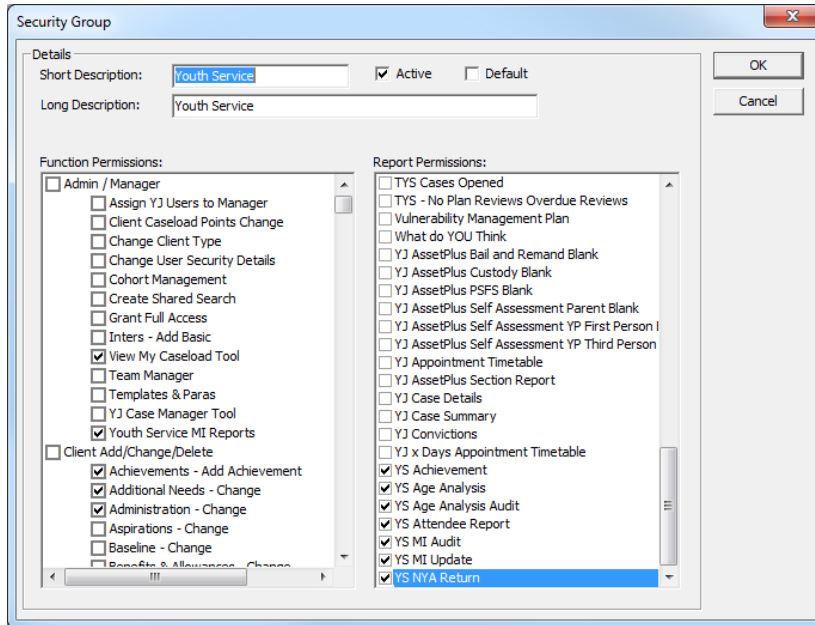
1. In the One IYSS System Administration Client, select **Security | Security Group**.
2. Click the **Add Value** icon to display the **Security Group** dialog.

3. Enter a name or description for the security group in the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Ensure the **Default** check box is deselected.
6. Select the appropriate check boxes in the **Function Permissions** and **Report Permissions** panels. For more information on the different function permissions, see [Appendix 3: Security Permissions](#) on page 207.
7. Click the **OK** button to save the changes and close the dialog.

## Editing Security Group Permissions

To edit a security group:

1. In the One IYSS System Administration Client, select **Security | Security Group**.
2. In the **Security Group** panel, double-click the required group name to display the **Security Group** dialog.



3. Select or deselect the appropriate check boxes in the **Function Permissions** and **Report Permissions** panes. For more information on the different function permissions, see [Appendix 3: Security Permissions](#) on page 207.
4. Click the **OK** button to save the changes and close the dialog.

## 08 | Data Partner Permissions

Data Partner Permissions (DPPs) are used alongside security groups and the information entered into client records to restrict user access to records. Client records containing a DPP can only be accessed by users with a corresponding DPP.

To create a new DPP:

1. In the One IYSS System Administration Client, select **Security | Data Partner**.
2. Click the **Add Value** icon to display the **Data Partner** dialog.

3. Enter a name for the DPP in the **Short** and **Long Description** fields, e.g. the name of the agency accessing the client records.
4. Ensure the **Active** check box is selected.
5. Ensure the **Default** check box is deselected.
6. Click the **OK** button to save the changes and close the dialog.

# 09 | Services

Each business area is implemented using a Service in One IYSS. If your system extends beyond Information, Advice and Guidance (IAG) and Youth Work services to include services dealing with sensitive data, you will need to configure services to ensure users only access information they are authorised to view. Service types include:

- IAG
- Youth Service
- Adult
- Substance Misuse
- Teenage Pregnancy
- Crime Prevention/Anti-social Behaviour
- Other targeted youth support.

If required, you can have multiple instances of each service type, however the permissions are associated with the service types, not service instances. User access to information is based on these service type permissions and their current service.

The way data items are controlled by the service matrix depends on the type of service to which they belong. The following table shows the data items controlled by the service matrix for different services.

Service	Data items controlled
IAG and Youth Service	Interactions Documents Notes Assessments
TYS services	Interactions Documents Notes Assessments Referrals In Young Person Characteristics Cases Assessments//Plans/Reviews Referrals Out

Service	Data items controlled
Substance Misuse	Interactions Documents Notes Assessments Referrals Substance Misuse Characteristics Episodes Treatments Treatment Outcome Profiles

IAG and Youth Service data items are available to users of all services, providing users can access the appropriate section of client records.

Interactions, documents, notes and assessments for related services can be displayed automatically or with a filter. This is configured in the matrix data.

Data can be edited by users of all services with the appropriate permissions providing they can access the data through the matrix. TYS, SEN and Substance Misuse data are owned by the service of the user that created the particular case or episode.

Services can share appropriate data with other services.

The following matrix shows how data sharing might look on a system:

		Sharing Data With					
		Connexions	Crime Prevention	Other TYS	Substance Misuse	Teenage Pregnancy	Youth Service
Data Owner	Connexions	✓	✓	✓	✓	✓	✓
	Crime Prevention		✓				
	Other Detached YW		✓	✓	✓	✓	
	Substance Misuse				✓		
	Teenage Pregnancy				✓	✓	
	Youth Service	✓	✓	✓	✓	✓	✓

## Service Configuration

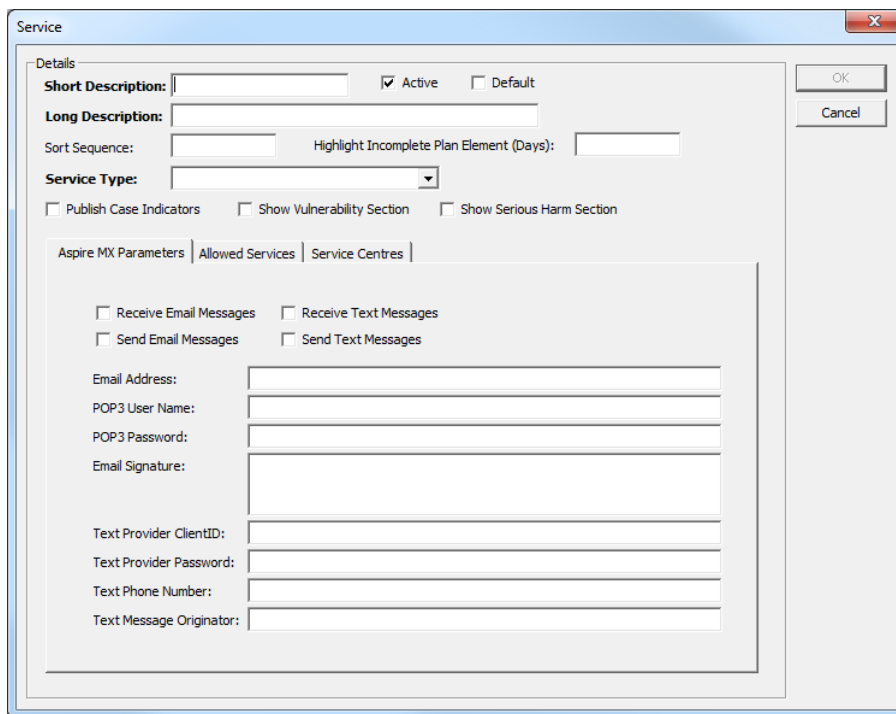
To configure a service:

1. In the One IYSS System Administration Client, select **Security | Service**.



## Services

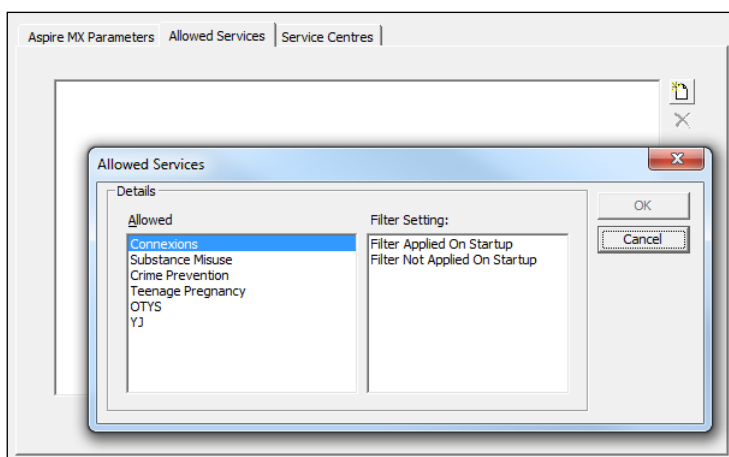
- Click the **Add Value** icon to display a blank **Service** dialog.



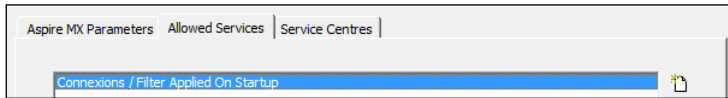
- Enter a name for the service in the **Short** and **Long Description** fields.
- Ensure the **Active** check box is selected.
- Ensure the **Default** check box is deselected.
- Select the required **Service Type** from the drop-down.
- Complete the **Highlight Incomplete Plan Element (Days)** field. For an explanation of this field, see the table after step [11](#).
- As required, complete the fields under the **Aspire MX Parameters** tab. For an explanation of each of these fields, see table after step [11](#).
- To enable data sharing with other services:

**NOTE:** You must add allowed services individually. To add multiple allowed services, repeat the following steps for each new service.

- In the **Allowed Services** tab, click the **Add Value** icon to display the **Allowed Services** dialog.

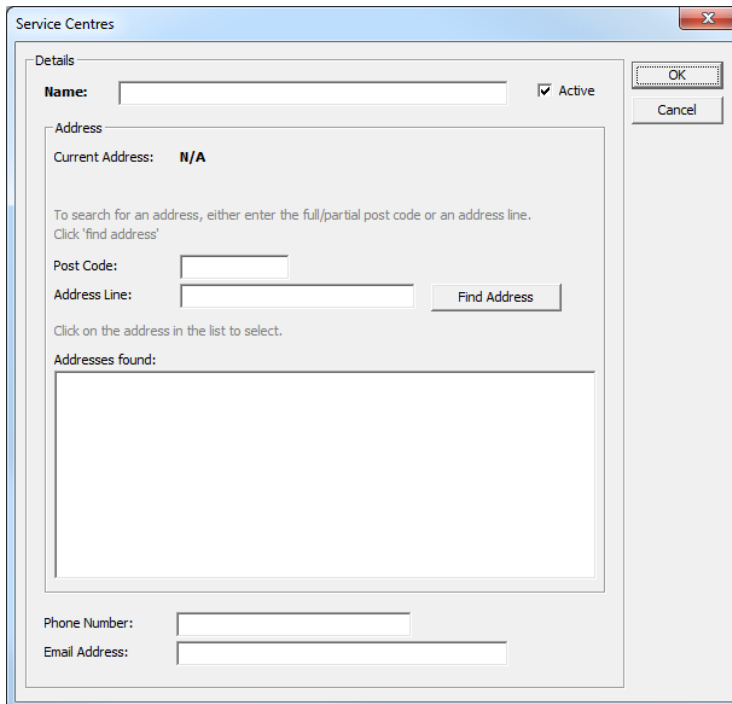


- b. In the **Allowed** list, select the required service.
- c. To enable users to control what information is displayed, select the **Filter Applied On Startup** option in the **Filter Setting** list.
- d. To automatically display shared information, select the **Filter Not Applied On Startup** option in the **Filter Setting** list.
- e. Click the **OK** button to close the dialog and add the service to the **Allowed Services** tab.

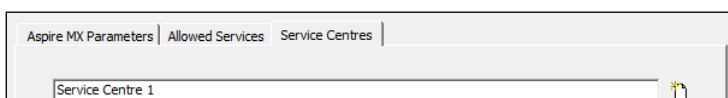


10. To add a new service centre:

- a. In the **Service Centres** tab, click the **Add Value** icon to display the **Service Centres** dialog.



- b. Enter a **Name**.
- c. Ensure the **Active** check box is selected.
- d. To add an address for the service:
  - i. Complete the **Post Code** and **Address Line** fields.
  - ii. Click the **Find Address** button to display a list of matching addresses in the **Addresses found** list.
  - iii. Select the address.
- e. If known, enter the **Phone Number**.
- f. If known, enter the **Email Address**.
- g. Click the **OK** button to close the dialog and add the service to the **Service Centres** tab.



11. Click the **OK** button to save the changes and close the dialog.

Field	Explanation
<b>Highlight Incomplete Plan Element (Days)</b>	<p>Only for use with enhanced assessments. Elements of the plan are highlighted in different colours depending on their level of completion at n days before the target end date.</p> <p>“Status = complete” is green. (Status is complete)</p> <p>“Status &lt;  complete, target end date  = n days in the future” is green. (Status is incomplete, but end date is above a set number of days away.)</p> <p>“Status = in progress, target end date &lt; n days in the future” is amber. (Status is in progress and end date is below a set number of days away.)</p> <p>“Status &lt;  complete, target end date not in the future” is red. (Status is incomplete and target end date has passed.)</p>
<b>Publish Case Indicators</b>	<p>This displays the case indicators to other users. The case indicators are displayed in the <b>Professional Contacts</b> and <b>Referrals</b> section. These indicators are only used for Substance Misuse, Teenage Pregnancy, Crime Prevention, and Other Detached Youth Work service types.</p>
<b>Show Vulnerability Section</b>	<p>This makes the <b>Indicators of Vulnerability</b> section available in the <b>Case Details</b>. These indicators are only used for Substance Misuse, Teenage Pregnancy, Crime Prevention, and Other Detached Youth Work service types.</p>
<b>Show Serious Harm Section</b>	<p>This makes the <b>Indicators of Serious Harm to Others</b> section available in the <b>Case Details</b>. These indicators are only used for Substance Misuse, Teenage Pregnancy, Crime Prevention, and Other Detached Youth Work service types.</p>
<b>Receive Email Messages</b>	<p>Enables the service to receive email messages through the system.</p>
<b>Send Email Messages</b>	<p>Enables the service to send email messages through the system.</p>
<b>Receive Text Messages</b>	<p>Enables the service to receive text messages through the system.</p>
<b>Send Text Messages</b>	<p>Enables the service to send text messages through the system.</p>
<b>Email Address</b>	<p>This is the email address used for processing email sent and received by this service.</p>
<b>POP3 User Name</b>	<p>This is the POP3 account that processes emails for the registered email address.</p>
<b>POP3 Password</b>	<p>This is the password for the POP3 account that processes emails for the registered email address.</p>
<b>Email Signature</b>	<p>This is a signature automatically added to all emails sent through this service. You do not need to include a signature.</p>
<b>Text Provider Client ID</b>	<p>This is the ID issued by TextAnywhere for the account processing text messages for this account.</p>
<b>Text Provider Password</b>	<p>This is the password for the TextAnywhere account used with this service.</p>
<b>Text Phone Number</b>	<p>This is the phone number provided by TextAnywhere through which clients can contact you by text message.</p>

Field	Explanation
<b>Text Message Originator</b>	This is only used for reminder messages. It informs recipients from whom the text message originated, and must be at least three characters long.

# 10 | Record Locks

Whenever a client, opportunity or provider record is being changed by a user, One IYSS locks the record to prevent other users attempting to make simultaneous alterations. An error message is displayed to any other users attempting to update the record.

The client you are trying to update is in use by █████ █████ in oneiyss.  
To continue use the navigation options above or click the browser's back button.

After the user changing the record has finished and moved to another record or logged off, the record is unlocked.

The Tidy Net Session job unlocks all records that did not unlock at the end of users sessions. This job should be scheduled to run hourly. For more information, see [Administrative Monitoring](#) on page 10.

Occasionally records remain locked and require you to manually unlock them. This may be because:

- The user closed the browser without logging out of One IYSS.
- The user's system crashed and the user could not log off.
- The Tidy Net Session job has failed or is not running to the recommended schedule

If the problem is caused by users failing to correctly log off, you should inform offending users and make them aware of the correct way to end a session. If the problem is caused by a system crash, the cause of the crash should be investigated, if possible replicated, and the results communicated to One Application Support.

If you are experiencing an increasing number of locked records, you should check that the Tidy Net Session job is running as scheduled. Even if the issue is caused by one of the users or system error, the Tidy Net Sessions job should still unlock affected records on an hourly basis. If there is an issue with the job, report the problem to One Application Support.

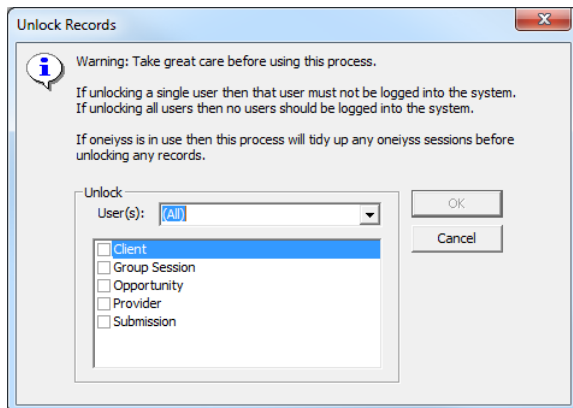
You can unlock records in the One IYSS System Administration Client or in the One IYSS web application.

## Unlocking a Record using the One IYSS System Administration Client

To manually unlock a record using the One IYSS System Administration Client:

1. Contact the user to whom the record is locked to ensure that they have logged out of the system.

- After the user has logged out, in the One IYSS System Administration Client select **File | Unlock Records** to display the **Unlock Records** dialog.



- From the **User(s)** drop-down, select the appropriate user.

**WARNING:** Do not select the **(All)** option.

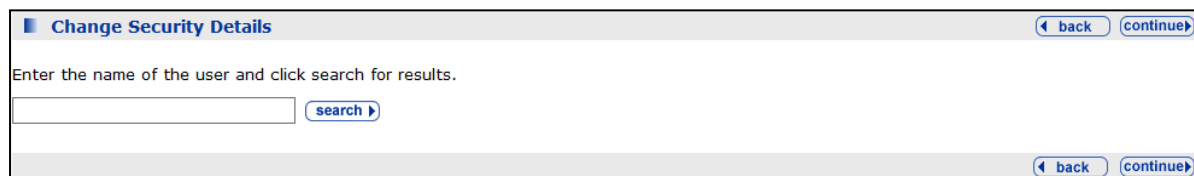
- Select the type of record that needs unlocking.
- Click the **OK** button to save the changes and close the dialog.

## Unlocking a Record through the Web Application

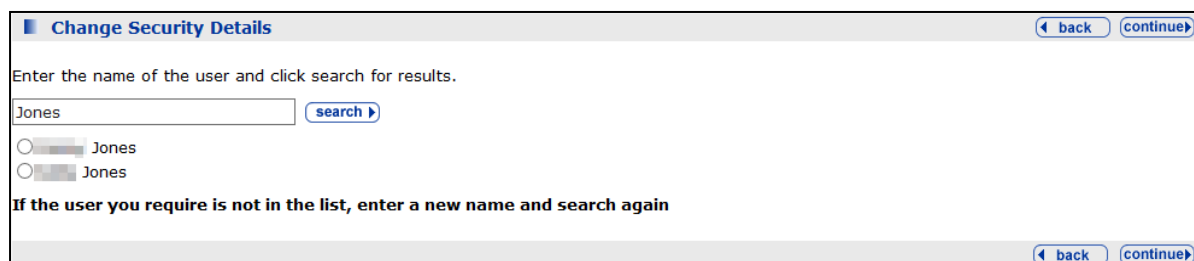
This function is governed by the User Security Details permission.

To unlock the records:

- Contact the user to whom the record is locked to ensure that they have logged out of the system.
- After the user has logged out, in the **IYSS Links** panel on **my homepage**, click the **User Security Details** hyperlink to display the **Change Security Details** page.



- Enter the name of the user in the search field.
- Click the **search** button to display the matching results.



- Select the required user.

## Record Locks

- Click the **continue** button to display the security details below the results list.

The screenshot shows a web form titled "Change Security Details" with a "back" button on the left and a "continue" button on the right. The form contains the following elements:

- Instruction: "Enter the name of the user and click search for results."
- Text input field containing "Jones" and a "search" button.
- Two radio button options, both labeled "Jones". The first is selected.
- Text: "If the user you require is not in the list, enter a new name and search again"
- Two empty text input fields.
- Section heading: "Unlock Records"
- Warning text: "Warning: Make sure the user is logged out of the system before proceeding. This process will tidy up any sessions before unlocking records."
- Three checkboxes: "Client", "Provider", and "Opportunity", all of which are currently unchecked.
- Navigation buttons: "back" and "continue" at the bottom right.

- Under the **Unlock Records** heading, select the required check box.
- Click the **continue** button. The records are unlocked and you are taken back to **my homepage**.

# 11 | Configuring Lookups

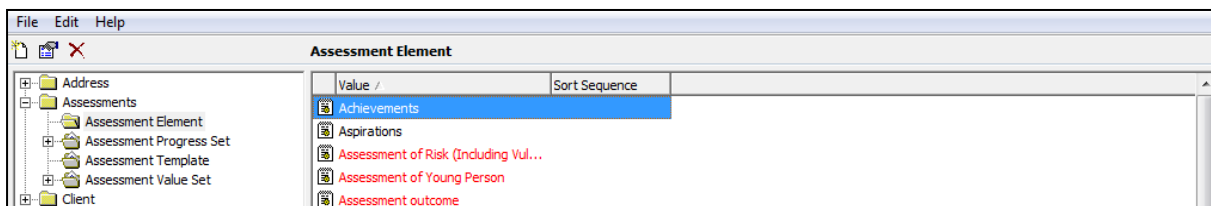
## Introduction

**WARNING:** You should *always* run changes through your test system before applying them to your live system. Any questions or issues that arise during the test period can be rectified by contacting One Application Support.

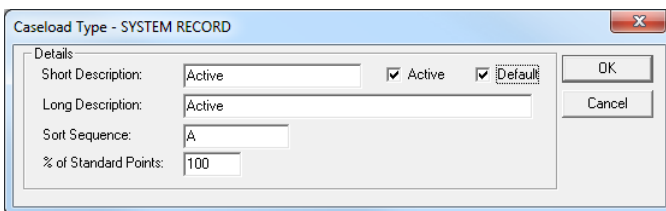
Lookups are options that are displayed as lists, check boxes, radio buttons and drop-downs throughout One IYSS. There are two types of lookup:

- Simple lookups, values that exist in isolation.
- Complex lookups, values that interact with other lookups through links (e.g. groups and sub groups), or through rules and calculations that enable the creation of new values and information (e.g. the points system that enables the comparison of different qualification levels).

Certain lookups relate to system records. These inform other areas of the system and cannot be deleted. System record values are displayed in red. If you need to change a system record lookup, you must ensure that you are not affecting statutory reporting. It is recommended that you contact One Application Support before changing these values.



System record lookups are also identified by the “ - SYSTEM RECORD” addition to the dialog name:



**IMPORTANT NOTE:** If you change the description of a lookup, you should make a note of the original description. This aids problem resolution if any issues arise with the lookup following the change.

### More Information:

Configuring Complex Lookups: [Complex Lookups](#), page 42.

Configuring Simple Lookups: [Simple Lookups](#), page 41.

Lookup Tables: [Appendix 2: Lookup Tables](#), page 178.

For lookups to be displayed in the system, the **Active** check box in the lookup dialog must be selected. If you are creating a lookup in advance of its implementation in the system, you should deselect the **Active** check box, and then select it to enable the lookup at a later date. If you deactivate or delete a lookup value you should update affected data. This must be done where the lookup field is mandatory or used for statutory reporting.



## Configuring Lookups

The **Default** check box should normally be deselected unless otherwise stated. The Geographic Area lookup is the exception to this. Selecting the **Default** check box for a Geographic Area lookup value automatically populates all **Geographic Area** fields with the value entered into the lookup.

Lookup field changes only take effect in One IYSS after the Oracle Server and the IIS Server have synchronised. As this generally happens overnight, changes are only displayed the following day. Security element changes, such as security groups, workgroups and alterations to non-text fields in user accounts, take immediate effect.

**IMPORTANT NOTE:** Before adding a new value to any lookup field that forms part of the NCCIS Data Catalogue, One Application Support must be consulted. Values in these fields must be mapped against an NCCIS code to prevent errors from appearing in the NCCIS XML file.

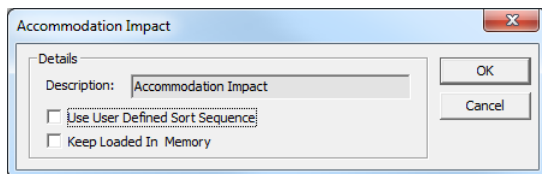
## Sort Sequences

### Configuring the Lookup Header

To determine whether the values held in each lookup are sorted by the system or by System Administrator-defined sort sequences, you must update the lookup header.

To configure how lookup values are sorted:

1. In the One IYSS System Administration Client, select **System | Lookup Header**.
2. Double-click the required lookup to display the following dialog:



3. To sort the values using defined sort sequences, select the **Use User Defined Sort Sequence** check box.

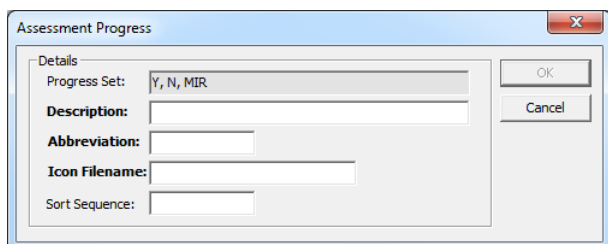
**NOTE:** Not all lookup values are compatible with user-defined sort sequences. Where this is the case, the check box is unavailable.

4. Click the **OK** button to save the changes and close the dialog.

### Configuring the Sort Sequence

The **Sort Sequence** field in lookup dialogs enables you to determine the order in which the values are displayed. Certain value sets have an internal order, and are not just groups of discrete values. If you want to display the values in these sets according to their internal order, you can enter a value in the **Sort Sequence** field to determine where they are displayed in the list.

Sort Sequences are configured in the individual lookup value dialogs in the One IYSS System Administration Client.



For example, the N,S,M,Q,V value set is a set of association ratings.

Address	Value /	Sort Sequence
Assessments	Moderate Association	c
Assessment Element	Not Associated at all	a
Assessment Progress Set	Quite Strongly Associated	d
Assessment Template	Slight Association	b
Assessment Value Set	Very Strongly Associated	e
N, S, M, Q, V		
P, N, G, S, C		

When it is sequenced by strength of association (denoted in the **Sort Sequence** field), it has the following order:

Address	Value	Sort Sequence /
Assessments	Not Associated at all	a
Assessment Element	Slight Association	b
Assessment Progress Set	Moderate Association	c
Assessment Template	Quite Strongly Associated	d
Assessment Value Set	Very Strongly Associated	e
N, S, M, Q, V		
P, N, G, S, C		

## Simple Lookups

All simple lookups are maintained in the same manner. Values in red are core system record lookups and cannot be deleted.

To configure a simple lookup:

1. In the One IYSS System Administration Client, expand the parent folder of the required lookup by clicking the + next to the folder icon.
2. Select the required lookup to display the current values in the **Value** column.

Address	Value	Sort Sequence /
Connexions Partnership	Across All Areas	
Geographic Grouping Type	Area 1	
Geographical Area	Area 2	
TEC Area		

3. Click the **Add Value** icon to create a new value, or double-click an existing value to edit it. The lookup value dialog is displayed.

4. Complete the **Short** and **Long Description** fields.
5. Ensure the **Active** check box is selected.
6. For the Geographical Area lookup only: To automatically populate **Geographical Area** fields with this lookup value, select the **Default** check box.
7. Click the **OK** button to save the changes and close the dialog.

## Complex Lookups

### Introduction

Complex lookups perform different functions within the system. This section explains how to configure them in One IYSS.

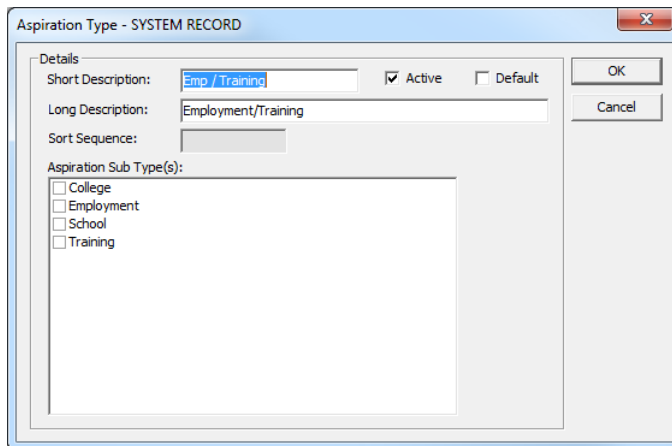
### Aspiration Types

**NOTE:** *Aspiration types can interact with aspiration subtypes. Changes should not be made to these values without prior consultation with One Application Support.*

If you only use high level data, aspiration types can exist without being linked to aspiration subtypes. Where it is to be linked to subtypes, these must be created before changes are made to the aspiration type.

New aspiration types cannot be created. To edit an existing type:

1. In the One IYSS System Administration Client, select **Client | Aspiration Type**.
2. In the **Value** column, double-click the required type to display the **Aspiration Type** dialog.



3. If required, edit the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. In the **Aspiration Sub Type(s)** list, select or deselect the subtypes as required.
6. Click the **OK** button to save the changes and close the dialog.

### Assessments

Assessments are made up of value sets, elements and progress sets. All parts are required for, and must exist prior to, the creation of assessment templates.

To create a new assessment, the following stages must be completed in order.

#### Value Set

Check whether a suitable value set already exists. Value sets provide a five point rating scale for assessment elements. There are two preloaded value sets: N,S,M,Q,V and P,N,G,S,C.

The P,N,G,S,C value set offers the following rating values:

- Positive Strengths
- No Issues

- General Issues
- Significant or Specific Issues
- Critical or Complex Issues.

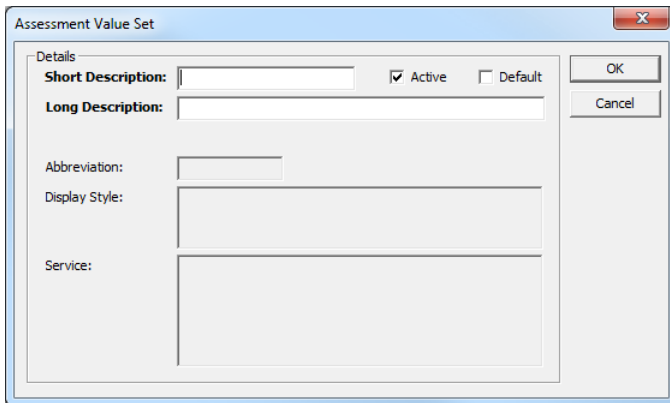
The N,S,M,Q,V value set offers the following rating values:

- Not Associated at all
- Slight Association
- Moderate Association
- Quite Strongly Associated
- Very Strongly Associated.

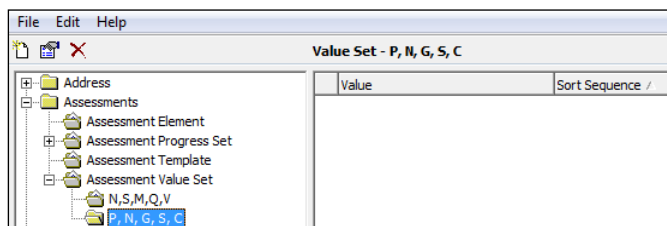
If you need to create a new set of values, follow the steps in this section. The P,N,G,S,C value set is used as an example. The ratings are abbreviated using the first letter of each value.

To create a new value set:

1. In the One IYSS System Administration Client, select **Assessment | Assessment Value Set**.
2. Click the **Add Value** icon to display a blank **Assessment Value** dialog.

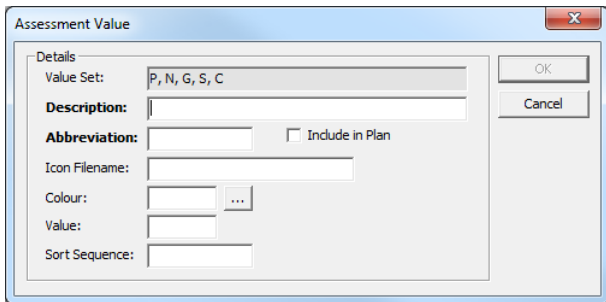


3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Click the **OK** button to save the changes and close the dialog.
6. Select the newly created **Assessment Value Set**.



## Configuring Lookups

- Click the **Add Value** icon to display the **Assessment Value** dialog.



- In the **Description** field, enter the rating level for the value.
- Enter an **Abbreviation**.
- If required, enter an **Icon Filename** to select an image to represent the progression.

**NOTE:** The icons are picked up from the `aspirenet\views\default\images\user` folder on the IIS server. Ensure the filename you enter in this field matches the filename in the folder.

- To colour-code the value:
  - Click the ... button to display a colour browser.
  - Select a colour for the value.

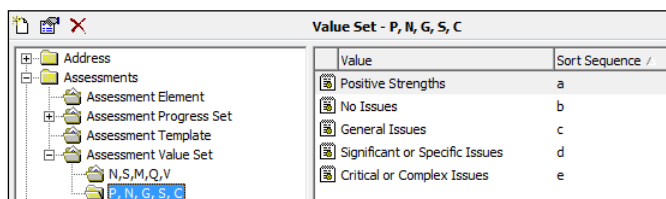
**NOTE:** Further colour options are available by clicking the **Define Custom Colours >>** button. You might find it useful to assign brighter, bolder colours to values requiring more urgent attention

- Click the **OK** button to return to the **Assessment Value** dialog.
- In the **Value** field, enter a number from 1 (negative or low) to 5 (positive or high) to determine the rating level.
  - To sort the values, in the **Sort Sequence** field enter a letter from a to e to enable the values to be sorted by level in the **Value Set** table in the One IYSS System Administration Client.

**TIP:** The sort sequence values should mirror the numbers entered in the previous step, i.e. **Value 1=Sort Sequence a**, **Value 2=Sort Sequence b**, etc.

- Click the **OK** button to save the changes and close the dialog.

The new value is displayed when the relevant **Assessment Value Set** folder is selected. You must repeat the steps to create each additional value for the value set.



Value	Sort Sequence /
Positive Strengths	a
No Issues	b
General Issues	c
Significant or Specific Issues	d
Critical or Complex Issues	e

## Assessment Element

There are several preloaded system assessment elements. Check whether a suitable one already exists (**Assessment | Assessment Element**). If you need to create a new element, follow the steps in this section.

To create a new assessment element:

- In the One IYSS System Administration Client, select **Assessment | Assessment Element**.

- Click the **Add Value** icon to display the **Assessment Element** dialog.

The screenshot shows the 'Assessment Element' dialog box. It has a title bar with the text 'Assessment Element' and a close button. The main area is divided into two sections. The top section is labeled 'Details' and contains the following fields: 'Title' (a text input field), 'Description' (a larger text area), 'Suggested Issues' (a text area), and 'Value Set' (a dropdown menu). To the right of the 'Title' field is a checked checkbox labeled 'Active'. To the right of the 'Details' section are 'OK' and 'Cancel' buttons. The bottom section is labeled 'Value Descriptions' and contains two columns: 'Value' and 'Description', each with a text input field.

- Enter a **Title** for the element.
- If required, provide a **Description**.
- In the **Suggested Issues** field, enter prompts to suggest related issues that users might need to discuss with affected clients.
- Select the appropriate **Value Set** from the drop-down.
- Assign **Value Descriptions** for each of the assessment values. To do this:
  - Select the required **Value**.
  - In the **Description** field, describe what that value means in context of this assessment element.
  - Repeat for all remaining values.
- Click the **OK** button to save the changes and close the dialog.

## Assessment Progress Set

Check whether a suitable assessment progress set already exists. The assessment progress set Y,N,MIR is preloaded. This contains the values Yes, No and More Info Req, abbreviated as Y, N and ? respectively. This set will be used as an example for this section.

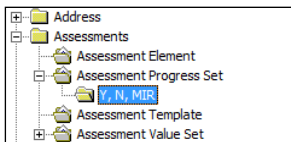
To create a new assessment progress set:

- In the One IYSS System Administration Client, select **Assessment | Assessment Progress Set**.

## Configuring Lookups

- Click the **Add Value** icon to display a blank **Assessment Progress Set** dialog.

- Complete the **Short** and **Long Description** fields.
- Ensure the **Active** check box is selected.
- Click the **OK** button to save the changes and close the dialog.
- Select the newly-created **Assessment Progress Set** folder.



- Click the **Add Value** icon to display the **Assessment Progress** dialog.

- Enter a **Description** for the value, e.g. Yes.
- Enter an **Abbreviation**, e.g. Y.
- Enter an **Icon Filename** to select an image to represent the progression.

**NOTE:** The icons are picked up from the `aspirenet\views\default\imagesuser` folder on the IIS server. Ensure the filename you enter in this field matches the filename in the folder.

- Click the **OK** button to save the changes and close the dialog.

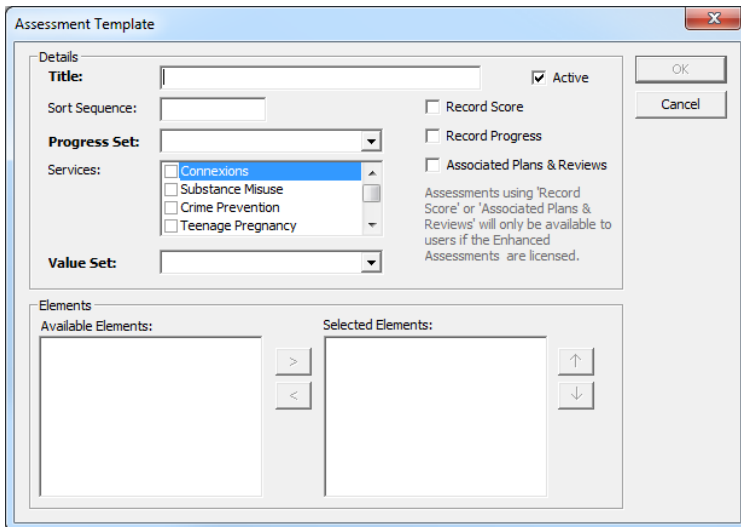
## Assessment Template

If the previous conditions have been satisfied, you can create a new template.

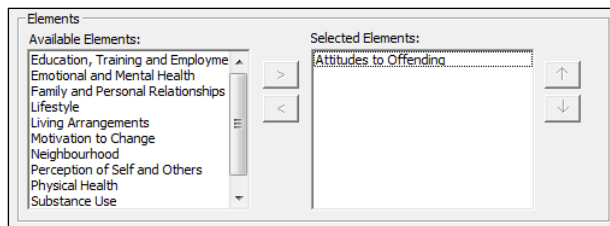
To add a new assessment template:

- In the One IYSS System Administration Client, select **Assessment | Assessment Template**.

- Click the **Add Value** icon to display the **Assessment Template** dialog.



- Give the assessment a **Title**.
- Select the **Progress Set** from the drop-down.
- In the **Services** list, select the services that will use the assessment.
- Select the required **Value Set** from the drop-down to populate the **Available Elements** list.



- To select elements for the template:
  - In the **Available Elements** list, select the required element.
  - Click the **>** button to add the element to the template.
  - Repeat for all other required elements.
- To re-order the elements in the template:
  - In the **Selected Elements** list, select the required element.
  - Click the up or down arrows to move the element accordingly.
- Click the **OK** button to save the changes and close the dialog.

## Attributes

Attributes can be held against client, provider and opportunity records. If required, one attribute can be used across all record types.

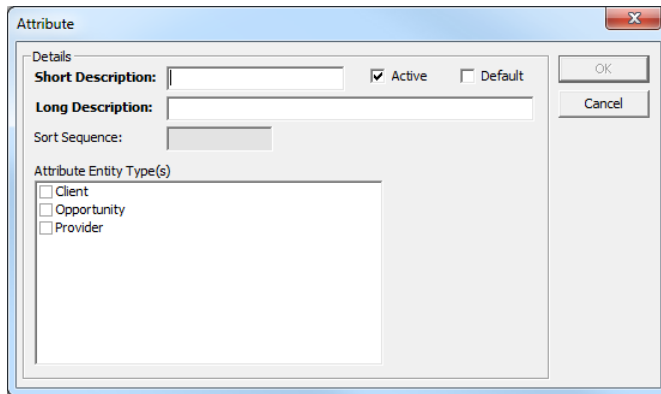
To create a new attribute:

- In the One IYSS System Administration Client, select **Common | Attribute**.



## Configuring Lookups

- Click the **Add Value** icon to display the **Attribute** dialog.



- Complete the **Short** and **Long Description** fields.
- Ensure the **Active** check box is selected.
- Select the **Attribute Entity Type(s)** from the list.
- Click the **OK** button to save the changes and close the dialog.

## Baseline Management

Baselines deal primarily with the recording of the September Guarantee and for Annual Activity Survey returns. Baseline facilities also enable the creation of other reportable client cohorts. The clients in the baseline are controlled by System Administrators. Users can update the status of clients within the baseline but not add or remove clients within it.

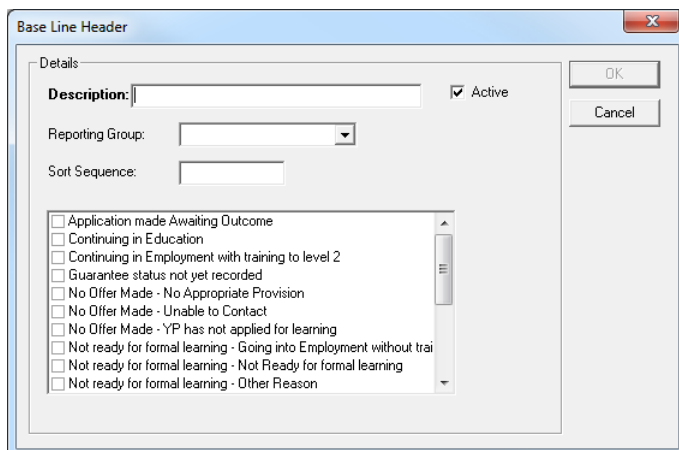
There are three baseline elements that must be configured in the following order:

- Baseline header
- Baseline status group
- Baseline status.

### Baseline Header

To configure a baseline header:

- In the One IYSS System Administration Client, select **Client | Baseline Header**.
- Click the **Add Value** icon or double-click an existing value to display the **Base Line Header** dialog.



- Complete the **Description** field.

4. Ensure the **Active** check box is selected.
5. If the baseline is being used to produce statutory returns (the September Guarantee or Annual Activity Survey), select the appropriate **Reporting Group** from the drop-down to ensure the output file is produced.
6. Select the statuses to be made available to users from the list.
7. Click the **OK** button to save the changes and close the dialog.

## Baseline Status Group

These are groupings of related statuses and are used in reporting, for example, the Guarantee Statuses group comprises the following statuses:

- No Offer Made
- Not ready for formal learning
- Offer of Education or Training to start.

To configure a baseline status group:

1. In the One IYSS System Administration Client, select **Client | Baseline Status Group**.
2. Click the **Add Value** icon or double-click an existing value to display the **Baseline Status Group** dialog.

3. Enter a name for the baseline status group in the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Click the **OK** button to save the changes and close the dialog.

## Baseline Status

To configure a baseline status:

1. In the One IYSS System Administration Client, select **Client | Baseline Status**.
2. Click the **Add Value** icon or double-click an existing value to display the **Baseline Status** dialog.

3. Complete the **Description** field.

## Configuring Lookups

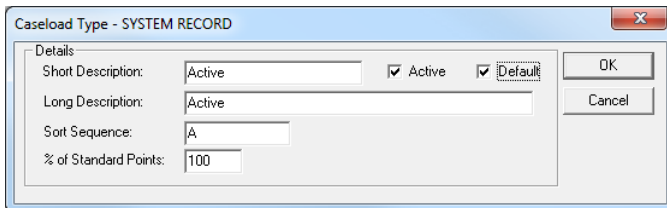
4. Ensure the **Active** check box is selected.
5. Select the required baseline status group from the **Reporting Group** drop-down.
6. Enter the correct DCSF-supplied **XML Code** to ensure output files can be translated.
7. Click the **OK** button to save the changes and close the dialog.

## Caseload Type

The two caseload types are both system records. You cannot add new types, but you can change the existing types from active and passive if required. Caseload types are used in conjunction with lead worker to define a level against the client. The type determines the percentage points used in a standard caseload. Certain clients might be considered as high-need, and be weighted as to be worth a larger percentage of a user's caseload. Too many, too few or too high-need clients can result in unequal distribution of caseloads. A certain level of deviance from the percentage of standard points indicates over- or underutilisation.

To edit caseload types:

1. In the One IYSS System Administration Client, select **Client | Caseload Type**.
2. Double-click the required type to display the **Caseload Type** dialog.



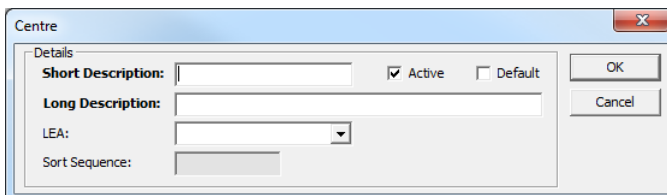
3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Enter the **% of Standard Points** a typical caseload should use.
6. Click the **OK** button to save the changes and close the dialog.

## Centres

Centres are used to determine a client's responsible LA when it cannot be worked out from the client's resident postcode or current situation provider postcode. The rules governing this can be found in the *IYSS Statistics and XML* handbook.

To create a new centre:

1. In the One IYSS System Administration Client, select **Common | Centre**.
2. Click the **Add Value** icon to display the **Centre** dialog.



3. Complete the **Short** and **Long Description** fields.
4. Select the **LEA** from the list.
5. Ensure the **Active** check box is selected.
6. Click the **OK** button to save the changes and close the dialog.

## Client Type

Client type interacts with attributes, centre, health issues and workgroups and defines which of these values are displayed for each client type. It was employed for systems that support both young people and adult contracts but only needs configuring for young person records. Any attribute, centre, health issue and workgroup options you need must exist before you change the client type. You cannot add new client types, but if necessary you can amend the current one.

To configure the client type:

1. In the One IYSS System Administration Client, select **Client | Client Type**.
2. Double-click the value to display the **Client Type** dialog.

3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Select all the required options from the **Attribute**, **Centre**, **Workgroup** and **Health Issue** lists.
6. Click the **OK** button to save the changes and close the dialog:

## Document Type

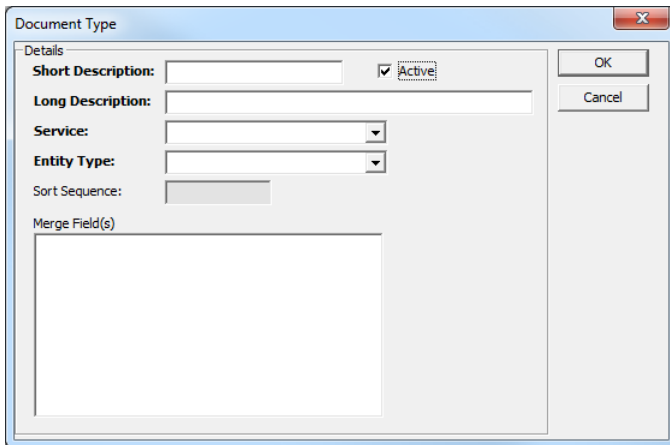
The document type lookups provide templates for one to one documents. For more information, see [One to One Document Templates](#) on page 127.

