CAPITA

oneeducation

CIEE

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Migration Notes

Revision History

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Contacting the Service Desk

You can log a call with the Service Desk via the Customer Service tool available on My Account.

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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:

onepublications@capita.co.uk

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

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Introduction

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

These v4 modules use Silverlight in the web browser. A document called *Technical Guide - CCS v4 Online Setup.pdf* is available on the One release media and from the One Publications website (www.onepublications.com) and outlines configuration requirements for Silverlight that are necessary for the v4 Children in Employment and Entertainment module. The Silverlight component is deployed on the web server; therefore this will need to be considered when implementing Children in Employment and Entertainment v4. The Silverlight program will need to be allowed to self-install onto client computers. Local Authorities must contact the One Service Desk and request for the v4 Online Children in Employment and Entertainment configuration to be setup by One Technical Services.

Children in Employment and Entertainment is part of the Applications module within One v4 Online. There are two separately licensed modules, Children in Employment and Children in Entertainment. Although there is some shared functionality, each area also has specially tailored tools. As Local Authorities can purchase these modules individually the migration routine below has to be run for each module.

Migration Advice

Instructions to migrate the Children in Employment and Entertainment 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 Children in Employment and Entertainment 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 should consider copying the Local Authority's live One dataset to a test instance and run the migration routines on a test instance first.*

Steps to Migrate Children in Employment and Entertainment

01.1 Prerequisites

1. Local Authorities must contact the One Service Desk and request for the v4 Online Children in Employment and Entertainment configuration to be setup by One Technical Services.

2. Local Authorities need to obtain licence keys for Children in Employment and Entertainment 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 Children in Employment and Entertainment in v4:*
> *Set up User Group Permissions. Users need to be assigned permissions in v4 Client in the following area in order to access Children in Employment and Entertainment functionality in v4 Online via **Tools | Permissions | Group Processes and Tools | Report Permissions.***

01.2 Running the Migration Routine

The migration routine is available in the v4 Client. Instructions below show how to migrate the Children in Employment module. This needs to be repeated for the Children in Entertainment module.

1. In One v4 client, select **Tools | Migrate v3** to display the **Migration** page.

2. Select **Child Employment** in the **Migration Module** drop-down list. You can optionally add free text notes in the **Migration Details** field.
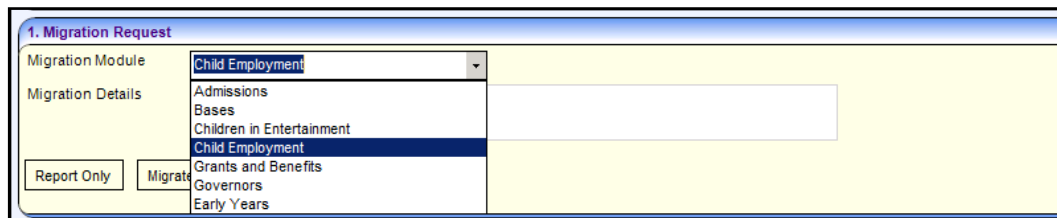

Note: The migration routine must be run in **Report Only** mode first at least once before running in **Migrate Live Data** mode.

