



# One B2B Student and SIMS Primary

last updated for the Summer 2019 release

Handbook

**CAPITA**

## Revision History

Version	Published on
Summer 2019 (3.69) - 1.0	21/06/2019

### Doc Ref

One B2B Student and SIMS Primary Handbook/Summer 2019 (3.69)/21-06-2019

© Capita Business Services Ltd 2019. All rights reserved. No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated or transmitted without the express written consent of the publisher. Microsoft® and Windows® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

[www.capita-one.co.uk](http://www.capita-one.co.uk)

### Contacting One Application Support

You can log a call with One Application Support via the Customer Service tool available on [My Account](#).

### Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

[onepublications@capita.co.uk](mailto:onepublications@capita.co.uk)

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

# Contents

<b>01   Document Change Control .....</b>	<b>1</b>
<b>02   SIMS Primary and One B2B:Student .....</b>	<b>3</b>
Introduction .....	3
Process Overview .....	3
Pre-requisites .....	4
Process Detail .....	4
Step 1 Creating a B2B tile .....	4
Step 2 Creating a SIMS Primary Attendance Changed Data scheduled task.....	4
Step 3 Approving school use of B2B service.....	5
Step 4 Retrieving security tokens .....	5
Step 5 Migrating a base as SIMS Primary in One Education .....	5
Step 6 Verifying Base migration .....	7
<b>03   Frequently Asked Questions.....</b>	<b>9</b>
Is the data transferred the same as for SIMS7? .....	9
Do I need to run a snapshot task after migration? .....	9
How do schools access their scheduled tasks? .....	10
<b>Index .....</b>	<b>15</b>
<b>Index .....</b>	<b>16</b>

# 01 | Document Change Control

Date	Release	Description
Summer 2019	3.69	<p>Document updated and improved to make it more relevant to latest releases.</p> <p>There is a new process flow diagram.</p> <p>See <a href="#">Process Overview</a> on page 3</p> <p>A new section has been added detailing the process of migration.</p> <p>See <a href="#">Process Detail</a> on page 4</p> <p>Post Migration has become Frequently Asked Questions.</p> <p>See <a href="#">Frequently Asked Questions</a> on page 9</p>