To add a document type:

1. In the One IYSS System Administration Client, select **Documents and Paragraphs | Document Type**.

## Configuring Lookups

2. Click the **Add Value** icon to display the **Document Type** dialog.



The screenshot shows the 'Document Type' dialog box. It has a title bar with a close button. The main area is divided into 'Details' and 'Merge Field(s)'. Under 'Details', there are fields for 'Short Description', 'Long Description', 'Service', 'Entity Type', and 'Sort Sequence'. There is also an 'Active' checkbox which is checked. On the right side, there are 'OK' and 'Cancel' buttons.

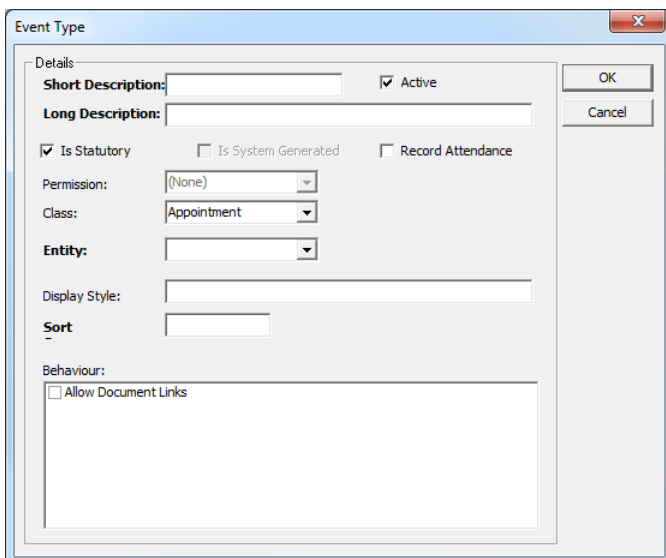
3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Select the **Service** to which the template pertains. A document type can only be applied to a single service. Only users of this service can access the template.
6. Select an **Entity Type** from the drop-down.
7. Click the **OK** button to save the changes and close the dialog.

## Event Type

Events cover physical meetings, correspondence, and procedural steps. The event type must be configured to reflect the nature of the event to ensure the fields displayed in YJ are event appropriate.

To create a new event type:

1. In the One IYSS System Administration Client, select **YJ Case | Event Type**.
2. Click the **Add Value** icon to display the **Event Type** dialog.



The screenshot shows the 'Event Type' dialog box. It has a title bar with a close button. The main area is divided into 'Details' and 'Behaviour'. Under 'Details', there are fields for 'Short Description', 'Long Description', 'Is Statutory', 'Is System Generated', 'Record Attendance', 'Permission', 'Class', 'Entity', 'Display Style', and 'Sort'. There is also an 'Active' checkbox which is checked. Under 'Behaviour', there is a checkbox for 'Allow Document Links'. On the right side, there are 'OK' and 'Cancel' buttons.

3. Enter a name for the event type in the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. If required, select the **Is Statutory** check box.

6. If the event requires client attendance, select the **Record Attendance** check box.
7. Select the **Class** and **Entity** from the drop-downs.
8. If you want to enable documents to be attached to the event, select the **Allow Document Links** check box.
9. Click the **OK** button to save the changes and close the dialog.

## Geographic Identifiers - Postcode to Local Authority

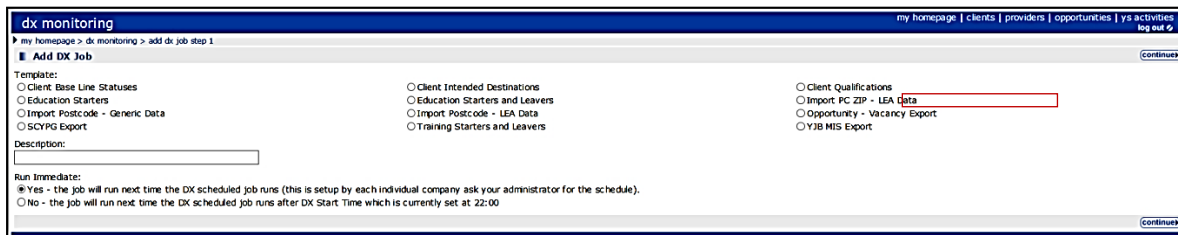
One IYSS uses a Postcode to LA mapping table to derive the LA responsible for clients. This mapping is derived from the LA postcode files supplied by the DfE. For more information, refer to the *XML Cohort Rules* section of the *One IYSS MI\_XML* handbook.

The raw files no longer need to be processed by Capita; they can be imported direct by the local authority.

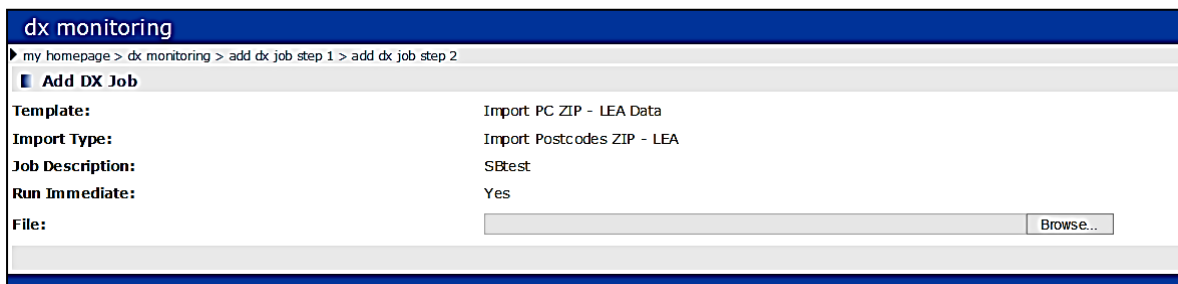
**IMPORTANT NOTE:** The files update existing Postcode to LA data. Together they contain about 2.5 million rows of data, which could take several hours to import. Do not import the files at the same time as the end of month stats job or clean up job as these rely on fully imported Postcode to LA data.

To import the file into IYSS through the One IYSS web application:

1. In the **IYSS Links** panel on **my homepage**, click the **DX Monitoring** hyperlink to display the **DX Jobs** screen.
2. Click the **submit** button to display the **Add DX Job** screen.



3. Select the **Import PC ZIP - LEA Data** radio button.
4. Enter a **Description** for the import.
5. Indicate when you want the job to run by selecting the appropriate radio button.
6. Click the **continue** button to display the next screen.



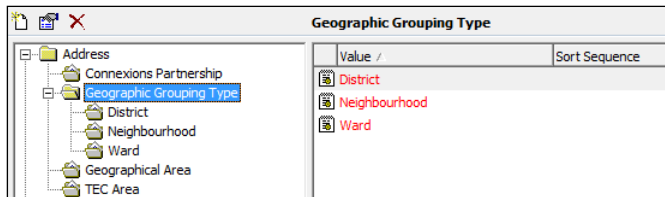
7. Click the **Browse** button to display a file browser dialog.
8. Locate the file to import.
9. Double-click the file to select it for import and return to the **Add DX Job** screen.
10. Click the **OK** button to save the changes and close the dialog.

## Geographical Grouping Type

One IYSS can identify clients' geographical areas and grouping types, based on their postcode or situation provider. There are three geographical grouping types provided:

- District
- Ward
- Neighbourhood.

These types feature in various tools within One IYSS. You can edit them as required to make them appropriate for your organisation, or create new organisation-specific ones where needed.



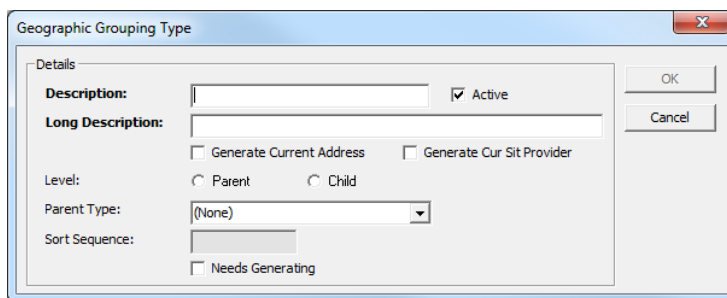
Geographic grouping type records are either parent or child records. Of the system records, district is the parent record, grouping a number of child records (wards) to cover a single, larger geographical area. A child record, like neighbourhood, can exist without being linked to a parent record.

When creating geographic grouping types that contain parent-child links, create the parent record first, then the child record, and then import the postcode data. Postcode data can only be imported to child records. After the postcode mapping data has been imported, the parent and child records can be linked.

### Configuring Parent Records

To configure parent records:

1. In the One IYSS System Administration Client, select **Address | Geographic Grouping Type**.
2. Click the **Add Value** icon or double-click an existing value to display the **Geographic Grouping Type** dialog.



3. Complete the **Description** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. To base the mapping for this area on clients' home postcodes, select the **Generate Current Address** check box.
6. To base the mapping for this area on clients' current situation providers' postcodes, select the **Generate Cur Sit Provider** check box.
7. Select the **Parent** radio button.
8. If you are creating a new **Geographic Grouping Type**, or importing new postcode data, select the **Needs Generating** checkbox.

- Click the **OK** button to save the changes and close the dialog.

## Configuring Child Records

To configure child records:

- In the One IYSS System Administration Client, select **Address | Geographic Grouping Type**.
- Click the **Add Value** icon or double-click an existing value to display the **Geographic Grouping Type** dialog.

- Complete the **Short** and **Long Description** fields.
- Ensure the **Active** check box is selected.
- To base the mapping for this area on clients' home postcodes, select the **Generate Current Address** check box.
- To base the mapping for this area on clients' current situation providers' postcodes, select the **Generate Cur Sit Provider** check box.
- Select the **Child** radio button.
- Select the **Parent Type** from the drop-down.
- If you are creating a new geographic grouping type, or importing new postcode data, select the **Needs Generating** checkbox.
- Click the **OK** button to save the changes and close the dialog.

## Importing Postcode Data

Postcode data must be in a CSV file that includes a **Postcode** column and a **Geographic Grouping Type** column. These columns must not have headings. The **Postcode** column must be on the left-hand side, the **Geographic Grouping Type** column on the right. The columns must be separated by a comma, with no space.

The postcodes must contain a space between the first and second elements of the postcode, e.g. SP4 7DE.

The file content should look similar to the following:

```
CB3 0QE,Girton
CB1 3GZ,Petersfield
PE13 4DF,March (West)
PE1 3DB,Park
PE1 5NE,East
CB1 8EB,Coleridge
CB7 4TP,Ely (North)
```

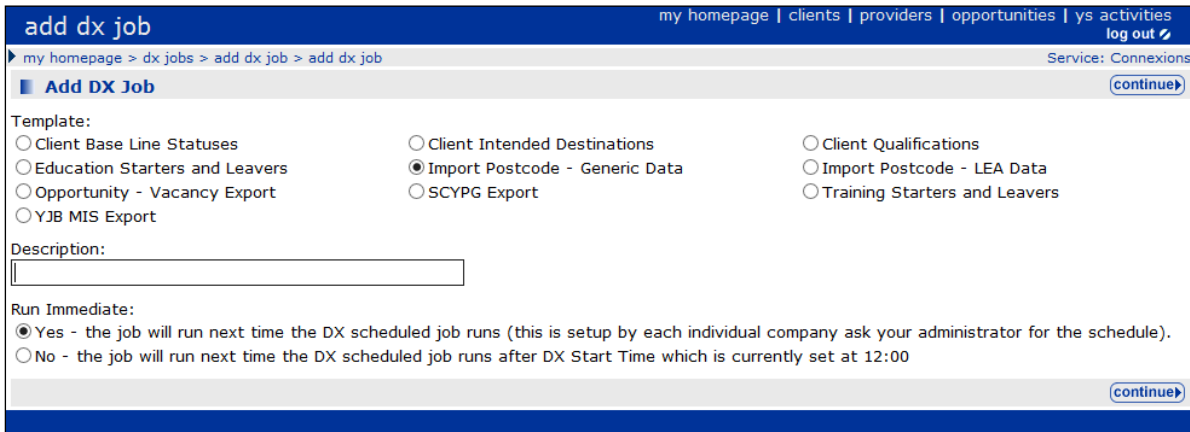
If the data file satisfies these prerequisites, you can import it into One IYSS through the One IYSS web application.



## Configuring Lookups

To import the data file:

1. Ensure that the CSV file is not open in another application.
2. In the **IYSS Links** panel in **my homepage**, click the **DX Monitoring** hyperlink to display the **DX Jobs** screen.
3. Click the **submit** button to display the **Add DX Job** screen.



The screenshot shows the 'add dx job' form. The breadcrumb trail is 'my homepage > dx jobs > add dx job > add dx job'. The 'Add DX Job' section has a 'continue' button. The 'Template' section has the following options:

<input type="radio"/> Client Base Line Statuses	<input type="radio"/> Client Intended Destinations	<input type="radio"/> Client Qualifications
<input type="radio"/> Education Starters and Leavers	<input checked="" type="radio"/> Import Postcode - Generic Data	<input type="radio"/> Import Postcode - LEA Data
<input type="radio"/> Opportunity - Vacancy Export	<input type="radio"/> SCYPG Export	<input type="radio"/> Training Starters and Leavers
<input type="radio"/> YJB MIS Export		

Description:

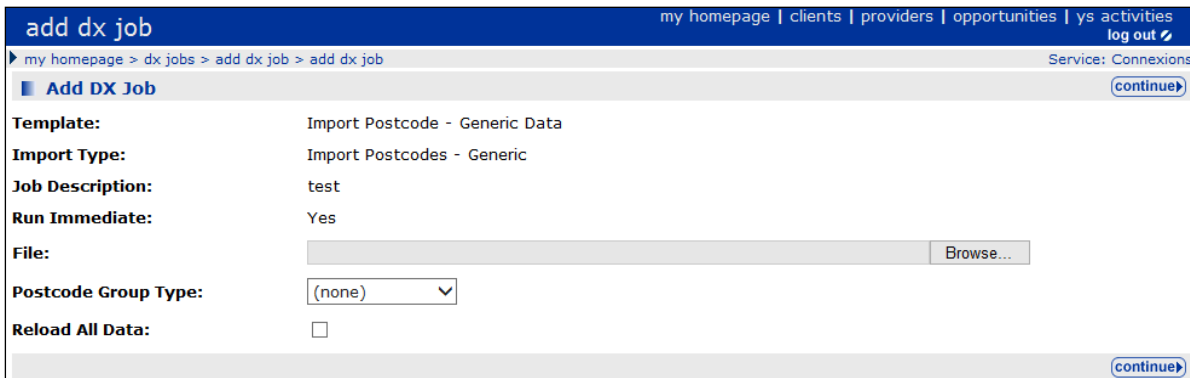
Run Immediate:

Yes - the job will run next time the DX scheduled job runs (this is setup by each individual company ask your administrator for the schedule).

No - the job will run next time the DX scheduled job runs after DX Start Time which is currently set at 12:00

continue

4. Select the **Import Postcode - Generic Data** radio button.
5. Enter a **Description** for the import.
6. Indicate when you want the job to run by selecting the appropriate radio button.
7. Click the **continue** button to display the next screen.



The screenshot shows the 'add dx job' form. The breadcrumb trail is 'my homepage > dx jobs > add dx job > add dx job'. The 'Add DX Job' section has a 'continue' button. The form fields are:

Template: Import Postcode - Generic Data

Import Type: Import Postcodes - Generic

Job Description: test

Run Immediate: Yes

File:  Browse...

Postcode Group Type: (none) v

Reload All Data:

continue

8. Click the **Browse** button to display a file browser dialog.
9. Locate the required CSV file on your computer.
10. Double-click the file to select it for import and return to the **Add DX Job** screen.
11. Select the **Postcode Group Type** for which you are importing the data.
12. Optional: To delete existing mapping data and replace it with the current import, select the **Reload All Data** checkbox, otherwise ensure it is deselected to add the new import to existing data.

- Click the **continue** button to create the DX job.

After the job has run, the entries in the **Geographic Grouping Type** column in the imported CSV file are displayed in the **Values** column of the relevant lookup.

Value /	Sort Sequence
Abbey	0
AbbeyKenilworth	0
AbbeyNuneaton	0
Abington	0
Admirals	0
Alcester	0

## Linking Child and Parent Geographic Grouping Types

To link grouping types:

- In the One IYSS System Administration Client, select **Address | Geographic Grouping Type**.
- Select the required parent **Geographic Grouping Type** folder.

Value /	Sort Sequence
District 1	
District 2	
District 3	

- Click the **Add Value** icon to display the **Parent Geographic Grouping Type** dialog.

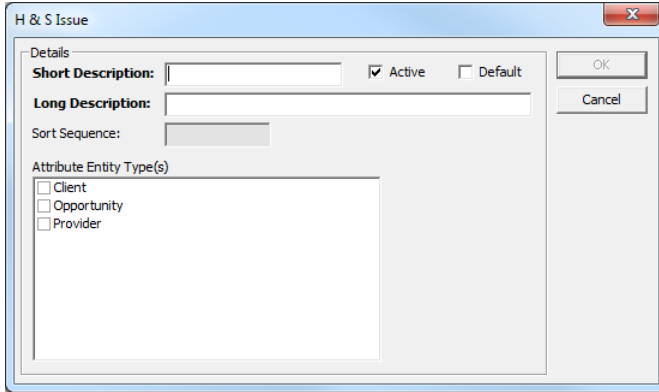
- Complete the **Short** and **Long Description** fields.
- Ensure the **Active** check box is selected.
- If required, enter a **Sort Sequence** to determine the order in which the values are to be displayed.
- Select the **Child Grouping(s)** to link to the parent record.
- Click the **OK** button to save the changes and close the dialog.

Repeat this process until all child records have been allocated to a parent.

## H & S Issue

To add an H & S issue:

1. In the One IYSS System Administration Client, select **Provider & Opportunity | H & S Issue**.
2. Click the **Add Value** icon to display a blank **H & S Issue** dialog.

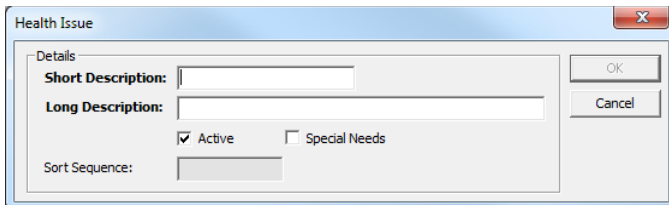


3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Select the records in which you want the issue to be available from the **Attribute Entity Type(s)** list.
6. Click the **OK** button to save the changes and close the dialog.

## Health Issues

To add a new **Health Issue**:

1. In the One IYSS System Administration Client, select **Common | Health Issue**.
2. Click the **Add Value** icon to display the **Health Issue** dialog.



3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. If appropriate, select the **Special Needs** check box. This indicates that clients with this issue have special needs and flags the client record accordingly.
6. Click the **OK** button to save the changes and close the dialog.

## Individual Circumstance Type

A preloaded set of CCIS-prescribed individual circumstance types exist that you should not change without consultation with One Application Support, however you can add new values if required. Individual circumstances that feed into CCIS-prescribed values should be mapped to the value using One IYSS mapping tools.

Values that do not correspond to CCIS-prescribed values should not be mapped. Mapping these values would exclude that individual circumstance type from the XML export.

To configure an individual service type:

1. In the One IYSS System Administration Client, select **Client | Individual Circumstance Type**.
2. To add a new value, click the **Add Value** icon to display a blank **Individual Service Type** dialog.
3. To edit an existing value, double-click the required value to display the **Individual Service Type** dialog.

4. Complete the **Short** and **Long Description** fields.
5. Ensure the **Active** check box is selected.
6. If the circumstance is intended to be temporary, select the **Requires End Date** check box. If this is selected, the system demands an expected end date in one IYSS when clients are assigned this circumstance.
7. Click the **OK** button to save the changes and close the dialog.

## Interaction Management

**IMPORTANT NOTE:** The Client Update interaction must *not* be deactivated. Doing so will cause system failure. Deselect **Is Included in Narrative** if you need to remove it from the user interface.

Interactions consist of the following elements:

- Interaction Activity Type
- Interaction Category
- Interaction Outcome
- Interaction Type
- Venue.

Before a new interaction type can be created, all relevant variables of the other four elements must exist. Interaction Category and Venue elements are configured as per the instructions in [Configuring Lookups](#) on page 39.

### Interaction Activity Types

To set up interaction activity types:

1. In the One IYSS System Administration Client, select **Interaction | Interaction Activity Type**.

## Configuring Lookups

- Click the **Add Value** icon to display a blank **Interaction Activity Type** dialog.

- Enter a name for the interaction activity type in the **Description** field.
- In the **Narrative Description** field, enter a description to be displayed in the interaction after the activity has been added.
- In the **Operational Text** field, enter an explanation of the project to be displayed as hover text on the activity in the list.
- If the activity is linked to a project:
  - Select the **Project Type** from the drop-down.
  - Depending on whether the activity is a join, leave or change type, select the appropriate **Project Activity** radio button. For more information on project-related interaction activities, see the [Interaction Activities](#) section on page 71.
- From the list, select the items as required. For more information, see the following table:

Item	Details
<b>Allow Change once saved</b>	Enables users to delete the activity after the interaction has been saved.
<b>Is Running Notes</b>	Opens a non-confidential running note when users select the activity.
<b>Is Confidential Running Notes</b>	Opens a confidential running note when users select the activity.
<b>Is Multiples Allowed</b>	Enables the activity to be selected multiple times per interaction.
<b>Is Included in Narrative</b>	Displays the activity in the Interactions section.
<b>Is Benefits Related</b>	Used for reporting purposes.
<b>Is Guarantee Related</b>	Used for reporting purposes.
<b>Is Active</b>	Activates the activity. Ensure that this is selected.
<b>Is Bulk Insert Allowed</b>	Enables the activity to be selected in Bulk Insert.

- Click the **OK** button to save the changes and close the dialog.

## Interaction Outcome

To set up new interaction outcomes:

1. In the One IYSS System Administration Client, select **Interactions | Interaction Outcome**.
2. Click the **Add Value** icon to display the **Interaction Outcome** dialog.

3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. To display the interaction outcome in the **Interaction** section of One IYSS, select the **Include in Summary** check box.
6. Click the **OK** button to save the changes and close the dialog.

## Interaction Type

To add a new interaction:

1. In the One IYSS System Administration Client, select **Interactions | Interaction Type**.
2. Click the **Add Value** icon to display the **Interaction Type** dialog.

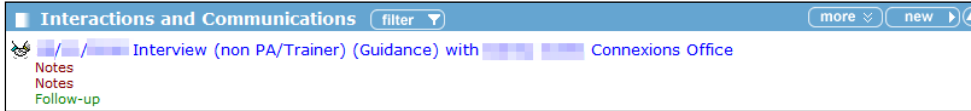
3. Enter a name for the interaction activity type in the **Description** field.
4. In the **Narrative Description** field, enter the required variables to create a detailed description that is displayed in the **Interactions** section of client records. The available variables are:

- @date
- @time
- @type
- @category
- @centre
- @venue

## Configuring Lookups

- @user
- @workgroup

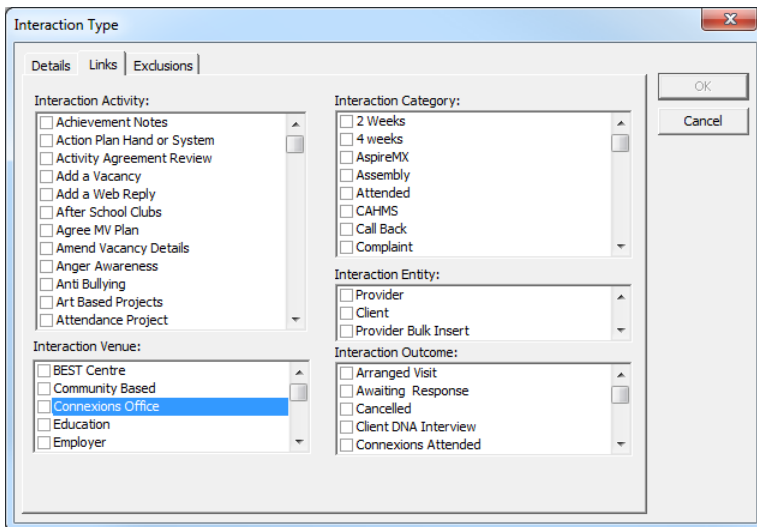
The values should be entered in a standard order across all interaction types, e.g. @date @type (@category) with @user at @venue. When the interaction is created, the values are populated by the relevant pieces of information entered during creation.



5. In the **Operational Text** field, enter an explanation of the interaction.
6. To enter an **Interaction Icon Filename**:
  - a. Click the ... button to display a file browser dialog.
  - b. Navigate to the aspirenet\views\default\imagesuser folder on the IIS server.
  - c. Double-click the required icon file to select it and close the browser dialog.
7. If the interaction has a **Default Outcome**, select it from the drop-down.
8. Select the appropriate **Service** from the drop-down.
9. If the interaction has associated costs, indicate the amount in the **Cost** field.
10. From the list, select the items as required. For more information, see the following table:

Item	Details
<b>Is Client Present</b>	Used for reporting purposes.
<b>Is Carer Present</b>	Used for reporting purposes.
<b>Is Included in Narrative</b>	Displays the activity in the Interactions section.
<b>Is Callback Activity Required</b>	Not in use.
<b>Is Benefits Related</b>	Used for reporting purposes.
<b>Is Guarantee Related</b>	Used for reporting purposes.
<b>Is Active</b>	Activates the activity. Ensure that this is selected.
<b>Is Interviewed</b>	Confirms clients' current situations automatically.
<b>Is Tracking</b>	Not in use.

11. Select the **Links** tab to display the configurable elements available to users creating interactions.



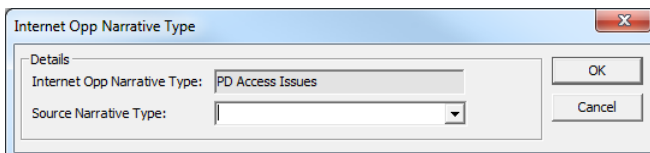
12. In the **Interaction Activity** list, select the activities users can select when creating interactions.
13. In the **Interaction Venue** list, select the venues users can select when creating interactions.
14. In the **Interaction Category** list, select the categories users can select when creating interactions.
15. In the **Interaction Entity** list, select the areas in which users can select the interaction once created, i.e. **Provider** and **Client** display it in the relevant records, **Group Session** enables it to be selected when creating group sessions and **Client Bulk Insert** displays it to users with bulk insert permissions in **Client Search | Bulk Insert**.
16. In the **Interaction Outcome** list, select the outcomes users can select when creating interactions.
17. Click the **OK** button to save the changes and close the dialog.

## Internet Opp Narrative Type

Internet opp narrative type maps the narrative memo fields available in the public opportunity search facilities to opportunity narratives that you have configured in your system.

To remap an internet opportunity narrative type:

1. In the One IYSS System Administration Client, select **Provider & Opportunity | Internet Opp Narrative Type**.
2. In the **Values** list, double-click the required type to display the **Internet Opp Narrative Type** dialog.



3. Select the new mapping target from the **Source Narrative Type** drop-down.
4. Click the **OK** button to save the changes and close the dialog.



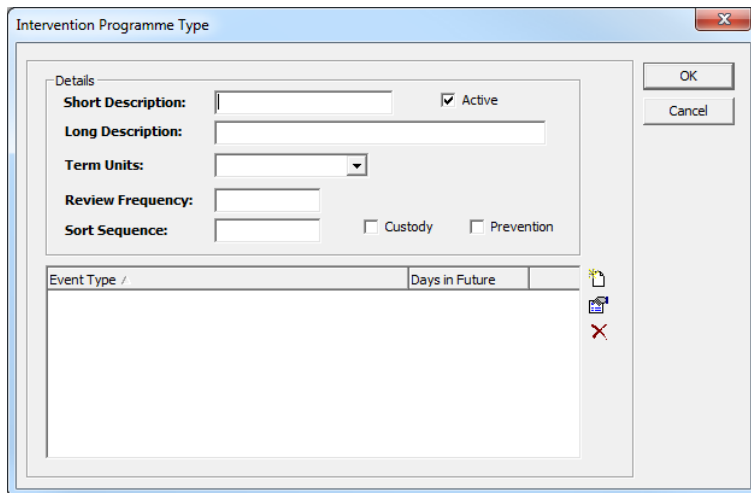
## Intervention Programme Types

Intervention programme types can be configured as custodial or prevention types.

To configure an intervention programme type:

1. In the One IYSS System Administration Client, select **YJ Case | Intervention Programme Type**.

Click the **Add Value** icon or double-click an existing value to display the **Intervention Programme Type** dialog.



2. Complete the **Short** and **Long Description** fields.
3. Ensure the **Active** check box is selected.
4. Select the appropriate period of time for the intervention programme from the **Term Units** drop-down.
5. In the **Review Frequency**, enter how often the programme needs to be reviewed. This uses the period selected in the **Term Units** field.
6. If the intervention programme is a custodial sentence, select the **Custody** check box. Clients with a current custodial intervention programme on their record, i.e. the current date is between the start and end dates of the intervention, are classed as 'Currently in Custody' in their core record.
7. If the intervention programme is a prevention programme, and does not need linking to an offence, select the **Prevention** check box. This removes the **Link Offence** field in IYSS for the intervention programme.
8. Click the **OK** button to save the changes and close the dialog.

## Occupation Management

Occupational data is held in client records (**Aspirations, Intended Destinations** and **Situations** sections), and opportunity records (**General** section).

The following four elements should be addressed in order when new occupational data is being added:

1. SOC Code - A four digit number relating to the occupations specific Standard Occupational Classification.
2. Internet Opp Category - A grouping of occupations employed in the public opportunity search facilities provided in One IYSS. As it is used by the public, it enables more user friendly language to be used than internal occupational language.

3. Occupational Sub Group - A specific job such as Plasterer, Roofer or Bricklayer.
4. Occupational Group - A grouping of specific jobs such as Skilled Construction.

The addition of new occupational configurations should be approached as follows:

### SOC Code

Check whether an appropriate Standard Occupational Classification (SOC) code exists. This is a four digit number relating to the occupation-specific SOC. To check existing SOC codes, in the One IYSS System Administration Client, select **Provider & Opportunity | SOC Code**.

If the SOC code does not exist:

1. In the One IYSS System Administration Client, select **Provider & Opportunity | SOC Code**.
2. Click the **Add Value** icon to display the **SOC Code** dialog.

3. Enter the SOC code in both **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Click the **OK** button to save the changes and close the dialog.

### Internet Opp Category

If you are using the public opportunity search facilities, check whether an appropriate internet opp category exists in the One IYSS System Administration Client (**Provider & Opportunity | Internet Opp Category**).

If the internet opp category does not exist:

1. In the One IYSS System Administration Client, select **Provider & Opportunity | Internet Opp Category**.
2. Click the **Add Value** icon to display the **Internet Opp Category** dialog.

## Configuring Lookups

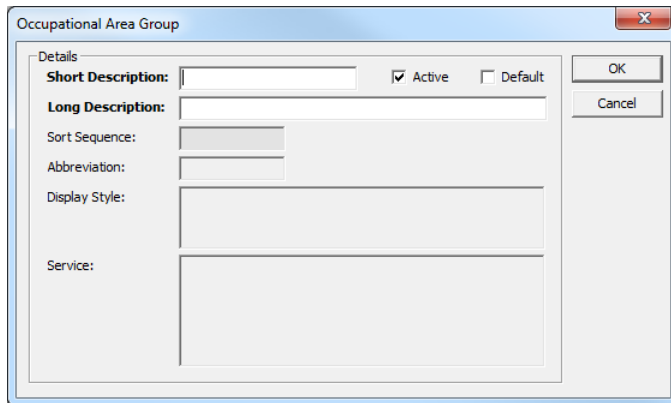
3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Click the **OK** button to save the changes and close the dialog.

## Occupational Area Group

Check whether an appropriate occupational area group exists in the One IYSS System Administration Client (**Common | Occupational Area Group**).

If the **Internet Occupational Area Group** does not exist:

1. In the One IYSS System Administration Client, select **Common | Occupational Area Group**.
2. Click the **Add Value** icon to display the **Occupational Area Group** dialog.



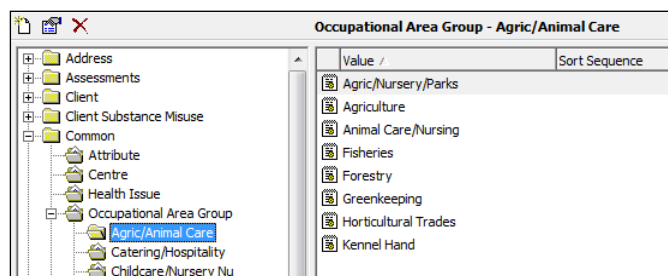
The screenshot shows a dialog box titled "Occupational Area Group". It has a "Details" section with the following fields: "Short Description:" (text input), "Long Description:" (text area), "Sort Sequence:" (text input), "Abbreviation:" (text input), "Display Style:" (text area), and "Service:" (text area). There are two checkboxes: "Active" (checked) and "Default" (unchecked). On the right side, there are "OK" and "Cancel" buttons.

3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Click the **OK** button to save the changes and close the dialog.

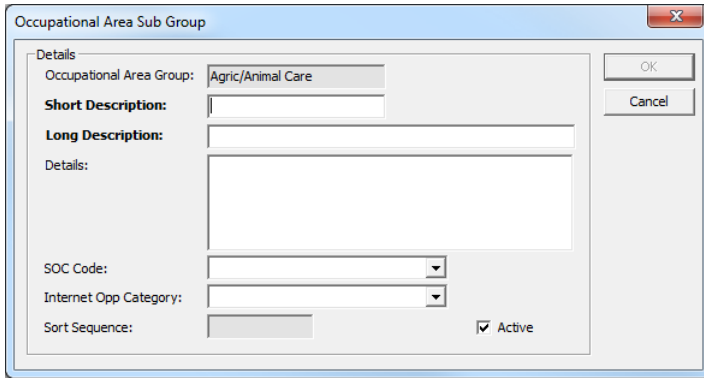
## Occupational Area Sub Group

To add a specific job:

1. In the One IYSS System Administration Client, select **Common | Occupational Area Group**.
2. In the directory tree, select the **Occupational Area Group** in which the job lookup resides.



3. Click the **Add Value** icon to display the **Occupational Area Sub Group** dialog.



4. Complete the **Short** and **Long Description** fields.
5. If required, enter any administration notes in the **Details** field.
6. Select the **SOC Code** from the drop-down.

**IMPORTANT NOTE:** Ensure you select the correct **SOC Code** otherwise CCIS mapping and Annual Activity Surveys will not process correctly.

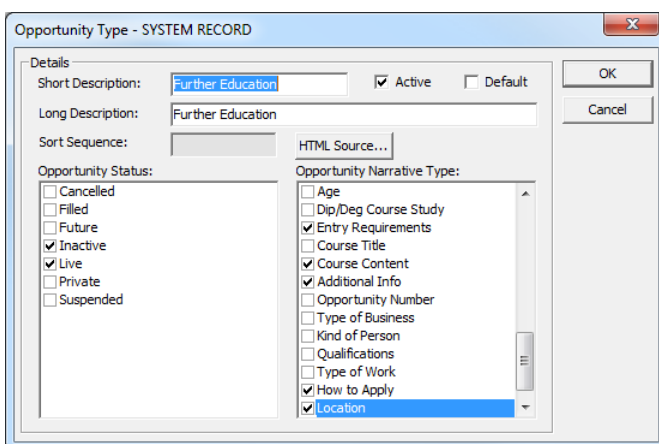
7. If you use the public opportunity search facilities, select the relevant search category from the **Internet Opp Category** field.
8. Ensure the **Active** check box is selected.
9. Click the **OK** button to save the changes and close the dialog.

## Opportunity Type

Opportunity types enable you to define which narrative memo fields and opportunity statuses are displayed under each type of opportunity. You cannot add new opportunity types. You must not edit the **Description** fields.

To reconfigure an opportunity narrative type:

1. In the One IYSS System Administration Client, select **Provider & Opportunity | Opportunity Type**.
2. Select the required opportunity type to display the **Opportunity Type** dialog.



3. In the **Opportunity Status** list, ensure only the relevant statuses are selected.
4. In the **Opportunity Narrative Type** list, ensure only the relevant types are selected.
5. Click the **OK** button to save the changes and close the dialog.

## Project Management

Projects are grouped by situation, so before creating a new project, you must check that there is an appropriate situation group for it. If not, you need to create a new one. Complete the following sections as required when creating or editing projects.

### Creating a New Situation Group

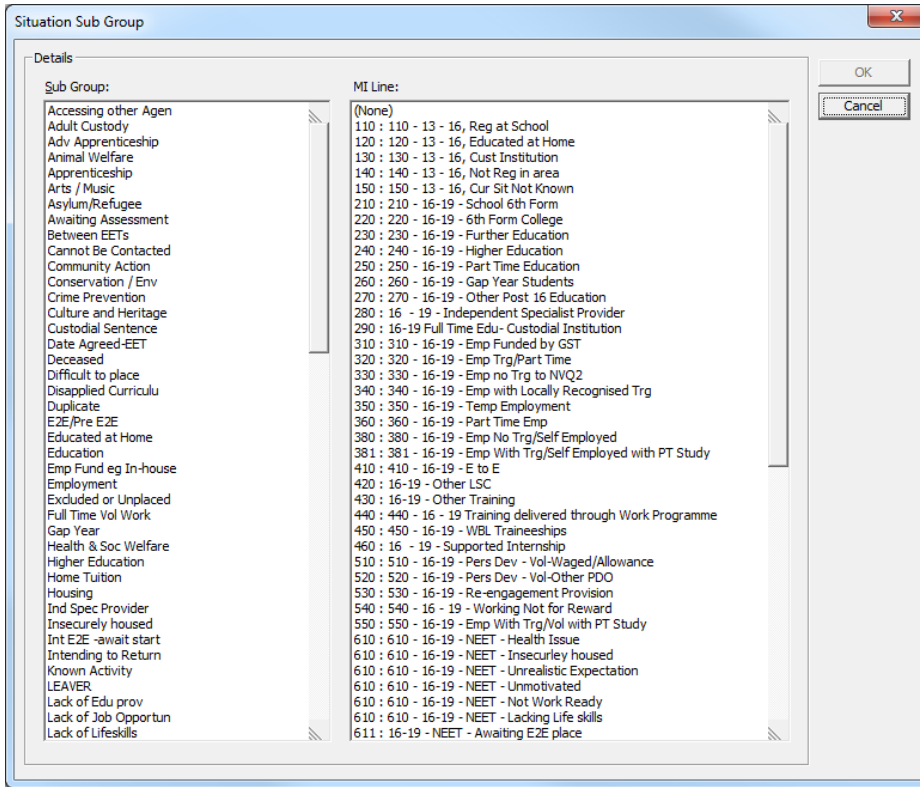
If the situation group required for your new project is not covered by the preloaded system situation groups, you must create a new one before creating the project. You can determine the fields that are displayed in the project

To create a new situation group:

1. In the One IYSS System Administration Client, select **Client | Situation Group**.
2. Click the **Add Value** icon to display a blank **Situation Group** dialog.

3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. If required, select the appropriate **Link to Opportunity** or **Link to Provider** radio button.

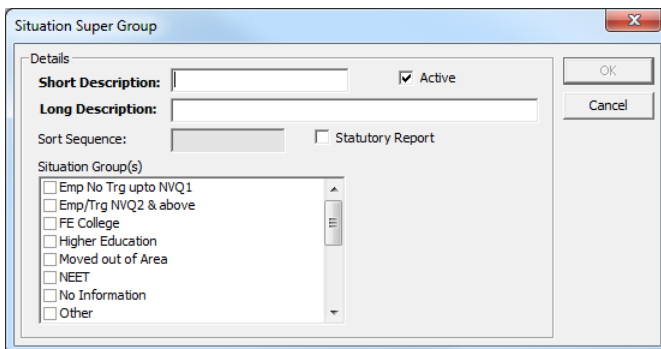
- To add sub groups or MI lines, click the **Add Value** icon to display the **Situation Sub Group** dialog.



- Select the required **Sub Group**.
- If required, select the relevant **MI Line**.
- Click the **OK** button to display a confirmation dialog.
- Click the **Yes** button to save the changes and close the dialog.
- Add any other required **Sub Groups** as before.
- If required, select the appropriate **Situation Status(es)** from the list.

**NOTE:** Situation statuses can be configured in the One IYSS System Administration Client (**Client | Situation Status**). For help configuring situation statuses, see [Creating Situation Statuses](#) on page 77.

- Click the **OK** button to save the changes and close the dialog.
- In the One IYSS System Administration Client, select **Client | Situation Super Group**.
- Select **Secondary** to display the **Situation Super Group** dialog.



- In the **Situation Group(s)** list, select the situation group you just created.

## Configuring Lookups

17. Click the **OK** button to save the changes and close the dialog.

## Creating a New Project

To create a new project:

1. In the One IYSS System Administration Client, select **Client | Project**.
2. Click the **Add Value** icon to display a blank **Project** dialog.

Project

Details

**Description:**   Active

Situation Group:

Use Integer 1

Integer 1 Description:

Lookup 1 | Lookup 2 | Lookup 3 | Lookup 4

Use Lookup

Description:

Value

This is a single option field

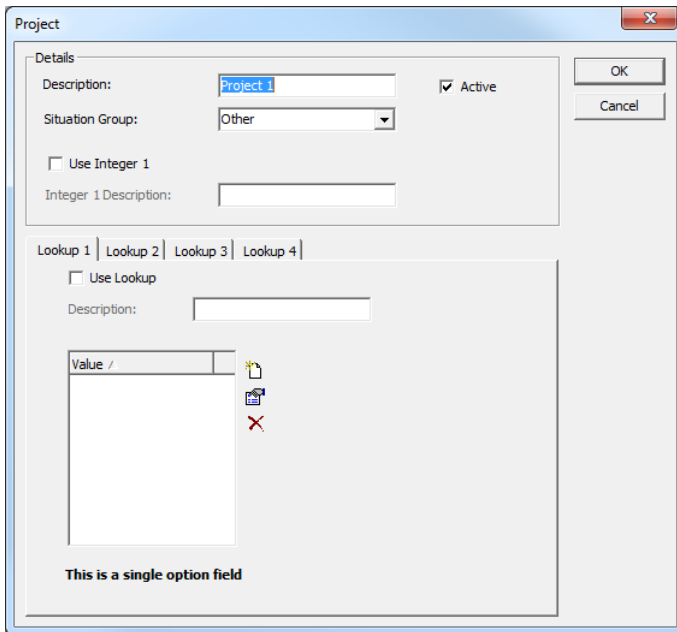
3. Enter a name for the project in the **Description** field.
4. Select the relevant **Situation Group** from the drop-down.
5. If required, select the **Use Integer 1** check box.
6. If you are using Integer 1, enter the **Integer 1 Description**.
7. Click the **OK** button to save the changes and close the dialog.

## Configuring the New Project

To configure the project:

1. In the One IYSS System Administration Client, select **Client | Project**.

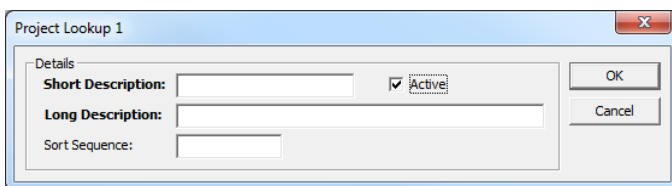
2. Select the required project to display the **Project** dialog.



3. In the **Lookup 1** tab, select the **Use Lookup** check box.
4. Enter a name for the lookup in the **Description** field.
5. Click the **Add Bean Detail** icon to display the **Project Lookup 1** dialog.



Add Bean Detail icon



6. Complete the **Short** and **Long Description** fields.
7. Ensure the **Active** check box is selected.
8. Click the **OK** button to save the changes and close the dialog.
9. Add further values for **Lookup 1** in the same manner.
10. As required, repeat steps 3 to 9 for **Lookups 2, 3 and 4**.
11. Click the **OK** button to save the changes and close the dialog.

**NOTE:** *Lookups 1 and 2 are single option fields (radio buttons). Lookups 3 and 4 are multi-select fields (check boxes).*

## Interaction Activities

After the project has been created and configured, you must set up three interaction activity types to enable project changes and so that clients can join or leave a project.

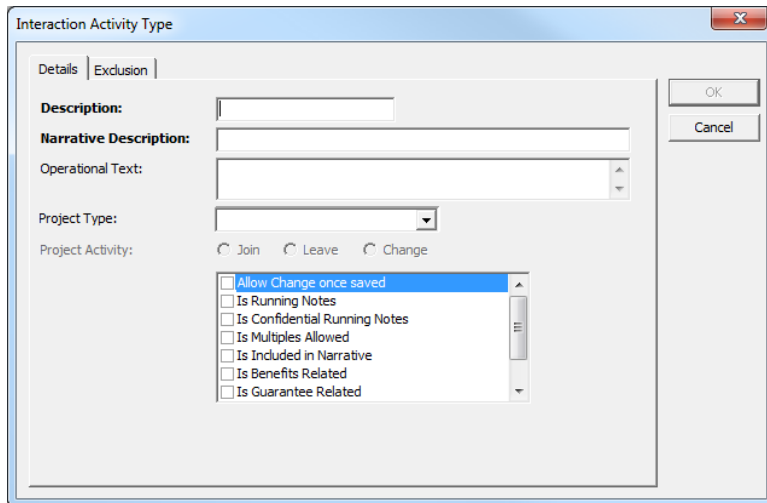
To set up the interaction activity types:

1. In the One IYSS System Administration Client, select **Interaction | Interaction Activity Type**.



## Configuring Lookups

- Click the **Add Value** icon to display the **Interaction Activity Type** dialog.



- Enter a name for the interaction activity type in the **Description** field.

**NOTE:** Depending on whether the interaction activity type record you are creating is a Join, Leave or Change record, it is advised that you use the '[Project Name]-Join' (or Leave or Change as appropriate) format. This makes it easier for users to locate the project and type they need.

- Enter a description to be displayed in the interaction after the activity has been added in the **Narrative Description** field.
- In the **Operational Text** field, enter an explanation of the project to be displayed as hover text on the activity in the list.
- Select the **Project Type** from the drop-down.
- From the list, select the following items:
  - **Is Included in Narrative**
  - **Is Active.**
- Click the **OK** button to save the changes and close the dialog.
- Repeat the process for the remaining interaction types until you have **Join**, **Leave** and **Change** activities.

## Linking Interactions and Activities

After you have created the three activities, you can link them to the relevant interactions.

To do this:

- In the One IYSS System Administration Client, select **Interaction | Interaction Type**.

2. Select the required interaction to display the **Interaction Type** dialog.

Interaction Type

Details | Links | Exclusions

Description: Appointment

Narrative Description: @date at @time - @type with @user

Operational Text:

Interaction Icon Filename: ... appointment.gif

Default Outcome:

Service: (All)

Cost: 0.00

Sort Sequence:

Is Client Present  
 Is Carer Present  
 Is Included in Narrative  
 Is Callback Activity Required  
 Is Benefits Related  
 Is Guarantee Related  
 Is Active

OK  
Cancel

3. Select the **Links** tab.

Interaction Type

Details | Links | Exclusions

Interaction Activity:

Achievement Notes  
 Action Plan Hand or System  
 Activity Agreement Review  
 Add a Vacancy  
 Add a Web Reply  
 After School Clubs  
 Agree MV Plan  
 Amend Vacancy Details  
 Anger Awareness  
 Anti Bullying  
 Art Based Projects  
 Attendance Project

Interaction Venue:

Other  
 Outreach Centre  
 School  
 Training Provider  
 YOI

Interaction Category:

2 Weeks  
 4 weeks  
 AspireMX  
 Assembly  
 Attended  
 CAHMS  
 Call Back  
 Complaint

Interaction Entity:

Provider  
 Client  
 Provider Bulk Insert

Interaction Outcome:

Arranged Visit  
 Awaiting Response  
 Cancelled  
 Client DNA Interview  
 Connexions Attended

OK  
Cancel

4. In the **Interaction Activity** list, select the appropriate activities.
5. Click the **OK** button to save the changes and close the dialog.

