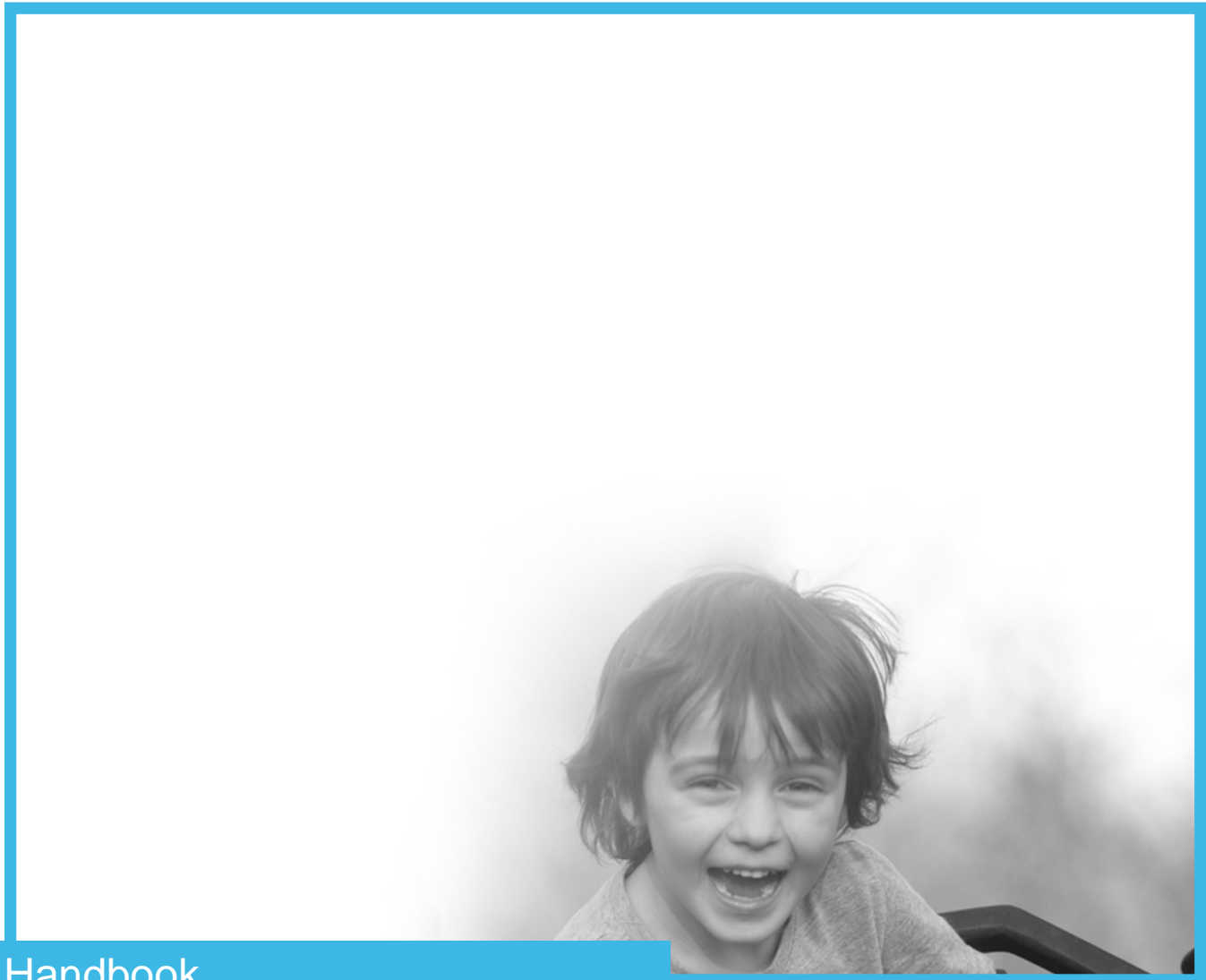


# CAPITA

## Timeline Data Transfer



Handbook

one

## Revision History

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# Timeline Data Transfer

## Introduction

Timelines reporting data, which used to be transferred automatically to the Oracle tables each time an activity was completed or skipped in the client, is now transferred using a scheduled task. Capita One recommends you run the transfer task twice daily at 1 a.m. and 1 p.m.

