



# One B2B:Student

last updated for the Summer 2019 release

Handbook

**CAPITA**

## Revision History

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# 01 | Document Change Control

Date	Release	Description
Summer 2019	3.69	<p>The format of the Student Address tab has been changed for the Matched with Conflicts screen for Incoming Students.</p> <p>See <a href="#">Address</a> on page 84</p>
		<p>DPRs for carers now split between B2B and Portals to improve flexibility.</p> <p>See <a href="#">Data Processing Rules</a> on page 32</p> <p>See <a href="#">Carers</a> on page 90</p>
		<p>Students with a future School History Start Date will not be included in the transfer file until they have started their attendance at the school.</p> <p>See <a href="#">School History</a> on page 88</p>
		<p>Imported data is cached before being sent to the Matched with Conflicts screens so that identical entries will not be displayed multiple times.</p> <p>The new hashed cache for B2B requires turning on in the CCS Enterprise Server Configuration Utility.</p> <p>See <a href="#">Configuring the integration service to enable the B2B caching</a> on page 9</p>
		<p>A scheduled task has been created in v4 client   Scheduled Tasks to routinely clear the cache in line with LA's local data retention policy.</p> <p>See <a href="#">Setting up Scheduled Tasks</a> on page 30</p> <p>See <a href="#">Setup System Defaults</a> on page 43</p>
		<p>The B2b_RejectionsReport has been improved to show rejected data more accurately and the report header has been brought up to date with the current logo.</p> <p>See <a href="#">Rejections Report</a> on page 124</p>
		<p>Document updated and improved to make it more relevant to latest releases.</p>

**Document Change Control**

Date	Release	Description
Spring 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 <a href="#">Deleted by School</a> on page 99</p>
		<p>Where previously SEN Stage End Dates &amp; 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 <a href="#">Setting up Permissions for Enabling Schools to request to Import and Export data</a> on page 10</p>

# 02 | One B2B:Student

## Overview

B2B: Student 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](http://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](http://www.onepublications.com))

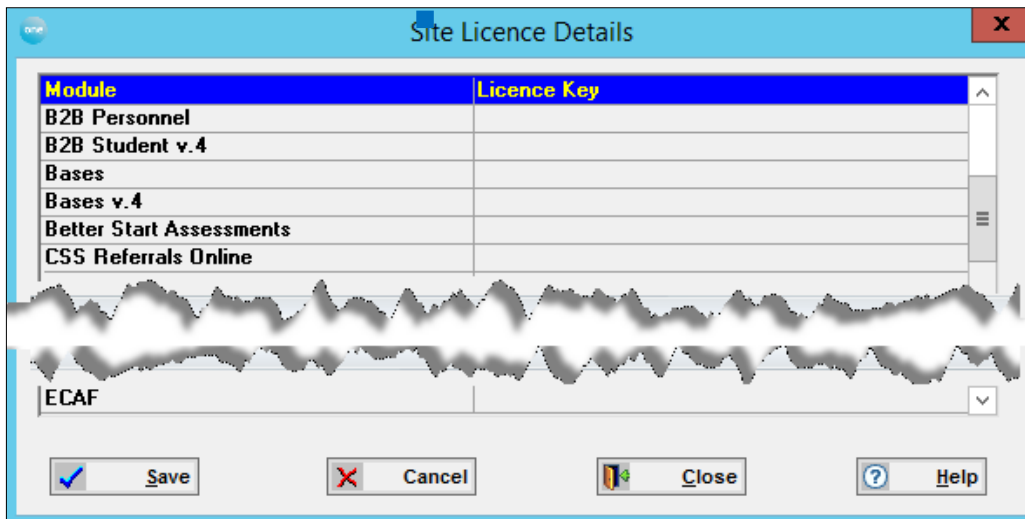
## Licences

### V3 client | Tools | Licensing

B2B:Student 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 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 or the licence key is not valid, then the B2B:Student option will not be available.





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 **v4 client | Tools | Administration | User Management** for every school that will be running B2B:Student.

**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..

#### ■ User Accounts

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

01. User Account Details

User Name: 8304321

User Description: Green Abbey School

Active:  System Admin.

E-Mail Address:

Domain User ID:

Telephone:

Password:

Mapped Person:

Mapped Base:

- Click **Save**.

#### ■ User Groups

School groups should be set up and populated with users. This would normally be the **B2BS Schools** group but where necessary a new group can be created. Users can be added or removed from the Group when required.

- Click the **New** button, enter a **User Group Name** and **User Group Description**

User Group Details [New User Group]

Save New

01. User Group Details | 02. Group Members | 01. User Group Deta

01. User Group Details

User Group Name:

User Group Description:

- In **02. Group Members** click the **Add** button which opens a **Select User(s)** pop-up. Select users as required.

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

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

**User Accounts Enquiry**

User Name

User Description

Mapped Base Name

Mapped Base Type  Active

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

■ **Batch Create Users**

The purpose of this sub-tab is to create School User IDs to give Schools access to One Online and B2B: 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 users to select individual **Schools**, **All Schools** or **Schools by Type**, then batch create User IDs for those selected.

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

**01.Base Population**

All LA Bases

Only LA Bases for Base Type

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

✔ Select	✔ Select All		
User Group Name	User Group Description	Select	
B2BS Schools	B2BS Schools	<input checked="" type="checkbox"/>	

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

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

- Click **Create User(s)**

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

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

03. User Creation Summary		
1 School(s) processed, 1 User(s) created.		
User passwords have been auto generated, for security purposes please ensure the password information has updated as soon as possible		
<b>User(s) created</b>		
Base Name	User Name	User Description
▶ Applegreen School	8204401A	Applegreen SchoolA

**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:

Log in to v4 Online and select **Administration**.

Select System Admin | System Administration.

Select the **System Defaults** tab.

Scroll down and select **B2B\_S\_AGE** parameter or search using the **Filter** option.

In the **Value** field, enter the maximum age for incoming unmatched students.

Click **Save**.

**System defaults**

Filter

Parameter code	Description	Parameter value
B2B_S_AGE	B2B:S v.4 Search Age (Max)	18
B2BDATASET	dataset to use for B2B xfr	onemast
NCY_110	B2B Personnel	13

Code

Description

Value

## 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 v4 Online and select **Administration**.
2. Select **System Admin | System Administration**.
3. Select the **System Defaults** tab.
4. Scroll down and select **Carer\_Min** parameter or search using the **Filter** option.
5. In the **Value** field, enter the maximum age at which a child can be considered a carer.
6. Click **Save**.

**System defaults**

Filter

Parameter code	Description	Parameter value
CARER_MIN	Minimum carer age for matching	18

Code

Description

Value

## 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 CCSCConfig 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 CCSCConfig utility.
2. Select the **Integration Service** tab.

Capita Children's Service Enterprise Server Configuration Utility

Application Servers | Session Servers | Report Servers | Deployment Servers | Index Server | Workflow Servers | PRIME Portal | PRIME Settings | Exclusion Portal  
 CSS Online Portal | Integration Service | Sys Admin | TransportV4 | OpenID Provider | SSO Authentication

CCS Integration Service List

CCS Integration Services: CCS Enterprise Integration Service

D:\3.59\CCSEnterprise\Windows Services\Integration Server\Integration Server\bin\Debug

Save New Suggest Defaults For Empty Items Restart Service.

**1. Oracle Connection Information**

Oracle Service Name: devb2b2  
 Oracle Username: onemx64  
 Oracle Password: .....  
 Confirm Password: .....

**2. Retention Periods**

AnT Jobs: 120 B2B Jobs: 90  
 Default Jobs: 180

**3. Other Details.**

Polling Interval (Seconds): 60 Max Threads: 5  
 Portal Update Interval (Minutes): 2 Max parallel tasks in bulk processing: 10

**4. Application Server Settings**

Application Server URL: http://localhost/CCSEnterprise\_ApplicationService\_Debug\_3.59  
 Username: sysadmin  
 Password: .....

1.0.0.0

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.

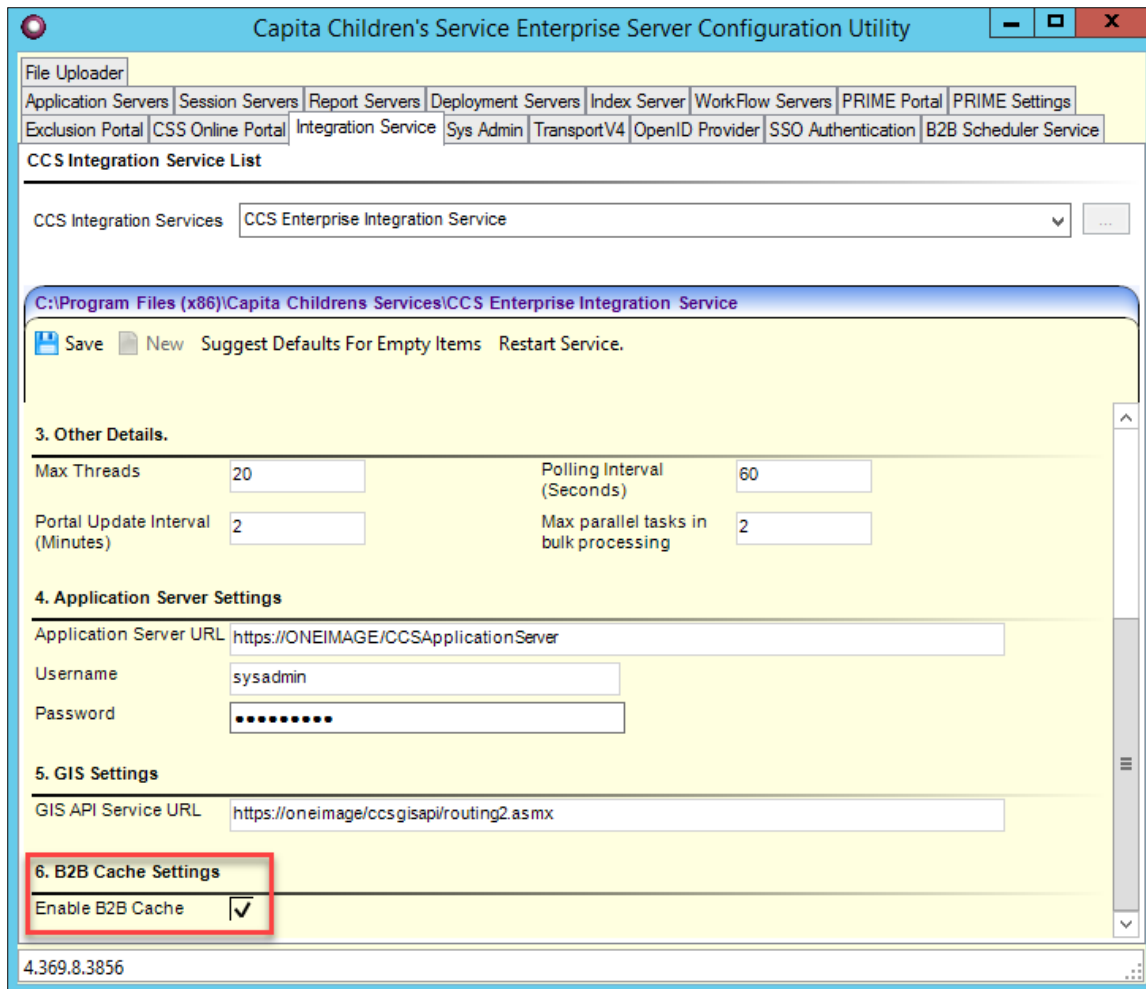
**MORE INFORMATION:**

*RG\_Permissions\_User Group Processes* available from My Account and the One Publications website ([www.onepublications.com](http://www.onepublications.com))

## Configuring the integration service to enable the B2B caching

To enable the hashed cache for B2B:Student import of data from schools, the integration service must be configured. The settings are accessed via the CCSConfig utility.

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



3. Select your integration service from the dropdown list.
4. In section 6, **B2B Cache Settings**, tick the **Enable B2B Cache** checkbox.
5. Click the **Save** button to save your changes.
6. Restart the Integration Service.

### How will I know if the new B2B Cache is working?

1. The B2B\_Student\_Cache\_Data table will begin to populate
2. Importing the same file twice will result in no new conflicts being reported for the second import of the file.

## 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**. It is recommended to use the group **B2BS Schools**, which has been created for this purpose and to give **Read-Write** permissions to the **B2BS Import/Export** and **Import/Export Data** processes.

**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**

The screenshot shows the '01. Main Processes' section with a dropdown menu set to 'B2BS Import / Export'. Below it is the '02. Business Processes' section, which contains a table with the following data:

Name	Read	Read-Write	Read-Write-Delete	Deny
B2BS Import / Exp...		✓		
Import / Export Data		✓		

**NOTES:** You should add your schools in the **B2BS Schools** group 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 your **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.

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 User Rights are assigned within **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.



## B2B: Student Setup

- **Deny** – if this permission is set then access to that particular area will be denied.

## Main Menu Tabs

There are two Main Business Processes that have been created for B2B:Student:-

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

The screenshot shows the '01. Main Processes' section with 'Main Business Processes' set to 'B2BS LAAdministration'. Below it is the '02. Business Processes' table.


Name	Read	Read-Write	Read-Write-Delete	Deny
▶ B2BS LA Administrat...		✓		
Data Processing Rules		✓		
Export Rules		✓		
Report Defaults		✓		
System Defaults		✓		

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

The screenshot shows the '01. Main Processes' section with 'Main Business Processes' set to 'B2BS LA Data Processing'. Below it is the '02. Business Processes' table.

Name	Read	Read-Write	Read-Write-Delete	Deny
✎ B2BS LA Data Processi...			✓	
Activity Log			✓	
Error Log			✓	
Export Job Progress			✓	
Import Job Progress			✓	
Incoming Students			✓	
LA Scheduled Tasks		✓		

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, 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:-

### 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:-

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

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

## B2B: Student Setup

The screenshot shows the 'Incoming Students' interface. On the left, there are search filters for dates (03/06/2019 to 10/06/2019), a 'Base Name' field, a 'Base Type' dropdown set to 'All', and a 'Search' button. Below the search area, it indicates '0 Bases' and shows a table with one row: 'All Base' with a 'Total' column. The main area on the right has a title 'Incoming Students' and summary statistics: 'Base Types: 0', 'Bases Selected: 0', 'Total No. Students: 0', 'Unmatched: 0', 'Pending: 0', 'Matched with Conflicts: 0', and 'Deleted by School: 0'. There are tabs for 'Unmatched', 'Matched with Conflicts', 'Deleted by School', and 'Manage Incoming Students'. Below these are 'Incoming Data Filter' options (Address, SEN, Leavers, Exclusions, Looked After) and a 'Filters' section with dropdowns for 'Surname or Forename', 'Base Name', 'NCY', 'Reg Group', 'File ID', 'Task Cohort', 'Task Data Type', 'DOB: (dd/mm/yyyy)', 'UPN', and 'Post Code'. At the bottom, it shows '0 Student(s)' and a table header with columns: 'All', 'Name', 'UPN', 'Base Name', 'NCY', 'Reg. Grp', 'File ID', 'File Creator', 'File Impor', and 'Scheduled'.

## 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:

The screenshot shows a permissions configuration window. The top section is '01. Main Processes' with a dropdown menu set to 'B2BS LA Data Processing'. The bottom section is '02. Business Processes' with a table of permissions:

Name	Read	Read-Write	Read-Write-Delete	Deny
B2BS LA Data Process...				
Activity Log				
Error Log				
Export Job Progress				
Import Job Progress				
Incoming Students				
LA Scheduled Tasks				

**01. Main Processes**

Main Business Processes: B2BS Conflict Management

---

**02. Business Processes**

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	✓			

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

**Incoming Students** From 03/06/2018 To 10/06/2019

Base Types: All    Bases Selected: 1    Total No. Students: 425    Unmatched: 15  
 Pending: 0    Matched with Conflicts: 410    Deleted by School: 1

Unmatched | **Matched with Conflicts** | Deleted by School | Manage Incoming Students

**Incoming Data Filter**     Address     SEN     Leavers     Exclusions     Looked After

**Filters**

Surname or Forename    Base Name    NCY    Reg Group    File ID

Task Cohort    Task Data Type    DOB: (dd/mm/yyyy)

UPN    Post Code

[Clear Filters](#)

15 Student(s)    [Wide View](#)    [Export](#)

Name	UPN	Base Name	NCY	Reg. Grp	File ID	File Creator	File Date/Time
Emory, M	12/02/2003	Green Abbey School	11	11D	8204321_CES_820LLLL_212.xml	18/04/2019 12:27:06	18/12:

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.

**B2B: Student Setup**

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
B2BS LA Data Processi...		✗		
Activity Log	✗			
Error Log	✗			
Export Job Progress	✗			
Import Job Progress	✗			
Incoming Students		✓		
LA Scheduled Tasks	✗			

**01. Main Processes**

Main Business Processes: B2BS Conflict Management

---

**02. Business Processes**

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		✓		

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

**Incoming Students** From 03/06/2018 To 10/06/2019

Base Types: All    Bases Selected: 1    Total No. Students: 138    Unmatched: 5

Pending: 0    Matched with Conflicts: 133    Deleted by School: 1

Unmatched | **Matched with Conflicts** | Deleted by School | Manage Incoming Students

Incoming Data Filter     Address     SEN     Leavers     Exclusions     Looked After

Filters        *Base Name*        *Reg Group*    *File ID*

*Task Cohort*    *Task Data Type*    *DOB: (dd/mm/yyyy)*

[Clear Filters](#)

1 Student(s)    [Wide View](#)    [Export](#)

<input checked="" type="checkbox"/>	All	Name	UPN	Base Name	NCY	Reg. Grp	File ID	File Creation Date/Time
<input checked="" type="checkbox"/>		Gartwright, F	16/03/2003	Green Abbey School	11	11 - CN	8204321_CES_820LLLL_212.xml	18/04/2019 12:27:06

[Add New](#)

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

Conflicting Items				
<a href="#">Ethnicity</a>				
▼ <b>Ethnicity</b>				
One Record WEN WENG - White English				
Incoming Record				
Value	File Creation Date/Time	Reason	Accept	Reject
WROR	18/04/2019 12:27:06	Conflict	<input type="checkbox"/>	<input type="checkbox"/>

## 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](#) on page 47 below for the priority order in which the first screen/tab will be displayed.

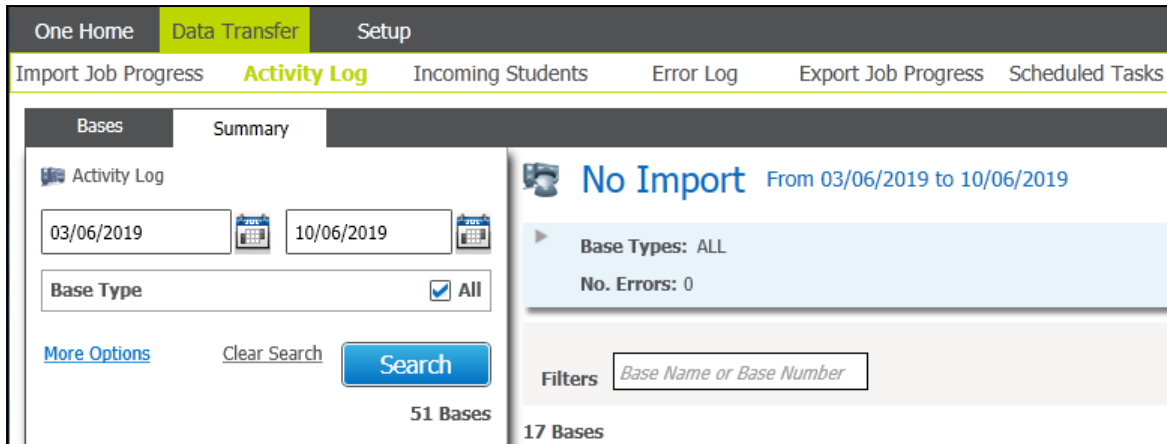
This is best illustrated by the following example:

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**.

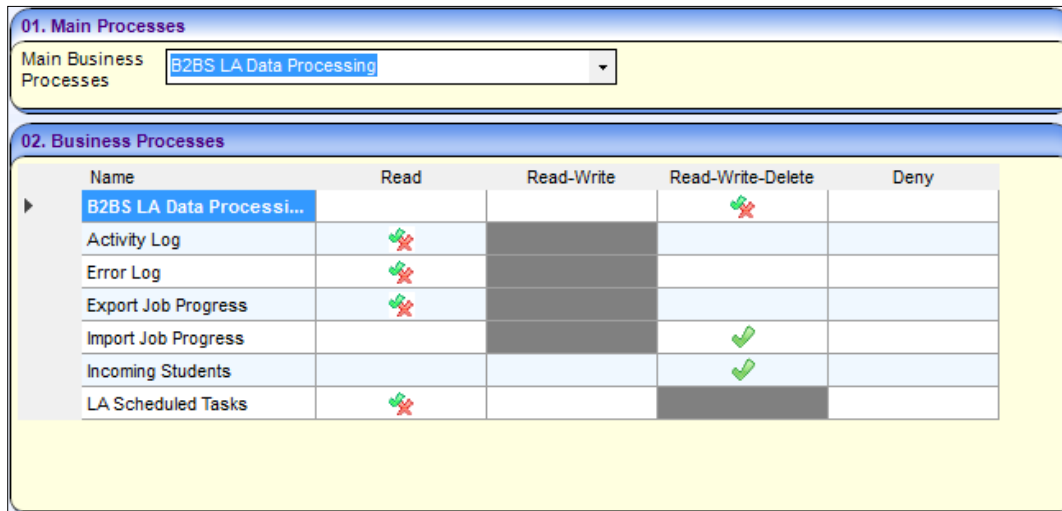
01. Main Processes				
Main Business Processes	B2BS LA Data Processing			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
▶ B2BS LA Data Processi...			✓	
Activity Log			✓	
Error Log			✓	
Export Job Progress			✓	
Import Job Progress			✓	
Incoming Students			✓	
LA Scheduled Tasks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

01. Main Processes				
Main Business Processes	B2BS LA Administration			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
▶ B2BS LA Administrat...	✗			
Data Processing Rules	✗			
Export Rules	✗			
Report Defaults				✓
System Defaults	✓			

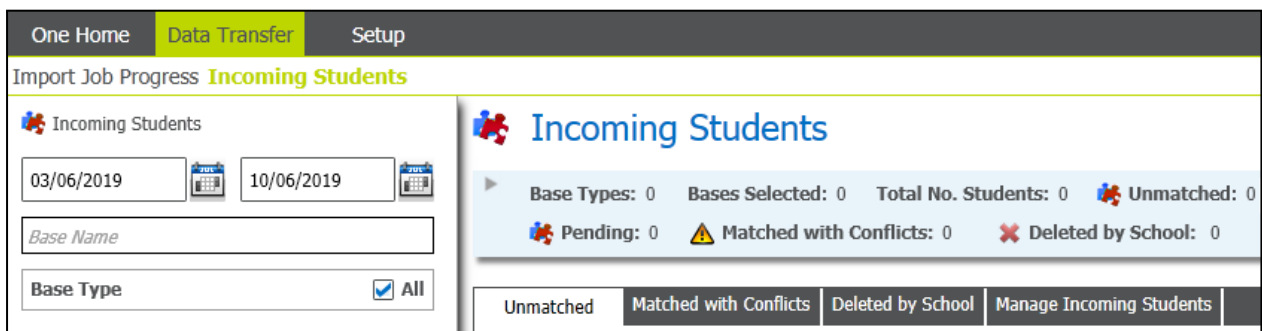
Therefore when a user belonging to that User Group signs onto One Online, they will have access to the **B2B:Student** button on the One Online Homepage. Upon clicking on that button, they will be taken to the **Data Transfer** main tab with the **Activity Log – Summary** screen displayed by default.



Within the B2BS LA Data Processing main Business Process, the following Permissions can be 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) 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
- FSM Claims By Student
- 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:

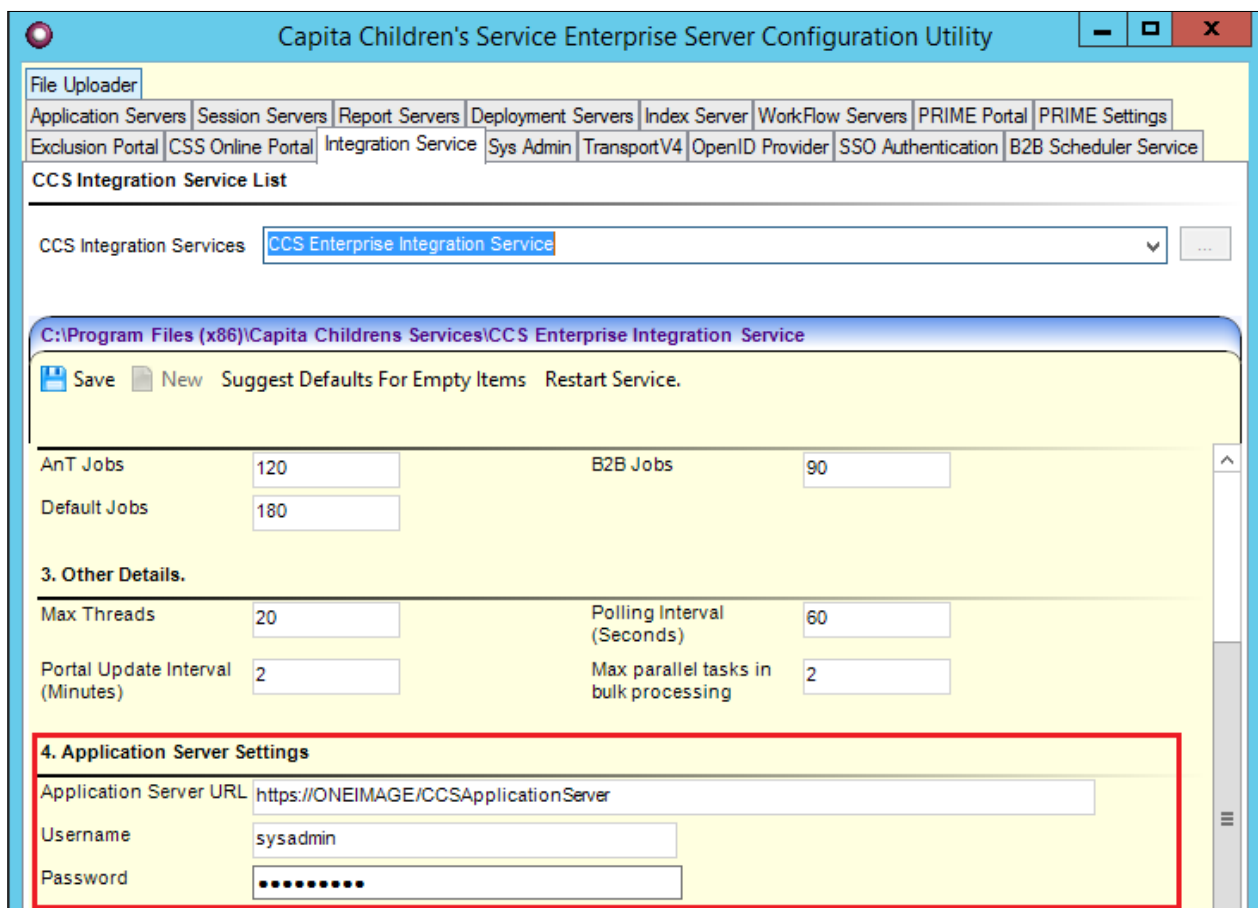
- **Read** – this means that the user will be able to view the data in the conflict in the relevant tab but the user will not be able to process any data.
- **Read-Write** – this means that the user will be able to view the data in conflict in the relevant tab; the user will also be able to **Accept**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

Name	Read	Read-Write	Read-Write-Delete	Deny
Data Importing		✗		
CTF Importing				✓
Early Years Enquiries				✓
Early Years Thirty Hour Checks				✓
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.