## Provider Contact Type

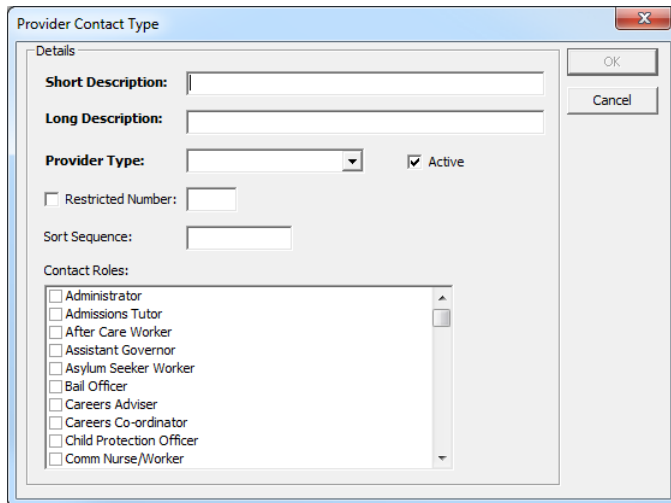
You can filter the roles available for selection under each type of provider contact. You can also restrict how many of each contact type can be used at one time.

To configure a provider contact type:

1. Ensure any provider contact roles for the contact type have been created.
2. In the One IYSS System Administration Client, select **Provider & Opportunity | Provider Contact Type**.

## Configuring Lookups

- Click the **Add Value** icon to display a blank **Provider Contact Type** dialog.



- Complete the **Short** and **Long Description** fields.
- Select a **Provider** Type from the drop-down.
- Ensure the **Active** check box is selected.
- To restrict the number of times the contact type can be used:
  - Select the **Restricted Number** dialog.
  - Enter the number in the **Restricted Number** field.
- Select the appropriate **Contact Roles** from the list.
- Click the **OK** button to save the changes and close the dialog.

## Qualification Levels

Qualification levels are displayed in the **Qualifications** section of One IYSS. Overall qualification level refers to both actual and potential qualification levels, standardised across different qualification types (vocational and academic). The specific qualification level indicates the exact qualification being studied.

The accumulated total of clients' completed specific qualification levels is measured against the overall qualification level. The highest level clients reach or exceed is taken as their overall qualification level and indicated accordingly in One IYSS. Any additional qualification levels must be made with this taken into consideration to ensure the calculations work as designed.

### Overall Qualification Level

The overall qualification level enables statutory reporting to pick up the same values and keep them consistent. The level here bears no relation to the qualification system value points. There are five included overall qualification levels that must be used, but additional levels can be added.

Overall Qualification Level	Level
Not Known	0
Below NVQ Level 2	25
NVQ2 or equivalent	40
Advanced Level	60

Overall Qualification Level	Level
Higher Level	75

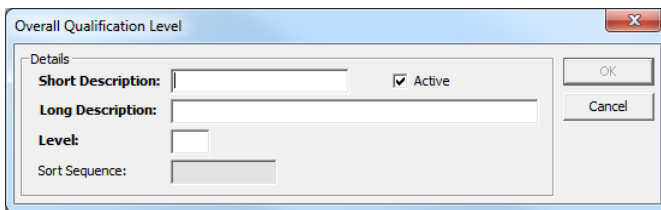
Clients' actual qualification levels are automatically worked out using points system defined by the following system values:

- Qualification Points for NVQ Level 2 = 10 points.
- Qualification Points for A Level (Advanced) = 30 points.
- Qualification Points for Higher Education (Higher) = 250 points.

If the sum of the clients' passed qualifications points is equal to the points allocated to a certain overall qualification level, clients are deemed to have achieved that level. Passed qualification points are calculated from the specific qualification level.

To add an additional overall qualification level:

1. In the One IYSS System Administration Client, select **Common | Overall Qualification Level**.
2. Click the **Add Value** icon to display the **Overall Qualification Level** dialog.



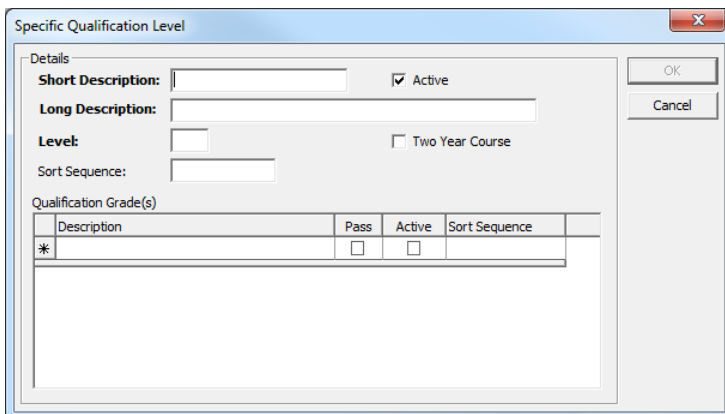
3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Enter a value in the **Level** field. This is the level mentioned in the previous table.
6. Click the **OK** button to save the changes and close the dialog.

### Specific Qualification Level

There are a number of preloaded system specific qualification levels.

To add a new specific qualification level:

1. In the One IYSS System Administration Client, select **Common | Specific Qualification Level**.
2. Click the **Add Value** icon to display a blank **Specific Qualification Level** dialog.



3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.

## Configuring Lookups

5. Enter a points value in the **Level** field.
6. If required, select the **Two Year Course** check box.
7. To enter the different potential grades in the **Qualification Grade(s)** field:

Qualification Grade(s)			
Description	Pass	Active	Sort Sequence
A*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	001

- a. In the **Description** column, enter the grade.
  - b. If the grade entered is a pass grade, select the **Pass** check box.
  - c. Select the **Active** check box.
  - d. Enter a **Sort Sequence** (001 for the highest, 002 for the second, etc.)
  - e. Press the **Enter** key to add the grade.
  - f. Repeat for all potential grades.
8. Click the **OK** button to save the changes and close the dialog.

## School Dates

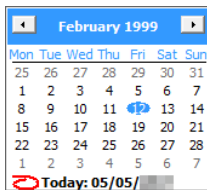
When a new client record is created or converted, the system works out clients' statutory education leaving date from the information contained in the School Dates lookup.

To add dates for a school year:

1. In the One IYSS System Administration Client, select **Provider & Opportunity | School Dates**.
2. Click the **Add Value** button to display the **School Dates** dialog.

School Dates dialog box showing fields for School Year, Statutory Leaving Date, Activity Survey Date, and Summer Leaver G Date, all set to 12/02/1999. Buttons for OK and Cancel are visible.

3. Enter the year (yyyy) in which the school year ends in the **School Year** field.
4. Enter, or select from the calendar drop-down, the leaving date for statutory education in the **Statutory Leaving Date** field.



5. Enter, or select from the calendar drop-down, the **Activity Survey Date** for that year.

**NOTE:** This is usually the 1<sup>st</sup> of November.

6. Enter, or select from the calendar drop-down, the date that extended child benefit expires in the **Summer Leaver G Date** field.

**NOTE:** This is usually the first Monday of the following year.

7. Click the **OK** button to save the changes and close the dialog.

## Situation Management

Situation groups are made up of a number of sub groups. Related situation groups come under a situation super group. Due to the nature of intergroup dependency, situation lookups should be created in the following order:

1. Situation sub group and, if required, situation status
2. Situation group
3. Situation super group.

### Creating Situation Sub Groups

To create a new situation sub group:

1. In the One IYSS System Administration Client, select **Client | Situation Sub Group**.
2. Click the **Add Value** icon to display a blank **Situation Sub Group** dialog.

3. Complete the **Short** and **Long Description** fields.
4. To calculate the situation expiry date based on a set period of time following situation creation, enter the length of time after which the situation expires in the **Followup (Days)** field.
5. If the **Followup (Days)** field has been completed, select the **User Defined Expiry Date** check box.
6. To prompt users to check clients' **Actively Seeking** status and **Aspirations** when situations linked to this sub group change, select the **Prompt Actively Seeking**.
7. Ensure the **Active** check box is selected.
8. Click the **OK** button to save the changes and close the dialog.

### Creating Situation Statuses

Situation statuses indicate the period of time clients spend in situations.

To create a new situation status:

1. In the One IYSS System Administration Client, select **Client | Situation Status**.
2. Click the **Add Value** icon to display a blank **Situation Status** dialog.

3. Enter a **Description**. It is useful to indicate the period of time and the rating it has, e.g. 'Low - 0 to 3 months'.
4. In the **Minimum Range** field, enter the lower bound of the time period.

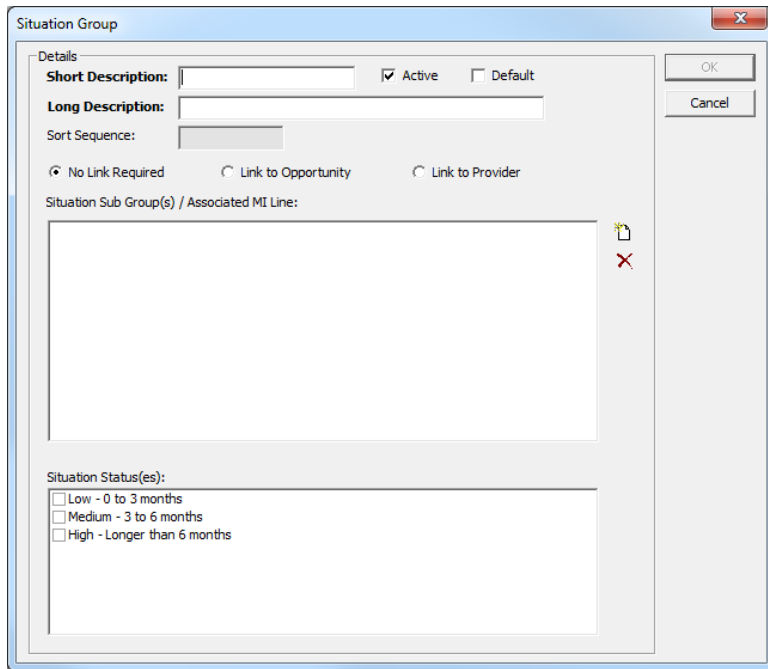
## Configuring Lookups

5. If the status is of a fixed duration, enter the upper bound of the time period in the **Maximum Range** field.
6. Ensure the **Active** check box is selected.
7. Click the **OK** button to save the changes and close the dialog.

## Creating Situation Groups

To create a new situation group:

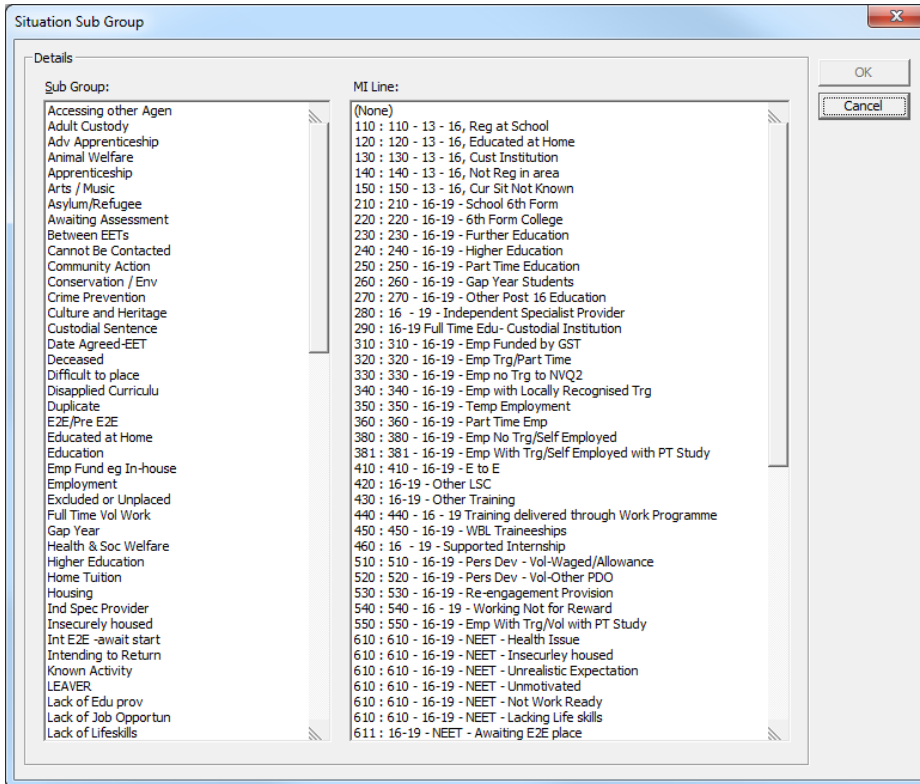
1. In the One IYSS System Administration Client, select **Client | Situation Group**.
2. Click the **Add Value** icon to display a blank **Situation Group** dialog.



3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. If required, select the appropriate **Link to Opportunity** or **Link to Provider** radio button.

**NOTE:** If either of these radio buttons are selected, users must select an opportunity or provider when creating new situation. Linking to an opportunity automatically links to the associated provider. This is useful for educational situations to identify year group (opportunity) and school (provider). Linking to a provider is useful for employment situations where there are no specific opportunities.

- To add sub groups or MI lines, click the **Add Value** icon to display the **Situation Sub Group** dialog.



- Select the required **Sub Group**.
- If required, select the relevant **MI Line**.
- Click the **OK** button to display a confirmation dialog.
- Click the **Yes** button to save the changes and close the dialog.
- Add any other required **Sub Groups** as before.
- If required, select the appropriate **Situation Status(es)** from the list.
- Click the **OK** button to save the changes and close the dialog.

**NOTE:** The **No Link Required**, **Link to Opportunity** and **Link to Provider** options have been preset in the system. The links are configured according to the following table:

Situation Group	Default Link Type
Emp/Trg NVQ2 & above	Provider
Emp No Trg upto NVQ1	Provider
Work Based Learning	Provider
Higher Education	Provider
FE College	Opportunity
Statutory Education	Opportunity
Moved out of Area	No



Situation Group	Default Link Type
No Information	No
NEET	No
Work Exp (Secondary)	No
Unknown	No
Adult Situations	No
Sixth Form College	Opportunity
School Sixth Form	Opportunity
Other	No
Millennium Volunteer	No
WEX	No

## Creating Situation Super Groups

To create a situation super group:

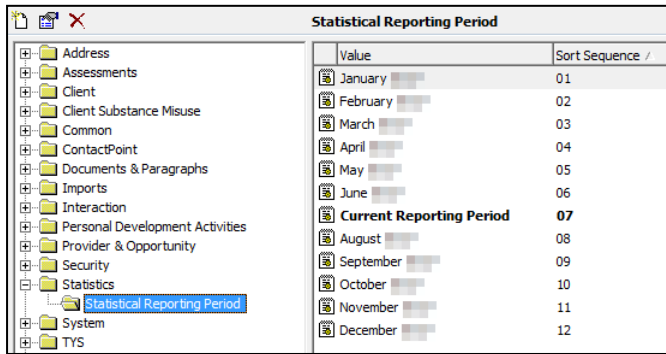
1. In the One IYSS System Administration Client, select **Client | Situation Super Group**.
2. Click the **Add Value** icon to display the **Situation Super Group** dialog.

3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. In the **Situation Group(s)** list, select all the appropriate groups.
6. Click the **OK** button to save the changes and close the dialog.

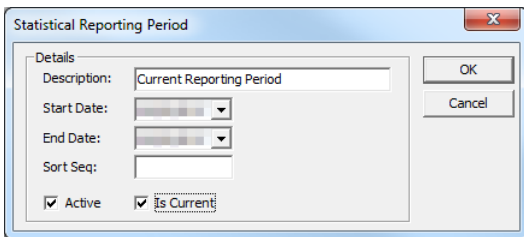
## Statistical Reporting Periods

Statistical reporting periods are used by the Statistical Reporting Tool for the NCCIS XML file production (see the [Statistical Reporting Tool](#) section on page 13 or refer to the *One IYSS MI\_XML* document available on the One Publications website). A new statistical reporting period should be created for each new month.

The current reporting period is displayed in bold in the **Statistical Reporting Period** pane.

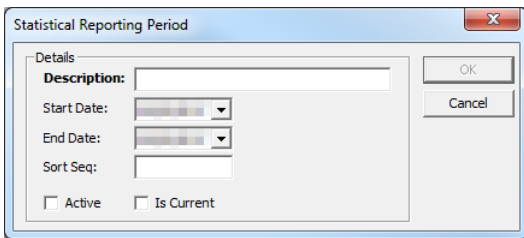


Before assigning a new current reporting period, you must deselect the **Is Current** check box in the **Statistical Reporting Period** dialog for the previous current period.



To create a new statistical reporting period:

1. In the One IYSS System Administration Client, select **Statistics | Statistical Reporting Period**.
2. Click the **Add Value** icon to display a blank **Statistical Reporting Period** dialog.



3. Enter a name for the reporting period in the **Description** field.
4. Select the **Start Date** and **End Date** for the period.
5. Select the **Active** check box.
6. To make the reporting period current, select the **Is Current** check box.

**NOTE:** You must deselect the **Is Current** check box for the previous current statistical reporting period before you can configure this period as current.

7. Click the **OK** button to save the changes and close the dialog.

## Submission Status

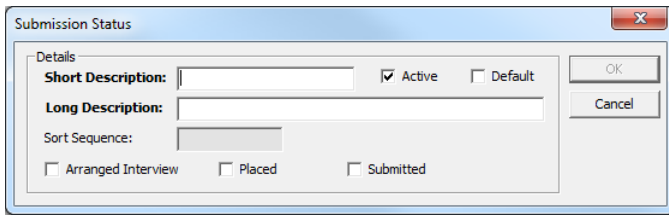
Submission statuses indicate where clients are in the process of applying for opportunity placements or jobs. This should span the process from initial provision of information to starting the placement, and include potential breakdowns such as where clients refuse the position, do not attend interviews or the submission expiry date is passed.

To add a submission status:

1. In the One IYSS System Administration Client, select **Common | Submission Status**.

## Configuring Lookups

- Click the **Add Value** icon to display a blank **Submission Status** dialog.



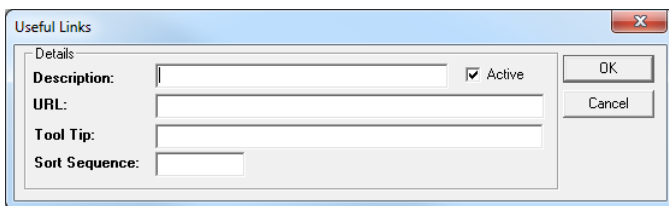
The screenshot shows a 'Submission Status' dialog box with a 'Details' section. It includes a 'Short Description' field, a 'Long Description' field, and a 'Sort Sequence' field. There are checkboxes for 'Active' (checked), 'Default', 'Arranged Interview', 'Placed', and 'Submitted'. 'OK' and 'Cancel' buttons are on the right.

- Complete the **Short** and **Long Description** fields.
- Ensure the **Active** check box is selected.
- If the status has an interview planned, select the **Arranged Interview** check box. This requires that users select the status in One IYSS to enter a date and time for the interview.
- If the status indicates that clients have started the placement, select the **Placed** check box. This recognises the placing on linked reports.
- If the status indicates that clients have applied to the placement, select the **Submitted** check box. This recognises that an application has been submitted on linked reports.
- Click the **OK** button to save the changes and close the dialog.

## Useful Links

To add new hyperlinks to the **Useful Links** list in users' One IYSS **my homepage**:

- In the One IYSS System Administration Client, select **System | Useful Links**.
- Click the **Add Value** icon to display a blank **Useful Links** dialog.



The screenshot shows a 'Useful Links' dialog box with a 'Details' section. It includes a 'Description' field, a 'URL' field, a 'Tool Tip' field, and a 'Sort Sequence' field. There is a checked 'Active' checkbox. 'OK' and 'Cancel' buttons are on the right.

- Enter a name for the link in the **Description** field. This is the name displayed in the **Useful Links** list.
- Enter the **URL** of the website.
- Enter a description of the website in the **Tool Tip** field. This is displayed as hover text for the link.
- Enter a value in the **Sort Sequence** to determine the order in which the values are displayed.
- Click the **OK** button to save the changes and close the dialog.

## YS Session Achievement Type

To determine whether session achievements are defined as Accredited, Recorded Learning or Other in system reports, you can edit the achievement type.

To create a new YS session achievement type:

- In the One IYSS System Administration Client, select **Youth Service | YS Session Achievement Type**.

- Click the **Add Value** icon to display a blank **YS Session Achievement Type** dialog.

- Complete the **Short** and **Long Description** fields.
- Ensure the **Active** check box is selected.
- To define the outcome as Accredited in system reports, select the **Accredited Outcome** check box.
- To define the outcome as Recorded Learning in system reports, select the **Recorded Learning Outcome** checkbox.
- To define the outcome as Other, for more general outcomes, ensure both checkboxes are deselected.
- Click the **OK** button to save the changes and close the dialog.

## YS Session Curriculum

To group related YS Session Curriculum Sub Area lookups, include them in the relevant YS Session Curriculum lookup. This identifies youth service curriculum areas being addressed at youth service sessions.

Before you configure or add a YS session curriculum area, ensure all the curriculum sub areas that you want to attach to it already exist in the One IYSS System Administration Client (**Youth Service | YS Session Curriculum Sub Area**). For more information, see [Configuring Lookups](#) on page 39.

To add a new YS session curriculum:

- In the One IYSS System Administration Client, select **Youth Service | YS Session Curriculum**.
- Click the **Add Value** icon to display the **YS Session Curriculum** dialog.

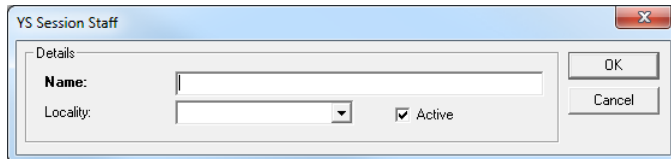
- Complete the **Short** and **Long Description** fields.
- Ensure the **Active** check box is selected.
- From the **Curriculum Sub Area(s)** list, select the values to be displayed when users select this YS session curriculum.
- Click the **OK** button to save the changes and close the dialog.

## YS Session Staff

To enable users to search for staff to attach to YS activity records by locality, you can assign YS staff to centres. A centre must exist before you can attach a staff member to it.

To add a new YS staff member and attach them to a centre:

1. Ensure the required centre has been created. For more information on creating centres, see [Centres](#) on page 50.
2. In the One IYSS System Administration Client, select **Youth Service | YS Session Staff**.
3. Click the **Add Value** icon to display a blank **YS Session Staff** dialog.



4. Enter the staff member's **Name**.
5. Select the **Centre** from the **Locality** drop-down.
6. Ensure the **Active** check box is selected.
7. Click the **OK** button to save the changes and close the dialog.

# 12 | Configuring AssetPlus

## Introduction

When first using AssetPlus, you should refer to the *AssetPlus product notes*, available on the One Publications website, for information on new fields and functionalities as well as initial configuration instructions. You might also find the *AssetPlus Guidance* document, produced by the YJB, useful in understanding the features and framework of AssetPlus.

## Enabling AssetPlus

AssetPlus must be manually enabled before it can be used within One YJ.

To enable AssetPlus, In the One IYSS System Administration Client, set the YJ - Enable Assetplus system value to '1'.

You should also ensure users have the appropriate permissions.

## Configuring Mandatory Fields

In line with YJB requirements, certain AssetPlus fields are mandatory. An AssetPlus stage cannot be completed if these fields are blank. If required by your YOT, you can also make additional fields mandatory.

**NOTE:** *Capita and the YJB recommend that you do not change the mandatory fields during your initial use of the system.*

Mandatory fields are configured within the One IYSS web application.

To configure the mandatory fields:

1. In the **IYSS Links** panel on **my homepage**, click the **Asset Plus Administration** hyperlink to display the **asset plus administration** screen.

The screenshot shows the 'asset plus administration' interface. At the top, there are navigation links: 'my homepage | clients | providers | opportunities | ys activities' and a 'log out' button. Below the navigation, there are two main panels: 'AssetPlus Stages' and 'AssetPlus Questions'.

The 'AssetPlus Stages' panel lists various stages with checkboxes for 'YJB Mandatory' and 'Locally Mandatory'. The 'AssetPlus Questions' panel lists questions with checkboxes for 'YJB Mandatory' and 'Locally Mandatory'.

Stage	YJB Mandatory	Locally Mandatory	Question
Bail Recommendation			
Case Closure			
Entering into Custody	✓	✓	Interpreter required
Placement Notification	✗	☐	Details
Post Court Report	✓	✓	Immigration/asylum status issues
Pre Sentence Report (All options)	✓	✓	Nationality
Pre Sentence Report	✓	✓	Preferred Language
Pre-Release from Custody			
Referral Order Report			
Referral in (OOCd)			
Referral in (Prevention)			
Review			
Sentenced (no report)			
Transfer YOT to YOT			
Transfer to Probation			

Below the 'AssetPlus Stages' panel, there are sections for 'AssetPlus Sections' and 'Young person's details'.

2. In the **AssetPlus Stages** panel, select the required stage to update the **AssetPlus Sections** and **AssetPlus Questions** panels.

3. In the **AssetPlus Sections** panel, select the required section and subsection to update the **AssetPlus Questions** panel to display the questions contained in that subsection.
4. To mark a **Question** as mandatory for this AssetPlus section, select the check box in the **Locally Mandatory** column.

**NOTE:** To make the same question mandatory in multiple sections, you must select the **Locally Mandatory** check box for the question in each of the required sections.

## Stage Signoff

You can configure whether AssetPlus stages require managerial signoff prior to completion. The default setting requires stages to be signed off.

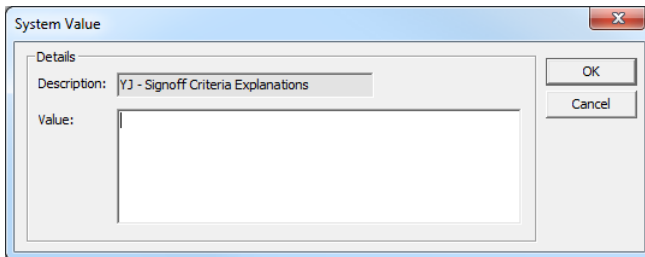
Users must have an allocated manager in order to request stage signoff. For more information, see [Assigning Workers](#) on page 87.

To configure signoff settings, you need to edit the following system values in the One IYSS System Administration Client (**System | System Value**):

- **YJ - Signoff Criteria Explanations**
- **YJ - Signoff Criteria Pathways**

To require AssetPlus stages to be signed off prior to completion, leave the **Value** field blank.

To enable AssetPlus stages to be completed without being signed off, enter “none” in the **Value** field.



To create a custom set of rules determining when an AssetPlus stage requires managerial signoff, document the rules you wish to apply from the following options, and then raise a call with One Application Support. Capita will then write the necessary routine to accommodate the required rules.

Rules that can be applied:

### Explanations & Conclusions

(YJ - Signoff Criteria Explanations)

- ROSH - N/A, Low, Medium, High, Very High
- Indicative likelihood of reoffending - Low, Medium, High
- Likelihood of reoffending - Low, Medium, High
- Where there is a difference between section 2 and 3 above
- Overall safety and wellbeing concern values - Low, Medium, High, V High

A combination of AND and OR can be used.

### Pathways & Planning

(YJ - Signoff Criteria Pathways)

- Apply rules from Explanations section above
- Scaled Approach intervention level - Enhanced, Intensive, Standard

- Difference between Scaled Approach intervention level and Indicative Scaled Approach intervention level

A combination of AND and OR can be used.

## Assigning Workers

For users to be able to request stages to be signed off, they must be allocated to a manager. Managers should allocate all their users to themselves in the One IYSS web application. Users can have more than one allocated manager. User allocation is governed by the Assign YJ Users to Manager permission in the One IYSS System Administration Client (**Security | Security Group | Admin / Manager**).

To allocate your workers:

1. In the **IYSS Links** panel in **my homepage**, click the **Assign Workers** hyperlink to display the **Change My Case Workers** screen.

Users are displayed beneath their assigned managers or, if they have not been assigned to a manager, in the **Unallocated Case Workers** section.

2. To allocate other workers to yourself, select the check box next to their names.
3. Click the **continue** button to save the changes and return to **my homepage**. The **Change My Case Workers** screen is automatically updated to list the new workers under your name.

## Pre-populating Stage Data

All new AssetPlus stages for clients who have previous AssetPlus stages are pre-populated with all relevant information provided in previous stopped or completed stages. The only exception is stages opened following a case closure stage.

You can define whether the fields in the stage following a case closure stage are automatically pre-populated or not using the YJ - Pre-populate Stage Rules system value. The default setting is to always pre-populate.

- To always pre-populate the stage, set this value to 1.
- To never pre-populate the stage, set this value to 2.
- To enable users to decide whether to pre-populate on a case-by-case basis, set to 3.

Where the system value is set to 3, pre-populate on a case-by-case basis, the **Pre-Populate Stage** field is displayed when users open a new stage following a case closure stage.



## Configuring AssetPlus

Pre-population is governed by field type. The stage fields are pre-populated with existing information based on the following rules:

- Type 1: Shared questions relevant to all stages that are always pre-populated from the main framework.
- Type 2: Hearing specific questions that are pre-populated from a previous stage only if it has the same hearing date. These questions might appear in different sections of the stage.
- Type 3: Section specific questions that are pre-populated from the same section in previous stages.
- Type 4: Section specific questions that are not pre-populated from the same section in previous stages.

## Printing Reports

In order to print reports, users must have the report permission, YJ Asset Plus Section Report. For instructions on printing stage reports, refer to the *Printing and Exporting Stages* section of the *AssetPlus* chapter in the *One Youth Justice End User Guide*.

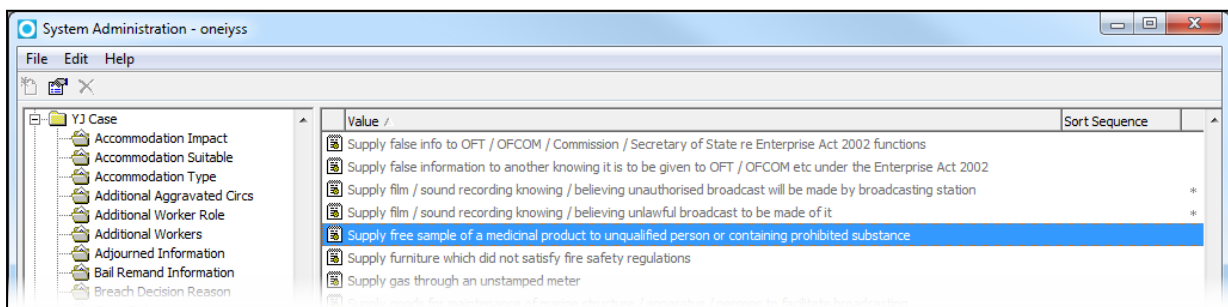
## Offence Types and YOGRS

### Introduction

One Youth Justice uses the Police National Legal Database (PNLD) set of offence types. The PNLD list of offences contains over 10,000 types. In line with the YJB's recommendations, One Youth Justice has a default list of almost 700 active offence types that can be selected within the One IYSS web application. As required, you can activate other offence types.

You cannot add or remove offence types. Pre-existing non-PNLD offence types are automatically updated with the AssetPlus One YJ upgrade. Any pre-existing offence type that could not be remapped during the upgrade must have a Youth Offender Group Reconviction Scale (YOGRS) category assigned. Any offence type that contains incomplete fields is denoted by an asterisk in the third column in the **Offence Type** lookup directory.

Refer to the YJB documentation for more information.

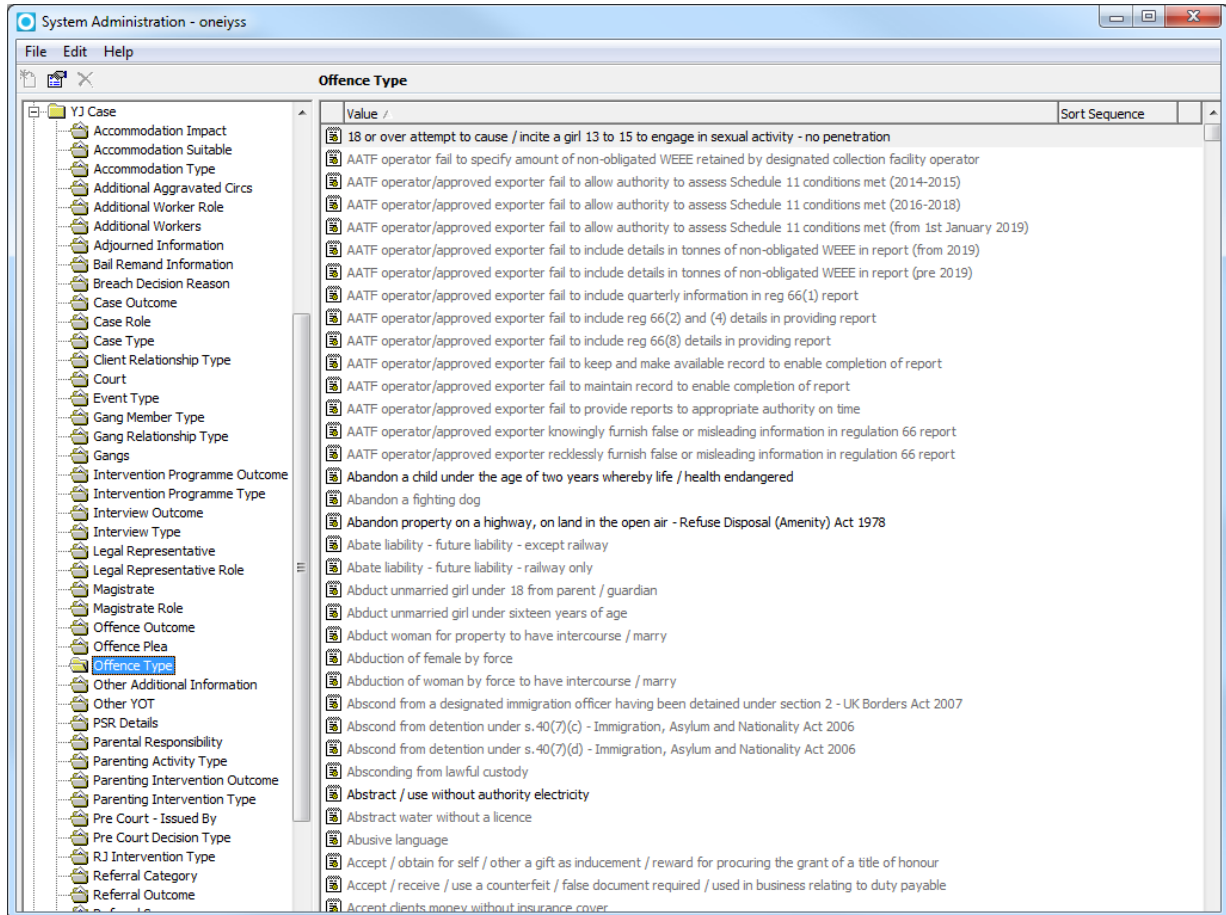


**NOTE:** The asterisk indicates that there is data missing from the offence type. You should check any offence type marked with an asterisk, however you only need to add a **YOGRS Category**. The **CJS Code**, **PNLD Reference** and **PNC Code** fields are not currently required.

## Activating Offence Types

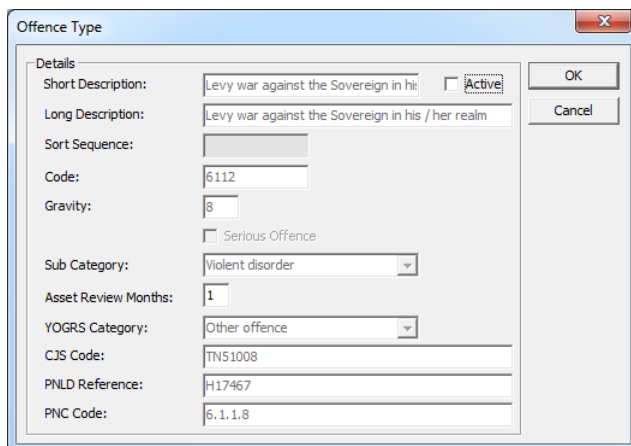
To activate other offence types:

1. In the One IYSS System Administration Client, select **YJ Case | Offence Type** to display the available offence types.



The offence types currently in use are in black type. Those in grey are inactive.

2. Double-click the required offence type to display the **Offence Type** dialog.

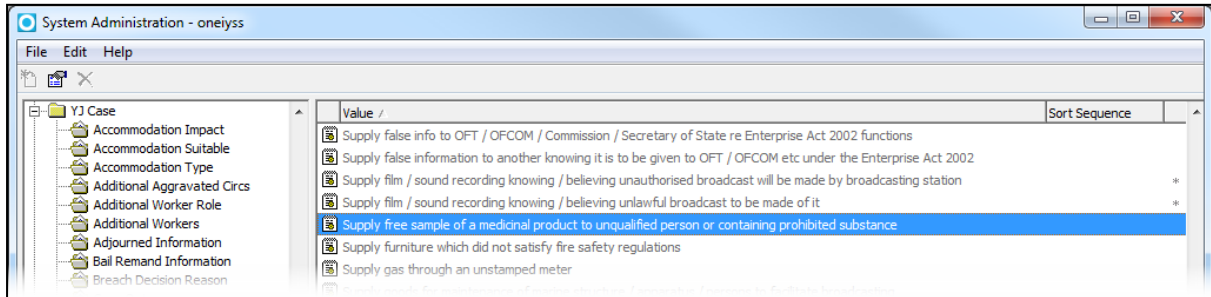


3. Select the **Active** check box.
4. Click the **OK** button to activate the offence type and close the dialog. It is now a selectable option in One Youth Justice.

## Assigning a YOGRS Category

To assign a YOGRS category to an unmapped offence type:

1. In the One IYSS System Administration Client, select **YJ Case | Offence Type** to display the available offence types. Any offence types missing information are designated with an asterisk in the untitled column next to the **Sort Sequence** column.



2. Double-click the required offence type to display the **Offence Type** dialog.

3. Select the required category from the **YOGRS Category** drop-down.

**NOTE:** The **CJS Code**, **PNLD Reference** and **PNC Code** fields do not need completing.

4. Click the **OK** button to save the changes and close the dialog.

# 13 | Producing EYE Documents with AssetPlus

## AssetPlus to Asset Data Mapping

Producing EYE documents from AssetPlus is done using the original Asset format. Asset data fields are mapped onto the AssetPlus data fields according to YJB requirements.

**NOTE:** *Not all fields are mapped, and not all mapping is exact.*

For more information on data mapping between Asset and AssetPlus, refer to the AssetPlus to Asset Data Mapping tool, an MS help file provided by the YJB to identify the AssetPlus areas and their Asset equivalents. There is also a spreadsheet, Data Mapping-v150121-1, designed for use by the software developers that provides more detail.

Instructions for producing the documents are held in the *One Youth Justice End User Guide*.

# 14 | Creating a Client Search for Distribution

Sharing searches is a way of saving a set of commonly used parameters to enable users to rapidly search their own caseloads or all clients. Shared sets of search parameters can be saved as the following types:

- My Caseload:
  - User is PA: searches within users' own caseloads.
  - User is Additional Worker: searches all clients for whom the user is a contact or additional worker.
- Not a My Caseload Search: searches across the whole database.

Search types are indicated by the following icons:



*Not a My Caseload Search*

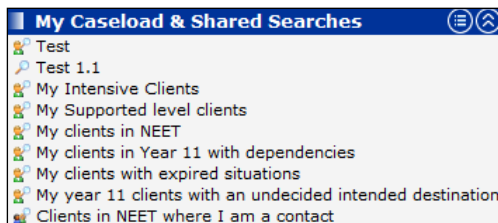


*My Caseload - User is PA search icon*



*My Caseload - User is Additional Worker search icon*

You can set up searches such as My Clients in NEET, or My Intensive Clients to provide users with quick access to the records of clients in certain conditions. The searches are saved in the **My Caseload & Shared Searches** panel on the left-hand side of **my homepage**. Only users with the Create Shared Search permission (**Security | Security Group | Function Permissions | Admin / Manager**) can share searches.



To create a client search for distribution:

1. Log in to the One IYSS web application.
2. Perform the client search you wish to share.

To perform a client search:

- a. In the **my homepage** header bar, click the **clients** hyperlink to display the **Client Search** screen.
- b. Complete all relevant search fields.
- c. Click the **search** button to display the **Search Results** screen.

- In the **Actions** list, click the **Save Search** hyperlink to display the **Save Search** screen.

**Save Search** ← back continue →

Search Name:

Notes:

My Client Search
  Available to Other Users  
 Not a My Caseload Search  
 My Caseload Search - User is a Lead Worker  
 My Caseload Search - User is Additional Worker

Display this search for:  
 User role:

User role type:

← back continue →

- Complete the **Search Name** and **Notes** fields.
- Select the **Available to Other Users** radio button to display the **My Caseload Search** options.
- Select the appropriate **My Caseload Search** radio button:
- If required, select a **User role** from the drop-down.
- If required, select a **User role type** from the drop-down.
- Click the **continue** button to save the search and return to the **Search Results** screen.

# 15 | Managing Deceased/Inactive Clients

Only users with the appropriate permissions can make client records inactive. This is done within the One IYSS web application. Setting the IYSS client record to inactive only deactivates the IYSS record. The person record remains active. If a client is deceased or moves out of the LEA, the person record should be made inactive. This will automatically deactivate the IYSS client record.

To search for inactive records and update the inactive information on the student/person, the following permissions are required:

- Update Inactive/Deceased Person Details (Client Add /Change/Delete)
- Search Inactive People (Client Search Criteria).

## Making an IYSS Client Record Inactive

To set a client record as inactive:

1. Log in to the One IYSS web application.
2. Access the appropriate client record.
3. In the **Actions** list on the left-hand side, click the **Set IYSS Client Inactive** hyperlink to display a confirmation dialog.
4. Click the **OK** button to return to save the change and return to **my homepage**.

Inactive client records have the red **IYSS INACTIVE** flag next to the client name in the client record.



## Marking a Person Record as Inactive

To set a person record as inactive:

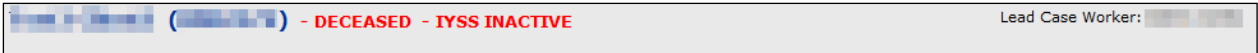
1. Log in to the One IYSS web application.
2. Access the appropriate client record.
3. In the **Actions** list on the left-hand side, click the **Set Student to Deceased/Inactive** hyperlink to display the **Change Inactive Details** screen.

A screenshot of the 'Change Inactive Details' form. At the top right, there are 'back' and 'continue' buttons. The form has three main sections:
 

- Active Student Details:** A checkbox labeled 'Active Student Details' is checked. Below it is an 'Inactive Date' field with a calendar icon.
- Inactive Reason:** A section with radio buttons. 'None' is selected. Other options include '0048-TABLE\_ID', 'Decea 2', 'Deceased', 'Moved out of LEA', and 'No Longer of School Age'.
- Deceased Details:** A section with 'Deceased Date' and 'Notified Date' fields, each with a calendar icon. Below them is a 'Confirmed Date' field with a calendar icon.

 At the bottom right, there are 'back' and 'continue' buttons.

4. Deselect the **Active Student Details** check box.
5. If necessary, amend the **Inactive Date**.
6. Select the appropriate **Inactive Reason** radio button.
7. If the client is deceased, complete the **Deceased** and **Notified Date** fields and, if known, enter a **Confirmed Date**.
8. Click the **continue** button to save the information and return to the client record.
9. A header is displayed on the relevant inactive IYSS client records indicating inactivity. The **Summary** panel is updated to include the reasons and details.



10. Clients whose person records have been deactivated because they **Moved out of LEA** or are **No Longer of School Age** have the following flag in the header:

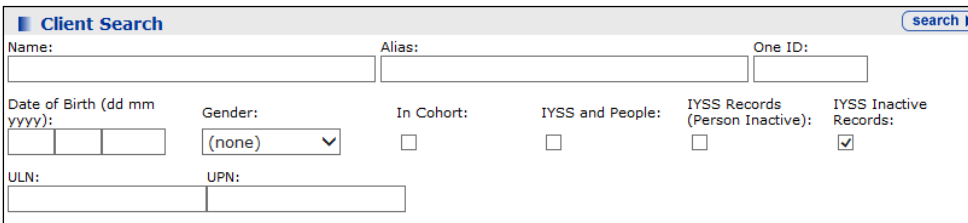


## Searching for Inactive Records

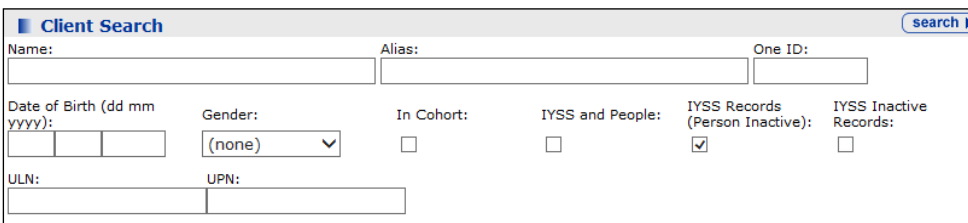
The way in which a record was set to inactive determines how it is located in the search function. Setting a person record to deceased as explained in the previous section automatically sets the IYSS client record to inactive. It is possible that a person record may be set to deceased but the IYSS client record remains active. The following steps provide ways of finding both types of record.

To search for inactive records:

1. Log in to the One IYSS web application.
2. In the title bar, click the **clients** hyperlink to display the **Client Search** screen.
3. To search inactive IYSS client records, select the **IYSS Inactive Records** check box.



4. If this did not locate the required record, deselect the **IYSS Inactive Records** check box and select the **IYSS Records (Person Inactive)** check box. This searches for records that are active in One IYSS but have an inactive person record.





## Managing Deceased/Inactive Clients

- To search non IYSS records, select the **IYSS and People** check box.

**Client Search** search ▶

Name:  Alias:  One ID:

Date of Birth (dd mm yyyy):     Gender:  In Cohort:  IYSS and People:  IYSS Records (Person Inactive):  IYSS Inactive Records:

ULN:  UPN:

- Click the **search** button to display a list of matching results.

# 16 | Roll Up Process

The roll up process moves clients' academic situations forward a year according to the set of rules outlined in the following table.

Current Situation	New Situation
Year 7	Year 8
Year 8	Year 9
Year 9	Year 10
Year 10	Year 11
Year 11	If clients' new primary and confirmed situations have already been created for the year following their Year 11 situations, they are excluded from the roll up process. All other clients have a new situation of Unknown Leaver created.
Year 12	<p>Clients on two year courses have a new situation Year 13 created.</p> <p>Clients on a one year course have a new situation of Unknown Leaver created.</p> <p>Course length is configured in the One IYSS System Administration Client (<b>Common   Specific Qualification Level   &lt;value&gt;</b>) by selecting or deselecting the <b>Two Year Course</b> checkbox.</p>
Year 13 and 14	If clients' new primary and confirmed situations have already been created for the year following their Year 13 or 14 situations, they are excluded from the roll up process. All other clients have a new situation of Unknown Leaver created.

