

## Bases

last updated for the Summer 2014 release

Migration Notes



To contact the Service Desk:

Please log a case via [My Account](#)

Telephone: 0870 2411 323\*

\*Calls to 0844/0845/0870 numbers will cost three pence per minute, plus your phone company's access charge

**Please ensure that all the relevant sections are distributed to the appropriate section heads.**

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# Bases

## Introduction

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This document has been written for One Co-ordinators and Business System Administrators managing the migration of Bases v3 to v4. It describes the step by step process required to migrate from v3 and successfully start using Bases functionality in v4.

Bases v4 uses Silverlight in the web browser. A document called *Technical Guide - Installing and Configuring the CSS Online Portal.pdf* (available from [www.onepublications.com](http://www.onepublications.com)) outlines configuration requirements for Silverlight that are necessary for the v4 Bases module. The Silverlight component is deployed on the web server, therefore this will need to be considered when implementing Bases v4. The Silverlight program will need to be allowed to self-install onto client computers.

## Migration Advice

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Instructions to migrate the Bases module from v3 to v4 can be found below. The migration routine can be run in two parts; **Report Only** mode or **Migrate Live Data**. These 2 stages enable the System Administrator to test the migration process before applying it permanently. The **Report Only** option helps identify and rectify any issues prior to transferring any data. Once satisfied the System Administrator can transfer the data by running the migration process in **Migrate Live Data** mode in preparation for use in v4, this routine cannot be reversed.

**Note:** The migration routine for Bases requires exclusive use of v3 and v4 when run in **Migrate Live Data** mode. Exclusive use is not required for running the migration routine in **Report Only** mode. System Administrators are recommended to consider copying the Local Authority's live One dataset to a test instance and run the migration routines on a test instance first.

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## Steps to Migrate Bases

### Before running the Migration routine the following must be done:

1. Local Authorities must contact the One Service Desk and request for the v4 Online Bases configuration to be setup by One Technical Services.
2. Local Authorities need to obtain licence keys for Bases v4 and record them via the v3 **Launcher Screen | Tools | Licensing**.

**Note:** Before or after running the migration routine, the following must be carried out for users to access Bases in v4:

