



One B2B:Student Handbook

last updated for the Spring 2019 release

Handbook

CAPITA

Revision History

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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:

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01 / Document Change Control

Date	Release	Description
Apr 2019	3.68	<p>There is now a bulk delete option available in SIMS to remove some or all data for leavers. This could mean an occasional increase in the volume of data shown in the Deleted by School tab.</p> <p>See <i>Deleted by School</i> on page 138</p>
		<p>Where previously SEN Stage End Dates & SEN Needs Dates were not importing - a permission that was wrongly linked to the 'LA Scheduled Tasks' User Group Process has been moved to the 'B2B Import/Export' User Group Process. SEN dates will now import correctly.</p> <p>See <i>Setting up Permissions for Enabling Schools to request to Import and Export data</i> on page 13</p>

02 / One B2B:Student

Overview

B2B: Student v4 is a module within One which enables the import of student data from schools to One at the Local Authorities.

B2B: Student transfers data via an XML file which is generated by schools in SIMS.

Import from School to LA

Populate One:	This may be all students that are enrolled at the school, or potentially a subset, e.g. a selected NCY.
Update One:	All students in a school where one or more data items have been changed.

Where to find more information on B2B:Student and SIMS

For more information on using B2B:Student in SIMS, please refer to the *Managing B2B:Student* handbook, available from the SIMS Publications website ([Managing B2B:Student handbook](#))

Prerequisites

The B2B:Student tool is spread across both One v4 Online and the One Provider Portal website. Therefore, you must ensure that your v4 Online and Provider Portal environments are installed and configured properly before configuring B2B:Student.

More Information:

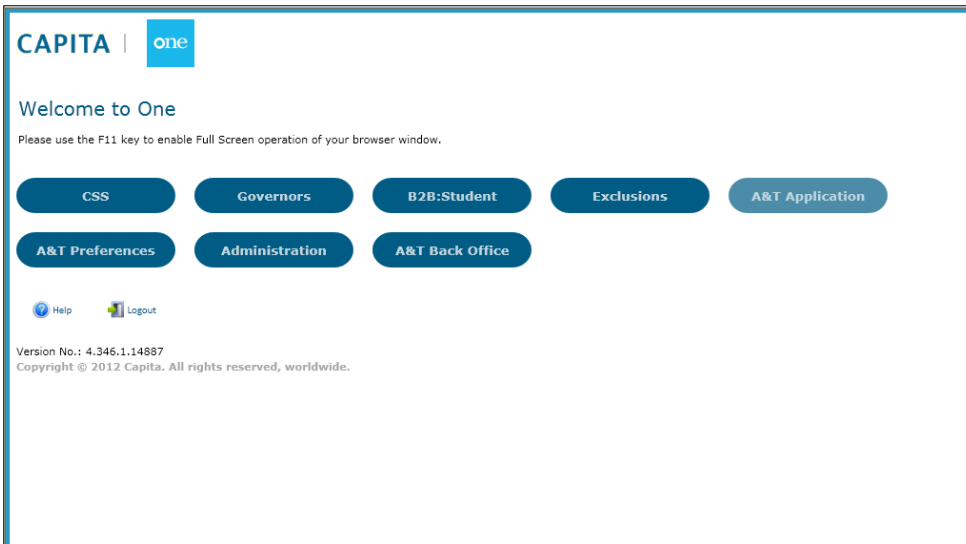
Installing and Configuring the CSS Online Portal technical guide, available from the One Publications website (www.onepublications.com)

Deploying and Configuring the One Provider Self Service Portal for Local Authorities technical guide, available from the One Publications website (www.onepublications.com)

Licences

B2B:Student v4 is a One module which requires a licence to be purchased. To activate the licence, the licence key must be entered and saved in **One Module Launcher | Tools | Licensing** window.

If the Local Authority has a current B2B:Student v4 licence the B2B:Student option will be enabled in the v4 Online screen which will allow access to all the B2B:Student functionality and screens. If the Local Authority does not have a license for B2B:Student v4 then the B2B:Student option will not be available.



NOTE: If a valid licence key is not entered in One then it will not be possible for the users to access B2B:Student v4.

Module	Licence Key
Admissions and Transfers	*36*36*85*85
Admissions and Transfers Non Public v.4	*16*85*65*55*65*06
Admissions and Transfers Online	6*75*06*36*46*4
Admissions and Transfers Online v.4	*06*85*65*26*55*26
Admissions and Transfers v.4	*36*85*65*46*65*46
All API	
Attendance	5*75*06*06*46*6
Attendance v.4	*16*75*65*65*26*55
B2B	5*46*85*26*95*8
B2B Personnel	5*36*36*55*85*8
B2B Student v.4	*75*95*65*95*85*46
Bases	5*55*65*46*85*9
CSS Referrals Online	6*36*95*85*36*4
Carer Payments	
Child Employment	5*75*85*55*75*6
Children Support Services Online	*26*85*65*85*65*85
Children Support Services v.4	*26*55*65*75*55*16
Children in Entertainment	5*36*95*55*36*6
Children's Support Services	5*16*75*46*46*9
Common Transfer File	5*65*85*26*65*8

Once the licence key is entered and saved, the user should log out of One and then log in again to ensure that the licence is activated.

Licences for B2B attainment

In order to use the B2B attainment functionality, you must also have a Pulse licence and a B2B attainment licence installed. B2B attainment licences are free to customers who already have a B2B:Student and Pulse licence.

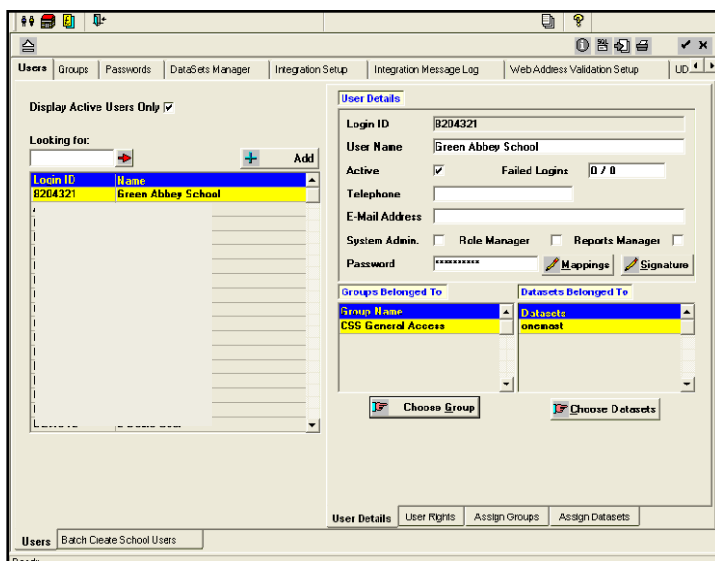
03 / B2B: Student Setup

Local Authority/One Setup

Issuing User Names and Passwords

A user name and password needs to be set up in System Administration for every school that will be running B2B:Student v4.

NOTE: The User Name and Passwords need to be sent to each School along with the One web server URL otherwise it will not be possible for them to connect to the One web server for data transfer via B2B: Student. Those Local Authorities that already have B2B:Student there will be no need to re-create any User Names or Passwords for any of your existing Schools that are already using B2B:Student v3.



School Groups should be set up and populated with Users.

Creating Groups

The **Groups** tab page is located in System Administration.

To add a Group click the **Add** button, enter a **Group Name** and **Description** and **Save** the record.

Names can be added or removed from the Group when required. The Group names appear on the left of this tab in alphabetical order, with a search facility.

Populate the Group by clicking the **Choose** button. A chooser will display all active users not already included in the Group. Select appropriately and click Save.

Alternatively, clicking the **Choose by Base** button opens the Choose Group Members chooser which allows you to select individual users to form a Group specifically for a **Base** or **Base Type** which are mapped to specific Datasets. Select the appropriate Dataset from the drop-down list.

When a Group Name is highlighted the Active Group Members are displayed on the right of the window.

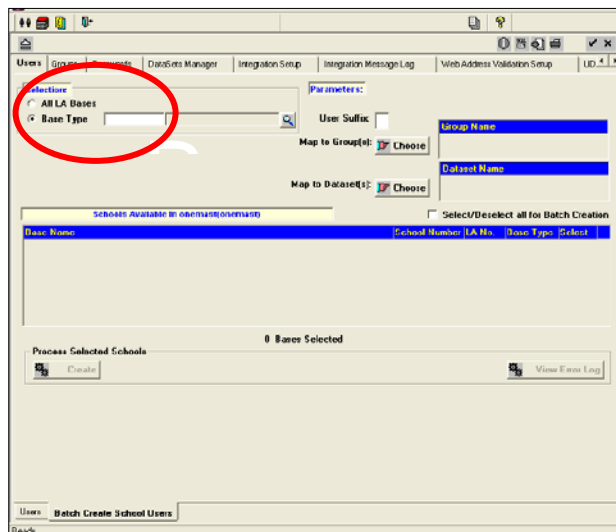
Batch Create School Users

The Batch Create School Users sub-tab is located in System Administration | Users. The purpose of this sub-tab is to create School User IDs to give Schools access to One Online and B2B: Student 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 you to select individual **Schools**, **All Schools** or **Schools by Type**, then batch create User IDs for those selected.

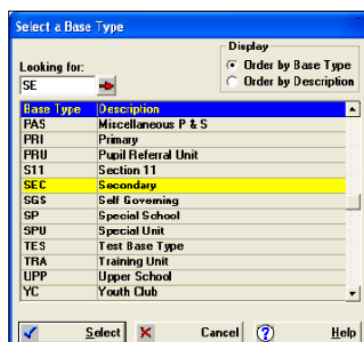
To Create School Users

Select whether you wish to create User IDs for schools from a list of **All LA Bases** or for individual Schools of a specific **Base Type**.



Clicking the **All LA Bases** radio button will list all Local Authority schools, recorded on the One database, in the **Schools Available** scrollable box. The **Schools Available** label will indicate the current **Dataset** and **Server**, e.g. Schools Available in OneDemo(@<Server Name>).

If you wish to create User IDs for schools of a specific type, click the **Base Type** radio button and select from the **Select a Base Type** lookup. This will filter the list of Local Authority Schools Available based on the selected Base Type.

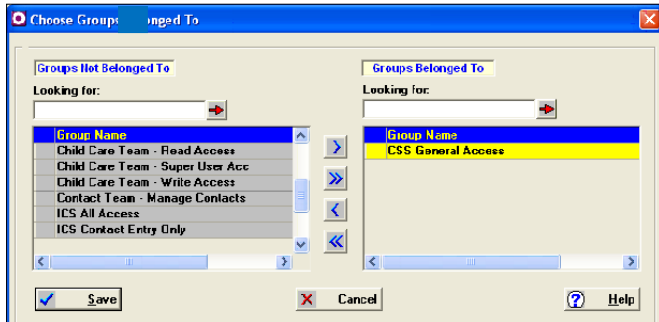


The **Schools Available** box on the tab will display the selected schools, showing the Base Name, School Number, LA Number and Base Type. Each row has a **Select** checkbox. The **Create Process** will create a User ID for each school which has the **Select** box checked.

Checking the **Select/Deselect all for Batch Creation** box can be used to check all or clear all. Random schools may be selected (or deselected).

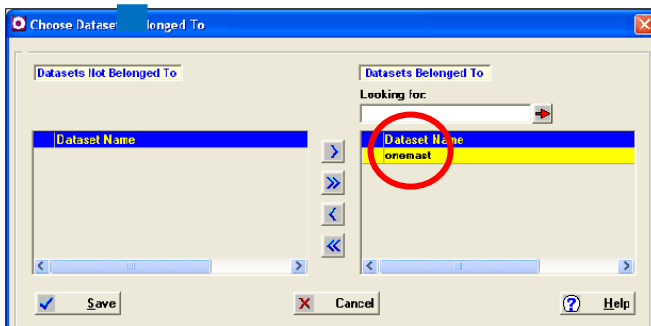
Before the Create Process is started:

- Select a Group to which the proposed User IDs will be linked. To do this, click the **Map to Group(s) Choose** button. This will open a **Groups** chooser listing available groups which have been created on the **Groups** tab page in System Administration. The **Create** button will then become active.



- Select at least one dataset to which the proposed User IDs will have access. To do this, click the **Map to Dataset(s) Choose** button. This will open a **Datasets** chooser listing available datasets (these are recorded on the **One Datasets Manager** tab page

Use the top single arrow to move a dataset into the **Datasets Belonged to** pane. Clicking the double arrow will move all datasets into the Datasets Belonged to pane.

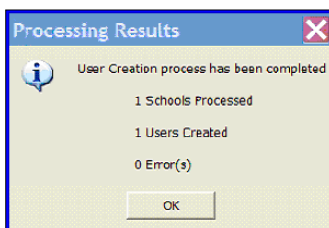


User navigation rights are applied to the Group. This means that the new User IDs will be included in the selected Group or Groups, assuming the user rights are assigned to the Group(s).

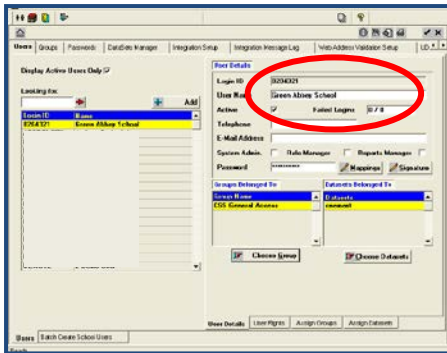
A **User Suffix** may be used, if required. This may be a digit, 1-9 or a character A-Z. This facility gives the Local Authority the ability to repeat the process and create multiple User IDs for a school, optionally in a different Group with different navigation rights. The Suffix will be added to both the User ID and the User Name.

Click the **Create** button to start the process. When the process is complete the new User IDs will be displayed in the list on the User tab, showing the **User ID** and **User Name**.

A message will be displayed to confirm that the users have been generated.



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.



Passwords

In order to determine the passwords for a school, an Excel spread sheet is included on the release media under the Documents v3 folder (Batch Create User Password.xls). The spread sheet is designed to allow 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) will be displayed. Once the Local Authority has contacted the individual school with their password, the school will be advised to change the password after using it for initial entry to the One Online system or B2B: Student.

Setting the maximum age for incoming unmatched students

The **B2B_S_AGE** parameter controls the maximum age for incoming students to be displayed in the **Unmatched Student** tab. Whatever age is set, any incoming students older than the defined age will not be displayed in the **Unmatched Student** tab. The default age is 18, meaning incoming students over 18 will not be displayed.

To set the maximum age for incoming unmatched students:

1. Log in to the v3 Client and select **Tools | System Administration**.
2. Select the **LA Defaults** tab.
3. Scroll down and select **B2B_S_AGE** parameter.
4. In the **Value** field, enter the maximum age for incoming unmatched students.

Setting the minimum age for a child to be considered a carer

The **Carer_Min** parameter controls the minimum age a child must be in order that they can be considered for carer matching. If a child is equal to or older than the **CARER_MIN** age, then they can be matched, either manually or automatically, as a carer for an incoming child.

To set the minimum age for incoming unmatched carers:

1. Log in to the v3 Client and select **Tools | System Administration**.
2. Select the **LA Defaults** tab.
3. Scroll down and select **Carer_Min** parameter.
4. In the **Value** field, enter the maximum age at which a child can be considered a carer.

Configuring the integration service to work with B2B attainment import

To enable One to import B2B:Student attainment data from schools, the integration service must be configured. The settings are accessed via the CCSCfg utility. You need the application server URL and a username and password for a One user with permissions to import Pulse data. At a minimum, the user requires Read-Write access to the **Results** and **Student Details** business processes under the **Data Importing** main business process.

1. Open the CCSCfg utility.
2. Select the **Integration Service** tab.

The screenshot shows the 'Capita Children's Service Enterprise Server Configuration Utility' window. The 'Integration Service' tab is selected. The 'CCS Integration Service List' shows 'CCS Enterprise Integration Service'. The configuration page is titled 'D:\13.59\CCSEnterprise\Windows Services\Integration Server\Integration Server\bin\Debug' and includes a 'Save' button. The configuration is divided into four sections:

- 1. Oracle Connection Information:** Oracle Service Name (devb2b2), Oracle Username (onemx64), Oracle Password (masked), and Confirm Password (masked).
- 2. Retention Periods:** AnT Jobs (120), B2B Jobs (90), and Default Jobs (180).
- 3. Other Details:** Polling Interval (Seconds) (60), Max Threads (5), Portal Update Interval (Minutes) (2), and Max parallel tasks in bulk processing (10).
- 4. Application Server Settings:** Application Server URL (http://localhost/CCSEnterprise_ApplicationService_Debug_3.59), Username (sysadmin), and Password (masked).

The version number 1.0.0.0 is visible at the bottom left of the window.

3. Enter the **Application Server URL**.
4. Enter the **Username** and **Password** for a user with the appropriate permissions.
5. Click the **Save** button to save your changes.

MORE INFORMATION:

RG_Permissions_User Group Processes available from My Account and the One Publications website (www.onepublications.com)

Setting up Permissions for Enabling Schools to request to Import and Export data

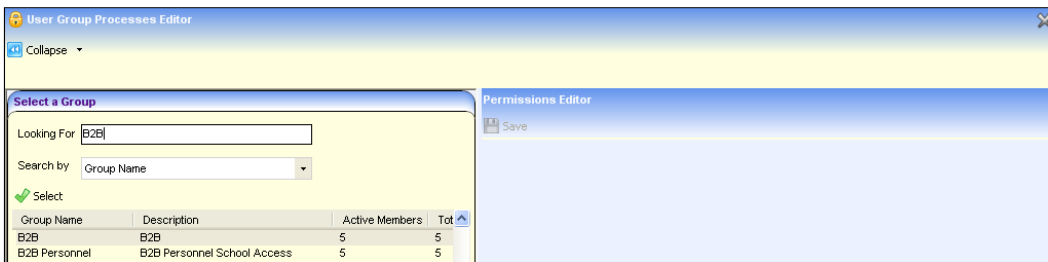
NOTE: Schools can import data from the LA and export data to the LA. For schools to use this functionality, the permission for the **B2BS Import/Export** and **Import/Export Data** processes must be set to **Read-Write**. This set up only needs to be done once.

Tools | Permissions | User Group Processes

A process has been created that must be to be set up for all the schools. You will need to create a group for your schools.

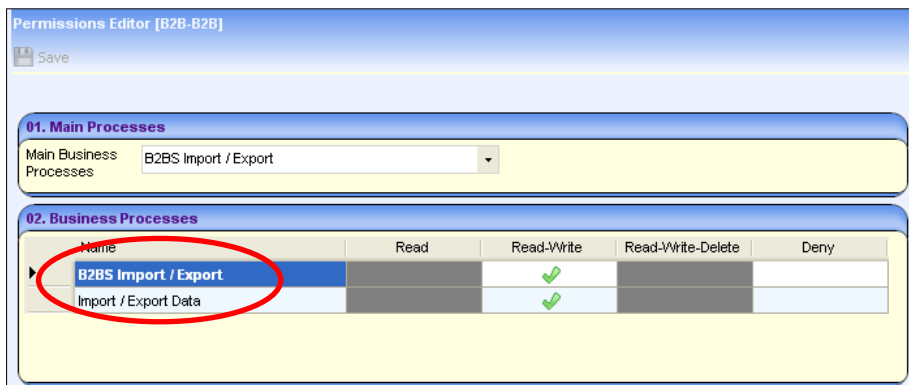
Every Base that is to exchange data via v4 B2B: Student should have the **B2B:Student Base** check box selected in v4 client **Base Details**. For 3.49, a new group, **B2BS Schools**, has been created; a new script has also been created that will put any Bases with the v4 **B2B:Student Base** flag set (in **Bases** in v4 Client) to 'ticked' in this **B2BS Schools** group and any Schools set in this group will be given **Read-Write** permissions automatically for the **B2BS Import/Export** and **Import/Export Data** processes when the upgrade for One 3.49 is applied.

NOTE: These processes now include the **WCFB2BService** permission which was previously linked to the **LA Scheduled Tasks** process.



Select the **B2B Import/Export** option for the **Main Business Processes** field and set the permissions for the following as **Read-Write**:

- **B2BS Import/Export**
- **Import/Export Data**



NOTES: You should add your schools in the **B2B:Student Schools** and ensure that all your schools are part of this group and then set the appropriate permissions for them.

If you do not set this permission for you **B2B:Student Schools**, then your schools will not be able to import data from your One system or export data to your One system or be able to test the connection.

Assigning Permissions for B2B: Student

Local Authorities will be able to define additional User Rights when they want to use B2B:Student v4.

They will be able to control access to the main menu routes in B2B:Student, the sub menu routes and then use individual Permissions to determine access to the pages and processes that can be invoked in B2B:Student.

B2B:Student v4 User Rights are assigned within v4 Tools | Permissions | User Group Processes using the existing Permissions functionality in V4 Client.

Permissions in V4 are set for a User Group and will therefore apply to all Users that belong to that User Group.

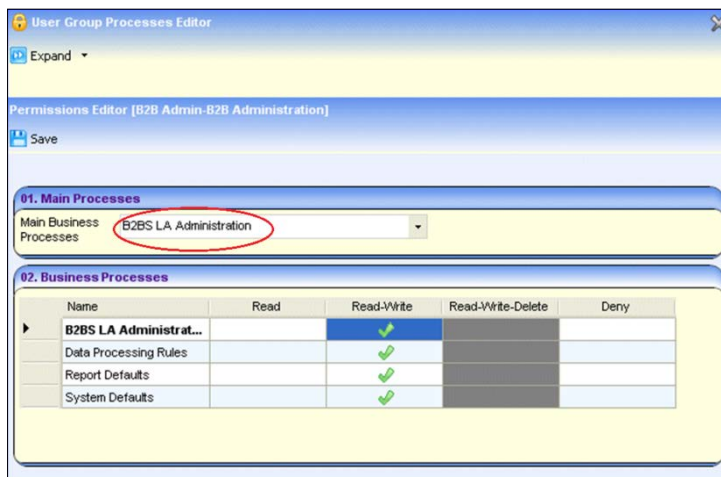
There are four Permissions that can be set for a user group:-

- **Read** – if this permission is set, access to that area will be permitted and all the information will be displayed as read-only.
- **Read-Write** – if this permission is set, access to that area will be permitted and it will be possible to read and update data within that area. For example, it will be possible to ‘Match’ Unmatched Students in the Incoming Students area; it will be possible to ‘Accept’ incoming data in the ‘Matched with Conflicts’ area etc.
- **Read-Write-Delete** - if this permission is set access to that area will be permitted and it will be possible to read, update and delete data within i.e. ‘Delete’ information from the Error Log area or Discard data from the ‘Matched with Conflicts’ etc.
- **Deny** – if this permission is set then access to that particular area will be denied.

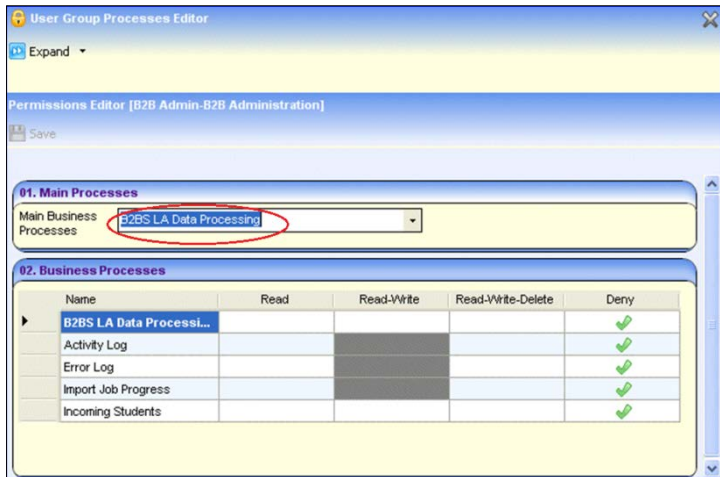
Main Menu Tabs

There are two new main Business Processes that have been created for B2B:Student V4:-

- **B2BS LA Administration** - this controls access to the **Setup** main tab



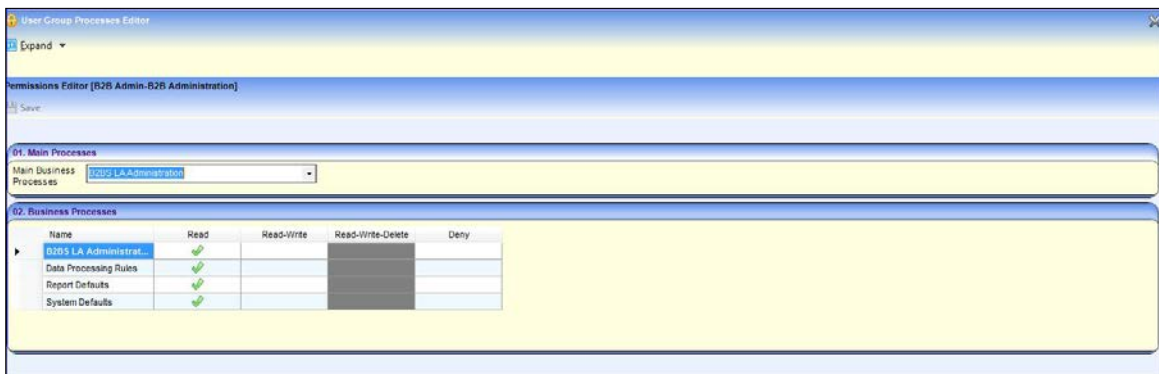
- **B2BS LA Data Processing** - this controls access to the **Data Transfer** main tab



These main business processes can be used to control access into B2B:Student. For example if you did not wish Users in a particular User Group to have any access to B2B:Student, then you would set the **Deny** Permission to both the main Business Processes. This would result in B2B:Student not being available from the One Online Home page.

*Please note that when you switch over your first Base to use B2B:Student v4, the Permissions for all the B2B:Student User Group Business Processes will be set to **Deny** by default for all User Groups. Setting the required Permissions for your B2B:Student Users will therefore be required as part of your setup process*

However if for example you wished a User Group to be able to access the **Setup** pages only in B2B:Student, then you will need to set the Permission on the **B2BS LA Administration** main business process to one of **Read**, **Read-Write** or **Read-Write-Delete** and set the Permission on the **B2BS LA Data Processing** main business process to **Deny**.



This would enable the **B2B:Student** button on the One Online Home Page and when clicked would take the user to the **Setup** Main Tab in B2B:Student. Note that the **Data Transfer** main tab is not available for access.

Sub Menu Tabs

You can control access to the sub-tabs within each main tab in B2B:Student by setting Permissions on the lower level Business Processes belonging to each main Business Process in V4 Client Permissions.

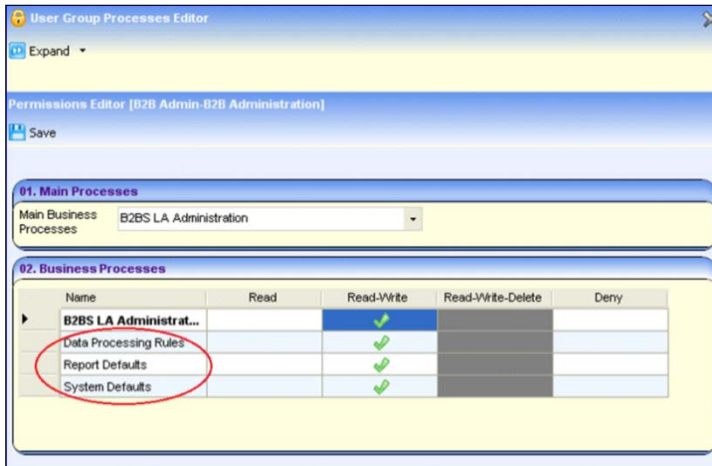
The lower level Business Processes are defined as follows:-

B2B: Student Setup

B2BS LA Administration

Setup:

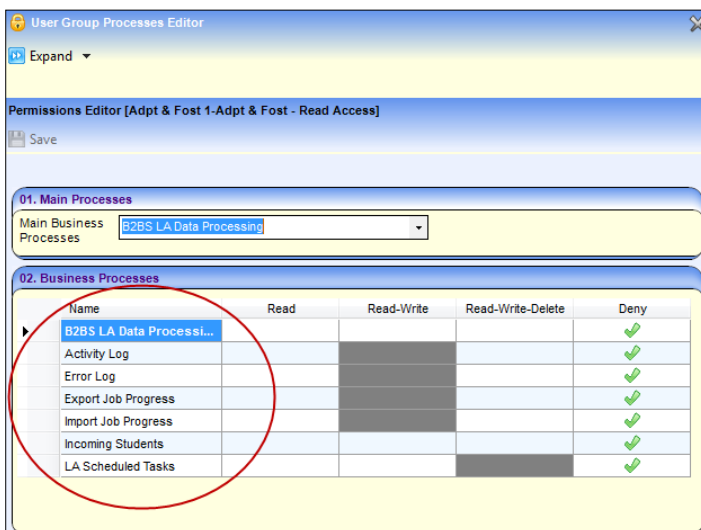
- Data Processing Rules
- Report Defaults
- System Defaults.



B2BS LA Data Processing

Data Transfer:

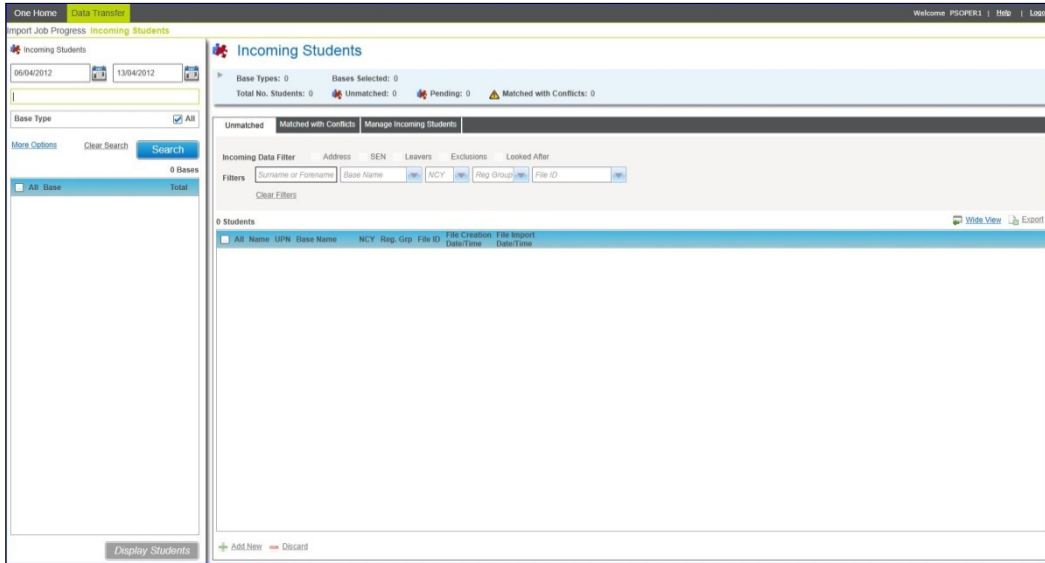
- Activity Log
- Error Log
- Import Job Progress
- Incoming Students
- LA Scheduled Tasks



For example, if you wish to give a User Group access to the **Import Job Progress** and **Incoming Students** sub-tabs only in B2B:Student, you would typically set the following Permissions against the lower level Business Processes within **B2BS LA Data Processing** in V4 Permissions:-



This would give Users within the user group access to the main tabs and sub-tabs in B2B:Student as shown below:-

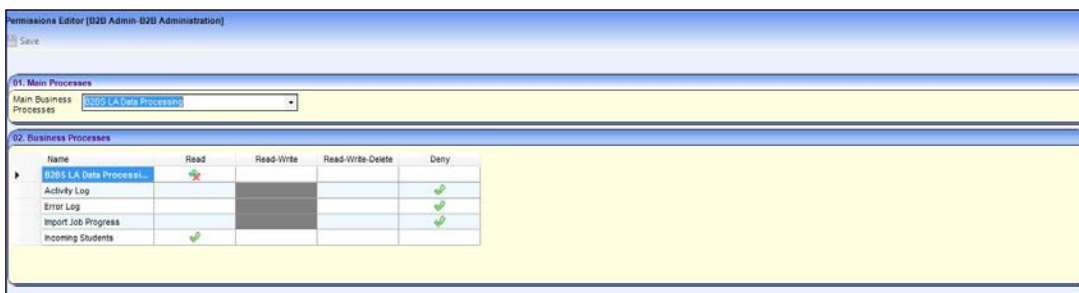


Access within each Sub Menu Tab

Once access to a sub-tab has been granted to the user group, you can control which actions can be invoked by the users within that sub-tab.

This is done by selecting the individual permissions settings of **Read**, **Read-Write**, and **Read-Write-Delete** against the Business Processes of B2B:Student

For example if you wanted a user group to view the pages contained under the **Incoming Students** sub-tab only, then you would set the following permissions:



Your users would then be able to access the **Incoming Students** sub-tab on a read-only basis as shown below:

B2B: Student Setup

The screenshot shows the 'Incoming Students' interface. At the top, there's a navigation bar with 'Data Transfer' highlighted. Below it, there are tabs for 'Incoming Students', 'Error Log', and 'Export Job Progress'. The main area is titled 'Incoming Students' and shows a summary: 'Total No. Students: 2056', 'Unmatched: 30', 'Pending: 4', and 'Matched with Conflicts: 2022'. There are tabs for 'Unmatched', 'Matched with Conflicts', and 'Manage Incoming Students'. The 'Matched with Conflicts' tab is selected. Below the tabs, there are filters for 'Incoming Data Filter' (Address, SEN, Leavers, Exclusions, Looked After) and 'Filters' (Surname or Forename, Base Name, NCY, Reg. Grp, File ID). A table of 30 students is displayed, with columns for 'All', 'Name', 'UPN', 'Base Name', 'NCY', 'Reg. Grp', 'File ID', 'File Creation Date/Time', and 'File ID'. The table lists various students with their details, including names like 'Aron, Felix' and 'Barnes, Alexander'.

The users in this user group would be able to specify search criteria, run searches and in this example view the list of unmatched students and the list of matched students with conflicts. However any buttons normally available to invoke actions from this area (Add, Discard, Match in this example) are not available because of the **Read** permission set.

In this instance your users will also be able to click on the **Matched with Conflicts** tab and display the conflicts for each student listed, but will not be able to apply any actions against those conflicts.

Similarly, if you wanted your users to be able to create and update but not delete records in the **Incoming Students** sub-tab then you would typically set the permissions similarly to the example below:

Name	Read	Read-Write	Read-Write-Delete	Deny
B2B LA Data Process...				
Activity Log				✓
Error Log				✓
Import Job Progress				✓
Incoming Students	✓		✗	

This would give your users access to add but not delete unmatched students:

B2B: Student Setup

The screenshot shows the 'Incoming Students' management interface. On the left, there are search filters for dates (06/09/2010 to 17/10/2012) and a search box containing 'archana'. Below this is a table with 1 base listed: 'Archana Base' with 2056 total students, 30 unmatched, 4 pending, and 2022 matched with conflicts. The main area displays a table of 30 students with columns for Name, UPN, Base Name, NCY, Reg. Grp, File ID, File Creation Date/Time, and File Last Date/T. A 'Match' button is visible at the bottom right.

It would also give them access to **Accept** and **Reject**, but not **Discard** Data Items for a Student in **Manage Data Conflicts**:

The screenshot shows the 'Manage Data Conflicts' interface for a student. It displays conflicting items for 'Given Name' and 'Family Name'. For 'Given Name', the conflict is between 'historyT' (Incoming Record) and 'School' (One Record). For 'Family Name', the conflict is between 'schoolL' (Incoming Record) and 'School' (One Record). Each conflict has 'Accept' and 'Reject' checkboxes. The interface also shows a sidebar with various record categories like Identifiers, Basic Details, Address, etc. Buttons for 'Accept All Latest', 'Cancel/Reset', and 'Apply' are at the bottom.

Permissions and the Default Landing Page in B2B:Student

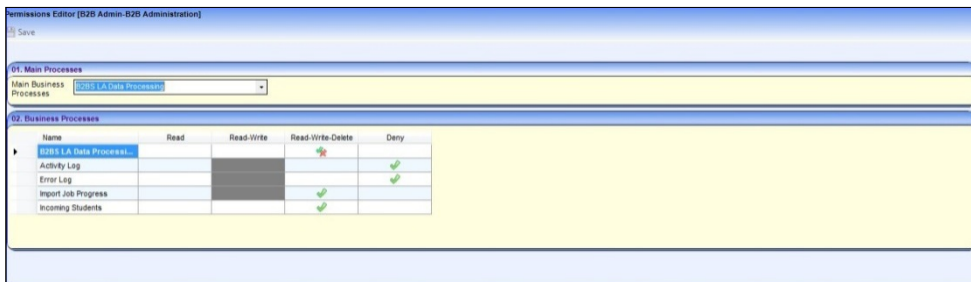
When **B2B:Student** is selected from the One Online Home Page, there is a priority order in which first screen/tab in B2B:Student is displayed. The priority of the screen/tab that will be first displayed is dependent upon the Permissions that have been set for the User Group that the logged on user belongs to. Please see the *Default Landing Page* section below for the priority order in which the first screen/tab to be displayed.

This is best illustrated by the following example:

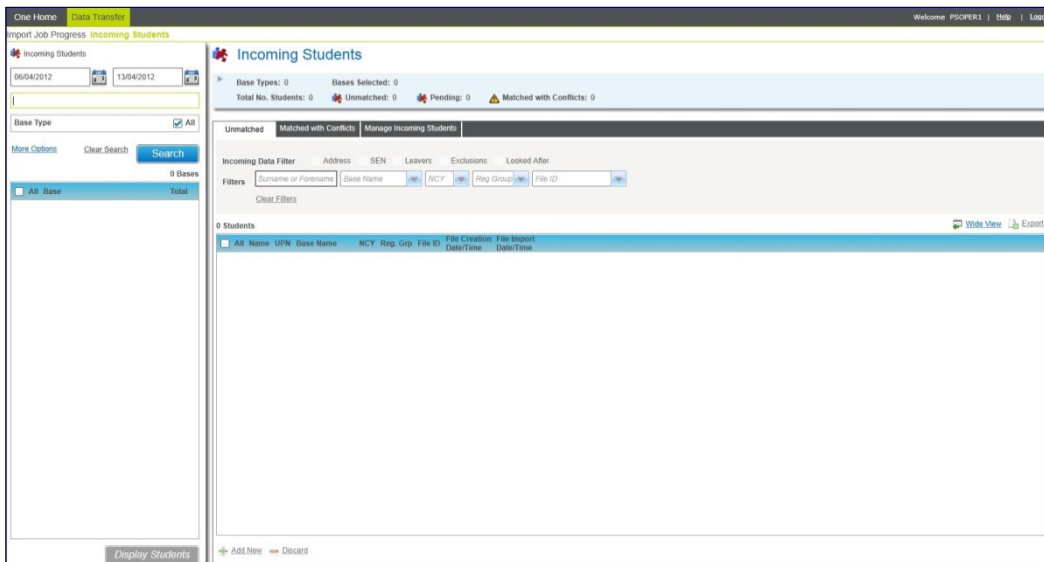
The User Group has the **B2BS LA Data Processing** main Business Process set to one of **Read, Read-Write** or **Read-Write-Delete** and the **B2BS LA Administration** main Business Process set to **Deny**.

Therefore when a user belonging to that User Group signs onto One Online, they will have access to the **B2B:Student** button on the One Online Homepage. Upon clicking on that button, they will be taken to the **Data Transfer** main tab with the **Activity Log – Summary** screen displayed by default. However they will not have access to the **Setup** main tab as this tab will not be displayed for the user.

Within the B2BS LA Data Processing main Business Process, the following Permissions have been set against the ‘sub’ Business Processes:-



Thus, when a user clicks into B2B:Student, the following page will be displayed:



The Data Transfer main tab is highlighted and the Incoming Students sub-tab is displayed by default. Note that the other sub-tabs under Data Transfer (Activity Log, Error Log) or the Setup main tab are not available to the user in this instance.

Set up Permissions for the tabs in the Manage Data Conflicts area

Tools | Permissions | User Group Processes

Select the **B2BS Conflict Management** option for the **Main Business Processes** field; the system will display the following screen. All the tabs which are available in the **Manage Data Conflicts** screen will be displayed here.

Name	Read	Read-Write	Read-Write-Delete	Deny
B2BS Conflict Managem...			✓	
Address			✓	
Basic Details			✓	
Carers			✓	
Ethnicity			✓	
Exclusions			✓	
Family			✓	
FSM			✓	
FSM Claims By Student	✓			
Identifiers			✓	
Looked After			✓	
School History			✓	
SEN Needs			✓	

For each of the tabs it will be possible for you to assign users specific permissions for accessing these and permissions for whether they will be able to view data, process the data by accepting, rejecting and discarding the incoming data that is visible in for the following tabs:

- Address
- Basic Details
- Carers
- Ethnicity
- Exclusions
- Family
- FSM
- Identifiers
- Looked After
- School History
- SEN Needs

The relevant tabs will be accessible to the user in the Manage Data Conflicts area depending on the rights that have been defined for the tabs; the permissions are as follows:

- **Read** – this means that the user will be able to view the data in the conflict in the relevant tab but the user will not be able to process any data.
- **Read-Write** – this means that the user will be able to view the data in conflict in the relevant tab; the user will also be able to **Accept** and **Reject** the incoming data.

- **Read-Write-Delete** – this means that the user will be able to view the data in conflict in the relevant tab; the user will also be able to **Accept**, **Reject** and **Discard** the incoming data.
- **Deny** – this means that the user will be denied access to the relevant tab.

NOTE: For users that do not have permission to any tabs or if they have permissions to a tab or tabs where there is no data in conflict then the link for the Student record in the **Matched with Conflicts** area of the **Incoming Students** screen will be disabled.

Set up permissions for importing B2B attainment data

Tools | Permissions | User Group Processes

In order to use the B2B attainment import functionality, the username and password of a user with the appropriate data importing permissions must be entered into the **Application Server Settings** panel of the **Integration Service** tab of the CCSConfig utility.

The user must be a member of a group with the permissions displayed in the following image. In the v4 permissions area, select **Data Importing** from the **Main Business Process** drop-down to display the **Business Processes** panel. At a minimum, the group must have Read-Write permissions for the **Results** and **Student Details** business processes.

01. Main Processes				
Main Business Processes	Data Importing			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
▶ Data Importing				
CTF Importing				
Early Years Enquiries				
ISPP Details				
Results				
School Census				
Service Providers				
Student Details				
UDF Values				

Permissions Relationships between B2B:Student and Other Areas of One

Other Business Processes

In order for certain processes within B2B:Student to be carried out, there may be a requirement for Permissions to be set against other non-B2B:Student specific Business Processes in One.

For example, in order to manually match an Unmatched Student in B2B: Student with an existing Student in One, the User group must have the **Read** Permissions set to the following Business Processes (*main/sub*):

- **Person Administration | Person Details**
- **Student Data | Core Data**

Admissions & Transfers

The A&T Business Process “Manage Import of Online Applications” has a relationship with the B2B Business Process “Incoming Students”.

That is if one is set to Read-Write then the minimum the other can be is a partial Read-Write. This only becomes confusing in the following situation (this can work either way round):

1. **A&T:** Set up “Manage Import of Online Applications” to Read-Write.

01. Main Processes				
Main Business Processes	Admissions Manage Import of Online Applications			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
Admissions Manage Import of Online Applic...		✓		
Manage Import of Online Applications		✓		

2. **B2B:S:** Attempt to set and Save “Incoming Students” to Read.

01. Main Processes				
Main Business Processes	B2BS LA Data Processing			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
B2BS LA Data Processi...		✗		
Activity Log				✓
Error Log				✓
Import Job Progress				✓
Incoming Students	✓			

When an attempt is made to save the setting the following message will be displayed:

Invalid Request(s)

Incoming Students: You cannot set this process as selected, because this will invalidate the following processes available to the User Group: Manage Import of Online Applications.

If you continue the system will:

1. Save the changed business processes that do not cause conflict.
2. Set the Remaining processes change Request(s) to the minimum so that the Other Affected Processes Are Not Invalidated.

Do You Wish to Continue?

Selecting **Yes** to continue will change the permission to a partial Read-Write:

01. Main Processes				
Main Business Processes	B2BS LA Data Processing			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
B2BS LA Data Processi...		✗		
Activity Log				✓
Error Log				✓
Import Job Progress				✓
Incoming Students		✗		

In the above scenario B2B will have Read only and A&T Read-Write.

Access Control Lists (ACLs)

Any ACLs that have been defined against a Person Details record in v4 for a User, Post, User Group or Service Team is respected in B2B: Student. Although it is not possible to define an ACL against a Student from the Student Details record, it is possible to set an ACL against a Student using the Person Details record for the Student.

The ACL settings that can be defined against a Person Details record (**Allow** or **Deny** on 1 or more of **Read Summary**, **Read Detail**, **Write**) will have an impact on both what One Student or One Person data the logged user will be able to see in B2B:Student and also what actions they will be able to undertake against that One Student or One Person data in B2B:Student. This affects the following areas in B2B:Student:

Students

- **Incoming Students | Unmatched** tab | **Match** button | **Possible Matches** modal window | **Search** button
- **Incoming Students | Matched with Conflicts** tab | **Manage Data Conflicts** hyperlink

Carers

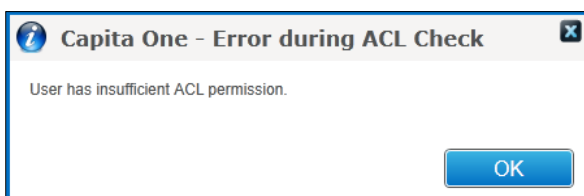
- **Incoming Students | Matched with Conflicts** tab | **Manage Data Conflicts** hyperlink | **Carers** tab | **Unmatched (Carers)**
- **Incoming Students | Matched with Conflicts** tab | **Manage Data Conflicts** hyperlink | **Carers** tab | **Matched (Carers) with Conflicts**

This is best illustrated by the following examples:

- Logged on user has the following ACL defined against a Student in V4 Client:

Read Summary (Allow), Read Detail (Allow), Write (Deny)

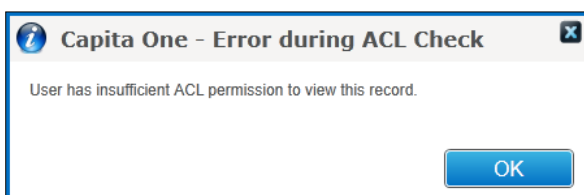
These ACL definitions will allow the logged on user to view the summary line of the Student returned in the Possible Matches search results window and also details of that Student via the hyperlink. However they will not be able to select that One to match with the Unmatched Student in B2B: Student; if they attempt to do so, they will receive a message similar to the following:



- Logged on user has the following ACL defined against a Student in V4 Client:

Read Summary (Allow), Read Detail (Deny), Write (Deny)

These ACL definitions will allow the logged on user to view the summary line of the Student returned in the Possible Matches search results window. However they will not be able to view details of that Student via the hyperlink nor will they be able to select that One Student to match with the Unmatched Student in B2B: Student. If they attempt to click on the hyperlink, they will receive a message similar to the following:

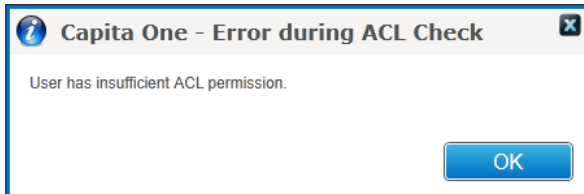


- Logged on user has the following ACL defined against a Student in V4 Client:

Read Summary (Deny), Read Detail (Deny), Write (Deny)

These ACL definitions will not allow the logged on user to see any information about the Student in One as the Student will not be returned in any search results list.

