



# One B2B Personnel

last updated for the Summer 2019 release

Handbook

**CAPITA**

## Revision History

Version	Published on
Summer 2019 (3.69) - 1.0	31/05/2019

### Doc Ref

One B2B Personnel Handbook/Summer 2019 (3.69)/31-05-2019

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# 01 | Document Change Control

Date	Release	Description
May 2019	3.69	Document updated and improved to make it more relevant to latest releases.

# 02 | One B2B:Personnel

## Overview

B2B:Personnel is a module within One that enables the bi-directional transfer of service related employee data between One and SIMS.net. B2B:Personnel transfers data for those employees with a current service, a future service and those who have had a service within the last year.

B2B:Personnel transfers data in XML format utilising SOAP (Simple Object Access Protocol) messaging, an industry standard employing Secure Socket Layer (SSL) encryption to guarantee secure transfer of data.

## System Prerequisites

In addition to the purchase of a B2B:Personnel licence from Capita, the following attributes are prerequisites for the successful operation of the module:

- A current One Personnel licence
- Access to a One Web Server

To ensure that there are no issues and the new data is successfully transferred via B2B:Personnel, schools that are licensed to run B2B:Personnel must ensure that:

- They upgrade to SIMS to the appropriate version at the same time that their Local Authority upgrade their One version. For more information on B2B:Personnel compatibility between different versions of One and SIMS, refer to the latest release note available from the One Publications website (<https://www.onepublications.com>).
- The Local Authority has requested Capita to upgrade their web server.

## B2B:Personnel Data Request

Each school participating in the B2B:Personnel process is required to set scheduled tasks for **Import** and **Export** transfers. The **Day** and **Time** must be set for when the school wishes to receive data from the Local Authority and when they wish to send data to the Local Authority. Each task must be defined separately.

The SIMS.net school always initiates the communication between the two systems. The school sends a request to the web server to upload XML messages into One. Likewise, it is the school that makes the request to the web server to download any messages from the One system.

## XML Message Status Types

### XML Message Status Types

There are status types associated with each message. The message status is displayed in the relevant **Suspense Processing** window. Below are example status types that can be generated for imported/exported XML messages:

- No Change
- Change
- Delete
- Rejected Change
- Rejected Delete

- Rejected Rejected Change
- Rejected Rejected Delete

See the [Suspense Processing](#) help topic on page 29 or the [Glossary](#) on page 73 for a definition of XML message types.

## Data Transferred via B2B:Personnel

The data transferred is divided into data groups. Data groups contain data items.

Data Item	Description
<b>Core Identifiers</b>	Legal Surname, Legal Forename, Date of Birth, Gender and National Insurance Number (if this is held in the One system).
<b>Basic Details</b>	Title, Surname, Forename, Middle Name(s) and Ethnicity
<b>Employment Details</b>	Employee Payroll Number, Continuous Service Start Date, Local Authority Start Date, Teacher Status and Teacher Number, HLTA Status, HLTA Date and QTS Route
<b>Payee Information</b>	Bank Sort Code and Bank Account Number
<b>Address</b>	Address Type, Start Date, End Date, Apartment, House Number, House Name, Street, District, Town, County and Post Code
<b>Service</b>	Service Start Date, Service End Date, Employment Type, Hours Per Week, Weeks Per Year, Payroll Number, Post, Service Term, Superannuation and Service Termination Reason, Origin, Destination and Salary Rate
<b>Roles</b>	Role Code, Start Date and End Date
<b>Suspension</b>	Start Date, End Date and Reason
<b>Scales</b>	Scale Start Date, Scale End Date, Scale Code, Scale Point and Salary Amount
<b>Allowances</b>	Allowance Code, Allowance Start Date, Allowance End Date, Allowance FTE, Allowance Amount and Allowance Type
<b>Telephone</b>	Telephone data is transferred as a collection. This can be one or many instances of Device (Fax or Telephone), Telephone Number and Location (Home, Work, Mobile) per employee. <b>Note:</b> P7 exports telephone data but One does not.
<b>Absences</b>	Absence Type, Illness Category, Pay Rate, Start Date, Start Time, End Date, End Time, Days Absent, Hours Absent, Industrial Injury, SSP Exclusion and Annual Leave
<b>Qualifications</b>	Qualification, Date awarded, Subject, Second Subject, Level, Class of Degree, Country of Origin, Title, Verified
<b>Previous Names</b>	Previous Names are transferred as a collection. This can be one or many instances of <b>Legal Surname, Legal Forename, Surname, Forename, Middle Name(s)</b> and <b>Date of Change</b> per employee

**NOTE:** With each data item there is also a comment (up to 250 characters in length) explaining why the data in the message has been rejected.

## Licences and Permissions

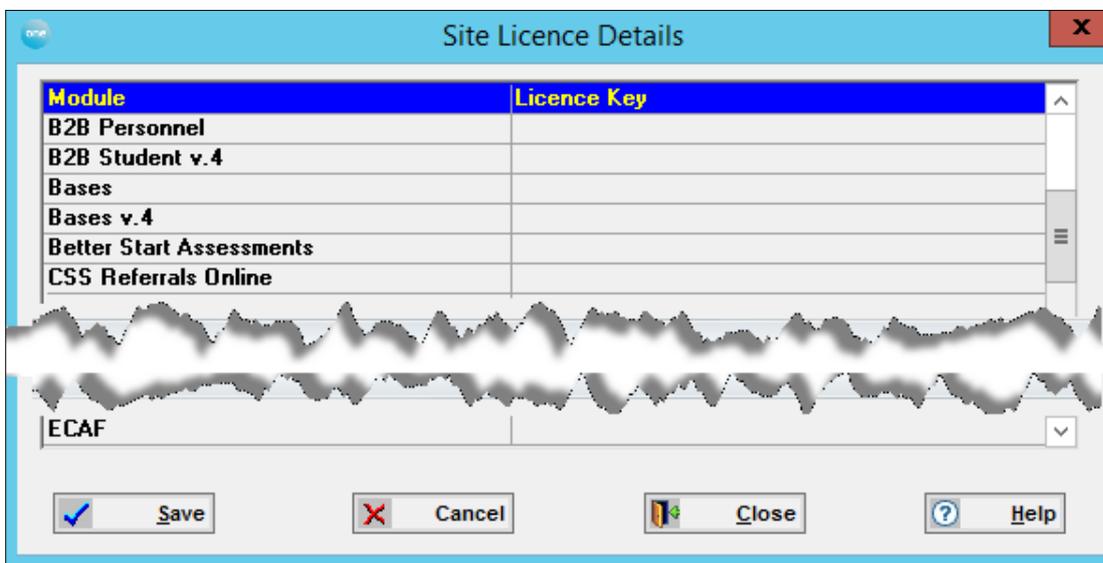
### V3 client | Tools | Licensing

B2B:Personnel is a One module which requires a licence to be purchased.

To activate the licence:

1. Log into v3 client and select **Tools | Licensing**.
2. Search for B2B Personnel.
3. Enter the licence key.
4. Click the **Save** button.
5. Log out of One and then log in again to ensure that the licence is activated.

**NOTE:** If a valid licence key is not entered in One then all related windows in **One Personnel | Module | Administration** are read only.



Once the licence has been activated, all B2B tab pages are enabled in **Module Administration**. These comprise: **B2B Import/Export**, **B2B Error Log**, **B2B People Match**, **Suspense**, **Field Processing**, **Job Progress** and **B2B Activity Log**.

## Audit Trail

### V3 client | Tools | System Administration | Auditing

Audit tracking may be enabled in System Administration for data in the B2B:Personnel tables.

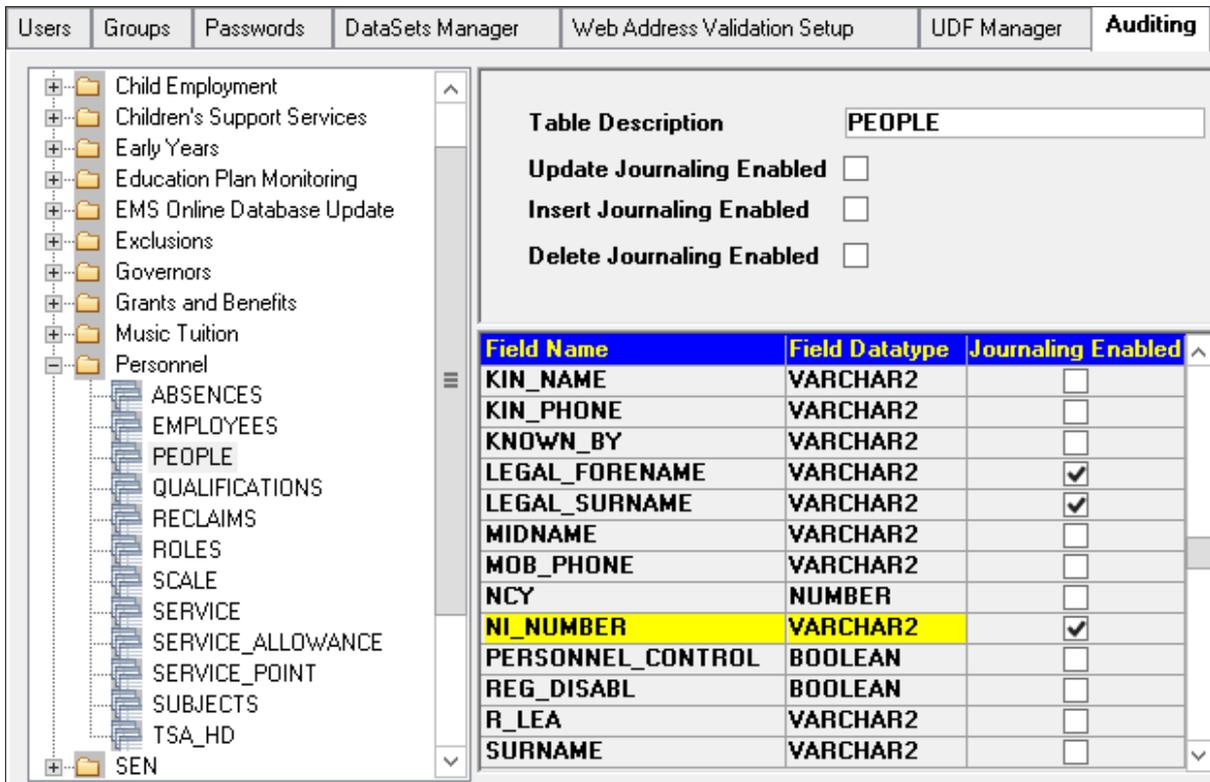
The basic purpose of an Audit Trail is to monitor the data being added, modified or deleted by users of the One system.

The System Administrator can choose to enable or disable each of the areas for auditing. This ensures that disk space is not taken up with audit data in areas where they are not required.

To activate Auditing:

1. Log into v3 client and select **Tools | System Administration**.
2. Search for Personnel in the left panel and click + to expand.
3. Select the table required. This displays **Field Name**, **Field Datatype** and the **Journaling Enabled** checkboxes.

4. Select the required **Field Name(s)** and tick the checkbox(es).
5. Select the type of journaling required: **Update Journaling**, **Insert Journaling**, **Delete Journaling**
6. **Save** the changes by clicking the tick in the top right corner.



The journaling options are as follows:

Journaling	Description
<b>Update Journaling Enabled</b>	If this is selected then data is logged into the audit trail when any field with journaling enabled is modified.
<b>Insert Journaling Enabled</b>	If this is selected then data is logged into the audit trail when any field with journaling enabled is inserted
<b>Delete Journaling Enabled</b>	If this is selected then data is logged into the audit trail when any field with journaling enabled is deleted

All changes are recorded in the Audit\_Trail table. Checking the appropriate journaling options will show the changes in the Audit report. Each area is disabled by default.

If the **Auditing** option is unchecked and saved before being re-checked at a later date, the previous audit records are automatically deleted.

Each option is independent of each other, e.g. if **Insert** is selected but not **Update**, then new records added to the database are shown in the audit report but any updates to that record are ignored. It is therefore possible to keep track of students added to, and/or deleted from One whilst limiting the size of the audit trail table.

The Audit report is available by clicking the **Quick Report Tool** button on the **Focus Bar**.





# 03 | B2B:Personnel Setup in Module Administration

## Issuing user names and passwords

### V4 client | Tools | Administration | User Management

A user name and password needs to be set up for every school that will be running B2B:Personnel.

**NOTE:** The user name and password need to be sent to each school along with the One Web Server URL, otherwise it will not be possible for the school to connect to the One Web server in order to transfer data via B2B:Personnel.

To create User Accounts and Groups:

1. Log into v4 client and select **Tools | Administration | User Management**.
2. Select the option required.

#### ■ User Accounts

- Click the **New** button
- Enter a **User Name**, **User Description** and **Password**. Other information can be added as required.

- Click **Save**.

#### ■ User Groups

School groups should be set up and populated with users. Users can be added or removed from the Group when required.

- Click the **New** button
- Enter a **Group Name** and **Description**



- In **02. Group Members** click the **Add** button and select users as required.

✔ Select		✔ Select All	
User Name	User Description	Active	Select
8234321	Green Abbey School	T	<input checked="" type="checkbox"/>

The user can also search by **User Name**, **User Description**, **Mapped Base Name** or **Mapped Base Type**. **Mapped Base Name** opens a **Base Enquiry** pop-up whilst **Mapped Base Type** offers a drop-down list to select from.

- In **03. Group Administrators** click the **Add** button and select users as required (as per **Group Members** above).
- Click **Save**.

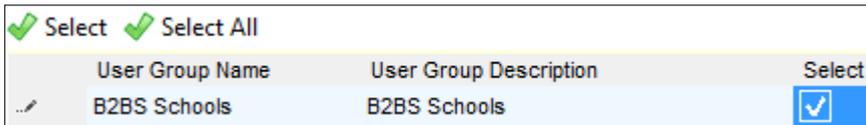
### ■ Batch Create Users

The purpose of this sub-tab is to create School User IDs to give Schools access to One Online and B2B:Personnel functionality. It allows a group of different users at a school to logon using the same ID and Password. The following process may be repeated entering a **User Suffix** parameter to generate multiple School User IDs for the same School.

It allows users to select individual **Schools**, **All Schools** or **Schools by Type**, then batch create User IDs for those selected.

- In **01. Base Population**, select either **All LA Bases** or **Only LA Bases for Base Type** – this option offers a drop-down list to select from

- Click **Search**
- Select the school(s) from the list or click **Select / Deselect All**
- In **02. User Account Parameters** click **Add** which opens a **Select Group(s)** pop-up. Select groups as required.



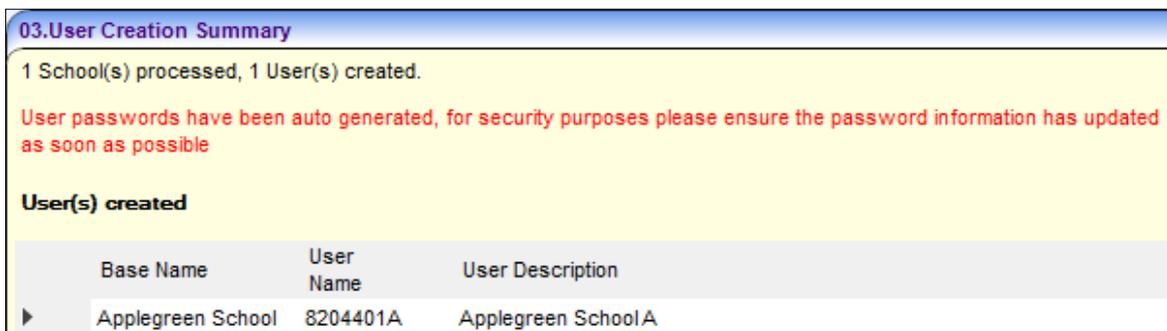
- Click **User Name Suffix** if required.

The suffix may be any alphanumeric character. This facility gives the Local Authority the ability to repeat the creation process and create multiple user IDs for a school, optionally in a different group with different navigation rights. The suffix is added to both the user ID and the user name.

- Click **Create User(s)**

This button will only become active once at least one base and one user group have been selected.

When the process is complete the new user IDs are displayed in the **User Creation Summary** section.



**NOTE:** A **User ID** is made up of the LA number and the school number. If a user suffix parameter was entered this is appended to the ID. When a user ID is created by the process, an encrypted password is generated and stored in the database.

**Note: Passwords**

In order to determine the password(s) for a school an Excel spreadsheet is included on the Release CD under the Documents directory (Batch Create User Password.xls). The spreadsheet allows the Local Authority to enter their Local Authority Number and the School Number, after which a list of passwords for all generated user IDs (with and without suffixes) is displayed.

Schools are advised to change their initial passwords after first logging in to the One Online system or B2B:Personnel.

## Assigning User Rights for B2B:Personnel

### V3 client | Tools | System Administration | Users | User Rights

Each user can be assigned personal access rights. Setting user rights allows the Local Authority to control individual access to B2B:Personnel tabs and processes.

Rights are assigned on a per dataset basis. Therefore, if a user is given access to multiple datasets their rights must be defined in each of those datasets.

Some buttons throughout the module, e.g. the **Drill-down** button, are greyed out if the user does not have an appropriate access level.

If user rights are changed for either an individual the changes will not take effect until the next login.

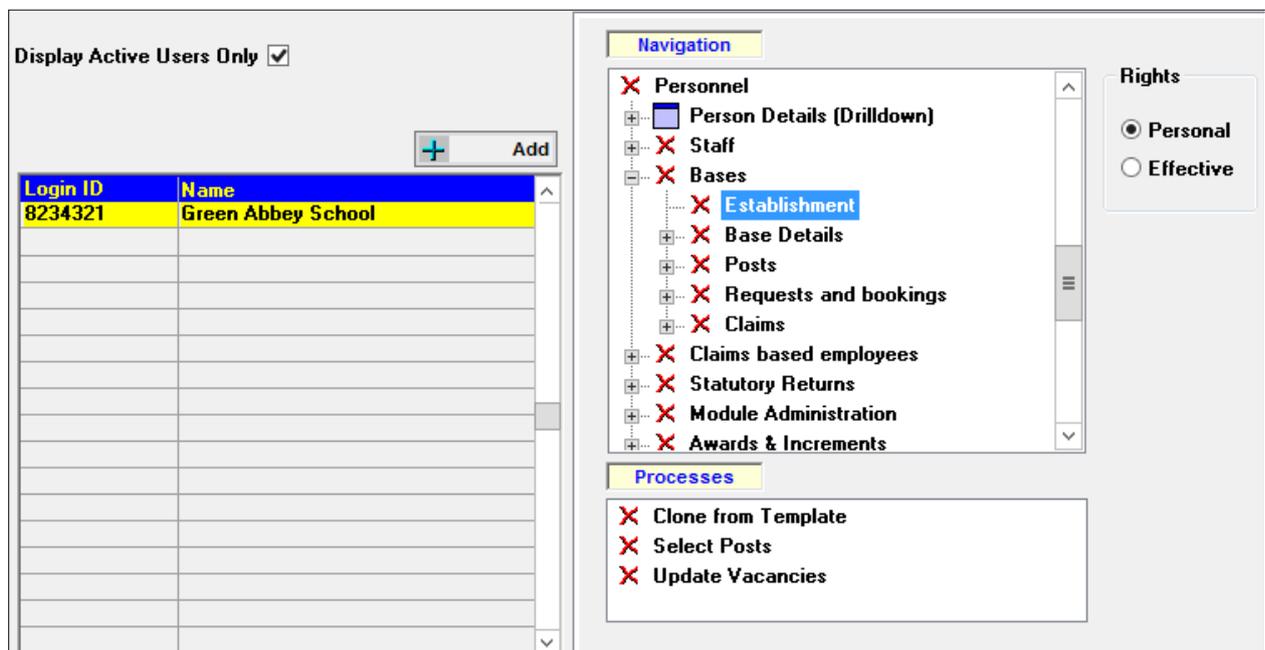
To assign User Rights:

1. Log into v3 client and select **Tools | System Administration | Users**.
2. From the left panel, select the user.
3. In the **Navigation** panel, select **Personnel**.
4. Select the area required and click the + icon to expand (where applicable)
5. Select an item from the expanded list to amend the user rights.

