**Functional Requirements**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Reference | Priority | Title | Requirement Description | System Owner |
| HLFR001 | Must | Web Portal | A mechanism/ functionality that acts a single point for managing the configuration for the incoming data, and for external users to upload data | Capita One and SIMS |
| HLFR002 | Must | Login | Users must have a username and password to gain access into the system  Assumption   * Users can only access specific areas of the system | Capita One and SIMS |
| HLFR003 | Must | Module Bar | A menu bar enabling a user to select an option they wish to navigate to.  The option will include all the modules applicable to individual councils across both SIMS and Capita One   1. Admission and Transfer 2. Attendance 3. Behaviour Management 4. File Storage 5. School Communications 6. Dinner Money 7. SIMS Financial Management System (FMS) 8. Safeguarding 9. Timetable 10. Additional Learning Needs 11. Bases 12. Bases to Bases (B2B) 13. Address Manager 14. Geographical Information System (GIS) 15. Pulse 16. Transport – (including SEN VM & RAVA) 17. Music 18. Grants and Benefits 19. Special Education Needs (SEN) 20. Children Support Service (CSS) 21. Insight 22. Child Profiling Tool 23. Exclusion 24. Governors 25. Intervention 26. Child Employment   Assumption   * Solution must be scalable to accommodate additional modules in the future if needed * User will only see the modules that is applicable to them | SIMS and Capita One |
| HLFR004 | Must | Admission and Transfer | The solution must have a module which will enable users including parents to capture admission of intending pupil  This module will also capture details of transfer of pupil from one school to another  Note: Details of fields to the completed including mandatory fields still to be defined | SIMS and Capita One |
| HLFR005 | Must | Capture Pupil Information | The system must provide a user interface to input and maintain user details.  Attributes required include, but are not limited to:   * First and Last name * School * Address * Date of Birth * Gender etc   Assumption  It is assumed that parents could provide the aforementioned information on the council’s website | SIMS |
| HLFR006 | Must | Edit Information | The solution must allow users to easily edit, and update captured detail of pupil on demand  Assumption   * As above it is assumed that parents could edit pupil’s information on the council’s website | SIMS |
| HLFR007 | Must | View Pupil Information | The solution must allow users with appropriate access to view pupil information in the following formats: - PDF, Word, etc | SIMS and Capita One |
| HLFR008 | Must | Unique Reference Number | The solution must assign a unique number to pupil when they create, they create a new profile. This could be a combination of characters and numbers | SIMS |
| HLFR009 | Must | Attendance | The solution must have a functionality that enables users to capture and manage school pupil’s attendance  Note: Criteria still to be defined | SIMS and Capita One |
| HLFR010 | Must | Behaviour Management | The solution must have a functionality that enables users to capture and manage the performance of pupils.  Criteria to enable pupil’s performance still to be defined  Note: Criteria still to be defined | SIMS |
| HLFR011 | Must | File Storage | The solution must have an area in the system that allows users to all letters and correspondence sent to parents  Note: specific files to be stored including retention period still to be defined | SIMS |
| HLFR012 | Must | School Communications | A functionality that enables parent to manage and pay for dinner, clubs, uniform etc  This module integrates with cashless catering systems for e.g. Dinner money below | SIMS |
| HLFR013 | Must | Dinner Money | A functionality that allows users for e.g. teachers, school administrator, canteen staff and parents to manage pupil’s meal including dietary needs and subsequent payment via School Comms | SIMS |
| HLFR014 | Must | SIMS Financial Management System (FMS) | The solution must have a module that provides an overview and up to date finances for schools to enable management staff to manage school budget and resources  Note: Criteria still to be defined | SIMS |
| HLFR015 | Must | Safeguarding | The solution must have a functionality that enables users to record and manage any concerns regarding a pupil  Note: Criteria still to be defined | SIMS |
| HLFR016 | Must | Timetable | The solution must have a module that enables users to create and manage timetable effectively, easily allocate students to classes and optimise school’s resources and facilities  Assumption   * This module is limited to secondary schools | SIMS |
| HLFR017 | Must | Additional Learning needs | A functionality used to manage pupils with learning needs detailing their care plan, contacts, welfare information etc | SIMS |
| HLFR018 | Must | Bases 2 Bases (B2B) | This functionality enables auto data collection from school’s management information systems to the database i.e., SIMS to Capita One  See processing requirements below | SIMS and Capita One |
| Processing Requirements | | | | |
