

Linking Personnel 7 and FPSadvance.Net

Version 1.0

Contents

Revision History	3
Introduction	3
What is FPSadvance.Net?	3
Licensing Requirements	3
Mapping Staff to CFR Codes in Personnel 7	3
Importing the Staff Details and Pay Information into FPSadvance.Net.....	4
Summary of the Data Imported into FPSadvance.Net	6
Appendix: Checklist of Activities.....	7

Revision History

Doc. Version	Change Description	Date
1.0	Initial Release	21/11/08

Introduction

This handbook is designed to provide guidance notes on linking Personnel 7 and FPSAdvance.Net. It is not intended as a guide to using either Personnel 7 or FPSAdvance.Net. Both these systems have their own help file system and associated documents which provide more details.

What is FPSAdvance.Net?

FPSAdvance.Net provides schools with the ability to create multi-year budgets in line with the Governments 'Good Practice' requirements. These budgets are created using the CFR framework which is currently applicable to English Maintained schools.

Licensing Requirements

A licence patch must be applied in order to use the interface. This patch can be obtained from Capita Children's Services.

Mapping Staff to CFR Codes in Personnel 7

Because FPSAdvance.Net uses the CFR framework to create the budget, each member of staff must be mapped to the correct CFR code. When the licence is applied, staff recorded as Teachers will be automatically mapped to E01. This can be edited, if required. Other members of staff will need to be mapped manually.

NOTE: When new members of staff are added they will also need to be mapped manually.

1. In SIMS .net, select **Focus | Person | Staff** to display the **Find Staff** browser.
2. Search for and select the required member of staff and click the **Open** button to display their details.
3. Click the **Employment Details** hyperlink to go to the **Employment Details** panel.
4. Highlight the appropriate **Contract** and click the **Open** button to display it.

1 Contract Details

Service Term	Teachers	Employment Type	Permanent
Post Reference	Teacher	Post Category	QT - Qualified Teacher
Post Reason		SWC Post	Unassigned
Contract Start Date	01/09/2002	Financial Subgroup	
Superannuation	Teachers	Contract/Payroll Number	PR234123
Increment Date	01/09	NI Contracted	In <input type="checkbox"/> Out <input checked="" type="checkbox"/>
Contract End Date		Leave Entitlement	0.0000
Post Offered Date		Contract Termination Reason	
Contract Issued Date		Post Accepted Date	
Service Term Hours/Week	26.2500	Service Term Weeks/Year	52.1430
Hours/Week	26.2500	Weeks/Year	52.1430
Pay Factor	1.0000	Pro Rata	1.0000
Safeguarded Salary	<input type="checkbox"/>	Pay Factor	1.0000
Destination		Budget to CFR	Teaching Staff - E01
Origin	Not known		Teaching Staff - E01
Pay Scale			Education support staff - E03
			Premises Staff - E04
			Administrative & clerical staff - E05
			Catering staff - E06
			Cost of other staff - E07
			Community focused extended school staff - E08

Scale	Start Date	End Date
Teachers Main Scale	01/09/2005	
Teachers Main Scale	01/09/2004	31/08/2005
Teachers Main Scale	01/09/2003	31/08/2004

5. Select the appropriate code from the **Budget to CFR** drop-down list.
6. Save the record and repeat the process for other contracts for the same member of staff and for other members of staff, as required.

Importing the Staff Details and Pay Information into FPSadvance.Net

NOTES: The import does not require all users to be logged out of SIMS .net. However, it is advisable not to make edits in Personnel 7 at the same time as the interface is run to ensure consistency of data.

Users must make sure that the data in Personnel 7 is kept up-to-date.

1. Open FPSadvance.Net and select **File | New Blank Model**.
2. Select **Data Links | SIMS | P7 | Import Staff Data** to display the **Import SIMS P7 Data** dialog.

