

Remote Training Catalogue

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01 | Introduction

Capita appreciate that it is not always possible to bring staff together into the same room at the same time in order to receive training. To enable you to provide continual professional development to your colleagues, Capita have devised a range of remote training courses to enable you to receive training flexibly, cost effectively and from a location suitable to you.

Each session costs £450 for up to 4 delegates and can be arranged by calling your account manager.

02 | Benefits



Delivered at a time that is right for you in easy to accommodate bite sized sessions



Delivered remotely to your workstation, wherever you are



Interactive delivery enabling you to ask questions and share screen



Industry expert lead, to ensure both product knowledge and best practice can be imparted



Cost savings when compared to on-site training sessions



Flexible, if you cannot find the course you want, request an Ask the Expert session

03 | Pre-Requisites



Access to collaborative remote working technologies such as Webex or MS Teams. Capita have a range of remote working tools available and will agree with you what will be used to deliver the session, depending on what you are able to access.



A speaker or headphones to enable you to hear the trainer. If you do not have either of these available, it will be possible to dial into the session using a phone.



A microphone to enable you interact with the trainer. If you do not have a mic available, it will be possible to dial into the session using a phone.

04 | Admissions and Transfers

Reporting on Admissions (Better Letters with Crystal)

Intended for:

Report Writers for One Admissions

Session length: 2 – 3 hours

Outline:

Using the example of Admissions Offer letters, but with techniques which can be used when reporting on any module or database, this session will cover conditional paragraphing in Crystal, showing report writers how to make reports and letters intelligently change their wording depending on the child's circumstances. Using techniques covered in the course, delegates will be able to consolidate multiple letter reports into one report, meaning that any changes to the letter's wording in future years only needs to be done once, and not multiple times across several letters.

The course will also show techniques designed to minimise common annual changes – e.g. updating dates throughout the report and how to avoid prompting users for some parameters every time they run a report.

What will be included:

- How to make a Crystal report change its output based on conditions within the data e.g. how to display a different paragraph, depending on whether a child has been allocated their first or second preference
 - This will include complicated conditions dependent on more than one record e.g. a child who has not been allocated any one of their first three preferences but does/does not have an alternative offer of a place
- How to select and filter children based on complicated conditions such as the above
- How to use the transfer group settings to select the correct transfer group based on the current year / time of year, thereby avoiding the use of a parameter which would have to be updated each year
- How to use the transfer group settings to minimise updating dates throughout the report each year
- How to guarantee that when batch-printing double-sided letters of varying length, new letters always start on the correct sheet and not on the back of the final page of the previous letter
- How to consolidate batch and individual versions of the same report into one report
- How to store the Head of Service's information in the database and display this information on all letters
- A sample report at the end of the session which contains examples of the above
- Q&A / workshop - Time to ask the consultant queries specific to your Local Authority

GIS within A&T

Intended for:

One Support Staff
Admissions Managers
Admissions Team Members

Session length: 2 – 3 hours

Outline:

This remote training sessions works though the Admissions and Transfers (A&T) Module to show the user how geographic information system (GIS) v4 integrates with the Back Office to support individual applications, enquiries from parents and bulk measuring.

The objective is to look first at the day to day usage, then go on to the advanced areas for catchments.

What will be included:

- Nearest School – how to find the nearest schools from a property, and navigation of the maps and icons
- Single Application measuring – measuring single applications and preferences.
- Bulk routines – Bulk routines for distance and catchments, and how to use pre and post allocation routines
- Bases and Catchments – Reviewing Schools, gates and viewing catchments.
- Importing Catchments – format required for GML files and importing data.
- Q&A/Workshop– Time to ask the consultant queries specific to your local authority and for the consultant to share good practice from our experience with other customers.

A&T Importing Online Applications

Intended for:

One Support Staff
Admissions Team Members

Session length: 2 – 3 hours

Outline:

This session will be useful as a refresher or introduction for new team members who are involved need to process e-applications from the Citizen Portal for School Admissions

With the majority of applications being submitted from online applications understanding this part of the module is a major *step for a successful admission round*.

What will be included:

- Rules for online applications – The rules and controls an authority has for the frequency of incoming applications
- Matching children – Why incoming children are unmatched and share best practice for matching a child
- Multiple applications – During the session a demonstration of how the new multiple applications screen works which offers application comparison for all admission groups
- Changes to applications – Using the verification flag
- Suspense – Address suspense and how the data is imported and why it happens
- Exception Messages – Hints and tips for weeding out the key messages
- New Reporting Options – Changes have been introduced to capture copies of email content into tables, and copies of submitted applications.
- Q&A/Workshop– Time to ask the consultant queries specific to your local authority and for the consultant to share good practice from our experience with other customers.

Inter LA file Exchange Workshop

Intended for:

One Support Staff
Admissions Managers
Admissions Team Members

Session length: 2 – 3 hours

Outline:

This remote training first looks at the Admissions File types to support the Admissions Process, then on your data set reviews to manage Imports and Exports of data

The objective is to use this session for new members of your team, or as a refresher to take a detailed look at your data in a test dataset to build confidence.

What will be included:

- File types – Cover the range of file types that are covered by the schema and when they are used and why.
- Exporting Files – Setup to successfully export, and how to create files.
- Importing – What happens to the data and what drives auto-matching
- Matching – How to process students – looking at real cases on your test system.
- Suspense – Rules for importing address data and processing suspense on your system.
- Exception Messages – How to use effectively
- Q&A/Workshop– Time to ask the consultant queries specific to your local authority and for the consultant to share good practice from our experience with other customers.

A&T Schools Portal

Intended for:

One Support Staff
Admissions Managers
Admissions Team Members

Session length: 2 – 3 hours

Outline:

This session will be useful as a refresher or introduction for new team members who are involved need to process e-applications from the Citizen Portal for School Admissions

With the majority of applications being submitted from online applications understanding this part of the module is a major step for a successful admissions round.

What will be included:

- Rules for online applications – The rules and controls an authority has for the frequency of incoming applications
- Matching children – Why incoming children are unmatched and share best practice for matching a child
- Multiple applications – During the session a demonstration of how the new multiple applications screen works which offers application comparison for all admission groups
- Changes to applications – Using the verification flag
- Suspense – Address suspense and how the data is imported and why it happens
- Exception Messages – Hints and tips for weeding out the key messages
- New Reporting Options – Changes have been introduced to capture copies of email content into tables, and copies of submitted applications.
- Q&A/Workshop– Time to ask the consultant queries specific to your local authority and for the consultant to share good practice from our experience with other customers.

New User Overview

Intended for:

One Support Staff
Admissions Team Managers
Admissions Team Members

Session length: 2 – 3 hours

Outline:

This session will be useful as a refresher or introduction for new team members who are involved in the processing of School Admission places within the LA. This webex will introduce colleagues to the v4 Admissions Back Office database and go through the various screens to see where key data is located and processed throughout the period of an Admissions year.

