IPS SQL Pre-migration Guidance

March 2026

Contents

Foreword

This guidance provides an overview of the IPS Cloud Pre-migration Report output, and the necessary steps required to update/correct erroneous or missing data in accordance with the instructions below. The report only returns data and can be run (and re-run) as many times as required.

Note: That additional steps are required for time users which can be disregarded if you do not use IPSSQL for time recording.

We advise that it is considered best practice to take a backup before proceeding to amend any data.

Running the IPS Cloud Pre-Migration Report

If the version of IPSSQL you are currently using is up to date you will already have access to the Onboarding Folder (Practice > Reports > Onboarding IPS Cloud). I this is not the case you will have to:

1. Copy the onboarding report files into your IPS installation folder: <Practice Menu><23~Reports><Global>

   Note: The folder (Onboarding IPS Cloud) will likely contain an older version of the report file, please replace with the latest version (20240313) supplied by your onboarding project lead.

2. Restart IPSSQL

3. In SQL Navigate to Practice > Reports > Global or Practice > Reports > Onboarding IPS Cloud depending on the installation location

4. Select ⬚ IPS Cloud Pre-Migration Report

   Note: A window will appear when the report runs.

5. In the Default Floating Charge Creditor Account enter **Account Code from Chart of Accounts**

6. In the Default unsecured Creditor Account enter **Account Code from Chart of Accounts**

7. Use the 💾 icon to save the Report as a PDF

   Note: You must supply Turnkey with a copy of the report.

   Note: The first page of the report returns the SQL Server & IPS build Info, Case Analysis and Volume Analysis data, this is for information only and will be reviewed be you development team.

IPS Cloud Pre-Migration Report
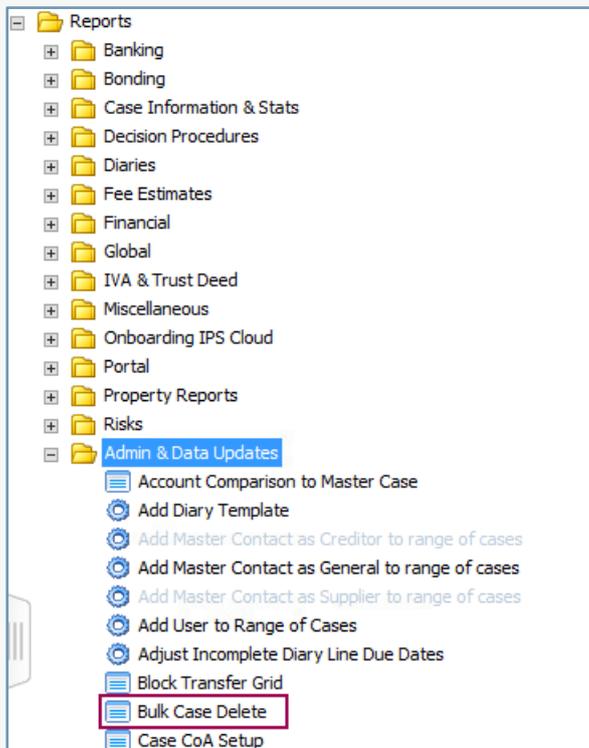Version: 20231102

SQL Server & IPS Build Info

SQL Server Version
Microsoft SQL Server 2019 (RTM-CU23) (KB5030333) - 15.0.4335.1 (X64) Sep 21 2023 17:28:44 Copyright (C) 2019 Microsoft CorporationStandard Edition (64-bit) on Windows Server 2016 Standard 10.0 <X64> (Build 14393:) (Hypervisor)

IPS SQL Build 3.0.2310

Note: Case Analysis and a Volume Analysis is again for information only, however, if your data contains a large number of 'Old Closed Cases >= 7 years' it is recommended that a review of these cases is completed and, where possible, the cases are deleted prior to migration.

Case Analysis

Total Cases	Open Cases	Closed Cases	Blocked Cases	Old Closed Cases >= 7 years
435	423	12	2	0

Note: The 'Bulk Case Delete' function, that is available via Practice Menu > Reports > Admin & Data Updates, can be used to review and delete the cases. Your IPS Cloud onboarding lead at Turnkey can provide additional guidance if required.

Note: Licenses and Portal IDs are mainly for information only but will require some data cleansing in situations where there are more than one of each. Your onboarding manager will notify you of any necessary steps.

Licenses
(If you have more than 1 Licence then please identify which is the main billing Office)

Location	Company name	Address 1	Address 2	Address 3	Address 4	Address 5
	Turnkey Computer Technology Limited	Thornton Lodge	East Kilbride Road	Clarkston	Glasgow	G76 9HW

Portal IDs
(If you have more than 1 Portal ID, please identify which one should be used.)

Location	Portal ID
	{5E444F1A-5B22-487D-B555-3AC5A3D43270}

Note: The following processes will be considerably easier with multiple displays, it is advised to keep the PDF version of the report open on one screen while using SQL on the other.

Note: The report can be reproduced as you work through the steps required to cleanse your data. You may wish to reproduce the reports as you complete each section, or during breaks in the process.

![Turnkey logo]

Users with no Email Address on Case Staff

All users migrated to IPS Cloud must have a valid and unique email address, this does not need to be an active or valid email but must conform to email standards eg. anything@something.com. Do not delete users which are listed on Case Staff this can result in data loss, such as time entries relating to that user.

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *User with no Email Address on Case Staff,* you can search using Ctrl+F to find this quickly

3. On SQL Navigate to Administration > Security > Security Manager > Users

4. Select the user
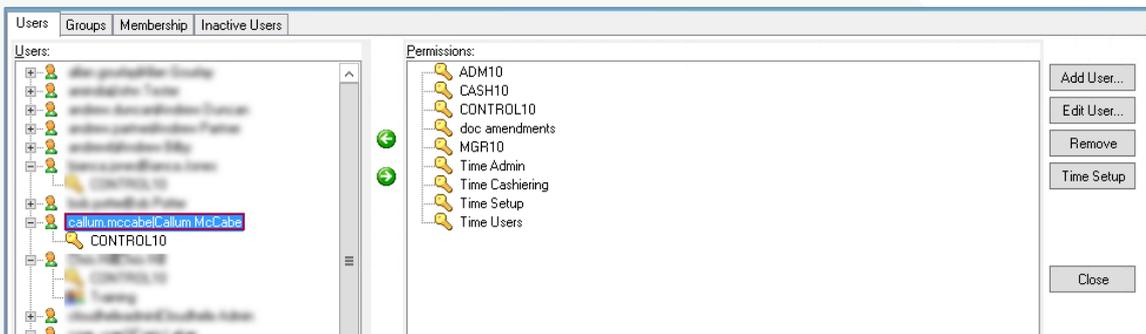
5. Select **Edit User**
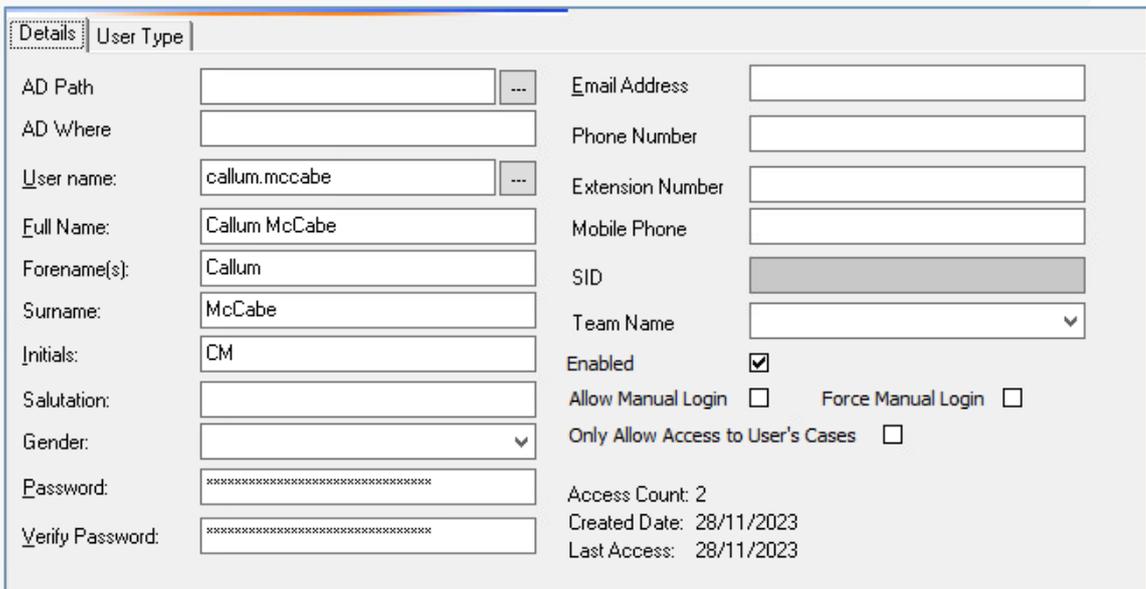
6. Enter the **Email Address** ![Email Address field: testemail1@test.com]

   Note: The emails must all be unique so you may want to add a sequential number to them if you are using dummy emails.