If a process can be initiated from a tab, when that tab name is highlighted in the **Navigation** box, any executable processes will be listed in the **Processes** box. User rights are applied to **Processes** in the same manner as tab level access.

The **Processes** will be prefixed with a red cross; to apply user access rights, click the right mouse button on the red cross to change it to a blue tick. This will allow the user to execute the process

6. **Save** the changes by clicking the tick in the top right corner.



## Assigning Group Rights for B2B:Personnel

### V3 client | Tools | System Administration | Groups | Group Rights

Groups can be assigned access rights in the same way as users. In this way all members of the group can be given the same access rights.

To assign Group Rights, go to **Tools | System Administration | Groups** and follow the process outlined above.

## Setting up Bases as B2B:Personnel Bases

### V4 online | Bases

Every base that is to exchange data through B2B:Personnel should have the **B2B:Personnel Base** checkbox ticked. This checkbox is located on the **Base Details** tab.

With **Personnel Base** checked, that base is enabled to run B2B:Personnel. If this checkbox is not checked then any data received from this base will not be accepted.

**NOTE:** B2B:Personnel is sold as a separate product, therefore a licence must be purchased from Capita.

To make a base into a B2B:Personnel base:

1. Log into v4 online and click the **Bases** icon.
2. Search for and select the base required.
3. In the **Base Details** tab, click **Edit**.
4. In the **Additional Information** section, tick the **B2B Personnel Base** checkbox.
5. Click **Save**.

Base Details	Base Contacts	Opening Times	Sites (2)	PAN	Areas	Ofsted & Awards
<p>▼ <b>Statutory Information</b>  <a href="#">Edit</a></p> <p>Former Control: LEA Controlled      Statutory Return Group: LEA School            Education Office: CT Region      URN: 0            Nursery Type:      Cost Centre: F45678            Governing Body: Green Abbey School   <a href="#">Memo</a></p> <p>▼ <b>Additional Information</b></p> <p>Teaching Medium: English      Employment Type: N/A            XML Transfer Base: Yes      LA Gateway: No  <b>B2B Personnel Base: Yes</b>      In Statutory Return: Yes            Children's Centre: No</p>						

## Field Processing Rules

### V3 client | Personnel | Module Administration | Field Processing.

This tab specifies how employee data is to be treated during the **Import** process.

If functionality is not available on this tab, check that the Local Authority holds a current **B2B Personnel licence** and that you have been assigned the correct user rights.

The full range of data groups are as follows:

- Core Identifiers
- Basic Detail
- Qualifications
- Payee Information
- Address
- Contracts
  - Scale
  - Allowance
  - Suspensions
  - Roles
- Name History

- Telephone
- Employment Details
- Absences

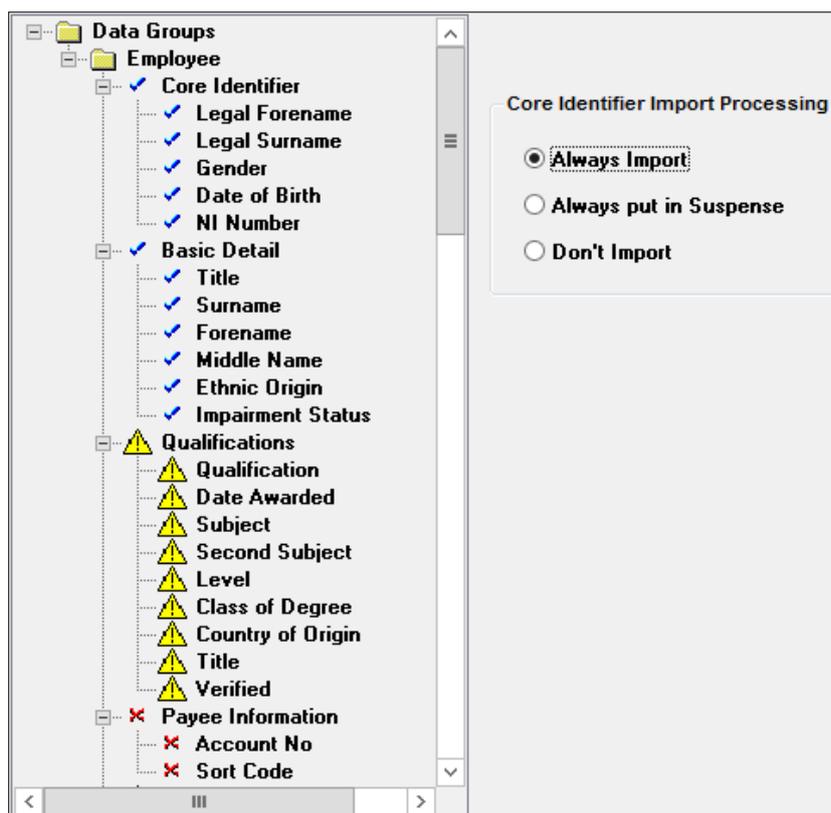
The data groups relate to equivalent tabs or sections in the **Suspense Processing** tab set. The **Import Processing** options for each data group are:

- Always Import
- Always Put in Suspense
- Don't Import.

Before data can be imported from schools the **Field Processing Rules** must be defined to determine how the incoming data (from schools) will be processed.

To set the **Field Processing Rules**:

1. Log into v3 client and click the **Personnel** icon
2. Select **Tools | Module Administration | Field Processing**.
3. Expand the **Data Groups** using the **+** icon and select the required data group.
4. Select the **Import Processing** rule as required by clicking the radio buttons.
5. Save the change by clicking the blue tick at the top right of the screen.



**NOTE:** Field Processing Rules are set at data group level; therefore the Field Processing Rule defined for a data group is applicable to all the data items within that data group.

## Field Processing Rules

Import Rule	Description
<b>Always Import</b> (blue tick)	If the radio button for this rule is selected for a <b>Data Group</b> then the incoming data for that group will always be directly imported into the One system. The incoming data will overwrite the data that is held in the system, unless it has the same value. In this case it will just be ignored.
<b>Always Put In Suspense</b> (yellow triangle)	<p>Selecting this radio button for a <b>Data Group</b> means that if the incoming data is different to the data held in One, the incoming data group and data items are placed in suspense. Any data that is placed in suspense must be processed manually using the <b>Suspense Processing</b> routines. If the incoming data is the same as the data in One it will be ignored.</p> <p><i>Note: By default, the <b>Field Processing Rules</b> for all the data groups are set to <b>Always Put in Suspense</b>.</i></p>
<b>Don't Import</b> (red cross)	Selecting this radio button for a <b>Data Group</b> means that the incoming data is always ignored by One and is cleared from the One inbound table(s). Core Identifiers are the only exception - this group will always be imported.

There are various scenarios which affect associated data items when one item is set to **Don't Import**.

- Where the **Core Identifiers, Employment Details, Contracts, Scales, Allowances** and/or **Basic Details** data groups are set to **Do Not Import**, unmatched employees are placed into the **B2B People Match** screen.
- When **Adding** the unmatched employees as new employees, all incoming data sent for this employee is updated.
- When an unmatched employee is **Matched** to an existing employee this data is processed as per Field Processing rules.

## B2B Activity Log

### V3 client | Personnel | Module Administration | B2B Activity Log

The Activity Log keeps a record of all B2B:Personnel transfer activity. These records are stored in the **B2BP\_ACTIVITY\_LOG** table.

The selection of B2B records displayed in the Activity Log may be filtered as follows:

- Show activities since [date] - displays the current system date by default
- B2B:Personnel Bases with
  - Import
  - No Import
  - Export
  - No Export
  - Import and Export
  - No Import & no Export
- Base Type – selecting the checkbox will open a pop-up of Base Types
- Education Office – selecting the checkbox will open a pop-up of Education Offices

There is an additional filter:

- Show only latest activity for each Base – this will only show the most recent job that meets the current **Selection** and **Filter** criteria.

The browse will only show records with data matching the criteria selected.

The records are displayed by default in **Base Name**. To search for individual records, enter the name of the record into the **Looking For** search field. Each record contains the following details: **Base Name**, **LA No.**, **School No.**, **Activity Date/Time** and **Process Type** (Import/Export).

Search results may be sorted by all populated columns, e.g. **Creation Date**, **Base Name**, **File Name**, by clicking on the column heading.

Click the **List Activities** button to populate the Activity Log browse. This will display Activity records according to the criteria selected.

Click the **Print** button to print the contents of the Log window.

Click the **Delete** button to delete the selected item in the browse.

The screenshot shows a web-based interface for searching activity records. It includes a 'Show activities since' date picker set to 20/04/2019, a 'Selection' dropdown set to 'B2B:Personnel Bases with No Import', and a 'Filter' section with checkboxes for 'Base Type' and 'Education Office'. A 'List Activities' button is present. Below the filters is a 'Looking for:' search field. The main area displays a table with the following data:

Base Name	LA No.	Base No.
FSM Portal	820	9999
Green Abbey School	820	4321

At the bottom of the interface are 'Print' and 'Delete' buttons.

## Synchronisation of Lookups

B2B:Personnel requires you to synchronise the lookups between your Local Authority and your schools. This can be done manually or by using the SIMS Lookup Builder developed by Capita.

If lookup codes are not synchronised (i.e. aligned so that the values for each lookup code are the same in both SIMS.net and One Personnel) between both systems, then the data is put into suspense when the messages are transferred. The user is prompted to reject the data values that do not match any of the pre-defined values within the lookup tables, as they are not recognised by One.

### Lookup Builder

The Lookup Builder is an Excel-based application that enables users at the Local Authority to define and generate the lookup codes required in SIMS.net. These lookup codes are generated as an XML file for import into SIMS.net. Once generated, the XML file and a Signature file (for authentication) can be disseminated electronically to the SIMS.net schools for import via their Lookup Importer utility.

Adopting this approach enables the SIMS and One teams at the Local Authority to define an agreed set of lookup codes that are relevant for both systems and allow alignment between the two, removing the risk of issues related to inconsistent lookup values.

**IMPORTANT NOTE:** An additional **LA Classification** field has been added to the **Qualifications** panel. This field is only visible for those schools that are licensed to use B2B:Personnel. The **LA Classification** field is mandatory for B2B:Personnel licenses and is transferred between the schools and their LA.

Schools and Local Authorities must liaise to ensure that the codes used for the new **LA Classification** field in the school are the same as the codes in the **Qualification** field in the One Personnel module.

**NOTE:** For more information on the SIMS Lookup Builder, please contact the SIMS.net Support Team.



# 04 | B2B:Personnel Functionality

## Initial Data Synchronisation

Prior to using B2B:Personnel to track and send everyday changes to employee details, it is imperative that the school and the Local Authority databases are brought into alignment through an initial exchange of data. Without this synchronisation of data between the two systems, links between the records for each employee within both systems cannot be established and thus changes made in one system will not be reflected in the other system.

To align the two systems, it is necessary for the Local Authority and the school to agree which system currently holds the most accurate and up-to-date data on the employees within the school. They can then use that set of data as the prime records to be shared in the initial data synchronisation.

If it is agreed that One holds the most accurate set of data, then it is recommended that the Local Authority conducts an **All Employee Export** from One so that the school can import this set of data to replace its own records. If however it is decided that the school has the most accurate set of data, then the school should conduct an **All Employee Export** from SIMS.net (see SIMS User Handbook) The Local Authority should then perform an **All Employee Import**.

It is important to note that only once this process has been completed can the Local Authority and school start to use B2B:Personnel and take advantage of the benefits to be gained from its use.

**IMPORTANT NOTE:** *It is anticipated that this process will only be used once or twice a year. For example, it may be that the Local Authority wishes its schools to send all employee records at the start of each academic year or where there is a new school with new employee Service Services.*

**NOTE:** *Employees refers to those people in the One database that have a current service, a future service or a service that has closed within the last 12 months attached to their record.*

## Export All Employee Data

### V3 client | Personnel | Module Administration | B2B Import/Export

This tab allows the One user to export all employee data held in the One system to the SIMS.net system in schools.

Users can only export employee data for a base that has been activated to run B2B:Personnel. (Base activation is done in the **Bases** module. For more information, see [Licences and Permissions](#) on page 6.

**Export**

B2B:Personnel Selected Base   

 **Export**

Data for all Employees with valid Service Contract(s) at the selected B2B:Personnel Base will be exported to that Base.

Data waiting to be exported

Base Name	All Employees	Number of Employees	Date / Time of Change

### Exporting All Employee Data to Selected Base

To make bases ready for export:

1. Log into v3 client and select the **Personnel** icon.
2. Go to **Tools | Module Administration | B2B Import/Export**
3. Click the magnifying glass next to the **B2B:Personnel Selected Base** field in the **Export** panel.

This will display a popup list of all the bases that have permissions to run B2B:Personnel and have been activated as a B2B Personnel base.

**Select a Base**

**Selection**

All Bases

LEA Bases

**Display**

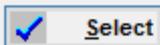
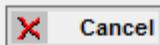
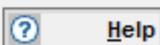
Order by Base Name

Order by School No.

Looking for:



Base Name	Base type	School No.	LEA No.
Green Abbey School	SEC	4321	820

4. Search for the required base and highlight it.
5. Click the **Select** button. This will populate the **B2B:Personnel Selected Base** field.

**Export**

B2B:Personnel Selected Base   

 **Export**

6. Click the **Export** button.
7. A confirmation message will be displayed. Click **Yes** to send the employee data to the outbound queue. The data will be imported by SIMS.net during the next scheduled SIMS import.



The process can be repeated as many times as required to add other bases to the outbound queue.

### Data Waiting to be Exported

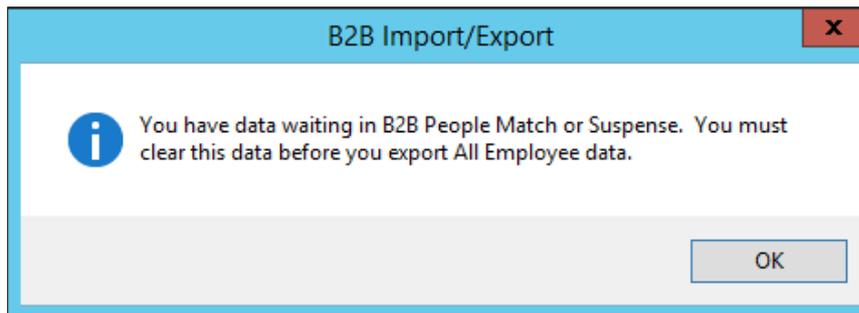
The **Data Waiting to be Exported** panel displays details of the data waiting in the Export queue to be downloaded by schools:

Data waiting to be exported			
Base Name	All Employees	Number of Employees	Date / Time of Change
Green Abbey School	T	53	29/04/2019 14:41:00

The panel displays the following:

- **Base Name**
- **All Employees** (True) or change data (False).
- **Number of Employees** - displays the number of employees whose data is held in the message to be exported.
- **Date/Time of Change** - records the original date and time of change for the data in this Export queue.

**NOTE:** Users will not be able to run the **All Employee** export process if there are employees held in **Suspense** and/or **B2B People Match** for the selected base. Users are prompted to clear all outstanding records held in these areas before continuing.



## Import All Employee Data

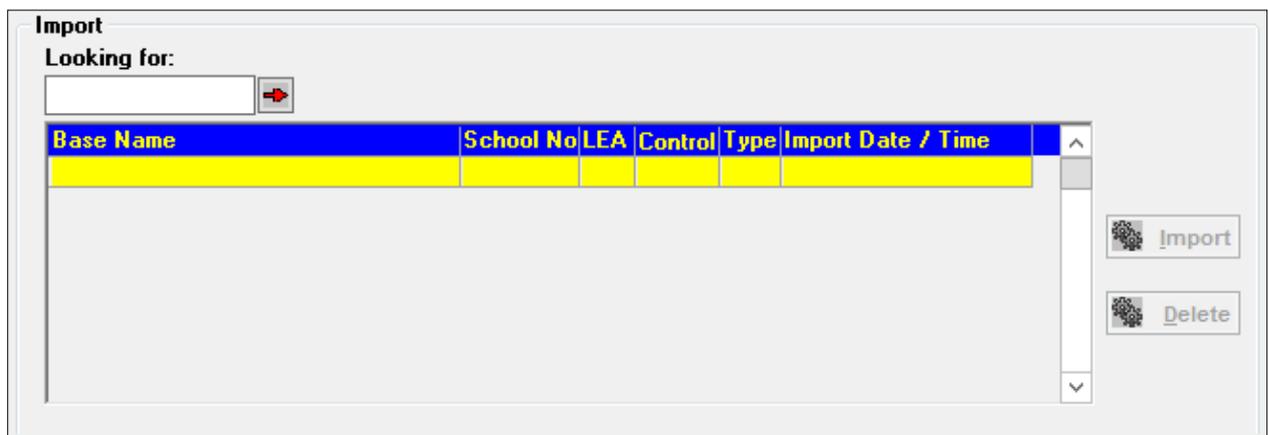
### V3 client | Personnel | Module Administration | B2B Import/Export

This tab allows the One user to import all employee data held in the SIMS.net system to the One system.

Users can only import employee data for a base that has been activated to run B2B:Personnel. (Base activation is done in the **Bases** module. For more information, see [Licences and Permissions](#) on page 6.

**IMPORTANT NOTE:** It is anticipated that this process will only be used once or twice a year. For example, it may be that the Local Authority wishes its schools to send all employee records at the start of each academic year.

**NOTE:** Employees refers to those people in the One/SIMS.net databases that have a current service, a future service or a service that has closed within the last 12 months attached to their record.



## Importing Employee Data

Base Name	School No	LEA	Control	Type	Import Date / Time
Green Abbey School	4321	820	SEC		29/04/2019 14:41:00

The **Import** section of the tab shows summary details of the base(s) which have data waiting to be imported. Base details include the **Base Name**, **School No**, **LEA No**, **Control**, **Type** and **Import Date/Time**.

**NOTE:** The *Import Date/Time* is the date the XML message was imported by the Local Authority.

Use the **Looking For** box to locate a base in the browse by entering the first few characters of the base's name and clicking the red arrow. The box highlights the first or nearest instance of the characters entered.

The **Import** section shows employee details for all employees. The XML message from the school indicates all employees and when imported, the incoming data is processed based on Field Processing rules. If the Field Processing rule for employees is defined as **Always Import** the data items will not go into suspense.

Data with any **Delete** message type(s) automatically goes into suspense processing.

To process incoming employee data:

1. Log into v3 client and select the **Personnel** icon.
2. Go to **Tools | Module Administration | B2B Import/Export**
3. Click the **Import** button in the **Import** panel to accept the incoming employee details.

Further processing is required if conflicts arise, based on whether the incoming and existing data is in conflict, and what Field Processing rules are currently in effect.

4. Alternatively, click the **Delete** button to delete the employee data contained within the incoming XML message.

**NOTE:** It may be that an employee has a Service record with more than one base. In this case, if **All Bases** is selected then the employee details are available to those bases with which a Service is held. If an individual base was selected the B2B process will only allow the employee details to be received for that base.

## B2B People Match

V3 client | Personnel | Tools | Module Administration | B2B People Match

**Note:** When importing employee data from SIMS.net the One system will match Core Identifiers (**Legal Surname**, **Legal Forename**, **Date of Birth**, **Gender** and **NI Number** (if present)). If an exact match is not found, i.e. all incoming Core Identifiers are not the same as those held in One, then the employee record is placed in **B2B People Match** ready for processing.

The screenshot shows a software interface for matching employees. At the top, there is a search bar labeled "Select a Base" with a magnifying glass icon. Below it is a "Looking for:" section with a text input field and a red arrow icon. A table displays search results with the following columns: Legal Surname, Legal Forename, Gender, Date of Birth, and NI Number. The table is currently empty. Below the table is a section titled "Incoming Message Details" with a large empty text area. To the right of this area are two buttons: "View Details" and "View Report". At the bottom of the interface are four buttons: "Match Employee", "Add Employee", "Reject Employee", and "Discard Employee".