What will be included:

- Business Process – Review of the 'Admissions Cycle' and In-Year applications.
- Transfer Groups overview for the different cohorts of children, with their associated Sub-Groups of schools and their Oversubscription criteria
- Applications – how to manually add application details against children and import applications submitted online
- XML Files – Overview of the sorts of XML files and when and why they are used
- Offer Routines – How places are allocated to schools
- Other Routines – Overview of Population, Validation and post allocation routines.
- Post Offer Processes – dealing with Parental Acceptances, Appeals, Waiting Lists
- Q&A Workshop– Time to ask the consultant queries specific to your local authority and for the consultant to share good practice from our experience with other customers.

Citizen Portal Best Practice for Phased Admissions

Intended for:

One Support Staff
Admissions Team Members

Session length: 2 – 3 hours

Outline:

This session reviews the prerequisites and steps needed to implement and use the Citizen Portal for Public Applications for School Places.

It will introduce colleagues to the key differences to where customisation of text takes place either in the Citizen Portal or the v4 Admissions Back Office and will go through each of the pages viewable to a Citizen to explain how to bespoke the text on view

What will be included:

- Application Generic Pages – how to set-up wording for the Portal Global settings, Home Page and how to add children details
- Application Specific Pages – how to set-up wording on the Preference Pages, for schools and reasons associated with schools.
- Application Confirmation Pages – how to set-up wording on the Confirmation view as well as warning messages for any unsubmitted Applications
- Offer Pages – how to set-up wording for Offers made, and whether the LA allows for responses to be made by applicants to those Offers or otherwise.

In Year Transfer Group Setup and Processing

Intended for:

One support staff
Senior admissions staff

Session length: 2 – 3 hours

Outline:

Managing in-year transfers within a Local Authority can be an extremely time, often this is done outside of the Capita One system and completely separately to the other admissions processes. This webex will help Local Authorities understand how they can bring their in-year processes into the Capita One system and in line with their phased admissions whilst giving helpful tips on how to keep the setup as simple as possible.

What will be included:

- Overview – How an In-year Transfer group is used in Admissions Back Office.
- Transfer group Setup – Setting up the super group for all school, and to consider how to manage applications for schools the Local Authority do not manage.
- Options for Managing Applications – manually, and using process periods with vacancies – pro's and con's.
- Populating the group – In Year Add Students routine, including the business rules.
- Working with Applications - Hints and tips for searching and managing waiting lists
- Q&A – Time to ask the consultant queries specific to your Local Authority

Admissions End of Transfer Phase

Intended for:

One support staff
Senior admissions staff

Session length: 2 – 3 hours

Outline:

As the admissions phase draws to a close Local Authority (LA) admissions teams are extremely busy finalising offers and preparing for the next round. This session is designed to cover the essential tasks LAs must complete at this time of year and to refresh the knowledge of LA staff who may not have completed these processes in the previous 12 months.

What will be included:

- Transferring applications from phased – Moving your outstanding phased applications into in-year admission transfer groups
- Managing waiting list/in-year admissions – Essential checklist for managing your waiting lists and in year admissions for the upcoming academic year
- Final transfer routine – Understanding the final transfer routine and making it work for you
- Out of area offers – Best practice for working with your neighbouring authorities effectively
- Admission Transfer Files (ATF) for schools – Transferring information to your schools using ATFs
- Q&A – Time to ask the consultant queries specific to your Local Authority

Managing In Year Applications with the Citizen Portal

Intended for:

One Support Staff
Admissions Managers

Session length: 2 – 3 hours

Outline:

With the majority of applications being submitted from online applications for phase admissions the next logical setup is to use the software to include In-Year online admissions. However, there are different challenges in managing this process

This course starts with the assumption you are using the Citizen Portal for Admissions and follows through how to extend this to your In-Year process. It addresses the challenge of adapting the current confirmation

What will be included:

- Rules for online applications – The rules and controls an authority has for the frequency of incoming applications. Setup of the In-Year group for online
- Multiple applications – During the session a demonstration of how multiple applications screen works which offers application comparison for changes to In-Year applications, and how to merge applications.
- Setup – Overlap and new areas of text to setup on the Citizen Portal
- User Defined Questions – adding and incorporating site specific questions for online applications.
- Parental Responses – Setup of responses to parents and how the Admissions User can publish standard and individual messages to parents.
- Q&A/Workshop– Time to ask the consultant queries specific to your local authority and for the consultant to share good practice from our experience with other customers.

05 | Ask the Expert

Aims and Objectives

Ask the expert is a series of individual modular specific webinars giving customers the opportunity to seek advice from a module expert directly. Through the use of webex, you will be able to share your screen with the expert who will be able to provide advice and guidance specific to your Local Authority to enable you to better support your service users.

Benefits

- Refine and deploy more advanced configuration of the system to better support your services
- Improve the user experience
- Receive consultation services which are timely and cost effective
- Improve data recording and quality
- Reduce the amount of external recording

06 | Attainment Data

Attainment Data in One

Intended for:

Data Officers
Performance Officers

Session length: 2 – 3 hours

Outline:

This session will demonstrate the Attainment functionality within the Pulse module. Delegates will learn how to configure the application in order to import the latest attainment data, how to import Attainment files using the predefined File Import Specifications and how to access the data using Results Organiser.

We will also discuss how attainment data can be used to support other processes and how the additional contextual data in One can be used to improve outcomes.

What will be included:

- Setting up the Attainment/Census Year Definition
- Importing the AMPARK Aspects and Templates
- Importing the CTF Translation file
- Importing Attainment files using the predefined File Import Specifications
- Using Results Organiser
- Q&A / workshop - Time to ask the consultant queries specific to your Local Authority

07 | B2B

New User Overview

Intended for:

ONE Data Officers who are responsible for using the B2B: Student module to process data conflicts

Session length: 2 – 3 hours

Outline:

The B2B: Student module is used to process data conflicts arising from the transfer of student data between SIMS and ONE. This WebEx will introduce ONE Data Officers to the B2B: Student module in particular on how to resolve these conflicts and also an overview of the product.

This course assumes the local authority has completed the Phase 2 implementation for their schools and have moved their Scheduled Tasks across from SIMS to ONE.

What will be included:

- An overview of B2B: Student file transfer.
- How to use the menus and searches on the different screens.
- Data Processing Rules – what these are for and how to manage them.
- Managing the hashed cache
- How to Process Unmatched Students and Matched Students with Data Conflicts - when a student is in either of these areas.
- How to use the Exceptions and Rejections reports in B2B.
- B2B: Student Scheduled Tasks - how to create and manage scheduled tasks.