7. Select **Ok**

8. Continue working through the list in the report until all the emails are completed.

Duplicate Emails

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Duplicate Emails*, you can search using Ctrl+F to find this quickly
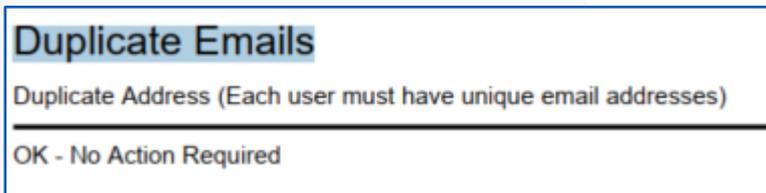
Duplicate Emails

Duplicate Address (Each user must have unique email addresses)

OK - No Action Required

3. On SQL Navigate to Administration > Security > Security Manager > Users

4. Select the user
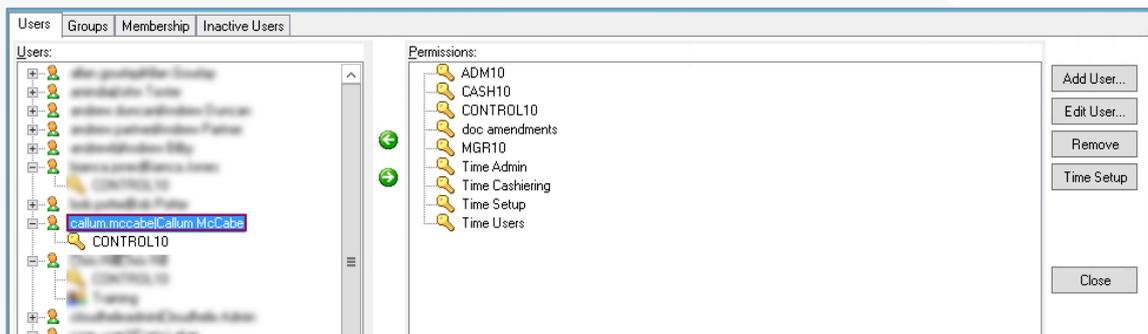
5. Select **Edit User**
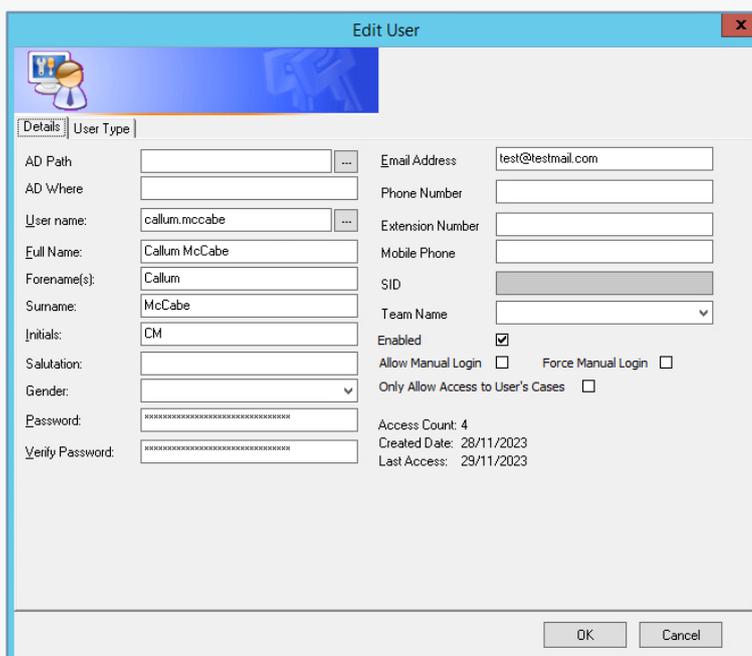
6. Amend the Email Address to make it unique

Email Address   testemail1@test.com

7. Select **Ok**

8. Continue working through the list in the report until all the duplicate emails are unique.

Case Staff with no User Record

Recreating the User

Case staff with no User Record will typically be deleted user which are still recorded on case records, these users should have been marked as inactive, however this can be resolved by recreating the user.
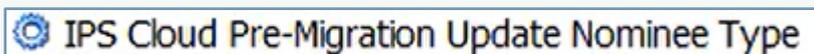
1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Case Staff with no User Record*, you can search using Ctrl+F to find this quickly

Note: Users are listed by Role, it is not necessary to add duplicates more than once.

3. On SQL Navigate to Administration > Security > Security Manager > Users

4. Select **Add User**
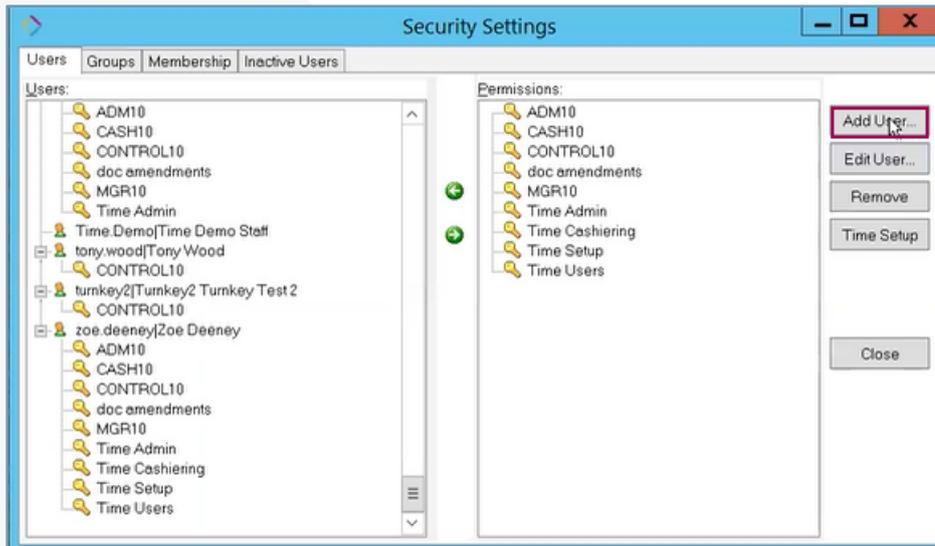
5. Enter the **Username** exactly as it appears in the Login Column of the report
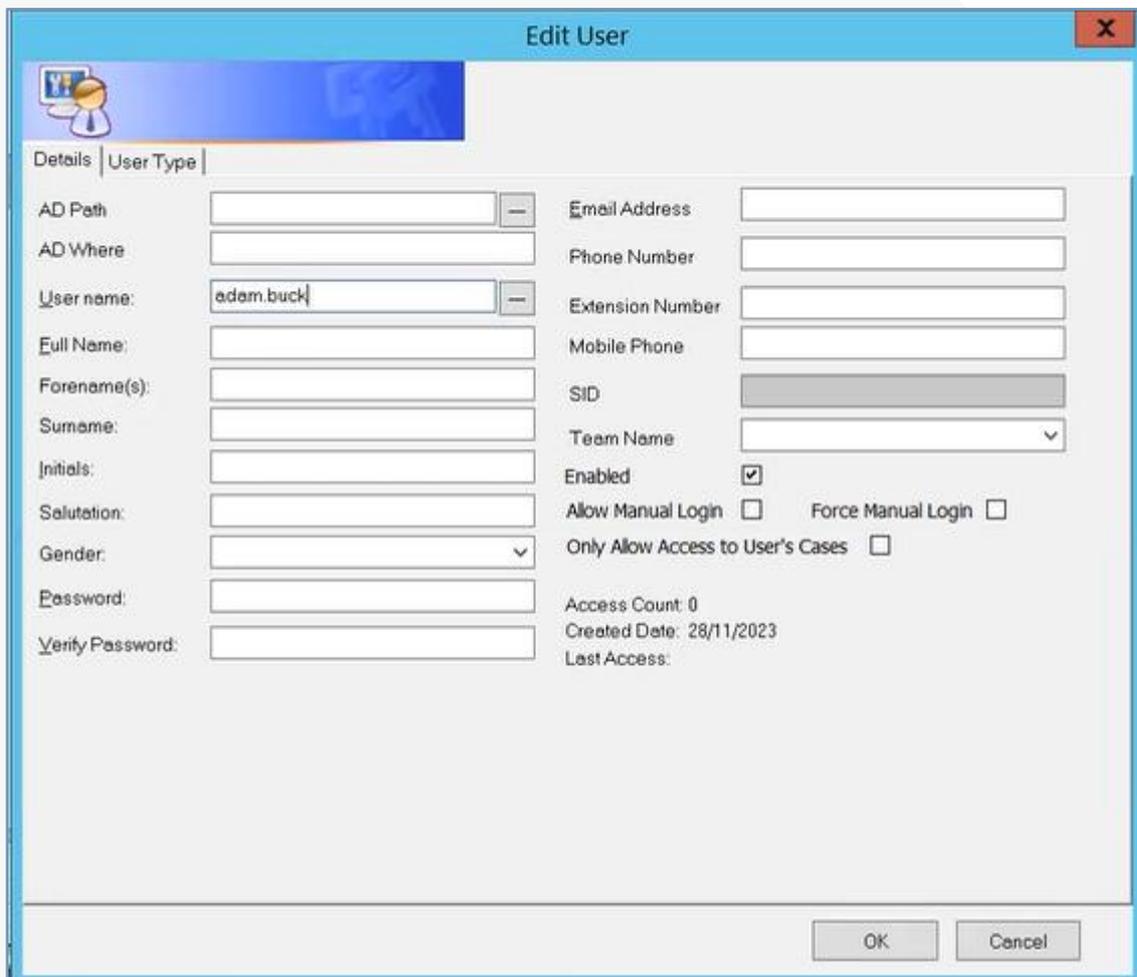
Note: in the case of Third Party IP's it is necessary to complete steps 6-7 otherwise advance to step 8.