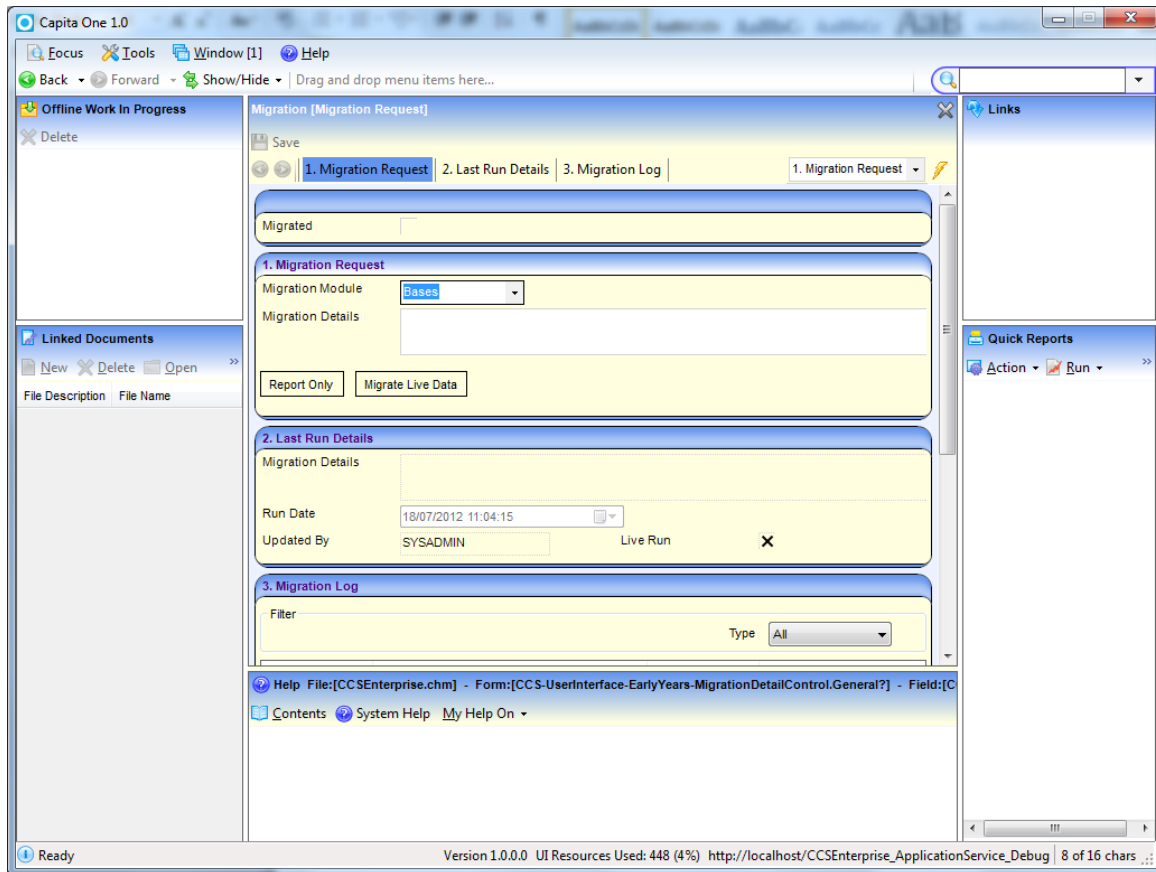
Set up User Group Permissions. Users need to be assigned permissions in the following area in order to access Bases functionality in v4 Online via **Tools | Permissions | Group Processes**

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## Running the Migration Routine:

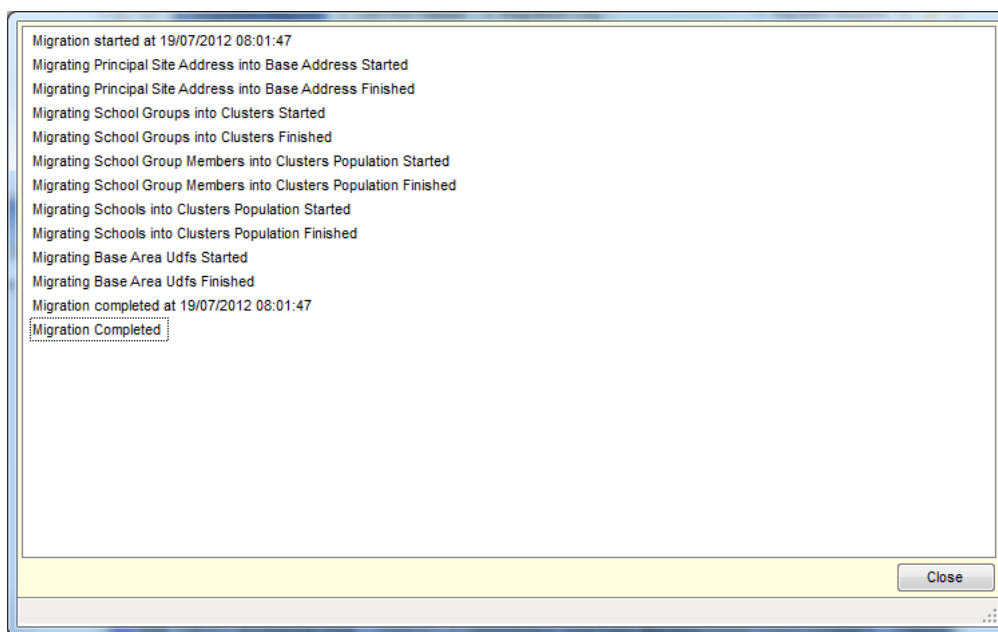
The migration routine is available in the v4 client.