The **B2B People Match** tab displays incoming employees from schools where a match was unable to be made to a record in One, based on auto matching rules. From here these employees can either be manually matched or added as new employees.

If functionality is not available on this tab it may indicate that a current **B2B:Personnel** licence is not held by the Local Authority or that the user does not have access to the People Match function.

To match employee records:

1. Log into v3 client and select the **Personnel** icon.
2. Go to **Tools | Module Administration | B2B People Match**
3. Click the magnifying glass under **Select a Base**.

This will display a popup list of all the bases that have unmatched employee data.

The screenshot shows a "Select a Base" popup window. It has a search bar at the top with a magnifying glass icon. Below it is a "Looking for:" section with a text input field and a red arrow icon. A table displays search results with the following columns: Base Name, School No., and LEA No. The table contains one row: Green Abbey School, 4321, 820. Below the table are three buttons: "Select" (with a checkmark icon), "Cancel" (with a red X icon), and "Help" (with a question mark icon).

4. Highlight a base name and click **Select**.

This lookup only lists the Local Authority schools which are licensed for B2B:Personnel and which have incoming employee records waiting to be matched or added.

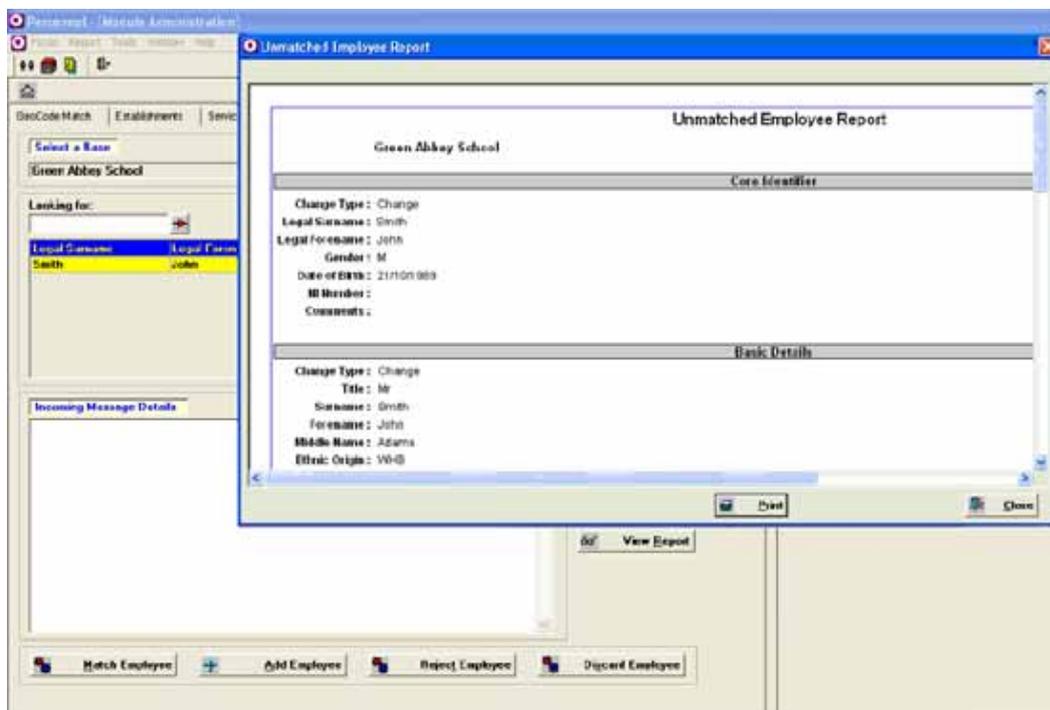
This will list all imported employee records for the base, showing the **Legal Surname, Legal Forename, Gender, Date of Birth** and **NI Number**.

5. Select the employee to process by highlighting the required name.

**Incoming Message Details** for the highlighted employee can be viewed by clicking the **View Details** button. These details are displayed in the adjacent text box in XML format.



The **View Report** button allows users to view and print the **Incoming Details** in a user friendly report format. This option opens the **Unmatched Employee Report** dialog. Clicking the **Print** button sends the contents of the report to the local printer or allows the report to be saved to disk.



6. Process each of the incoming records individually by **rejecting, discarding, adding** or **matching** the employee.

**a. Reject Employee**

Clicking the **Reject Employee** button returns the unmatched employee data to the school. A default message reading "Employee unknown to One system" is created. This message is displayed in a pop-up and may be edited. Clicking the **Reject Employee** button prevents the data from updating the One database.

**b. Discard Employee**

Clicking the **Discard Employee** button clears all incoming data for the unmatched employee from the inbound tables and from the B2B People Match browse. An entry is made in the Import Error Log identifying the data that was discarded and the date and time that it was discarded.

**c. Add Employee**

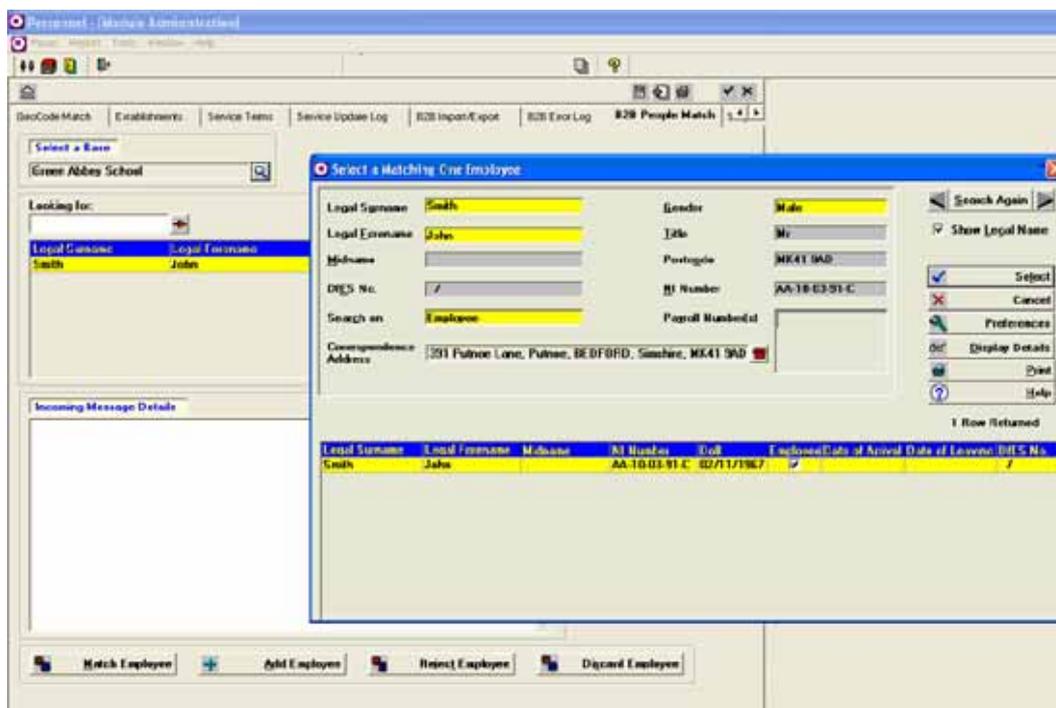
Clicking the **Add Employee** button will create a new employee record in the One database with its associated service record and other incoming data.

**NOTE:** If there is an incoming employee with invalid lookups, e.g. **Allowance Type** or **Scale Code**, and the **Add Employee** button is clicked, users will not be able to add this employee. Therefore, the user should reject this data. If, for example, an incoming employee does not have a Service record this will fail validation and will need to be rejected.

**IMPORTANT NOTE:** Invalid lookups are those lookups that have been imported but do not exist in the One database. Therefore all lookups between SIMS.net and One need to be synchronised for B2B Personnel processing. See the [Synchronisation of Lookups](#) help topic on page 16 for more information.

If all conflicts are resolved by adding the new employee record, the **Suspense** button on the **Person Basic Details** tab in the Personnel Module is greyed out.

**d. Match Employee**



Clicking the **Match Employee** button will open the **Select a Matching One Employee** search dialog. This dialog allows you to enter search criteria in order to match the unmatched employee from the selected school to an existing One Employee/People record.

The search dialog is pre-populated with the Core Identifiers of the incoming employee and the **Search On** option will default to **Employee**. If clicking the **Search** button does not return appropriate records, change the **Search On** option to **All People** (by clicking the **Preferences** button) in order to search on all People records in the One database. The Search dialog will display all People in the One database who have a minimum of two Core Identifiers that match the incoming Employee Core Identifiers. However, users can modify the search criteria if insufficient or inappropriate records are received.

From the list of records returned, select the correct match.

When a match is made and the Field Processing rules are set to **Always Import**, the incoming school data will update the One Employee record and overwrite any existing data in the One database.

When a match is made and there is conflict between the incoming school data and the One data and the Field Processing rules are set to **Always Put In Suspense**, the incoming data is placed in suspense for users to manually process. See the [Suspense Processing](#) help topic on page 29 for more information.

**NOTE:** If an incoming employee is matched to a One employee and the Field Processing rules are set to **Always Import** but the incoming **Employee Address** does not exist in the One database then the incoming school data will update the One Employee record but the **Employee Address** data will be placed in suspense for processing. This also applies to service, scales and allowances.

## Setting the Employee Flag

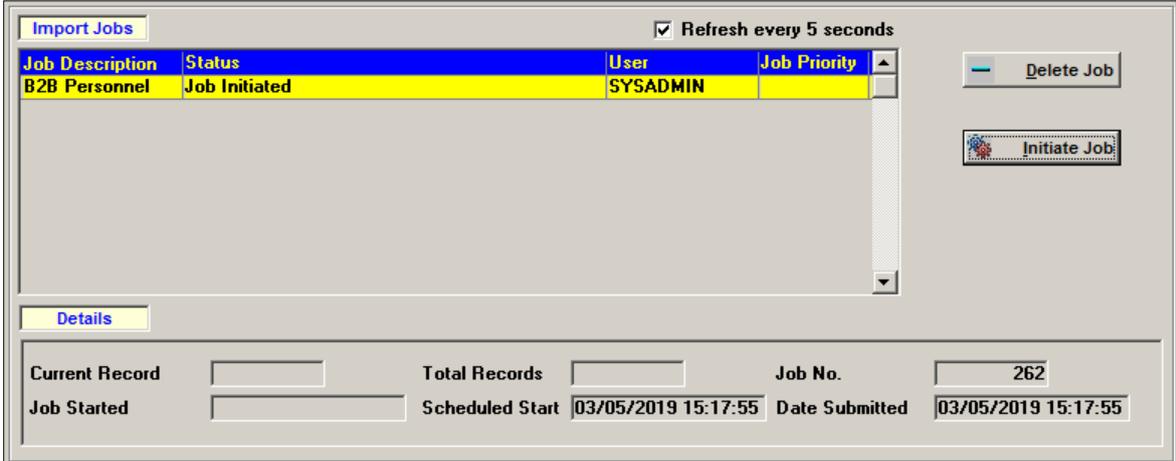
The following needs to be implemented when importing data via B2B:Personnel:

- When the **Add Employee** button is selected and the incoming Unmatched employee has a service record with a **Service End Date** of either null or after today's date and Service FTE (Full Time Equivalent) is > 0 then by default the flag in **Employee** field is set to 'T'.
- When the **Match Employee** button is selected and the incoming employee is matched to a person in One, the 'T' value in **Employee** field will be retained if the incoming person has the **Employee** checkbox selected.

However, if the incoming employee has a service record (Contract data group) with a Service End Date that is null or after today's date and Service FTE (Full Time Equivalent) is > 0 then the flag in the **Employee** field is set to 'T' by default.

## Job Progress

V3 client | Personnel | Tools | Module Administration | Job Progress



Job Description	Status	User	Job Priority
B2B Personnel	Job Initiated	SYSADMIN	

Refresh every 5 seconds

**Details**

Current Record	<input type="text"/>	Total Records	<input type="text"/>	Job No.	262
Job Started	<input type="text"/>	Scheduled Start	03/05/2019 15:17:55	Date Submitted	03/05/2019 15:17:55

The Job Progress tab allows you to monitor the status of B2B:Personnel transfers. Any computer may monitor the job progress of transfers at any time. However, individual users may only view their own imports. System Managers may view all imports.

With the **Refresh Every 5 Seconds** box checked, the **Import Jobs** browse will constantly update the progress of all jobs and monitor the detection of new jobs. The browse shows **Job Description, Status, User** and **Job Priority**.

Details of Transfers are displayed at the foot of the browse and show:

- **Current Record:** The number of the record currently being imported.
- **Total Records:** The number of records included in the Import Job.
- **Job No.:** The ID of the highlighted Import Job.
- **Job Started:** The date and time when the Import Job actually starts.
- **Scheduled Start:** The FTP Start Date and Time
- **Date Submitted:** Usually the same as the Schedule Start.

**Caution:** Clicking the **Delete Job** button deletes the highlighted row and stops the process.

### Job Progress Status

The Job Progress has various stages:

- **Waiting.** The XML message has been found and is waiting to be imported. The One Job processes one message at a time so another message is probably running when this status is displayed.
- **Job Initiated.** Displayed between the time that the job is recognised as existing to the time that One 'picks up' the job.
- **Counting Records.** Counts the number of records in the XML Import message.
- **Uploading Records.** The data is being transferred from the server to the One database.
- **Processing Employees.** The data is being processed according to Field Processing rules.
- **Finished.** The XML message has been imported. At this point, the job is removed from the list and a new import started. If there are no more XML messages to be imported the One Job will close itself down.
- **Error.** The process could not start. Please consult the Import Errors tab to view the message.

# 05 | Suspense Processing

**NOTE:** When importing employee data from SIMS.net the One system matches on the Core Identifiers (**Legal Surname, Legal Forename, Date of Birth, Gender and NI Number** (if present)). If an exact match is found, (i.e. all incoming Core Identifiers are the same as those held in a particular One employee record), then the conflicts in the employee record are placed in suspense ready for processing. This applies to both automatic and manual matches.

## B2B:Personnel XML Messages

Each XML message has a change status type associated with it. The message status is displayed in the **Suspense Processing** window. Examples of change status messages that are imported/exported by B2B:Personnel are given below.

The **Change Status** field is displayed on all tabs. It will indicate the status of incoming data for that group. Incoming data can always be accepted if it is appropriate and valid. Accepting data will add to or overwrite the One data with the incoming data. If, for example, the incoming data is an inactive One code, that code must be reactivated by One in order to accept the data. If the incoming data is a code that does not exist in One, then the incoming data can be accepted by creating a new code that is the same as the incoming code.

Each of the below statuses is described from a One aspect when data is held in suspense.

- **No Change**

This status is only seen on the **Core Details** tab as this tab is the only one which is enabled with no change. The core details are identifiers and always included in XML messages regardless of whether there is a change. All other tabs are only available where there are other data items in suspense. This status will indicate that there are no changes identified for this data group.

- **Change**

The **Change** status indicates to the One user that a change to the One data has been sent by the school. A change item may be accepted or rejected.

- **Delete**

The **Delete** status indicates that the school has sent deleted values for all data items in a data group which will delete the existing One data if accepted, e.g. an address which is no longer applicable. If all data items in a data group have not been deleted, a **Change Status** message is sent instead.

A Delete item can be accepted or rejected.

- **Rejected Change**

The **Rejected Change** status is displayed if a data change is rejected by the receiving school. In this case the school will send its currently held values to One. This data group can be accepted or rejected by One.

- **Rejected Delete**

The **Rejected Delete** status is displayed if One deleted data is returned from the receiving school as rejected, along with the current values held by the school. These items can be accepted or rejected.

- **Rejected Rejected Change**

The **Rejected Rejected Change** status is used when a school returns a previously-rejected change. In this message the school will send its currently held values to One. An item with this status cannot be rejected again by One as the **Reject** button is disabled.

### ■ Rejected Rejected Delete

The **Rejected Rejected Delete** status is used when a school returns a previously-rejected change. In this message the school will send its currently held values to One. An item with this status cannot be rejected again by One as the **Reject** button is disabled.

**IMPORTANT NOTE:** Users should resolve **Rejected Rejected Change** or **Rejected Rejected Delete** message conflicts by alternative means, as they cannot be rejected a second time. For example, users might talk to the school to resolve the issue so that this can be re-sent, overwriting and clearing the data in suspense.

The XML message is only a **Delete** if all the data items in the data group are blank. This indicates that the data items have been deleted at source. If a message type of **Delete**, **Rejected Delete** or **Rejected Rejected Delete** is accepted then the existing data is overwritten with blank values.

If at least one data item is present in a data group, the message type is sent as a **Change**.

# 06 | Suspense

## Processing Suspense Records

V3 client | Personnel | Tools | Module Administration | Suspense

This tab displays messages received from the Local Authority schools for which data is held in suspense.

Base Name	Legal Surname	Legal Forename	Gender	Date of Birth	NI Number
Green Abbey School	Batchley		F		

Bases with employee data held in suspense are listed on the left. When a base is highlighted, the employees with data in conflict are displayed in the right panel. This panel lists employee records in alphabetical order showing the incoming employee core details: **Legal Surname**, **Legal Forename**, **Gender**, **Date of Birth** and **NI Number**.

The **Looking For** facility allows you to locate a record by entering the first few characters of the Legal Surname and clicking the red arrow. This will highlight the first or nearest instance of those characters.

Highlighting a record and clicking the **Suspense** button will open the **Suspense Processing** tab set, allowing users to accept or reject the incoming school data.

**NOTE:** Employee records are removed from the suspense browse when related conflicting items have been resolved by either accepting or rejecting the incoming data.

The **Suspense Processing** tab set can also be accessed from an employee's **Person Basic Details** page. The **Suspense** button is only enabled where data for the selected employee is held in suspense.

## Employee Suspense Processing

Core Details	Basic Details	Payee Details	Service	Roles	Suspension	Employment Details
Name History		Address	Telephone Details	Qualifications	Absences	

Suspense processing allows users to manually resolve any conflicts of personnel employee data for those employees for whom a match has been found (either automatically or manually) and conflicts are found between the incoming SIMS.net value and the current One data. It allows users to review the incoming data against that currently held in One and to choose which data to keep or reject. Where incoming data is accepted, the incoming value will update the One database. Where incoming data is rejected, the One value is returned to the school.

When data is held in suspense for an employee, all employee related data which is held in suspense is locked and not available for editing until it is resolved.

## Suspense

The **Employee Suspense Processing** dialog has a series of tabs for each data group which will display all the data items contained in that group. See below for more information on each tab.

To process suspense records:

1. Log into v3 client and select the **Personnel** icon.
2. Go to **Tools | Module Administration | Suspense**
3. Highlight a base in the left panel to display employee details.
4. Highlight an employee and click the **Suspense** button.
5. Select each tab to process the records in suspense.

Only tabs with data in suspense will be enabled. All other tabs will be greyed out.

When all suspense is cleared the employee is cleared from the inbound tables and from the **Suspense** browse.

6. Select the next employee to continue processing suspense.

When all employees for a base have been processed, the base is cleared from the inbound tables and from the **Suspense** browse.

7. Select the next base to continue processing suspense.

**IMPORTANT NOTE:** Each tab displays the **Current One Value** and the **Incoming School Value**. The **Change Status** field displays the message type that is sent (these can be **No Change, Change, Rejected Change, Rejected Rejected Change, Delete, Rejected Delete** and **Rejected Rejected Delete**. See the [XML Message Status Types](#) help topic on page 4 for more information). The school data fields are headed with the name of the school from which the data was sent. The **Accept, Reject** and **Discard** buttons allow you to process the incoming data appropriately.

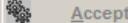
The **Discard** button is always enabled when there is data held in suspense. When the **Discard** button is clicked all incoming data for the highlighted employee is cleared from the inbound tables and from the **Suspense** browse. An entry is made in the **Import Error Log** identifying the data that was discarded and the date and time that it was discarded.

When a change is made in One, the change data is transferred into an outbound queue in order to be exported to the SIMS school system. The outbound queue also holds rejected XML messages for return to the appropriate school. Data is held in this outbound queue until the school sends a request to the web server to download messages.