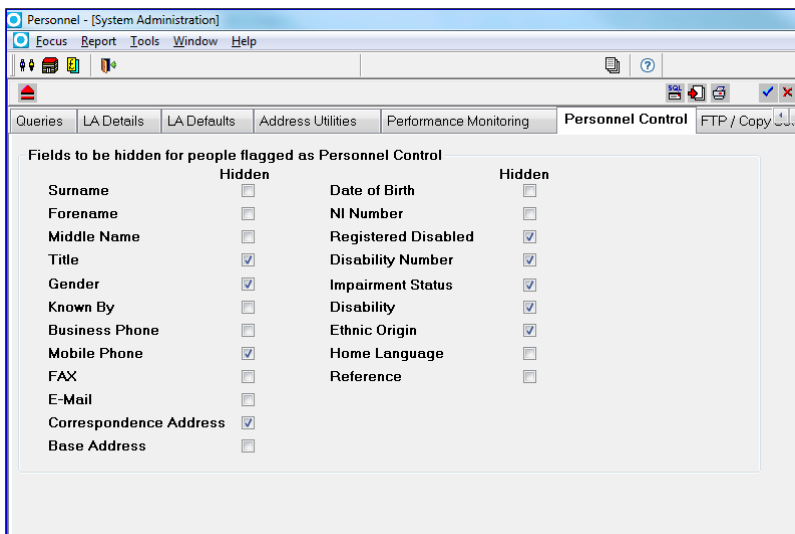
*Note that in all 3 examples above with an ACL **Write** defined set to **Deny**, the logged on user will not be able to access the Manage Data Conflicts area.*



Similar rules apply to any ACLs that are applied to a Person Details record for a Person who is a Carer for the Student in One. Additionally if the **Write** ACL against that Person Details is set to **Deny**, the logged on user will not be able to see any of the Carer Details in the One Panel within the Manage Data Conflicts screen when resolving other Conflicts for the Student.

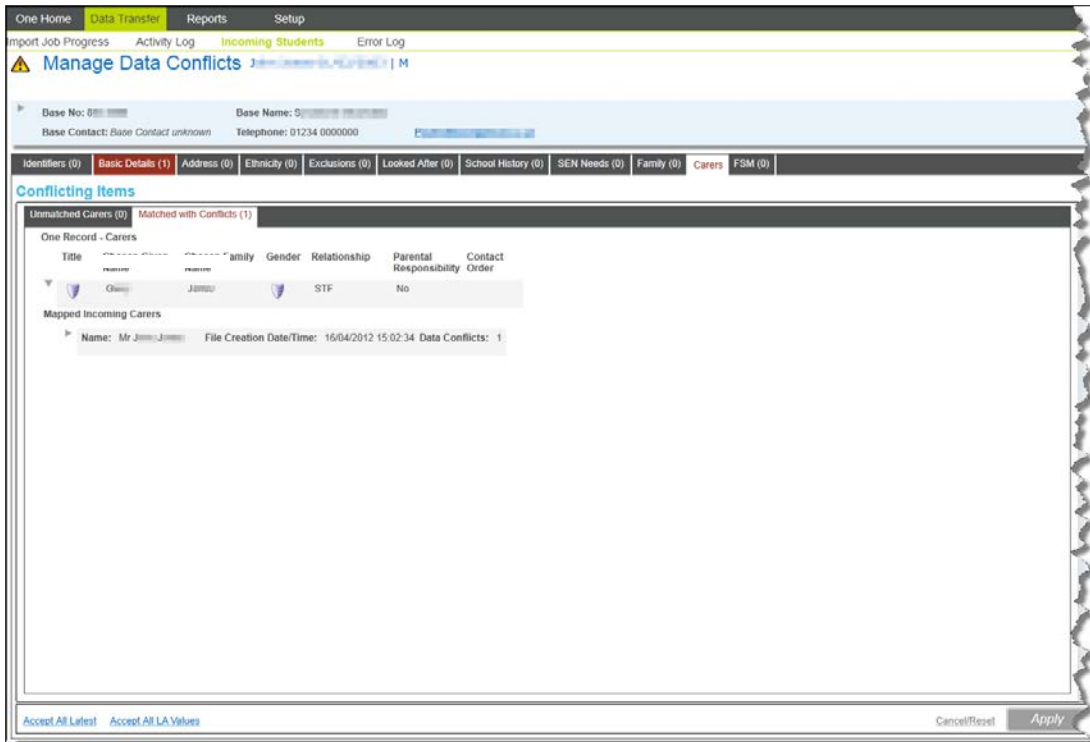
Data Shielding

If a Person who is also a Carer for a Student in One is maintained within the One Personnel Module as an Employee under Personnel Control, any Personnel Control Data Shielding settings will apply whenever that Person Data is displayed in B2B:Student.



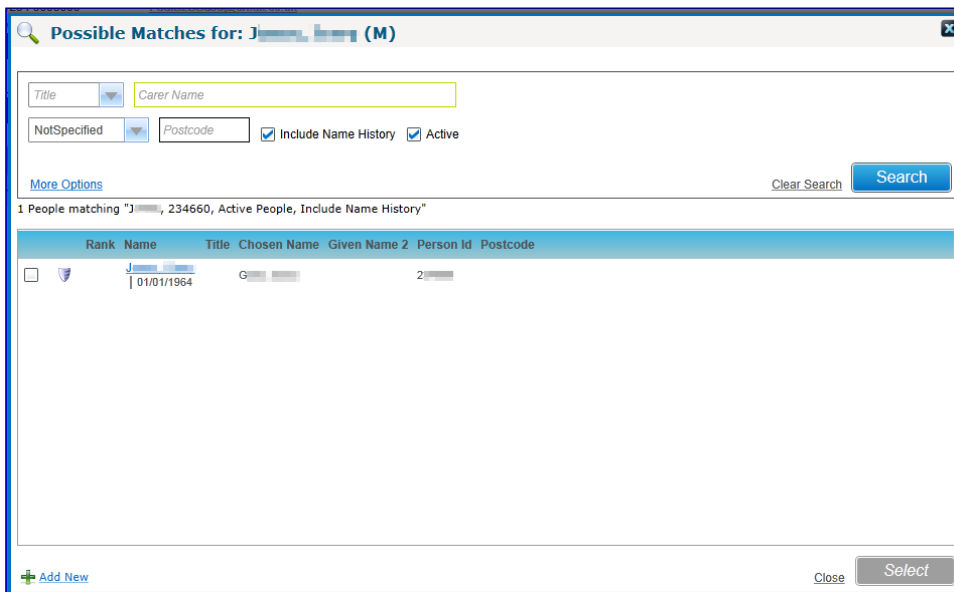
This affects the following areas in B2B:Student:

- Incoming Students | Matched with Conflicts | Name (Click on link in name column) | Carers | Matched with Conflicts

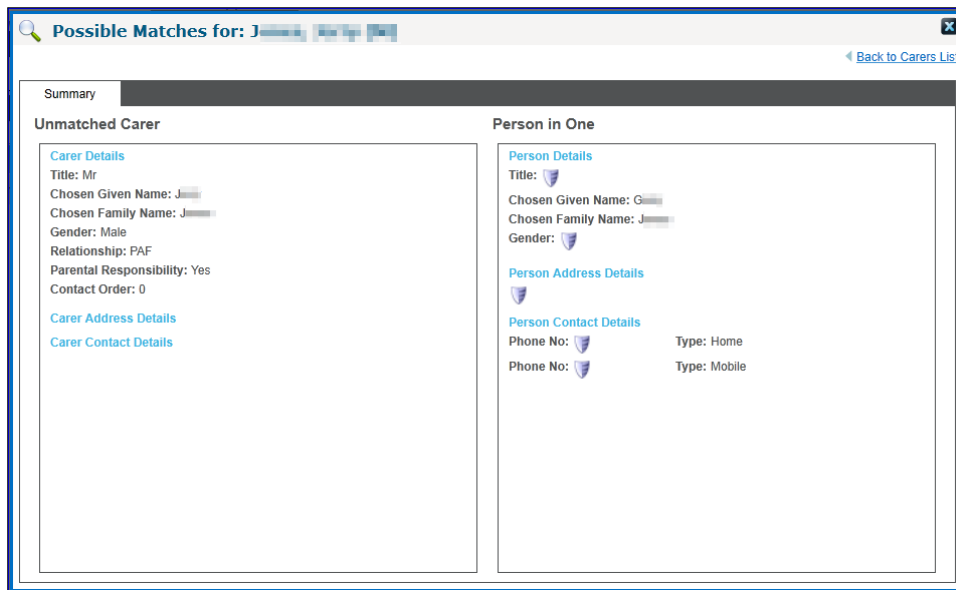


- Incoming Students | Matched with Conflicts | Name (Click on link in name column) | Carers | Unmatched Carers | Match button | Possible Matches

An icon will be displayed against the Person listed to indicate that one or more details of the Person may be shielded.



When the user clicks the hyperlink to display details of the Incoming Carer and One Carer side by side, an icon will be displayed against those items that are shielded.



Windows permissions for the B2B attainment import and suspense folders

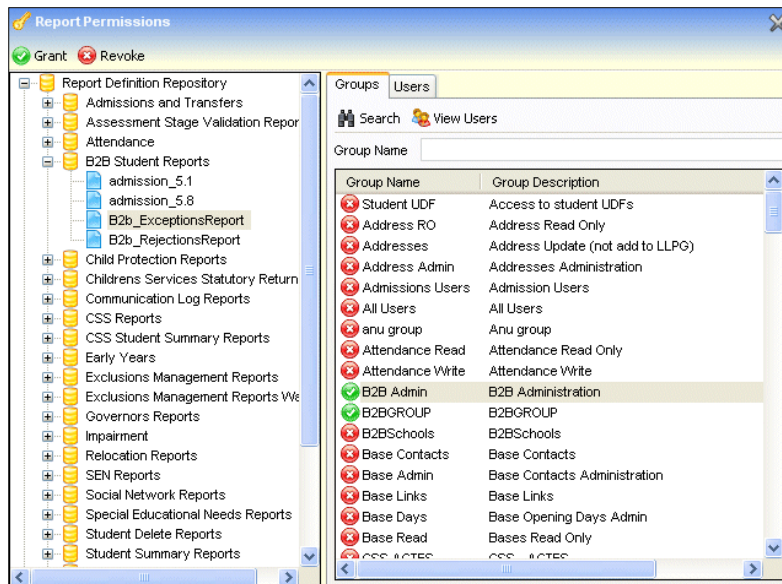
The B2B attainment functionality requires access to a network share to which B2B can write the imported attainment data and any associated suspense files. Therefore, the account under which the application server runs requires read-write-delete access to the shared location. Typically, this would be the NetworkService user account. Additionally, if users will be manually importing data using Pulse (instead of using the automated import option in the scheduled task), then their Windows user accounts must also have read-write-delete access to the shared location.

For more information on assigning folder permissions in Windows, refer to the *Set, View, Change, or Remove Permissions on Files and Folders* article available from Microsoft.com.

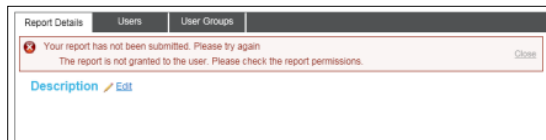
Report Permissions

Permissions | Report Permissions

You will need to set up the appropriate permissions for users or groups that you wish to have access to and run the Exceptions and Rejections Reports which will be displayed under **B2B Student Reports**.



If the appropriate permissions are not set for you then you when you try and run the Exceptions and Rejections Reports the system will display a message informing you that you do not have the appropriate permissions.



Setting up Bases as B2B: Student Bases

NOTE: As Local Authorities will be able to migrate their Schools one at a time or migrate a group of Schools, those Local Authorities that wish to start using B2B:Student v4 for their Schools must set the **B2B Student Base** flag to 'ticked' for those Schools in the **Bases** area in One v4 Client. This will ensure that for those Schools sending B2B:Student files that are set to 'ticked' for the B2B Student Base will be placed in the One v4 Online screens. It will be possible for Local Authorities to run imports for Schools using B2B:Student v3 and B2B:Student v4 in parallel; however the same School cannot be set as using both B2B:Student v3 and B2B:Student v4.

If a Base is set as **XML Transfer Base** in v3 and set as a B2B Student Base in v4 then the import mechanism for that Base will use B2B:Student v4. It is advised that Local Authorities 'untick' the **XML Transfer Base** in v3 and 'tick' the **B2B Student Base** in v4.

Before you migrate the School to use v4 B2B:Student you must clear all the data from your Suspense screens in v3 XML Data Exchange.

Every Base that is to exchange data through B2B: Student should have the **B2B Student Base** checkbox ticked. This is shown in v4 client **Base Details**.

B2B: Student Setup

The screenshot shows a form titled '1. Basic Details' for 'Sycamore Secondary'. The form includes fields for Name, Official Base Name, Base Type (set to 'Sec without 6th form'), Control, URL, URN, Inactive Date, and Inactive Reason. The 'Active' checkbox is checked. The 'Send To Contact Point' checkbox is unchecked. The 'B2B Student Base' checkbox is checked and circled in red.

With this checked, that Base is enabled to run B2B: Student. If this checkbox is not checked for a Base then any data received from this Base will not be accepted. Therefore to ensure that a Base can run B2B: Student v4 the user will need to ensure that this checkbox is checked.

NOTE: If for any reason a Local Authority wishes to go back to using B2B:Student v3 for a Base or Bases then they will need to 'untick' the B2B Student Base in v4 and 'tick' the XML Transfer Base checkbox for those Bases. The next time that School sends a file it will be imported through B2B:Student v3 and details of any imports will be visible in the XML Data Exchange area.

Upon checking of the B2B:Student Base flag for the Base in focus, you will be able to select a User ID which will be used to identify that the updated information for a Student in One came from B2B:Student.

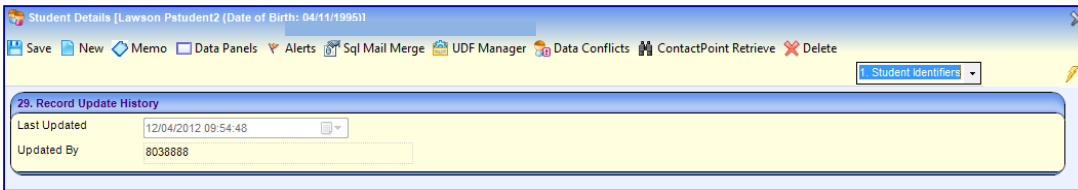
A modal window will open presenting you with a list of active Users IDs, from which you will be able to select a suitable User ID for identification of these updates.

The screenshot shows a modal window titled 'Users (Sycamore Secondary)'. It contains a search bar and a table of users. The 'Paul B2B Base User' is highlighted in blue.

User Name	Description	Mapped To Base	B2BS User
8038888	Paul B2B Base User	Yes	Yes
8039988	8039988	No	No
AB1		No	No
AB11		No	No
AB14		No	No
AB4		No	No
AB9		No	No
AC10		No	No
AC6		No	No
ACI		No	No
ACI2		No	No
ACK		No	No
ACY		No	No
ADI		No	No
AEH		No	No
AET		No	No
AF4		No	No
AH1		No	No
AH4		No	No
AH8		No	No
AHN		No	No
AK5		No	No
AL2		No	No
AMW		No	No
AMYB		No	No

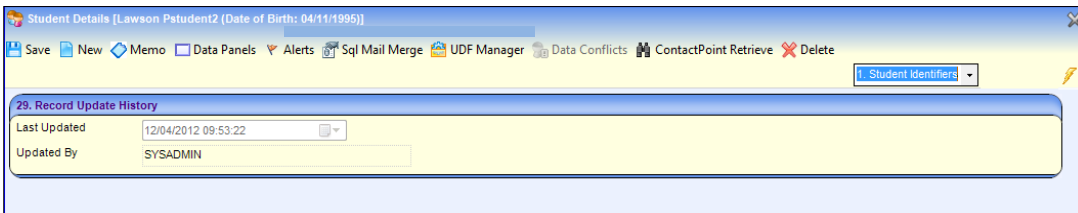
Upon the highlighting and selection of the required user, the system will map this user to the Base in focus and will mark this user as a B2B:Student user.

For subsequent automatic updates from an Import of Student data using B2B:Student, the selected User ID will populate the Last Updated field in V4:-



This will enable you to identify that an update to the Student Data in One was done as a result of an automatic import.

If the update was done by accepting an Incoming value from the **Matched Data Conflicts** area in B2B:Student, the **Last Updated** field in V4 would be populated by the User currently logged on:



It is suggested that the existing School User id you have set up in One for B2B:Student is selected to identify updates from B2B:Student, but an alternative User ID can be selected if required.

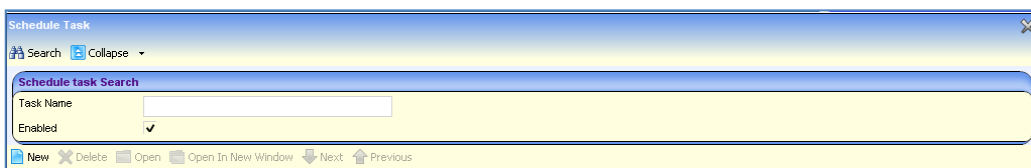
NOTE: This screen will only allow you to select an existing One User ID; maintenance of One User IDs will continue to be available through System Administration in v3.

Setting up Scheduled Task for Clearing out Conflicts

NOTE: To help resolve data conflicts, One displays incoming data that conflicts with data already in the database in the **Manage Data Conflicts** screen. Currently, if a user changes the data in One to match that of the incoming data but the conflict has not been resolved via the **Manage Data Conflicts** screen, then the data is still displayed as in conflict.

A new process has been created as a Schedule Task in the v4 Client that clears out any conflicts where the data in One is changed so that it is the same as the data in the **Manage Data Conflict** screen.

1. In the v4 Client, select **Tools | Administration | Schedule Task** to display the **Schedule Task** page.



2. Click the **New** button to display the **Schedule Task** screen. Enter an appropriate **Name** and **Description**.

B2B: Student Setup

Schedule Task []

Save New

01. General 02. Trigger 03. Actions 04. Next 10 sched... 05. History

01. General

01. General

Name: Clearing Conflicts where data is the same

Description: This process will clear out any conflicts from the Manage Data Conflicts screen for any data that is updated in ONE so that the value held in ONE is the same as the incoming value and therefore the data is no longer in conflict and therefore needs to be removed.

If the task is already running, then the following rule applies: Queue a new instance

Logging level: Unspecified Enabled

Application Server: Application Server 1

Author Name: []

Created on: []

Updated By: []

Last Updated: []

NOTE: The above is an example of what you can define for the **Name** and **Description** fields for this schedule task.

- Click the **Add** button in the **Trigger** panel.

02. Trigger

Type	Start	End	Details

Add Edit Remove

One displays the **Trigger** dialog that enables you to enter the day, time and frequency of when you wish this Schedule Task to run. Click the **OK** button to save the schedule information. Alternatively, click the **Cancel** button if you do not wish to save the changes that you have made or if you wish to close this dialog.

Trigger : One Time

Ok Cancel

One time Daily Weekly Monthly Monthly Days of the Week

Start: 17/09/2012 16:01:34 Recur every: 1 days

Months: January February March April May June July August September October November December

Days: 1 6 11 16 21 26 31 2 7 12 17 22 27 Last 3 8 13 18 23 28 4 9 14 19 24 29 5 10 15 20 25 30

nth Day of the week for the Month: First Second Third Fourth Last

Day of the week: Sunday Monday Tuesday Wednesday Thursday Friday Saturday

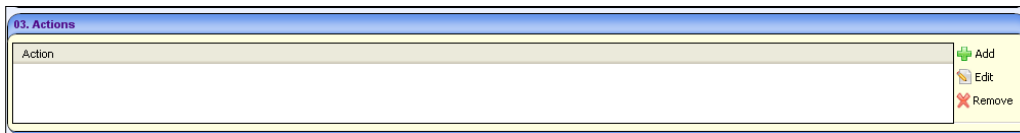
Advanced settings: Repeat task every 1 hour for a duration of 1 day

Expire: []

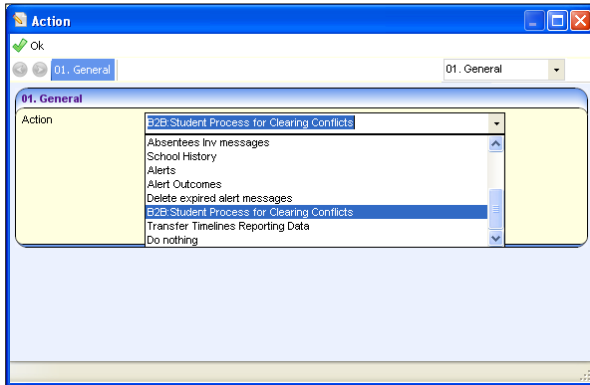
At 16:01 - Trigger starts on 17/09/2012, and expires on 17/09/2012 at 16:01:34.

NOTE: The Schedule Task will run on the day and time for the frequency that you have defined in the trigger and at the day, time and frequency that has been specified in the Schedule Task and a process will be run which will clear out any conflicts where the data in One is/was changed by a user so the data is the same as the incoming data.

- To complete the setup of the Schedule Task click the **Add** button in the **Actions** panel.



One displays the **Action** dialog.



- Select **B2B:Student Process for Clearing Conflicts** from the **Action** drop down.
- Click the **Save** button to save the Schedule Task.

NOTES: After the Schedule Task has cleared out the conflicts, if there are other conflicts in the relevant tabs, it will retain those conflicts and keep those tabs highlighted in **red**. If there are no remaining conflicts, then the tabs will not display any data.

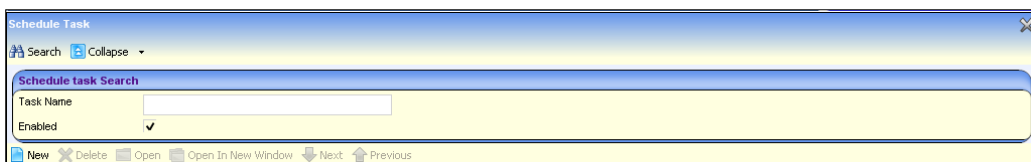
Any other conflicts for other tabs where the incoming data is different to the data held in One for the Student will continue to display this information in the relevant tabs and will not be cleared.

If the Schedule Task has cleared out conflicts and the Student does not have any other conflicts, then the Student record will be removed from the **Matched with Conflicts** tab in the **Incoming Students** area.

Setting up a Scheduled Task for Deleting Files

When WCF is used to transfer data via B2B:Student, there are no files created in SIMS. However, if data is exported from and imported into Schools, files are stored in One. A Scheduled Task can be created in One v4 client to enable LAs to delete these files automatically.

- In the v4 Client, select **Tools | Administration | Schedule Task** to display the **Schedule Task** page.



- Click the **New** button to display a blank **General** panel.
- Enter an appropriate **Name** and **Description**.

B2B: Student Setup

The screenshot shows a configuration window titled "ScheduleTask [B2B: delete Import and export Files]". At the top, there is a "Save" button and a navigation bar with tabs: "01. General", "02. Trigger", "03. Actions", "04. Next 10 sched...", and "05. History". The "01. General" tab is active. The main area contains the following fields:

- Name: B2B: delete Import and exportFiles
- Description: B2B: delete Import and exportFiles
- If the task is already running, then the following rule applies: Queue a new instance
- Logging level: Detailed, Enabled
- Application Server: Application Server 1
- Author Name: System Administrator
- Created on: 17/04/2013 14:28:28
- Updated By: System Administrator
- Last Updated: 17/04/2013 15:22:15

4. In the **Trigger** panel, click the **Add** button to display the **Trigger** dialog.

The screenshot shows the "02. Trigger" panel. It has a header with tabs: "Type", "Start", "End", and "Details". The main area is empty. On the right side, there are three buttons: "Add" (with a green plus icon), "Edit" (with a yellow pencil icon), and "Remove" (with a red X icon).

5. Enter the day, time and frequency of when you wish this Schedule Task to run.

Trigger : Daily

Ok Cancel

One time
 Daily
 Weekly
 Monthly
 Monthly Days of the Week

Start: 17/04/2013 19:12:00 Recur every: 1 days

Months

January
 February
 March
 April
 May
 June
 July
 August
 September
 October
 November
 December

Days

1
 6
 11
 16
 21
 26
 31
 2
 7
 12
 17
 22
 27
 Last
 3
 8
 13
 18
 23
 28
 4
 9
 14
 19
 24
 29
 5
 10
 15
 20
 25
 30

nth Day of the week for the Month

First
 Second
 Third
 Fourth
 Last

Day of the week

Sunday
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday

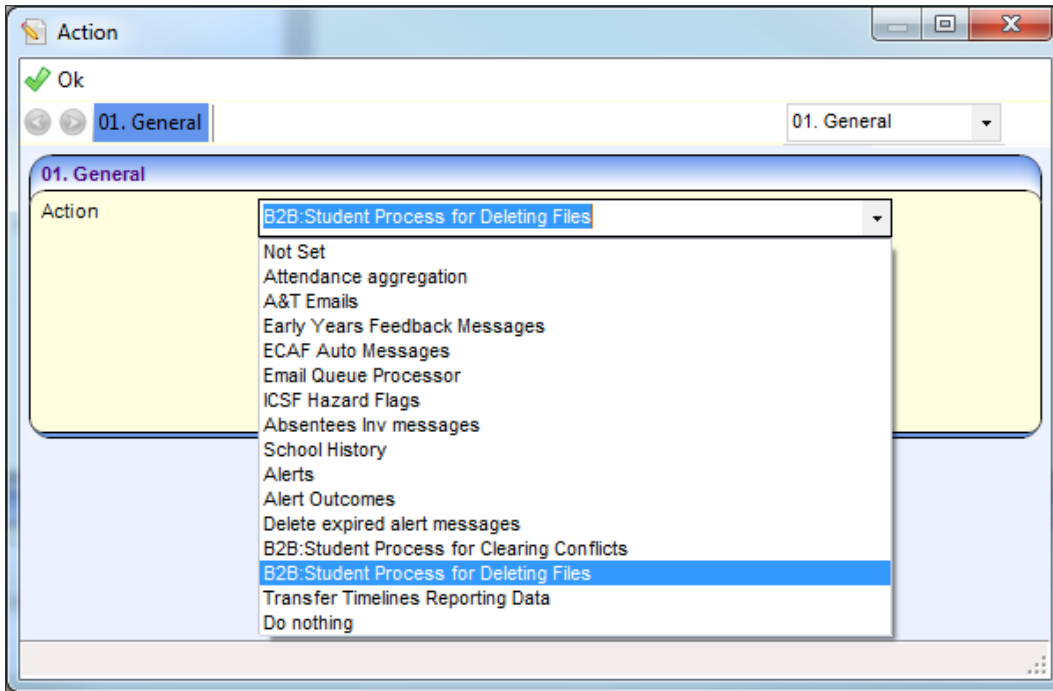
Advanced settings

Repeat task every 1 minute for a duration of 1 day

Expire

At 19:12 every day - After triggered, repeat every 1 minute for a duration of 1 day. Trigger starts on 17/04/2013, and expires on 18/04/2014 at 19:55:00.

6. Click the **OK** button to save the information.
7. Click the **Add** button in the **Actions** panel to display the **Action** dialog.



8. Select the **B2B:Student Process for Deleting Files** option from the **Action** drop-down list.
9. Click the **Save** button.

The Schedule Task will run on the day and time for the frequency that you have defined in the trigger and at the day, time and frequency that has been specified in the Schedule Task and a process will be run which will clear out any imported and exported files depending on the settings that have been defined in v4 Online via **Setup | System Defaults | Default Values**. For more information, see [Defining Default Deletion Periods](#) on page 51.

Data Processing Rules

Setup | Data Processing Rules| Data Processing Rules

This area allows you to specify how you wish the incoming Student data to be treated and processed during the **Import process** for a selected school or multiple schools.

NOTE: For those Bases that are being migrated when the B2B Student Base is 'ticked' at the point the system will copy all the Field Processing Rules that were set in **XML Data Exchange** in v3; Local Authorities will be able to edit these as they wish.

It allows you to specify which Bases you wish to set the data processing rules for by entering search criteria for Base Name, School No and/or Base Type.

NOTE: Local Authorities can search for Bases by entering partial information for the Base Name and School No.

Data Processing Rules

Base Name

School No.


Base Type All

[More Options](#) [Clear Search](#)

0 Bases


Clicking the **Clear Search** link will remove any selections or values you have entered.

Clicking the **More Options** link allows you to refine your criteria by Base Type, LA Bases, All Key Stages, URN and Clusters. By default it will only include Active bases which are flagged as B2B: Student Bases (i.e. the **B2B Student Base** checkbox in v4 is 'ticked'), but **Show Inactive** or **Show All** options are available by selecting the appropriate radio button.

Clicking the **Close** link as well as selecting  in the **More Search Options** area will close this pop up.

Clicking the **Clear Search** link will remove any selections made in the **More Search Options** area.

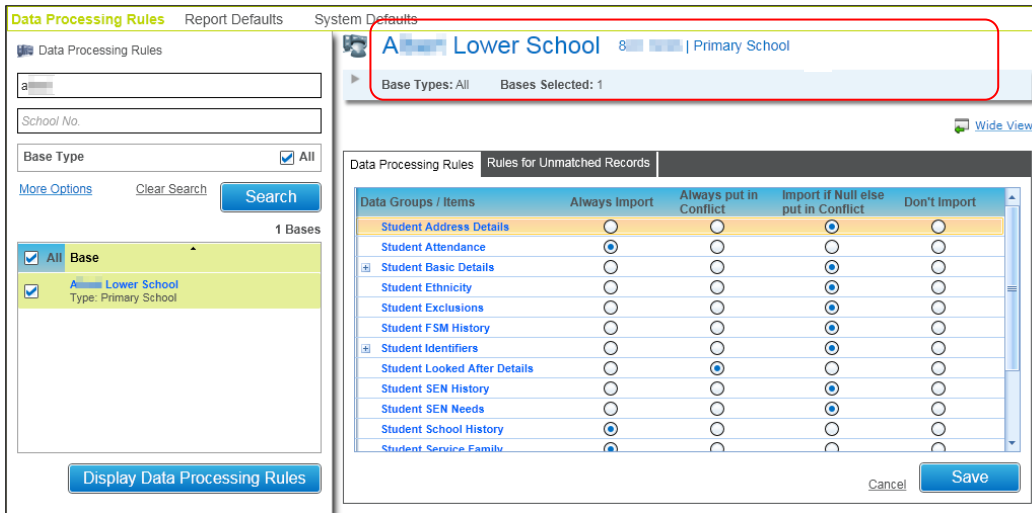
When the **Search** button is clicked, One displays the list of Bases that meet the search criteria and includes a count of the number of Bases that have been retrieved.

 *If you have not entered any search criteria when the Search button is selected this will display all the Bases set a B2B Student Base in v4.*

In order to view the Data Processing Rules for a Base you must select the check box adjacent to the required Base record and then click **Display Data Processing Rules** button. The full range of Data Group areas will be displayed in an extended tree-format (+ indicates where subsets exist and there are data items under it).

Details of the selected Base are displayed in the Header of the screen.

B2B: Student Setup



Click the **Wide View** hyperlink to see the Data Processing Rules in a wide view.

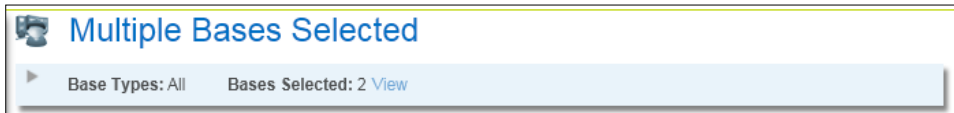
It will be possible to view the Data Processing rules that have been set for the Data Groups and Data Items for the selected Base.

When more than one Base record is selected and the **Display Data Processing Rules** button is clicked, then One displays the following message:

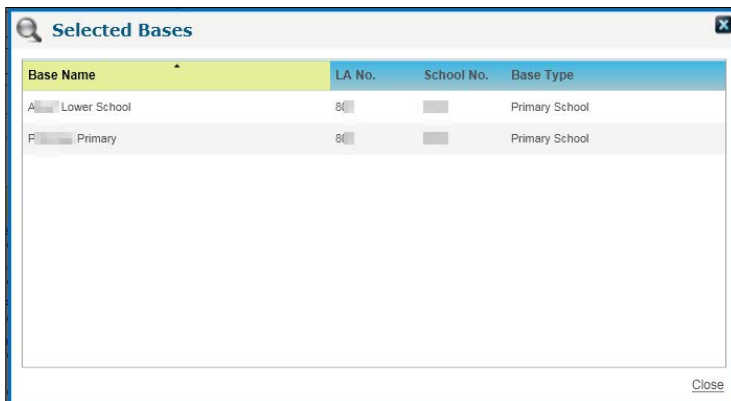
You can't view the Data Processing Rules and Unmatched Record Rules for multiple bases at the same time.

NOTE: It will not be possible for Local Authorities to view any existing Data Processing Rules that have been defined for more than one Base at the same time; although it will be possible to define the Data Processing Rules for more than one Base at the same time.

If more than one school is selected, the header of the school displays the details of the schools selected.



When you click the **View** link, One displays the **Selected Bases** pop up window to view the following details about the selected bases: **Base Name**, **LA No.**, **School No.** and **Base Type**.



Data Items Subsets

Data Processing Rules can be set against:

- **Data Group** - All the Data Items within this Data Group will have the same Data Processing Rule set. For example, **Student Exclusions**, **Start Date**, **End Date**, and **Type of Exclusion** will have the same Data Processing Rule set because these are treated as a Data Group because there is a dependency on the data.
- **Data Items** – Individual items within this Data Group could have different Data Processing Rules set. For example, each data item in the **Student Basic Details** can have different Data Processing Rules set for it.

Expansion of Data Groups with subsets: **Student Basic Details** and **Student Identifiers**.

Student Basic Details	Student Identifiers
<div style="border: 1px solid black; padding: 5px;"> <p>Data Groups / Items</p> <ul style="list-style-type: none"> [-] Student Basic Details <ul style="list-style-type: none"> Boarder Chosen Family Name Chosen Given Name Connexions Assent EAL First Language Former UPN Gifted and Talented Given Name 2 Home Language Medical Flag Mode of Travel NCY Part Time Reg Group Religion </div>	<div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> [-] Student Identifiers <ul style="list-style-type: none"> Date of Birth Family Name Gender Given Name Unique Pupil Number </div>

For each area, a data processing rule must be selected. There are four data processing rules, **Always Import**, **Always Put in Conflict**, **Import if Null else put in Conflict**, **Don't Import**.

When the Data Processing Rule is set for the **Student Identifiers** and **Student Basic Details** data groups, then the defined Data Processing Rule is flood filled for all the Data Items that exists within it. Local Authorities can select different Data Processing Rules for these Data Items.

Always Import

Incoming data will always be imported directly into One for the group (provided that all the incoming data is valid). The incoming data will overwrite the data that is held in the One, unless the same value is already held in the One, in which case the incoming data is ignored.

NOTE: In the case of an Address, it will only be imported and linked to a Student if this Address exists.

Always put in Conflict

If the incoming data is different from the data held in One, then the incoming Data Group and data items are placed in conflict; if the same value as is already held in One, it will be ignored. This requires the users to process this data specifically through the **Matched with Conflicts** area to resolve the issues and verify that they are happy to accept the incoming data prior to it being written to the One database. If the incoming data for that Data Item/Data Group is the same as the data in One, then it is ignored.

NOTE: By default the Data Processing Rules for all the data groups for a new B2B Student Base in v4 which was not set up as a XML Data Transfer Base in v3 will be set to **Always put in Conflict**.

The Data Processing is set against the **Data Groups**:

B2B: Student Setup

Select the **Data Group** e.g. Student Basic Details and click the radio button in the **Always put in Conflict** column.

Data Groups / Items	Always Import	Always put in Conflict	Import if Null else put in Conflict	Don't Import
Student Basic Details	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Boarder	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chosen Family Name	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chosen Given Name	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Connexions Assent	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
EAL	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
First Language	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Former UPN	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gifted and Talented	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Given Name 2	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Home Language	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medical Flag	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mode of Travel	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
NCY	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Part Time	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reg Group	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Religion	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

If a Data Group has Data Items under it which can have different Data Processing Rules set for it, when the Data Group is set to an alternative option the main Data Group will change to indicate that the Data Group settings are not all the same.

Data Groups / Items	Always Import	Always put in Conflict	Import if Null else put in Conflict	Don't Import
Student Basic Details	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Boarder	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chosen Family Name	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chosen Given Name	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Connexions Assent	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
EAL	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
First Language	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Import if Null else put in Conflict

Incoming data items will be imported as described in the *Always Import* section. If the One field contains different data, that item will be put into conflict; if the same value as is already held in One, it is ignored, see the **Always put in Conflict** section.

Don't Import

The incoming information for this data will always be ignored by the system.

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

NOTE: The Data Processing Rules for the Student Attendance and Student School History Data Groups will be set to Always Import; although this will be visible it will not be possible for Local Authorities to change the Data Processing Rules for these Data Groups.

Scenarios associated with Don't Import

For an **Unmatched Student** where all the Data Groups are set to **Do Not Import** the Unmatched Student will be placed in the **B2B People Match** (in One) screen.

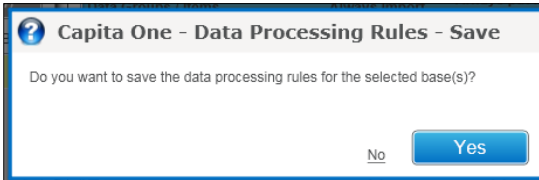
If the user selects to Add the Unmatched Student as a new student and the **Don't Import** Data Processing Rule is selected for any of the Data Groups/Data Items, these will be imported provided that all the incoming data is valid.

However, there is an option to also **Match** this student to an existing student in this case when an Unmatched Student comes through and this student is matched to an existing student then where the Data Processing rule is set to **Do not Import** that data will be ignored.

NOTE: With the current functionality of B2B:Student when this Unmatched Student is placed in the Matched with Conflicts area and the user selects to Add this student then all the incoming data sent for this student is also updated. When an Unmatched Student is 'Matched' to an existing student in the system then the data is processed as per the Data Processing rules and therefore if a Data Group is set to 'Always Import' then that data is imported and if a Data Group is set to 'Always put in Conflict' then this data is placed in the Matched with Conflicts.

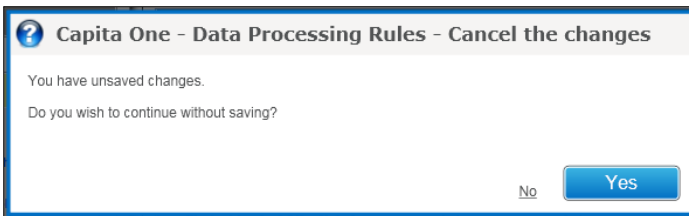
Once the required Data Processing Rules has been selected you must click the **Save** button.

The following message will be displayed:



Selecting **Yes** will save the changes made for the Data Groups/Data Items for the selected Base(s); clicking **No** will undo the changes that have been made.

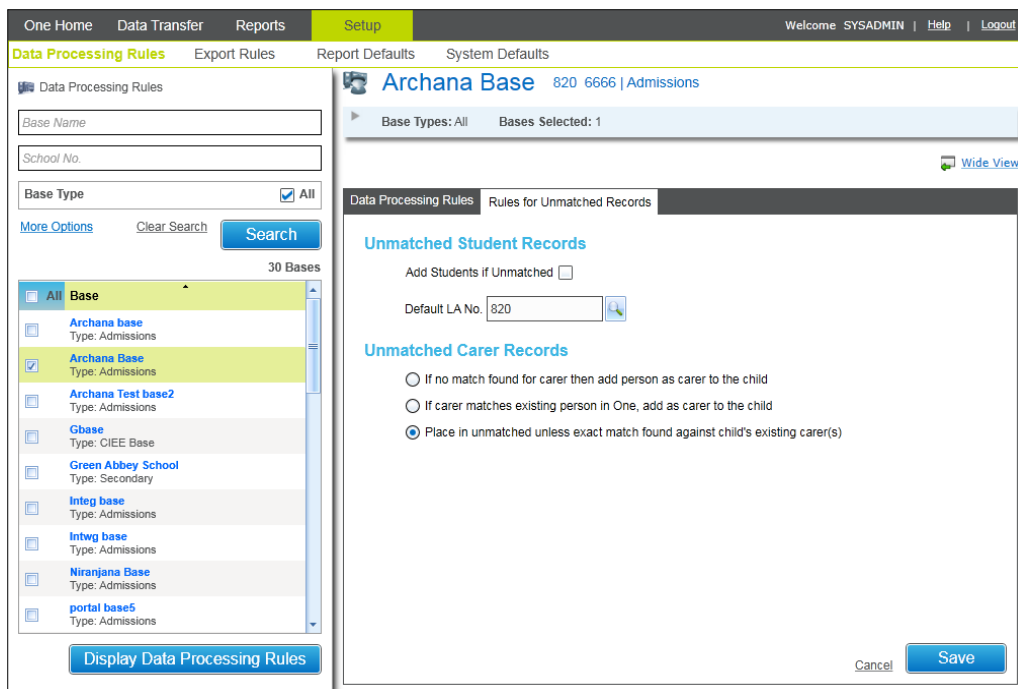
Selecting **Cancel** will display the following message:



Clicking **Yes** will undo the changes that have been made for the selected Data Groups/Data Items for the selected Base(s); clicking **No** will retain the changes made which you can select to save.

Rules for Unmatched Records

Setup | Data Processing Rules | Rules for Unmatched Records



B2B: Student Setup

This tab page allows you to set criteria to define how the system will deal with Unmatched Student Records and Unmatched Carer Records when these are received.

Unmatched Student Records

- Check the **Add Student if unmatched** box for unmatched student records to be added automatically during the import process.
- If a **Default LA No** is entered this will be recorded in the new student record but it is not mandatory to enter a number. If left blank the default system LA Number will be used. Selecting the browse button will display a pop up window with a list of all the LAs which could be defined as the Default LA for any Students that are automatically added.

LA Name	LA Number
B	9
B	8

Unmatched Carer Records

Action on Unmatched Carers is self-explanatory and the options to select from are:

- **If no match is found for carer then add person as carer to the child** – If no match for the incoming carer is found, then One creates a new person in One and adds them as a carer to the child.
- **If carer matches existing person in One, add as carer to the child** – B2B first attempts to match the incoming carer to any existing carers for the child recorded in One. If no matches are found, then B2B attempts to find a match against other existing people in One. If a unique match is found, One then assigns the existing person in One as the carer.
- **Place in unmatched unless exact match found against child's existing carer(s)** - This is the default option. Unless the incoming carer is an exact match for a person in One and the existing person is already designated as a carer in One, then the incoming carer is placed in conflict.

IMPORTANT NOTE: The carer matching process relies on the CARER_MIN LA default value to determine the minimum age a child must be in order to be matched as a carer. For more information, see [Setting the minimum age for a child to be considered a carer](#) on page 11.

Setting up Rules to Export Changed Data

Setup | Export Rules | Export Changes

This area enables you to specify which data you wish to send back to schools for a selected school or multiple schools when it has been changed in One. There are two ways this can be done:

- Where the data is changed in One by a user
- Where the data is changed via B2B:Student - this is where the data has been accepted from the **Manage Data Conflicts** screen or the data has been imported and the student is registered at other schools

NOTES: The default rule for all the data items for the **Export Changes** flags is deselected.

If you have already selected the **Export EMS Data Changes for this Field** for any of the data items in **v3 XML Data Exchange**, then these will not be copied over when you migrate your One system. Therefore, if you wish to send this data to your schools, select the appropriate data items.

It allows you to specify which Bases you wish to set the **Export Changes** for by entering search criteria for **Base Name**, **School No** and/or **Base Type**.

NOTE: Local Authorities can search for Bases by entering partial information for the **Base Name** and **School No**.

Clicking the **Clear Search** link will remove any selections or values you have entered.

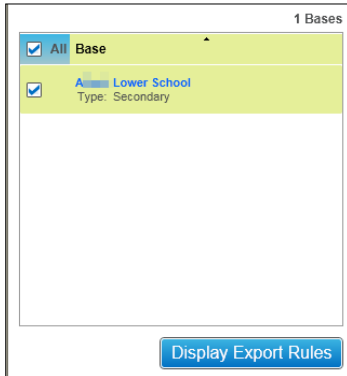
Clicking the **More Options** link allows you to refine your criteria by **Base Type**, **LA Bases**, **All Key Stages**, **URN** and **Clusters**. By default it will only include Active bases which are flagged as B2B: Student Bases (i.e. the **B2B Student Base** checkbox in v4 is 'ticked'), but **Show Inactive** or **Show All** options are available by selecting the appropriate radio button.

Click the **Close** link or button to close the **More Search Options** dialog.

Clicking the **Clear Search** link will remove any selections made in the **More Search Options** area.

