



# B2B Open

last updated for the Summer 2020 (3.72) release

Handbook

**CAPITA**

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# 01 | Document Change Control

Date	Release	Description
Summer 2020	3.72	File import and processing in v4 online will now include all reasons for an exclusion when importing. Files generated through 3 <sup>rd</sup> party suppliers and sent through B2B Open will now include multiple exclusion reasons.
May 2019	3.69	Document updated and improved to make it more relevant to latest releases.



# 02 | Overview

## Introduction

B2B Open v4.0 is designed for school MIS suppliers to enable the:

- Export of data via B2B:Student to multiple local authorities (LA).
- Export of data via B2B:Personnel.
- Import of data via B2B:Personnel.

B2B Open performs the following tasks:

- It enables the user to specify parameters that are required by B2B Open, these are shared by B2B:Student and B2B:Personnel and are set up and defined in One, i.e. User Name, Password, URL.
- Performs on-demand connectivity test to the One environment; enabling users to check if a connection to One can be made. If no connection is made, appropriate error messages are displayed i.e. 'User Name or Password is invalid'.
- For B2B:Student it enables users to send updated files to One at multiple Local Authorities, either on demand (immediately), or at a scheduled day and time.
- For B2B:Personnel it enables users to send updates and receive updated files from One, either on demand, or at a scheduled day and time.
- For B2B:Student it enables users to define LA level settings to perform Multi-Source exports.

Since B2B Open incorporates its own scheduler it must run all the time, especially if the scheduled tasks have been defined.

## Licensing

In order for an LA to receive data via B2B:Open, they must have the appropriate licence for each school from which they wish to receive data. If schools are sending data to their current LA (i.e. the LA has the same LA number as the school or schools from which data is collected), then the LA requires a standard B2B:Open licence. However, if schools are exporting data to LAs with a different LA number than the school, the receiving LA must have a B2B:Open Out of County licence. The LA requires only one Out of County licence and does not need a licence per each out of county school.

## Export Process

When a B2B:Student or B2B:Personnel export is initiated, either manually or via the scheduled task, any files in the **Files Not Exported** directory are picked up by B2B:Open and sent to the designated Local Authorities for processing in One.

## Import Process

When B2B:Personnel files are imported from the Local Authority either manually or via the scheduled task, they are placed in the **Files Imported** directory.

## Validations

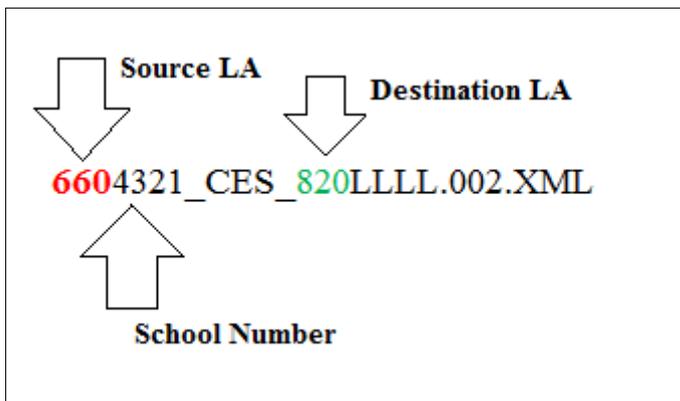
One B2B Open v4.0 performs three types of validations to help ensure data is successfully transferred.

- **XSD schema validation** - Before a file is exported to the One database, the B2B Open application performs an XSD validation. If validation fails, then an error indicating the specific node is displayed.

**NOTE:** For the One Summer 2016 Release (3.60), the export is still completed and processed by One, even if an XSD schema validation error occurs. From the One Spring 2017 Release (3.62), files with a schema error will be rejected. The following is the full error message:

*This file has failed schema validation. Please check the latest version of the schema on our One Publications website. This file will be processed where possible, but from Spring 2017 release files not matching the schema will be rejected.*

- **File name validation** - The files in the export folder must include the source LA number, source school number and the destination LA number. The export process checks that the source LA, source school and destination LA number in the filename match the values defined in the file itself. If these naming conventions are not followed, then B2B:Open does not export the file and displays an error message.



**NOTE:** CES and LLLL are static values.

- **Destination LA URL validation** - The destination LA's URL (as defined within the **Administration** tab) must be valid and valid credentials must be entered. School specific credentials for exporting data can be defined for each school listed in the **B2B Student** tab.

## Upgrading from B2B Open v3.0

When B2B Open v4.0 is installed, the following information that is defined for the folder locations in B2B Open v3.0 will be copied over for the following within the School Information tab:

- Files not Exported
- Files Exported

**NOTE:** The Files not Exported and Files Exported folder details are maintained when migrating from v3 to v4. However, due to the new way that B2B:Open handles exports, these details are overwritten once the **Root Folder** has been defined via the **Administration** tab.

- User Name
- Password

## Password requirements

From the One Autumn 2016 Release (3.61), B2B:Open supports the latest Capita One password strength requirements

The One software now requires that all user passwords, including those for the accounts used to transfer data via B2B Open, conform to the following strength requirements:

- Must contain between 10 and 128 characters.
- Must contain one uppercase, one lowercase, one numeric and one special character.
- Must not be the same as the username.
- New password cannot be the same as the previous 10 passwords.
- New password cannot numerically increment the existing password, e.g. if the existing password is Lack!ngEnt0py32, the new password cannot be Lack!ngEnt0py33.