No other situations are affected by the roll up process. Academic situations which are not a year group, e.g. Educated at Home, are not rolled up. If required, before you run the rollup, you can produce a preview Crystal Report displaying the effects of the rollup from the **End of Year Client Rollup** dialog. This may take a long time to process.

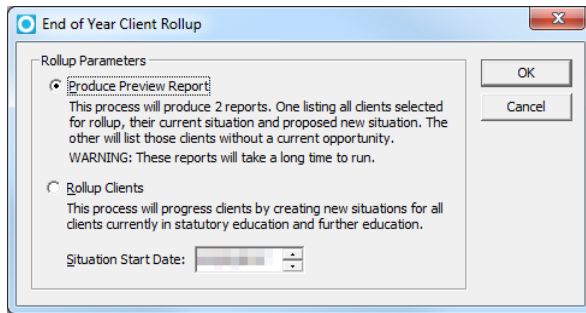
**IMPORTANT NOTES:** The correct start date must be selected. The rollup process should be run out of normal hours. The rollup process cannot be undone if you make a mistake.

To run the roll up process:

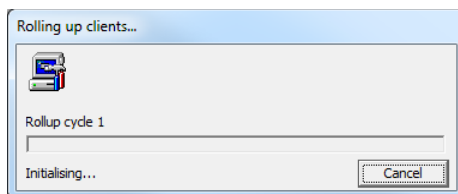
1. In the One IYSS System Administration Client, select **File | End of Year Client Rollup** to display the **Login** dialog.

## Roll Up Process

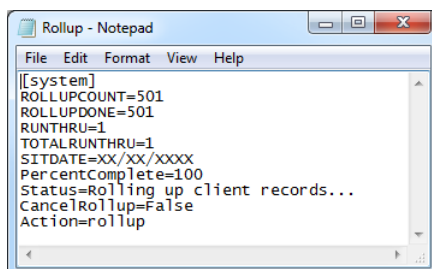
2. Log in to display the **End of Year Client Rollup** dialog.



3. Select the **Rollup Clients** radio button.
4. Enter the correct **Situation Start Date**.
5. Click the **OK** button to display a confirmation and warning dialog.
6. Click the **Yes** button to display the **Rolling up clients...** dialog.



7. On successful completion of the roll up process, a confirmation dialog is displayed.
8. Click the **OK** button to close the dialog.
9. The rollup status is saved in the Rollup.cfg file.



Any records that could not be rolled up are reported in the LogRollUp.cfg file.

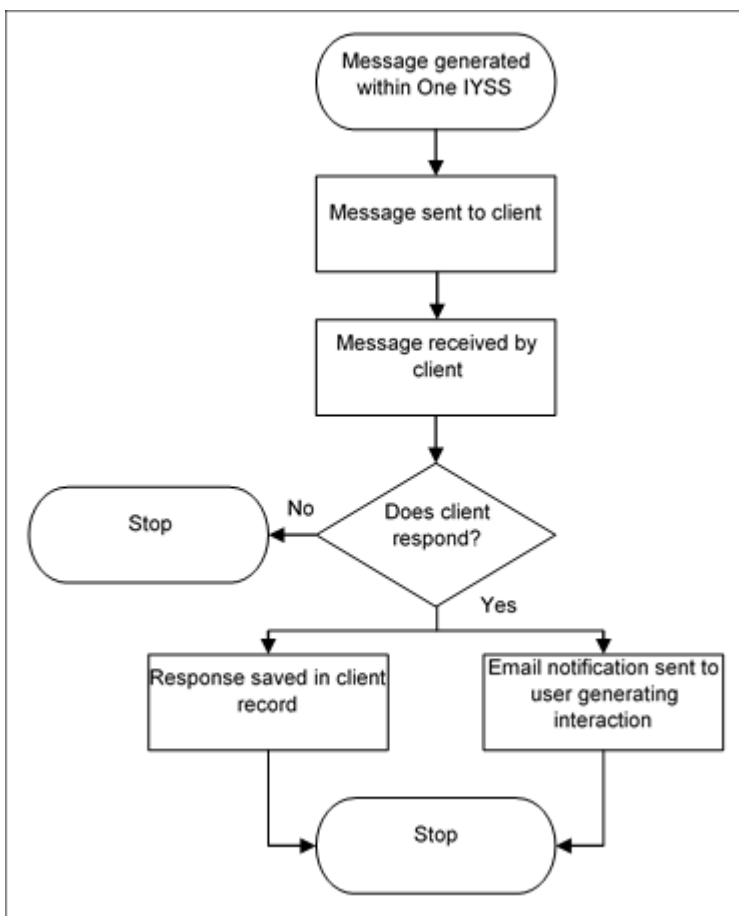
# 17 | Messaging Facility Management

MX, One IYSS’s messaging facility, enables users to exchange email and SMS messages with clients from within the system. Messages can be sent on an individual basis, through the client record, or to groups of clients. Messages are recorded in clients’ interaction sections and form part of the client record. Email or SMS conversations are recorded as a single interaction. Users and staff members are notified by email about inbound messages that concern them.

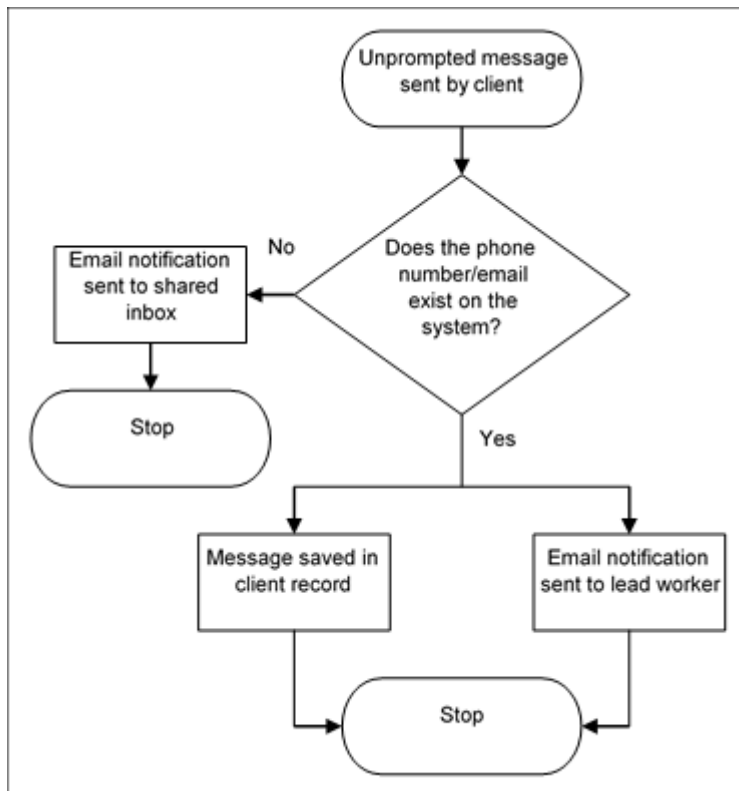
Automated SMS notifications can be sent to clients reminding them of upcoming appointments. These are sent the day before the appointment when the MXReminders job runs.

Messages are processed by MX in the following ways:

*Sending a message and receiving a response*



### Receiving an unprompted message



## Setup Prerequisites

The following items must be addressed prior to MX configuration:

### SMS Messages

There are two levels of SMS communication permitted by MX. The level you use will determine the subscription you need:

- Level A enables users to send SMS messages and can only process incoming messages sent as replies to user messages.
- Level B enables users to send SMS messages to clients, and can process both prompted (replies) and unprompted SMS messages from clients to users.

SMS processing within MX is only done through the service provider TextAnywhere. To use MX, you must register with TextAnywhere, who provide you with an ID and password. If you subscribe to Level B, to enable clients to contact users through unprompted SMS messages, TextAnywhere will provide you with a telephone number you can provide to clients.

Each service must have its own TextAnywhere account. This enables messages and the resulting interactions to be associated to the appropriate service.

MX uses the telephone numbers in client records to identify clients who send unprompted messages. It notifies the client's lead worker if the number is recognised, if not, the message is sent to a shared inbox.

**NOTE:** Please contact Capita support for details of the TextAnywhere reseller page.

### Email Messages

A mailbox is required to send and receive email messages. MX will connect to this mailbox to collect incoming messages. The mailbox must be able to use both SMTP (for outgoing) and POP3 (for incoming) protocols.

Each service must have its own email account and POP3 credentials. This enables messages and the resulting interactions to be associated to the appropriate service.

To configure emails within MX, you need the following mailbox details:

- The SMTP server name or IP address.
- The email address being used to send messages.
- The POP3 server name or IP address.
- The POP3 account user name and password.
- The POP3 port number (the standard port is 110).

### Administrator Email Address

Any incoming messages that cannot be identified and appended to a client record are sent to an administrator email address (specified in the MX - Administrator Email Address system value). This should be a shared mailbox to ensure all of the relevant users can access it.

This email address should not be the same as the one used for general email processing.

### User Contact Details

All relevant user email addresses must be known and up to date in the system.

### MX User Account

A dedicated user account should be set up for MX. This account must have permission to create interactions. MX uses this account to process messages and create the interactions in client records.

## Configuration

If the prerequisites have been satisfied, you can configure MX through by updating certain system values.

To do this:

1. In the One IYSS System Administration Client, select **System | System Values**.
2. Update the values as explained in the following table:

Value	Further Information
MX - Administrator Email Address	This is the address identified in the Prerequisites. It is recommended that this is the email address of a mailbox accessible by all One IYSS administrators.
MX - Deliver Messages	This activates or deactivates the AspireMX delivery function. When set to 1 (True), the function is active.
MX - Earliest Time to Send Text Message	This sets a time (hh:mm) before which the system will not send text messages to clients.
MX - IYSS Network UserID	This is the One IYSS account ID identified in the Prerequisites.
MX - IYSS Network UserID Password	This is the encrypted password for the account identified in the Prerequisites. For help encrypting the password, contact One Application Support.
MX - Latest Time to Send Text Message	This sets a time (hh:mm) beyond which the system will not send text messages to clients.

Value	Further Information
MX - Number of Days to Keep Job History	This is the number of days message history is kept. Message history assists with troubleshooting in the event of errors.
MX - POP3 Port	This is the port number of the POP3 account used to receive emails identified in the Prerequisites. This defaults to 110.
MX - POP3 Server	This is the name or IP address of the POP3 server identified in the prerequisites.
MX - SMTP Server	This is the name or IP address of the SMTP server identified in the Prerequisites.
MX - Tracking Number Prefix	For Capita use only.

- Assign the messaging permissions to the appropriate users.

You can grant individual messaging (**Client Functionality | Send Message Link**) and mass messaging (**Client Bulk Updates | Bulk Update - Send Message**) permissions. You can do this by adding the permissions to existing security groups or by creating message-specific groups and then adding the appropriate users to them. For more information on updating security permissions, see [Editing Security Group Permissions](#) on page 28.

- Set up the service-specific email accounts for each of the services using the MX function. For more information, see [Service Configuration](#) on page 31.
- Confirm that the schedule jobs for AspireMX and MXReminder have been scheduled to run at a frequency that you require and that they have been configured to connect to the right server and database.

The MXReminder job should be scheduled to run in between the times specified in the MX - Earliest Time to Send Text Message and MX - Latest Time to Send Text Message system values. For more information, see [Administrative Monitoring](#) on page 10.

## Front End Considerations

Users can only access the **Send Message** link in the **Actions** list on a client record if:

- They have been granted the **Client Functionality | Send Message Link** permission.
- The client has a valid email or mobile phone number entered in their record.
- The system values MX - Send Email Messages or MX - Send Text Messages are set to “1” (True), depending upon whether clients have email addresses or mobile phone numbers recorded.
- The client does not have the following attributes recorded:
  - Do Not Email
  - Do Not Text.

Clients who do not want to receive emails or text messages can elect not to receive them by having the **Do Not Email** and **Do Not Text** check boxes selected in the **Administration** section of their client record. These attributes are added automatically if the **Consent** section has been marked as Do Not Contact.

A text message allows a maximum of 160 characters. A character count is displayed when there are less than 50 remaining characters. If the user goes over the 160 limit then another character count with the amount over is shown in red and the message cannot be sent.

Sent messages are held until the MX scheduled job runs, at which point the messages are sent and added to the client’s **Interactions and Communications** panel in their IYSS record.

## System Considerations

The following pre-set values are crucial to the performance of MX and should not be changed. Consult with One Application Support if you believe you need to alter any of these. They can be found in the One IYSS System Administration Client in the following locations:

### Interaction | Default Interactions:

- AspireMX Email Message Rcvd
- AspireMX Email Message Sent
- AspireMX Text Message Rcvd
- AspireMX Text Message Sent

### Interaction | Interaction Type:

- Message Received

### Interaction | Interaction Activity Types:

- Created Message
- Email Message Received
- Email Message Sent
- Email Reply Received
- Email Reply Sent
- Text Message Received
- Text Message Sent
- Text Reminder Sent
- Text Reply Received
- Text Reply Sent

### Interaction | Interaction Categories:

- AspireMX

### Common | Attributes:

- Do Not Email
- Do Not Text.



# 18 | Crystal Reports

## Introduction

Crystal Reports that have been uploaded into One IYSS for distribution to end users are listed in the **Security | Function** folder in the One IYSS System Administration Client. These reports are used for producing management information, output lists from search results and mass mail-out documents. You can group reports into categories and control who has access to them through the function group and security group values. After they have been published, Crystal Reports must be selected in the appropriate security groups in the One IYSS System Administration Client before they will appear to users (**Security | Security Groups | Reports Permissions**).

You can publish report templates that are dependent on search results or complex reports that are independent of search results. To use the full range of available functions, this should be done from a computer with Crystal Reports XI installed. For more information regarding mass mail merge templates, see [Appendix 4: Creating a Report Template for use through Searches](#) on page 219.

## Report Templates

To publish a report template:

1. In the One IYSS System Administration Client, select **Security | Function**.
2. Click the **Add Value** icon to display the **Function** dialog.

3. Complete the **Description**, **Long Description** and **Explanation** fields.
4. Ensure that the **Active** check box is selected.
5. If you restrict user access to defined sets of clients according to their workgroup, select the **Filter By Workgroup** check box.
6. If the report you are publishing has not been imported:
  - a. Click the **Import** button to display a file browser dialog.
  - b. Select the required report.

- c. Click the **Open** button to import the report.
7. To display imported reports for editing, click the **Open** button.
8. Select the **Template** radio button.
9. If the report relies on client searches being completed by users, select the **Requires Client** check box.
10. If the report relies on provider searches being completed by users, select the **Requires Provider** check box.
11. If the report relies on opportunity searches being completed by users, select the **Requires Opportunity** check box.
12. Click the **OK** button to save the changes close the dialog.

**NOTE:** The Crystal Report being published must have been configured for use as a template for this action to work.

## Complex Reports

To publish a complex report:

1. In the One IYSS System Administration Client, select **Security | Function**.
2. Click the **Add Value** icon to display the **Function** dialog.

3. Complete the **Description**, **Long Description** and **Explanation** fields.
4. Ensure that the **Active** check box is selected.
5. If you restrict user access to defined sets of clients according to their workgroup, select the **Filter By Workgroup** check box.
6. If the report you are publishing has not been imported:
  - a. Click the **Import** button to display a file browser dialog.
  - b. Select the required report.
  - c. Click the **Open** button to import the report.
7. To display imported reports for editing, click the **Open** button.
8. Select the **Complex** radio button.

9. Select a **Function Group** into which the report is to be categorised.
10. Indicate whether the report is to be viewed in the Crystal viewer or exported to a Microsoft Word or Excel or a .pdf file by selecting the appropriate radio button.
11. Select the appropriate **Parameter Set** from the drop-down.

**NOTE:** If the report is using a predefined set of parameters, select the set from the drop-down. However, most One IYSS bespoke reports are written with their own parameters. If this is the case, select the **No Parameters** option.

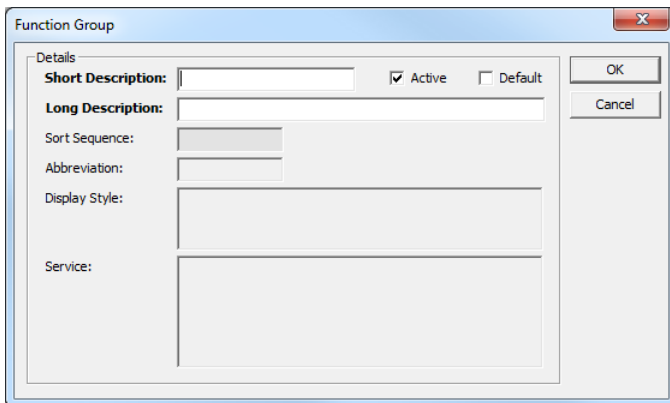
12. Click the **OK** button to save the changes and close the dialog.

## Function Groups

To categorise how reports are grouped together, you can assign them to function groups. Before a report can be assigned to a function group, the group must have been created in the One IYSS System Administration Client.

To add a new function group:

1. In the One IYSS System Administration Client, select **Security | Function Group**.
2. Click the **Add Value** icon to display the **Function Group** dialog.



3. Enter a name for the function group in the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Ensure the **Default** check box is deselected.
6. Click the **OK** button to save the changes and close the dialog.

# 19 | Youth Justice - AssetPlus Standard Reports

## Report Overview

The following reports are provided for use with the AssetPlus functionality of One Youth Justice. When running these reports, users specify the time period to be covered by the report.

Report Number	Report Name	Report Contents
7.1	AP Started In Period	Basic details of AssetPlus stages with an Assessment Start Date within the user-defined time period. Includes stage statuses Completed, Stopped, Cancelled or In Progress.
7.2	AP Completed In Period	Basic details of completed AssetPlus stages with an Assessment End Date within the user-defined time period.
7.3	AP Current Stages	Basic details of current AssetPlus stages, including information on countersignature status, i.e. requested or completed.
7.4	AP Cancelled Stages	Basic details of cancelled AssetPlus stages with an Assessment End Date within the user-defined time period.
7.5	AP Stopped Stages	Basic details of stopped AssetPlus stages with an Assessment End Date within the user-defined time period.
7.6	AP Transition Report	Analysis of Youth Justice cases open on the user-specified date. Compares the last Asset risk levels to the first AssetPlus risk levels (completed stages only).
7.7	AP 'Yet to Clarify' Analysis	Analysis of all AssetPlus stages that were completed within the user-defined time period, with basic aggregation of the number of times 'Yet to Clarify' was recorded as a response against each eligible question type.
7.8	AP Risk Analysis	Analysis of all AssetPlus stages that were completed in the user-defined time period, with a comparison of system-generated risk levels against the user defined override, and details of other risk related concerns.
7.9	AP Safety Wellbeing Analysis	Analysis of all AssetPlus stages that were completed in the user-defined time period, with details of safety and wellbeing and related concerns.
7.10	AP Desistance	Analysis of all AssetPlus stages which were completed in the user defined time period, with an aggregation of Categories, and the number of instances both for and against desistance.
7.11	Offences	Details of offences committed in the user-defined time period for which a substantive outcome has been received. This includes information on offences added as part of AssetPlus.

## Current Report Version

The following table indicates which version of the reports you should be using. If you are not using the stated version, you should download the most up-to-date report Zip file from the YJ section of the One Publications website.

Report	Latest Version	Date Released
7.1		
7.2		
7.3		
7.4		
7.5		
7.6		
7.7		
7.8		
7.9		
7.10		
7.11		

1.

## Report Details

### 7.1 AP Started in Period

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release
1.1	September 2017	Code changes to improve robustness of report when managing migrated data. Added Service Centre for local report writers to bring the field in, if required.

This report provides the basic details of AssetPlus stages with an Assessment Start Date within a user-defined period. It includes the following stage statuses:

- Completed
- Stopped
- Cancelled
- In Progress.

#### Parameters

Parameter	Type	Details
<b>Period Start</b>	Date	Start of the time period for the analysis (the report includes stages started after this date and before the <b>Period End</b> date).
<b>Period End</b>	Date	End of the time period for the analysis (the report includes stages started before this date but after the <b>Period Start</b> date).
<b>Residence Status</b>	Drop-down	Residence status on the start date of the assessment ( <b>YJ Case   Summary   YJ Residence Status</b> ).

Parameter	Type	Details
<b>Enter Workgroup</b>	Text	Free text field. If required, enter a workgroup to return only clients for whom the workgroup is responsible ( <b>Client View   Administration   Managing Team</b> ). Defaults to N/A to return all clients.
<b>Enter Report View</b>	Drop-down	Enables the choice between a formatted view for reporting to managers, or a data only view for exporting to a spreadsheet for further manipulation.

## Summary

The summary cross tab lists the number of stages for each status during the time period.

## Fields

Field	Details	Source
<b>ONE ID</b>	Person ID	Capita One for in progress and cancelled stages. Snapshot data for completed and stopped stages.
<b>Fullname</b>	Surname, Forename	Capita One for in progress and cancelled stages. Snapshot data for completed and stopped stages.
<b>DOB</b>	Date of Birth	Capita One for in progress and cancelled stages. Snapshot data for completed and stopped stages.
<b>Age</b>	Age at the start of the AssetPlus stage	Calculated from <b>DOB</b> .
<b>Gender</b>	Gender	Capita One for in progress and cancelled stages. Snapshot data for completed and stopped stages.
<b>Ethnicity</b>	Mapped value for YJMIS	Mapped from Capita One for in progress and cancelled stages. Snapshot data for completed and stopped stages.
<b>LAC Status</b>	Current, Previous, Never or Unknown	Calculated from answers in the AssetPlus stage.
<b>Residence</b>	Local, Other or No Residence	Residence on the AssetPlus start date. Returns 'No Residence' if the stage pre-dates the earliest effective date for residence.
<b>Workgroup</b>	Managing Team	<b>View Client   Administration   Managing Team.</b>
<b>Stage Start</b>	Date	Assessment date from AssetPlus.
<b>Stage Type</b>	Text	Stage type from AssetPlus.
<b>Stage Owner</b>	User	Stage owner from AssetPlus.
<b>Stage Proxy Owner</b>	User	Stage proxy owner from AssetPlus.
<b>Stage End</b>	Date	Stage end date from AssetPlus.
<b>Stage Status</b>	In Progress, Completed, Stopped, Cancelled	Status of the AssetPlus stage.
<b>L_o_R</b>	Likelihood of reoffending	Response entered by practitioner in AssetPlus.

Field	Details	Source
<b>ROSH</b>	Risk of Serious Harm	Response entered by practitioner in AssetPlus.
<b>Safety &amp; Well</b>	Safety and Wellbeing	Response entered by practitioner in AssetPlus.
<b>Scaled App</b>	Scaled Approach	
<b>FOC</b>	Frequency of Contact	Response entered by practitioner in AssetPlus.
<b>Countersignature Details</b>	E_C: User, Date // P_P: User, Date	Where applicable, displays the name of the manager who countersigned each of the sections and the date they were completed.

## 7.2 AP Completed in Period

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release
1.1	September 2017	Code changes to improve robustness of report when managing migrated data. Added Service Centre for local report writers to bring the field in, if required.

This report provides the basic details of completed AssetPlus stages with an Assessment End Date within a user-defined time period.

### Parameters

Parameter	Type	Details
<b>Period Start</b>	Date	Start of the time period for the analysis (the report includes stages completed after this date and before the <b>Period End</b> date).
<b>Period End</b>	Date	End of the time period for the analysis (the report includes stages completed before this date but after the <b>Period Start</b> date).
<b>Residence Status</b>	Drop-down	Residence status on the start date of the assessment ( <b>YJ Case   Summary   YJ Residence Status</b> ).
<b>Enter Workgroup</b>	Text	Free text field. If required, enter a workgroup to return only clients for whom the workgroup is responsible ( <b>Client View   Administration   Managing Team</b> ). Defaults to N/A to return all clients.
<b>Enter Report View</b>	Drop-down	Enables the choice between a formatted view for reporting to managers, or a data only view for exporting to a spreadsheet for further manipulation.

### Fields

Field	Details	Source
<b>ONE ID</b>	Person ID	Snapshot data.
<b>Fullname</b>	Surname, Forename	Snapshot data.
<b>DOB</b>	Date of Birth	Snapshot data.
<b>Age</b>	Age at the end of the AssetPlus stage	Calculated from <b>DOB</b> .
<b>Gender</b>	Gender	Snapshot data.

Field	Details	Source
<b>Ethnicity</b>	Mapped value for YJMIS	Mapped from snapshot data.
<b>LAC Status</b>	Current, Previous, Never or Unknown	Calculated from answers in the AssetPlus stage.
<b>Residence</b>	Local, Other or No Residence	Residence on the AssetPlus end date. Returns 'No Residence' if the stage pre-dates the earliest effective date for residence.
<b>Workgroup</b>	Managing Team	<b>View Client   Administration   Managing Team.</b>
<b>Stage Start</b>	Date	Assessment date from AssetPlus.
<b>Stage Type</b>	Text	Stage type from AssetPlus.
<b>Stage Owner</b>	User	Stage owner from AssetPlus.
<b>Stage Proxy Owner</b>	User	Stage proxy owner from AssetPlus.
<b>Stage End</b>	Date	Stage end date from AssetPlus.
<b>Days Open</b>	Calendar days	
<b>Countersignature Details</b>	E_C: User, Date // P_P: User, Date	Where applicable, displays the name of the manager who countersigned each of the sections and the date they were completed.
<b>L_o_R</b>	Likelihood of reoffending	Response entered by practitioner in AssetPlus.
<b>ROSH</b>	Risk of Serious Harm	Response entered by practitioner in AssetPlus.
<b>Safety &amp; Well</b>	Safety and Wellbeing	Response entered by practitioner in AssetPlus.
<b>Scaled App</b>	Scaled Approach	
<b>FOC</b>	Frequency of Contact	Response entered by practitioner in AssetPlus.
<b>Stage End Note</b>	Large Text Field	The notes entered by the user who completed the stage.

## 7.3 AP Current Stages

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release
1.1	September 2017	Code changes to improve robustness of report when managing migrated data. Added Service Centre for local report writers to bring the field in, if required. Improvements made to formulas when dealing with blank values.

This report provides basic details of current AssetPlus stages, including information on requests for countersignatures, and completed countersignatures.

### Parameters

Parameter	Type	Details
<b>Residence Status</b>	Drop-down	Residence status on the start date of the assessment ( <b>YJ Case   Summary   YJ Residence Status</b> ).



Parameter	Type	Details
<b>Enter Workgroup</b>	Text	Free text field. If required, enter a workgroup to only return clients for whom the workgroup is responsible ( <b>Client View   Administration   Managing Team</b> ). Defaults to N/A to return all clients.
<b>Enter Report View</b>	Drop-down	Enables the choice between a formatted view for reporting to managers, or a data only view for exporting to a spreadsheet for further manipulation.

## Summary

The summary cross tab lists the number of stages that have been open for the following periods of time:

- 0-7 days
- 8-14 days
- 15-21 days
- 22-28 days
- 28 days or longer.

## Fields

Field	Details	Source
<b>ONE ID</b>	Person ID	Live Capita One data.
<b>Fullname</b>	Surname, Forename	Live Capita One data.
<b>DOB</b>	Date of Birth	Live Capita One data.
<b>Age</b>	Age at the start of the AssetPlus stage	Calculated from <b>DOB</b> .
<b>Gender</b>	Gender	Live Capita One data.
<b>Ethnicity</b>	Mapped value for YJMIS	Mapped from live Capita One data.
<b>LAC Status</b>	Current, Previous, Never or Unknown	Calculated from answers in the AssetPlus stage.
<b>Residence</b>	Local, Other or No Residence	Residence on the AssetPlus start date. Returns 'No Residence' if the stage pre-dates the earliest effective date for residence.
<b>Workgroup</b>	Managing Team	<b>View Client   Administration   Managing Team.</b>
<b>Stage Start</b>	Date	Assessment date from AssetPlus.
<b>Stage Type</b>	Text	Stage type from AssetPlus.
<b>Stage Owner</b>	User	Stage owner from AssetPlus.
<b>Stage Proxy Owner</b>	User	Stage proxy owner from AssetPlus.
<b>Days Open</b>	Calendar days	
<b>L_o_R</b>	Likelihood of reoffending	Response entered by practitioner in AssetPlus.

Field	Details	Source
<b>ROSH</b>	Risk of Serious Harm	Response entered by practitioner in AssetPlus.
<b>Safety &amp; Well</b>	Safety and Wellbeing	
<b>Scaled App</b>	Scaled Approach	
<b>E&amp;C Signoff Requested</b>	User, Date	Details of the user who requested signoff for E&C, and the date they did so.
<b>E&amp;C Days since request</b>	Calendar days	Time elapsed between the signoff request and the date the report is run.
<b>E&amp;C Managers who can sign</b>	List of Users	List of all users who are in the system as managing the user who requested signoff.
<b>E&amp;C Countersignature</b>	User, Date	If E&C has been signed off, this details the user and the date of signoff.
<b>P&amp;P Signoff Requested</b>	User, Date	Details of the user who requested signoff for E&C, and the date they did so.
<b>P&amp;P Days since request</b>	Calendar days	Time elapsed between the signoff request and the date the report is run.
<b>P&amp;P Managers who can sign</b>	List of Users	List of all users who are in the system as managing the user who requested signoff.
<b>P&amp;P Countersignature</b>	User, Date	If P&P has been signed off, this details the user and the date of signoff.

## 7.4 AP Cancelled Stages

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release
1.1	September 2017	Code changes to improve robustness of report when managing migrated data. Added Service Centre for local report writers to bring the field in, if required.

This report provides basic details of cancelled stages with an Assessment End Date within a user-defined time period.

### Parameters

Parameter	Type	Details
<b>Period Start</b>	Date	Start of the time period for the analysis (the report includes stages cancelled after this date and before the <b>Period End</b> date).
<b>Period End</b>	Date	End of the time period for the analysis (the report includes stages cancelled before this date but after the <b>Period Start</b> date).
<b>Residence Status</b>	Drop-down	Residence status on the start date of the assessment ( <b>YJ Case   Summary   YJ Residence Status</b> ).
<b>Enter Workgroup</b>	Text	Free text field. If required, enter a workgroup to only return clients for whom the workgroup is responsible ( <b>Client View   Administration   Managing Team</b> ). Defaults to N/A to return all clients.

Parameter	Type	Details
<b>Enter Report View</b>	Drop-down	Enables the choice between a formatted view for reporting to managers, or a data only view for exporting to a spreadsheet for further manipulation.

## Summary

The summary cross tab lists the number of stages that were open for the following periods of time:

- 0-7 days
- 8-14 days
- 15-21 days
- 22-28 days
- Over 28 days.

## Fields

Field	Details	Source
<b>ONE ID</b>	Person ID	Live Capita One data.
<b>Fullname</b>	Surname, Forename	Live Capita One data.
<b>DOB</b>	Date of Birth	Live Capita One data.
<b>Age</b>	Age at the end of the AssetPlus stage	Calculated from <b>DOB</b> .
<b>Gender</b>	Gender	Live Capita One data.
<b>Ethnicity</b>	Mapped value for YJMIS	Mapped from live Capita One data.
<b>LAC Status</b>	Current, Previous, Never or Unknown	Calculated from answers in the AssetPlus stage.
<b>Residence</b>	Local, Other or No Residence	Residence on the AssetPlus end date Returns 'No Residence' if the stage pre-dates the earliest effective date for residence.
<b>Workgroup</b>	Managing Team	<b>View Client   Administration   Managing Team.</b>
<b>Stage Start</b>	Date	Assessment date from AssetPlus.
<b>Stage Type</b>	Text	Stage type from AssetPlus.
<b>Stage Owner</b>	User	Stage owner from AssetPlus.
<b>Stage Proxy Owner</b>	User	Stage proxy owner from AssetPlus.
<b>Stage End</b>	Date	Stage end date from AssetPlus.
<b>Days Open</b>	Calendar days	
<b>Stage End Note</b>	Large Text Field	The notes entered by the user who cancelled the stage.

## 7.5 AP Stopped Stages

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release
1.1	September 2017	Code changes to improve robustness of report when managing migrated data. Added Service Centre for local report writers to bring the field in, if required.

This report provides basic details of stopped stages with an Assessment End Date within a user-defined time period.

### Parameters

Parameter	Type	Details
<b>Period Start</b>	Date	Start of the time period for the analysis (the report includes stages stopped after this date and before the <b>Period End</b> date).
<b>Period End</b>	Date	End of the time period for the analysis (the report includes stages stopped before this date but after the <b>Period Start</b> date).
<b>Residence Status</b>	Drop-down	Residence status on the start date of the assessment ( <b>YJ Case   Summary   YJ Residence Status</b> ).
<b>Enter Workgroup</b>	Text	Free text field. If required, enter a workgroup to only return clients for whom the workgroup is responsible ( <b>Client View   Administration   Managing Team</b> ). Defaults to N/A to return all clients.
<b>Enter Report View</b>	Drop-down	Enables the choice between a formatted view for reporting to managers, or a data only view for exporting to a spreadsheet for further manipulation.

### Summary

The summary cross tab lists the number of stages that were open for the following periods of time:

- 0-7 days
- 8-14 days
- 15-21 days
- 22-28 days
- 28 days or longer.

### Fields

Field	Details	Source
<b>ONE ID</b>	Person ID	Snapshot data.
<b>Fullname</b>	Surname, Forename	Snapshot data.
<b>DOB</b>	Date of Birth	Snapshot data.
<b>Age</b>	Age at the end of the AssetPlus stage	Calculated from <b>DOB</b> .
<b>Gender</b>	Gender	Snapshot data.
<b>Ethnicity</b>	Mapped value for YJMIS	Mapped from snapshot data.

Field	Details	Source
<b>LAC Status</b>	Current, Previous, Never or Unknown	Calculated from answers in the AssetPlus stage.
<b>Residence</b>	Local, Other or No Residence	Residence on the AssetPlus end date. Returns 'No Residence' if the stage pre-dates the earliest effective date for residence.
<b>Workgroup</b>	Managing Team	<b>View Client   Administration   Managing Team.</b>
<b>Stage Start</b>	Date	Assessment date from AssetPlus.
<b>Stage Type</b>	Text	Stage type from AssetPlus.
<b>Stage Owner</b>	User	Stage owner from AssetPlus.
<b>Stage Proxy Owner</b>	User	Stage proxy owner from AssetPlus.
<b>Stage End</b>	Date	Stage end date from AssetPlus.
<b>Days Open</b>	Calendar days	
<b>Stage End Note</b>	Large Text Field	The notes entered by the user who stopped the stage.

## 7.6 AP Transition Report

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release
1.1	September 2017	Code changes to improve robustness of report when managing migrated data. Added Service Centre for local report writers to bring the field in, if required.

This report provides an analysis of Youth Justice cases that were open on a user-specified date. It compares the last Asset risk levels to the first AssetPlus risk levels. It only includes completed stages.

### Parameters

Parameter	Type	Details
<b>Analysis Date</b>	Date	Single date. YJ cases active on this date are included in the report.
<b>Residence Status</b>	Drop-down	Residence status on the start date of the assessment ( <b>YJ Case   Summary   YJ Residence Status</b> ).
<b>Enter Workgroup</b>	Text	Free text field. If required, enter a workgroup to only return clients for whom the workgroup is responsible ( <b>Client View   Administration   Managing Team</b> ). Defaults to N/A to return all clients.
<b>Enter Report View</b>	Drop-down	Enables the choice between a formatted view for reporting to managers, or a data only view for exporting to a spreadsheet for further manipulation.

## Summary

The summary note lists the number of cases active on the specified date, and how many of these have both an Asset and an AssetPlus. It indicates how many cases have scores that have decreased, increased or stayed the same in the transition from Asset to AssetPlus as follows:

	Decreased	Stayed the Same	Increased
Risk Of Serious Harm	1	1	0
Vulnerability / Safety & Wellbeing	1	1	0
Scaled Approach	1	1	0

## Fields

Field	Details	Source
<b>ONE ID</b>	Person ID	Live Capita One data.
<b>Fullname</b>	Surname, Forename	Live Capita One data.
<b>DOB</b>	Date of Birth	Live Capita One data.
<b>Age</b>	Age at the Analysis date	Calculated from <b>DOB</b> .
<b>Gender</b>	Gender	Live Capita One data.
<b>Ethnicity</b>	Mapped value for YJMIS	Mapped from live Capita One data.
<b>LAC Status</b>	Current, Previous, Never or Unknown	Calculated from answers in the AssetPlus stage where applicable.
<b>Residence</b>	Local, Other or No Residence	Residence on the analysis date. Returns 'No Residence' if the analysis date pre-dates the earliest effective date for residence.
<b>Workgroup</b>	Managing Team	<b>View Client   Administration   Managing Team.</b>
<b>Asset Date</b>	Date	The assessment date for the last created Asset Core Profile.
<b>Asset Author</b>	User	Author of the Asset.
<b>ROSH (Asset)</b>	Low, Medium, High, Very High, None	ROSH score from the last Asset.
<b>Vulnerability (Asset)</b>	Low, Medium, High, Very High, None	Vulnerability score from the last Asset.
<b>Scaled Approach (Asset)</b>	Standard, Enhanced, Intensive, Blank	
<b>APIus Date</b>	Date	The start date for the first created and completed AssetPlus stage.
<b>APIus Author</b>	User	Stage owner.
<b>ROSH (APIus)</b>	Low, Medium, High, Very High, None	Practitioner-recorded ROSH level.
<b>Safety/Wellbeing (APIus)</b>	Low, Medium, High, Very High, None	Practitioner-recorded Safety and Wellbeing level.
<b>Scaled Approach (APIus)</b>	Standard, Enhanced, Intensive, Blank	Practitioner-recorded Scaled Approach level.

Field	Details	Source
Likelihood Reoffending (APlus)	Low, Medium, High, Very High, None	Practitioner-recorded Likelihood of Reoffending.

## 7.7 AP ‘Yet to Clarify’ Analysis

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release
1.1	September 2017	Code changes to improve robustness of report when managing migrated data. Added Service Centre for local report writers to bring the field in, if required.

This report provides an analysis of all AssetPlus stages that were completed in a user-defined time period, with a basic aggregation of how many times ‘Yet to Clarify’ was entered for eligible questions.

### Parameters

Parameter	Type	Details
Period Start	Date	Start of the time period for the analysis (the report includes stages completed after this date and before the <b>Period End</b> date).
Period End	Date	End of the time period for the analysis (the report includes stages completed before this date but after the <b>Period Start</b> date).
Enter Question	Drop-down	List of all the questions that can be answered ‘Yet to Clarify’. This filters the results to that question only and shows the stages where the question was answered ‘Yet to Clarify’.  The report can run against all questions or a single one.
Residence Status	Drop-down	Residence status on the start date of the assessment ( <b>YJ Case   Summary   YJ Residence Status</b> ).
Enter Workgroup	Text	Free text field. If required, enter a workgroup to return only clients for whom the workgroup is responsible ( <b>Client View   Administration   Managing Team</b> ).  Defaults to N/A to return all clients.
Enter Report View	Drop-down	Enables the choice between a formatted view for reporting to managers, or a data only view for exporting to a spreadsheet for further manipulation.
Enter Worker	Text	Free text field. If required, enter a user’s name to filter the results to display only stages owned by that user. The name must match the user’s name as recorded in Capita One <u>exactly</u> .  Defaults to ‘N/A’ to return all stages.

### Summary

The summary section lists each question for which ‘Yet to Clarify’ is a possible response in AssetPlus. It is organised by framework section, and the questions are listed by order of appearance in the framework. Next to each question is the number of times that a ‘Yet to Clarify’ response has been recorded for that question across all stages meeting the selection parameters. If the question has never been answered in any of the included stages, there is no number next to it.

## Fields

Only basic stage information is shown, as there are too many questions for all the answers to be listed in the result set. The report calculates information for the summary in the background.

Field	Details	Source
ONE ID	Person ID	Snapshot data.
Fullname	Surname, Forename	Snapshot data.
DOB	Date of Birth	Snapshot data.
Age	Age at the Analysis date	Calculated from <b>DOB</b> .
Gender	Gender	Snapshot data.
Ethnicity	Mapped value for YJMIS	Mapped from snapshot data.
LAC Status	Current, Previous, Never or Unknown	Calculated from answers in the AssetPlus stage.
Residence	Local, Other or No Residence	Residence on the stage end date. Returns 'No Residence' if the stage pre-dates the earliest effective date for residence.
Workgroup	Managing Team	<b>View Client   Administration   Managing Team.</b>
Stage Start	Date	Assessment date from AssetPlus.
Stage Type	Text	Stage type from AssetPlus
Stage Owner	User	Stage owner from AssetPlus.
Stage Proxy Owner	User	Stage proxy owner from AssetPlus.
Stage End	Date	Stage end date from AssetPlus.

## 7.8 AP Risk Analysis

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release
1.1	September 2017	Code changes to improve robustness of report when managing migrated data. Added Service Centre for local report writers to bring the field in, if required. Improvements made to formulas when dealing with blank values.

This report provides an analysis of all AssetPlus stages that were completed in a user-defined time period, comparing system-generated risk levels with user-defined overrides, as well as containing details of other risk-related concerns.

### Parameters

Parameter	Type	Details
Period Start	Date	Start of the time period for the analysis (the report includes stages completed after this date and before the <b>Period End</b> date).
Period End	Date	End of the time period for the analysis (the report includes stages completed before this date but after the <b>Period Start</b> date).



Parameter	Type	Details
<b>Residence Status</b>	Drop-down	Residence status on the start date of the assessment ( <b>YJ Case   Summary   YJ Residence Status</b> ).
<b>Enter Workgroup</b>	Text	Free text field. If required, enter a workgroup to return only clients for whom the workgroup is responsible ( <b>Client View   Administration   Managing Team</b> ). Defaults to N/A to return all clients.
<b>Enter Report View</b>	Drop-down	Enables the choice between a formatted view for reporting to managers, or a data only view for exporting to a spreadsheet for further manipulation.

## Summary

The summary section provides tables and cross tabs for:

- The difference between system-generated Likelihood of Reoffending and Scaled Approach, and Practitioner scores.
- ROSH levels.
- Safety and Wellbeing levels.
- MAPPA Level and Category.
- Dangerousness.

## Fields

Field	Details	Source
<b>ONE ID</b>	Person ID	Snapshot data.
<b>Fullname</b>	Surname, Forename	Snapshot data.
<b>DOB</b>	Date of Birth	Snapshot data.
<b>Age</b>	Age at the end of the AssetPlus stage	Calculated from <b>DOB</b> .
<b>Gender</b>	Gender	Snapshot data.
<b>Ethnicity</b>	Mapped value for YJMIS	Mapped from snapshot data.
<b>LAC Status</b>	Current, Previous, Never or Unknown	Calculated from answers in the AssetPlus stage.
<b>Residence</b>	Local, Other or No Residence	Residence on the AssetPlus end date. Returns 'No Residence' if the stage pre-dates the earliest effective date for residence.
<b>Workgroup</b>	Managing Team	<b>View Client   Administration   Managing Team.</b>
<b>Stage Start</b>	Date	Assessment date from AssetPlus.
<b>Stage Type</b>	Text	Stage type from AssetPlus.
<b>Stage Owner</b>	User	Stage owner from AssetPlus.
<b>Stage Proxy Owner</b>	User	Stage Proxy Owner from AssetPlus.
<b>Stage End</b>	Date	Stage End date from AssetPlus.

Field	Details	Source
ROSH	Risk of Serious Harm	Response entered by practitioner in AssetPlus.
Safety & Well	Safety and Wellbeing	Response entered by practitioner in AssetPlus.
YOGRS	Numeric	Value calculated by the system in AssetPlus.
Indicative L_o_R	Likelihood of reoffending based on YOGRS	Value calculated by the system in AssetPlus.
L_o_R	Likelihood of reoffending	Response entered by practitioner in AssetPlus.
Indicative SA	Scaled approach based on L_o_R	Value calculated by the system in AssetPlus.
Scaled Approach	Scaled Approach Intervention Level	Response entered by practitioner in AssetPlus.
MAPPA Level	Level 1,2 or 3	Response entered by practitioner in AssetPlus.
MAPPA Category	Registered Sexual Offender, Violent offender or other sexual offender or Other Dangerous Offenders.	Response entered by practitioner in AssetPlus.
Dangerousness	No, Yes or Yet to clarify [An assessment of dangerousness is required?]	Response entered by practitioner in AssetPlus.

## 7.9 AP Safety Wellbeing Analysis

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release
1.1	September 2017	Code changes to improve robustness of report when managing migrated data. Added Service Centre for local report writers to bring the field in, if required.

This report provides an analysis of all AssetPlus stages that were completed in a user-defined time period, and includes details of concerns related to safety and wellbeing.

### Parameters

Parameter	Type	Details
Period Start	Date	Start of the time period for the analysis (the report includes stages completed after this date and before the <b>Period End</b> date).
Period End	Date	End of the time period for the analysis (the report includes stages completed before this date but after the <b>Period Start</b> date).
Residence Status	Drop-down	Residence status on the start date of the assessment ( <b>YJ Case   Summary   YJ Residence Status</b> ).
Enter Workgroup	Text	Free text field. If required, enter a workgroup to only return clients for whom the workgroup is responsible ( <b>Client View   Administration   Managing Team</b> ). Defaults to N/A to return all clients.

Parameter	Type	Details
<b>Enter Report View</b>	Drop-down	Enables the choice between a formatted view for reporting to managers, or a data only view for exporting to a spreadsheet for further manipulation.

## Summary

The summary section provides tables and cross tabs for:

- Safety and Wellbeing levels
- Social Care Involvement
- Physical Health Concerns
- Speech Language Communication and Neuro-disability Concerns
- Emotional and Mental Health concerns.

It also provides a basic summary of the number of young people with substance misuse issues or who are at risk of sexual exploitation.

## Fields

Field	Details	Source
<b>ONE ID</b>	Person ID	Snapshot data.
<b>Fullname</b>	Surname, Forename	Snapshot data.
<b>DOB</b>	Date of Birth	Snapshot data.
<b>Age</b>	Age at the end of the AssetPlus stage	Calculated from <b>DOB</b> .
<b>Gender</b>	Gender	Snapshot data.
<b>Ethnicity</b>	Mapped value for YJMIS	Mapped from snapshot data.
<b>LAC Status</b>	Current, Previous, Never or Unknown	Calculated from answers in the AssetPlus stage.
<b>Residence</b>	Local, Other or No Residence	Residence on the AssetPlus end date. Returns 'No Residence' if the stage pre-dates the earliest effective date for residence.
<b>Workgroup</b>	Managing Team	<b>View Client   Administration   Managing Team.</b>
<b>Stage Start</b>	Date	Assessment date from AssetPlus.
<b>Stage Type</b>	Text	Stage type from AssetPlus.
<b>Stage Owner</b>	User	Stage owner from AssetPlus.
<b>Stage Proxy Owner</b>	User	Stage proxy owner from AssetPlus.
<b>Stage End</b>	Date	Stage end date from AssetPlus.
<b>Safety &amp; Well</b>	Safety and Wellbeing	Response entered by practitioner in AssetPlus.
<b>LAC</b>	Care history	Calculated from the combination of answers relevant to LAC status (accommodated, care order, remand to LAA and remand to YDA).

