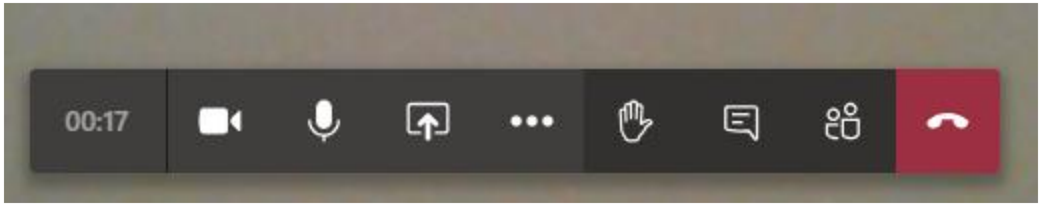
SIMS to SAP Overview and Guidance Webinar for Live Schools

Sheryl Everett & Chris Holden

Housekeeping

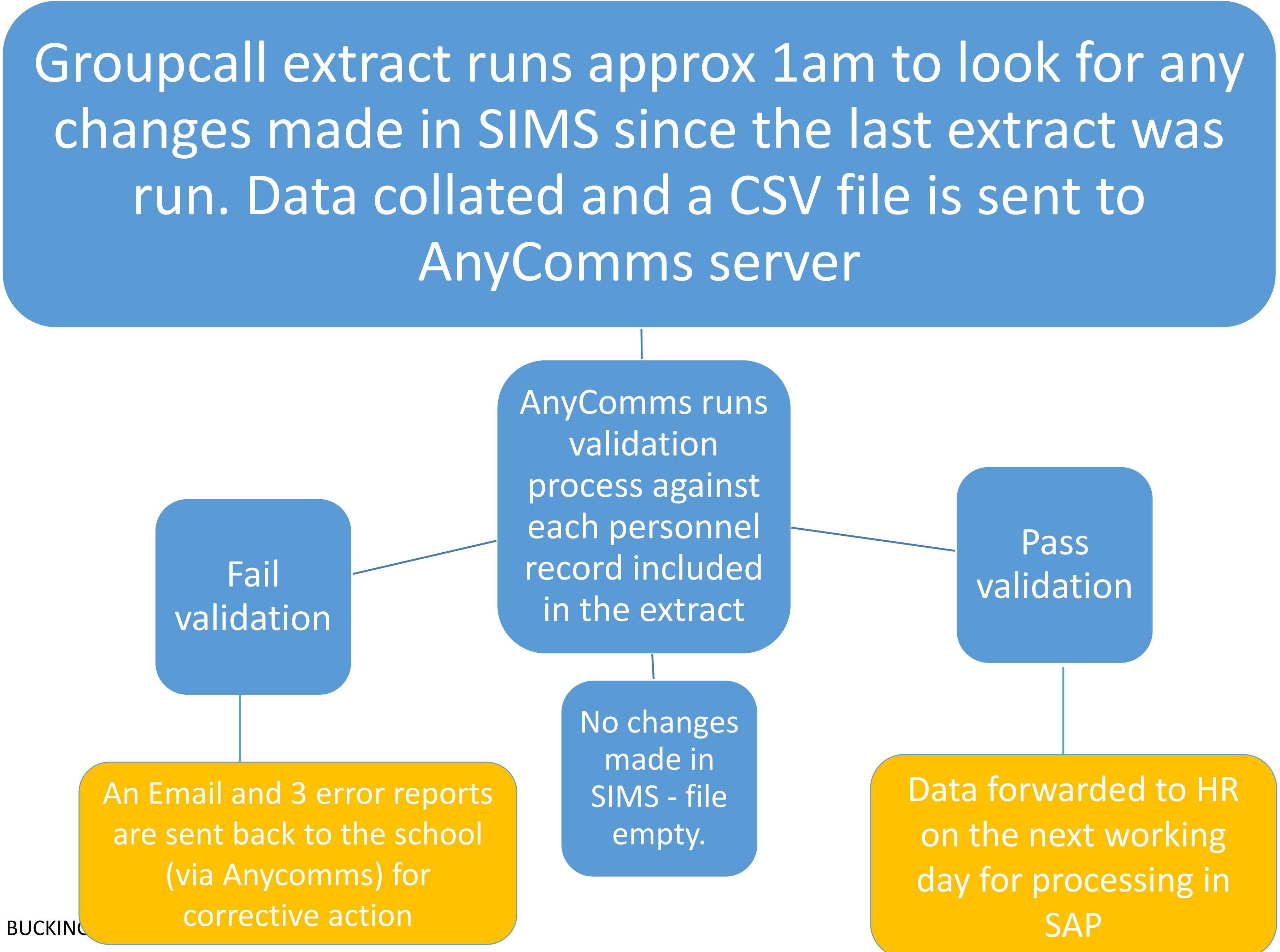


- please turn off all cameras
- mute microphones during the Webinar
- we welcome contributions throughout,
  - if you have a question, could you use the chat / message facility on Teams, which will be picked up by me or a SIMS colleague
  - Use the ‘ if you want to ask a question or say something.

Introduction

- The SIMS to SAP solution provides a transfer of data from the school's SIMS system to the payroll software SAP, using an extractor tool and AnyComms Plus to transfer the data.

- **Project Criteria 2016:**
- The development of the SIMS to SAP mechanism was to provide an service offering to our current payroll service customers. To reduce data entry duplication in the school
- Once data is being successfully received Eform access to the LVTC form and absence reporting function will be switched off.
- Schools will still have Eform access for inputting Supply / Overtime claims and to access the Employee Data Report.


Groupcall extract runs approx 1am to look for any changes made in SIMS since the last extract was run. Data collated and a CSV file is sent to AnyComms server
AnyComms runs validation process against each personnel record included in the extract
Fail validation
No changes made in SIMS - file empty.
Pass validation
An Email and 3 error reports are sent back to the school (via Anycomms) for corrective action
Data forwarded to HR on the next working day for processing in SAP

INCLUSION IN THE SIMS TO SAP PROCESS

The following SIMS fields are included in the process
Changes/corrections to:

- Address
- Date of Birth
- Gender
- NI Number
- Contract information e.g.: Service term, Employment Type, Hours/Wk, Weeks/Yr, Salary information, Allowance information.
- Absence information
- Leavers

EXCLUSIONS FROM THE PROCESS

New starters