6. Enter the **Full Name**

Note: This must match the User Name.

7. Ensure **Enabled** is not checked Ensure **Enabled** is not checked

8. Enter the **Initials**

9. Enter a unique **Email Address**

10. Select **Ok**

11. Continue working through the list in the report until all the User Records are completed.

   Note: If the staff listed are not genuine current or past users, see the guidance below.

Updating non-genuine Case Staff

1. Search for the Case Code

2. Navigate to Case > Setup > Staff

Role	Login Name	Full Name	Nominee Type	Inactive
Appointment	darren.white	Darren J White	Lead	☐
Manager	john.fitzgerald	John Fitzgerald	Lead	☐
Cashier	john.fitzgerald	John Fitzgerald	Lead	☐
Cashier	callum.mccabe	Callum McCabe		☐

3. Select the User

4. Double-click the User
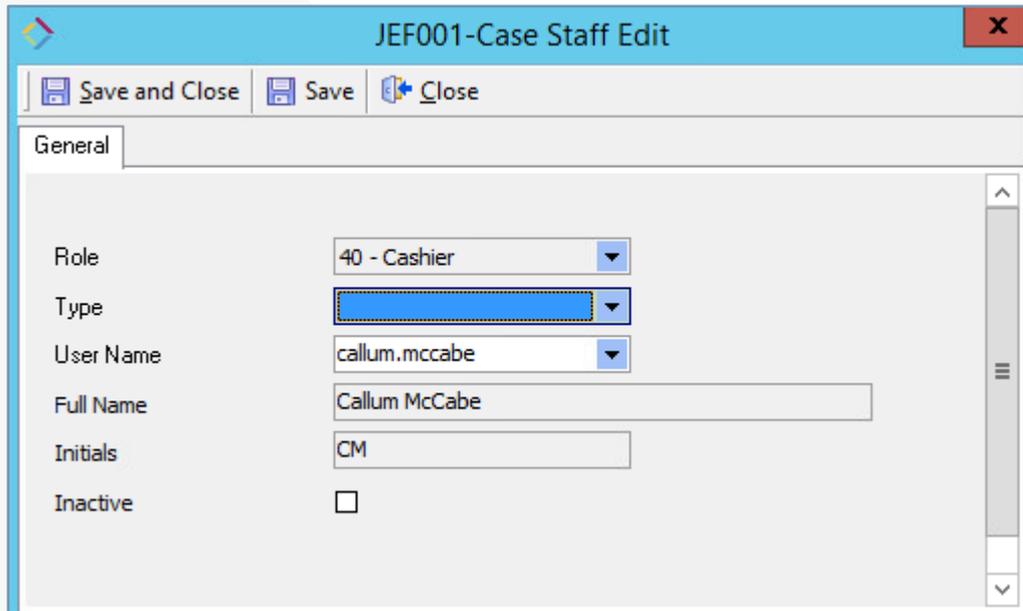
5. Check the Inactive box

6. Select **Save and Close**

7. Repeat as required

Missing Bond Providers

1. Open the Pre-Merge report using a pdf reader

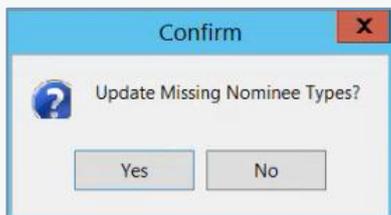2. Navigate to *Case Staff with no User Record*, you can search using Ctrl+F to find this quickly

3. On SQL Navigate to Administration > Maintenance > Lookup List

4. Select the Filter Icon within **Lookup Type**

5. Select **LQCASENOMINEE**

6. Identify the bonding column and enter the relevant bond provider in the blank fields of Link 7

	Link 2	Link 3	Link 4	Link 5	Link 6	Link 7
	ACCCA	DW			65432	Marsh
	IPA	AP			9899	
	IPA	JO			3996	
	IPA	DJP			1235	Marsh
	IPA	DJP			1111	Marsh
	IPA	MS			1937	
	IPA	DCM			9999	
	ICEW	HJ			1122	
	IPA	GW			1166	Marsh

Note: This is not usually possible for 3rd party appointees in which case ignore.

Meetings with no Meeting Type

On migration to IPS Meetings with no Meeting Type selected will default to Physical Meetings. There is no need to amend these if that is not a problem for your firm.

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Meetings with no Meeting Type*, you can search using Ctrl+F to find this quickly

3. On SQL use Look for Case to search for the Case Code

4. Navigate to Case > Decision Procedures > Meetings > Meetings

5. Double-Click the **Meeting Type** Field

6. Select the Meeting type

7. Select **Save and Close**

8. Complete the remaining Meetings with no Meeting Types

Case Staff with no Nominee Type

Resolve Using Script

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Case Staff with No Nominee Type*, you can search using Ctrl+F to find this quickly

Case Staff with No Nominee Type
Apply Script: IPS Cloud Pre-Migration Update Nominee Type, to fix this issue.

Case Code	Name	Login Name	Role
			40
124578	Test Demo2 Ltd	john.fitzgerald	40

Note: The cases identified will be detailed in the report, these are cases where the Lead, Second IP, Case Manager etc. have not been specified. This can be resolved manually or by running a script which will allocate the Nominee Type based on the order in which staff were added to the case. Only run the script, if you agree with the logic descried above otherwise advance to Resolve Manually.

3. On SQL navigate to Practice > Reports > Global / Practice > Reports > Onboarding IPS Cloud depending on the installation location

4. Select **IPS Cloud Pre-Migration Update Nominee Type**

5. Select **Yes**

6. Select **Ok**
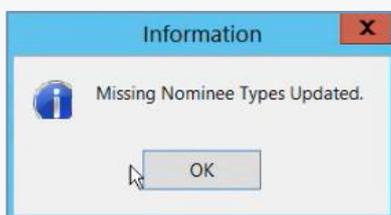
Resolve Manually

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Case Staff with No Nominee Type*, you can search using Ctrl+F to find this quickly

3. On SQL use Look for Case to search for the Case Code

4. Navigate to Case > Setup > Staff

5. Double-click the blank Nominee Type

6. Select the **Type**
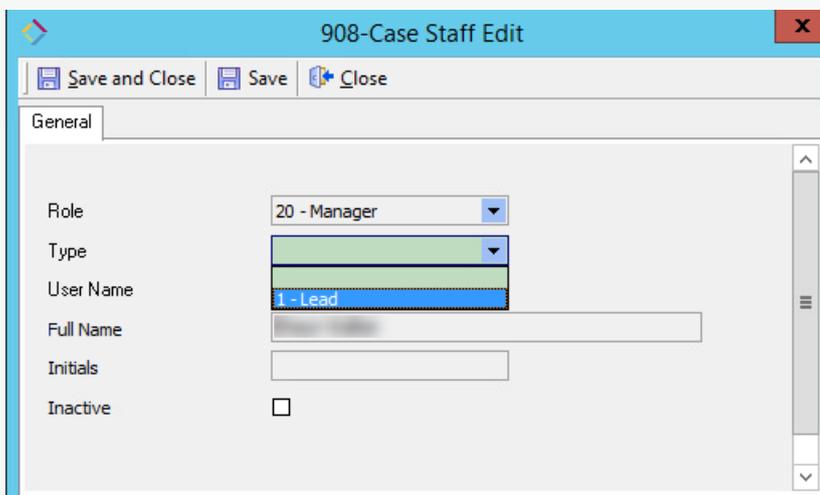
7. Select **Save and Close**

8. Continue assigning Nominee Types until the list has been completed

Missing LQCASESIGN

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Missing LQCASESIGN,* you can search using Ctrl+F to find this quickly