Scheduled Tasks for Attainment Data

Intended for:

ONE IT Support who currently support the Data Officers who use the B2B: Student module in ONE
Data Officers who currently use the B2B: Student module to import data into ONE Attainment Officers
who currently use the PULSE module and manually import the statutory assessment information in ONE

Session length: 2 – 3 hours

Outline:

B2B Attainment included in the 3.59 release of Capita One will allow a local authority (LA) to create scheduled tasks to collect attainment data where the school and LA share the same Aspect definitions. To make the creation of schedules as easy as possible they will work by selecting an Aspect Hierarchy. Aspect Hierarchies are collections of Aspects defined by the LA, these are commonly arranged by Key Stage or Subject

This WebEx will introduce LA's to the new functionality and help them to understand where it can be used effectively for attainment data collection directly from schools.

What will be included:

- Prerequisites – Outline of the prerequisites required and the configuration of the ONE system prior to using the B2B Attainment tasks feature
- Transferring Non-Standard data from SIMS to ONE – An overview of how non-standard data can be imported through B2B Attainment – creating Gradesets/Aspects/Aspect Hierarchies/Exporting to SIMS
- Transferring Statutory Data via a Scheduled Task – An overview of how statutory data can be imported through B2B Attainment – creating Aspect Hierarchies using AMPARK aspects.
- Creating the B2B Attainment task – How to create the task to import the data automatically into the Pulse module.
- Using Results Organiser to view the results in v4 Client from both transfers of Statutory and Non-Standard data transfers.
- Q&A – Time to ask the consultant queries specific to your Local Authority

Address Management with WAV (Web Address Validation)

Intended for:

ONE IT Support who currently support the Data Officers who use the B2B: Student module in ONE
Data Officers who currently use the B2B: Student module to import data into ONE
SIMS Officers who currently support the B2B file transfer from SIMS to ONE

Date: Session length: 2 – 3 hours

Outline:

The School's management information system SIMS has the ability to validate addresses against an external system as they are entered. The SIMS user can choose to validate new addresses, as they are added, or those already in the system. To validate an address, the user activates a validation button, causing SIMS to send an address validation request over the internet. The routing of the request is controlled by the set-up configuration specified by the SIMS system administrator. Currently all SIMS address validation requests are sent to a national address validation database, whose address catalogue has been supplied by the DfES.

Some Authorities are finding that the detail of the addresses held in the national database is different to that of their own addresses held in ONE. As a result, not all the validated addresses exported from SIMS are recognised when they are imported in ONE. This gives rise to extra work within the authority to resolve any differences between the addresses stored in ONE and those from the national database.

To help with this, the One Web Address Validation service has been created to provide an alternative to the national database for SIMS address validation. It will respond to an address validation request from SIMS by providing addresses that have been retrieved from the One address tables.

This WebEx will introduce LA's to this service and how to configure it within the One system to enable Local Authorities to use this for their Sims Schools.

What will be included:

- Overview of How WAV works
- Configuration in One
- Configuration in Sims

08 | Children in Entertainment & Employment

New User Overview

Intended for:

ONE Data Officers who will be responsible for using the Children in Employment and Children in Entertainment (CiEE) modules to create Employment/Entertainment and Chaperone licences.

Session length: 2 – 3 hours

Outline:

The children in entertainment and employment (CiEE) module is used to record and manage data for students who are either employed or taking part in performances and recording details of people who chaperone those performances. There are a number of licences which can be produced using this module.

This WebEx is an introduction on how to create basic Employment and Entertainment applications for students and how to add Chaperones to the system.

What will be included:

- Overview of the module – explanation of the modules. Searching and navigation around the menus/screens. Configuration of the module in the default setups.
- Employment Applications – the process of creating an application for a work permit for a student including entering working hours, licence conditions and generating the licence.
- Chaperones – the process of adding a new chaperone onto the system in order to use them in the Entertainment applications which includes Checks & Referees. Also, how to add a parent/carer as a chaperone for a performance for their own child.
- Individual Entertainment Applications - process of creating an application for an individual student for a performance including setting up a performance schedule/licence conditions/chaperone and generating the licence. (NB there is a separate WebEx course for larger performances with multiple students).
- Managing Employers – how to manage existing employers – including contacts/inspections and the bulk inactivity process.
- Module Reporting – how to use the Reports Menu to produce standard CiEE reports.
- Different Types of Licences – explanation of the different performance licences available in the Entertainment module – Bulk licence, Body of Persons Certificate and Open Licences.

09 | Children's Support Services (CSS)

Creating a CSS Service

Intended for:

LA Childrens Services
One support staff
Performance Monitoring and Reporting Officers

Session length: 2 hours

Outline:

This session is designed to demonstrate best practice around creating new Services in the One v4 CSS Module. We will discuss the various advantages and disadvantages to the various approaches that can be taken when creating a new service team.

What will be included:

- Posts – Overview of defining key team members or professionals who need to be linked to Student, Person , or Base records
- Service Team Definition – Defining Service Specific Lookups (Pick Lists/Drop Down Boxes)
 - Configuring Activities
 - Configuration of Provision
 - Access Control
- Involvement Form Definition – Defining the purpose for the Involvement form
 - In depth look at how Involvements can be used
 - Service Specific lookups
 - User Defined Fields
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice.

Introduction to Activities

Intended for:

One Coordinators
One support staff
Senior CSS users

Session length: 2 – 3 hours

Outline:

The activities functionality forms a key part of the CSS licence but is often overlooked by local authorities when implementing new, or expanding the scope of existing services. Activities not only allow service teams to record details of meetings with individuals they also provide a facility to log recurring group sessions, log details specific to individual attendees, record linked work performed as part of early interventions and even link activities to the results organiser functionality.

What will be included:

- Managing codes - Setting up codes for activity type, focus and support type
- Linked people - Using the flexible linked people panel to associate people, families and other groups with an activity
- Where can I record activities and why? - Recording activities against people, bases, and involvements
- Best practice examples – Our consultant will give examples of where activities have been used successfully
- Managing activity time categories – Choosing which categories are available and which ones are mandatory
- Recurring activities – Setting up a regular activity using a scheduler
- Q&A – Time to ask the consultant queries specific to your Local Authority

10 | Early Years

Better Start Overview

Intended for:

One support staff
Better Start Data Collection Team
Performance Monitoring and Reporting Officers

Session length: 2 – 3 hours

Outline:

This session will demonstrate the functionality of the Better Start module, showing the method used to create Gradesets, Aspects and Templates, populated by age related Child level assessment data at the point of measurement at either the Provider they are attending, or an associate. Demonstrating how Better Start can be used to more efficiently record details of both issued and adhoc assessments to facilitate LA and Provider reporting.

Current Processes to collect time critical assessment data, and use this to identify needs and trends are often incomplete.

Better Start will remove the need for Local Authorities to collect assessments via a combination of manual processes, and enable the Local Authority to collect and analyse real time progress, developmental and attainment data for 0-5 year olds directly from the providers.