B2B: Student Setup

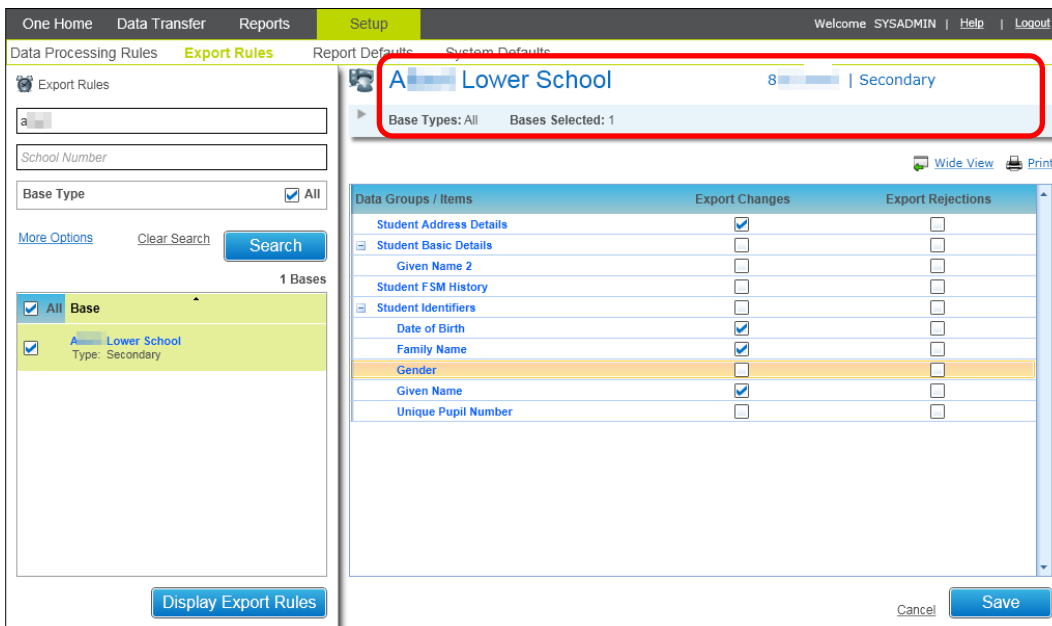
When the **Search** button is clicked the system will display the list of Bases that meet the criteria that have been defined, this will include a count of the number of Bases that have been retrieved.



NOTE: If you have not entered any search criteria when the **Search** button is selected, this will display all the Bases set as B2B Student Base in v4.

In order to view the export rules for a Base, you must select the required Base record and then click the **Display Export Rules** button. The full range of Data Group areas will be displayed in an extended tree-format (+ indicates where subsets exist and there are data items under it).

Details of the selected Base will be displayed in the Header of the screen.



Click the **Wide View** hyperlink to see the export rules in a wide view..

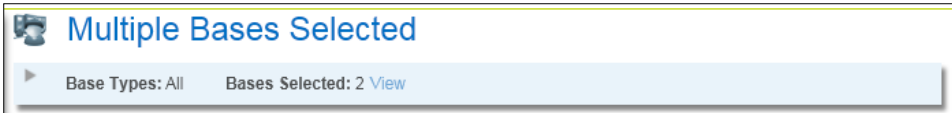
It will be possible to view the options for the **Export Changes** that have been set for the Data Groups and Data Items for the selected Base.

When more than one Base record is selected and the **Display Export Rules** button is clicked, then One displays the following message:

You can't view the Export Rules for multiple bases at the same time.

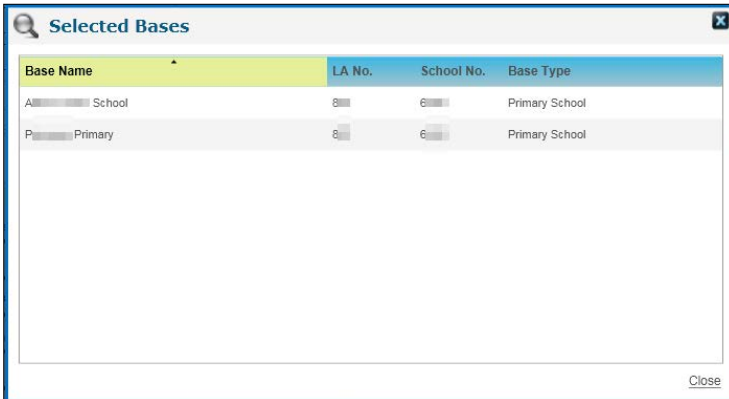
NOTE: You cannot view any existing **Export Rules** that have been defined for more than one Base at the same time; although you can define the **Export Changes** for more than one Base at the same time.

Where more than one school has been selected, the header of the school displays the details of the schools selected.

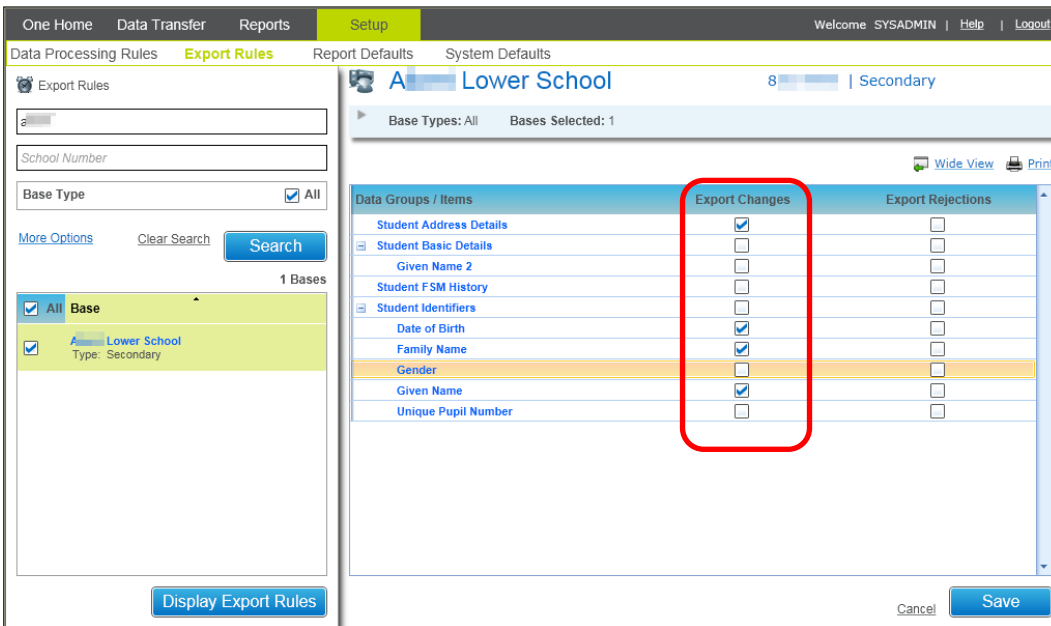


When the user selects the **View** link the system displays the **Selected Bases** pop up window to view the following details about the selected Bases: **Base Name**, **LA No.**, **School No.** and **Base Type**.

When the user selects the **View** link the system displays the **Selected Bases** pop up window to view the following details about the selected Bases: Base Name, LA No., School No. and Base Type.



In the **Export Changes** column, select the check boxes for the data items/data groups for which you want to send changes back to the school.



Click the **Save** button and when the data that has been selected in the **Export Changes** column is inserted or updated for a Student in One it will send this data to the relevant tables until the request from the school to import this data is received .

NOTE: Changed data refers to data has either been updated or this data has been added or inserted for the student in One; this does not include where the data has been deleted.

Setting up Rules to Export Rejected Data

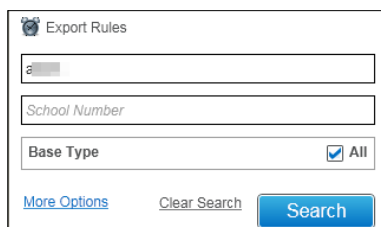
Setup | Export Rules | Export Rejections

This area allows you to specify which incoming data you wish to reject and where you wish to send the data held for that data item/data group back to schools for a selected school or multiple schools when it has been rejected in one or more of the tabs in the **Manage Data Conflicts** area.

NOTE: The default rule for all the data items for the **Export Rejections** flags is deselected.

It allows you to specify which Bases you wish to set the **Export Rejections** for by entering search criteria for **Base Name**, **School No** and/or **Base Type**.

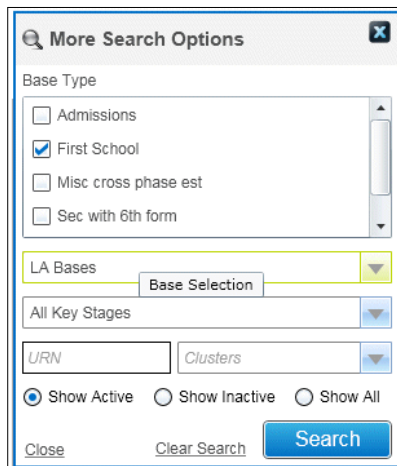
NOTE: Local Authorities can search for Bases by entering partial information for the **Base Name** and **School No**.



The screenshot shows a search form titled 'Export Rules'. It contains three input fields: a text field with a small 'a' character, a field labeled 'School Number', and a dropdown menu for 'Base Type' with 'All' selected. Below the fields are three buttons: 'More Options' (a link), 'Clear Search' (a link), and 'Search' (a blue button).

Clicking the **Clear Search** link will remove any selections or values you have entered.

Clicking the **More Options** link allows you to refine your criteria by **Base Type**, **LA Bases**, **All Key Stages**, **URN** and **Clusters**. By default it will only include Active bases which are flagged as B2B: Student Bases (i.e. the **B2B Student Base** checkbox in v4 is 'ticked'), but **Show Inactive** or **Show All** options are available by selecting the appropriate radio button.

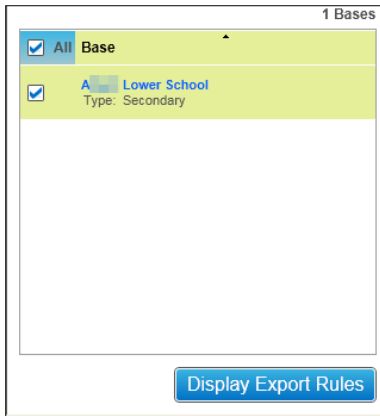


The screenshot shows a dialog box titled 'More Search Options'. It has a search icon and a close button (X) in the top right. The 'Base Type' section has a list of checkboxes: 'Admissions' (unchecked), 'First School' (checked), 'Misc cross phase est' (unchecked), and 'Sec with 6th form' (unchecked). Below this is a dropdown for 'LA Bases' with 'Base Selection' selected. There is also a dropdown for 'All Key Stages'. At the bottom, there are input fields for 'URN' and 'Clusters', and three radio buttons: 'Show Active' (selected), 'Show Inactive', and 'Show All'. At the very bottom are 'Close', 'Clear Search', and 'Search' buttons.

Click the **Close** link or button to close the **More Search Options** dialog.

Clicking the **Clear Search** link will remove any selections made in the **More Search Options** area.

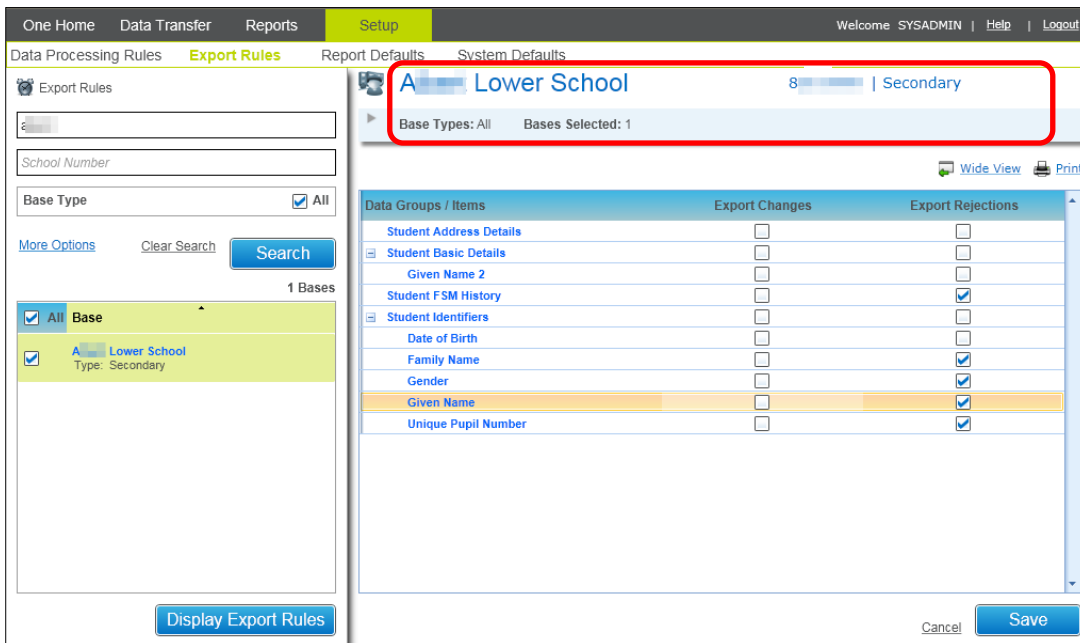
When the **Search** button is clicked the system will display the list of Bases that meet the criteria that have been defined, this will include a count of the number of Bases that have been retrieved.



NOTE: If you have not entered any search criteria when the Search button is selected this will display all the Bases set as B2B Student Base in v4.

In order to view the Export Rules for a Base you must select the required Base record and then click the **Display Export Rules** button. The full range of Data Group areas will be displayed in an extended tree-format (+ indicates where subsets exist and there are data items under it).

Details of the selected Base will be displayed in the Header of the screen.



Click the **Wide View** hyperlink to see the **Export Rules** in a wide view.

It will be possible to view the options for the **Export Rejections** that have been set for the Data Groups and Data Items for the selected Base.

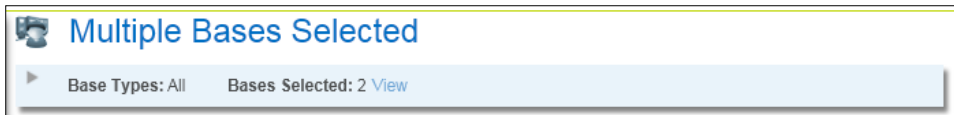
When more than one Base record is selected and the **Display Export Rules** button is clicked then the system will display the following message:

You can't view the Export Rules for multiple bases at the same time.

NOTE: You cannot view any existing **Export Rules** that have been defined for more than one Base at the same time; although you can define the **Export Rejections** for more than one Base at the same time.

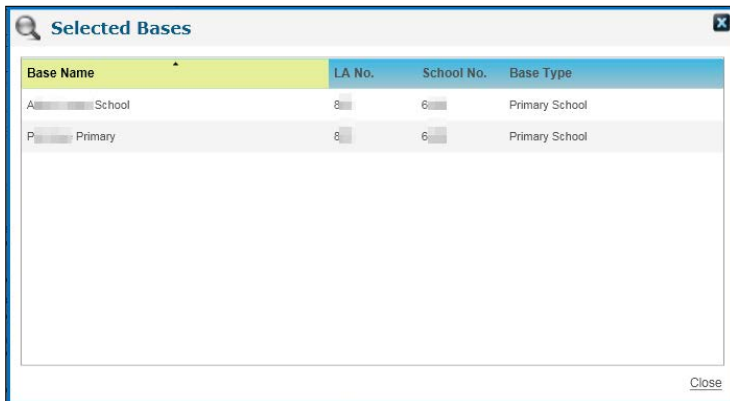
Where more than one School has been selected the Header of the School displays the details of the Schools selected.

B2B: Student Setup

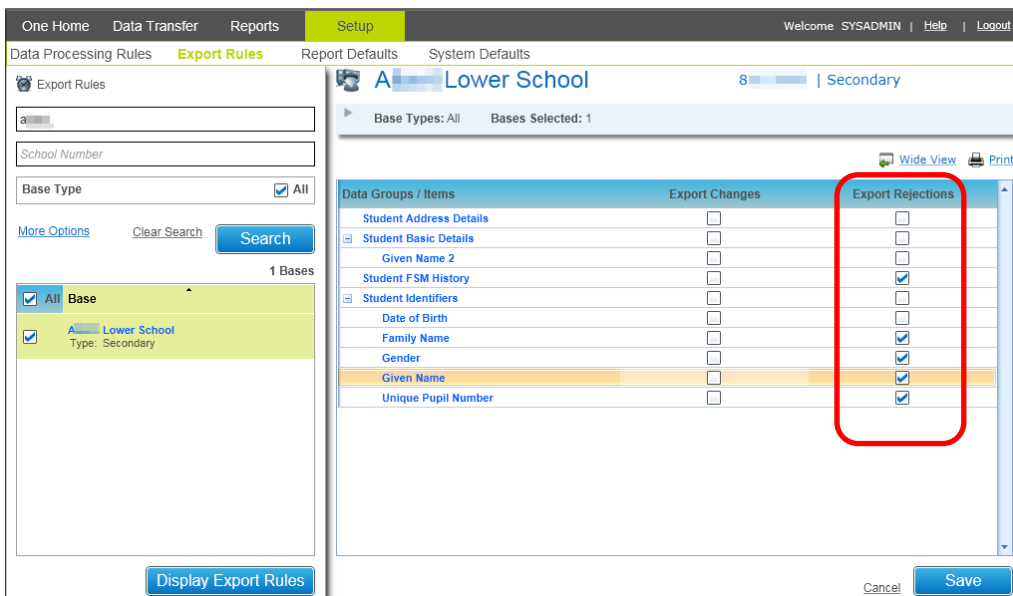


When the user selects the **View** link the system displays the Selected Bases pop up window to view the following details about the selected Bases: **Base Name**, **LA No.**, **School No.** and **Base Type**.

When the user selects the **View** link the system displays the Selected Bases pop up window to view the following details about the selected Bases: **Base Name**, **LA No.**, **School No.** and **Base Type**.



In the **Export Rejections** column, select the check boxes for the data items/data groups for which you want to send changes back to the school.



Click the **Save** button and when the data that has been selected in the **Export Rejections** column is inserted or updated for a Student in One it will send this data to the relevant tables until the request from the School to import this data is received .

NOTE: It will not be possible for Local Authorities to view any existing **Export Rules** that have been defined for more than one Base at the same time; although it will be possible to define the **Export Rejections** for more than one Base at the same time.

Report Defaults

The **Report Defaults** tab allows you to define what data is to be included in the Student Rejections Report and Exception Reports for Matched and Unmatched students

Set up | Report Defaults | Rejections Report

Use this tab to define that data to include in the **Rejections Report**, which will then capture details of any data that has been rejected from the **Matched with Conflicts** tab or any data that has automatically been rejected from the system, e.g. invalid data.

Select the check box for each type of data you want to include in the Rejections report

Once selected, you must click the **Save** button; clicking the **Cancel** hyperlink will undo any changes that you have made.

The screenshot shows the 'Setup - Report Defaults' page with the 'Rejections Report' tab selected. A list of data groups is displayed, all of which are checked. The 'Save' button is visible at the bottom right of the list.

Set up | Report Defaults | Exceptions Report

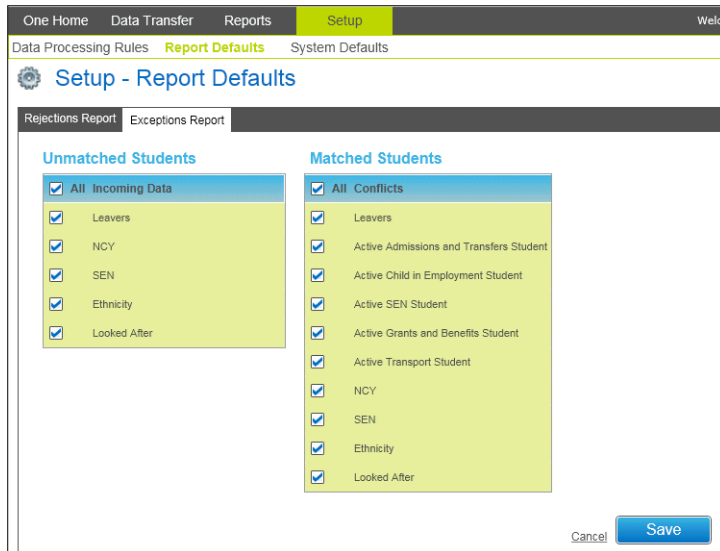
Use this tab to define that data to include in the Exceptions Report

Unmatched Students: Reporting on any information for Unmatched Students that are waiting to be processed (at the time of running the Exceptions Report) and setting the type of data to be included in the Exceptions Report.

Matched Students: Reporting on any information for Matched Students with Conflicts that are waiting to be processed (at the time of running the Exceptions Report) and setting the type of data to be included in the Exceptions Report.

Select the check box for each type of data you want to include in the Exceptions report.

Once selected, you must click the **Save** button; clicking the **Cancel** hyperlink will undo any changes that you have made..

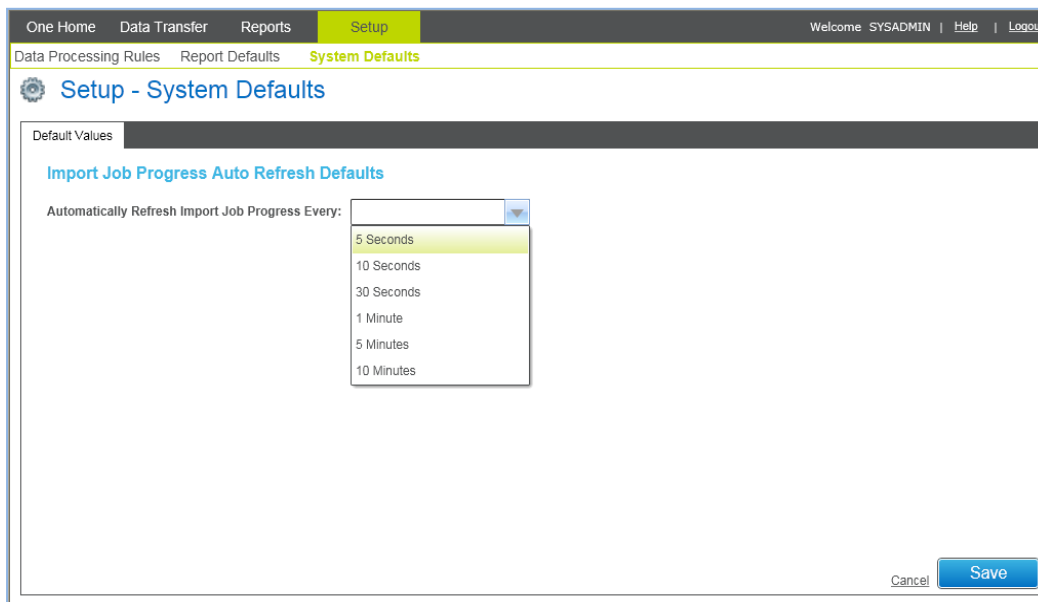


Setup System Defaults

Setting Import Job Progress Auto Refresh Defaults

Setup | System Defaults | Default Values

This section you to set the frequency for how often the Import Job Progress screen automatically refreshes. The following options are available: 5 seconds (defualut), 10 seconds, 30 seconds, 1 minute, 5 minutes to 10 minutes.



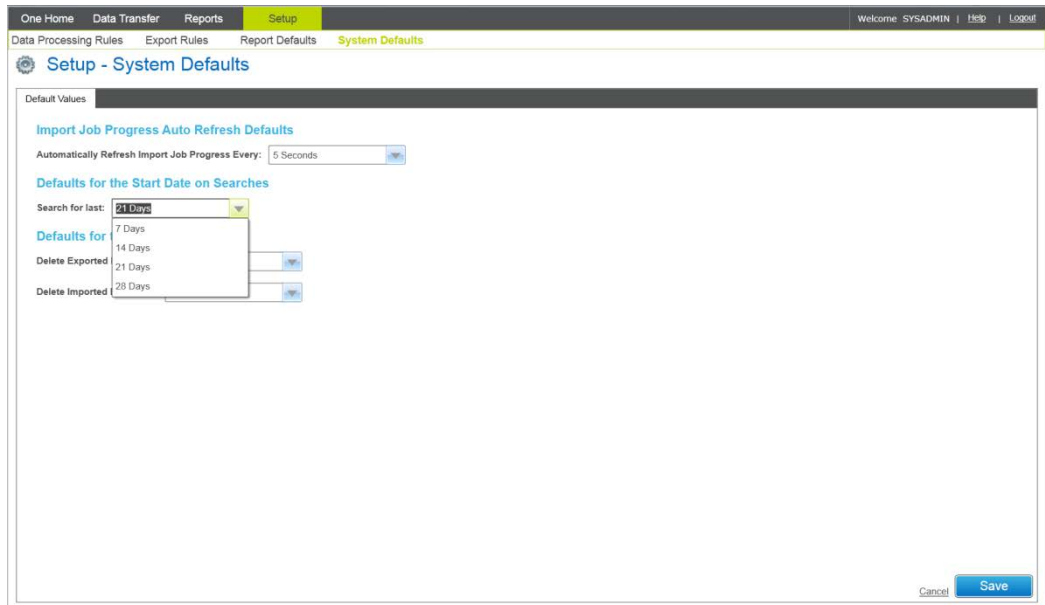
After making your selection from the drop-down list, click the **Save** button; the **Cancel** hyperlink can be selected to undo any changes made and revert to the existing value.

Setting Defaults for the Start Date on Searches

Setup | System Defaults | Default Values

This section enables you to define the **From Date** that you want to be populated by the system for the following screens:

- Data Transfer | Activity Log | Bases
- Data Transfer | Activity Log | Summary
- Data Transfer | Incoming Students
- Data Transfer | Error Log



The value selected here will be used for calculating the **From Date** which is populated by the system for the search screens. Select one of the following options from the **Search for the last** drop down:

- 7 Days (default)
- 14 Days
- 21 Days
- 28 Days

Select the **Save** button; the **Cancel** hyperlink can be selected to undo any changes made and revert to the existing value.

Defining Default Deletion Periods

Setup | System Defaults | Default Values

This page allows you to define the period after which any exported and imported files will be deleted.

NOTE: The files will be deleted only when an appropriate Scheduled Task is set up. For more information, see

[Setting up a Scheduled Task for Deleting Files](#) on page 33.

B2B: Student Setup

The screenshot shows the 'Setup - System Defaults' page. Under 'Default Values', there are three sections: 'Import Job Progress Auto Refresh Defaults' with a dropdown set to '5 Seconds'; 'Defaults for the Start Date on Searches' with a dropdown set to '21 Days'; and 'Defaults for the deletion of files'. The 'Delete Exported Files after:' dropdown is set to '6 Months'. The 'Delete Imported Files after:' dropdown is open, showing a list of options from '1 Month' to '9 Months'. At the bottom right, there are 'Cancel' and 'Save' buttons.

The value selected here will be used for calculating the period after which the imported and exported files will be deleted when the Scheduled Task for deleting files is run. Select one of the following options for the **Delete Exported Files after:** and the **Delete Imported Files after:** drop downs:

- 1 Month
- 2 Months
- 3 Months
- 4 Months
- 5 Months
- 6 Months (default)
- 7 Months
- 8 Months
- 9 Months
- 10 Months
- 11 Months
- 1 Year
- 2 Years
- 3 Years
- Never

Select the **Save** button; the **Cancel** hyperlink can be selected to undo any changes made and revert to the existing value.

Defining Defaults for Scheduled Tasks

Setup | System Defaults | Default Values

This section enables you to define a buffer period in which the **Last Run Status** of a scheduled task is displayed as **Pending** instead of as **Successful** or **Failed**. The buffer period is useful because sometimes there might be a short delay for a scheduled task to run. If the task is not run at the scheduled time, the **Last Run Status** is displayed as **Pending** until the file transfers successfully or when the value set here is reached, whichever occurs first. At this point, the status changes to either **Successful** or **Failed**.

The screenshot shows the 'Setup - System Defaults' page with the following settings:

- Import Job Progress Auto Refresh Defaults:** Automatically Refresh Import Job Progress Every: 5 Seconds
- Defaults for the Start Date on Searches:** Search for last: 7 Days
- Defaults for the Deletion of Files:**
 - Delete Exported Files after: 9 Months
 - Delete Imported Files after: 9 Months
- Defaults for the Scheduled Tasks:** Change 'Last Run Status' to failed if the Scheduled Task has not run after: 60 Minutes

Buttons for 'Cancel' and 'Save' are located at the bottom right of the form.

Defining Defaults for Attainment Import

Setup | System Defaults | Default Values

This section enables you to define the network share location to which B2B saves imported attainment files and the attainment related suspense files. The path must be valid and One must have write permissions to the directory. Click the **Test file access** button to ensure that the path works with B2B:Student. Once set, these values are used as the default folder when creating a B2B:Student scheduled task that is configured to transfer attainment data. Individual tasks can specify different sub-folders, but the folders must be under the root directory defined here.

The account under which the application server runs also requires read-write access to these shared locations. Typically, this would be the NetworkService user account. For more information, see [Windows permissions for the B2B attainment import and suspense folders](#) on page 28.

IMPORTANT NOTE: The directories designated in the **Imported attainment file location** and the **Suspense file location** fields will contain XML files containing potentially sensitive attainment information.

The Local Authority must ensure the following:

For security purposes, access to the import directories is tightly controlled.

For data protection purposes, after all suspense has been resolved, all remaining files are deleted from the directories.

One Home | Data Transfer | Reports | **Setup** | Welcome SYSADMIN | Help | Logout

Data Processing Rules | Export Rules | Report Defaults | **System Defaults**

Setup - System Defaults

Default Values

Import Job Progress Auto Refresh Defaults
 Automatically Refresh Import Job Progress Every: 5 Seconds

Defaults for the Start Date on Searches
 Search for last: 7 Days

Defaults for the Deletion of Files
 Delete Exported Files after: 9 Months
 Delete Imported Files after: 9 Months

Defaults for the Scheduled Tasks
 Change 'Last Run Status' to failed if the Scheduled Task has not run after: 5 Minutes

Defaults for attainment Import
 File location can be changed on individual attainment tasks
 Import attainment file location: \\10.128.39.142\B2B_files_359\ [Test file access]
 Suspend file location: \\10.128.39.142\B2B_files_359\ [Test file access]

Cancel [Save]

Matching only Active Students

Setup | System Defaults

When selected, the **Match only Active Students** option will prompt the user if they try to match an incoming student to an inactive student record in the One database. Users can choose to reject the update or continue the update to the inactive record in One. Neither option changes the inactive status of the record in the One database.

One Home | Data Transfer | Reports | **Setup** | Welcome SYSADMIN | Help | Logout

Data Processing Rules | Export Rules | Report Defaults | **System Defaults**

Setup - System Defaults

Default Values

Import Job Progress Auto Refresh Defaults
 Automatically Refresh Import Job Progress Every: 5 Seconds

Defaults for the Start Date on Searches
 Search for last: 7 Days

Defaults for the Deletion of Files
 Delete Exported Files after: 9 Months
 Delete Imported Files after: 9 Months

Defaults for the Scheduled Tasks
 Change 'Last Run Status' to failed if the Scheduled Task has not run after: 5 Minutes

Defaults for attainment Import
 File location can be changed on individual attainment tasks
 Import attainment file location: \\10.128.39.14\B2B_files_INT\ [Test file access]
 Suspend file location: \\10.128.39.14\B2B_files_INT\ [Test file access]

Match only Active Students

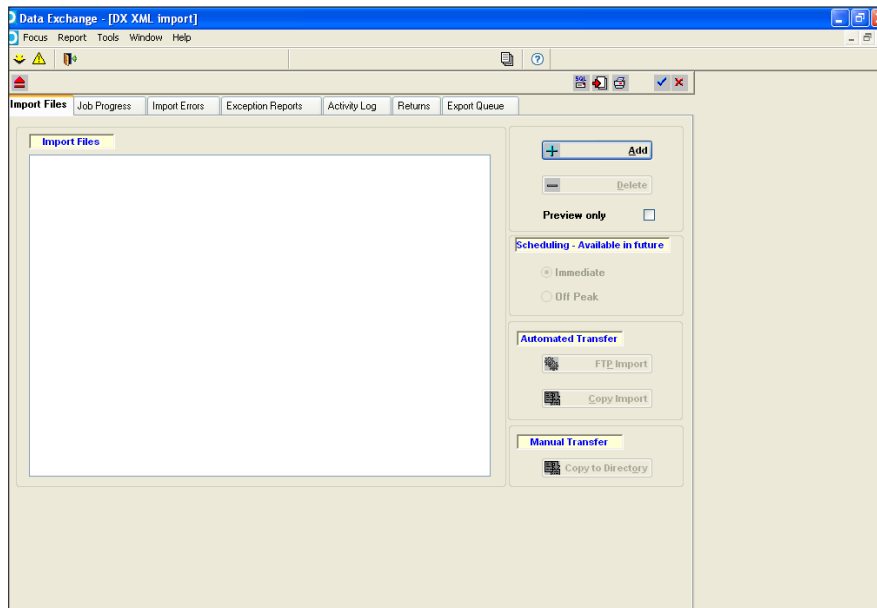
Cancel [Save]

Manually Importing Files

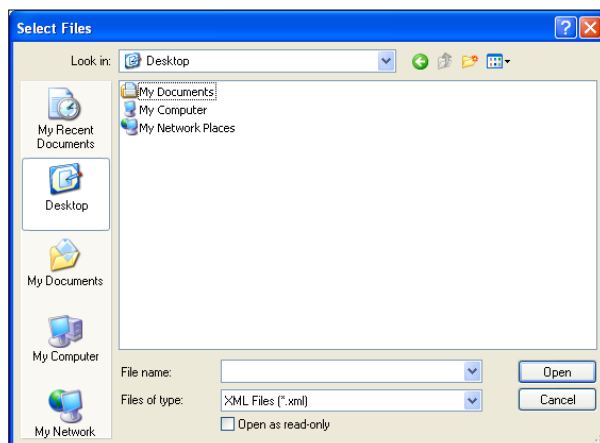
XML Data Exchange | Focus | Import/Export | Import Files

The following screen in XML Data Exchange in v3 allows to you to manually import B2B:Student files into v4 Online.

NOTE: Please ensure that **Directory** and **File** names used for XML data import do not have spaces. The FTP process will not recognise a file path which includes spaces, e.g. "Import Directory" you may use the underscore to separate words, e.g. "Import_Directory". A message will be displayed if a space is detected.



To locate the XML files for import, click the **Add** button. This will open a file selector to locate and choose the required XML import files. When selected, these will be displayed in the main **Import Files** box.



NOTE: Please ensure that **Directory** and **File** names used for XML data import do not have spaces. The FTP process will not recognise a file path which includes spaces, e.g. "Import Directory" you may use the underscore to separate words, e.g. "Import_Directory". A message will be displayed if a space is detected.

Clicking the **Delete** button will remove the highlighted import file from the Import Files box.

Preview Only

When importing XML data with the **Preview only** box checked, the import process ignores the Data Processing Rules e.g. Add student if Unmatched, and puts everything into the **Incoming Students** area for manual processing.

This allows you to match the incoming students with students on the One database; the system will not automatically update the One database.

Automated and Manual Transfer

There are several methods of importing data for upload, each method is dependent upon the type of server used and local network setups and is described in detail in the Import Methods overview. Clicking the appropriate button will start the import process. Once the import process has started the **Import job Progress** tab allows you to monitor the import progress.

This process makes the XML files available for Uploading which will disaggregate the student data.

Import Methods

The method of importing data into the database involves a four stage process:

1. Transferring the files to the server. Because this process may be carried out by several users at the same time, the file is prefixed with a process ID during the transfer process for unique identification. (For example the file Keystage.ks0 might become 253Keystage.ks0)
2. Starting an Oracle Job to wait for the files to be delivered to the server.
3. Once the files arrive at the server, start a server procedure to import the files.
4. Write any messages/errors to a database table.

Steps 2 and 4 are processed from within Oracle and need no input from the user but steps 1 and 3 require setup.

NOTE: *It may be that some of the information is irrelevant and will not be applicable to some modules using these import methods.*

There are three basic methods of transferring files to the server which are represented by three buttons on the Import tab:

FTP Import

Files are transferred using the FTP protocol. This may be used on either a UNIX or NT server; although FTP will need to be installed on an NT server.

Copy Import

Files are transferred using a simple direct Copy command. This may be used **only** on an NT Server and usually where an FTP Server program has not been installed.

If your FTP/Copy Setup (defined in System Administration) is UNIX this button will be disabled. This process will prefix the files with a process ID.

Copy to Directory

In other words you do your own transfer. This method may be used for both UNIX and NT servers. If, for some reason, you do not wish to use the two methods described above, you may copy the files to a directory and transfer the files to the server by some other method. For example you may email the files or use a USB drive. This process will prefix the files with a process ID.

Once the import files have been selected, click the **Copy to Directory** button. Another browse will be opened to select a destination.

Default Landing Page

V4 Online | Home Page

When **B2B:Student** is selected from the v4 Online Home Page then the first screen/tab that will be displayed to the user will be in the following order of priority:

Order of Display (subject to the logged on user having the correct permissions)	Screen/Tab displayed when the user first logs in	Navigation area in B2B:Student v4
1	Activity Log	Data Transfer Activity Log Summary
2	Incoming Students	Data Transfer Incoming Students Unmatched
3	Error Log	Data Transfer Error Log
4	All Reports	Reports All Reports
5	All Submitted	Reports All Submitted
6	Report Defaults	Setup Report Defaults
7	Import Job Progress	Data Transfer Import Job Progress
8	Data Processing Rules	Setup Data Processing Rules
9	System Defaults	Setup System Defaults

NOTE: The priority of the screen that will be displayed will depend on whether the logged on user has permissions to that specific area.

Alerts

Defining and Triggering Alerts

NOTE: In v3 there was an option in the System Behaviour of XML Data Exchange that enabled you to Suspend Conflicts for the following: Active A&T Students, Active CIE Students, Active G&B Students, Active SEN Students and Active Transport Students. This feature has been replaced by Alerts in v4 B2B:Student. Alerts are triggered whenever a change is made to any of the previously mentioned areas for an active student's record via a v4 B2B:Student import.

Prior to defining a v4 B2B:Student alert, a scheduled task must be created in order to trigger the alert. This is done using the user-managed scheduled task functionality in v4.

Tools | Administration | Schedule Task

This area enables you to create and maintain a scheduled task that can trigger any B2B:Student alerts that have been defined and activated. You can configure the scheduled task to run at a specific time and frequency. The scheduled task will send an email, workflow message or both to the required recipients whenever the data item described in the Alert Definition has been changed by B2B:Student.

B2B: Student Setup

For further details about how to set up and maintain scheduled tasks in v4, please refer to the *Technical Guide – v4 Scheduled Tasks* included with the release.

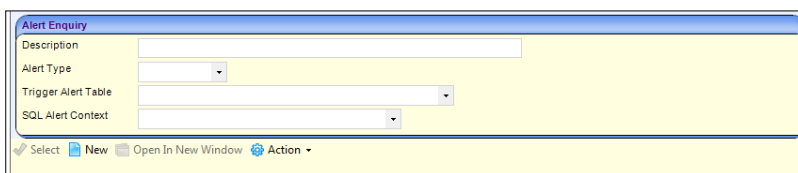
For the purposes of sending email and workflow messages related to B2B:Student alerts, you must add the **Alerts**, **Alert Outcomes** and **Delete Expired Alert Messages** options in the **Actions** panel for the scheduled task. It is possible to specify all these actions in the same scheduled task.

IMPORTANT NOTES: It is essential that any existing scheduled tasks are imported into v4 prior to using the scheduled task functionality.

Scheduled Task functionality is not required for displaying B2B:Student alert popup messages to the required recipients, these will continue to be displayed upon accessing the student in v4.

Tools | Administration | Alert Definition

Search for the B2B:Student by entering B2B in the **Description** field, click the **Search** button and select of the **Alert Enquiry** pop up which will retrieve the list of B2B:Student Alerts.

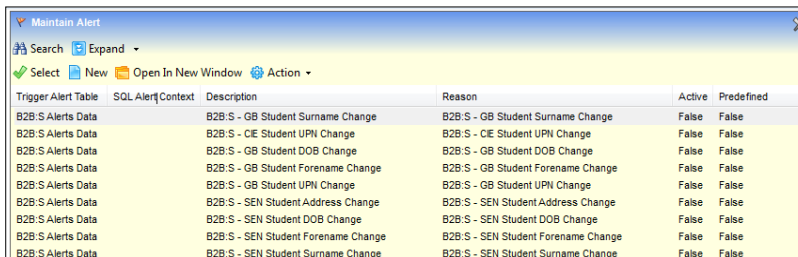


The Alert Enquiry form contains the following fields:

- Description: [Text Input]
- Alert Type: [Dropdown]
- Trigger Alert Table: [Dropdown]
- SQL Alert Context: [Dropdown]

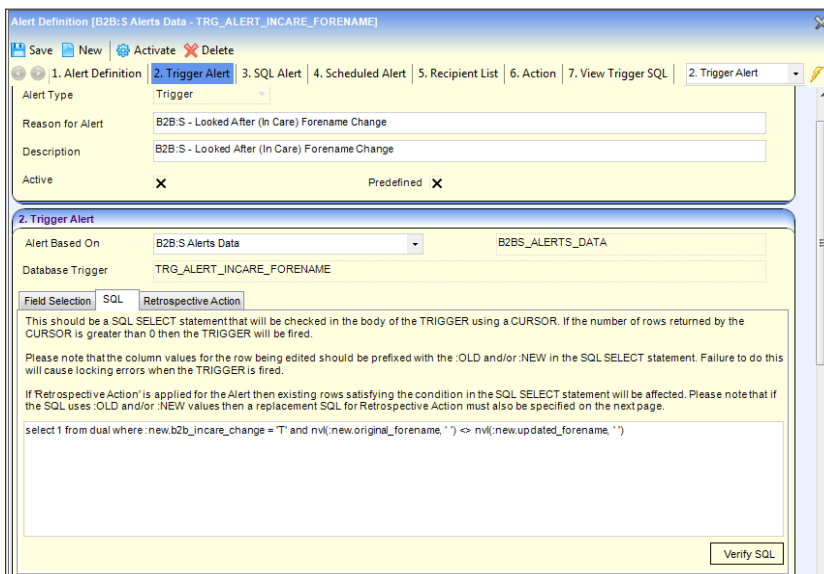
Buttons: Select, New, Open In New Window, Action

The alerts will be displayed by the system by default these alerts will be set as Inactive and the value in the **Active** column will be set to **False** to show this.



Trigger Alert Table	SQL Alert Context	Description	Reason	Active	Predefined
B2B:S Alerts Data		B2B:S - GB Student Surname Change	B2B:S - GB Student Surname Change	False	False
B2B:S Alerts Data		B2B:S - CE Student UPN Change	B2B:S - CE Student UPN Change	False	False
B2B:S Alerts Data		B2B:S - GB Student DOB Change	B2B:S - GB Student DOB Change	False	False
B2B:S Alerts Data		B2B:S - GB Student Forename Change	B2B:S - GB Student Forename Change	False	False
B2B:S Alerts Data		B2B:S - GB Student UPN Change	B2B:S - GB Student UPN Change	False	False
B2B:S Alerts Data		B2B:S - SEN Student Address Change	B2B:S - SEN Student Address Change	False	False
B2B:S Alerts Data		B2B:S - SEN Student DOB Change	B2B:S - SEN Student DOB Change	False	False
B2B:S Alerts Data		B2B:S - SEN Student Forename Change	B2B:S - SEN Student Forename Change	False	False
B2B:S Alerts Data		B2B:S - SEN Student Surname Change	B2B:S - SEN Student Surname Change	False	False

Highlight the relevant predefined alert and click the **Select** button to display the following screen:



The Alert Definition form shows the following details:

- Alert Type: Trigger
- Reason for Alert: B2B:S - Looked After (In Care) Forename Change
- Description: B2B:S - Looked After (In Care) Forename Change
- Active: (Predefined:)

2. Trigger Alert

- Alert Based On: B2B:S Alerts Data (B2BS_ALERTS_DATA)
- Database Trigger: TRG_ALERT_INCARE_FORENAME

Field Selection | SQL | Retrospective Action

This should be a SQL SELECT statement that will be checked in the body of the TRIGGER using a CURSOR. If the number of rows returned by the CURSOR is greater than 0 then the TRIGGER will be fired.

Please note that the column values for the row being edited should be prefixed with the :OLD and/or :NEW in the SQL SELECT statement. Failure to do this will cause locking errors when the TRIGGER is fired.

If Retrospective Action is applied for the Alert then existing rows satisfying the condition in the SQL SELECT statement will be affected. Please note that if the SQL uses :OLD and/or :NEW values then a replacement SQL for Retrospective Action must also be specified on the next page.

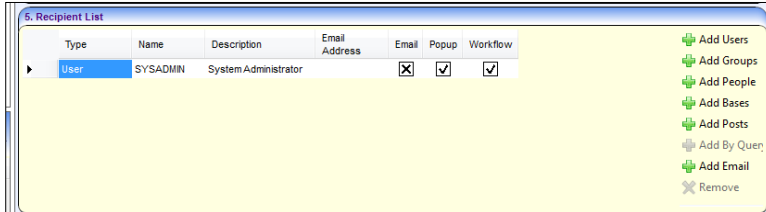
```
select 1 from dual where :new.b2b_incare_change = 'Y' and nv(:new.original_forename, '') <> nv(:new.updated_forename, '')
```

Verify SQL

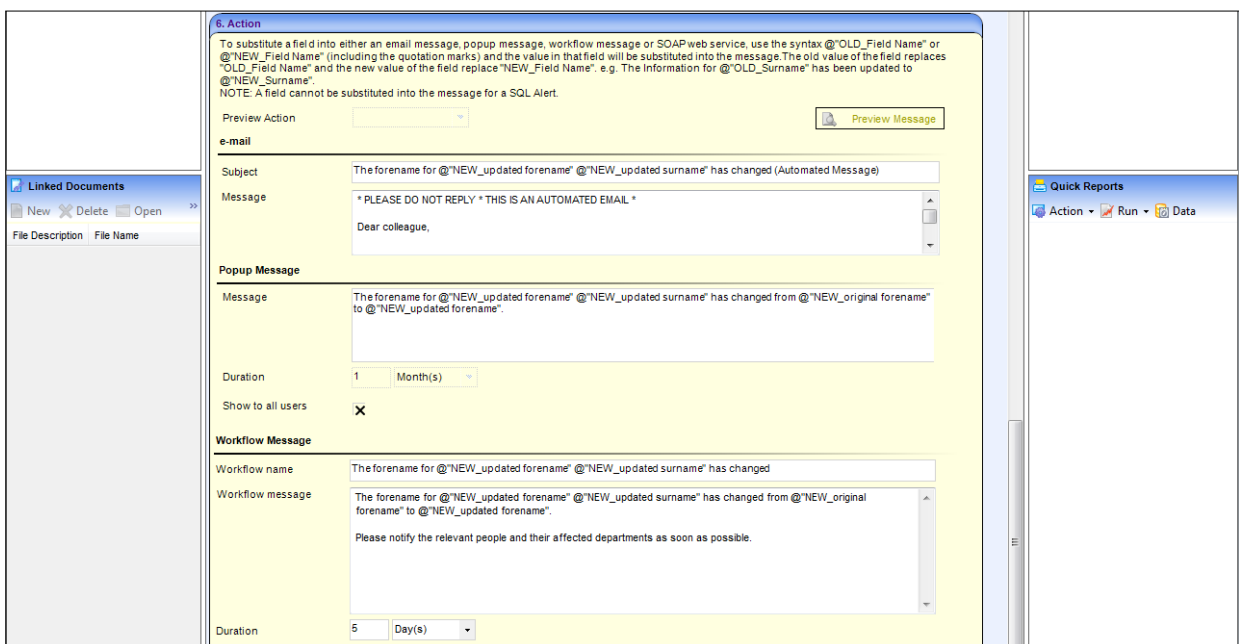
Select the **SQL** tab in the **Trigger Alert** panel to view the details of the Alert.