*Note:* The Code must be set as the IP's name as it appears in Edit User screen, Administration > Security > Security Managr > User > (selected user).
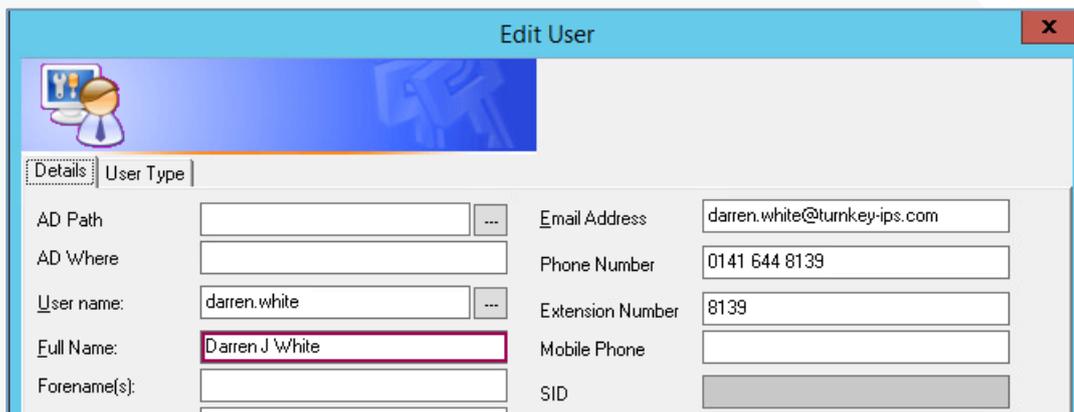
Note: If this is not addressed the data in the Description field will be use to populate the Code field.
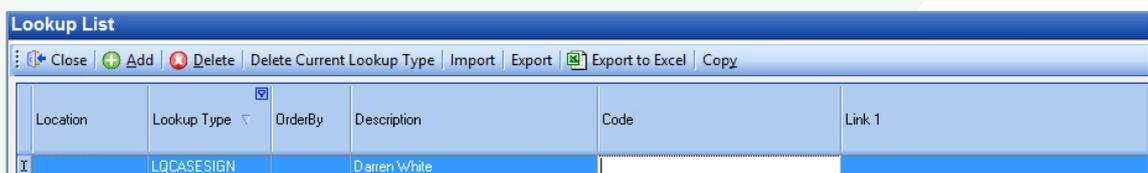
3. On SQL Navigate to Administration > Maintenance > Lookup List

4. Select the Filter Icon within **Lookup Type**
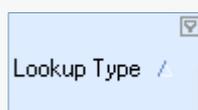
7. Select **LQCASESIGN**

8. Select the Code Field
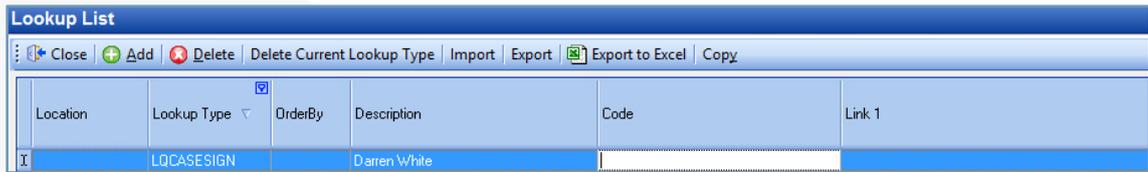
9. Enter the Full Name exactly as it appears in the Edit User screen.

10. Continue working through the list until all Codes are completed.

Inactive Case Staff On Open Cases

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Inactive Case Staff On Open Cases*, you can search using Ctrl+F to find this quickly

Note: These are Users that are marked as active on open cases, but are not enabled within the Security Manager.

3. Ensure that these staff members are genuinely inactive (e.g., have left the practice) in which case no further action is required

Note: If any staff member in the list has been replaced using the IPS utility (a staff name changes for instance) then these will need to be corrected manually.

Enabling an Inactive User

1. If the staff member is incorrectly marked as Inactive navigate to Administration > Security > Security Manager > Inactive Users
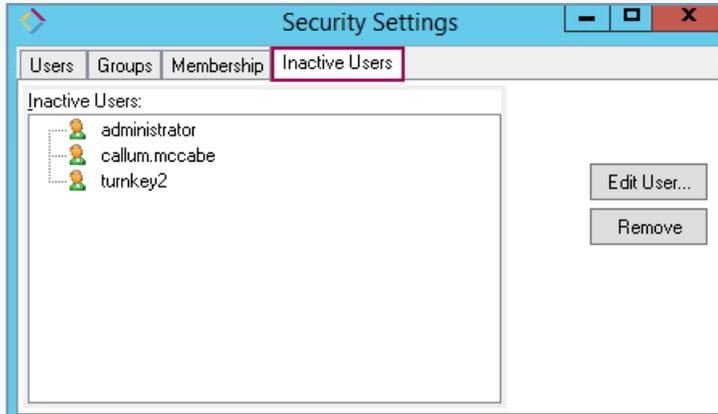
2. Select the User

3. Select **Edit User**
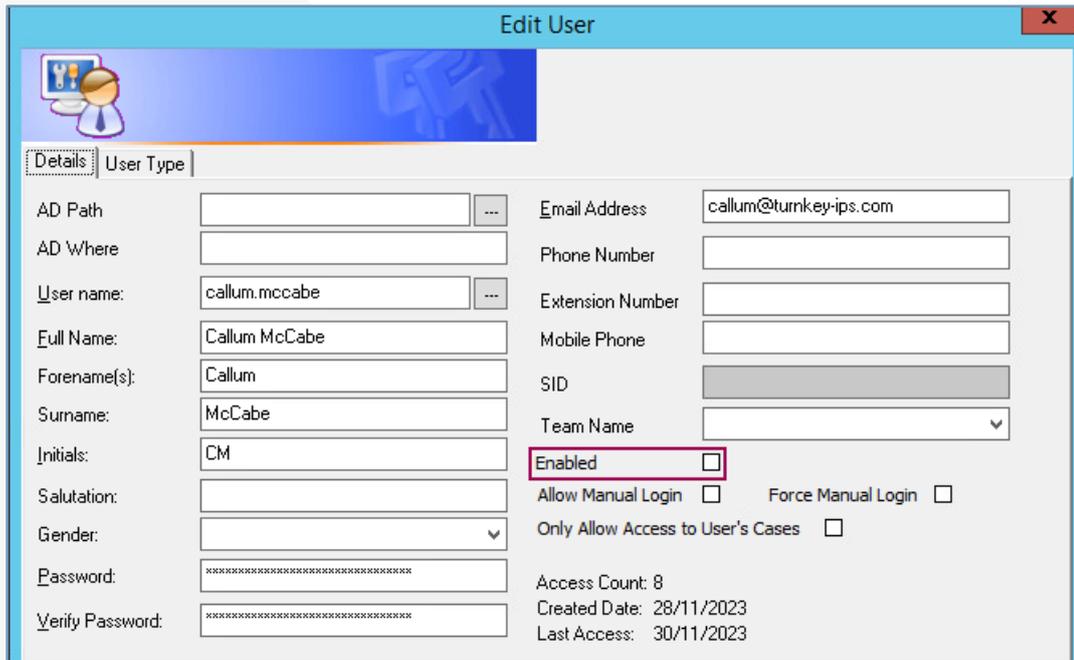
4. Check the enabled box Enabled ☑

5. Select **Ok**

6. Repeat these steps as required

Marking Inactive at the Case level

You may wish to mark users as inactive at the case level in situations where they have been moved to work from a particular case. To do so follow the instructions below.

1. Search for the Case Code

2. Navigate to Case > Setup > Staff

8. Double-click the user

9. Check the Inactive box

10. Select **Save and Close**

11. Repeat these steps as required

Case with Incomplete Meetings

Incomplete meetings will need to be reconstructed in IPS Cloud post migration. The only incomplete meetings should be those where the meeting or decision date is in the future. All Meetings/Decisions where the date is in the past should be appropriately completed prior to migration.

This can be done manually or by, using the available script which will Complete historical meetings, using the meeting date as the completion date. Only run this script if you consider the logic described is appropriate for your cases.

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Cases with Incomplete Meetings*, you can search using Ctrl+F to find this quickly

Manually Completing Meetings

1. Search for the Case Code

2. Navigate to Case > Decision Procedures > Meetings > Meetings

3. Select the Meeting

4. Select **Complete Meeting**

5. Select **Yes**
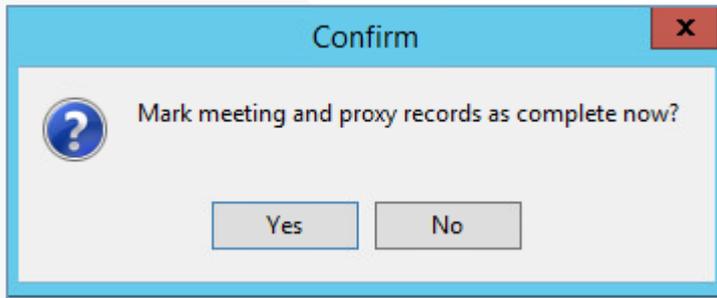
6. Repeat as required until all the records in the list have been addressed

Completing Meetings using the Script

1. Navigate to Practice > Reports > Global Practice > Reports > Onboarding IPS Cloud depending on the installation location
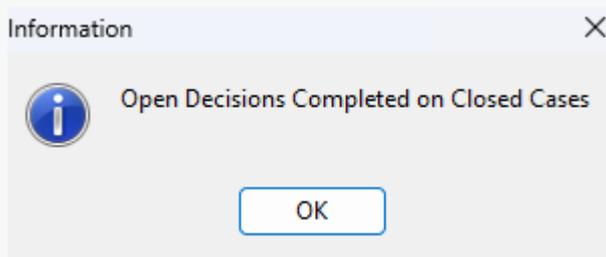
2. Select IPS Cloud Pre-Migration Complete Historical Meetings

