

Management Information

B2B

(Data Synchronisation between Schools and the LA)

Guidance for Downloading & Uploading B2B Reports

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.

New documents have now been made available for your school by KCCs Management Information team. To view them, log in to Perspective/Perspective Lite by following the link below:

<https://perspective.angelsolutions.co.uk>

Documents :

b2breportsWeek17.doc

If you have received this email through your headteacher@ email address please can you ensure that you forward this message to relevant colleagues who may be responsible for data downloading/processing in your school.

If you have any queries please email us at management.information@kent.gov.uk with Perspective as the title of your message.

Thank You

Management Information (ELS)

- 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**.

Perspective

Welcome to Perspective

Perspective helps school and children's centre senior and middle leaders to self review confidently and accurately, create and maintain robust improvement plans, and quickly monitor performance and impact.

Not yet a customer? Find out more by [clicking here](#)

Ofsted and the SEF

Perspective supports the 2012 Ofsted Inspection Framework and upcoming changes in Sept 2012.

Find out more

To log in, enter your username and password

username :

password :

[forgotten your password?](#)

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

- 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**

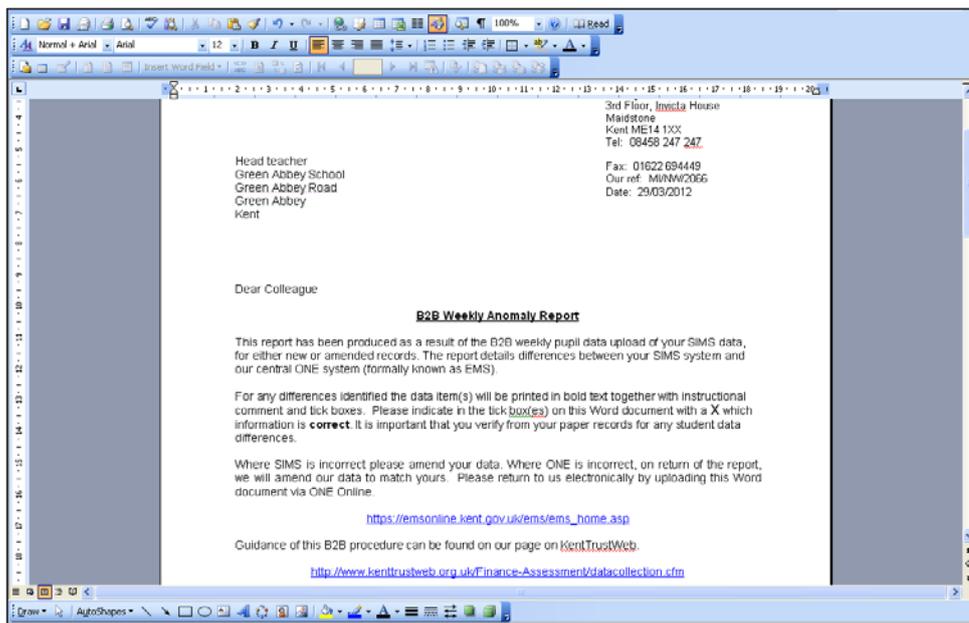
Where **XX** is the week number

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

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

School Investigation & Processing

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



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

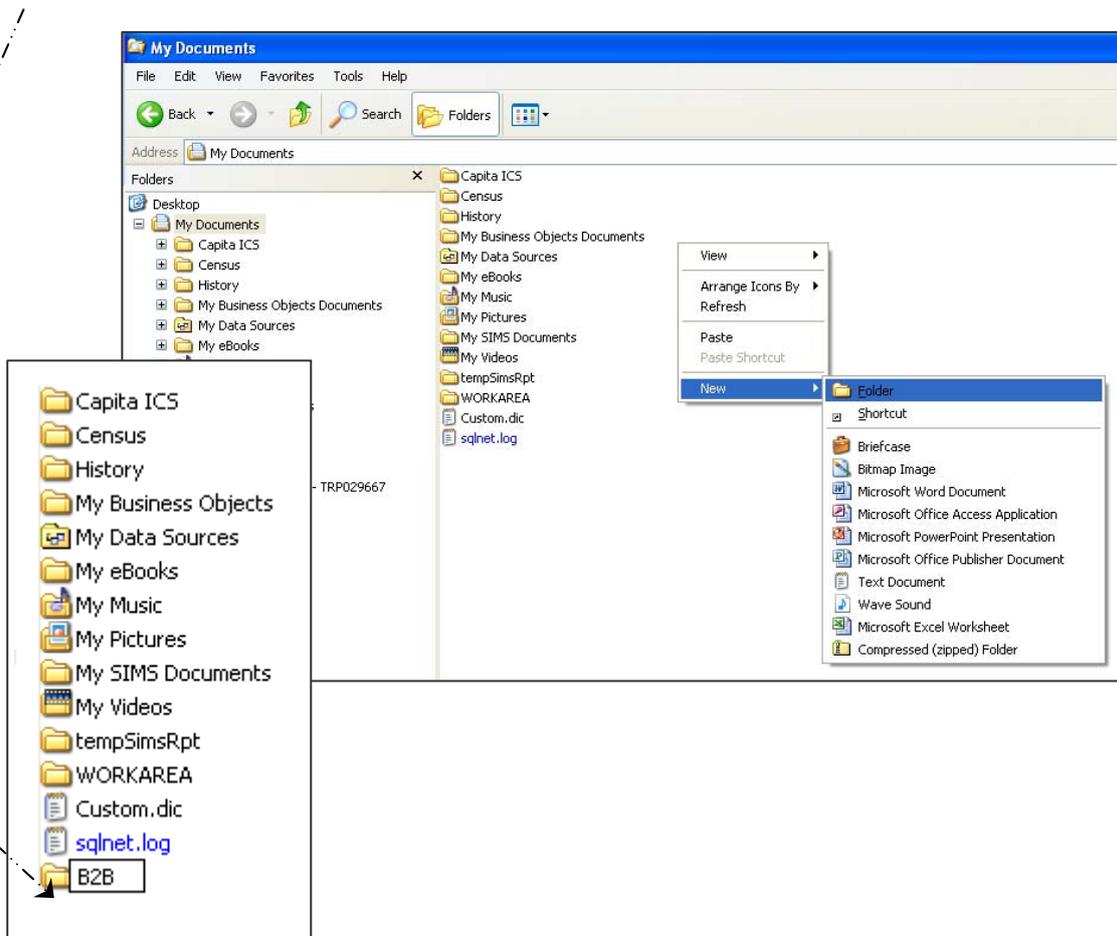
Please indicate in the tick box(es) on this Word document with a large bold **X** which information is **correct**.