Field	Details	Source
CP	Child Protection Plan	Response entered by practitioner in AssetPlus.
CIN	Child In Need Plan	Response entered by practitioner in AssetPlus.
Phys Health	Number	Total number of 'Yes' answers across the six physical health questions in AssetPlus.
SLCN	Number	Total number of 'Yes' answers across the 21 SLCN questions in AssetPlus.
Emotional / MH	Number	Total number of 'Yes' answers across the 15 emotional health questions in AssetPlus.
CSE Risk	Child at risk of sexual exploitation	Response entered by practitioner in AssetPlus.
Substance Use	Substance abuse	Response entered by practitioner in AssetPlus.

## 7.10 AP Desistance

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release
1.1	September 2017	Code changes to improve robustness of report when managing migrated data. Added Service Centre for local report writers to bring the field in, if required.

This report provides an analysis of all AssetPlus stages that were completed in a user-defined time period, including an aggregation of Categories, and the number of instances for and against desistance.

### Parameters

Parameter	Type	Details
Period Start	Date	Start of the time period for the analysis (the report includes stages completed after this date and before the <b>Period End</b> date).
Period End	Date	End of the time period for the analysis (the report includes stages completed before this date but after the <b>Period Start</b> date).
Residence Status	Drop-down	Residence status on the start date of the assessment ( <b>YJ Case   Summary   YJ Residence Status</b> ).
Enter Workgroup	Text	Free text field. If required, enter a workgroup to only return clients for whom the workgroup is responsible ( <b>Client View   Administration   Managing Team</b> ). Defaults to N/A to return all clients.
Enter Report View	Drop-down	Enables the choice between a formatted view for reporting to managers, or a data only view for exporting to a spreadsheet for further manipulation.

### Summary

The summary section provides a cross tab listing all AssetPlus desistance factor categories used by the stages completed in the relevant time period. Against these categories is a record of

the number of times each was used, divided into **For** and **Against**, and the ratings attributed to each, for example:

	Total	Against				For			
		Total		Moderate	Potential	Total		Moderate	Potential
Attitudes of Offending/Behaviours	2	0	0	0	0	2	0	0	2
Emotional development and mental health	1	0	0	0	0	1	0	1	0
Family and wider networks	1	1	0	0	1	0	0	0	0
How the young person relates to others	1	1	1	0	0	0	0	0	0
Living arrangements, housing and financial considerations	2	2	0	2	0	0	0	0	0
Self-identity	1	0	0	0	0	1	1	0	0

## Fields

This is the only report where grouping is provided in the main formatted view. This is because there are multiple desistance factors for each stage in the report.

Field	Details	Source
<b>Name &amp; Stage Summary</b>	Name, stage start date and stage type as a 'title' for each group entry	Snapshot data.
<b>Stage Owner</b>	User	Stage owner from AssetPlus.
<b>Stage Proxy Owner</b>	User	Stage proxy owner from AssetPlus.
<b>ONE ID</b>	Person ID	Snapshot data.
<b>DOB</b>	Date of Birth	Snapshot data.
<b>Age</b>	Age at the end of the AssetPlus stage	Calculated from <b>DOB</b> .
<b>Gender</b>	Gender	Snapshot data.
<b>Ethnicity</b>	Mapped value for YJMIS	Mapped from snapshot data.
<b>LAC Status</b>	Current, Previous, Never or Unknown	Calculated from answers in the AssetPlus stage.
<b>Residence</b>	Local, Other or No Residence	Residence on the AssetPlus end date. Returns 'No Residence' if the stage pre-dates the earliest effective date for residence.
<b>Workgroup</b>	Managing Team	<b>View Client   Administration   Managing Team.</b>
<b>For/Against</b>	For or Against	For each desistance factor.
<b>Category</b>		Response entered by practitioner in AssetPlus.
<b>Rating</b>		Response entered by practitioner in AssetPlus.

## 7.11 Offences

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release
1.1	September 2017	Code changes to improve robustness of report when managing migrated data. Added Service Centre for local report writers to bring the field in, if required.

## Client Context: AP 'Yet to Clarify'

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release

### Parameters

The report is a client context report, and therefore there are no parameters. It shows details of either the stage currently in progress, if applicable, or the one most recently completed. It disregards stopped and cancelled stages.

### Aggregation

The report header displays a brief synopsis of the stage details. The report lists all questions with 'Yet to Clarify' as a potential response, and a numerical value:

- 0: The question was not answered with 'Yet to Clarify'.
- 1: The question was answered with 'Yet to Clarify'.
- 2: The question occurs multiple times in the assessment and has been answered 'Yet to Clarify' on more than one occasion.

If there is no value next to the question, i.e. if it is blank, there was no response recorded against the question in the AssetPlus stage.

## Client Context: Sentencing History

Version	Date Released	Notes / Changes
1.0	June 2017	Initial release

### Parameters

The report is as a client context report, and therefore there are no parameters. It replaces the older YJ Convictions report, with the following improvements:

- Results are in chronological order, starting with the earliest (similar to PNC printout).
- Pre-court decisions resulting in a substantive outcome are included.
- Results only include hearings where the **Court Action** value is Sentenced. Adjournments and other non-sentence actions are disregarded, as are sentencing hearings marked as Other due to appeals quashing a conviction or sentence.
- Results display full details of outcomes, requirements, compensation/victim surcharge/costs and pleas per offence.
- Results also show hearing notes for each entry.

## **Aggregation**

The report header displays a simple aggregation of each hearing and pre-court decision. The offences, with plea, compensation and any outcomes and requirements are listed below. Hearings also have costs, victim surcharges and hearing notes listed.

## 20 | One to One Document Templates

Documents used for individual client contacts are known as one to one documents. Templates for these documents are configured within the One IYSS System Administration Client. In order to increase performance for users accessing the documents facility through an internet browser, any images or logos on the templates should be kept to a small size.

One to one document templates can be grouped together into categories or types, e.g. Tracking Letters, Action Plans.

### Creating a Template Category

To create a new template category:

1. In the One IYSS System Administration Client, select **Documents & Paragraphs | Document Type**.
2. Click the **Add Value** icon to display the **Document Type** dialog.

3. Enter a name for the template category in the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Select the **Service** to which the template applies from the drop-down.
6. From the **Entity Type** drop-down, select the records to which this template applies.
7. Click the **OK** button to save the changes and close the dialog.

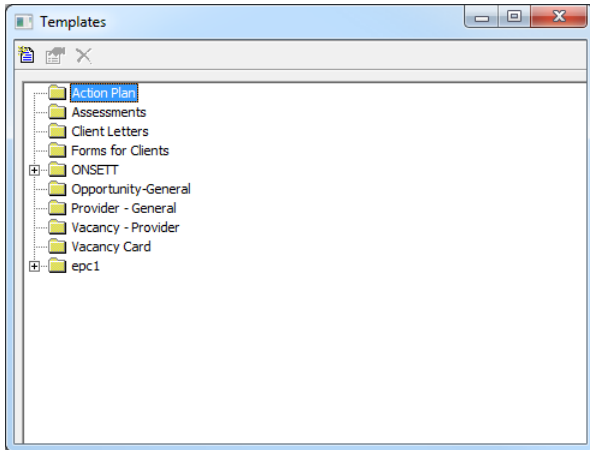
**NOTE:** Do not enter anything in the **Merge Field(s)** field.



## Uploading a Template

Create the template in Microsoft Word and save it as a .doc file (.docx is not supported). To upload it to One IYSS:

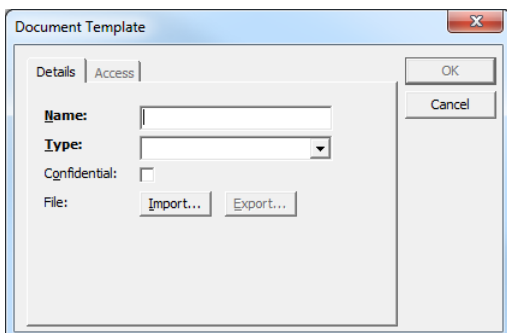
1. In the One IYSS System Administration Client, select **File | Document Templates** to display the **Templates** dialog.



2. Click the **New Document Template** icon to display the **Document Template** dialog.

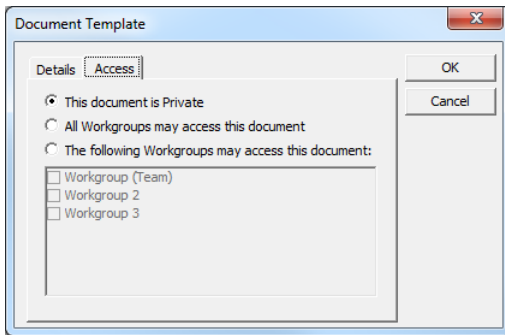


*New Document Template Icon*



3. Enter a **Name** for the template.
4. Select a template category from the **Type** drop-down.
5. If required, select the **Confidential** check box.
6. Click the **Import** button to display a file browser dialog.
7. Locate the required file on your computer.
8. Double-click the file to select it for import and return to the **Document Template** dialog.

9. Click the **Access** tab to display the accessibility options.

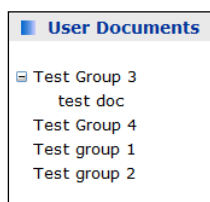


10. Select the appropriate radio button for the required level of access.
11. If the template is workgroup specific, select the appropriate workgroups to grant them access to the document.
12. Click the **OK** button to save the changes and close the dialog.

## 21 | User Document Management

Documents can be uploaded to One IYSS and organised into folders for users to access. This enables users from multiple organisations to access a universal set of documents without the need for distribution through each organisation's intranet.

Documents are listed under their parent document group in the **User Documents** screen in the One IYSS web application (**my homepage | Useful Links | View Documents**).

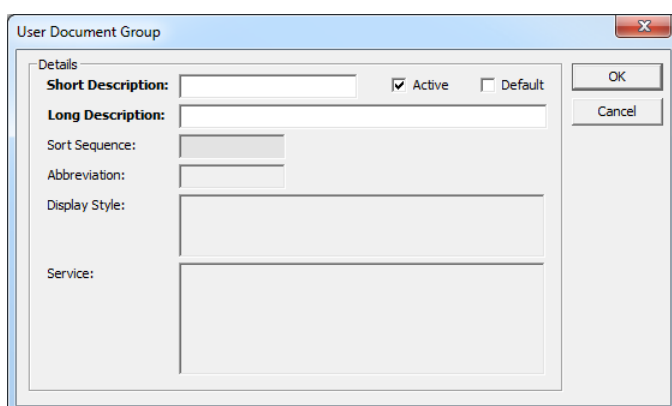


Before a document can be imported to One IYSS, its parent document group must exist.

### Creating Document Groups

To create a new user document group:

1. In the One IYSS System Administration Client, select **Documents & Paragraphs | User Document Group**.
2. Click the **Add Value** icon to display the **User Document Group** dialog.

A screenshot of the 'User Document Group' dialog box. The dialog has a title bar with 'User Document Group' and a close button. Below the title bar is a 'Details' section. It contains several fields: 'Short Description:' with a text input field and a checked 'Active' checkbox and an unchecked 'Default' checkbox; 'Long Description:' with a text input field; 'Sort Sequence:' with a text input field; 'Abbreviation:' with a text input field; 'Display Style:' with a text input field; and 'Service:' with a text input field. On the right side of the dialog, there are 'OK' and 'Cancel' buttons.

3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Click the **OK** button to save the changes and close the dialog.

### Importing Documents to One IYSS

For more information about working with documents in One IYSS, refer to the *Youth Justice End User Guide* available on the One Publications website.

To import a document:

1. Log into the One IYSS web application.

- In the **IYSS Links** panel in **my homepage**, click the **Import User Document** hyperlink to display the **Import User Document** screen.

Name	Group	Created By	Modified On	Review Date
test doc	Test Group 3			

- Click the **new** button to display the **New User Document** screen.

- Enter a **Document Title**.
- Click the **Browse** button to display a file browser dialog.
- Locate the required document on your computer.
- Double-click the file to select it for import and return to the **New User Document** screen.
- Select the **Document Group** under which the document is to be displayed.
- Type or select from the calendar a **Review Date**

**NOTE:** Certain documents may have explicit shelf lives, but even documents not bound to particular time periods should be systematically reviewed to ensure relevance and currency are maintained.

- Click the **continue** button to import the document to One IYSS.

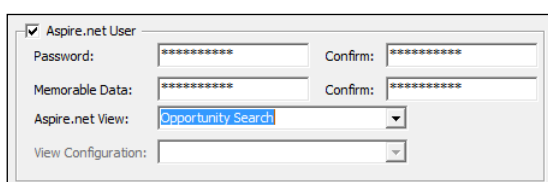
## 22 | Managing Public Opportunity Search Facilities

One IYSS enables clients to search for opportunities through a public opportunity search facility. From the search results, clients can access further information about the opportunity, save relevant opportunities to a list in order to complete the relevant application at a later time and complete an Expression of Interest form. You must configure the public opportunity search facilities to your organisation before it becomes functional.

The public opportunity search facilities access the system through the Opp Search user account.

In order for the public opportunity search facilities to work this account must:

- Be active.
- Be a member of a security group with the privileges required to view opportunities assigned.
- Have a current password and memorable data assigned.
- Have the **Aspire.net View** field set to Opportunity Search.



The screenshot shows a configuration window for an 'Aspire.net User'. It includes fields for 'Password' and 'Memorable Data', each with a 'Confirm' field. The 'Aspire.net View' dropdown is set to 'Opportunity Search'. There is also a 'View Configuration' dropdown at the bottom.

For more information on configuring user accounts, see [Managing User Accounts](#) on page 18.

**NOTE:** Public opportunity search facilities require your installation to be visible to the internet. If you cannot access One IYSS directly from the internet, you must amend your infrastructure to accommodate access to the public opportunity search facilities.

### Configuration Options

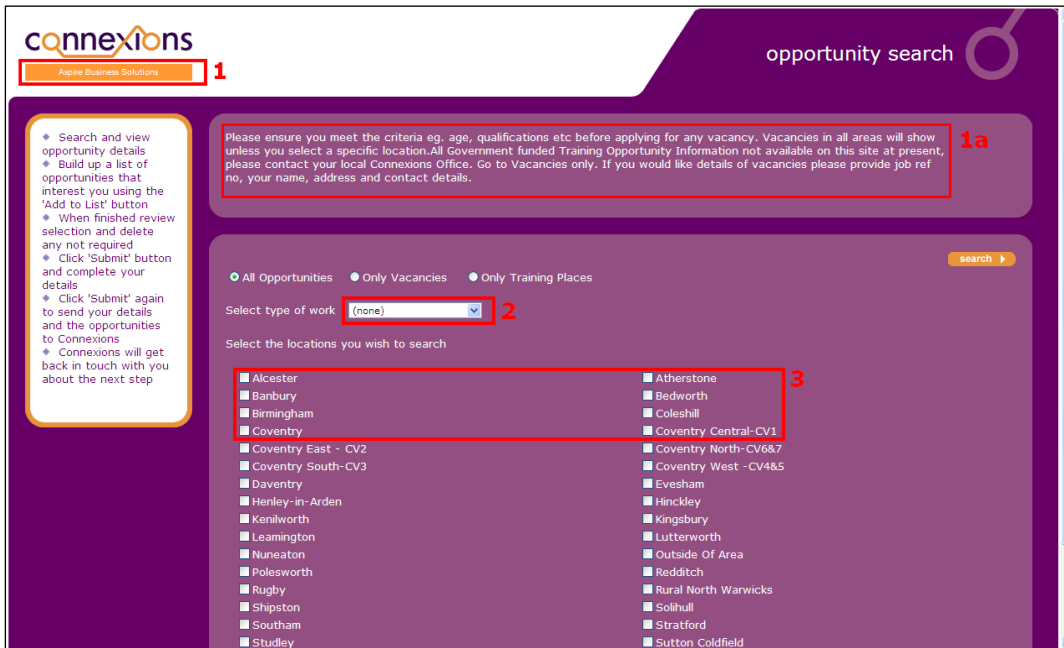
The public opportunity search facilities are available at:

<Your\_domain\IYSSNet/providerandoppsearch.aspx?aspirenetview=D5BF56DE-3BF9-4779-8D0C-5C4C54D69A62

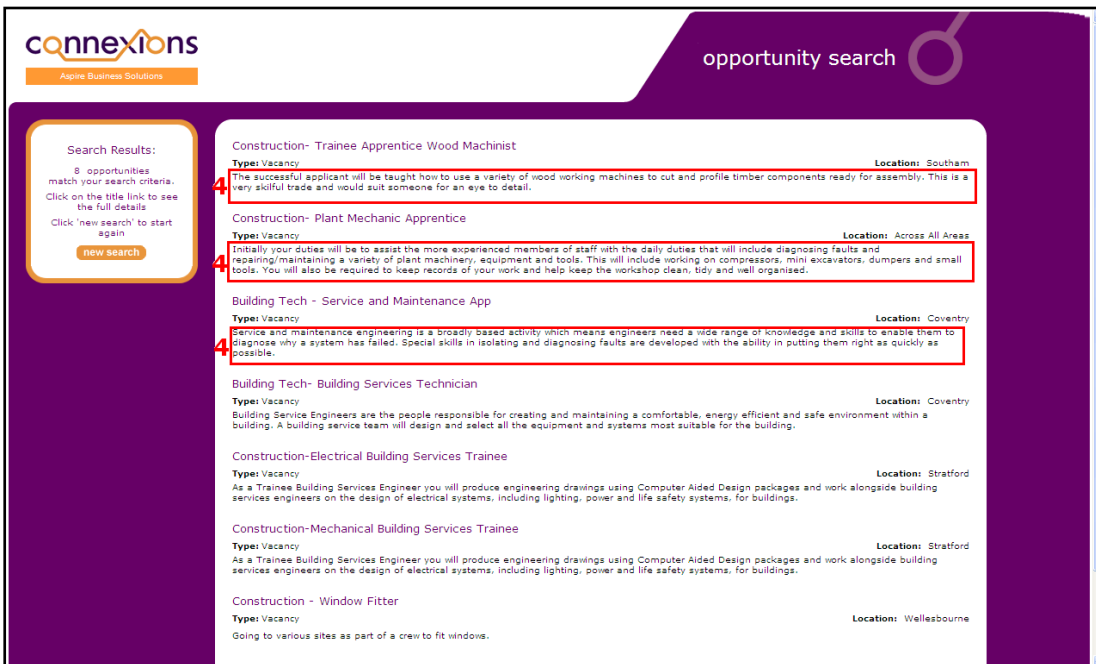
The public opportunity search facilities homepage provides the organisation name (1) and an explanatory note providing instructions for using the search facilities (1a).

A drop-down enables clients to indicate the type of work they want (2) and they can select the locations suitable for them from a list (3).

These fields should be configured to fit your organisation:



Search results are displayed with an overview of the positions (4) in the results page. The overview is a configurable element. It typically contains a brief outline of the opportunity, training included or person requirements for the role.



Clicking the position title displays the opportunity information screen, this typically includes a more detailed description of duties, training and requirements, as well as pay information (5).

## Managing Public Opportunity Search Facilities

These fields can be configured. There is also a configurable field below these sections (6) where common opportunity information is displayed.

The screenshot shows the Connexions website interface for an opportunity search. The page title is 'Construction- Plant Mechanic Apprentice'. Key details include: Type: Vacancy, Location: Across All Areas, Reference: 46144, Pay: -, Hours per week: (blank), and Age limit: None. The 'Detailed Duties' section describes assisting experienced staff with diagnosing faults and repairing machinery. The 'Training Offered' section states training will be in ten-week blocks over two years at a local college. The 'Requirements' section lists GCSE grade D or above in English, Maths, and Science. The 'Pay Details' section indicates a starting salary of £7,300PA rising to £17,000. The 'Age requirements' section specifies 16-25 years. A red box labeled '6' highlights the text 'This is common opp info' below the requirements. A red box labeled '5' highlights the 'Detailed Duties' section. A red box labeled '5' highlights the 'Training Offered' section. A red box labeled '5' highlights the 'Requirements' section. A red box labeled '5' highlights the 'Pay Details' section. A red box labeled '5' highlights the 'Age requirements' section. A red box labeled '5' highlights the 'add to list' button. A red box labeled '7' highlights the 'add to list' button. The page footer includes the Connexions logo and '© Aspire Business Solutions Ltd 2007'.

By clicking the **add to list** button, clients can select a number of different opportunities that interest them. When all desired opportunities have been added, clients complete an Expression of Interest form, which is emailed to the vacancy managing team or the user managing the particular opportunity.

Following submission, a confirmation message (7) is displayed. This can be configured by the System Administrator.

The screenshot shows the Connexions website interface after a successful application submission. The main content area displays a confirmation message: 'Your application has been sent successfully.' A red box labeled '7' highlights this message. The left sidebar contains navigation buttons: 'Click 'new search' to start again' with a 'new search' button, and 'Click 'back' to return to opportunity details' with a 'back' button. The page footer includes the Connexions logo and '© Aspire Business Solutions Ltd 2007'.

## Public Opportunity Search - Managing Configuration Options

The fields mentioned previously are configured in the One IYSS System Administration Client. To add or edit any of these fields, see the appropriate following sections.

### Company Name

**NOTE:** The careers company name is linked to your license code. Before making any changes consult One Application Support to get a new license code.

To change the name of the organisation that is displayed underneath the Connexions logo:

11. In the One IYSS System Administration Client, select **System | System Value | Company Name** to display the **System Value** dialog.

The screenshot shows a 'System Value' dialog box with a 'Details' section. The 'Description' field contains 'Company Name'. The 'Value' field is empty. There are 'OK' and 'Cancel' buttons on the right side of the dialog.

12. In the **Value** field, enter the organisation name.
13. Click the **OK** button to save the changes and close the dialog.

### Explanatory Notes

To enter an explanatory note to be displayed at the top of the search homepage:

1. In the One IYSS System Administration Client, select **System | System Value | Opp Search - Explanation Notes** to display the **System Value** dialog.

The screenshot shows a 'System Value' dialog box with a 'Details' section. The 'Description' field contains 'Opp Search - Explanation Notes'. The 'Value' field is empty. There are 'OK' and 'Cancel' buttons on the right side of the dialog.

2. In the **Value** field, enter the information to be displayed to clients.
3. Click the **OK** button to save the changes and close the dialog.

### Occupational Areas

The occupational areas that are displayed in the public opportunity search facilities are different to those used in client and opportunity records. This is to provide a more client-friendly interface and avoid SOC code terminology.

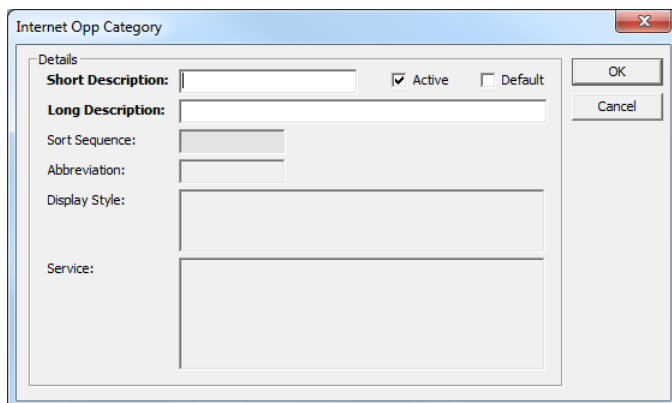
#### Adding Occupational Areas

To add public opportunity search facility occupation areas:

1. In the One IYSS System Administration Client, select **Provider & Opportunity | Internet Opp Category**.



2. Click the **Add Value** icon to display the **Internet Opp Category** dialog.

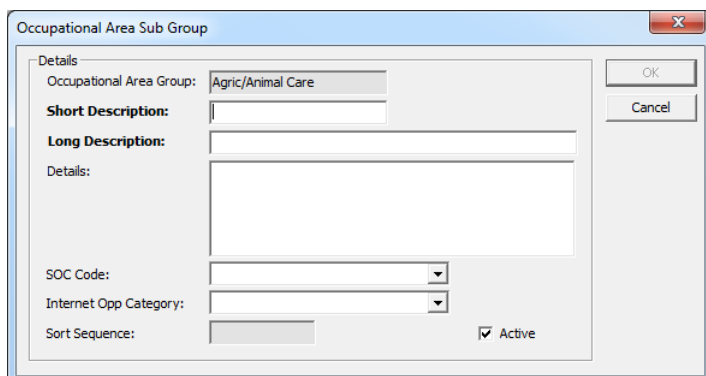


3. Complete the **Short** and **Long Description** fields.
4. Ensure the **Active** check box is selected.
5. Click the **OK** button to save the changes and close the dialog.
6. Repeat the process for each of the occupational areas you want to create.

## Mapping Job Types

To map the different job types to the internet opp category values:

1. In the One IYSS System Administration Client, select **Common | Occupational Area Group | <Occupational Area Sub Group>**.
2. Double-click the required job type to display the **Occupational Area Sub Group** dialog.



3. From the **Internet Opp Category** drop-down, select the appropriate category for the job type.
4. Click the **OK** button to save the changes and close the dialog.
5. Repeat for all occupational area sub groups.

**NOTE:** To add a new occupational area sub group, refer to [Occupational Area Sub Group](#) on page 66.

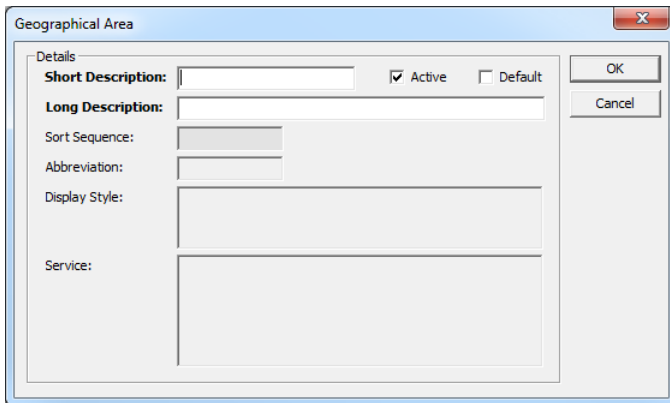
## Geographical Areas

The geographical areas that provide a list of locations clients can select in the public opportunity search facilities are also used in the **Opportunity Search** screen, client aspirations records and provider summaries.

To add a new geographical area:

1. In the One IYSS System Administration Client, select **Address | Geographical Area**.

- Click the **Add Value** icon to display the **Geographical Area** dialog.



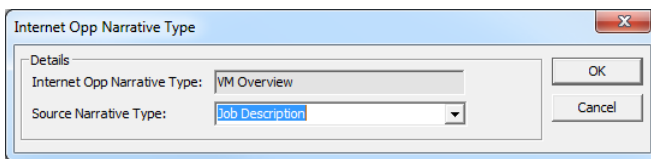
- Complete the **Short** and **Long Description** fields.
- Ensure the **Active** check box is selected.
- Click the **OK** button to save the changes and close the dialog.

## Opportunity Overview

You can select which of the opportunity narrative fields are displayed in the opportunity synopsis in the search results.

To select the opportunity narrative field to be displayed as the opportunity overview:

- In the One IYSS System Administration Client, select **Provider & Opportunity | Internet Opp Narrative Type | VM Overview** to display the **Internet Opp Narrative Type** dialog.

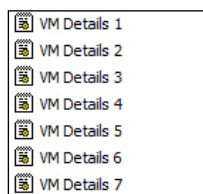


- From the **Source Narrative Type** drop-down, select the opportunity narrative to be displayed in the search results.
- Click the **OK** button to save the changes and close the dialog.

## Opportunity Narrative

You can select which opportunity narrative fields are displayed when the client selects the opportunity, and in what order they are displayed. This enables you to have narrative fields that are needed for the management of the opportunity, but not for public display.

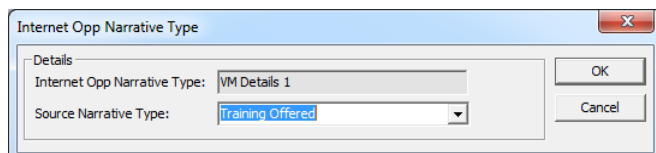
You can display up to seven fields in the opportunity information screen. The order in which they are displayed is determined by number in the Internet Opp Narrative Type value name.



**VM Details 1** is the field displayed at the top of the screen, followed by the other fields in order. You do not have to use all seven fields. You cannot add more than seven fields.

To select the **Opportunity Narrative** fields to be displayed:

1. In the One IYSS System Administration Client, select **Provider & Opportunity | Internet Opp Narrative Type**.
2. In the **Values** column, double-click **VM Details 1** to display the **Internet Opp Narrative Type** dialog.



3. From the **Source Narrative Type** drop-down, select the opportunity narrative to be displayed first in the opportunity information screen.
4. Click the **OK** button to save the changes and close the dialog.
5. Repeat the process for all other fields as appropriate.

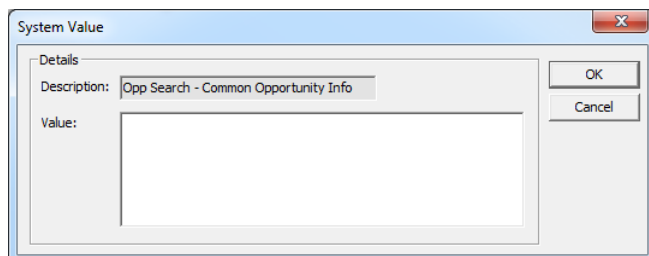
**NOTE:** To remove a field, delete the entry in the **Source Narrative Type** field in the **Internet Opp Narrative Type** dialog, and leave it blank.

## Common Opportunity Information

If required, you can place a standard statement at the bottom of every opportunity detail screen, e.g. Please ensure that you meet the qualifications and skills criteria before applying.

To configure the common opportunity information statement:

1. In the One IYSS System Administration Client, select **System | System Value | Opp Search - Common Opportunity Info** to display the **System Value** dialog.



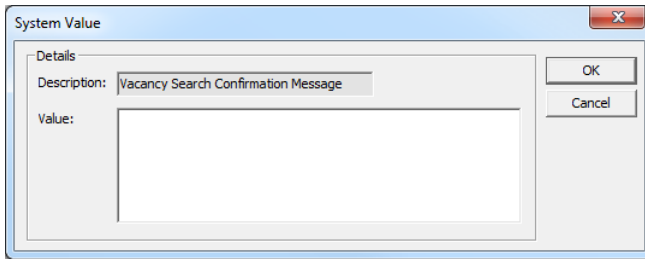
2. Enter the statement into the **Value** field.
3. Click the **OK** button to save the changes and close the dialog.

## Confirmation Message

You can customise the confirmation message that is displayed once the expression of interest form has been submitted. This may provide a timescale for responses, contact numbers or any other pertinent information, e.g. Thank you for your interest. A member of staff will be in contact within one working day. If you have any queries in the meantime please telephone 01234 567890.

To configure the confirmation message:

1. In the One IYSS System Administration Client, select **System | System Value | Vacancy Search Confirmation Message** to display the **System Value** dialog.



2. Enter the confirmation message into the **Value** field.
3. Click the **OK** button to save the changes and close the dialog.

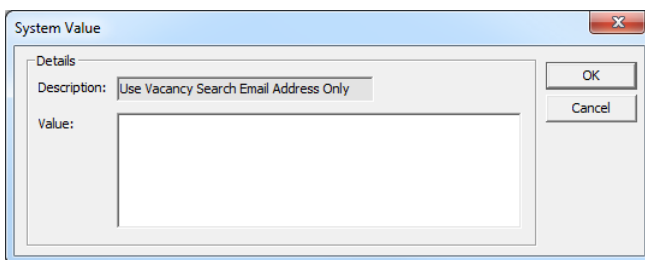
## Additional Configuration - Expression of Interest Management

When a client has completed an expression of interest form, it is emailed to either the vacancy management team or the opportunity’s managing user, depending on how you have set up the system. When determining to whom the emails should be sent, you should take into account staff absences and periods of leave to ensure the emails are still picked up while the user or users responsible are away.

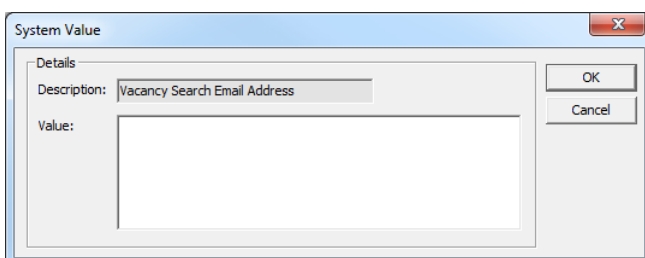
### Vacancy Management Team

To send the expression of interest forms to the email address of a team or user responsible for all vacancies:

1. In the One IYSS System Administration Client, select **System | System Value**.
2. In the **Description** column, double-click the **Use Vacancy Search Email Address Only** to display the **System Value** dialog.



3. Enter “1” in the **Value** field. This sets the Use Vacancy Search Email Address Only command to ‘true’.
4. Click the **OK** button to save the changes and close the dialog.
5. In the **Description** column, double-click the **Vacancy Search Email Address** to display the **System Value** dialog.

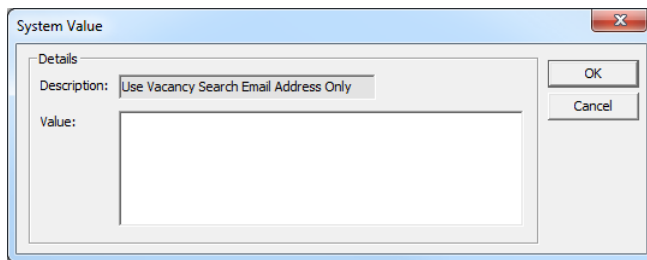


6. In the **Value** field, enter the email address of the vacancy management team.
7. Click the **OK** button to save the changes and close the dialog.

## Opportunity Managing User

To send the expression of interest forms to the email address of the user responsible for the particular opportunity:

1. Ensure that the relevant user accounts have current email addresses.
2. In the One IYSS System Administration Client, select **System | System Value**.
3. In the **Description** column, double-click the **Use Vacancy Search Email Address Only** to display the **System Value** dialog.



4. Enter "0" in the **Value** field. This sets the Use Vacancy Search Email Address Only command to 'false'.
5. Click the **OK** button to save the changes and close the dialog.

## 23 | Importing data

**NOTE:** For guidance on completing the NCCIS data export, refer to the One IYSS MI\_XML handbook, available on the One Publications website.

You can import many different kinds of data into IYSS, e.g. qualification data, starter and leaver data. Before importing a dataset, you must:

- Configure the required template.
- Ensure the dataset conforms to the template settings.
- Configure any required translations.

The way in which the template is configured depends on the nature of the data being imported. This is addressed in the data-specific sections of this chapter. For help translating the imported data, refer to [Translating Values](#) on page 158.

### Understanding Dataset Structures

If a dataset structure and the template values are not the same, the import will result in erroneous or corrupted data. If there are any issues with your data, check the appropriate **Import Template** dialog in the One IYSS System Administration Client (**Imports | Import Template**):

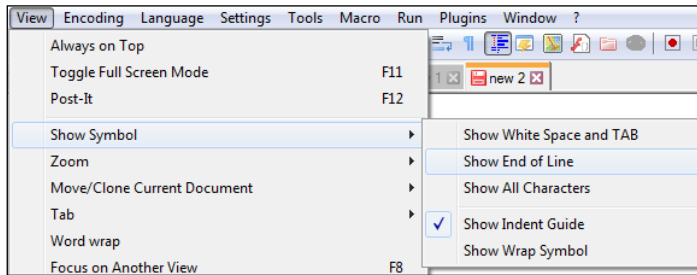
Check the following fields:

- **First Row has Headers.** If the first row in the dataset contains the column headers, this check box must be selected.
- **Row Delimiter.** There are three options in this drop-down:
  - CR, LF
  - CR
  - LF.

The row delimiters determine what happens at the end of a row of data. In Microsoft Windows, CR, LF is generally used. To check this, you need to open the file being imported in Notepad++ (a free source code editor available online) or a similar programme.

## Importing data

To check and fix row delineation issues in Notepad++, open the file, select **View | Show Symbol | Show End of Line**.

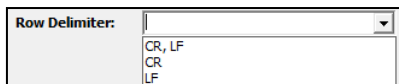


This displays the method of row delimitation used in the file. A file using CR, LF marks the end of a row of data with the following symbols:

**CR LF**

Files using either CR or LF only display the relevant symbol.

In the **Import Template** dialog in the One IYSS System Administration Client, select the appropriate option from the **Row Delimiter** drop-down.



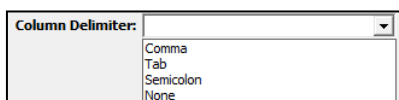
■ **Column Delimiter.** There are four options in this drop-down:

- Comma
- Tab
- Semicolon
- None.

The column delimiters separate text rows into columns, e.g. using commas:

1998,AQA,GCSE

To check and fix column delimitation issues, open the data file to visually identify how the columns are separated, and then select the appropriate option from the **Column Delimiter** drop-down.



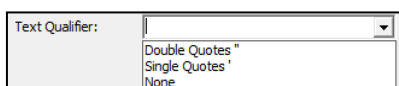
■ **Text Qualifier.** There are three options in this drop-down:

- Double Quotes “
- Single Quotes ‘
- None.

These can be used to encapsulate data items in the rows, e.g. using double quotes:

AQA,GCSE,"FakeForename",MK42 0AL

To check and fix text qualifier issues, open the data file to visually identify whether qualifiers have been used, and then select the appropriate option from the **Text Qualifier** drop-down.



## Configuring Starters and Leavers Data: Education - Lite

Education Starters and Leavers Import - Lite is a simplified version of the Starters and Leavers Import. The two imports work in the same way, but the Lite version is less complex and uses a different set of rules.

The starters and leavers import updates clients' situations, where appropriate, based on the source data file:

- If the source data start date is greater than the **Current Situation** start date, a new situation is created.
- If the source data start date is the same as the **Current Situation Start Date** and the **Current Situation** is 'unknown leaver', then the situation is overwritten.
- Young people who do not meet either of the previous two criteria are not updated.

An interaction is created for all persons on the import list. The interaction states whether the client record was updated or why it was not, e.g. 'Client record updated from provider data via automated import', 'Information has been received from [Provider Name] that confirms the client is [working/training] there but the recorded situation start date is different'. For more information on starter and leaver data, see [Configuring Starter and Leaver Data: Education and Training - Standard](#) on page 146

## Providers and Opportunities

For school and college imports to work correctly, opportunities for all Year Groups must be created against the correct providers. These opportunities should also have the correct situation group assigned, as any client situation updated or created will take their group from the associated opportunity.

To enable matching to the right provider, it is essential that all school and college records have a four digit DfE establishment (DCSF ID) number and training provider records have a UKPRN entered into the records.

To enter or check DCSF IDs and UKPRNs, open the required provider record in One IYSS. The number is displayed in the **Details** panel.

If you need to change or update this:

1. Click the **change** button to display the **Change Details** screen.
2. In the **IDs** panel, enter the number in the **DCSF ID** or **UKPRN** field as required.

3. Click the **continue** button to save the new number and return to the provider record.

## Leaver and Starter Import Templates (Configuring the Source File)

Before importing data into One IYSS, you must configure the leaver and starter templates. You can edit the templates to reflect the structure of the data that is being imported.



## Importing data

1. In the One IYSS System Administration Client, select **Imports | Import Template**.
2. In the **Value** column, double-click **Education Starters and Leavers** to display the **Import Template** dialog.

Import Template - SYSTEM RECORD

Details

Description: Education Starters and Leavers

Import Type: Edu Strtrs/Lvrs

Active  First Row has Headers

Row Delimiter: CR, LF

Column Delimiter: Comma

Text Qualifier: None

Values

Tolerance: 365

Interaction Type: Information Received

Category: General

Outcome: No Further Action

Target System: (empty)

XML Output Type: (empty)

OK Cancel

3. Ensure the source dataset matches the criteria selected in the **Details** section. An example data file formatted to the criteria above would look similar to the following:

Forename,Surname,DOB,Postcode,UPN,DfENo,StartDate,EndDate,GoalLevel,GoalDescription  
Fakeforename,Fakesurname,13/12/2000,,,1234,01/09/2012,01/05/2013,AS,Maths

**NOTE:** In this example, there is no postcode or UPN record. The columns are delimited by commas with no data or space between them.

4. From the **Interaction Type**, **Category** and **Outcome** drop-downs, select the information to be entered into client records where a situation cannot be updated.
5. Click the **OK** button to save the changes and close the dialog.

## Source File Contents - Education Starters and Leavers

In order for your source data to be accepted by the data import routine, the file must contain a column for each of the values in the Education Starters and Leavers template. The source file column names must be exactly the same as the names in the template, or the data import routine will generate an error.

To view the Education Starters and Leavers Lite values in the One IYSS System Administration Client, select **Imports | Import Template | Education Starters**. They are displayed in the **Value** column.

Value /	Sort Sequence
DfENo	6
DOB	3
Forename	1
GoalDescription	10
GoalLevel	9
Postcode	4
StartDate	7
Surname	2
UPN	5

The source file column headings must be in the following order:

Forename,Surname,DOB,Postcode,UPN,DfENo,StartDate,GoalLevel,GoalDescription

The following table demonstrates how the Source and Aspire Database column names match up when the data is mapped. Where translation is required, the data cannot be imported directly into the One IYSS database, it must first be translated and mapped to a One IYSS value. Instructions for translating data are provided in [Translating Values](#) on page 158.

Source Column Name	Max Column Size	Translation Required	Aspire Database Column Name
Forename	30 characters	No	Client matching purposes only
Surname	30 characters	No	Client matching purposes only
DOB	N/A	No	Client matching purposes only
Postcode	N/A	No	Client matching purposes only
UPN	N/A	No	Client matching purposes only
DfENo	4 Digits	No	Provider matching purposes and to update tbclientsituation.idProvider
StartDate	dd/mm/ccyy	No	tbclientsituation.dtStartDate
GoalLevel	N/A	Yes	tbclientsituation.idOutboundQualLevel
GoalDescription	N/A	No	tbclientsituation.vcSubject

## Running the Update

The update is run in the One IYSS web application.

To run the update:

1. In the **IYSS Links** panel on **my homepage**, click the **DX Monitoring** hyperlink to display the **DX Jobs** page.

2. Click the **submit** button to display the **Add DX Job** screen.

3. Select the **Education Starters** radio button.
4. Enter a **Description**.
5. If required, select the **No** radio button in the **Run Immediate** field.

## Importing data

- Click the **continue** button to display the next **Add DX Job** screen.

**Add DX Job** (continue)

Template: Education Starters  
Import Type: Education Starters  
Job Description: ESL Lite  
Run Immediate: Yes  
File:  Browse...

**Criteria**

Surname  Date of Birth  Post Code  UPN  
 Forename  All  First  Characters

(continue)

- Locate and select the file to import on your computer by clicking the **Browse...** button.
- Select the check boxes for all **Criteria** you want to use to match source file data to IYSS records.
- If you selected the **Forename** check box, indicate whether you wish to match data by the whole name (**All**) or by the **First [number of] Characters**.
- Click the **Continue** button to process the import. Completed jobs are displayed in the **DX Jobs** screen. To view the status report, click the notes icon next to the **Description**.

**DX Jobs** (continue)

To submit a new job click on the Submit button (submit)

Description	Template	Submitted	Started	Completed	Status	Delete
Import 2	Education Starters and Leavers				Complete	<input type="checkbox"/>

## Configuring Starter and Leaver Data: Education and Training - Standard

Two standard Starters and Leavers import facilities are provided to enable the update of both education and training starter and leaver situations. These imports also update clients' September Guarantee baselines statuses where appropriate. Both education and training data source files contain starter and leaver data, which is imported against client records, creating a new client situation or ending a current situation and creating an unknown situation. A variety of matching criteria is available when configuring the import.

The two templates are similar in the way they are run, but vary slightly in process and the source data required to meet the CCIS requirements.

## Providers and Opportunities

For school and college imports to work correctly, opportunities for all Year Groups must be created against the correct providers. These opportunities should also have the correct situation group assigned, as any client situation updated or created will take their group from the associated opportunity.

Training provider situations (WBL and Employment with Training) are linked to the provider only.

To enable matching to the right provider, it is essential that school and college records have a four digit DfE establishment (DCSF ID) number and training provider records have a UKPRN entered into the records.

To enter or check DCSF IDs and UKPRNs, open the required provider record in One IYSS. The number is displayed in the Details panel.

If you need to change or update this:

1. Click the **change** button to display the **Change Details** screen.
2. In the **IDs** panel, enter the number in the **DCSF ID** or **UKPRN** field as required.

3. Click the **continue** button to save the new number and return to the provider record.

## Leaver and Starter Import Templates (Configuring the source File)

Before importing data into One IYSS, you must configure the leaver and starter templates. You can edit the templates to reflect the structure of the data that is being imported. The process is the same for education starters and leavers and training starters and leavers.

1. In the One IYSS System Administration Client, select **Imports | Import Template**.
2. In the **Value** column, double-click **Education Starters and Leavers** or **Training Starters and Leavers** as appropriate to display the **Import Template** dialog.

3. Ensure the source dataset matches the criteria selected in the **Details** section. An example data file formatted to the criteria above would look similar to the following:

■ Education Starters and Leavers:

Forename,Surname,DOB,Postcode,UPN,DfENo,StartDate,EndDate,GoalLevel,GoalDescription

Fakeforename,Fakesurname,13/12/2000,,,1234,01/09/2012,01/05/2013,AS,Maths

**NOTE:** In this example, there is no postcode or UPN record. The columns are delimited by commas with no data or space between them.

## Importing data

### ■ Training Starters and Leavers:

Forename,Surname,DOB,Postcode,UPN,UKPRN,StartDate,EndDate,SituationGroup,SituationSubGroup,QualLevel,OccAreaGroup,OccAreaSubGroup

Fakeforename,Fakesurname,13/12/2000,,,789987,01/09/2012,02/05/2013,1,1,2,1,1

**NOTE:** In this example, there is no postcode or UPN record. The columns are delimited by commas with no space between them.

4. Enter a value (in number of days) in the **Tolerance** field.

**NOTE:** Client records updated to include new college situations are only processed by the update routine if they are 'within tolerance'. Clients are within tolerance if their current situation start date is before the update routine's start date minus the tolerance.

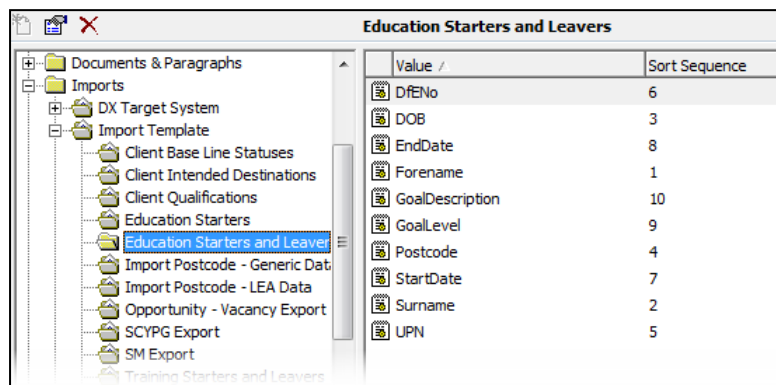
For clients out of tolerance, an interaction is created with notes of "Information has been received from <provider name> that confirms the client is studying there but the recorded situation start date is different." For more information see [Template Workflow](#) on page 150.