In the **Recipient List** panel, define the users that you wish to be notified of the alert by selecting the tick (✓) option for for the type of alert you wish to be triggered:

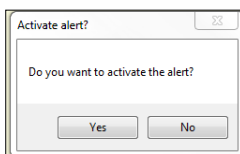
- **Email** – this will send an email to the users you have defined.
- **Popup Message** – this will display a pop up when you access the student’s record in v4 Client for those users you have defined
- **Workflow Message** – this will initiate a workflow message on the home page in v4 Client for those users that you have defined.



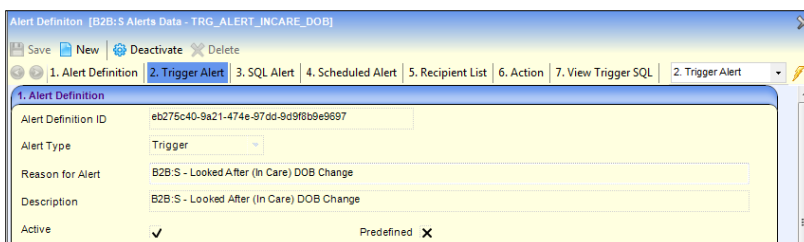
The **Action** area in the v4 Client displays the messages that will be displayed for the Email, Popup Message and Workflow Message which is displayed in the **Message** field of each area.



When you select to **Save** the details of this Alert the system will display the following message which will allow you to Activate the Alert; you must select **Yes** if you wish to activate the Alert.



When the selected Alert is activated the **Active** checkbox will be automatically ticked (✓) for the selected Alert.



The value in the Active column will be set to 'True'.

B2B: Student Setup

Trigger Alert Table	SQL Alert Context	Description	Reason	Active	Predefined
B2B:S Alerts Data		B2B:S - Looked After (In Care) Forename Change	B2B:S - Looked After (In Care) Forename Change	True	False
B2B:S Alerts Data		B2B:S - Looked After (In Care) Surname Change	B2B:S - Looked After (In Care) Surname Change	False	False
B2B:S Alerts Data		B2B:S - Looked After (In Care) UPN Change	B2B:S - Looked After (In Care) UPN Change	True	False

NOTE: Any Alerts that are not activated will not be triggered by the system.

The Alerts can be triggered by changes to two different kinds of data. Most alerts are triggered whenever an update is made to the student's data via B2B:Student when the data has been automatically updated in One or accepted through the **Matched with Conflicts** area in One. An additional alert can be triggered when a school officer changes a B2B:Student scheduled task relating to attainment data transfer.

Alerts triggered by changes to student data:

Alert Triggered for	Alert Type (which can be set individually for the following data when this is changed/updated by v4 B2B:Student)
Active Admissions and Transfers Student	UPN Forename Surname Date of Birth Address
Active Children In Employment and Entertainment Student	UPN Forename Surname Date of Birth Address
Active Grants and Benefits Student	UPN Forename Surname Date of Birth Address
Active v3 SEN Student	UPN Forename Surname Date of Birth Address
Active v4 SEN Student	UPN Forename Surname Date of Birth Address

Alert Triggered for	Alert Type (which can be set individually for the following data when this is changed/updated by v4 B2B:Student)
Active Transport Student	UPN Forename Surname Date of Birth Address
Active In Care Student	UPN Forename Surname Date of Birth Address
Active ICS Student	UPN Forename Surname Date of Birth Address
Active Employee (for the Student's Carers)	Forename Surname Address

The following alerts are triggered when a school changes a B2B:Student scheduled task ('B2B Attainment import task altered' trigger) :

Alert Triggered for	Alert Type (which can be set individually for the following data when this is changed/updated by a school officer)
Active B2B:Student scheduled tasks that transfer attainment data	Scheduled Task ID Task Owner Scheduled Task Name Task Type Aspect Hierarchy ID Import File Location Suspense File Location Process Flag Number of Months Import File Specification File Save Mode Base ID Base Name School Number Status

Deleted Student Alerts

The following alerts can be triggered when a B2B:Student scheduled task attempts to import data that contains information about students who have been deleted from the SIMS database. These alerts are useful because when a student is deleted in SIMS, this information is only sent to One once. If an import that contains deleted student details fails, then your database administrator can use the information in the alert to retrieve the information from the database CLOB for the failed import.

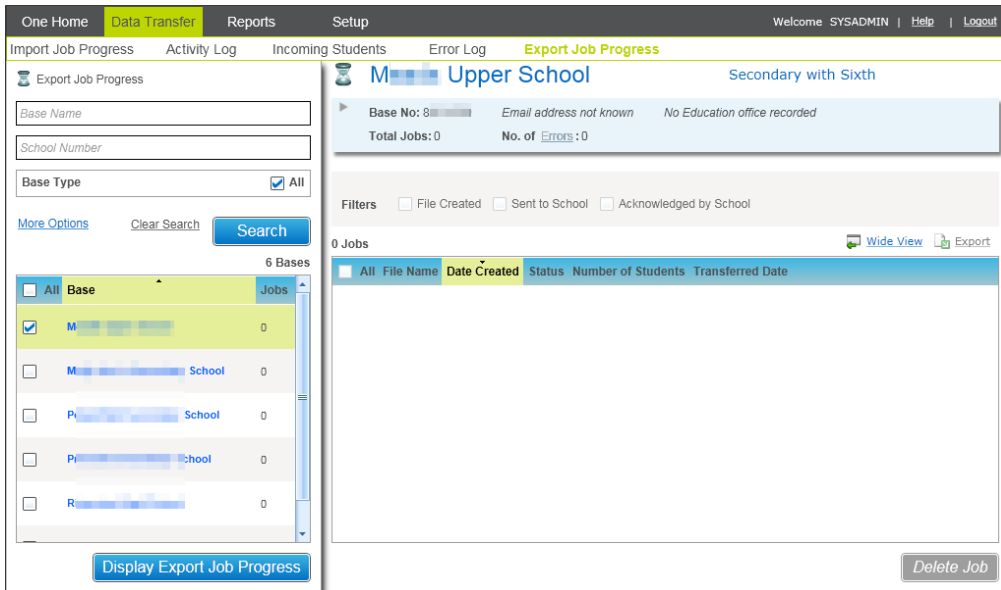
For these alerts to work, the bases from which you import B2B:Student data must have an LA contact configured and the assigned contact person must have a valid email address recorded in One. For more information, see the *Managing Base Details* chapter of the *Managing Bases* handbook, available from the One Publications website (www.onepublicatoions.com).

- **B2B Students deleted by schools – Job Failed** – When activated, an email is sent to the LA contact recorded for the school to inform them when an import containing details of students that have been deleted in SIMS has failed. Your One database administrator should retrieve the required data from the CLOB for the failed import or contact the One Service Desk.
- **B2B Students deleted by schools – Job Completed** - When activated, an email is sent to the LA administrator recorded for the school to inform them when an import containing details of students who have been deleted in SIMS has imported successfully. No further action is required and the details of the deleted students should be displayed in the **Deleted by School** tab. For more information see, [Deleted by School](#) on page 138.

Export Job Progress

Setup | Export Job Progress

The **Export Job Progress** page enables you to monitor the status of export jobs; these are any files that have been generated for schools, sent to schools or both.

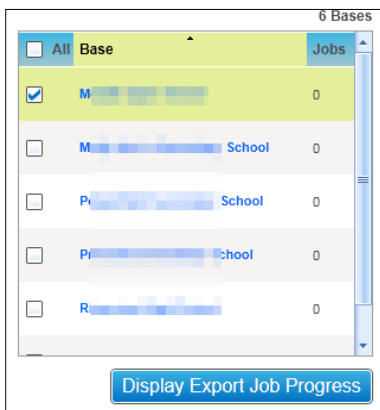


Select the **File Created**, **Sent to School** or **Acknowledged by School** check boxes to filter for those files with that **Status**.

The **Delete Job** button is disabled for all jobs in the **Export Job Progress** list, except for those with the **Status** of **ACK**. To delete a job that has failed, select the check box adjacent to the jobs that you wish to delete. Click the **Delete Job** button to remove the job from the **Export Job Progress** page.

Click the **Display Export Job Progress** button to view the status for any schools that have tried to import data.

If a school has not requested to import the data, the **Jobs** column will display a **0** count for the school.



Status

The **Export Job Progress** can have one of the following statuses:

- **CREATED** - The School has requested to import data.
- **SENT** - The data has been sent to the requesting School. When data is exported, any validations and business rules are applied in regards to how this data will be sent.
- **ACK** - Where data has been successfully received by the requesting school, any data that has been stored for the school where it is rejected or has changed will be retained by One until the next time the school requests to import this data.

NOTE: When data is changed or rejected in One this will be stored in the relevant tables until the school requests to import this data. The data will then be stored in these tables until the school has successfully imported this data which is denoted by **ACK** in the **Status** column.

Scheduled Tasks

From the One Autumn 2015 Release (3.58), local authorities can define scheduled tasks in v4 Online to get data from or send data to their schools. You can create scheduled tasks against a single base or multiple bases at once.

Before local authorities can begin maintaining B2B scheduled tasks for their schools, the existing scheduled tasks in SIMS must be migrated into One v4 Online.

More Information:

[B2B:Student Scheduled Tasks Prerequisites](#) on page on page 64
[Creating a B2B:Student scheduled task](#) on page 69

B2B:Student Scheduled Tasks Prerequisites

- SIMS at the Autumn 2015 Release (7.166) or later
- One at the Autumn 2015 Release (3.58) or later
- Schools have migrated B2B:Student Phase 2
- Schools have SIMS Services Manager installed and running
- One Provider Portal installed and configured. For more information, see the *Deploying and Configuring the One Provider Self Service Portal for Local Authorities* technical guide, available from the One Publications website (www.onepublications.com).

Migrating B2B Scheduled Task from SIMS to One

From the Autumn 2015 Release of SIMS and Capita One, an improved method for managing B2B:Student scheduled tasks has been implemented. In order to take advantage of the improvements, existing B2B:Student scheduled tasks must be migrated to the new system.

To perform the migration, SIMS and One must be on their respective Autumn 2015 release versions. Additionally, the schools must have SIMS Services Manager installed. After upgrading to the appropriate release, the migration process requires no input from the school; SIMS automatically notifies the One system that the tasks are ready for migration, and then then LA commences the migration at a convenient time.

Post-migration, the LA can view and manage all B2B:Student scheduled tasks in One v4 Online. Schools can click the new **Student Scheduled Task** button in SIMS to view the status of their scheduled tasks. If required, schools can continue to manage B2B:Scheduled tasks in three ways:

- take back full control of all scheduled tasks from the LA by enabling the **Lockdown Tasks To School Use Only** option in SIMS. This prevents the LA from editing existing or creating new scheduled tasks.
- create new scheduled tasks, which the school controls by default.
- request the LA to return control the school for specific B2B:Scheduled tasks.

The migration process occurs in the following order:

- Schools upgrade to the SIMS Autumn 2015 Release (7.166) and ensure SIMS Services Manager (SSM) is installed. the B2B Student Service is installed and activated automatically.
- LA upgrades to the One Autumn 2015 Release (3.58).

- SSM pings the One system to indicate that it is ready for migration. The ping is sent every day at the same time as the latest starting scheduled task starts. For example, if there are currently three B2B:Student scheduled tasks on the school’s SIMS system scheduled at 9:00, 9:15 and 19:55, the migration ping will be sent at 19:55 each day until the migration completes.
- Once the LA receives the migration ready ping from a SIMS school, the LA can commence the migration from within the One Bases v4 Online module.
- After the LA has initiated the migration, the next time the SSM sends the migration ping to One, SSM is informed that the migration should begin and the process of moving scheduled tasks from SIMS to One starts.

After the migration is complete, SSM sends a ping to One every four hours to check for changes to the scheduled tasks. If a task has been created and the details of the task have been synched with the school, then a green tick is displayed in the Queued column when viewing the list of scheduled tasks. If the task details have not been sent to the school, then a red cross is displayed. The following graphic indicates that the details of the recently created ‘blah’ task have been sent to the Rajeswari Base, but not anischool-1, anischool-11 or anischool-10.

Queued	Base Name	Scheduled Task Name	Data Flow	Status	Owner	Scheduler Settings	Cohort	Data Type	Next Run Date	Last Successful Run	Last Run Status
✗	anischool-10	blah	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04		P
✗	anischool-11	blah	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04		P
✗	anischool-1	blah	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04		P
✓	Rajeswari Base	blah	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04	24/11/2015 11:55:30	S
✓	Rajeswari Base	e1	Export	Active	LA	View	NCY	Changed Data		20/11/2015 11:08:07	S
✓	Rajeswari Base	e6	Export	Active	LA	View	NCY	Changed Data		20/11/2015 12:11:59	S

Verifying a School is Ready for Migration

After a school upgrades to the correct version of SIMS and SSM, SIMS sends a ping to One to indicate that the scheduled tasks are ready for migration. SIMS sends the ping each day at the same time that the final scheduled task is configured to run for that day. For example, if a school currently has three tasks per day and the final is scheduled to start at 19:55, then the ping is sent to One each day at 19:55 until the migration is complete.

A school’s migration status can be view in the Bases module of One.

To verify a school is ready to migrate its B2B:Student scheduled tasks:

1. In One v4 Online, select **Bases | All Bases** and search for the base with the scheduled tasks you want to migrate.
2. Highlight the required base in the search results to display the base details.

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The screenshot shows the 'Bases' management interface. On the left, a search results table lists several bases, with 'anischoo-7' selected. The main panel displays the details for this base, including its LA (820) and School Number (5157). The 'Migration Status' is 'Ready to migrate scheduled tasks'. The interface also shows tabs for 'Statutory Information' and 'Additional Information'.

3. In the base information at the top of the screen, review the **Migration Status**.

If the base is ready to migrate (SIMS is at the Autumn 2015 Release (7.166) or later and SSM is installed and configured), the **Migration Status** is “Ready to migrate scheduled tasks”. Otherwise, the status is “Not ready to migrate scheduled tasks”.

If the school is ready to migrate, proceed to [Running the B2B Scheduled Task Migration](#) on page 66.

Running the B2B Scheduled Task Migration

After SIMS at a school has automatically informed the One system at the LA that it is ready for migration, you can start the migration process in One v4 Online. The migration process can take up to 24 hours to complete.

1. In One v4 Online, select **Bases | All Bases** and search for the base with the scheduled tasks you want to migrate.
2. Highlight the required base in the search results to display the base details.

The screenshot shows the 'Bases' management interface with a search for 'sameer'. The search results table shows 'Sameers B2B base - 1313' as the only result. The main panel displays the details for this base, including its LA (820) and School Number (1313). The 'Migration Status' is 'Ready to migrate scheduled tasks'. The interface also shows tabs for 'Statutory Information' and 'Additional Information'.

- Click the **Migrate B2B Scheduled Tasks** button to display a confirmation dialog.
- Click the **Yes** button to start the migration process.

After the migration is finished, the migrated tasks are displayed on the **Scheduled Tasks** page. For more information, see [Viewing Scheduled Tasks](#) on page 74.

Viewing the migration report

The Scheduled Task Migration report is available to track which schools have had their scheduled tasks migrated from SIMS to One. Bases can be in one of the following categories:

Status	Description
Scheduled tasks migrated	The scheduled tasks have been migrated from SIMS to One.
Ready to migrate	The school/base has updated to the SIMS Autumn 2015 Release (7.166) and they have SIMS Service Manager (SSM) installed and configured.
Pending migration completion	The school has updated to a supported version of SIMS and SSM and the LA has started the migration process, but the migration is still in progress.
Not ready to migrate	The school/base has not upgraded to the SIMS Autumn 2015 Release (7.166) or they do not have SIMS Service Manager (SSM) installed and configured, or both.

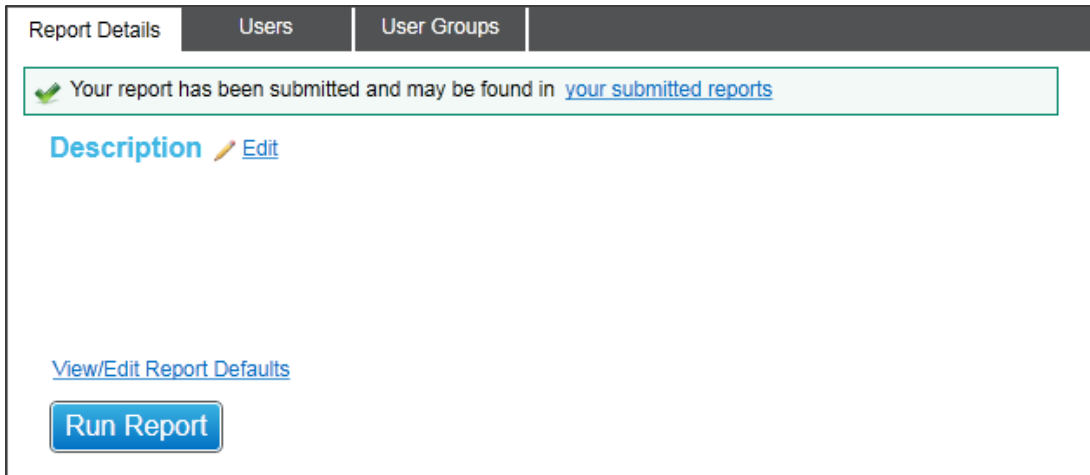
To run the report:

- In One v4 Online, select **Reports | All Reports** to display a list of available reports.

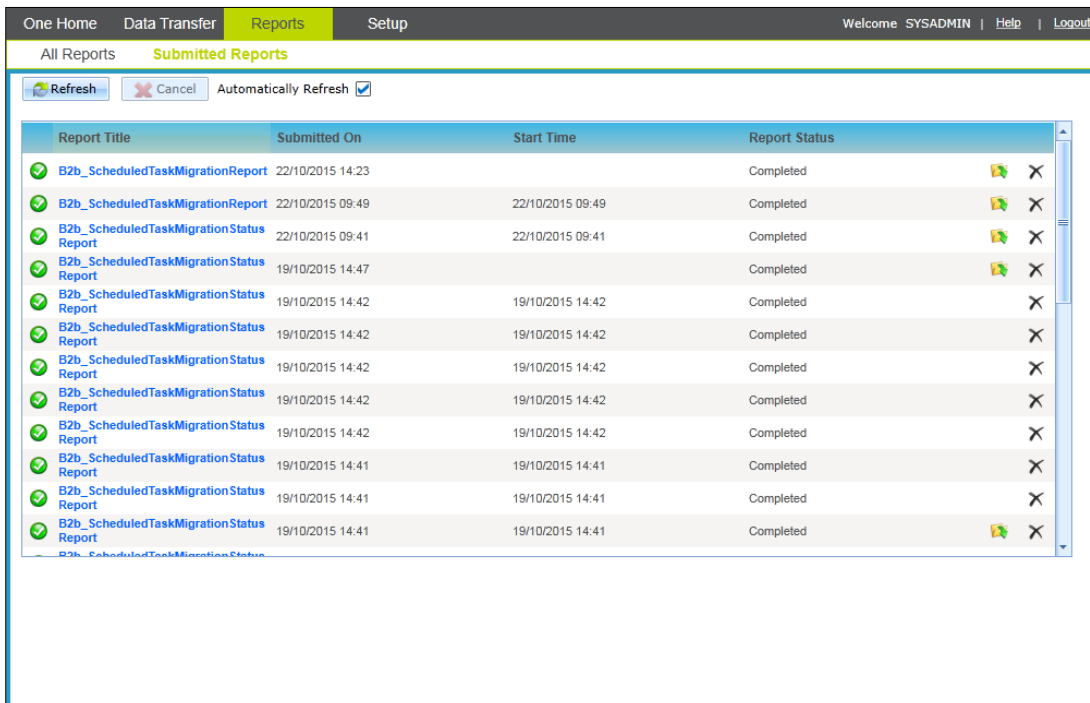
The screenshot shows the 'Reports' section of the One v4 Online interface. The 'All Reports' tab is selected, and a search for 'B2B Student Reports' has been performed. A table lists three reports: 'B2b_ExceptionsReport', 'B2b_RejectionsReport', and 'B2b_ScheduledTaskMigrationReport'. The 'B2b_ScheduledTaskMigrationReport' is highlighted. To the right, the details for this report are shown, including a 'Run Report' button and a 'Last Uploaded' timestamp of 21/10/2015 16:50.

- Select the **B2b_ScheduledTaskMigrationReport** in the list then click the **Run Report** button. When the report has finished compiling, a message is displayed with a link to the submitted reports area.

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3. Click the link in the message or the open **Submitted Reports** page to display a list of completed reports.



4. Locate the report in the list and click the **View Report** icon (a folder with a green arrow) to display the report in your web browser.

CAPITA one		Report Generated: 18/09/2015		
<h2>Scheduled task migration status report</h2>				
Scheduled tasks migrated		2 school(s)		
Base name	Base type	School no.	Migration completion date	
Archana Base	AT	6666	18/09/2015 11:17:58	
Sameers B2B base - 1313	SEC	1313		
Ready to migrate		1 school(s)		
Base name	Base type	School no.	Last migration check from sims	
Cooper Base	INF	5001	24/08/2015 15:22:38	
Pending migration completion		2 school(s)		
Base name	Base type	School no.	Initiated on	Last migration check from sims
jawaharb2b	AT	5550	25/08/2015 14:14:09	18/09/2015 00:00:00
SHAB Base	SEC	7777	25/08/2015 14:13:16	18/09/2015 11:18:10
Not ready to migrate		44 school(s)		
Base name	Base type	School no.		
B2B Migration Log Test Base		9999		
B2B Migration Log Test Base		9999		
B2B Migration Log Test Base		9999		

Creating a B2B:Student scheduled task

Data Transfer | Scheduled Tasks

A scheduled task can be set to run automatically on a particular day and time to transfer data to a school from the LA or from the school to the LA.

When a B2B:Student scheduled task is run, only data that has been changed since the posting of the last file is transferred. You can create scheduled tasks against a single site or multiple sites at one time.

When exporting data from the school, you can select the type of data that each scheduled task exchanges. The following data is available for exchange:

- Attainment Data
- Attendance Data (a scheduled task can exchange one of the following types of attendance data)
 - All attendances for Current Academic Year
 - All Unauthorised Absences for Current Academic Year
 - All Absences for Current Academic Year
 - All Attendances for Previous Academic Year
- Changed Data
- Snapshot Data

Depending on the type of data to be exchanged, you can select the group of students for whom you want to exchange data. The following groups are available:

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- NCY – students within the NCY (If exchange changed data, you cannot select specific NCYs).
- LAC – Student who are looked after.
- Leavers – Students that have left, if the leaving details have already been sent in a non-leavers task. If the student’s details have never been send in a non-leavers task, then they will not appear as in leaver in a leaver cohort. This option is not available if exchanging changed data.

NOTE: There is now an option in SIMS to bulk delete leaver data. Either the entire student record can be deleted or some data types associated with the record can be deleted such as Attendance, SEN, etc. Where the student record is retained, it could mean that some data will no longer be available for export.

To create a B2B:Student scheduled task

1. In One v4 Online, select **Data Transfer | Scheduled Tasks**.

The screenshot shows the 'Scheduled Tasks' page in One v4 Online. The interface includes a search sidebar on the left with input fields for 'Base Name', 'School Number', and 'Base Type' (set to 'All'). The main content area displays 'No Record Selected' and summary statistics: 'Base No: Email address not known, No Education office recorded', 'Total Scheduled Tasks: 0', 'Queued Tasks: 0', and 'Pending Tasks: 0'. Below this is a filter section with 'Task Name', 'Base Name', 'Cohort', 'Data Type', and 'Active' dropdowns. A table with columns 'Queued', 'Base Name', 'Scheduled Task Name', 'Data Flow', 'Status', 'Owner', 'Scheduler Settings', 'Cohort', and 'Data Type' is shown, but it is empty. At the bottom, there are buttons for 'Display Scheduled Tasks' and 'Add New Task'.

2. Enter the search criteria for the bases for which you want to create a scheduled task then click the **Search** button to display a list of bases that meet the criteria.

The screenshot shows the 'Scheduled Tasks' page in a web application. At the top, there are navigation tabs: 'One Home', 'Data Transfer', 'Reports', and 'Setup'. Below these are sub-tabs: 'Import Job Progress', 'Activity Log', 'Incoming Students', 'Error Log', 'Export Job Progress', and 'Scheduled Tasks'. The main content area is titled 'Scheduled Tasks' and shows a search for 'ani'. A summary box indicates 'No Record Selected' with 'Total Scheduled Tasks: 0', 'Queued Tasks: 0', and 'Pending Tasks: 0'. Below this is a table with columns: 'Queued', 'Base Name', 'Scheduled Task Name', 'Data Flow', 'Status', 'Owner', 'Scheduler Settings', 'Cohort', and 'Data Type'. The table is currently empty. On the left, a list of 15 bases is shown, including 'ani school-2' through 'anischool-13'. A 'Display Scheduled Tasks' button is at the bottom of the list.

3. In the list of bases, select the check box for each required base then click the **Display Scheduled Tasks** button.

The screenshot shows the 'Multiple Bases Selected' page. It displays a summary: 'Base Types: All', 'Bases Selected: 4 View', 'Total Scheduled Tasks: 13', 'Queued Tasks: 13', and 'Pending Tasks: 0'. Below this is a table with columns: 'Queued', 'Base Name', 'Scheduled Task Name', 'Data Flow', 'Status', 'Owner', 'Scheduler Settings', 'Cohort', 'Data Type', 'Next Run Date', 'Last Successful Run', and 'Last Run Status'. The table contains 17 rows of task data. The first three rows are marked with a red 'X' and a 'P' status, while the remaining 14 rows are marked with a green checkmark and an 'S' status. An 'Add New Task' button is located at the bottom right.

Queued	Base Name	Scheduled Task Name	Data Flow	Status	Owner	Scheduler Settings	Cohort	Data Type	Next Run Date	Last Successful Run	Last Run Status
X	anischool-10	biab	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04		P
X	anischool-11	biab	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04		P
X	anischool-1	biab	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04		P
✓	Rajeshwari_Base	biab	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04	24/11/2015 11:55:30	S
✓	Rajeshwari_Base	e1	Export	Active	LA	View	NCY	Changed Data		20/11/2015 11:08:07	S
✓	Rajeshwari_Base	e6	Export	Active	LA	View	NCY	Changed Data		20/11/2015 12:11:59	S
✓	Rajeshwari_Base	test6	Export	Active	LA	View	NCY	Changed Data		18/11/2015 12:00:18	S
✓	Rajeshwari_Base	test4	Export	Active	LA	View	NCY	Changed Data		18/11/2015 11:43:18	S
✓	Rajeshwari_Base	test3	Export	Active	LA	View	NCY	Changed Data		18/11/2015 11:40:19	S
✓	Rajeshwari_Base	e2	Export	Active	LA	View	NCY	Changed Data		20/11/2015 11:46:59	S
✓	Rajeshwari_Base	e3	Export	Active	LA	View	NCY	Changed Data		20/11/2015 11:59:00	S
✓	Rajeshwari_Base	e4	Export	Active	LA	View	NCY	Changed Data		20/11/2015 12:06:59	S
✓	Rajeshwari_Base	test2	Export	Active	LA	View	NCY	Changed Data		18/11/2015 11:20:19	S
✓	Rajeshwari_Base	test5	Export	Active	LA	View	NCY	Changed Data		18/11/2015 11:49:10	S
✓	Rajeshwari_Base	e7	Export	Active	LA	View	NCY	Changed Data		20/11/2015 12:30:59	S
✓	Rajeshwari_Base	test	Export	Active	LA	View	NCY	Changed Data		18/11/2015 10:54:30	S
✓	Rajeshwari_Base	import1	Import	Active	LA	View	NCY	Changed Data		18/11/2015 12:41:19	S

4. Click the **Add New Task** button to display the **Task Details** tab.

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Multiple Bases Selected [Back to Task List](#)

Base Types: All Bases Selected: 4 [View](#)

Total Scheduled Tasks: 33 Queued Tasks: 27 Pending Tasks: 6

Task Details Task Scheduler

Task Name

Active Owned by LA

Data Details

[Transfer Details](#)

Transfer Type: Export from School Import into School

[Data Filter Details](#)

Select Data Type

Select Student Cohort

5. Enter a **Task Name**.
6. Select the required **Transfer Type**.

NOTE: If you are editing an existing scheduled task, you cannot edit the **Transfer Type**.

7. If you selected **Export from School**, then you must select the type of data you want to transfer:
 - a. In the **Data Filter Details** section, select the type of data you want the task to exchange, i.e. Attendance Data, Changed Data or Snapshot Data. Depending on the selected data type different data filters are enabled. For more information on data options, see the introduction of this section.
 - b. Select the additional options required to export the required data. In this example, we are setting up a transfer of attendance data.

Multiple Bases Selected [Back to Task List](#)

Base Types: All Bases Selected: 4 [View](#)

Total Scheduled Tasks: 33 Queued Tasks: 27 Pending Tasks: 6

Task Details Task Scheduler

Doc Test

Active Owned by LA

Data Details

[Transfer Details](#)

Transfer Type: Export from School Import into School

[Data Filter Details](#)

Attendance Data

Attendance Data

All Attendances for Current Academic Year
 All Unauthorised Absences for Current Academic Year
 All Absences for Current Academic Year
 All Attendances for Previous Academic Year

NCY

- c. Select the required student cohort.
8. Select the **Task Scheduler** tab to display the scheduling options.

The screenshot shows the 'Task Scheduler' window with the following settings:

- Scheduler Settings:** Start date is 24/11/2015 at 11:20:29.
- Scheduled Task Pattern:** Radio buttons for 'Once', 'Weekly' (selected), and 'Monthly'. Below, a 'Days' section has checkboxes for 'All', 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Sunday'. 'Monday' through 'Friday' are checked.
- Advanced Settings:** 'Runs every' is set to 'Hours/Mins' for a duration of 'Hours/Mins'. 'Expire' is set to 'dd/mm/yyyy' at 'hh/mm/ss'.
- Term Time Settings:** Radio buttons for 'Run during school holidays only', 'Run During Term Time only', and 'Run all year' (selected).

Buttons for 'Cancel' and 'Save' are visible at the bottom right.

9. To configure the schedule for the task:
 - a. Select a **Start** date and time. The task will run at the date and time here.
 - b. In the **Scheduled Task Pattern** area, select the required pattern. You can choose one of the following options
 - **Once** – the task will run a single time, commencing at the date and time specified in the **Start** field.
 - **Weekly** – the task will run once a day at the time specified in the **Start** field on each selected day of the week.
 - **Monthly** – the task will run once a day at the time specified in the **Start** field on the selected day for each selected month.
 - c. Select the required option from the **Term time settings** area.
 - d. If required, edit the **Advanced settings**.

These fields enable you to run a task more than once on a specified day and also to set an expiry date. In the following graphic, the task will run on Monday, Tuesday, Wednesday, Thursday and Friday. It will run once every hour for 8 hours each day. The scheduled task will expire (will no longer run) on 27/10/2016 at 10:26:23.

10. After completing the schedule for the task, click the **Save** button to display a confirmation dialog.

NOTE: If you are editing a task that was created for multiple schools, when you save you are asked if you want to edit the task for just the currently selected school or for all the schools associated with the original scheduled task. Choose the appropriate option and click the **Yes** button.

The dialog box titled 'Scheduled Tasks' asks: 'Do you wish to save the Scheduled Task for the selected base(s)?' It has two radio buttons: 'anischool-10' (selected) and 'For all associated Bases'. There are 'No' and 'Yes' buttons at the bottom.

11. Click the **OK** button to close the dialog and display the list of tasks associated with the selected bases.

Viewing Scheduled Tasks

After creating a scheduled task or migrating existing scheduled tasks from a school, the tasks for each school can be viewed on the **Scheduled Tasks** page.

To view the task list for a school:

1. In v4 Online, select **Data Transfer | Scheduled Tasks**.

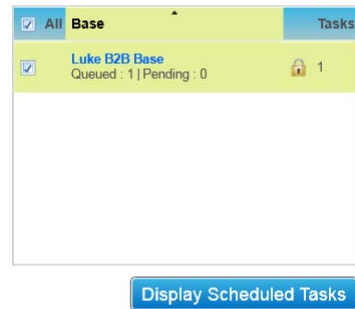
The screenshot shows the 'Scheduled Tasks' interface. On the left, there are search filters: 'Base Name', 'School Number', and 'Base Type' (set to 'All'). A 'Search' button is present. Below the filters, it says '0 Bases' and 'No results found. Please review your search options.' On the right, a summary box shows 'No Record Selected' and 'Task Count: 0'. Below this is a table with the following columns: Queued, Base Name, Scheduled Task Name, Data Flow, Status, Owner, Scheduler Settings, Cohort, and Data Type. The table is currently empty.

2. Enter the search criteria for the bases whose scheduled tasks you want to view.
3. Click the **Search** button to display a list of bases that meet the criteria.

The screenshot shows the 'Scheduled Tasks' interface after a search. The search criteria 'ani' is entered in the 'Base Name' field. The search results area now displays a list of 15 bases. The table has the following columns: Queued, Base Name, Scheduled Task Name, Data Flow, Status, Owner, Scheduler Settings, Cohort, and Data Type. The data in the table is as follows:

Queued	Base Name	Scheduled Task Name	Data Flow	Status	Owner	Scheduler Settings	Cohort	Data Type
15	ani school-2							
0	anischoo-7							
3	anischool-1							
0	anischool-10							
0	anischool-11							
0	anischool-12							
0	anischool-13							

NOTE: Schools can choose to lock down their scheduled tasks, which means they maintain all the scheduled tasks and the LA cannot create new or edit existing tasks. If a school has locked down their scheduled tasks, a padlock icon is displayed next to the school name in search results. If you select the school and try to add a new task or clone an existing task, a warning message is displayed and you are prevented from making any changes.



- In the list of bases, select the check box for each base you want to view then click the **Display Scheduled Tasks** button. The tasks associated with the selected bases are displayed.

NOTE: When viewing the details of a scheduled task that has been assigned to run in term time or holiday time only, One displays that the task has run, even if the task should not have run (because it is not term time or holiday time). This occurs because One is not aware of the school's term and holiday dates. If a scheduled task attempts to run when it should not, SSM at the school will not send the requested data.

Multiple Bases Selected

Base Types: All Bases Selected: 4 View

Total Scheduled Tasks: 13 Queued Tasks: 13 Pending Tasks: 0

Filters: Task Name Base Name Cohort Data Type Active

Task Count: 17

Queued	Base Name	Scheduled Task Name	Data Flow	Status	Owner	Scheduler Settings	Cohort	Data Type	Next Run Date	Last Successful Run	Last Run Status
✖	anschool-10	tbl0	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04		P
✖	anschool-11	tbl0	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04		P
✖	anschool-1	tbl0	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04		P
✔	Raisewari Base	tbl0	Export	Active	LA	View	NCY	Changed Data	25/11/2015 11:55:04	24/11/2015 11:55:30	S
✔	Raisewari Base	e1	Export	Active	LA	View	NCY	Changed Data		20/11/2015 11:08:07	S
✔	Raisewari Base	e0	Export	Active	LA	View	NCY	Changed Data		20/11/2015 12:11:59	S
✔	Raisewari Base	tbl0	Export	Active	LA	View	NCY	Changed Data		18/11/2015 12:00:18	S
✔	Raisewari Base	tbl4	Export	Active	LA	View	NCY	Changed Data		18/11/2015 11:43:18	S
✔	Raisewari Base	tbl2	Export	Active	LA	View	NCY	Changed Data		18/11/2015 11:40:19	S
✔	Raisewari Base	e2	Export	Active	LA	View	NCY	Changed Data		20/11/2015 11:46:59	S
✔	Raisewari Base	e2	Export	Active	LA	View	NCY	Changed Data		20/11/2015 11:59:00	S
✔	Raisewari Base	e4	Export	Active	LA	View	NCY	Changed Data		20/11/2015 12:06:59	S
✔	Raisewari Base	tbl2	Export	Active	LA	View	NCY	Changed Data		18/11/2015 11:20:19	S
✔	Raisewari Base	tbl5	Export	Active	LA	View	NCY	Changed Data		18/11/2015 11:49:10	S
✔	Raisewari Base	e7	Export	Active	LA	View	NCY	Changed Data		20/11/2015 12:30:59	S
✔	Raisewari Base	tbl1	Export	Active	LA	View	NCY	Changed Data		18/11/2015 10:54:30	S
✔	Raisewari Base	import1	Import	Active	LA	View	NCY	Changed Data		18/11/2015 12:41:19	S

Add New Task

- To view the details of a specific task, click the link in the **Scheduled Task Name** column for the required task.

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The screenshot shows the 'Scheduled Tasks' interface. On the left, a search results table lists 53 bases. The main panel shows details for a task named 'Dummy 5 Copy'. The task is active, owned by 'School', and last run on 22/10/2015 at 15:12:53. The task details include 'Transfer Type: Import into School' and 'Direction: Data to School'.

Base	Queued	Pending	Tasks
Jaffar Base 01	40	0	40
Rajeswari Secondary base	12	0	12
Nicolette Radcliffes Montessori	4	0	4
anischoo-7	0	1	1
Rajeswari Primary base	0	1	1
anischool-1	0	0	0
anischool-10	0	0	0

Assigning a Scheduled Task Ownership

When a scheduled task is created in v4 Online, by default, the owner is the LA. This means that the LA can edit the task details, including the data that the task imports or exports and the task scheduling. However, the ownership of the task can be re-assigned to a base and the school can edit it via the schools portal for B2B.

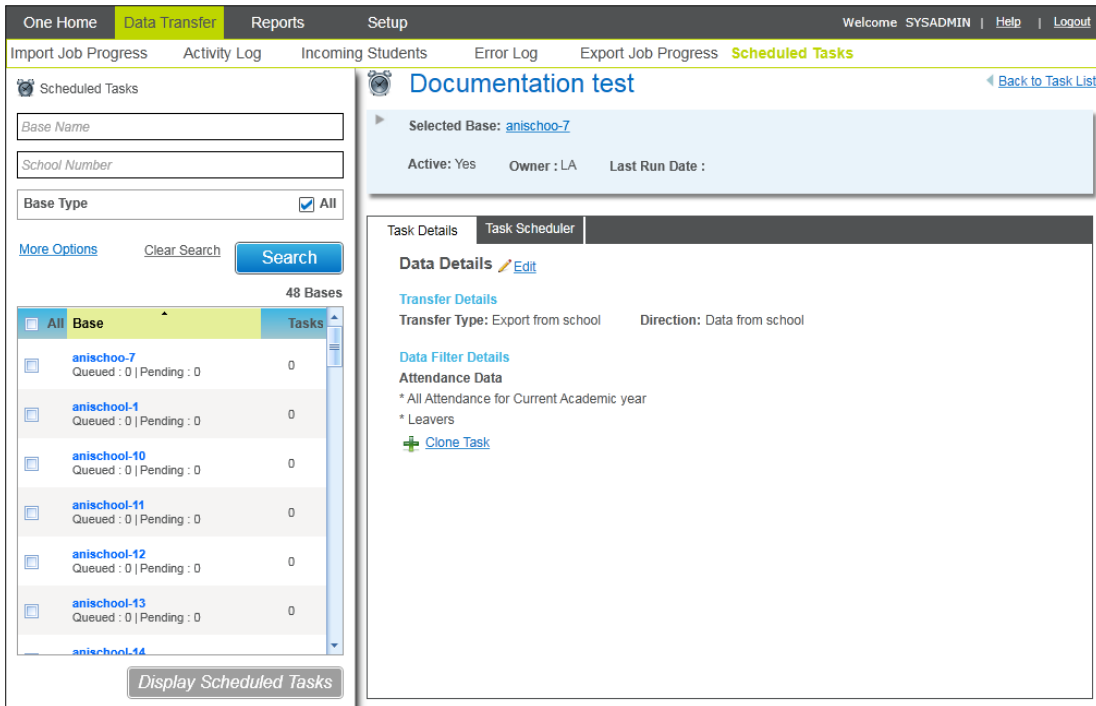
NOTE: Schools can choose to lock down their scheduled tasks, which means they maintain all the scheduled tasks and the LA cannot create new or edit existing tasks. If a school has locked down their scheduled tasks, a padlock icon is displayed next to the school name in search results. If you select the school and try to add a new task or clone an existing task, a warning message is displayed and you are prevented from making any changes.

The screenshot shows a search result for 'Luke B2B Base'. The base is listed with 'Queued: 1 | Pending: 0' and a padlock icon next to the task count '1', indicating that the task ownership is locked to the base.

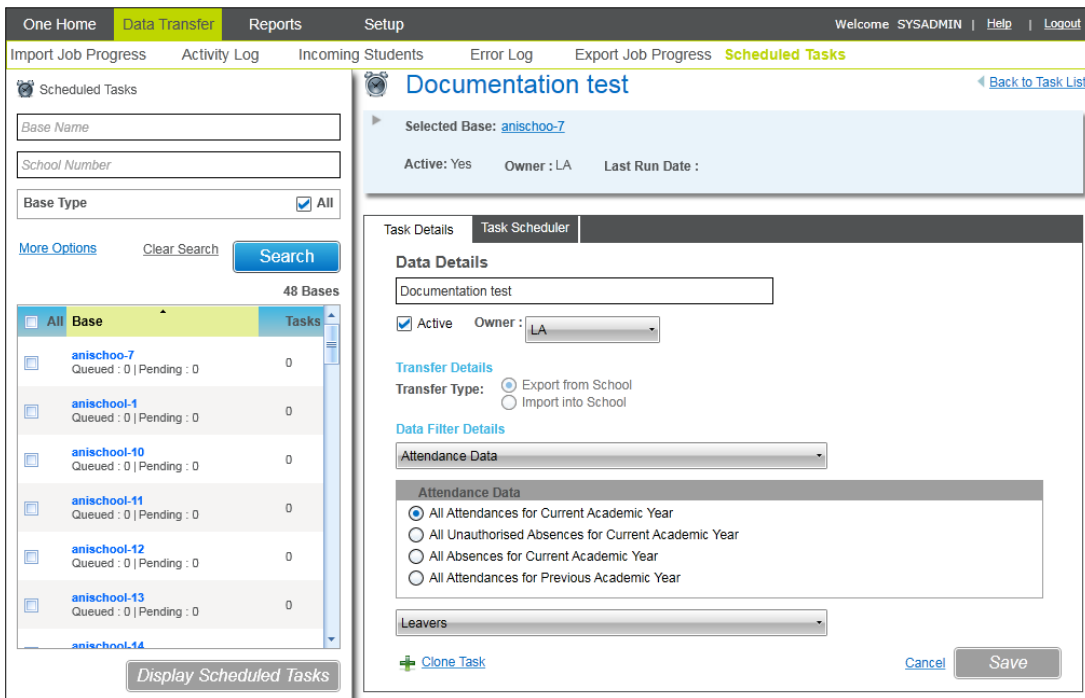
Base	Queued	Pending	Tasks
Luke B2B Base	1	0	1

To assign task ownership to a base:

1. Open the required scheduled task. For more information, see [Viewing Scheduled Tasks](#) on page 74.



2. In the **Task Details** tab, click the **Edit** hyperlink.



3. From the **Owner** drop-down, select **School**.

4. Click the **Save** button.

Once the ownership has been granted to the school, the LA can continue to view the details and the status of the task but it cannot edit the task.

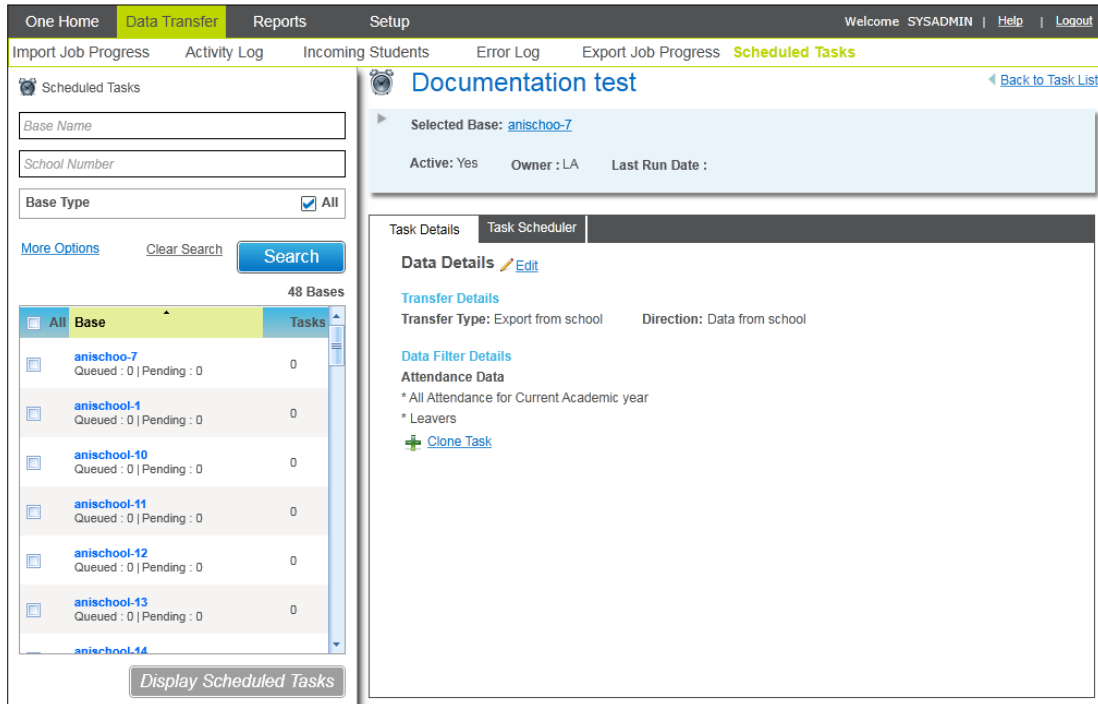
Deactivating a Scheduled Task

Once a scheduled task is created, it cannot be deleted. This is to ensure that an accurate activity log can be maintained. However, if a B2B:Student scheduled task is no longer required, you can make it inactive.