Name	Read	Read-Write	Read-Write-Delete
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				
Export Job Progress				
Import Job Progress				
Incoming Students				
LA Scheduled Tasks				

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

**Invalid Request(s)**

'Activity Log': You cannot set this process as selected, because this will invalidate the following processes available to the User Group: Incoming Students.

'Error Log': You cannot set this process as selected, because this will invalidate the following processes available to the User Group: Incoming Students.

'Export Job Progress': You cannot set this process as selected, because this will invalidate the following processes available to the User Group: Incoming Students.

'Import Job Progress': You cannot set this process as selected, because this will invalidate the following processes available to the User Group: System Defaults, Incoming Students.

'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.

'LA Scheduled Tasks': You cannot set this process as selected, because this will invalidate the following processes available to the User Group: Incoming Students.

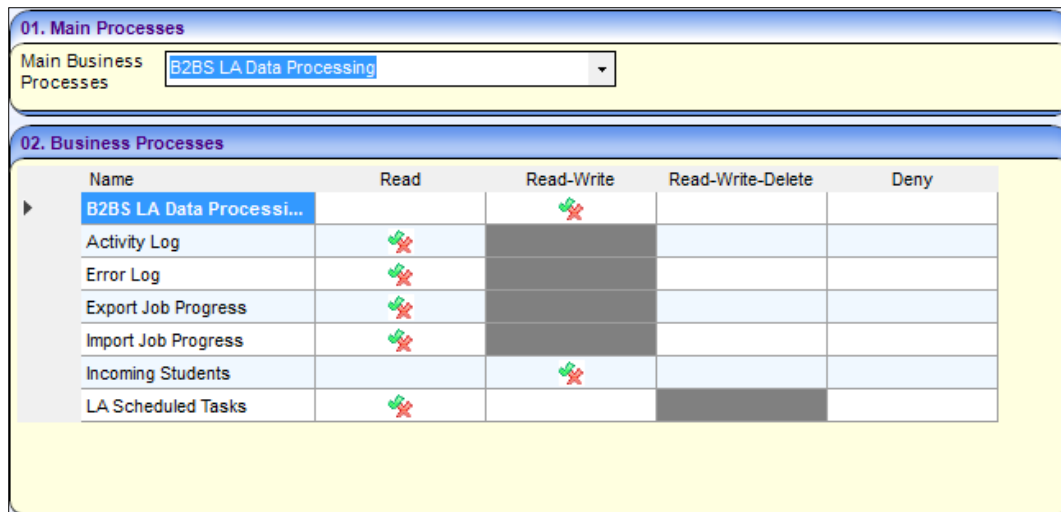
If you continue the system will:

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?

Yes No

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



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

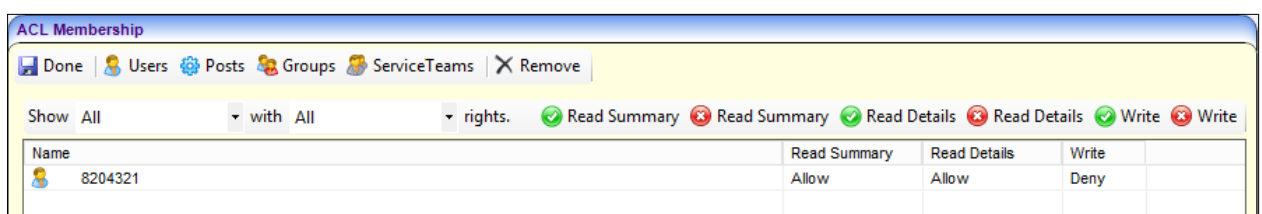
- Incoming Students | Matched with Conflicts tab | Manage Data Conflicts hyperlink | Carers tab | Unmatched (Carers)
- Incoming Students | Matched with Conflicts tab | Manage Data Conflicts hyperlink | Carers tab | Matched (Carers) with Conflicts

This is best illustrated by the following examples:

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

**Focus | People | Person | <student> | Set ACL**

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



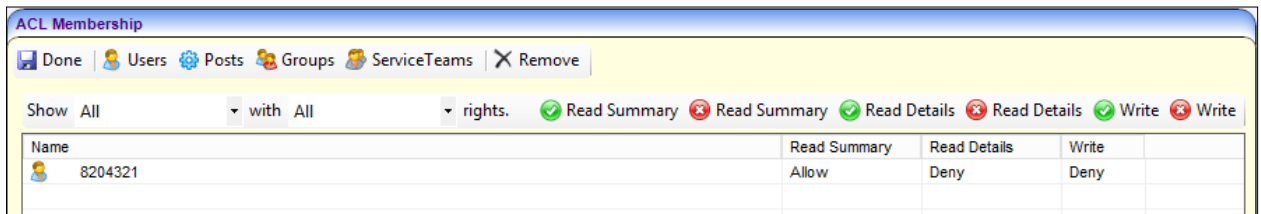
These ACL definitions will allow the logged on user to view the summary line of the Student returned in both the Unmatched and Matched tabs. They will also be able to view the Possible Matches search results window in the Unmatched tab and details of students via the hyperlinks. However, they will not be able to select a result to match with the Unmatched Student, nor will they be able to select the hyperlink in the Matched tab. If they attempt to do so, they will receive the following:

**Capita One – Error during ACL Check**  
 User has insufficient ACL permissions

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

**Focus | People | Person | <student> | Set ACL**

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



Name	Read Summary	Read Details	Write
8204321	Allow	Deny	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 Student to match with the Unmatched Student. If they attempt to click on the hyperlink, they will receive the following:

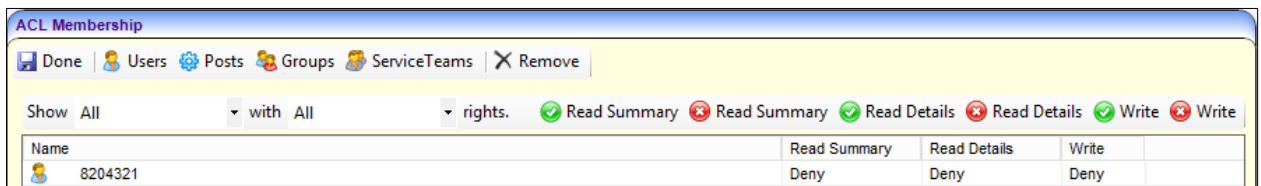
**Capita One – Error during ACL Check**  
 User has insufficient ACL permissions to view this record

Similarly, if they will not be able to view details of that Student via the hyperlink in the Matched tab.

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

**Focus | People | Person | <student> | Set ACL**

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



Name	Read Summary	Read Details	Write
8204321	Deny	Deny	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. Similarly, they will not be displayed in the Matched tab.

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 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. The settings can be found in **v4 online | Administration | System Admin | Personnel Control**.

Personnel control			
Fields to be hidden for people flagged as Personnel control			
	Hidden		Hidden
Surname	<input type="checkbox"/>	Date of birth	<input checked="" type="checkbox"/>
Forename	<input type="checkbox"/>	NI number	<input checked="" type="checkbox"/>
Middle name	<input type="checkbox"/>	Registered disabled	<input type="checkbox"/>
Title	<input type="checkbox"/>	Disability number	<input type="checkbox"/>
Gender	<input type="checkbox"/>	Impairment status	<input type="checkbox"/>
Known by	<input type="checkbox"/>	Disability	<input type="checkbox"/>
Business phone	<input checked="" type="checkbox"/>	Ethnic origin	<input checked="" type="checkbox"/>
Mobile phone	<input type="checkbox"/>	Home language	<input type="checkbox"/>
Fax	<input checked="" type="checkbox"/>	Reference	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	Base address	<input type="checkbox"/>
Correspondence address	<input type="checkbox"/>		

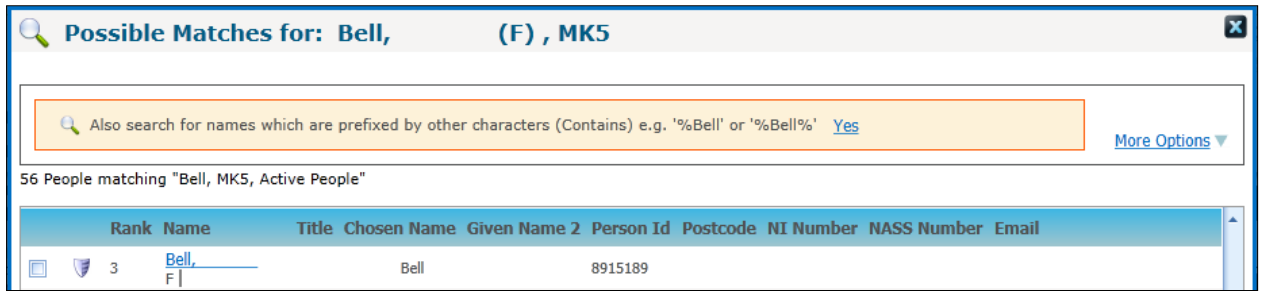
This affects the following areas in B2B:Student:

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

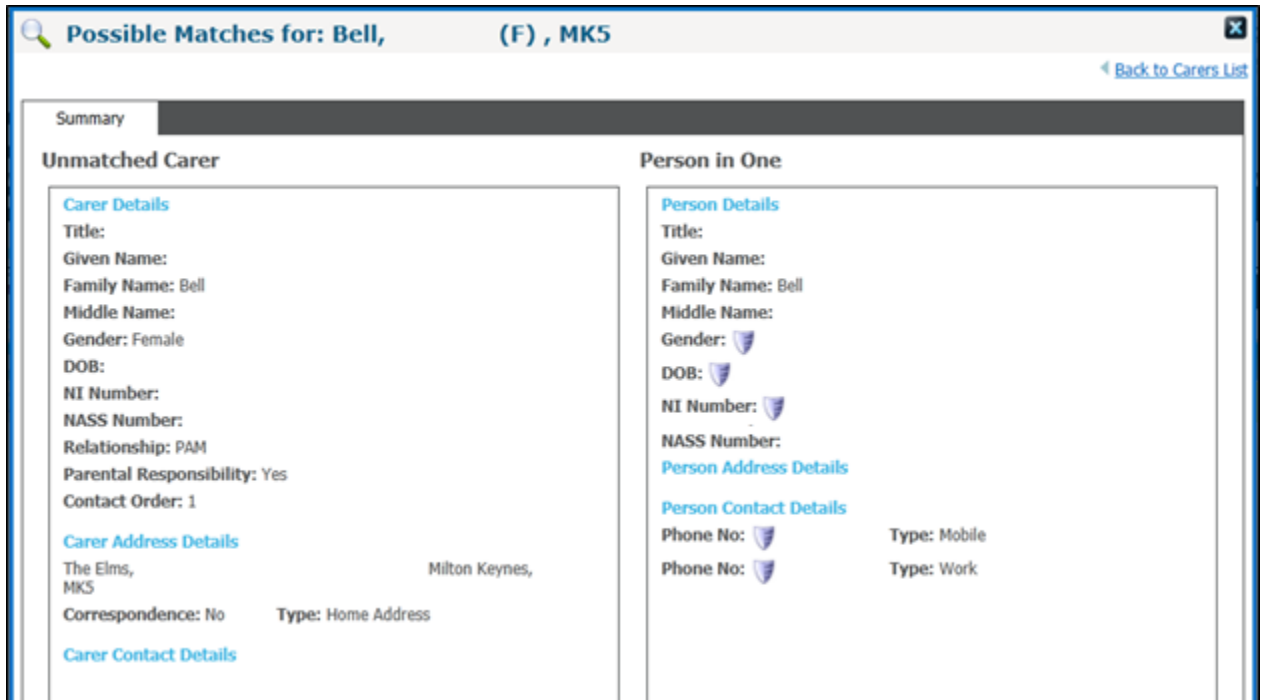
The screenshot shows the 'Conflicting Items' section with a sub-section for 'Matched with Conflicts (1)'. It displays a table with columns: Title, Given Name, Family Name, Middle Name, Gender, Relationship, and Parental Responsibility. The entry for 'Bell' has a shield icon in the Gender column. Below this, there is a comparison between an 'Incoming Record' (The Elms, Milton Keynes, MK5) and a 'One Record' (Bell). The reason for conflict is listed as 'Conflict'. To the right, the 'One Record' details for 'Bell' are shown, including Carer Details (Title, Given Name, Family Name, Middle Name, Gender, DOB, NI Number, NASS Number, Relationship, Parental Responsibility, Contact Order) and Carer Contact Details (Phone No., Type).

- **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.

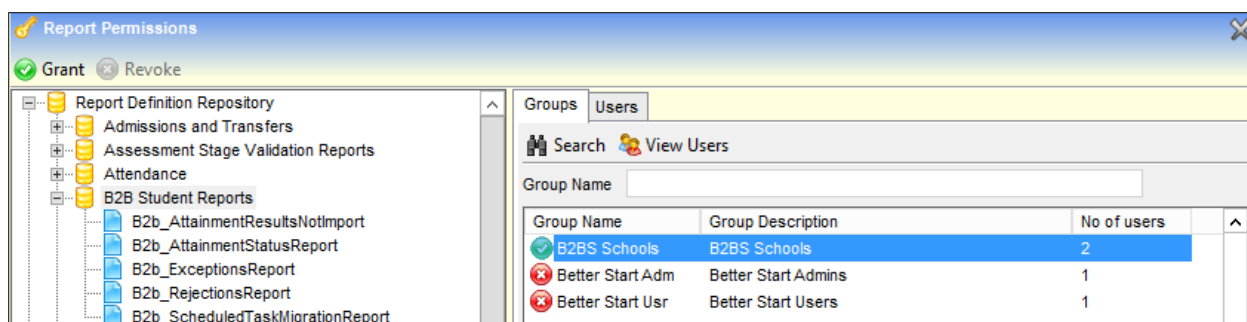
For more information on assigning folder permissions in Windows, refer to the *Set, View, Change, or Remove Permissions on Files and Folders* article available from Microsoft.com.



## Report Permissions

### Tools | 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**.



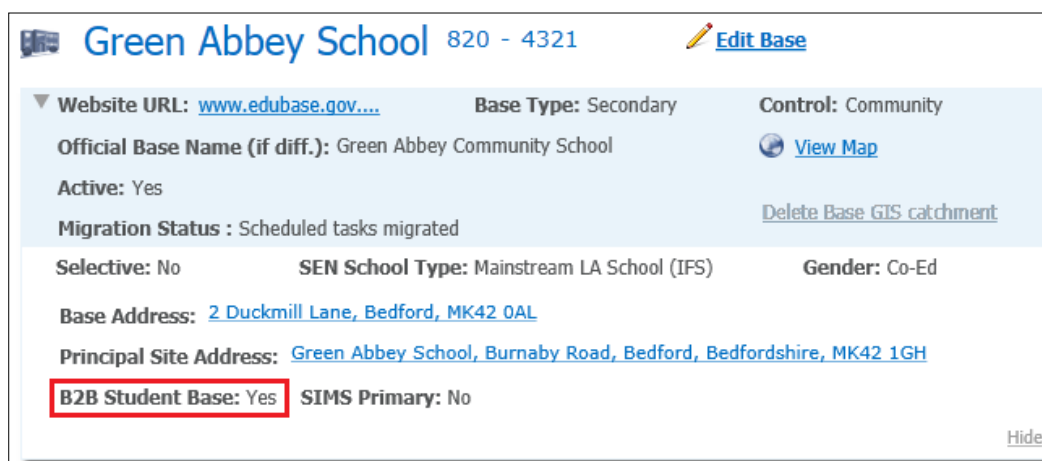
If the appropriate permissions are not set for you then you when you try and run the Exceptions and Rejections Reports the system will display a message informing you that you do not have the appropriate permissions.

#### Capita One – Report Permissions

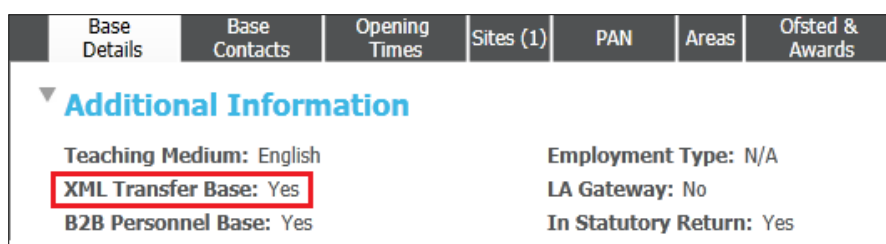
You do not have permission to administer reports or access report folders. Please contact your permissions administrator.

## Setting up Bases as B2B: Student Bases

For both SIMS and non-SIMS bases, the **B2B Student Base** tickbox should be ticked so that incoming files are processed within **v4 online | B2B Student**. This can be done in either **v4 online | Bases** or **v4 client | Bases**.



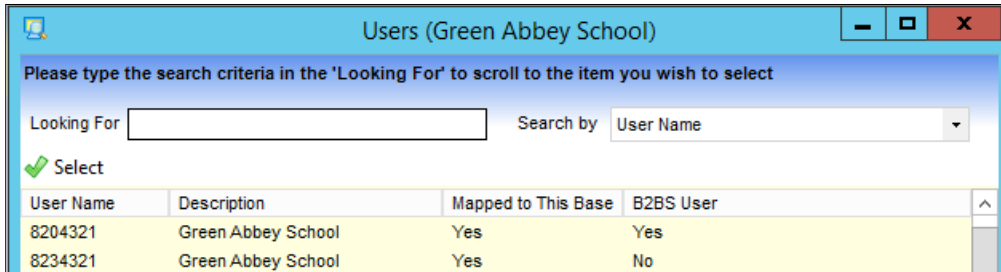
It is advised that Local Authorities ‘untick’ the **XML Transfer Base** tickbox as manually imported files are now processed in **v4 online | B2B Student**.



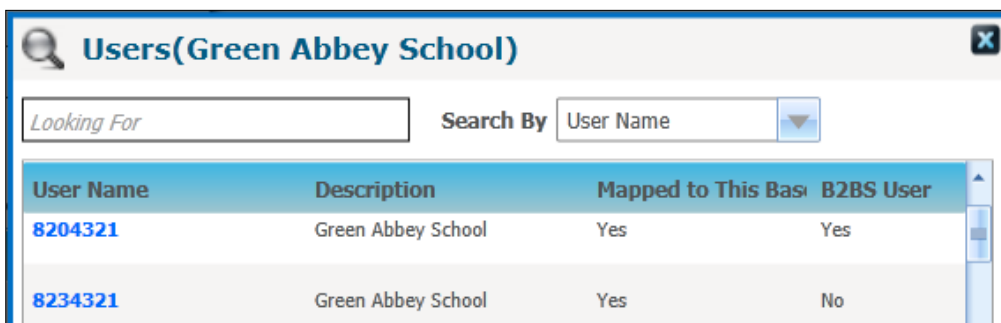
Upon checking of the B2B:Student Base flag, you will be able to select a User ID which will be used to identify that the updated information for a Student in One came from B2B:Student.

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.

**V4 client | Bases**



**V4 online | Bases**



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

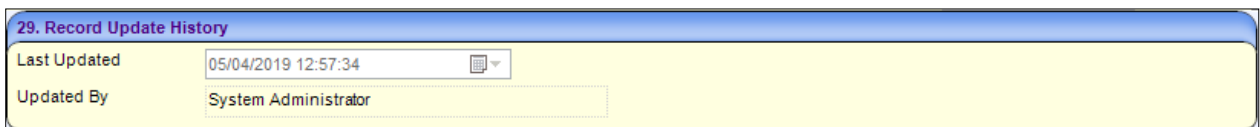
**NOTE:** This screen will only allow you to select an existing One User ID; maintenance of One User IDs will continue to be available through System Administration.

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 client:-



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 client 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.

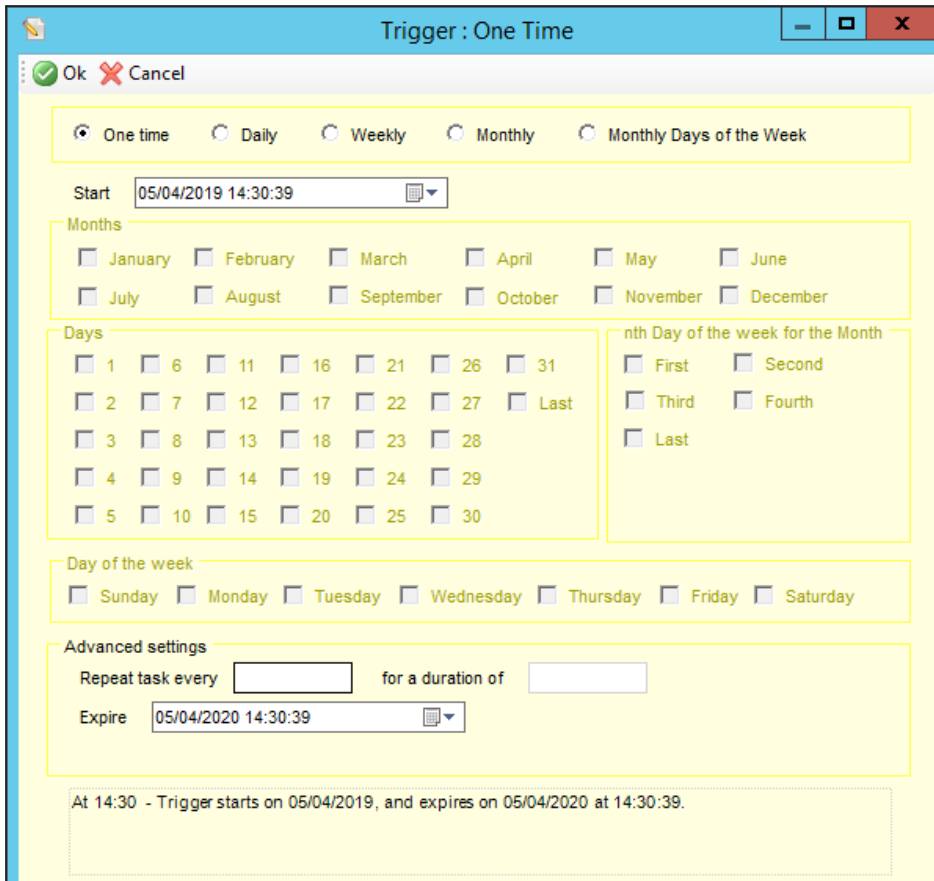
## Setting up Scheduled Tasks in v4 client

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**.

The screenshot shows the '01. General' configuration panel for a scheduled task. The panel is yellow and contains the following fields and controls:

- Name:** A text input field.
- Description:** A large text area with a vertical scrollbar on the right.
- If the task is already running, then the following rule applies:** A dropdown menu with the selected option 'Do not start a new instance'.
- Logging level:** A dropdown menu with the selected option 'Unspecified'.
- Enabled:** A checkbox that is checked, with a checkmark icon to its right.
- Application Server:** A dropdown menu with the selected option 'Application Server 1'.
- Author Name:** A text input field.
- Created on:** A date and time input field with a calendar icon.
- Updated By:** A text input field.
- Last Updated:** A date and time input field with a calendar icon.

3. Click the **Add** button in the **02.Trigger** panel.  
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.



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 depending on the settings that have been defined in v4 Online via **Setup | System Defaults**. For more information, see [Setup System Defaults](#) on page 43

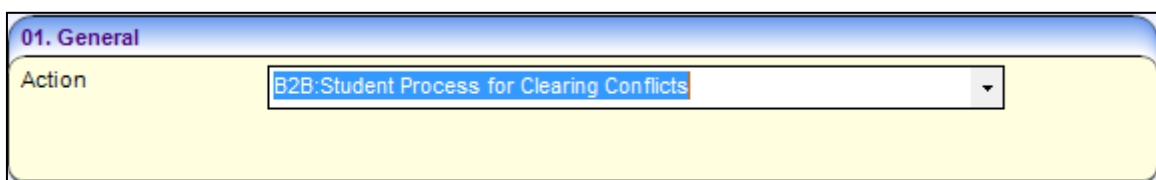
4. To complete the setup of the Scheduled Task click the **Add** button in the **03. Actions** panel.

### Setting up a 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 process exists 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.

- a. Select **B2B:Student Process for Clearing Conflicts** from the **Action** drop down.



- b. 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.

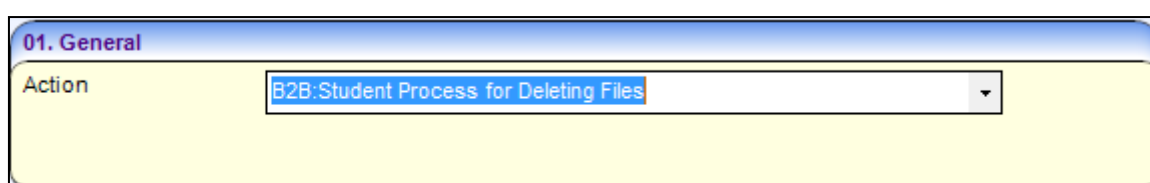
Any other conflicts for other tabs where the incoming data is different to the data held in One for the Student will continue to display this information in the relevant tabs and will not be cleared.

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.

- a. Select the **B2B:Student Process for Deleting Files** option from the **Action** drop-down list.



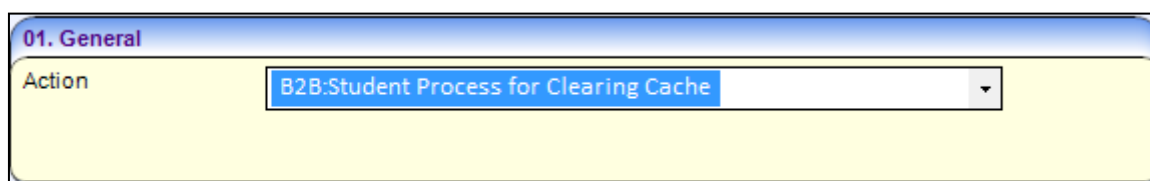
The screenshot shows a software interface with a blue header bar containing the text '01. General'. Below the header is a yellow background area. On the left side of this area, the word 'Action' is displayed. To the right of 'Action' is a dropdown menu with a white background and a blue border. The text 'B2B:Student Process for Deleting Files' is selected and displayed in the dropdown menu.

- b. Click the **Save** button.

## Setting up a Scheduled Task for Clearing Cached Data

This process will schedule cache flushes, so that all data being imported can be routinely verified.

- a. Select the **B2B:Student Process for Clearing Cache** option from the **Action** drop-down list.



The screenshot shows a software interface with a blue header bar containing the text '01. General'. Below the header is a yellow background area. On the left side of this area, the word 'Action' is displayed. To the right of 'Action' is a dropdown menu with a white background and a blue border. The text 'B2B:Student Process for Clearing Cache' is selected and displayed in the dropdown menu.

- b. Click the **Save** button.

# Data Processing Rules

## Setup | 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.

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.

