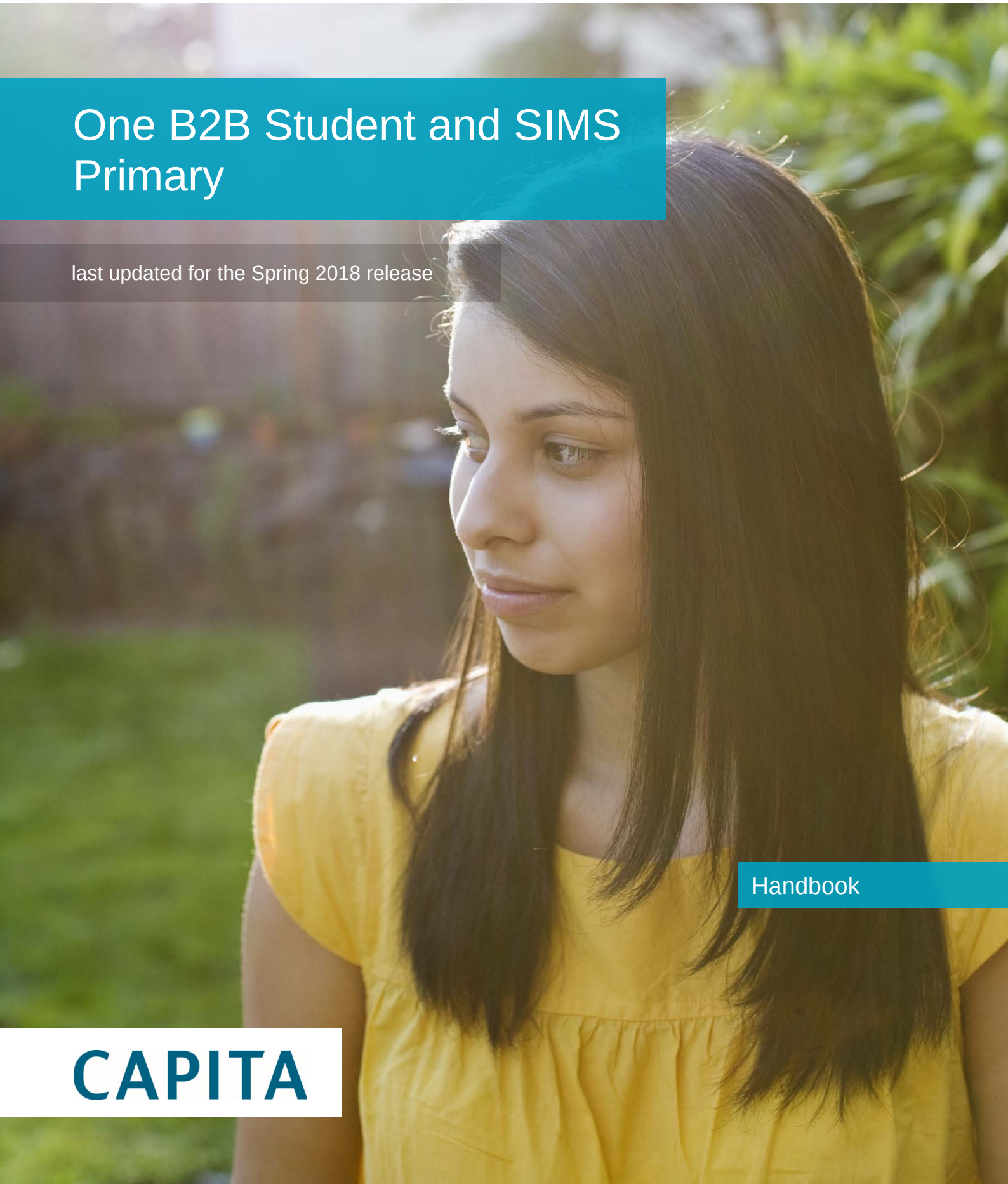
oneeducation

One B2B Student and SIMS Primary

last updated for the Spring 2018 release



Handbook

CAPITA

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Contents

01 | SIMS Primary and One B2B:Student 1

Introduction 1

Process Overview 1

Pre-requisites 1

Creating a SIMS Primary Attendance Changed Data scheduled task 2

Migrating a base as SIMS Primary in One Education 2

Verifying Base migration 4

02 | Post Migration 6

Post Installation Overview 6

Changed Data Items and Data Transfer 6

Run a snapshot 6

Scheduled Tasks 6

Initial data transfer after a base is migrated to SIMS Primary 6

Viewing the Scheduled Tasks log 6

School Portal changes 7

Scheduled task data options 7

Locking down a scheduled task 8

Index 10

01 | 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.