Although the default is to use a scheduled task to transfer timeline reporting data, you can configure One to transfer this information each time an activity is completed or skipped. Please see **Setting the Status of the Timeline Data Transfer Facility** for more information.

Please note, completed timeline activities continue to be saved in real time when saving from v4 Client and v4 Online. This change does not mean that completed or skipped timeline activities are only saved periodically. However, some of the reporting data associated with a completed or skipped timeline activity is saved on a scheduled basis rather than continuously.

The routine copies existing v4 timeline data from the SQL database to the Oracle database. In addition, it automatically stores any timelines, which are associated to an involvement form, in both the SQL database and the Oracle database when the involvement form is saved.

The activity status is shown correctly in the timeline itself, but if you produce reports, the data may show a different status than that shown on the timeline, depending on the time at which the reporting data was last saved to the Oracle database.

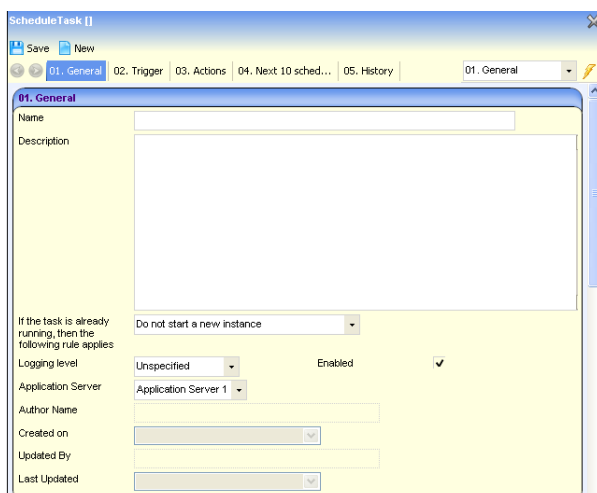
## Setting the Status of the Timeline Data Transfer Facility

The setting TIMELINEDATATRANSFER found within Application.ini, is set by Capita to FALSE. If you prefer synchronised data over faster performance, you can change this setting to TRUE via the Configuration Management tool. The global setting overrides any individual client settings.

## Creating the Scheduled Task to Transfer Timelines Reporting Data

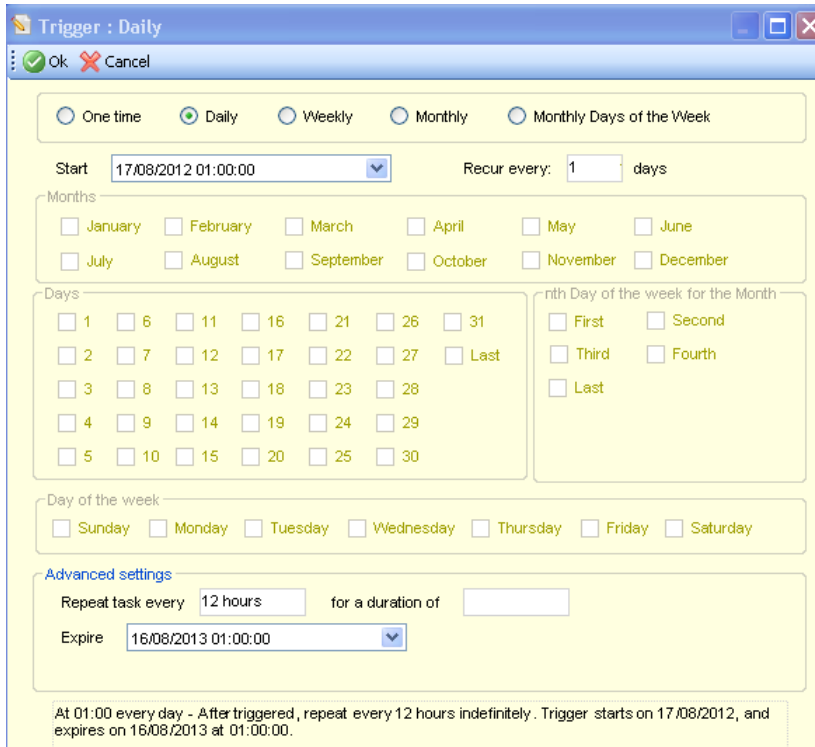
If you leave the setting TIMELINEDATATRANSFER as FALSE, then you must create a scheduled task that transfers the data periodically (unless you never want to report on Timelines). Capita have created the task to be used, but each LA must set this task up for themselves.