1. In One v4 client, select **Tools | Migrate v3** to display the **Migration** page.
2. Select **Bases** in the **Migration Module** drop-down list. You can optionally add free text notes in the **Migration Details** field.



**Note:** The migration routine must be run in **Report Only** mode first at least once before running in **Migrate Live Data** mode.

3. Click the **Report Only** button to run a test migration. This does not require exclusive use of v3 or v4.  
Running the migration routine in **Report Only** mode runs a 'dummy' data migration process that logs details of the processes involved and identifies any migration issues if they occur. None of these changes are committed to the database. The **Migration Log** panel of the **Migration** screen displays details of the routine that has been processed.  
A **Migration Log** is generated when the migration routine is run, whether it is in **Report Only** mode or **Migrate Live Data** mode. This log contains details of how many records have been or will be successfully migrated for each of the key areas as well as listing any warning messages or errors. Each time this is run, the log created will replace the previous log.
4. Review the **Migration Log** for any errors or warnings:
5. Correct any errors highlighted in the **Migration Log** as appropriate. If there are any messages that require further explanation, send a copy of the Migration Log or seek advice from the One Service Desk (their contact details are in the **Where to go for more help** section of this document on page 11).



6. Run the migration routine in **Report Only** mode repeatedly, each time reviewing and correcting any errors listed in the Migration Log.

**Warning:** Running the migration routine in **Migrate Live Data** mode requires exclusive use of v3 and v4. Once this is run there is no option provided to roll the data back to the pre-migration state. This could only be achieved by System Administrators restoring the system from backup.

7. When ready, Clicking the **Migrate Live Data** button to display the following warning message:  
Are you sure you wish to migrate Bases? This process cannot be reversed once complete.
8. Click the **Yes** button to initiate the migration routine. Once the migration routine is complete the following message is displayed:  
The bases migration to v4 has completed successfully. This module is no longer fully accessible in v3.  
The **Migrate Live Data** option becomes disabled as this process cannot be run again.
9. Log out of One v4 and then log back in before opening up any other v4 menu routes.

## Migrated Data

As part of the migration of the module, the v4 software continues to use the same tables as the v3 module. This is to minimise the impact on existing reports and to ensure that the Base Lite functionality in One v3 continues to function correctly. However a number of data items need to be migrated to the equivalent functionality in One v4 in order for the software to function. The following areas of functionality contain data that needs to be migrated. All of these areas are included in the migration process included with the software:

1. Base\Area UDFs
2. Person UDFs
3. Linked Documents
4. Base Groups
5. Bases full v3 lookups to v4 Bases full

Database changes have been kept to a minimum so that there is less impact on the Bases module. Another reason for this is that the Base Lite functionality is also used by other modules. This reduces the risk of impacting other modules. Consideration to the database structure has been put in place to accommodate the changes taking place such as schools becoming academies. Additional fields have also been added to existing tables in order to ensure integrity and to assist processing. New tables and lookups have been introduced to support the newly introduced functionality. An Entity Relationship Diagram (ERD) to identify the current database structure for this module can be found on the One Release DVD.

## UDFS

UDFs Migrated	Accessible via V4 Online
Bases\Areas	When viewing a base, navigate to <b>Areas</b> tab, where clicking on the <b>UDFs</b> link will give you access to these UDFs
Person	When viewing a base, navigate to <b>Base Contacts</b> tab, click on any of the members in the displayed list, the name will be hyperlinked. This will open a tabbed <b>Person Details</b> window, Person UDFs will be on the <b>UDFs</b> tab.

In v3, UDFs were held in the respective table for the entity to which they belonged e.g. Base\Areas UDFs were held in the Bases table. In v4 UDFs are held in separate UDF tables (UDF\_DEFINITION, UDF\_ENTITYTYPE\_LINK and UDF\_ENTITY\_VALUE).

