Management Information

B2B

(Data Synchronisation between Schools and the LA)

Guidance for Downloading &

Uploading B2B Reports

Kent County Council - Management Information B2B – Guidance for Downloading & Uploading B2B files v2



Introduction

B2B enables the automatic and seamless transfer of core student data between SIMS and ONE, creating a truly integrated system for schools and local authorities (LAs). Users have the advantage of being able to collect data from source and use the same data many times. B2B supports LAs when dealing with core student and attendance data, enabling LA Officers to meet information requests and access the latest most accurate data without placing any additional burdens on schools. Where data validation fails on ONE, or where changes are made in the LA, B2B also transfers data from LA to school to ensure that both systems are synchronised.

What is sent via B2B?

- **Core student data from schools to ONE** including name, UPN, date of birth, home address, ethnicity, home language, first language, SEN status, SEN needs, year taught in, religion, registration group, Connexions assent, current school start/end date, enrolment status, English as an additional language, gifted and talented indicator, service children in education and traveller family status.
- **Return data to school** key data items can be returned to the SIMS database to ensure that both SIMS and ONE are synchronised fields which can be returned to schools including UPN, surname, forename, middle names, gender, date of birth and address.
- **Exclusions data** includes permanent, fixed and lunchtime exclusions (start and end dates) and primary reason for exclusions against the term and academic year.
- Attendance data includes AM and PM marks for daily session attendance for each student/pupil and previous years.
- **Change tracking** tracks and transfers the changes made to student records in SIMS, minimising the amount of data to be processed by ONE and minimising transfer time.

Overview of B2B Process

- Data transfer from to LA Schools will already have scheduled tasks set up within SIMS to transfer data from their management information system to the LA. These tasks are automatic and will run outside of working hours.
- LA Processing Management Information will process the data and generate a report of anomalies between your SIMS system and our central ONE system.
- Downloading your B2B file via Perspective Lite Whenever new files are uploaded by the LA you will receive an email alert reminding you to login to Perspective Lite to download the documents.
- School Processing For any differences identified on the report the data item(s) will be printed in bold text together with instructional comments and tick boxes. It is important that you verify from your paper records for any student data differences. Where SIMS is incorrect please amend your data.
- Uploading your B2B file via ONE Online You will indicate on the report which data is correct in the tick boxes and upload the report to ONE Online (currently used for School Census and Key Stage collection files).
- LA Amendments Where ONE is incorrect, on return of the report, we will amend our data to match yours.
- Security The data transfer process is securely maintained for maximum protection.

Downloading your B2B report via Perspective Lite

• You will receive an e-mail notification alerting you to log onto **Perspective Lite** to view/download documents.

https://perspective.angelsolutions.co.uk

It is worth adding **Perspective Lite** as a favourite on Internet Explorer on your initial login for easy future access.

Please be aware that your e-mail address maybe set up as headteacher@ therefore it is important your head teacher forwards on any e-mail notifications to the correct member of staff in the school.



 Login to Perspective Lite using the login details you should all have received by e-mail.

If you have not yet received your login details please email Angel Solutions at **perspectivesupport@angelsolutions.co.uk** or call them on **0845 129 7196**.

spective helps school and children's centre senior and middle leaders to self review confide s, and quickly monitor performance and impact. ret a customer? Find out more by <u>clicking here</u>	ently and accurately, create and maintain robust improvement
Ofsted and the SEF	To log in, enter your username and password username :
Perspective supports the 2012 Ofsted Inspection Framework and upcoming changes in Sept 2012.	Forgotten your password?

If you have **forgotten your password** there is an option to have your password e-mailed to you.