**NOTE:** When an employee belongs to multiple bases and data is received for this employee from one base these changes must update the other bases that this employee belongs to, with the exception of service, scales and allowances. However, some of these Bases may not be licensed for B2B:Personnel. In these circumstances, a One Information message is displayed and XML messages will not be generated for these Bases.

## Employee Core Details

**NOTE:** The Core Identifiers tab is always enabled, regardless of whether there is data in conflict or not. This is because the Core Identifiers are used for matching an employee.

Change Status	<input type="text" value="No Change"/>		
	<b>Current EMS Value</b>	<b>Green Abbey School Value</b>	
Legal Surname	<input type="text" value="Batchley"/>	<input type="text" value="Batchley"/>	
Legal Forename	<input type="text"/>	<input type="text"/>	
Gender	<input type="text" value="Female"/>	<input type="text" value="Female"/>	
Date of Birth	<input type="text"/>	<input type="text"/>	
NI Number	<input type="text"/>	<input type="text"/>	
		Comments	
		<input type="text"/>	

The tab displays the **Current One Value** and the **Incoming School Value**. The **School** data fields show the name of the school from which the data was sent.

Core data items accompany all incoming messages regardless of the change status. This is the only tab that is enabled at all times, even if there is no change.

Core Data comprises **Legal Surname, Legal Forename, Gender, Date of Birth** and **NI Number**.

An asterisk (\*) indicates the incoming school values that are in conflict with the One values.

The **Comments** field displays any remarks present in the incoming school XML message. For the initial incoming data change a comment is optional.

Core Details can be processed as follows:

- Click the **Accept** button to update the One database with the incoming school values.

Any incoming values which are not valid One values will not be accepted. For the incoming data to be accepted, the relevant value in One must be changed, otherwise the data item must be **Discarded** or **Rejected**.

If there is data that does not match the Business Rules (e.g. a date is in an invalid format), a rejection message is displayed. It is not possible to accept this data.

**NOTE:** In the case of invalid lookups users can keep the data in suspense without processing and add the lookup into One Personnel User Codes. Users can then return to suspense to accept the data. The data should have been synchronised using the SIMS Lookup Builder.

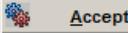
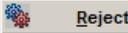
- Click the **Reject** button to reject the incoming values.

This displays a popup Comment window, into which details can be entered explaining why the data has been rejected. This information is then added to a database table, and will be returned to the school when the school requests to download messages from One.

- Click the **Discard** button.

When the **Discard** button is clicked all incoming data for the highlighted employee is cleared from the inbound tables and the **Suspense** browse. An entry is made in the **Import Error Log** identifying the data that was discarded and the date and time that it was discarded.

## Employee Basic Details

Change Status	Change		
	Current EMS Value	Green Abbey School Value	
Surname	Darby	Darby	
Forename			
Middle Name			
Title			
Ethnic Origin	WBRI British (101)	WBRI British (101)	
Impairment Status			
		Comments	

If there are no employee details held in suspense this tab is disabled.

The tab displays the **Current One Value** and the **Incoming School Value**. The **School** data fields show the name of the school from which the data was sent.

The **Change Status** field indicate the status category of the incoming XML message. For example, if there is a change in the data, the **Change Status** field will display "Change".

Employee Basic Details comprise **Chosen Surname**, **Chosen Forename**, **Middle Name**, **Title** and **Ethnic Origin**.

An asterisk (\*) indicates which incoming school values are in conflict with the One values.

The **Comments** field displays any remarks present in the incoming school XML message. For the initial incoming data change a comment is optional.

Basic Details can be processed as follows:

- Click the **Accept** button to update the One database with the incoming school values.

Any incoming values which are not valid One values will not be accepted. For the incoming data to be accepted, the relevant value in One must be changed, otherwise the data item must be **Discarded** or **Rejected**.

If there is data that does not match the Business Rules (e.g. a date is in an invalid format), a rejection message is displayed. It is not possible to accept this data.

**NOTE:** In the case of invalid lookups users can keep the data in suspense without processing and add the lookup into One Personnel User Codes. Users can then return to suspense to accept the data. The data should have been synchronised using the SIMS Lookup Builder.

- Click the **Reject** button to reject the incoming values.

This displays a popup Comment window, into which details can be entered explaining why the data has been rejected. This information is then added to a database table, and will be returned to the school when the school requests to download messages from One.

Where data is rejected because it does not match the Business Rules (e.g. a date comes in an invalid format), a rejection message is displayed giving an explanation of the rejection.

- Click the **Discard** button.

When the **Discard** button is clicked all incoming data for the highlighted employee is cleared from the inbound tables and the **Suspense** browse. An entry is made in the **Import Error Log** identifying the data that was discarded and the date and time that it was discarded.

## Payee Details

Change Status	Change		<input type="button" value="Accept"/> <input type="button" value="Reject"/> <input type="button" value="Discard"/>
Account No	Current EMS Value	Green Abbey School Value	
Sort Code		801	
		20-74- *	
		Comments	

This tab is disabled if payee data is not held in suspense.

Payee details are comprised of the employee's **Account No** and **Sort Code**.

The tab displays the **Current One Value** and the **Incoming School Value**. The **School** data fields show the name of the school from which the data was sent.

The **Change Status** field indicate the status category of the incoming XML message. For example, if there is a change in the data, the **Change Status** field will display "Change".

An asterisk (\*) indicates which incoming school values are in conflict with the One values.

The **Comments** field displays any remarks present in the incoming school XML message. For the initial incoming data change a comment is optional.

Basic Details can be processed as follows:

- Click the **Accept** button to update the One database with the incoming school values.

Any incoming values which are not valid One values will not be accepted. For the incoming data to be accepted, the relevant value in One must be changed, otherwise the data item must be **Discarded** or **Rejected**.

If there is data that does not match the Business Rules (e.g. a date is in an invalid format), a rejection message is displayed. It is not possible to accept this data.

**NOTE:** In the case of invalid lookups users can keep the data in suspense without processing and add the lookup into One Personnel User Codes. Users can then return to suspense to accept the data. The data should have been synchronised using the SIMS Lookup Builder.

- Click the **Reject** button to reject the incoming values.

This displays a popup Comment window, into which details can be entered explaining why the data has been rejected. This information is then added to a database table, and will be returned to the school when the school requests to download messages from One.

Where data is rejected because it does not match the Business Rules (e.g. a date comes in an invalid format), a rejection message is displayed giving an explanation of the rejection.

- Click the **Discard** button.

When the **Discard** button is clicked all incoming data for the highlighted employee is cleared from the inbound tables and the **Suspense** browse. An entry is made in the **Import Error Log** identifying the data that was discarded and the date and time that it was discarded.

## Service

Service

Incoming School Values

Base Name	Term	Post	Start	End	Type	Hrs/wk	Payroll	End Rsn	Wks/yr	Superan	Post Reason	Origin
Green Abbey School	MW	MID	03/05/2019		P	5			38			OTHEDU

Comments

EMS Values

Base Name	Term	Post	Start	End	Type	Hrs/wk	Payroll	End Rsn	Wks/yr	Superan	Post Reason	Origin

Discard

Scales

Incoming School Values

Start	End	Code	Point	Salary Amount	Comments	Matched
03/05/2019		GR 1	1			Unmatched

Current EMS Values

Start	End	Code	Point

Allowances

Incoming School Values

Start	End	Code	Type	Pay Factor	Amount	Comments	Matched	Change

Current EMS Values

Start	End	Code	Type	Pay Factor	Amount

This tab is disabled if service data is not held in suspense.

The **Service** tab shows all service records in One for the employee for whom data is held in suspense. Highlight a service record and click the **Service** button to view details of the selected service.

Red highlights in a field indicate the incoming school values that are in conflict with the One values.

This tab displays three data groups:

- Service
- Scales
- Allowances

Each data group has its own panel, showing **Incoming School Values** and **Current One Values**. The **Incoming School Values** will indicate whether the record is matched or unmatched.

**IMPORTANT NOTE:** When an employee belongs to multiple Bases and data is received for this employee from one Base these changes must update the other Bases that this employee belongs to, with the exception of services, scales and allowances. However, some of these Bases may not be licensed for B2B:Personnel. In these circumstances a message is displayed and XML messages are not generated for these Bases.

**NOTE:** It is recommended that service data groups are processed first, then scales groups, and finally allowance groups.

The values for both incoming and One service records will show the **Base Name, Term, Post, Start and End Dates, Type, Hrs/Wk Payroll, End Rsn (Reason), Superan, Post Reason, Origin and Destination**. The incoming school values will include **Matched** and **Change Status** indicators. The **Change Status** column indicates the status category of the incoming XML message. For example, if there is a change in the data, the **Change Status** field will display "Change".

If applicable, the **Comments** field displays details of why data has been rejected. The **Comments** field may also show any change information that has been added by a school.

Where invalid data is rejected (either manually or automatically) because it failed the Business Rules (e.g. an invalid service Type lookup) then a rejection message giving an explanation of the rejection is displayed.

Service records can be processed as follows:

- Click the **Accept** button to update the One database with the incoming school values.

Any incoming values which are not valid One values will not be accepted. For the incoming data to be accepted, the relevant value in One must be changed, otherwise the data item must be **Discarded** or **Rejected**.

- Click the **Reject** button to reject the incoming values.

This displays a popup Comment window, into which details can be entered explaining why the data has been rejected. This information is then added to a database table, and will be returned to the school when the school requests to download messages from One.

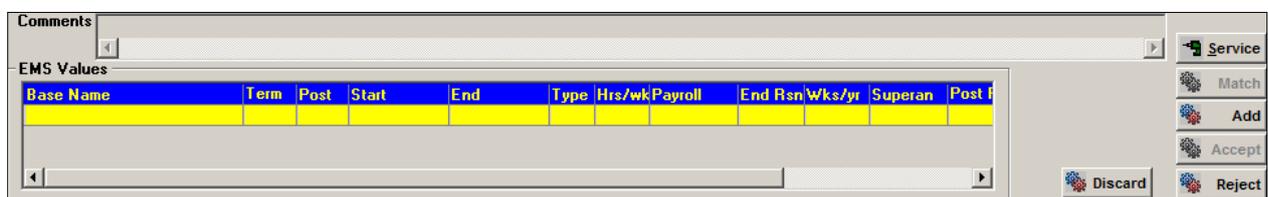
- Click the **Discard** button.

When the **Discard** button is clicked all incoming data for the highlighted employee is cleared from the inbound tables and the **Suspense** browse. An entry is made in the **Import Error Log** identifying the data that was discarded and the date and time that it was discarded.

- Click the **Match** or **Add** buttons. The function of these buttons is described below.
- Click the **Service** button to view details of the employee's service records in One.

### Unmatched Service, Scales and Allowances (where there are no matching services, scales and allowances in One)

In this scenario, there are no existing services, scales or allowances in the One database to match the incoming SIMS.net data. The **Add, Reject** and **Discard** buttons are enabled, the **Match** button is disabled.



To add the service record:

Click the **Add** button to add the highlighted incoming service record, including scales and allowances, to the One database.

## Suspense

The incoming data will be cleared from all service related areas in suspense. Any Roles data held for the unmatched service is added and the **Roles Suspense** tab is disabled. See the [Roles](#) help topic on page 46 for more information.

### Unmatched Service, Scales and Allowances (where there are potentially matching services, scales and allowances)

In this scenario, there are existing services in the One database to match the incoming SIMS.net data.

Where there are one or more potential matches available, the **Match**, **Add**, **Reject** and **Discard** buttons are enabled. The incoming service record must be matched to a One record before the data can be accepted or rejected.

To add the service record:

Click the **Add** button to add the highlighted incoming service record, including scales and allowances, to the One database.

To match the service record:

Highlight the relevant record in the **One Values** panel and click the **Match** button.

After matching the incoming record to a One record, any conflicts are highlighted in **red** and the status in the **Matched** column changes from Unmatched to Matched.

#### ■ Matched Service Record

The **Accept**, **Reject** and **Discard** buttons are enabled.

Clicking the **Accept** button will overwrite the One values with the incoming school values.

Once the service data is accepted the **Match**, **Add** and **Discard** buttons are enabled in the Scales and Allowances panels.

#### ■ Unmatched Scales Record

The screenshot shows a window titled "Scales" with two tables and a set of buttons. The "Incoming School Values" table has columns: Start, End, Code, Point, Comments, Matched, and Change Status. The "Current EMS Values" table has columns: Start, End, Code, and Point. The "Matched" column in the first table shows "Unmatched" and the "Point" column in the second table shows "2". To the right of the tables are buttons for Match, Add, Accept, Reject, and Discard.

Incoming School Values						
Start	End	Code	Point	Comments	Matched	Change Status
01/01/2008		TMS	1		Unmatched	Change

Current EMS Values			
Start	End	Code	Point
01/01/2008		TMS	2

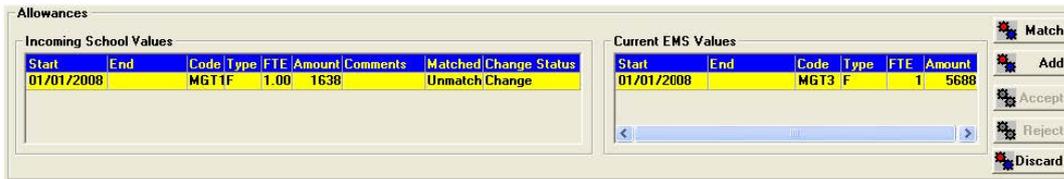
Where there are no existing scales in the One database to match the incoming SIMS.net data, clicking the **Add** button adds the incoming scales record to One and clears the scales data from suspense.

Where there are existing scales in the One database to match the incoming SIMS.net data, the potential matches are displayed in the **Current One Values** box.

Click the **Match** button to match the incoming scales data to the One record by Scale ID. If the incoming and current data differs the conflict is highlighted in **red** and the **Accept**, **Reject** and **Discard** buttons are enabled.

Click the **Accept** button to accept the incoming value. This will overwrite the One values with the incoming school scales values

■ Unmatched Allowances Record



Where there are no existing allowances in the One database to match the incoming SIMS.net data, clicking the **Add** button adds the incoming allowances record to One and clears the allowances data from suspense.

Where there are existing allowances in the One database to match the incoming SIMS.net data, the potential matches are displayed in the **Current One Values** box.

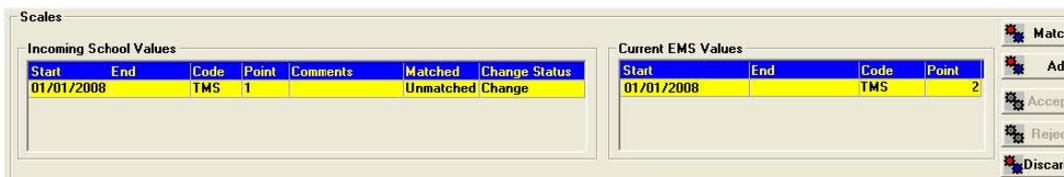
Click the **Match** button to match the incoming allowances data to the One record by Allowance ID. If there are multiple One allowances records, select the appropriate record and then click the **Match** button. If the incoming and current data differs the conflict is highlighted in **red** and the **Accept**, **Reject** and **Discard** buttons are enabled.

Click the **Accept** button to accept the incoming value. This will overwrite the One values with the incoming school allowances values

**Auto-Matched Service Record with unmatched scales and allowances**

In this scenario the service record has been auto-matched (the status in the **Matched** column is Matched) but the incoming scales and allowances are in conflict. The **Match**, **Add** and **Discard** buttons are enabled in the Scales and Allowances panels.

■ Unmatched Scales Record



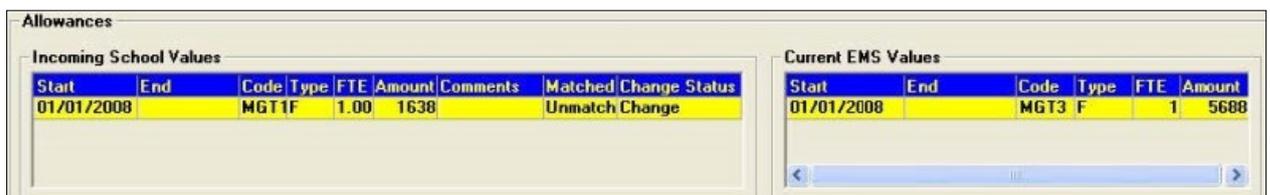
Where there are no existing scales in the One database to match the incoming SIMS.net data, clicking the **Add** button adds the incoming scales record to One and clears the scales data from suspense.

Where there are existing scales in the One database to match the incoming SIMS.net data, the potential matches are displayed in the **Current One Values** box.

Click the **Match** button to match the incoming scales data to the One record by Scale ID. If the incoming and current data differs the conflict is highlighted in **red** and the **Accept**, **Reject** and **Discard** buttons are enabled.

Click the **Accept** button to accept the incoming value. This will overwrite the One values with the incoming school scales values

■ Unmatched Allowances Record



Where there are no existing allowances in the One database to match the incoming SIMS.net data, clicking the **Add** button adds the incoming allowances record to One and clears the allowances data from suspense.

## Suspense

Where there are existing allowances in the One database to match the incoming SIMS.net data, the potential matches are displayed in the **Current One Values** box.

Click the **Match** button to match the incoming allowances data to the One record by Allowance ID. If there are multiple One allowances records, select the appropriate record and then click the **Match** button. If the incoming and current data differs the conflict is highlighted in **red** and the **Accept**, **Reject** and **Discard** buttons are enabled.

Click the **Accept** button to accept the incoming value. This will overwrite the One values with the incoming school allowances values

## Auto-Matched Service, Scales and Allowances With Conflicts

This scenario shows an auto-matched incoming service, scales and allowances record with conflicts in all areas. These conflicts are highlighted in **red**.

Incoming School Values							Current EMS Values			
Start	End	Code	Point	Comments	Matched	Change Status	Start	End	Code	Point
01/01/2008		TMS	1		Unmatched	Change	01/01/2008		TMS	2

The only options available in this scenario are to **Accept**, **Reject** or **Discard** the incoming data.

Click the **Accept** button to accept the incoming value(s). This will overwrite the One values with the incoming school values.

When service, scales and allowances data have been processed the service is removed from suspense.

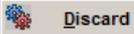
## Suspension

This tab allows the Local Authority user to process and create Suspension records by establishing links between services held in One.

Linked Service							
Base Name	Term	Post	Start	End	Type	Hrs/wk	Payroll
Green Abbey School	TE	TCHR	01/09/2013		P	32.5	PR161

Incoming School Values		
Start Date	End Date	Reason
02/05/2019	03/05/2019	Swearing



EMS Service Record									
Base Name	Term	Post	Start	End	Type	Hrs/wk	Payroll	Superannuation	
Green Abbey School	TE	TCHR	01/09/2013		P	32.5	PR161160	TEAC	



The **Suspensions** tab is only enabled if the following three conditions are true:

- The school has sent Suspensions data for an employee.
- The **Linked Services** data group is matched.
- The **Field Processing** rule for the **Suspensions** data group is set to **Always Put In Suspense**.

**NOTE:** The Services data group will always be sent when the Suspensions data group is sent; this is to help identify the service to which the incoming Suspension is linked.

If the incoming Suspension is linked to an incoming unmatched service then the Suspension tab is disabled until the linked incoming services data group has been processed in the **Service** tab.

If the incoming unmatched service is discarded then any incoming Suspensions that are linked to this service data group are also discarded.

If the linked Service data group has no changes in itself it is auto-matched to the corresponding One service record (since both the SIMS.net and One Service IDs have been synchronised). In this case the **Suspension** tab is enabled.

## Processing Incoming Suspensions Data

When the school adds a Suspension record for a service or edits an existing Suspension record for a service, details of the edit are sent in the **Suspensions** data group along with the relevant service data group.

The **Suspension** tab comprises the following three sections:

- Linked Service Panel

Linked Service							
Base Name	Term	Post	Start	End	Type	Hrs/wk	Payroll
Green Abbey School	TE	TCHR	01/09/2013		P	32.5	PR161

This panel displays the details of the incoming services data group that is linked to. It is always sent with the Suspensions data group.