To set up the Data Processing Rules you need to do the following:

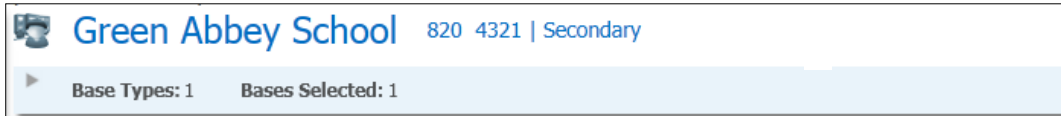
1. Select **Setup | Data Processing Rules** to display search fields relating to Data Processing Rules.
2. Enter **Base Name**, **School No** and/or **Base Type**. Partial information can be used for **Base Name** and **School No**.

3. Enter further search criteria into the fields as required. To display further search options, select the **More Options** hyperlink.
4. Click the **Search** button to display a list of bases that meet your criteria.

**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 Bases.

5. 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.



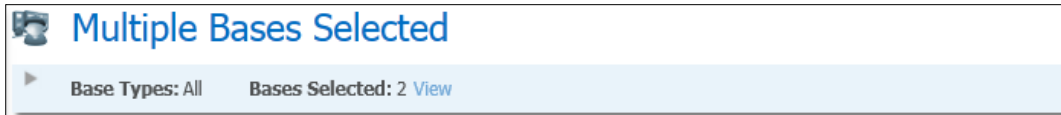
This will display the Data Processing rules that have been set for the selected Base.

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

**Capita One – Multiple Bases**  
 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 to view existing Data Processing Rules that have been defined for multiple bases at the same time as the screen can only display a single set of **Data Groups/Items**. Instead a default screen will be displayed allowing the users to select items to set for all selected bases.

If more than one school is selected, the header of the school displays as follows:



Clicking the **View** link displays the **Selected Bases** in a pop up window showing: **Base Name**, **LA No.**, **School No.** and **Base Type**.

### Data Groups/Data Items

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 Groups / Items	Always Import	Always put in Conflict	Import if Null else put in Conflict	Don't Import
Student Exclusions	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

- **Data Items** – Individual items within a 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.

## B2B: Student Setup

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 type="radio"/>	<input type="radio"/>	<input type="radio"/>
Boarder	<input checked="" type="radio"/>	<input 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 type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Connexions Assent/YSSA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

There are three **Data Groups** with **Data Item** subsets:

Student Basic Details	Student Identifiers	Carer Details - PORTALS																																						
<table border="1"> <thead> <tr> <th>Data Groups / Items</th> </tr> </thead> <tbody> <tr> <td>Student Basic Details</td> </tr> <tr> <td>Boarder</td> </tr> <tr> <td>Chosen Family Name</td> </tr> <tr> <td>Chosen Given Name</td> </tr> <tr> <td>Connexions Assent/YSSA</td> </tr> <tr> <td>EAL</td> </tr> <tr> <td>First Language</td> </tr> <tr> <td>Former UPN</td> </tr> <tr> <td>Gifted and Talented</td> </tr> <tr> <td>Given Name 2</td> </tr> <tr> <td>Home Language</td> </tr> <tr> <td>Medical Flag</td> </tr> <tr> <td>Mode of Travel</td> </tr> <tr> <td>National Identity</td> </tr> <tr> <td>NCY</td> </tr> <tr> <td>Part Time</td> </tr> <tr> <td>Reg Group</td> </tr> <tr> <td>Religion</td> </tr> </tbody> </table>	Data Groups / Items	Student Basic Details	Boarder	Chosen Family Name	Chosen Given Name	Connexions Assent/YSSA	EAL	First Language	Former UPN	Gifted and Talented	Given Name 2	Home Language	Medical Flag	Mode of Travel	National Identity	NCY	Part Time	Reg Group	Religion	<table border="1"> <thead> <tr> <th>Data Groups / Items</th> </tr> </thead> <tbody> <tr> <td>Student Identifiers</td> </tr> <tr> <td>Date of Birth</td> </tr> <tr> <td>Family Name</td> </tr> <tr> <td>Gender</td> </tr> <tr> <td>Given Name</td> </tr> <tr> <td>Unique Learner Number</td> </tr> <tr> <td>Unique Pupil Number</td> </tr> </tbody> </table>	Data Groups / Items	Student Identifiers	Date of Birth	Family Name	Gender	Given Name	Unique Learner Number	Unique Pupil Number	<table border="1"> <thead> <tr> <th>Data Groups / Items</th> </tr> </thead> <tbody> <tr> <td>Carer Details - PORTALS</td> </tr> <tr> <td>Forename</td> </tr> <tr> <td>Surname</td> </tr> <tr> <td>Title</td> </tr> <tr> <td>Date Of Birth</td> </tr> <tr> <td>Gender</td> </tr> <tr> <td>Carer Relationship</td> </tr> <tr> <td>Parental Responsibility</td> </tr> <tr> <td>National Insurance Number</td> </tr> <tr> <td>NASS Number</td> </tr> </tbody> </table>	Data Groups / Items	Carer Details - PORTALS	Forename	Surname	Title	Date Of Birth	Gender	Carer Relationship	Parental Responsibility	National Insurance Number	NASS Number
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National Identity																																								
NCY																																								
Part Time																																								
Reg Group																																								
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Where the **Data Group** has a subset of **Data Items** (e.g. **Student Identifiers**, **Student Basic Details** and **Carer Details - PORTALS**), select the **Data Group** then expand the list. Clicking the radio button for the **Data Group** will flood fill all the Data Items that exists within it. Local Authorities can select different Data Processing Rules for these Data Items if required.

Data Groups / Items	Always Import	Always put in Conflict	Import if Null else put in Conflict	Don't Import
Student Identifiers	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Date of Birth	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family Name	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gender	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Given Name	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unique Learner Number	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unique Pupil Number	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

For those **Data Groups** without a subset of **Data Items**, simply select the radio button on the **Group**.

Data Groups / Items	Always Import	Always put in Conflict	Import if Null else put in Conflict	Don't Import
Student FSM History	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Importing from Portals

The Data processing Rules for importing carers are split between B2B and Portals to allow more flexibility for Local Authorities that don't wish to import carer details through B2B but do require carer details for children imported through Citizen Portal (eg Early Years, Provider Portal, etc).

Data Processing Rules	Rules for Unmatched Records			
Data Groups / Items	Always Import	Always put in Conflict	Import if Null else put in Conflict	Don't Import
Carer Address Details - B2B	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Carer Contact Details - B2B	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Carer Details - B2B	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Carer Address Details - PORTAL	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Carer Contact Details - PORTAL	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Carer Details - PORTALS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Forename	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Surname	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Title	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Date Of Birth	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gender	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Carer Relationship	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Parental Responsibility	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
National Insurance Number	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NASS Number	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



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**.

#### ■ **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.

**NOTE:** The Date 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.

#### ■ **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. 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 will be set to **Always put in Conflict**.

#### ■ **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**.

### **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** 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 Unmatched 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 have been selected you must click the **Save** button. Select **Yes** to save the changes made for the **Data Groups/Data Items** for the selected Base(s). Click **No** to undo the changes that have been made.

### Data Groups with different subset rules

Where a **Data Group** has a subset of **Data Items**, these can be set to different values if required. In this instance, the radio button for the **Data Group** will be unset to indicate that the subset has differing Rules applied.

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 type="radio"/>	<input type="radio"/>	<input type="radio"/>
Boarder	<input checked="" type="radio"/>	<input 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 type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Connexions Assent/YSSA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

## Rules for Unmatched Records

### Setup | Data Processing Rules | Rules for Unmatched Records

Data Processing Rules Rules for Unmatched Records

#### Unmatched Student Records

Add Students if Unmatched

Default LA No.

#### Unmatched Carer Records

If no match found for carer then add person as carer to the child

If carer matches existing person in One, add as carer to the child

Place in unmatched unless exact match found against child's existing carer(s)

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.

**Note:** Students may show as Unmatched where the system isn't able to make a definitive match even if one exists on the One database. Automatically adding these students could lead to duplicate data being created.

## B2B: Student Setup

- 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.

### 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 8.

## Setting up Rules to Export Changed or Rejected Data

### Setup | Export Rules

This area allows you to specify which Bases you wish to set the **Export Changes/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**.

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 include Active bases which are flagged as B2B: Student Bases (i.e. the **B2B Student Base** checkbox is 'ticked'), but **Show Inactive** or **Show All** options are available by selecting the appropriate radio button.

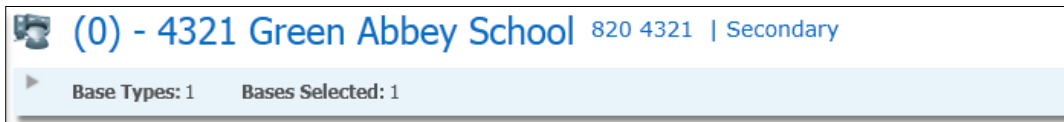
When the **Search** button is clicked the system will display the list of Bases that meet the criteria that have been defined, this will include a count of the number of Bases that have been retrieved.

**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 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).

Data Groups / Items	Export Changes	Export Rejections
Student Address Details	<input type="checkbox"/>	<input type="checkbox"/>
▶ Student Basic Details	<input type="checkbox"/>	<input type="checkbox"/>
Student FSM History	<input type="checkbox"/>	<input type="checkbox"/>
▶ Student Identifiers	<input type="checkbox"/>	<input type="checkbox"/>

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



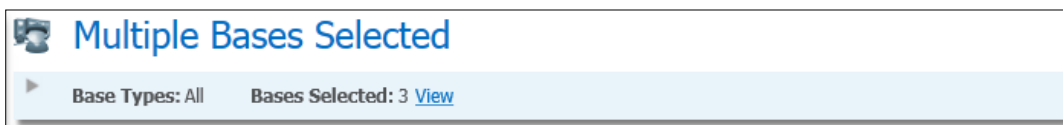
When more than one Base record is selected and the **Display Export Rules** button is clicked, then One displays the following message:

**Capita One – Multiple Bases**

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

**NOTE:** It will not be possible to view existing Export Rules that have been defined for multiple bases at the same time as the screen can only display a single set of **Data Groups/Items**. Instead a default screen will be displayed allowing the users to select items to set for all selected bases.

If more than one school is selected, the header of the school displays as follows:



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**.

Base Name	LA No	School No	Base Type	Email	Base Contact	Contact No.
B2B Open Demo School	820	1010	Primary			
Green Abbey School	820	4321	Secondary			

## Export Changes

This area enables you to specify which data you wish to send back to 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

**Note:** This only applies to Student Address Details, Student Basic Details (Given Name 2 only), Student FSM History and Student Identifiers.

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

In the **Export Changes** column, select the check boxes for the **Data Groups/Items** for which you want to send changes back to the school.

## B2B: Student Setup

Data Groups / Items	Export Changes	Export Rejections
Student Address Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>
▲ Student Basic Details	<input type="checkbox"/>	<input type="checkbox"/>
Given Name 2	<input type="checkbox"/>	<input type="checkbox"/>
Student FSM History	<input type="checkbox"/>	<input type="checkbox"/>
▲ Student Identifiers	<input type="checkbox"/>	<input type="checkbox"/>
Date of Birth	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Family Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>
Given Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Unique Pupil Number	<input type="checkbox"/>	<input type="checkbox"/>

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 Scheduled Task to export data is run. See [Creating a B2B:Student scheduled task](#) on page 112 for further information on creating Scheduled Tasks.

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

## Export Rejections

This area allows you to specify which incoming data you wish to reject from the **Data Groups/Items** 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.

In the **Export Rejections** column, select the check boxes for the **Data Groups/Items** for which you want to send rejections back to the school.

Data Groups / Items	Export Changes	Export Rejections
Student Address Details	<input type="checkbox"/>	<input type="checkbox"/>
▲ Student Basic Details	<input type="checkbox"/>	<input type="checkbox"/>
Given Name 2	<input type="checkbox"/>	<input type="checkbox"/>
Student FSM History	<input type="checkbox"/>	<input checked="" type="checkbox"/>
▲ Student Identifiers	<input type="checkbox"/>	<input type="checkbox"/>
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>
Family Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Given Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Unique Pupil Number	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Click the **Save** button and when the data that has been selected in the **Export Rejections** column is rejected for a Student in One it will send this data to the relevant tables until the Scheduled Task to export data is run. See [Creating a B2B:Student scheduled task](#) on page 112 for further information on creating Scheduled Tasks

# Report Defaults

## Set up | Report Defaults

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

## 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' window with the 'Rejections Report' tab selected. Under the 'Data Groups' section, the following items are listed with checked checkboxes:

- All Data Group
- Student Identifiers
- Student Basic Details
- Student Exclusions
- Student FSM History
- Student Looked After Details
- Student SEN History
- Student SEN Needs
- Student Service Family
- Student Ethnicity
- Student Traveller Family History
- Student Address Details
- Student School History
- Carer Details
- Carer Address Details
- Carer Contact Details

At the bottom right of the window, there is a 'Cancel' link and a 'Save' button.

## 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 - Report Defaults**


Rejections Report | **Exceptions Report**

Unmatched Students	Matched Students
<input checked="" type="checkbox"/> All Incoming Data	<input checked="" type="checkbox"/> All Conflicts
<input checked="" type="checkbox"/> Leavers	<input checked="" type="checkbox"/> Leavers
<input checked="" type="checkbox"/> NCY	<input checked="" type="checkbox"/> Active Admissions and Transfers Student
<input checked="" type="checkbox"/> SEN	<input checked="" type="checkbox"/> Active Child in Employment Student
<input checked="" type="checkbox"/> Ethnicity	<input checked="" type="checkbox"/> Active SEN Student
<input checked="" type="checkbox"/> Looked After	<input checked="" type="checkbox"/> Active Grants and Benefits Student
	<input checked="" type="checkbox"/> Active Transport Student
	<input checked="" type="checkbox"/> NCY
	<input checked="" type="checkbox"/> SEN
	<input checked="" type="checkbox"/> Ethnicity
	<input checked="" type="checkbox"/> Looked After

Cancel **Save**

# Setup System Defaults

## Setup | System Defaults | Default Values

 Setup - System Defaults

Default Values

### Import Job Progress Auto Refresh Defaults

Automatically Refresh Import Job Progress Every:

### Defaults for the Start Date on Searches

Search for last:

### Defaults for the Deletion of Files

Delete Exported Files after:

Delete Imported Files after:

### Delete data stored in cache

Delete items not referenced during imports after:

### Defaults for the Scheduled Tasks

Change 'Last Run Status' to failed if the Scheduled Task has not run after:

### Defaults for attainment Import

File location can be changed on individual attainment tasks

Import attainment file location

Suspense file location

Match only Active Students

[Cancel](#)

## Setting Import Job Progress Auto Refresh Defaults

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

### Import Job Progress Auto Refresh Defaults

Automatically Refresh Import Job Progress Every:

- 5 Seconds
- 10 Seconds
- 30 Seconds
- 1 Minute
- 5 Minutes
- 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

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



Defaults for the Start Date on Searches

Search for last: 7 Days

- 7 Days
- 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

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 Scheduled Tasks](#) on page 30.



Defaults for the Deletion of Files

Delete Exported Files after: 6 Months

Delete Imported Files after: 6 Months

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 Deleting Data Stored in the Cache

This page allows you to define the period after which any cached data will be deleted.

**NOTE:** The files will be deleted only when an appropriate Scheduled Task is set up. For more information, see [Setting up Scheduled Tasks](#) on page 30.

### Delete data stored in cache

Delete items not referenced during imports after:

The value selected here will be used for calculating the period after which the cached data will be deleted when the Scheduled Task for deleting cached data is run. Select one of the following options for the **Delete items not referenced during imports after:** drop down:

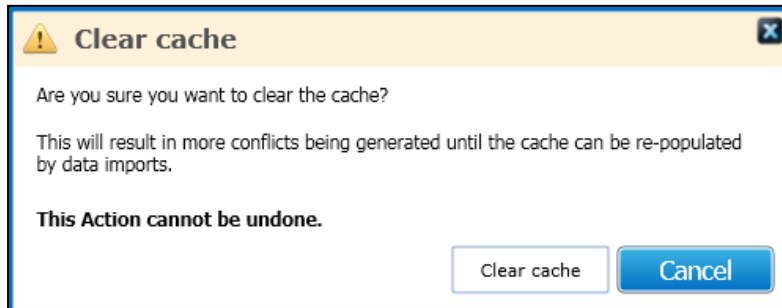
- 1 Month
- 2 Months
- 3 Months
- 4 Months (default)
- 5 Months
- 6 Months
- 7 Months
- 8 Months
- 9 Months
- 10 Months
- 11 Months
- 12 Months
- 13 Months

## B2B: Student Setup

- Never

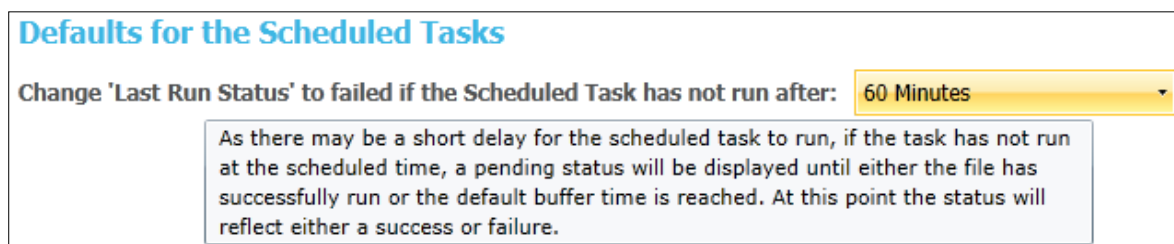
Select the **Save** button; the **Cancel** hyperlink can be selected to undo any changes made and revert to the existing value.

To delete the cache immediately, click the **Clear Cache** button. The following warning will be displayed:



## Defining Defaults for Scheduled Tasks

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**.

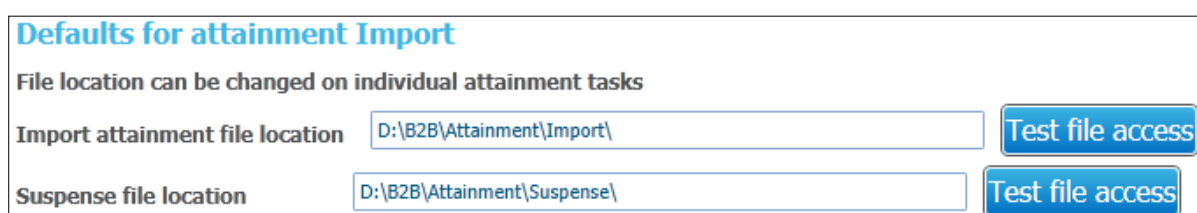


Select one of the following options from the drop down:

- 60 Minutes
- 90 Minutes
- 120 Minutes
- 240 Minutes
- 360 Minutes
- 480 Minutes

## Defining Defaults for Attainment Import

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.

Default Values

✔ Access to the import location is successful

### Defaults for attainment Import

File location can be changed on individual attainment tasks

**Import attainment file location** 
Test file access

**Suspense file location** 
Test file access

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 27.

**IMPORTANT NOTE:** The directories designated in the **Import 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.

## Matching only Active Students

**Match only Active Students**

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.

## 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

## B2B: Student Setup

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
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.

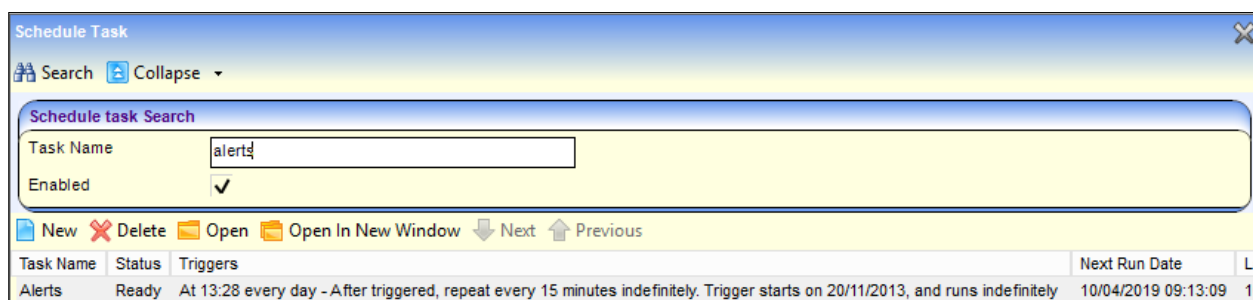
## Alerts

### Defining and Triggering Alerts

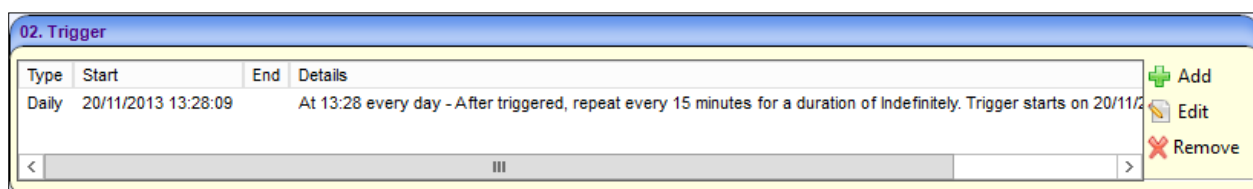
**NOTE:** In v3 there was an option in the System Behaviour of XML Data Exchange that enabled you to Suspend Conflicts for the following: Active A&T Students, Active CIE Students, Active G&B Students, Active SEN Students and Active Transport Students. This feature has been replaced by Alerts in v4 B2B:Student. 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 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



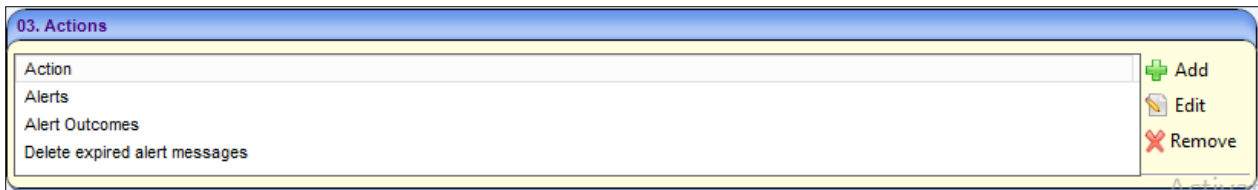
This area enables you to create and maintain a scheduled task that can trigger any B2B:Student alerts that have been defined and activated. You can configure the scheduled task to run at a specific time and frequency.



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.

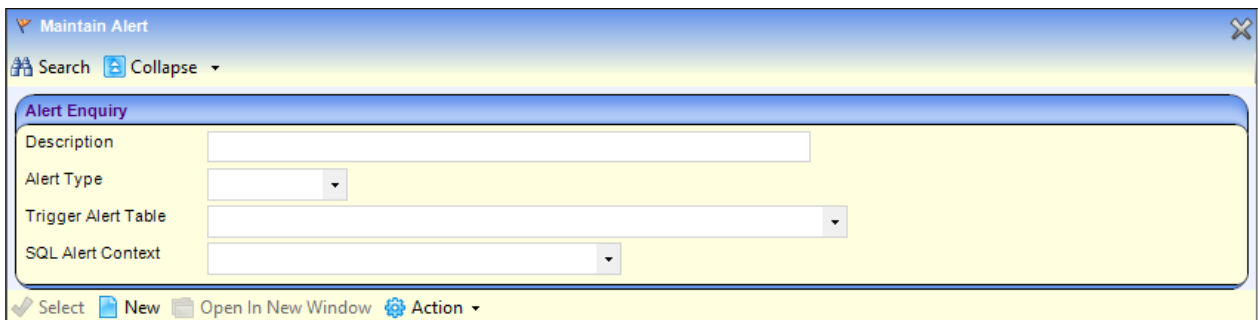
For further details about how to set up and maintain scheduled tasks in v4, please refer to the *Technical Guide – v4 Scheduled Tasks* included with the release.

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.

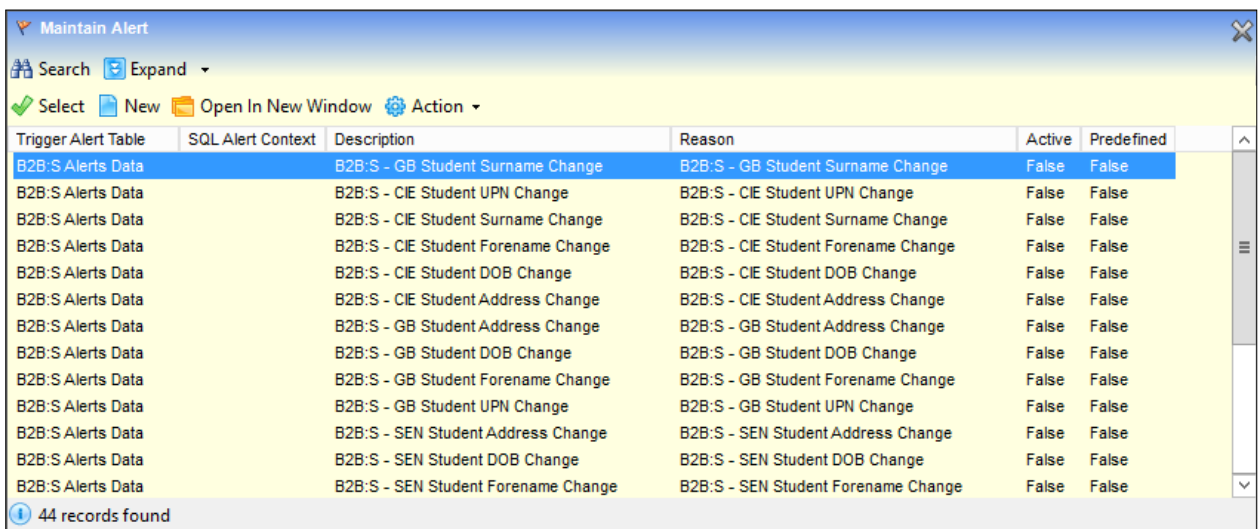


**IMPORTANT NOTES:** Scheduled Task functionality is not required for displaying B2B:Student alert popup messages to the required recipients, these will continue to be displayed upon accessing the student in v4.

### Tools | Administration | Alert Definition



Enter B2B in the **Description** field, click the **Search** button and select the Alert required. By default these alerts will be set as Inactive and the value in the **Active** column will be set to **False** to show this.



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

## B2B: Student Setup

Alert Definition [B2B:S Alerts Data - TRG\_ALERT\_B2B\_GB\_SURNAME]

Save New Activate Delete

1. Alert Definition 2. Trigger Alert 3. SQL Alert 4. Scheduled Alert 5. Recipient List 6. Action 7. View Trigger SQL 2. Trigger Alert

**1. Alert Definition**

Alert Definition ID: 61b0fa69-bb36-4409-b115-f9b3ee1eb726

Alert Type: Trigger

Reason for Alert: B2B:S - GB Student Surname Change

Description: B2B:S - GB Student Surname Change

Active:  Predefined:

**2. Trigger Alert**

Alert Based On: B2B:S Alerts Data B2BS\_ALERTS\_DATA

Database Trigger: TRG\_ALERT\_B2B\_GB\_SURNAME

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\_gb\_change = 'T' and nvl(:new.original\_surname, '') <> nvl(:new.updated\_surname, '')

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.

**5. Recipient List**

Type	Name	Description	Email Address	Email	Popup	Workflow	Portal Message
User	SYSADMIN	System Administrator	sysadmin@capita.co.uk	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Add Users  
 Add Portal Users  
 Add Groups  
 Add People  
 Add Bases  
 Add Posts  
 Add By Query  
 Add Email  
 Remove

The **Action** area in the v4 Client shows what will be displayed for the Email, Popup Message and Workflow Message. This is displayed in the **Message** field of each area.