5. From the **Interaction Type**, **Category** and **Outcome** drop-downs, select the information to be entered into client records where the situations cannot be updated.
6. Click the **OK** button to save the changes and close the dialog.

## Source File Contents - Starters and Leavers: Education

In order for your source data to be accepted by the data import routine, the file must contain a column for each of the values in the Education Starters and Leavers template. The source file column names must be exactly the same as the names in the template, or the data import routine will generate an error.

To view the Education Starters and Leavers values in the One IYSS System Administration Client, select **Imports | Import Template | Education Starters and Leavers**. They are displayed in the **Values** column.



Value /	Sort Sequence
DfENo	6
DOB	3
EndDate	8
Forename	1
GoalDescription	10
GoalLevel	9
Postcode	4
StartDate	7
Surname	2
UPN	5

The source file column headings must be in the following order:

Forename,Surname,DOB,Postcode,UPN,DfENo,StartDate,EndDate,GoalLevel,GoalDescription

The following table demonstrates how the Source and Aspire database column names match up when the data is mapped. Where translation is required, the data cannot be imported directly

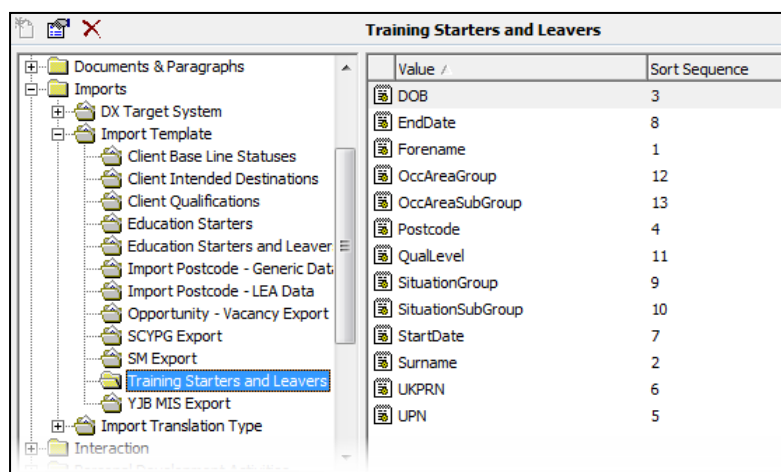
into the One IYSS database, it must first be translated and mapped to a One IYSS value. Instructions for translating data are provided in [Translating Values](#) on page 158.

Source Column Name	Max Column Size	Translation Required	Aspire Database Column Name
DfENo	4 Digits	No	Provider matching purposes and to update tbclientsituation.idProvider
DOB	N/A	No	Client matching purposes only
EndDate	dd/mm/ccyy	No	tbclientsituation.dtEndDate
Forename	30 characters	No	Client matching purposes only
GoalDescription	N/A	No	tbclientsituation.vcSubject
GoalLevel	N/A	Yes	tbclientsituation.idOutboundQualLevel
Postcode	N/A	No	Client matching purposes only
StartDate	dd/mm/ccyy	No	tbclientsituation.dtStartDate
Surname	30 characters	No	Client matching purposes only
UPN	N/A	No	Client matching purposes only

## Source File Contents - Starters and Leavers: Training

In order for your source data to be accepted by the data import routine, the file must contain a column for each of the values in the Training Starters and Leavers template. The source file column names must be exactly the same as the names in the template, or the data import routine will generate an error. The source data must conform to the sort sequence.

To view the Training Starters and Leavers values in the One IYSS System Administration Client, select **Imports | Import Template | Training Starters and Leavers**. They are displayed in the **Values** column.



The source file column headings must be in the following order:

Forename, Surname, DOB, Postcode, UPN, UKPRN, StartDate, EndDate, SituationGroup, SituationSubGroup,

The following table demonstrates how the Source and Aspire database column names match up when the data is mapped. Where translation is required, the data cannot be imported directly

## Importing data

into the One IYSS database, it must first be translated and mapped to a One IYSS value. Instructions for translating data are provided in [Translating Values](#) on page 158.

Source Column Name	Max Column Size	Translation Required	Aspire Database Column Name
Forename	30 characters	No	Client matching purposes only
Surname	30 characters	No	Client matching purposes only
DOB	N/A	No	Client matching purposes only
UPN	N/A	No	Client matching purposes only
Postcode	N/A	No	Client matching purposes only
UKPRN	8 Digits	No	Provider matching purposes and to update tbclientsituation.idProvider
StartDate	dd/mm/ccyy	No	tbclientsituation.dtStartDate
EndDate	dd/mm/ccyy	No	tbclientsituation.dtEndDate
SituationGroup	N/A	Yes	tbClientsituation.idSituationGroup
SituationSubGroup	N/A	Yes	tbClientsituation.idSituationSubGroup
OccAreaGroup	N/A	Yes	tbclientsituation.idOccAreaGroup
OccAreaSubGroup	N/A	Yes	tbclientsituation.idOccAreaGroup and tbclientsituation.idOccAreaSubGroup
QualLevel	N/A	Yes	tbclientsituation.idOutboundQualLevel

## Template Workflow

### Exceptions

An exception is output if:

- A client in the One IYSS database has no matching record on the import file, and vice-versa.
- A client in the One IYSS database has more than one matching record on the import file, and vice-versa.
- Imports for college starters and leavers, and school starters and leavers cannot be matched to provider records by DfE establishment numbers
- Imports for training provider starters and leavers, and school starters and leavers cannot be matched to provider records by DfE establishment numbers

If a client is matched, the output depends on whether the client's current situation provider as recorded in One IYSS is the same as the provider from the import, and whether the situation is within tolerance.

### Client matches where providers are same

If the current situation provider is the same in both One IYSS and the import file and within tolerance (see [Leaver and Starter Import Templates](#) on page 147), the client's situation is updated according to the following:

- **Situation Group** (employment and WBL situations): taken from source file **Status** column.
- **Situation Sub Group** (employment and WBL situations): taken from source file **Status** column.
- **Situation Sub Group** (educational situation): calculated from the client's date of birth.
- **Opportunity** (educational situation): calculated from the provider and the calculated year group.
- **Subject** (educational situation)
- **Occupational Area** (employment and WBL situations)
- **Outbound Qualification Level**
- **End Date**: If provided in the source file, a new follow on Unknown situation is added and the current situation is closed.

If the current situation provider is the same in both One IYSS and the import file, but not within tolerance, an "Information has been received from <provider name| that confirms the client is studying there but the recorded situation start date is different." exception is output.

### Client matches where providers are not same

If the current situation provider is different in One IYSS and the import file because the client's current situation group is unknown, but the start date is within tolerance ([Leaver and Starter Import Templates](#), page 147), the client's situation is updated according to the following:

- **Situation Group** (employment and WBL situations): taken from source file **Status** column.
- **Situation Sub Group** (employment and WBL situations): taken from source file **Status** column.
- **Situation Sub Group** (educational situation): calculated from the client's date of birth.
- **Opportunity** (educational situation): calculated from the provider and the calculated year group.
- **Subject** (educational situation)
- **Occupational Area** (employment and WBL situations)
- **Outbound Qualification Level**
- Update current baseline status to Offer Made where the Baseline Header Reporting Group = Guarantee Rep Yr 12 or Guarantee Rep Yr 11 and the current status <| Offer Made.

If the current situation provider is different in One IYSS and the import file because the client's current situation group is unknown, and the start date is not within tolerance ([Leaver and Starter Import Templates](#), page 147), a new current situation is created according to the following:

- **Situation Sub Group** (educational situation): calculated from the client's date of birth.
- **Opportunity** (educational situation): calculated from the provider and the calculated year group.
- **Occupational Area** (employment and WBL situations)
- **Outbound Qualification Level**



## Importing data

- Update current baseline status to Offer Made where the Baseline Header Reporting Group = Guarantee Rep Yr 12 or Guarantee Rep Yr 11 and the current status <| Offer Made.

If the current situation provider is different in One IYSS and the import file because the client's current situation group is one of the following, the situation is updated according to whether the situation start date is before or after the Update Routines situation start date:

- Moved out of Contact
- Employment without Training
- NEET
- No Response
- Other
- Statutory Education
- Voluntary
- Employment With Training but NOT Modern Apprenticeship.

If the situation start date is before the Update Routines situation start date, a new current situation is created from the data file according to the following:

- **Situation Group** (employment and WBL situations): taken from source file **Status** column.
- **Situation Sub Group** (employment and WBL situations): taken from source file **Status** column.
- **Situation Sub Group** (educational situation): calculated from the client's date of birth.
- **Opportunity** (educational situation): calculated from the provider and the calculated year group.
- **Subject** (educational situation)
- **Occupational Area** (employment and WBL situations)
- **Outbound Qualification Level**
- Update current baseline status to Offer Made where the Baseline Header Reporting Group = Guarantee Rep Yr 12 or Guarantee Rep Yr 11 and the current status <| Offer Made.


If the situation start date is after the Update Routines start date, an "Information has been received from <provider name| that confirms the client is studying there but the recorded situation start date is different." exception is output.

## Running the Update

The update is run in the One IYSS web application.

To run the update:

1. In the **IYSS Links** panel on **my homepage**, click the **DX Monitoring** hyperlink to display the **DX Jobs** page.



The screenshot shows the top of a web page. At the top left, there is a blue header bar with the text "DX Jobs" in white. To the right of this bar is a "continue" button. Below the header bar, there is a light gray navigation area containing the text "To submit a new job click on the Submit button" followed by a "submit" button with a right-pointing arrow.

- Click the **submit** button to display the **Add DX Jobs** screen.

- Select the **Training Starters and Leavers** or **Education Starters and Leavers** radio button.
- Enter a **Description**.
- If required, select the **No** radio button in the **Run Immediate** field.
- Click the **continue** button to display the next **Add DX Job** screen.

- Locate and select the file to import on your computer by clicking the **Browse...** button.
- Select the check boxes for all **Criteria** you want to use to match source file data to IYSS records.
- If you selected the **Forename** check box, indicate whether you wish to match data by the whole name (**All**) or by the **First [number of] Characters**.
- Click the **Continue** button to process the import. Completed jobs are displayed in the **DX Jobs** screen. To view the status report, click the notes icon next to the **Description**.

Description	Template	Submitted	Started	Completed	Status	Delete
timport1	Training Starters and Leavers				Complete	<input type="checkbox"/>

## Configuring Qualification Data

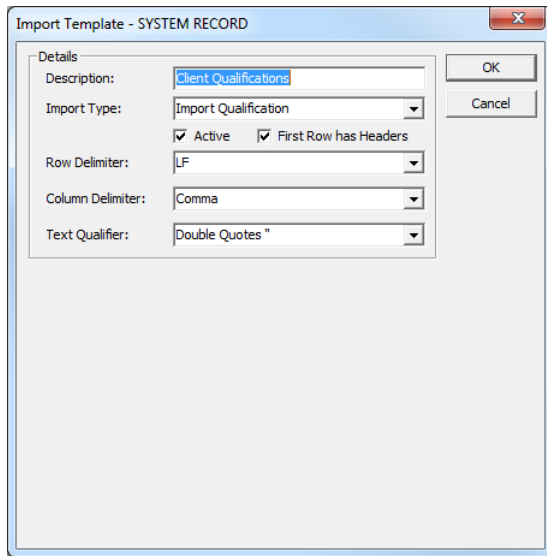
### Client Qualifications Template

Before importing client qualification data into One IYSS, you must configure the Client Qualifications template. You can edit the template to reflect the structure of the data that is being imported.

- In the One IYSS System Administration Client, select **Imports | Import Template**.

## Importing data

- In the **Value** column, double-click **Client Qualifications** to display the **Import Template** dialog.



- Ensure the source dataset matches the criteria selected in the **Details** section. An example data file formatted to the criteria above would look similar to the following:

Actual Grade,DOB,Exam Board,Exam Level,Forename,Postcode,Predicted Grade,Subject,Surname,UPN,Year Attained

GB,28/04/1998,AQA,GCSE,FakeForename,MK42 0AL,GB,English Language,FakeSurname,H820200100001,2014

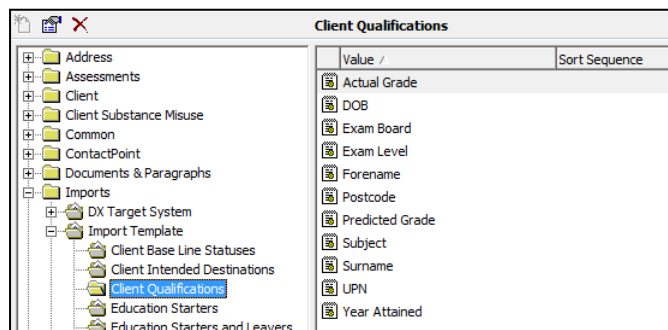
GB,28/04/1998,AQA,GCSE,FakeForename,MK42 0AL,GC,English Literature,FakeSurname,H820200100001,2014

GC,28/04/1998,AQA,GCSE,FakeForename,MK42 0AL,GA,Mathematics,FakeSurname,H820200100001,2014

## Source File Contents

In order for your source data to be accepted by the data import routine, the file must contain a column for each of the values in the Client Qualifications template. The source file column names must be exactly the same as the names in the template, or the data import routine will generate an error.

To view the Client Qualification values in the One IYSS System Administration Client, select **Imports | Import Template | Client Qualifications**. They are displayed in the **Values** column.



The following table demonstrates how the Source and Aspire database column names match up when the data is mapped. Where translation is required, the data cannot be imported directly

into the One IYSS database, it must first be translated and mapped to a One IYSS value. Instructions for translating data are provided in [Translating Values](#) on page 158.

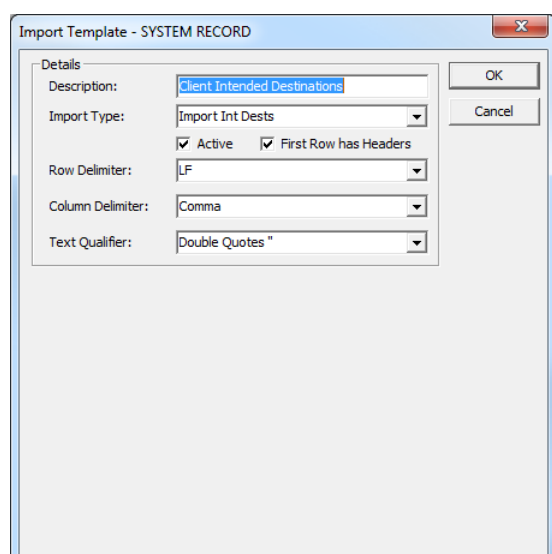
Source Column Name	Max Column Size	Translation Required	Aspire Database Column Name
Actual Grade	N/A	Yes	Tbclientqualification.idactualgrade
DOB	N/A	N/A	Client matching purposes only
Exam Board	30 characters	No	tbclientqualification.vcExaminationBoard
Exam Level	N/A	Yes	tbclientqualification.idlevel
Forename	N/A	N/A	Client matching purposes only
Postcode	N/A	N/A	Client matching purposes only
Predicted Grade	N/A	Yes	tbclientqualification.idforecastgrade
Subject	30 characters	No	tbclientqualification.vcSubject
Surname	N/A	N/A	Client matching purposes only
UPN	N/A	N/A	Client matching purposes only
Year Attained	4 character year	No	tbclientqualification.dtdateattained

## Configuring Intended Destinations

### Configuring the Client Intended Destinations template

Before importing intended destinations data into IYSS, you must configure the intended destinations template. You can edit the template to reflect the structure of the data that is being imported.

1. In the One IYSS System Administration Client, select **Imports | Import Template**.
2. In the **Value** column, double-click **Client Intended Destinations** to display the **Import Template** dialog.



## Importing data

- Ensure the source dataset matches the criteria selected in the **Details** section. An example data file formatted to the criteria above would look similar to the following:

Intended Destination Year 11,Intended School/College,Intended Course,Intended Levels,Intended Sector,DOB,Forename, Postcode,Surname,UPN

Job Def,Ballinger,None,Adv,Building,12/05/1999,Maisie,MK44 2AW,Hawthorne,

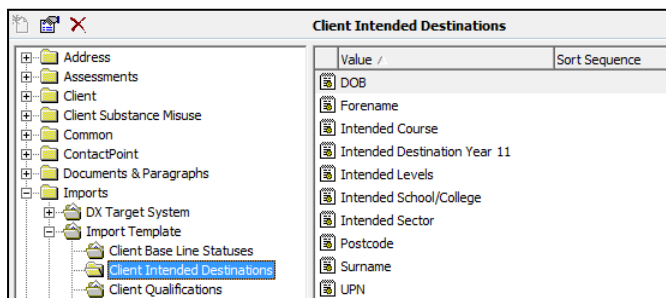
FE,Dorothy Stringer Academy,Physics and Maths,AS,,09/03/1998,Rebecca,MK42 6BZ,Horton,Y820204198146

Job Def,Leeds Utd,,,,,08/03/1999,Eduardo,MK44 1JA,Benito,

## Source File Contents

In order for your source data to be accepted by the data import routine, the file must contain a column for each of the values in the Importing Intended Destinations template. The source file column names must be exactly the same as the names in the template, or the data import routine will generate an error.

To view the Importing Intended Destinations values in the One IYSS System Administration Client, select **Imports | Import Template | Importing Intended Destinations**. They are displayed in the **Values** column.



The following table demonstrates how the Source and Aspire database column names match up when the data is mapped. Where translation is required, the data cannot be imported directly into the One IYSS database, it must first be translated and mapped to a One IYSS value. Instructions for translating data are provided in [Translating Values](#) on page 158.

Source Column Name	Max Column Size	Translation Required	Aspire Database Column Name
DOB	N/A	N/A	Client matching purposes only
Forename	N/A	N/A	Client matching purposes only
Intended Destination Year 11	30 characters	Yes	tbClient.idAspirationPriority
Intended Levels	30 characters	Yes	tbClient. idIntendedDestPre16Level
Intended School/College	30 characters	No	tbClienttxIntendedDestNotes
Intended Sector	30 characters	Yes	tbClient. idIntendedDestPre16OccArea
Postcode	N/A	N/A	Client matching purposes only

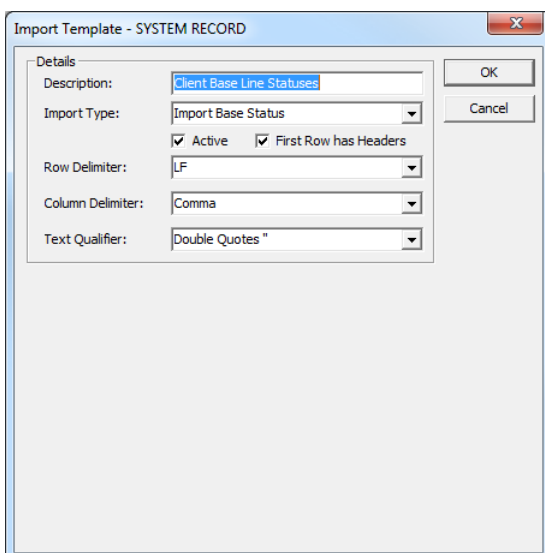
Source Column Name	Max Column Size	Translation Required	Aspire Database Column Name
Surname	N/A	N/A	Client matching purposes only
UPN	N/A	N/A	Client matching purposes only

## Configuring Client Base Line Statuses (September Guarantee)

### Configuring the Client Base Line Statuses template

Before importing client qualification data into IYSS, you must configure the client base line status template. You can edit the template to reflect the structure of the data that is being imported.

1. In the One IYSS System Administration Client, select **Imports | Import Template**.
2. In the **Value** column, double-click **Client Base Line Status** to display the **Import Template** dialog.



3. Ensure the source dataset matches the criteria selected in the **Details** section. An example data file formatted to the criteria above would look similar to the following:

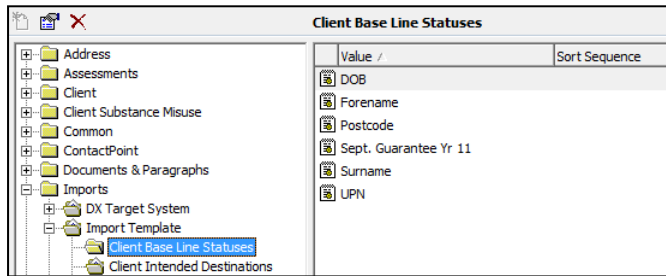
```
Sept. Guarantee Yr 11,DOB,Forename,Postcode,Surname,UPN
No Contact,20/12/1999,Karina ,,Bashir,A820200102006
No Contact,26/01/2000,Edwin,,Bauer,P820200102007
Offer Met,17/06/2000,Betty,,Cracknell,R820200102020
Reengage,23/03/2000,Khan,,Doo,X820200102114
```

### Source File Contents

In order for your source data to be accepted by the data import routine, the file must contain a column for each of the values in the Client Base Line Statuses template. The source file column names must be exactly the same as the names in the template, or the data import routine will generate an error.

## Importing data

To view the Client Base Line Status values in the One IYSS System Administration Client, select **Imports | Import Template | Client Base Line Statuses**. They are displayed in the **Values** column.



The following table demonstrates how the Source and Aspire Database column names match up when the data is mapped. Where translation is required, the data cannot be imported directly into the One IYSS database, it must first be translated and mapped to a One IYSS value. Instructions for translating data are provided in [Translating Values](#) on page 158.

Source Column Name	Max Column Size	Translation Required	Aspire Database Column Name
DOB	N/A	N/A	Client matching purposes only
Forename	N/A	N/A	Client matching purposes only
Postcode	N/A	N/A	Client matching purposes only
Sept. Guarantee Yr 11	30 characters	Yes	tbClientBaseLine. idBaseLineStatus
Surname	N/A	N/A	Client matching purposes only
UPN	N/A	N/A	Client matching purposes only

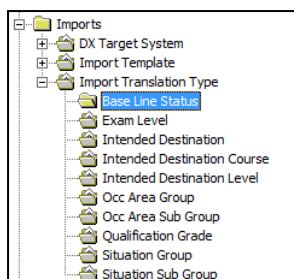
## Translating Values for Import

When importing data, certain values must first be mapped to a one IYSS value before they can be imported into the database. These values are indicated in the source file contents tables in the respective sections.

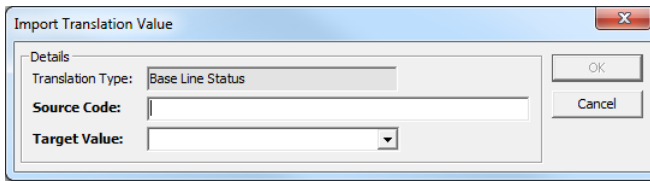
## Translating New Values

To translate a new value:

1. In the One IYSS System Administration Client, select **Imports | Import Translation Type | <Value to Translate>**.



- Click the **Add Value** icon to display the **Import Translation Value** dialog.



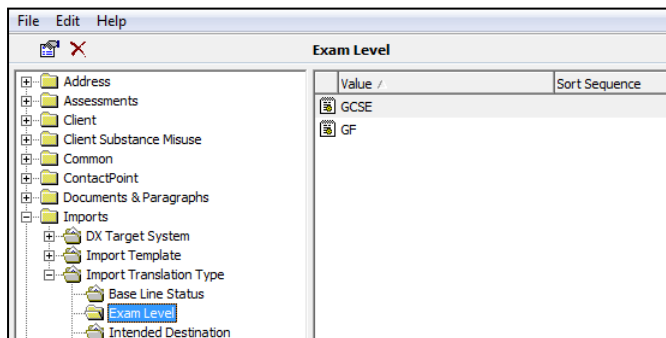
- In the **Source Code** field, enter the value placed in the source data file.
- From the **Target Value** drop-down, select the appropriate One IYSS value.
- Click the **OK** button to save the changes and close the dialog.
- Repeat the steps for all other values needing translation.**

**NOTE:** You must analyse your incoming source file and ensure that all values in the columns where a translation is required have been mapped to an IYSS value.

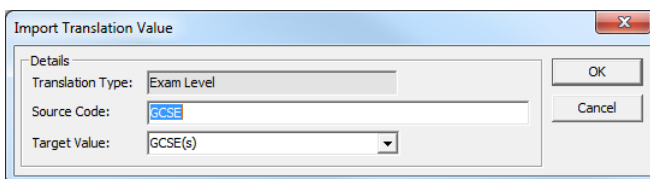
## Editing translation codes

To edit a translation code:

- In the One IYSS System Administration Client, select **Imports | Import Translation Type | <Type to Edit>**.



- In the **Value** column, double click the required value to display the **Import Translation Value** dialog.



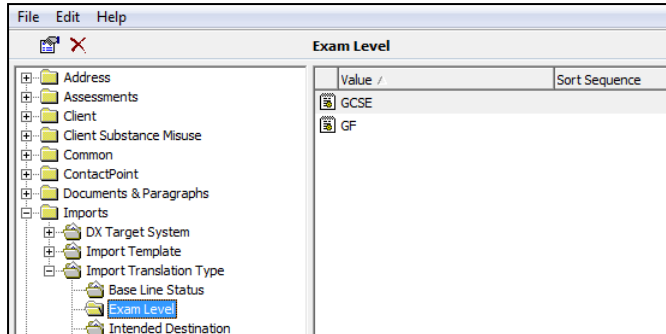
- As required, edit the **Source Code** and **Target Value** fields.
- Click the **OK** button to save the changes and close the dialog.



## Deleting a translation code

To delete a translation code:

1. In the One IYSS System Administration Client, select **Imports | Import Translation Type | <Type to Edit|**.



2. In the **Value** list, select the required value.
3. Click the **Delete Value** icon to display a confirmation dialog.
4. Click the **Yes** button to save the changes and close the dialog.

## Importing Data

The data sets are imported the same way. The minor differences that exist between them are documented where appropriate.

Before importing the data, ensure the relevant templates and files have been configured, and any values needing translation have been mapped.

To import data:

1. Log into the One IYSS web application.
2. In the **IYSS Links** list, click the **DX Monitoring** hyperlink to display the **DX Jobs** screen.
3. Click the **submit** button to display the **Add DX Job** screen.

**Add DX Job** (continue)

Template:

Client Base Line Statuses     
  Client Intended Destinations     
  Client Qualifications  
 Education Starters and Leavers     
  Import Postcode - Generic Data     
  Import Postcode - LEA Data  
 Opportunity - Vacancy Export     
  SCYPG Export     
  Training Starters and Leavers  
 YJB MIS Export

Description:

Run Immediate:

Yes - the job will run next time the DX scheduled job runs (this is setup by each individual company ask your administrator for the schedule).  
 No - the job will run next time the DX scheduled job runs after DX Start Time which is currently set at 12:00

(continue)

4. Select the appropriate **Template**.
5. Enter a **Description** to identify the import in the **DX Monitoring** area.
6. Indicate when you want to run the import by selecting the appropriate **Run Immediate** radio button.

- Click the **continue** button to display the next screen.

**NOTE:** The available fields in this screen will vary slightly depending on the template being imported.

- Click the **Browse** button to display a file browser dialog.
- Locate the required data file on your computer.
- Double-click the file to select it for import and return to the **Add DX Job** screen.
- In the **Criteria** panel, select the check boxes of all the fields to be used in matching source data to One IYSS data.

If using **Forename** to match data, you can specify whether the whole forename is to be used by selecting the **All** radio button, or select the **First N Characters** radio button and enter the number of characters (N) in the text field to determine the number of forename letters to use when matching data. Refer to the following points for data-specific instructions concerning the unique fields:

- **Qualification Data:** The day and month of the exam should be entered in the **Input Day** and **Input Month** fields. These are used with the **Year Attained** from the source file to create the date of the exam (tbclientqualification.dtdateattained). Only the month and year are displayed in One IYSS.
- **Intended Destination Data:** If the **Intended Destination** is Labour Market or Training, the **Occupational Area Group** and **Level** must be selected from the drop-downs. These are used as default values for gaps in the corresponding columns in the source file.

**IMPORTANT NOTE:** If a current client base line status exists and is positive, i.e. it has an XML code of 110, 114, 115 or 124, then the import does not update.

## Viewing the Import

To view the import reports:

- Log into the One IYSS web application.
- In the **IYSS Links** panel in **my homepage**, click the **DX Monitoring** hyperlink to display the **DX Jobs** screen.
- In the left-hand column, click the yellow document icon to display the **DX Job** dialog.

**Importing data**

- 4. To display the **updates** or **exceptions**, click the relevant hyperlinks to open a new internet browser tab containing a .pdf report listing the exceptions or updates made when the data was imported.

<b>Report Criteria:</b>				
DX Job : Max test 11				
Submitted By : IYSS Administrator				
IYSS		ONEIYSS		
DX - Exception Report			Printed On	16:29:51
Name	Date of Birth	PostCode	UPN	Details
				Multiple matches were found for this record

# 24 | Troubleshooting

## Unable to Send and/or Receive Emails in MX

Complete the following steps. If the problem is not rectified when the next AspireMX job is run, contact One Application Support.

1. Check the event log on the machine that runs the AspireMX scheduled job and ensure the job is running successfully.
2. Ensure that the MX email credentials (POP3, SMTP) and address are still valid and that passwords are up to date.
3. Ensure that the MX user account credentials are still valid and that passwords are up to date.

## Unable to Send and/or Receive SMS Messages in MX

Complete the following steps. If the problem is not rectified when the next AspireMX job is run, contact One Application Support.

1. Check the event log on the machine that runs the AspireMX scheduled job and ensure the job is running successfully.
2. Ensure that the MX user account credentials are still valid and that passwords are up to date.
3. Ensure that your *TextAnywhere* account has credit.
4. Check firewall and proxy server logs to ensure that traffic to the TextAnywhere service provider is not being blocked.

## Client Records Remain Locked

This is often an indication that the scheduled TidyNet job is not running as it should be. Run the following diagnostics:

1. Check the schedule task for the TidyNet job to ensure it is enabled and running.
2. If it is not running, report the issue to One Application Support.
3. If the TidyNet job is running, check the event log for errors.
4. If there are any errors in the event log, report them to One Application Support.
5. If there are no errors in the event log, check the content of TBASPIRENETSESSION. If there are any rows where DTLASTUPDATED is older than today, TidyNet has a fault and One Application Support should be contacted.

## Unable to Unlock Clients Using the One IYSS System Administration Client

This is often an indication that there is an issue with TidyNet. Run the following TidyNet diagnostics:

1. Check the scheduled task for the TidyNet job to ensure it is enabled and running.
2. If it is not running, report the issue to One Application Support.
3. If the TidyNet job is running, check the event log for errors.
4. If there are any errors in the event log, report them to One Application Support.

5. If there are no errors in the event log, check the content of TBASPIRENETSESSION. If there are any rows where DTLASTUPDATED is older than today, TidyNet has a fault and One Application Support should be contacted.
6. If there are no issues with TidyNet, open and save the client record in One v4. If One v4 reports an error while saving, this issues lies within One v4 and can be resolved from there. If the issue still persists, report the problem to One Application Support.

## Clients' Ages are Incorrect

Clients' ages are calculated during the Clean Up job overnight. Failure to update ages indicates that Clean Up is not running. Run the following diagnostics:

1. Check that Clean Up is enabled and scheduled.
2. If Clean Up is not enabled and scheduled to run, amend the settings.
3. If Clean Up is running, check the event log on the server that runs it.
4. Report any application event logs to One Application Support.

## Rollup Process did not Complete

If the rollup process was interrupted and did not complete, it can be restarted using the same parameters and will continue from where it was interrupted the previous time.

## Unable to See One Reveals in a Client Record

Information displayed in an IYSS client record from other contributors to the One record is controlled by licensing and user security privileges accorded to their One account, not their One IYSS account. If Reveals are not displayed for certain users, you should check that:

- The LA has a licence for the module containing the Reveal information.
- The user's One account has the necessary security permissions required to access the information.

## Security Groups not Working

While most information and functions in One IYSS are specific to the module, where core client information is involved, or in any other case where information is being sourced from One, it is the users' One security privileges that control their permissions. Before contacting One Application Support, first check that One security groups and One IYSS security groups have the same permissions assigned.

## Record will not Save or Crashes on Saving

This can be caused by data issues within the One record. Complete the following steps to resolve the issues in One:

1. Open the record in One v4.
2. Save the record in One v4.
3. Follow instructions given by any error messages that are displayed.

It should now be possible to amend the record in One IYSS.

## Restoring a Deleted Client Record

Deleting a client record through the Set Client to Inactive function, even if the `tbclient.btIsDeleted` field is set to true, archives the record. While the record is, to all intents and purposes, deleted, it may be resurrected from the archive. To restore an archived record:

1. In the One IYSS web application client search function, enter the search criteria for deleted client
2. Ensure the **IYSS Inactive Record** field is selected.
3. Click the **Search** button.
4. Select the required record.
5. In the **Actions** panel, click the **Set Client Active** hyperlink to display a confirmation dialog.
6. Click the **OK** button to activate the record.

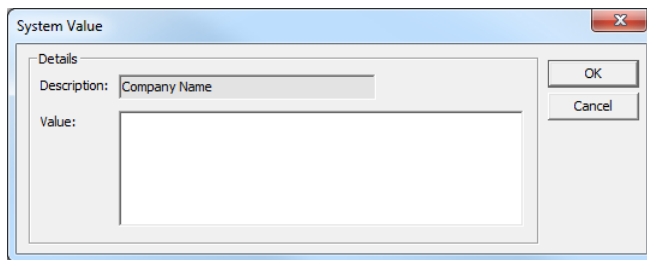
## Unable to Delete an Interaction

Interactions that generate data within other sections of the client record cannot be deleted. Deleting an interaction would remove the source of the generated data. The system is designed to prevent this.

# 25 | Appendix 1: System Values

**WARNING:** Misconfiguration of system values can result in system failure. If you are unsure how any changes you make to the system values will affect the system stability, please contact One Application Support prior to making the changes.

The central values within One IYSS are for the most part defined by the system values. To adjust these in the One IYSS System Administration Client, select **System | System Value** to display the system values, and double-click the required value to display the **System Value** dialog.



For guidance on editing these values, consult the table below.

**NOTE:** Certain fields are True/False fields, where 1=True and 0=False. Any field with two options, 1 or 0, is a True/False field.

Field	Instruction
<b>Adult View - Use In Transition Clients</b>	Leave as 0.
<b>Agency View - Recipient Email Address</b>	Leave blank. This function is no longer used.
<b>Application Name</b>	This should be an appropriate name for the application, e.g. One IYSS.
<b>Clean Up - Update Clients Team to Lead Worker Team</b>	To assign clients' managing teams as their lead workers, set to 1, otherwise set to 0.
<b>Client SM Period After Discharge Date</b>	Enter a numerical value to create substance abuse TOP reminders in <b>my homepage</b> for a set number of weeks after clients have been discharged.
<b>Client SM Period Between TOPs</b>	Enter a numerical value to create substance abuse TOP reminders in <b>my homepage</b> for a set number of weeks between TOPs.
<b>CM - Client Points - Intensive</b>	Enter a numerical value to define the default points value for clients with intensive need levels. If you change this field, make sure you also change the 'CM - System Value Client Points Have Been Updated' value to 1.
<b>CM - Client Points - Minimum</b>	Enter a numerical value to define the default points value for clients with minimum need levels. If you change this field, make sure you also change the 'CM - System Value Client Points Have Been Updated' value to 1.
<b>CM - Client Points - Not Determined</b>	Enter a numerical value to define the default points value for clients with undetermined need levels. If you change this field, make sure you also change the 'CM - System Value Client Points Have Been Updated' value to 1.

Field	Instruction
<b>CM - Client Points - Supported</b>	Enter a numerical value to define the default points value for clients with supported need levels. If you change this field, make sure you also change the 'CM - System Value Client Points Have Been Updated' value to 1.
<b>CM - Standard Caseload Points</b>	Enter a numerical value to define the default points value for clients with a standard needs level. If you change this field, make sure you also change the 'CM - System Value Client Points Have Been Updated' value to 1.
<b>CM - System Value Client Points Have Been Updated</b>	If you have updated the caseload points in the CM fields, change this value to 1 to recalculate the caseloads during the next Clean Up Job, following which it will reset to 0.
<b>CM - Utilisation Over 1</b>	Enter a number to act as a percentage against which client <u>over</u> -utilisation is monitored. Clients with scores falling between 100 and this number, e.g. 110, will display a certain graphic indicating a client is over utilised.
<b>CM - Utilisation Over 2</b>	Enter a number to act as a percentage against which client <u>over</u> -utilisation is monitored. Clients with scores falling between 'CM - Utilisation Over 1' and this number, e.g. 130, will display a certain graphic indicating a client is highly over utilised
<b>CM - Utilisation Under 1</b>	Enter a number to act as a percentage against which client <u>under</u> -utilisation is monitored. Clients with scores falling between 100 and this number, e.g. 90, will display a certain graphic indicating a client is under-utilised.
<b>CM - Utilisation Under 2</b>	Enter a number to act as a percentage against which client <u>under</u> -utilisation is monitored. Clients with scores falling between 'CM - Utilisation Under 1' and this number, e.g. 70, are flagged as highly under-utilised.
<b>Command Execution Retries</b>	Leave as 'not in use'.
<b>Command Execution Timeout</b>	Leave as 'not in use'.
<b>Company Email Address</b>	Leave as 'not in use'.
<b>Company Name</b>	This is used to validate your licence code. It should only be changed after consulting with One Application Support.
<b>Company Web Address</b>	Leave as 'not in use'.
<b>Consent Expiry   Review Approaching Days</b>	Enter a number in this field to determine how many days' notice users get before their clients' Data Protection consent expires. Beginning at this number of days prior to consent expiration, affected clients are displayed in the <b>my homepage Reminders</b> list until consent expires or is updated.
<b>Consent Expiry   Review Default Days</b>	Enter a number to create a default data protection consent period, in days. The system calculates the consent expiry date based on this many days after consent was given.
<b>ContactPoint - Load</b>	Leave as 'not in use'.
<b>ContactPoint - Load - Dummy Run</b>	Leave as 'not in use'.
<b>ContactPoint - Query</b>	To grant user access to ContactPoint query facilities, set to 1, otherwise set to 0.



## Appendix 1: System Values

Field	Instruction
ContactPoint DSI Domain	Enter the DSI Domain assigned to ContactPoint.
ContactPoint DSI Subdomain	Enter the DSI Subdomain assigned to ContactPoint.
Country	Leave as 'not in use'.
Database ID	Enter the database ID issued by DCFS. This is used when processing the NCCIS XML file.
Database Partnership GUID	Leave as 'not in use'.
DB Minimum S/W Release	Do not change this value. It is used by the system to verify database compatibility with One IYSS.
DB Release	Do not change this value. It is used by the system to verify database compatibility with One IYSS.
Default View Type	Leave as IYSS.
Dialog360 URL	This identifies the website containing the eLearning materials available to the user. The default is <a href="http://my.dialog360.com">http://my.dialog360.com</a> .
Display previous x assessments	Enter the number of previous assessments to be displayed in the <b>Assessments</b> panel. Any assessments not displayed can be accessed by clicking the <b>more</b> button in the panel header.
DX Start time	Enter the default time (hh:mm) for AspireDX jobs to run when not governed by a 'Run Immediately' command.
DX/TidyNet - IYSS Network UserID	Enter the Capita One ID for the account used to process DX/TidyNet requests.
DX/TidyNet - IYSS Network User ID Password	Enter the encrypted Capita One password for the account used to process DX/TidyNet requests. Contact One Application Support for assistance with encryption.
Filter Lookups By User LEA	To filter <b>Team</b> and <b>Centre Lookup</b> fields by LEA, set this to 1, otherwise set to 0. It is recommended that you seek advice from One Application Support before implementing this filter.
Guarantee Display Critical Days	Leave as 'not in use'.
Guarantee Display in Days Days	Leave as 'not in use'.
Guarantee Display Info Days	Leave as 'not in use'.
Guarantee Display Warning Days	Leave as 'not in use'.
Guarantee Weeks	Leave as 'not in use'.
Is Connexions	Do not change. For Capita use only.
Is DB Connection Kept Open	Do not change. For Capita use only.
Is System Available	To enable users to access the One IYSS, set to 1. To prevent access, e.g. during system upgrade, set to 0.
IYSS.net Additional Header Information	If required, enter text here to create a header bar displayed following login to the system. You may want to use this to differentiate between live and test systems, for example.
IYSS.net Base URL	Enter the web address used to access One IYSS. Ensure that SSL certified addresses use the <a href="https://">https://</a> prefix, not <a href="http://">http://</a> .

Field	Instruction
<b>IYSS.net Initial Number of Interactions Shown</b>	Enter the default number of interactions displayed when a client record is accessed. Any interactions not displayed can be accessed by clicking the <b>more</b> button in the panel header.
<b>IYSS.net Interaction Timeout Minutes</b>	Enter a number to determine, in minutes, how long sessions can remain inactive before being automatically closed. If no data is passed between the pc and the server during this time span, the user will be logged out.
<b>IYSS.net Interaction Timeout Warning Minutes</b>	Enter a number to determine, in minutes, how much notice users get before session timeout due to inactivity.
<b>IYSS.net Login Contact Details</b>	Identify who users should contact in case of login issues, and how to reach them, e.g. "your system administrator on 01234 123456".
<b>IYSS.net Login Message</b>	Enter a welcome message here to be displayed as a header on the login dialog.
<b>IYSS.net Use Role Based Security</b>	To deploy role based security, set this value to 1, otherwise set to 0. Please consult with One Application Support if you feel role based security is necessary.
<b>Key Client Update Sender Address</b>	Enter the email address used to notify advisers of Key Client updates. It must be able to send and receive emails.
<b>Lead LEA 1</b>	Do not change. For Capita use only.
<b>Lead LEA 2</b>	Do not change. For Capita use only.
<b>Licence Code</b>	Enter the licence code you have obtained for the system. This should only be changed after consulting with One Application Support.
<b>Location - DX</b>	Enter the location to which exported files are saved. The location must be accessible to all One IYSS users who import or export files. This is used to validate the licence code, and should not be changed without consulting One Application Support.
<b>Login Message - Change</b>	Enter the message displayed to users when they are prompted to change their login credentials.
<b>Login Message - Initial</b>	No longer used.
<b>Long Running Task Interval Seconds</b>	
<b>Max Rows per Page - IYSS.net</b>	Enter the number of rows to be displayed on each page of search results.
<b>Max Rows per Page - IYSS.net condensed view</b>	Enter the number of rows to be displayed on each page of search results in the condensed view.
<b>Max Rows per Page - My Homepage</b>	Enter the number of rows to be displayed on <b>my homepage</b> .
<b>Max Rows to Return - IYSS</b>	Leave as 'not in use'.
<b>MIAP - Password</b>	Leave as 'not in use'.
<b>MIAP - UKPRN</b>	Leave as 'not in use'.
<b>MIAP - Username</b>	Leave as 'not in use'.

## Appendix 1: System Values

Field	Instruction
<b>MIAP Organisational Ref</b>	Leave as 'not in use'.
<b>Multiplier - Hours Per Day</b>	Enter a number to determine calculations of opportunity pay when levelling hourly, daily or weekly pay.
<b>MX - Administrator Email Address</b>	Enter the email address of a One administrator. This should be a mailbox accessible by all One IYSS administrators.
<b>MX - Deliver Messages</b>	To enable AspireMX's delivery functions, set to 1, otherwise set to 0.
<b>MX - Earliest Time to Send Text Message</b>	Enter a time (hh:mm) before which the system will not send text messages to clients.
<b>MX - IYSS Network User ID</b>	Enter the Capita One ID for the account used to process AspireMX requests.
<b>MX - IYSS User ID Password</b>	Enter the encrypted Capita One password for the account used to process AspireMX requests.
<b>MX - Latest Time to Send Text Message</b>	Enter a time (hh:mm) beyond which the system will not send text messages to clients.
<b>MX - Number of Days to Keep Job History</b>	Enter the number of days that message history is to be kept. Message history informs senders when clients have responded to messages they have sent.
<b>MX - POP3 Password</b>	Enter the password of the POP3 account used to receive emails from clients.
<b>MX - POP3 Port</b>	Enter the port number of the POP3 account used to receive emails. This defaults to 110.
<b>MX - POP3 Server</b>	Enter the name or IP address of the POP3 server.
<b>MX - Tracking Number Prefix</b>	Do not change. For Capita use only.
<b>NCCIS Default Address</b>	This is an address entered into the monthly XML file for clients with no fixed or known address. NCCIS guidelines recommend that this is the address of your main office. Each line of the address should be separated by a semi colon. You can enter up to six lines.
<b>Neighbourhood Description</b>	Enter a description to be used as the legend for the neighbourhood.
<b>No. of days before Currency date to display alert</b>	Enter a number in this field to determine how many days' notice users get before their clients' currency is due for review. Beginning at this number of days prior to the currency review, affected clients are indicated by a warning icon in client search screens until their currency is updated.
<b>No. of times to revive Docs or Notes session</b>	The number entered here is multiplied by the IYSS <b>Interaction Timeout Minutes</b> field to extend the effective timeout value while users are working on documents and notes.
<b>Number of Previously Accessed Clients</b>	Enter a number here to determine how many previously viewed clients are displayed in the <b>Last N Clients Viewed</b> section of <b>my homepage</b> .

Field	Instruction
<b>Number of Previously Accessed Providers</b>	Enter a number here to determine how many previously viewed providers are displayed in the <b>Last N Providers Viewed</b> section of <b>my homepage</b> .
<b>Number of YS Sessions to become a Participant</b>	Enter a number here to determine the number of sessions in one year clients need to attend to be automatically marked as participants. The automatic markup is performed by an overnight job.
<b>ONE IYSS - Map Link</b>	Enter the valid URL of a map provider. The following values have been tested and can be used if desired: <a href="http://maps.google.co.uk/m?q=\$POSTCODE\$">http://maps.google.co.uk/m?q=\$POSTCODE\$</a> <a href="http://www.bing.com/maps/?where1=\$POSTCODE\$">http://www.bing.com/maps/?where1=\$POSTCODE\$</a>
<b>Opp Search - Common Opportunity Info</b>	This enables personalisation of the Vacancy module.
<b>Opp Search - Explanation Notes</b>	Enter any instructions or information relating to the Opportunity search section of the Vacancy module to be displayed to users/clients.
<b>Opportunity Follow-up Days</b>	Enter the number of days between an opportunity's Created On date and the default Follow-up On Date.
<b>PD Provider Follow-up Days</b>	Enter the number of days between a provider's Created On date and the default Follow-up On Date.
<b>PostcodeAnyWhere AccountCode</b>	Leave as 'not in use'.
<b>PostcodeAnyWhere Licence Key</b>	Leave as 'not in use'.
<b>PostcodeAnyWhere Use Per-User Licensing</b>	Leave as 'not in use'.
<b>Qualification Points for A Level</b>	Enter a number here to calculate the points gained from individual qualifications to determine if clients have achieved an overall academic level of A Level or equivalent.
<b>Qualification Points for Higher Education</b>	Enter a number here to calculate the points gained from individual qualifications to determine if clients have achieved an overall academic level equivalent to higher education.
<b>Qualification Points for NVQ Level 2</b>	Enter a number here to calculate the points gained from individual qualifications to determine if clients have achieved an overall academic level of NVQ Level 2 or equivalent.
<b>Recordset CacheSize</b>	Do not change. For Capita use only.
<b>Re-run month end MI Routine</b>	Set as 0 for normal month end statistics processing, set as 1 to re-run the month end routine.
<b>Security - Failed Login Attempts to Lock Out</b>	Enter the number of unsuccessful login attempts permitted before users are locked out.
<b>Security - Force Change Password Days</b>	Enter the number of days for which a password may be used before the system demands it to be changed.
<b>Security - Memorable Data Description</b>	Enter the text to be displayed in the legend of the memorable character selection field at login.
<b>Security - Memorable Data Minimum Length</b>	Enter the minimum permissible number of characters in users' memorable data. This field should not be changed without One Application Support consultation.