Self Evaluation Planning Performance Mgmt Reports Documents Su	urveys News	Admin	
1Y INBOX	Filter Inbox	۰.	
New/Updated LA Documents There are new or updated LA Documents available in the Document Pool	12/09/2012	0	What is Perspective Lite?
	view documents		Find out what you can de
New/Updated LA Documents	10/09/2012	0	In Perspective Lite
	view documents		You can also upgrade to
Welcome to your Inbox	07/09/2012	0	access all of the other features in Perspective.
As part of the latest release of Perspective Lite you now nave access to an integrated intox on the homepage	view article		ring out more
Perspective News	07/09/2012	0	
item like this will appear.	view article		Real User Stories

- When you first login to Perspective Lite you will be able to view the most recent notifications for your school
- You can then view the most recent documents that have been made available by your LA by clicking on the "view documents" link in the New/Updated LA Documents panel
- You will see all files waiting to be downloaded. B2B files will be named in the following format B2BreportWeekXX.doc

Where **XX** is the week number

	Title	Description	Uploaded Date
Ē	Survey Letter to Schools.doc		03/04/2012
	b2breportsWeek13.doc		19/04/2012
ſ	Test File.xls		26/03/2012

• Click on the file and select Open/or Save in your B2B folder

	Title	Do you want to open or save this file?
ſ	Survey Letter to Schools.doc	Name: 886b2breportsWeek13.doc
6		Type: Microsoft Word 97 - 2003 Document
L	b2breportsWeek13.doc	From: perspective.angelsolutions.co.uk
	<u>Test File.xls</u>	Open Save Cancel
		While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

School Investigation & Processing

• The report will open in Word with instructions on the front page.

) 🐸 🖬 🕘 🎒 🖄 🖤	월, 동 15 18, 47 19 - 10 - 19, 9 💷 🗃 🎟 🛷 47 11 100% - 1 10 12 Read -	
4	🕻 Normal + Arial 🔽 Arial		
		at word Field • 1 😂 🕼 😌 👔 H 4 🚺 🕨 H 10 - 10 - 10 - 10 - 10 - 10 - 10 - 1	
		n 🛛	1 .
5 - 1 - 4 - 1		3rd Flior, <u>Invicta</u> House Maistone Kent MET 1 XX Tel: 06458 247 <u>247</u> .	
1 - 2 - 1 - 5 - 1 -		Head teacher Fac: 01622 694449 Green Abbey School Our ref: MMM/2066 Green Abbey Road Date: 29/03/2012 Green Abbey Kent	
. 8 6		Dear Colleague	
9		B2B Weekly Anomaly Report	
-12-1-11-		This report has been produced as a result of the B28 weekly pupil data upload of your SIMS data, for either new or amended records. The report details differences between your SIMS system and our central ONE system (formally known as EMS).	
1-14-1-13-1		For any differences identified the data item(s) will be printed in bold text together with instructional comment and tick boxes. Please indicate in the tick <u>box(ss</u>) on this Word document with a X which information is correct . It is important that you verify from your paper records for any student data differences.	
- 10 - 1 - 15 -		Where SIMS is incorrect please amend your data. Where ONE is incorrect, on return of the report, we will amend our data to match yours. Please return to us electronically by uploading this Word document via ONE Online.	
- G		https://emsonline.kent.gov.uk/ems/ems_home.asp	
÷		Guidance of this B2B procedure can be found on our page on KentTrustWeb.	×
- 18		http://www.kenttrustweb.org.uk/Finance-Assessment/datacollection.cfm	•
= 4	a 🔲 3 🗸 🖌	a contraction of the second	>
Dra	aw • 🗟 AutoShapes • 🔪	N 디 O 진 세 슈 및 团 🖉 · 🚄 · 스 · 〓 扁 류 및 🗿 🔒	

• For any differences identified the data item(s) will be printed in bold text together with an instructional comment and tick boxes.

Please indicate in the tick box(es) on this Word document with a large bold **X** which information is **<u>correct</u>**.

It is important that you verify from your **paper records** for any student data differences. Where SIMS is incorrect please amend your data on your system

1111	Green Abbey School		
Student De	etails School Data	LA Data - ONE	
Forename:	Joe	X Joseph	Please tick which is the correct legal forename.
Surname:	Eloggs	Eloggs	
DOB:	26/01/2006	26/01/2006	
Gender:	M	M	
JPN:	R886111110001	R886111110001	
Forename: Bur na r e: DOB: Gender: JPN:	X Emma DAVIDS 21/09/2007 F U886111110002	Emily Davids X 26/09/2007 F U886111110002	Please tick which is the correct legal forename. Please confirm which date of birth is correct.
Forename:	X Jamie	James	Please tick which is the correct legal forename.
Sumame:	Bennett	Bennett	
DOB:	05/05/2007	05/05/2007	
Gender:	M	M	
JPN:	P886111110003	P886111110003	
A Address:	X 1, Green Abbey Road,	Green Abbey, Kent PA3 9NF	:
	The postcode you have	provided is PA2 9NF which do	bes not appear to be correct for the above address.
	the address we have is	correct please amend your sys	stern.