**NOTE:** Use the scroll bar to view further data for the Linked Service.

The **Linked Service** panel may display multiple service records; schools may send Suspension records for different service records which have been added for an employee.

To view the incoming Suspension records for a particular service record, select the Service by highlighting the relevant Service record. Once the Service record is selected One will display all the incoming Suspension records that are linked to the selected Service in the **Incoming School Values** panel.

- Incoming School Values panel

Incoming School Values		
Start Date	End Date	Reason
02/05/2019	03/05/2019	Swearing

This panel will display the following details for the incoming Suspension records:

- **Start Date:** the Start Date of the incoming Suspension record
- **End Date:** the End Date of the incoming Suspension record

## Suspense

- **Reason:** the Reason of the incoming Suspensions record. This is a free text field with a maximum length of 50 characters.

**NOTE:** The **Incoming School Values** panel may display multiple Suspension records if those records are linked to the selected Service displayed in the **Linked Service** panel.

One does not store a free text reason for a Suspension. Instead the SIMS.net Suspension reason is sent by B2B:Personnel from SIMS.net to One and is displayed, for information only, in the **Suspension Suspense** tab when processing the incoming Suspension record. One does not store Suspension Start and End Dates as separate entities since these actually correspond to the **Seconded or Acting/Promoted Service Start and End** dates.

The **Incoming School Values** panel also features a **Discard** button. If you select an incoming Suspension record and then click the **Discard** button the incoming Suspension record is discarded. Unlike some other data groups, there is no option to **Accept** the incoming record – this is because the methods of storing suspensions are so different in the two systems that it is not possible to create a new suspension record solely based on the incoming data.

### ■ One Service Records Panel



Base Name	Term	Post	Start	End	Type	Hrs/wk	Payroll	Superannuation
Green Abbey School	TE	TCHR	01/09/2013		P	32.5	PR161160	TEAC

+ Create Suspension Link

The **One Service Records** panel displays details of the employee services that are active during the dates of the incoming Suspension record.

Since One relies on recognising Suspensions (e.g. for ASR, 618G etc) by means of a direct link between the original Suspended service and the Acting or Seconded service, it is important that the new 'Suspension' tab processing area provides the facility to create such a link. Therefore, the **Create Suspension Link** button is available in the **One Service Records** panel of the Suspension tab.

Where a service record has a Service Type of **A**(Acting) or **S**(Seconded), this service record is expected to be linked to another original service record. Therefore, from the Personnel module perspective a service record with a Service Type of Acting or Seconded should not be held in the database without having a link to another original 'suspended' service record. Although this scenario cannot happen with service records that have originated in the Personnel module, it can happen when importing data via B2B:Personnel in the following ways:

- Where an employee that has a service at one school is seconded or begins an acting service at a different school.
- To resolve this scenario:
  - Add a Suspension record for the employee against their original service at their original school.
  - Add a new service at the different school. This service should have a Service Type of **A**(Acting) or **S**(Seconded).
- When the next scheduled data export is run for each school, B2B:Personnel will transfer the following data from the school's SIMS.net system to the One system at the Local Authority:
  - Any changes to the original service (if these have been made)

- The Suspensions data group. This contains details of the newly added Suspension data (details of the service for which the Suspension record was added will also be sent in the service data group)
- The newly added service with a Service Type of Acting or Seconded. Since this has come from a different school it may be received at a different time.

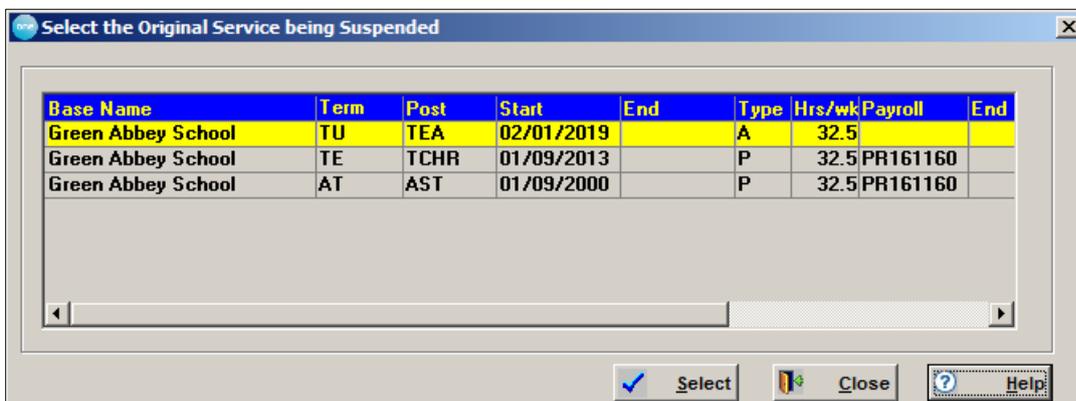
The situation is similar to when an employee who has a service at one school is seconded or begins a new acting service at the same school. However, the suspension of the original service and the newly added acting or seconded service should both be added by the same school.

Either way, when the details are imported the Acting or Seconded service will not be automatically linked with the original service. The **Create Suspension Link** function allows users to establish this link. This facility is available both on the **Service** tab and on the **Suspension** tab.

To create a suspension link:

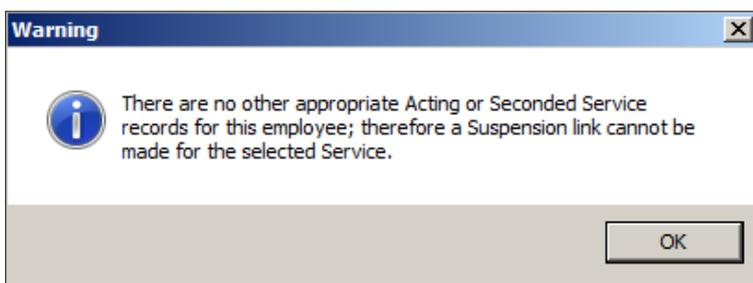
1. Click the **Create Suspension Link** button

This display the **Select The Original Service Being Suspended** dialog. This dialog displays all relevant service records for the employee.



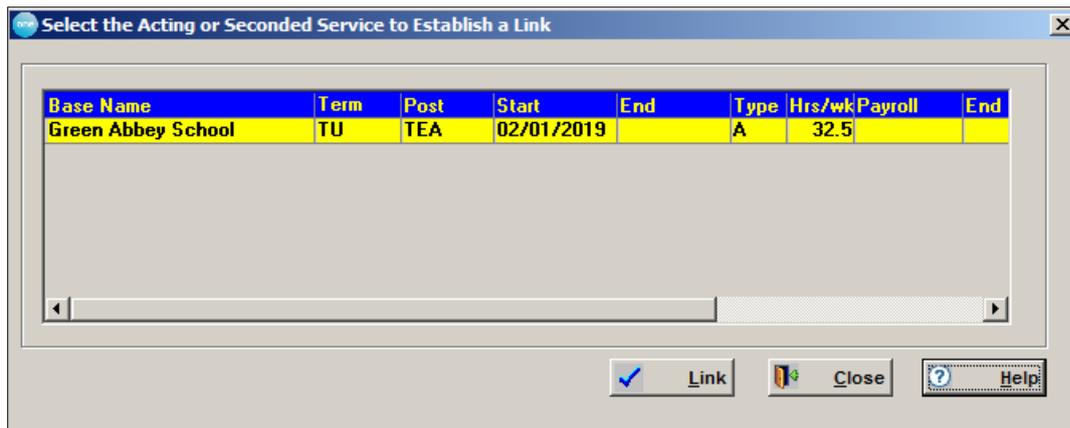
2. Highlight the original service and then click the **Select** button.

If there is no record of Service Type **A** or **S** which is active between the Selected Service dates, the following message displays:



When a service has been selected the **Select the Acting or Seconded Service to Establish a Link** dialog is displayed:

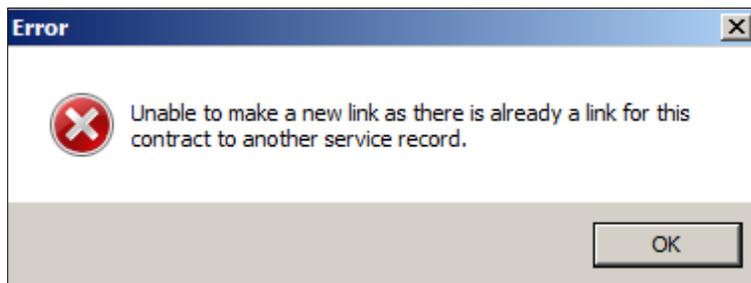
## Suspense



This dialog displays all the service records of type **Acting** or **Seconded** that are linked to the employee and are active during the time the selected service runs.

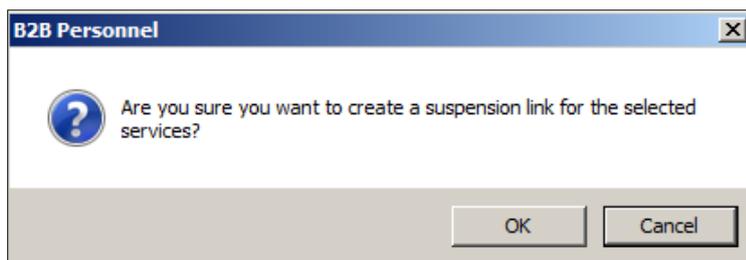
Highlight the appropriate **Acting/Seconded** service and then click the **Link** button to create the link between the two service records. One will then validate the link.

If users try to establish a link for a service record that already has a link to another service record, the following error message is displayed:



In this scenario, select the **Close** button, to go back to the **Select the Original Service being Suspended** pop up window.

If there is no link present between the selected services the following message is displayed:



Select **Yes** to create a direct suspension link between the two services.

**TECHNICAL NOTE:** Creating a direct link creates a new record in the *SUSPENSION* table.

### Guidance Note for Users:

SIMS.net Suspensions data cannot be imported directly. Instead the incoming Suspension data must be viewed and compared to the list of service records held in the database. From there, decide whether to record a new Acting/Seconded Service in light of this information:

- It may be that the incoming Suspension data reflects a disciplinary suspension (rather than a suspension due to the employee temporarily taking up another post). There is currently no specific area to store this type of suspension in One. As such, the Local Authority user processing the incoming record may **Discard** the incoming disciplinary Suspension data.

- If there is no Acting/Seconded Service already recorded in the database for the Suspension period then users may wish to record one at this point. The incoming Suspension data will not give enough information to allow One to automatically create a new service, since the incoming data only informs the Local Authority user of the probable dates of the new service. For example, the incoming Suspension data doesn't inform users of the base, Service Term or post details. They would need to obtain this information outside of One. There is no further need to retain the incoming SIMS.net Suspension data, since it would already have been acted on.

Users would therefore need to click the **Discard** button to remove the SIMS.net Suspension data from the **Suspension** tab. One will not retain any of the Suspension data; the incoming Suspension details will only be used to help to prompt action.

Next, ensure that a corresponding Acting/Seconded service is created in One. To do so, suspend the original service. This must be done outside of the **Suspensions** tab on the **Focus | Employees | Service | Service Details** tab by pressing the **Suspend** button. However, before suspending the service in this way (therefore creating a new acting or seconded service) users should check to see whether the Acting/Seconded service already exists in One - see the scenario below.

- It may be that there is already a service that reflects the Acting/Seconded Service. In this case discard the incoming Suspension data using the **Discard** button. However, users may need to **Create a Suspension Link** before discarding the data if the Acting or Seconded Service originated in SIMS and was imported into the One system. In this scenario the suspension link would not be automatically created, and so a link should be created through the **Create Suspension Link** process.
- It may be that an incoming B2B:Personnel XML message from a school contains the Suspension data, the 'suspended' service and also the new service. This would only be the case if the Acting/Seconded Service is recorded at the same school. It is easy to identify this scenario, since the incoming Service Type for the new service is either **A** or **S**.

The incoming Acting/Seconded Service, as well as any changes to the 'suspended' service, are processed in the same way as existing incoming services. This must be done before viewing the incoming Suspension data, since viewing the data may cause a new service to be added. Once the incoming Suspension has been reviewed and is no longer required by the Local Authority, **Discard** the incoming Suspension data so that it is removed from the **Suspension** tab.

- If a member of staff is seconded to a position at another school there would be two B2B:Personnel XML messages; one from each school. The first school sends the Suspension data and the 'suspended' service. The second school then sends the new service that represents the Acting/Seconded service. The Service Type for this service record ID either A or S.

The incoming 'suspended' service and Acting/Seconded Service would be processed in the same way as existing incoming services. This must be done viewing the incoming Suspension data, since viewing the data may require a Suspension link to be created via the **Create Suspension Link** functionality. Once the incoming Suspension has been reviewed and is no longer required by the Local Authority, **Discard** the incoming Suspension data so that it is removed from the **Suspension Suspense** tab.

## Roles

The **Roles** tab shows all role records related to the employee for whom data is held in suspense. Highlighting a service record in the **Linked Service** panel displays all the roles held in suspense for the selected service.

Base Name	Term	Post	Start	End	Type	Hrs/wk	Payroll	End Rsn	Wks/yr	Superan	Post Reason	Origin	Destin.
Green Abbey School	TE	TCHR	01/09/2013		P	32.5	PR161160		52.143	TEAC		OTHERR	
Green Abbey School	TU	TEA	02/01/2019		A	32.5			52.143			TCHLEA	

Code	Start Date	End Date	Comments	Matched	Change Status
EXAM	02/01/2019			Unmatched	Change

Code	Start Date	End Date

**NOTE:** The **Contracts** data group is sent whenever the **Roles** data group is sent via B2B:Personnel. This allows One to identify which service record the Role is linked to.

The **Linked Service** panel displays the following details of the service to which the incoming Role is linked: **Base Name, Term, Post, Start, End, Type, Hrs/Wk, Payroll, End Rsn** (Reason), **Wks/yr, Superan**(nuation), **Post Reason, Origin, Destination, Matched** and **Change Status** indicators.

The **Incoming Schools Values** displays the incoming **Code, Start Date, End Date, Matched** and **Change Status** details.

The **Change Status** field indicate the status category of the incoming XML message. For example, if there is a change in the data, the **Change Status** field will display "Change".

Roles records can be processed as follows:

- Click the **Accept** button to update the One database with the incoming school values.
- Any incoming values which are not valid One values will not be accepted. For the incoming data to be accepted, the relevant value in One must be changed, otherwise the data item must be **Discarded** or **Rejected**.
- Click the **Reject** button to reject the incoming values.

This displays a popup Comment window, into which details can be entered explaining why the data has been rejected. This information is then added to a database table, and will be returned to the school when the school requests to download messages from One.

- Click the **Discard** button.

When the **Discard** button is clicked all incoming data for the highlighted employee is cleared from the inbound tables and the **Suspense** browse. An entry is made in the **Import Error Log** identifying the data that was discarded and the date and time that it was discarded.

- Click the **Match** or **Add** buttons. The function of these buttons is described below.

Where invalid data is rejected (either manually or automatically) because it failed the Business Rules (e.g. because the data had an invalid Role Code) a message giving an explanation of the rejection is displayed.

### Unmatched service record

If a Service record is sent by a school and there is no matching record in One for this Service, the **Match**, **Add**, **Accept**, **Reject** and **Discard** buttons are disabled for all Roles. It is not possible to process the Roles data until the data in the **Service** tab has been processed (see [Service](#) on page 36 for information on processing service records).

Base Name	Term	Post	Start	End	Type	Hrs/wk	Payroll	End Rsn	Wks/yr	Superan	Post Reason	Origin	Destin
Green Abbey School	MW	MID	03/05/2019		P	5			38			OTHEDU	

Code	Start Date	End Date	Comments	Matched	Change Status
MIDS	03/05/2019			Unmatched	Change

Code	Start Date	End Date

In the **Service** tab:

- If the **Match** button is selected for the linked unmatched Service in the **Service** tab then all buttons are enabled for the Role.
- If the **Add** button is selected for the linked unmatched service in the **Service** tab, then the roles will be added as a new record alongside the new scales and allowances.
- If the **Reject** button is selected for the linked unmatched Service in the **Service** tab, then the roles will be rejected alongside the new scales and allowances.
- If the **Discard** button is selected for the linked unmatched Service in the **Service** tab, then the roles will be discarded alongside the new scales and allowances. A message will not be sent to the school.

### Unmatched role with no matching or potentially matching roles

Where there is an unmatched incoming record with no existing matches available in One, the **Add**, **Reject** and **Discard** buttons are enabled. The **Match** button is disabled.

Click the **Add** button to accept the incoming school values and add a new Roles record in One.

## Suspense

Roles

Incoming School Values

Code	Start Date	End Date	Comments	Matched	Change Status
MIDS	03/05/2019			Unmatched	Change

Current One Values

Code	Start Date	End Date

### Unmatched roles with one or more potential matches

Where there is an unmatched incoming record with one or more potential matches available in One, the **Match**, **Add**, **Reject** and **Discard** buttons are enabled.

To add the incoming record to the One database, click the **Add** button.

To match the incoming data to a One record by Role ID, highlight the relevant One record and click the **Match** button.

After matching the incoming record to a One record, any conflicts are highlighted in **red**. The status in the **Matched** column changes from **Unmatched** to **Matched**. The **Accept**, **Reject** and **Discard** buttons are enabled.

Roles

Incoming School Values

Code	Start Date	End Date	Comments	Matched	Change Status
EXAM	03/05/2019			Matched	Change

Current One Values

Code	Start Date	End Date
EXAM	02/01/2019	

Click **Accept** to overwrite the One values with the incoming school values.

### Auto-Matched service and roles

Where there is a matched incoming service record with one or more matched role records, the **Accept**, **Reject** and **Discard** buttons are enabled. Any conflicts are highlighted in **red**.

Click the **Accept** button to overwrite the One values with the incoming school roles values.

Roles					
Incoming School Values					
Code	Start Date	End Date	Comments	Matched	Change Status
EXAM	03/05/2019			Matched	Change

Current One Values		
Code	Start Date	End Date
EXAM	02/01/2019	

## Employment Details

Change Status	Change		
	<b>Current EMS Value</b>	<b>Green Abbey School Value</b>	
Continuous Service from	01/09/1992	01/09/1992	
Date of Arrival in LEA	01/09/1998	01/09/1998	
Teacher Status	QUAL   Qualified Teacher	QUAL   Qualified Teacher	
Teacher Number	9271231	92712310 *	
QTS Route	ACEP   Annual College Exit - Post grad	ACEP   Annual College Exit - Post grad	
HLTA Status	False	True *	
HLTA Date		01/04/2019 *	
		Comments	
			Accept
			Reject
			Discard

This tab is disabled if employment details are not held in suspense.

Employment details comprise the date of **Continuous Service from**, **Date of Arrival in LEA**, **Teacher Status**, the employee's **Teacher Number**, **QTS Route**, **HLTA Status** and **Date**.

The tab displays the **Current One Value** and the **Incoming School Value**. The **School** data fields show the name of the school from which the data was sent.

The **Change Status** field indicate the status category of the incoming XML message. For example, if there is a change in the data, the **Change Status** field will display "Change".

An asterisk (\*) indicates which incoming school values are in conflict with the One values.

The **Comments** field displays any remarks present in the incoming school XML message. For the initial incoming data change a comment is optional.

Employment Details can be processed as follows:

- Click the **Accept** button to update the One database with the incoming school values.

Any incoming values which are not valid One values will not be accepted. For the incoming data to be accepted, the relevant value in One must be changed, otherwise the data item must be **Discarded** or **Rejected**.

If there is data that does not match the Business Rules (e.g. a date is in an invalid format), a rejection message is displayed. It is not possible to accept this data.

**NOTE:** In the case of invalid lookups users can keep the data in suspense without processing and add the lookup into One Personnel User Codes. Users can then return to suspense to accept the data. The data should have been synchronised using the SIMS Lookup Builder.

- Click the **Reject** button to reject the incoming values.

This displays a popup Comment window, into which details can be entered explaining why the data has been rejected. This information is then added to a database table, and will be returned to the school when the school requests to download messages from One.