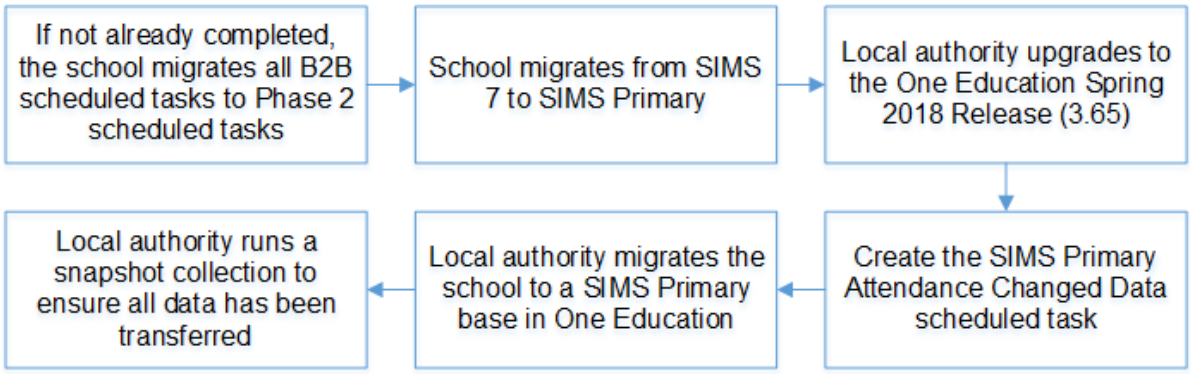
Process Overview

There are several configuration steps that must be completed to enable B2B:Student and SIMS Primary to exchange data.

There are two migrations that must occur for a SIMS Primary school to exchange data with One Education via B2B:Student. Firstly, the school must migrate from using SIMS 7 to SIMS Primary. Once a school has migrated, and the LA are on the correct version of One Education, the LA can migrate the base in One Education.

After migrating to SIMS Primary, B2B will still have the ability to collect Snapshot, Changed Data and Attendance data. Also, whilst it is still currently possible to collect Attainment data and have two-way transfer of data back to the school, this is not supported.

The following process flow diagram outlines the recommended migration process:



Pre-requisites

- School using SIMS Primary
- One Education Spring 2018 Release (3.65)
- 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 2 scheduled tasks – Before migrating a base to SIMS Primary, all scheduled tasks should be migrated to Phase 2. If this is not undertaken, there will be no scheduled tasks set up for use. For more information on migrating scheduled tasks to Phase 2, refer to the *Migrating B2B:Student Scheduled Tasks* topic in the *Managing B2B:Student* handbook, available from the SIMS documentation centre.
- 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.

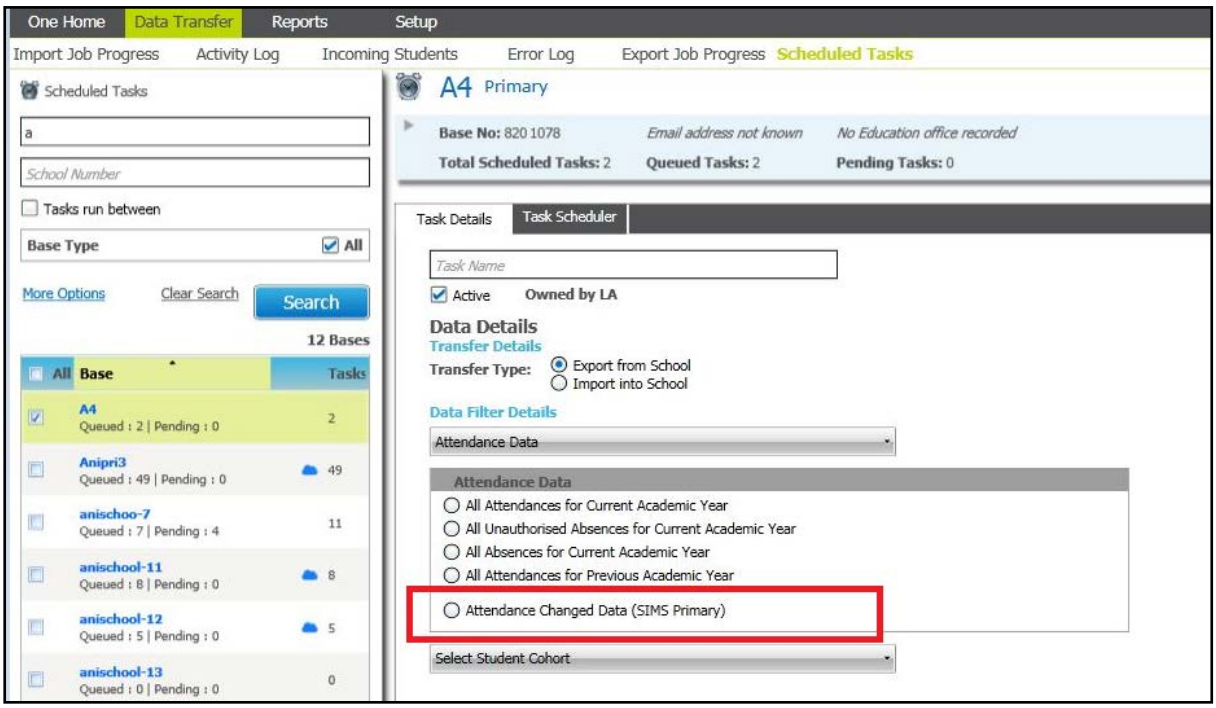
Creating a SIMS Primary Attendance Changed Data scheduled task