B2B: Student Setup

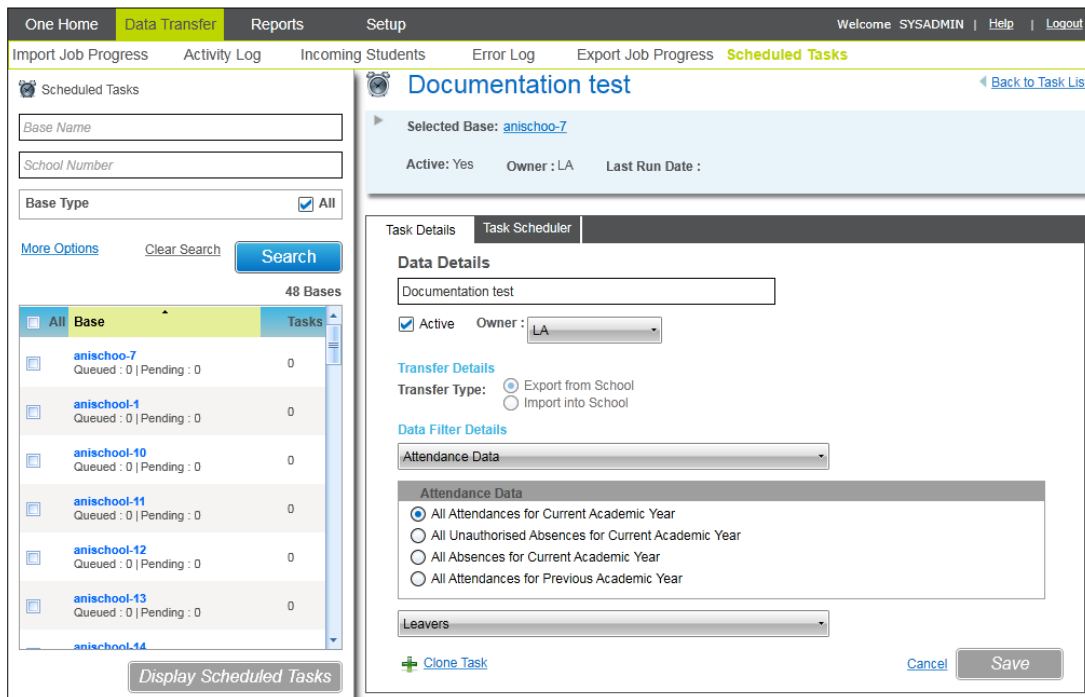
To make a scheduled task inactive:

1. Open the required scheduled task. For more information, see [Viewing Scheduled Tasks](#) on page 74.



The screenshot shows the 'Scheduled Tasks' interface. On the left, there is a search area with fields for 'Base Name', 'School Number', and 'Base Type' (set to 'All'). Below this is a table listing 48 bases, with the first few visible: anischool-7, anischool-1, anischool-10, anischool-11, anischool-12, anischool-13, and anischool-14. The 'Documentation test' task is selected, and its details are shown on the right. The task is active, owned by 'LA', and has a 'Last Run Date'. The 'Task Details' tab is active, showing 'Data Details' with options to edit, transfer, filter, and clone the task. The 'Transfer Details' section shows 'Export from school' and 'Data from school' direction. The 'Data Filter Details' section shows 'Attendance Data' with a dropdown menu and radio button options for 'All Attendances for Current Academic Year', 'All Unauthorised Absences for Current Academic Year', 'All Absences for Current Academic Year', and 'All Attendances for Previous Academic Year'. There is also a 'Leavers' dropdown menu.

2. In the **Task Details** tab, click the **Edit** hyperlink.



This screenshot shows the 'Task Details' page for the 'Documentation test' task. The 'Active' checkbox is checked, and the 'Owner' is set to 'LA'. The 'Transfer Type' is set to 'Export from School'. The 'Data Filter Details' section shows 'Attendance Data' with a dropdown menu and radio button options for 'All Attendances for Current Academic Year', 'All Unauthorised Absences for Current Academic Year', 'All Absences for Current Academic Year', and 'All Attendances for Previous Academic Year'. There is also a 'Leavers' dropdown menu. The 'Save' button is highlighted in blue, indicating it is the next step in the process.

3. Deselect the **Active** check box.
4. Click the **Save** button.

04 / Transferring Attainment Data

Introduction

B2B:Student enables you to transfer attainment information between SIMS in schools and One in the local authority. Data is transferred using the B2B:Student scheduled task functionality. The scheduled tasks specify which information is transferred from the school to the local authority and govern how and when the transfer will occur. Once transferred, attainment data can be imported into One for analysis, either automatically or manually, via the Pulse generic import functionality.

Prerequisites

- SIMS at the Spring 2016 Release (7.168) or later
- One at the Spring 2016 Release (3.59) or later
- Schools have migrated B2B:Student Phase 2
- Schools have SIMS Services Manager installed and running
- Pulse and B2B:Student v4 licence installed

Configuring B2B:Student attainment

Before transferring attainment data via B2B:Student, a One Administrator must ensure that the following configuration steps are completed:

- Assign the required permissions for importing data to a user group. For more information on the required permissions, see [Set up permissions for importing B2B attainment data](#) on page 23.
- Using the CCSConfig utility, enter the URL of the application server and the details of a One user with the appropriate data import permissions into the **Application Server Settings** panel of the **Integration Service**. For more information, see [Configuring the integration service to work with B2B attainment import](#) on page 12.
- Set the default import and suspense directories. For more information, see [Defining Defaults for Attainment Import](#) on page 53.
- Ensure that the required users (including the network account) have read-write access to the import and suspense directories. For more information, see [Windows permissions for the B2B attainment import and suspense folders](#) on page 28.
- If required, configure an alert to fire when a school officer updates or changes a B2B scheduled tasks owned by the school (use the 'B2B Attainment import task altered' trigger) . For more information, see [Alerts](#) on page 57.

Creating aspect hierarchies for B2B:Student attainment

In order to transfer attainment data from SIMS to One via B2B:Student, aspect hierarchies must first be created in the One v4 Client via **Focus | Aspect Management | Aspect Hierarchy**. Any hierarchies in the v4 Client are visible when creating the scheduled task that transfers the data. To help you to locate the hierarchies when creating the task, consider adding “B2B” or another appropriate prefix to hierarchy names that will be transferred via B2B:Student. For more information on creating aspect hierarchies, refer to the *Aspect Management* section in One v4 Client help, accessible in the v4 Client via **Help | Help**.

When creating aspect hierarchies and scheduled tasks, you should be aware that file size does have an impact on the speed at which results are processed. The following table can be used as a guide. The results are based on performance tests run on a system dedicated to these imports and which meets the OTRA specification for the One Spring 2016 release.

Actual performance in your One environment depends on the local, network connectivity, current load, and the specification of the mid-tier and Oracle Database servers.

Careful selection of the aspects in hierarchies can improve system performance. When an aspect is used across many year groups, you might consider multiple schedules spread across the NCYs and timing the imports for less busy periods. For example, creating separate scheduled tasks for collecting EYFSP, Phonics, KS1 and KS2 results from a large Primary school and automatically importing the data overnight, will process the results more quickly than the same data collected in a single file during working hours.

The following table summaries timings in our test environment:

Number of Students	Number of Aspects	Number of Results	Time for Import
50	40	2,000	1 min 25 sec
100	40	4,000	6 min 20 sec
250	40	10,000	14 min

Creating an attainment scheduled task

After creating the required aspect hierarchies, you must create the scheduled tasks to transfer the data from SIMS. Creating the scheduled task is similar to creating any other B2B scheduled task. Attainment data file sizes cannot exceed 2MB. Once configured, attainment scheduled tasks behave like any other B2B:Student scheduled task. Additionally, schools can create and control attainment scheduled tasks via the schools portal, just like other B2B:Student scheduled tasks.

The following attainment specific options are available in the **Task Details** tab. To configure these options, you must select **Attainment Data** in the **Data Filter Details** section.

Task Details
Task Scheduler

Task Name

Active
 Owned by LA

Data Details

Transfer Details

Transfer Type: Export from School
 Import into School

Data Filter Details

Attainment Data

B2B - Key Stage 1

Result from the last 6 Months

Allow file to be automatically processed via Pulse
 Leave file for a user to manually process via Pulse

Location for Import File \\10.128.39.142\B2B_files_359\

Location for Suspense File \\10.128.39.142\B2B_files_359\

Optional sub folder location

Optional sub folder location

Test file access
Test file access

Specification to Import attainment data into pulse

B2B Attainment Results Fast Track

Option	Description
Select Aspect Hierarchy	Choose the aspect hierarchy that this scheduled task will transfer. All aspect hierarchies in the v4 Client are available from the drop-down.
Results from the last <i>n</i> months	Choose the number of months of attainment results that you want to include each time the scheduled task is run. You can only select results from the last year (1-12 months).
Allow file to be automatically processed via Pulse	Select this option if you want Pulse to check the file import location for new data and automatically process the data. Import progress can be viewed on the Import Job Progress page. For more information on viewing progress, see Import Job Progress on page 86.
Leave file for a user to manually processed via Pulse	Select this to leave the transferred data unprocessed. You must then manually process the data using the Pulse generic import functionality. If this option is selected, B2B does not import any data into One automatically. Therefore, no information is displayed in the Import Job Progress page.
Location for Import File	This can be any directory under the root directory. To help with organisation, you can add additional directories. The root import location can only be changed by an administrator in the Defaults for attainment Import section via Setup System Defaults .
Location for Suspense File	This can be any directory under the root directory. To help with organisation, you can add additional directories. The root suspense location can only be changed by an administrator in the Defaults for attainment Import section via Setup System Defaults .

Option	Description
Test file access	Before a task can be saved, you must set a directory for import and suspense files and then click the corresponding Test file access buttons. If the test is successful, you can save the task.
Specification to Import attainment data into pulse	The only option is B2B Attainment Results Fast Track . If you want to use a different specification, then you must configure the task as a manual task and import the transferred data file manually using your required specification.

After configuring the scheduled task for attainment, the details are transmitted to the SIMS installations at the base, just like other scheduled tasks. Data is then imported from SIMS in accordance with the options configured in the task.

For more information on creating a B2B scheduled task, see [Creating a B2B:Student scheduled task](#) on page 69.

IMPORTANT NOTES: *If data is transferred to One but fails to import, the file remains in the import folder. This folder should be checked periodically for files that have failed to import and the files should be deleted.*

The Local Authority must ensure the following:

For security purposes, access to the import directories is tightly controlled.

For data protection purposes, after all suspense has been resolved, all remaining files are deleted from the directories.

An alert can be configured to fire when a school officer updates or changes one of their tasks (use the 'B2B Attainment import task altered' trigger). For more information, see [Alerts](#) on page 57.

Viewing attainment import reports

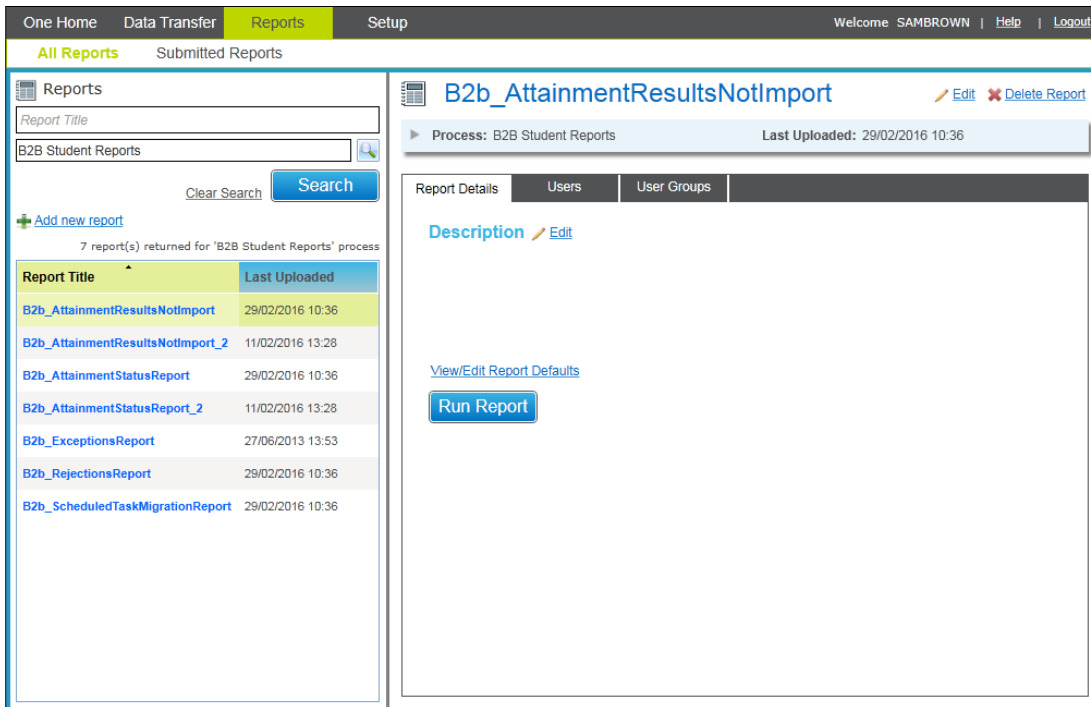
There are two reports available that summarise the status of attainment data imports. The following information is available in the reports:

- Attainment Results Not Imported (B2b_AttainmentResultsNotImport)
 - Base name
 - File name
 - Import date
 - Results not imported.
- Attainment Status Report (B2b_AttainmentStatusReport)
 - File name
 - Import date
 - Results imported
 - Results not imported.

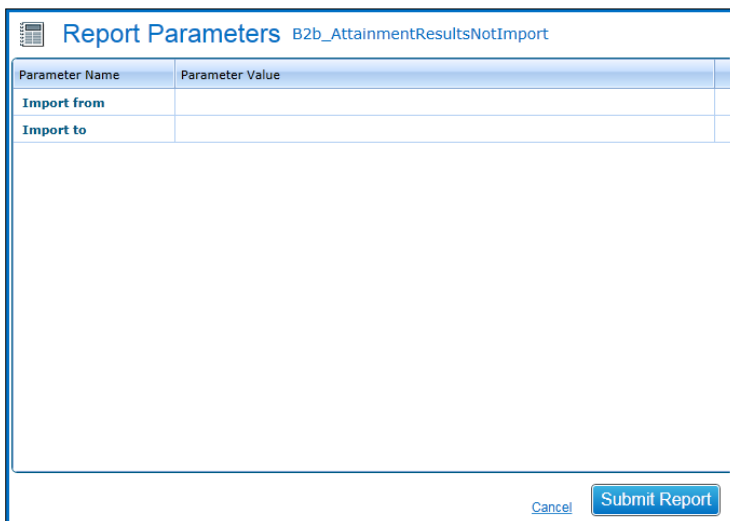
The following instructions use the B2b_AttainmentResultsNotImport report as an example, but the steps for producing the B2b_AttainmentStatusReport report are the same.

To view a report:

1. In One v4 Online, select **Reports | All Reports** to display a list of available reports.



2. Select the **B2b_AttainmentResultsNotImport** in the list, then click the **Run Report** button to display the **Report Parameters** dialog.



3. To specify the dates you want the report to cover, click in the **Import from** and **Import to** fields and select the required dates.

Transferring Attainment Data

Parameter Name	Parameter Value
Import from	01/02/2016
Import to	01/03/2016

Cancel Submit Report

4. Click the **Submit Report** button.

When the report has finished compiling, a message is displayed with a link to the submitted reports area.

Report Details Users User Groups

✓ Your report has been submitted and may be found in [your submitted reports](#)

Description [Edit](#)

[View/Edit Report Defaults](#)

Run Report

5. Click the link in the message or the open **Submitted Reports** page to display a list of completed reports.

Report Title	Submitted On	Start Time	Report Status
B2b_ScheduledTaskMigrationReport	22/10/2015 14:23		Completed
B2b_ScheduledTaskMigrationReport	22/10/2015 09:49	22/10/2015 09:49	Completed
B2b_ScheduledTaskMigrationStatus Report	22/10/2015 09:41	22/10/2015 09:41	Completed
B2b_ScheduledTaskMigrationStatus Report	19/10/2015 14:47		Completed
B2b_ScheduledTaskMigrationStatus Report	19/10/2015 14:42	19/10/2015 14:42	Completed
B2b_ScheduledTaskMigrationStatus Report	19/10/2015 14:42	19/10/2015 14:42	Completed
B2b_ScheduledTaskMigrationStatus Report	19/10/2015 14:42	19/10/2015 14:42	Completed
B2b_ScheduledTaskMigrationStatus Report	19/10/2015 14:42	19/10/2015 14:42	Completed
B2b_ScheduledTaskMigrationStatus Report	19/10/2015 14:42	19/10/2015 14:42	Completed
B2b_ScheduledTaskMigrationStatus Report	19/10/2015 14:41	19/10/2015 14:41	Completed
B2b_ScheduledTaskMigrationStatus Report	19/10/2015 14:41	19/10/2015 14:41	Completed
B2b_ScheduledTaskMigrationStatus Report	19/10/2015 14:41	19/10/2015 14:41	Completed

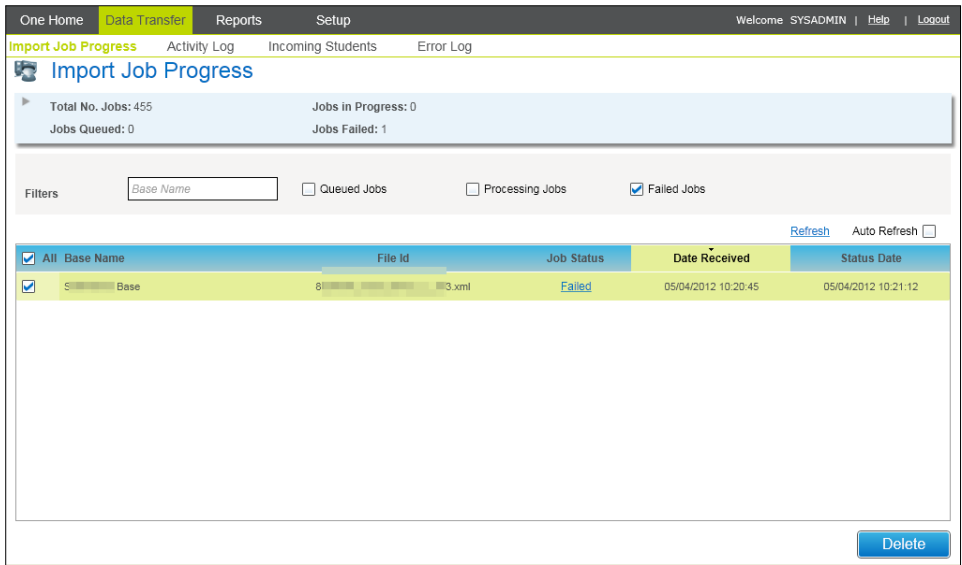
- Locate the report in the list and click the **View Report** icon (a folder with a green arrow) to display the report in your web browser.

Report Generated: 01/03/2016 15:33:24

B2B Attainment Results Not Imported Report

Import from 01/02/2016 to 01/03/2016

Base name	File name	Import date	Results not imported
Raji B2B Secondary base	8203333_rajiall aspects_010316_134151653_86.xml	01/03/2016 14:08:25	14366
Mithra base	8201133_MK1_010316_091034766_33.xml	01/03/2016 09:18:10	10349
Mithra base	8201133_MK1_010316_091234599_34.xml	01/03/2016 09:26:23	9872
Mithra base	8201133_MK5_010316_103045800_43.xml	01/03/2016 10:35:02	8932
Mithra base	8201133_MK5_010316_102845550_42.xml	01/03/2016 10:29:54	8932



NOTE: Any jobs in the Import Job Progress with a Job Status of **Completed** will be automatically deleted after 3 months.

Job Status

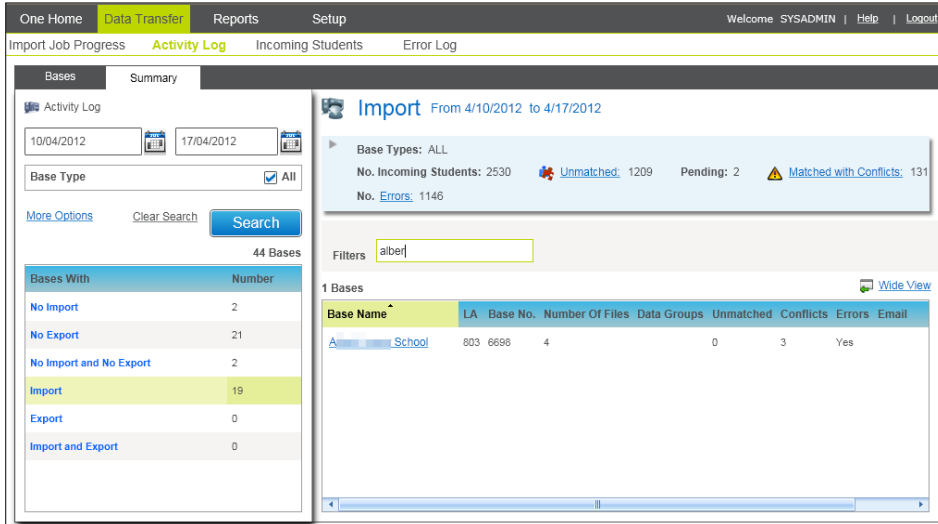
The Import Job Progress has various stages:

- **Queued.** The incoming file has been received and is queued waiting to be processed.
- **Processing Jobs.** When data is being processed according to the Data Processing Rules that have been set and any validations of business rules that need to be done.
- **Completed.** Once the incoming file has completed, this is where the file and all the data within that file has been processed, the record will be retained in the list and the next queued import will be processed.
- **Failed.** This is where for some reason the file could not be imported; please consult the Import Error Log for any associated Error messages.

B2B Activity Log

Data Transfer | Activity Log

The following screen allows you to view details of those Schools that have sent you information via B2B:Student including details of the last successful import.



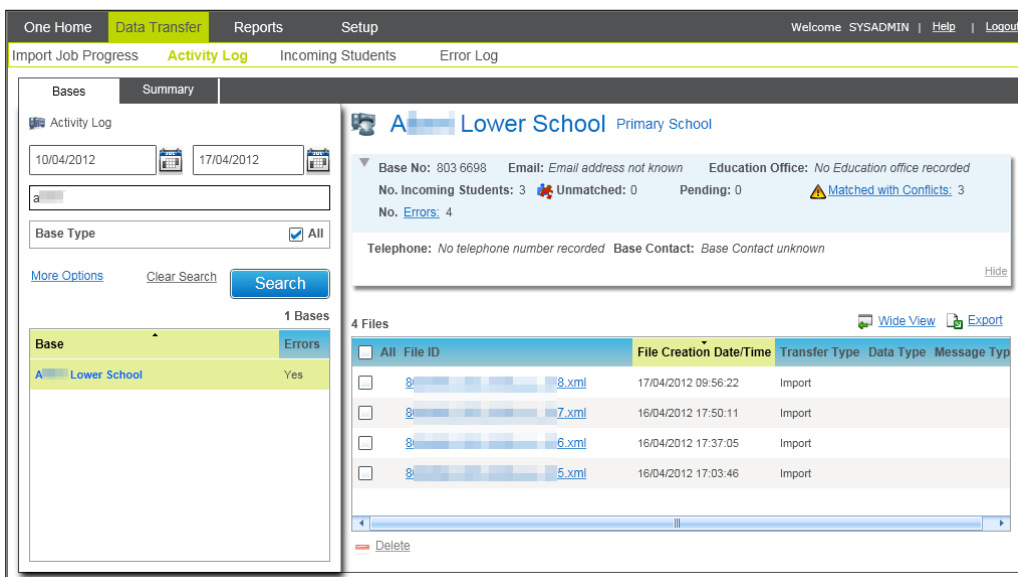
This area allows you to view records logged of all Import and Export activity. These records are stored in the CCS_DATA_CONFLICT_LOG table.

You will be able to view the Activity log at two levels:

- **Summary** – to give you an overall view of Imports/Exports to/from your Schools
- **Bases** – to enable you to view Activity Log entries for an individual School.

Activity Log – Summary Level

When first accessed, the Activity Log opens with the **Summary** tab with a Date Range set to the last seven days from the System Date and with **Bases With** option of ‘No Import’ highlighted by default. This will give you a list of those Bases for which no Import has been received within the last week.



The Search panel on the left allows you to amend the default Search Criteria by specifying a **From Date** (mandatory) and **To Date**:

Clicking the **Clear Search** link will remove any selections or values you have entered.

By default the **Base Type** search criteria is set to 'All'. However you will be able to filter this by clicking on the **More Options** link. This will enable you to select one or more **Base Types** as required by 'ticking' the relevant checkboxes in the **More Search Option** modal window.

You will also be able to filter the Search by **Education Office** if required.

Click the **Close** link or button to close the **More Search Options** dialog.

Clicking the **Clear Search** link will remove any selections made in the **More Search Options** area.

When the **Search** button is clicked the system will display the list of the available **Bases With** values of **No Import**, **No Export**, **No Import and No Export**, **Import**, **Export** and **Import and Export** in the **Search Results** panel and the number of **Bases** that satisfy the search criteria for each **Bases With** value.

Bases With	Number
No Import	2
No Export	19
No Import and No Export	2
Import	17
Export	0
Import and Export	0

The **Bases With** values will always be returned in the Search Results, but the numbers of **Bases** against each **Bases With** value will vary depending on the Search Criteria entered.

Note that, unlike other areas of B2B:Student, there is no checkbox available against an entry in the Search Results panel as the information displayed for each entry is different.

In order to view the list of **Bases** returned from the search for a particular **Bases With** value, you can highlight the required value in the Search Results panel.

The list of **Bases** retrieved based on the Search Criteria is defined as follows for each **Bases With** value:-

- **No Import** - Bases from which an Import has not been received by the LA for the Search Criteria specified
- **No Export** - Bases to which an Export has not been sent by the LA for the Search Criteria specified
- **No Import and No Export** – Bases from which an Import has not been received by the LA AND to which an Export has not been sent by the LA for the Search Criteria specified

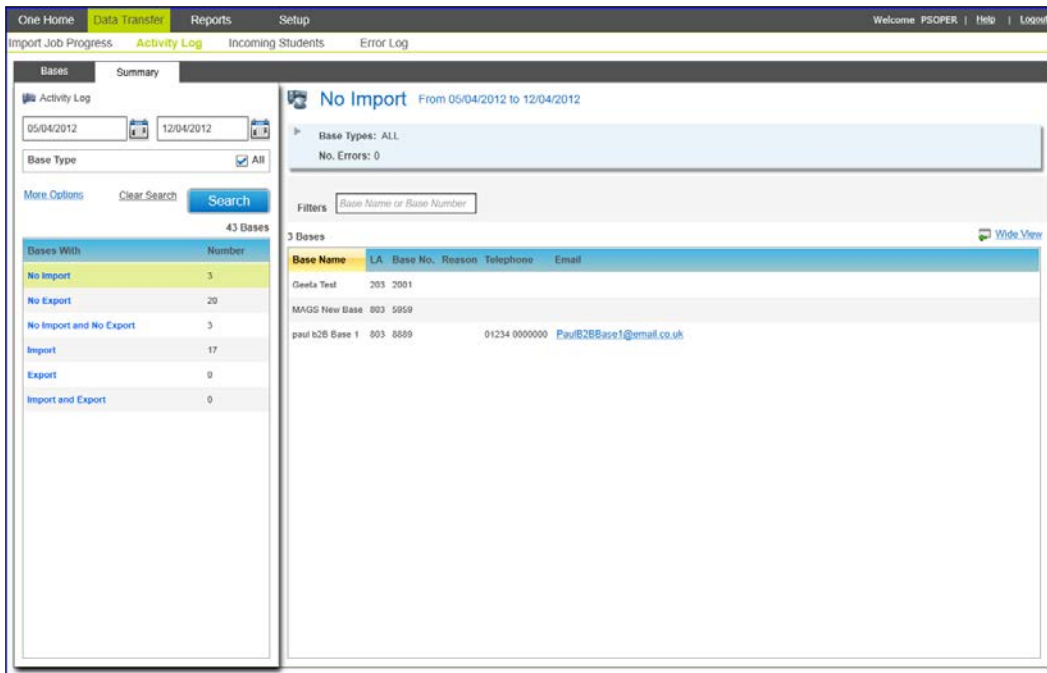
- **Import** - Bases from which an Import has been received by the LA for the Search Criteria specified
- **Export** - Bases to which an Export has been sent by the LA for the Search Criteria specified
- **Import and Export** – Bases from which an Import has been received by the LA AND to which an Export has been sent by the LA for the Search Criteria specified

Please note that the scope of Phase 1 of B2B:Student only includes Imports into the LA.

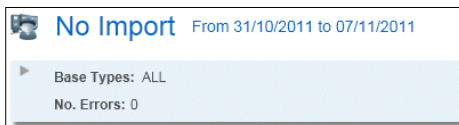
The system will display the list of Bases in a format dependent upon the **Bases With** value highlighted.

No Import/No Export/No Import and No Export

When one of these **Bases With** option is highlighted, the **Activity Log** Screen displayed is as follows (using the option of 'No Import' as an example):-



The system will identify the selected option in the header panel at the right hand top of the screen as shown by the typical example below:



In this example, the system will display the **Bases With** option highlighted together with the **From Date and To Date** and the total counts for the following:

- **Base Types** - the total number of Base Types selected in the Search Criteria. If all Base Types have been selected then this will show a count of 'ALL'
- **Errors** - the total number of Errors logged based on the Search Criteria entered.

The system will also return a list of **Bases** for the highlighted **Bases With** value based on the Search Criteria entered. Information similar to the **Bases With** example of 'No Import' will be displayed as follows:

No Import From 05/04/2012 to 12/04/2012

Base Types: ALL
No. Errors: 0

Filters

3 Bases [Wide View](#)

Base Name	LA	Base No.	Reason	Telephone	Email
G		2			
M		8			
P		8		01234 000000	P. @email.co.uk

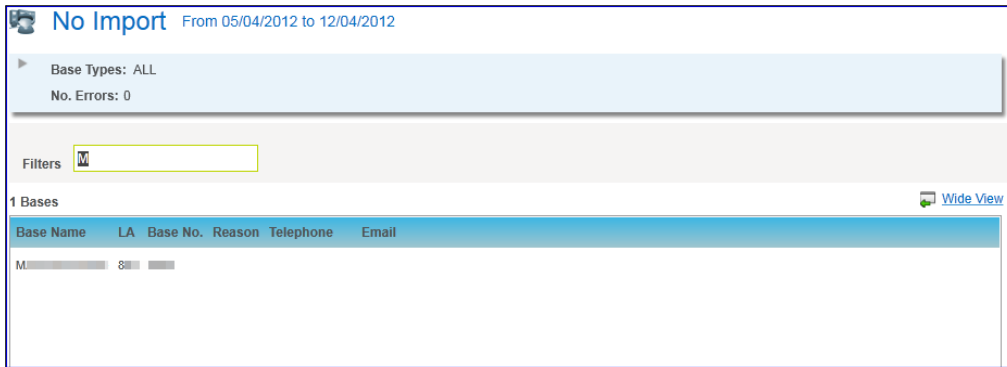
The following information is displayed in the list and includes some Base Contact information from One to assist you when contacting the Base:

- **Base Name**
- **LA Number**
- **School Number**
- **Reason** (this will not be populated for Phase 1)
- **Telephone** - as recorded against the Principal Site of the Base in One
- **Email Address** – as recorded against the Principal Site of the Base in One

Where the **Email Address** is shown, you will be able to click on the hyperlink – this will open a New Email window in your mail client to allow you to send an email directly to the Base if required.

The **Bases** are listed and displayed by default in **Base Name** ascending order. However all displays may be ordered on all populated columns using the 'click sort' functionality (*click sort functionality is where you order the browse in ascending or descending order - indicated by an arrow - by clicking the column header*).

You can also filter the list of Bases retrieved based on the search criteria using the **Filter** function. Entering the first few characters of a **Base Name** or **Base Number** will refresh the list of retrieved Bases to show just those Bases that begin with the characters entered.

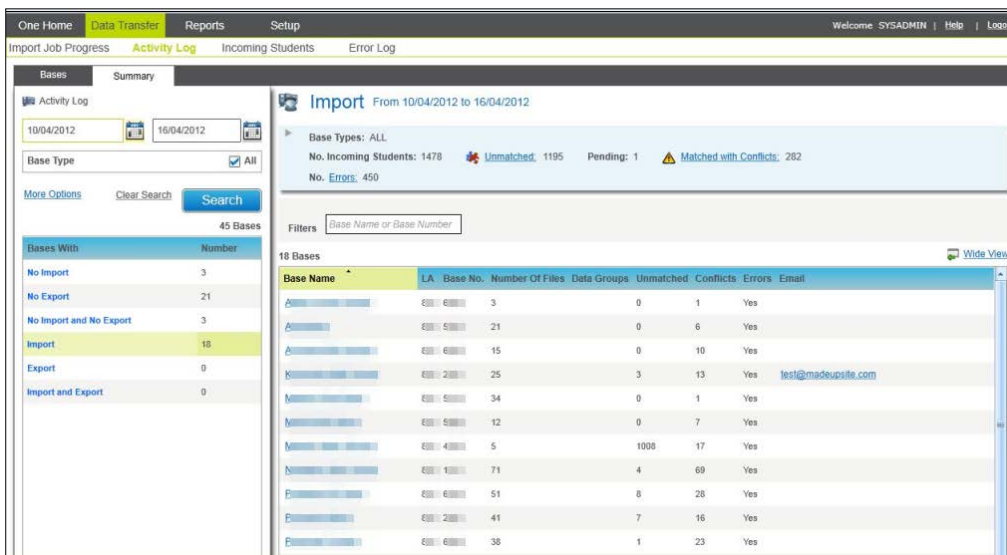


Clearing the filter will reset the list to show all retrieved Bases.

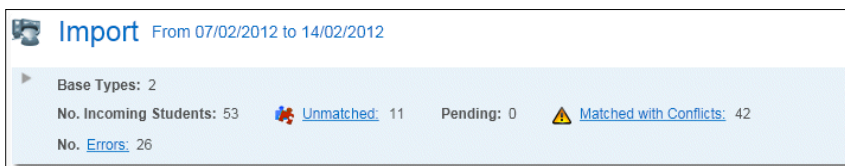
Click the **Wide View** hyperlink to see the list of Bases retrieved in a wide view if required.

Import/Export/Import and Export

When one of these **Bases With** option is highlighted, the Activity Log Screen displayed is as follows (using the option of 'Import' as an example):-



The system will identify the selected option in the header panel at the right hand top of the screen as shown by the typical example below:



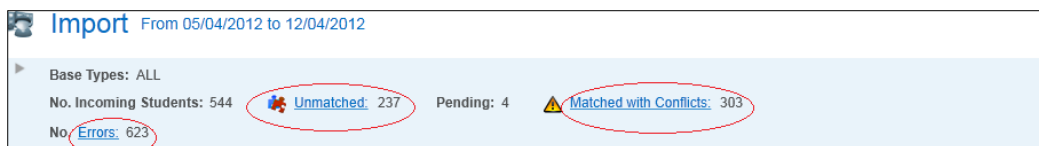
In this example, the system will display the **Bases With** option highlighted together with the **From Date and To Date** and the total counts for the following based upon the search criteria specified:

- **Base Types** - the total number of Base Types selected in the Search Criteria. If all Base Types have been selected then this will show a count of 'ALL'
- **No of Incoming Students** – i.e. the number of Students that are currently in the Incoming Students area
- **Unmatched** - the number of Students that have not been successfully matched by B2B:Student and therefore are recorded as Unmatched in the Incoming Students area.

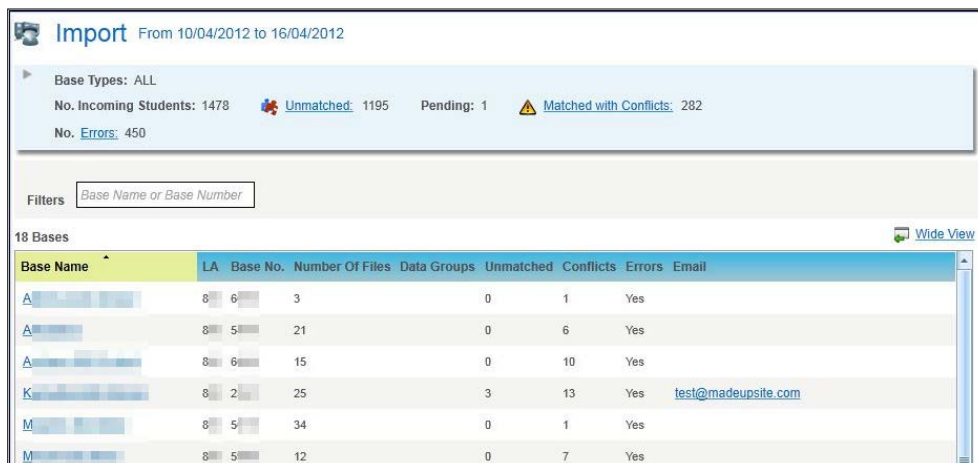
- **Pending** – the number of Students that have been successfully matched by B2B:Student but have not yet had the Data Processing Rules applied
- **Matched with Conflicts** – the number of Students that have been successfully matched by B2B:Student but have Data Conflicts.
- **Errors** – the number of Errors reported by B2B:Student.

If the totals for Unmatched and/or Matched with Conflicts are populated, hyperlinks are enabled to take you directly to the relevant Tab in Incoming Students for the Date Range selected and Bases listed. Please see the **Unmatched** and **Matched with Conflicts** sections below for further details.

If the total for Errors is populated, a hyperlink is enabled to take you directly to the Error Log for the Date Range selected and Bases Listed. Please see the **Error Log** section below for further details.



The system will also return a list of **Bases** for the highlighted **Bases With** value based on the Search Criteria entered. Information similar to the **Bases With** example of 'Import' will be displayed as follows:



The following information is displayed in the list:

- **Base Name**
- **LA Number**
- **Base No** - i.e. School Number
- **Number of Files**
- **Data Groups** (this will not be populated for Phase 1)
- **Unmatched** - the current number of Unmatched Students for the Base
- **Conflicts** - the current number of Matched Students with Conflicts for the Base
- **Errors** - whether there are any Errors logged for the Base
- **Email Address** – as recorded against the Principal Site of the Base in One

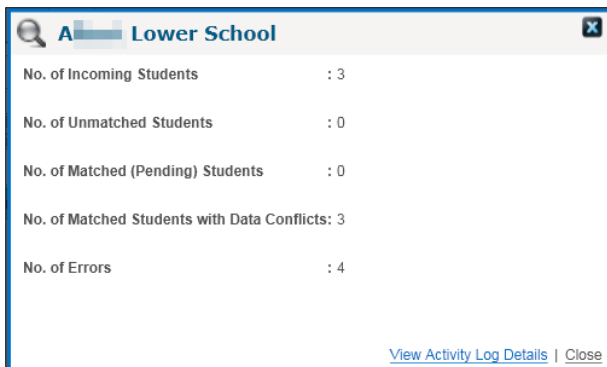
Data Transfer

The Bases are listed and displayed by default in **Base Name** ascending order. However all displays may be ordered on all populated columns using the 'click sort' functionality (*click sort functionality is where you order the browse in ascending or descending order - indicated by an arrow - by clicking the column header*).

You can also filter the list of Bases retrieved based on the search criteria using the **Filter** function. Entering the first few characters of a **Base Name** or **Base Number** will refresh the list of retrieved Bases to show just those Bases that begin with those characters entered.

Clicking **Wide View** hyperlink will allow you to see the list of Bases retrieved in a wide view if required.

The Base Names will be displayed as hyperlinks. Clicking a hyperlink will open a modal window to display a summary of transfer records for that Base. The following example is for a Base listed for the Bases With value of 'Import'.



Clicking the **View Activity Log Details** link within the modal window will take you to the Bases tab within the Activity Log; this will list all B2B Student Bases that have an 'Import' for the Date Range Selected. Selecting a Base will list all import files for the Base that fall within the date range specified. See **Activity Log – Bases Level** below for further information,

Where the Email Address is shown, you will be able to click on the hyperlink – this will open a New Email window in your mail client to allow you to send an email directly to the Base if required.

Activity Log – Bases Level

The Activity Log at Bases Level will enable you to view the files that have been imported or exported for each School meeting the search criteria entered.

The screenshot shows the "Activity Log" interface. The top navigation bar includes "One Home", "Data Transfer", "Reports", and "Setup". The user is logged in as "Welcome SYSADMIN". The main content area is titled "Activity Log" and shows a search for "Upper School" with a date range from 24/09/2012 to 01/10/2012. The search results show 1 Base: "Upper School" with "Yes" errors.

The selected base "Upper School" is shown in a summary view with the following details:

- Base No: 8
- Email: Email address not known
- Education Office: No Education office recorded
- No. Incoming Students: 1036
- Unmatched: . .
- Pending: 2
- Matched with Conflicts: 1020
- No. Errors: 640

Below the summary, there is a table of 7 files:

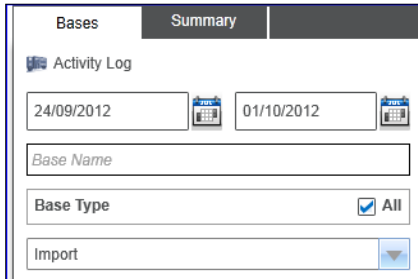
All	File ID	File Creation Date/Time	Transfer Type	Data Type	Message Type
<input type="checkbox"/>	8-2.xml	24/09/2012 12:42:21	Import		
<input type="checkbox"/>	8-1.xml	24/09/2012 12:35:58	Import		
<input type="checkbox"/>	8-0.xml	24/09/2012 12:19:22	Import		
<input type="checkbox"/>	8-9.xml	24/09/2012 11:48:55	Import		
<input type="checkbox"/>	8-8.xml	24/09/2012 11:05:43	Import		
<input type="checkbox"/>	8-7.xml	24/09/2012 09:57:12	Import		
<input type="checkbox"/>	8-6.xml	24/09/2012 09:23:44	Import		

At the bottom of the table, there is a "Delete" button.

The Search panel on the left allows you to amend your Search Criteria by specifying a **From Date** (mandatory) and **To Date**.

You can further refine your search by entering partial information in the Base Name search field.

You will be able to display the Schools that have **Imports**, **Exports** or **Imports and Exports** based on the search criteria entered by selecting the **Bases With** dropdown in the search panel (set to **Import** by default).



Clicking the **Clear Search** link will remove any selections or values you have entered.

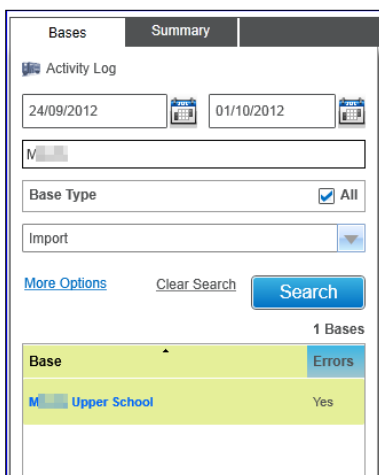
By default the **Base Type** search criteria is set to 'All'. However you will be able to filter this by clicking on the **More Options** link. This will enable you to select one or more **Base Types** as required by selecting the relevant check boxes in the **More Search Option** modal window.

You will also be able to filter the search by **Education Office** if required.

Click the **Close** link or button to close the **More Search Options** dialog.

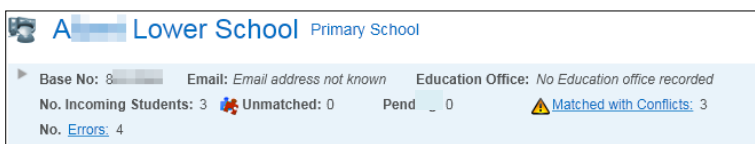
Clicking the **Clear Search** link will remove any selections made in the **More Search Options** area.

When the **Search** button is clicked the system will display the list of Bases in the Search Results panel meeting the Search Criteria entered and including a count of the number of bases retrieved.



The search results panel will display each **Base** retrieved from the Search together with an indication of any Errors logged for the Base.

When you highlight a **Base** in the Search Results panel, the system will display information about that Base in the header panel at the right hand top of the screen as shown by the typical example below:



Data Transfer

In this example, the system will display the **Base Name** and **Base Type** together with the following additional information about the Base:

- **Base No** - LA Number and School Number
- **Email Address** – as recorded against the Principal Site of the Base in One
- **Education Office**

By clicking on the arrow next to the Base No. you can additionally show/hide the following additional information about the highlighted Base:

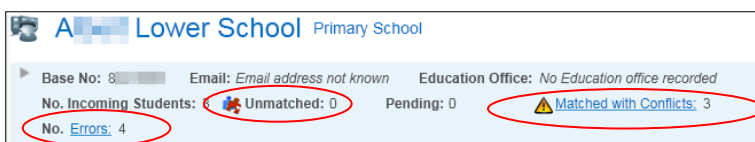
- **Telephone** - as recorded against the Principal Site of the Base in One
- **Base Contact** - the Person who is listed as a School Contact with the Role Code of 'Head' against the Base.

Also displayed are the total counts for the highlighted Base retrieved using the search criteria specified:

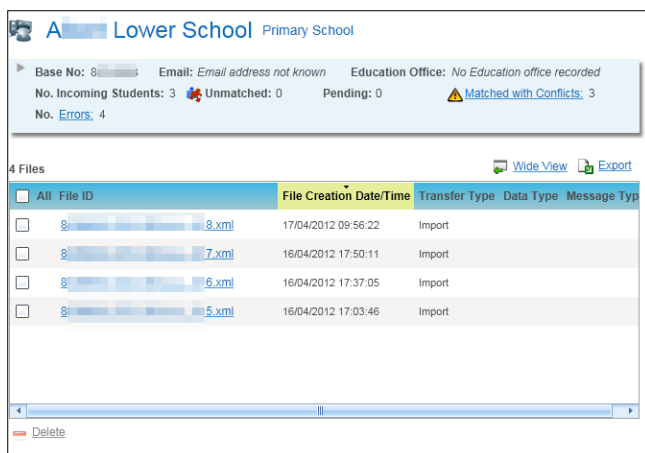
- **Import**
 - **No of Incoming Students** – i.e. the number of Students that are currently in the Incoming Students area
 - **Unmatched** - the number of Students that have not been successfully matched by B2B:Student and therefore are recorded as Unmatched in the Incoming Students area.
 - **Pending** – the number of Students that have been successfully matched by B2B:Student but have not yet had the Data Processing Rules applied
 - **Matched with Conflicts** – the number of Students that have been successfully matched by B2B:Student but have Data Conflicts.
- **Export**
 - **No. Students Exported** - i.e. the number of Students that have been exported for the highlighted School
- **Import and Export**
 - Both sets of counts for Import and Export displayed
- **All 'Bases With' Values**
 - **Errors** – the number of Errors reported by B2B:Student.