What will be included:

- Attainment Data – Understanding how Templates are built up using: Gradesets, Age Mappings and Aspects.
- Issuing Assessment Tasks - Create and manage Tasks for Better Start submissions.
- Messaging – Local Authority and Provider view of Messages.
- Matching Children – Why incoming children are unmatched and share best practice for matching child.
- Adhoc Assessments – Providers self-issue Assessments.
- New Reporting Options – Changes have been introduced to allow Providers to run their own (LA provided) reports.
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share any tips or advice

Early Years Finances

Intended for:

Early Years Team
 One support staff
 Performance Monitoring and Reporting Officers

Session length: 3 hours

Outline:

This session is designed to demonstrate best practice around the functionality of the Early Years processes, showing the different methods that can be used to record Child level data and Actual Hours / Claimed Funded Hours at the Provider(s) they are attending. Demonstrating how Early Years can be used to better record details of adhoc financial transactions to facilitate reporting to your Finances Team / Solution, and show enhancements over recent releases.

It will be particularly useful for Local Authorities that desire to move away from a combination of Spreadsheets and External Database Solutions; even though they may already be Early Years module users, or to ensure that Early Years is being used in the most efficient way.

What will be included:

- Data recording – Overview of data recording practices and how this can improve your current processes.
- Payments
 - Configuring payments
 - SFF / EYPP
 - MINT
 - INT by Provider
 - INT by Child
 - Bulk / Spot Payments
 - Apportionment
 - Collection of Interim / Actual / Adjustment
 - Headcount Portal impact
- Other Features – Introducing more recent Early Years additions
 - Early Years Pupil Premium
 - Two Year Old Funding
 - Multi Line recording of Actual and Funded hours
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice. For instance, Monthly Payments and 30 Hour funding

eStart Advanced Features

Intended for:

One eStart support staff
Performance Monitoring and Reporting Officers

Session length: 2 – 3 hours

Outline:

eStart is typically used as a Transactional solution, recording registrations and event attendance in Children's Centres up and down the country. This session is to look deeper into the functionality and demonstrate how eStart can be used to better record details of the family journey and progress. In this session Children's Centres will learn how they are able to exploit the capabilities of eStart and how it can support them with their Ofsted inspections.

What will be included:

- Data recording – Overview of current data recording practices and how this can significantly impact your Centre
- Ofsted – Common themes around Ofsted inspections we have gathered whilst supporting LA's and Children's Centres
- Advanced Features – An Introduction to more advanced eStart features
 - Baseline of a Family Journey
 - External identifiers
 - Service requests
 - Events and improved outcomes
 - Linked documents
- Reporting and Flexible Reporting – Understanding the changes and features associated with reporting from eStart and how they can help you.
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice ideas from the best performing centres

eStart Flexible Reporting

Intended for:

One eStart support staff
Performance Monitoring and Reporting Officers

Session length: 2 - 3 hours

Outline:

eStart Flexible Reporting will demonstrate the functionality and look at how eStart can be used to report details of the family and their circumstances. In this session you will learn how to exploit the capabilities of eStart Flexible Reporting and extract the data to better support Children's Centres and Local Authorities.

What will be included:

- Data recording – Overview of current data recording practices and how this can significantly impact reporting
- Permissions and Groups – Understand the Groups and Permissions necessary to access Flexible Reports, and to Edit or View Flexible Reports
- Custom Queries – Understanding CQs Internal / Repository / Permissions
- Standard Reporting - Understanding the changes and features of Standard Reports
- Flexible Reporting – Understanding the changes and features associated with reporting from eStart and how they can help you.

- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice ideas from the best performing centres.

Headcount Portal Administration

Intended for:

One Early Years Administrators who are responsible for collecting the data from the Providers. This is aimed at either New Early Years Administrators or a refresher for existing Early Years Administrators who are currently using the system.

Session length: 2 – 3 hours

Outline:

The Early Years Headcount Portal is an online product which enables LAs to pass information to their Early Years' Service Providers to collect their student data and attendance information electronically in order to make financial payments to them.

This WebEx is to train Early Years Team Administrators on how to administer the tasks they need to send to their Service Providers to import the data transferred from them; match the students in the database and how to report on the information received.

This course is aimed at those LAs currently using the Early Years Module in v4 client for payments and the Early Years Headcount Portal.

What will be included:

- Setting the data processing rules for the Service Providers.
- Demonstration on how to do the following processes: -
 - Within the Early Years Headcount Portal –
 - Create message templates and messages to send to the Early Years Providers via the Portal.
 - Create tasks to send to Early Years Providers via the Portal.
 - Registration of Service Provider users onto the Early Years Headcount Portal and how they can enter data for existing students and for new students.
 - Submit the data to the LA.
 - LA User Admin – how to view what stage the tasks are ie 'Not started or submitted' via the Portal. How to message the services near to the deadline date if they have not yet submitted their information.
 - Within v4 Online Portal Back Office
 - Matching the students to students who are on the One system already or adding new students to the database using the Portal Back Office. Dealing with any data conflicts.
 - Within v4 Client
 - Viewing the data within the Early Years Funded Service Providers.
 - Generating Payments.
 - Authorising Payments.
 - Within Early Years Headcount Portal Administration
 - Create reports and send them to the Service Providers.
 - Viewing reports as a Service Provider.

Pupil Premium

Intended for:

Early Years Team
One support staff
Performance Monitoring and Reporting Officers

Session length: 2 hours

Outline:

This session is designed to demonstrate best practice around the functionality of the Early Years Pupil Premium processes, showing the different methods that can be used to record EYPP at Child level and how this will impact your Early Years funding processes, and to ensure that Early Years is being used in the most efficient way. It will cover EYPP for economic reasons, discuss the LAC process including Virtual Schools, and demonstrate automation of the LAC funding stream; if the payment is going to the Funded Provider instead of the Virtual School Head.

What will be included:

- **Data recording** – Overview of EYPP data recording practices and how this can improve your current processes. And any impact of current EYPP Processes during the changeover to automation.
- **EYPP Payment**
 - Configuring EYPP for automation
 - Configuration of SFF for EYPP LAC
 - Different ways of recording EYPP
 - Impact of EYPP Timing on finances
 - Headcount Portal impact
- **Q&A/Workshop** – *Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice.*

Self Update Provider Portal

Intended for:

Early Years / FID Team
One support staff
Performance Monitoring and Reporting Officers

Session length: 2 - 3 hours

Outline:

This session is designed to demonstrate best practice around the functionality of the Early Years Self Update portal, showing the method used to Record / Update Providers Service details and how this will impact your Early Years/ FID processes, and to ensure that Early Years SUPP is being used in the most efficient way. It will cover EY SUPP for updating existing Services and adding new Services.

What will be included:

- Configuration and Security – Options that can be chosen for all providers, and how to setup users and link them to Services.
- Text Content – Text areas for SUPP you need to be aware of
- Email Templates – Submit and Approve Templates
- Data checking / recording – Overview of EY SUPP data recording practices and how this can improve your current processes.
- EY SUPP
 - Choosing your Service
 - Reviewing Services
 - Adding New Services
- EY Team
 - Managing Incoming Data Quality
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice.