- Whether a brand new starter to the school or an existing member of staff starting a new post. Schools must complete and send a Notification of Appointment (NOA) form.

- Where possible, it is recommended NOT to create a personnel record in SIMS before it is fully updated with all necessary validation data.

- **Staff commencing or returning from maternity or adoption leave** due to statutory paperwork that needs to be submitted to ensure correct payments.
  - Current process should continue to be followed. (See Schoolsweb for paperwork required)

- **Protected Pay** – HR to be notified via service desk

- **Shift Allowances** - HR to be notified via Service desk

- **Senior Midday Supervisors** – i.e. teachers who are paid an hourly rate
  - HR to be notified by email for any changes
  - Please create a casual zero hours contract in SIMS
    - Use any BP Range/point – HR will ignore this information
- **Claims for employed Supply Teachers and Casual Bucks Pay staff (with a SAP number)** – Current E-form processes still need to be followed.
  - Please create a contract in SIMS

Validation Rules

In order to process changes a set of validations are performed by Anycomms and if any of the following occur, the record is rejected and the school informed:

- If the payroll/contract number field coming from SIMS is blank or incomplete.
- If the NI number field coming from SIMS is blank
- If there is a sickness absence but no illness category coming from SIMS
- For any absence where the days lost and hours lost are both zero
- If an allowance has been entered with no end date
- If an allowance has been entered but the annual amount has not been entered and left as £0.00

Pass validation

Data forwarded to HR for processing in SAP

SUCCESSFUL VALIDATIONS

- Having passed the initial validation rules the file is passed securely for processing in SAP. Depending on the amendments being made, the data will either automatically upload to SAP or will be passed to HR Payroll for manual processing.