The passwords currently entered in B2B Open will continue to work, even if they do not conform to the above requirements, until the password is changed at the LA, either because of an automatic password expiry or because the LA decides to manually change the password to meet the new requirements.

## Downloadable installers

The B2B Open installers are available for download as a password protected exe file. The password required to unzip the files will be emailed to the designated One Coordinator for each LA on release day.

The installation file can also be downloaded from the [My Account](#) notification for each release.

# 03 | Installing B2B Open v4.0

## Prerequisites

B2B Open requires the following:

- Microsoft.net runtime environment 4.5.
- Internet access
- B2B: Student and B2B: Personnel require access to the one web server.
- The Local Authorities to which data is being sent must be running the One Summer 2016 Release (3.60) or later.

## Installation

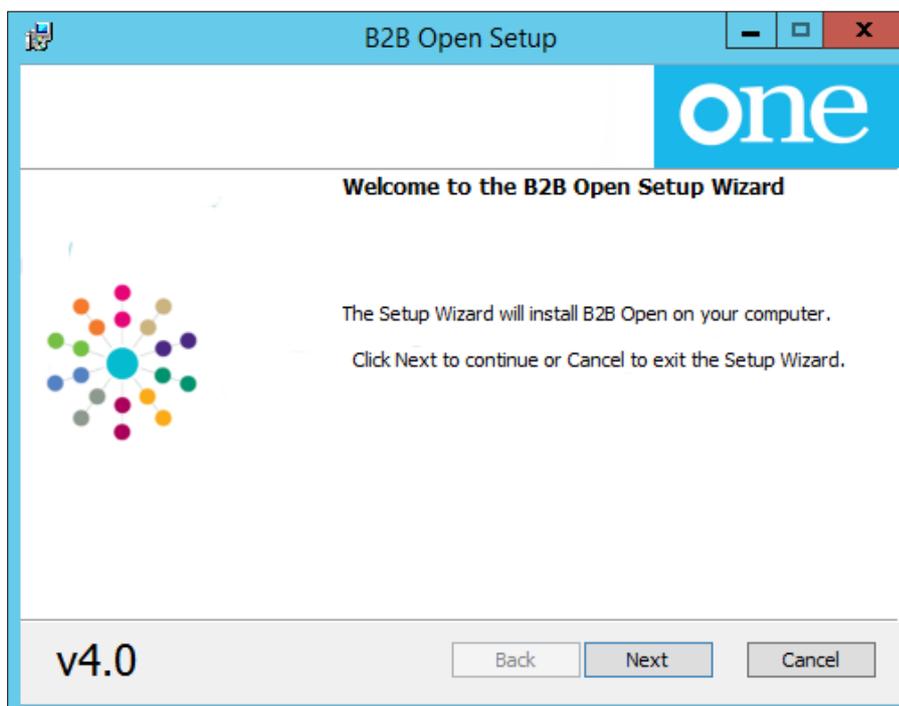
Once LAs are licenced for B2B Open v4.0, they will be provided with a zip file to enable them to install the software.

**IMPORTANT NOTE:** B2B Open v4.0 cannot be downgraded back to v3.0. However, if you must downgrade to v3.0, you can uninstall v4 and delete the local database, located by default in the following location:

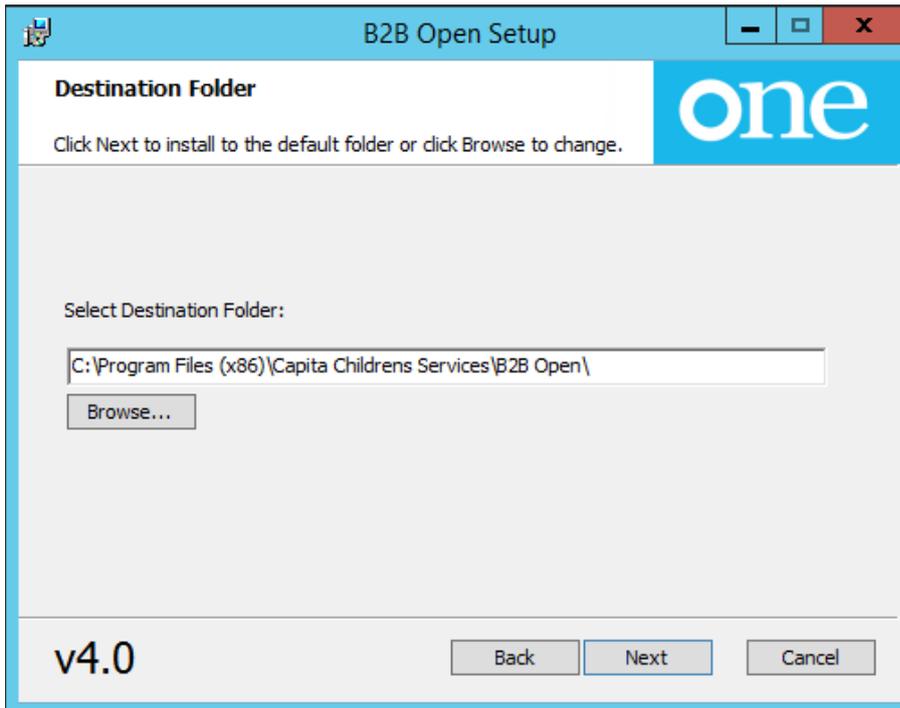
C:\ProgramData\Capita\B2BOpen

To install the software, complete the following task:

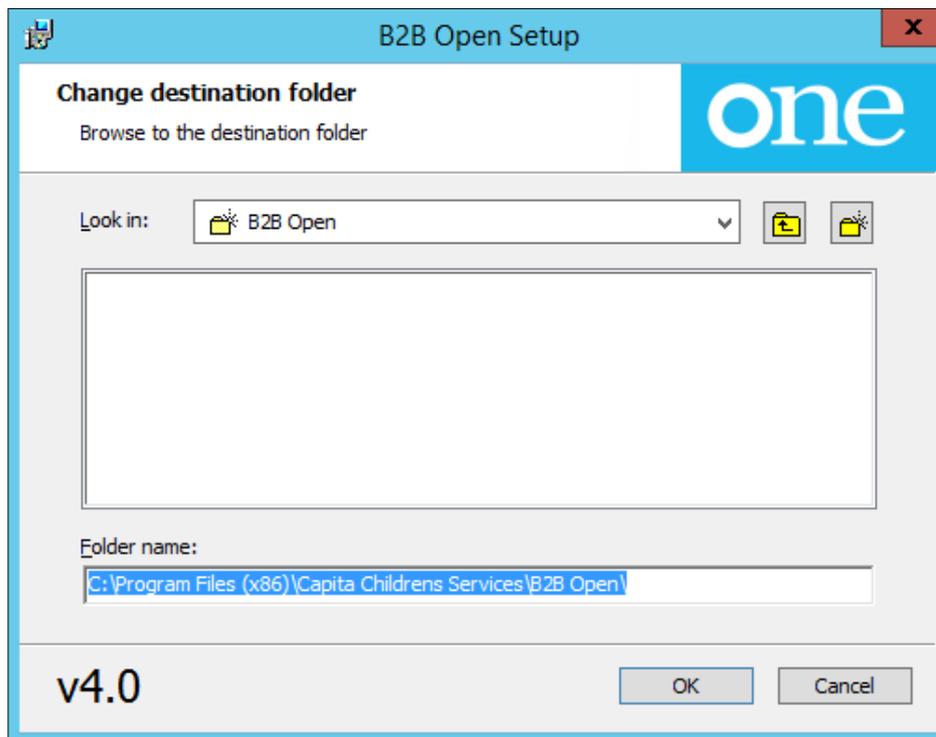
1. Save the B2B Open V4 Setup.zip file to your local machine and extract it.
2. In the B2B Open V4 Setup folder, double-click the B2BOpen.Setup installer to display the first page of the **B2B Open Setup** wizard.



3. Click the Next button to display the **Destination Folder** page.

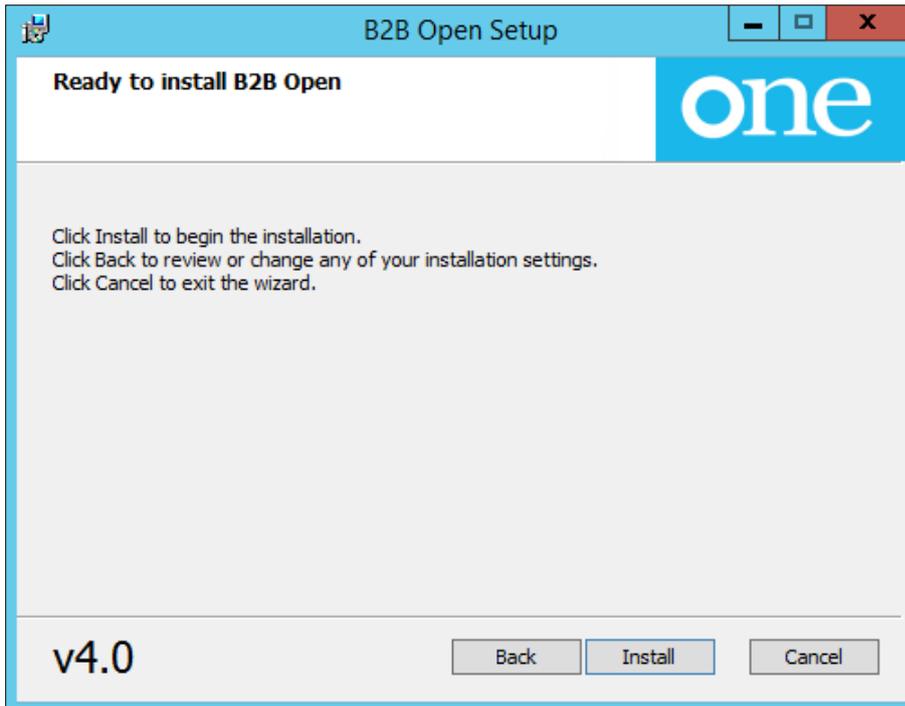


4. If required, select a different destination folder.
  - a. Click the Browse button to display the **Change destination folder** dialog.