**6. Action**

To substitute a field into either an email message, popup message, workflow message or SOAP web service, use the syntax @"OLD\_Field Name" or @"NEW\_Field Name" (including the quotation marks) and the value in that field will be substituted into the message. The old value of the field replaces "OLD\_Field Name" and the new value of the field replace "NEW\_Field Name". e.g. The Information for @"OLD\_Surname" has been updated to @"NEW\_Surname".  
 NOTE: A field cannot be substituted into the message for a SQL Alert.  
 There is a maximum character limit: 25,000 (e-mail & workflow) and 2,000 (popup), this is for text which include SQL results.

Preview Action  Preview Message

**e-mail**

Subject

Message  ^  
v

**Popup Message**

Message  ^  
v

Duration   v

Show to all users

**Workflow Message**

Workflow name

Workflow message Please notify the relevant people and their affected departments as soon as possible."/> ^  
v

Duration   v

**SOAP Web Service**

SOAP Web Service

**Portal Message**

Template

When you select to **Save** the details of this Alert the system will display **Do you want to activate the alert?** Select **Yes** to activate the alert or **No** to save without activating.

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

**1. Alert Definition**

Alert Definition ID

Alert Type

Reason for Alert

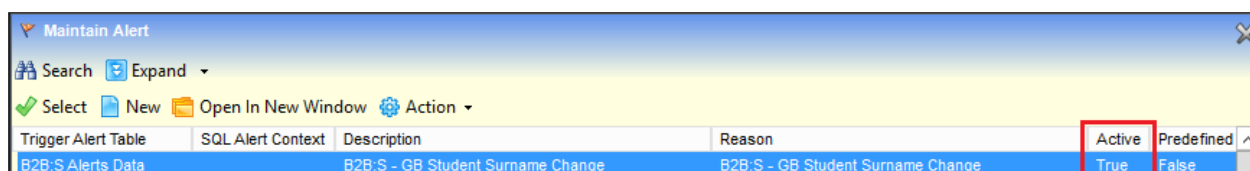
Description

Active   Predefined

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



## B2B: Student Setup



**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, whether the data has been automatically updated 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.onepublications.com](http://www.onepublications.com)).

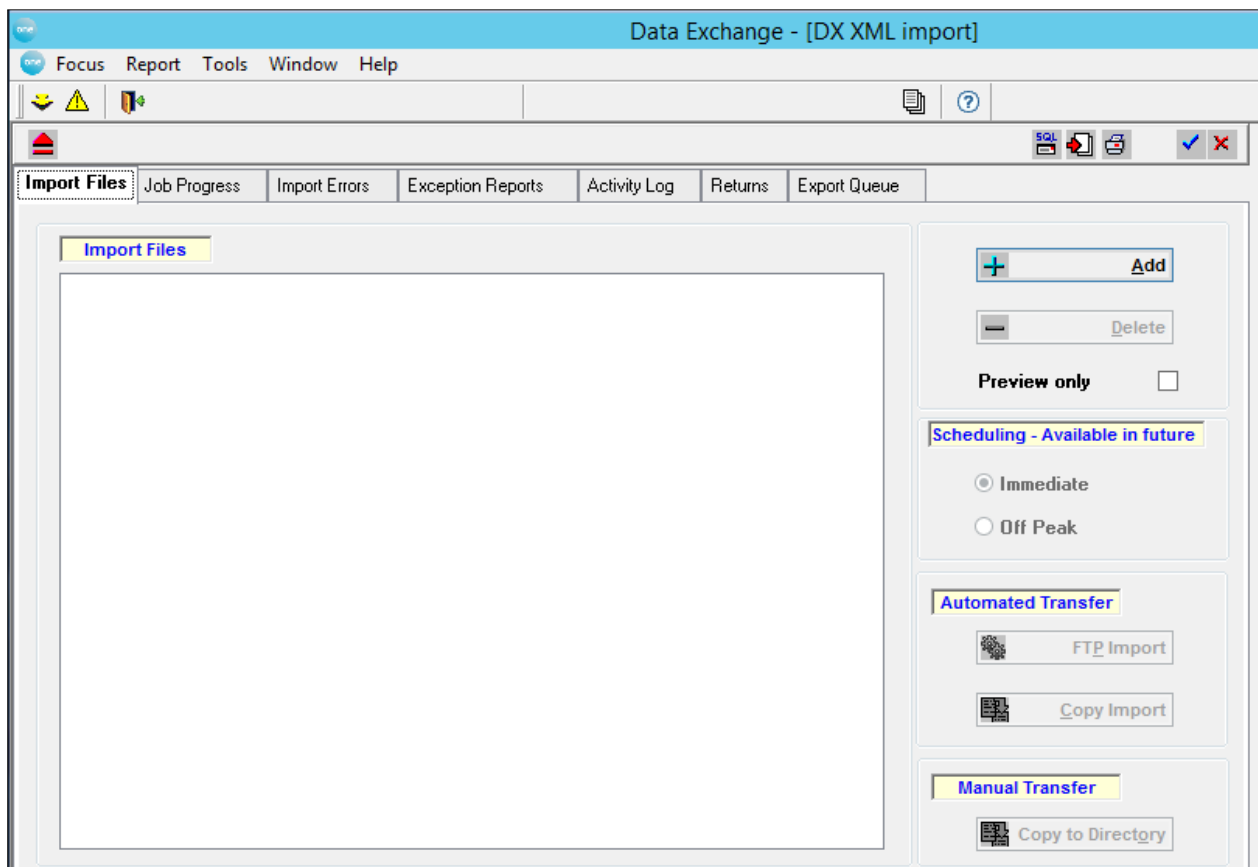
- **B2B Students deleted by schools – Job Failed** – When activated, an email is sent to the LA contact recorded for the school to inform them when an import containing details of students that have been deleted in SIMS has failed. Your One database administrator should retrieve the required data from 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 99

# 04 | Manually Importing Files

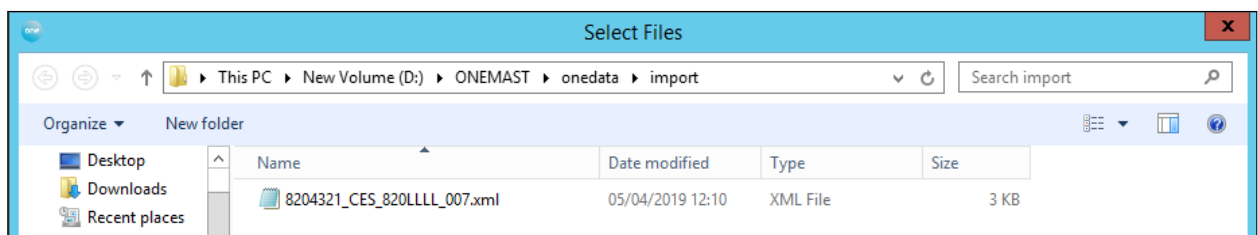
## XML Data Exchange | Focus | Import/Export | Import Files

**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.

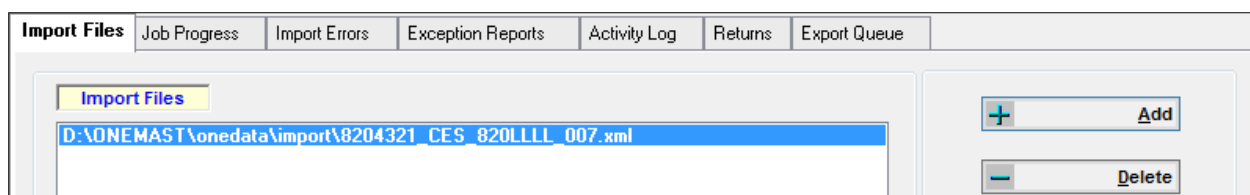
The following screen in XML Data Exchange in v3 allows to you to manually import B2B:Student files into v4 Online.



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.

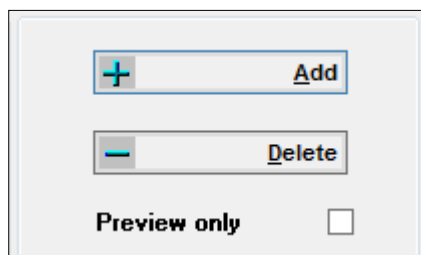


## Manually Importing Files



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

### Preview Only

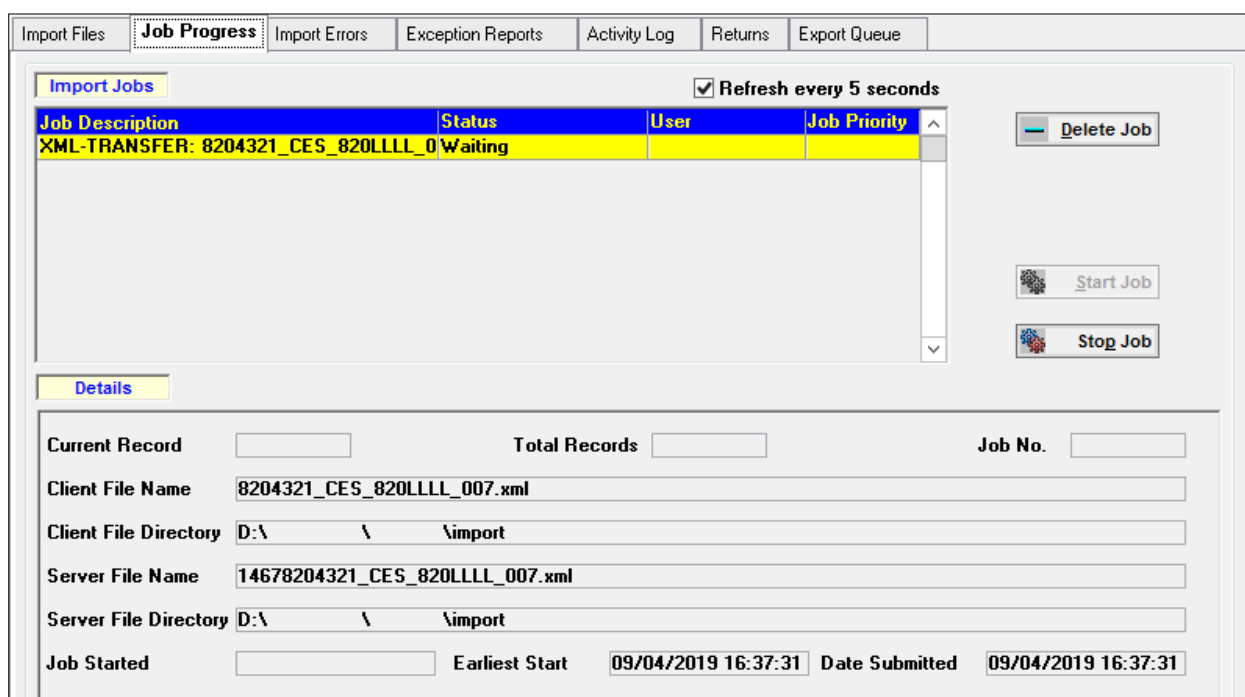


When importing XML data with the **Preview only** box checked, the import process ignores the Data Processing Rules e.g. Add student if Unmatched, and puts everything into the **Incoming Students** area for manual processing.

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 **Job Progress** tab allows you to monitor the import progress.



Once the files have finished processing the file will be moved to the **Import Job Progress** screen in **v4 online | B2B Student** if the **B2B Student** tickbox has been ticked for the Base. See [Data Transfer](#) on page 59 for more information.

## Import Methods

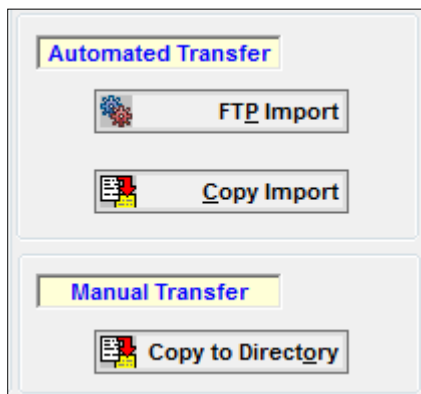
The method of importing data into the database involves a four stage process:

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.



# 05 | Data Transfer

## Import Job Progress

### Data Transfer | Import Job Progress

The **Import Job Progress** area allows you to monitor the status of import jobs; these are any files that have been sent for Schools and are queued up in the B2B:Student v4 tables waiting to be processed.

**Import Job Progress**

Total No. Jobs: 22      Jobs in Progress: 0  
Jobs Queued: 0      Jobs Failed: 0

Filters:      Queued Jobs     Processing Jobs     Failed Jobs

[Refresh](#)    Auto Refresh

All	Base Name	Task Name	File Id	Job Status	Date Received	Status Date
<input type="checkbox"/>	Green Abbey School		15478204321_CES_820LLLL_100.xml	Completed	20/05/2019 08:10:34	20/05/2019 08:11:34

The import progress will refresh, by default, every 5 seconds but this may be changed in the **Setup | System Defaults** area. The **Import Jobs** page will constantly update the progress of all files being imported and monitor the detection of new jobs. Deselect the **Auto Refresh** checkbox if you do not want the Import Job Progress screen to refresh automatically and click the **Refresh** hyperlink to manually refresh this screen.

Select the **Queued Jobs**, **Processing Jobs** and/or **Failed Jobs** checkboxes to filter for those files with that Job Status.

The **Delete** button will be disabled for all jobs in the Import Job Progress expect for those with the Job Status of **Failed**. In order to delete a job that has failed select the job(s) that you wish to delete and ‘tick’ the checkbox; the **Delete** button will be activated, selecting this button will remove the job from the Import Job Progress.

**Import Job Progress**

Total No. Jobs: 5      Jobs in Progress: 0  
Jobs Queued: 0      Jobs Failed: 0

Filters:      Queued Jobs     Processing Jobs     Failed Jobs

[Refresh](#)    Auto Refresh

All	Base Name	Task Name	File Id	Job Status	Date Received	Status Date
<input type="checkbox"/>	Green Abbey School	Green Abbey Changes	8204321_CES_820LLLL_192.xml	Completed	10/04/2019 14:24:52	10/04/2019 14:25:48
<input checked="" type="checkbox"/>	Green Abbey School	Changes	8204321_CES_820LLLL_190.xml	Failed	10/04/2019 11:31:02	10/04/2019 11:31:47

[Delete](#)



**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

This area allows you to view a record of all Import and Export activity within a given date range, including bases from which no data has been received. 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.

### Summary tab

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.

Base Name	LA	Base No.	Reason	Telephone	Email
Applegreen School	820	4401			

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

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 **Base Selection (LA, All, or None)**, **Education Office, URN, or Clusters** if required, as well as **Active, Inactive or All**.

When the **Search** button is clicked the system will displays 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.

45 Bases	
Bases With	Number
No Import	14
No Export	14
No Import and No Export	14
Import	1
Export	1
Import and Export	1

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.

For the Search Criteria specified, the list of **Bases** retrieved is defined as follows for each **Bases With** value:-

- **No Import** - Bases from which an Import has not been received by the LA
- **No Export** - Bases to which an Export has not been sent by the LA
- **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
- **Import** - Bases from which an Import has been received by the LA
- **Export** - Bases to which an Export has been sent by the LA
- **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

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 in the following example:

Base Name	LA	Base No.	Reason	Telephone	Email
B2B Open Demo School	820	1010			

The banner 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.

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**
- **Base Number**
- **Reason**
- **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 by clicking the column header.

You can also filter the list of Bases retrieved 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.

Base Name	LA	Base No.	Reason	Telephone	Email
B2B Open Demo School	820	1010			

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:

The screenshot shows the 'Import' interface for the date range 04/04/2019 to 11/04/2019. It displays summary statistics for the import process, including the number of incoming students, unmatched students, pending students, and students matched with conflicts. A table below the summary lists the bases found, with columns for Base Name, LA, Base No., Number Of Files, Data Groups, Unmatched, Conflicts, Errors, and Email.

Base Name	LA	Base No.	Number Of Files	Data Groups	Unmatched	Conflicts	Errors	Email
<a href="#">Green Abbey School</a>	820	4321	5		2	6	No	<a href="#">Office@GreenA</a>

The banner 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'
- **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](#) section on page 70 and [Matched with Conflicts](#) section on page 78 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 on page 101 for further details.

The system will also return a list of Bases for the highlighted **Bases With** value based on the Search Criteria entered.

**Import** From 04/04/2018 to 11/04/2019

Base Types: ALL

No. Incoming Students: 25   Unmatched: 7   Pending: 0   Matched with Conflicts: 18

No. Errors: 0

Filters:

2 Bases [Wide View](#)

Base Name	LA	Base No.	Number Of Files	Data Groups	Unmatched	Conflicts	Errors	Email
<a href="#">B2B Open Demo School</a>	820	1010	1		1	0	No	
<a href="#">Green Abbey School</a>	820	4321	5		2	6	No	<a href="mailto:Office@Gre">Office@Gre</a>

The following information is displayed in the list:

- **Base Name**
- **LA Number**
- **Base No** - i.e. School Number
- **Number of Files**
- **Data Groups**
- **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

The Bases are listed and displayed by default in **Base Name** ascending order. However all displays may be ordered on all populated columns 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.

Filters:

1 Bases [Wide View](#)

Base Name	LA	Base No.	Number Of Files	Data Groups	Unmatched	Conflicts	Errors	Email
<a href="#">B2B Open Demo School</a>	820	1010	1		1	0	No	

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

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 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.

B2B Open Demo School	
No. of Incoming Students	: 1
No. of Unmatched Students	: 1
No. of Matched (Pending) Students	: 0
No. of Matched Students with Data Conflic	0
No. of Errors	: 0

[View Activity Log Details](#) | [Close](#)

Clicking the **View Activity Log Details** link within the modal window will take you to the Bases tab within the Activity Log which will list all files for the selected base within the **Date Range** selected.

1 Files		<a href="#">Wide View</a>	<a href="#">Export</a>
<input type="checkbox"/> All	File ID	File Creation Date/Time	Transfer Type Data Type Message Type
<input type="checkbox"/>	<a href="#">8201010_CES_820LLLL_082.xml</a>	29/08/2018 13:46:46	Import

## Bases tab

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.

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), as well as a **From Date** (mandatory) and **To Date**.

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

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 **Base Selection (LA, All, or None)**, **Education Office, URN**, or **Clusters** if required, as well as **Active, Inactive** or **All**.

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 side of the screen:

Green Abbey School <span>Secondary</span>	
Base No: 820 4321	Email: <a href="mailto:Office@GreenAbbey.bedford.g">Office@GreenAbbey.bedford.g</a> Education Office: CT Region
Telephone: 01234 878909	Base Contact: <i>Base Contact unknown</i>

[Hide](#)

The **Base Name** and **Base Type** are displayed together with the following additional information about the Base:

- **Base No** - LA Number and School Number

## Data Transfer

- **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 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.

### Bases tab - Import

When this option is selected, the following additional items are displayed in the header panel:



- **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.
- **Deleted by School** – the number of students that have been deleted from the school database
- **No. Errors** – the number of errors encountered during the file import process

▶ Base No: 820 4321	Email: <a href="mailto:Office@GreenAbbey.bedford.g">Office@GreenAbbey.bedford.g</a>	Education Office: CT Region
No. Incoming Students: 8	 <a href="#">Unmatched: 2</a>	Pending: 0
 <a href="#">Matched with Conflicts: 6</a>	 Deleted by School: 0	No. Errors: 0

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](#) section on page 70 and [Matched with Conflicts](#) section on page 78 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 on page 101 for further details.

The system will also return a list of Files as follows:

8 Files <span style="float: right;"> <a href="#">Wide View</a>  <a href="#">Export</a></span>					
All	File ID	File Creation Date/Time	Transfer Type	Data Type	Message Type
<input type="checkbox"/>	<a href="#">8204321_CES_820LLLL_192.xml</a>	10/04/2019 14:24:52	Import		

### Bases tab - Export




When this option is selected, no additional items are displayed in the header panel. The system will also return a list of Files as follows:

3 Files <span style="float: right;"> <a href="#">Wide View</a>  <a href="#">Export</a></span>					
All	File ID	File Creation Date/Time	Transfer Type	Data Type	Message Type
<input type="checkbox"/>	<a href="#">6</a>	10/04/2019 11:46:13	Export		



## Bases tab – Import and Export

When this option is selected, the following additional items are displayed in the header panel:

- **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.
- **Deleted by School** – the number of students that have been deleted from the school database
- **No. Errors** – the number of errors encountered during the file import process
- **No. Students Exported** – the number of student records sent to the school

Base No: 8204321    Email: <a href="mailto:Office@GreenAbbey.bedford.g">Office@GreenAbbey.bedford.g</a> Education Office: CT Region			
No. Incoming Students: 8	 Unmatched: 2	Pending: 0	
 Matched with Conflicts: 6	 Deleted by School: 0	No. Errors: 0	No. Students Exported:

The system will also return a list of Files as follows:

8 Files <span style="float: right;"> <a href="#">Wide View</a>  <a href="#">Export</a></span>					
<input type="checkbox"/> All	File ID	File Creation Date/Time	Transfer Type	Data Type	Message Type
<input type="checkbox"/>	<a href="#">8204321_CES_820LLLL_192.xml</a>	10/04/2019 14:24:52	Import		
<input type="checkbox"/>	<a href="#">6</a>	10/04/2019 11:46:13	Export		

## Bases tab – File list

The following information is displayed in the list of Files:

- **File ID**
- **File Creation Date/Time**
- **Transfer Type**
- **Data Type**
- **Message Type**

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 by clicking the column header.

Click the **Wide View** hyperlink to see the file list in a wide view.

Clicking the **Export** hyperlink will display a **Save As** dialog. You must define the filename and the type of file (this can be \*.csv, \*.xls or \*.htm) and the location where you wish to the file to be saved. Then click **Save**.

The details in the grid will be saved in your preferred format. For example:



## Data Transfer

File ID	File Creation Date/Time	Transfer Type	Data Type	Message Type
14478204321_CES_820LLLL_007.xml	05/04/2019 11:15	Import		
14488204321_CES_820LLLL_007.xml	05/04/2019 11:23	Import		
14678204321_CES_820LLLL_007.xml	10/04/2019 08:52	Import		
4	10/04/2019 11:30	Export		
8204321_CES_820LLLL_190.xml	10/04/2019 11:31	Import		
5	10/04/2019 11:31	Export		
6	10/04/2019 11:46	Export		
8204321_CES_820LLLL_192.xml	10/04/2019 14:24	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.

The File ID for each file shown in the File list 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:

8204321_CES_820LLLL_190.xml	
No. of Incoming Students	: 3
No. of Unmatched Students	: 2
No. of Matched (Pending) Students	: 0
No. of Matched Students with Data Conflik:	1
No. of Errors	: 0
No. of Rejections	: 0
No. of Deleted Students by School	: 0

### Export:

6	
No. of Students Exported	: 1
No. of Errors	: 0
No. of Rejections	: 0

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.

This entry cannot be deleted until all Unmatched Students, Data Conflicts, Deleted by School, Rejected and Export Data Items have been resolved.

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)?

## 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 either All Bases or those specified in the **Search** criteria.

You can refine the search criteria by specifying a From Date, To Date, Base Name or Base Type, either individually or in combination. 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.

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 **Base Selection (LA, All, or None)**, **Education Office, URN, or Clusters** if required, as well as **Active, Inactive or All**.


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.


The system will display the name of the Base alone 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(s) required 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 following:

 **Incoming Students** From 05/04/2018 To 12/04/2019

▶ Base Types: All    Bases Selected: 2    Total No. Students: 9     Unmatched: 3

 Pending: 0     Matched with Conflicts: 6     Deleted by School: 0

- **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 the Unmatched, Matched with Conflicts, Deleted by School areas or are 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)
- **Delete by School** – the total number of students that have been deleted from the school database

## 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 and the **Add Students if Unmatched** checkbox is '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 a warning that a match for the incoming student exists in One but is currently inactive.

The screenshot shows the 'Unmatched' tab in a software interface. At the top, there are navigation tabs: 'Unmatched', 'Matched with Conflicts', 'Deleted by School', and 'Manage Incoming Students'. Below these are filter options: 'Incoming Data Filter' with checkboxes for 'Address', 'SEN', 'Leavers', 'Exclusions', and 'Looked After'. A 'Filters' section contains several dropdown menus and text boxes for 'Surname or Forename', 'Base Name', 'NCY', 'Reg Group', 'File ID', 'Task Cohort', 'Task Data Type', 'DOB: (dd/mm/yyyy)', 'UPN', and 'Post Code'. A 'Clear Filters' link is also present. Below the filters, it indicates '3 Student(s)' and provides 'Wide View' and 'Export' options. A table lists the following data:

All	Name	UPN	Base Name	NCY	Reg. Grp	File ID	File Creation Date/Time
<input type="checkbox"/>	Abbot, F   01/10/2015		Green Abbey School			8204321_CES_820LLLL_190.xml	10/04/2019 11:31:11
<input type="checkbox"/>	Andrews, F   13/12/1955		Green Abbey School			8204321_CES_820LLLL_190.xml	10/04/2019 11:31:11
<input type="checkbox"/>	Aaron, F   01/09/2005		B2B Open Demo School			8201010_CES_820LLLL_082.xml	15/01/2018 11:00:16

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. A Pending status may also indicate that there is an error associated with the record. Clicking on the hyperlink to view a summary of the incoming data will give details of any error at the bottom of the summary (usually in red text).

The screenshot shows the 'Unmatched' tab of a data management system. At the top, there are tabs for 'Unmatched', 'Matched with Conflicts', 'Deleted by School', and 'Manage Incoming Students'. Below the tabs is an 'Incoming Data Filter' section with checkboxes for 'Address', 'SEN', 'Leavers', 'Exclusions', and 'Looked After'. A 'Filters' section contains several input fields: 'Surname or Forename', 'Base Name', 'NCY', 'Reg Group', 'File ID', 'Task Cohort', 'Task Data Type', 'DOB: (dd/mm/yyyy)', 'UPN', and 'Post Code'. A 'Clear Filters' link is below the filters. The main area displays '1966 Student(s)' and a table with columns: 'All', 'Name', 'UPN', 'Base Name', 'NCY', 'Reg. Grp', 'File ID', and 'File Dat'. One student record is visible: 'Abc, Def' (highlighted in red), 'F | 10/10/1995', 'Sachin367BBB', '8', '8A', '8209988\_CES\_820LLLL\_314.xml', and '06/010:1'. At the bottom, there are buttons for 'Add New', 'Discard', 'Reprocess', and 'Match'.

Clicking the **Export** hyperlink will display a **Save As** dialog. You must define the filename and the type of file (this can be \*.csv, \*.xls or \*.htm) and the location where you wish to the file to be saved. Then click **Save**.

The details in the grid will be saved in your preferred format. For example:

The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K
1	Surname	Forename	DOB	Gender	UPN	Base Name	NCY	Reg. Grp	File ID	File Creation Date/Time	File Import Date/Time
2	Abness		29/09/2002	Male		367bbb			8207007_CES_820LL	04/02/2019 13:35	04/02/2019 13:35
3	Abbey		19/09/2002	Male		367bbb			8207007_CES_820LL	04/02/2019 13:35	04/02/2019 13:35

**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.

In the Unmatched tab, you can filter for the Students records that have been retrieved based on the search criteria that you have defined.

## Data Transfer

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, File ID, Task Cohort, Task Data Type, DOB, UPN and Post Code**).

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.

