# CAPITA

# Timeline Data Transfer
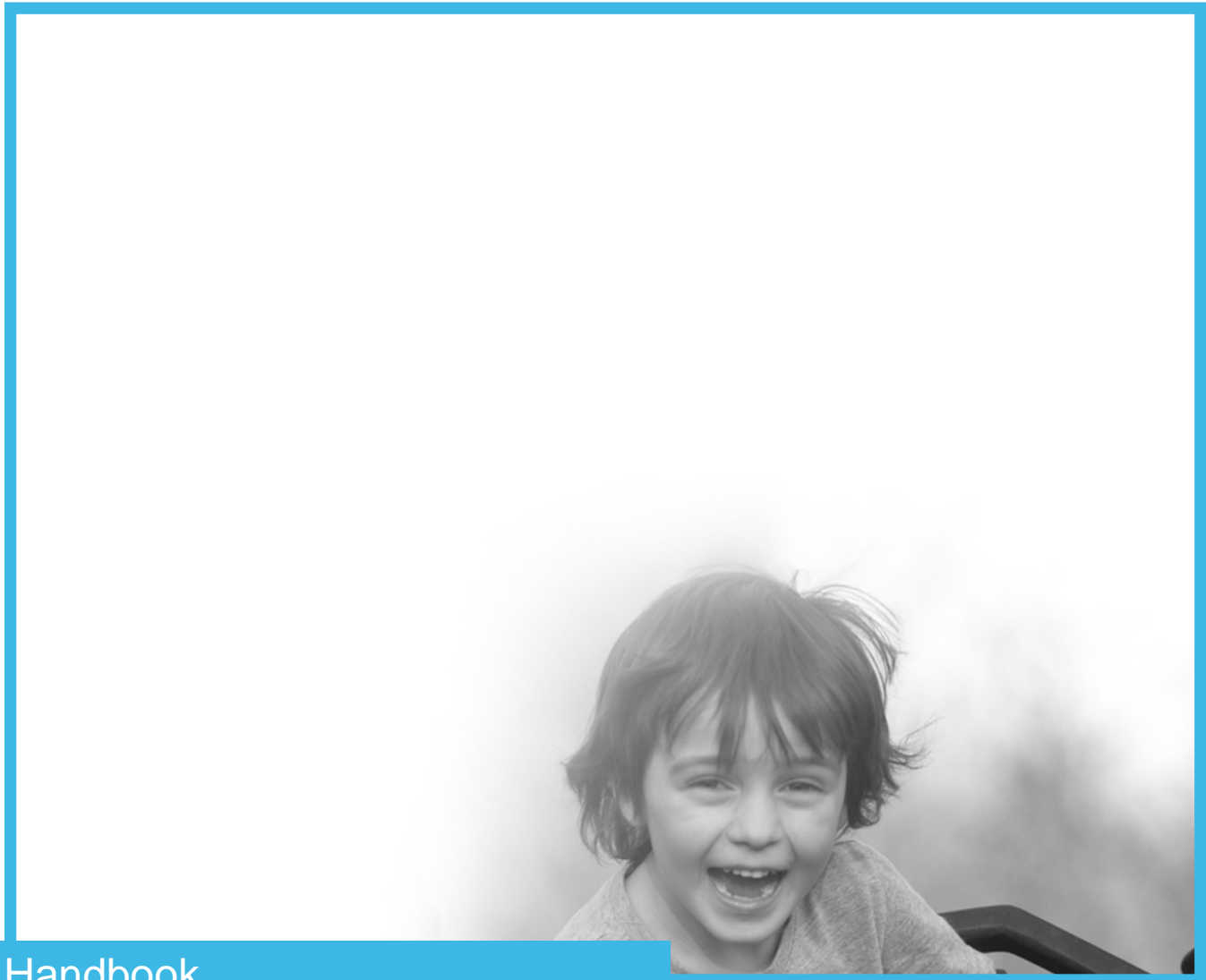
## Handbook

one

# Revision History

| Version | Published on |
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| December 2016  - 1.1 | 09/12/2016 |

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## Contacting the Service Desk

You can log a call with the Service Desk via the Web Support tool available on SupportNet.

## Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

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Please ensure that you include the document name, version and aspect of documentation on which you are commenting.

