G&B

last updated for the Autumn 2014 release

Migration Notes

Revision History

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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:

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 Grants and Benefits (G&B) from v3 to v4. It describes the step-by-step process required to migrate from v3 and successfully start using Grants and Benefits functionality in v4.

The G&B v4 module 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 G&B v4 module. The Silverlight component is deployed on the web server; therefore this will need to be considered when implementing G&B 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 G&B v4 configuration to be setup by One Technical Services.

Grants and Benefits is part of the Applications module within One v4 Online and requires a G&B v4 licence to operate.

Migration Advice

Instructions to migrate the G&B 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 Grants and Benefits 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 Grants and Benefits to v4

01.1 Prerequisites

1. Local Authorities must contact the One Service Desk and request for the v4 Online Grants and Benefits configuration to be setup by One Technical Services.
2. Local Authorities need to obtain licence keys for Grants and Benefits v4 and record them via the v3 **Launcher Screen | Tools | Licensing**.
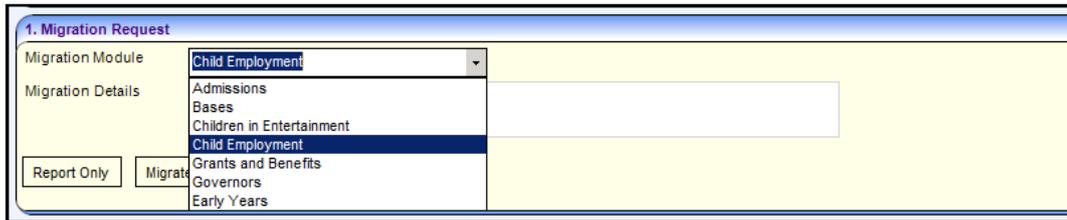
> *Note: Before or after running the migration routine, the following must be carried out for users to access Grants and Benefits in v4:*
> *Set up User Group Permissions. Users need to be assigned permissions in v4 Client in the following area in order to access Grants and Benefits reporting functionality 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.

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

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

1. Migration Request
Migration Module	Child Employment ▼
Migration Details	Admissions
	Bases
	Children in Entertainment
	Child Employment
Report Only	Migrate	Grants and Benefits
	Governors
	Early Years

> *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 *5*).

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 a 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.

10. The only two areas that migrates from v3 to v4 are Claims UDFs and Claims memos. No other Grants & Benefits data considered for migration.

UDFS

UDFs Migrated	Accessible via V4 Online
Grants & Benefits\Claims	When viewing applications, the existing UDFs will be available on the Claim Application screens for viewing and recording information.

Grants & Benefits Full v3 Lookups to v4 Grants & Benefits Full Lookups

Within the v3 software, the Grants & Benefits full lookups were used and these were directly linked to the Grants & Benefits module. These lookups will be available in the v4 Grants & Benefits 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 Grants and Benefits v4 are as follows. These are also documented in the *Managing Grants and Benefits Handbook* available from the One Publications website (http://www.onepublications.com)

Access for Grants and Benefits 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 Grants and Benefits module. There are two additional steps that Local Authority (Grants and Benefits 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 Grants and Benefits Administrator will be given all permissions and specifically denied none.

User Group Permissions

Grants and Benefits

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.

G&B uses business processes to determine the users groups that have access to specific G&B functionality. User groups are assigned, Read, Read-Write, Read-Write-Delete or Deny permissions to each G&B 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:

Access to the details and tabs of Grants and Benefits is governed by the **GNB** Main Business process, as shown in the following graphic:

CIEE

After setting G&B permissions, One sets permissions for the CIEE main business process automatically. This occurs even if your site does not have a CIEE licence. The permissions set for the CIEE main business process are not sufficient to administer CIEE, and additional permissions are required for groups that will also administer CIEE.

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

	One Home	Bases	Base Groups	Reports
	All Reports	Submitted 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			✔	

V3, V4 Online Licenses

Once the migration is complete, Grants and Benefits v3 will be removed from v3. Licences are required for v4 Grants and Benefits recorded via **v3 | Tools | Licensing**.

Reports

Crystal Reports in v4 are accessed via a separate **Reports** menu option within the Grants and Benefits 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 Grants and Benefits 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 Grants and Benefits configuration to be set up by the One Technical Services team.	Before	
2	Obtain Licence Keys for Grants and Benefits v4 and record them via v3 **Tools | Licensing**.	Before	
3	**Run the Migration Routine:** 1. Access **v4 | Tools | Migrate v3**. 2. Select Grants and Benefits 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).		
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 Grants and Benefits functionality in v4 Online.	Before or After	

Other Documents to Help You

One Grants and Benefits Handbook

The *Managing Grants and Benefits* handbook is available from the One Publications website (http://www.onepublications.com).

Entity Relationship Diagram

An Entity Relationship Diagram for Grants and Benefits 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 Grants and Benefits 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