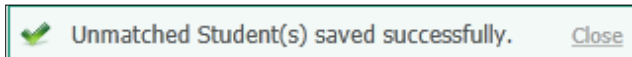
3 Student(s)							Wide View	Export
<input type="checkbox"/> All	Name	UPN	Base Name	NCY	Reg. Grp	File ID	File Creation Date/Time	
<input checked="" type="checkbox"/>	Abbot, F   01/10/2015		Green Abbey School			8204321_CES_820LLLL_190.xml	10/04/2019 11:31:11	
<input checked="" type="checkbox"/>	Andrews, F   13/12/1955		Green Abbey School			8204321_CES_820LLLL_190.xml	10/04/2019 11:31:11	
<input type="checkbox"/>	Aaron, F   01/09/2005		B2B Open Demo School			8201010_CES_820LLLL_082.xml	15/01/2018 11:00:16	

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

**Capita One – Add Unmatched Students.**

Selected Unmatched Students will be added to the database, do you wish to Continue?

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.



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

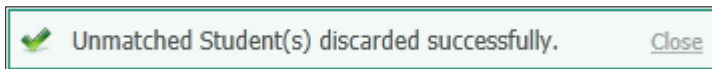
Select one or more Student records to discard these Students. If you wish to only add one Student record as new then only select the check box against the required Student record alternatively you can select the **All** check box to select all the Student records that have been retrieved.

3 Student(s)							
<input type="checkbox"/> All	Name	UPN	Base Name	NCY	Reg. Grp	File ID	File Creation Date/Time
<input checked="" type="checkbox"/>	Abbot, _____ F   01/10/2015		Green Abbey School			8204321_CES_820LLLL_190.xml	10/04/2019 11:31:11
<input checked="" type="checkbox"/>	Andrews, _____ F   13/12/1955		Green Abbey School			8204321_CES_820LLLL_190.xml	10/04/2019 11:31:11
<input type="checkbox"/>	Aaron, _____ F   01/09/2005		B2B Open Demo School			8201010_CES_820LLLL_082.xml	15/01/2018 11:00:16

Clicking the **Discard** link will display the following message:

**Capita One – Unmatched Student - Discard**  
Do you want to discard the selected student(s)?

If the **Yes** button is clicked the system will discard 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:

**8205706\_CES\_820LLLL\_053.xml**

**Data Error**

**Incoming Student :** 19/06/1999 | Male

**Reason for Error :** The Incoming Student ( (M) - 19/06/1999, KB 44) is discarded on 04/15/2019 10:24:32

**Line No :**5000

For more information on errors please refer to the topic [Error Log](#) on page 101.

## 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.

1 Student(s)								Wide View	Export
<input checked="" type="checkbox"/> All	Name	UPN	Base Name	NCY	Reg. Grp	File ID	File Creation Date/Time		
<input checked="" type="checkbox"/>	Aaron, F   01/09/2005		B2B Open Demo School			8201010_CES_820LLLL_082.xml	15/01/2018 11:00:16		

**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.

Possible Matches for: Aaron, (F) - 01/09/2005,									
<input type="checkbox"/> Also search for names which are prefixed by other characters (Contains) e.g. '%Aaron' or '%Aaron%' <input type="button" value="Yes"/> <a href="#">More Options</a>									
24 Students matching "Y" or (Aaron, Active People)"									
<input checked="" type="checkbox"/> All	Rank	Student Name	Chosen Name	Given Name	Middle Name	UPN	Student Id	DoB	Address
<input type="checkbox"/>	2	Aaron, F   01/09/2005	Aaron,					01/09/2005 1	Road, , Cambridgeshire, CB
<input type="checkbox"/>	2	Aaron, F   01/09/2005	Aaron,					01/09/2005 1	Road, , Cambridgeshire, CB

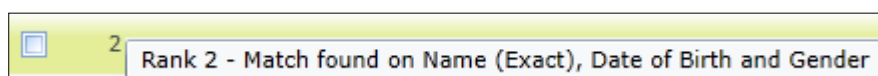
**NOTE:** The **Possible Matches for:** search window will initially only retrieve the first 200 Student records, therefore please ensure that you have scrolled through the list until the last record which will page and retrieve the next 200 Student records to ensure that you can find a possible match.

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 <b>or</b> the House Name + first five characters of the Street of the incoming Address + Postcode <b>or</b> 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 <b>Select</b> 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 clicking **More Options** and 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.

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.

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 in order 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:

**Capita One – Matching Student**

Are you sure you want to select this student for matching?

## 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.

Name	UPN	Base Name	NCY	Reg. Grp	File ID	File Creation Date/Time
Abrahams, F   12/10/1999		Green Abbey School			8204321_CES_820LLLL_190.xml	10/04/2019 11:31:11

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

Clicking the **Export** hyperlink will display a **Save As** dialog. You must define the filename and the type of file (this can be \*.csv, \*.xls or \*.htm) and the location where you wish to the file to be saved. Then click **Save**.

The details in the grid will be saved in your preferred format. For example:

	A	B	C	D	E	F	G	H	I	J	K
1	Surname	Forename	DOB	Gender	JPN	Base Name	NCY	Reg. Grp	File ID	File Creation Date/Time	File Import Date/Time
2	Abrahams		12/10/199	Female		Green Abbey School			8204321_CES_820	10/04/2019 11:31	10/04/2019 11:31
3	Adrianson		10/09/2001	Female		Green Abbey School			14678204321_CES	29/11/2014 10:50	10/04/2019 08:52

**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.

In the Matched with Conflicts screen, 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 Matched Students by pre-defined groups of Incoming Data (**Names, Address, SEN, Leavers, Exclusions, Looked After, UPN, School History, FSM, and All Others**). Each of these is followed with a count of the total number in Conflict for each Data Group.

**Data OR/AND filter:** Selecting an option enables you to further filter which records are shown based on the type of data conflict. Selecting more than one data conflict filter and then choosing **AND** displays only the records that contain conflict for all the selected filters. Choosing **OR** displays all records that contain one or more conflicts of the one of the types selected.

**Filters:** These allow you to filter the list of Matched 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 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 incoming 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:

The screenshot displays the 'Manage Data Conflicts' interface for a student named Abrahams, born 12/10/1999, female. The 'Address (1)' tab is active, showing two conflicting items:

UPN	Value	File Creation Date/Time	Reason	Accept	Discard	Reject
UPN	2	10/04/2019 11:31:11	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ULN	7	10/04/2019 11:31:11	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The 'One Record' panel on the right shows the following details:

- Given Name: Abrahams
- Family Name: Abrahams
- Date of Birth: 12/10/1999
- Gender: Female
- UPN: (highlighted in red)
- ULN: (highlighted in red)

At the bottom of the screen, there are buttons for 'Accept All Latest', 'Accept All LA Values', 'Cancel/Reset', and 'Apply'.

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 screenshot shows the 'Manage Data Conflicts' interface with the 'Address (1)' tab selected. The 'Conflicting Items' panel is empty and displays the message: "No data conflicts found for the selected data group".

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.

**One Record**

- ▶ **Identifiers**
- ▶ **Basic Details**
- ▶ **Address**
- ▼ **Ethnicity**
  - Code: WEN
  - Description: WENG - White English
  - Source: P - Provided by the Parent/Guar/PR

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

▶	<b>Expand arrow</b>
▼	<b>Collapse arrow</b>

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. The Base details will also be shown in the banner at the top of the screen.

**Incoming Record**

**File Creation Date/Time:** 23/08/2018 10:01:07 **Accept Discard Reject**

B2BSysadmin 820 6000

---

▶ **Base No:** 820 6000 **Base Name:** B2BSysadmin

**Base Contact:** *Base Contact unknown* **Telephone:** *No telephone number recorded* *Email address not known*

**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 (2)

Basic Details (4)

Address (2)

Ethnicity (0)

Exclusions (0)

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:

## Data Transfer

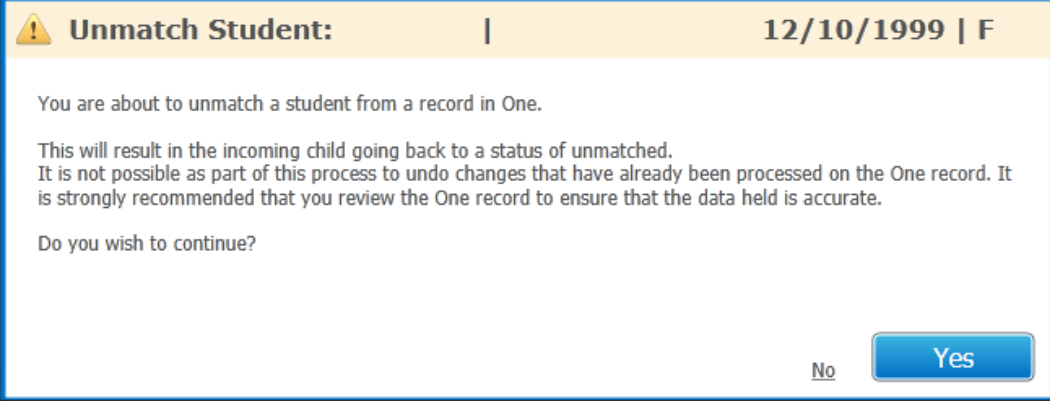
- **Accept** – selecting this will allow you to update the Student’s record with the incoming data and overwrite the data held in One. The data that you have ‘accepted’ will be removed from the relevant tab(s) from the **Manage Data Conflicts** screen.
- **Reject** – selecting this will allow you to 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.

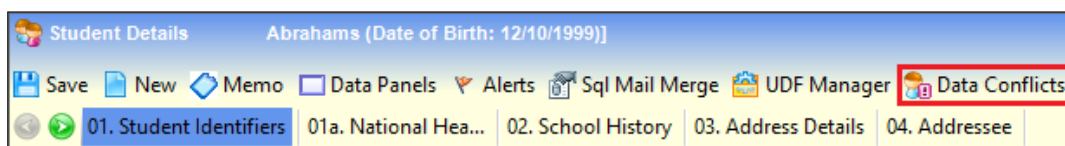
Clicking the **Unmatch Student** link will display a message before unmatching the record.



The dialog box has a yellow header with a warning icon, the text "Unmatch Student:", a vertical separator, and the date "12/10/1999 | F". The main body contains the following text: "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?" At the bottom right, there are two buttons: "No" (text) and "Yes" (blue button).

**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.

Additionally, there is a hyperlink with **v4 client | Student | <student>** that will be enabled when there are Conflicts present for this Student in **v4 online | B2B:Student** which will allow you to access the **Manage Data Conflicts** area for this Student.



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

## All Tabs

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

If there are data items held in Conflict the tab label will be coloured **RED**. When selected, the incoming data is displayed in the left panel along with the conflicting data item from the One database for comparison. The student data held in the One database is also displayed in the right panel with any conflicts shown in **RED** for that data item only. For example:

Checking the **Accept**, **Discard** or **Reject** box and clicking **Apply** will display the **Resolved Data Conflicts** pop up window. Clicking **Continue** will apply one of the following actions and remove the selected data from the Conflict area.

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

Action	Resolution
Accept	This will update the incoming value for the Student in One
Discard	This will retain the current value for the Student in One
Reject	This will retain the current value for the Student in One and will reject the incoming data. You will be prompted to enter the reason for rejection.

**NOTE:** The **Rejection Reason** you have entered as well as 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**.

When you have processed all the Conflicts for a student, the system will automatically take you back to the **Matched with Conflicts** area and the Student will be removed from the list.

## Student Identifiers

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

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



## Student Basic Details

Conflicting Items				One Record														
<p><a href="#">National Identity</a></p> <p>▼ <b>National Identity</b></p> <p>One Record OTH - Other</p> <p>Incoming Record</p> <table border="1"> <thead> <tr> <th>Value</th> <th>File Creation Date/Time</th> <th>Reason</th> <th>Accept</th> <th>Discard</th> <th>Reject</th> </tr> </thead> <tbody> <tr> <td>ANEP</td> <td>29/11/2014 10:50:59</td> <td>Invalid Code</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>				Value	File Creation Date/Time	Reason	Accept	Discard	Reject	ANEP	29/11/2014 10:50:59	Invalid Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p>► <b>Identifiers</b></p> <p>▼ <b>Basic Details</b></p> <p>Chosen Given Name:</p> <p>Given Name 2:</p> <p>Chosen Family Name: Bell</p> <p>NCY: 17</p> <p>Part Time: No</p> <p>Boarder: No</p> <p>Medical Flag: No</p> <p>Religion: -</p> <p><b>National Identity:</b> OTH - Other</p>		
Value	File Creation Date/Time	Reason	Accept	Discard	Reject													
ANEP	29/11/2014 10:50:59	Invalid Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>													

Student Basic Details comprise **Chosen Given Name, Given Name 2, Chosen Family Name, NCY, Part Time, Boarder, Medical Flag, Religion, National Identity, EAL, First Language, Home Language, Connexions/YSSA, Gifted and Talented, Former UPN, Mode of Travel and Primary Contact No.**

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

## Address

Conflicting Items																																													
<p>▼ <b>Address</b></p> <p>File Creation Date/Time: 23/08/2018 10:01:07</p> <table border="1"> <thead> <tr> <th></th> <th>Incoming Address</th> <th>Existing Address</th> </tr> </thead> <tbody> <tr> <td>Flat</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Building Number</td> <td><input type="text" value="22"/></td> <td><input type="text" value="23"/></td> </tr> <tr> <td>Building Name</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Street Name</td> <td><input type="text" value="Winchester Circle"/></td> <td><input type="text" value="Barford Avenue"/></td> </tr> <tr> <td>District / Village</td> <td><input type="text" value="Kingston"/></td> <td><input type="text"/></td> </tr> <tr> <td>Town</td> <td><input type="text" value="Milton Keynes"/></td> <td><input type="text" value="Bedford"/></td> </tr> <tr> <td>County</td> <td><input type="text"/></td> <td><input type="text" value="Bedfordshire"/></td> </tr> <tr> <td>Postcode</td> <td><input type="text" value="MK10 0BA"/></td> <td><input type="text" value="MK42 0DS"/></td> </tr> <tr> <td>UPRN</td> <td><input type="text"/></td> <td><input type="text" value="10002969343"/></td> </tr> <tr> <td>Type</td> <td><input type="text" value="Home Address"/> ▼</td> <td><input type="text" value="Type"/> ▼</td> </tr> <tr> <td>Correspondence address</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Accept</td> <td><input type="checkbox"/></td> <td>Discard <input type="checkbox"/></td> </tr> <tr> <td></td> <td>Reject <input type="checkbox"/></td> <td></td> </tr> </tbody> </table>					Incoming Address	Existing Address	Flat	<input type="text"/>	<input type="text"/>	Building Number	<input type="text" value="22"/>	<input type="text" value="23"/>	Building Name	<input type="text"/>	<input type="text"/>	Street Name	<input type="text" value="Winchester Circle"/>	<input type="text" value="Barford Avenue"/>	District / Village	<input type="text" value="Kingston"/>	<input type="text"/>	Town	<input type="text" value="Milton Keynes"/>	<input type="text" value="Bedford"/>	County	<input type="text"/>	<input type="text" value="Bedfordshire"/>	Postcode	<input type="text" value="MK10 0BA"/>	<input type="text" value="MK42 0DS"/>	UPRN	<input type="text"/>	<input type="text" value="10002969343"/>	Type	<input type="text" value="Home Address"/> ▼	<input type="text" value="Type"/> ▼	Correspondence address	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Accept	<input type="checkbox"/>	Discard <input type="checkbox"/>		Reject <input type="checkbox"/>	
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Correspondence address	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																											
Accept	<input type="checkbox"/>	Discard <input type="checkbox"/>																																											
	Reject <input type="checkbox"/>																																												

## Manually Matching an 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.

The screenshot shows the 'Address Manager' window. At the top, it displays 'Incoming Record 12, Circle, Milton Keynes, MK10'. Below this is a search bar containing 'MK10' and a 'Search' button. A link '+ Add a new address' is visible. The main area contains a table with columns: Street Address, Country, and USRN. The first row shows 'CIRCLE, MILTON KEYNES, MK10'. Below this is a table with columns: Dwelling, Telephone, Easting, Northing, UPRN, and OSAPR. Two rows are listed: '27' and '32', each with an 'Edit' link.

You can view all the Dwellings for the selected Post Code by clicking on + button next to the Street details of the Address.

Highlight the required **Dwelling** then click the **Select** button to select the Address you wish to add for the Student. You will need to select the **Corresp.** checkbox to mark the address as the correspondence address for the student (if applicable) as well as the **Type** (eg. Home Address, Guardian, School, etc). Then click the **Apply** button to add the address to the student record.

## Adding an Address

If an incoming address cannot be matched to an address in the One database it can be added as a new address.

The screenshot shows the 'Address Manager' window with a search bar containing 'MK2' and a 'Search' button. Below the search bar is a link '+ Add a new address'. A red error message box displays 'No matching records found' with a 'Close' button. Below the error message is a table with columns: Street Address, Country, and USRN.

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**, **OSAPR**, **Easting** and **Northing**.

## Data Transfer

Address Details

<input type="text" value="Flat Name"/>	<input type="text" value="Building Name"/>
<input type="text" value="30"/>	<input type="text" value="Telephone"/>
<input type="text" value="Wharf"/>	<input type="text" value="Street Name 2"/>
<input type="text" value="Barford"/>	<input type="text" value="Milton Keynes"/>
<input type="text" value="County"/>	<input type="text" value="MK2"/>
<input type="text" value="Country"/>	<input type="text" value="LA"/>
<input type="text" value="USRN"/>	<input type="text" value="UPRN"/>
<input type="text" value="OSAPR"/>	
<input type="text" value="Easting"/>	<input type="text" value="Northing"/>

[View On Map](#)

In England

Once you have added the Address you will be returned to the Conflict screen where you will need to select the **Corresp.** checkbox to mark the address as the correspondence address for the student (if applicable) as well as the **Type** (eg. Home Address, Guardian, School, etc). Then click the **Apply** button followed by **Continue** to add the address to the student record.

**NOTE:** The **Address** details that are displayed in 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

Conflicting Items	One Record																								
<p><a href="#">Ethnicity</a> <a href="#">Ethnicity Source</a></p> <p><b>▼ Ethnicity</b>            One Record <span style="color: blue;">CHK CHKC - Hong Kong Chinese</span>            Incoming Record</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Value</th> <th>File Creation Date/Time</th> <th>Reason</th> <th>Accept</th> <th>Discard</th> <th>Reject</th> </tr> </thead> <tbody> <tr> <td>WENG</td> <td>16/04/2019 08:52:18</td> <td>Conflict</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table> <p><b>▼ Ethnicity Source</b>            One Record <span style="color: blue;">No data value present in One</span>            Incoming Record</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Value</th> <th>File Creation Date/Time</th> <th>Reason</th> <th>Accept</th> <th>Discard</th> <th>Reject</th> </tr> </thead> <tbody> <tr> <td>P - Provided by the Parent/ Guar/PR</td> <td>16/04/2019 08:52:18</td> <td>Conflict</td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table>	Value	File Creation Date/Time	Reason	Accept	Discard	Reject	WENG	16/04/2019 08:52:18	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Value	File Creation Date/Time	Reason	Accept	Discard	Reject	P - Provided by the Parent/ Guar/PR	16/04/2019 08:52:18	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p><b>▶ Identifiers</b></p> <p><b>▶ Basic Details</b></p> <p><b>▶ Address</b></p> <p><b>▼ Ethnicity</b>  <span style="color: red;">Code: CHK</span>  <span style="color: red;">Description: CHKC - Hong Kong Chinese</span>  <span style="color: red;">Source: -</span></p> <p><b>▶ Exclusions</b></p> <p><b>▶ Looked after</b></p> <p><b>▶ School History</b></p>
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WENG	16/04/2019 08:52:18	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																				
Value	File Creation Date/Time	Reason	Accept	Discard	Reject																				
P - Provided by the Parent/ Guar/PR	16/04/2019 08:52:18	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																				

Student Ethnicity Details comprise **Ethnicity** and **Ethnicity Source**.

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

## Exclusions

Conflicting Items							One Record																																										
<p>▼ Exclusions</p> <p>One Record</p> <table border="1"> <thead> <tr> <th>Start Date</th> <th>Start Time</th> <th>End Date</th> <th>Reason</th> <th>Category</th> <th colspan="2">Base Name</th> </tr> </thead> <tbody> <tr> <td colspan="7">Incoming Record</td> </tr> <tr> <td colspan="7">File Creation Date/Time: 16/04/2019 08:44:14 Reason: Always Conflict</td> </tr> <tr> <th>Start Date</th> <th>Start Time</th> <th>End Date</th> <th>Reason</th> <th>Category</th> <th colspan="2">School Days</th> </tr> <tr> <td>01/04/2019</td> <td>AM</td> <td>01/04/2019</td> <td>DB</td> <td>FIXD</td> <td colspan="2">1.000000 <a href="#">Resolve</a></td> </tr> <tr> <td colspan="7">Base Name: Green Abbey School</td> </tr> </tbody> </table>							Start Date	Start Time	End Date	Reason	Category	Base Name		Incoming Record							File Creation Date/Time: 16/04/2019 08:44:14 Reason: Always Conflict							Start Date	Start Time	End Date	Reason	Category	School Days		01/04/2019	AM	01/04/2019	DB	FIXD	1.000000 <a href="#">Resolve</a>		Base Name: Green Abbey School							<p>► Identifiers</p> <p>► Basic Details</p> <p>► Address</p> <p>► Ethnicity</p> <p>▼ Exclusions</p>
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Base Name: Green Abbey School																																																	

Select the Resolve Link to display the **Resolved Data Conflicts – Exclusions** pop up window.

**Resolve Data Conflict - Exclusions**

Incoming Record

Start Date	Start Time	End Date	Reason	Category	School Days	
01/04/2019	AM	01/04/2019	DB	DB - Persistent Disrupt. E	FIXD	FIXD - Fixed Period

Base Name: Green Abbey School

One Record

Start Date	Start Time	End Date	Reason	Category	Base Name	Match

Alternative Action

Add New     Discard     Reject

[Cancel](#) [Confirm](#)

Checking the **Add New**, **Discard** or **Reject** box and clicking **Confirm** will return you to the Conflict screen. Then click the **Apply** button followed by **Continue** to add the Exclusion to the student record.

## Looked After

Conflicting Items							One Record														
<p>▼ Looked After</p> <p>One Record</p> <p>In Care : No</p> <p>Incoming Record</p> <table border="1"> <thead> <tr> <th>In Care</th> <th>File Creation Date/Time</th> <th>Reason</th> <th>Accept</th> <th>Discard</th> <th>Reject</th> <th></th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>16/04/2019 08:52:18</td> <td>Conflict</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td></td> </tr> </tbody> </table>							In Care	File Creation Date/Time	Reason	Accept	Discard	Reject		Yes	16/04/2019 08:52:18	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<p>► Identifiers</p> <p>► Basic Details</p> <p>► Address</p> <p>► Ethnicity</p> <p>► Exclusions</p> <p>▼ Looked after</p> <p>In Care: No</p>
In Care	File Creation Date/Time	Reason	Accept	Discard	Reject																
Yes	16/04/2019 08:52:18	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																

Checking the **Accept** box followed by **Apply** and then **Continue** will add a tick to the **Care Order** tickbox in v4 client | Student | 07. Supporting Details as follows:

07. Supporting Details			
Social Services	<input checked="" type="checkbox"/>	Care Order	<input checked="" type="checkbox"/>
Student Carer	<input checked="" type="checkbox"/>	PEP	<input checked="" type="checkbox"/>
Service Family	<input checked="" type="checkbox"/>	FSM Eligibility	<input checked="" type="checkbox"/>

## School History

Conflicting Items								One Record																													
<b>▼ School History</b> One Record <table border="1"> <thead> <tr> <th>Base Name</th> <th>Start Date</th> <th>End Date</th> <th>Reg.</th> <th>Dual</th> <th>Guest</th> <th>Destination</th> </tr> </thead> <tbody> <tr> <td>Bluestine School</td> <td>01/09/2018</td> <td></td> <td>Yes</td> <td>No</td> <td>No</td> <td></td> </tr> </tbody> </table> Incoming Record File Creation Date/Time: 16/04/2019 08:52:18 Reason: Cannot be Registered in more than one school. <table border="1"> <thead> <tr> <th>Base Name</th> <th>Start Date</th> <th>End Date</th> <th>Reg.</th> <th>Dual</th> <th>Guest</th> <th>Destination</th> </tr> </thead> <tbody> <tr> <td>Green Abbey School</td> <td>13/09/2018</td> <td></td> <td>Yes</td> <td>No</td> <td>No</td> <td></td> </tr> </tbody> </table>								Base Name	Start Date	End Date	Reg.	Dual	Guest	Destination	Bluestine School	01/09/2018		Yes	No	No		Base Name	Start Date	End Date	Reg.	Dual	Guest	Destination	Green Abbey School	13/09/2018		Yes	No	No		<b>▼ School History</b> Base Name: Bluestine School Start Date: 01/09/2018 End Date: Reason for Joining: Reason for Leaving: Reg: Yes Dual: No Guest: No Registration Type: MN-S Destination:	
Base Name	Start Date	End Date	Reg.	Dual	Guest	Destination																															
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Green Abbey School	13/09/2018		Yes	No	No																																

Student School History Details comprise **Base Name, Start Date, End Date, Reason for Joining, Reason for Leaving, Reg, Dual, Guest, Registration Type** and **Destination**.

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 may require additional information such as an **End Date** for the current school. For example:

One Record	Base Name	Start Date	End Date	Reason for Leaving	Registration Type	Reg.	Dual	Guest	Destination
	Bluestine School	01/09/2018	<input type="text" value="(dd/mm/yyyy)"/>		MN-S - Main reg base, no dual	Yes	No	No	

**Start Date and End Date of incoming School History overlaps with Start Date and End Date of current Registered Base. Enter new End Date/s above or the system will not apply any End Date by default** Close

Alternative Action  
 Add New  Discard

Provide any additional information required and click **Confirm**. Clicking the **Apply** button followed by **Continue** will 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 and return you to the Conflict screen. Clicking the **Apply** button followed by **Continue** will retain the current value for the Student in One and the selected data will be removed from the Conflict area.

**Note:** Students with a future School History Start Date will not be included in the transfer file until they have started their attendance at the school.