## Linked Documents

Linked Documents are migrated for the base record. Any previously linked files will be linked to the Context ID that belongs to the **Base Details** tab page. Files linked to the **Base Details** tab using the Linked Files functionality will be accessible in v4 following the migration process, these will be accessible in the **Linked Documents** area from where the relevant base record is accessed.

In v3, linked files could be added to a record and they could also be uploaded. Linked files, whether recorded or uploaded, are migrated to v4.

Post migration, where files need to be linked to a base in v3, they should be linked to the **Base Details** tab. This way they are available via v4 Online. Otherwise linked files should be linked to a base using v4 Online. Linked files for the **Classifications** tab page have not been migrated as the linked files for this tab are not stored against the selected base.

## Base Groups

New functionality has been introduced for base groups therefore the existing functionality in v3 will no longer be used for base groups. Base groups will be migrated from the School\_group table in v3 to Clusters table in v4, enabling it to be used by v4 Client and v4 Online.

Base group membership will be migrated from School\_groups\_members\_list table in v3 to Cluster\_population, enabling it to be used in conjunction with clusters.

Although the term **Clusters** is used in v4 Client, v4 Online will use **Base Groups**.

## Bases Full v3 Lookups to v4 Bases Full

Within the v3 software the Bases Full lookups were used and these were directly linked to the Bases module. These will be migrated to be linked to the v4 Bases module.

## Access Control in v4 and Permissions

System Administrators will need to ensure that access rights have been set appropriately in v4 before new v4 users start to use the system.

The access rights given to a user (for example, through Permissions to the User group) will apply whether the user accesses Bases through v4 Client or v4 Online.

Note: System Administrators automatically have access to all areas.

Full details of permissions required to access Bases are as follows. These are also documented in the **One Bases Handbook**.

### Access for Bases Administrators at the Local Authority

Within the new software it is insufficient simply to be provided with a user account and password to access the new Bases module. There are two additional steps that Local Authority (Bases) Administrators need to undertake. The first is to establish permissions, this is undertaken in conjunction with the authority’s System Administrator and is relatively straight-forward in that it is likely that the Bases Administrator will be given all permissions and specifically denied none.

### User Group Permissions

Bases users can be set up to belong to any or all of the following three user groups: **Base Administration**, **Bases** and **Base Groups Administration**.

Access to functionality can be controlled by setting each of the following processes to the appropriate level and requirement. Alternative documentation is available for System Administrators with a more detailed description of this functionality. The following example should help during the set-up phase. In addition, Knowledge Experts can also provide assistance and guidance to ensure that the permissions are optimised to the authority’s requirement.

### Base Administration

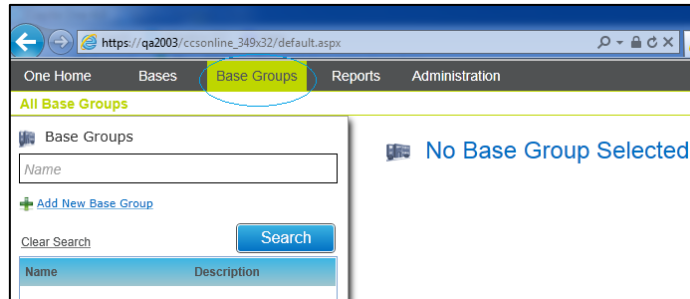
**Administration** access to the primary and secondary menu items are governed by the **Base Administration** Main Business Process, as shown in the following graphic:

01. Main Processes				
Main Business Processes	Base Administration			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
▶ Base Administration			✓	
Academic Years			✓	
Associated People			✓	
Base Days			✓	
Bases			✓	
Bases Administration	✓			
Initialise Opening Times			✓	
LA Contact			✓	
Manage B2B: Student Users		✓		
Manage UK Bases		✓		
People Roles			✓	
School Contact			✓	