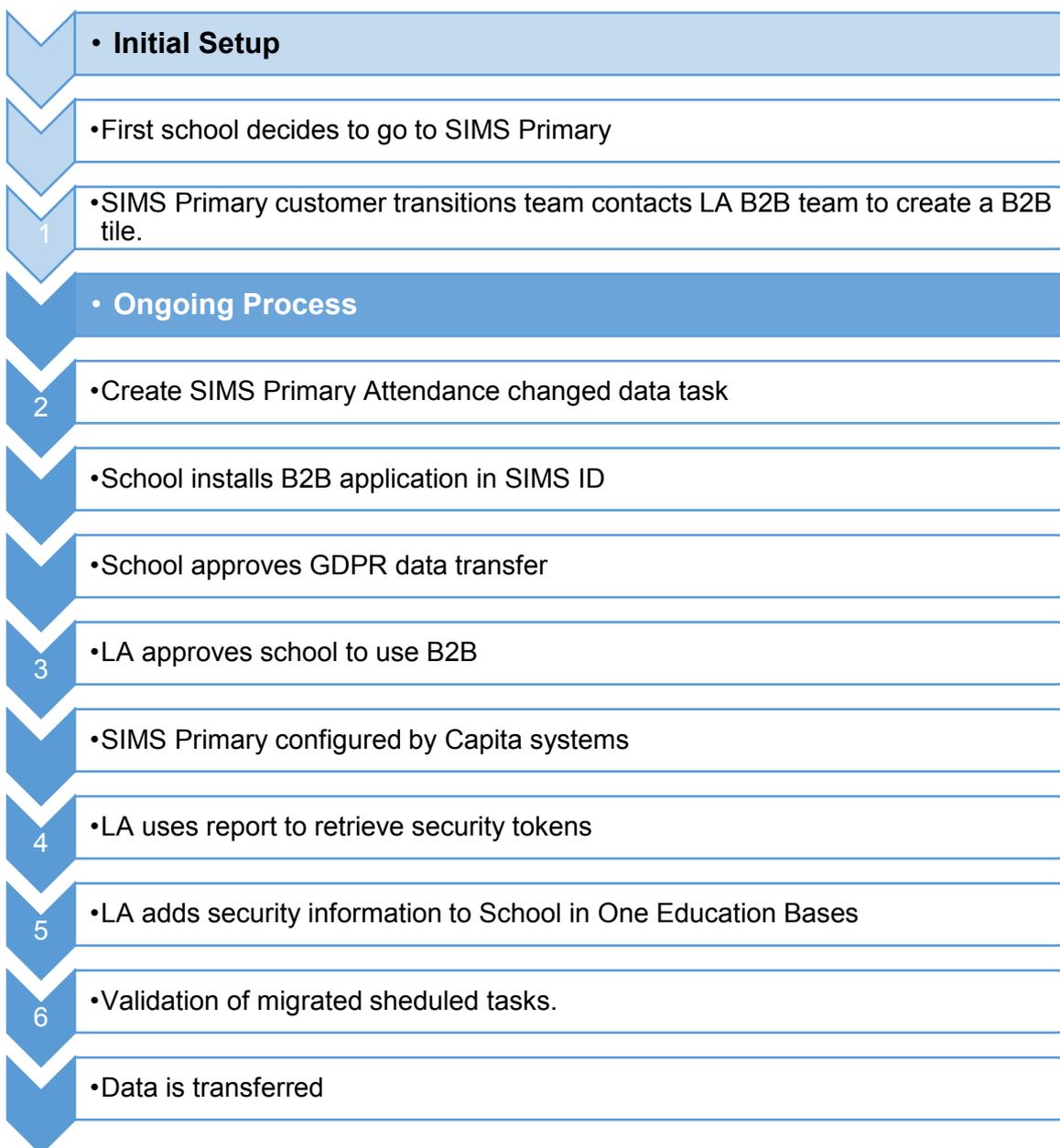
# 02 | SIMS Primary and One B2B:Student

## Introduction

From the One Spring 2018 Release (3.65), One B2B:Student is compatible with SIMS Primary. This handbook contains information on how to configure One B2B:Student to exchange data with SIMS Primary.

## Process Overview

Steps requiring Local Authority input are numbered and detailed in the sections below.



## Pre-requisites

- School using SIMS Primary.
- One Education Spring 2018 Release (3.65) or later.
- The B2B scheduler service is installed. This will be completed by One Technical when updating the web server.
- Existing scheduled tasks have been migrated to Phase 3 scheduled tasks – Before migrating a base to SIMS Primary, all scheduled tasks should be migrated to Phase 3. If this is not undertaken, there will be no scheduled tasks set up for use. For more information on migrating scheduled tasks to Phase 3, refer to the Migrating B2B:Student Scheduled Tasks topic in the Managing B2B:Student handbook, available from the SIMS documentation centre. *(For clarity Phase 3 scheduled tasks is where the tasks are created in One Education and actioned by SIMS Services Manager, SSM)*
- Attendance Changed Data scheduled task – Creating this before migrating the base in One Education ensures attendance data collection continues after the migration to SIMS Primary. For more information to why this is needed see the section below.

## Process Detail

### Step 1 Creating a B2B tile

Before any schools migrate to SIMS primary a B2B tile will need to be created and updated in the SIMS ID Store. This will enable schools to select the B2B service to continue sending data to the LA.

The SIMS Primary customer transition team will contact the LA regarding the creation of the tile and for the LA to supply a nominated person to manage the SIMSID account. In preparation for this the LA should make sure they have the following documents in a web consumable format.

- Local Authority Data Protection Impact Assessment, DPIA.
- Local Authority Privacy statement.
- Contact details for the team(s) supporting B2B.