- No changes are held ‘pending’ all changes are received the next working day. i.e changes made in July will not be ‘held’ until September

Fail validation

No Data has been passed to HR for Processing.

All failures / rejections will result in an automatic email to notify of files in Anycomms.

Three reports for downloading :

- a summary of the error/s
  - (e.g.8253035xxxxxxxx FailureSummary)
- a report breakdown showing which personnel record is affected
  - (e.g.8253035xxxxxxxx FailedValidationBad)
- a copy of the complete extract taken the day before.
  - (e.g. 8253035xxxxxxxx Original)

Most Common Data Processing Errors

- Do not extend absences
- Do ensure that changes to a contract are completed on the same day i.e. do not end a contract on one day and set up a new one on the next
  - ➢ **HR will assume employee is leaving**.
- Staff with Fixed Term contract(s)
  - – Destination must be NOT KNOWN on initial creation of the contract.
  - – If renewal of Fixed Term contract, clone original and update new information.
  - – Change Destination on original to “NA – Change to contract”
  - ➢ **This will prompt HR to expect a new FT Contract**

- If the Fixed Term contract is ending (with other open contracts)
  - change the Destination on original Fixed Term contract to

  "Remaining in the same LA – primary" or "Remaining in the same LA – secondary"

- Staff moving from Fixed Term to Permanent (on same service term/role)
  - ➢ **New contract in SIMS only**
- Do not overtype information in the current contract, if a changing hours or weeks per year
  - ➢ **A new contract must be created**
- Do ensure that all allowances have end dates
- Do not save an allowance with an amount of £0.00

➢ **These will now fail the extract alongside any other changes made for that staff member on that day.**

- Ensure allowance amount is between current minimum or maximum, where applicable
    - **Payroll will not recognise the allowance amount nor adjust this payment**
- Ensure correct allowance description is selected according to the value of the allowance
- Existing school staff starting a new role
    - **New Starter Form (NOA) for HR**
    - **New contract in SIMS**

ANYCOMMS FAILURE FILES

As part of the S2S process, validations are performed each time data is extracted from your systems to check for the following:

- A SAP number is present in the contract and has 8 digits
- An NI number is present in the personal details
- An illness category is present for a sickness absence.
- ‘Days lost’ or ‘hours lost’ are present for any absence
- An end date is present on all allowances
- The annual amount is greater than £0.00 on all allowances

If any of the above is missing when extracting your data, the validation will fail and you will receive the following reports:

Failed Validations (Rejections)

All rejections will automatically be communicated overnight to the corresponding schools via an email notification that files exist in Anycomms.

Three reports for downloading in AnyComms:

- a summary of the error/s
  - (e.g.8253035xxxxxxxx FailureSummary)
- a report breakdown showing which personnel record is affected
  - (e.g.8253035xxxxxxxx FailedValidationBad)
- a copy of the complete extract taken the day before.
  - (e.g. 8253035xxxxxxxx Original)

- **FailureSummary** gives details of the missing data.
- The error message is spread over two columns for each error. **NB.** Make sure you expand all of the columns to view all of the data in the report
- Each error message references the line number to be viewed on the FailedValidationBAd report.

- **FailedValidationBad** report gives details of the member of staff and displays all of the changes being made to the staff record on that day, which has failed to reach HR.

NB. More than one change may have been made, e.g. an absence and a change of hours. If the absence failed, none of the data will reach HR so it is important to check the whole line to identify such cases.

This is particularly important where schools have devolved responsibilities and more than one person may be making changes to a record on the same day.

