



helping  
schools  
inspire

# FMS 2019 Spring Release Note (FMS 6.186)






Including Accounts Receivable, Budget Planning and Equipment Register - version 1.0

Release Notes	2
Enhancements in FMS 6.186	2
Essential Information	2
Restoring Databases - FMS and SIMS	3
Version Support	3
Setup Information for Windows and Hosted Environments	3
Important Information About Windows 8, 10 and Windows Server 2012	4
Important Information Regarding FMS Documentation	4
Where to Find More Information	5
Appendix - National Insurance Tables 2019/2020	5

## Release Notes

Capita SIMS has made this release note available in PDF and Word formats. To take full advantage of the functionality available in this release note (e.g. links to handbooks and video tutorials), you must use the PDF version. Capita SIMS cannot be held responsible for any changes, errors or omissions resulting from subsequent editing of the supplied document.

Each functional area displays a set of icons, which indicate the school type(s) to which the content relates. Icons that indicate a link to the applicable handbook(s) and New Feature videos are also displayed.

-  Content applicable to Maintained schools
-  Content applicable to Academies
-  Content applicable to Independent schools
-  Link to the applicable handbook(s)
-  Link to a New Feature video

If you have any comments or questions regarding any SIMS user documentation, please email us ([publications@capita.co.uk](mailto:publications@capita.co.uk)).

## Enhancements in FMS 6.186

There are no new features provided as part of the FMS 2019 Spring Release.

### Consistent Financial Reporting



All the CFR reports have been updated to display the correct financial year.

**Expenditure E28 Bought-in professional services – other** has been split in 2018/19 as follows:

- **E28a : Bought-in professional services – other (except PFI)**
- **E28b : Bought-in professional services – other (PFI).**

On upgrade, all ledger codes mapped to E28 are mapped to E28a automatically. Where schools have a requirement to record expenditure against E28b, they should seek guidance from their LA support with regards to any additional ledger codes that will be required and the recording of any transactions.

Additionally, all validations have been updated in line with recent DfE specification updates.

### Provision of the Payment Analysis Report (Prompt Payments)



 Maintained/Independent schools

 Academies

[Reports](#) | [Accounts Payable](#) | [Supplier Analysis](#) | [Payment Analysis](#)

In conjunction with the Small Business, Enterprise and Employment Act 2015, UK companies must submit a report on a half-yearly basis detailing their payment practices, policies and performance for financial years beginning on or after 6 April 2017. To enable large Academies and Independent schools to comply with this requirement, the Payment Analysis report has been provided.

### National Insurance 2019/2020



National Insurance calculations have been updated to reflect recent changes by HMRC (please see *Appendix - National Insurance Tables 2019/2020* on page 5).

## Essential Information

**IMPORTANT NOTE:** This release is supported on Windows 8 and Windows 10.

To upgrade to FMS 6.186, your FMS system must satisfy the following criteria:

- Where Personnel Links are in use, SIMS must already be upgraded to a minimum of the SIMS 2018 Autumn Release (7.184) to enable Salary Projections to be generated.
- FMS must be at a minimum version of 6.184.

- If you use FDS, all of your FMS databases must be upgraded to a minimum version of FMS 6.184.
- FMS 6.186 should be applied to existing installations by running SOLUS on the SQL Server. Applying the upgrade by running SOLUS on an FMS workstation will cause the upgrade to fail and the database will be rolled back to the previous version. FMS must have been accessed on the Server at least once in order to create the [FMSConnect.ini](#) file required by the upgrade.

**IMPORTANT NOTE:** If you are performing an FMS upgrade spanning more than one release, it is essential that you read the release note associated with each version.

## Restoring Databases - FMS and SIMS

If you are using Personnel 7.180 (or later) to generate Salary Projections in FMS and you need to restore your SIMS database, you must restore the FMS system to the same point. This ensures that Salary Projections are calculated accurately and consistently. To facilitate this, you are strongly advised to always take a backup of both databases at the same time.

In the event that this advice is not followed and a subsequent case is raised with the Service Desk, we reserve the right to charge a fee for any corrective work to resolve the issue.

## Version Support

The FMS support arrangements depend on the supported versions of SIMS where Personnel Links is being used. Support for FMS is detailed in the following table.

Release	SIMS Version	FMS Version	FMS with Personnel Links/Equipment Register	FMS without Personnel Links/Equipment Register
Spring 2019	7.186	6.186	Supported	Supported
Autumn 2018	7.184	6.184	Supported	Supported
Summer 2018	7.182	6.182	Not supported	Supported

Release	SIMS Version	FMS Version	FMS with Personnel Links/Equipment Register	FMS without Personnel Links/Equipment Register
Spring 2018	7.180	6.180	Not supported	Supported

NOTE: FMS 6.186 has been tested against SQL Server 2012, 2014 and 2016.

## Setup Information for Windows and Hosted Environments

This section provides details of the activities that must be carried out on workstations running Microsoft® Windows 7, Windows 8 and Windows 10, and on Terminal Servers hosting FMS.