### Step 2 Creating a SIMS Primary Attendance Changed Data scheduled task

As B2B Student will only be able to collect Attendance Changed Data, all attendance related scheduled tasks from SIMS 7 will be made inactive after migration. It is strongly recommended that before migrating a base to SIMS Primary, a SIMS Primary Attendance Changed Data scheduled task is created. Creating this scheduled task before migration will ensure that attendance data collection continues automatically after migration.

Additionally, current functionality allows grouping of bases linked to a task. As it is not possible to group SIMS 7 and SIMS Primary bases together against a task, creating the attendance task before migrating the base to SIMS Primary enables these bases to re-group. If the attendance task is created post-migration, each base might need manual updating each time a change is required.

To create a SIMS Primary Attendance Change Data scheduled task:

1. Log into v4 Online and click the **B2B:Student** button.
2. Select the **Scheduled Tasks** page.
3. Search for the required base and open it.

4. Click the **Add New Task** button.
5. Enter a **Task Name**.
6. Select a **Transfer Type** of **Export from School**.

7. Select **Attendance Data** from the **Data Filter Details** drop-down.
8. Select **Attendance Changed Data (SIMS Primary)**.
9. Click the **Save** button.

### Step 3 Approving school use of B2B service

Please refer to <https://id.sims.co.uk/support/wiki/107> for the current approval process in SIMSID Integrator.

### Step 4 Retrieving security tokens

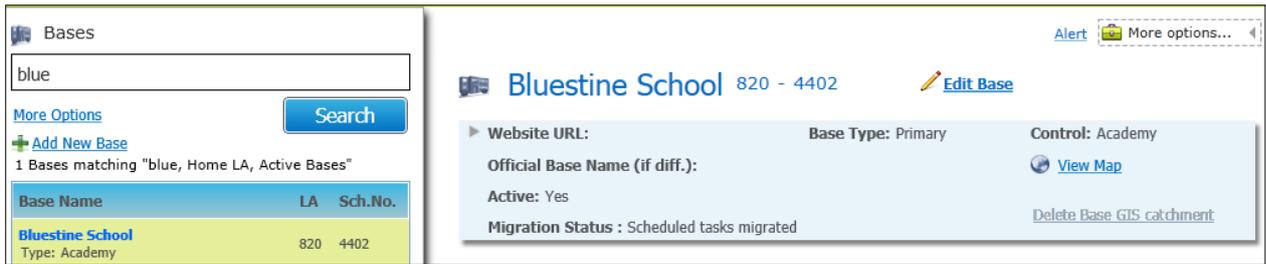
Please refer to <https://id.sims.co.uk/support/wiki/107> for details of how to run reports to obtain this information in SIMSID Integrator.

### Step 5 Migrating a base as SIMS Primary in One Education

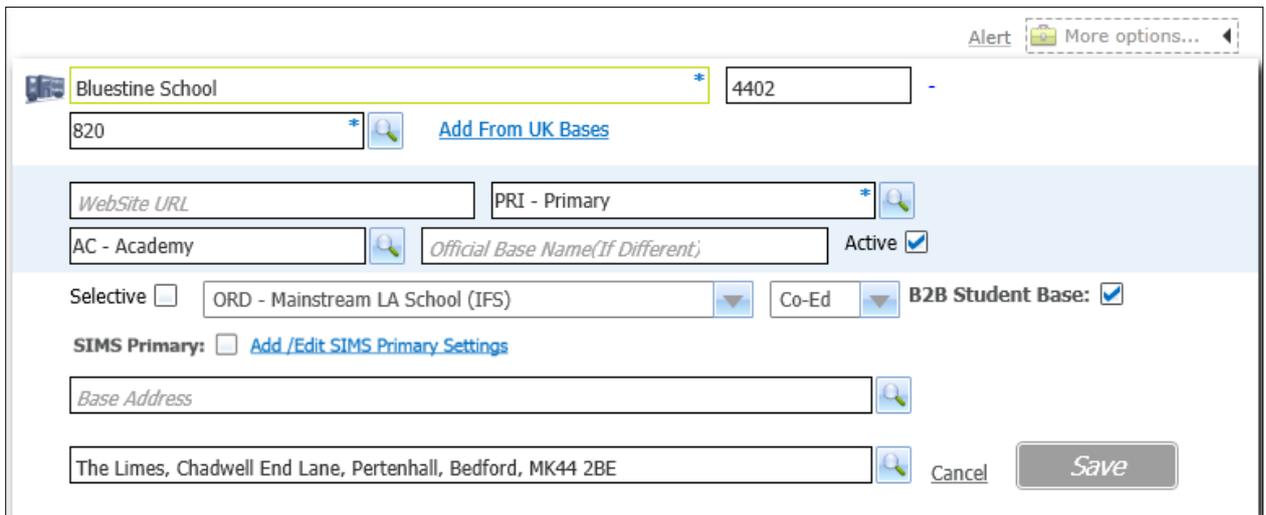
After a school has migrated from SIMS 7 to SIMS Primary, the LA will have access to the SIMSID Technical Integrator site where they will be able to run a report to obtain the security tokens as detailed in the link in step 3 above. These are the **Client ID**, **Secret**, **Subscription Key**, and **Organisation ID**.