| HLFR019 | Must | Bulk Upload | The solution must have the functionality that allows bulk import of data from one student management system to council database i.e. from SIMS to Capita One | Capita One |
| HLFR020 | Must | Bulk Upload errors | The solution will provide a functionality that enable any errors that resulted from bulk upload to be highlighted for users to take remedial actions | Capita One |
| HLFR021 | Must | Receive File (Capita One Holding Area) | The solution should have the ability to receive files from partner organisations.  This will enable data files to be received into the system and allow data to be stored temporarily prior to processing i.e. validation, conversion etc  Assumption   * Assume that the solution will have the ability to receive files in any formats for e.g. csv, xml, xls * Assume that holding area will have a queuing capability | Capita One |
| HLFR022 | Must | File Validation | The solution should have a functionality that enables validation of files received in the system holding area. This is to ensure that only files in the acceptable format are allowed into the system  Note: Validation criteria still to be defined and agreed | Capita One |
| HLFR023 | Must | File Validation Error Management | The solution will have a functionality that enables error rates to be configurable for instance, an acceptable error rate might be set at 5%  Assumption   * Assume that error rates are set to different rates for each council * Assume that staff can set these rates with degree of flexibility to encourage continuous improvement in error reduction * Assume that error codes will be assigned to respective errors. Error codes still TBD * Assume that there would be a manual/override function to allow staff to push the file through | Capita One |
| HLFR024 | Must | Matching | The solution should have the ability to match with individual records against information held within the council database based on matching criteria.  These criteria should be easily modified going forward as new data is possibly received (i.e. first name, last name, D.O.B etc) | Capita One |
| HLFR025 | Must | Address Manager | A functionality that enables users to maintain and manage pupils address information.  Assumption   * Assume that parent can access and update pupil’s addresses | SIMS |
| HLFR026 | Must | Geographical Information System (GIS) | The solution must have a functionality that provides maps and calculates route distance from pupil’s resident address to school. This includes safe walking and safe driving routes. | Capita One |
| HLFR027 | Must | Pulse | Functionality used to record and capture all types of pupil performance and results.  Assumption   * Assume that this module is only applicable to secondary schools | Capita One |
| HLFR028 | Must | Transport | The solution must have a functionality for mainstream, special needs, journey and fleet management.  There are currently two add-ons associated with transport module which includes:   * RAVA (Route and vehicle allocation) – used to optimize routes to schools including available vehicles for students with entitlement to home -to-school transport. * SEN VM (Special Education Need Vehicle Management) – route optimization tool for SEN passengers. | Capita One and SIMS |
| HLFR029 | Must | Music | Solution must have a functionality that enables users to record and manage information of pupils that are in receipt of music tuition as well as music instrument information.  Note: Criteria still to be defined | Capita one and SIMS |
| HLFR030 | Must | Grants and Benefits | A solution to manage application and subsequently payment of school uniform and free school meals to eligible pupils.  Note: Criteria still to be defined | Capita One |
| HLFR031 | Must | Special Education Needs (SEN) | A solution to support pupils with special education needs and its associated processes i.e., panels and annual reviews, support collaborative working and co-production. These information are shared between all parties involved with SEN pupil i.e., families, professionals, schools etc.  Note: Criteria still to be defined | Capita One and SIMS |
| HLFR032 | Must | Children Support Service (CSS) | A functionality that allows users to record activities and improvements for specific cohorts of pupils.  The following add-ons are associated with CSS modules.   * Inclusion Progression * Behavior Support Team * English as other language (EAL) * Education Psychology Service * LAC Support Service * SEN involvements * Inspire * NEWSSS * Managed Moves * EWOs * CLASS | Capita One |
| HLFR033 | Must | Insight | Functionality that enables real time SSRS and Power BI Report sharing with external partners i.e., schools  See reporting requirements below | Capita One |
| HLFR034 | Must | Child Profiling Tool | The solution must have a functionality that enables users to record and manage early identification of pupil at the risk of negative outcome. | Capita One |
| HLFR035 | Must | Exclusion | A functionality used to manage pupil’s exclusion including start and end date, exclusion type etc.  Note: Further Criteria still to be defined | Capita One and SIMS |