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, you create a SIMS Primary Attendance Changed Data scheduled task. 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 you cannot 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 you create the attendance task 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.

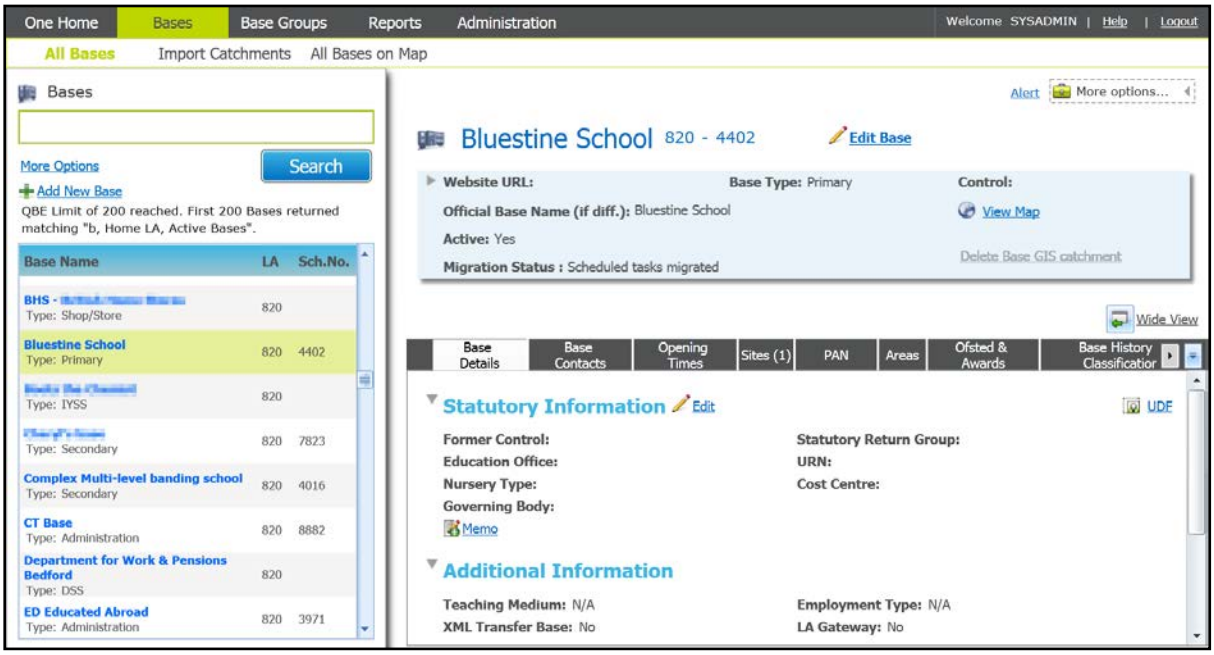
Migrating a base as SIMS Primary in One Education

After a school has migrated from SIMS 7 to SIMS Primary, the school or the LA must contact the SIMS Service Desk to receive their connection details. The required details are the **Client ID**,