To migrate a Base to use B2B for SIMS Primary follow the steps below.

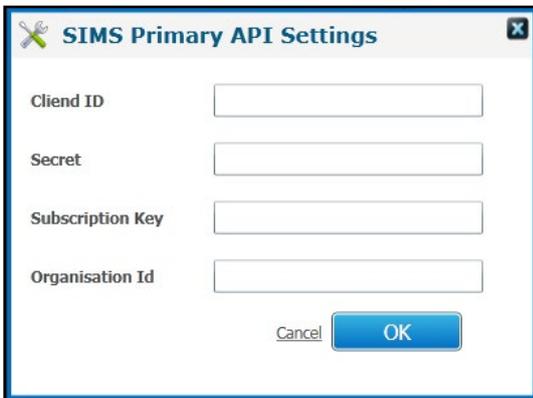
1. Log into v4 Online and click the **Bases** button.
2. Search for and open the base you want to migrate to SIMS Primary.



3. Click the **Edit Base** hyperlink.

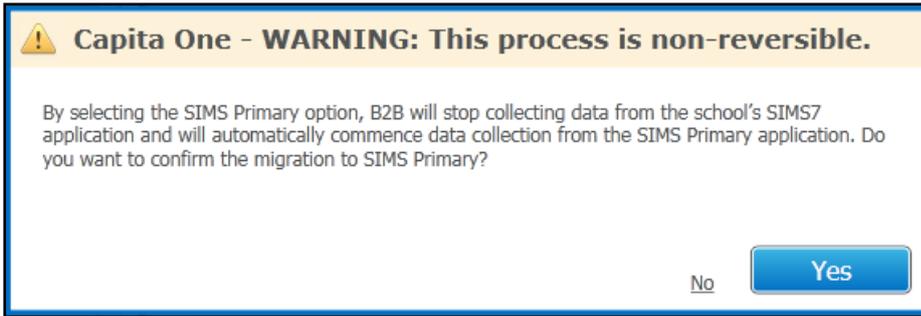


4. Click the **Add/Edit SIMS Primary Settings** hyperlink to display the **SIMS Primary API Settings** dialog.



5. Enter the settings supplied by the report from the SIMSID Integrator Service. You must enter all values.
6. Click the **OK** button to close the dialog.
7. Select the **SIMS Primary** check box to display a confirmation dialog.

**WARNING!:** Changing a base to a SIMS Primary base is irreversible. However, you can edit the SIMS Primary connection settings later if required.



8. Click the **Yes** button to finish migrating the base to a SIMS Primary base.
9. At this point we strongly advise that a Snapshot task is run to ensure that no data changes between the last changed data task and the migration are missed.
10. Ensure schools have access to the school's portal so they can access their scheduled tasks.

## Step 6 Verifying Base migration

After performing a Base migration, you should verify that the migration has completed. To check if a base is now a SIMS Primary base:

1. Log into v4 Online and click the **B2B:Student** button.
2. Select the **Scheduled Tasks** page.
3. Search for the base you have migrated. If the base has migrated successfully, a cloud icon is visible next to the base name.