| HLFR036 | Must | Governors | The solution must have a functionality that enable users for e.g., school clerks to self-serve, Governor appointments, positions, appeals, training, DBS checks, vacancy update routines and meetings | Capita One |
|  | Must | Intervention | The solution must have a functionality that enable users to track underperforming students in order to allocate the right support and resources including tracking improvements | SIMS |
|  | Must | Child Employment | The solution must have a functionality that enables employers of school aged children to apply for a child work permit for any child who works for them | Capita One |
| HLFR037 | Must | User profiles | The system must have a functionality to capture variety of user profiles with permission levels to selected data and components of the system  The permissions levels should include the following: -   * System Administrators - with the appropriate privileges to edit, remove and configure everything within the system * Users – teachers and council employees with specific privileges in areas of the system * Parents - with the ability to update their information | SIMS and Capita One |
| HLFR038 |  | User Access | The solution should have a functionality that allows an authorised user (site administrator) to do the following: -     * Add a new user using a secure process * Modify an existing user * Unlock an account | SIMS and Capita One |
| HLFR039 | Must | Search | The solution must have a search functionality. Clicking on the ‘Search’ link will take a user to the search page where they can search against a number of criteria (TBD) | SIMS and Capita One |
| HLFR040 | Must | Guides Page | The system will have a functionality that will enable and guide users through the system | SIMS and Capita One |
| HLFR041 | Must | Discussion board | The solution must have a functionality that allows the site users to create a discussion providing a title, message and indicate whether they are asking a question.  Discussion description allows a rich-text editor and also, a facility to insert objects such as tables, pictures, videos, links, and files. | SIMS and Capita One |
| HLFR042 | Must | News Page | The system should have a functionality that provides users with information on:   * Upcoming Events * Welcome message (static) * Council related news etc | SIMS and Capita One |
| HLFR043 | Must | Full Audit Functionality | The solution must have a functionality that captures details based on use, location, etc. and should be in a real-time customisable dashboard system with restricted access options. | SIMS and Capita One |
| HLFR044 | Should | Data File Refresh/Update | The solution should have the ability to refresh data daily to ensure that reports are as up to date as possible so that business decisions can be backed up by reliable and timely information. | SIMS and Capita One |
| **Reporting Requirements – the following reports have been currently identified however the solution must be scalable and flexible enough to accommodate future reporting requirements** | | | | |
| HLFR045 | Must | Report Analysis Tool | The solution should have a functionality that enables a self-service reporting tool. This will enable partners to produce bespoke reports that are meaningful and tailored to their needs. | SIMS and Capita One |
| HLFR046 | Must | Create Reports | Ability to create any number of reports to be created and amended by an authorised administrator at any time. It should be simple to use and intuitive, preferably with drag and drop capability allowing easy construction of reports from data lists  The report functionality should allow for export to .xls, PDF, excel and .csv files as they may be required to upload to other applications or systems.  No specialist knowledge should be required to create these reports i.e. no ‘SQL’ coding interface | SIMS and Capita One |
| HLFR047 | Should | Mobile friendly reports | The solution should enable mobile friendly reporting so that reports could be accessed whilst users are on the go. This functionality would allow all reports accessible on the desktop computer to be equally accessed on mobile smart devices including tablets. | SIMS and Capita One |
| HLFR048 | Must | Integrated Dashboards | The solution must allow users to view manipulate and review analysed data through the use of interactive dashboards.  These should be represented visually in the form of graphs, tables, charts etc | Capita One and SIMS |
| HLFR049 | Must | Dashboards – View and Download | The solution will allow authorised user to view and/or download aggregated reports in a graphical dashboard with respect to their individual school and council  Note: Parameters still to be decided | SIMS and Capita One |
| HLFR050 | Must | Export Reports | The solution should have the ability to incorporate self-service field menu. This will enable users to create, download and/or export custom reports | SIMS and Capita One |
| HLFR051 | Must | Wales Statutory Reports | The solution must feed into the official statutory wales report which allows users to view, create and download data.  Note: Specific area to be reported are still to be defined | SIMS and Capita One |