- **Original** report is a complete copy of the data extracted the previous day. This report is for use by the SIMS team if any issues are experienced.

There are errors?

Errors will only appear once

- They will NOT be repeated.
- It is important therefore that you action these queries immediately to ensure that employees are paid correctly and on time.
  - If the error relates to a missing SAP No. or NI No., the school will have to email details of the change/s to the HR Service desk.
  - If the error relates to just absences or allowances, the data will be re-extracted once the record has been amended.

- If more than one change has been made to a record, (e.g an absence and a contract change entered on the same day), and any part of those changes fail, ALL changes will fail and HR will need to be notified via an email to the HR Service Desk.

SECONDARY SCHOOLS USING COVER

- It should be noted that secondary schools using cover will encounter errors where the sickness absence has been entered by this route as no illness category can be input at this stage and both the day/hours lost will be zero.
- Careful checking of the FailedValidationBad report must be competed to make sure no other changes were being made on the same day as they will not reach HR due to the absence entry failing.

Confirmation of HR Changes

To ensure your data changes have been processed in SAP, you have three methods for checking:

- HR Changes report, received monthly, reflects all of the changes made.
- The Employee Data Report (via eforms) provides a 'live view' of the data held in SAP
- HR & Payroll Costing Reports (PN41)

HR CHANGES REPORT

The HR Changes Report details changes made in SAP

- The report will be sent to schools immediately following the payroll cut off.

- Please note changes are shown in the month they are happening (i.e. effective date of change), not the month the SIMS record was updated.

- We recommend as best practice that you hold ‘change’ paperwork in a file and marry it against the HR Action report to ensure all changes are accounted for. This includes changes to contracts, leavers etc.

- School are asked to check the information contained in the report immediately to ensure the changes made in SAP reflect the school requirements

- To avoid under/overpayments being made, any errors must be notified to the HR Service desk immediately; if the error has been made in the SIMS record, it must be corrected to ensure consistency of data across the two systems.

- It is recommended as best practice that the HR Changes report is countersigned by either the Ch. of Governors or Ch. of Finance Committee for any change to a Headteacher’s salary.

- If the error has been made in SAP only, an email confirming the correct information must be sent to HR to rectify the issue.

- Each month the HR Changes report must be signed by the HT to confirm the changes made to all personnel records. This is particularly relevant for any changes to contracts for staff maintaining SIMS records.

- For any changes to the headteacher's salary, an email from the Ch. of Governors personal email account must be sent to the HR Service Desk to confirm the change. Without this, no changes to salary will be made in SAP.
- **HR will no longer be contacting you directly regarding this**

SCHOOLS EMPLOYEE DATA REPORT – EFORMS

- This report is available in Eforms and provides information on data held in SAP for your staff. Accessing this information will save phone calls to HR to establish what information they have for a given individual.
- **Please note: HR have up until the 14th of the month to complete all input so changes may not appear straight away**
- This report can be used to **confirm a change of contract terms and conditions for a member of staff.**
- Once printed, both the Headteacher and staff member should sign the form. A copy passed to the individual and the original retained on the employee's file.

The report can be used to:

- Produce a form for the employee / HT to sign to acknowledge contract changes (like the current LVTC).
- By changing the effective date of the report, you can produce a ‘future change’ form for signing.
- You can tailor the report to meet your requirements by selecting tick boxes for the data you wish to see
- Produce a report for all absences for all employees within your school for the last eight weeks

HR & Payroll Costing Reports (PN41)

The Employee Master Data Spreadsheet can be used to check data against SIMS.

If you have a discrepancy in salaries the following fields in this report can be checked against SIMS

- Grade/Level = Salary Range/point in SIMS
  - ie BP Range 2/12
- FTE Salary = FTE salary in SIMS
- FTE = Pay Factor in SIMS (not the FTE!)