60 Bases		Task Count: 8				
All	Base	Tasks	Queued	Base Name	Scheduled Task Name	Data Flow
<input type="checkbox"/>	<b>A4</b> Queued : 2   Pending : 0	2	<input checked="" type="checkbox"/>	aischool-11	u3	Export
<input type="checkbox"/>	<b>Anipri3</b> Queued : 49   Pending : 0	49	<input checked="" type="checkbox"/>	aischool-11	snap	Export
<input type="checkbox"/>	<b>anishoo-7</b> Queued : 7   Pending : 4	11	<input checked="" type="checkbox"/>	aischool-11	1_SP	Export
<input type="checkbox"/>	<b>anishoo-7</b> Queued : 7   Pending : 4	11	<input checked="" type="checkbox"/>	aischool-11	user2	Export
<input checked="" type="checkbox"/>	<b>anishoo-11</b> Queued : 8   Pending : 0	8	<input checked="" type="checkbox"/>	aischool-11	user1	Export
<input type="checkbox"/>	<b>anishoo-12</b> Queued : 5   Pending : 0	5	<input checked="" type="checkbox"/>	aischool-11	w1	Export
<input type="checkbox"/>	<b>anishoo-12</b> Queued : 5   Pending : 0	5	<input checked="" type="checkbox"/>	aischool-11	acds	Export
<input type="checkbox"/>			<input checked="" type="checkbox"/>	aischool-11	Jons Group Snapshot NCY	Export



## 03 | Frequently Asked Questions

### Is the data transferred the same as for SIMS7?

The data blocks transferred from SIMS Primary are the same as those transferred from SIMS7 and contain the same fields. However, due to how the SIMS API operates, where a change has been made to a data item, the whole data group is collected (e.g. All SEN Needs, not just changes). To mitigate this, data will only be considered for importing where it does not match what already exists in One.

### Do I need to run a snapshot task after migration?

We strongly recommend that a Snapshot task is run to ensure that no data changes between the last changed data task and the migration are missed.

Change tracking has been improved in SIMS Primary and it is not possible to migrate change tracking data. Therefore, after a migration, the change tracking data is lost and reset, the date of the migration is used as the data changed date. When using a changed data task the system will look at changes since the last successful task. B2B: SIMS Primary will also use the migration date as the last successful task date, so only data changed since migration will be sent. There is a risk that data may have changed between the last SIMS7 B2B task and that data will not be collected. NB it is assumed that the time between migration and the first data transfer is less than 3 months, data older than 3 months will not be transferred.

LA's may also wish to use a snapshot task to test the data transfer connection is fully working rather than wait for the first changed data task. From the summer 2019 (3.69) release of One Education the values in the "Hash Cache" will be maintained and any data blocks that do not contain any changed data will be trapped by the cache and not sent for processing, reducing the volume of data to be processed.

### Will I need to setup new scheduled tasks?

If a Phase 3 scheduled task existed in One Education before migrating the base to SIMS Primary, then existing snapshot and changed data tasks will continue to work.

New Attendance changed data tasks need to be created to collect attendance data. We recommend setting these up prior to migration as it is not possible to setup tasks in groups that include SIMS 7 and SIMS Primary schools. The new tasks will only collect attendance marks that have changed from SIMS Primary, this significantly reduces the data transferred between systems so there is no need for absence only tasks. The marks will be inserted in the string held in the DX\_XML\_Attend table, there will be no need to update attendance reports.

NB All attainment, two way and SIMS 7 attendance scheduled tasks will be made inactive. This functionality is not currently supported in B2B SIMS Primary.

## How do I access information about connection errors etc?

You can view the task log for any SIMS Primary task. The log includes information about errors and exceptions that occurred while importing a specific file, which can be useful when troubleshooting an import issue. To view the task log:

1. Log into v4 Online and click the **B2B:Student** button.
2. Select the **Scheduled Tasks** page.
3. Search for the required base and open it.
4. Select the **Task Log** tab to display the entries for the base.