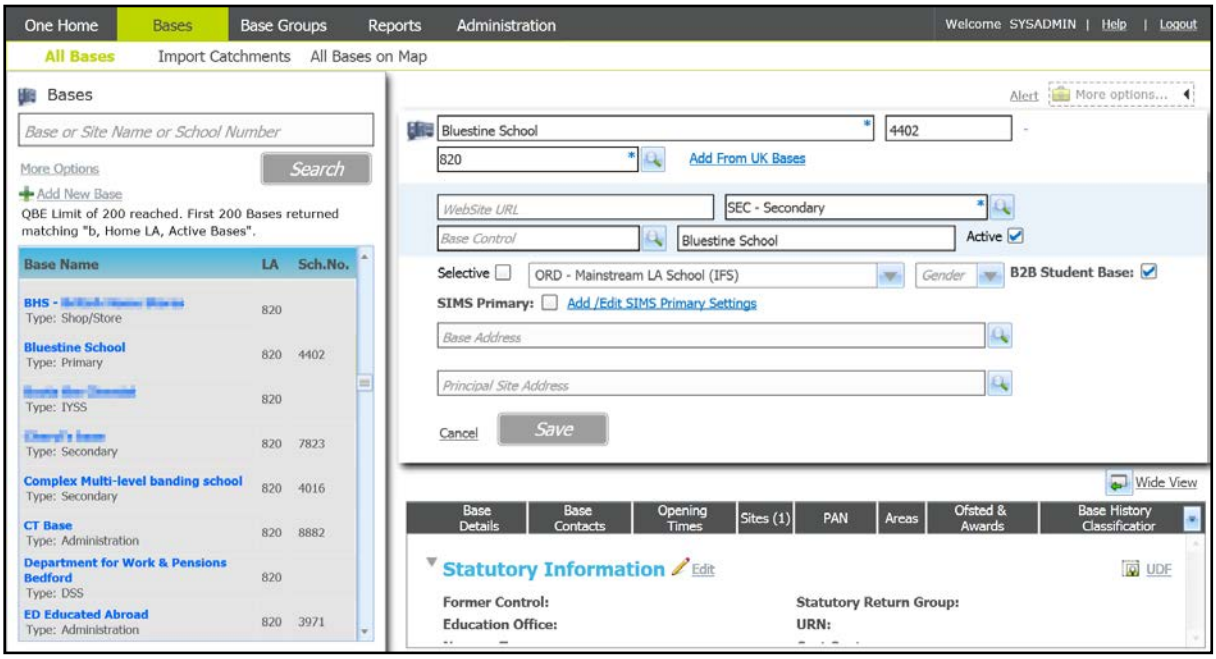
Secret, **Subscription Key**, and **Organisation ID**. If the school obtains the connection details from the SIMS Service Desk, they should pass these details to their LA for B2B Student to ensure connection to SIMS Primary.

Once you have the connection details for the school, you can migrate the school's base to a SIMS Primary enabled base in the One v4 Online Bases module.

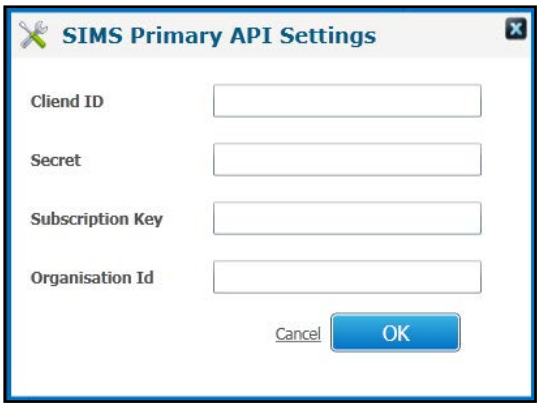
1. Log into v4 Online and click the **Bases** button.
2. Search for and open the base you want to migrate to SIMS Primary.



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

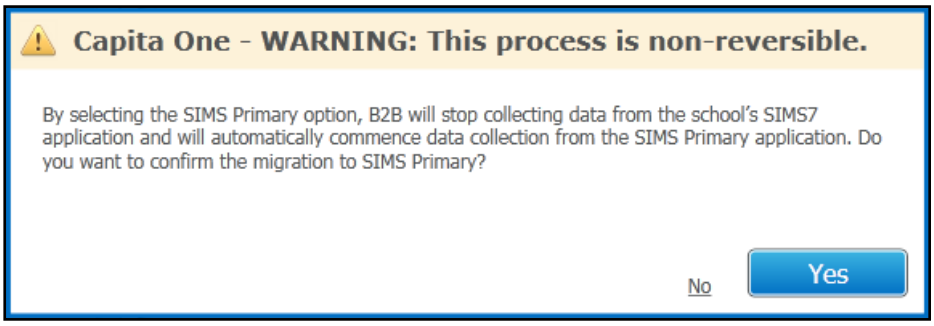


4. Click the **Add/Edit SIMS Primary Settings** hyperlink to display the **SIMS Primary API Settings** dialog.



5. Enter the settings supplied by the SIMS Service Desk. You must enter the **Client ID**, **Secret**, **Subscription Key**, and **Organisation ID.**
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.*