Where data is rejected because it does not match the Business Rules (e.g. a date comes in an invalid format), a rejection message is displayed giving an explanation of the rejection.

- Click the **Discard** button.

When the **Discard** button is clicked all incoming data for the highlighted employee is cleared from the inbound tables and the **Suspense** browse. An entry is made in the **Import Error Log** identifying the data that was discarded and the date and time that it was discarded.

## Name History

This tab is disabled if there is no name history data held in suspense.

The **Name History** data is comprised of: **Chosen Surname**, **Chosen Forename** (the "Chosen" names are the names preferred by the employee), **Legal Surname**, **Legal Forename**, **Middle Name** and **Date of Change**.

The **Change Status** field indicate the status category of the incoming XML message. For example, if there is a change in the data, the **Change Status** field will display "Change".

An asterisk (\*) indicates which incoming school values are in conflict with the One values.

The **Comments** field displays any remarks present in the incoming school XML message. For the initial incoming data change a comment is optional.

<b>Change Status</b>	Change				
<b>Current EMS Values</b>					
<b>Chosen Surname</b>	<b>Chosen Forename</b>	<b>Legal Surname</b>	<b>Legal Forename</b>	<b>Middle Name</b>	<b>Date of Change</b>
Jones	Jane	Jones	Jane		15/10/2016
<b>Green Abbey School Value</b>					
<b>Chosen Surname</b>	<b>Chosen Forename</b>	<b>Legal Surname</b>	<b>Legal Forename</b>	<b>Middle Name</b>	<b>Date of Change</b>
Darby	Jane	Darby	Jane		03/05/2019
<b>Comments</b>					

Name History can be processed as follows:

- Click the **Accept** button to update the One database with the incoming school values.

Any incoming values which are not valid One values will not be accepted. For the incoming data to be accepted, the relevant value in One must be changed, otherwise the data item must be **Discarded** or **Rejected**.

If there is data that does not match the Business Rules (e.g. a date is in an invalid format), a rejection message is displayed. It is not possible to accept this data.

**NOTE:** In the case of invalid lookups users can keep the data in suspense without processing and add the lookup into One Personnel User Codes. Users can then return to suspense to accept the data. The data should have been synchronised using the SIMS Lookup Builder.

- Click the **Reject** button to reject the incoming values.

This displays a popup Comment window, into which details can be entered explaining why the data has been rejected. This information is then added to a database table, and will be returned to the school when the school requests to download messages from One.

Where data is rejected because it does not match the Business Rules (e.g. a date comes in an invalid format), a rejection message is displayed giving an explanation of the rejection.

- Click the **Discard** button.

When the **Discard** button is clicked all incoming data for the highlighted employee is cleared from the inbound tables and the **Suspense** browse. An entry is made in the **Import Error Log** identifying the data that was discarded and the date and time that it was discarded.

## Address

Incoming Addresses					
Start Date	End Date	Address	Change Status	Comments	Base Name
16/11/2007		37, Falmouth Grove, Swindon, SN3 1EL	Change		Green Abbey School

Matched EMS Address

37, Falmouth Grove, Swindon, SN3 1EL

EMS Address

Match + Add

Employee Linked Addresses			
Start Date	End Date	Address	Correspondence
16/11/2007		37, Falmouth Grove, Swindon, SN3 1EL	<input type="checkbox"/>
16/11/2007		21, Falmouth Grove, Swindon, Wiltshire, SN3 1EL	<input type="checkbox"/>

Employee Address Linking

Match + Add Accept Reject Discard

This tab is disabled if there is no address data held in suspense.

The **Incoming Addresses** are listed in a browse showing the **Start** and **End Dates**, the incoming **Address**, the **Change Status**, any **Comments** (related to the change status) and the **Base Name**.

If an incoming address is auto-matched to an existing address in the One Address database, the One Address is displayed in the **Matched One Address** field.

## Suspense

If the incoming address does not exist in the One address database (i.e. the Matched One Address field is blank) the **Add** and **Match** buttons are enabled. You have the option to either **Match** the incoming address to the One Address database or **Add** it as a new address to the database.

Click the **Discard** button to clear the Address data from suspense. No message will be sent back to the school.

## Address Processing

In One, addresses are held in two tables. The first table holds **Dwelling** information relating to a single address, such as a building number (e.g. number 70). The second table holds information at **Street** level, including postcode (e.g. Thames Avenue, Bedford, MK99 4ZZ). As such, each record in the street table is likely to be associated with many records in the dwelling table.

As a person can have more than one address (e.g. home, work, bank), and any given address will often be used by more than one person, One uses an intermediate table to associate people with addresses. The table is called ADDR\_LINK. A person is linked to a dwelling by writing a record containing the person's unique identifier and the dwelling's unique identifier to this table.

The following scenarios highlight the ways that addresses can be processed.

### Adding an Unmatched Address

Incoming addresses that cannot be matched to an address in the One database must be added manually, prior to being linked to the employee.

Start Date	End Date	Address	Change Status	Comments	Base Name
06/08/1989		37, Falmouth Grove, Swindon, SN3 1EL	Change		Green Abbey School

Matched EMS Address

To add an address:

1. Click the **One Address Add** button. This opens the **Select a Matching EMS Address** pop up, displaying the incoming address.

Select a Matching EMS Address

Dwelling / Building

Flat Name

Building Name

Number 37

Address In England

Street

Postcode SN3 1EL Falmouth Grove, Swindon, SN3 1EL

Save Cancel Help

2. Click **Save**.

If the incoming street exists in the One database, this will add the new dwelling to the existing street information. The following dialog is displayed:



If the incoming street does not exist in the One database, both a new dwelling and a new street address are added. The following dialog is then displayed.



3. Click the **Yes** button to add the incoming address to the One database.

The address is then displayed in the **Matched One Address** panel and the **One Address Add** button is disabled.

### Manually Matching an Address

Incoming addresses that cannot be auto-matched to an address in the One database can be matched manually, prior to being linked to the employee.

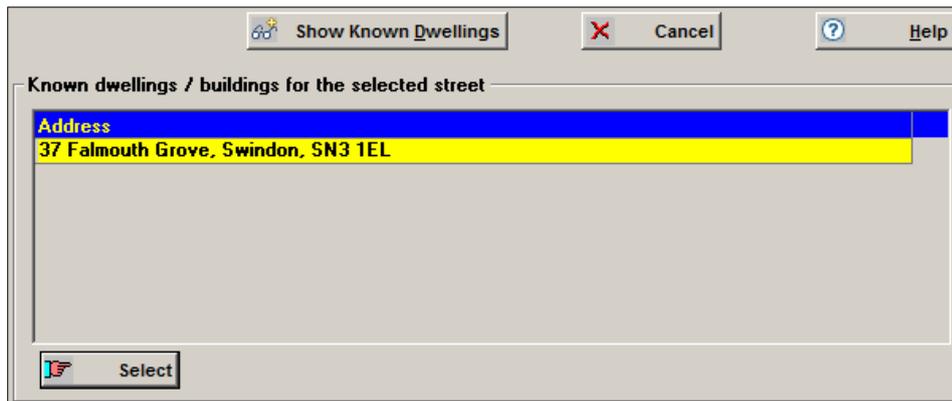
To match an address:

1. Click the **One Address Match** button to search the One database for a potential match. The **Select a Matching EMS Address** pop up opens, displaying the incoming address.

2. Click the **Show Known Dwellings** button.

The **Select a Matching One Address** dialog is extended to display a list of dwellings recorded in the One Address database for the incoming Street Address.

## Suspense

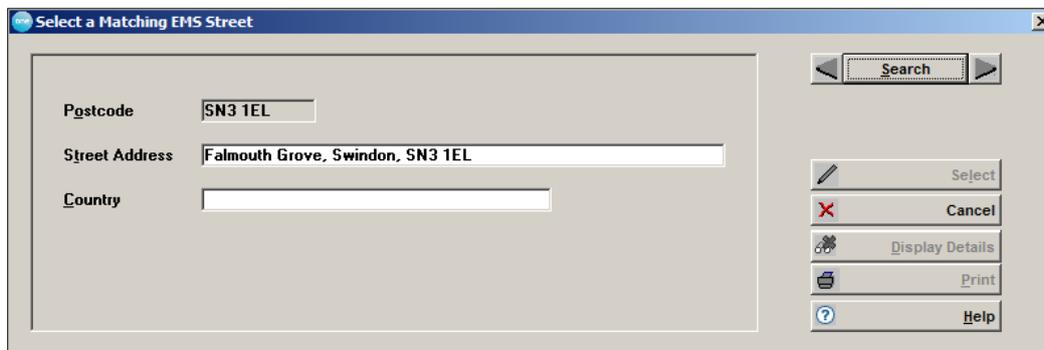


3. Highlight the required dwelling/building from the list. Click **Select** to match the incoming address to the existing address.

If a One address is not found which is a suitable match for the incoming address:

1. Click the Post Code browse  button

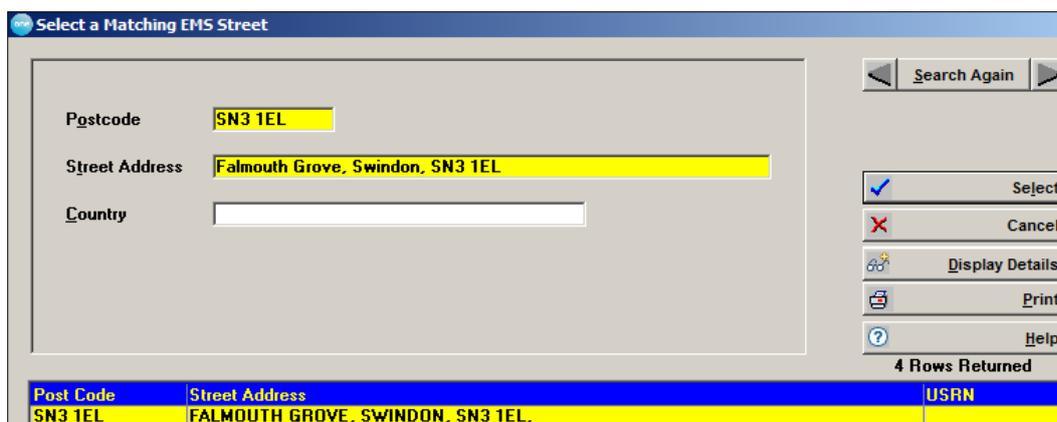
The **Post Code** and **Street Address** fields are pre-populated with the incoming address data.



The **Street Address** can be modified, allowing users to search on partial street information. Alternatively, to widen the search using just the Post Code, delete the address information displayed in the **Street Address** field

2. Click **Search**.

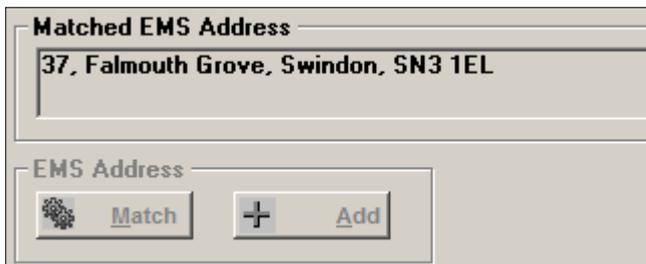
This will extend the dialog to display a list of Street addresses that are linked to that Post Code.



3. Highlight the required dwelling/building from the list. Click **Select** to match the incoming address to the existing address.

If there are no suitable addresses available for the post code, click the **Cancel** button and add the incoming address manually.

The address is displayed in the **Matched One Address** panel and the **One Address Match** button is disabled.



Once the incoming address has been matched or added, it must be linked to the employee.

### Employee Linked Addresses

**Employee Linked Addresses** will display all the addresses that are linked to the employee (including current, previous and future addresses). The fields displayed are **Start Date**, **End Date**, **Address** and **Correspondence** checkbox (checked if the address is a correspondence address).

The **Employee Address Linking** buttons (**Add** and **Match**) allow users to link the incoming address to the employee or replace an existing link to the employee with a link to the incoming address. If there are no addresses linked to the employee, only the **Add** button is enabled.

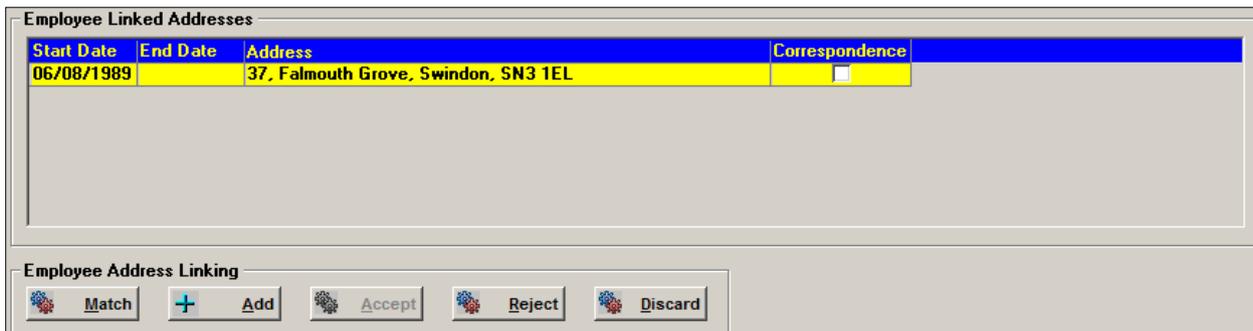
Once the incoming address has been added or matched to an employee the **Accept** and **Reject** buttons are enabled, allowing users to confirm or cancel the changes that have been made.

If the incoming address is rejected, it is discarded and a message is displayed in the Error Log.

Click the **Discard** button to clear the Address data from suspense. No message will be sent to the school.

### Matching to an existing Linked Address

In this context **Match** is actually a “replace” function.



Click the **Employee Address Linking** button to link the incoming address to the employee and remove the link to the existing address. This will clear the suspense record.

**NOTE:** The existing address will remain in the One database although it is no longer linked to the employee in question.

### Adding a new Linked Address

Click the **Add** button to link the incoming address to the employee and clear the suspense record.

## Telephone Details

The **Telephone Details** tab is greyed out if there is no phone data held in suspense.

**NOTE:** If there is both address and telephone data in suspense users will not be able to process the Telephone data (as the **Accept** and **Discard** buttons are disabled) until the **Address** data has been processed.

Telephone data is comprised of: **Home Phone, Business Phone, Mobile Phone** and **Fax**.

The tab displays the **Current One Value** and the **Incoming School Value**. The **School** data fields show the name of the school from which the data was sent.

The **Change Status** field indicate the status category of the incoming XML message. For example, if there is a change in the data, the **Change Status** field will display “Change”.

An asterisk (\*) indicates which incoming school values are in conflict with the One values.

The **Comments** field displays any remarks present in the incoming school XML message. For the initial incoming data change a comment is optional.

Telephone Details can be processed as follows:

- Click the **Accept** button to update the One database with the incoming school values.

Any incoming values which are not valid One values will not be accepted. For the incoming data to be accepted, the relevant value in One must be changed, otherwise the data item must be **Discarded** or **Rejected**.

If there is data that does not match the Business Rules (e.g. a date is in an invalid format), a rejection message is displayed. It is not possible to accept this data.

- Click the **Reject** button to reject the incoming values.

This displays a popup Comment window, into which details can be entered explaining why the data has been rejected. This information is then added to a database table, and will be returned to the school when the school requests to download messages from One.

Where data is rejected because it does not match the Business Rules (e.g. a date comes in an invalid format), a rejection message is displayed giving an explanation of the rejection.

- Click the **Discard** button.

When the **Discard** button is clicked all incoming data for the highlighted employee is cleared from the inbound tables and the **Suspense** browse. An entry is made in the **Import Error Log** identifying the data that was discarded and the date and time that it was discarded.

**Note:** SIMS.net Other telephone number(s) are discarded by One and are logged in the **Import Error Log**.

## Qualifications

The **Qualifications** tab is disabled if there is no qualifications data held in suspense.

The tab displays the **Incoming School Values** and the **Current One Values**. A red highlight in a field indicates the incoming school values that are in conflict with the One values. The school data fields show the name of the school from which the data was sent.

Qualifications

Incoming School Values

Base Name	Qualification	Subject	Second Subject	Level	Class Of Degree	Country
Green Abbey School	UNKWN	X900		NVQ4	15	

Comments

Current One Values

Qualification	Subject	Second Subject	Level	Class Of Degree	Country Of Origin
UNKWN	X900		NVQ4	15	BRI

Match

Add

Accept

Reject

Discard

The **Qualifications** data is comprised of: **Qualification, Subject, Second Subject, Level, Class of Degree, Country of Origin, Title and Date Awarded**. Additional fields indicate **Verified, Matched and Change Status**.

**Matched** indicates whether the incoming absence has been matched to an qualification in One and **Change Status** indicates the status of the incoming XML message. For example, if there is a change in the data, the **Change Status** field will display "Change".

The **Comments** field displays any remarks present in the incoming school XML message. For the initial incoming data change a comment is optional.

Qualifications can be processed as follows:

- Click the **Accept** button to update the One database with the incoming school values.

Any incoming values which are not valid One values will not be accepted. For the incoming data to be accepted, the relevant value in One must be changed, otherwise the data item must be **Discarded** or **Rejected**.

If there is data that does not match the Business Rules (e.g. a date is in an invalid format), a rejection message is displayed. It is not possible to accept this data.

## Suspense

- Click the **Reject** button to reject the incoming values.

This displays a popup Comment window, into which details can be entered explaining why the data has been rejected. This information is then added to a database table, and will be returned to the school when the school requests to download messages from One.

Where data is rejected because it does not match the Business Rules (e.g. a date comes in an invalid format), a rejection message is displayed giving an explanation of the rejection.

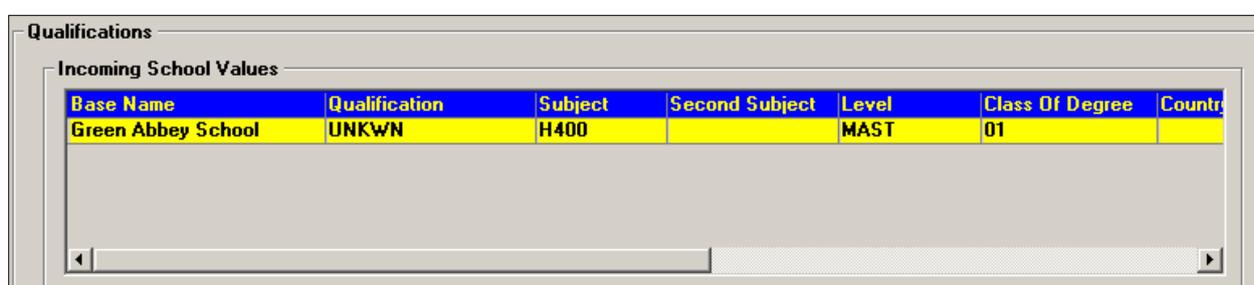
- Click the **Discard** button.

When the **Discard** button is clicked all incoming data for the highlighted employee is cleared from the inbound tables and the **Suspense** browse. An entry is made in the **Import Error Log** identifying the data that was discarded and the date and time that it was discarded.

- Click the **Match** or **Add** buttons. The function of these buttons is described below.

## Unmatched Qualification Record

The **Incoming School Values** panel displays the **Qualification, Subject, Second Subject, Level, Class of Degree, Country of Origin, Title** and **Date Awarded** for the incoming Qualification record.



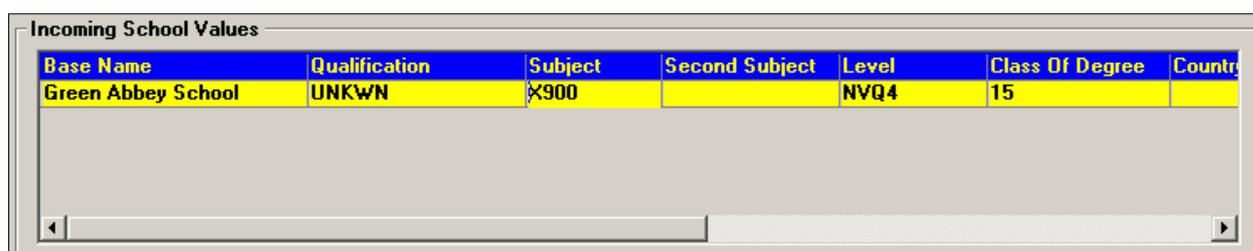
Base Name	Qualification	Subject	Second Subject	Level	Class Of Degree	Country
Green Abbey School	UNKWN	H400		MAST	01	

The **Matched** column displays the value **Unmatched**, indicating that this is an **Unmatched Qualification**. (i.e. it has not been previously matched to a Qualification in One.)