Import SIMS P7 Data

SIMS P7 Link Module

☒ Use SIMS Connect.ini

Server Database

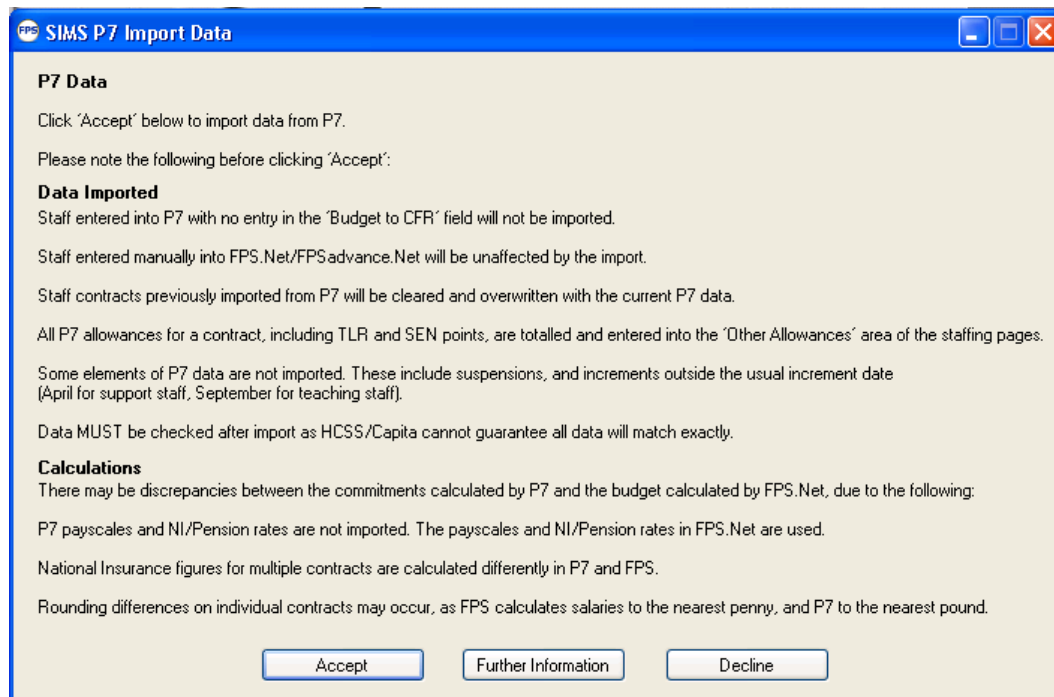
User Password

Select the Location of the Link File:

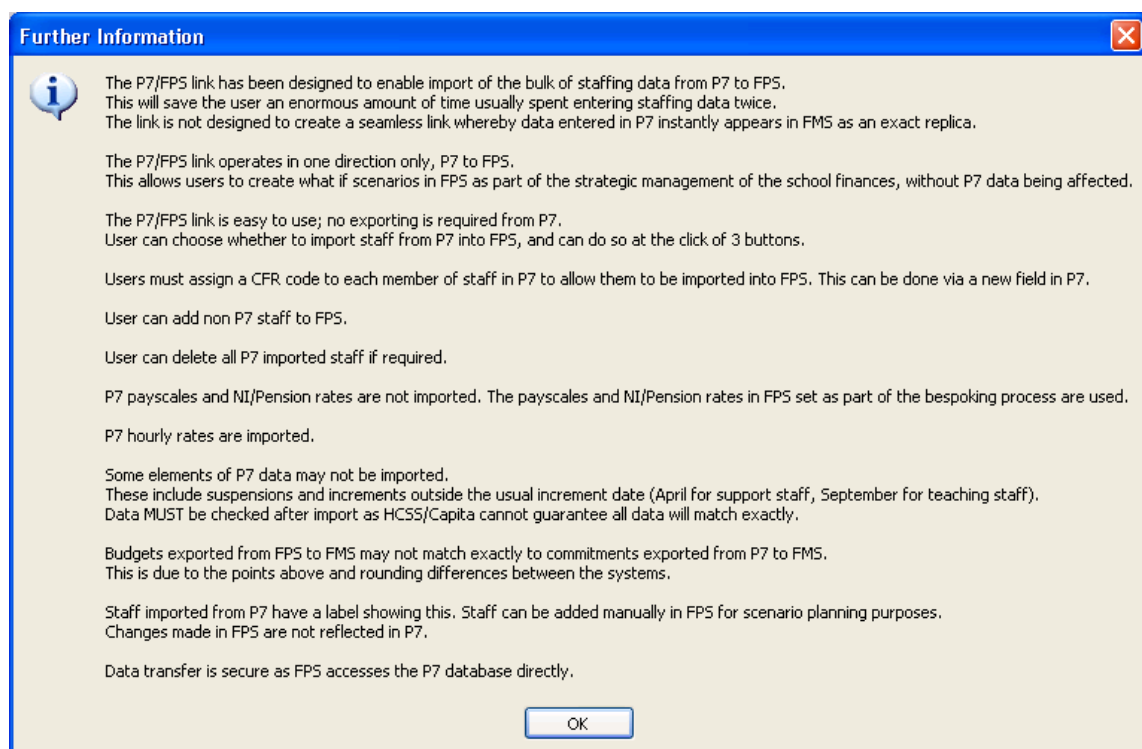
NOTE: The settings must be completed each time the import facility is used. This ensures that only users with appropriate permissions can access the data held in Personnel.