## SEN Needs

Conflicting Items	One Record																																																						
<p><a href="#">SEN Status</a> <a href="#">SEN Needs</a></p> <p>▼ <b>SEN Status</b> One Record</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Value</th> <th>Collection Date</th> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>K - SEN Support</td> <td>10/01/2018</td> <td>20/10/2014</td> <td></td> </tr> <tr> <td>A - School Action</td> <td>10/01/2018</td> <td>18/06/2008</td> <td>19/10/2014</td> </tr> </tbody> </table> <p>Incoming Record</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>File Creation Date/Time</th> <th>Accept</th> <th>Discard</th> <th>Reject</th> </tr> </thead> <tbody> <tr> <td>16/04/2019 08:52:18</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Value</th> <th>Start Date</th> <th>End Date</th> <th>Reason</th> </tr> </thead> <tbody> <tr> <td>K</td> <td>22/11/2018</td> <td></td> <td>Conflict</td> </tr> </tbody> </table> <p>▼ <b>SEN Needs</b> One Record</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>SEN Type Rank</th> <th>SEN Type</th> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>SPLD - Spl Learning Diff(Dyslexia)</td> <td>02/09/2014</td> <td></td> </tr> </tbody> </table> <p>Incoming Record</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>File Creation Date/Time</th> <th>Accept</th> <th>Discard</th> <th>Reject</th> </tr> </thead> <tbody> <tr> <td>16/04/2019 08:52:18</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Rank</th> <th>Value</th> <th>Start Date</th> <th>End Date</th> <th>Reason</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>SPLD <span style="border: 1px solid gray; padding: 2px;">(x)ia) - SPLD</span></td> <td>03/09/2014</td> <td></td> <td>Conflict</td> </tr> </tbody> </table>	Value	Collection Date	Start Date	End Date	K - SEN Support	10/01/2018	20/10/2014		A - School Action	10/01/2018	18/06/2008	19/10/2014	File Creation Date/Time	Accept	Discard	Reject	16/04/2019 08:52:18	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Value	Start Date	End Date	Reason	K	22/11/2018		Conflict	SEN Type Rank	SEN Type	Start Date	End Date	1	SPLD - Spl Learning Diff(Dyslexia)	02/09/2014		File Creation Date/Time	Accept	Discard	Reject	16/04/2019 08:52:18	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rank	Value	Start Date	End Date	Reason	1	SPLD <span style="border: 1px solid gray; padding: 2px;">(x)ia) - SPLD</span>	03/09/2014		Conflict	<p>► <b>Ethnicity</b></p> <p>► <b>Exclusions</b></p> <p>► <b>Looked after</b></p> <p>► <b>School History</b></p> <p>▼ <b>SEN Needs</b></p> <p>SEN Status: K - SEN Support Start Date: 20/10/2014      End Date:</p> <p>Date Of Change: 10/01/2018 Source: B2B:Student - 4321</p> <hr/> <p>SEN Status: A - School Action Start Date: 18/06/2008      End Date: 19/10/2014</p> <p>Date Of Change: 10/01/2018 Source: B2B:Student - 4321</p> <hr/> <p>SEN Type Rank: 1 SEN Type: SPLD - Spl Learning Diff (Dyslexia)</p> <p>Start Date: 02/09/2014      End Date:</p> <p>Date Of Change: 10/01/2018</p>
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SEN Needs comprise **SEN Stage** and **SEN Needs / Rank**.

**NOTE:** You can process the **SEN Stage** and **SEN Needs** data within the **SEN Needs** tab independently.

## Family

Conflicting Items	One Record																																
<p><a href="#">Service Family</a> <a href="#">Traveller Family</a></p> <p>▼ <b>Service Family</b> One Record</p> <p>Service Family:      Source:</p> <p>Incoming Record</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>File Creation Date/Time</th> <th>Service Family</th> <th>Source</th> <th>Reason</th> <th>Accept</th> <th>Discard</th> <th>Reject</th> </tr> </thead> <tbody> <tr> <td>16/04/2019 08:52:18</td> <td>Y</td> <td>P</td> <td>Conflict</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table> <p>▼ <b>Traveller Family</b> One Record</p> <p>Traveller Family:No      Start Date:      End Date:      Status: -</p> <p>Source: -      Site Type: -      Mobility: -</p> <p>Incoming Record</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>File Creation Date/Tim</th> <th>Start Date</th> <th>End Date</th> <th>Status</th> <th>Source</th> <th>Reason</th> <th>Accept</th> <th>Discard</th> <th>Reject</th> </tr> </thead> <tbody> <tr> <td>16/04/2019 08:52:18</td> <td>01/01/201</td> <td></td> <td>GT</td> <td>P</td> <td>Conflict</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	File Creation Date/Time	Service Family	Source	Reason	Accept	Discard	Reject	16/04/2019 08:52:18	Y	P	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	File Creation Date/Tim	Start Date	End Date	Status	Source	Reason	Accept	Discard	Reject	16/04/2019 08:52:18	01/01/201		GT	P	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<p>► <b>Exclusions</b></p> <p>► <b>Looked after</b></p> <p>► <b>School History</b></p> <p>► <b>SEN Needs</b></p> <p>▼ <b>Family</b></p> <p>Service Family: Source:</p> <hr/> <p>Traveller Family: Start Date: End Date: Status: - Source: - Site Type: - Mobility: -</p>
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Family Details comprise **Service Family** and **Source**; **Traveller Family**, **Start Date**, **End Date**, **Status**, **Source**, **Site Type** and **Mobility**.

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

## Carers

The **Carers** tab is split into two additional tabs:

- **Unmatched Carers** – this tab will contain any Carers that could not be matched to a person in One.

Conflicting Items					
Unmatched Carers (1)		Matched with Conflicts (0)			
1 Carers					
<input checked="" type="checkbox"/>	Carers Name	Base Name	File ID	File Creation Date/Time	File Import Date/Time
<input checked="" type="checkbox"/>	Abbot	Green Abbey School	8204321_CES_820LLLL_202.xml	16/04/2019 08:52:18	16/04/2019 08:52:22

Discard Match

Selecting the check box next to one or more Carer records will enable the **Discard** hyperlink and **Match** button.

Clicking the link in the **Carers Name** column will allow you to view all the incoming data for the Carer:

**Incoming Carer: Abbot**

Summary

**Carer Details:**

Title: Mr	Forename:	Middle Name:	Surname: Abbot
NI Number:	NASS Number:	DOB:	
Relationship: PAF - Father	Parental Responsibility: Yes	Contact Order: 1	

**Carer Address Details:**

Address: 6, Drive, Rapshire, MK40

**Carer Contact Details:**

Phone No	Type
074 090	Home

- **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.

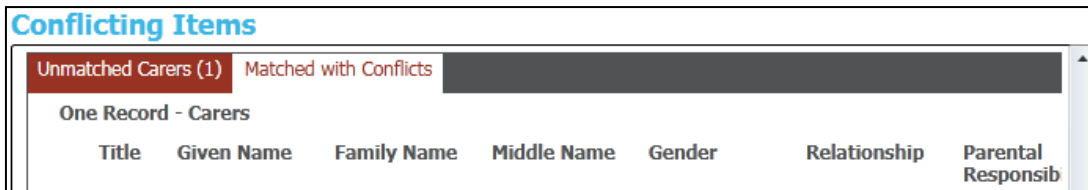
### Importing carers through Portals

The Matched with Conflicts tab has been changed for Portal Back Office users who want to import carer data through Citizen Portal (eg Early Years, Provider Portal, etc) but not B2B.

Conflicting Items							
Unmatched Carers (0)		Matched with Conflicts (3)					
Identifiers (3)		Relationships (0)		Contact Details (0)		Addresses (0)	
One Record - Carers							
Title	Given Name	Family Name	Middle Name	Gender	Relationship	Parental Responsi	

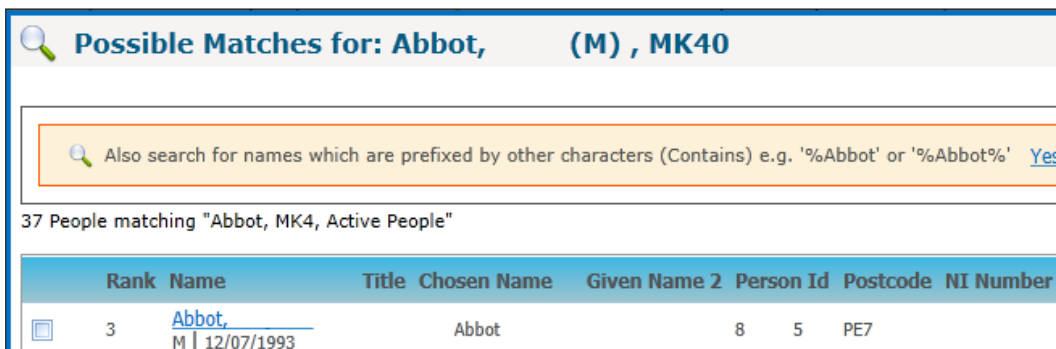
Incoming data is split into four sub-tabs: **Identifiers**, **Relationships**, **Contact Details**, and **Addresses**.

B2B users will only see the main **Matched with Conflicts** tab:



### Matching an Unmatched Carer

Select a carer from the list displayed on the **Unmatched Carers** tab and click the **Match** button. This 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. This will perform an automatic search using the surname of the Carer as well as a partial post code to determine possible matches from all **Active People** on the One database.



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

**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.

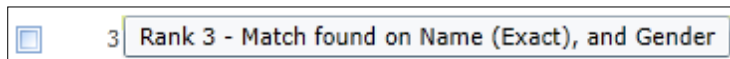
The results of the Automatic Search will be ranked to help the user determine the possible closest match to a Person in One as follows:

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 Carer retrieved in the list has been matched on.



It is possible to redefine the search by clicking **More Options** and entering additional information such as **Carer Name**, **Gender**, **Postcode** and **Base Name** as well as check boxes for **Include Name History**, **Employee Only** and **Governor Only**.

Clicking **More Options** again will allow additional search parameters to be entered such as **Person ID**, **Email**, **NI Number** and **Deceased**.

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

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.

Once the list of possible matches have been retrieved, selecting the hyperlink under the Carers Name column will display the following screen which will allow comparison of all the incoming data for the Carer against the data held for the Person that you have selected as a possible match.

Summary	
<p><b>Unmatched Carer</b></p> <p><b>Carer Details</b>  <b>Title:</b> Mr  <b>Given Name:</b>  <b>Family Name:</b> Abbot  <b>Middle Name:</b>  <b>Gender:</b> Male  <b>DOB:</b>  <b>NI Number:</b>  <b>NASS Number:</b>  <b>Relationship:</b> PAF  <b>Parental Responsibility:</b> Yes  <b>Contact Order:</b> 1</p> <p><b>Carer Address Details</b>  6, Drive, Rapshire, MK40  <b>Correspondence:</b> No      <b>Type:</b> Home Address</p> <p><b>Carer Contact Details</b>  <b>Phone No:</b>      <b>Type:</b> Home</p>	<p><b>Person in One</b></p> <p><b>Person Details</b>  <b>Title:</b>  <b>Given Name:</b>  <b>Family Name:</b> Abbot  <b>Middle Name:</b>  <b>Gender:</b> Male  <b>DOB:</b> 12/07/1993  <b>NI Number:</b>  <b>NASS Number:</b></p> <p><b>Person Address Details</b>  22 Close, Peterborough, PE7  <b>Correspondence:</b> Yes      <b>Type:</b> Home Address</p> <p><b>Person Contact Details</b></p>

To go back to the previous screen select the **Back to Carers List** hyperlink.

Select the checkbox next to the record to be matched. This will enable the **Select** button and when this is selected the following message will be displayed:

**Capita One – Match Carer**

Do you want to select this person for matching?

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

**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.

### Adding an Unmatched Carer

If a suitable match cannot be found, the incoming Carer record can be added to the One database.

From the **Possible Matches for** pop up window, click the Add New hyperlink at the bottom left of the screen

This will open the following dialog:

**Add New Person:**
**, Douglas (Male)**
✕

[◀ Back to Manage Data Conflicts](#)  
[◀ Back to Possible Matches](#)

**Person Details**

Title	<input type="text" value="Mr"/>	Person ID	<input type="text" value="Person ID"/>
Given Name	<input style="border: 2px solid yellow;" type="text"/>	Chosen Given Name	<input type="text" value="Chosen Given Name"/>
Family Name	<input type="text" value="Douglas"/>	Chosen Family Name	<input type="text" value="Chosen Family Name"/>
Given Name 2	<input type="text" value="Given Name 2"/>	Gender	<input type="text" value="Male"/>
NI Number	<input type="text" value="NI Number"/>	NASS Number	<input type="text" value="NASS Number"/>
DOB	<input type="text" value="dd/mm/yyyy"/>		
Address	<input type="text" value="10, , Milton, Cambridge, CB24"/>		

**Contact Details**

Phone No.	016 8	Type	Home
-----------	-------	------	------

Fill in any extra information as required then click **Save** to save the record to the One database.

This Carer record will then 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. 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.

### Matched with Conflicts

**Conflicting Items**
**One Record**

Unmatched Carers (0)
Matched with Conflicts (1)

**One Record - Carers**

Title	Given Name	Family Name	Middle Name	Gender	Relationship	Parental Responsibility	Contact Order
Mr		Abbot		Male	PAF	Yes	1

**Mapped Incoming Carers**

**Name:** Abbot **File Creation Date/Time:** 16/04/2019 08:52:18 **Data Conflicts:** 1

**Address (1)**

**One Record**

Incoming Record	Reason	Accept	Discard	Reject
6, , Wilverton,		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Corresp.  **Type:**

**Carers**

**Carer Details**

Title: Mr  
 Given Name:  
 Family Name: Abbot  
 Middle Name:  
 Gender: Male  
 DOB:  
 NI Number:  
 NASS Number:  
 Relationship: PAF - Father  
 Parental Responsibility: Yes  
 Contact Order: 1

**Carer Address Details**

Correspondence: No **Type:**

**Carer Contact Details**

Phone No: 074 90 **Type:** Home  
 Phone No: **Type:**  
 Phone No: **Type:**

Carers comprises **Carer Details**, **Address** and **Contact Details**.

## Carer Details

Carer Details (1)	Accept	Discard	Reject
Reason: Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Title: Mr <input type="text" value="Mr"/>			
Surname: James			
Forename:			
Middlename:			
Gender: Male			
DOB:			
NI Number:			
NASS Number:			
Relationship: PAF <input type="text" value="PAF - Father - PAF"/>			
Parental Responsibility: Yes			
Contact Order: 2			

**NOTE:** You can only process the data within the **Carer Details** section as a whole and not by individual data items.

## Address

Address (1)	Reason	Accept	Discard	Reject
One Record				
42 Way, Bedford, MK44				
Incoming Record	Reason	Accept	Discard	Reject
10, Street, Bedford, MK40	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Corresp. <input type="checkbox"/> Type: <input type="text" value="Home Address"/>				

## Manually Matching an 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.

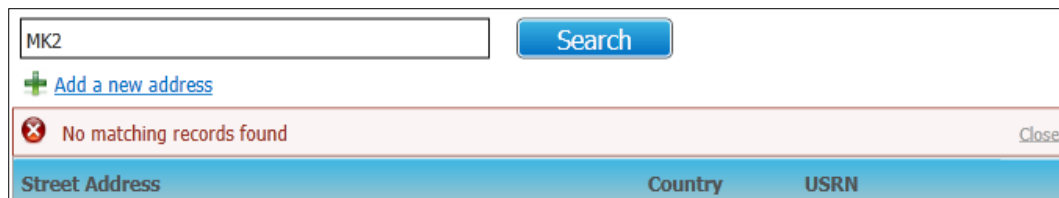
You can view all the Dwellings for the selected Post Code by clicking on + button next to the Street details of the Address.

## Data Transfer

Highlight the required **Dwelling** then click the **Select** button to select the Address you wish to add for the Student. You will need to select the **Corresp.** checkbox to mark the address as the correspondence address for the student (if applicable) as well as the **Type** (eg. Home Address, Guardian, School, etc). Then click the **Apply** button to add the address to the student record.

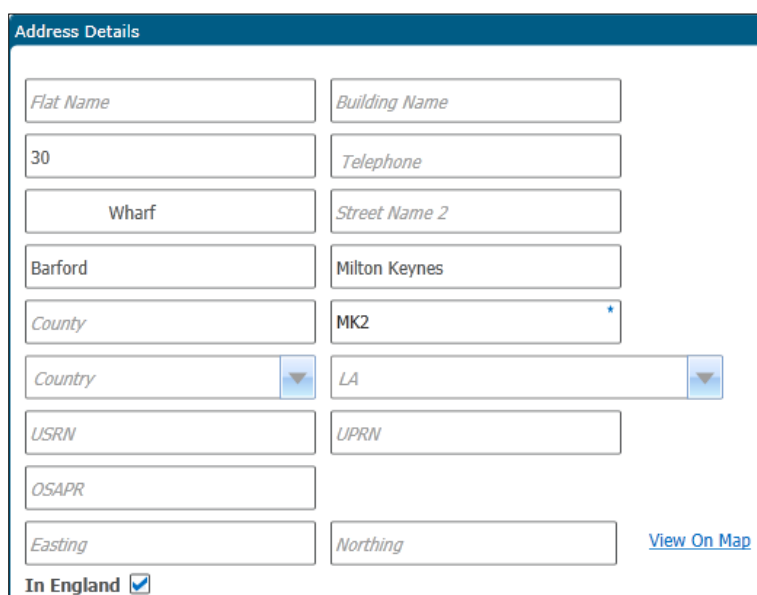
### Adding an Address

If an incoming address cannot be matched to an address in the One database it can be added as a new address.



Street Address	Country	USRN
----------------	---------	------

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**, **OSAPR**, **Easting** and **Northing**.



Flat Name	Building Name
30	Telephone
Wharf	Street Name 2
Barford	Milton Keynes
County	MK2
Country	LA
USRN	UPRN
OSAPR	
Easting	Northing
<a href="#">View On Map</a>	
In England <input checked="" type="checkbox"/>	

Once you have added the Address you will be returned to the Conflict screen where you will need to select the **Corresp.** checkbox to mark the address as the correspondence address for the student (if applicable) as well as the **Type** (eg. Home Address, Guardian, School, etc). Then click the **Apply** button followed by **Continue** to add the address to the student record.

**NOTE:** The **Address** details that are displayed in 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.

## Contact Details

Contact Details (2)						
<b>One Record</b>						
<b>Phone No.</b>	<b>Type</b>					
074 90	Home					
<b>Incoming Record</b>						
<b>Phone No.</b>	<b>Type</b>	<b>Reason</b>	<b>Accept</b>	<b>Discard</b>	<b>Reject</b>	
06 43	Mobile	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
012 45	Work	Conflict	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	


**NOTE:** You can process the **Contact Details** within the **Carers** tab independently.

**NOTE:** You can process the **Carer Details, Address and Contact Details** data within the **Carer** tab independently of each other.

## FSM

Conflicting Items					One Record		
<b>FSM</b> One Record <b>Start Date</b> <b>Review Date</b> <b>End Date</b> <b>Country of UK</b> <b>Date of Change</b> Incoming Record <b>File Creation Date/Time</b> <b>Reason</b> <b>Accept</b> <b>Discard</b> <b>Reject</b> 18/04/2019 10:01:06    No existing FSM history <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <b>Start Date</b> <b>End Date</b> <b>Country Of UK</b> 01/04/2019    20/04/2019    ENG <b>Review Date</b>					<b>FSM</b> <b>FSM History (Student)</b>		

Only the current FSM record will be imported. Any records prior to the current record will be moved to the Error Log. For example:

 **8204321\_CES\_820LLLL\_034.xml**

**Data Error**

**Incoming Student :**                      08/08/2005 | Male

**Reason for Error :** The Incoming FSM Record Start Date: 02-SEP-08 -End Date: 21-DEC-10 is before the most recent FSM History record for the Student in One and therefore will not be processed.

**Line No :8009**

## Additional Notes Regarding the Manage Data Conflicts screen

- Where the incoming data is a lookup code and the External Code is mapped to more than one Internal Code, then the system will place the incoming data into the **Manage Data Conflicts** area for the relevant tab. To process the conflicted item, select a valid code from a list of codes shown in the drop down.

SEN Needs						
One Record						
SEN Type	Rank	SEN Type	Start Date	End Date		
Incoming Record					Accept	Discard
File Creation Date/Time:			18/04/2019 10:01:06		<input type="checkbox"/>	<input type="checkbox"/>
Rank	Value	Start Date	End Date	Reason		
1	SEMH	16/04/2019		Multiple active SEN Needs		
<div style="border: 1px solid black; padding: 2px;">                     BESD - Beh, Emotional and Social Diff - SEMH                      SMEH - Soc, Em and Ment Health - SEMH                 </div>						

- Where the incoming data is a lookup code and this exists but is 'inactive', then the system will place the incoming data into the **Manage Data Conflicts** area for the relevant tab. This can be processed in the same way as any other Data Item.

SEN Needs						
One Record						
SEN Type	Rank	SEN Type	Start Date	End Date		
Incoming Record					Accept	Discard
File Creation Date/Time:			18/04/2019 11:44:06		<input type="checkbox"/>	<input type="checkbox"/>
Rank	Value	Start Date	End Date	Reason		
1	MLD	20/10/2018		SEN Needs code inactive		
<div style="border: 1px solid black; padding: 2px;">                     iculty - MLD                 </div>						

- 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.

**Reason for Error :** The Incoming SEN Needs data item BESD is invalid and therefore the Incoming SEN Needs data cannot be accepted by One for this Student

- Where the incoming Address for a Student or a Carer does not exist in One this will always be placed in Conflict. The new address can be manually added and then linked to the Student or Carer.

**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.

## 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.

Unmatched | **Matched with Conflicts** | Deleted by School | Manage Incoming Students

Filters:

[Clear Filters](#)

1 Files

<input checked="" type="checkbox"/>	All	Name	UPN	Post Code	File ID	Deleted Date/Time	Base Name
<input checked="" type="checkbox"/>		Kaur, F	13/02/1993		8204321_CES_820LLLL_212.xml	18/04/2019 12:26:00	Green Abbey School

[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.

## Manage Incoming Students

### Data Transfer | Incoming Students | Manage Incoming Students

The **Manage Incoming Students** tab will display details of any imported files where there is still unprocessed data in the **Unmatched** or **Matched with Conflicts** tabs.

Unmatched | Matched with Conflicts | Deleted by School | **Manage Incoming Students**

Filters:

[Clear Filters](#)

4 Files [Wide View](#) [Export](#)

<input checked="" type="checkbox"/>	All	File ID	File Creation Date/Time	File Import Date/Time	Base Name	Scheduled Task Cohort
<input type="checkbox"/>		8204321_CES_820LLLL_196.xml	16/04/2019 08:35:41	16/04/2019 08:35:44	Green Abbey School	Leavers
<input type="checkbox"/>		8204321_CES_820LLLL_200.xml	16/04/2019 08:44:14	16/04/2019 08:44:16	Green Abbey School	NCY
<input type="checkbox"/>		8204321_CES_820LLLL_202.xml	16/04/2019 08:52:18	16/04/2019 08:52:22	Green Abbey School	NCY
<input type="checkbox"/>		8204321_CES_820LLLL_210.xml	18/04/2019 11:44:06	18/04/2019 11:44:09	Green Abbey School	NCY



## Data Transfer

Click the **Wide View** hyperlink will allow you to see the list of the files that have been retrieved for the Base(s) that you have selected in a wide view.

Clicking the **Export** hyperlink will display a **Save As** dialog. You must define the filename and the type of file (this can be \*.csv, \*.xls or \*.htm) and the location where you wish to the file to be saved. Then click **Save**.

The details in the grid will be saved in your preferred format. For example:

	A	B	C	D
1	File ID	File Creation Date/Time	File Import Date/Time	Base Name
2	8204321_CES_820LLLL_196.xml	16/04/2019 08:35	16/04/2019 08:35	Green Abbey School
3	8204321_CES_820LLLL_200.xml	16/04/2019 08:44	16/04/2019 08:44	Green Abbey School
4	8204321_CES_820LLLL_202.xml	16/04/2019 08:52	16/04/2019 08:52	Green Abbey School
5	8204321_CES_820LLLL_210.xml	18/04/2019 11:44	18/04/2019 11:44	Green Abbey School

**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 the files that have been retrieved on **File ID**, **File Creation Date/Time**, **File Import Date/Time**, **Base Name**, **Task Cohort** and/or **Task Data Type**. This will not affect the student data displayed in the **Unmatched** and **Matched with Conflicts** tabs.

Filters

File ID [▼] File Creation Date/Time [▼] File Import Date/Time [▼] Base Name [▼]

Task Cohort [▼] Task Data Type [▼]

[Clear Filters](#)

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.

4 Files [Wide View](#) [Export](#)

<input type="checkbox"/>	File ID	File Creation Date/Time	File Import Date/Time	Base Name	Scheduled Task Cohort
<input checked="" type="checkbox"/>	8204321_CES_820LLLL_196.xml	16/04/2019 08:35:41	16/04/2019 08:35:44	Green Abbey School	Leavers
<input type="checkbox"/>	8204321_CES_820LLLL_200.xml	16/04/2019 08:44:14	16/04/2019 08:44:16	Green Abbey School	NCY
<input type="checkbox"/>	8204321_CES_820LLLL_202.xml	16/04/2019 08:52:18	16/04/2019 08:52:22	Green Abbey School	NCY
<input type="checkbox"/>	8204321_CES_820LLLL_210.xml	18/04/2019 11:44:06	18/04/2019 11:44:09	Green Abbey School	NCY

[Clear Students and Conflicts](#) [Clear Conflicts](#)

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.

**Capita One – Clear Students and Conflicts**

There are 0 students in Unmatched area and 1 students with Conflicts which have not been resolved and will be cleared down from unmatched and Conflict Management area.

Do you wish to continue?

Select **No** to cancel the action and **Yes** if you are happy for the Students for the selected files to be discarded.

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 1 students with Conflicts which have not been resolved and will be cleared down from the Conflict Management area.

Do you wish to continue?

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.

## Error Log

### Data Transfer | Error Log

The Error Log will allow you to review any Errors generated by the B2B:Student process.

Files		Other				
2 Errors <span style="float: right;"><a href="#">Wide View</a> <a href="#">Export</a></span>						
<input type="checkbox"/>	All	Base Name	Name	File ID	Error Type	File Creation Date/Time
<input type="checkbox"/>		Green Abbey School	Western, M   19/03/2000	<a href="#">8204321_CES_820LLLL_034.xml</a> Import	Data	10/01/2018 09:44:03
<input type="checkbox"/>		Green Abbey School	Western, M   19/03/2000	<a href="#">8204321_CES_820LLLL_032.xml</a> Import	Data	10/01/2018 09:23:51

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 [B2B Activity Log](#) on page 60 for further details.

You can refine the search criteria by specifying a **From Date**, **To Date**, **Base Name** or **Base Type**, either individually or in combination. 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.

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.

## Data Transfer

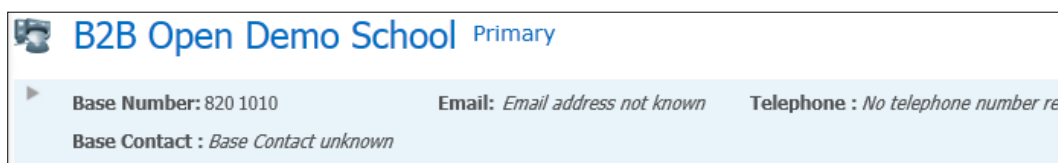
You will also be able to filter the search by **Base Selection (LA, All, or None)**, **Education Office, URN, or Clusters** if required, as well as **Active, Inactive** or **All**.

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.

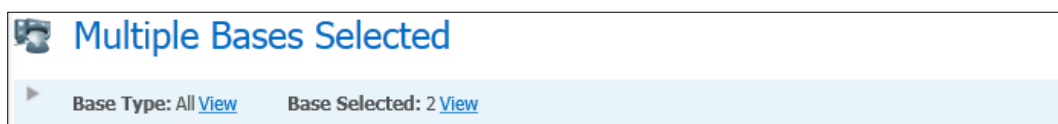
If you select a single Base from the Search Results, the system will display information about that Base in the header panel:



The system will display the **Base Name** and **Base Type** together with the following additional information about the Base:

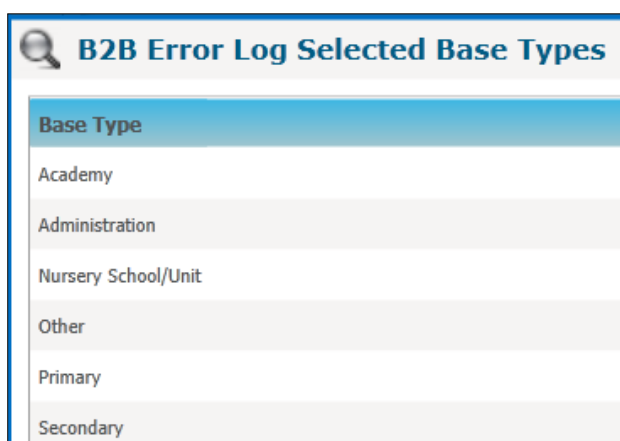
- **Base No** - LA Number and School Number
- **Email Address** – as recorded against the Principal Site of the Base in One
- **Telephone** - as recorded against the Principal Site of the Base in One
- **Base Contact** - the Person who is listed as a School Contact with the Role Code of 'Head' against the Base.