1. In the v4 Client, select **Tools | Administration | Schedule Task** to display the **Schedule Task** page.

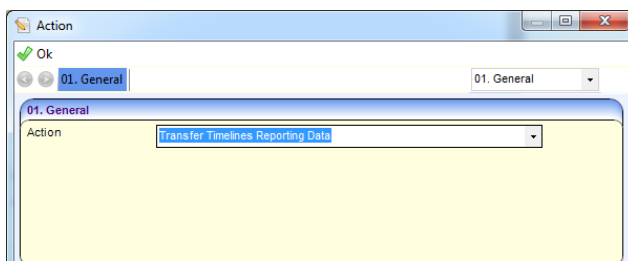


## Workflow Management

2. Click the **New** button.
3. Enter a **Name** (e.g. Transfer Timelines Reporting Data).
4. Enter a **Description**.
5. Ensure the **If the task is already running, then the following rule applies** drop-down list is set to **Do not start a new instance**.
6. In the **Trigger** panel, click the **Add** button to display the **Trigger** dialog.



7. Select the **Daily** radio button.
8. From the **Start** drop-down list, select the date and time at which you want the task to start.
9. Ensure the **Recur** every field is set to 1 days.
10. In the **Advanced** settings area, enter 12 hours in the **Repeat Task every** field.
11. Select an **Expire** date and time.
12. Click the **OK** button to close the dialog.
13. In the **Actions** panel, click the **Add** button to display the **Action** dialog.



14. From the **Action** drop-down list, select your task e.g. Transfer Timelines Reporting Data.
15. Click the **OK** button.
16. Click the **Save** button.

## Timeline Data Transfer

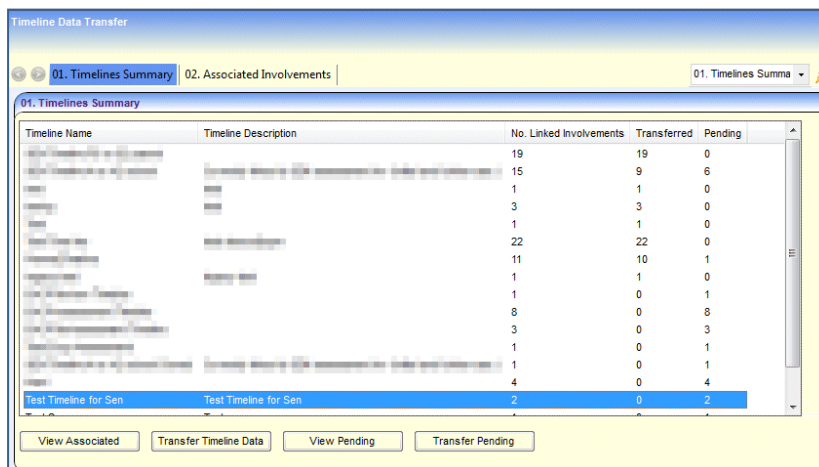
## Running the Timelines Data Transfer Routine

The timelines data transfer routine moves any pre-existing active v4 timeline information currently stored in the SQL database to the Oracle database. For active timelines that are running, users can choose to transfer data for any number of timelines.