- If an **Unmatched Qualification** record is sent by a school and there are no qualifications in One to match against, then only the **Add, Reject** and **Discard** buttons are enabled. The **Match** and **Accept** buttons are disabled.

To add the incoming qualification:

Highlight an incoming qualification record. Click the **Add** button to accept the incoming school values and add a new qualification record in One.



Base Name	Qualification	Subject	Second Subject	Level	Class Of Degree	Country
Green Abbey School	UNKWN	X900		NVQ4	15	

- If an **Unmatched Qualification** record is sent by a school and there are existing qualifications in the One database that may match the incoming SIMS.net data, the **Match, Add, Reject** and **Discard** buttons are enabled. The **Accept** button is disabled.

To match the incoming data to a One record by Qualification ID:

- Highlight the relevant record and then click the **Match** button.

After matching the incoming record to a One record any conflicts are highlighted in red. The status in the **Matched** column changes from **Unmatched** to **Matched**. The **Accept, Reject** and **Discard** buttons are enabled. The **Match** and **Add** buttons are disabled.

Qualification	Subject	Second Subject	Level	Class Of Degree	Country Of Orig
UNKWN	X900		NVQ4	15	BRI

Match  
Add  
Accept  
Reject  
Discard

- Click the **Accept** button to overwrite the One values with the incoming school values.

### Matched Qualification Records

After matching the incoming record to a One record (either automatically or manually), any conflicts are highlighted in **red** and the status in the **Matched** column changes from **Unmatched** to **Matched**.

To match a qualification:

- Highlight the relevant record and then click the **Match** button.

After matching the incoming record to a One record any conflicts are highlighted in red. The status in the **Matched** column changes from **Unmatched** to **Matched**. The **Accept**, **Reject** and **Discard** buttons are enabled. The **Match** and **Add** buttons are disabled.

Qualification	Subject	Second Subject	Level	Class Of Degree	Country Of Orig
UNKWN	X900		NVQ4	15	BRI

Match  
Add  
Accept  
Reject  
Discard

- Click the **Accept** button to overwrite the One values with the incoming school values.

### Auto-Matched Qualification Record

If a qualification record is sent by a school and has been auto-matched, the incoming qualification is placed in conflict if there are any differences between the incoming and current values. These are highlighted in **red**. The **Accept**, **Reject** and **Discard** buttons are enabled, but the **Match** and **Add** buttons are disabled.

To process an auto- matched qualification:

Click the **Accept** button to overwrite the One values with the incoming school values.

Qualification	Subject	Second Subject	Level	Class Of Degree	Country Of Orig
UNKWN	X900		NVQ4	15	BRI

Match  
Add  
Accept  
Reject  
Discard

## Absences

**Absences**

Incoming School Values

Base Name	Type	Illness	Pay Rate	Start Date	Start Time	End Date	End Time
Green Abbey School	SIC	EYES	F	01/05/2019	08:00	03/05/2019	23:59

Comments

Current EMS Values

Base Name	Type	Illness	Pay Rate	Start Date	Start Time	End Date
Green Abbey School	SIC	ALRG	F	01/05/2019	08:00	03/05/2019

Buttons: Absences, Match, Add, Accept, Reject, Discard

The **Absences** tab is disabled if there is no absences data held in suspense.

A red highlight in a field indicates the incoming school values that are in conflict with the One values. The tab shows all absence records in One that are related to the employee for whom data is held in suspense.

Both incoming and One absence values display **Base Name**, (Absence) **Type**, **Illness** (category), **Pay Rate**, **Start Date**, **Start Time**, **End Date**, **End Time**, **Days Absent**, **No. of Hours Absent**, **Industrial Injury** and **SSP Exc. Adv** details.

The **Incoming School Values** panel displays two additional columns - **Matched** (indicates whether the incoming absence has been matched to an absence in One) and **Change Status** (indicates the status of the incoming XML message). For example, if there is a change in the data, the **Change Status** field will display "Change".

Absences can be processed as follows:

- Click the **Accept** button to update the One database with the incoming school values.

Any incoming values which are not valid One values will not be accepted. For the incoming data to be accepted, the relevant value in One must be changed, otherwise the data item must be **Discarded** or **Rejected**.

If there is data that does not match the Business Rules (e.g. a date is in an invalid format), a rejection message is displayed. It is not possible to accept this data.

- Click the **Reject** button to reject the incoming values.

This displays a popup Comment window, into which details can be entered explaining why the data has been rejected. This information is then added to a database table, and will be returned to the school when the school requests to download messages from One. A blank **Absences** data group is sent back to the school, indicating that an **Unmatched Absence** has been rejected

Where data is rejected because it does not match the Business Rules (e.g. a date comes in an invalid format), a rejection message is displayed giving an explanation of the rejection.

- Click the **Discard** button.  
This clears the selected absence from suspense but does not send a message back to the school.
- Click the **Match** or **Add** buttons. The function of these buttons is described below.
- Click the **Absences** button to view details of the employee’s absence records in One.

### Unmatched Absence Record

The **Incoming School Values** panel will display the **Base Name** (this is the name of the school which sent the Absence record), **(Absence) Type**, **Illness** (category), **Pay Rate**, **Start Date**, **Start Time**, **End Date**, **End Time**, **Days Absent**, **No. of Hours Absent**, **Industrial Injury** and **SSP Exc. Adv.** for the incoming Absence record. The **Matched** column will display the value **Unmatched**, indicating that this is an **Unmatched Absence** (i.e. an absence that has not been previously matched in One).

The **Comments** field displays any comments present in the incoming school XML message.

- If an unmatched absence record is sent by a school and there are no absences in One to match against, only the **Add**, **Reject** and **Discard** buttons are enabled. The **Match** and **Absences** buttons are disabled.

The **Absences** button allows users to view all the absences held for the employee in the One database. When the **Absences** button is clicked, a modal, read-only version of the **One Personnel Absences** tab is displayed.

- If an unmatched absence record is sent by a school and there are existing absences in One that may match the incoming SIMS.net data, the **Add**, **Reject**, **Discard**, **Match** and **Absences** buttons are all enabled.

The **Absences** button allows users to view all the absences held for the employee in the One database. When the **Absences** button is clicked, a modal, read-only version of the **One Personnel Absences** tab is displayed.

The **Current EMS Values** panel displays values for all potential matching absences.

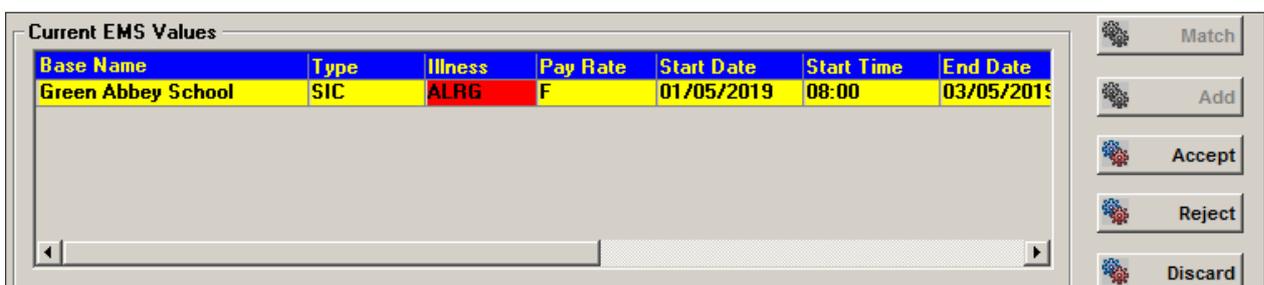
- If an unmatched absence record is sent by a school and there is no current service record, then only the **Absences** button is enabled. **Add** or **Match** the service record in the **Services** tab to activate the buttons in the **Absence** tab.

### Auto-Matched Absence Record

If an absence record is sent by a school and has been auto-matched, the incoming absence is placed in conflict if there are any differences between the incoming and current values. These are highlighted in **red**.

The **Accept**, **Reject** and **Discard** buttons are enabled, but the **Match** and **Add** buttons are disabled. The **Absences** button is also enabled.

The **Absences** button allows users to view all the absences held for the employee in the One database. When the **Absences** button is clicked, a modal, read-only version of the **One Personnel Absences** tab is displayed.



## Matched Absence Records

After matching the incoming record to a One record (either automatically or manually), any conflicts are highlighted in red and the status in the **Matched** column changes from **Unmatched** to **Matched**.

**IMPORTANT NOTE:** If there is both service data held in suspense (i.e. where the **Service Suspense** tab is enabled) and absences data held for a given employee, the **Absences** tab is enabled but all of its buttons are disabled. Users must process the service data held in suspense before processing the absences data. This is because new absences must be linked to at least one service record.

**NOTE:** One Personnel users are advised to link at least one Service record to an absence. Those Services that are active at some point between the Absence start and end dates are available to be linked.

When an incoming absence is linked to a service or services which exist at the base that sent the absence data, then One retains the link(s) and inserts the absence into the One database.

When an incoming absence is linked to a service that exists at a base that did not send the absence data, One creates the link(s), inserts the absence in the One database, and then sends this absence record to the bases where the linked service records are held.

**IMPORTANT NOTE:** B2B:Personnel will only transfer those Absences which are current, defined for the future, or have ended within the last 24 months.

Absences data changes in One Personnel are only sent to those schools that have service records that are current, defined in the future or have ended in the last 12 months and have been linked to an Absence.

If an absence is not linked to a Service record (that is current, defined in the future or has ended in the last 12 months) in One, then these changes will not be sent to the SIMS.net school.

## Processing Absence Records

- Adding an unmatched absence record:

Highlight an incoming absence record and click **Add**.

Absences							
Incoming School Values							
Base Name	Type	Illness	Pay Rate	Start Date	Start Time	End Date	End Time
Green Abbey School	SIC	ALRG	F	01/05/2019	08:00	03/05/2019	23:59

- Matching an unmatched absence record:

1. Select the appropriate Absence record in the **Current EMS Values** panel and then and click **Match**.

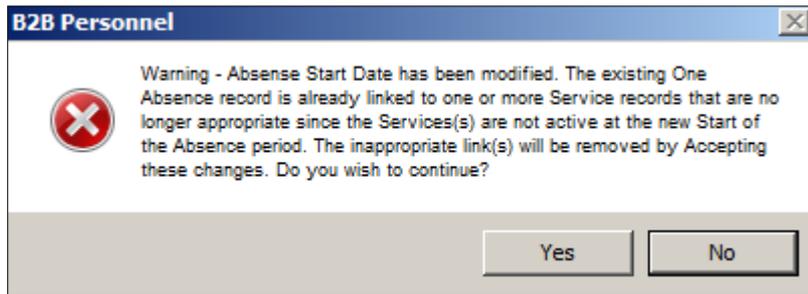
Any differences between the incoming and current absence data are highlighted in red. The **Accept** button is enabled and the **Match** button is disabled.

2. Click the **Accept** button to overwrite the values for the absence in One with the incoming school's absence data.

- Processing an auto-matched absence record with data in conflict:

Click the **Accept** button to overwrite the values for the absence in One with the incoming school's absence data.

If the incoming absence is linked to one or more service records in One and the incoming changes mean that the Absence is no longer active during the linked Service(s), One displays the following message:

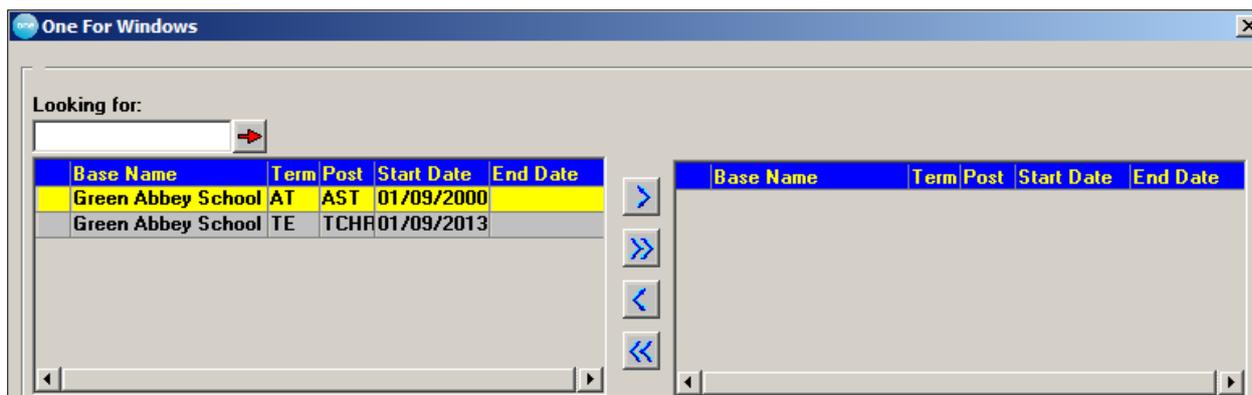


- Select **No** to close the message box.
- Select **Yes** to overwrite the values in the One database with the incoming Absence values. Any service links which are no longer valid are removed

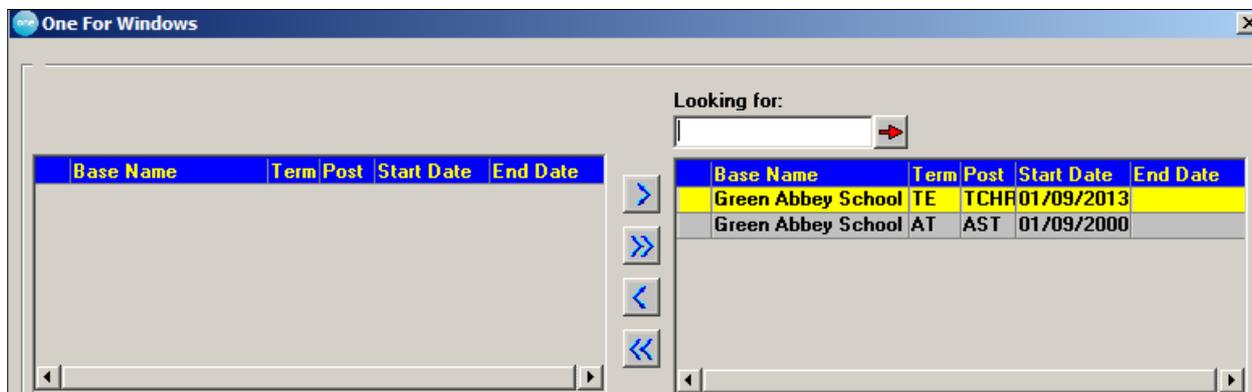
For all options:

If there is only one service record active during the start and end date of the incoming absence, the newly added absence is automatically linked to that service record in One.

If there is more than one service record active during the start and end date of the incoming absence, the **Select Service Linked to an Absence** dialog is displayed. Users will have the option to link this incoming absence to one or many services.



Select the service(s) to link to the absence by highlighting those service(s) and clicking the **chevron** button for a single service or the **double chevron** for multiple services.



Click the **Save** button to link the selected service(s) to the Absence.

Clicking the **Cancel** button without selecting any services to link to the absence will display the following message:

## Suspense



In this case, the Absence is added to the One database for the employee without being linked to a service.

**NOTE:** In SIMS.net there is an additional field defined for an Absence record: the **Annual Leave** checkbox field. There is no equivalent field in One. Therefore, to update this field in SIMS.net an additional tag is sent.

When the **Absences** data group is sent from One to SIMS.net the additional **<AnnualLeave>** tag is sent. If the value for the **Type of Absence** field in One Personnel is set to **A** (Annual Leave), then the value for this tag is sent as **True**. If the value for the **Type of Absence** field in One Personnel is **not** set to **A** (Annual Leave), then the value for this tag is sent as **False**.

# 07 | B2B:Personnel Error Log

## Viewing Error Log Records

### V3 client | Personnel | Tools | Module Administration | B2B Error Log

Any errors with the imported data (for example, a mismatch between the incoming codes and the existing One codes) are added to **Personnel | Tools | Module Administration | B2B Error Log**.

Log Date	Employee Name	Base Name	XML ID
03/05/2019	Darby, Jayne	Green Abbey School	37

Message/Reason (C) The following Suspension Details have been discarded. Start Date: 02/05/2019; End Date: 03/05/2019; Reason: Swearing

The **B2B Error Log** maintains separate logs for import and export processes. Each log is generated when records are either imported or exported via B2B:Personnel.

Error details generated while importing data into One from SIMS.net are displayed on the **Import** sub tab. Error details generated while exporting data from One to SIMS.net are displayed on the **Export** sub tab.

The error log shows the **Log Date** of the import/export, **Employee Name**, **Base Name** and **XML ID**. The **XML ID** is used when trying to resolve problems which cannot be rectified within the B2B:Personnel procedure, allowing users to identify the relevant import or export record in SIMS.net or One.

Error logging functionality is only available with the correct user rights and a valid B2B:Personnel license.

The **Looking for** box allows users to locate an error message in the browse by entering the first few characters of a given data field, (i.e. **Log Date**, **Employee** or **Base**) and clicking the cogwheels icon. It displays a list of employee records which failed validation during import or export. This log is for information purposes and errors cannot be resolved within One.

The **Message/Reason** box, displayed at the bottom of each tab, shows Oracle or One error messages related to the highlighted employee.

Click the **Print** button to send the list of employees for whom the B2B:Personnel import or export process failed to a defined printer.

## ***B2B:Personnel Error Log***

Click the **Delete** button to delete the highlighted imported or exported employee record.

Click the **Delete All** button to clear the **Import** or **Export Log** of all records.

***NOTE:*** Records are continuously added to the B2B Error Log. Therefore, it is recommended that users keep the logs to a manageable size by periodically purging the contents.

# 08 | Appendix

## Additional User and Guidance Notes

The following must be taken into consideration before transferring employee data between SIMS.net and One.