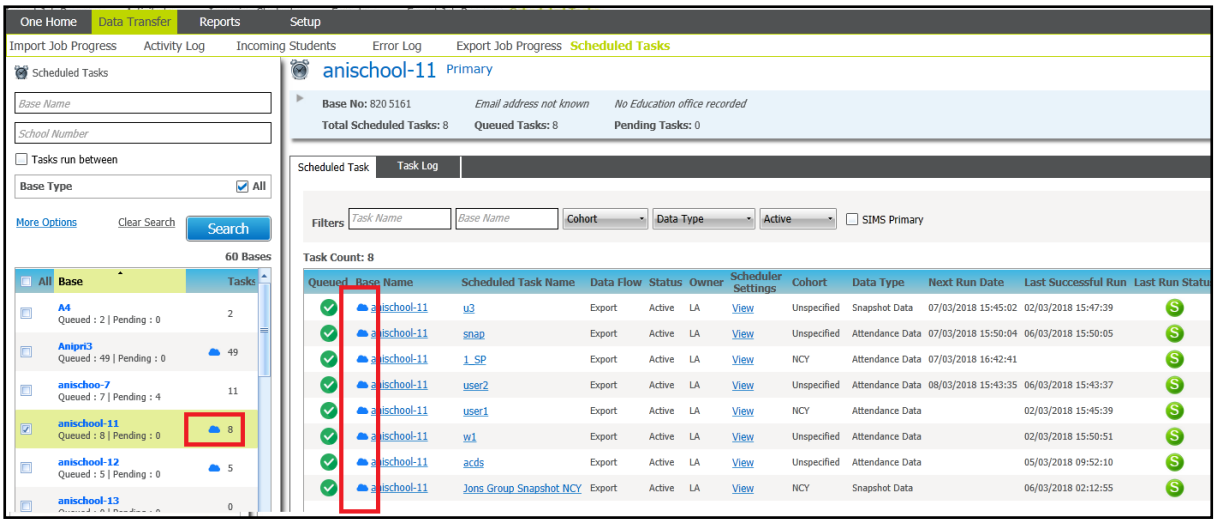


8. Click the **Yes** button to finish migrating the base to a SIMS Primary base.

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.


One Home
Data Transfer
Reports
Setup
Import Job Progress
Activity Log
Incoming Students
Error Log
Export Job Progress
Scheduled Tasks
Scheduled Tasks
Base Name
School Number
Tasks run between
Base Type
All
More Options
Clear Search
Search
60 Bases
All
Base
Tasks
A4
Queued : 2 | Pending : 0
2
Anipri3
Queued : 49 | Pending : 0
49
anischoo-7
Queued : 7 | Pending : 4
11
anischool-11
Queued : 8 | Pending : 0
8
anischool-12
Queued : 5 | Pending : 0
5
anischool-13
0
anischool-11
Primary
Base No: 820 5161
Email address not known
No Education office recorded
Total Scheduled Tasks: 8
Queued Tasks: 8
Pending Tasks: 0
Scheduled Task
Task Log
Filters
Task Name
Base Name
Cohort
Data Type
Active
SIMS Primary
Task Count: 8
Queued
Base Name
Scheduled Task Name
Data Flow
Status
Owner
Scheduler Settings
Cohort
Data Type
Next Run Date
Last Successful Run
Last Run Statu
anischool-11 u3 Export Active LA View Unspecified Snapshot Data 07/03/2018 15:45:02 02/03/2018 15:47:39
anischool-11 snap Export Active LA View Unspecified Attendance Data 07/03/2018 15:50:04 06/03/2018 15:50:05
anischool-11 1_SP Export Active LA View NCY Attendance Data 07/03/2018 16:42:41
anischool-11 user2 Export Active LA View Unspecified Attendance Data 08/03/2018 15:43:35 06/03/2018 15:43:37
anischool-11 user1 Export Active LA View NCY Attendance Data 02/03/2018 15:45:39
anischool-11 w1 Export Active LA View Unspecified Attendance Data 02/03/2018 15:50:51
anischool-11 acds Export Active LA View Unspecified Attendance Data 05/03/2018 09:52:10
anischool-11 Jons Group Snapshot NCY Export Active LA View NCY Snapshot Data 06/03/2018 02:12:55

02 | Post Migration

Post Installation Overview

The following chapter highlights the key issues to address once you have migrated a base to a SIMS Primary base in B2B:Student.

Changed Data Items and Data Transfer

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.

Run a snapshot

The change tracking against data within SIMS 7 data items is not available in SIMS Primary. Therefore, after a migration, the change tracking data is lost and reset; the date of the migration is used as the change date. We advise a snapshot file is captured post migration to collect all data. If you are sure you have all changes before the school migrates, you can continue to collect changes only.