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**

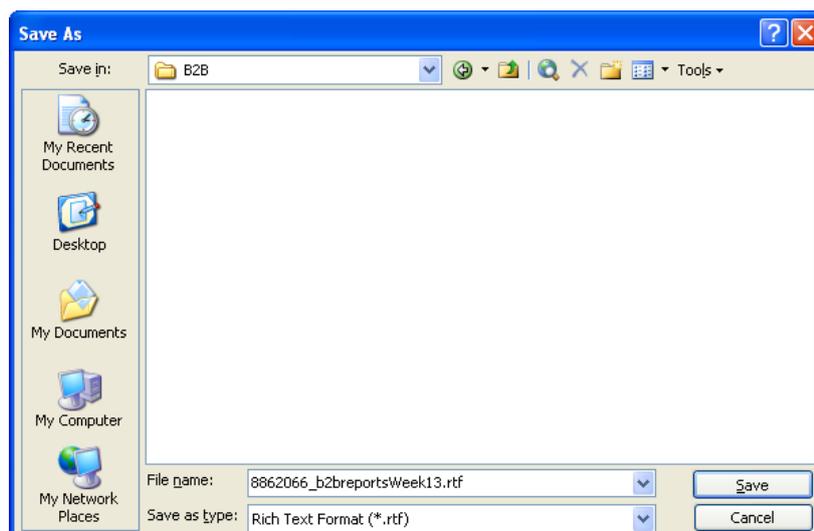
1111 Green Abbey School			
Student Details	School Data	LA Data - ONE	
Forename: <input type="checkbox"/>	Joe	<input checked="" type="checkbox"/> Joseph	Please tick which is the correct legal forename.
Surname:	Bloggs	Bloggs	
DOB:	26/01/2006	26/01/2006	
Gender:	M	M	
UPN:	R886111110001	R886111110001	
Forename: <input checked="" type="checkbox"/>	Emma	<input type="checkbox"/> Emily	Please tick which is the correct legal forename.
Surname:	DAVIDS	 Davids	
DOB:	<input type="checkbox"/> 21/09/2007	<input checked="" type="checkbox"/> 26/09/2007	Please confirm which date of birth is correct.
Gender:	F	F	
UPN:	U886111110002	U886111110002	
Forename: <input checked="" type="checkbox"/>	Jamie	<input type="checkbox"/> James	Please tick which is the correct legal forename.
Surname:	Bennett	Bennett	
DOB:	05/05/2007	05/05/2007	
Gender:	M	M	
UPN:	P886111110003	P886111110003	
LA Address: <input checked="" type="checkbox"/>	1, Green Abbey Road, Green Abbey, Kent PA3 9NF		
	The postcode you have provided is PA2 9NF which does not appear to be correct for the above address. If the address we have is correct please amend your system.		

For reference a total of **3 pupil data records** were printed

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**



Sending your B2B report to the LA via Perspective Lite

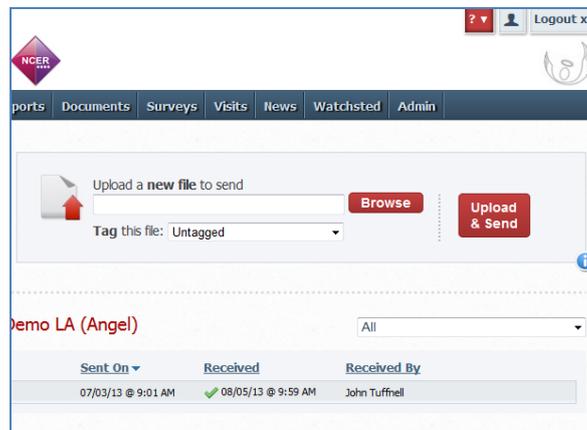
- You will need to open Internet Explorer and connect to **Perspective Lite**

<https://perspective.angelsolutions.co.uk>

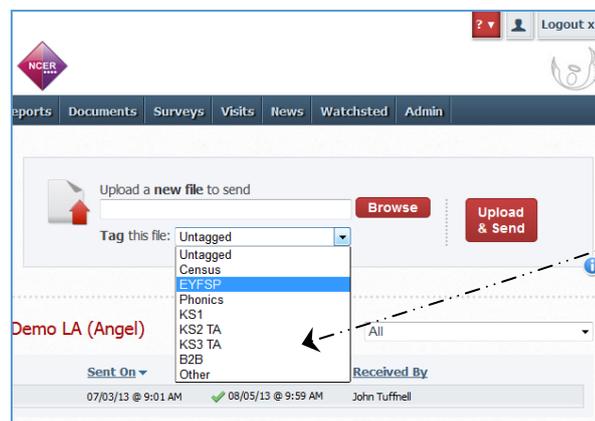
- Please see page 3 if you are having problems logging into Perspective Lite
- Once logged in hover the mouse over **Documents** and click on **Send Files**



- 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



- Select the file tag of B2B



- 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. x

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:
 - All
 - Sent and Not Yet Received
 - 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.