**NOTE:** This process can be run as often as requested and One moves the whole snapshot of timeline data each time; it will not simply move a snapshot of data from the last time this process was run.

To run the **Timelines Data Transfer** routine:

1. In the v4 Client, select **Tools | Administration | Timeline Data Transfer** to display the **Timeline Data Transfer** page.



2. Select a timeline listed in the **Timeline Summary** panel and click the **View Associated** button. The involvements that are associated with the timeline are displayed below in the **Associated Involvements** panel.

Subject	Involvement Form	Status	Reason	Start Date	End Date	Case File	Case Status	Service Team	Transferred	Transfer status	Transfer Type
									Yes	Data last tran...	Created
									Yes	Data last tran...	Created
									Yes	Data last tran...	Created
									Yes	Data last tran...	Created
									Yes	Data last tran...	Created
									Yes	Data last tran...	Created
									Yes	Data last tran...	Created
									No	New Timeline...	Created
									No	New Timeline...	Created
									No	New Timeline...	Created
									Yes	Data last tran...	Created
									No	Data has not ...	Created
									No	New Timeline...	Created
									No	New Timeline...	Created

Timelines associated to an involvement form are automatically stored in both the SQL database and the Oracle database.

3. Select one or more timelines and click the **Transfer Timeline Data** button; this transfers the data stored in the SQL database to the Oracle database.

Any timelines that have already been associated to an involvement form and have been completed will not be included in the timeline data transfer.

## Timeline Reporting

As a result of timeline information being stored in the Oracle database, it is possible for users to report on v4 timeline information using Crystal Reports.

### Database Table Structure

There are two main tables created to hold the whole timeline data:

- TIMELINE\_ACTIVITY
- TIMELINE\_ACTIVITY\_PROPERTY

The data held within these two tables constructs the whole timeline workflow.

### TIMELINE\_ACTIVITY

This table holds the snapshot of all timeline activities.

**NOTE:** This table includes system generated workflow activities as well - which are not visible in the user interface.

Column Name	Type	Nullable	Default	Comments
TIMELINE_ACTIVITY_ID	NUMBER(10)			Primary Key
PARENT_TIMELINE_ACTIVITY_ID	NUMBER(10)	Y		Numeric Parent ID Link
TIMELINE_ID	NUMBER(10)	Y		Reference to the Involvement Timeline
WORKFLOW_GUID	VARCHAR2(36)			Workflow Instance Identifier
PARENT_ACTIVITY_INDEX	VARCHAR2(2000)			Parent Tree Index based on 1.0.1.2 syntax
ACTIVITY_INDEX	VARCHAR2(2000)			Activity Tree Index based on 1.0.1.2 syntax
ACTIVITY_TYPE	VARCHAR2(2000)	Y		Activity Type
QUALIFIED_NAME	VARCHAR2(512)	Y		Qualified Name
DESCRIPTION	VARCHAR2(2000)	Y		Description
STATUS	VARCHAR2(64)	Y		Status
EXECUTION_STATUS	VARCHAR2(64)	Y		Execution Status
EXECUTION_RESULT	VARCHAR2(64)	Y		Execution Result
ENABLED	NUMBER(1)	Y		
CHILD_ACTIVITY_COUNT	NUMBER(4)	Y		Count of Child Activities for the activity
CREATED_DATE	DATE	Y	sysdate	Date created

## TIMELINE\_ACTIVITY\_PROPERTY

This table holds the property values for all timeline activities.

Column Name	Type	Nullable	Default	Comments
TIMELINE_ACTIVITY_PROPERTY_ID	NUMBER(10)			Primary Key
TIMELINE_ACTIVITY_ID	NUMBER(10)	Y		Reference to the Timeline Activity record
PROPERTY_NAME	VARCHAR2(64)	Y		Name of property
PROPERTY_VALUE	VARCHAR2(2000)	Y		Value of Property
PROPERTY_TYPE	VARCHAR2(2000)	Y		Property Type
CREATED_DATE	DATE	Y	Sysdate	Date created

## Views

The following views are a set of Oracle views created to assist with timeline reporting. These views hold the timeline snapshot, as is visible on the screen (e.g. the **Launch Timeline** button on an Involvement form).