Scheduled Tasks

Scheduled tasks enable you to control when and what types of data are exchanged between One B2B:Student and SIMS Primary.

If a Phase 2 scheduled task existed in One before migrating the base to SIMS Primary, then existing snapshot and changed data tasks will continue to work. If you set up a SIMS Primary attendance task prior to migration, this will now start pulling data as per the schedule. All attainment, two way, SIMS 7 attendance tasks and Phase 2 scheduled tasks will be made inactive.

Initial data transfer after a base is migrated to SIMS Primary

After a base is migrated to SIMS Primary, to ensure all changes from the migration date are captured, the first changed data scheduled task will attempt to collect all changes since the migration. This will work on the basis that you migrated the base in One to SIMS Primary within three months of the school migrating from SIMS 7 to SIMS Primary. Therefore ensure the first scheduled task of attendance student data has been completed within 3 months of the migration.

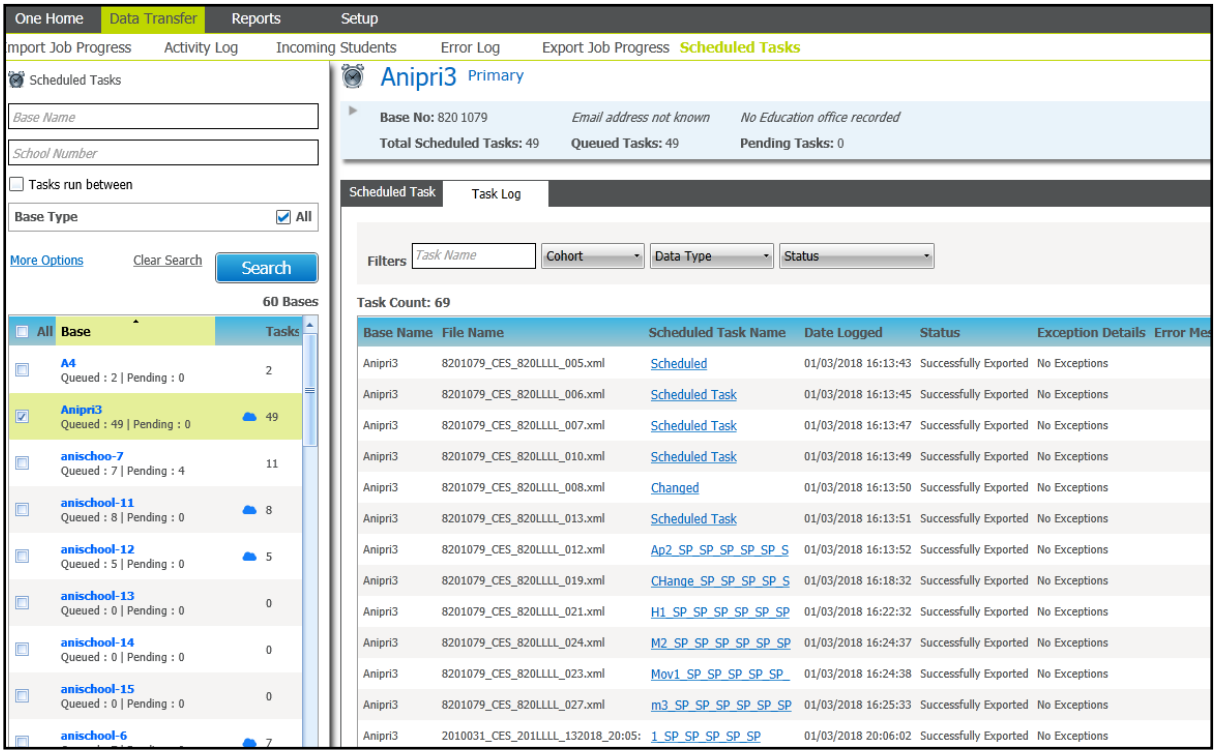
Viewing the Scheduled Tasks log

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.