If the totals for Unmatched and/or Matched with Conflicts are populated, hyperlinks are enabled to take you directly to the relevant Tab in Incoming Students for the Date Range selected and Base highlighted. Please see the **Unmatched** and **Matched with Conflicts** sections below for further details.

If the total for Errors is populated, a hyperlink is enabled to take you directly to the Error Log for the Date Range selected and Base highlighted. Please see the **Error Log** section below for further details.



The system will also return a list of Files for the highlighted Base retrieved from the Search Criteria entered.



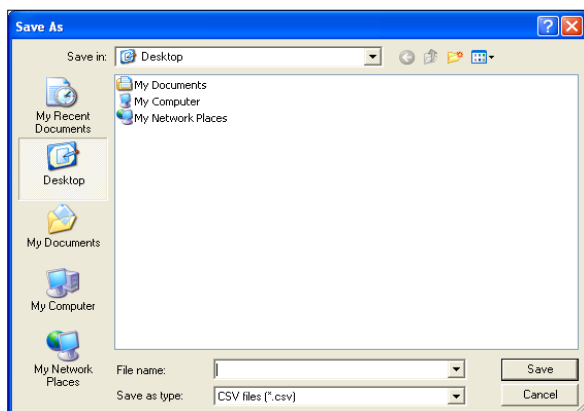
The following information is displayed in the list of Files:

- **File ID**
- **File Creation Date/Time**
- **Transfer Type**
- **Data Type** (this will not be populated for this Phase)
- **Message Type** (this will not be populated for this Phase)
- **Unmatched** - the current number of Unmatched Students for the Base
- **Conflicts** - the current number of Matched Students with Conflicts for the Base (import only)
- **Errors** - whether there are any Errors logged for the Base
- **Email Address** – as recorded against the Principal Site of the Base in One

The files are listed and displayed by default in File Creation Date/Time descending order (i.e. with the most recent files at the top). However all displays may be ordered on all populated columns using the 'click sort' functionality (*click sort functionality is where you order the browse in ascending or descending order - indicated by an arrow - by clicking the column header*).

Click the **Wide View** hyperlink to see the Unmatched Students Rules in a wide view.

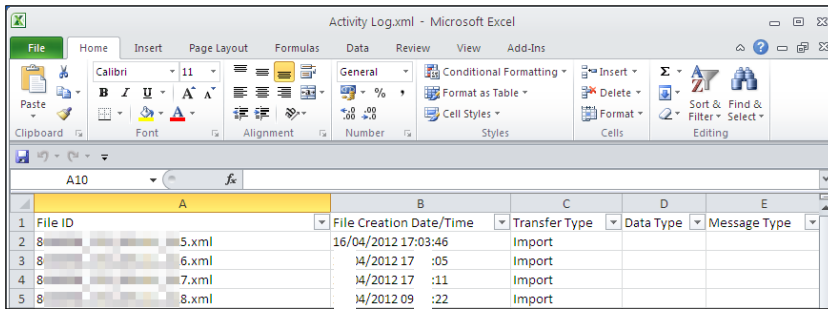
Clicking Export hyperlink will display the following dialogue on your machine.



You must define the filename and the type of file you wish to save as (this can be *.csv, *.xls or *.htm) and select where you wish to the file to be saved and then click **Save**.

The details in the grid will be saved in your preferred format including any details that cannot be viewed on the screen because they require scrolling through e.g.

Data Transfer



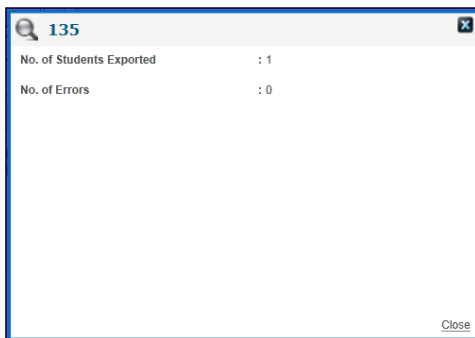
	A	B	C	D	E
1	File ID	File Creation Date/Time	Transfer Type	Data Type	Message Type
2	8	16/04/2012 17:03:46	Import		
3	8	14/2012 17 :05	Import		
4	8	14/2012 17 :11	Import		
5	8	14/2012 09 :22	Import		

NOTE: Once the results in the grid are saved in your preferred format then you will be able to modify or edit this as you wish.

You can filter for the Students records that have been retried based on your search criteria that you have defined.

The File ID will be displayed as a hyperlink. Clicking on a hyperlink will open a modal window to display a summary dialog for that file. This will show the following information depending upon the Transfer Type:

Import: Number of Incoming students, Unmatched Students, Matched (Pending) Students, Matched Students with Data Conflicts and the number of Errors.



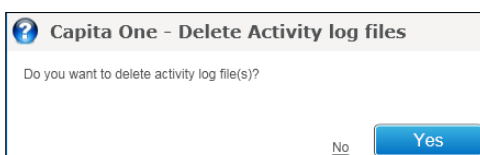
135	
No. of Students Exported	: 1
No. of Errors	: 0

If there are any errors associated with this specific file, a hyperlink is enabled to take you directly to the **Error Log** entries for that file. Please see the **Error Log** section for further details.

It will be possible to delete one or more file from the Activity Log – Bases level, but only if all Unmatched Students, Matched Students with Conflicts and Rejections for the File or Files selected have been resolved.

If a File has any Unmatched Students or Matched Students with Conflicts left in the Incoming Students area or any Rejected Data Items as highlighted in the Rejections Report, you will be prevented from selecting that File to be deleted. A tool tip will be displayed when you hover the cursor over the File ID to indicate this.

If a file has no Incoming Students or Rejections to resolve, then you will be able to delete it by selecting the File ID entry and clicking on **Delete** button. You will be presented with a message asking you to confirm that you wish to delete the selected File(s) and upon confirmation, a message will be displayed indicating that the files have successfully deleted.



Capita One - Delete Activity log files

Do you want to delete activity log file(s)?

No Yes

Incoming Students

Data Transfer | Incoming Students

This area allows you to view the records of Students that are **Unmatched**, **Matched with Conflicts** as well as allowing you to **Manage Incoming Students** for all Bases or particular Bases.

It allows you to specify the Bases you to view Student records that are **Unmatched** or **Matched with Conflicts** for by entering search criteria for a specific period, Base Name and/or Base Type. The date fields will initially display the current system date and the date seven days previous to this.

NOTE: Local Authorities can search for Bases by entering partial information for the Base Name and can define any period of time.

Clicking the **Clear Search** link will remove any selections or values you have entered.

Clicking the **More Options** link allows you to refine your criteria by Base Type, by default the 'All' checkbox will be selected but if you wish to select specific **Base Types** then select the relevant ones by 'ticking' one or more of the checkboxes in the **More Search Options** area.

Click the **Close** link or button to close the **More Search Options** dialog.

Clicking the **Clear Search** link will remove any selections made in the **More Options** area.

When the **Search** button is clicked the system will display the list of Bases that meet the criteria that have been defined, including a count of the number of Bases that have been retrieved.

19 Bases		Total
<input type="checkbox"/>	All Base	
<input checked="" type="checkbox"/>	823 [redacted] School Unmatched: 4 Pending: 0 Matched with Conflicts: 1012	1016
<input checked="" type="checkbox"/>	A [redacted] School Unmatched: 2 Pending: 0 Matched with Conflicts: 3	5
<input type="checkbox"/>	[redacted] Unmatched: 0 Pending: 0 Matched with Conflicts: 6	6
<input type="checkbox"/>	A [redacted] School Unmatched: 1 Pending: 1 Matched with Conflicts: 11	13

[Display Students](#)

The system will display the name of the Base along with details of how many Unmatched, Pending and Matched with Conflicts Student records are present for that Base and also the Total Number of Student records.

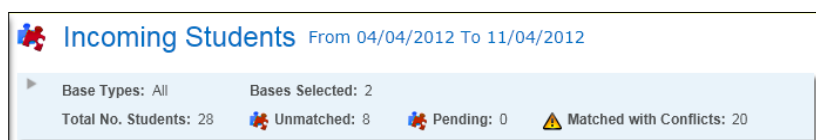
NOTE: By default when the system retrieves the list of Bases all of the checkboxes will be 'unticked'.

In order to view the Student records for a Base (or Bases) you must select the Base (or Bases) by selecting the checkbox next to the Base records and then click the **Display Students** button.

The header of the screen will refresh to display the details that have defined in the search including the **From** and **To** dates defined for the period and the total counts for the following:

- **Base Types** – the total number of Base Types selected

- **Base Selected** – the total number of Bases selected
- **Total No. of Students** – the total number of Student records that exist in either in the Unmatched. Matched with Conflicts areas or a in a state of Pending
- **Unmatched** – the total number of Student records that have not been automatically matched by the system (or added by the system) and therefore need to be manual added or matched
- **Pending** – the total number of Student records that are in a state of Pending (i.e. those Student records that were being processed when the search was initiated)
- **Matched with Conflicts** – the total number of Students that have been matched (this could be automatically by the system or manually by the user)



Unmatched

Data Transfer | Incoming Students | Unmatched

When a Student record is received from the School, the One system will try and identify a match for the incoming Student. This is done as follows:

- Unique Pupil Number plus three of the Student Identifiers, or
- No Unique Pupil Number then all four Student Identifiers

If a match is not found for a Student is not found as stated above and the **Add Students if Unmatched** checkbox in 'unticked' in the **Rules for Unmatched Records** tab (for a particular Base or Bases) then the incoming Student will be placed in the **Unmatched** area.

NOTE: For B2B:Student the Student Identifiers are Unique Pupil Number, Date of Birth, Family Name, Gender and Given Name.

The **Unmatched** tab allows you to deal with student data which has been imported and held in conflict because the import process could not match the incoming student details with an equivalent One student record.

When an incoming student matches an inactive student based on the criteria listed above, then the incoming student is still placed in the **Unmatched** tab. If an administrator has enabled the **Match only Active Students** system default option, when you select the student and click the **Match** button, a dialog displays warning that a match for the incoming student exists in One but is currently inactive.

The screenshot shows the 'Incoming Students' interface. On the left sidebar, there are three bases listed: 'anischool-1' (45 unmatched), 'B2B & Portal Base' (94 unmatched), and 'B2B Base Only' (935 unmatched). The main area displays filters for 'Surname or Forename', 'Base Name', 'NCY', 'Reg Group', 'File ID', 'Task Cohort', 'Task Data Type', 'DOB', 'UPN', and 'Post Code'. Below the filters, a table shows 91 unmatched students with columns for Name, UPN, Base Name, NCY, Reg. Grp, and File ID. A 'Wide View' link is visible above the table.

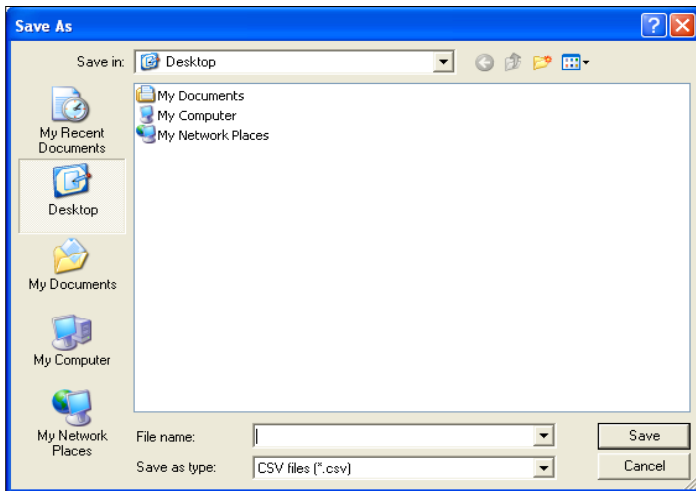
Click the **Wide View** hyperlink to see the Unmatched Students in a wide view.

Students with a status of Pending are displayed in the **Unmatched** tab (highlighted in red text). These students might have a match in the One database, but because they have a status of pending, One cannot match them automatically. Therefore, you can select a pending student and click the **Reprocess** button to try and force an auto-match. If this does not work, the student can be matched like any other student, by manually finding a match or adding them as a new student.

The screenshot shows the 'Incoming Students' interface for a different period. The sidebar shows two bases: 'Sameers B2B base - 1313' (2031 unmatched) and 'umab2b' (1867 unmatched). The main area shows filters and a table with 579 unmatched students. The table includes columns for Name, UPN, Base Name, NCY, Reg. Grp, File ID, File Creation Date/Time, File Import Date/Time, Scheduled Task Cohort, and Status. One student, 'Action, Stanley', is highlighted in yellow, indicating a 'Pending' status. At the bottom right, there are 'Reprocess' and 'Match' buttons.

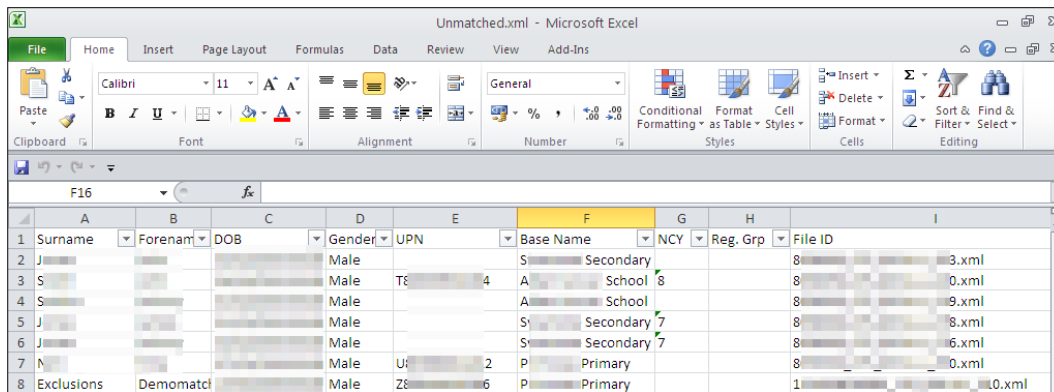
Data Transfer

Clicking the **Export** button will display the following dialog on your machine.



You must define the filename and the type of file you wish to save as (this can be *.csv, *.xls or *.htm) and select where you wish to the file to be saved and then click **Save**,

The details in the grid will be saved in your preferred format including any details that cannot be viewed on the screen because they need to be scrolled through e.g.



	A	B	C	D	E	F	G	H	I
	Surname	Forename	DOB	Gender	UPN	Base Name	NCY	Reg. Grp	File ID
1	J			Male		S	Secondary	8	3.xml
2	S			Male	T	A	School	8	0.xml
3	S			Male		A	School	8	9.xml
4	J			Male		S	Secondary	7	8.xml
5	J			Male		S	Secondary	7	6.xml
6	N			Male	U	P	Primary	8	0.xml
7	Exclusions	Demomatci		Male	Z	P	Primary	1	0.xml

NOTE: Once the results in the grid are saved in your preferred format then you will be able to modify or edit this as you wish.

You can filter for the Students records that have been retrieved based on the search criteria that you have defined.

There are two sets of filters available within the Unmatched tab:

Incoming Data Filters: These allow you to filter the list of Unmatched Students by pre-defined groups of Incoming Data (**Address, SEN, Leavers, Exclusions, Looked After**)

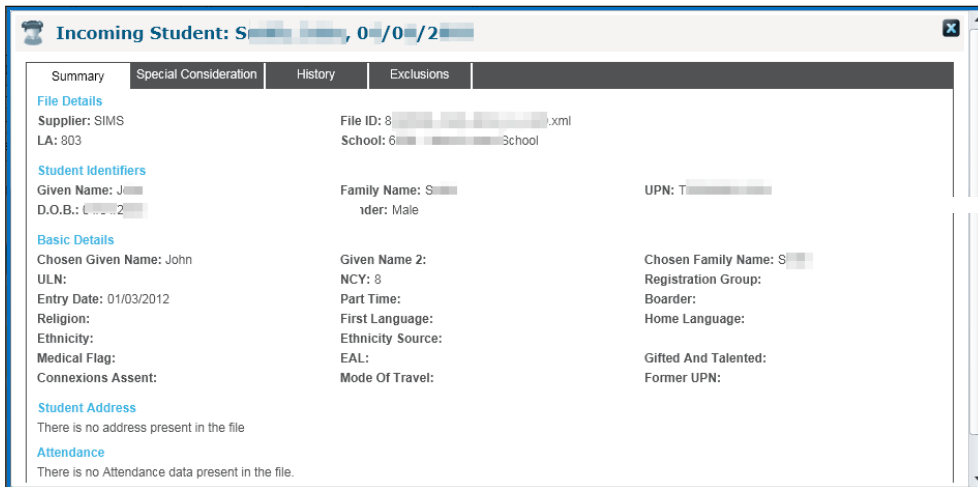
Filters: These allow you to filter the list of Unmatched Students by the columns contained in the Data Grid (**Surname or Forename, Base Name, NCY, Reg. Group and File ID, Task Cohort, Task Data Type**).

Selecting the **Clear Filters** link will remove all the filters you have defined for both the **Incoming Data Filters** and **Filters**.

The list will only show files with data according to the criteria selected. The number of Student records in the list is displayed below the filters.

The first column has a checkbox for all items listed; these may be checked individually or all selected by ticking the **All** checkbox. These may be unchecked by 'unticking' the **All** checkbox or similarly individually.

Clicking on the link for the Student’s Name in the list of retrieved Student records displays the following:



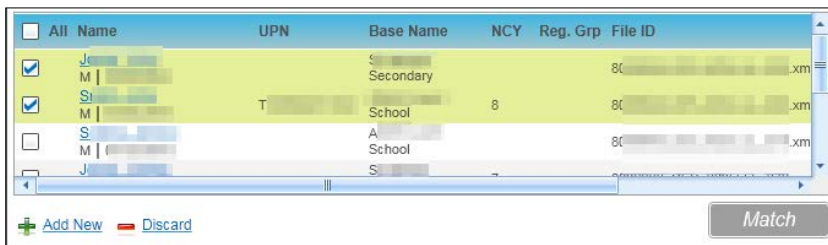
This allows you to view all the incoming data for the Unmatched Students that has been sent by selecting the following tabs: **Summary**, **Special Consideration**, **History** and **Exclusions**.

The following options are available in the Unmatched Students tab:-

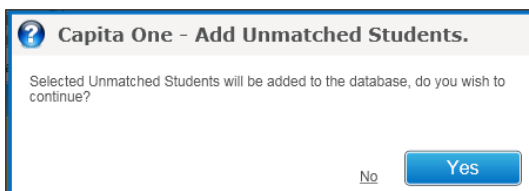
Add New

NOTE: The Add New option must be carefully considered to avoid duplicate Student records being created in One; therefore it is recommended that you initiate the **Match** to ensure that you have searched the system to ensure that the incoming Student is indeed a new Student and does not already exist in One.

Selecting one or more Student records will allow you to add these Students. If you wish to only add one Student record as new then only select the required Student record; alternatively you can select the **All** check box to select all the Student records that have been retrieved.



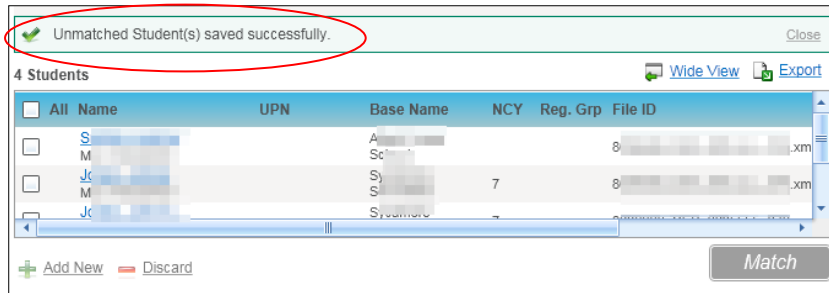
Clicking the **Add New** link will display the following message:



Selecting the **No** hyperlink will close the message box.

If the Yes button is clicked the system will create a new record for the incoming student record(s) that have been selected and a temporary message will be displayed informing you that the selected Students have been added successfully.

Data Transfer

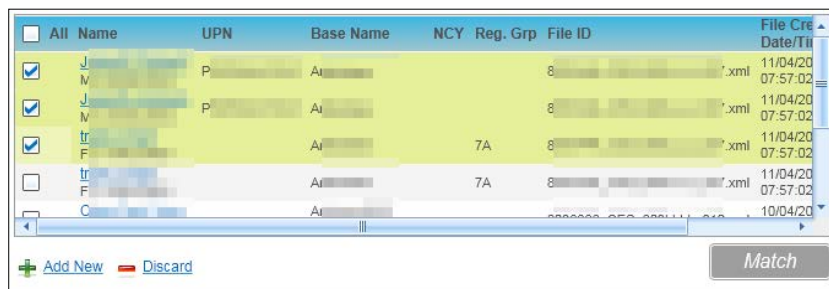


If the **No** hyperlink is selected then the system will cancel the adding of the selected Student records as new Students in One.

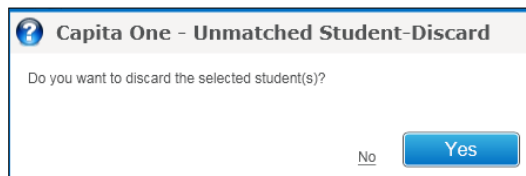
NOTE: In most cases when an incoming Student is added as a new Student in One then all the incoming data will also be updated and added to this Student record, regardless of the Data Processing Rules that have been defined.

Discard

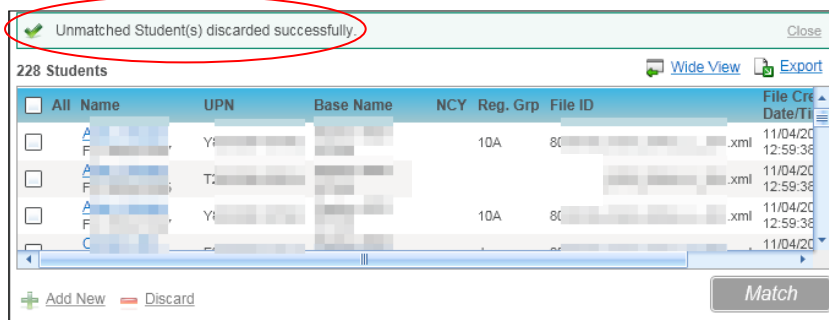
Select one or more Student records to discard these Students. If you wish to only add one Student record as new then only select the check box against the required Student record alternatively you can select the **All** check box to select all the Student records that have been retrieved.



Clicking the **Add New** link will display the following message:

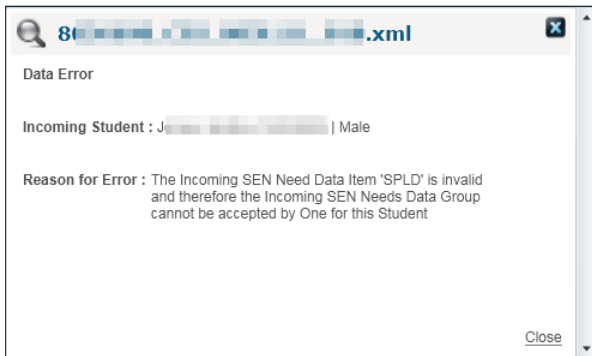


If the **Yes** button is clicked the system will create a new record for the incoming student record(s) that have been selected and a temporary message will be displayed informing you that the selected Students have been discarded successfully.



If the **No** hyperlink is selected then the system will cancel the discarding of the selected Student records and these will be retained in the Unmatched area.

The following is an example of the message that will be written to the Error Log for each Student discarded:



For more details on how errors will be displayed and view please refer to the topic **Error Log** on page 138.

Match

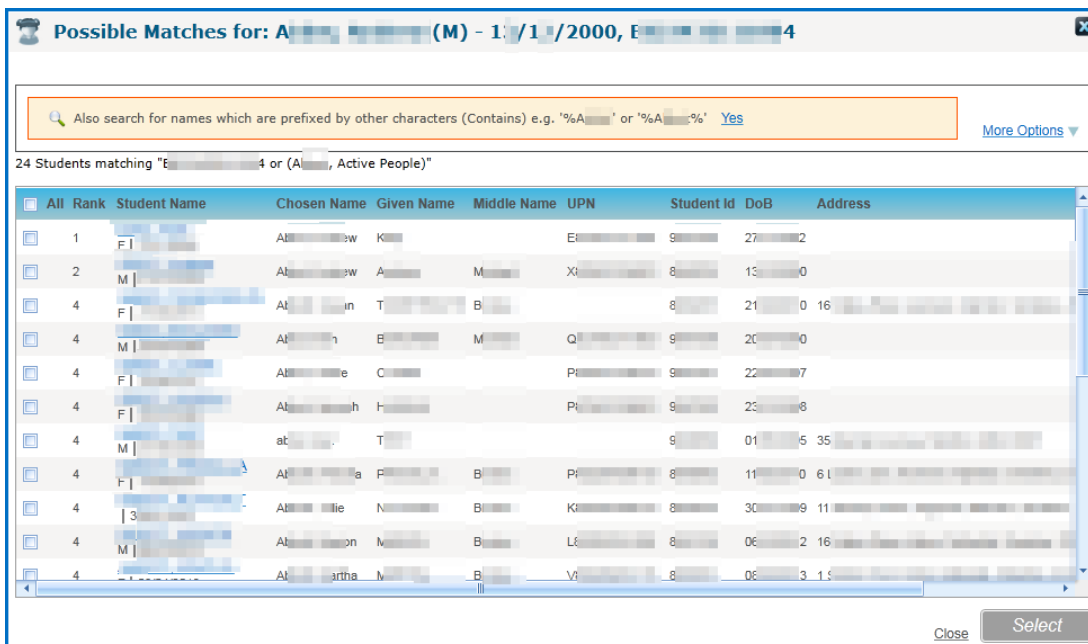
Selecting a student from the list displayed on the **Unmatched** enables the **Match** button. Clicking the **Match** button will open the **Possible Matches** dialog allowing you to attempt to manually match the unmatched student to an existing student on the One database.

NOTE: You will only be to select one Unmatched Student at a time to Match if more than one Student is selected then the **Match** button will be disabled.

When you click the **Match** button, an automatic search will be run using specific Items of the Incoming Data for the Student to determine Possible Matches for the Unmatched Student. This automatic search consists of two parts:

1. Search for active Students on One using the UPN (if it exists) belonging to the Incoming Student
2. Search for active Students on One using the Surname of the Incoming Student, this will include a search of the Name History for the Student.

Upon completion of the automatic search, the **Possible Matches** displays the result of the combined automatic search. To refine the list of returned students, you can click the **More Options** hyperlink to display more search criteria.

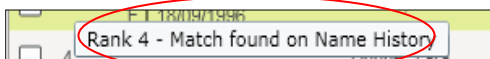


NOTE: The **Possible Matches for:** search window will initially only retrieve the first 200 Student records, therefore please ensure that you have scrolled through the list until the last record which will page and retrieve the next 200 Student records to ensure that you can find a possible match.

The results of the Automatic Search will be ranked to help the user determine the possible closest match to a Student in One as follows:

Rank	Description
Rank 1	The UPN for the incoming unmatched Student exactly matches a UPN for a Student in One listed in the Search Results
Rank 2	The Surname + DOB + Gender for the incoming unmatched Student exactly matches a Name + DOB + Gender for a Student in One listed in the Search Results There must be an exact Match on the Name The Name in the Search Results can be in any of the Name fields (Family Name, Given Name, Chosen Family Name, Chosen Given Name, Given Name 2)
Rank 3	The Surname + DOB + Gender for the incoming unmatched Student partially matches a Name + DOB + Gender for a Student listed in the Search Results There must be a partial Match on the Name, but exact match on the Date of Birth and Gender The Name in the Search Results can be in any of the Name fields (Family Name, Given Name, Chosen Family Name, Chosen Given Name, Given Name 2)
Rank 4	The Surname matches a Name (exactly or partially) that was recorded as a previous Name in the Name History for a Student listed in the Search Results
Rank 5	If the file contains an Address and Postcode for the incoming Student, the House No + first five characters of the Street of the incoming Address + Postcode or the House Name + first five characters of the Street of the incoming Address + Postcode or the Apartment + first five characters of the Street of the Incoming Address + Postcode matches any of the same combinations of the Correspondence Address for a Student listed in the Search Results.
Rank 6	If the file contains a Postcode for the incoming Student, this Postcode exactly matches the Postcode for a Student listed in the Search Results Any Students in One fulfilling the Automatic Search Criteria, but not meeting any of the Ranking Criteria above will be displayed in the Search Results after the Ranked entries. Once the Automatic Search has been run, it will be possible to run a subsequent Manual Student Search using the search criteria entry fields at the top of the Possible Matches Modal Window. If a suitable match to a Student in One is found, clicking on the Select button will manually match the Incoming Student to the selected Student in One and will import the Unmatched Student details, subject to the Data Processing Rules set up for each Data Item/Group.

If you hover over the Rank against the Student record a tool tip will be displayed and details of what the Student retrieved in the list has been matched on.



If you wish to redefine your search you can by entering values in the **Possible Matches for:** pop up window.

To clear the data that you have entered in the above fields select the **Clear Search** hyperlink.

The **Search** button will be disabled until you define a value for one of the following fields: Student Name or Unique Pupil Number, Student ID, NCY, DOB, Gender, Post Code, Base Name, URN or School No.

By default the search will be initiated on **Active Students only** but you can deselect this check box if you wish to search for a potential match in any 'inactive' Students. It will also be possible for you to search on Students with similar names in their name history by selecting the Include Name History check box.

Clicking the **Filter Base Suggestions** hyperlink will display the following:

You will be able to search for possible matches and filter by Base properties.

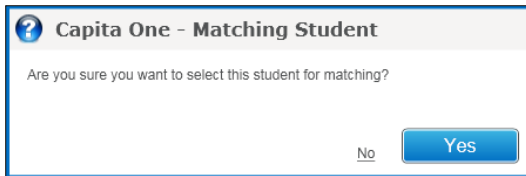
Click the **Close** link or button to close the **Filter Base Suggestions** dialog.

Once the list of possible matches have been retrieved by the system in the **Possible Matches for:** pop up window you can select the hyperlink under the Student Name column which will display the following screen which will allow to compare all the incoming data with the data held for the Student that you have selected as a possible match.

To go back to the previous screen click the **Back to Students List** hyperlink, alternatively you can click the close button.

Selecting the check box adjacent to a Student record in the **Possible Matches for:** pop up window will enable the **Select** button when this is selected the following message will be displayed:

Data Transfer



Clicking the **No** hyperlink will not create a match between the incoming Student and the Student you have selected.

Clicking the **Yes** button will create a match between the incoming Student and the Student that you have selected and it will be assumed that these two Students are the same Person and this Student record will be moved to the **Matched with Conflicts** tab if there are any Conflicts subject to the Data Processing Rules that have been set.

NOTE: You will only be able to select one Student in the **Possible Matches for:** pop up window which will allow you to match the incoming Student to the Student record that you have selected.

Once a match has been created then the system will check the Data Processing Rules that have been set up for the various Data Groups/Data Items and the incoming data will be processed accordingly. If the data has been placed in Conflict then this Student record will be moved to the **Matched with Conflicts** area.

If a match cannot be found click the **Close** link to return to the **Unmatched** tab.

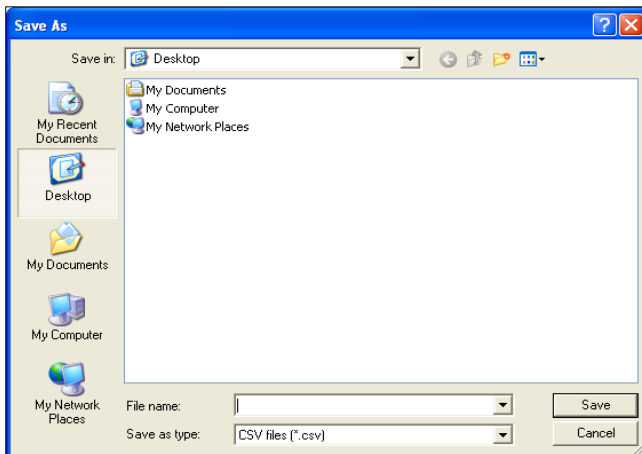
Matched with Conflicts

Data Transfer | Incoming Students | Matched with Conflicts

When a Student record is received from the School and this Student has been matched either manually or by the system but there are Conflicts between the incoming and current data then the Student record is placed in the **Matched with Conflicts** area.

Click the **Wide View** hyperlink to see the Unmatched Students in a wide view.

Clicking **Export** hyperlink will display the following dialog on your machine.



You must define the filename and the type of file you wish to save as (this can be *.csv, *.xls or *.htm) and select where you wish to the file to be saved and then click **Save**,

The details in the grid will be saved in your preferred format including any details that cannot be viewed on the screen because they need to be scrolled through e.g.

	A	B	C	D	E	F	G	H	I
1	Surname	Forename	DOB	Gender	UPN	Base Name	NCY	Reg. Grp	File ID
2	J	J		Male		S			8
3	F	A		Male		S			8
4	S	J		Male		A			8
5	S	J		Male		A	7		8
6	J	J		Male		S			8
7	J	J		Male		S			8
8	J	J		Male		S	7		8

NOTE: Once the results in the grid are saved in your preferred format then you will be able to modify or edit this as you wish.

You can filter for the Students' records that have been retrieved based on the search criteria that you have defined.

There are two sets of filters available within the Matched with Conflicts tab:

Data Conflict Filters: These allow you to filter the list of Unmatched Students by pre-defined groups of Incoming Data (**Names, Address, SEN, Leavers, Exclusions and Looked After**). Each of these is followed with a count of the total number in Conflict for each Data Group.

Filters: These allow you to filter the list of Unmatched Students by the columns contained in the Data Grid (**Surname or Forename, Base Name, NCY, Reg. Group, File ID, Task Cohort and Task Data Type**).

Selecting the **Clear Filters** link will remove all the filters you have defined for both the **Data Conflict Filters** and **Filters**.

Manage Data Conflicts is displayed by clicking a student hyperlink in the Incoming Students | Matched with Conflicts tab.

Manage Data Conflicts

Student Identifiers Conflict processing allows you to manually resolve any conflicts of Student Data for those whom a match has been found, either automatically or manually, and conflicts are found between the incoming (SIMS .net value) and current One data. It allows you to review the incoming data against that currently held in One and to choose which data you wish to accept, reject or discard. Where incoming data is accepted, the incoming value will update the One database. Where incoming data is rejected the One value will be captured in the Rejections Report when and if this is run.

Tabs where data is in conflict with the One values are coloured **RED**.

Select the link for the Student that you wish to process Conflicts for from the **Matched with Conflicts** area and the system will display the following **Manage Data Conflicts** screen which will allow you to process any Conflicts that exists for the Student:

Data Transfer

This is a tabbed dialog which will show pending data conflicts where the incoming data for the Student is different to the data that is held for the Student in One.

NOTE: The system will display the first tab that has a Conflict when you access the **Manage Data Conflicts** screen.

Any tabs that do not have any data in Conflict will be highlighted in **BLACK** and will still be accessible but will not display any data.

The tabs containing pending data in conflict are coloured **RED**. Each tab shows **Conflicting Items** and equivalent **One Record**. If the relevant field in One has an existing value for the Student, this will be displayed in the **One Record** panel.

If data exists for the One student the **One Record** panel allows you to expand each area by clicking the expand and collapse arrows.

	Expand arrow
	Collapse arrow

If the data displayed in the **One Record** panel is in conflict with the incoming data then this will be highlighted in **RED**.

Hovering over the **File Creation Date/Time** label will allow you to view the School that has sent the data that has been placed in Conflict.

Incoming Record	File Creation Date/Time	Reason	Accept	Discard	Reject
No	03/11/2010 15:16:39	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Primrose Primary 803 6688					

NOTE: The various tabs will display all the data that is in Conflict for the Student regardless of the School and file that it has been sent from.

The data tabs show Student **Identifiers, Basic Details, Address, Ethnicity, Exclusions, Looked After, School History, SEN Needs, Family, Carers** and **FSM**. Each tab will indicate the number of records in conflict for the selected Student for that data.

Identifiers (0)	Basic Details (1)	Address (0)	Ethnicity (0)	Exclusions (0)	Looked After (0)	School History (1)	SEN Needs (3)	Family (0)	Carers	FSM (0)
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Where there is data in conflict (tabs shown in **RED**) there are two options **Accept All Latest** and **Accept All LA Values**, clicking either of these will tick the appropriate **Accept** and/or **Discard** boxes.

- **Accept All Latest** – selecting this option will update the value in One with the latest incoming value for each incoming data in Conflict within that tab and discard the remaining.
- **Accept All LA Values** – selecting this option will discard all the incoming data in Conflict within that tab and discard the remaining.

 Where **Accept All Latest** is disabled it is because it is not logical to accept the data in conflict.

You will also be able to process the data individually by selecting:

- **Accept** – selecting this will allow you to update the Student's record with the incoming data and overwrite the data held in One. The data that you have 'accepted' will be removed from the relevant tab(s) from the **Manage Data Conflicts** screen.
- **Reject** – selecting this will allow you to Reject the incoming data and retain the data that you hold for the Student in One for the selected data (any Rejections from the Conflict will be captured by the **Rejections Report** if you wish to run it from the **Reports | All Reports** area). The data that you have 'rejected' will be removed from the relevant tab(s) from the **Manage Data Conflicts** screen.
- **Discard** – selecting this will allow you to Discard the incoming data and retain the data that you hold in One. The data that you have 'discarded' will be removed from the relevant tab(s) from the **Manage Data Conflicts** screen.

NOTE: If you select the **Discard** option the data will not be captured by the **Rejections Report**.

If you select the **Accept, Reject** or **Discard** options for a data item and this data item has duplicate records in Conflicts then when you select to **Apply** in the **Resolve Data Conflicts** pop up then the remaining duplicate records will be automatically discarded by the system.

To return to the Incoming Student page click the **Back to Matched with Conflicts** link.

Clicking the **Unmatch Student** link in the will display a message before unmatching the record.

Data Transfer

Unmatch Student: [Redacted]

You are about to unmatch a student from a record in One.

This will result in the incoming child going back to a status of unmatched. It is not possible as part of this process to undo changes that have already been processed on the One record. It is strongly recommended that you review the One record to ensure that the data held is accurate.

Do you wish to continue?

No

NOTE: When you select the **Unmatch Student** link this will unmatch the Student and place this Student back into the Unmatched area; however you will need to review the data that you may have 'accepted' for this Student as this cannot be reverted back to the original data that was held prior to you incorrectly matching the Student.

Base Name	LA No.	Sch No.	Type	Days per Week	Registered	Dual Registered
[Redacted]	Primary 8	[Redacted]	Primary School	5	Yes	No

The **Data Conflicts** button on the Student record in v3 will be enabled when there are Conflicts present for this Student in the v4 B2B:Student online area which will allow you to access the **Manage Data Conflicts** area in v4 B2B:Student online for this Student.

NOTE: A similar feature exists in the v4 Online A&T Back Office area.

Student Identifiers

If there are no Student Identifiers held in Conflict the tab label will be coloured **BLACK** and the message, “No data conflicts found for the selected data group” will be displayed.

You will be able to see the values held for the incoming Student for the data **One Record** panel within the **Student Identifiers** tab; any conflicts for the data with the will be displayed **RED** for that data item only.

Student Identifiers comprises **Given Name, Family Name, Date of Birth, Gender, and UPN.**

NOTE: You can process the data within the **Student Identifiers** tab independently.

Checking the **Accept** box and clicking **Apply** will display the **Resolved Data Conflicts – Student Identifiers** pop up window if you click the **Continue** button this will update the incoming value for the Student in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking **Apply** will display the **Resolved Data Conflicts – Student Identifiers** pop up window. You will be prompted to enter the reason.

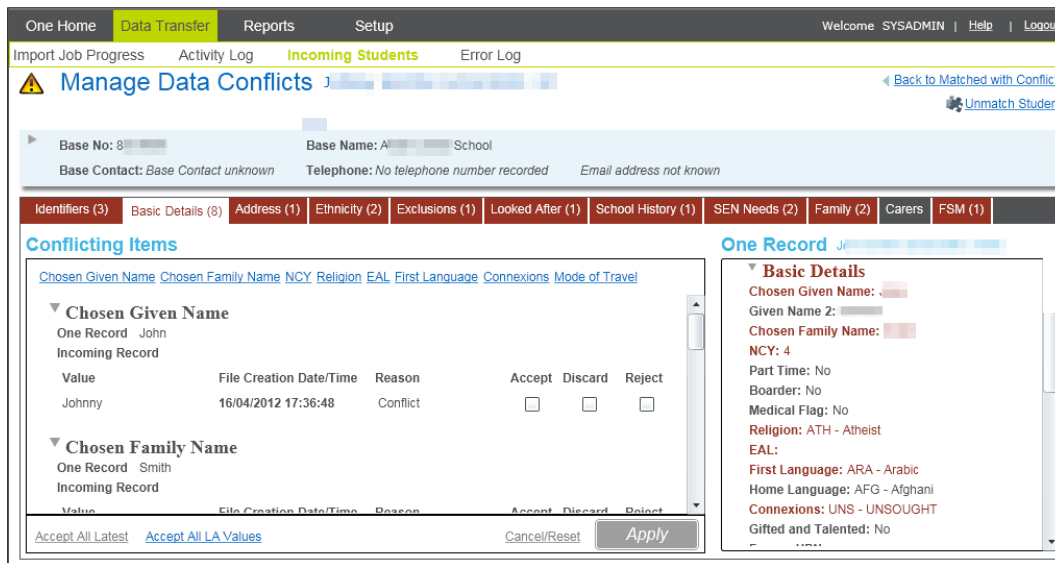
If you select the **Continue** button this will retain the current value for the Student in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The **Rejection Reason** you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **Student Identifiers** data that you select to **Reject**.

Checking the **Discard** box and clicking **Apply** will display the **Resolved Data Conflicts – Student Identifiers** pop up window if you click the **Continue** button will retain the current value for the Student in One; the selected data will be removed from the Conflict area.

NOTE: The **Apply** button is not enabled until **Accept, Discard or Reject** is selected.

Student Basic Details



If there are no Basic Details held in Conflict the tab label will be coloured **BLACK** and the message, “No data conflicts found for the selected data group” will be displayed.

You will be able to see the values held for the incoming Student for the data **One Record** panel within the **Basic Details** tab; any conflicts for the data with the will be displayed **RED** for that data item only.

Student Basic Details comprise **Chosen Given Name, Given Name 2, Chosen Family Name, NCY, Part Time, Boarder, Medical Flag, Religion, EAL, First Language, Home Language, Connexions, Gifted and Talented, Former UPN, ULN** and **Mode of Travel**.

NOTE: You can process the data within the **Basic Details** tab independently.

Checking the **Accept** box and clicking **Apply** will display the **Resolved Data Conflicts – Basic Details** pop up window if you click the **Continue** button this will update the incoming value for the Student in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking **Apply** will display the **Resolved Data Conflicts – Basic Details** pop up window. You will be prompted to enter the reason.

Rejection Reason (max. 300 characters)

If you click the **Continue** button this will retain the current value for the Student in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The Rejection Reason you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **Basic Details** data that you select to **Reject**.

Checking the **Discard** box and clicking **Apply** will display the **Resolved Data Conflicts – Student Basic Details** pop up window if you click the **Continue** button will retain the current value for the Student in One; the selected data will be removed from the Conflict area.

NOTE: The **Apply** button is not enabled until **Accept, Discard** or **Reject** is selected.

Address

If there are no Address Details held in Conflict the tab label will be coloured **BLACK** and the message, “No data conflicts found for the selected data group” will be displayed.

You will be able to see the values held for the incoming Student for the data **One Record** panel within the **Address** tab; any conflicts for the data with the will be displayed **RED** for that data item only.

Checking the **Accept** box and clicking **Apply** will display the **Resolved Data Conflicts – Address** pop up window if you click the **Continue** button this will update the incoming value for the Student in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking **Apply** will display the **Resolved Data Conflicts – Address** pop up window. You will be prompted to enter the reason.

If you click the **Continue** button this will retain the current value for the Student in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The Rejection Reason you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **Address** data that you select to **Reject**.

Checking the **Discard** box and clicking **Apply** will display the **Resolved Data Conflicts – Address** pop up window if you click the **Continue** button will retain the current value for the Student in One; the selected data will be removed from the Conflict area.

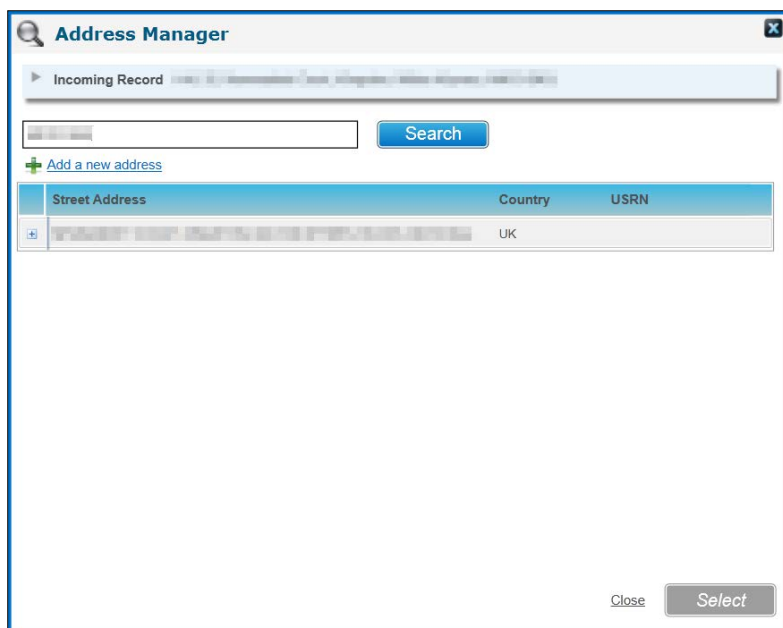
NOTE: The **Apply** button is not enabled until **Accept**, **Discard** or **Reject** is selected.