- V\_TIMELINE\_TREE
- V\_TIMELINE\_ACTIVITY
- V\_TIMELINE\_CORRESPOND\_ACTIVITY
- V\_TIMELINE\_LETTER\_ACTIVITY
- V\_TIMELINE\_LIMIT\_ACTIVITY
- V\_TIMELINE\_BRANCHED\_ACTIVITY
- V\_TIMELINE\_PARALLEL\_ACTIVITY

## V\_TIMELINE\_TREE

This is the base line view which holds all the details of timeline activities and their most common properties.

Column Name	Type	Comments
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description in hierarchal order.
TITLE	VARCHAR2(2000)	Title
WARNING_DATE	DATE	Warning Date
TARGET_DATE	DATE	Target Date
STATUS	VARCHAR2(64)	Status
ACTIVITY_TYPE	VARCHAR2(2000)	Activity Type
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID
PARENT_TIMELINE_ACTIVITY_ID	NUMBER(10)	Parent Activity ID



**Workflow Management**

ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index
TIMELINE_ID	NUMBER(10)	Timeline ID
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID
INVOLVEMENT_ID	NUMBER(10)	Involvement ID

The following SELECT statement from this table will give a list of all activities in hierarchal order:  
 SELECT \* FROM V\_TIMELINE\_TREE T ORDER BY T.ACTIVITY\_INDEX;

ACTIVITY_DESCRIPTION	TITLE	WARNING_DATE	TARGET_DATE	STATUS	ACTIVITY_TYPE
Notify Parents - Due Date: 13/04/2010	Notify Parents	13/04/2010 00:00:00	13/04/2010 00:00:00	Complete	CSSCorresponde
Parent - Parent Notification				Skipped	CSSLetterActivi
SEN Assessment Limit - Start Date: 13/04/2010 - Limit Date: 12/05/2010	SEN Assessm		12/10/2010 00:00:00	InProgress	CSSLimitedSeque
Decision to Assess Limit - Start Date: 13/04/2010 - Limit Date: 25/05/2010	Decision to At		25/05/2010 00:00:00	Complete	CSSLimitedSeque
Parental Views Time Limit   Assessment Panel Meeting - Warning Date: 28/04/2010	Parental View			Complete	CSSParallelActivit
Parental Views Time Limit - Warning Date: 12/05/2010	Parental View	12/05/2010 00:00:00	12/05/2010 00:00:00	Complete	CSSActivityWithW
Assessment Panel Meeting - Warning Date: 28/04/2010	Assessment F	28/04/2010 00:00:00	12/05/2010 00:00:00	Complete	CSSActivityWithW
Assessment Panel Decision - Warning Date: 19/04/2010	Assessment F	19/04/2010 00:00:00	26/04/2010 00:00:00	Complete	CSSBranchedActi
Seek Advice - Start Date: 13/04/2010 - Limit Date: 22/06/2010	Seek Advice		22/06/2010 15:25:00	InProgress	CSSLimitedSeque
LEA Seek Advice - Start Date: 13/04/2010 - Limit Date: 25/05/2010	LEA Seek Ad		25/05/2010 15:25:00	InProgress	CSSLimitedSeque
Request SEN Advice - Due Date: 13/04/2010	Request SEN	13/04/2010 15:25:00	13/04/2010 15:25:00	Complete	CSSCorresponde
Inv - Ed Psychologist - Request Advice				Skipped	CSSLetterActivi
Medical Officer - Request Advice				Skipped	CSSLetterActivi
Base - Headteacher - Request Advice				Skipped	CSSLetterActivi
Social Services - Request Advice				Skipped	CSSLetterActivi
Others - Request Advice				Skipped	CSSLetterActivi
All Advice Received - Warning Date: 18/05/2010	All Advice Re	18/05/2010 15:25:00	25/05/2010 15:25:00	InProgress	CSSActivityWithW
Statement Panel Meeting - Warning Date: 08/06/2010	Statement Par	08/06/2010 15:25:00	22/06/2010 15:25:00	NotStarted	CSSActivityWithW
Statement Decision Limit - Start Date: 22/06/2010 - Limit Date: 06/07/2010	Statement De		06/07/2010 15:25:00	NotStarted	CSSLimitedSeque
Issue Draft/Proposed Statement or Note for Issue Draft/Pr	Issue Draft/Pr			NotStarted	BranchedActivi
Issue Draft/Proposed Statement or Note for Issue Draft/Pr	Issue Draft/Pr	29/06/2010 15:25:00	06/07/2010 15:25:00	NotStarted	CSSCorresponde
Parent - Draft Statement or Note for Issue Draft/Pr	Parent - Draft			NotStarted	CSSLetterActivi
Issue Note In Issue - Warning Date: 29/06/2010	Issue Note In I	29/06/2010 15:25:00	06/07/2010 15:25:00	NotStarted	CSSLimitedSeque