11 | Governors

New User Overview

Intended for:

ONE Data Officers who will be responsible for using the Governors module to record Governing Body information

Session length: 2 – 3 hours

Outline:

The Governors module is used by LA's to record and manage data regarding School Governing Bodies. This includes creating Establishments, Governing Bodies and their Sub- Committees, Managing Governors and recording documentation required for the meetings (Agendas & Minutes).

This WebEx is to train ONE Data Officers how to use this module and all the functionality the module offers.

What will be included:

- Overview of the module – explanation of the module. Searching and navigation around the menus/screens.
- Establishments – how to add a new establishment for the composition of the Governing Body
- Governing bodies – how to add a new Governing Body.
- Governors – how to add & remove Governors to the Governing Body with their relevant Governor type and record their personal information/qualifications/training & checks.
- Sub-Committees - how to add new Sub-Committees to the Governing Body.
- Meeting Information – recording the dates of the meetings set up for each Governing Body and adding actions for those meetings. Creating action templates to make this more efficient for regular meetings. Users can see what actions have been completed or are outstanding. This is a good user and management tool.
- Communications Log – creating a record of the type of communications you have had with the Governing Body.

12 | Grants and Benefits

New User Overview

Intended for:

ONE Data Officers who will be responsible for using the Grants and Benefits module to record applications for Free School Meals or Clothing Grants.

Session length: 2 – 3 hours

Outline:

The Grants and Benefits module is used to record and manage claims made by parents for students to receive either a Free School Meal or a Clothing Grant.

This WebEx is to train ONE Data Officers on how to record this information within the module and the processes involved.

What will be included:

- Overview of the module – searching and navigation around the menus/screens. Configuration of the module in the administration area.
- Applications via the Student – how to add an application using the student and adding the carer as part of the application.
- Applications via the Parent – how to add an application using the parent adding the student as part of the application.
- Adding Siblings to an Application – how to add siblings to create the applications all at the same time.
- Adding/Editing Student and Parent/Carer information – how to update information relating to the student or carer within the application.
- Eligibility Checking Service – how to check an applicant is eligible using the built in ECS validation linked to the DWP (If the LA has this set up in the Grants and Benefits module) and how to view the history of this check. (NB there is a separate WebEx session covering how to run the ECS for batch validation for all claims.)
- How to produce Letters to send to the Parent – using linked reports to create the letters to send to the parents at the end of the application.
- Informing Schools of the New Applications – look at the different ways in which this information can be sent to the schools.
- Batch Processing feature – how this can be used to identify multiple applications to apply different processes.

Eligibility Checking Services

Intended for:

ONE IT Support who currently support the Data Officers who use the Grants and Benefits module in ONE
Data Officers who currently use the Grants and Benefits module to record Free School Meals Applications

Session length: 2 – 3 hours

Outline:

Within the Grants and Benefits module in ONE is an Eligibility Checking Service (ECS) provided by the Department for Work and Pensions (DWP) which checks to see if applicants are eligible to receive Free School Meals (FSM).

This WebEx will introduce LA's to this service and how to use it. This can be used for individual applications or multiple applications.

What will be included:

- Configuration of the ECS – advice on how to configure the Grants and Benefits module in order to use this service including providing information for the LA on how to become accredited with the DWP.
- Overview of the Service – how this service works and what the LA need to understand about the process and the different scenarios they need to plan for.
- Running the ECS – on an individual applicant as part of adding the claim and viewing the History of the checks.
- Running the ECS Batch Validation – this is to check multiple applications in bulk on a regular basis. The LA will be shown how to check that their eligible applicants are still eligible or whether they have become ineligible since the last run was made or to check if applicants who were not eligible at the date of the last run have since become eligible.
- Producing Standard Reports to View the Results – how to use the standard reports within the module to show the results of the applicants – which ones have been processed or failed during the ECS run.
- Batch Processing Feature – how to use this to identify the applicants with changed results and update them in bulk as appropriate.
- How to Plan 'Starting to use the ECS' – advice on how to start using this in the live environment.

13 | Integrated Youth Support Services

An Introduction to IYSS

Intended for:

All staff

Session length: 2 – 3 hours

Outline:

This course is designed to provide users with a general overview of IYSS covering common aspects of system functionality for frontend users. This course is particularly useful for casual staff or volunteers that need to learn the basics. Users will be navigated around the system, observing the completion of basic tasks whilst familiarising themselves with our product.

What will be included:

- System do's and don'ts
- System functionality
- How to search for a Client
- System Navigation
- How to update IYSS records
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

An Introduction to IYSS System Admin

Intended for:

One Support Staff
Local System Administrators

Session length: 2 – 3 hours

Outline:

This course is designed to provide users with a general overview of the IYSS System Admin client, covering common aspects of system functionality for system support staff and administrators. This course is particularly useful for support staff that need to learn the basics or those who have recently changed their role. Users will be navigated around the system, observing the completion of basic tasks whilst familiarising themselves with our product.

What will be included:

- System do's and don'ts
- System functionality
- System Values
- Scheduled Jobs
- Users & Security
- Configuring Lookups
- Reporting
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

NCCIS Monthly Submissions

Intended for:

One Support Staff
Local System Administrators
Local Report Writers
One IYSS Service Managers
One IYSS Team Members

Session length: 2 – 3 hours

Outline:

This course is essential for anyone responsible for the generation of the NCCIS monthly submissions. During this course participants will explore the process involved with the completion of this statutory reporting requirement and the associated components. The session will involve aspects of the frontend and the IYSS System Admin client, familiarity of both are beneficial but not essential.

What will be included:

- Prerequisites
- NCCIS XML Rules
- Monthly XML File Production
- Submitting the DX Job
- September Guarantee
- Annual Activity Survey
- Baselines
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Annual Activity Survey

Intended for:

One Support Staff
Local System Administrators
Local Report Writers
One IYSS Service Managers
One IYSS Team Members

Session length: 1 – 2 hours

Outline:

This course is essential for anyone responsible for the generation of the Annual Activity Survey. During this course participants will explore the process involved with the completion of this statutory reporting requirement and the associated components. The session will involve aspects of the frontend and the IYSS System Admin client, familiarity of both are beneficial but not essential.

What will be included:

- Prerequisites
- NCCIS Rules
- Annual Activity Survey
- Baselines
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

September Guarantee

Intended for:

One Support Staff
Local System Administrators
Local Report Writers
One IYSS Service Managers
One IYSS Team Members

Session length: 1 – 2 hours

Outline:

This course is essential for anyone responsible for the generation of the September Guarantee. During this course participants will explore the process involved with the completion of this statutory reporting requirement and the associated components. The session will involve aspects of the frontend and the IYSS System Admin client, familiarity of both are beneficial but not essential.