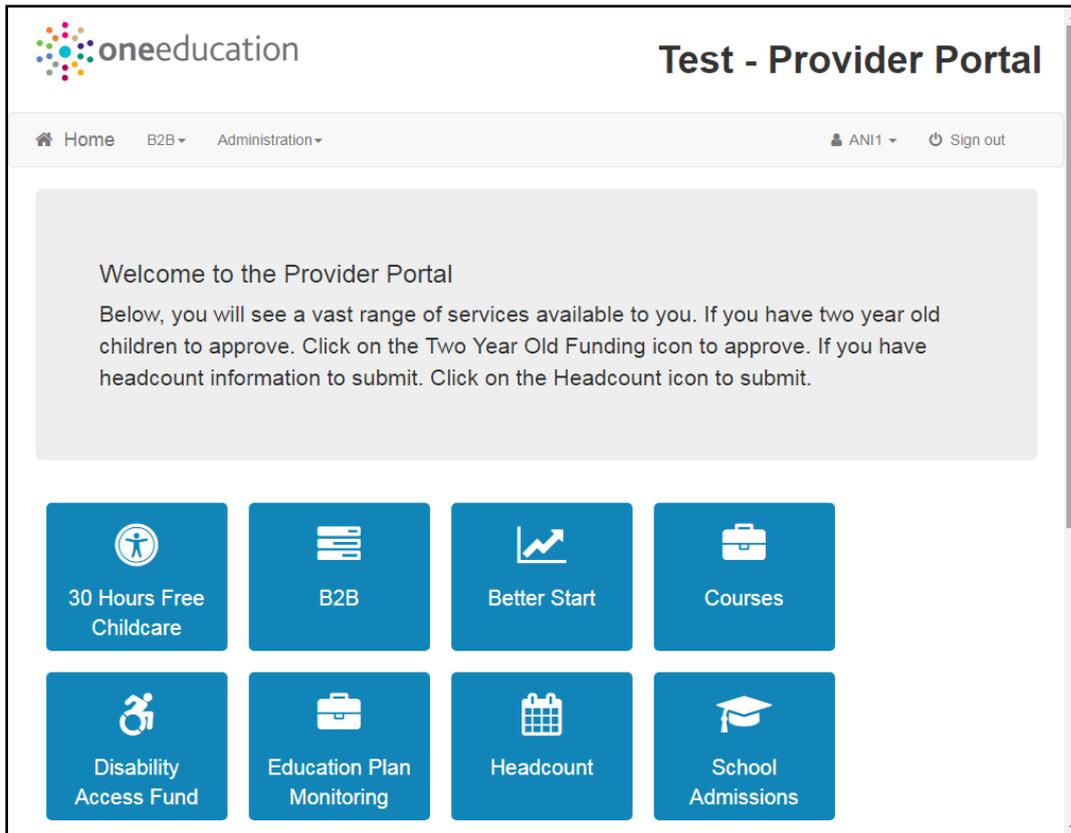
Scheduled Task		Task Log			
Filters <input type="text" value="Task Name"/> <input type="text" value="Cohort"/> <input type="text" value="Data Type"/> <input type="text" value="Status"/>					
Task Count: 69					
Base Name	File Name	Scheduled Task Name	Date Logged	Status	Exception Details
Anipri3	8201079_CES_820LLLL_005.xml	<a href="#">Scheduled</a>	01/03/2018 16:13:43	Successfully Exported	No Exceptions
Anipri3	8201079_CES_820LLLL_006.xml	<a href="#">Scheduled Task</a>	01/03/2018 16:13:45	Successfully Exported	No Exceptions
Anipri3	8201079_CES_820LLLL_007.xml	<a href="#">Scheduled Task</a>	01/03/2018 16:13:47	Successfully Exported	No Exceptions
Anipri3	8201079_CES_820LLLL_010.xml	<a href="#">Scheduled Task</a>	01/03/2018 16:13:49	Successfully Exported	No Exceptions
Anipri3	8201079_CES_820LLLL_008.xml	<a href="#">Changed</a>	01/03/2018 16:13:50	Successfully Exported	No Exceptions

## How do schools access their scheduled tasks?

After migrating, B2B scheduled tasks are still maintained via the School Portal. However, some data options will change after migration to match the changes within V4 Online. Additionally, the ability to lock down a task for school use only has moved from within SIMS to the School Portal.