## Base Groups Administration

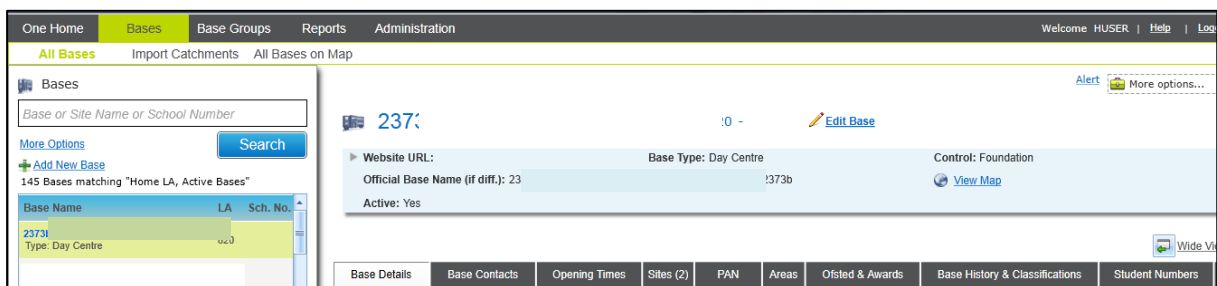
**Base Groups** access to the primary and secondary menu items are governed by the **Base Groups Administration** Main Business process, as shown in the following graphic:



01. Main Processes				
Main Business Processes	Base Groups Administration			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
Base Groups Administra...			✓	
Base Groups			✓	
Populate		✓		
Remove		✓		
Report Chooser		✓		

## Bases

**Bases** access to the details and tabs is governed by the **Bases** Main Business process, as shown in the following graphic:



The Read & Deny permissions for the following business processes, determine access to the relevant **Bases** tab:

- Areas
- Base Contacts
- Base History And Classification
- Base Summary
- Ofsted And Awards

- Opening Times
- PAN
- Sites
- Student Tab

01. Main Processes				
Main Business Processes: <span style="border: 1px solid black; padding: 2px;">Bases</span>				
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
▶ Bases			✓	
Areas		✓		
Base Contacts			✓	
Base Details			✓	
Base History And Classification		✓		
Base Summary Information	✓			
Gates			✓	
Manage Agencies	✓			
Ofsted And Awards			✓	
Opening Times			✓	
PAN	✓			
Sites		✓		
Student Tab	✓			

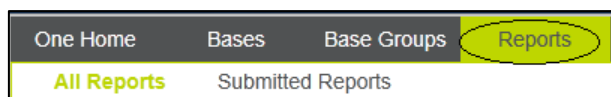
## Additional Permissions

### Reports

**Reports** access to the primary and secondary menu items are governed by the **Administration** Main Business process.

The following business processes are required:

- Report Management
- Report Permissions
- Report Processing
- Summary Reports



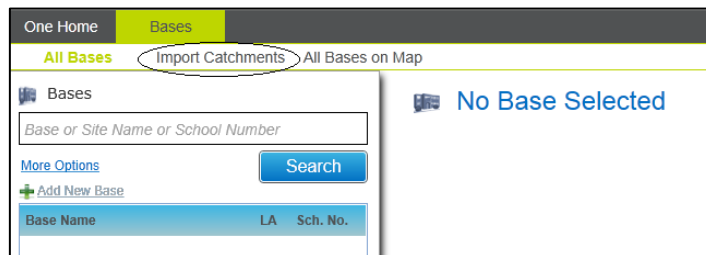
01. Main Processes				
Main Business Processes	Administration			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
Quick Report (Allow)	✓			
Report Management			✓	
Report Permissions		✓		
Report Processing			✓	
Role Manager				✓
Scheduled Task				✓
SEN Returns				✓
SQL Mail Merge				✓
Summary Reports			✓	

### Import Catchments

**Import Catchments** access to the secondary menu items under **Bases** primary menu item is governed by the **Admissions Setup and Population** Main Business process.