Manually Matching an Address

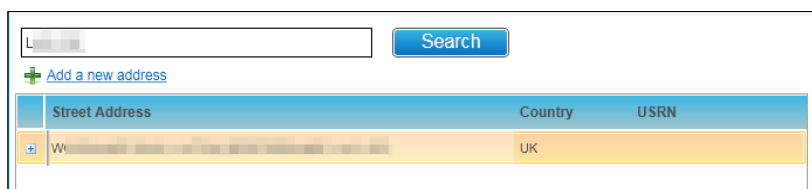
This scenario describes where the incoming address could not be auto-matched with a One address.

If the incoming address does not exist in the One address database, checking the **Accept** box opens the **Address Manager** giving you the option to either match the incoming address to the One Address database or **Add** it as a new address to the database.

Matching the Address allows you to either match to an existing Address.



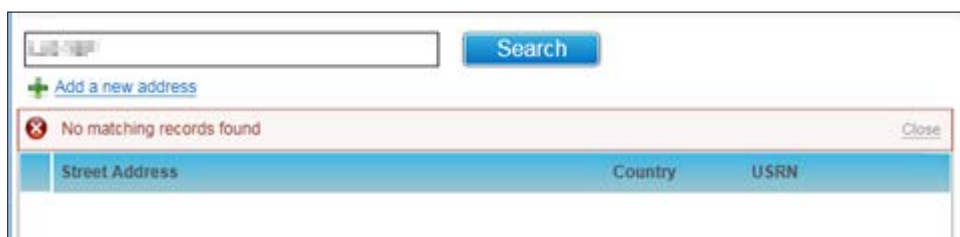
You can view all the Dwelling but expanding the Street by clicking on + button next to the Street details of the Address.



Click the **Select** button to select the Address you wish to add for the Student; you will need to then select the **Apply** button in the **Manage Data Conflicts** area and then the **Continue** button in the **Resolved Data Conflicts – Address** pop up so that it can be linked to the Student.

Adding an Address

If an incoming address cannot be matched to an address in the One database it must be added.



Click the **Add a New Address** link. The system will display the following screen pre populated with the incoming Address; you will be able to edit the data in the fields or add additional details like the USRN, UPRN, UPRN, Easting and /or Northing.

The screenshot shows the 'Address Manager' window with the following fields:

- Fiat Name: 22
- Building Name: [Redacted]
- Telephone: [Redacted]
- Street Name 2: [Redacted]
- District/Village: [Redacted]
- B: [Redacted]
- L: [Redacted]
- Country: [Dropdown]
- LA: [Dropdown]
- USRN: [Redacted]
- UPRN: [Redacted]
- OSAPR: [Redacted]
- Easting: [Redacted]
- Northing: [Redacted]
- In England:

Buttons: Cancel, Save, View On Map

Once you have added the Address Click the **Select** button to select the Address you wish to add for the Student; you will need to then select the **Apply** button in the **Manage Data Conflicts** area and then the **Continue** button in the **Resolved Data Conflicts – Address** pop up so that it can be added linked to the Student.

NOTE: The **Address** and the accompanying details that are displayed in the above screen will be the **Address Details** area of the **Address Manager** screen will be added into **One** therefore make sure that you are happy with this information before you select the **Save** button.

Ethnicity

The screenshot shows the 'Manage Data Conflicts' window for 'Ethnicity'. The 'Conflicting Items' table is as follows:

Value	File Creation Date/Time	Reason	Accept	Discard	Reject
BAOF	16/04/2012 17:36:48	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The 'One Record' panel shows the following details:

- Identifiers**
- Basic Details**
- Address**
- Ethnicity**
 - Code: AIN
 - Description: AIND - Indian
 - Source: O - Other (or not known)
- Exclusions**
- Looked after**
- School History**

Buttons: Accept All Latest, Accept All LA Values, Cancel/Reset, Apply

If there are no Ethnicity Details held in Conflict the tab label will be coloured **BLACK** and the message, "No data conflicts found for the selected data group" will be displayed.

You will be able to see the values held for the incoming Student for the data **One Record** panel within the **Ethnicity** tab; any conflicts for the data with the will be displayed **RED** for that data item only.

Student Ethnicity Details comprise **Ethnicity** and **Ethnicity Source**.

NOTE: You can process the data within the **Ethnicity** tab independently.

Data Transfer

Checking the **Accept** box and clicking **Apply** will display the **Resolved Data Conflicts – Ethnicity** pop up window if you click the **Continue** button this will update the incoming value for the Student in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking **Apply** will display the **Resolved Data Conflicts – Ethnicity** pop up window. You will be prompted to enter the reason.

Rejection Reason (max. 300 characters)

If you click the **Continue** button this will retain the current value for the Student in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The Rejection Reason you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **Ethnicity** data that you select to **Reject**.

Checking the **Discard** box and clicking **Apply** will display the **Resolved Data Conflicts – Ethnicity** pop up window if you click the **Continue** button will retain the current value for the Student in One; the selected data will be removed from the Conflict area.

NOTE: The **Apply** button is not enabled until **Accept**, **Discard** or **Reject** is selected.

Exclusions

The screenshot shows the 'Manage Data Conflicts' interface. The 'Exclusions' tab is selected, displaying a table with the following data:

File Creation Date/Time	Start Date	Start Time	End Date	Reason	Category
16/04/2012 17:36:48	02/04/2012	AM	05/04/2012	Term not defined for Base	FIXD

Buttons at the bottom include 'Accept All LA Values', 'Cancel/Reset', and 'Apply'.

If there are no Exclusion Details held in Conflict the tab label will be coloured **BLACK** and the message, “No data conflicts found for the selected data group” will be displayed.

You will be able to see the values held for the incoming Student for the data in the **One Record** panel within the **Exclusions** tab; any conflicts for the data will be displayed in **RED** for that data item only.

Resolve Data Conflict - Exclusions

Incoming Record
 Start Date: 02/04/2012, Start Time: AM, End Date: 05/04/2012, Reason: VA - Vrb abse / threat behav ai, Category: FIXD - Fixed Period
 Base Name: A School

Start Date	Start Time	End Date	Reason	Category	Base Name	Match

Alternative Action
 Add New Discard Reject

Cancel Confirm

Select the Resolve Link to display the **Resolved Data Conflicts – Exclusions** pop up window.

Checking the **Accept** box and clicking **Confirm** button will close the pop up selecting the **Apply** button will display the **Resolved Data Conflicts – Exclusions** pop up window if you click the **Continue** button this will update the incoming value for the Student in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking **Confirm** button will close the pop up selecting the **Apply** button will display the **Resolved Data Conflicts – Exclusions** pop up window. You will be prompted to enter the reason.

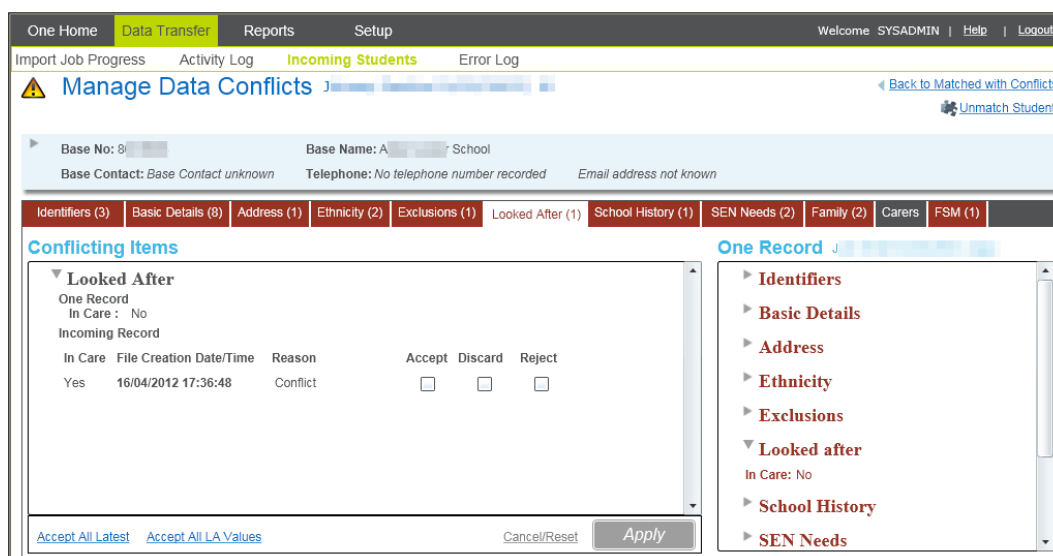
Rejection Reason (max. 300 characters)

If you click the **Continue** button this will retain the current value for the Student in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The Rejection Reason you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **Exclusions** data that you select to **Reject**.

Checking the **Discard** box and clicking **Confirm** button will close the pop up selecting the **Apply** button will display the **Resolved Data Conflicts – Exclusions** pop up window if you click the **Continue** button will retain the current value for the Student in One; the selected data will be removed from the Conflict area.

Looked After



If there are no Looked After Details held in Conflict the tab label will be coloured **BLACK** and the message, “No data conflicts found for the selected data group” will be displayed.

You will be able to see the values held for the incoming Student for the data **One Record** panel within the **Looked After** tab; any conflicts for the data will be displayed in **RED** for that data item only.

Checking the **Accept** box and clicking **Apply** will display the **Resolved Data Conflicts – Looked After** pop up window if you click the **Continue** button this will update the incoming value for the Student in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking **Apply** will display the **Resolved Data Conflicts – Looked After** pop up window. You will be prompted to enter the reason.

Rejection Reason (max. 300 characters)

If you click the **Continue** button this will retain the current value for the Student in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The Rejection Reason you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **Looked After** data that you select to **Reject**.

Checking the **Discard** box and clicking **Apply** will display the **Resolved Data Conflicts – Looked After** pop up window if you click the **Continue** button will retain the current value for the Student in One; the selected data will be removed from the Conflict area.

NOTE: The **Apply** button is not enabled until **Accept**, **Discard** or **Reject** is selected.

School History

If there are no School History Details held in Conflict the tab label will be coloured **BLACK** and the message, “No data conflicts found for the selected data group” will be displayed.

Student School History Details comprise **Base Name, Start Date, End Date, Reason for Joining, Reason for Leaving, Reg, Dual, Guest** and **Registration Type**.

You will be able to see the values held for the incoming Student for the data **One Record** panel within the **School History** tab; any conflicts for the data will be displayed in **RED** for that data item only.

Select the Resolve link to display the **Resolve Data Conflicts – School History** pop up window.

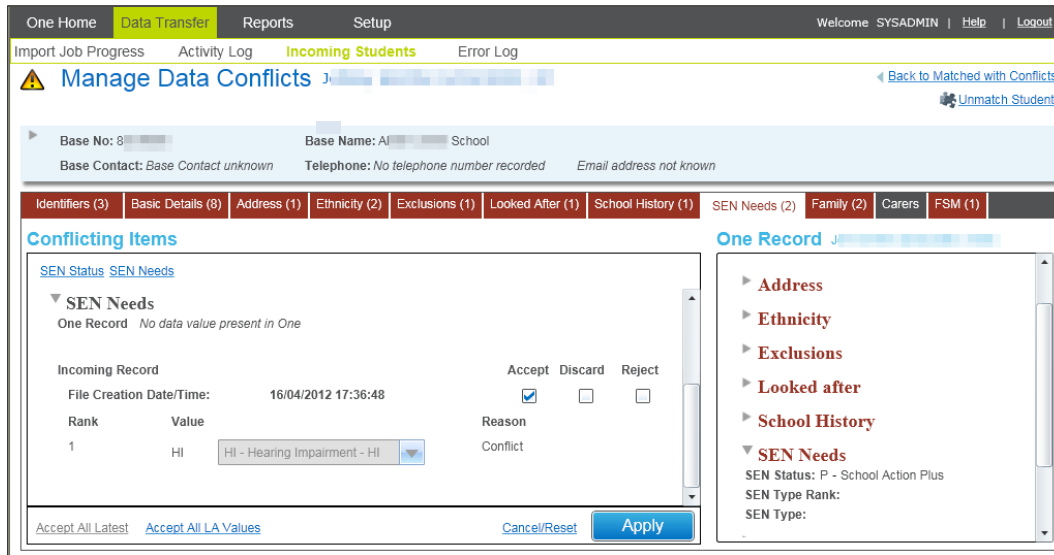
Checking the **Match** box and click the **Confirm** button will allow you to match the incoming School History record to an existing School History record held for the Student in One. When you select the **Confirm** button any incoming information will be updated for the existing School History record.

Checking the **Add New** box and clicking **Confirm** button will close the pop up selecting the **Apply** button will display the **Resolved Data Conflicts – School History** pop up window if you click the **Continue** button this will allow you to create a new School History record for the Student in One; the selected data will be removed from the Conflict area.

NOTE: You will not be able to **Reject** the Incoming School History details since the Schools own this information.

Checking the **Discard** box and clicking **Confirm** button will close the pop up selecting the **Apply** button will display the **Resolved Data Conflicts – School History** pop up window if you click the **Continue** button will retain the current value for the Student in One; the selected data will be removed from the Conflict area.

SEN Needs



If there are no SEN Needs Details held in Conflict the tab label will be coloured **BLACK** and the message, “No data conflicts found for the selected data group” will be displayed.

You will be able to see the values held for the incoming Student for the data **One Record** panel within the **SEN Needs** tab; any conflicts for the data with the will be displayed **RED** for that data item only.

Student Ethnicity Details comprise **SEN Stage** and **SEN Needs** and **Rank**.

NOTE: You can process the **SEN Stage** and **SEN Needs** data within the **SEN Needs** tab independently.

Checking the **Accept** box and clicking **Apply** will display the **Resolved Data Conflicts – SEN Needs** pop up window if you click the **Continue** button this will update the incoming value for the Student in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking **Apply** will display the **Resolved Data Conflicts – SEN Needs** pop up window. You will be prompted to enter the reason.

Rejection Reason (max. 300 characters)

If you click the **Continue** button this will retain the current value for the Student in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The Rejection Reason you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **SEN Needs** data that you select to **Reject**.

Checking the **Discard** box and clicking **Apply** will display the **Resolved Data Conflicts – SEN Needs** pop up window if you click the **Continue** button will retain the current value for the Student in One; the selected data will be removed from the Conflict area.

NOTE: The **Apply** button is not enabled until **Accept**, **Discard** or **Reject** is selected.

Family

If there are no Family Details held in Conflict the tab label will be coloured **BLACK** and the message, “No data conflicts found for the selected data group” will be displayed.

You will be able to see the values held for the incoming Student for the data **One Record** panel within the **Family** tab; any conflicts for the data with the will be displayed **RED** for that data item only.

Family Details comprise **Service Family** and **Source**; **Traveller Family**, **Start Date**, **End Date**, **Status**, **Source**, **Site Type** and **Mobility**.

Checking the **Accept** box and clicking **Apply** will display the **Resolved Data Conflicts – Family** pop up window if you click the **Continue** button this will update the incoming value for the Student in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking **Apply** will display the **Resolved Data Conflicts – Family** pop up window. You will be prompted to enter the reason.

Rejection Reason (max. 300 characters)

If you click the **Continue** button this will retain the current value for the Student in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The Rejection Reason you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **Family** data that you select to **Reject**.

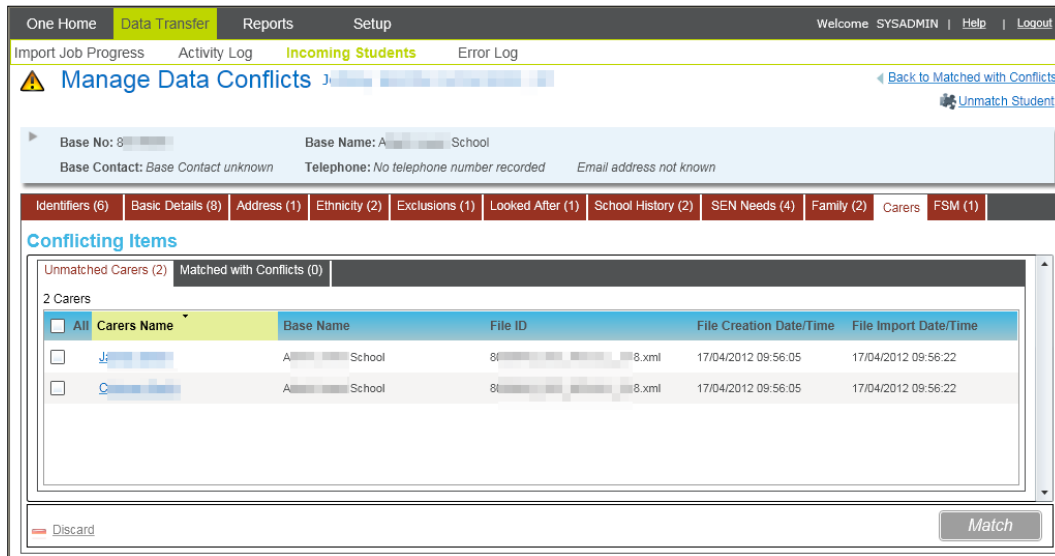
Checking the **Discard** box and clicking **Apply** will display the **Resolved Data Conflicts – Family** pop up window if you click the **Continue** button will retain the current value for the Student in One; the selected data will be removed from the Conflict area.

NOTE: The **Apply** button is not enabled until **Accept**, **Discard** or **Reject** is selected.

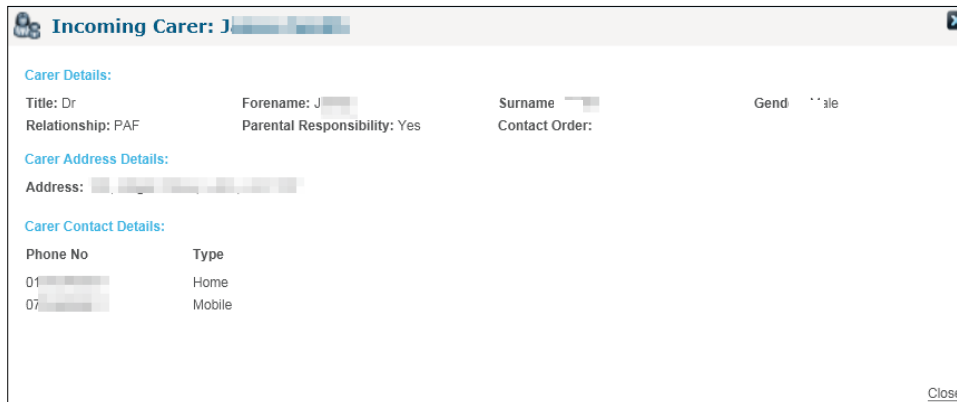
Carers

The **Carers** tab is split into two additional tabs:

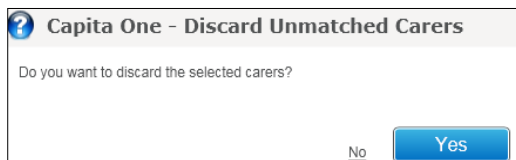
- **Unmatched Carers** – this tab will contain any Carers that could not have been matched to a person in One.
- **Matched with Conflicts** – this tab will contain Carers that have been matched by the system but there are Conflicts between the incoming data and the data held for the Carers in One.



Clicking the link in the Carers Name column will allow you to view all the incoming data for the incoming Carer:



Selecting the check box next to one or more Carer records will enable the **Discard** link and **Match** buttons. Clicking the **Discard** button will display the following message:



If you select **No** then the message box will be close; if you select **Yes** then the incoming selected Carer record(s) will be discarded and removed from the **Unmatched Carers** tab.

Match

Selecting a student from the list displayed on the **Unmatched Carers** tab will enable the **Match** button. Clicking the **Match** button will open the **Possible Matches for** dialog allowing you to attempt to manually match the Unmatched Carer to an existing Person on the One database.

NOTE: You will only be able to select one Unmatched Carer at a time to Match. If more than one Carer is selected then the **Match** button will be disabled.

When you click the **Match** button, an automatic search will be run using specific Items of the Incoming data for the Carer to determine Possible Matches for the Unmatched Carer. This automatic search will consist of the following:

Search for active People on One using the Surname of the Incoming Carer, this will include a search of the Name History for the Carer.

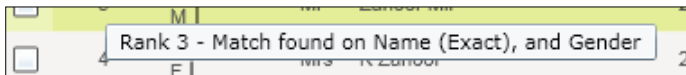
NOTE: The **Possible Matches for:** search window will initially only retrieve the first 200 Person records; please ensure you have scrolled through the list until the last record which will page and retrieve the next 200 Person records to ensure that you can find a possible match.

The results of the Automatic Search will be ranked to help the user determine the possible closest match to a Person in One as follows:

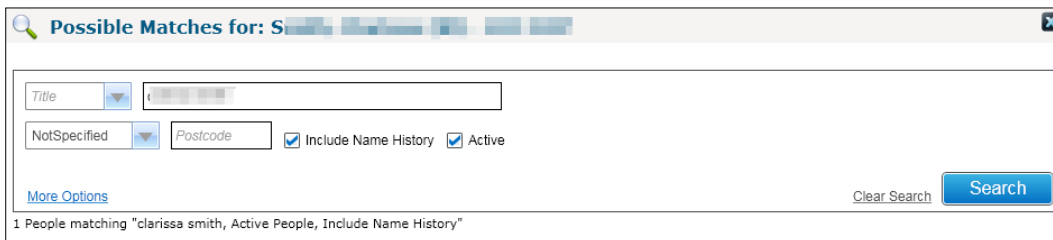
Rank	Description
Rank 1	<p>The Title + Surname + Gender + Postcode for the incoming unmatched Carer exactly match a Title + Name + Gender + Postcode for a Person listed in the Search Results.</p> <p>There must be an exact Match on the Name.</p> <p>The Name in the Search Results can be in any of the Name fields (Family Name, Given Name, Chosen Family Name, Chosen Given Name, Given Name 2).</p>
Rank 2	<p>The Surname + Gender + Postcode for the incoming unmatched Carer exactly matches a Name + Gender + Postcode for a Person listed in the Search Results</p> <p>There must be an exact Match on the Name</p> <p>The Name in the Search Results can be in any of the Name fields (Family Name, Given Name, Chosen Family Name, Chosen Given Name, Given Name 2)</p>
Rank 3	<p>The Surname + Gender for the incoming unmatched Carer exactly matches a Name + Gender for a Person listed in the Search Results</p> <p>There must be an exact Match on the Name</p> <p>The Name in the Search Results can be in any of the Name fields (Family Name, Given Name, Chosen Family Name, Chosen Given Name, Given Name 2)</p>

Rank	Description
Rank 4	The Surname for the incoming unmatched Carer exactly matches a Current Name for a Person listed in the Search Results There must be an exact match on the Name The Name in the Search Results can be in any of the Name fields (Family Name, Given Name, Chosen Family Name, Chosen Given Name, Given Name 2).
Rank 5	The Surname for the incoming unmatched Carer partially matches a Current Name for a Person listed in the Search Results There must be a partial match on the Name The Name in the Search Results can be in any of the Name fields (Family Name, Given Name, Chosen Family Name, Chosen Given Name, Given Name 2).
Rank 6	The Surname does not match the Current Name (exactly or partially) but does match (exactly or partially) a Name that was recorded as a previous Name in the Name History for a Person listed in the Search Results

If you hover over the Rank against the Person record a tool tip will be displayed and details of what the Carers retrieved in the list has been matched on.



If you wish to redefine your search you can by entering values in the **Possible Matches for:** pop up window.

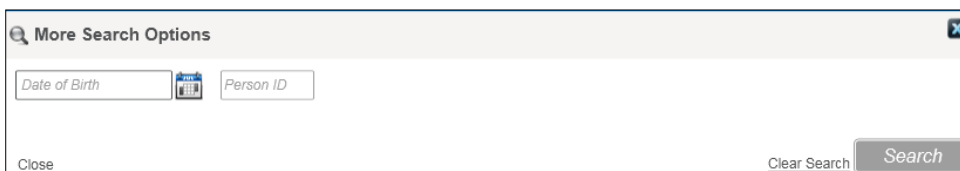


To clear the data that you have entered in the above fields select the **Clear Search** hyperlink.

The **Search** button will be disabled until you define a value for one of the following fields: Title, Carer Name, Gender and Post Code.

By default the search will be initiated on Active People only but you can deselect this check box if you wish to search for a potential match in any 'inactive' People. It will also be possible for you to search on People with similar names in their name history by selecting the **Include Name History** check box.

Clicking the **More Options** hyperlink will display the following:



You will be able to search for possible matches and filter by Date of Birth and Person ID.

Click the **Close** link or button to close the **More Search Options** dialog.

Once the list of possible matches have been retrieved by the system in the **Possible Matches for:** pop up window you can select the hyperlink under the Carers Name column which will display the following screen which will allow to compare all the incoming data for the Carer against the data held for the Person that you have selected as a possible match.

To go back to the previous screen select the **Back to Carers List** hyperlink, alternatively you can select the close button.

Selecting the checkbox next to a Carer record in the **Possible Matches for:** pop-up window will enable the **Select** button when this is selected the following message will be displayed:

Clicking the No hyperlink will not create a match between the incoming Carer and the Person you have selected.

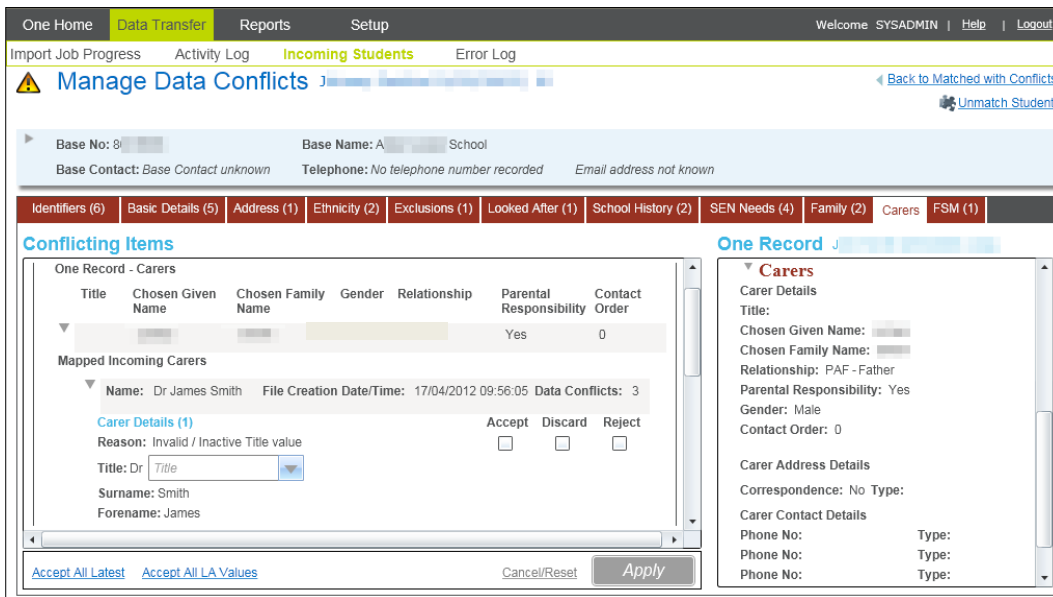
Clicking the **Yes** button will create a match between the incoming Carer and the Person that you have selected and it will be assumed that these two Carers are the same Person and this Carer record will be moved to the **Matched with Conflicts** tab (within the **Carers** tab) if there are any Conflicts subject to the Data Processing Rules that have been set.

NOTE: You will only be able to select one Person in the **Possible Matches for:** pop up window which will allow you to match the incoming Carer to the Person that you have selected.

Once a match has been created then the system will check the Data Processing Rules that have been set up for the various Data Groups/Data Items and the incoming data will be processed accordingly. If the data has been placed in Conflict then this Carer record will be moved to the **Matched with Conflicts** area (within the **Carers** tab).

If a match cannot be found click the **Close** link to return to the **Unmatched Carers** tab.

Carer Details



Checking the **Accept** box and clicking **Confirm** button will close the pop up selecting the **Apply** button will display the **Resolved Data Conflicts – Carers** pop up window if you click the **Continue** button this will update the incoming value for the Carer in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking **Confirm** button will close the pop up selecting the **Apply** button will display the **Resolved Data Conflicts – Carers** pop up window. You will be prompted to enter the reason.

Rejection Reason (max. 300 characters)

If you click the **Continue** button this will retain the current value for the Carer in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The Rejection Reason you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **Carer Details** data that you select to **Reject**.

Checking the **Discard** box and clicking **Confirm** button will close the pop up selecting the **Apply** button will display the **Resolved Data Conflicts – Carers** pop up window if you click the **Continue** button will retain the current value for the Carer in One; the selected data will be removed from the Conflict area.

Address

You will be able to see the values held for the incoming Student for the data **One Record** panel within the **Address** tab; any conflicts for the data will be displayed **RED** for that data item only.

Checking the **Accept** box and clicking **Apply** will display the **Resolved Data Conflicts – Carers** pop up window. If you click the **Continue** button this will update the incoming value for the Carer in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking **Apply** will display the **Resolved Data Conflicts – Carers** pop up window. You will be prompted to enter the reason.

If you click the **Continue** button this will retain the current value for the Carer in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The *Rejection Reason* you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **Carer Address** data that you select to **Reject**.

Checking the **Discard** box and clicking **Apply** will display the **Resolved Data Conflicts – Carers** pop up window if you click the **Continue** button will retain the current value for the Student in One; the selected data will be removed from the Conflict area.

NOTE: The **Apply** button is not enabled until **Accept**, **Discard** or **Reject** is selected.

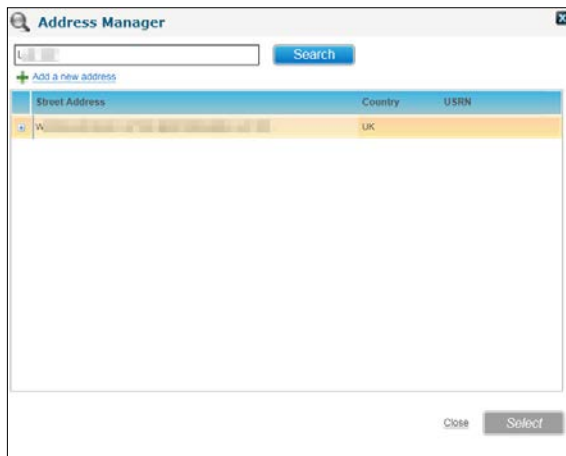
Manually Matching an Address

This scenario describes where the incoming address could not be auto-matched with a One address.

If the incoming address does not exist in the One address database, checking the **Accept** box opens the **Address Manager** giving you the option to either match the incoming address to the One Address database or **Add** it as a new address to the database.

Matching the Address allows you to either match to an existing Address.

Data Transfer



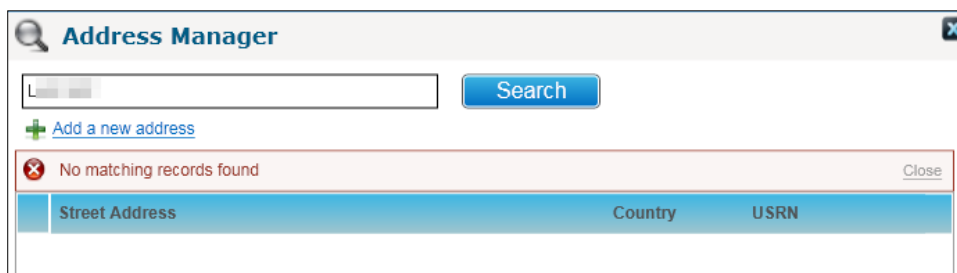
You can view all the Dwellings by expanding the Street by clicking on + button next to the Street details of the Address.



Click the **Select** button to select the Address you wish to add for the Student; you will need to then select the **Apply** button in the **Manage Data Conflicts** area and then the **Continue** button in the **Resolved Data Conflicts – Address** pop up so that it can be linked to the Student.

Adding an Address

If an incoming address cannot be matched to an address in the One database it must be added.



Click the **Add a New Address** link to display the following screen prepopulated with the incoming Address; you will be able to edit the data in the fields or add additional details such as the USRN, UPRN, UPRN, Easting and /or Nothing.

The screenshot shows the 'Address Manager' window with the following fields:

- Flat Name: 22
- Building Name: [Redacted]
- Telephone: [Redacted]
- Street Name 2: [Redacted]
- District/Village: [Redacted]
- Country: LA
- USRN: [Redacted]
- UPRN: [Redacted]
- OSAPR: [Redacted]
- Easting: [Redacted]
- Northing: [Redacted]
- In England:

Buttons: Cancel, Save

Once you have added the Address, click the **Select** button to select the Address you wish to add for the Carer; you will need to then select the **Apply** button in the **Matched with Conflicts** area and then the **Continue** button in the **Resolved Data Conflicts – Carers** pop up so that it can be added linked to the Student.

NOTE: The Address and the accompanying details that are displayed in the above screen will be the Address Details area of the Address Manager screen will be added into One therefore make sure that you are happy with this information before you select the **Save** button.

Carer Contact Details

The screenshot shows the 'Manage Data Conflicts' window with the following sections:

- Base Information:** Base No: 8, Base Name: A School, Base Contact: Base Contact unknown, Telephone: No telephone number recorded, Email address not known.
- Conflicting Items:**

Incoming Record	Reason	Accept	Discard	Reject
Corresp. <input type="checkbox"/> Type: Home Address		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Details (1)				
One Record				
Phone No. Type				
Incoming Record				
Phone No. Type Reason		Accept	Discard	Reject
0 Mobile Conflict		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- One Record - Carers:**
 - Carer Details: Title, Chosen Given Name, Chosen Family Name, Relationship: PAF - Father, Parental Responsibility: Yes, Gender: Male, Contact Order: 0
 - Carer Address Details: Correspondence: No Type
 - Carer Contact Details: Phone No. Type

Buttons: Accept All Latest, Accept All LA Values, Cancel/Reset, Apply

Checking the **Accept** box and clicking **Confirm** button will close the pop up selecting the **Apply** button will display the **Resolved Data Conflicts – Carers** pop up window if you click the **Continue** button this will update the incoming value for the Carer in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking **Confirm** button will close the pop up.

Selecting the **Apply** button will display the **Resolved Data Conflicts – Carers** pop up window. You will be prompted to enter the reason.

Data Transfer

Rejection Reason (max. 300 characters)

If you click the **Continue** button this will retain the current value for the Carer in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The Rejection Reason you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **Carer Contact Details** data that you select to **Reject**.

Checking the **Discard** box and clicking **Confirm** button will close the pop up. Selecting the **Apply** button will display the **Resolved Data Conflicts – Carers** pop up window. If you click the **Continue** button it will retain the current value for the Carer in One; the selected data will be removed from the Conflict area.

FSM

One Record	Date of Change	FSM Eligibility	File Creation Date/Time	Reason	Accept	Discard	Reject
Incoming Record	16/04/2012	Yes	16/04/2012 17:36:48	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Checking the **Accept** box and clicking **Confirm** button will close the pop up selecting the **Apply** button will display the **Resolved Data Conflicts – FSM** pop up window if you click the **Continue** button this will update the incoming value for the Student in One; the selected data will be removed from the Conflict area.

Checking the **Reject** box and clicking the **Confirm** button will close the pop up selecting the **Apply** button will display the **Resolved Data Conflicts – FSM** pop up window. You will be prompted to enter the reason.

Rejection Reason (max. 300 characters)

If you click the **Continue** button this will retain the current value for the Student in One and will reject the incoming data; the selected data will be removed from the Conflict area.

NOTE: The Rejection Reason you have entered including the incoming data and the data that is held currently in One for the Student will be captured by the **Rejections Report** for the **Exclusions** data that you select to **Reject**.

Checking the **Discard** box and clicking the **Confirm** button will close the pop up. Selecting the **Apply** button will display the **Resolved Data Conflicts – FSM** pop up window. If you click the **Continue** button it will retain the current value for the Student in One; the selected data will be removed from the Conflict area.

Example of when you select ‘Accept’ and select Apply

When you select the **Continue** button, the Student’s record is updated with the values displayed under **Accepted Values**. These values and any duplicate records will also be removed for the appropriate tab in the **Manage Data Conflicts** area.

Resolved Data Conflicts - Basic Details

Accepted Values

Chosen Given Name - [redacted]
 Chosen Family Name - [redacted]
 NCY - 7
 Connexions - YES
 Mode of Travel - Bus (type not known)

Where duplicates exist for data items Accepted these will be automatically discarded. These changes cannot be undone. Do you wish to continue? Cancel Continue

Example of when you select ‘Discard’ and select Apply

When you select the **Continue** button the values displayed under **Discarded Values** will be removed from the Conflicts area; the Student’s data for these will not be updated. These values and any duplicate records will also be removed for the appropriate tab in the **Manage Data Conflicts** area.

Resolved Data Conflicts - Identifiers

Discarded Values

Incoming Record - 17/04/2012 09:56:05
 Given Name - [redacted]
 Incoming Record - 17/04/2012 09:56:05
 Family Name - [redacted]
 Incoming Record - 17/04/2012 09:56:05
 Date of Birth - [redacted]

Where duplicates exist for data items Accepted these will be automatically discarded. These changes cannot be undone. Do you wish to continue? Cancel Continue

Example of when you select ‘Reject’ and select Apply

When you select the **Continue** button the values displayed under **Rejected Values** you will be prompted to enter reasons for you are rejecting the data. The discarded data will be removed from the Conflicts area; the Student’s data for these will not be updated. These values and any duplicate records will also be removed for the appropriate tab in the **Manage Data Conflicts** area.

Data Transfer

Resolved Data Conflicts - Basic Details

Rejected Values

Incoming Record - 16/04/2012 17:36:48
Chosen Given Name - [redacted]

The forename you have sent is incorrect please change to: [redacted]

Incoming Record - 16/04/2012 17:36:48
Chosen Family Name - [redacted]

The surname you have sent is incorrect please change to: [redacted]

Incoming Record - 16/04/2012 17:36:48
NCY - 7

The ncy you have sent is incorrect please change to: 8

Where duplicates exist for data items Accepted these will be automatically discarded. These changes cannot be undone. Do you wish to continue? Cancel Continue

Example of the system information when you select 'Accept' and select Apply

When you select the **Continue** button the system will notify you of any important information that you might need to be aware of to help you make an informed decision about whether you wish to accept the incoming data.

Resolved Data Conflicts - School History

Accepted Values

On continue, the current registered base in ONE will be ended automatically, the incoming School History will be added as new record for the Student.

The Start Date and End Date of the incoming School History overlaps with the Start Date and End Date of the current Registered Base. Do you wish to continue?

Base Name - A [redacted] School
Start Date - 19/12/2010
End Date -
Reason for Leaving -
Reg - Yes Dual - No Guest - No
Registration Type - Main reg base, no dual

Where duplicates exist for data items Accepted these will be automatically discarded. These changes cannot be undone. Do you wish to continue? Cancel Continue

When you have processed all the Conflicts in the highlighted tabs in the **Manage Data Conflicts** screen the system will automatically take you back to the Matched with Conflicts area and the Students will be removed from the list that you were searching for.

Unmatched | **Matched with Conflicts** | Manage Incoming Students

Data Conflict Filters Names(2) Address(2) SEN(2) Leavers(0) Exclusions(1)
 Looked After(2)

Filters

[Clear Filters](#)

7 Students [Wide View](#) [Export](#)

Name	UPN	Base Name	NCY	Reg. Grp	File ID	File Creation Date/Time	File Im Date/Ti
S	[redacted]	[redacted]			[redacted]	17/04/2012 09:56:05	17/04/2012 09:56:22
M	[redacted]	[redacted]			[redacted]	16/04/2012 17:36:48	16/04/2012 17:37:05
S	[redacted]	[redacted]	7		[redacted]	16/04/2012 15:02:34	16/04/2012 15:03:06
M	[redacted]	[redacted]			[redacted]	16/04/2012 15:02:34	16/04/2012 15:03:06
J	[redacted]	[redacted]			[redacted]	16/04/2012 15:02:34	16/04/2012 15:03:06
M	[redacted]	[redacted]			[redacted]	16/04/2012 15:02:34	16/04/2012 15:03:06
J	[redacted]	[redacted]	7		[redacted]	16/04/2012 15:02:34	16/04/2012 15:03:06
M	[redacted]	[redacted]			[redacted]	16/04/2012 15:02:34	16/04/2012 15:03:06

Additional Notes Regarding the Manage Data Conflicts screen

Scenarios where incoming Data will be placed in the Manage Data Conflicts area if you have set the Data Processing Rules as 'Always Import' or 'Import if Null, else put in Conflict' for the Data Item.

- Where the incoming data is a lookup code is an External Code and this is mapped to more than one Internal Code in One then the system will place the incoming data into the **Manage Data Conflicts** area for the relevant tab. If you wish to process this from the Conflicts area then you will be prompted to select a valid code from a list of codes held in One for that particular Data Item.
- Where the incoming data is a lookup code and this exists but is 'inactive' in One then the system will place the incoming data into the **Manage Data Conflicts** area for the relevant tab. If you wish to process this from the Conflicts area then you will be prompted to select a valid code from a list of codes held in One for that particular Data Item.
- Where the incoming data is invalid, this is where it does not exist at all in One then the system will auto reject the incoming data and an error will be logged in the Error Log with details of why this data was rejected. The **Rejections Report** will capture any such auto rejections.
- Where the incoming Address for a Student and a Carer does not exist in One (for both where the incoming Dwelling or Street does not exist in One) this will always be placed in Conflict. If you wish to Accept the incoming Address then you will be required to process this manually by adding this Address to your system and then accepting this for the Student or Carer which will then create an appropriate link for the Address.

NOTE: It advised that you try and search for a match for the incoming Address before you add this to your system to prevent duplicate Addresses being added.

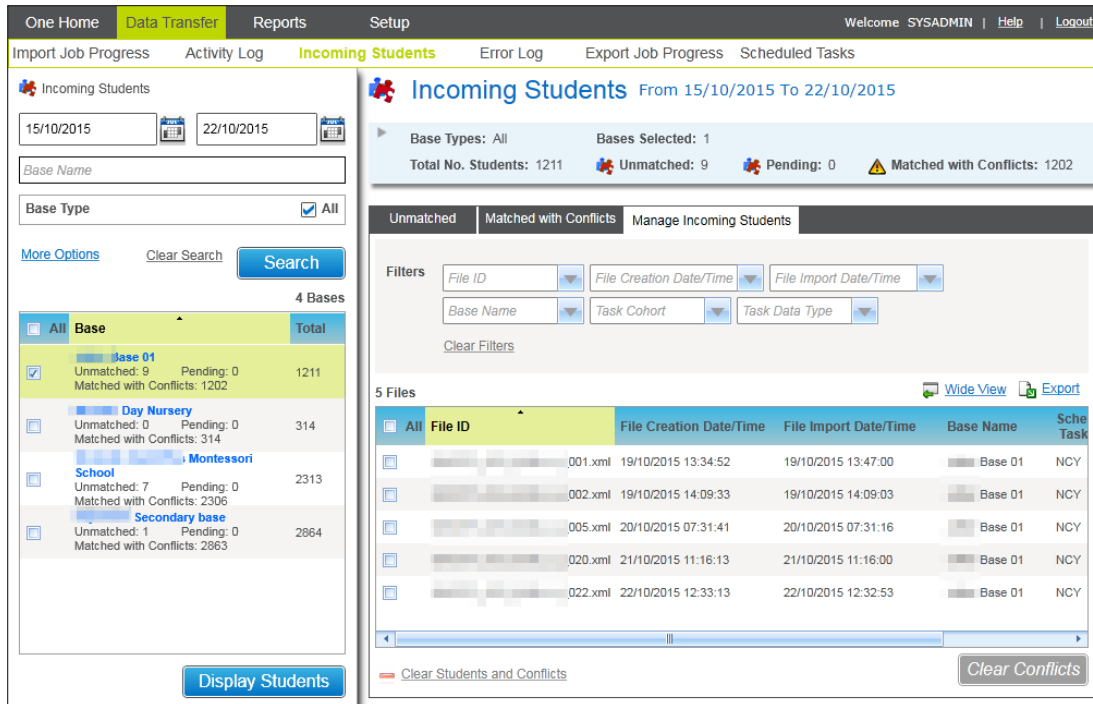
- Where the incoming Carer is Unmatched then this will be displayed in the **Unmatched** area within the **Carers** tab.

NOTE: It advised that you try and search for a match against the people match for the incoming Carer before you add this to your system to prevent duplicate people being added.

Manage Incoming Students

Data Transfer | Incoming Students | Manage Incoming Students

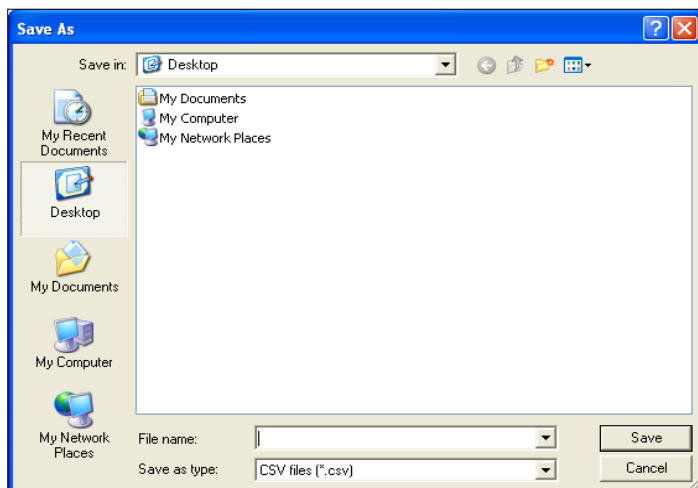
When Student information is received in the various files record is received from the School and these files contain data for Students that are Unmatched or Matched with Conflicts then details of these files will be placed in the **Manage Incoming Students** area.



Clicking the **Wide View** hyperlink will allow you to see the list of the files that have been retrieved for the Base that you have selected.

NOTE: You will be able to select more than one Base at the same time.

Clicking **Export** hyperlink will display the following dialogue on your machine.



You must define the filename and the type of file you wish to save as (this can be *.csv, *.xls or *.htm) and select where you wish to the file to be saved and then click **Save**.

The details in the grid will be saved in you preferred format including any details that cannot be viewed on the screen because it requires scrolling through e.g.