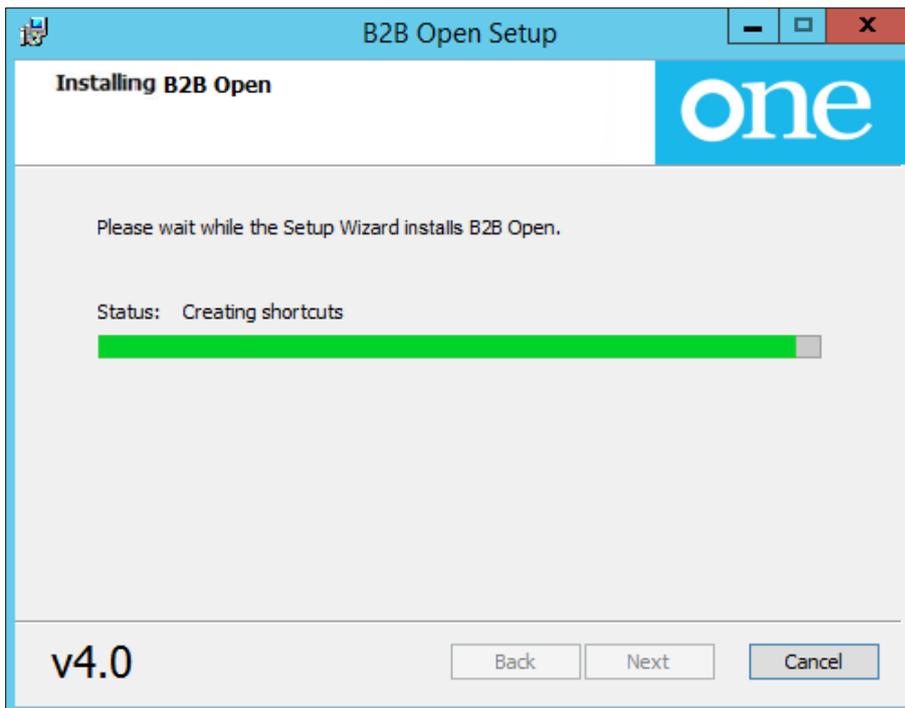


- b. Use the **Look In** drop-down to navigate to the location to which you want to install the B2B Open application.
  - c. Select the required folder then click the **OK** button to return to the installation wizard.
5. Click the **Next** button to display the **Ready to install B2B Open** page.

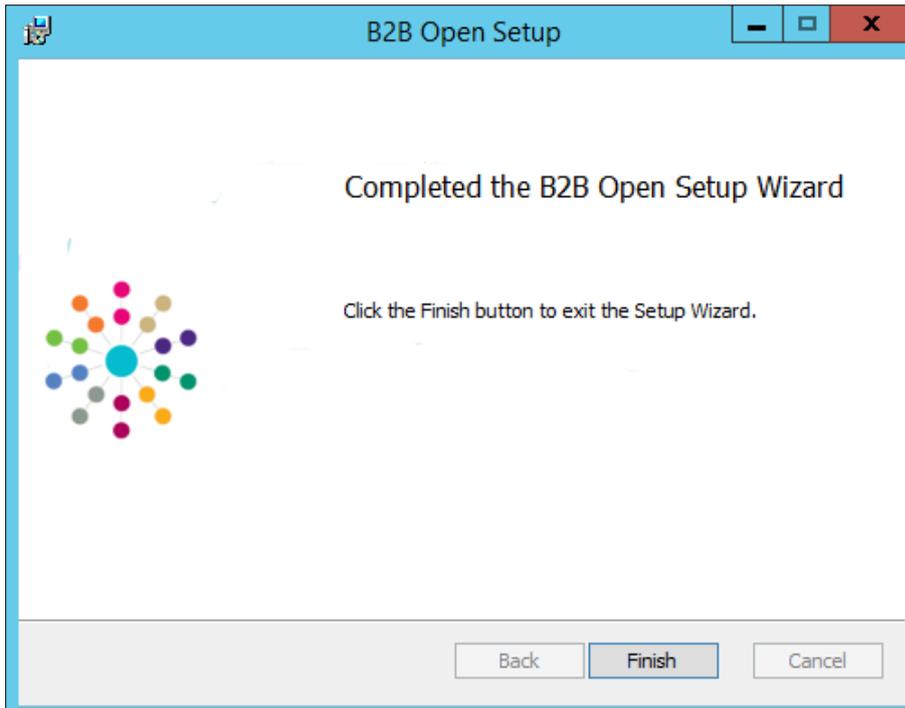
*Installing B2B Open v4.0*



- 6. Click **Install** to start installation process.



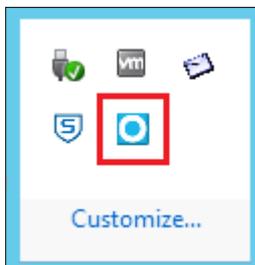
Once the installation has been completed successfully then the following window is displayed.