NB a discrepancy up to .0025 is acceptable ie 86.59 in SAP .8647 in SIMS

- Actual amount = For teachers actual amount in SIMS

(BP does not display actual amounts as not on ranges)

- Weekly Hours = HR/week in SIMS
- TTO weeks + TTO holiday = Weeks/yr in SIMS
- Allowance = Allowance description in SIMS
- Amount (multiply by 12) - Allowance amount in SIMS

You should also check:

- your service terms are up to date and that you have the current award dates and figures
- Teachers – 1.9 20
- BP 1.4.20

- You do not have duplicate descriptions in any of pay ranges/scales as only one of these would ever be updated by the SIMS import files

School logo

Date: 03 March 2020

Employee Contract Change Confirmation Letter

Name: Mrs J Boswell
Employment Start Date: 01 Sep 2000
Contract Payroll No: 45678920
Role: Classroom Teacher

Please see below for latest Contract Information

Employment Type	Service Term	Contract Start Date	Contract End Date (if fixed Term)
Permanent	Teachers Main Scale	01 Sep 2000	

Contractual Hours and Weeks

Leave Entitlement relevant to staff on Bucks Pay

Contract Hours per week	Full Time Equivalent	Leave Entitlement
32.5000	1.0000	0.0000

Salary Information

Start Date	Pay Range	Pay Scale	Salary
01 Sep 2019	Teachers Main Salary Range	0.0	£35971

Allowance Information

Allowance Start Date	Allowance End	Allowance Type	Allowance Amount

SIMS Data Reports

- Three reports can be found via Reports/Run/Staff

- SIMS to SAP Data Cleanse Contracts xx/xx**
- SIMS to SAP Data Cleanse Personal xx/xx
- SIMS to SAP Data Collection xx/xx

The Contract and Personal report will give you current data on all you live staff.

The Data Collection report is for obtaining up-to-date information on your staff

** when running use ‘today’s date’ in the field. Do not tick accept all.

Not just data that causes errors.....

Technical issues

- SIMS database failure
  - Technical Support team are to rectify and notify HR Operations if it will impact payroll deadline
- New SIMS Server or support provider is changing
  - School's responsibility to inform HR Operations immediately
  - Technical Team to inform HR of new Server
- SIMS Server is turned off
  - The school server is to remain switched on at all times to allow the data extract to run.

- Server connectivity
    - **3rd party provider interaction**
    - Firewalls
- Server time or date out of sync with GMT

AVCO

- Upgrades
- Extract failures
- Change of roles
    - No access to AVCO to download files
    - Files being available to incorrect ‘user’

Contacting HR or the ICT Schools Team

For SIMS data entry:	For Contract, Payroll and Absence queries
ICT Schools Team 01296 383500 #1 ictschools@buckinghamshire.gov.uk	HR Service Desk 01296 382233 hrservicedesk@buckinghamshire.gov.uk

- Please check your HR changes Reports and Employee Data Reports before contacting HR.
- Please do not send emails direct to, or cc individuals relating to SIMS to SAP queries:
- All questions should be directed to one of the above teams, as appropriate.

HR SERVICE DESK NOTIFICATIONS - SUMMARY

Please email the HR Service desk if any of the following arise:

- Allowances: end date brought forward
- Changes to data where the SAP No or NI number was missing, resulting in an AVCO failure.
  Full details of the change being made must be email to HR.
- Change of Legal surname / forename (Documentation is required - see Schoolsweb)
- Extraneous Duties administration
- Head teacher salary changes (Ch. of Governors to confirm)
- HR Changes Report: any errors spotted or expected changes not reflected.

- All Maternity/Adoption administration (Documentation is required - see Schoolsweb)
- Protected Pay administration
- Senior Midday Supervisors (i.e. teachers who are paid an hourly rate) - changes
- Shift Allowance administration
- Suspensions without pay
- Member of staff has more than one contract. ‘Nil pay’ to be applied to one or more contracts but not all

Thank you for your time

Questions?