	A	B	C	D	E	F	G
1	File ID	File Creation Date/Time	File Import Date/Time	Base Name			
2	8	16/04/2012 17:36:48	16/04/2012 17:37:05	school			
3	8	17/04/2012 09:56:05	17/04/2012 09:56:22	school			
4	8	17/04/2012 11:47:22	17/04/2012 11:47:48	school			
5							

NOTE: Once the results in the grid are saved in your preferred format then you will be able to modify or edit this as you wish.

You can filter for the Students records that have been retrieved based on the search criteria that you have defined.

You will be able to filter the files you are looking for on the following:

Filters: These allow you to filter the list of Files by the columns contained in the Data Grid (**File ID, File Creation Date/Time, File Import Date/Time and/or Base Name**)

Selecting the **Clear Filters** link will remove all the filters you have defined.

The Clear Students and Conflicts and Clear Conflicts options will be disabled until you select one or more records in the retrieved list.

	File ID	File Creation Date/Time	File Import Date/Time	Base Name
<input type="checkbox"/>	1	04/01/2012 13:32:36	13/04/2012 15:18:15	Primary
<input type="checkbox"/>	1	03/11/2010 15:16:39	13/04/2012 15:28:31	Primary
<input checked="" type="checkbox"/>	8	12/04/2012 10:33:51	12/04/2012 18:01:13	Primary
<input checked="" type="checkbox"/>	8	13/04/2012 13:11:44	13/04/2012 13:21:03	Primary
<input checked="" type="checkbox"/>	8	13/04/2012 13:11:44	13/04/2012 14:03:02	Primary

Click the **Clear Students and Conflicts** link if you want to clear any Student records from both the **Unmatched** and **Matched with Conflicts** tabs. The system will display a message to inform you of the number of Students that exist in the **Unmatched** and **Matched with Conflicts** tabs for the selected files which will be discarded.

Select **No** to cancel the action and **Yes** if you are happy for the Students for the selected files to be discarded.

Data Transfer

Click the **Clear Conflicts** button if you want to clear any Student records from only the **Matched with Conflicts** tab. The system will display a message to inform you of the number of Students that exist in the **Matched with Conflicts** tabs for the selected files which will be discarded.

Capita One - Clear Conflicts

There are 2 students with Conflicts which have not been resolved and will be cleared down from the Conflict Management area.

Do you wish to continue?

No

Select **No** to cancel the action and **Yes** if you are happy for the Students for the selected files to be discarded.

NOTE: Clicking the **Clear Conflicts** button will only discard Students in the selected files from the **Matched with Conflicts** area and not the **Unmatched** area.

If you want the system to discard the Students for the selected from both the **Unmatched** and **Matched with Conflicts** areas then you must select the **Clear Students and Conflicts** link.

Deleted by School

Data Transfer | Incoming Students | Deleted by School

For students who have been deleted in SIMS and have an existing student record in One, their records are displayed in the **Deleted by School** tab so that you can review the records.

The screenshot shows the 'Incoming Students' interface with the 'Deleted by School' tab selected. The interface includes a navigation menu, search filters, and a table of student records.

Navigation Menu: One Home | Data Transfer | Reports | Setup

Sub-Menu: Import Job Progress | Activity Log | Incoming Students | Error Log | Export Job Progress | Scheduled Tasks

Filters: 01/06/2016 to 08/06/2016

Base Name: [Text Input]

Base Type: [Dropdown Menu] All

Search: [Search Button]

Summary: 4 Bases

All	Base	Total
<input type="checkbox"/>	anischool-1 Unmatched: 4 Pending: 0 Matched with Conflicts: 0	4
<input checked="" type="checkbox"/>	anischool-7 Unmatched: 1 Pending: 0 Matched with Conflicts: 0	1
<input type="checkbox"/>	mithra Unmatched: 93 Pending: 0 Matched with Conflicts: 0	93
<input type="checkbox"/>	Niranjana Base Unmatched: 45 Pending: 0 Matched with Conflicts: 3	48

Deleted by School Tab Summary: Base Types: All | Bases Selected: 1 | Total No. Students: 1 | Unmatched: 1 | Pending: 0 | Matched with Conflicts: 0 | Deleted by School: 1

Filters: Surname or Forename | Base Name | File ID

1 Files:

All	Name	UPN	Post Code	File ID	Deleted Date/Time	Base Name
<input type="checkbox"/>	sravani, Raaa F	N82051561502A		8205157_CES_820LLLL_074.xml	08/06/2016 10:56:00	anischool-7

Buttons: Display Students | Clear Students

One does not alter records for students listed in this tab. The details are presented so that you can choose how to handle the One student record in accordance with your local authority's retention policies, e.g. make the student inactive or archive the student record.

There is now a bulk delete option available in SIMS so it is possible that occasionally you may see larger volumes of data than expected.

If you select a student record and click the **Clear Students** button the student's details are removed from the list and will not be displayed in future imports.

Error Log

Data Transfer | Error Log

The Error Log will allow you to review any Errors generated by B2B:Student based upon Search criteria that you enter.

The screenshot shows the 'Error Log' page for 'A School Primary School'. The search panel on the left includes date filters (10/04/2012 to 17/04/2012), a 'Base Type' dropdown set to 'All', and a 'Search' button. The main area displays school details and a table of 4 errors. The table columns are Name, File ID, Error Type, File Creation Date/Time, and Date Logged. The errors listed are Oracle and Data errors for files ending in .xml.

All	Name	File ID	Error Type	File Creation Date/Time	Date Logged
<input type="checkbox"/>		8.xml	Oracle	17/04/2012 09:56:22	17/04/2012 10:04:09
<input type="checkbox"/>		8.xml	Data	17/04/2012 09:56:22	17/04/2012 09:59:42
<input type="checkbox"/>		6.xml	Data	16/04/2012 17:37:05	17/04/2012 09:28:35
<input type="checkbox"/>		6.xml			

The Error Log will allow you to make a clearer distinction between Errors (e.g. issues with the incoming data) and Conflicts (e.g. differences between incoming data and existing One data)

The Error Log can be accessed either through the menu route described above or directly from the various parts of the Activity Log. See the **Activity Log** section above for further details.

The Search panel on the left allows you to enter and amend your search criteria by specifying a From Date and To Date.

You will also be to further refine your search by entering partial information in the **Base Name** search field.

This is a close-up of the search panel in the Error Log interface. It features date filters (06/04/2012 to 13/04/2012), a 'Base Name' search field, and a 'Base Type' dropdown set to 'All'. There are 'More Options', 'Clear Search', and 'Search' buttons.

Clicking the **Clear Search** link will remove any selections or values you have entered.

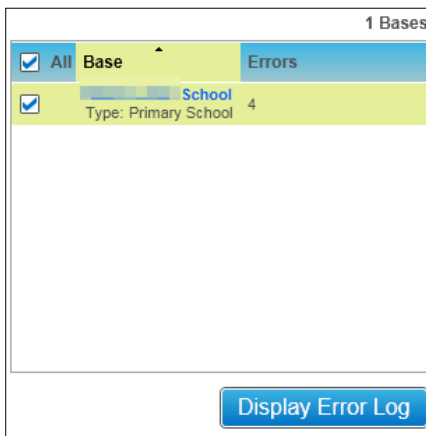
By default the **Base Type** search criteria is set to 'All'. However you will be able to filter this by clicking on the **More Options** link. This will enable you to select one or more **Base Types** as required by 'ticking' the relevant checkboxes in the **More Search Options** modal window.

Click the **Close** link or button to close the **More Search Options** dialog.

Clicking the **Clear Search** link will remove any selections made in the **More Search Options** area.

Data Transfer

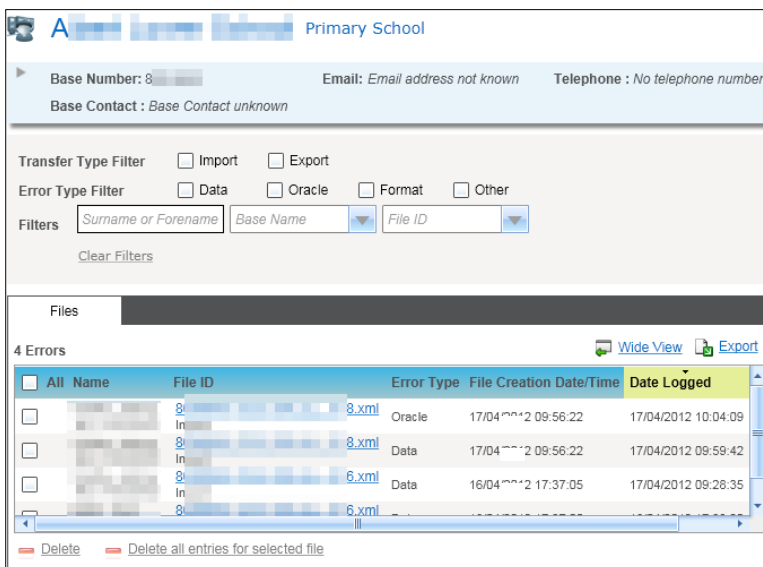
When the **Search** button is clicked the system will display the list of Bases that meet the criteria that has been defined; this will include a count of the number of Bases that have been retrieved.



In order to view the Error Log for one or more Bases you must select the Base or Bases by selecting the checkbox next to each Base record. This will enable the **Display Error Log** button.

Clicking on this button will display the list of Error Log entries for the Base or Bases selected and meeting the search Criteria entered.

If you select one Base from the Search Results Panel, the system will display information about that Base in the header panel at the top right hand corner of the screen as shown by the typical example below:



The system will display the **Base Name** and **Base Type** together with the following additional information about the Base:

- **Base No** - LA Number and School Number
- **Email Address** – as recorded against the Principal Site of the Base in One
- **Telephone** - as recorded against the Principal Site of the Base in One
- **Base Contact** - the Person who is listed as a School Contact with the Role Code of 'Head' against the Base.

If you select more than one Base from the Search Results Panel, the system will indicate that multiple Bases have been selected in the header panel at the top right hand corner of the screen as shown by the typical example below:

Multiple Bases Selected

Base Type: All [View](#) Base Selected: 2 [View](#)

Transfer Type Filter Import Export

Error Type Filter Data Oracle Format Other

Filters

[Clear Filters](#)

Files

13 Errors [Wide View](#) [Export](#)

<input type="checkbox"/> All	Base Name	Name	File ID	Error Type	File Creation Date/Time
<input type="checkbox"/>	Pr...	...	8...	Data	17/04/2012 13: 38
<input type="checkbox"/>	Pr...	...	8...	Data	17/04/2012 13: 38
<input type="checkbox"/>	Pr...	...	8...	Data	12/04/2012 18: 13
<input type="checkbox"/>	Al...	...	8...	Oracle	17/04/2012 09: 22

[Delete](#) [Delete all entries for selected file](#)

Note additionally that in this instance the Base Name has been added as an additional column in the list of Errors returned.

The system will display a count of the Base Types that have been selected in the Search Criteria. If all Base Types have been selected, then this will be displayed as 'ALL'. A hyperlink is available to for you to display the Base Types selected.

B2B Error Log Selected Base Types

Base Type

- Misc cross phase est
- Primary School
- Sec with 6th form
- Sec without 6th form

[Close](#)

The system will also display a count of the Bases selected from the search results panel. A hyperlink is available to show more details of these Bases.

B2B Error Log Selected Bases

Base Name	Email	Telephone	Base Contact
P...			
A...			

[Close](#)

Data Transfer

In all instances, the system will list the Errors logged for the Base(s) selected from the Search Results panel. The fields displayed are as follows:

- **Base name** – is only displayed when more than one Base is selected
- **Student Name, DOB and Gender** – Incoming Student for which the Error has been logged
- **File Id and Transfer Type** - file for which the Error has been logged
- **Error Type** - Data, Oracle, Format, Other
- **File Creation Date/Time**
- **Date Error Logged**
- **Error Id**

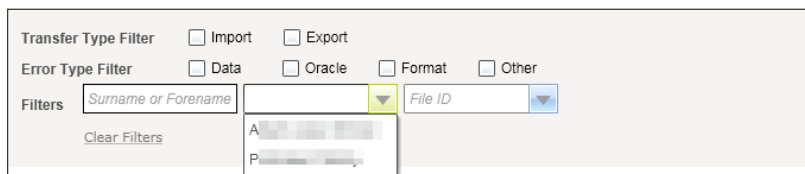
An entry will be created will be created for each Error occurring and therefore there may be more than one entry relating to a File ID.

You will be able to filter the list of Errors returned by the following:

- **Transfer Type**
- **Error Type**

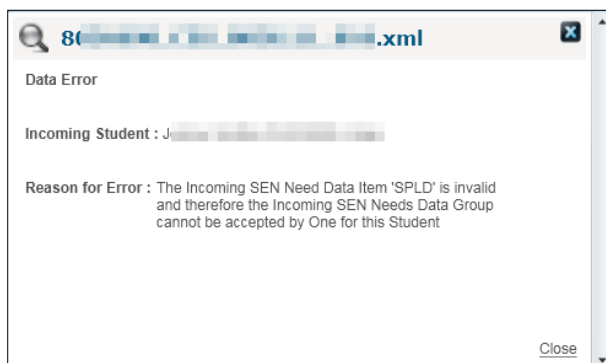
You will also be to filter the list of Errors by the following data returned for the selected Base(s):

- **Surname or Forename**
- **Base Name**
- **File ID**



Transfer Type Filter Import Export
Error Type Filter Data Oracle Format Other
Filters
Clear Filters

A hyperlink is provided for each entry listed on the Error Log against the File ID; clicking on this hyperlink will take you to a modal window which will display more details about the Error.



8c...xml

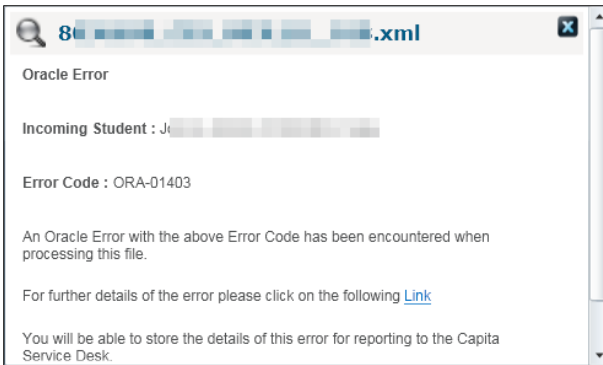
Data Error

Incoming Student : J...

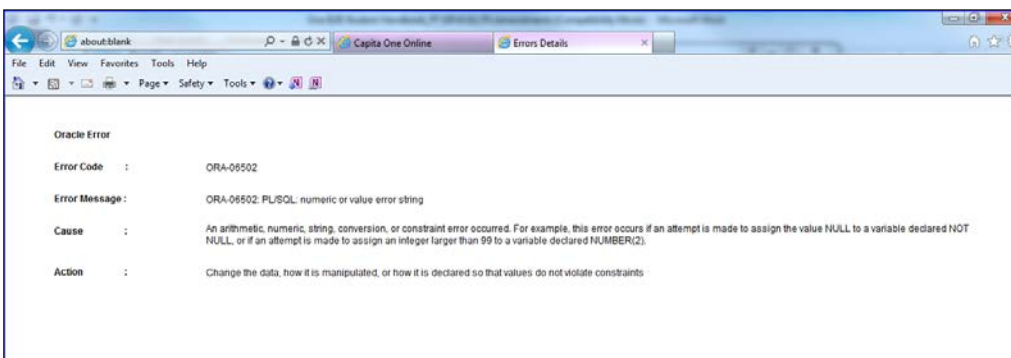
Reason for Error : The Incoming SEN Need Data Item 'SPLD' is invalid and therefore the Incoming SEN Needs Data Group cannot be accepted by One for this Student

Close

For an Oracle Error, clicking on the hyperlink will take you to a standard Oracle Error modal window.

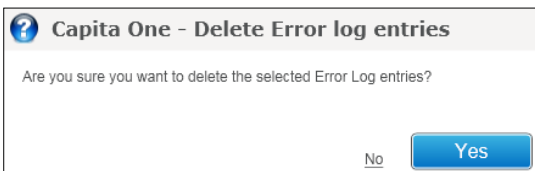


It is strongly recommended that any Oracle Errors are reported immediately to the Capita One Service Desk. In order to assist any investigation required, a hyperlink will enable you to open a web page containing further details of the Oracle Error which can be saved and attached to the call.

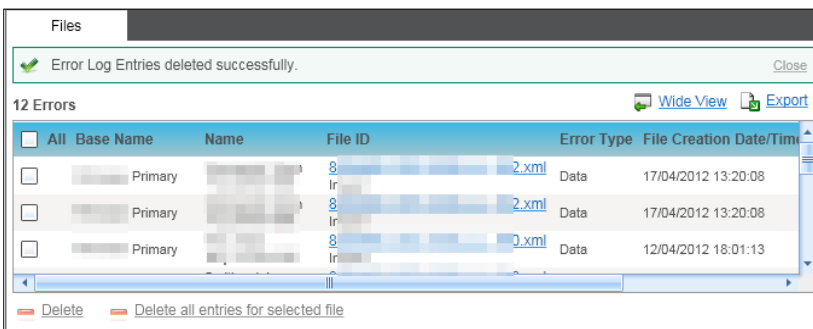


You will be able to delete entries from the Error Log in two ways.

You can select one, more or all entries on the Error Log which will enable the **Delete** hyperlink. Upon clicking this button, you will be asked to confirm whether or not you wish to continue and if you do, then the system will delete the selected Error Log entries and display the following message:



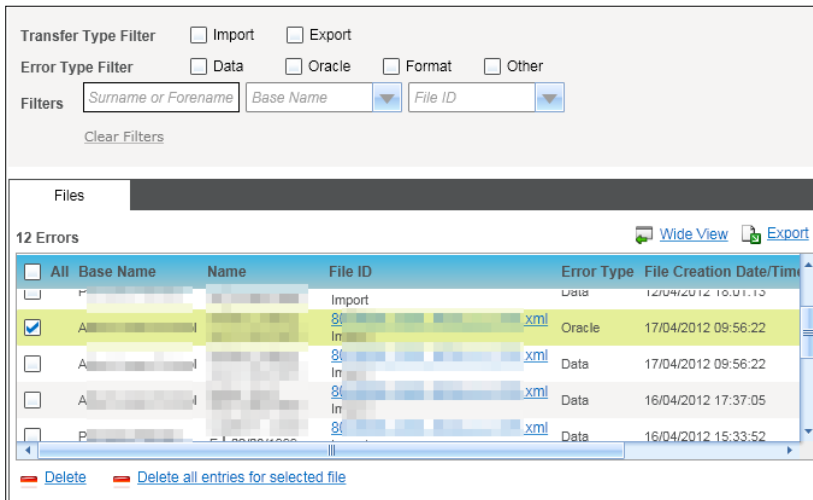
Clicking Yes will display the message notifying you that the Error Log entries you have selected have been deleted successfully.



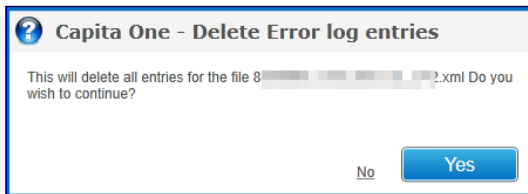
Alternatively you can select one entry on the Error log and ask the system to delete ALL the entries for that File ID that have logged at the same Date and Time. This will enable you to quickly remove the entries for a specific file logged at this Date and Time once you are happy that they have been resolved.

Data Transfer

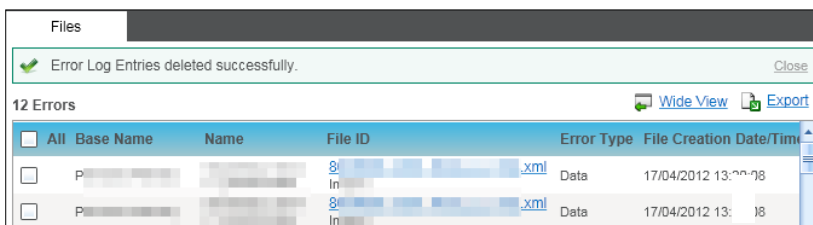
Selecting one entry on the Error Log will enable the **Delete all entries for selected file** hyperlink.



Upon clicking of this button, the system will ask you whether you wish to continue with the deletion:

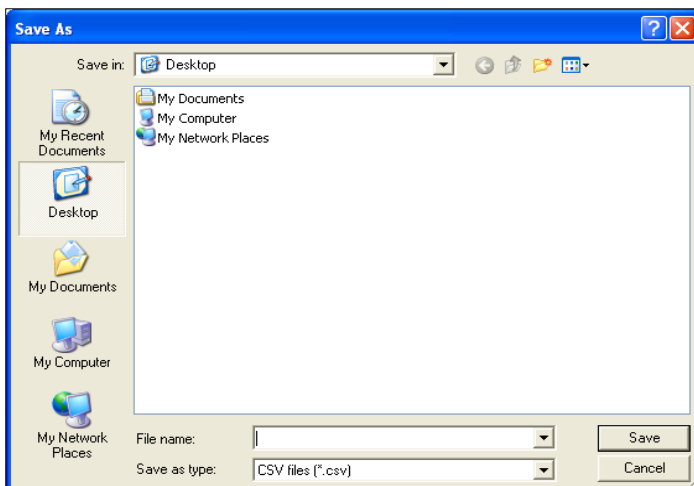


If you do, the system will remove all Error Log entries for the File ID shown and display the following message:



Clicking **Wide View** hyperlink will allow you to see the list of Error Log entries retrieved in a wide view.

Clicking the **Export** button will display the following dialogue on your machine.



You must define the filename and the type of file you wish to save as (this can be *.csv, *.xls or *.htm) and select where you wish to the file to be saved and then click **Save**.

NOTE: The details in the grid will be saved in your preferred format including any details that cannot be viewed on the screen without scrolling across.

The screenshot shows a Microsoft Excel spreadsheet titled 'Error Log.xml'. The spreadsheet contains a table with the following data:

	A	B	C	D	E	F	G	H
	Base Name	Surname	Forename	DOB	Gender	File ID	Error Type	File Creation Date/Time
2	P		A		Male	80...xml	Oracle	13/04/2012 14:43:39
3	P		Tr		Female	80...xml	Oracle	16/04/2012 13:30:15
4	P		Se		Female	80...xml	Data	17/04/2012 13:20:08
5	P		Si		Female	80...xml	Data	17/04/2012 13:20:08
6	A		Jc		Male	80...xml	Data	17/04/2012 09:56:22
7	A		Jc		Male	80...xml	Oracle	17/04/2012 09:56:22

06 / Reports

All Reports

Reports | All Reports

This screen will allow you to see the two Reports that exist for B2B:Student which are the: B2b_ExceptionsReport and the B2b_RejectionsReport. You can search for the Report you are looking by entering the title of the Report in the **Report Title** field or search for a Report by clicking the browse button which will display a pop up search window which will allow to search for and select the Report you are looking for.



Reports

Report Title

B2B Student Reports

Clear Search Search

+ Add new report

Once you have entered the values for the Reports(s) you are looking for then click the **Search** button to retrieve the Report(s) that you are looking for.

The system will display the list of Reports that have been retrieved based on your search criteria including the total number of reports.

3 report(s) returned for 'B2B Student Reports' process

Report Title	Last Uploaded
acceptance_letter	27/03/2012 15:58
B2b_ExceptionsReport	12/04/2012 12:10
B2b_RejectionsReport	12/04/2012 12:10

The **Clear Search** link will clear any values you have entered.

It is possible for you add or upload your own B2B:Student Reports by selecting the **Add new report** or the **Upload new report** links.

Reports

Report Title

B2B Student Reports

Clear Search Search

+ Add new report

3 report(s) returned for 'B2B Student Reports' process

Report Title

B2B Student Reports

Last Uploaded: -

File Name Upload new repor Report ID: -

Cancel Save

If you click the **Save** button without defining the mandatory information the system will display the following error message prompting you to define the information before you can upload a Report.

Please correct the following errors:

Please upload a Crystal reports (.rpt) file before saving
Report Title is required for save

Report Title

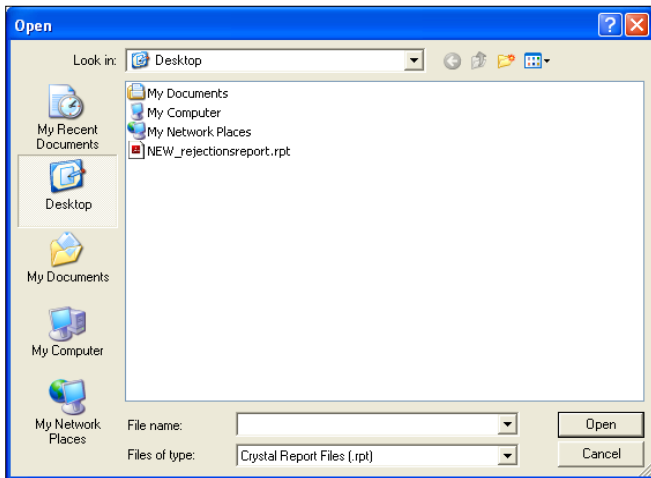
B2B Student Reports

Last Uploaded: -

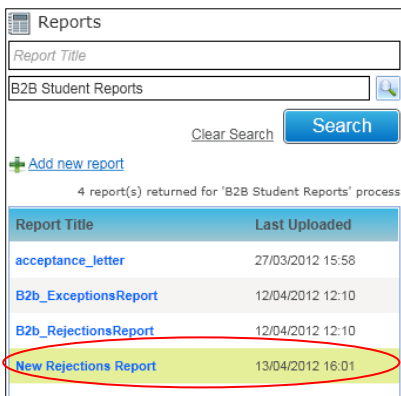
File Name Upload new repor Report ID: -

Cancel Save

The system will display the following dialogue on your machine; select the .rpt Report that you wish to upload.

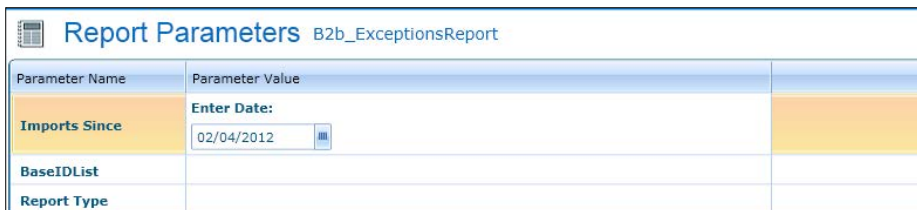


Once you have selected the required Report click the **Save** button; when the Report has been successfully uploaded it will appear in the list.



Exceptions Report

Select the B2b_ExceptionsReport and click the **Run Report** button; the system will display the **Report Parameters** pop up window which will allow you to define the parameters for the Exceptions Report. Select the date that you want the Report to include data from in the **Imports Since** field.



Select the Base(s) that you want the Exceptions Report to include in but selecting a value in the **BaseIDList** field. This will display the **Base Search** pop up window which will allow to search for Bases that you wish to be included in the Exceptions Report; 'tick' the B2B Student Base field to search for the v4 B2B:Student Bases. Select one or more Bases that you wish to be included in the Exceptions Report.

Reports

Once you have selected the Bases you wish to be included the click the **Select** button. Next select one of the following for the **Report Type** field:

- **Unmatched Student Data** – this will display the values for the Unmatched Student’s NCY, SEN, Ethnicity and In Care (if these have been selected in the **Exceptions** tab of the **Report Defaults** area) for all the Unmatched Students that have not been processed and are still displayed in the **Unmatched** tab in the **Incoming Students** area at the time of running the Report.
- **Matched Student Conflicts** – this will display the incoming values and the currently held values for the Student’s NCY, SEN, Ethnicity and In Care (if these have been selected in the **Exceptions** tab of the **Report Defaults** area); including details of whether this Student in One is Active, exists in A&T, exists in G&B, exists in CIE, exists in Transport, exists in SEN and whether this Student is a Leaver. This will include all the Matched Students that have not been processed and are still displayed in the **Matched with Conflicts** tab in the **Incoming Students** area at the time of running the Report.
- **Matched Student Address Conflicts** - this will display the incoming values and the currently held values for the Student’s Address for all the Matched Students that have not been processed and are still displayed in the **Matched with Conflicts** tab in the **Incoming Students** area at the time of running the Report.

If you select the **Cancel** link then the following message will be displayed:

If you select the **Submit Report** button then the following message will be displayed:

✔ Your report has been submitted and may be found in [your submitted reports](#)

[Description](#) [Edit](#)

You will be able to access the Report you have generated based on the parameters that you have selected in the **Submitted Reports** area which will launch the following:

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CAPITA | one Exceptions Report

LA: [redacted] Report Generated: [redacted]

Imports Since: 17/04/2012

Base(s): A [redacted] School

A [redacted] School - 1 Student(s)

UPN: [redacted] Name: S [redacted] Gender: M DOB: [redacted]

Active	Active Record in One						Import Date	Conflicts: School Value / Or		
	A&T	CIE	G&B	SEN	Transport	Leaver		NCY	SEN	Ethnicity
✔							17/04/2012 09:56	-	A/P	-

If you wish to redefine the data that you want the Exception Report to capture which is different to the type of data that you have already defined then select the **View/Edit Report Defaults** link. The system will display the **Report Defaults** area where you can access the **Exceptions Report** tab which will allow you to select the type of data you want to be included in the Exceptions Report.

Rejections Report | Exceptions Report

Unmatched Students

- All Incoming Data
- Leavers
- NCY
- SEN
- Ethnicity
- Looked After

Matched Students

- All Conflicts
- Leavers
- Active Admissions and Transfers Student
- Active Child in Employment Student
- Active SEN Student
- Active Grants and Benefits Student
- Active Transport Student
- NCY
- SEN
- Ethnicity
- Looked After

Rejections Report

Select the B2b_RejectionsReport and click the **Run Report** button; the system will display the **Report Parameters** pop up window which will allow you to define the parameters for the Exceptions Report. Select a **From** and **To** date that you want the Report to include data from in the **Date** field.

Reports

Report Parameters B2b_RejectionsReport	
Parameter Name	Parameter Value
Date	Enter Date: From 13/04/2012 To 13/04/2012
BaseIDList	
RejectionSource	
RejectionType	

Select the Base(s) that you want the Rejections Report to include in by selecting a value in the **BaseIDList** field. This will display the **Base Search** pop up window which will allow to search for Bases that you wish to be included in the Rejections Report; 'tick' the B2B Student Base field to search for the v4 B2B:Student Bases. Select one or more Bases that you wish to be included in the Exceptions Report.

Base Search						
<input type="text" value="a"/>	<input type="text" value="School Number"/>	<input type="text" value="Base Types"/>				
<input type="text" value="LA Bases"/>	<input type="text" value="Not Applicable"/>					
<input type="text" value="LRN"/>	<input type="checkbox"/> B2B Student Base	<input checked="" type="radio"/> Show Active <input type="radio"/> Show Inactive <input type="radio"/> Show All				
		<input type="button" value="Clear Search"/>	<input type="button" value="Search"/>			
1 Bases						
<input checked="" type="checkbox"/>	All Name	Base Type	LA	School No.	Control	Active
<input checked="" type="checkbox"/>	School	Primary School	W	6	Community	Yes
		<input type="button" value="Close"/>	<input type="button" value="Select"/>			

Once you have selected the Bases you wish to be included the click the **Select** button. Next select one of the following for the **Rejection Source** field:

- **All** – this will include both the Auto Rejection and Conflicts Rejections (for the data items have been selected in the **Rejections** tab of the **Report Defaults** area)
- **Auto Rejection** - this will include the Auto Rejections (for the data items have been selected in the **Rejections** tab of the **Report Defaults** area); the reason field will be prefixed with an 'A' in the Rejections Report
- **Conflict Rejection** - this will include the Conflict Rejections (for the data items have been selected in the **Rejections** tab of the **Report Defaults** area) ; the reason field will be prefixed with a 'C' in the Rejections Report

Report Parameters B2b_RejectionsReport	
Parameter Name	Parameter Value
Date	From 13/04/2012 To 13/04/2012
BaseIDList	
RejectionSource	Enter Rejection Source: <input type="text"/>
RejectionType	<input type="text"/> <ul style="list-style-type: none"> All Auto Rejection Conflict Rejection

Select the information for the **Rejection Type**.

If you select the **Cancel** link you; the following message will be displayed.

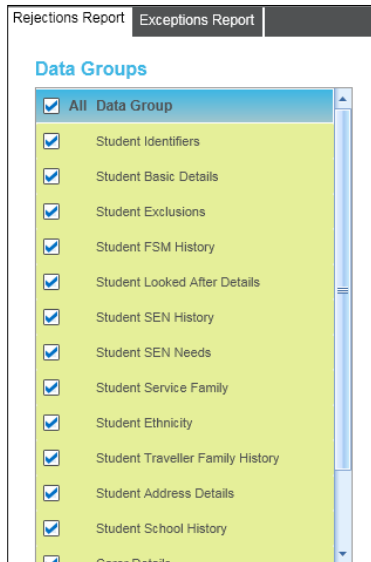
If you select the **Submit Report** button then the following message will be displayed.

You will be able to access the Report you have generated based on the parameters that you have selected in the **Submitted Reports** area which will launch the following screen:

Rejection Date:	Type:	Item:	Incoming Value:	ONE Value:	Rejection Reason:
17/04/2012 10:17	R	CHOSEN GIVEN NAME CHOSEN FAMILY NAME NCY (INCL OFFSET)	7		C The forename you have sent is incorrec change to: J
17/04/2012 9:59	R	NEED RANK	SPLD 2		A The Incoming SEN Need Data Item 'SP
17/04/2012 9:28	R	NEED RANK	SPLD 2		A The Incoming SEN Need Data Item 'SP

Reports

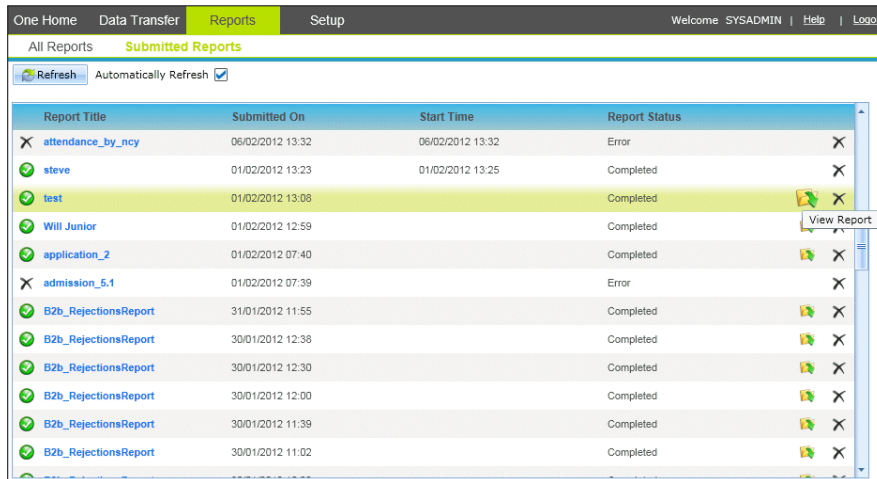
If you wish to redefine the data that you want the Exception Report to capture which is different to the type of data that you have already defined then select the **View/Edit Report Defaults** link. The system will display the **Report Defaults** area where you can access the **Exceptions Report** tab which will allow you to select the type of data you want to be included in the Exceptions Report.



Submitted Reports

Reports | Submitted Reports

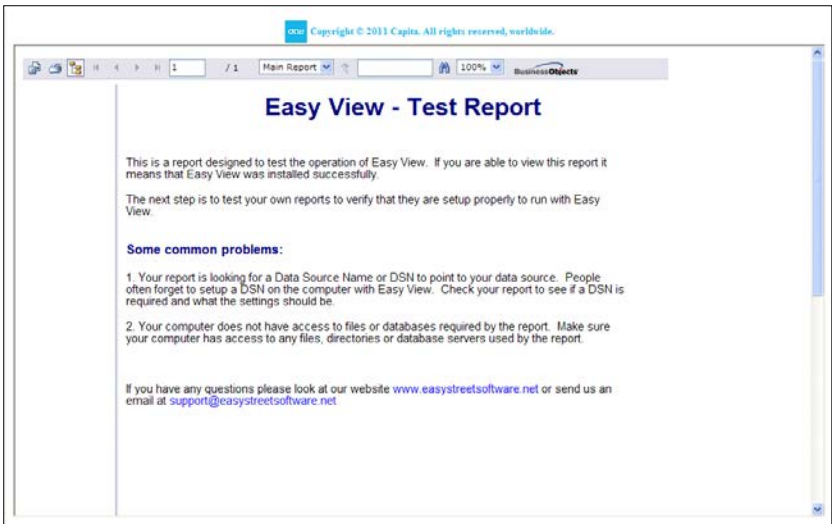
This area will allow you to view any Exceptions and Rejections that you have run.



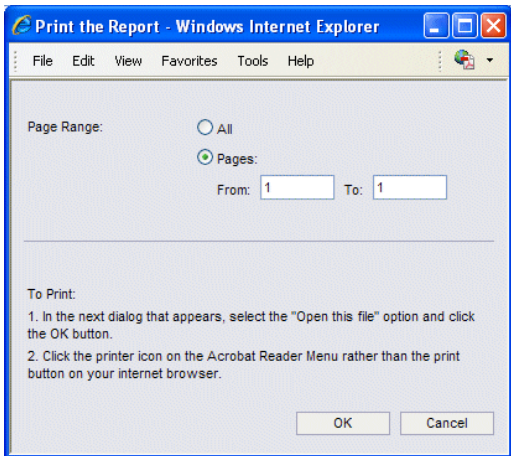
Clicking the **Refresh** button refreshes the list of submitted reports.

Selecting the **Automatically Refresh** check box will continuously update the list of submitted reports.

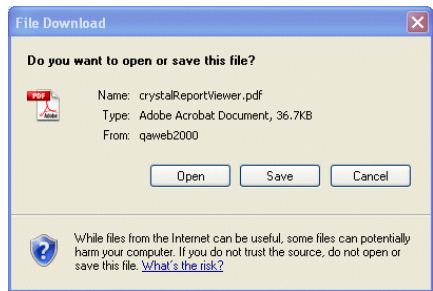
Clicking the **View Report** icon will open an editable version of the submitted report.



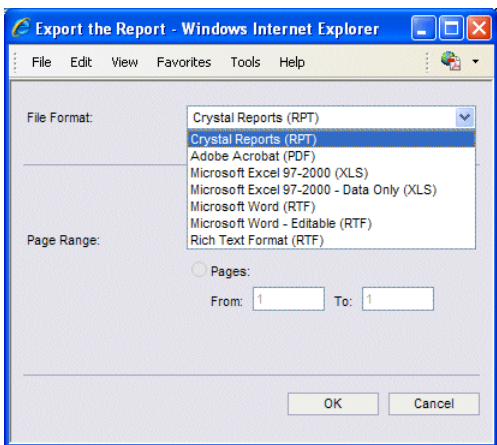
To Print the report: Click the **Print** button, specify the Page Range and click **OK**.



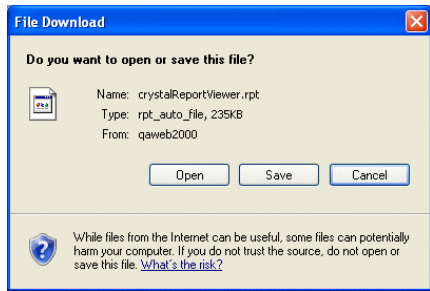
The File Download output is in PDF format and can be opened and printed, or saved.



To Export the Report: Click the **Export** button; this opens the **Export the Report** dialog allowing you to select the file format for the report file output.



Clicking **OK** opens the **File Download** dialog giving you the options to **Open** the file in the selected format or **Save** to a location of your choice.



Reports

Clicking the **Show/Hide Group Tree** button removes the side panel, making the report panel full screen. Clicking again will replace the Group Tree.



To Delete a Report: Click the **Delete Report** icon shown on the right side of the page. A message will be displayed to confirm the deletion.



NOTE: The Delete Report symbol is also used to identify submitted reports with Report Status as Error.

07 / Appendix

v3 and v4 Tables

v4 Table name	v3 Table that was replaced	Comments
B2B_BASE_DATA_PROCESS		Data processing rules for each base
B2B_DATA_PROCESS	DX_XML_FIELD_PROCESS	Default data processing rules
B2B_ALERTS_DATA		Changed data required for alerts
CCS_DATA_CONFLICT_DETAIL	DX_XML_DETAIL	Conflict data items, one record per tag
CCS_DATA_CONFLICT_FILE	DX_XML_SOURCE	Files imported, one record per file
CCS_DATA_CONFLICT_LOG	DX_XML_LOG	History of files imported, discarded, exported
CCS_DATA_CONFLICT_PERSON	DX_XML_STUDENT	Conflict student data, one record per student
CCS_DATA_HOLDING_DETAIL	DX_XML_DETAIL	Initial holding table for data items, one record per tag
CCS_DATA_HOLDING_PERSON	DX_XML_STUDENT	Initial holding table for student data, one record per student
CCS_DATA_REJECTION_DETAIL		Rejected data items, one record per tag
CCS_DATA_REJECTION_PERSON		Rejected student data, one record per student
CCS_ERROR_LOG		Errors encountered within B2B
CCS_IMPORT_QUEUE		Incoming files stored and prioritised for importing into holding tables
DX_XML_ATTENDANCE	DX_XML_ATTENDANCE	Attendance data
ORACLE_ERROR		Oracle Errors and their meaning
CCS_DATA_IMP_EXP_FILE_LOG		Where imported/exported files sent via WCF are stored
CCS_EXPORT_QUEUE		Where data exported from One is stored
B2B_CLEAR_CONFLICT_TRACKING		Stores information on the data that has changed so that it is the same as the data in One
B2B_EXPORT_RULES		The table that holds the export rules
B2B_BASE_EXPORT_RULES		The rules set for exporting changes/rejections for each base
B2B_EXPORT_CHANGES		Holds data that has changed which needs to be exported
B2B_EXPORT_ERRORS		Logs any errors which are related to the export

08 / Glossary

Accept	Selecting this will allow to you update the Student's record with the incoming data and overwrite the data held in One. The data that you have 'accepted' will be removed from the relevant tab(s) from the Manage Data Conflicts screen.
Accept All LA Values	Selecting this option will update the value in One with the latest incoming value for each incoming data in Conflict within that tab and discard the remaining.
Accept All Latest	Selecting this option will discard all the incoming data in Conflict within that tab and discard the remaining.
Acceptable Data	This is data in which the recipient has sufficient faith to accept without review.
Always Import	The incoming data will overwrite the data that is held in the One system; if the same value is already held in the One system it will be ignored.
Always put in Conflict	If the incoming data is different from the data held in One the incoming Data Group and data items will be placed in conflict; if the same value is already held in the One system it will be ignored.
Auto-matching	This is where the system automatically matches the data by comparing key fields.
B2B	This is a generic term to indicate the relationship between two systems. The term in Capita has been widely used to refer to the transferring of student and employee data between the schools (SIMS) and Local Authorities (One).
B2B: Student	The functionality that allows Student data (for those Students that are currently enrolled or have left in the last twelve months) to be transferred between One and SIMS .net via a Webserver.
Conflict Processing	Functionality which allows manual processing of Student data where conflicts are present.
Conflicts	This is where there are differences between incoming SIMS .net and current One data.
Data Groups	This is the Group that the Data Items belong to, i.e. Student Identifiers, Basic Details.
Data Items	These are the attributes that are included in the Data Groups. For example, the Data Group Student Identifiers has the following Data Items: Date of Birth, Family Name, Gender, Given Name and Unique Pupil Number (UPN).
Discard	Selecting this will allow you to Discard the incoming data and retain the data that you hold in One. The data that you have 'discarded' will be removed from the relevant tab(s) from the Manage Data Conflicts screen.
Don't Import	The incoming data will be ignored if this is set.

HTTP/ HTTPS	<p>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.</p> <p>A set of formal rules describing how to transmit data, especially across a network.</p>
Import if Null else put in Conflict	If the related One field is blank, the imported data item will be imported as described in section Always Import. If the One field contains different data, that item will be put into conflict; if the same value as is already held in the One system it will be ignored, see section Always put in Conflict
Manage Data Conflicts	<p>The ability to hold data temporarily for a limited time span prior to either rejecting the data or using it to update the main system. The data in conflict is removed once it has been rejected or accepted. The data held in suspense will be either:</p> <p>Data incoming is different to data in the database.</p> <p>Or the Data Processing Rules that have been set up to put this data into suspense.</p>
Manual Matching	This is where the system has not been able to automatically match the incoming Employee and you have to manually match the data through the Unmatched tab.
Matched	This is where the system has not been able to automatically make a match for incoming Employee.
Matched Carer	This is where the system has been able to establish a match between the incoming Carer and a Person held in One.
Matched Student	This is where the system has been able to establish a match between the incoming Student and a Student held in One.
One	A Capita suite of modules aimed at Local Authorities.
One Web Server	<p>The One Web server is a computer running administrative software that controls access to the One/LA network and its resources, such as databases etc. and provides resources to computers functioning as workstations on the One/LA network.</p> <p>In the World Wide Web, a program accepts requests for information framed according to the Hyper Text Transfer Protocol (HTTP). The server processes these requests and sends the requested document.</p>
Ownership	A concept specific to data transfer, in which a field/record can be owned by either the School/ LA.
Password	<p>Located on the B2B Settings screen, this item is supplied to the school by the LA and is required to be entered before the school can connect to the One web server and the student data successfully transferred to the LA.</p> <p>A unique string of characters known to the LA system, and to a school user, who must specify it to connect to the One Web Server.</p>
Reject	selecting this will allow you to Reject the incoming data and retain the data that you hold for the Student in One for the selected data (any Rejections from the Conflict will be captured by the Rejections Report if you wish to run it from the Reports All Reports area). The data that you have 'rejected' will be removed from the relevant tab(s) from the Manage Data Conflicts screen.
Rejected Comments	Mandatory information that is attached to all data that has been rejected.

Glossary

SSL	SSL (Secure Sockets Layer) has been universally accepted on the World Wide Web for authenticated and encrypted communication between clients and servers. This protocol governs the transporting and routing of data over the Internet.
Student Identifiers	Data Group which holds the Data Items, Legal Surname, Legal Forename, Date of Birth, Gender and Unique Pupil Number. With the exception of Unique Pupil Number these items are mandatory and are required for matching a Student. These Data items are transferred with each XML message.
Unmatched	This is where the system has not been able to automatically match an incoming Student.
URL	(Uniform Resource Locator) This also 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 LA and is required to be entered before the school can connect to the One web server and the student data successfully transferred to the LA.
XML	An acronym for eXtensible Markup Language. For a full definition and description see the www.w3.org website

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