Where multiple bases are selected the header will display as follows:



The Base Name will then be shown as an additional column in the list of Errors returned.

A count of Base Types is shown along with a hyperlink to display the selected types:



A count of the Bases selected is shown along with a hyperlink to display more details of these Bases.

B2B Error Log Selected Bases			
Base Name	Email	Telephone	Base Contact
Green Abbey School	<a href="mailto:Office@GreenAbbey.bedford.gov.uk">Office@GreenAbbey.bedford.gov.uk</a>	01234 878909	
B2B Open Demo School			

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 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 able 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.

**8204321\_CES\_820LLL\_212.xml**

**Data Error**


**Incoming Student :**                      29/03/2003 | Male

**Reason for Error :** The Incoming SEN Needs data item BESD is invalid and therefore the Incoming SEN Needs data cannot be accepted by One for this Student

**Line No :**8009

## Data Transfer

For an Oracle Error, clicking on the hyperlink will take you to a standard Oracle Error modal window.

 **8204321\_CES\_820LLLL\_212.xml**

**Oracle Error**

**Incoming Student:** 29/03/2003 | Male

**Error Code:** ORA-01861

An Oracle Error with the above Error Code has been encountered when processing this file.

For further details of the error please click on the following [Link](#)

You will be able to store the details of this error for reporting to the Capita Service Desk

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.

**Oracle Error**

**Error Code :** ORA-01861

**Error Message :** ORA-01861: literal does not match format string

**Line Number :** 9008

**Error Details :** ORA-01861: literal does not match format stringORA-06512: at 'EMSMMAIN.PKG\_CCS\_IMPORT\_HOLDING\_TABLES', line 2828ORA-06512: at 'EMSMMAIN.PKG\_CCS\_IMPORT\_HOLDING\_TABLES', line 2568

**Stack Trace :** ORA-06512: at 'EMSMMAIN.PKG\_CCS\_IMPORT\_HOLDING\_TABLES', line 2828ORA-06512: at 'EMSMMAIN.PKG\_CCS\_IMPORT\_HOLDING\_TABLES', line 2568ORA-06512: at 'EMSMMAIN.PKG\_CCS\_IMPORT\_HOLDING\_TABLES', line 62 CALL STACK - ---- PL/SQL Call Stack ---- object line object handle number name00007FF643C8B878 399 package body EMSMAIN.PKG\_CCS\_DATA\_IMPORT\_UTILITY.F\_INSERT\_ERROR\_V400007FF643C8B878 417 package body EMSMAIN.PKG\_CCS\_DATA\_IMPORT\_UTILITY.F\_WRITE\_ERROR\_V400007FF636E93C60 69 package body EMSMAIN.PKG\_CCS\_IMPORT\_HOLDING\_TABLES.SP\_LOADXML00007FF636E97F08 1 anonymous block

**Cause :** Literals in the input must be the same length as literals in the format string (with the exception of leading whitespace). If the 'FX' modifier has been toggled on, the literal must match exactly, with no extra whitespace.

**Action :** Correct the format string to match the literal.

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.


 [Delete](#)  [Delete all entries for selected file](#)

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:

### Capita One – Delete Error log entries

Are you sure you want to delete the selected Error Log entries?

Clicking Yes will display the message notifying you that the Error Log entries you have selected have been deleted successfully.

 Error Log Entries deleted successfully. [Close](#)

Alternatively, selecting one entry on the Error Log will enable the **Delete all entries for selected file** hyperlink.

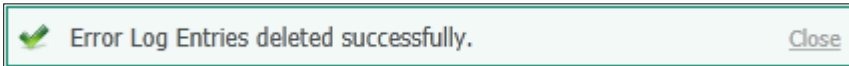


Upon clicking of this button, the system will ask you whether you wish to continue with the deletion:

**Capita One – Delete Error log entries**

This will delete all entries for the file 8204321\_CES\_820LLL\_032.xml. Do you wish to continue?

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** hyperlink will display a **Save As** dialog. You must define the filename and the type of file (this can be \*.csv, \*.xls or \*.htm) and the location where you wish to the file to be saved. Then click **Save**.

The details in the grid will be saved in your preferred format. For example:

	A	B	C	D	E	F	G	H	I	J
1	Base Name	Surname	Forename	DOB	Gender	File ID	Error Type	File Creation Date/Time	Date Logged	Error ID
2	Green Abbey School	Young		29/06/2000	Female	8204321_CES_820	Data	10/01/2018 09:23	10/01/2018 09:33	1651

**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.

## Export Job Progress

### Data Transfer | 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.

**Export Job Progress**

Search: green

School Number: [Empty]

Base Type:  All

Filters:  File Created  Sent to School  Acknowledged by School

1 Jobs

All	File Name	Date Created	Status	Number of Students	Transferred Date
<input type="checkbox"/>	6	10/04/2019 11:46:13	Acknowledged	1	10/04/2019 11:46:13

Wide View

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

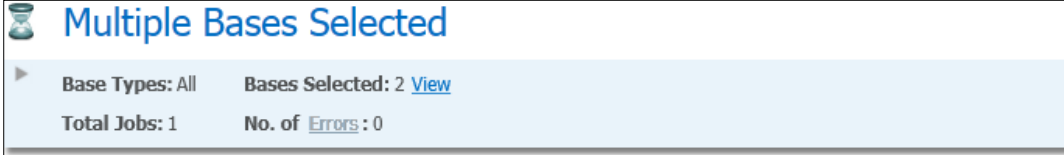
## Data Transfer

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



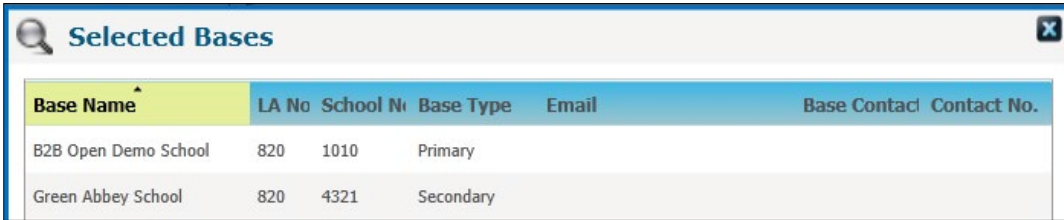
The screenshot shows a header for 'Green Abbey School' with the type 'Secondary'. Below the school name, there is a 'Base No: 820 4321', an email address 'Office@GreenAbbey.bedford.gov.uk', and 'CT Region'. At the bottom of the header, it displays 'Total Jobs: 1' and 'No. of Errors: 0'.

If more than one school is selected, the header of the school displays as follows:



The screenshot shows a header for 'Multiple Bases Selected'. It displays 'Base Types: All', 'Bases Selected: 2' with a 'View' link, and 'Total Jobs: 1' and 'No. of Errors: 0'.

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**, **Base Type**, **Email**, **Base Contact** and **Contact No.**



The screenshot shows a pop-up window titled 'Selected Bases' with a search icon and a close button. It contains a table with the following data:

Base Name	LA No	School No	Base Type	Email	Base Contact	Contact No.
B2B Open Demo School	820	1010	Primary			
Green Abbey School	820	4321	Secondary			

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

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

If a school has not requested to import the data, the **Jobs** column on the **Search** area 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.
- **ACKNOWLEDGED** - 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 Scheduled Task(s) for exporting data are run. The data will then be stored in these tables until the school has successfully imported this data which is denoted by **Acknowledged** in the **Status** column.

## Scheduled Tasks

### Data Transfer | 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 107  
[Creating a B2B:Student scheduled task](#) on page 112

## 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 (<https://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 and setting up SIMS Services Manager; SIMS automatically notifies the One system that the tasks are ready for migration, and then the LA can commence 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.

**3 B2B:Student Properties**

B2B:Student Enable Change Tracking  Lockdown Tasks To School Use Only

- Create new scheduled tasks, which the school controls by default.

Refresh Create task Import Export LA School Task log(s) Task success S Task pending P



## Data Transfer

Queued	Task name	Active	Cohort	Data type	Next run	Last run	Last run status
	Green Abbey Changes		NCY	Changed Data	10/04/2019 14:25:00		

- Request the LA to return control to the school for specific B2B:Scheduled tasks.

**Data Details**

Export task

Active    Owner : LA

LA

School

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 most recent B2B Student Service package can then be installed and activated and the school added to the Schools tab.

SIMS Services Manager					Home	Schools	Logs	Settings	About
<a href="#">Manage Packages</a>									
Name	Version	Status	Type	Actions					
B2B Student Service	3.67.0.1	Started	SimsService	<input type="checkbox"/> ON					

SIMS Services Manager					Home	Schools	Logs	Settings	About
Search: <input type="text"/>									
<a href="#">+ Add School</a>									
School Name	Server Name	Database Name	Status	Actions					
Green Abbey	VMW2K8R2\SIMS	EngGA							
10 records per page		Showing 1 to 1 of 1 entries			← Previous <span style="border: 1px solid black; padding: 2px;">1</span> Next →				

- 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 by clicking **Edit** in the banner of the selected Base and clicking the following:

[Migrate B2B Scheduled Tasks](#)

- 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.


Queued	Base Name	Scheduled Task Name	Data Flow	Status	Owner	Scheduler Settings	Cohort	Data Type
✘	<a href="#">B2B Open Demo</a>	<a href="#">Changes Task</a>	Export	Active	LA	<a href="#">View</a>	NCY	Changed Data
✔	<a href="#">Green Abbey</a>	<a href="#">Attainment</a>	Export	Active	LA	<a href="#">View</a>		Attainment Data
✔	<a href="#">Green Abbey</a>	<a href="#">Changes</a>	Export	Active	LA	<a href="#">View</a>	NCY	Changed Data
✔	<a href="#">Green Abbey</a>	<a href="#">Export task</a>	Import	Active	LA	<a href="#">View</a>	NCY	Changed Data
✔	<a href="#">Green Abbey</a>	<a href="#">Snapshot</a>	Export	Active	LA	<a href="#">View</a>	NCY	Snapshot Data
✔	<a href="#">Green Abbey</a>	<a href="#">Green Abbey Changes</a>	Export	Active	School	<a href="#">View</a>	NCY	Changed Data

## Verifying a School is Ready for Migration

A school's migration status can be viewed in the Bases module of One v4 Online.

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.

 **Applegreen School** 820 - 4401 [Edit Base](#)

---

► Website URL: Base Type: Academy Control: Academy

Official Base Name (if diff.): [View Map](#)

Active: Yes [Delete Base GIS catchment](#)

**Migration Status** : ready to migrate scheduled tasks

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

If the Base has fulfilled the pre-requisites and is ready to migrate, the **Migration Status** is "Ready to migrate scheduled tasks". Otherwise, the status is "Not ready to migrate scheduled tasks".

## 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** and click **Edit Base** in the banner to display the following:

3. Click the **Migrate B2B Scheduled Tasks** button to display a confirmation dialog.
4. 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 117.

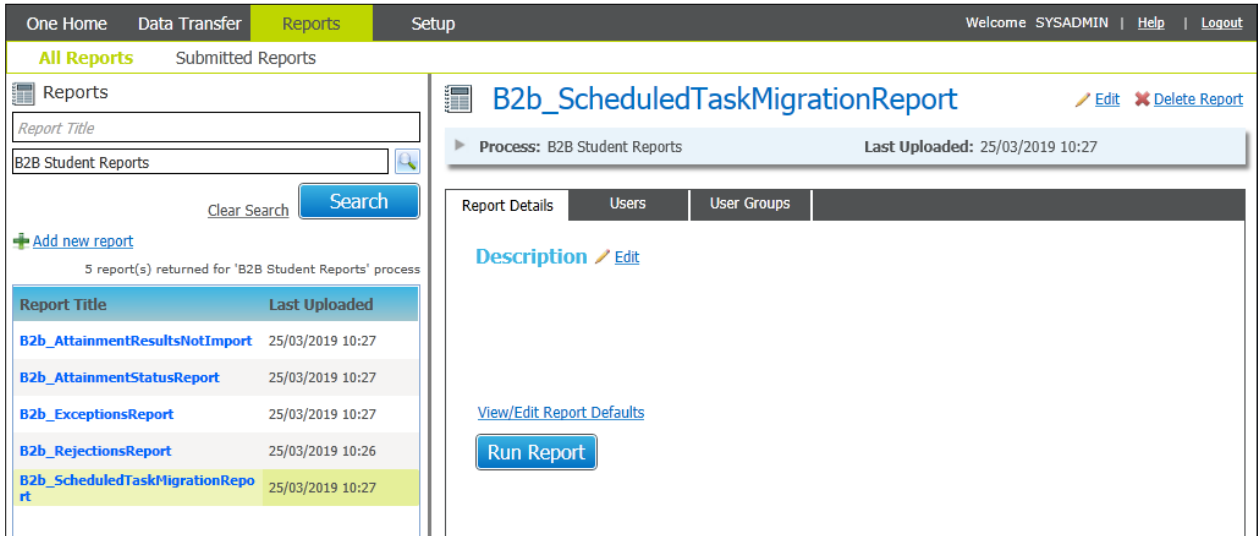
## Viewing the migration report

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:

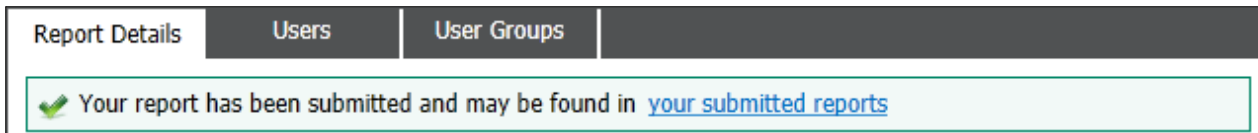
Status	Description
Scheduled tasks migrated	The scheduled tasks have been migrated from SIMS to One.
Ready to migrate	The school/base has updated to the SIMS Autumn 2015 Release (7.166) and they have SIMS Service Manager (SSM) installed and configured.
Pending migration completion	The school has updated 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:

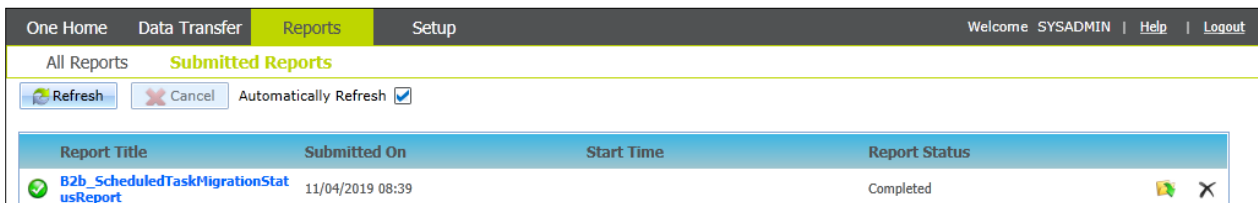
1. In One v4 Online, select **Reports | All Reports** to display a list of available reports.



2. 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.



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>				
<b>Scheduled tasks migrated</b>		<b>2 school(s)</b>		
<b>Base name</b>	<b>Base type</b>	<b>School no.</b>	<b>Migration completion date</b>	
Archana Base	AT	6666	18/09/2015 11:17:58	
Sameers B2B base - 1313	SEC	1313		
<b>Ready to migrate</b>		<b>1 school(s)</b>		
<b>Base name</b>	<b>Base type</b>	<b>School no.</b>	<b>Last migration check from sims</b>	
Cooper Base	INF	5001	24/08/2015 15:22:38	
<b>Pending migration completion</b>		<b>2 school(s)</b>		
<b>Base name</b>	<b>Base type</b>	<b>School no.</b>	<b>Initiated on</b>	<b>Last migration check from sims</b>
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
<b>Not ready to migrate</b>		<b>44 school(s)</b>		
<b>Base name</b>	<b>Base type</b>	<b>School no.</b>		
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 either to a school **from** the LA, or from a school **to** the LA.

Depending on which scheduled task is run, only data that has been changed since the posting of the last file is transferred. If all data is required then a full or Snapshot scheduled task can be run. 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
  - Attendance Changed Data (SIMS Primary)
- 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:

- NCY – students within the specified NCY (multiple or All NCYs can also be selected)
- LAC – students 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 sent in a non-leavers task, then they will not appear as in leaver in a leaver cohort.

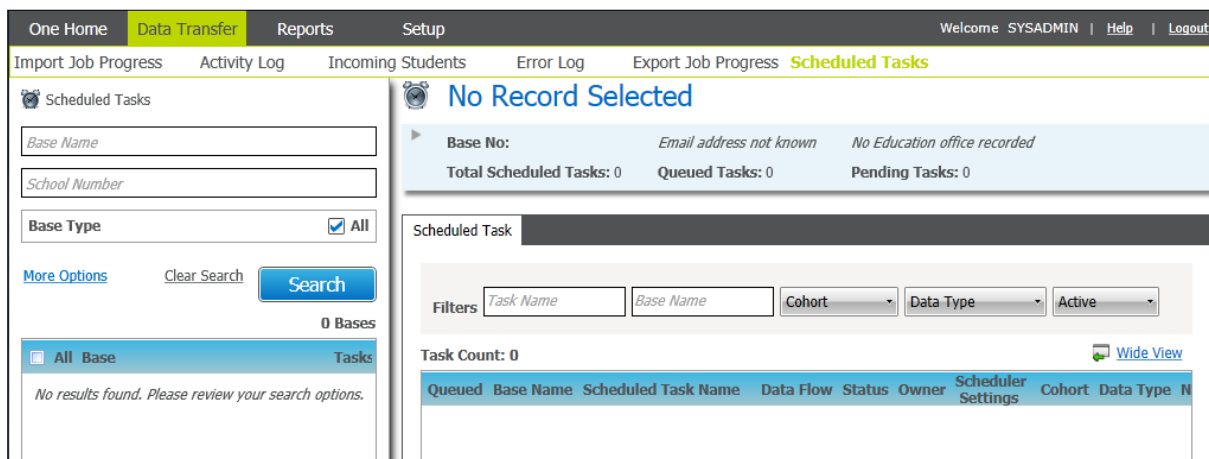
Where Attendance Data has been selected, an additional Month Filter becomes available with options from 1 month to 13 months. It is recommended that higher month values are only run occasionally as this could import large amounts of data.

**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.

When exporting data to the school, you can only select Changed Data for the group type of NCY.

To create a B2B:Student scheduled task

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



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

Task Count: 7 [Wide View](#)

Queued	Base Name	Scheduled Task Name	Data Flow	Status	Owner	Scheduler Settings	Cohort	Data
<input checked="" type="checkbox"/>	<a href="#">Green Abbey</a>	<a href="#">Attainment</a>	Export	Active	LA	<a href="#">View</a>		Attain
<input checked="" type="checkbox"/>	<a href="#">Green Abbey</a>	<a href="#">Changes</a>	Export	Active	LA	<a href="#">View</a>	NCY	Chang
<input checked="" type="checkbox"/>	<a href="#">Green Abbey</a>	<a href="#">Export task</a>	Import	Active	LA	<a href="#">View</a>	NCY	Chang
<input checked="" type="checkbox"/>	<a href="#">Green Abbey</a>	<a href="#">Snapshot</a>	Export	Active	LA	<a href="#">View</a>	NCY	Snaps


If creating a scheduled task that encompasses multiple bases then selected all bases required before clicking **Display Scheduled Tasks**.

## Data Transfer

Task Count: 10 Wide View

Queued	Base Name	Scheduled Task Name	Data Flow	Status	Owner	Scheduler Settings	Cohort	Da
✓	<a href="#">Green Abbey</a>	<a href="#">Attainment</a>	Export	Active	LA	<a href="#">View</a>		Att
✗	<a href="#">B2B Open Demo</a>	<a href="#">Changes Task</a>	Export	Active	LA	<a href="#">View</a>	NCY	Cha


The heading will change depending on whether single or multiple bases are selected.

 **Green Abbey School** Secondary

---

▶ **Base No:** 820 4321      [Office@GreenAbbey.bedford.gov.uk](mailto:Office@GreenAbbey.bedford.gov.uk)      CT Region

**Total Scheduled Tasks:** 7      **Queued Tasks:** 7      **Pending Tasks:** 0

 **Multiple Bases Selected**

---

▶ **Base Types:** All      **Bases Selected:** 2 [View](#)

**Total Scheduled Tasks:** 10      **Queued Tasks:** 7      **Pending Tasks:** 3

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

Task Details    **Task Scheduler**

---

Active    Owned by LA

**Data Details**

[Transfer Details](#)

**Transfer Type:**     Export from School  
 Import into School

[Data Filter Details](#)

- Enter a **Task Name**.
- Select the required **Transfer Type**.

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

- If you selected **Export from School**, then you must select the type of data you want to transfer:
  - In the **Data Filter Details** section, select the type of data you want the task to exchange.

[Data Filter Details](#)

- Attainment Data
- Attendance Data
- Changed Data
- Snapshot Data

Depending on the selected data type different, secondary data filters are enabled. For more information on data options, see the introduction of this section.

- Select the additional options required to export the required data. For example:

- c. Select the required student cohort. For multiple base selections, only those NCYs shared by all bases in the selection will be available.
- d. If you select **Import into School** then the **Data Filter Details** are greyed out.

- 8. Select the **Task Scheduler** tab to display the scheduling options.

- 9. To configure the schedule for the task:
  - a. Select a **Start** date and time for the task to run.



## Data Transfer

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.

**Scheduled Task Pattern**

Once  Weekly  Monthly

Days  All

Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

- **Monthly** – the task will run once a day at the time specified in the **Start** field on the selected day for each selected month.

**Scheduled Task Pattern**

Once  Weekly  Monthly

On  ▼

January  February  March  April  May  June

July  August  September  October  November  December

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 example, it will run once every hour for 8 hours. The scheduled task will expire (ie. no longer run) on 12/04/2019 at 10:00:00.

**Advanced Settings**

Runs every  Hours ▼ for a duration of  Hours ▼

Expire  at

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

### Capita One – Scheduled Task - Save

Scheduled task has been successfully saved for the selected bases(s).

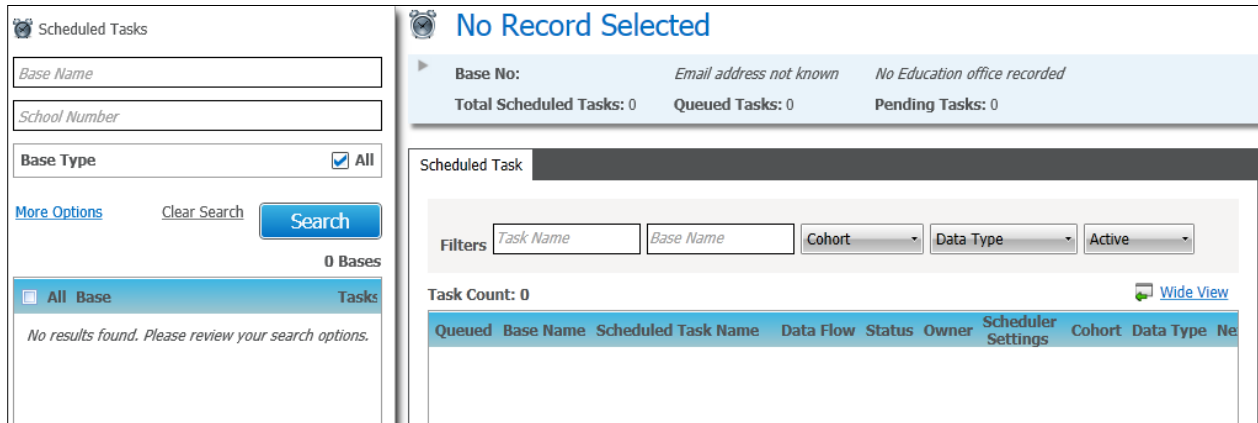
11. Click the **OK** button to close the dialog and display the list of tasks associated with the selected bases.

## 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**.



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.

**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.



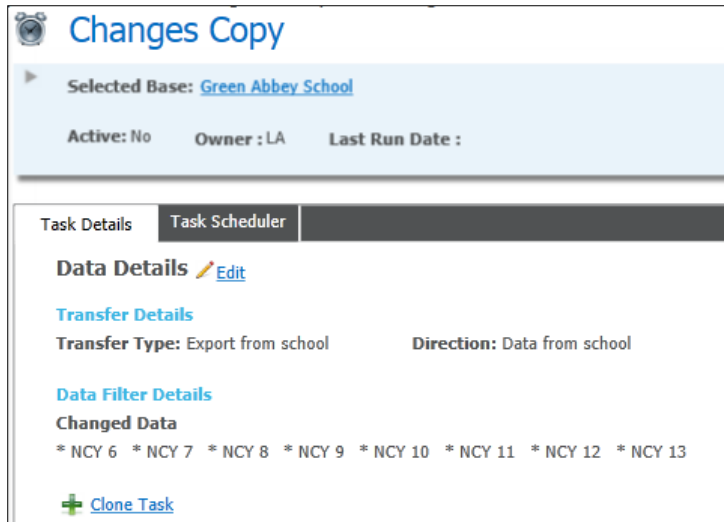
4. In the list of bases, select the check box for each base you want to view then click the **Display Scheduled Tasks** button. The tasks associated with the selected bases are displayed.

**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.

The screenshot shows the 'Scheduled Task' details page. It includes filter dropdowns and a 'Task Count: 5' indicator. Below is a table of tasks:

Queued	Base Name	Scheduled Task Name	Data Flow	Status	Owner	Scheduler Settings	Cohort	Data Type	Next Run Date	Last Successful Run	Last Run Status
✓	Green Abbey	Attainment	Export	Active	School	<a href="#">View</a>		Attainment Data	11/04/2019 15:45:00	11/04/2019 11:20:31	<span style="color: green;">S</span>
✓	Green Abbey	Changes	Export	Active	School	<a href="#">View</a>	NCY	Changed Data		16/01/2019 10:11:06	<span style="color: green;">S</span>
✓	Green Abbey	attendance	Export	Active	School	<a href="#">View</a>	NCY	Attendance Data		16/01/2019 14:48:28	<span style="color: green;">S</span>
✓	Green Abbey	Snapshot	Export	Active	School	<a href="#">View</a>	NCY	Snapshot Data		10/01/2019 10:13:16	<span style="color: green;">S</span>
✓	Green Abbey	Leavers	Export	Active	School	<a href="#">View</a>		Leavers Snapshot Data		14/01/2019 15:02:03	<span style="color: green;">S</span>

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



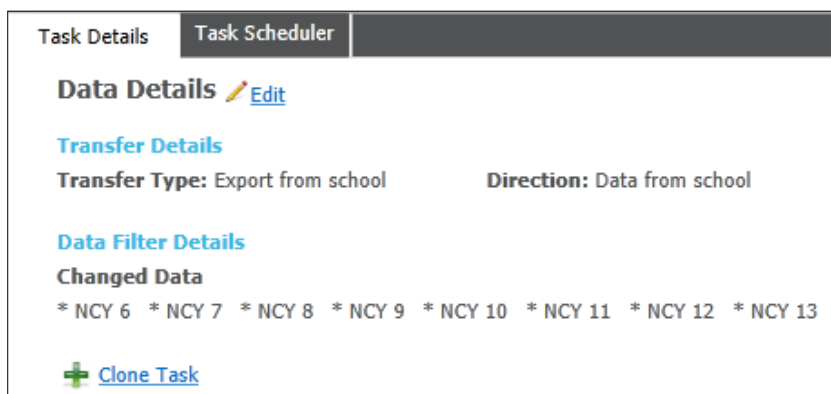
## Assigning a Scheduled Task Ownership

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. When a scheduled task is created in the B2B Portal (accessed by clicking the **Student Scheduled Tasks** button in **SIMS | Routines | Data Exchange | Manage Tasks**), then by default the owner is the school.