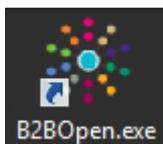
7. Click the **Finish** button to exit the **B2B Open Setup** wizard.

## Opening B2B Open

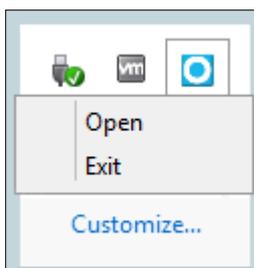
Once initiated, B2B Open is accessed from the icon tray in the Task Bar.



1. Double click the B2BOpen.exe icon from the desktop.



2. Open the icon tray and right-click on the B2B Open icon. Then select **Open** to display the application.



**School Details**

School Name	LA No.	Dest. LA No.	School No.
Green Abbey B2BO	820	820	4321

**Logs**

LA No.  School No.  Refresh Logs

Date	Level	LA No.	Dest. LA No.	School No.	Message
24/04/2019 1...	INFO	820	820	4321	Test Connection Successful.
24/04/2019 1...	INFO	820	820	4321	Step 5. Ping succeeded for B2B service
24/04/2019 1...	INFO	820	820	4321	Step 4. Logged in to the server
24/04/2019 1...	INFO	820	820	4321	Step 3. Pinged to the Data Transfer s...
24/04/2019 1...	INFO	820	820	4321	Step 2. Service opened
24/04/2019 1...	INFO	820	820	4321	Step 1. Endpoint configuration (IServi...
24/04/2019 1...	INFO	820	820	4321	Testing Connection:

**Schedule Task Settings**

Sunday  
 Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday

Executes at  Hours  Minutes

Security protocol type

Use Proxy Proxy Name  Proxy User Name  Proxy Password

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# 04 | General Configuration

## Introduction

The proxy and scheduled task settings within B2B Open are shared for B2B Student and B2B:Personnel.

## Migrating Settings from B2B Open v3.0

The following settings are migrated automatically when updating from B2B Open v3.0 to v4.0 and do not need to be entered again:

- Proxy settings
- Scheduled task settings
- Folder settings
  - Files not Exported
  - Files Exported

**NOTE:** The Files not Exported and Files Exported folder details are maintained when migrating from v3 to v4. However, due to the new way that B2B:Open handles exports, these details are overwritten once the **Root Folder** has been defined via the **Administration** tab.

- User Name
- Password

## Entering Proxy Settings

You can configure B2B Open to use a proxy if your local network settings require you to do so. To configure B2B Open to use a proxy, you must enter the **Proxy Settings** section then click the **Save** button.

Proxy Settings			
<input type="checkbox"/> Use Proxy	Proxy Name <input style="width: 150px;" type="text"/>	Proxy User Name <input style="width: 150px;" type="text"/>	Proxy Password <input style="width: 100px;" type="password"/>

- **Use Proxy:** Select this check box if the school connects to the internet through a proxy. If selected, all the other proxy fields must also be populated.
- **Proxy Name:** This is either the physical name or the IP address of the school's proxy server.
- **Proxy User Name:** Either the proxy server administrator's user name or the name of a specific user created for the B2B Open v4.0 application.

**NOTE:** It is possible to enter the name of any proxy user that has sufficient permissions into the **Proxy User Name** field. However, if the specified user has their access through the proxy server removed, then B2B:Open stops posting files to the web server.

- **Proxy Password:** The password for the proxy user account specified in the **Proxy User Name** field.

## Configuring Scheduled Task Settings

The **Schedule Task Settings** area is used to define on what days and at what times the B2B Open scheduled task should run. When configured, if there B2B:Student or B2B:Personnel files to be exported to the LA, they are exported at the times defined in the panel. If there are B2B:Personnel files to be imported from the LA, they are imported at the same time. The schedule applies to all tasks; B2B:Student and B2B:Personnel tasks cannot be scheduled for different times nor can different times be assigned for each local authority (if you are sending data to multiple local authorities).

**Schedule Task Settings**

Sunday  
 Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday

Executes at:    
Hours Minutes

To set the day and time for the scheduled task to run:

1. Select the check boxes for the day(s) you want the scheduled task to run.
2. Enter an **Hours** and **Minutes** value in the **Executes at** field.
3. Click the **Save** button.

## Entering the Root Folder

The B2B Open root folder is the directory in which B2B Open creates the **Files Not Exported** and **Files Exported** directories. When an export is run, either manually or automatically, all the files in the **Files Not Exported** directory are sent to the destination local authorities. Once the export is completed, the files are moved automatically to the **Files Exported** directory. Before adding any local authority details, the root folder must be selected.