3. Select **Yes**
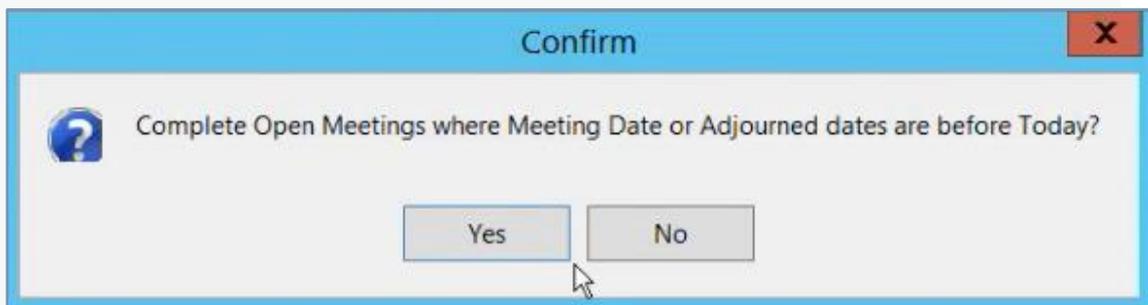
4. Select **Ok**

Case with Incomplete Decisions

There is a script available that when run will update all Incomplete Decisions on Closed Cases. This is recommended as it will reduce the number of outstanding items in this section. After running the script you should run a fresh copy of the Pre-Migration report so that you will be presented with any remaining items that may need attention. Only incomplete decisions where the decision date is on the future should be migrated to IPS Cloud.
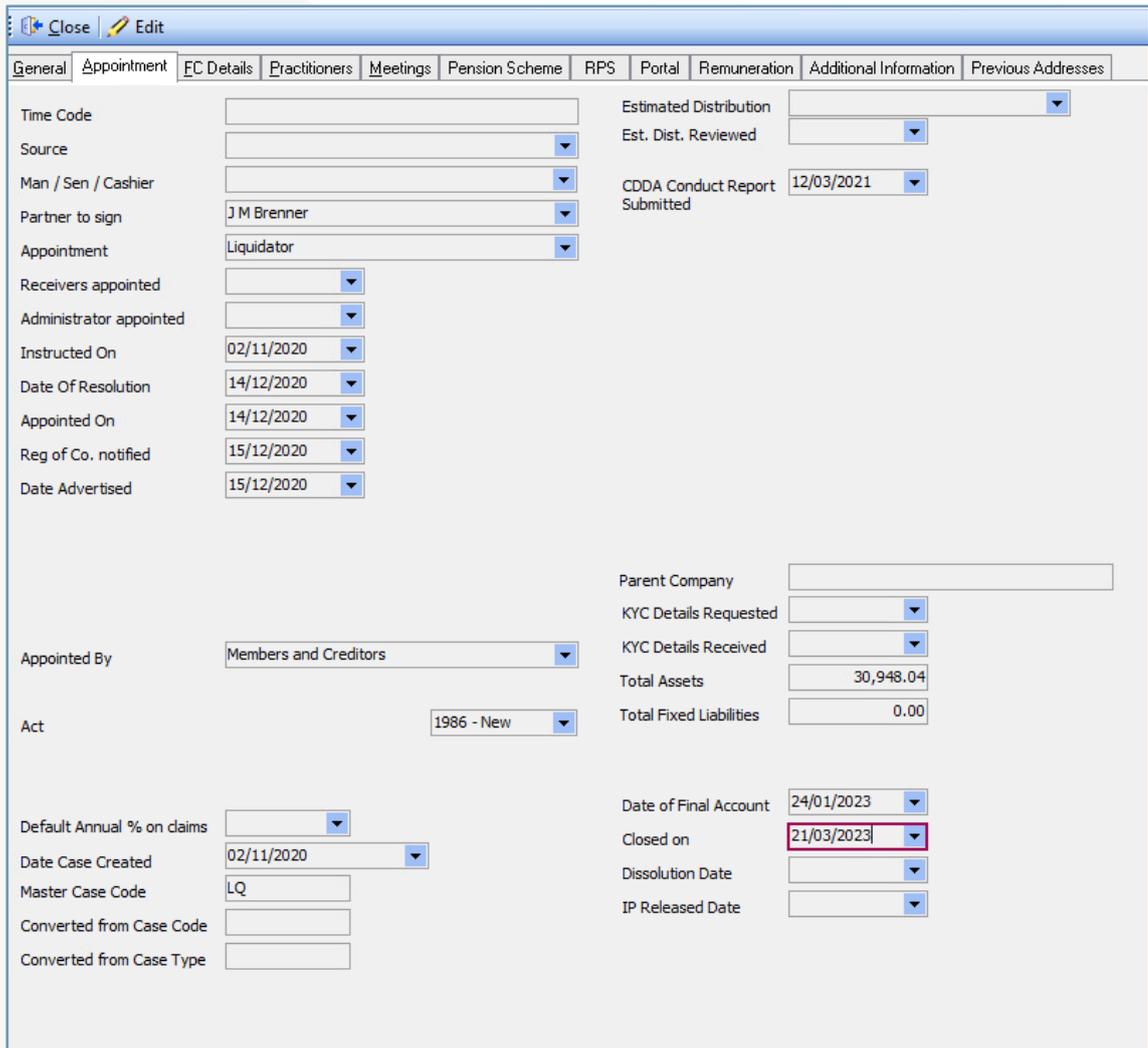
1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Cases with Incomplete Decisions*, you can search using Ctrl+F to find this quickly

Cases with Incomplete Decisions

Case Code	Name	Decision Date	Case Closed	Case Blocked
B098	Bodykraft (Dudley) Limited	16/11/2018	/ /	NO
B098	Bodykraft (Dudley) Limited	03/09/2019	/ /	NO
B098	Bodykraft (Dudley) Limited	14/08/2020	/ /	NO
C2028	Claron Hydraulic Seals Limited	20/11/2025	/ /	NO
DITEST1912 22	Peter Griffen	30/08/2024	/ /	NO
DJP	A Demo Ltd	30/09/2025	/ /	NO
DJP1202	Second Demo Case Ltd	26/02/2025	/ /	NO
DJP1202	Second Demo Case Ltd	26/02/2025	/ /	NO
EWAN_MCM ASTER_BE0 064	Beebee & Leaf Limited	19/08/2025	/ /	NO
PORTAL125	Clear Today Ltd	18/03/2018	/ /	NO
PORTAL125	Clear Today Ltd	11/04/2017	/ /	NO
PORTAL125	Clear Today Ltd	28/07/2017	/ /	NO
PORTAL125	Clear Today Ltd	01/03/2025	/ /	NO
PORTAL125	Clear Today Ltd	31/05/2017	/ /	NO
PORTAL125	Clear Today Ltd	31/08/2017	/ /	NO
PORTAL125	Clear Today Ltd	31/08/2017	/ /	NO
PORTAL125	Clear Today Ltd	21/11/2017	/ /	NO
PORTAL125	Clear Today Ltd	30/11/2018	/ /	NO
PORTAL125	Clear Today Ltd	08/06/2018	/ /	NO
PORTAL125	Clear Today Ltd	11/09/2018	/ /	NO
PORTAL125	Clear Today Ltd	06/12/2018	/ /	NO
PORTAL125	Clear Today Ltd	26/11/2019	/ /	NO
PORTAL125	Clear Today Ltd	26/11/2019	/ /	NO
PORTAL125	Clear Today Ltd	26/11/2019	/ /	NO
PORTAL125	Clear Today Ltd	26/11/2019	/ /	NO
PORTAL125	Clear Today Ltd	30/03/2019	/ /	NO
PORTAL125	Clear Today Ltd	26/11/2019	/ /	NO
PORTAL125	Clear Today Ltd	09/11/2023	/ /	NO
PORTAL125	Clear Today Ltd	23/11/2019	/ /	NO
PORTAL125	Clear Today Ltd	04/03/2020	/ /	NO
PORTAL125	Clear Today Ltd	25/03/2020	/ /	NO
PORTAL125	Clear Today Ltd	30/06/2020	/ /	NO
PORTAL125	Clear Today Ltd	30/06/2020	/ /	NO
PORTAL125	Clear Today Ltd	30/06/2021	/ /	NO
PORTAL125	Clear Today Ltd	31/05/2025	/ /	NO
PORTAL125	Clear Today Ltd	31/05/2025	/ /	NO
PORTALTES TCOPY	NEW PORTAL TEST LTD	27/02/2025	/ /	NO
PORTALTES TCOPY	NEW PORTAL TEST LTD	19/02/2025	/ /	NO
T190	Tai Mon Properties Limited	14/08/2025	/ /	NO
TESTCVL	Test Case CVL Limited	20/08/2025	/ /	NO
TESTCVL	Test Case CVL Limited	18/09/2025	/ /	NO
TESTCVL	Test Case CVL Limited	20/09/2025	/ /	NO
TESTCVL	Test Case CVL Limited	20/09/2025	/ /	NO
TESTD	Jkaba Limited	15/12/2024	/ /	NO