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# Contents

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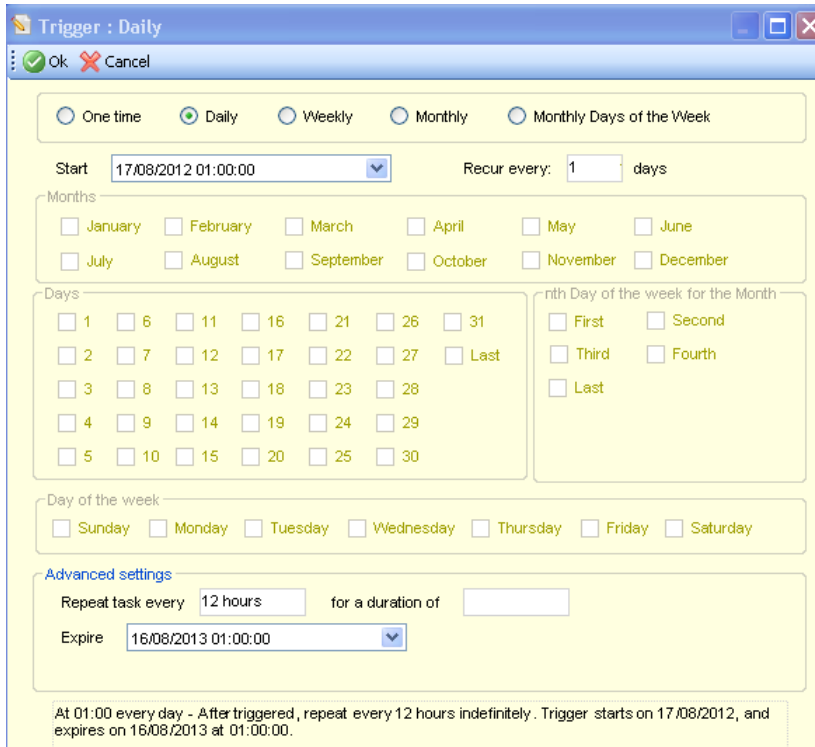
If you leave the setting TIMELINEDATATRANSFER as FALSE, then you must create a scheduled task that transfers the data periodically (unless you never want to report on Timelines). Capita have created the task to be used, but each LA must set this task up for themselves.

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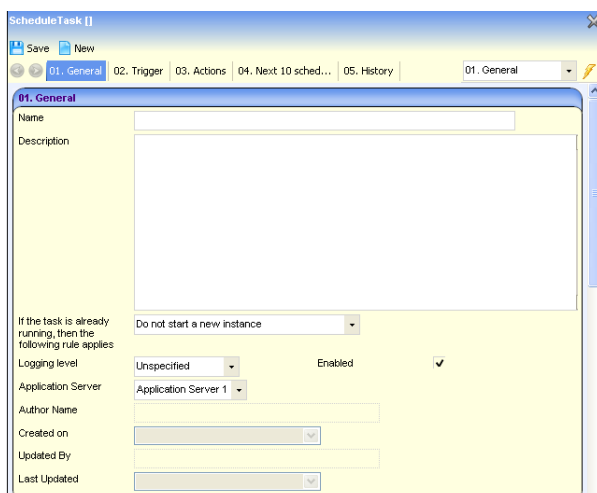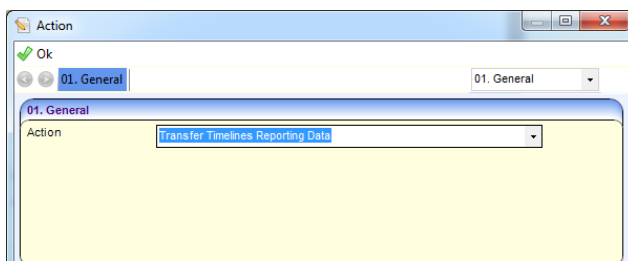
2. Click the **New** button.

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.

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# 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.
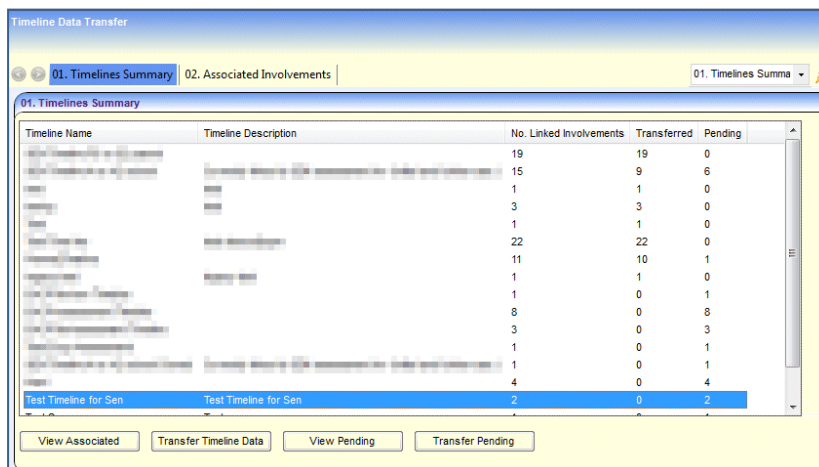


2. Select a timeline listed in the **Timeline Summary** panel and click the **View Associated** button. The involvements that are associated with the timeline are displayed below in the **Associated Involvements** panel.



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 |

| 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 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 |

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| 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 |

| | | |
|---|---|---|
| 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 |

## V_TIMELINE_LIMIT_ACTIVITY

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

| Column Name | Type | Comments |
|---|---|---|
| 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.

| Column Name | Type | Comments |
|---|---|---|
| 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 |

| 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.

| 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 |
| END_DATE | DATE | End Date |