ACTIVITY\_DESCRIPTION is displayed in hierarchal order as it is seen on the above graphic.

**V\_TIMELINE\_ACTIVITY**

This view holds the additional properties of a generic timeline activity.

Column Name	Type	Comments
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From V_TIMELINE_TREE
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index – From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
TITLE	VARCHAR2(2000)	Title - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From V_TIMELINE_TREE
WARNING_DATE	DATE	Warning DATE - From V_TIMELINE_TREE
WARNINGDAYS	NUMBER	Warning Days
WARNINGDAY_TYPE	VARCHAR2(2000)	Warning Day Type
WARNING_MESSAGE	VARCHAR2(2000)	Warning Message

**Timeline Data Transfer**

WARNING_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Warning Message Assignee
TARGET_DATE	DATE	Target Date - From V_TIMELINE_TREE
TARGETDAYS	NUMBER	Target Days
TARGETDAY_TYPE	VARCHAR2(2000)	Target Day Type
TARGET_MESSAGE	VARCHAR2(2000)	Target Message
TARGET_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Target Message Assignee
WORKINGDAYBASE	VARCHAR2(2000)	Working Day Base
END_DATE	DATE	End Date
LINKED_FIELD	VARCHAR2(2000)	Linked Field

### V\_TIMELINE\_CORRESPOND\_ACTIVITY

This view holds the additional properties of a correspondence activity within a timeline.

Column Name	Type	Comments
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From V_TIMELINE_TREE
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index – From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
TITLE	VARCHAR2(2000)	Title - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From V_TIMELINE_TREE
WARNING_DATE	DATE	Warning Date - From V_TIMELINE_TREE
TARGET_DATE	DATE	Target Date - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Status - From V_TIMELINE_TREE
WARNINGDAYS	NUMBER	Warning Days
WARNINGDAY_TYPE	VARCHAR2(2000)	Warning Day Type
WARNING_MESSAGE	VARCHAR2(2000)	Warning Message
WARNING_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Warning Message Assignee
TARGETDAYS	NUMBER	Target Days

**Workflow Management**

TARGETDAY_TYPE	VARCHAR2(2000)	Target Day Type
TARGET_MESSAGE	VARCHAR2(2000)	Target Message
TARGET_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Target Message Assignee
END_DATE	DATE	End Date

**V\_TIMELINE\_LETTER\_ACTIVITY**

This view holds the additional properties of a letter activity within a timeline.