Completing Decisions using the Script

1. Navigate to Practice > Reports > Global Practice > Reports > Onboarding IPS Cloud depending on the installation location

2. Select IPS Cloud Pre-Migration Complete Decisions on Closed Cases

IPS Cloud Pre-Migration Complete Decisions on Closed Cases

3. Select **Yes**

Confirm
Complete Open Decisions on Closed Cases?
Yes   No

4. Select **Ok**
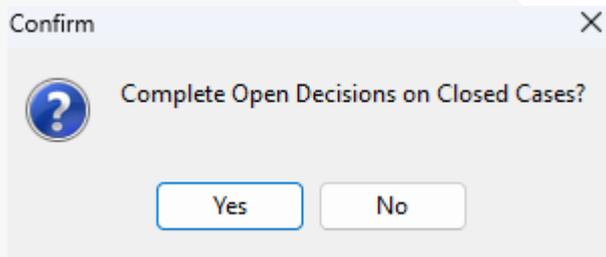
Information
Open Decisions Completed on Closed Cases
OK

Manually Completing Decisions

1. Search for the Case Code

Look for case:

2. Navigate to Case > Decision Procedures > By Decision Process > Decisions

3. Select the Decision

4. Select **Complete Decision**

5. Select **Yes**

6. Repeat as required until all the records in the list have been addressed

Closed Cases with Open Diary Lines

We recommend you use the 'Close Case' option in the 'Case Diary' screen to delete unwanted entries and update required entries appropriately. However, closed cases may have open diary lines for good reason and so this message is advisory only. The implication is that your IPS Cloud dashboard will be populated with notifications that do not necessarily require action.

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Closed Cases with Open Diary Lines (Detail)*, you can search using Ctrl+F to find this quickly

3. Search for the Case Code

Note: You may wish to confirm that the Closed on date was completed in Case Setup as this process will delete all Diary Lines after this date.

4. Navigate to Case > Setup > View Setup Detail

5. Select Appointments

6. Confirm the Closed on Date

7. Navigate to Case > Setup > Diary

8. Select Close Case
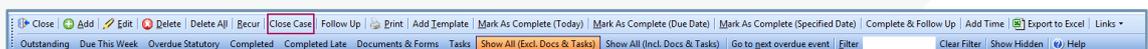
9. Select **Yes**
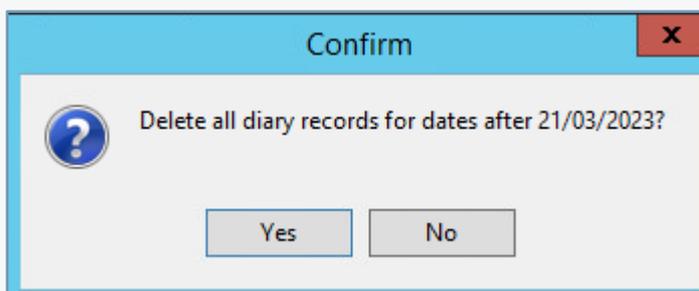
Confirm

Delete all diary records for dates after 21/03/2023?

Yes   No

10. Repeat as required to clear the list

Distinct Missing Bank Account Names Used in Transactions (Open not blocked Cases)

The Bank Account Name is a mandatory field in IPS Cloud, so any accounts which do not contain a name need to be corrected. If this section returns a very large volume of data, your onboarding lead can provide a script that can be run to identify the cases.

No further action is required if you are happy for bank accounts without names to be populated with the case name, this can be corrected at the point of migration. Please advise your onboarding lead of your requirements.

Distinct Missing Bank Account Names used in Transactions (Open not blocked Cases)

Please supply Bank Account Names (Required Field in IPS Cloud)

Sort Code	Account No.
00-00-00	00000000
00-00-00	12121212

Time Entry Specific Test

Time Entry with missing Users

This section of the report will highlight users which have likely been deleted even though they had time entries. It will be necessary to create a new user and assign the missing staff code.

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Distinct Missing Bank Account Names Used in Transactions (Open not blocked Case*s*)*, you can search using Ctrl+F to find this quickly

3. On SQL Navigate to Administration > Security > Security Manager > Users

4. Select **Add User**

5. Enter a Username this can be the same as the Staff Code
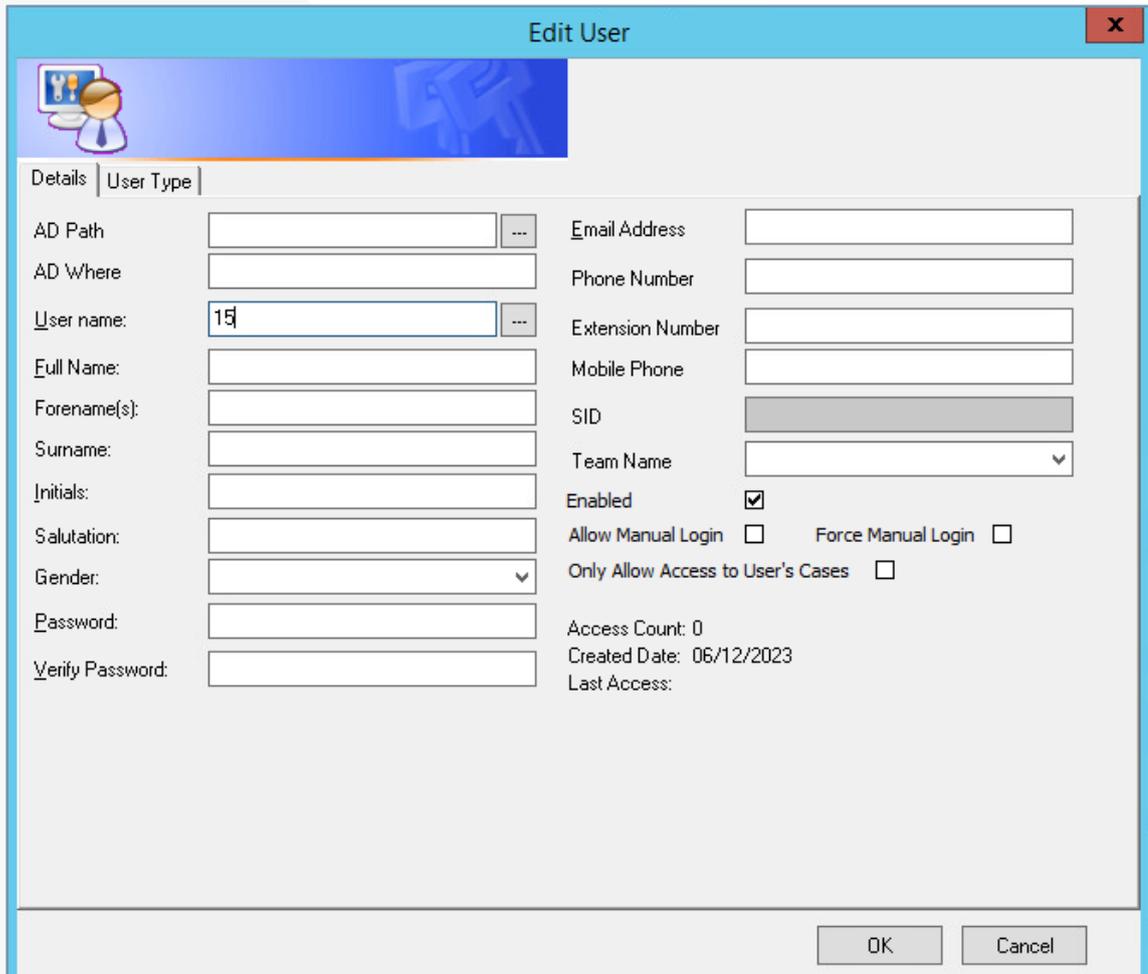
6. Enter the initials