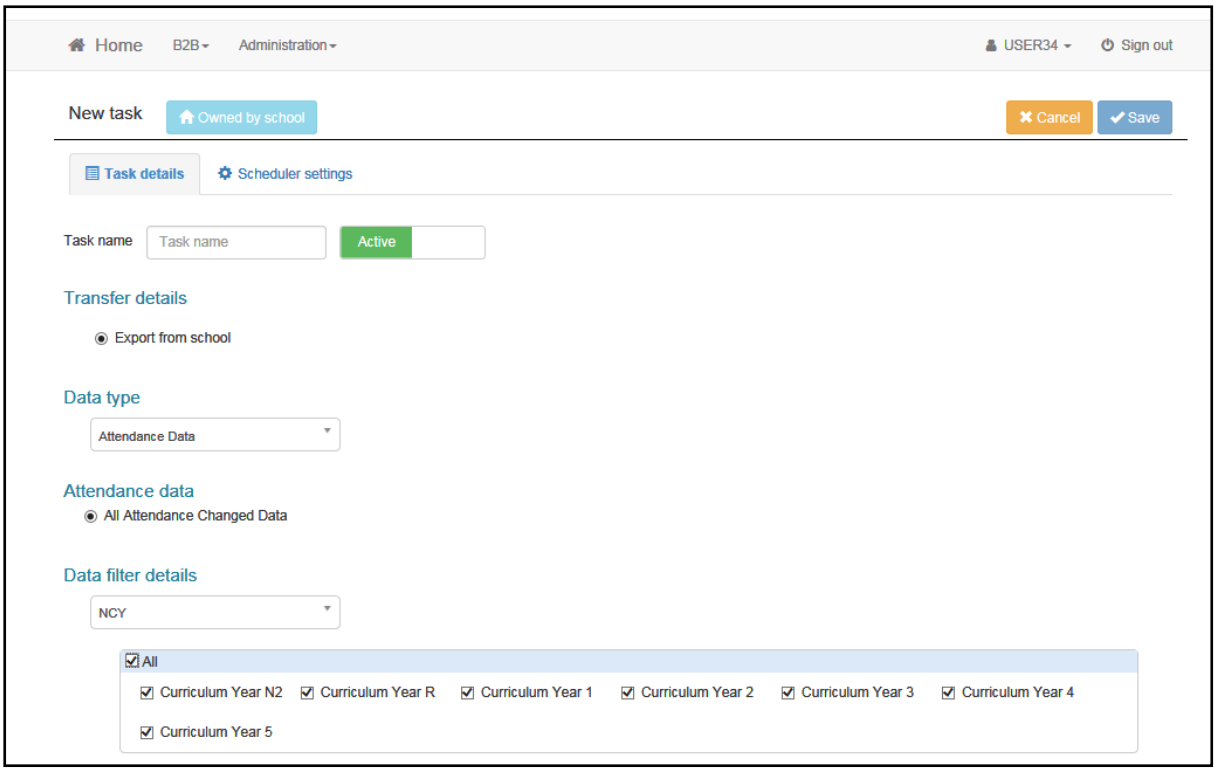
School Portal changes

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. You should ensure schools have the required URL and login details for the School Portal.*

Scheduled task data options

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**.