## Appendix 1: System Values

Field	Instruction
<b>Security - Password Format Alpha/Numeric/CAPS</b>	To require passwords to include alpha, numeric and uppercase characters, set to 1, otherwise set to 0.
<b>Security - Password Minimum Length</b>	Enter the minimum permissible number of characters in user passwords. This field should not be changed without One Application Support consultation.
<b>Security - Stop Re-Use of Passwords</b>	Enter the number of password changes required before a password may be reused.
<b>Session afternoon starts</b>	Enter a time here (hh:mm) to mark the cut-off point beyond which all new sessions are considered afternoon sessions.
<b>Session all day threshold</b>	Enter a number to determine how long, in hours, a session must be to class as an all-day session.
<b>Session Description - Overall Reason for Grade</b>	Enter own text description for display of text box on session. Blank = not in use and will not be displayed.
<b>Session Description - Personal Outcomes</b>	Enter own text description for display of text box on session. Blank = not in use and will not be displayed.
<b>Session Description - Topic Outcomes</b>	Enter own text description for display of text box on session. Blank = not in use and will not be displayed.
<b>Session Description - Unexpected Outcomes</b>	Enter own text description for display of text box on session. Blank = not in use and will not be displayed.
<b>Session Description - YP Reason for Grade</b>	Enter own text description for display of text box on session. Blank = not in use and will not be displayed.
<b>Session evening starts</b>	Enter a time here (hh:mm) to mark the cut-off point beyond which all new sessions are considered evening sessions.
<b>Style - Default Activity</b>	No longer used.
<b>Style - Future Interaction</b>	No longer used.
<b>Style - Historic Interaction</b>	No longer used.
<b>Style - Interaction Notes</b>	No longer used.
<b>Style - Interaction Outcome</b>	No longer used.
<b>Style - Overdue Interaction</b>	No longer used.
<b>Substance Misuse Agency Code</b>	Enter the code used in the NDTMS data extract.
<b>Substance Misuse Core Data Set Version</b>	Enter the data set version here. This is used in the NDTMS data extract.
<b>Summary Bar Layout - Client</b>	Leave as 'not in use'.
<b>Summary Bar Layout - Opportunity</b>	Leave as 'not in use'.
<b>Summary Bar Layout - Provider</b>	Leave as 'not in use'.
<b>TYS - X Days before plan review due</b>	Enter a number here to determine the number of days before plan reviews are due that they are displayed in the <b>Plan Review</b> portal.

Field	Instruction
<b>Use Address PostCode Search</b>	Set as 1 to enable addresses to be searched by postcode, otherwise set to 0.
<b>Use Vacancy Search Email Address Only</b>	To use a separate email address for vacancy searches, set to 1. To use the email address of the user managing the vacancy, set to 0. If this field is set to 1, you need to configure the Vacancy Search Email Address system value.
<b>Vacancy Search Confirmation Message</b>	Enter a message to be displayed confirming successfully sent vacancy applications.
<b>Vacancy Search Email Address</b>	If the <b>Use Vacancy Search Email Address Only</b> field is selected, enter the vacancy search email address in here.
<b>WEX - Requires Active Slot to Place Client</b>	Leave as 'not in use'.
<b>Work Experience Placement Duration</b>	Leave as 'not in use'.
<b>X Days User Activity Log Details</b>	Enter the number of days that the activity records are to be stored in the activity log. Records exceeding this time are deleted.
<b>YJ - Case Review - Default Due Days</b>	Enter the number of days after creation cases are to be reviewed.
<b>YJ - Case View - Court Appearances Per Page</b>	Enter the number of court appearances to be displayed on each page in the <b>Court Appearances</b> section.
<b>YJ - Case View - Documents / Notes in Less View</b>	Enter the number of documents and notes to be displayed in the 'less' view. The rest of the documents or notes are displayed by clicking the <b>more</b> button in the panel header.
<b>YJ - Case View - Events Per Page</b>	Enter the number of events to be displayed on each page in the <b>Court Appearances</b> section. It is module specific.
<b>YJ - Case View - Future Events</b>	Enter the number of future events you want to be displayed in the <b>Events</b> panel on client records. The other events are accessible through the <b>more</b> button.
<b>YJ - Case View - X AssetPlus Stages Shown in Less</b>	Enter the number of stages to be listed in the <b>AssetPlus</b> panel on client records in the 'less' view. The other stages are displayed by clicking the more button.
<b>YJ - Client Assets requiring review in future</b>	Enter the number of days before the event that the information is displayed in the alerts view in the YJ Case Managers tool. This function is module specific.
<b>YJ - Clients Appearing in Court in Future</b>	Enter the number of days before the event that the information is displayed in the alerts view in the YJ Case Managers tool. This function is module specific.
<b>YJ - Clients Nearing Intervention Completion Days</b>	Enter the number of days before the event that the event information is displayed in the alerts view in the YJ Case Managers tool. This function is module specific.
<b>YJ - Clients with Report due in court in future</b>	Enter the number of days before the event that the information is displayed in the alerts view in the YJ Case Managers tool. This function is module specific.

Appendix 1: System Values

Field	Instruction
<b>YJ - Countersign Asset Assessments, Plans and Reviews</b>	To require a countersignature in addition to the author's signature to lock assessments, plans or reviews, set this field to 1. To enable authors to lock assessments, plans or reviews with their signature only, set to 0. This function is module specific.
<b>YJ - Countersign RMP/ROSH/VMP</b>	To require a countersignature in addition to the author's signature to lock RMP, ROSH or VMP records, set this field to 1. To enable authors to lock RMP, ROSH or VMP records with their signature only, set to 0. This function is module specific.
<b>YJ - Disable YJ Assets</b>	To prevent all system users from adding or changing assets or new forms, set this field to 1. To permit users to continue using the assets, set to 0.
<b>YJ - Enable AssetPlus</b>	To activate the AssetPlus function, set this field to 1. To disable it, set to 0.
<b>YJ AssetPlus – Enable Case Transfers</b>	Default setting set to 0 until Case Transfers is live.
<b>YJ – Enable Send To placement Via CaseTransfers</b>	Default setting set to 0 for current placements transfers.
<b>YJ AssetPlus – Enable Case Transfers for Schema V3.0.4</b>	Default settings set to 0 until Case Transfers is live.
<b>YJ - Highlight YP Approaching 18</b>	Enter the number of days before the event that the information is to be displayed in the alerts view in <b>my homepage</b> . This function is module specific.
<b>YJ - My Assets - Review Approaching Days</b>	Enter the number of days before the event that the information is to be displayed in the alerts view in <b>my homepage</b> . This function is module specific.
<b>YJ - My Assets - Show ROSH required reminders</b>	Set to 1 to display ROSH required reminders in <b>my homepage</b> , otherwise set to 0.
<b>YJ - My Assets - Show ROSH review due reminders</b>	Set to 1 to display ROSH review reminders in <b>my homepage</b> , otherwise set to 0.
<b>Show Vulnerab plan due reminders</b>	Set to 1 to display Vulnerability Plan reminders in <b>my homepage</b> , otherwise set to 0.
<b>YJ - My Clients Nearing Inter Completion Weeks</b>	Enter the number of weeks before the event that the information is to be displayed in the alerts view in <b>my homepage</b> portal, Client Interventions Ending Within N Weeks. This function is module specific.
<b>YJ - Pre-court Interviews/Decisions n days</b>	Enter the number of days before the event that the information is displayed in the alerts view in the YJ Case Managers tool. This function is module specific.
<b>YJ - Pre-populate Stage Rules</b>	To always pre-populate stage data in any stage following a case closure stage, set this field to 1. To never pre-populate these stages, set to 2. To enable users to decide on a case-by-case basis, set to 3.
<b>YJ - Referrals Received in last Number of Days</b>	Enter the number of days in the past for which you want to display the information in the alerts view in the YJ Case Managers tool. This function is module specific.

Field	Instruction
YJ - Signoff Criteria Explanations	To require the stage section to be signed off prior to completion, leave blank. To remove the need for signoff, set to 'none'. See <a href="#">Stage Signoff</a> on page 86 for more details.
YJ - Signoff Criteria Pathways	To require the stage section to be signed off prior to completion, leave blank. To remove the need for signoff, set to 'none'. See <a href="#">Stage Signoff</a> on page 86 for more details.
YJ - Situation Hours Required for <=16	Enter the number of hours required for a situation to be deemed suitable for a client less than 16 years old. This function is module specific.
YJ - Situation Hours Required for  16	Enter the number of hours required for a situation to be deemed suitable for a client 16 years old or above. This function is module specific.
YJ - Use Automated Message Functionality	Set to 1 to enable the automated message functionality, otherwise set to 0.
YJ - Use Messaging Functionality	Set to 1 to enable the messaging functionality, otherwise set to 0.
YJ - Use new values for FOC	Set to 1 to use the new values for FOC, otherwise set to 0.
YJ - X Number of future events/client	Enter the number of future events to be displayed for each client.
YJ - YJMIS Include Records After Year	Enter the cut-off year (YYYY) for records to be included in the YJMIS reporting.
YJB Connectivity Admin Email Address	Enter the email address to be used in the Connectivity messages for the YOT's administration contact.
YJB Connectivity Archive History Days	Enter the number of days the XML sent/received via Connectivity archive is to be kept. Anything older than this is cleared down. <b>NOTE:</b> <i>The communication record is retained.</i>
YJB Connectivity Hub System ID	Enter the credentials issued by the YJB.
YJB Connectivity Maximum Submission Attempts	Enter the number of attempts Connectivity is to attempt to send an XML message before reporting a failure.
YJB Connectivity Message Expiry Minutes	Enter the number of minutes Connectivity is to attempt to send or wait to receive a response for XML messages before reporting a failure.
YJB Connectivity Organisation Unit Code	Enter the credentials issued by the YJB.
YJB Connectivity Process EYE Submission	To activate Connectivity, set this value to 1. To deactivate Connectivity, set it to 0. When set to 0, Youth Justice does not send EYE documents via Connectivity, so the <b>Destination</b> field in the <b>EYE Submission</b> screen is not displayed.
YJB Connectivity Process YJMIS Submissions	To automatically send newly-generated YJMIS files to the YJB via Connectivity, set this value to 1. If the value is set to 0, newly-generated files are not sent to the YJB. In this circumstance, the files have no destination, and the Completed On values are determined by the date that the DX processing is completed.
YJB Connectivity System ID	Enter the credentials issued by the YJB.



**Appendix 1: System Values**

Field	Instruction
<b>YJB Connectivity Systems Web Service URL</b>	Enter the credentials issued by the YJB.
<b>YJB Connectivity YJSM Web Service URL</b>	Contact YJB for the require URL
<b>YJB MIS Cases Per Part</b>	Enter the number of MIS cases to include per part.
<b>YJB MIS Configuration</b>	Do not change this value without consulting with second line support. This value enables you to configure the parameters controlling the optional elements of the YJB submission. By default all optional elements are switched off.
<b>YSMI Contact %</b>	Set this value for the current rates.
<b>YSMI Participant %</b>	Set this value for the current rates.
<b>YSMI Participant Accredited %</b>	Set this value for the current rates.
<b>YSMI Participant Recorded %</b>	Set this value for the current rates.
<b>YSMI Population Accredited %</b>	Set this value for the current rates.
<b>YSMI Population Recorded %</b>	Set this value for the current rates.



# 26 | Appendix 2: Lookup Tables

The tables in this section indicate which lookups are:

- **System Records** - Lookups listed in red and with “ - SYSTEM RECORD” in the dialog header are core system values and should not be changed. They are used in different procedures and reporting functions. You cannot delete these lookups. If you believe you need to change or deactivate any of these lookups, contact One Application Support.
- **Mapping** - Lookups used for mapping are involved in exporting data for statutory government returns, e.g. the NCCIS monthly XML report, the September Guarantee and the Annual Activity Survey. These values should not be changed or deleted without One Application Support consultation.
- **Simple Lookups** - These lookups only require a description to be entered. No other configuration is necessary.
- **Complex Lookups** - Complex lookups required unique and advanced configuration techniques and understanding. The configuration of each complex lookup is described explicitly in this handbook.

The following lookups are not controlled through the One IYSS System Administration Client, they are pulled through from Capita One:

- **Carer Contacts | Relationship Type**
- **Client | Additional Needs | Primary SEN Category**
- **Client | Additional Needs | Secondary SEN Category**
- **Client | Additional Needs | SEN Status**
- **Client | Summary | Address**
- **Client | Summary | Ethnicity**
- **Client | Summary | Ethnicity Source**
- **Client | Summary | Gender**
- **Client | Summary | Nationality**
- **Client | Summary | Preferred Language**

Each of the following matrices represents a folder in the One IYSS System Administration Client. Each matrix provides a One IYSS address for the lookup, indicates whether it is simple or complex, whether it is used for mapping and whether it is a system record.

## Address

Lookup	Address	Further Information	System?	Used for Mapping?
Connexions Partnership	No longer used.			

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Geographical Grouping Type</b> (Complex)	<b>Client   Summary   Postcode Groupings</b>	Geographical areas deduced from clients' postcodes or that of their situation provider, e.g. Ward, District.  For more information, see <a href="#">Geographical Grouping Type</a> on page 54.	y	n
<b>Geographical Area</b> (Simple)	<b>Client   Aspirations   Desired Locations</b>  <b>Opportunity   General   Geog Area</b>  <b>Provider   Summary   Geographical Area</b>	Matches clients with opportunities. Should be kept to a manageable number of areas to facilitate usage, e.g. City Centre, Inner East, Outer East.	n	n
<b>TEC area</b> (Simple)	<b>Client   Administration   LSC area</b>	Identifies the Learning and Skills Council responsible for the clients, e.g. Yorkshire and the Humber, West Midlands.	n	n

## Assessments

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Assessment Element</b> (Complex)	<b>Client   Documents, Notes and Assessments   Assessments   Assessment Elements</b>	Identifies elements within assessments, e.g. Participation, Key Skills and Housing in the APIR assessment.	n	n
<b>Assessment Progress Set</b> (Complex)	<b>Client   Documents, Notes and Assessments   Assessments   Are issues being addressed</b>	Identifies client progress against each element, e.g. Is the Housing element of APIR being addressed? Yes, No, More information required.  For more information, see <a href="#">Assessments</a> on page 42.	n	n
<b>Assessment Template</b> (Complex)	<b>Client   Documents, Notes and Assessments   Assessments</b>	Collates all assessment values to create a single assessment template, e.g. APIR; Jobs and Skills Action Plan.  For more information, see <a href="#">Assessments</a> on page 42.	n	n
<b>Assessment Value Set</b>	<b>Client   Documents, Notes and Assessment   Assessments</b>	Identifies client ratings against each element, e.g. for APIR: Critical or complex issues, No issues, Positive strength.  For more information, see <a href="#">Assessments</a> on page 42.		

## Client

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Additional Needs - Plan Reason</b> (Simple)	<b>Client   Additional Needs   Plan Details   Not Completed Reason</b>	Explains why assessment* is incomplete, e.g. Unable to contact client.  *Assessment section may be 140, 130 or MOP depending on local language.	n	n
<b>Additional Needs - Plan Status</b> (Simple)	<b>Client   Additional Needs   Plan Details   Status</b>	Identifies how assessment* has been completed, e.g. Completed, Refused.  *Assessment section may be 140, 130 or MOP depending on local language.	y	n
<b>Aspiration Types</b> (Complex)	<b>Client   Aspiration</b>	Identifies the life situation to which the client aspires, e.g. Employment/Training.	y	n
<b>Aspiration Sub Types</b> (Simple)	<b>Client   Aspiration   Sub Type</b>	Provides more details about the Aspiration Type, e.g. Employment with Training, Employment Without Training.	y	n
<b>Baseline Header</b> (Complex)	<b>Client   Baseline   Baseline</b>	Creates sub-cohorts of clients of whom a census can be taken, e.g. the annual September Guarantee.  For more information, see <a href="#">Baseline Management</a> on page 48.	n	y
<b>Baseline Status</b> (Complex)	<b>Client   Baseline   Status</b>	Identifies clients' statuses under each baseline, e.g. the annual September Guarantee may have the status 'Offer of education and training to start by October Conditional'.  For more information, see <a href="#">Baseline Management</a> on page 48.	y	y
<b>Baseline Status Group</b> (Simple)	<b>Reporting</b>	Groups statuses together for reporting purposes, e.g. No Offer Made, Not Ready for Learning.  For more information, see <a href="#">Baseline Management</a> on page 48..	y	y
<b>Benefit Claim Status</b> (Simple)	<b>Client   Benefit and Allowances   Claim Status</b>	Identifies the status of clients' benefit claims, e.g. Rejected, Pending, Successful.	y	n

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Benefit Type</b> (Complex)	<b>Client   Benefit and Allowances   Benefit Type</b>	Identifies the type of benefit clients are claiming or attempting to claim, e.g. Housing.	n	n
<b>Caseload Type</b> (Complex)	<b>Client   Professional Contacts   Caseload Type</b>  <b>Client Search   Caseload   Caseload Type</b>	Identifies differences between clients in a caseload depending on how the PA is working with them, e.g. Active, Passive, Low.	n	n
<b>Client in Danger Reason</b> (Simple)	<b>Client   Client in Danger</b>	Informs ContactPoint why a record has been shielded.	n	n
<b>Endorsement Category</b> (Simple)	<b>Client   Additional Needs   Endorsement Category</b>	Identifies whether clients can be endorsed for training purposes, e.g. ALN (Additional Learning Needs), ASN ( Additional Social Need).	y	n
Examination Board (Simple)	<b>Client   Qualifications and Achievements   Examination Board</b>	Identifies the exam board governing relevant qualifications, e.g. AQA, RSA.	n	n
Health Status	This function is not in use in One IYSS			
<b>Individual Circumstance Type</b> (Complex)	<b>Client   Individual Circumstances   Individual Circumstance</b>	Identifies clients' individual circumstances, e.g. Looked After, Pregnant.	y	y
<b>Intended Destination Post 16</b> (Simple)	<b>Client   Aspirations   Post 16 Intended Destination   Intended Destination</b>	Indicates clients' post-Year 12/13 intentions, e.g. Higher Education, Undecided/Unknown.	y	n
<b>Intended Destination Pre 16</b> (Simple)	<b>Client   Aspirations   Year 11 Intended Destination   Intended Destination</b>	Indicates clients' post-Year 11 intentions, e.g. Staying at same school, Undecided/Unknown.	y	y
<b>Interview Priority</b> (Simple)	<b>Client   Administration   Interview Priority</b>	Identifies clients who need interviews soonest, e.g. Low, Medium, High.	n	n
<b>Interview Priority Reason</b> (Simple)	<b>Client   Administration   Interview Priority Reason</b>	Provides reasons why clients have certain interview priorities, e.g. Unrealistic Ideas, Poor Attendee.	n	n

Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Key Skill</b> (Simple)	<b>Client   Qualifications and Achievements   Skills In</b>  <b>Opportunity   General   Skills In</b>	Identifies skills not otherwise indicated by qualifications. Assists with employment recruitment by matching client skills to employer requirements, e.g. ICT, Teamwork.	n	n
<b>Level of Need</b> (Simple)	<b>Client   Individual Circumstances   Level of Need</b>  <b>Caseload Management</b>  <b>Cohort Management</b>	Identifies client levels of need as defined by CCIS, e.g. Minimum Intervention, Intensive Support.	y	y
<b>Positive Activities</b> (Simple)	<b>Client   Qualifications and Achievements   Achievements and Positive Activities   Activities</b>	Identifies the types of positive activity undertaken by clients as part of the annual Participation in Positive Activities survey, e.g. Sports Club or Class, Youth Club	y	n
<b>Positive Activity Barriers</b> (Simple)	<b>Client   Qualifications and Achievements   Achievements and Positive Activities   Barriers</b>	Identifies barriers preventing clients from participating in positive activities, e.g. Too Expensive, No Provision in the Area.	y	n
<b>Positive Activity Involvement</b> (Simple)	<b>Client   Qualifications and Achievements   Achievements and Positive Activities   Involved</b>	Identifies whether clients have been involved with positive activities, e.g. Yes, No, Don't Know.	y	n
<b>Positive Activity Occurrence</b> (Simple)	<b>Client   Qualifications and Achievements   Achievements and Positive Activities   Occurrence</b>	Indicates the frequency with which clients have been involved with positive activities, e.g. Once, Twice, Can't Remember.	y	n
<b>Positive Activity Responses</b> (Simple)	<b>Client   Qualifications and Achievements   Achievements and Positive Activities   Weekend</b>	Indicates whether clients have access to positive activities, e.g. Agree, Disagree, Don't Know.	y	n
<b>Positive Activity Source</b> (Simple)	<b>Client   Qualifications and Achievements   Achievements and Positive Activities   Source</b>	Identifies the source of information used for the Positive Activities survey, e.g. Paper Survey, Verbal.	y	n

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Project</b> (Complex)	<b>Client   Situations</b>	Creates a secondary situation to enable collection of time-bound locally specified data. Provides five configurable fields, e.g. Millennium Volunteers, Green Apples.	n	n
<b>Qualification Diploma Type</b> (Complex)	<b>Client   Qualifications and Achievements   Qualifications   Type</b>	Identifies the types of 14-19 Diploma being taken by clients, e.g. Public Services, Creative and Media.  For more information, see <a href="#">Specific Qualification Level</a> on page 75.	y	n
<b>Qualification Subject</b> (Simple)	<b>Client   Qualifications and Achievements   Qualifications   Subject</b>	Identifies individual subjects being studied by clients, e.g. English, Maths.	n	n
<b>SEN Category</b> (Simple)	<b>Client   Additional Needs   Primary SEN Category</b>  <b>Client   Additional Needs   Secondary SEN Category</b>	Values are imported from the Capita One system, e.g. MSI (Multi-Sensory Impairment), VI Visual Impairment).	y	n
<b>Sexual Health Contact Type</b> (Simple)	<b>Client   Sexual Health   Contact Type</b>	Makes records of the types of contact used for delivering sexual health services, e.g. Group Session, One to One.	n	n
<b>Sexual Health Cur Contr Use</b> (Simple)	<b>Client   Sexual Health   Current Contraceptive Use</b>	This identifies the types of contraceptives used by clients, e.g. None, Contraceptive Pill, Condom.  A Youth Service licence is needed to access this section of client records.	n	n
<b>Sexual Health Items</b> (Simple)	<b>Client   Sexual Health   Items Issued</b>	Identifies the sexual health products or services issued, e.g. Pregnancy Test, Condoms.	n	n
<b>Sexual Health LGBT</b> (Simple)	<b>Client   Summary   LGBT</b>	Identifies clients' sexual orientation, e.g. Lesbian, Gay.  This field is only displayed in the <b>Client Summary Change</b> screen.	n	n
<b>Sexual Health Referral Source</b> (Simple)	<b>Client   Sexual Health   Referral Source</b>	Identifies how clients are put in touch with sexual health services, e.g. Connexions Website, Social Services.	n	n



## Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Sexual Health Referrals</b> (Simple)	<b>Client   Sexual Health   Referral To</b>	Identifies to whom clients have been referred as part of their sexual health record, e.g. GP, PCT.	n	n
<b>Sexual Health Topics</b> (Simple)	<b>Client   Sexual Health   Topics Discussed</b>	Identifies the topics and services that have been discussed with clients, e.g. Pregnancy, STIs.	n	n
<b>Shared Information Type</b> (Simple)	<b>Client   Consent   Information Sharing</b>	Identifies the type of data the client has agreed to share with others as part of Data Protection consent, e.g. Criminal Record, Health Issues.	n	n
<b>Situation Change Reason</b> (Simple)	<b>Clients   Situations   Reason for Change</b>	Identifies why clients leave situations, e.g. Sacked, Found Employment.	n	n
<b>Situation Group</b> (Complex)	<b>Client   Situations   Situations Opportunity   Summary   Situation Group</b>	Identifies the situations of clients and opportunities, e.g. NEET, Statutory Education.  For more information, see <a href="#">Situation Management</a> on page 77	y	y
<b>Situation Status</b> (Complex)	<b>Client   Situations   Situations</b>	Enables the length of time clients spend in certain situations to be tracked and displayed on client records, e.g. 0 - 3 months, 6+ months.  Status is calculated overnight and displayed in client record. There is also a search field available.	n	n
<b>Situation Sub Group</b> (Complex)	<b>Client   Situations   Situations Opportunity   Summary   Situation Group</b>	Identifies client and opportunity situation sub groups, e.g. Not Work Ready, Year 11. Can define whether the Actively Seeking alert is triggered when changing client situations.  For more information, see <a href="#">Creating Situation Sub Groups</a> on page 77.	y	y
<b>Situation Super Group</b> (Complex)	<b>Client Search Opportunity   Summary</b>	Organises Situation Groups by type, e.g. Education, Employment.  For more information, see <a href="#">Creating Situation Super Groups</a> on page 80.	y	n
<b>Situation Verification Source</b> (Simple)	<b>Client   Situations   Situations</b>	Identifies the source of situation expiry confirmation, e.g. Family Member, School/College.	y	n

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Special Needs Support</b>	This function is not in use in One IYSS			

## Client Substance Misuse

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Client SM - Accommodation Needs</b> (Simple)	<b>Client   Episode   Accommodation</b>	Identifies clients' current living arrangements, e.g. No Fixed Abode, Living with Relative.	Y	Y
<b>Client SM - Children</b>	This function is not in use in One IYSS			
<b>Client SM - Child Living With</b>				
<b>Client SM - DAAT of Residence</b> (Simple)	<b>Client   Episode   DAAT of Residence.</b>	Identifies the DAAT team boundaries within which the client resides, e.g. Leeds - South.	Y	Y
<b>Client SM - Discharge</b> (Simple)	<b>Client   Treatment Exit   Discharge Reason</b>	Identifies the reasons for which clients were discharged, e.g. Treatment complete - drug free.	Y	Y
<b>Client SM - Discharge Dest</b> (Simple)	<b>Client   Client   Treatment Exit   Discharge Destination</b>	Identifies to whom the client is being discharged, e.g. Lead Professional, Targeted Youth Support.	Y	Y
<b>Client SM - Drug</b> (Simple)	<b>Client   Episode   Main Drug</b> <b>Client   Episode   Secondary Drug</b> <b>Client   Episode   Third Drug</b>	Identifies the types of drugs clients use, e.g. Cannabis, Ketamine.	Y	Y
<b>Client SM - Drug-Alcohol Use</b> (Simple)	<b>Client   Treatment Exit   Reduced Drug / Alcohol Use</b>	Identifies clients' reductions in substance misuse at the treatment exit stage, e.g. Stayed the Same, Drug free.	Y	Y
<b>Client SM - Education Status</b> (Simple)	<b>Client   Episode   Education Status</b>	Identifies clients' educational statuses, e.g. Mainstream Education, Permanently Excluded.	Y	Y
<b>Client SM - Employment Status</b> (Simple)	<b>Client   Episode   Employment Status</b>	Identified clients' employment statuses, e.g. Economically Inactive, Regular Employment.	Y	Y

Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Client SM - Hep B Inter Status</b> (Simple)	<b>Client   Episode   Hep B Intervention Status</b>	Identifies clients' Hepatitis B intervention statuses, e.g. Immunised Already.	Y	Y
<b>Client SM - Hep C Inter Status</b> (Simple)	<b>Client   Episode   Hep C Intervention Status</b>	Identifies clients' Hepatitis C intervention statuses, e.g. Immunised Already.	Y	Y
<b>Client SM - Injecting Status</b> (Simple)	<b>Client   Episode   Injecting Status</b>	Identifies whether clients inject, e.g. Currently Injecting, Previously Injected.	Y	Y
<b>ClientSM - Inter Setting</b>				
<b>Client SM - Local Authority</b> (Simple)	<b>Client   Episode   Local Authority</b>	Identifies LA in which clients live, e.g. Sheffield.	Y	Y
<b>Client SM - Offered STI Screen</b>				
<b>Client SM - Offered Support</b>				
<b>Client SM - PCT of Residence</b> (Simple)	<b>Client   Episode   PCT of Residence</b>	Identifies Primary Care Trust boundaries within which clients live, e.g. Sunderland Teaching PCT.	Y	Y
<b>Client SM - Parental Status</b> (Simple)	<b>Client   Episode   Parental Status</b>	Identifies clients' parental statuses, e.g. Not a Parent, All Children Live with Client.	Y	Y
<b>Client SM - Referral Source</b> (Simple)	<b>Client   Substance Misuse Referral   Referral Source</b>	Identifies the agencies referring clients for Substance Misuse services, e.g. Frank, YOT.	Y	Y
<b>Client SM - Route of Admin</b> (Simple)	<b>Client   Episode   Main Drug Route</b> <b>Client   Episode   Secondary Drug Route</b> <b>Client   Episode   Third Drug Route</b>	Identifies clients' methods of drug administration, e.g. Oral, Inject, Smoke.	Y	Y
<b>Client SM - Sexuality</b> (Simple)	<b>Client   Episode   Sexuality</b>	Identifies clients' sexuality, e.g. Heterosexual, Gay.	Y	Y
<b>Client SM - Treatment Delivered</b>				
<b>Client SM - YesNoNotAsked</b>				

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Client SM-Hep B Vacc Count</b> (Simple)	<b>Client   Episode   Hep B Vaccination Count</b>	Identifies clients' Hepatitis B vaccination counts, e.g. One Vaccination Completed Course.	Y	Y
<b>Client SM-Lead Prof Treat Exit</b> (Simple)	<b>Client   Treatment Exit   Lead Professional</b>	Identifies the types of organisation taking the Lead Professional roles on clients' exit from treatment, e.g. Drug Agency, Not Known.	Y	Y
<b>Client SM-Modality Exit Status</b> (Simple)	<b>Client   Treatment   Treatment Exit Status</b>	Identifies why clients have ended treatment, e.g. Mutually agreed planned exit, Client unilateral unplanned exit.	Y	Y
<b>Client SM-Sex Worker Category</b> (Simple)	<b>Client   Episode   Sex Worker Category</b>	Identifies if clients are sex workers, e.g. Not a sex worker, Selling sex from the street.	Y	Y
<b>Client SM-Sexually Active</b>				
<b>Client SM-TOP Treatment Stage</b> (Simple)	<b>Client   Treatment Outcome Profile   Treatment Stage</b>	Identifies the stage of the Treatment Outcome Profile, e.g. Start.	Y	Y
<b>Client SM-Treat modality serv</b>				
<b>Client SM - Treatment Prov Types</b> (Simple)	<b>Client   Treatment   Treatment Type</b>	Identifies the treatment type clients are receiving, e.g. Psychosocial Intervention, Family Work.	Y	Y

## Common

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Attribute</b> (Complex)	<b>Client   Administration   Additional Attributes</b>  <b>Provider   Details   Other Attributes</b>  <b>Opportunity   General   Other Attributes</b>	Multi-select fields that enable administrators to capture true/false data not available in the rest of client, provider or opportunity records, e.g. Do Not Email, Year Behind.	N	N

Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Centre</b> (Complex)	<b>Client   Administration   Managing Centre</b>  <b>Opportunity   General   Managing Loc</b>  <b>YS Activity   Summary   Locality</b>  <b>YS Session   Summary   Staff Attending   Filter By Locality</b>	Identifies the centres managing clients and opportunities, e.g. Seacroft.  Where clients' postcodes are unknown, the NCCIS XML extract will use their centre's postcode for reporting purposes.	N	Y
<b>Health Issue</b> (Complex)	<b>Client   Additional Needs   Health Issues</b>  <b>Opportunity   Health and Safety   Health Issues</b>	Identifies clients' health issues and feeds these into the special needs information, and identifies where clients' health may be affected by certain opportunities, e.g. Asthma, Dyslexia.	N	N
<b>Occupational Area Group</b> (Complex)	<b>Client   Aspirations   Aspirations   Employment/Training   Group</b>  <b>Client   Aspirations   Aspirations   Work Experience   Group</b>  <b>Client   Aspirations   Year 11 intended Destination   Occupational Area</b>  <b>Client   Aspirations   Post 16 Intended Destination   Occupational Area</b>  <b>Client   Situations   Occupational Area</b>  <b>Opportunity   General   Occupational Area</b>	This informs different areas of One IYSS about the type of employment clients have or are seeking, e.g. Agriculture, Hairdressing and Beauty.  In Aspirations, this identifies clients' occupationally-based post 16/Year 11 intended destinations. It also identifies jobs and training currently being sought by clients, and assists with vacancy matching.  In Situations, this identifies the types of jobs and training clients have entered. The data here informs the DCSF returns.  In Opportunities, this identifies the types of jobs, training and WEX opportunities being offered. This assists with vacancy matching.  For more information, see <a href="#">Occupation Management</a> on page 64.	N	Y

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Overall Qualification Level</b> (Complex)	<b>Client   Qualifications and Achievements   Actual Qualification Level</b>  <b>Client   Qualifications and Achievements   Potential Qualification Level</b>  <b>Opportunity   General   Inbound Qualification Level</b>	Identifies clients' actual and potential overall academic achievement levels, e.g. NVQ Level 2.  It also identifies qualification levels sought by employers, and can provide vacancy matching.	Y	N
<b>Phone Number Extra Info</b> (Simple)	<b>Provider   Contact   Contact Details</b>	Provides additional information for recorded telephone numbers, e.g. Ex-directory, Evenings only.	N	N
<b>Specific Qualification Level</b> (Complex)	<b>Client   Situations   Course Level</b>  <b>Client   Qualifications and Achievements   Qualifications</b>  <b>Opportunity   General   Outbound Qualification Level</b>	In Situations, this identifies the level of qualification clients will attain if they successfully complete the situation.  In Qualifications, this identifies the level at which subjects are being studied, e.g. GCSE.  In Opportunities, this identifies the level of qualification clients will attain if they successfully complete the opportunity.	N	N
<b>Submission Status</b> (Complex)	<b>Client   Opportunity Submissions   Status</b>	Identifies where clients are in relation to submission processes, e.g. CV Sent, Interview Arranged.	N	N
<b>Submission Unsuccessful Reason</b> (Simple)	<b>Client   Opportunity Submission   Not Started Reason</b>	Identifies why clients were unsuccessful with submissions to opportunities, once concluded, e.g. Did Not Attend Interview.	N	N

## ContactPoint

Lookup	Address	Further Information	System?	Used for Mapping?
<b>CP - Consent Source</b> (Simple)	<b>Client   ContactPoint Administration   Consent Source</b>	Identifies who agreed to share the data with ContactPoint, e.g. Client, Mother, Father.	n	n
<b>CP - Retention Period</b> (Simple)	<b>Client   ContactPoint Administration   Retention Period</b>	The length of time agreed for data to be shared, e.g. 1 Year, 2 Years.	y	n

## Document and Paragraphs

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Document Type</b> (Complex)	<b>Client   Documents Notes and Assessments   Document Type</b> <b>Provider   Documents and Notes   Document Type</b> <b>Opportunity   Documents and Notes   Document Type</b>	Organises document templates by type, e.g. CV, Action Plan.	N	N
<b>User Document Group</b> (NA)	<b>Homepage   IYSS Links   View User Document</b>	Creates folders to group documents in the View User Document facilities, e.g. How To Guides, User Group Minutes.	NA	NA

## Import

See the [Importing data](#) chapter on page 141 for more information regarding import lookups.

## Interactions

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Default Interaction</b> (Complex)		The interactions used by the system.	Y	N
<b>Interaction Activity Type</b> (Complex)	<b>Client   Interactions</b> <b>Provider   Interactions</b>	Identifies available activities within an interaction, e.g. Action Plan Completed.  For more information, see <a href="#">Interaction Management</a> on page 59.	N	N
<b>Interaction Category</b> (Simple)	<b>Client   Interactions</b> <b>Provider   Interactions</b>	Identifies the category into which the interaction fits, e.g. Activity Survey, Guidance.  For more information, see <a href="#">Interaction Management</a> on page 59.	N	N
<b>Interaction Outcome</b> (Complex)	<b>Client   Interactions</b> <b>Provider   Interactions</b>	Identifies interactions outcomes, e.g. Client DNA Interview, Follow Up.  For more information, see <a href="#">Interaction Management</a> on page 59.	N	N

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Interaction Type</b> (Complex)	<b>Client   Interactions</b> <b>Provider   Interactions</b>	Identifies the interaction type, e.g. PA Interview, Follow Up. It also links the interaction options together.  For more information, see <a href="#">Interaction Management</a> on page 59.	N	N
<b>Venue</b> (Simple)	<b>Client   Interactions</b> <b>Provider   Interactions</b>	Identifies the location of the interactions, e.g. School, Job Centre.  For more information, see <a href="#">Interaction Management</a> on page 59.	N	N

## Personal Development Activities

Lookup	Address	Further Information	System?	Used for Mapping?
<b>PD Category</b> (Simple)	<b>Opportunity   Summary   Category</b>	Categorises the personal development opportunities, e.g. Arts, Health, Leisure.	N	N
<b>PD District</b> (Simple)	<b>Provider   Personal Development Details   Districts</b> <b>Personal Development Opportunity   Summary   District</b>	Identifies the area in which the personal development provider or opportunity are found, e.g. East, Inner East.	N	N
<b>PD Organisation</b> (Simple)	<b>Provider   Personal Development Details   Organisation Type</b>	Identifies the type of organisation running the opportunity, e.g. Charity, Voluntary Body.	N	N
<b>PD Provider CRB Checked</b> (Simple)	<b>Provider   Personal Development Details   CRB Checked</b>	Indicates whether the provider carries out CRB checks on volunteers and staff, e.g. CRB Evidence Seen.	Y	N
<b>PD Provision Types</b> (Simple)	<b>Provider   Personal Development Details   Type of Provision</b>	Identifies types of personal development activities offered, e.g. Volunteering, Youth Club.	N	N



## Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>PD Target Group</b> (Simple)	<b>Provider   Personal Development Details   Target Group</b>  <b>Personal Development Opportunity   Summary   Target Group</b>	Identifies groups targeted by the provider or opportunity, e.g. 14 - 19 Year Olds, Years 7 - 11	N	N

## Provider & Opportunity

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Agency Type</b> (Simple)	<b>Provider   Summary   Agency Type</b>  <b>Client   Individual Circumstance   Link to Agency   Agency Type</b>	Identifies what type of agency the provider is, e.g. Mental Health, Teenage Pregnancy.	Y	N
<b>EBP Activity Category</b> (Simple)	<b>Provider   EBP Activities   Category</b>	Identifies provider involvement with education business partnership activities, e.g. Actively Involved, Will Consider, Will Not Consider.	N	N
<b>EBP Activity Code</b> (Simple)	<b>Provider   EBP Activities   Activity</b>	Identifies the type of education business activity offered by providers, e.g. Practice Interviews, School Talks.	N	N
<b>EBP Team</b>	This function is not in use in One IYSS.			
<b>H &amp; S Issue</b> (Complex)	<b>Provider   Health and Safety Details   Health and Safety Issues</b>  <b>Opportunity   Health and Safety Details   Health and Safety Issues</b>	Identifies health and safety issues needing attention when on site with a provider or opportunity, e.g. Hard Hat Area, Cold Environment.	N	N
<b>H &amp; S Registration</b> (Simple)	<b>Provider   Health and Safety Details   Health and Safety Registered With</b>	Identifies with whom the provider is registered for health and safety purposes, e.g. Health and Safety Executive.	N	N
<b>High Level Subject Area</b> (Simple)	<b>Opportunity   Summary</b>  <b>Client   Opportunity Submission</b>	For use in further education opportunity records, e.g. AS Levels.	Y	N

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Institute Type</b> (Simple)	<b>Provider   Details   Institute Type</b>	Identifies education providers by institution type, e.g. Grant Maintained, Independent School.	N	N
<b>Insurance Company</b> (Simple)	<b>Provider   Health and Safety Details   Insurance   Insurers</b>	Identifies the provider's insurer covering public and employee liability, e.g. Prudential, National Farmers Union.	N	N
<b>Internet Opp Category</b> (Simple)	<b>Public opportunity search module</b>	Enables System Administrators to create client friendly occupational sub groups, e.g. Motor Vehicle Trades, Office Work.  This supports One IYSS public opportunity search modules.  For more information, see <a href="#">Occupation Management</a> on page 64.	N	N
<b>Internet Opp Narrative Type</b> (Complex)	<b>Public opportunity search module</b>	Enables System Administrators to display narrative sections of opportunities.  This supports One IYSS public opportunity search modules.  For more information, see <a href="#">Occupation Management</a> on page 64.	Y	N
<b>Lunch Arrangements</b>	This function is not in use in One IYSS.			
<b>Opportunity Narrative Type</b> (Simple)	<b>Opportunity   Narratives</b>	Creates memo fields to add narrative content to opportunities, e.g. Detailed Duties, Payment Details.	N	N
<b>Opportunity Place Outcome</b> (Simple)	<b>Opportunity   Monitoring   Status</b>	Identifies the status of opportunity places, e.g. Active, Filled by Others, cancelled.	Y	N
<b>Opportunity Status</b> (Simple)	<b>Opportunity   Summary   Status</b>	Identifies the status of opportunities, e.g. Live, Suspended, Cancelled.	Y	N
<b>Opportunity Type</b> (Complex)	<b>My Homepage   New opportunity</b>	Enables configuration of the options that are displayed under the Opportunity Types, e.g. Vacancy, Training.	Y	N
<b>Protective Clothing</b> (Simple)	<b>Opportunity   Health and Safety   Protective Equipment Supplied</b>	Identifies protective equipment supplied by provider when starting an opportunity, e.g. Gloves, Goggles.	N	N

## Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Provider Contact Role</b> (Simple)	<b>Provider   Contacts   Role</b>	Categorises providers' different contact roles, e.g. HR Adviser, Director, Careers Teacher.	N	N
<b>Provider Role Type</b> (Complex)	<b>Provider   Contacts   Role</b>	Enables Provider Contact Roles to be filtered by Provider Type, e.g. Employer General, School General.	N	N
<b>Provider HS Status</b> (Simple)	<b>Provider   Health and Safety   Health and Safety</b>	Identifies providers' health and safety status and warns of unapproved providers, e.g. Approved, Not Applicable.	N	N
<b>Provider Size Band</b> (Simple)	<b>Provider   Provider LMI   Size Band</b>	Identifies number of people employed by providers, e.g. 0 - 5, 500+.	N	N
<b>Provider Status</b> (Simple)	<b>Provider   Summary   Status</b>	Identifies status of entire provider records, e.g. Live, Inactive.	Y	N
Provider Turnover Band (Simple)	<b>Provider   Provider LMI   Turnover Band</b>	Identifies providers' annual turnover, e.g. £500,000 - £999,999, Over £100,000.	N	N
Provider Type (Simple)	<b>Provider   Summary   Type</b>	Identifies the type of provider record and configures fields in the rest of the record accordingly, e.g. Employer, School, Training Provider.	Y	N
<b>Risk Category</b> (Complex)	<b>Opportunity   Summary   Risk Category</b>	Identifies opportunity risk levels, e.g. Low, Medium, High.	N	N
<b>SIC Code</b> (Simple)	<b>Provider   Provider LMI   SIC</b>	Identifies under which Standard Industrial Classifications providers are classified, e.g. Metal Goods Manufacturer, Wholesale Distribution.	N	N
<b>SIMS Version</b>	This function is not in use in One IYSS.			
<b>SOC Code</b> (Simple)	<b>Opportunity   General   SOC Code</b>	Only shown in the opportunity record, this is the four digit Standard Occupational Classification (SOC) number which links to all occupational groupings, e.g. 1132, 2000.  For more information, see <a href="#">Occupation Management</a> on page 64.	N	Y
<b>School Dates</b> (Complex)	<b>Client   Situation   Statutory Education Leaving Date</b>	Defines key dates in client records by year, e.g. 2017.	N	Y

Lookup	Address	Further Information	System?	Used for Mapping?
<b>School Year Group</b> (Simple)	<b>Client   Situation   Year Group</b>	Identifies clients' actual year groups in cases where clients are moved forward or held back a year, e.g. Year 11.	Y	Y
<b>Vacancy Contract Type</b> (Simple)	<b>Opportunity   Summary   Contract Type</b>	Identifies contract types offered by opportunities, e.g. Full Time, Temporary.	N	N
<b>Vacancy Handling Priority</b> (Simple)	<b>Opportunity   General   Handling Priority</b>	Identifies what priority levels are given to vacancies being processed, e.g. Low, High.	N	N
<b>Vacancy Pay Band</b>	This function is not in use in One IYSS.			
<b>Vacancy Pay Period</b>	This function is not in use in One IYSS.			
<b>Vacancy Source</b> (Simple)	<b>Opportunity   General   Source</b>	Identifies who first received each vacancy, e.g. Connexions, Job Centre Plus.	N	N
<b>Working Hours</b>	This function is not in use in One IYSS.			

## Security

See [Security Groups](#) on page 22 for more information regarding these lookups.

## Statistics

Refer to the *DX Manual* for more information regarding these lookups.