What will be included:

- Prerequisites
- NCCIS Rules
- September Guarantee
- Baselines
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Data Orientation & Crystal Basics

Intended for:

One Support Staff
Local System Administrators
Local Report Writers

Session length: 2 – 3 hours

Outline:

This course provides users with an overview of crystal report writing in conjunction with the One IYSS module. Users will explore the relationships between Capita education data and One IYSS.

What will be included:

- Shared data between One and IYSS
- Do's and Don'ts
- Primary and Foreign Keys
- Naming Conventions
- Main Data Entities and Links
- Field Identification
- Reports
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Managing Interactions

Intended for:

One Support Staff
Local System Administrators
One IYSS Team Members

Session length: 1 – 2 hours

Outline:

This course provides users with an overview of the IYSS Interactions and Activities functionality. This session is beneficial to sites who would like to review their current setup/options and understand the capabilities and additional features of this function. The session will involve aspects of the frontend and the IYSS System Admin client, familiarity of both are beneficial but not essential.

What will be included:

- System do's and don'ts
- System functionality
- Interactions
- Activities
- Outcomes
- Venues
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Imports & Bulk Updates

Intended for:

One Support Staff
Local System Administrators
One IYSS Service Managers
One IYSS Team Members

Session length: 2 – 3 hours

Outline:

This course provides users with an overview of the IYSS import and bulk update functionality. This session will focus on the IYSS import workflows and data translations as well as the bulk update capabilities of the system and the associated permissions. The session will involve aspects of the frontend and the IYSS System Admin client, familiarity of both are beneficial but not essential.

What will be included:

- System do's and don'ts
- System functionality
- Methodology & translations
- Imports
- Bulk Updates
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Enhanced Assessments

Intended for:

One Support Staff
Local System Administrators
One IYSS Service Managers
One IYSS Team Members

Session length: 2 – 3 hours

Outline:

This course provides users with an overview of the IYSS enhanced assessment functionality. This session will focus on the IYSS assessment setup, configuration and distribution options. The session will involve aspects of the frontend and the IYSS System Admin client, familiarity of both are beneficial but not essential.

What will be included:

- System do's and don'ts
- System functionality
- Enhanced Assessments
- Elements & Values
- Scoring & Progress
- Assessment Guidance
- Functions & Templates
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

14 | Reporting

Crystal for Beginners

Intended for:

One support staff
Performance and reporting officers

Session length: 2 – 3 hours

Outline:

Crystal has been a vital tool for One users and support staff for well over 10 years and many LA's have invested heavily in its use over that time. In this session delegates will learn the basics of Crystal from the setup of options to being able to create a basic report.

What will be included:

- Setting up Crystal Options and defaults for optimal usage
- Creating a connection to the database
- Setting up a new report
- Linking tables
- Filtering data
- Sorting data
- Creating formulas
- Update a report location for different databases
- Adding a group
- Creating a basic Cross Tab report

- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Crystal for Intermediates

Intended for:

One support staff
Performance and reporting officers

Session length: 2 – 3 hours

Outline:

Crystal has been a vital tool for One users and support staff for well over 10 years and many LA's have invested heavily in its use over that time. In this session delegates will learn some more advanced Crystal techniques which will help them take the next step in their use of the powerful reporting tool.

Note: Delegates are expected to have a reasonable knowledge of Crystal basics in advance of this session.

What will be included:

Crystal Features – A dive into a range of more advanced Crystal features and how these can be applied in your LA:

- Using parameters within your report
- Creating linked reports for use within ONE
- Using formulas within your reports
- Using totals within your report
- Conditional formatting of records, fields or text boxes
- Conditional report section suppressing
- Using sub reports

- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority

SQL Basics Agenda

Intended for:

One support staff
Performance officers or LA report writers

Session length: 2 – 3 hours

Outline:

Structured Query Language (SQL) is the basis of all reporting options within the Capita One system and a working knowledge is a significant advantage to anybody who is required to extract information from the database. This session will talk delegates through the fundamentals of SQL using Capita One data and give delegates an overview of how SQL can help with their wider report writing or alert requirements.

What will be included:

- What is SQL and where is it used – An overview on “Structured Query Language” (SQL) and how it is used with Capita One Reporting
- Simple SQL queries – Understanding how to extract simple information from the database
- Sorting and filtering data – How to sort and filter your information in SQL to make it easier to view and to remove unwanted records
- Grouping and aggregating data – Summarising your data by grouping particular data and applying counts or
- Linking tables – Taking data from multiple areas of the system and joining it together to produce more complex SQL queries
- Q&A – Time to ask the consultant queries specific to your Local Authority

SQL Intermediate

Intended for:

One support staff
Performance officers or local authority report writers

Session length: 2 – 3 hours

Outline:

SQL is the basis of all reporting options within the Capita One system and a working knowledge is a significant advantage to anybody who is required to extract information from the database. This session will talk delegates who have either attended the SQL Basics course previously, or already have a basic knowledge of SQL through some of the more advanced SQL commands.

What will be included:

- Applying filters within your join statements to return only relevant data – e.g. to return all students and any permanent exclusions within the current academic year
- Using subqueries – e.g. list all involvements and the number of reasons recorded for each of them
- 'Self-joining' tables – e.g. finding all other people with the same correspondence address as a student
- Using 'Union' to return all data from multiple subqueries as rows – e.g. total cases by caseworker and total for the whole authority
- Returning previous or next field values – e.g. end date of previous school for each student
- Restricting records to a number of rows – e.g. a student's current school and the previous school they attended
- Pivoting rows of data into a single (comma) separated column – e.g. all outcomes rows recorded against an involvement as a single column within the involvement row
- Other useful SQL functions
- Q&A – Time to ask the consultant queries specific to your Local Authority

SSRS Basics

Intended for:

One support staff
Performance officers or LA report writers

Session length: 2 – 3 hours

Outline:

SSRS (SQL Server Reporting Services) is a powerful and flexible reporting option available to local authorities (LA's) who want to open up the wealth of information within their One system more accessible to operational staff and senior leaders. This session will give an introduction to the SSRS functionality and how it can be used with the Capita One system to publish basic reports.

Tips will also be given on how to convert existing Crystal Reports over to SSRS reports to reduce the development time required within the Authority.

What will be included:

- Setting up a connection – setting up a connection to the Capita One system
- Adding data sets – extracting data from the system using either SQL queries or the visual interface
- Using filters – restricting data being returned in the query
- Adding fields to tables – using the SSRS design view to change the fields displayed to the end user
- Formatting data – formatting data to make dates display correctly or change font/style or colour
- Adding additional tables – adding more tables from the database into the report
- Simple aggregates – aggregating data to show totals and counts
- Special fields – adding data extract dates to reports
- Publishing reports – publishing a report to the server for others to view

- Q&A – Time to ask the consultant queries about how SSRS can be used to help your LA

SSRS Intermediate

Intended for:

Performance officers and local authority report writers with basic knowledge of SQL Server Reporting Services.