The **Use SIMS Connect.ini** check box is selected by default and should not be changed.

3. Enter the **User** name and **Password** of a user that has Personnel Officer and Personnel Data Exporter permissions.
4. Click the **Select File Location** button to display a standard Windows® **Open** dialog. Navigate to the SIMS .net folder and select the Personnel7ExportInterfaceProcess.dll, e.g. C:\Program Files\SIMS\SIMS .net\Personnel7ExportInterfaceProcess.dll.
5. Click the **Open** button.
6. Click the **Import Data** button.

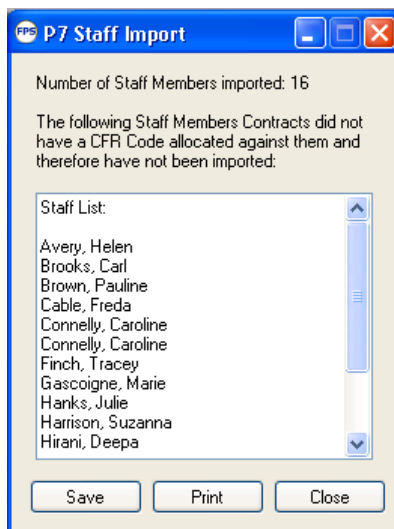


The **SIMS P7 Import Data** dialog displays important information about the import and should be read. Additional information can be displayed by clicking the **Further Information** button:



Click the **OK** button to close the **Further Information** dialog.

7. Click the **Accept** button on the **SIMS P7 Export Data** dialog to import the data from Personnel.
8. If any members of staff have not been mapped to a CFR code, the **P7 Staff Import** dialog is displayed.



This dialog lists all the members of staff who have not been imported.

- To save the list as a text file, click the **Save** button. A standard Windows® **Save As** dialog is displayed. Navigate to the appropriate location, enter a **File name** then click the **Save** button.
- Click the **Print** button to print the list.

9. Click the **Close** button to exit the dialog.

The data can then be used in FPSadvance.Net. Full details of the functionality available in FPSadvance.Net can be found in the online help by selecting **Help | Contents**.

Summary of the Data Imported into FPSadvance.Net

The following data will be imported into FPSadvance.Net:

NOTE: The Reference Date referred to will be the 1st April prior to the system date on which the import is run.

- Staff Details – staff are included when they have one or more contracts that are current on or after the Reference Date. All contracts that terminate before the Reference Date are excluded.
- Superannuation Details.
- Service Term Details – except where the Service Term is hidden. This includes all the Posts, Pay Scales and Allowances which are valid on or after the Reference Date.

NOTE: FPSadvance.Net selects the Scale Point from Personnel 7 and applies the rate from those defined in FPSadvance.Net.

Payscale, National Insurance and Pension Rates are not imported into FPSadvance.Net. The Payscale, National Insurance and Pension rates held in FPSadvance.Net are used.

Appendix: Checklist of Activities

The following activities should be carried out before creating your budgets in FPSadvance.Net.

NOTE: The FMS steps are only required if you have also applied the licence to link FMS and FPSadvance.Net.

Area	Task	SIMS .net / FMS Navigation path	FPSadvance.Net Navigation path	Notes
FMS	Create Financial Year for budget years.	In FMS, select Tools Define Financial Years Define Edit/Years.	N/A	Create the year. The status of the year can remain as 'Not Started'.
FMS	Define Salary Periods for all years.	In FMS, select Tools Define Financial Years Define Salary Periods.	N/A	
FMS	Update Next Year's structures.	In FMS, select Tools Define Financial Years Update Next Year's Structures.	N/A	This brings over any Cost Centres and Ledger Codes that have been created in the current year into the next year.
FMS	Apply the FMS/FPSadvance.Net Interface Budget Import Licence Activator.	In FMS, select Start All Programs SIMS Applications FMSSQL DBUpgrade.	N/A	This 'switches off' FMS Budget Planning. Once this licence has been applied the Chart of Accounts and the CFR Mappings for the school can be exported to FPSadvance.Net to allow the budget to be created. Until these have been exported, the FPSadvance.Net Cost Centre and Ledger Code description drop-down lists will be blank.
FMS and FPSadvance.Net	Export CFR Mappings.	In FMS, select Tools General Ledger Setup Tab 8: CFR Mappings.	Data Links SIMS FMS Import FMS Coding.	FMS: Note where the mapping export file is stored.
FMS and FPSadvance.Net	Export Chart of Accounts.	In FMS, select Reports General Ledger Setup Chart of Accounts Listing.	Data Links SIMS FMS Import FMS Coding.	FMS: Note where the Chart of Account file is stored.