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 on page *6*).
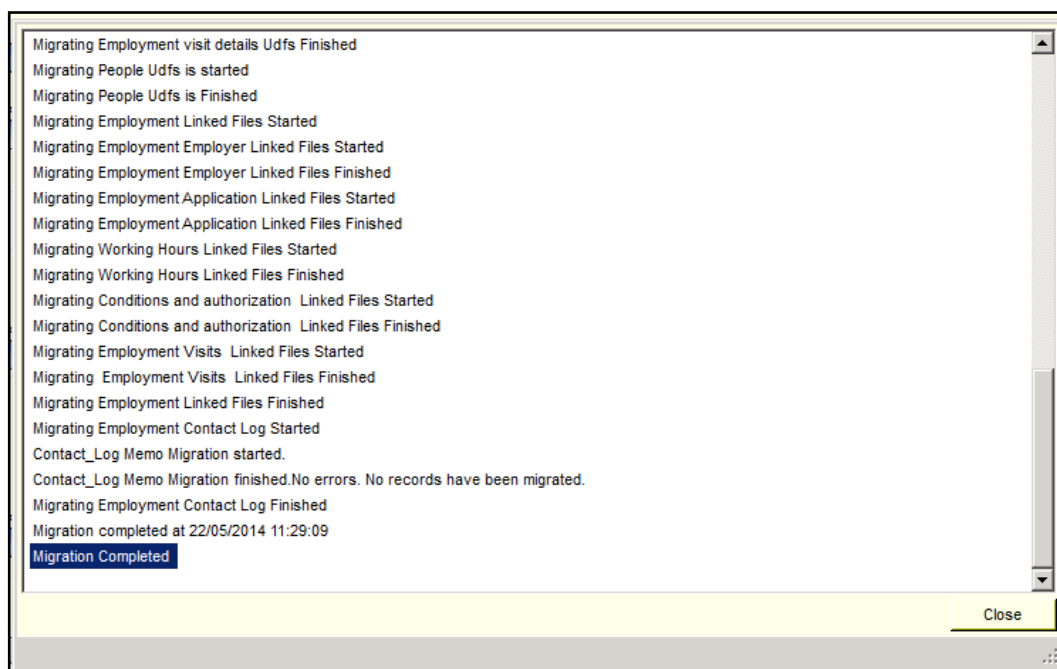

6. Run the migration routine in **Report Only** mode repeatedly, each time reviewing and correcting any errors listed in the Migration Log.

> *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, click the **Migrate Live Data** button to display the following warning message:
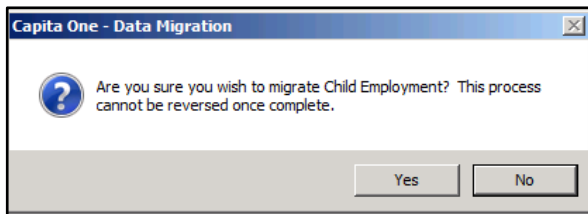
8. Click the **Yes** button to initiate the migration routine. Once the migration routine is complete the following message is displayed:
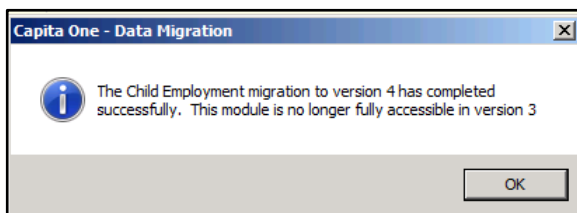
The **Migrate Live Data** option becomes disabled as this process cannot be run again.

9. Log out of One v4 and then log back in before opening up any other v4 menu routes.

Migrated Data

During the migration the following actions occur:-

■ The migration moves all the employers and applicants to the BASES table. The employer/applicant contacts will migrate to Base Contacts table (BASE_CONTACTS).

■ Other CIEE tables which migrate to the BASES table are Venues and Performance Locations.

■ CE Parent company data is moved into a new table (PARENT_COMPANY).

■ Job Titles Lookup will be moved into Roles.

It would therefore be advisable for the Local Authority to check whether there are any duplicate employers and bases which are the same but have been named differently. If they are not renamed before the migration duplicates may appear for the same base, e.g., if the LA has entered a school base and then added the school as an employer in v3 and recorded the name slightly different, a duplicate would be created.

UDFS

UDFs Migrated	Accessible via V4 Online
Children in Employment and Entertainment\Areas	When viewing applications the existing UDFs will be available on certain screens for viewing and recording information.

Children in Employment and Entertainment Full v3 Lookups to v4 Children in Employment and Entertainment Full

Within the v3 software, the Children in Employment and Entertainment Full lookups were used and these were directly linked to the Children in Employment and Entertainment module. These will be migrated to be linked to the v4 Children in Employment and Entertainment 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.