Session length: 2 – 3 hours

Outline:

This session builds upon the SQL Server Reporting services (SSRS) Basics course to enable report writers within the Authority to produce more detailed and in-depth reports across the Capita One system for delivery to service and senior managers to drive strategic business decisions.

This session builds on making reports more flexible, by using parameter driven reporting, to reduce the number of reports required to meet service needs and therefore reduce time needed to create or make changes to reports to meet user needs or changes in requirements.

During the session you will also see how to make reports easier to navigate, or give the user more control over how they see the data and how much data they want to display.

The session also introduces graphs as a means for displaying data to provide impact or for inclusion with dashboards with options to drill further to view the underlying data.

What will be included:

- Expressions – using expressions within your report
 - Parameters – provide more flexible reporting options
 - Interactive sorting – up or down? Let the user decide!
 - Drill down reports – exploding data on demand
 - Drill through (hyperlinked) reports – taking users in new directions
 - Document Maps – enhancing user experience
 - Matrix Reports – using a matrix to summarise data by row and column
 - Graphs – using graphs to create visual impact and dashboards
-
- Q&A – Time to ask the consultant queries about how SSRS can be used to help your LA

Reporting on Children's Support Services involvements

Intended for:

Report writers within the Authority with experience of either Crystal or SQL Server Reporting Services (SSRS)
One Support Team

Session length: 2 – 3 hours

Outline:

This will enable report writers or One support team members to understand the tables used to record data input through the One interface within involvement forms. The course will look at all the panels within a 'standard' involvement form, and which table within the database that data is stored in, as well as looking at the additional panels available through a 'legal actions' involvement form and the related tables. The session will also briefly deal with activities and communication log entries recorded against involvement forms and how these link together.

During the session, reports will be used to illustrate how the tables are linked together to produce outputs as graphs, crosstabs or lists as well as illustrating how these reports may be brought together within an example dashboard. The skills and knowledge gained through this session can also be used to produce reports identifying issues with data – for example missing data – to enable data cleansing to take place.

At the end of the session, all reports used will be made available to delegates in either Crystal or SSRS format.

What will be included:

- Overview of example 'standard' and 'legal actions' involvement form panels, and the tables the data is stored in once input
- Overview of how these tables are linked together to enable authorities to produce meaningful reports using either Crystal or SQL Services Reporting Services (SSRS)
- Overview of how activities and communication log entries are linked to involvement forms through the database tables
- Using reports to identify missing or conflicting data – for example involvements with an end date but an active status or closed involvements with no outcomes recorded.
- Example dashboard report produced (in either Crystal or SSRS format) to consolidate understanding and for conversion to use within Authorities
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share any tips or advice

Reporting on Addresses

Intended for:

Address Administrators

Session length: 2 – 3 hours

Outline:

Address accuracy is vital in the One System for sending letters to the correct recipients, assign places for admissions, adding children to the correct Transport Route. With the use of AddressBase imports addresses can be kept up to date and new addresses added; but how can you deal with existing address that have not been maintained by the imports due to not matching or if users edit existing imported addresses incorrectly? This course will provide you the fundamentals needed to create reports to check on Address accuracy in the One System compared to the AddressBase imports.

What will be included:

- A look at the tables used for One and AddressBase addresses
- Linking the tables together
- A look at Crystal reports that may be useful in keeping addresses tidy which include:
 - Addresses with a phone number
 - Inconsistent address data from AddressBase files where the same street has a different name spelling or missing information
 - Address in One with the same UPRN
 - Entities linked to the same address more than once
 - Entities linked to ungeocoded addresses
 - One and AddressBase difference on Geocoded addresses
 - Streets in One with no USRN
 - Users who have edit rights to addresses in V4
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority

Reporting on Governors

Intended for:

Report writers within the Authority with experience of either Crystal or SQL Server Reporting Services (SSRS)
One Support Team

Session length: 2 – 3 hours

Outline:

This will enable report writers or One support team members to understand the tables used to record data input through the Governors interface. The course will look at all the tabs used to record Governing body information as well as meetings, committees and vacancies. We will then look at how Governors themselves are recorded and the tables this data is stored in – this will include any positions they hold or committees they attend as well as checks and training. The session will also briefly deal with communication log entries recorded against Governing Bodies or Governors and how these link together.

During the session, reports will be used to illustrate how the tables are linked together to produce outputs as graphs, crosstabs or lists as well as illustrating how these reports may be brought together within an example dashboard. The skills and knowledge gained through this session can also be used to produce reports identifying issues with data – for example missing data – to enable data cleansing to take place.

At the end of the session, all example reports used will be made available to delegates in either Crystal or SSRS format.

What will be included:

- Overview of Governing Body and Governors screens, and the tables the data is stored in once input
- Overview of how these tables are linked together to enable authorities to produce meaningful reports using either Crystal or SQL Services Reporting Services (SSRS)
- Overview of how communication log entries are linked to either Governing bodies or Governors through the database tables
- Using reports to identify missing data – for example no ethnicity or dob recorded for a Governor.
- Example dashboard report produced (in either Crystal or SSRS format) to consolidate understanding and for conversion to use within Authorities

Reporting on Timelines

Intended for:

CSS and SEN users who use timelines

Session length: 2 – 3 hours

Outline:

Timelines are very useful for completing involvement forms and sticking to time limits set by the timeline, the course will show how you can report on the timeline events to provide management reports or personal monitoring reports on the progress of all active timelines.

What will be included:

- A refresher on timelines and the use of time limits.
- How communication log entries look when generated from a timeline
- Running the Scheduled task to populate the timeline reporting table
- Types of Crystal reports that can be created from the timeline such as:
 - Personal events due to expire
 - Timeline Events exceeding limits
 - Timeline events where a response has not been received to a letter or email

- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority

Reporting on Vulnerable Groups

Intended for:

Report writers within the Authority with experience of either Crystal or SQL Server Reporting Services (SSRS)
One Support Team

Session length: 2 – 3 hours

Outline:

This session will investigate how One can be used to identify a child is a member of a potentially vulnerable group – e.g. known to social care, a looked after child, in receipt of free school meals, where English is an additional language etc – and how these groups can be used to drive reports highlighting issues or celebrating success.

At the end of the session, all reports used will be made available to delegates in either Crystal or SSRS format.