When an import is run for B2B:Personnel, either manually or automatically, the files are placed in the **Files Imported** directory

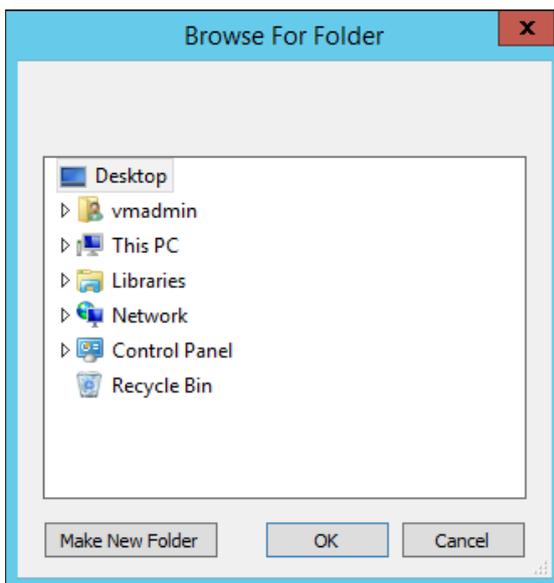
**NOTE:** If you change the root folder location, then B2B Open automatically recreates the folder structure based on the number of the LA defined within the **Administration** tab. The files are not copied to the new location.

To designate the root folder:

1. Select the **Administration** tab.



2. In the **Root Folder** panel, click the folder icon to display the **Browse For Folder** dialog.
3. Either select an existing folder or create a new folder.



4. Click the **OK** button to close the dialog.
5. Click the **Save** button to record the root folder location. If you have previously set a location and are changing it, you are warned that a new file structure will be created but existing export files will not be copied into the new root folder.

## Entering LA URLs for B2B:Student

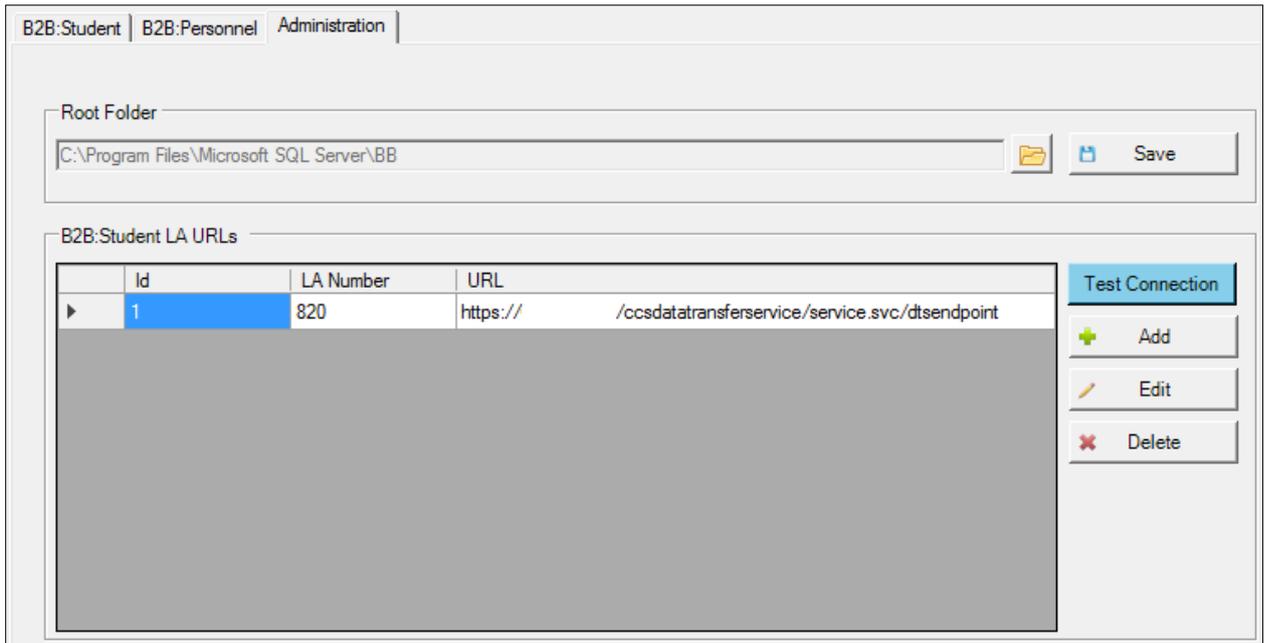
For each LA to which data is to be exported, the LA number and corresponding B2B Student URL must be entered in the **B2B:Student LA URLs** panel in the **Administration** tab, along with the **User Name** and **Password**. If data is to be exported to any out of county LAs, then the receiving LA must have the appropriate licence. For more information, see *Licensing* on page **Error! Bookmark not defined.**

**NOTE:** If details for a school have been entered in the B2B:Student tab, then B2B Open checks for B2B:Student credentials entered for the school. If none are found, then B2B:Open checks for login details entered in the **B2B Student LA URLs** panel for the destination LA. This process accommodates environments where, for example, the LA issues their own schools individual login credentials but use a general credential for schools that send data to the LA but are not part of the LA.