The following business processes are required:

- Update Catchments (Minimum Read-Write)



01. Main Processes				
Main Business Processes	Admissions Set Up and Population			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
Admissions Set Up and Population			✗	
Applications Administration	✓			
Base Admin for Admissions				✓
Flag Feeder Receiver Processing				✓
GIS Administration	✓			
Linked Receivers	✓			
PAN (including Banding) and Vacancies	✓			
Populate Transfer Group in bulk				✓
Test Definitions	✓			
Transfer Groups/Sub Groups Administration	✓			
Update Catchments			✓	

## V3, V4 Online & GIS Licenses

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Once the migration is complete, Bases v3 will still be accessible.

A Bases licence is required to access the following functionality:

**Base Groups**

**Administration | Initialise Opening times**

**Bases | All Bases on Map**

A GIS licence is required to access the following functionality in v4 Online:

**All Bases on Map**

**View Map** from a Base

**View Map** from a Gate

**Import Catchments**

## Reports

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Crystal Reports in v4 are accessed via a separate **Reports** menu option within Bases functionality. Any locally defined reports in v3 will not be automatically copied into the appropriate area in v4. If Local Authorities have defined their own reports in v3, these must be copied across manually in the appropriate subfolder in the Reports Repository for them to be accessible in v4. It is recommended that locally defined reports are titled using descriptive language.

**Note:** v3 Quick Reports functionality will be replaced by the v4 Quick Reports, the latter functionality creates Word templates (.dot files) and does not use Crystal Reports. Existing v3 Quick Reports will not be available in v4.

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## Linked Documents

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Linked documents might not open in the browser. The required browser settings are outlined in the *One Bases* handbook.

## Base Groups

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Base Groups in v4 Online mirrors the functionality introduced in PULSE for clusters. There are two ways to populate a base group, manually and using existing SSRS report criteria. Both are fed back into the Base Groups functionality and can be edited further.

## Migration Checklist

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The following is a checklist of migration steps:

Step	Action	Before/After Migration	Status
1	Contact the One Service Desk and request the v4 Online Bases configuration to be set up by the One Technical Services team.	Before	
2	Obtain <b>Licence Keys</b> for Bases v4 and record them via v3 <b>Tools   Licensing</b> .	Before	
3	<p><b>Run the Migration Routine:</b></p> <ol style="list-style-type: none"> <li>1. Access v4   <b>Tools   Migrate v3</b>.</li> <li>2. Select <b>Bases</b> in the <b>Migration Module</b> drop-down. Optionally enter free text notes in the <b>Migration Details</b>.</li> <li>3. Run in <b>Report-Only</b> mode. Review errors before migrating.</li> <li>4. Run in <b>Live</b> mode.</li> </ol>		
4	<p>Set up User Group Permissions via v4 <b>Tools   Permissions   Group Processes</b>.</p> <p>Uses need to be assigned permissions in order to access <b>Bases</b> functionality in v4 Online.</p>	Before or After	

## Other Documents to Help You

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### One Bases Handbook

The *One Bases* handbook is available on the release DVD.

### Reference Guides

Reference Guides are high level 'how to' guides outlining how specific processes should be performed. These are available on the release DVD and on SupportNet.

### Entity Relationship Diagram

An Entity Relationship Diagram for Bases is available on the release DVD to identify the current database structure for this module.

## Where to go for more help

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More detailed information on v4 Bases is included in the help files accessed from within the v4 Online application by clicking the **Help** button.

If you wish to discuss training and consultancy for migrating to Bases from v3 to v4 the Capita Professional Services team can be contacted on

Tel: 01234 838080

Fax: 01234 832194

Email: [oneservices@capita-cs.co.uk](mailto:oneservices@capita-cs.co.uk)

The Capita One Service Desk can be contacted on

Tel: 0870 2411 323 - Calls to 0844/0845/0870 numbers will cost three pence per minute, plus your phone company's access charge.

Fax: 01234 832082

Email: [one.support@capita-cs.co.uk](mailto:one.support@capita-cs.co.uk)