Please Note: If you are downloading your B2B report for the first time it might be worth setting up a **B2B folder** to save your reports, so you know where to find them when you come to uploading them to Perspective.



• Save your B2B report in your B2B folder

Save As			?×
Save in:	🛅 В2В	💌 🎯 ד 🔰 💐 🗡 📷 🎹 ד Tools ד	
My Recent Documents			
Desktop			
My Documents			
My Computer			
	File name:		
My Network Places	Save as type:	Bich Text Format (* rtf)	ncel

Sending your B2B report to the LA via Perspective Lite

• You will need to open Internet Explorer and connect to Perspective Lite

https://perspective.angelsolutions.co.uk

- Please see page 3 if you are having problems logging into Perspective Lite
- Once logged in hover the mouse over **Documents** and click on **Send Files**

	Pe	rspe	ective	ith NCER				
Ħ	Self Evaluation	Planning	Perf. Mgmt	Reports	Documents	Surveys	News	Watchsted
M				2.01	Document P	pol	Fil	ter Inbox 🔍
PI	View the la	tast 1 A dasu	mante		Send Files	K _		
	View the m	nost recent d	ocuments sent 1	to you by you	ir LA.			

• To locate the file you will need to click on the **Browse** button. You will then need to find the file you wish to upload on your computer saved in your relevant folder

								?▼ 」	Logout x
NCER									(3)
ports	Documents	Surveys	Visits	News	Watchs	ited	Admin		
	Upload a	a new file t s file: Untag	o send ged		-	Brows	se	Upload & Send	
									v
)emo	LA (Angel)					All			•
	Sent On		Received		Re	eceived	d By		
	07/03/13 @	9:01 AM	ali 08/05/1	3 @ 9:59 /	AM Jol	nn Tuffne	ell		

• Select the file tag of B2B

NCER			? ¥	Logout x		
ports Documents Su	rveys Visits N	ews Watchsted	Admin			
Upload a no	w file to send					
Upload a normal transmission of the Tag this file	Untagged Untagged Census EYFSP		wse Uplo & Se	ad end		
upload a m Tag this file	w file to send Untagged Untagged Census EYFSP Phonics KS1 KS1 KS2 TA KS2 TA KS3 TA B2B	Brov	wse Uplo	ad end		
Upload a m Tag this file Demo LA (Angel) Sent On -	W file to send Untagged Untagged Census EYFSP Phonics KS1 KS2 TA KS2 TA KS3 TA B2B Other	Brov	wse Upla & Se	ad end	- · · · · ·	

- Once you have found the file, you can then click **Upload & Send** to start the secure upload process for adding the file to Perspective Lite and sending to the LA
- When the file has uploaded/sent you will receive a message on screen to let you know if this process has been successful

Your file has been uploaded and sent to Kent.
 Once Kent receives your file a copy is available for you to download in the Previously Sent section (see below) for the following 30 days. If you wish to keep the file we suggest you store it on your computer or network.

- You have now sent the file and can exit if you wish, or you can locate another file that you wish to send
- All sent files are visible in the Files Previously Sent section at the bottom of the page
- You will be able to see the name of the file, who uploaded it and the date it was sent
- You can also see if the file has been received by the LA, when they have received it and who received it
- There are three options available to you when you are viewing the **Files Previously Sent**. These are:
 - o All
 - o Sent and Not Yet Received
 - o Received
- You will only be able to recall a file that has not yet been received by your LA.

You can do this by simply clicking on the **Recall** button next to the document that you want to recall. This will remove the file from Perspective Lite and mean that this file can no longer be accessed by the LA.