What will be included:

- Understand all the data elements currently available through the One interface to mark a child as a member of a vulnerable group – e.g. the known to social care flag, the looked after child link, whether a child is receiving free school meals or the EAL check box.
- Understand how user defined fields might be used to add further fields to flag authority specific groups.
- Understand how these data elements might be used within Crystal or SSRS reports to return appropriate data either at an individual or group summary level - e.g. exclusions of looked after children compared to overall exclusions of all children
- Example dashboard report produced (in either Crystal or SSRS format) to consolidate understanding and for conversion to use within Authorities
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share any tips or advice

15 | SEND

Streamlining Processes with Timelines and Quick Reports

Intended for:

One support staff
SEND Staff

Session length: 2 – 3 hours

Outline:

The timeline and quick reports functionality have been available in the One system for a number of years and are key to managing the strict SEND timescales but they can also be used in other areas of the system. In this session we will give delegates an introduction to the functionality along with some thoughts about where it can be used to improve processes with the LA.

What will be included:

- Basics of a timeline – An overview of the timeline functionality and a demonstration of where they are used within the Capita One system
- Components of a timeline – Breaking down the elements of a timeline to get an understanding of their component parts
- Building and deploying a timeline – The consultant will demonstrate how to build a simple functioning timeline and configure it to run in our demo system
- Quick reporting –Introducing the concept of quick reporting with and without timelines to gain an understanding of this simple, but powerful feature.
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

16 | Youth Justice

An Introduction to YJ

Intended for:

All staff

Session length: 2 – 3 hours

Outline:

This course is designed to provide users with a general overview of YJ covering common aspects of system functionality for frontend users. This course is particularly useful for casual staff or volunteers that need to learn the basics. Users will be navigated around the system, observing the completion of basic tasks whilst familiarising themselves with our product.

What will be included:

- System do's and don'ts
- System functionality
- How to search for a Client
- System Navigation
- How to update YJ records
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

An Introduction to IYSS/YJ System Admin

Intended for:

One Support Staff
Local System Administrators

Session length: 2 – 3 hours

Outline:

This course is designed to provide users with a general overview of the IYSS/YJ System Admin client, covering common aspects of system functionality for system support staff and administrators. This course is particularly useful for support staff that need to learn the basics or those who have recently changed their role. Users will be navigated around the system, observing the completion of basic tasks whilst familiarising themselves with our product.

What will be included:

- System do's and don'ts
- System functionality
- System Values
- Scheduled Jobs
- Users & Security
- Configuring Lookups
- Reporting
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Getting the best out of YJ

Intended for:

One Support Staff
Local System Administrators
One YJ Service Managers
One YJ Team Members

Session length: 2 – 3 hours

Outline:

This course is designed to show users how to get the best out of One YJ. Users will be shown how to utilise advanced features within One YJ and configure the system locally to best suit the needs of the service whilst adhering to the YJB requirements. The session will involve aspects of the frontend and the YJ System Admin client, familiarity of both are beneficial but not essential.

What will be included:

- My Homepage
- Caseload Management
- Lookup Configuration
- Characteristics
- Breach Process
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Out of Court / Court Inputting & Interventions

Intended for:

One YJ Service Managers
One YJ Team Members

Session length: 2 – 3 hours

Outline:

This course is designed to provide users with a general overview of court and out-of-court inputting in YJ covering common aspects of system functionality for frontend users. This course is particularly useful for administrative staff or temporary staff that need to learn the basics. Users will be navigated around the system, observing the completion of basic tasks whilst familiarising themselves with our product.

What will be included:

- System do's and don'ts
- System functionality
- Offences
- Pre-Court Decisions
- Court Appearances
- Adjournments & Sentencing
- Report Requests
- Interventions
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

An Introduction to ASSETPlus

Intended for:

One YJ Service Managers
One YJ Team Members

Session length: 2 – 3 hours

Outline:

This course is designed to provide users with a general overview of ASSETPlus in YJ covering common aspects of system functionality for frontend users. This course is particularly useful for new staff or students on placement that need to learn the basics. Users will be navigated around the system, observing the completion of basic tasks whilst familiarising themselves with our product.

What will be included:

- System do's and don'ts
- System functionality
- Offences & Outcomes
- ASSETPlus Assessment
- Episodes
- Countersignature
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Victim Recording

Intended for:

One Support Staff
Local System Administrators
One YJ Service Managers
One YJ Team Members
Victim Support Staff

Session length: 2 – 3 hours

Outline:

This course is designed to provide users with an overview of the victim recording options available in One YJ covering common aspects of system functionality for specific users. This course is designed for victim support staff and their managers. Users will be navigated around the system, observing the completion of basic tasks whilst familiarising themselves with our product.

What will be included:

- Victim Recording Process
- Victim Reporting
- Victim Permissions
- Creating a victim
- Searching for a victim
- Anonymising victim records
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Parent Recording

Intended for:

One Support Staff
Local System Administrators
One YJ Service Managers
One YJ Team Members
Parenting Support Staff

Session length: 2 – 3 hours

Outline:

This course is designed to provide users with an overview of the parent recording options available in One YJ covering common aspects of system functionality for specific users. This course is designed for parenting workers, support staff and their managers. Users will be navigated around the system, observing the completion of basic tasks whilst familiarising themselves with our product.

What will be included:

- Parent Recording Process
- Parent Permissions
- Creating a Parent
- Searching for a Parent
- One & YJ shared data
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Managing Events & YJ Breach Process

Intended for:

One Support Staff
Local System Administrators
One YJ Service Managers
One YJ Team Members

Session length: 1 – 2 hours

Outline:

This course provides users with an overview of the YJ Events and Breach functionality. This session is beneficial to sites who would like to review their current setup/options and understand the capabilities and additional features of this function. The session will involve aspects of the frontend and the YJ System Admin client, familiarity of both are beneficial but not essential.

What will be included:

- System do's and don'ts
- System functionality
- Client Events
- Breach Process
- Parent Events
- Victim Events
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

YJB Quarterly Returns

Intended for:

One Support Staff
Local System Administrators
Local Report Writers
One YJ Service Managers
One YJ Team Members

Session length: 2 – 3 hours

Outline:

This course is essential for anyone responsible for the generation of the YJB quarterly submissions. During this course participants will explore the process involved with the completion of this statutory reporting requirement and the associated components. The session will involve aspects of the frontend and the YJ System Admin client, familiarity of both are beneficial but not essential.

What will you learn?

- Prerequisites
- YJB Counting Rules
- Submitting the DX Job
- Connectivity
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers

Case Transfers

Intended for:

One Support Staff
Local System Administrators
One YJ Service Managers
One YJ Team Members

Session length: 2 – 3 hours

Outline:

This course is designed to provide users with a general overview of the Case Transfer functionality in One YJ covering common aspects of system functionality for frontend users. During this course participants will explore the process involved with the completion of this new functionality and the associated components. The session will involve aspects of the frontend and the YJ System Admin client, familiarity of both are beneficial but not essential.

What will you learn?

- Prerequisites
- Case Transfer Process
- Permissions
- Homepage panels
- Sending a Transfer request
- Receiving a Transfer request
- Q&A/Workshop – Time to ask the consultant queries specific to your Local Authority and for the consultant to share good practice from our experience with other customers