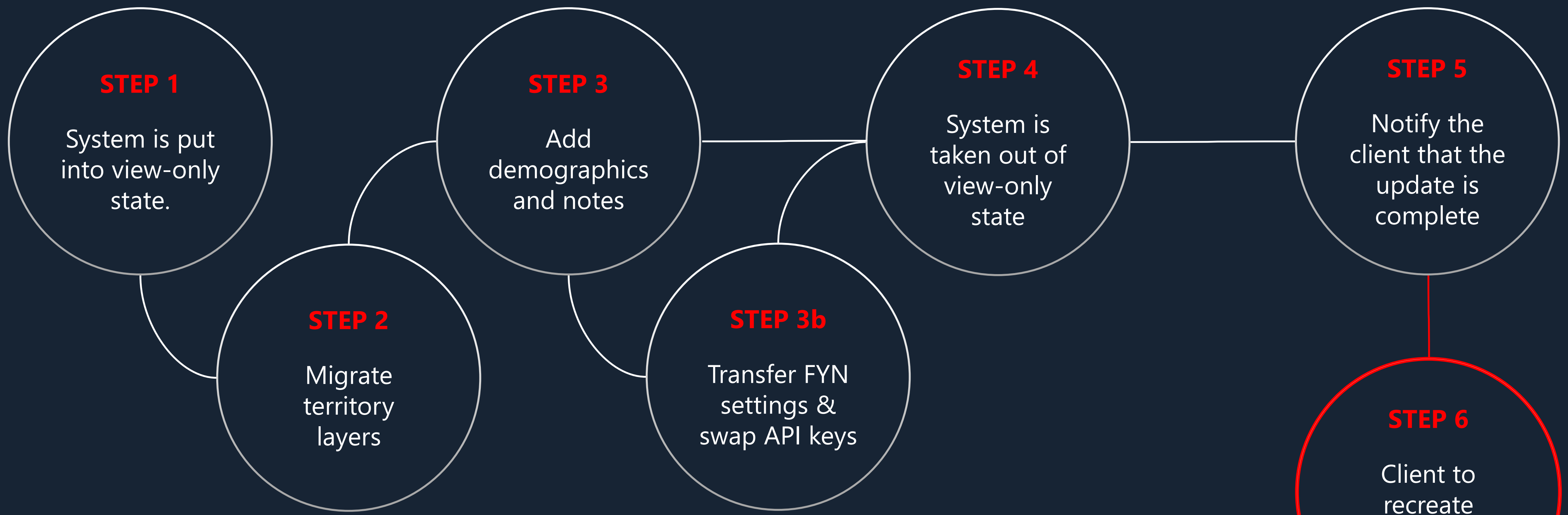
Updating to the 2021 Census with Ward and Local Authority Districts Workflow



Workflow for updating client systems using Wards and Local Authority Districts.

NOTES.

White circles are steps managed by Atlas Mapping, and red circles are to be managed by clients.

Check API usage when arranging the update. It determines the need for Step 3b.

Step 1. The system is put into a view-only state

The system will be put into a view-only state on the scheduled update date. At this point, Scott will create the following reports:

1. **User report** contains Layer Name, User email, View only? and Filter Name.
2. **Classifications on layer report** contains Layer Name and Classification Name.
3. **CustomFields on layer report** contains the Layer Name and CustomField Name
4. **Territory allocation file** contains Base Area UniqueKey, Territory Name and Territory UniqueKey.
5. **Territory allocation file (base layer is NOT Wards)** contains Base Record UniqueKey, Base Record Name, Aggregated Record UniqueKey, Aggregated Record Name.
6. **Layer demographic report** contains Layer Name, Demographic Name, Demographic Type, and Demographic Position.
7. **Territory data report** ** contains Record ID, Record Name, Record UniqueKey, Classification Name, CustomField Name and CustomField Value.
8. **Note report** contains Layer Name, Record UniqueKey, Record Name, and Note Body.
9. **FYN report** contains Layer Name, Record UniqueKey, Record Name, Ruleset Name, Overriding Distance (mi).
10. **Share report** contains Layer Name, Record UniqueKey, Record Name and Shared User email.

The **User report** will be used to set users to view-only.

** This export will have duplicated rows for the number of attached custom fields. Some Excel work will be needed to turn the rows of custom fields into separate columns so that each territory only has one row.

Step 2. Migrate territory layers

Create new versions of the territory layers in Vision and attach any relevant classifications and custom fields using the **Classifications on layer report** and the **CustomFields on layer report**.

Ward-based territory layers are being recreated using a geographic transfer method. Local Authority District-based territory layers will be recreated using an allocation file.

CHECKS

Check for duplicate territory names in the **Territory data reports**. Any duplicate names will require manual changes to be made to the allocation file.

Check for multiple custom fields attached to territory layers. If so, some work will need to be done to the import file for Scott. More information can be found in the previous slide against the ** note.

When complete, Scott can import into the new territory layers.

Step 3. Add demographics and notes

The **Layer Demographic report** will be used to add any matching or 'best fit' 2021 Census demographics for England and Wales. The same applies to custom demographics. Any differences will be noted and communicated to the client.

The **Note report** will be used to recreate notes against territories.

Step 3b. Transfer FYN settings and API keys

The **FYN report** will be used to transfer FYN settings. The API keys will also need to be adjusted when it's complete. The API keys will also need adjusting if any other APIs are being used.

CHECK with the client that they are happy to have FYN swapped to the new versions of the territory layer.

Step 4. System is taken out of view-only state

The **User report** will be used to restore editing permissions to users.

Step 5. Notify the client that the update is complete

Notify the client that the update is finished and communicate any changes or key information. Provide the client with supporting information for Steps 6 and 7.

Step 6. Client to recreate territory shares

The client will use the **Share report** to recreate territory shares.

Step 7. Client to manage boundary changes

Ward-based territories. Managing the changes to these layers will need to be done by comparing the old version of the territory layers to the new ones.

Local Authority District-based territories. Clients can manage the changes to these territories using the supporting documents; UK 2022 Ward and Local Authority District changes pdf and UK 2022 Local Authority District Changes xlsx.