7. Enter a unique email address

   Note: The user must remain enabled to configure the Time Setup

8. Select **Ok**

9. Select the user
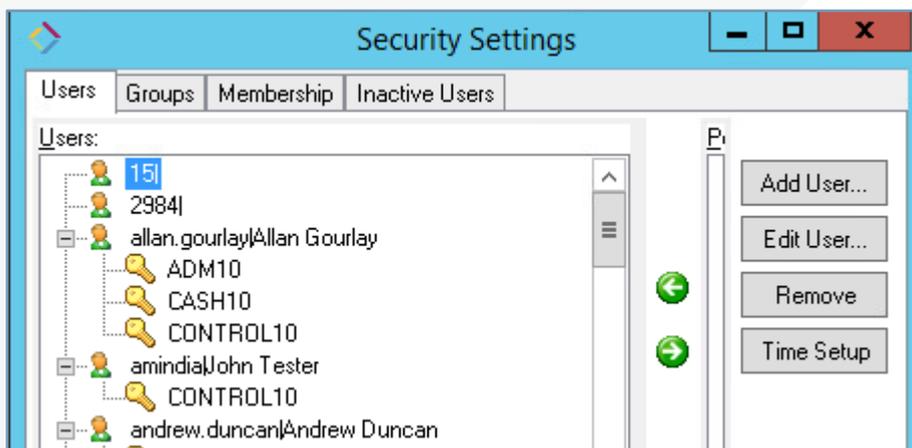
10. Select **Time Setup**
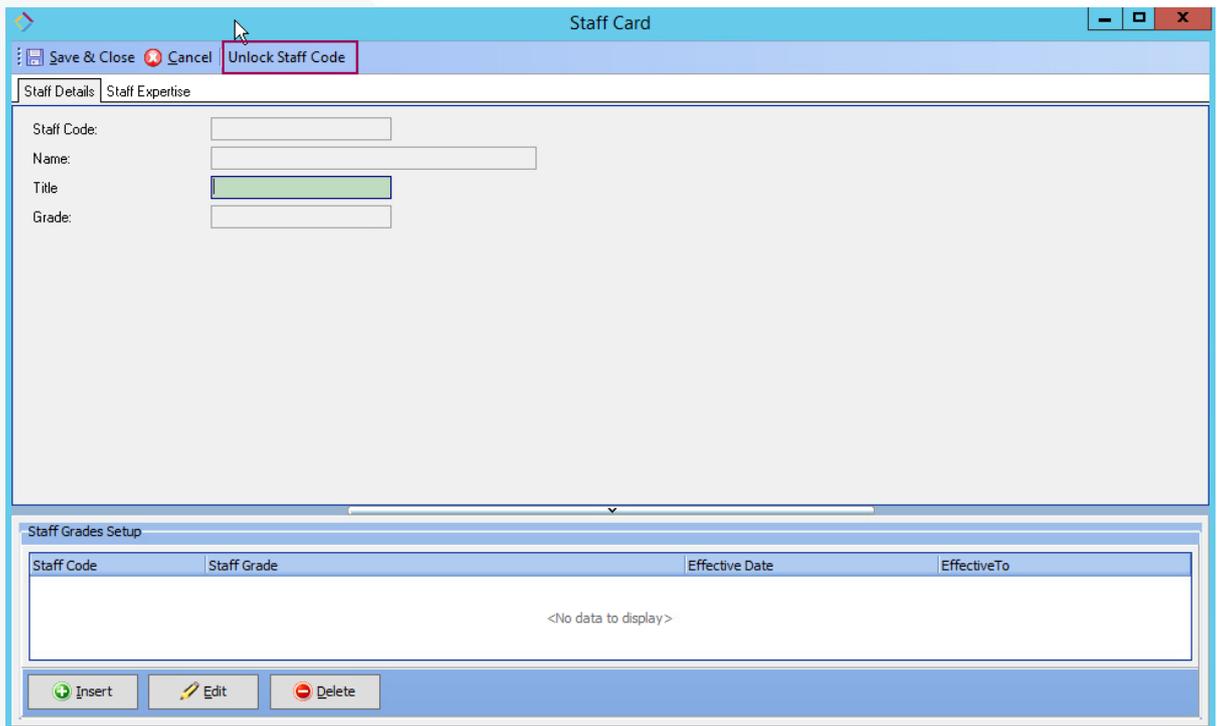
11. Select **Unlock Staf Code**

Note: You should now be able to edit the fields.

12. Enter the Staff Code exactly as it appeared on the report
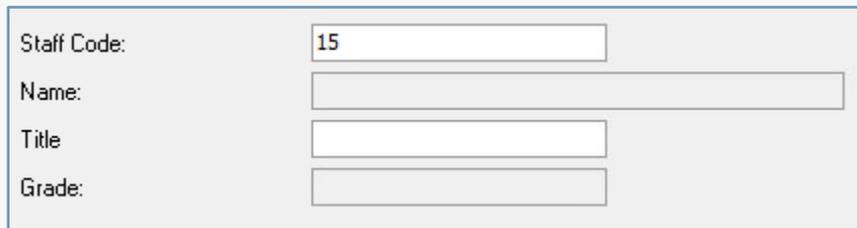
13. Select **Insert**
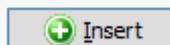
14. Select a Staff Grade
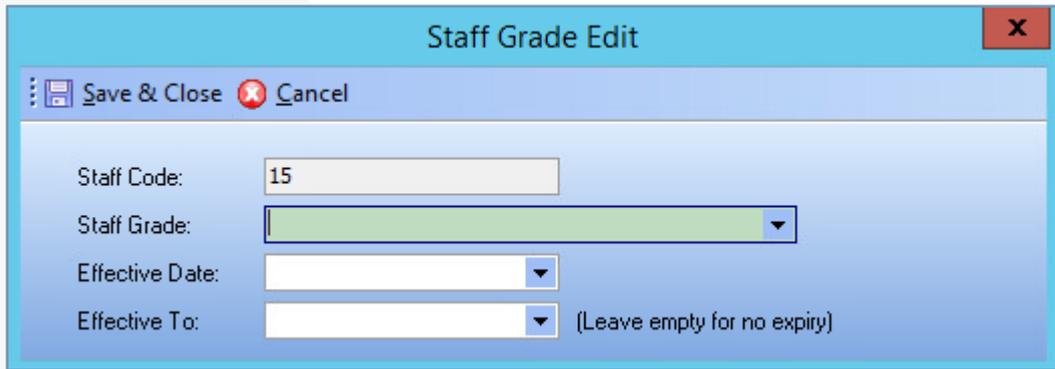
15. Enter the effective Date

    Note: Ensure this covers the period the time entry could have created.
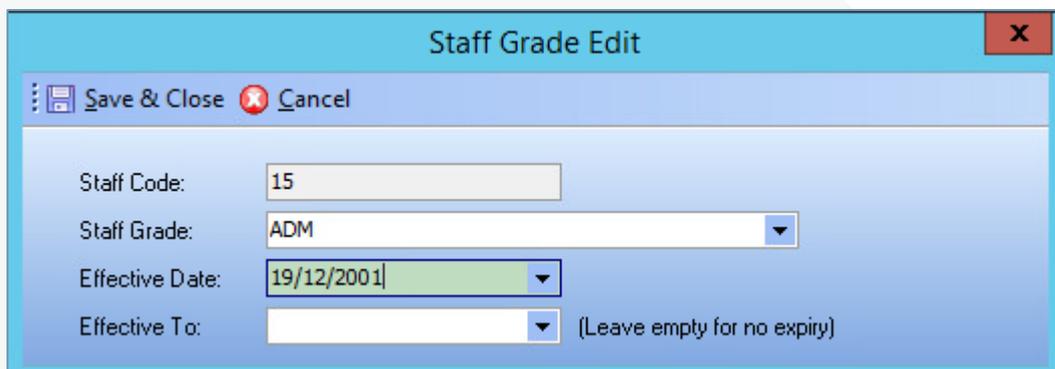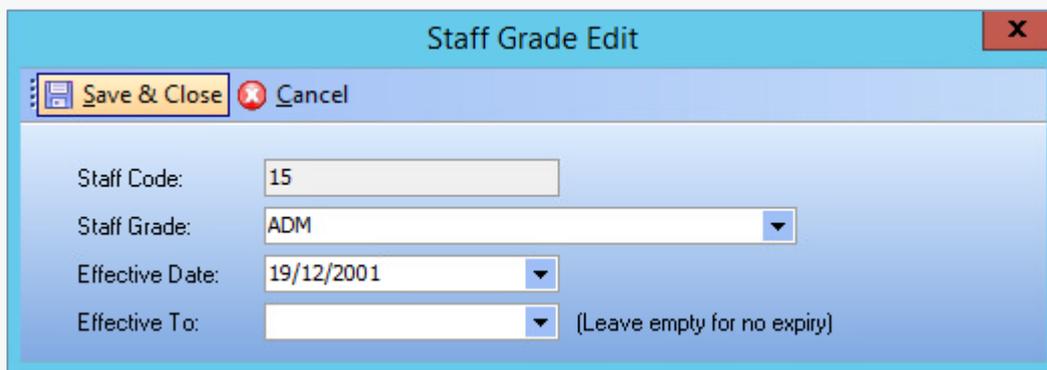
16. Select **Save and Close**

17. Select Save and Close
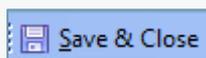
18. Repeat as required until all of the Missing Users have been addressed

Missing Staff Grades

Missing Grades occur when a grade which has been used on a time entry has been deleted. It will be necessary to recreate the Grade and the Grade Rate.