No.	Notes
1	Once the B2B:Personnel licence has been entered in <b>One Module Launcher   Tools   Licensing</b> , users must log out of One and log in again to activate it.
2	<p>Before running B2B:Personnel it is strongly advised that users set the One <b>Parameter Value</b> to <b>F</b> (False) for the Parameter <b>Code BASE_LINKS</b>.</p> <p>This is done via <b>Tools   System Administration   LEA Defaults</b>.</p> <p>Setting this value to False prevents users from updating the <b>Service Term</b> and the <b>Base Name</b> for a service from other modules. Updating <b>Service Term</b> and <b>Base Name details</b> for a service from other modules will cause B2B:Personnel data to be rejected by SIMS.net.</p>
3	<p>It is possible to enter multiple home addresses for an employee in One, while entering an <b>End Date</b> for an address is not mandatory. Therefore, it is possible for an employee to have many current home addresses in One without any <b>End Dates</b> defined for them.</p> <p>In SIMS.net, however, an employee can only have one current home address. Therefore, the business rule for exporting an address to SIMS.net from One is as follows:</p> <ol style="list-style-type: none"> <li>1. Only export a current home address if it is available (a current address is an address where the <b>Start Date</b> is previous to the current system date and the <b>End Date</b> is null or after the current system date).</li> <li>2. If there is more than one current home address then: <ol style="list-style-type: none"> <li>a) Send the address that has the correspondence flag set against it.</li> <li>b) If none of the home addresses in One have the correspondence flag set then send the most recently updated address.</li> </ol> </li> <li>3. If there are no current home addresses that satisfy the above conditions then no address is sent to SIMS.net.</li> </ol> <p>Addresses in One are only sent across to SIMS.net if they have a <b>Start Date</b> defined, as <b>Start Date</b> is a mandatory field in SIMS.net.</p> <p>If a new address is added in One with its <b>Correspondence</b> checkbox left unchecked the previous address will be sent to SIMS.net rather than the newly added address.</p> <p>To ensure that the newly added address is sent across to SIMS.net:</p> <ol style="list-style-type: none"> <li>1. Check the <b>Correspondence</b> checkbox for this newly added address.</li> <li>2. Uncheck the <b>Correspondence</b> checkbox of the previous address before you add the new address.</li> <li>3. Enter an <b>End Date</b> to the previous address before you add the new address.</li> </ol>
4	<p>One can import but not export telephone numbers to SIMS.net.</p> <p>If users do not wish to accept the incoming SIMS.net telephone numbers from the <b>Suspense Processing</b> screen they must be <b>Discarded</b>, as they cannot be <b>Rejected</b> back to SIMS. In this scenario, the telephone information sent by SIMS.net will not be imported and the telephone numbers that are currently held in One will not be sent to SIMS.net. However, the One user can view the SIMS.net discarded telephone numbers in the <b>One Error Log</b>.</p> <p>If SIMS.net does not have a telephone number to export then the telephone fields will appear as blank values in the <b>One Suspense Processing</b> screen.</p>

No.	Notes
5	<p>SIMS.net can export all telephone number types (i.e. <b>Home, Fax, Work, Mobile, Alternate Home</b> and <b>Other</b>). However, One will discard the <b>Other</b> and <b>Alternate Home</b> numbers and report them to the error log. This is because One does not have an <b>Other</b> or <b>Alternate Home</b> type field for telephone numbers.</p> <p>SIMS.net users can enter multiple telephone numbers for <b>Home, Fax, Mobile</b> and <b>Work</b>. All these numbers are sent to One. However, One can only store one telephone number for <b>Home, Fax, Mobile</b> and <b>Work</b>. If SIMS.net sends more than one number for each type then the numbers are discarded and reported to the One Error Log.</p>
6	<p>If there is data for an employee held in the One <b>Suspense Processing</b> screen, users must <b>Refresh</b> the data in order to lock the employee record and prevent the employment record from being edited.</p>
7	<p>When a service is added via B2B:Personnel in One (i.e. when the service data sent by SIMS.net is added through <b>Suspense Processing</b> in One after being imported), the <b>Current Location</b> field in the <b>Service</b> screen of One Personnel will not be populated with any data. If users wish to enter data into the <b>Current Location</b> field in the service screen then they must enter this data manually in One.</p> <p>The <b>Current Location</b> field in One displays the name of the base that the employee is currently employed at. However, it is not transferred via B2B:Personnel.</p>
8	<p>Auto matching for scales/services and allowances checks incoming records against current records to return one matched record. If there is a difference between the incoming and current data then the data is treated as not matched.</p> <p>If there is a difference in services/scales or allowances then only the data group where there is a difference is displayed in the <b>Suspense Processing</b> screen.</p>
9	<p>If changes in Core Identifiers are received from another base while there is already data in suspense with changed Core Identifiers, both bases are displayed in suspense.</p> <p>The second base is only displayed in the <b>Suspense Processing</b> screen if both sets of core identifiers are the same.</p>
10	<p>New allowance records which are rejected by SIMS.net and exported back to One as an unmatched allowance are held in One suspense. The incoming 'Null' numeric value is displayed as 0 (zero) in the <b>FTE</b> and <b>Amount</b> columns. This 0 (zero) value denotes where the incoming value is Null.</p> <p>New allowance records which are rejected by SIMS.net and exported back to One as an unmatched allowance are held in One suspense. The incoming 'Null' numeric values are displayed as (0) zero in the <b>Wks/Yr</b> and <b>Hrs/Wk</b> columns. This 0 (zero) value denotes where the incoming value is Null.</p>
11	<p>Any Rejected Rejected Changes sent from SIMS must be accepted by One.</p> <p>Therefore, when One receives a Rejected Rejected Change with invalid data it will send another Rejected Rejected Change message. However, this functionality is not available in SIMS.net. Therefore, when a Rejected Rejected Change is rejected due to invalid data no message is sent to SIMS.net.</p>
12	<p>Any new addresses that are held in the One <b>Suspense Processing</b> screen will be modified in SIMS.net and sent to One. The recent changes will not overwrite the previous changes for this address in the <b>Suspense Processing</b> screen. Therefore there will be two records for the same address held in One <b>Suspense Processing</b> screen.</p>
13	<p>All address fields in SIMS.net have a length of 40 characters with the exception of <b>House Number</b>, which has 50 characters. In One all field lengths are 35 characters with the exception of <b>House Number</b>, which has 5 characters.</p> <p>Address fields imported into One via B2B:Personnel are truncated at 35 characters. This also applies to <b>House Number</b>. Therefore, an address of "231/233 Bedford Drive" would be truncated to "231/2" Bedford Drive as One only stores 5 characters for <b>House Number</b>.</p>

No.	Notes
14	There are differences in the name fields between SIMS.net and One. SIMS.net allows 60 characters for all name fields whereas One allows 30 characters for <b>Chosen Surname</b> and <b>Legal Surname</b> , 15 characters for <b>Chosen</b> and <b>Legal Forename</b> and 25 for <b>Middle Name(s)</b> . The names sent by SIMS are truncated if they are too long for One to store. This is reported to the One error log.
15	The field length for a telephone number in SIMS.net is 20 characters. In One the field length for a telephone number is 18. The numbers sent by SIMS are truncated if they are too long for One to store. This is reported to the One error log.
16	If you receive employee data from SIMS at the same time that users update that employee's details in One, this data is placed in suspense. The One <b>Suspense Processing</b> screen will display the recently saved changes as a conflict with the <b>Accept</b> and <b>Reject</b> buttons enabled.
17	<p>Services that are deleted in One and SIMS.net are sent with a message type of <b>Delete</b>. If the deleted service is accepted in One/SIMS.net via suspense, the associated employee's service/scales/allowances may be deleted.</p> <p>An employee in One can be deleted. When an employee is deleted in One, all <b>Payee Details</b>, <b>Employee Details</b> and service/scales/allowances relating to the employee are also deleted. When this employee deletion is sent to SIMS.net the service data group is sent with a message type of Delete. Therefore, when this deletion is accepted in SIMS.net the service/scales/allowances are deleted but the <b>Payee</b> and <b>Employee Details</b> of the employee are retained.</p> <p>If this service deletion is rejected from SIMS.net, the service data held in SIMS.net is sent across to One. On accepting this incoming data from SIMS.net, One will retain the service data. However, <b>Payee Details</b> and <b>Employee Details</b> are lost.</p>
18	When the last service for an employee is deleted in SIMS.net, One will retain the <b>Employment</b> and <b>Payee Details</b> for the employee but delete the service. Conversely, when the last service for an employee is deleted in One, SIMS.net will retain the <b>Employment</b> and <b>Payee Details</b> for the employee but delete the service.
19	If SIMS.net has exported all employee data to One then the users can navigate to the <b>Job Progress</b> tab in <b>One Module I Administration</b> to view the status of the data being imported into One.
20	Where a post code is not in a valid UK post code format, One will not reject all incoming data but will discard the address to avoid duplicate addresses being generated. This is reported to the error log. In this scenario, if the incoming address is not matched and users reject this unmatched address the address details will be discarded rather than rejected.
21	One has a functionality to delete all employee data from the <b>B2B People Match</b> screen. Therefore, if SIMS.net has exported all employee data to One by mistake, the One user can delete this data without actually importing it into the One database.
22	Non-UK addresses are discarded One, as B2B:Personnel will only transfer addresses with a valid UK format post code.
23	<p>When One exports all employee data it is not possible for SIMS.net users to delete this data without importing into SIMS.net.</p> <p>However, when SIMS.net exports all employee data it is possible for One users to delete this data without importing into One.</p>
24	If users do not have a licence to run B2B:Personnel then the One and SISM.net B2B:Personnel screens are visible but are disabled.
25	B2B:Personnel will transfer all Previous Names as a collection, but if there is a missing <b>Surname</b> , <b>Forename</b> , <b>Legal Surname</b> , and <b>Legal Forename</b> for a previous name One will not transfer this record as part of the <b>Name History</b> record. This is because these fields are mandatory for a previous name.

No.	Notes
26	<p>If a One user is editing an employees record and at the same time data is received for the same employee and this is held in suspense then although the <b>Suspense Processing</b> screen will display the changes saved recently in One as a conflict the <b>Accept</b> and <b>Reject</b> buttons will remain disabled.</p>
27	<p>When an employee is deleted, the relevant core identifiers, service(s) and scale(s) are sent to the outbound queue with message type of <b>Delete</b>, ready to be downloaded by SIMS.net. No other entity is included in the message for that employee.</p> <p>However, if a message is sent from SIMS.net to One before SIMS.net receives the message the incoming data is displayed in suspense.</p> <p>Since this employee has been deleted in One, only the contents of the <b>Basic Details</b> tab are displayed in the suspense if there are conflicts. If the incoming details are rejected then the deletion message will have a message type of <b>Rejected Change</b>.</p>
28	<p>If there is address data held in suspense then all incoming telephone details are also placed in suspense. One is able to process telephone data without processing the corresponding address data first. Once the address data has been processed then it is possible to process the address.</p> <p>This may result in blank telephone data being displayed in One suspense. However, this data can be cleared from suspense by selecting either <b>Accept</b> or <b>Reject</b>. This will not corrupt data.</p>
29	<p>If the incoming SIMS.net address is:</p> <p>Flat3 23/25 'The Hedges' 18, Goldington Road MK40 3NE</p> <p>And the existing One address is:</p> <p>The Hedges 23/25 'Flat3' 18, Goldington Road MK40 3NE</p> <p>The incoming address from SIMS is auto-matched to the existing address in One and will not be displayed in One suspense. This is due to the address matching logic that has been implemented.</p>
30	<p>In SIMS.net a future <b>Date of Change</b> for an employee can be entered for a previous name. If SIMS.net sends a previous name with a <b>Date of Change</b> in the future then One will display an error message when the corresponding <b>Name History</b> is opened. This is because a future <b>Date of Change</b> cannot be entered for a previous name.</p>
31	<p>An employee has three previous names synchronised between One and SIMS.net. One of these names is deleted in One and the other two are sent to SIMS.net. In this scenario, One will find a match for the two incoming previous names, meaning that these names will not be placed in One suspense.</p> <p>As such, the employee will have two previous names in SIMS.net but three previous names in One.</p>
32	<p>If SIMS.net sends home telephone numbers for an employee who has no address in One, these numbers are discarded by One as there is no home address to link the telephone number to.</p> <p>An error message is displayed for every home telephone number that is discarded.</p> <p>Telephone numbers can be attached to an addresses with different area codes.</p>

No.	Notes
33	<p>An <b>All Employee Data</b> export should be performed from either SIMS.net or One, depending on which system holds the most recent and up to date information.</p> <p>When the export is taking place it is strongly advised that users in SIMS.net and One do not make any changes until this process has been completed. This is so that data synchronization is ensured.</p>
34	<p>It is not possible for One users to run an <b>All Employee Data</b> export if there is data held in the suspense processing screen.</p> <p>Users would need to process any data held in the <b>Suspense Processing</b> screen before running the export.</p>
35	<p>Addresses deleted in One will not be sent to SIMS.net. However, the current address is sent (based on business rules defined for current address).</p>
36	<p>Scenario: Employee data is exported from SIMS.net by two different bases. This data includes both ore identifiers with a message type of <b>No Change</b> and other data groups with a message type other than <b>No Change</b>.</p> <p>In this case the data from the latest base overwrites the existing data. However, both bases are visible in the <b>Suspense Processing</b> screen.</p> <p>Scenario: Employee data is exported from SIMS.net by two different bases. This data includes both ore identifiers with a message type other than <b>No Change</b> and other data groups with a message type other than <b>No Change</b>.</p> <p>In this case the latest base will overwrite the data. However, only the latest base is displayed in suspense.</p>
37	<p>In One if an <b>All Employee Data</b> routine is waiting to be imported it will not be possible to import any SIMS.net data until that routine has been imported.</p>
39	<p>If One rejects an unmatched employee and a rejection is received and accepted in SIMS.net then the service/scale/allowance is deleted for the employee.</p> <p>If SIMS.net rejects an unmatched employee and a rejection is received and accepted in One then the service/scale/allowance/<b>Employment Details/Payee Details</b> are deleted for the employee in One.</p>
39	<p>In <b>One   B2B:Personnel   Module Administration   Job Progress</b> users can view jobs from other transfers. Users should only be looking at B2B:Personnel specific jobs to view the status of them.</p>

## One Checklist

The Local Authority must ensure that:

- A licence has been purchased from Capita and the licence key has been entered to run B2B:Personnel. Once the licence has been entered you must log out of One to activate the licence.
- User rights are defined for the relevant B2B:Personnel tabs in System Administration.
- The schools have been activated for B2B:Personnel by checking the B2B:Personnel Base checkbox in the Bases tab.
- A user name and password has been created and given to the schools.
- The appropriate URL name of the web server has been given to schools. Note that this may be different from the B2B:Student URL.
- The field processing rules in both One and P7 have been defined to establish how incoming data should be processed.

## Appendix

- They understand the Change Status definitions of the data messages placed in One Suspense Processing.
- Personnel data has been synchronised between the Local Authority and schools. This involves ensuring that service terms, posts, scales and allowances are brought into alignment, based on an agreed set of prime data within the Local Authority.

**Note:** B2B will not be able to synchronise this data. One approach to synchronise the data would be for the schools to NOT convert any service data from their Personnel 5. In this situation, schools could then receive the service data that is held within One on their behalf by utilising the **All Employee Data** function within One.

- Data held in suspense is cleared before an upgrade.
- The SIMS Lookup Builder has been used to create and export simple lookup codes.
- They have clearly defined and synchronised the full set of simple and compound lookups to be used by both SIMS and One.
- Within One, start dates are entered for Personnel addresses. Otherwise, addresses will not be tracked as a change and therefore will not be sent to schools.
- Before running B2B:Personnel it is strongly advised that One users set the Parameter Value to F (False) for the parameter code BASE\_LINKS. This is set in **Tools | System Administration | LEA Defaults**.

This will prevent users from updating the **Service Term** and the **Base Name** for a service from other modules, which is not possible in One Personnel.

# 09 | Glossary

## Acceptable Data

Data in which the recipient has sufficient faith to accept without review.

## Auto-matching

Where One automatically matches data by comparing key fields.

## B2B

A generic term to indicate the relationship between two systems.

In Capita, the term refers to the transferring of student and employee data between the schools (SIMS) and Local Authorities (One).

In the future there may be other data transfer between these two systems and additional systems.

## B2B:Personnel

The software that allows employee data to be transferred between One and SIMS.net via Webserver.

## B2B People Match

This is the tab that allows you to match, add or reject any unmatched employees.

## Change

The **Change** status indicates that a change to the One data has been sent by the school. A change item may be accepted or rejected.

## Collection

A Collection is a group of related data items. For example, one or many instances of **Device**, **Telephone Number** and **Location** per employee.

## Comments

Attached to all data groups that have been rejected. Local Authority users are able to view these comments in the **Suspense** processing windows.

Entering a comment is mandatory when a rejection is made for a data group.

## Conflicts

Differences between incoming SIMS.net and current One data.

## Core Identifiers

The data group that holds the **Legal Surname**, **Legal Forename**, **Date of Birth**, **Gender** and **NI Number** data items. With the exception of **NI Number** these items are mandatory and are required in order to match an employee. These data items are transferred with each XML message.

## Data Groups

The group that data items belong to, e.g. **Core Identifiers**, **Basic Details**.

## Data Items

The attributes that are included in the data groups. For example, the data group **Core Identifiers** has the following data items: **Legal Surname**, **Legal Forename**, **Date of Birth**, **Gender** and **NI Number**.

## Delete

The **Delete** status indicates that the school has sent deleted values for all the data items in a data group. If all data items in a data group have not been deleted then a **Change** status message is sent instead.

A **Delete** item can be accepted or rejected

## One

Extended Management System. A Capita suite of modules aimed at Local Authorities.

## One Queue

A store of messages which need to be exported to a school. The One queue is also where the messages that have come from the school are stored before One picks them up for import.

## One Web Server

The One Web server is a computer running administrative software that controls access to the One/LEA network and its resources (such as databases etc.) and provides resources to computers functioning as workstations on the One/LEA network.

In the World Wide Web, web servers accept requests for information that are framed according to the Hyper Text Transfer Protocol. The server processes these requests and sends the requested document.

## GUID

Globally Unique Identifier, a 16-byte string that is guaranteed to be unique.

## HTTP/ HTTPS

Hypertext Transfer Protocol is used to carry requests from a browser to a Web server and to transport pages from Web servers back to the requesting browser. Although HTTP is almost universally used on the Web, it is not considered to be an especially secure protocol.

A set of formal rules describing how to transmit data, especially across a network.

## Inbound Queue

A table that holds changes sent by SIMS.net until the data held in the **Suspense Processing** or **B2B People Match** tabs has been processed.

## Manual Matching

The process of manually selecting the One record that an incoming record corresponds to. Used when One has not been able to match the incoming employee automatically.

## Message Types

**C** - Change, **RC** - Reject Change, **RRC** - Reject Reject Change, **D** - Delete, **RD** - Reject Delete, **RRD** - Reject Reject Delete, **NC** - No Change.

## No Change

A status indicating that there are no changes identified for this data group. Only seen on the Core Details tab. The core details are always included in XML messages regardless of whether there is a change, whereas all other tabs are only available where there are other data items in suspense.

## Outbound Queue

A table that temporarily holds any changes made to employee data. The data is held in this queue until a request to download this data is sent from SIMS.net.

## Ownership

A concept specific to data transfer, in which a field/record can be owned by either the school/LEA.

### Password

Located on the **B2B Settings** screen, this unique string of characters is supplied to the school by the LEA and must be entered before the school can connect to the One web server and transfer student data to the LEA.

### Rejected Change

If a school rejects a change sent to it by the LEA, the rejection message it sends back to the LEA will have a status of **Rejected Change**.

This data group can be accepted or rejected by One.

### Rejected Delete

If a school rejects a deletion sent to it by the LEA, the rejection message it sends back to the LEA will have a status of **Rejected Change**.

This data group can be accepted or rejected by One.

### Rejected Rejected Change

A message status used when a school insists that a deletion that has been rejected in One is correct.

An item with this status cannot be rejected again by **One** as the **Reject** button is disabled. The conflict must be resolved by another method or accepting the values sent by the school.

### Rejected Rejected Delete

A message status used when a school insists that a deletion that has been rejected in One is correct.

An item with this status cannot be rejected again by **One** as the **Reject** button is disabled. The conflict must be resolved by another method or accepting the values sent by the school.

### Rejection Message

An XML message from the recipient system indicating that it has received but not acted upon part or all of a data message.

### SSL

A network protocol that enables authenticated and encrypted communication between clients and servers. Secure Socket Layer (SSL) governs the transporting and routing of data over the Internet.

### SOAP

A protocol for exchanging XML based messages over a computer network, normally using HTTP.

### Suspense

The ability to temporarily hold data prior to either rejecting that data or using it to update the main system. Data in suspense is removed once it has been rejected or accepted.

Data can be held in suspense for one of two reasons:

- The incoming data is different to the data in the database.
- Field processing rules have been set up to put this specific data into suspense.

### Suspense Processing

Function set which allows manual processing of employee data to resolve conflicts.

### **Unmatched**

Where One has not been able to automatically match an incoming employee.

### **URL**

An Internet address. In this context, refers to the address of the **One** web server resource available on the Internet.

### **User Name**

Located on the **B2B Settings** screen, this item is supplied to the school by the LEA and must be entered before the school can connect to the One web server and the student data successfully transferred to LEA.

### **XML**

The eXtensible Markup Language. Used to structure, store and transport information.

### **XML ID (Error Log)**

The XML ID is provided for One (Export) and SIMS.net (Import) so that users can identify a particular XML message. This is useful when trying to resolve problems which cannot be rectified within the B2B:Personnel procedure.

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