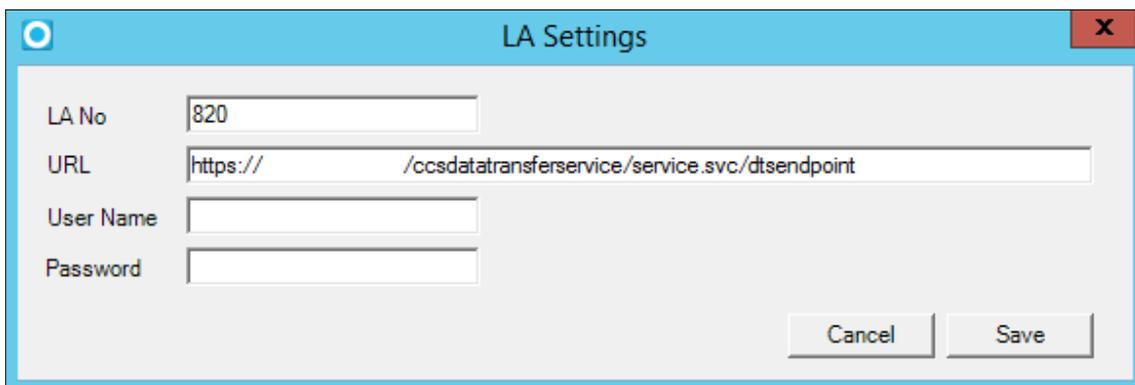
To enter LA B2B details:

1. Select the **Administration** tab.

## General Configuration



2. In the **B2B Student LA URLs** panel, click the **Add** button to display the **LA Settings** dialog.
3. Enter the **LA No** and the **URL** for the B2B service at the destination LA.



4. If the LA uses the same user name and password for all schools instead of assigning each school their own credentials, then enter the LA-wide **User Name** and **Password**.
5. Click the **Save** button to record the URL details for the LA. A confirmation dialog is displayed.
6. Click the **OK** button to close the dialog. The LA details are now displayed in the list.



## Viewing Logs

The error logs can be useful for diagnosing problems encountered when configuring B2B:Open. The **Logs** panel, available in both the **B2B:Student** and **B2B:Personnel** tabs, displays log messages that are created each time an export is attempted for a school. For error messages, descriptions are provided to help you resolve the issue.

**NOTE:** Existing log data in B2B: Student version 2.2 is not migrated.

Date	Level	LA No.	Dest. LA No.	School No.	Message
24/04/2019 1...	INFO	820	820	4321	Test Connection Successful.

- In the **B2B:Student** tab, you can filter log messages by entering the **LA No.** or **School No.**
- To view additional details about a specific error message, select the message in the **Logs** panel and click the **Details** button to display the **Log Details** dialog.

- To delete a log entry, select the entry and click the **Delete** button to display a confirmation dialog. Click the **Yes** button to delete the message.
- To update the log messages, click either the **Refresh Logs** button in the **B2B:Student** tab or the **Refresh** button in the **B2B:Personnel** tab.

# 05 | Exporting B2B:Student Data

## Introduction

The **B2B:Student** tab is used to maintain school details, set up a Scheduled Task or manually export files. Before data is exported, the B2B URL for each destination LA must be entered in the **Administration** tab. See [Entering LA URLs for B2B:Student](#) on page 17.

**Note:** Data can be exported without entering school details if LA level credentials are provided in the **Administration** tab.

## Adding School Details

For schools sending data to a single local authority and for which the local authority uses a common B2B credential for all B2B schools, the school information does not need to be entered in the **Schools Details** panel. However, if a school is exporting data to multiple local authorities or the local authority issues school specific B2B credentials, then the school details must be added to the **School Details** panel.

School Details				
	School Name	LA No.	Dest. LA No.	School No.
▶	Green Abbey B2BO	820	820	4321

Complete the following procedure to add your school information to the **School Details** panel:

1. In the **School Details** panel, click the **Add** button to display the **B2B: Student Configuration** dialog.

2. Enter the following details:

Field Name	Description
<b>School Details:</b>	
School Name	Name of the school.
School No.	Four digit school number.
LA No.	Number of the LA to which the school is affiliated.
<b>Destination Details:</b>	
LA No	Three digit LA number to which the school / third party has to export the file.
User Name	User name set up for the school in One that is required by the web server to authenticate the school.
Password	Password set up for the school in One that is required by the web server to authenticate the school.
<b>Folder Locations:</b> (Not editable, automatically created in the directory defined in the <b>Root Folder</b> panel on the <b>Administration</b> tab)	
Files Not Exported	Storage location of any files that are not yet exported.
Files Exported	Storage location of any files that are exported

## Editing the School Details

The details for a school may be edited as follows:

1. Select the required school in the **School Details** list.
2. Click the **Edit** button to display the **B2B: Student Configuration** dialog.
3. Enter any required changes.
4. Click the **Save** button to complete the process.

## Deleting a School

1. The details for a school may be deleted as follows:
2. Select the required school in the **School Details** list.
3. Click the **Delete** button to display the **Confirmation** dialog.
4. Click the **Yes** button to delete the school.

## Testing the Connection to the B2B:Student Server

After adding schools, the connection to the B2B:Student web server should be tested to ensure that all URLs, user names and passwords are correct. To test the connection, select the school to test then click the **Test Connection** button.

If a connection cannot be established, then an error message is recorded in the **Logs** area.

## Exporting B2B:Student Data Manually

Data can be exported to the LA either manually (by clicking the **Export** button) or automatically (via the **Scheduled Task**). When data is exported manually, the information is sent immediately instead of waiting for the **Scheduled Task** to run. Both export methods send all data contained in the **Files Not Exported** folder.