Area	Task	SIMS .net / FMS Navigation path	FPSadvance.Net Navigation path	Notes
FMS and FPSadvance.Net	Import the CFR Mappings and the Chart of Accounts into FPSadvance.Net and verify that they have imported successfully.	N/A	Data Links SIMS FMS Import FMS Coding.	Once imported, in Data Input Specific Expenditure , select any CFR expenditure code. Using the drop-down list on the Cost Centre and Ledger Code descriptions, check that the values which have been imported from FMS are appropriate.
Personnel 7 and FPSadvance.Net	Ensure that the Personnel 7 licence has been applied and that the Budget to CFR field appears in the Contract Details page.	In SIMS .net, select Focus Person Staff – select a member of staff's details. On the Staff Details page, go to the Employment Details panel and open a Contract . If the licence has been applied there should be a new field, Budget to CFR .	N/A	For teachers the Budget to CFR field should be automatically populated with Teaching Staff - E01. For all non-teaching staff this field will be blank. Select the appropriate E03-E07 and E31 values from the drop-down list.
System Manager	Ensure that a user has been set up with Personnel Officer and Personnel Data Exporter permissions.	In System Manager, use the Assign User to a Group function on the Welcome Screen.		This should be carried out by your system administrator.
Personnel 7	Ensure that the CCSBaselookups file has been imported.	In SIMS .net, select Tools Lookups Import Lookups .	N/A	The latest CCS_Base_Lookups file is located in the SIMS .net folder. The lookups enable you to import a set of standard and statutory data. NOTE: When the import is successful, the SWC Post field (accessed via Tools Staff Pay Related and opening a post on a Service Term) will default to unassigned. The SWC Post field will need to be defined for each Post, otherwise the members of staff on that Service Term will not import into FPSadvance.Net.

Area	Task	SIMS .net / FMS Navigation path	FPSadvance.Net Navigation path	Notes
Personnel 7 and FPSadvance.Net	Ensure that the Pay Scale is defined for each Scale (this is a School Workforce Census requirement in England).	In SIMS .net, select Tools Staff Pay Related . Select the appropriate Service Term, highlight a Scale in the Pay Awards panel and click the Open button. Ensure that the appropriate Pay Scale is selected from the drop-down list.	Data Settings Pay Scales.	
Personnel 7 and FPSadvance.Net	Check that the Scale Awards are identical in Personnel 7 and FPSadvance.Net.	In SIMS .net, select Tools Staff Pay Related . Select the appropriate Service Term and complete the Pay Awards panel.	Data Settings Pay Scales.	<p>The data in SIMS .net should replicate that held in FPSadvance.Net. If there is a mismatch, FMS Salary Projections will be incorrect.</p> <p>If you require a salary report from FPSadvance.Net, select Data Settings Payscales Main, then click the Print to Excel button. Click the OK button on the Show Years in Report dialog. This generates a report for all Pay Scales on each Service Term.</p>
Personnel 7	Check that the School Workforce Census post is defined on the Service Term.	In SIMS .net, select Tools Staff Pay Related . Select the appropriate Service Term and ensure the SWC Post is assigned in the Edit Post dialog accessible from the Posts panel.		
Personnel 7 and FPSadvance.Net	Check that the Superannuation rates are identical in Personnel 7 and FPSadvance.Net.	In SIMS .net, select Tools Staff Superannuation .	Data Settings Pay Related and Inflation Factors.	
Personnel 7 and FPSadvance.Net	Ensure current National Insurance Rates are defined in Personnel 7.	In SIMS .net, select Tools Staff National Insurance .	Data Settings Pay Related and Inflation Factors.	

Increments for Teaching Staff in FPSadvance.Net

Only teachers on the Teachers Main Scale Pay Award will be assumed to have an increment in FPSadvance.Net. Leadership, Advanced Skills Teachers, etc. will not automatically be assumed to have an increment.