**IMPORTANT NOTE:** After migration, the School Portal link is no longer usable from within SIMS. It should be ensured that schools have the required URL and login details for the School Portal.

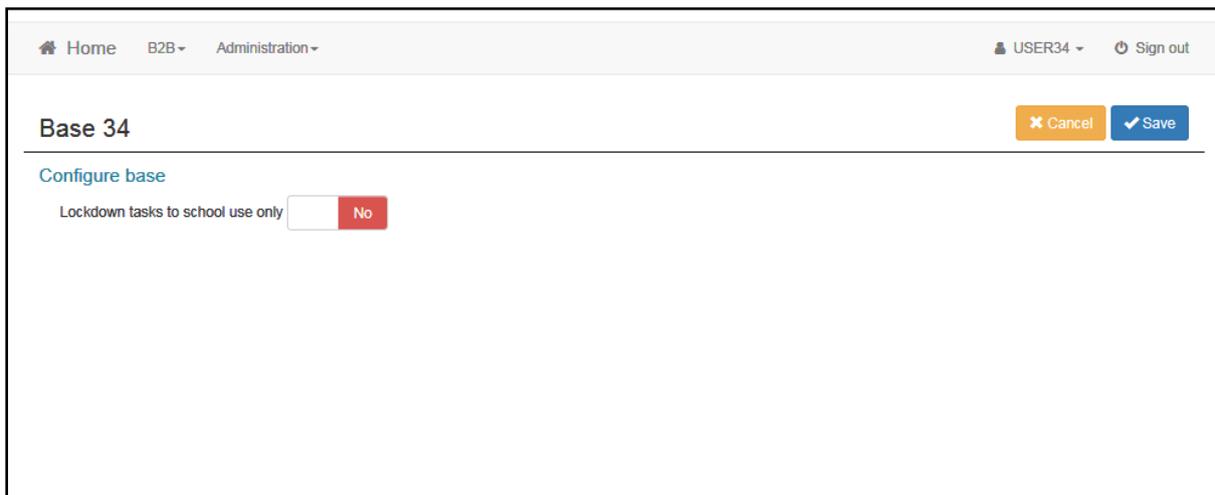
1. Log on to the School Portal.
2. Click the **B2B** tile to display your scheduled tasks.



The ability for a school to lock down all scheduled tasks at once has moved to the B2B:Student School Portal. Formerly, it was accessed via SIMS. If the tasks were locked down before the migration, they will continue to be locked down after the migration. The existing ability to lock down individual scheduled tasks remains unchanged after migration.

To lock down all scheduled tasks:

1. Click the **Configure** button to display the **Configure base** page.
2. Click the **Lockdown tasks to school use only** toggle to display **Yes**.



After a base is migrated to SIMS Primary, the school can continue to manage scheduled tasks via the B2B:Student School Portal. The scheduling options have remained the same for **Snapshot** and **Changed Data**. However, after migration to SIMS Primary, the only option in the **Attendance data** section is the **All Attendance Changed Data**.

## Frequently Asked Questions

Home B2B Administration

New task Owned by school

Task details Scheduler settings

Task name Task name Active

Transfer details

Export from school

Data type

Attendance Data

Attendance data

All Attendance Changed Data

Data filter details

NCY

All

Curriculum Year N2  Curriculum Year R  Curriculum Year 1

Curriculum Year 5





# Index

Document Change Control.....	1
Migrating a Base .....	5
Verification .....	7
Overview .....	3
Post Migration	
Snapshot.....	9
Pre-requisites .....	4
Scheduled Task .....	4

## Index

Document Change Control.....	1
Migrating a Base .....	5
Verification .....	7
Overview .....	3
Post Migration	
Snapshot.....	9
Pre-requisites .....	4
Scheduled Task .....	4