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Missing Staff Grades*, you can search using Ctrl+F to find this quickly

3. On SQL Navigate to Time Recording > Setup > Grades
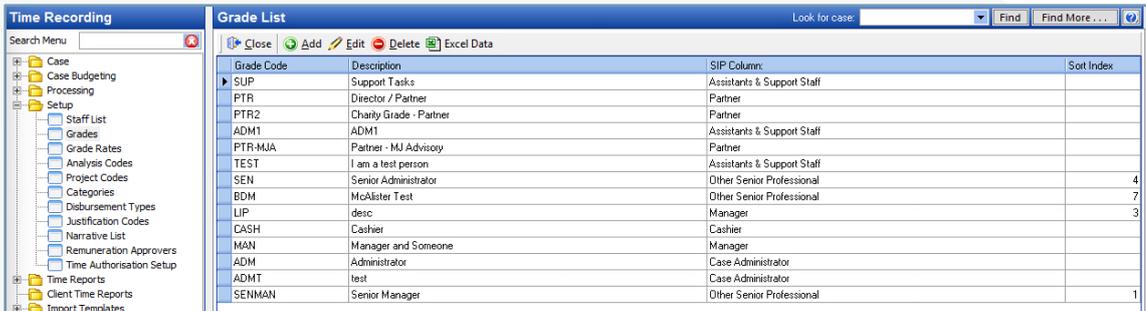
4. Select **Add**

5. Enter the Grade Code exactly as it appears in the report
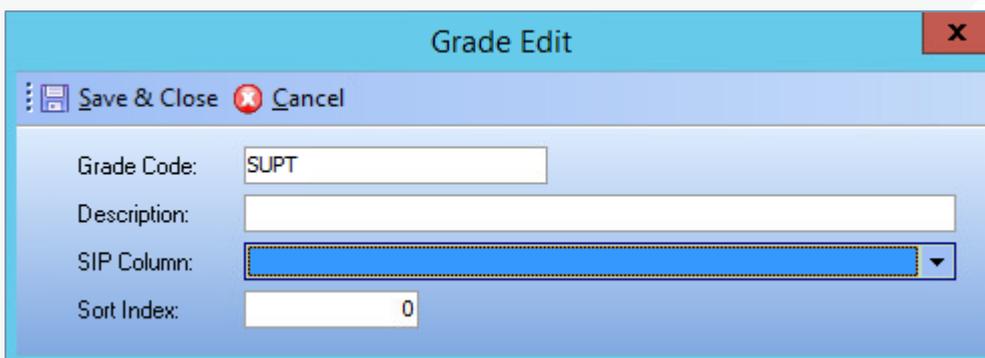
6. Enter the Description

7. Select the SIP Column
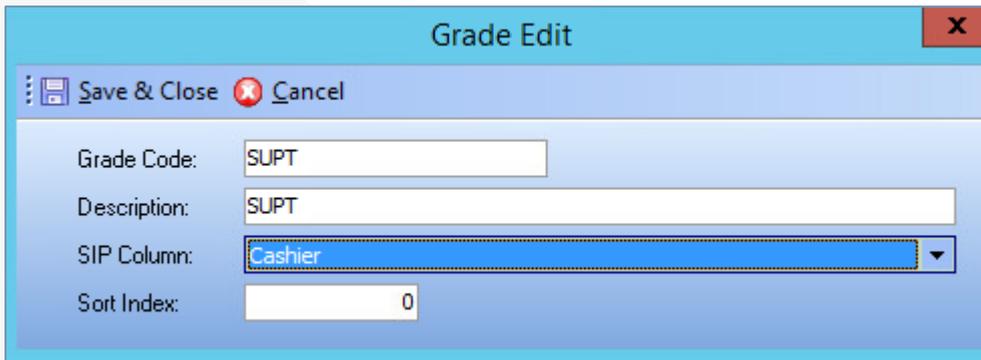
8. Select **Save and Close**

   Note: These Grades will also be missing a Charge Out Rate, however the next section of the report will highlight what these rates should be in order to correct any time entries.

9. Repeat these steps as required until all the Staff Grades have been recreated

Missing Charge Out Rates

Any missing Staff Grades will also need to have the appropraite Charge Out Rates added, there may be multiplechargeout rates associated with each Grade.

1. Any missing Staff Grades will also need to have the appropraite Charge Out Rates added, there may be multiplechargeout rates associated with each Grade.
2.

3. Navigate to *Missing Charge Out Rates*, you can search using Ctrl+F to find this quickly

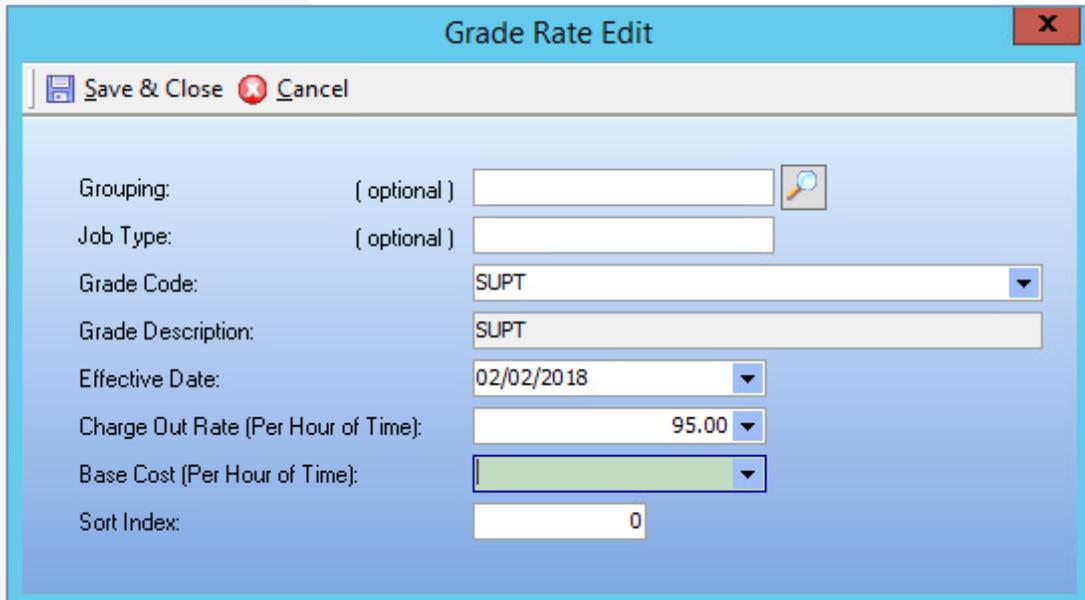4. Navigate to Time Recording > Setup > Grade Rates

5. Select **Add**

6. Select the Grade Code without a Charge Out Rate

7. Enter the Effective Date

   Note: This should be on or before the date listed in the report in order to cover the historic use period of the rate.

8. Enter the Charge Out Rate (Per Hour of Time) this must match the value in the report

9. Select Save and Close

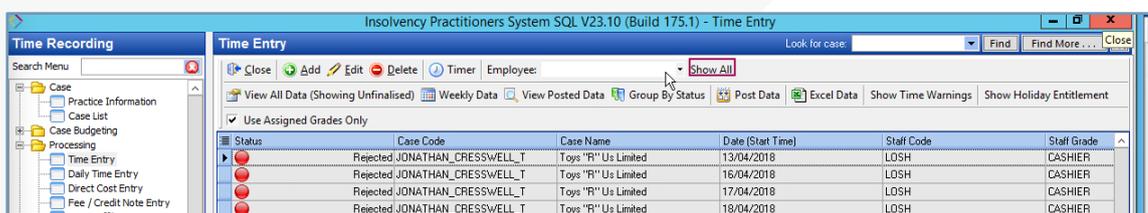10. Repeat these steps as required until all the Charge Out Rates have been recreated

Time with no Units

These are time entries which did not have a value set in units or hours, the minimum value a time entry can be set at is 0.1 unit.

1. Open the Pre-Merge report using a pdf reader

2. Navigate to *Time with no Units*, you can search using Ctrl+F to find this quickly

3. On SQL Navigate to Time Recording > Processing > Time Entry

4. Select **Show All**

5. Select the filter icon on **Time Units**

6. Select **0**
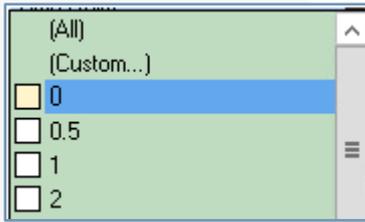
7. Double-click the time entry

8. Change the units to a value equal to or greater than 0.1

9. Select Save and Close

10. Repeat as necessary for the remaining time records without a unit value

Final Actions

You have now cleansed your data in preparation for migrating to IPS Cloud, now rerun the report and confirm that the sections covered in the report all read 'Ok – No Action Required'

1. In SQL Navigate to Practice > Reports > Global or Practice > Reports > Onboarding IPS Cloud depending on the installation location

2. Select **IPS Cloud Pre-Migration Report**

3. In the Default Floating Charge Creditor Account enter **Account Code from Chart of Accounts**

4. In the Default unsecured Creditor Account enter **Account Code from Chart of Accounts**

5. Confirm the following areas are completed:

Users with no Email Address on Case Staff	
Duplicate Emails	
Case Staff with no User Record	
Missing Bond Providers	
Meetings with no Meeting Type	
Case Staff with no Nominee Type	
Missing LQCASESIGN	
Inactive Case Staff On Open Cases	
Case with Incomplete Meetings	
Cases with Incomplete Decisions	
Closed Cases with Open Diary Lines	
Distinct Missing Bank Account Names Used in Transactions (Open not blocked Cases)	
Time Entry Specific Test:	
Time Entry with missing Users	
Missing Staff Grades	
Missing Charge Out Rates	
Time with no Units	