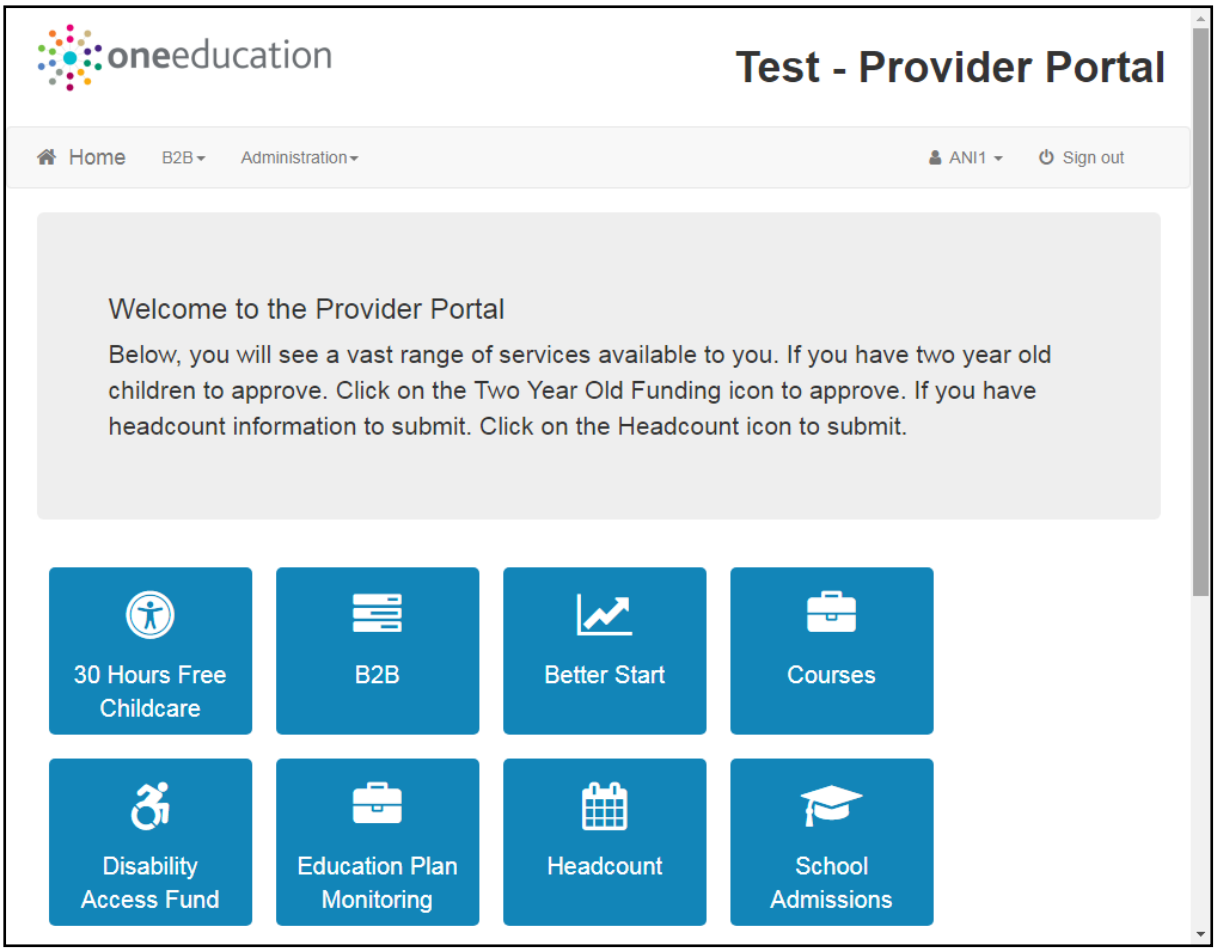


Locking down a scheduled task

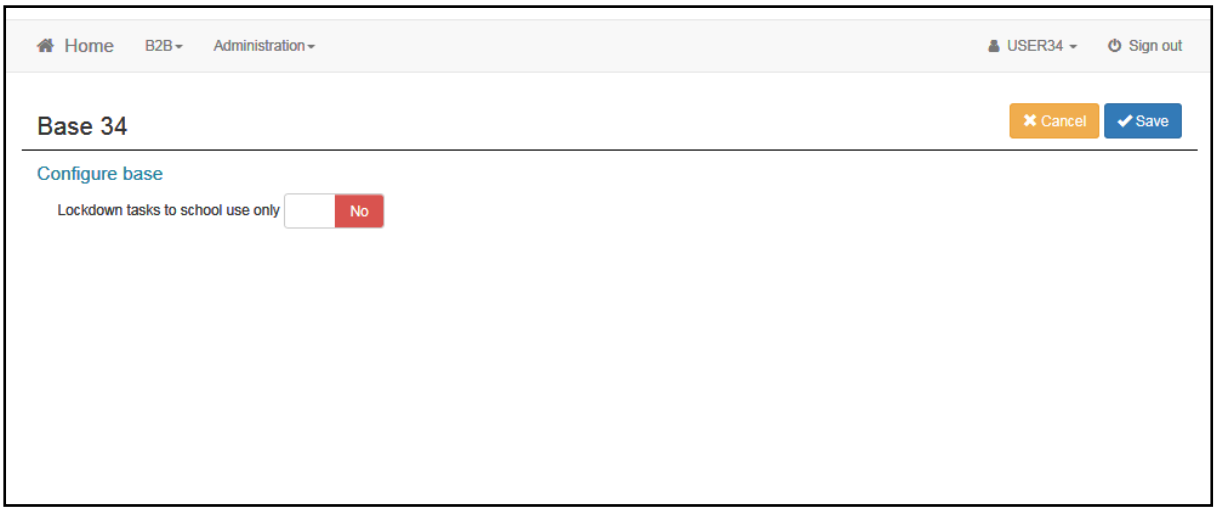
The ability for a school to lock down all scheduled tasks at once has moved to the B2B:Student School Portal. Formerly, it was accessed via SIMS. If the tasks were locked down before the migration, they will continue to be locked down after the migration. The existing ability to lock down individual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

To lock down all scheduled task:

1. Log on to the School Portal.



2. Click the **B2B** tile to display your scheduled tasks.
3. Click the **Configure** button to display the **Configure base** page.



1. Click the **Lockdown tasks to school use only** toggle to display **Yes**.

Index

Migrating a Base 2
  Verification 4
Overview 1
  Post Installation 6
Post Migration
  Changed Data Items 6
  Initial Data Transfer 6
  Scheduled Tasks 6
  Scheduled Tasks Log 6
  School Portal 7
  Snapshot 6
Pre-requisites 1
Scheduled Task 2