## System

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Client ID Description</b> (Simple)	<b>Client   Administration   IDs</b>	Enables System Administrators to change the descriptions of local ID fields to capture identifiers unique to the locale, e.g. Connexions Card, NI Number.	Y	N
<b>Lookup Header</b> (Complex)		Enables System Administrators to determine whether lookup fields are determined by user-defined sort sequences.	Y	N
<b>System Value</b> (Complex)		Sets system-wide values. See <a href="#">Appendix 1: System Values</a> on page 166.	Y	Y

## Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Useful Links</b> (Complex)	<b>My Homepage   Useful Links</b>	Creates hyperlinks to external internet resources that are displayed in my homepage, e.g. BBC, DCSF, Every Child Matters.	N	N

## TYS

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Client YYS - Age Police Contact</b> (Simple)	<b>Client   Crime Prevention Case   Age at first Police Contact</b>	The age when first contacted by police, e.g. 11, 12, Don't Know.	Y	N
<b>Client YYS - Case Outcome</b> (Complex)	<b>Client   Crime Prevention Case   Case Outcome</b> <b>Client   Other YYS Case   Case Outcome</b> <b>Client   Teenage Pregnancy Case   Case Outcome</b>	Case Outcomes are filtered by Service to enable the use of service-specific options, e.g. Left Early, Reoffended, Gave Birth.	N	N
<b>Client YYS - Case Type</b> (Complex)	<b>Client   Crime Prevention Case   Case Type</b> <b>Client   Other YYS Case   Case Type</b> <b>Client   Teenage Pregnancy Case   Case Type</b>	Case Types are filtered by Service to enable the use of service-specific options, e.g. Reoffending Risk, Emergency Housing.	N	N
<b>Client YYS - CR Offence</b> (Simple)	<b>Client   Crime Prevention Case   Community Resolution   Offence</b>	Possible offences, e.g. Criminal Damage, Theft from Car.	N	N
<b>Client YYS - CR Outcome</b> (Simple)	<b>Client   Crime Prevention Case   Community Resolution   Outcome</b>	Possible outcomes, e.g. Client Absconded, Returned to Custody.	N	N
<b>Client YYS - CR Recommendation</b> (Simple)	<b>Client   Crime Prevention Case   Community Resolution   Recommendation</b>	Possible recommendations, e.g. Community Order, Victim Liaison.	N	N

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Client TYS - Current/Previous NoDK</b> (Complex)	<b>Anywhere where the values of Current, Previous or Don't Know are found in TYS.</b>  <b>Client   all service types   History of Care:</b>  <b>Accommodated by voluntary agreement with parents</b>  <b>Subject to Care Order</b>  <b>On Child Protection Register</b>  <b>Subject to CAF</b>	Provides the Current, Previous, No, Don't Know options for the relevant fields.	Y	N
<b>Client TYS - Homeless Sub Cat</b> (Simple)	<b>Client   all service types   Homeless Sub Category</b>	Describes homeless clients' current living arrangements, e.g. Hostel, Night Shelter, Roofless.	Y	N
<b>Client TYS - Living With</b> (Simple)	<b>Client   all service types   Accommodation and Family Details   YP Living With</b>	Provides details of person with whom clients are currently living, e.g. Care of LA, Sibling, Father.	N	N
<b>Client TYS - Referral Outcome</b> (Complex)	<b>Client   all service types   Referral Outcome</b>	Identifies why a referral was closed. Referral Outcomes are filtered by Service to enable the use of service-specific options, e.g. Unilateral Departure, Mutually Agreed Departure.	N	N
<b>Client TYS - Referral Source</b> (Simple)	<b>Client   all service types   Referral Source</b>	Identifies the organisation that referred the client, e.g. School, PCT, Police.	N	N
<b>Client TYS - Victim Type</b> (Simple)	<b>Client   Crime Prevention Case   History of Offending   Victim Type</b>	Enables details to be provided about offences with victims, e.g. Racially Motivated, Specific, Targeted Victim(s).	Y	N

## Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Client TYS - YesDKNA</b> (Complex)	<b>Anywhere where the values of Yes, Not Applicable or Don't Know are found in TYS</b>  <b>Client   Crime Prevention Case   Educational Attendance Known</b>  <b>Frequency of Police Contact Known</b>	Provides the Yes, No, Don't Know options for relevant fields.	Y	N

## YJ Asset

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Case Stage</b> (Simple)	<b>Client   YJ Case   Assessments Plans and Reviews   Asset   Case Stage</b>	Identifies the client case's current stage when an assessment is completed.	N	N
<b>Plan Intervention Method</b> (Simple)	<b>Client   YJ Case   Assessments Plans and Reviews   Intervention Plan   Target   Method</b>	Identifies the method of delivery of an intervention plan target.	N	N

## YJ Asset Plus

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Assessment Stage</b> (Simple)				
<b>CP Issue</b> (Simple)				
<b>Closed ended Question Respn 1</b> (Simple)				
<b>Closed ended Question Respn 2</b> (Simple)				

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Closed ended Question Respn 4</b> (Simple)				
<b>ETE Provision</b> (Simple)				
<b>ETE Status</b> (Simple)				
<b>Likelihood Of Reoffending</b> (Simple)				
<b>MAPPA Category</b> (Simple)				
<b>MAPPA Level</b> (Simple)				
<b>Marac</b> (Simple)				
<b>Parental Status</b> (Simple)				
<b>Risk Judgment</b> (Simple)				
<b>Safety wellbeing concerns</b> (Simple)				
<b>Scaled Approach Int Level</b> (Simple)				

## YJ Case

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Accommodation Impact</b> (Simple)	<b>Client   Summary   Accommodation Impact</b>	Evaluates the impact clients' accommodation has on their offending behaviour, e.g. Positive, Negative.	N	N
<b>Accommodation Suitable</b> (Simple)	<b>Client   Summary   Accommodation Suitability</b>	Describes if clients' current accommodation is suitable, e.g. Yes, No.	N	N



## Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Accommodation Type</b> (Complex)	<b>Client   Summary   Accommodation Type</b>	Describes clients' current accommodation, e.g. Sofa surfing, hostel.	N	N
<b>Additional Aggravated Circs</b> (Simple)	<b>Client   YJ Case   Offence   Additional Aggravated Circumstances</b>	Indicates any aggravated circumstances related to the offence, e.g. Knife used on school premises; Gang related.	N	N
<b>Additional Worker Role</b> (Simple)	<b>Client   YJ Case   Case Details   Additional Worker</b>	Identifies the role of additional workers, e.g. Volunteer; SM Worker.	N	N
<b>Additional Workers</b> (Complex)	<b>Client   YJ Case   Case Details   Additional Worker</b>	Identifies additional workers, e.g. Daniel Norris.	N	N
<b>Adjourned Information</b> (Simple)	<b>Client   YJ Case   Court Appearances   Adjourned Additional Information</b>	Identifies the reason a court hearing was adjourned, e.g. Arrested on Old Charges; Adjourned for Review of Money Payments.	N	N
<b>Bail Remand Information</b> (Complex)	<b>Client   YJ Case   Court Appearances   Bail/Remand Additional Information</b>	Provides additional information about clients' actual remand status, e.g. Bail Refused - Offence Committed Very Serious; Grounds for Secure - History of Absconding/Offence.	N	N
<b>Breach Decision Reason</b> (Complex)	<b>Client   YJ Case   Events   Breach Decision Reason</b>	Additional information as to why a breach may have been initiated or stayed.	N	N
<b>Case Outcome</b> (Simple)	<b>Client   YJ Case   Case Details   Case Outcome</b>	Identifies the reason a case has been closed, e.g. Moved Away; Deceased.	N	N
<b>Case Role</b> (Simple)	<b>Client   YJ Case   Case Worker   Role</b>	Identifies the role of a case worker linked to a client.	N	N
<b>Case Type</b> (Simple)	<b>Client   YJ Case   Case Details   Case Type</b>	Identifies the type of case, e.g. Active; Inactive.	N	N
<b>Client Relationship Type</b> (Simple)	<b>Client   YJ Case   Gangs and Relationships   Relationship</b>	Identifies the links or relationships between YJ clients, e.g. Ally, Rival.	N	N

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Court</b> (Complex)	<b>Client   YJ Case   Court Appearances   Court</b>  <b>Client   YJ Case   various EYE Documents</b>	Identifies the court at which a client's hearing is taking place.	N	Y
<b>Event Type</b> (Complex)	<b>Client   YJ Case   Events   Type</b>	Identifies the types of events or contacts with which the client is involved, e.g. First Contact; Initiate Breach	Y	Y
<b>Gang Member Type</b> (Simple)	<b>Client   YJ Case   Gangs and Relationships   Membership Type</b>	Identifies position in a gang or relationship to a gang, e.g. Member; Leader.	Y	N
<b>Gang Relationship Type</b> (Complex)	<b>Unseen in system</b>	Determines whether the relationship is categorised as putting clients in alliance or in conflict with each other, e.g. Ally (Alliance), Rival (Conflict).  This is indicated by the colour in which they are displayed in YJ, Conflict = red, Alliance = green.	Y	N
<b>Gangs</b> (Complex)	<b>Client   YJ Case   Gangs and Relationships   Gang</b>	Identifies the name, territory, and relationships of gangs.	N	N
<b>Intervention Programme Outcome</b> (Simple)	<b>Client   YJ Case   Intervention Programme   Outcome</b>	Identifies the outcome of an intervention programme, e.g. Complete; Consecutive.	N	N
<b>Intervention Programme Type</b> (Complex)	<b>Client   YJ Case   Intervention Programme   Type</b>	Identifies the type of intervention programme the client has been handed and can be configured to automatically add prescribed events as part of the programme, e.g. Youth Rehabilitation Order; Reparation Order.  Programme types can be identified as custodial sentences. Clients undergoing custodial interventions are denoted as Currently in Custody in their core record.  Programme types can be identified as preventative interventions. Prevention intervention programmes do not require linking to offences.	N	Y

Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Interview Outcome</b> (Simple)	<b>Client   YJ Case   Pre-Court Decisions and Interviews   Pre-Court Interview   Interview Outcome</b>	Identifies the outcome of a pre-court interview	N	N
<b>Interview Type</b> (Simple)		Identifies the type of interview the client attended.		
<b>Legal Representative</b> (Complex)	<b>Client   YJ Case   Court Appearances   Legal Representative</b>  <b>Client   YJ Case   various EYE Documents</b>	Displays the Legal Representative present at court.  <i><b>NOTE: These can also be added via the web application.</b></i>	N	N
<b>Legal Representative Role</b> (Simple)	<b>Client   YJ Case   Court Appearances   Legal Representative</b>  <b>Client   YJ Case   various EYE Documents</b>	Displays the role of the Legal Representative present at court.  <i><b>NOTE: These can also be added via the web application.</b></i>	N	N
<b>Magistrate</b> (Complex)	<b>Client   YJ Case   Court Appearances   Magistrate</b>  <b>Client   YJ Case   various EYE Documents</b>	Displays the name of the court personnel in attendance at a hearing.  <i><b>NOTE: These can also be added via the web application.</b></i>	N	N
<b>Magistrate Role</b> (Simple)	<b>Client   YJ Case   Court Appearances   Magistrate</b>  <b>Client   YJ Case   various EYE Documents</b>	Displays the role of the attending member of court personnel at a hearing, e.g. Magistrate; Justice's Clerk.  <i><b>NOTE: These can also be added via the web application.</b></i>	Y	N
<b>Offence Outcome</b> (Complex)	<b>Client   YJ Case   Court Appearances   Offences   Outcome</b>  <b>Client   YJ Case   Offences   Latest Outcome</b>  <b>Client   YJ Case   various EYE Documents</b>	Identifies the court's outcome for an offence.	Y	Y

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Offence Plea</b> (Simple)	<b>Client   YJ Case   Court Appearances   Offence   Plea</b>  <b>Client   YJ Case   various EYE Documents</b>	Identifies the client's plea to the offences heard in court, e.g. Guilty; Not Guilty.	N	N
<b>Offence Type</b>		For more information, see <a href="#">Offence Types and YOGRS</a> on page 88.		
<b>Other Additional Information</b> (Simple)	<b>Client   YJ Case   Court Appearance   Other Additional Information</b>	Shows additional information for when a court appearance is concluded with the action of 'Other', e.g. Trial Collapsed.	N	N
<b>Parental Responsibility</b> (Simple)	<b>Client   YJ Case   Summary   Address Details   Parental Responsibility</b>  <b>Client   Summary   Current Address Details   Parental Responsibility</b>	Identifies parental responsibilities of people at clients' current addresses, e.g. Birth Mother; Adoptive Parents.	N	N
<b>Parenting Activity Type</b> (Simple)	<b>Client   YJ Case   Parenting Intervention   Activities</b>	Identifies the activities linked to a Parenting Intervention.	N	N
<b>Parenting Intervention Outcome</b> (Simple)	<b>Client   YJ Case   Parenting Intervention   Outcome</b>	Identifies the outcome of a Parenting Intervention.	N	N
<b>Parenting Intervention Type</b> (Complex)	<b>Client   YJ Case   Parenting Intervention   Type</b>	Identifies the nature of the parenting intervention, e.g. Voluntary Parenting Programme, Parenting Order.	N	N
<b>Pre Court - Issued By</b> (Simple)	<b>Client   YJ Case   Pre Court Decisions   Issued By</b>	Identifies the type of person issuing the pre-court decision, e.g. Custody Officer.	N	N
<b>Pre Court Decision Type</b> (Simple)	<b>Client   YJ Case   Pre Court Decisions   Type</b>	Identifies the type of pre-court decision, e.g. Charged; Not Charged.	N	N
<b>RJ Intervention Type</b> (Complex)	<b>Client   YJ Case   Victim   RJ Intervention Types</b>	Identifies the nature of restorative justice offered to victims, e.g. Letter of Apology, Mediation.	N	Y
<b>Referral Category</b> (Simple)	<b>Client   YJ Case   Referral   Category</b>	Identifies the category of a referral, e.g. Positive Activities, Notification.	N	N

## Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Referral Outcome</b> (Simple)	<b>Client   YJ Case   Notifications   Outcome</b>	Identifies the outcome of any notifications, e.g. Case Opened, Deceased.	N	N
<b>Referral Source</b> (Simple)	<b>Client   YJ Case   Notifications   Notification Source</b>	Identifies the source of the notification, e.g. Police, Court.	N	N
<b>Referral Stage</b> (Simple)	<b>Client   YJ Case   Referral   Referral Stage   Stage</b>	Identifies the current stage of referrals, e.g. Accepted, Being Assessed.	N	N
<b>Report Type</b> (Simple)	<b>Client   YJ Case   Court Appearances   Report Request   Report Type</b>	Identifies the type of report a court has requested, e.g. Parenting Order Assessment; Action Plan Order Assessment	N	N
<b>Review Outcome</b> (Simple)	<b>Client   YJ Case   Case Details   Case Review   Outcome</b>	Identifies the outcome of a case review, e.g. Completed; Outstanding.	N	N
<b>Sentenced Information</b> (Simple)	<b>Client   YJ Case   Court Appearances   Sentenced Additional Information</b>	Provides additional information for concluded court appearances resulting in a Sentenced action, e.g. Appeal Against Sentence, Verdict Reached.	N	N
<b>Situation Impact</b> (Simple)	<b>Client   Summary   Current Situation   Impact</b>  <b>Client   Situation   Impact</b>	Describes the impact clients' current situations are likely to have on their offending behaviour, e.g. Add To Behaviour, Positive, Negative	N	N
<b>Substantive Outcome Req Type</b> (Complex)	<b>Client   YJ Case   Court Appearances   Offences   Outcome</b>  <b>Client   YJ Case   Offences   Latest Outcome</b>  <b>Client   YJ Case   various EYE Documents</b>	Identifies the courts' outcomes following sentencing, e.g. Unpaid Work, Drug Testing	Y	Y

## Youth Service

**NOTE:** You need a Youth Service license code to access this area.

Lookup	Address	Further Information	System?	Used for Mapping?
<b>Challenging Discrimination</b> (Simple)	<b>YS Session   Curriculum, Activities and Issues   Challenging Discrimination and Prejudice</b>  <b>YS Opportunity   Detached / Outreach Session   Challenging Discrimination and Prejudice</b>	Identifies the areas of discrimination to be challenged during YS sessions, e.g. Age, Race, Gender.	N	N
<b>YS Funding</b> (Simple)	<b>Opportunity   Summary   'Funding Partnership'</b>	Identifies funding source or partnership of personal development opportunities.	N	N
<b>YS Session Achievement Type</b> (Complex)	<b>Client   Qualifications and Achievements   Achievements and Positive Activities   Achievement</b>	Records client achievements, e.g. accredited achievements, session learning outcomes.	N	N
<b>YS Session Activity</b> (Simple)	<b>YS Session   Curriculum, Activities and Issues   Activities</b>	Identifies activities covered during YS sessions, e.g. Social Education Programme, PSHE.	N	N
<b>YS Session Curriculum</b> (Complex)	<b>YS Session   Curriculum, Activities and Issues   Curriculum Area</b>  <b>YS Opportunity   Detached / Outreach Session   Curriculum Area</b>	Identifies the curriculum area being addressed at the YS session, e.g. Enjoy and Achieve, Be Healthy.  For more information, see <a href="#">YS Session Curriculum</a> on page 83.	N	N
<b>YS Session Curriculum Sub Area</b> (Simple)	<b>YS Session   Curriculum, Activities and Issues   Curriculum Area</b>  <b>YS Opportunity   Detached / Outreach Session   Curriculum Area</b>	Identifies which part of the curriculum area is being addressed at the YS session, e.g. Diet, Exercise, Harm Reduction.	N	N

Appendix 2: Lookup Tables

Lookup	Address	Further Information	System?	Used for Mapping?
<b>YS Session Evaluation</b> (Simple)	<b>YS Session   Evaluation   Young Persons Evaluation of Session</b>  <b>YS Session   Evaluation   Overall Evaluation of Session</b>	Gives the YS session a quality rating, e.g. Good, Very Good, Weak.	N	N
<b>YS Session Level of Contact</b> (Simple)	<b>YS Opportunity   Detached / Outreach Session   Level of Contact</b>	Establishes the level of contact with clients in detached and outreach sessions, e.g. Observation, Conversation, Intervention.	N	N
<b>YS Session Staff</b> (Complex)	<b>YS Session   Summary   Staff Attending</b>  <b>YS Opportunity   Detached / Outreach Session   Staff Attending</b>	Identifies staff in attendance at YS sessions. Can be filtered by Locality  For more information, see <a href="#">YS Session Staff</a> on page 84.	N	N

# 27 | Appendix 3: Security Permissions

## Security Group Permissions

### Admin / Manager

Permission	Explanation
<b>Admin / Manager</b>	Selecting this check box selects all security attributes in this section.
<b>Assign YJ Users to Manager</b>	This enables managers to assign their users.
<b>Client Caseload Points Change</b>	This enables users to alter the standard caseload points for a client. Managers can allocate more points to clients requiring intensive support to ensure an even distribution of caseloads among workers.
<b>Change Client Type</b>	This enables the converting of young person records into adult records. This feature is not used in One IYSS and should not be needed.
<b>Change User Security Details</b>	This enables users to unlock and change the passwords and memorable words for other accounts without having full system administration permissions. Also enables the unlocking of locked client, provider and opportunity records in the One IYSS web application.
<b>Cohort Management</b>	This grants access to the <b>Cohort Management</b> screen, enabling users to review the makeup of the cohort from an aggregated to an individual level view.
<b>Create Shared Search</b>	This enables users to create searches for distribution.
<b>Grant Full Access</b>	This grants full access to relevant client details.
<b>Inters - Add Basic</b>	This enables users to create and change Basic Interactions.
<b>View My Caseload Tools</b>	This grants access to the caseload management facilities for a user's own caseload. It enables users to review the makeup of the caseload from an aggregated or an individual level view.
<b>Team Manager</b>	This grants Team Manager permissions, enabling allocation of staff and entering supervision notes to client records.
<b>Templates and Paras</b>	No longer used.
<b>YJ Case Manager Tool</b>	
<b>Youth Service MI Reports</b>	This enables users to access and run Youth Service Management Information reports.  <i><b>NOTE:</b> These reports can be resource-intensive. Users should be made aware of this.</i>

### Client Add/Change/Delete

You can control how individual users interact with client records in the **Client Add/Change/Delete** section by granting three independent levels of access on all permissions with one of the following suffixes:

- Add - This enables users to add new data to a client record.



### Appendix 3: Security Permissions

- Change - This enables users to change the data in a given section of a client record.
- Delete - This enables users to delete data from a given section of client records.

The permissions without these suffixes are explained in the following table:

Permission	Explanation
Client - Change Hold YPI	Enables control over information shared with Connexions.
IYSS Client Convert - Simple	Enables users to convert One records to One IYSS records using the Simple method.
IYSS Client Convert Standard	Enables users to convert One records to IYSS records.
Personal and Family Contacts - Link Siblings	This function is not used in One IYSS.
Interactions - New	Enables users to create new client interactions.
Professional Contacts - Link to Agency	Enables users to link client records to agencies also involved with the client.
Professional Contacts - Referral to Agency	Enables users to display an agency referral within the client record.
Plan/Review - View	Enables users to view plans and reviews.
Referral - Change Outcome / Conclusion	This enables users to end referrals in the <b>Professional Contacts</b> section of the client record. It also grants access to the <b>Referrals Awaiting and Outcome</b> portal on <b>my homepage</b> .
Summary - Change - Practitioner	Read only. Enables users to view client name, date of birth and gender in the <b>Client Summary</b> panel.  Users are assigned this permission by default. To enable users to change these details, assign them the Summary - Change - Sys Admin permission.
Summary - Change - Sys Admin	Read-write. Enables users to edit client name, date of birth and gender in the <b>Client Summary</b> panel.
Update Inactive/Deceased Person Details	Displays links in the <b>Actions</b> panel to <b>Set Student to Inactive/Deceased</b> .

## Client Bulk Updates

Permission	Explanation
<b>NOTE:</b> There is no undo function in One IYSS. All bulk updates are irreversible.	
Client Bulk Updates	Selecting this check box selects all security attributes in this section.
Bulk Update - Lead Worker	This enables users to mass-update clients' Lead Workers.
Bulk Update - Actively Seeking Flag	This enables users to mass-update clients' Actively Seeking status.
Bulk Update - Actual Qualification Level	This enables users to mass-update clients' Actual Qualification Level.
Bulk Update - Attributes	This enables users to mass-update clients' Attributes.
Bulk Update - Base Line Status	This enables users to mass-update clients' Base Line Status.

Permission	Explanation
<b>Bulk Update - Assign Caseload Type</b>	This enables users to mass-update clients' Caseload Types.
<b>Client Bulk Update - Inactive</b>	Enables users to make groups of client records active or inactive.
<b>Bulk Update - Consent</b>	This enables users to mass-update and specify limits of clients' data protection consent information.
<b>Bulk update - Situation Currency</b>	This enables users to mass-update clients' current situations.
<b>Bulk Update - Individual Circumstances</b>	This enables users to mass-update clients' Individual Circumstances, including adding new and editing existing circumstances.
<b>Bulk Update - Interactions</b>	This enables users to mass-update client interactions.
<b>Bulk Update - Level of Need</b>	This enables users to mass-update clients' levels of need.
<b>Bulk update - Send Message</b>	This enables users to send batches of emails or text messages to clients.
<b>Bulk Update - Situations</b>	This enables users to mass-update clients' Situations.
<b>Bulk Update - Submissions</b>	This enables users to mass-update Submissions.
<b>Bulk Update - Team/Centre</b>	This enables users to mass-update clients' Managing Team or Centre.
<b>Bulk Update - Assign Yr11 Intended Destination</b>	This enables users to mass-update clients' intended destination at yr11.
<b>BU - YJ Events</b>	
<b>Bulk Update - Client</b>	Controls access to <b>Bulk Updates</b> screen.
<b>Create Saved List</b>	Enables users to create a group of clients and save them as a list accessible from the <b>My Saved Client Lists</b> portal.
<b>Create Shared Saved List</b>	Enables users to share <b>Saved Lists</b> with other users.
<b>Upload Client List</b>	Enables users to upload clients lists, based on unique numeric IDs, in .csv or .xls form. These lists can then be saved the same as a regular saved list.

## Client Functionality

Permission	Explanation
<b>Client Functionality</b>	Selecting this check box selects all security attributes in this section.
<b>Add Appointment Link</b>	This enables a user to create an appointment from the Actions panel.
<b>Add Client Request Link</b>	This enables a user to create a basic client record and submit it for approval. Users with a Process Request permission will be notified and can accept or reject the record. The record will not be active until approved.
<b>Change Client Request Link</b>	This enables users with read-only rights to report inaccuracies or updates. Users with Process Request permission will be notified and can action the changes.

Permission	Explanation
Child in Danger Link	This enables access to the <b>Child in Danger</b> screen.
Client Search	This enables user access to client search functions to be controlled.
Client Add Simple (net)	This enables user to access a simplified version of the add client process, whereby the system creates a current statutory education situation based on DOB, and populates the <b>Team</b> and <b>Centre</b> fields based on the user's details.
Client Add Standard (net)	This enables the user to add a young person's record.
Client Alert - Change	
Client Change (net)	Controls access to all <b>Change Client</b> screens.
Client View (net)	Grants access to client records.
Group Session - Add	Enables users to add group sessions.
Key Clients Links	Enables users to add and remove clients from their <b>Key Clients</b> lists.
Send Message Link	Enables user to send messages from with a client record, providing a mobile telephone number or email address are on record.
Set Client Inactive Request	Enables user to archive entire client records.
Set Client Inactive	Enables user to send delete record requests. Users with <b>Process Request</b> permission will be notified and can delete the record if the request is approved.
Show Has CAF Indicator	This displays the following flag in the header of all clients for whom the <b>Case Details</b> field <b>Subject to CAF</b> is set to 'Current':  <div style="background-color: #e0e0e0; padding: 2px; display: inline-block;"><b>! Has CAF</b></div> A TYS module licence is required for this function.
Show On Child Protection Register Indicator	This displays the following flag in the header of all clients for whom the <b>Case Details</b> field <b>On Child Protection Register</b> is set to 'Current':  <div style="background-color: #e0e0e0; padding: 2px; display: inline-block;"><b>! On Child Protection Register</b></div> A TYS module licence is required for this function.

## Client Search Criteria

Permission	Explanation
Client Search Criteria	Selecting this check box selects all security attributes in this section.
Additional Needs Section	This enables users to enter selection criteria for client searches in the <b>Additional Needs</b> section.
Aspirations & Qualification Section	This enables users to enter selection criteria for client searches in the <b>Aspirations &amp; Qualification</b> section.
Basic Section	This enables users to enter selection criteria for client searches in the basic (personal information) section.
Caseload Section	This enables users to enter selection criteria for client searches in the <b>Caseload</b> section.

Permission	Explanation
<b>Client Search - Baselines Section</b>	This enables users to enter selection criteria for client searches in the <b>Baselines</b> section.
<b>Client Search - Individual Circumstances</b>	This enables users to enter selection criteria for client searches in the <b>Individual Circumstances</b> section.
<b>General Section</b>	This enables users to enter selection criteria for client searches in the <b>General</b> section.
<b>Inactive Clients</b>	This enables users to enter selection criteria for client searches in the <b>Inactive Clients</b> section.
<b>Location Section</b>	This enables users to enter selection criteria for client searches in the <b>Location</b> section.
<b>Client Search - Occupational Areas Section</b>	This enables users to enter selection criteria for client searches in the <b>Occupational Areas</b> section.
<b>Situations Section</b>	This enables users to enter selection criteria for client searches in the <b>Situations</b> section.
<b>Search Inactive People</b>	This displays the <b>IYSS Records (Person Inactive)</b> check box in the basic section of client searches.
<b>TYS - Client Search Criteria</b>	If you have a TYS module licence, this grants users access to the <b>Targeted Youth Support</b> section in client search.
<b>View Guarantee Detail</b>	This enables the displayed search results to incorporate information specifically related to guarantee work. It reduces the need to move in and out of client records by displaying more information in the results.
<b>View Guarantee Summary</b>	This enables the displayed search results to incorporate information specifically related to guarantee work. It reduces the need to move in and out of client records by displaying more information in the results.
<b>With Contact Section</b>	This enables users to enter selection criteria for client searches in the <b>With Contact</b> section.
<b>YJ - Client Search</b>	
<b>YJ - Data Checking</b>	
<b>Client and Search - YS Sessions Section</b>	This displays the <b>YS Sessions</b> section in client records and enables users to enter selection criteria for client searches within the section.

## Client View Sections

You can configure the sections of a client record that can be viewed and expanded by assigning permissions with the following suffixes:

- **More:** Users can expand the relevant section of a client record by clicking the **More** button.
- **Visible:** Users can view the relevant section of a client record.

## ContactPoint

You can control how individual users interact with client records in the **ContactPoint** section by granting three independent levels of access on all permissions with one of the following suffixes:

- **Visible:** users can view basic information contained in the relevant section.

- More: users can expand the relevant section to view hidden information.
- Change: users can update information held in the relevant section.

## My Aspire Sections

The security attributes contained within this section dictate the sections that are displayed within a user's **my homepage** page. Select the attributes appropriate for the security group, based on the other security permissions they hold, e.g. if users are allowed to identify client records as key clients, the **Key Client** attribute must be selected to display the **Key Clients** list.

**NOTE:** The My Assets permission is not needed following the deactivation of Asset and move to AssetPlus.

## Opportunity

Permission	Explanation
<b>Opportunity</b>	Selecting this check box selects all security attributes in this section.
<b>Opportunity - Change Provider</b>	This enables users to change the provider record linked to an opportunity.
<b>Delete YS Session</b>	This enables users to delete Youth Service session records.
<b>Opportunity - Add</b>	This enables users to add new opportunities to the system.
<b>Opportunity - Change</b>	This enables users to change information in opportunities.
<b>PDA View</b>	This enables users to view opportunities as they appear on a Personal Digital Assistant (PDA).
<b>Personal Development</b>	This enables users to maintain personal development opportunities.
<b>Record YS Detached Sessions</b>	This enables users to create youth service detached sessions linked to youth service activities.
<b>Record YS Sexual Health Session</b>	This enables users to create youth service sexual health sessions linked to youth service activities.
<b>Record YS Session</b>	This enables users to create youth service sessions linked to youth service activities.
<b>Set Opportunity Inactive</b>	This enables users to delete (archive) opportunities. It is important to recognise that deleting opportunity records will affect provider and clients records linked to the opportunity. Users must understand these implications.
<b>View YS Sexual Health Session</b>	This enables users to view youth service sexual health sessions linked to youth service activities.
<b>Record YS Activity and Session Types</b>	This enables users to create youth service activities and define the sessions run from them.

## Provider

Permission	Explanation
<b>Provider</b>	Selecting this check box selects all security attributes in this section.
<b>Provider Contacts - Agency</b>	This enables users to maintain agency contacts.

Permission	Explanation
Provider Contacts - Employer	This enables users to maintain employer contacts.
Provider Contacts - FE Provider	This enables users to maintain further education provider contacts.
Provider Contacts - HE Provider	This enables users to maintain higher education provider contacts.
Provider Contacts - Other	This enables users to maintain other contacts.
Provider Contacts - PD	This enables users to maintain personal development contacts.
Provider Contacts - School	This enables users to maintain school contacts.
Provider Contacts - Training Provider	This enables users to maintain training provider contacts.
Provider Contacts - YOI	This enables users to maintain young offender institute contacts.
Prov/Opp View	

## Provider Add/Change/Delete

Permission	Explanation
Provider Add/Change/Delete	Selecting this check box selects all security attributes in this section.
Provider - Delete Contact	This enables users to delete named contact details from provider records.
Provider Change EBP	This enables users to change Education Business Partnership data for provider records.
Prov change Linked Clients	This enables users to change clients linked as Employed in provider records.
Prov/Opp (.net) Change Health and Safety	This enables users to control health and safety data in Opportunity, Change H&S Info and PDA details on providers
Provider - Add	This enables user to add new provider records.
Provider - Change	This enables user to change provider records.
Set Provider Inactive	This enables user to delete (archive) provider records. It is important to recognise that deleting provider records will affect opportunity and clients records linked to the provider. Users must understand these implications.

## Substance Misuse

Permission	Explanation
Substance Misuse	Selecting this check box selects all security attributes in this section.
Substance Misuse - Client Search Criteria	Grants users permission to access the <b>Substance Misuse</b> section in the <b>Client Search</b> screen.
Substance Misuse -DX	This enables users to produce NDTMS data extracts.
Substance Misuse Client Sections - More	Activates the <b>More</b> button in substance misuse sections of client records.

Permission	Explanation
<b>Substance Misuse Client Sections - Visible</b>	Displays substance misuse sections of client records.

## Substance Misuse Change

You can control how individual users interact with client records in the **Substance Misuse** section by granting three independent levels of access on all permissions with one of the following suffixes:

- Add - This enables users to add new data to a client record.
- Change - This enables users to change the data in a given section of a client record.
- Delete - This enables users to delete data from a given section of client records.

## TYS Sections

You can control how individual users interact with client records in the TYS sections (**Crime Prevention, Other** and **Teenage Pregnancy**) by granting independent levels of access on all permissions. These are indicated by the suffix in the permission name.

Users working across multiple services will only be able to add referrals if they are logged in with the appropriate TYS section, noted previously.

Client permissions are configured using the following suffixes:

- Visible. This determines whether users can view the client.
- More. This determines whether users can access hidden information.

All other permissions are configured using the following suffixes:

- Add. This enables users to add new records.
- Change. This enables users to change the information held in records.
- Delete. This enables users to delete records.

Case permissions include a Close suffix, which enables users to mark the case as closed.

## Windows

Permission	Explanation
<b>Windows</b>	Selecting this check box selects all security attributes in this section.
<b>Check Stats Status</b>	This enables users to identify the status of statistical processing jobs and records awaiting processing by displaying the <b>Statistical Output Status</b> panel.
<b>DX</b>	Grants access to the <b>DX Monitoring</b> tool enabling data import and monitoring of data export jobs.
<b>DX - Submit</b>	This enables user to submit data export jobs to the <b>DX Monitoring</b> tool.
<b>Statistical Reporting Tool</b>	Grants users access to the <b>Statistical Reporting</b> tool enabling them to examine and amend the monthly NCCIS XML return. The tool is accessed through the <b>IYSS Links</b> panel on <b>my homepage</b> in the IYSS web application.

Permission	Explanation
System Admin	Grants users access to the One IYSS System Administration Client. <b>NOTE:</b> As this gives permission to add, amend, or delete all system administration configurations, it should only be granted to One IYSS System Administrators who have responsibility for and understanding of system maintenance.

## YJ AssetPlus

Permission	Explanation
YJ Asset Plus-Admin	Enables users to mandate non-YJB-controlled fields within AssetPlus.
YJ Case-AssetPlus-View Audit	Grants users access to the AssetPlus audit.
YJ Case-AssetPlus Stage-Sign	Enables users to sign off stages.
YJ Case-AssetPlus-View	Grants users access to the <b>AssetPlus</b> section of a Youth Justice case record.
YJ Case-AssetPlus Stage-Cancel	Enables users to cancel (delete) stages.
YJ Case-AssetPlus Stage-Change	Enables users to change stages.
YJ Case-AssetPlus Stage-Open	Enables users to open an AssetPlus stage (the <b>new</b> button in the <b>AssetPlus Stages</b> panel is only displayed to users with this permission).
YJ Case-AssetPlus Stage-Proxy	Enables users to edit or create stages for other users. Stages are owned by the creating user. If this user is a proxy user, an owner must be selected during creation.
YJ Case-AssetPlus Stage-Stop	Enables users to stop a stage.

## YJ Case Transfer

Permission	Explanation
YJ Accept Reject Caretaking Updates	DO NOT INVOKE UNTIL CASE TRANSFERS LIVE
YJ Accept Reject Initial Transfer Request	DO NOT INVOKE UNTIL CASE TRANSFERS LIVE
YJ All Case Transfer Notifications	DO NOT INVOKE UNTIL CASE TRANSFERS LIVE
YJ Case Transfer Admin	DO NOT INVOKE UNTIL CASE TRANSFERS LIVE
YJ Initiate Transfer	DO NOT INVOKE UNTIL CASE TRANSFERS LIVE
YJ My case Transfer Notifications	DO NOT INVOKE UNTIL CASE TRANSFERS LIVE



## Youth Justice

Permission	Explanation
<b>Youth Justice</b>	Selecting this check box selects all security attributes in this section.
<b>YJ - Add Report Request</b>	
<b>YJ - Allocate Report Request</b>	
<b>YJ Assessment - Countersign</b>	
<b>YJ Case - Case Worker - Delete</b>	
<b>YJ - Change Report Request</b>	
<b>YJ Case - Court Appearance - Delete</b>	
<b>YJ - Delete Report Request</b>	
<b>YJ Case - Event - Delete</b>	
<b>YJ - IV Plan Target - Delete</b>	
<b>YJ Case - Intervention Programme - Delete</b>	
<b>Messaging Administrator</b>	
<b>YJ Case - Offence - Delete</b>	
<b>YJ Plan - Countersign</b>	This permission is not needed following the deactivation of Asset.
<b>YJ Case - Pre Court Decision - Delete</b>	
<b>YJ Case - Pre Court Interview - Delete</b>	
<b>YJ Plan Review - Countersign</b>	This permission is not needed following the deactivation of Asset.
<b>YJ - EYE Submission</b>	
<b>YJ Assessment - Add</b>	This permission is not needed following the deactivation of Asset.
<b>YJ Assessment - Change</b>	This permission is not needed following the deactivation of Asset.
<b>YJ Assessment - Delete</b>	This permission is not needed following the deactivation of Asset.
<b>YJ Assessment - Save As</b>	This permission is not needed following the deactivation of Asset.
<b>YJ Assessment - Unlock</b>	This permission is not needed following the deactivation of Asset.
<b>YJ Assessment - Change Author</b>	This permission is not needed following the deactivation of Asset.
<b>YJ Assessment - Change Editors</b>	This permission is not needed following the deactivation of Asset.
<b>YJ Case - Add / Open</b>	
<b>YJ Case - Add Gang</b>	

Permission	Explanation
YJ Case - Change	
YJ Case - Close	
YJ Case - Delete	
YJ Case - Override FTC Count	
YJ Case - View client Context	
YJ Case - Review	
YJ Case - Victim	This enables users to view all victim information, including the victim summary pop-up dialog with notes.
YJ Case - View Victim Summary	This restricts users to the victim summary dialog, with no notes. The victim cannot be identified from the information displayed.  <i><b>NOTE:</b> Where no victim permissions are assigned, users can only view the <b>Type</b> (person, organisation, etc.), whether RJ was offered, accepted, and the intervention type, and the <b>Offences</b> against the victim.</i>
YJ Case - Authorise Breach Process	
YJ Case - Initiate Breach Process	
YJ Case - Lock / Unlock	Enables users to lock or unlock YJ cases.
YJ Case - Interventions Ending	
YJ Case - Parent Carer	
YJ Case - Parenting Interventions	
YJ Case View - Parenting Section	
YJ Case - Referrals Received	
YJ Case - Unallocated Victims	
YJ Case - Unallocated Parenting Interventions	
YJ Case / Notification View	
YJ Client Sections - More	
YJ Client Sections - Visible	
YJ Client Change	
YJ Client Situation Change Hours	
YJ EYE Submission - Admin	
YJ Notification - Add / Open	
YJ Notification - Change	

Permission	Explanation
YJ Notification - Delete	
YJ Plan - Add	This permission is not needed following the deactivation of Asset.
YJ Plan - Change	This permission is not needed following the deactivation of Asset.
YJ Plan - Delete	This permission is not needed following the deactivation of Asset.
YJ Plan - Save As	This permission is not needed following the deactivation of Asset.
YJ Plan - Unlock	This permission is not needed following the deactivation of Asset.
YJ Case Referral - Delete	This permission is not needed following the deactivation of Asset.
YJ Plan Review - Add	This permission is not needed following the deactivation of Asset.
YJ Plan Review - Change	This permission is not needed following the deactivation of Asset.
YJ Plan Review - Delete	This permission is not needed following the deactivation of Asset.
YJ Plan Review - Save As	This permission is not needed following the deactivation of Asset.
YJ Plan Review - Unlock	This permission is not needed following the deactivation of Asset.
YJ Case-ASB Incident	Enables users to record new anti-social behaviour incidents (the <b>new</b> button in the <b>ASB Incidents</b> panel is only displayed to users with this permission).

## Report Permissions

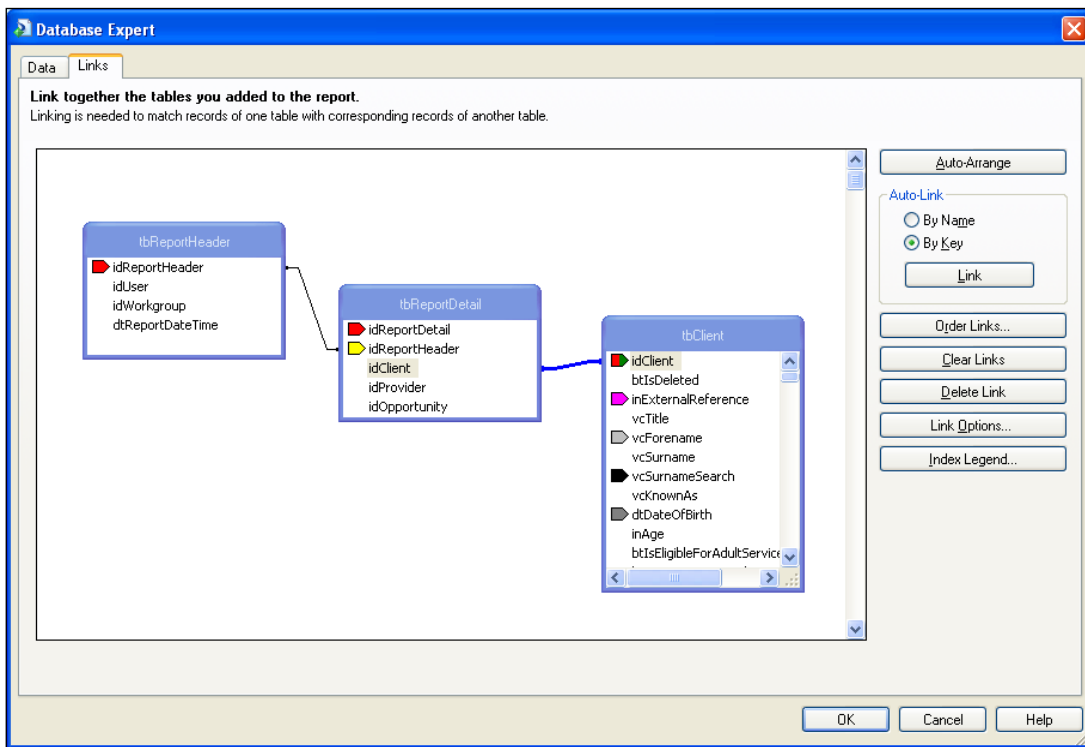
Crystal Reports produce a number of templates, mass mail merge documents and reports available in One IYSS. Reports can be selected here for inclusion in the security group permissions. These are accessed by clicking the **View Reports** hyperlink in the **IYSS Links** panel of **my homepage**, or through client, opportunity or provider searches.

The options here can be configured in the **Function** area of the One IYSS System Administration Client. The location in which the report is displayed depends on how it is configured.

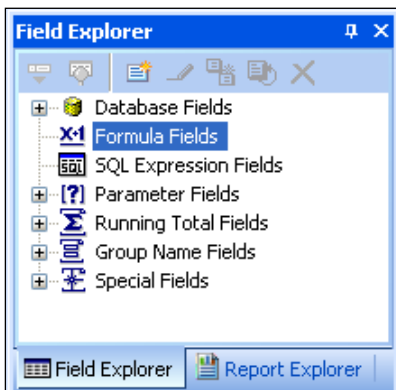
# 28 | Appendix 4: Creating a Report Template for use through Searches

To use a report from **Find Clients | Opportunities | Providers** the reports need particular tables and formulae. Below are the steps to creating a skeleton report which you can use as a template.

1. Select two tables - *tbreportheader* and *tbreportdetail* and the *tbclient/tbprovider/tbopportunity* depending on the type of report you are creating.
2. Link:
  - a. *tbreportdetail* table to the *tbclient* using *idclient*, and
  - b. *tbreportheader* to *tbreportdetail* using *idreportheader* as below:



3. Click the **OK** button to return to the **Design** screen.
4. From the **Field Explorer** window, click **Formula Fields**:

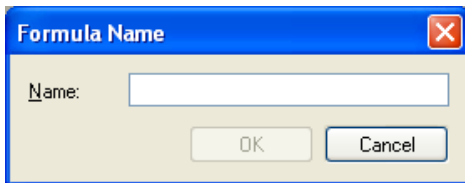


**Appendix 4: Creating a Report Template for use through Searches**


5. Click the **New** button and type or paste in the formula name below and click the **OK** button.

**NOTE:** each is a separate new formula:

- APPLICATION\_NAME
- COMPANY\_NAME
- PRINTED\_ON\_DATE\_TIME
- REPORT\_TITLE
- REPORTHEADERID
- USER\_NAME
- USER\_NAME\_DISPLAY



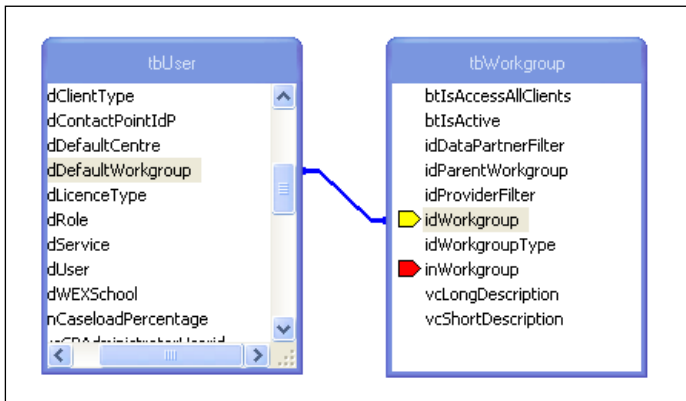
Each time you add a new formula you will be taken into **Formula Editor**.

6. **Save** and **Close**. Do not enter any formula.
7. Click **New** until all formulas are added then click **Report**.
8. Choose **Report, Selection Formulas, record**.
9. Open tbreportheader.
10. Double-click idreportheader and type space = space.
11. Double-click **Formula** field 
- The formula should now read: {tbReportHeader.idReportHeader} = HH{@REPORTHEADERIDHH}
12. Save and close **Formula Editor**. Save and close the report.

# 29 | Appendix 5: Creating a Report that filters by Workgroup

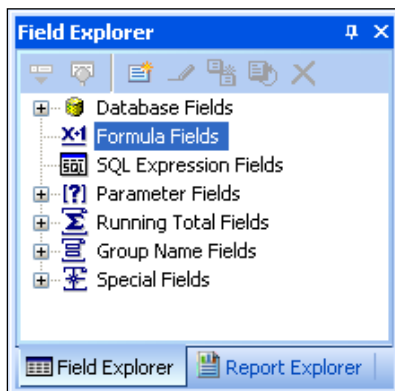
It is possible to create a Crystal Report to filter the data returned by the executing users default workgroup. To do this:

1. Select two tables to be included in your report *tbUser* and *tbWorkgroup*.
2. Link the tables together using *tbUser.idDefaultWorkgroup* to *tbWorkgroup.idWorkgroup* as below:



**NOTE:** You can add other tables as required. *tbWorkgroup* must also be linked to other tables for the filter to work, for example *tbClient.idManagingWorkgroup*.

3. From the **Field Explorer** window, click **Formula Fields**:



4. Click **New** and type in the formula name **USERID**
5. Click the **OK** button.
6. **Save** and **Close**. Do not enter any formula.
7. Choose **Report | Selection Formulas | Record** from the menu bar.
8. Open *tbUser*.
9. Double-click **idUser** and type `space = space`.
10. Double-click **Formula** field `USERID`
11. The formula should now read: `{tbUser.idUser} = HH{@USERIDHH}`
12. Save and close **Formula Editor**. Save and close the report.

*Appendix 5: Creating a Report that filters by Workgroup*


13. Add the report to the system. Ensure that when adding the report that the **Filter by Workgroup** option is ticked.

# 30 | Appendix 6: V4 Client Permissions

Certain functions and actions in IYSS rely on permissions configured within One v4 in addition to their associated permissions held within the One Youth suite.

Permissions in the **User Group Permissions Editor** can be set to Permit Run or Deny Run:

 *Permit Run icon*

 *Deny Run icon*

Permissions in the **User Group Processes Editor** can be set to Read, Read-Write, Read-Write-Delete or Deny.

IYSS Action	v4 Client Permission	Required Setting
Accessing <b>New</b> and <b>Change</b> client options	In <b>User Group Permissions Editor</b> : <b>System Map   All Secured Services   Student   Save Student Details</b>	Permit Run
Accessing linked documents	In <b>User Group Processes Editor</b> : <b>Main Business Processes   Administration   Linked Documents</b>	Read, Read-Write or Read-Write-Delete as appropriate.
Adding interactions to a provider	In <b>User Group Processes Editor</b> : <b>Main Business Processes   Base Administration   Bases</b>	Read-Write or Read-Write-Delete as appropriate
Accessing Key Providers	In <b>User Group Permissions Editor</b> : <b>System Map   All Secured Services   MaintainBase   Save Base (RichClient)</b>  <i><b>NOTE:</b> Users must also have the Provider <b>Add/Change/Delete</b>   <b>Provider - Change</b> permission granted in IYSS</i>	Permit Run







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