NOTE: *System administrators automatically have access to all areas.*

Full details of permissions required to access Children in Employment and Entertainment are as follows. These are also documented in the *Managing Children in Employment and Entertainment Handbook* available from the One Publications website (http://www.onepublications.com)

Access for Children in Employment and Entertainment 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 Children in Employment and Entertainment module. There are two additional steps that Local Authority (Children in Employment and Entertainment) 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 Children in Employment and Entertainment Administrator will be given all permissions and specifically denied none.
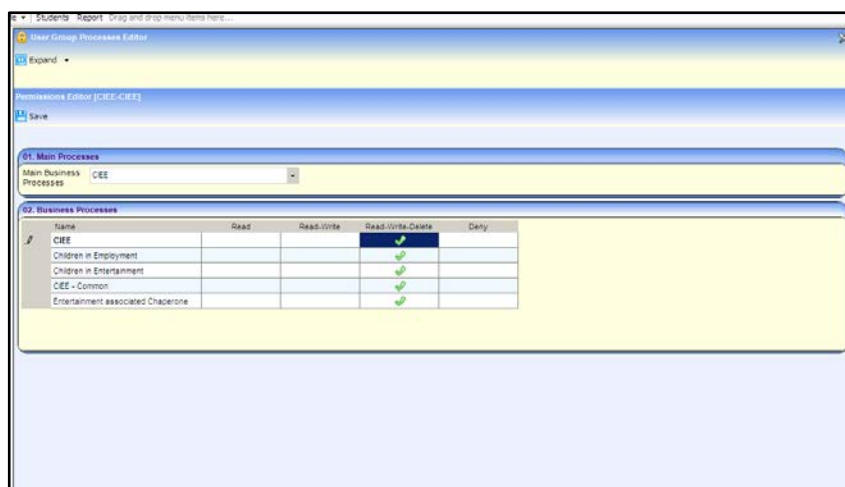
User Group Permissions

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.

Children in Employment and Entertainment

CIEE uses business processes to determine the users groups that have access to specific CIEE functionality. User groups are assigned, Read, Read-Write, Read-Write-Delete or Deny permissions to each CIEE business processes. Permissions are maintained in the One v4 Client. One System Administrators should create the user groups with the desired level of access to the following business processes and main business processes:

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

Bases/Student Data/Person Administration

Permissions for these main business processes can be set to whatever the required level is for the selected user group. However, they cannot be set to Deny.
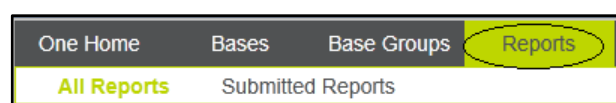
Additional Permissions

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

V3, V4 Online Licenses

Once the migration is complete, Children in Employment and Entertainment v3 will be removed from v3. Licences are required for v4 Children in Employment and v4 Children in Entertainment module and should be recorded via **v3 | Tools | Licensing**.

Reports

Crystal Reports in v4 are accessed via a separate **Reports** menu option within the Children in Employment and Entertainment module. 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.

One system administrators should also apply Report permissions to the relevant Children in Employment and Children in Entertainment in v4 client.

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

Migration Checklist

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 Children in Employment and Entertainment configuration to be set up by the One Technical Services team.	Before	
2	Obtain Licence Keys for Children in Employment v4 and Children in Entertainment v4 and record them via v3 Tools | Licensing.	Before	
3	**Run the Migration Routine:** 1. Access **v4 | Tools | Migrate v3**. 2. Select Children in Employment in the Migration Module drop-down. Optionally enter free text notes in the **Migration Details**. 3. Run in Report-Only mode. Review errors before migrating. 4. Run in Live mode (requires exclusive access). 5. Repeat the above steps selecting Children in Entertainment.		
4	Set up User Group Permissions in v4 via **Tools | Permissions | Group Processes**. Set up Report Permissions in v4 via **Tools | Permissions | Report Permissions**. Uses need to be assigned permissions in order to access Children in Employment and Entertainment functionality in v4 Online.	Before or After	

Other Documents to Help You

One Children in Employment and Entertainment Handbook

The *Managing Children in Employment and Entertainment* handbook is available from the One Publications website (http://www.onepublications.com).

Entity Relationship Diagram

An Entity Relationship Diagram for Children in Employment and Entertainment is available from the One Publications website (http://www.onepublications.com).

Where to go for more help

If you wish to discuss training and consultancy for migrating to Children in Employment and Entertainment 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

The Capita One Service Desk can be contacted on

Web: https://myaccount.capita-cs.co.uk/

Fax: 01234 832082

Email: one.support@capita-cs.co.uk