Column Name	Type	Comments
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From V_TIMELINE_TREE
PARENT_TIMELINE_ACTIVITY_ID	NUMBER(10)	Parent ID to identify parent Corresp. Activity
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index – From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
RECIPIENT_ROLE_CODE	VARCHAR2(2000)	Recipient Role Code
RECIPIENT_ROLE_DESCRIPTION	VARCHAR2(2000)	Recipient Role Description
ISRESPONSEREQUIRED	VARCHAR2(2000)	Is Response Required
REPORTTEMPLATE	VARCHAR2(2000)	Report Template
REMINDER1_NODAYS	NUMBER	Reminder 1 – No of days
REMINDER1_REPORTTEMPLATE	VARCHAR2(2000)	Reminder 1 – Report Template
REMINDER2_NODAYS	NUMBER	Reminder 2 – No of days
REMINDER2_REPORTTEMPLATE	VARCHAR2(2000)	Reminder 1 – Report Template
GENERATED_DATE	DATE	Letter generated date
COMPLETED_DATE	DATE	Completed Date
REMINDER1_DATEGENERATED	DATE	Reminder 1 – Date generated
REMINDER2_DATEGENERATED	DATE	Reminder 2 – Date generated
LINKED_FIELD	VARCHAR2(2000)	Linked Field

**Timeline Data Transfer**

**V\_TIMELINE\_LIMIT\_ACTIVITY**

This view holds the additional properties of a limit activity within a timeline.

<b>Column Name</b>	<b>Type</b>	<b>Comments</b>
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index – From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From
TITLE	VARCHAR2(4000)	Title - From V_TIMELINE_TREE
TARGET_DATE	DATE	Target Date
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From
LIMIT_DAYS	NUMBER	Limit Days
DAY_TYPE	VARCHAR2(2000)	Day Type
START_DATE	DATE	Start Date

**V\_TIMELINE\_BRANCHED\_ACTIVITY**

This view holds the additional properties of a branched activity within a timeline.

<b>Column Name</b>	<b>Type</b>	<b>Comments</b>
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From V_TIMELINE_TREE
PARENT_TIMELINE_ACTIVITY_ID	NUMBER(10)	Parent Activity ID - From V_TIMELINE_TREE
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index - From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
TITLE	VARCHAR2(2000)	Title - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From V_TIMELINE_TREE
CONDITION	VARCHAR2(2000)	Condition
CONDITION_CHOSEN	VARCHAR2(2000)	Chosen Condition
WARNING_DATE	DATE	Warning DATE - From V_TIMELINE_TREE
WARNINGDAYS	NUMBER	Warning Days
WARNINGDAY_TYPE	VARCHAR2(2000)	Warning Day Type
WARNING_MESSAGE	VARCHAR2(2000)	Warning Message
WARNING_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Warning Message Assignee

## **Workflow Management**

TARGET_DATE	DATE	Target Date - From V_TIMELINE_TREE
TARGETDAYS	NUMBER	Target Days
TARGETDAY_TYPE	VARCHAR2(2000)	Target Day Type
TARGET_MESSAGE	VARCHAR2(2000)	Target Message
TARGET_MESSAGE_ASSIGNEE	VARCHAR2(2000)	Target Message Assignee
WORKINGDAYBASE	VARCHAR2(2000)	Working Day Base
END_DATE	DATE	End Date

## **V\_TIMELINE\_PARALLEL\_ACTIVITY**

This view holds the additional properties of a parallel activity within a timeline.

<b>Column Name</b>	<b>Type</b>	<b>Comments</b>
TIMELINE_ACTIVITY_ID	NUMBER(10)	Timeline Activity ID - From V_TIMELINE_TREE
ACTIVITY_INDEX	VARCHAR2(2000)	Activity Index – From V_TIMELINE_TREE
WORKFLOW_GUID	VARCHAR2(36)	Workflow GUID - From V_TIMELINE_TREE
INVOLVEMENT_ID	NUMBER(10)	Linked Involvement ID - From V_TIMELINE_TREE
STATUS	VARCHAR2(64)	Current Status - From V_TIMELINE_TREE
TITLE	VARCHAR2(2000)	Title - From V_TIMELINE_TREE
ACTIVITY_DESCRIPTION	VARCHAR2(4000)	Activity Description - From V_TIMELINE_TREE
END_DATE	DATE	End Date