### *Exporting B2B:Student Data*

1. Ensure all files to be sent are in the correct **Files Not Exported** folder.
2. In the **School Details** panel of the **B2B:Student** tab, click the **Export** button. Any files in the **Files Not Exported** folder are sent to the LA.

Once exported, files are moved to the **Files Exported** folder.

**More Information:**

Configuring Scheduled Task Settings **on page *Error! Bookmark not defined.***

# 06 | Exporting B2B:Personnel Data

## Introduction

The **B2B:Personnel** tab is used to maintain school details, and to export and import personnel data. Before B2B:Personnel data can be exported, the B2B Personnel URL must be entered and any required schools must be added via the **School Details** panel. After the URL and schools are added, click the **Export** button to export the data to the LA or the **Import** button to import data from the LA.

B2B:Personnel URL

School Details

	School Name	LA No.	School No.
▶	Green Abbey B2BO	820	4321

Logs

	Date	Level	LA No.	School No.	Message
▶	24/04/2019 1...	WARN	820	4321	Test Connection Failed

## Adding School Details

To export data from a school, they must be added to the **School Details** panel. In most scenarios, only one school (the one exporting or importing its data) needs to be added. Multiple schools can be added if required, but they must be added individually.

Complete the following procedure to add a school to the **School Details** panel:

1. In the **School Details** panel, click the **Add** button to display the **B2B:Personnel Configuration** dialog.

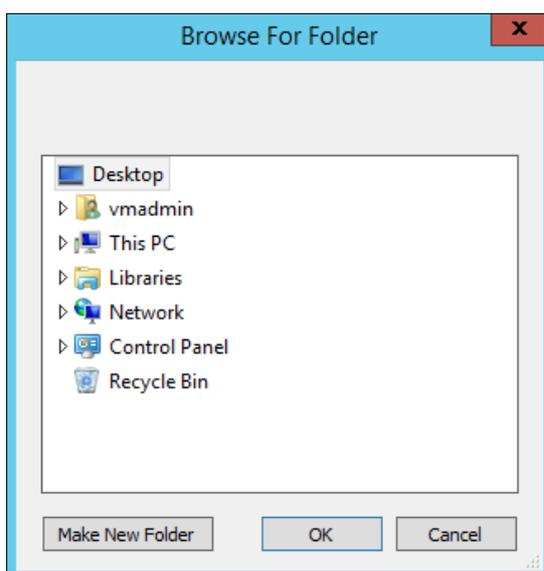
## Exporting B2B:Personnel Data

2. Enter the following details.

Field Name	Description
School Name	Name of the school that is sent in the XML file when it is generated.
LA No	Three digit LA number which is sent in the XML file when it is generated.
School No.	Four digit school number which is sent in the XML file when it is generated.
User Name	User name set up for the school in One that is required by the web server to authenticate the school.
Password	Password set up for the school in One that is required by the web server to authenticate the school.
Files Not Exported	Storage location of any files that are not exported.
Files Exported	Storage location of any files that are exported.
Files Imported	Storage location of any files that are imported.

3. Select **Files Not Exported**, **Files Exported** and **Files Imported** locations.

a. Click the folder icon adjacent to the required field to display the **Browse For Folder** dialog.



b. Navigate to and select the location on your local machine where you would like to save the files.

- c. Click the **OK** button to return to the **B2B:Personnel Configuration** dialog.
4. Click the **Save** button.

## Editing the School Details

The details for a school may be edited as follows:

1. Select the required school in the **School Details** list.
2. Click the **Edit** button to display the **B2B:Personnel Configuration** dialog.
3. Enter any required changes.
4. Click the **Save** button.

## Deleting a School

1. The details for a school may be deleted as follows:
2. Select the required school in the **School Details** list.
3. Click the **Delete** button to display the **Confirmation** dialog.
4. Click the **Yes** button to delete the school.

**NOTE:** If the school is listed in both the *B2B:Student* and *B2B:Personnel* tabs, deleting the school from one tab will not delete the school from the other tab.

## Testing the Connection to the B2B:Personnel Server

After adding schools, the connection to the B2B:Personnel web server should be tested to ensure that all URLs, user names and passwords are correct. To test the connection, select the school to test then click the **Test Connection** button. If a connection cannot be established, then an error message is recorded in the **Logs** area.

## Exporting B2B:Personnel Data Manually

Exporting B2B:Personnel data can be performed manually or automatically (via the **Scheduled Task**). When data is exported manually, the information is sent to the LA immediately instead of waiting for the scheduled task to run.

To export data manually, select a data file from the **Files Not Exported** folder set up for the required school and then it will be sent to the LA.

1. In the **School Details** panel, select the school whose data is to be exported.
2. Click the **Export** button.
3. Once exported, the file is moved to the **Files Exported** folder.

## Importing B2B:Personnel Data Manually

Importing B2B:Personnel data can be performed manually or automatically (via the scheduled task). When done manually, the data is imported immediately instead of waiting for the scheduled task to run.

1. In the **School Details** panel, select the school whose data you wish to import.
2. Click the **Import** button.
3. Once imported, the file is moved to the **Files Imported** folder.



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