**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.

To assign task ownership to a Base:

1. Open the required scheduled task. For more information see [Viewing Scheduled Tasks](#) on page 117



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

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

- 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.

To make a scheduled task inactive:

- Open the required scheduled task. For more information, see [Viewing Scheduled Tasks](#) on page 117

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

## Data Transfer

Task Details | **Task Scheduler**

### Data Details

Changes Copy

Active    Owner : LA

### Transfer Details

Transfer Type:  Export from School  
 Import into School

### Data Filter Details

Changed Data

NCY

[+ Clone Task](#)

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

# 06 | Reports

## All Reports

### Reports | All Reports

This screen will allow you to see the reports that exist for B2B:Student:

- B2b\_ExceptionsReport
- B2b\_RejectionsReport
- B2b\_ScheduledTaskMigrationReport
- B2b\_AttainmentResultNotImport
- B2b\_AttainmentStatusReport

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.

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.

2 report(s) returned for title 'attain' and 'B2B Student Reports' process

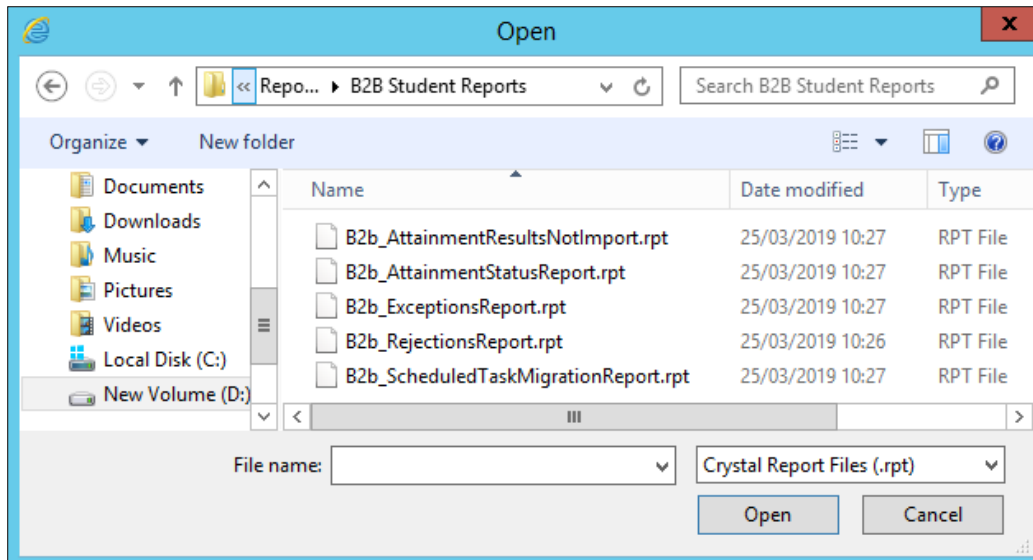
Report Title	Last Uploaded
B2b_AttainmentResultsNotImport	25/03/2019 10:27
B2b_AttainmentStatusReport	25/03/2019 10:27

It is possible for you add or upload your own B2B:Student Reports by selecting the **Add new report** link.

## Reports

Define an appropriate **Report Title** and then click the **Upload new report** link to select the report to be added.

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.

6 report(s) returned for 'B2B Student Reports' process

Report Title	Last Uploaded
<a href="#">B2b_AttainmentResultsNotImport</a>	25/03/2019 10:27
<a href="#">B2b_AttainmentStatusReport</a>	25/03/2019 10:27
<a href="#">B2b_ExceptionsReport</a>	25/03/2019 10:27
<a href="#">B2b_RejectionsReport</a>	25/03/2019 10:26
<a href="#">B2b_ScheduledTaskMigrationReport</a>	25/03/2019 10:27
<a href="#">Rejection Report II</a>	23/04/2019 08:36

## Exceptions Report

To run the Exceptions Report, you need to do the following:

1. Click the **Run Report** button
2. Select the date to include data from in the **Imports Since** field.



Parameter Name	Parameter Value
Imports Since	Enter Date: 23/03/2019

3. Select the Base(s) to include in the **BaseIDList** either by **selecting a custom value** or by clicking the magnifying glass to display the **Base Search** pop up window. Bases can be searched by **Base Name, School Number, Base Types, Base Selection, Assessment Stage, Clusters** or **URN**. Tick the **B2B Student Base** box to search for B2B:Student Bases only.
4. Click the checkbox to select one or more Bases then click Select.

<b>BaseIDList</b>	<b>Applegreen School, Green Abbey School</b>
-------------------	--

5. Select one of the following for the **Report Type** field:

<b>Report Type</b>	<p><b>Enter Report Type:</b></p> <div style="border: 1px solid #ccc; padding: 2px;"> <input type="text"/> </div> <ul style="list-style-type: none"> <li>Unmatched Student Data</li> <li>Matched Student Conflicts</li> <li style="background-color: #fff9c4;">Matched Student Address Conflicts</li> </ul>
--------------------	--

- **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.

Report Parameters <span style="float: right;">B2b_ExceptionsReport</span>	
Parameter Name	Parameter Value
Imports Since	23/03/2019
BaseIDList	Applegreen School, Green Abbey School
Report Type	Matched Student Conflicts

6. Click the **Submit Report** button to run the report. Click **your submitted reports** to view a list of submitted reports.

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

Once completed, reports can be accessed in the **Submitted Reports** area.

Report Title	Submitted On	Start Time	Report Status
<b>B2b_ExceptionsReport</b>	23/04/2019 09:01		Completed

Click on the folder icon to open the report.





**CAPITA** | **one** **Exceptions report**  
**Matched Student Conflicts** LA: 820 Bedfordshire 820  
 Report Generated: 23/04/2019 9:07  
 Imports Since: 23/03/2019  
 Base(s): Applegreen School, Green Abbey School

**Green Abbey School - 10 Student(s)**

UPN: Name: Grey, Gender: M DOB: 09/09/2002

Active Record in One Conflicts: School Value / One Value

Active	A&T	CIE	G&B	SEN	Transport	Leaver	Import Date	NCY	SEN	Ethnicity	In Care
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16/04/2019 08:52	-	-	WIRT/WENG	-

To redefine the data to be included in the Exception Report, select the **View/Edit Report Defaults** link. For further information on **Report Defaults** see [Exceptions Report](#) on page 42

## Rejections Report

To run the Rejections Report, you need to do the following:

1. Click the **Run Report** button.
2. Select a **From** and **To** date to include data from in the **Date** field.

**Report Parameters** B2b\_RejectionsReport

Parameter Name	Parameter Value
Date	Enter Date: From: 01/04/2019 To: 23/04/2019

3. Select the Base(s) to include in the **BaseIDList** either by **selecting a custom value** or by clicking the magnifying glass to display the **Base Search** pop up window. Bases can be searched by **Base Name**, **School Number**, **Base Types**, **Base Selection**, **Assessment Stage**, **Clusters** or **URN**. Tick the **B2B Student Base** box to search for B2B:Student Bases only.

Click the checkbox to select one or more Bases then click **Select**.

<b>BaseIDList</b>	Applegreen School, Green Abbey School
-------------------	---------------------------------------

4. Select one of the following for the **Rejection Source** field:

RejectionSource	Enter Rejection Source:
	<input type="text"/> All Auto Rejection Conflict Rejection

- **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

5. Select the information for the **Rejection Type**.

**RejectionType**

**Enter RejectionType:**

**Available Values**

**Selected Values**

Rejection

Rejection Change

Rejection Rejection Change

>>

<<

>

<

Parameter Name	Parameter Value
<b>Date</b>	From 01/04/2019 To 23/04/2019
<b>BaseIDList</b>	Applegreen School, Green Abbey School
<b>RejectionSource</b>	All
<b>RejectionType</b>	Rejection,Rejection Change,Rejection Rejection Change

6. Click the **Submit Report** button to run the report. Click **your submitted reports** to view a list of submitted reports.

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

Once completed, reports can be accessed in the **Submitted Reports** area.

Report Title	Submitted On	Start Time	Report Status
✔ <a href="#">B2b_RejectionsReport</a>	23/04/2019 09:01		Completed

Click on the folder icon to open the report.



## Rejections report

LA: 820 Bedfordshire 97

Report Generated: 07/06/2019 9:56

Base(s): B2BSysadmin

Reporting Period: From: 01/02/2018 to 07/06/2019

**B2BSysadmin - 2 Student(s)**

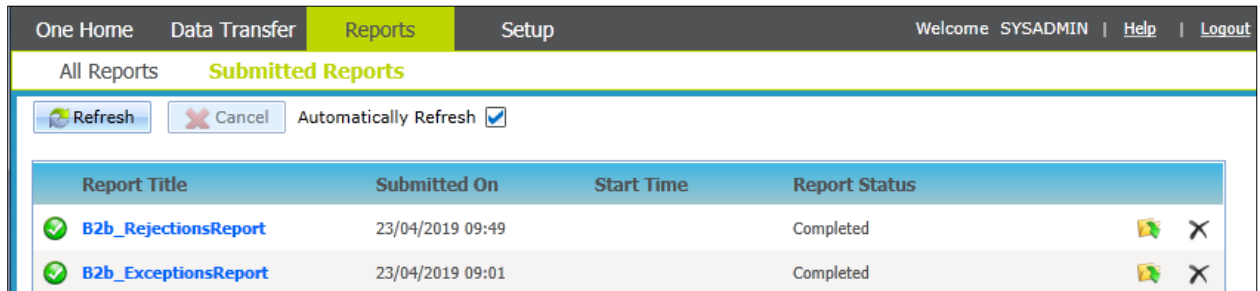
UPN:	Name:	Gender:	DOB:	Matched:
Rejection Date:	Type:	Item:	Incoming Value:	ONE Value:
<b>STUDENT ETHNICITY</b>				
04/06/2019 10:15:46 R	ETHNIC SOURCE	O	C Incorrect source - please select correct code	

To redefine the data to be included in the Exception Report, select the **View/Edit Report Defaults** link. For further information on **Report Defaults** [Rejections Report](#) on page 41

# Submitted Reports

## Reports | Submitted Reports

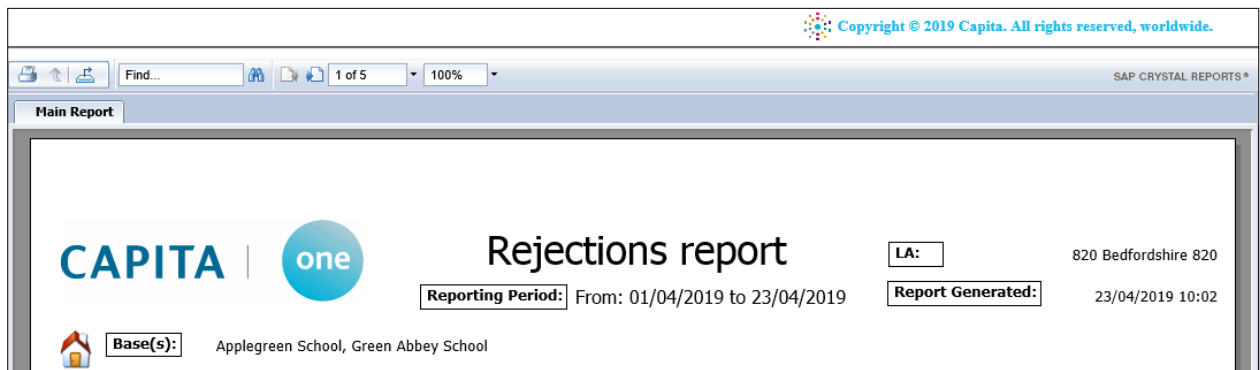
This area will allow you to view any Exceptions and Rejections that you have run.



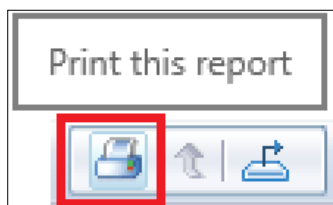
Clicking the **Refresh** button refreshes the list of submitted reports.

Selecting the **Automatically Refresh** check box will continuously update the list of submitted reports.

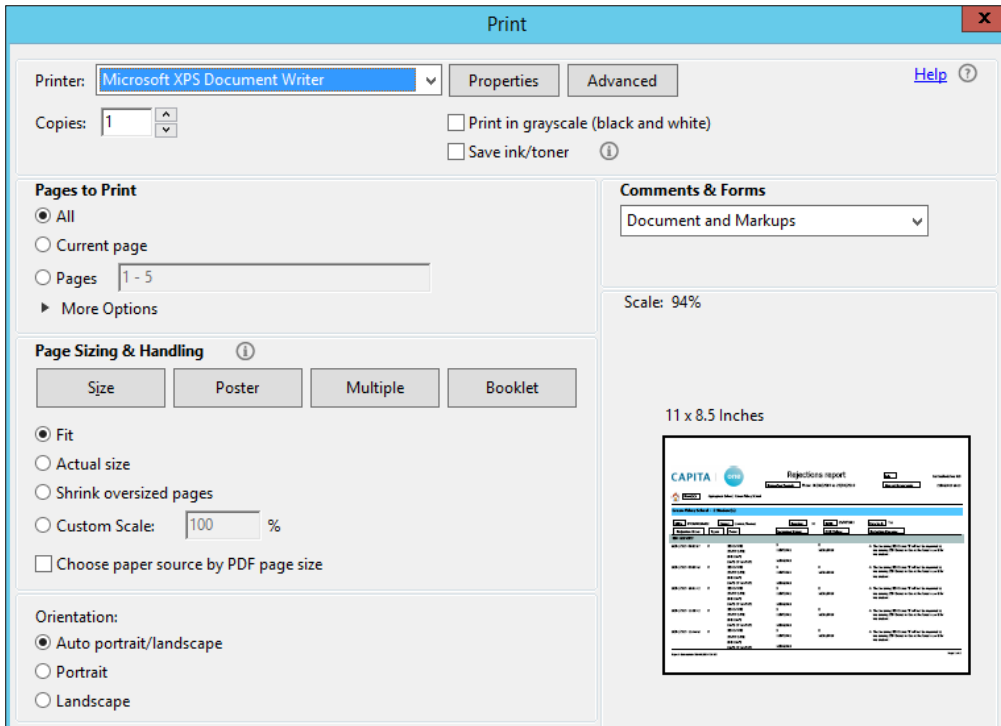
Click on the folder icon to open the report.



To print the report click the **Print** button in the top left corner.



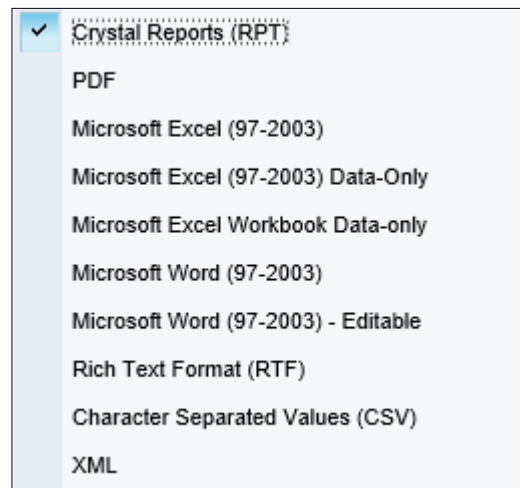
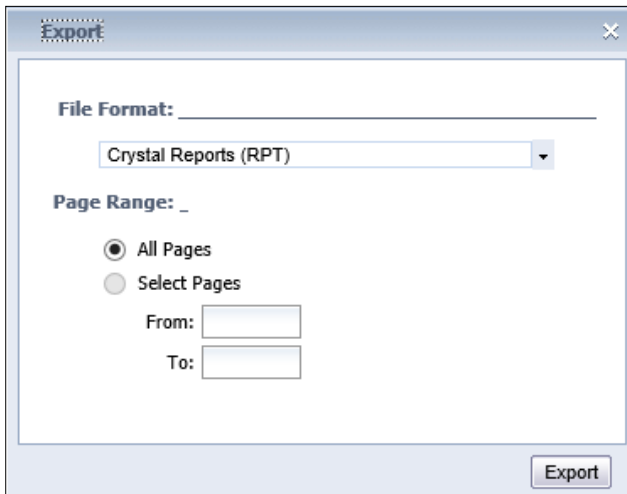
Select a printer from the list and set the defaults as appropriate, then click **Print**.



To export the report click the **Export** button in the top left corner.



This opens the **Export** dialog allowing you to select the file format for the report file output as well as the number of pages.



Some reports will have a Group Tree option.

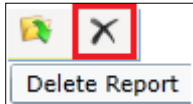


## Reports

Clicking the **double arrows** << collapses the side panel, making the report panel full screen.

Clicking the Group Tree icon  will expand the Group Tree.

To Delete a Report: Click the **Delete Report** icon shown on the right side of the **Submitted Reports** screen. 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 | 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 21.
- 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 8.

The screenshot shows a configuration window for the CCS Enterprise Integration Service. The title bar indicates the path 'C:\Program Files \CCS Enterprise Integration Service'. The window contains a menu bar with 'Save', 'New', 'Suggest Defaults For Empty Items', and 'Restart Service.'. Below the menu is a section titled '4. Application Server Settings'. This section contains several input fields: 'Application Server URL' with the value 'https:// /CCSApplicationServer', 'Username' with the value 'sysadmin', 'Password' which is masked with dots, 'Portal Update Interval (Minutes)' with the value '2', and 'Max parallel tasks in bulk processing' with the value '2'.

- Set the default import and suspense directories. For more information, see [Defining Defaults for Attainment Import](#) on page 46

**Defaults for attainment Import**

File location can be changed on individual attainment tasks

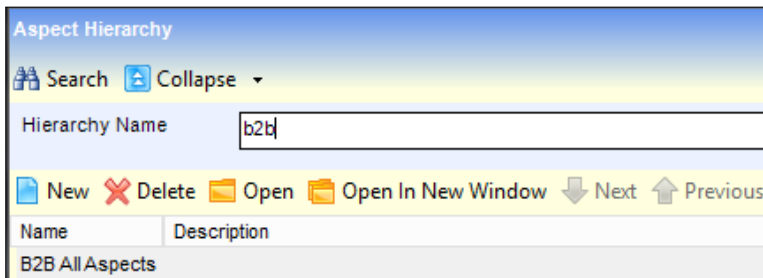
Import attainment file location

Suspense file location

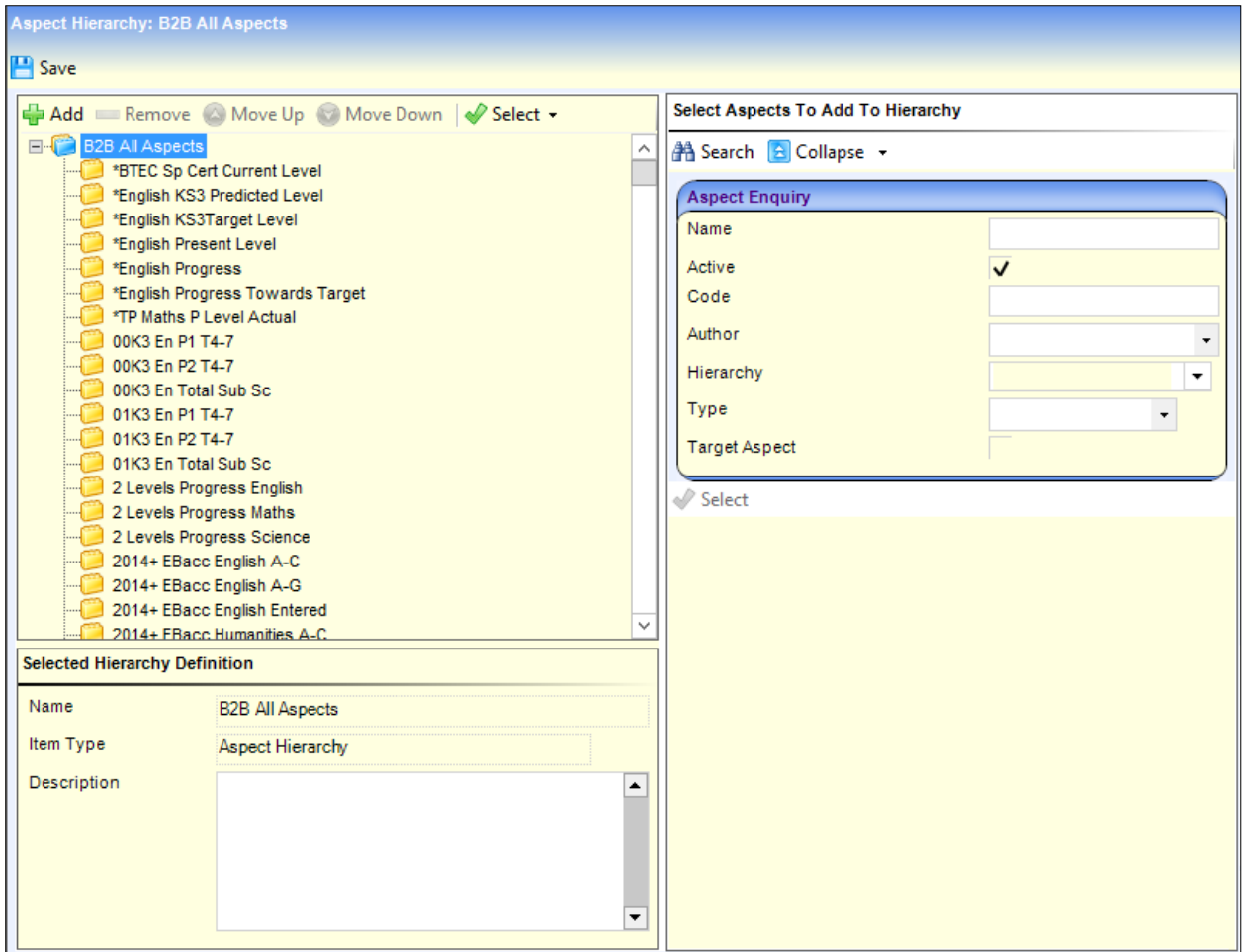
- Ensure that the required users (including the network account) have read-write access to the import and suspense directories. For more information, see [Windows permissions for the B2B attainment import and suspense folders](#) on page 27.
- If required, configure an alert to fire when a school officer updates or changes a B2B scheduled task owned by the school (use the 'B2B Attainment import task altered' trigger) . For more information, see [Alerts](#) on page 48.

## 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 hierchies 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 example:



For more information on creating aspect hierarchies, refer to the *Aspect Management* section in One v4 Client help, accesible in the v4 Client via **Help | Help**. The following is an example:



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.

The screenshot shows the 'Task Scheduler' interface with the following configuration:

- Task Details:** Task Scheduler tab is active.
- Data Details:** 'Attainment Copy' is entered in the text field. 'Active' checkbox is unchecked. 'Owner' is set to 'LA'.
- Transfer Details:** 'Transfer Type' is set to 'Export from School' (selected).
- Data Filter Details:** 'Attainment Data' is selected in the first dropdown, and 'B2B All Aspects' is selected in the second dropdown.
- Result from the last:** '6' months.
- Processing Options:** 'Allow file to be automatically processed via Pulse' is selected.
- Location for Import File:** 'D:\B2B\Attainment\Import\'. Includes an 'Optional sub folder location' field and a 'Test file access' button.
- Location for Suspense File:** 'D:\B2B\Attainment\Suspense\'. Includes an 'Optional sub folder location' field and a 'Test file access' button.
- Specification to Import attainment data into pulse:** 'B2B Attainment Results Fast Track' is entered in the text field.
- A '+ Clone Task' button is at the bottom left.

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 <b>Import Job Progress</b> page. For more information on viewing progress, see <a href="#">Import Job Progress</a> on page 59.
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 <b>Import Job Progress</b> page.

Option	Description
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 <b>Defaults for attainment Import</b> section via <b>Setup   System Defaults</b> .
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 <b>Defaults for attainment Import</b> section via <b>Setup   System Defaults</b> .
Test file access	Before a task can be saved, you must set a directory for import and suspense files and then click the corresponding <b>Test file access</b> buttons. If the test is successful, you can save the task.
Specification to Import attainment data into pulse	The only option is <b>B2B Attainment Results Fast Track</b> . 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 112.

**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 48.*

## 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)	Attainment Status Report (B2b_AttainmentStatusReport)
Base name	Base Name
File name	File name
Import date	Import date
Results not imported	Results imported
	Results not imported

To view a report:

1. 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, displaying a list of reports. The report 'B2b\_AttainmentResultsNotImport' is highlighted. The 'Run Report' button is visible at the bottom of the report details panel.

Report Title	Last Uploaded
B2b_AttainmentResultsNotImport	25/03/2019 10:27
B2b_AttainmentStatusReport	25/03/2019 10:27
B2b_ExceptionsReport	25/03/2019 10:27
B2b_RejectionsReport	25/03/2019 10:26
B2b_ScheduledTaskMigrationReport	25/03/2019 10:27

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

The screenshot shows the 'Report Parameters' dialog for the 'B2b\_AttainmentResultsNotImport' report. It features a table with two columns: 'Parameter Name' and 'Parameter Value'. The 'Import from' and 'Import to' parameters are visible. The 'Submit Report' button is located at the bottom right.

Parameter Name	Parameter Value
Import from	
Import to	

3. Specify the dates you want the report to cover in the **Import from** and **Import to** fields.

Parameter Name	Parameter Value
Import from	01/01/2019
Import to	11/04/2019

Cancel Submit Report

- 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

- 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_AttainmentResultsNotImport	11/04/2019 15:07		Completed
✔ B2b_ScheduledTaskMigrationStat usReport	11/04/2019 08:39		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 Status

Completed

View Report X

CAPITA



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_rajiallaspects_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

# 08 | 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

**Appendix**

<b>v4 Table name</b>	<b>v3 Table that was replaced</b>	<b>Comments</b>
B2B_EXPORT_ERRORS		Logs any errors which are related to the export

# 09 | 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.



## Glossary

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	<p>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</p>
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	<p>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.</p>
Matched	<p>This is where the system has not been able to automatically make a match for incoming Employee.</p>
Matched Carer	<p>This is where the system has been able to establish a match between the incoming Carer and a Person held in One.</p>
Matched Student	<p>This is where the system has been able to establish a match between the incoming Student and a Student held in One.</p>
One	<p>A Capita suite of modules aimed at Local Authorities.</p>
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	<p>A concept specific to data transfer, in which a field/record can be owned by either the School/ LA.</p>
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	<p>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.</p>
Rejected Comments	<p>Mandatory information that is attached to all data that has been rejected.</p>

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 <a href="http://www.w3.org">www.w3.org</a> website

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