- From the FMS 2013 Spring Release, we included the Microsoft Report Viewer as part of the workstation upgrade process. This is used by various new reporting processes. If the Report Viewer upgrade is taking an excessive amount of time and you decide not to install it, you can save time by running the FMS workstation upgrade via the Command Line, using the [/NoReportViewer](#) switch. Taking this action means that you will have to install the Report Viewer at a later date.
- The [NET DIR](#) value of the Paradox Native Driver should be set to a writable per user location (i.e. a mapped drive) because users must have write permissions to this location. This value can be set via the BDE Administrator utility, available from the [Control Panel](#). This applies to Windows 7, Windows 8, Windows 10 and to Terminal Server Environments.
- The [Start In](#) field of the shortcut used to run FMS should be set to a writable per user location (i.e. [%localappdata%\temp](#)) because users must have write permissions to this location. This applies to Windows 7, Windows 8, Windows 10 and to Terminal Server Environments.
- On the [System Parameters](#) tab of the [Establishment Details](#) dialog in FMS (via [Tools | Establishment Details](#)), the transfer [Folder](#) should be set to a writable per school location if multiple schools share the same Terminal Server because users must have write permissions to this location. This applies to Terminal Server Environments.

- On the **Interfaces** tab of the **Establishment Details** dialog in FMS (via **Tools | Establishment Details**), the import and export locations should be set to a writable per user location if multiple schools share the same Terminal Server because users must have write permissions to this location. This applies to Terminal Server Environments.

## Important Information About Windows 8, 10 and Windows Server 2012

If you are running FMS on a Windows 8, Windows 10 or Windows Server 2012 workstation, you may encounter difficulties when attempting to open PDF files in FMS. This is caused by Windows Reader being the default program used to open PDF files.

To resolve this issue, you must first ensure that Adobe® Reader 10 or later is installed.

Next, you will need to associate Adobe Reader with all PDF files. From the Taskbar, click **File Explorer**, click **Computer** in the panel on the left-hand side of the page then from the Menu Bar, select **Computer | Open Control Panel**. Click **Programs | Default Programs | Associate a file type or protocol with a program**. In the **Extensions** list, scroll down to and click the **.pdf** item then click the **Change program** button. Click **Adobe Reader** then click the **Close** button.

## Important Information Regarding FMS Documentation

**IMPORTANT NOTE:** You might encounter issues when attempting to open any New Feature videos or Tutorials whereby you are asked to install the required version of Flash Player and/or an on-screen dialog suggests that Online Help content cannot be displayed. For more information, please click the following link (<http://helpx.adobe.com/acrobat/kb/known-issues-acrobat-xi-reader.html>).

These issues can be resolved by downloading the latest version of Flash Player (<https://helpx.adobe.com/flash-player.html>).

A search facility is available from the SIMS, FMS and Discover Documentation Centres. This enables you to locate information across the Documentation Centres or within individual resources (handbooks, release notes, FAQs, etc.). The search facility operates in a similar way to a Google search. To perform a search, enter one or more keywords in the search field (located at the top right-hand side of the Menu Bar) then click the **Search** (magnifying glass) button. You can use **\*** and **?** as wildcards. To search for an exact phrase, enclose more than one word in double quotes, e.g. **"debit card"**.

To access the **Documentation Centre**, selecting **Help | FMS Documentation**.

We would welcome any feedback you have on the **Documentation Centre**. If you have any comments, please email the SIMS Publications team ([publications@capita.co.uk](mailto:publications@capita.co.uk)).

User documentation that is accessible via the **Documentation Centre** is hosted on the web. This approach to delivering user documentation offers you the following benefits:

- A reduction in the download time of an FMS release from SOLUS
- We can provide user documentation post-release, so you will always have access to the most up-to-date, accurate information.

As a result, documentation provided in PDF format is not deployed to the **\Program Files\SIMS\FMSSQL** folder on the workstation (with the exception of the main **Documentation Centre** navigation page).

**NOTE:** If you wish to access the latest user documentation for the SIMS 2019 Spring Release without logging into SIMS, the **Documentation Centre** is accessible using a web link (<http://simspublications.com/281739/index.html>).

Help files are delivered to the **\Program Files\SIMS\FMSSQL** folder on each workstation.

**IMPORTANT NOTE:** If Google Chrome is your default Web browser, you must download PDF files instead of opening them in Chrome to ensure that PDF files display correctly. This is achieved by entering **chrome://settings** in the Address Bar then pressing **Enter**. Scroll to the bottom of the page and click **Advanced**. In the **Privacy and security** section, click **Content settings**. Scroll towards the bottom of the list, click **PDF documents** and move the **Download PDF files instead of automatically opening them in Chrome** slider to the on position.

If you experience a problem when attempting to open a page in the **Documentation Centre**, please contact your System Administrator who can enable access to [www.simspublications.com](http://www.simspublications.com).

Advice is provided if you enter [simspublications.com](https://simspublications.com) in the Address Bar of your Web browser. The **Documentation Centre** location changes with each release, indicated by a six-digit identifier. To ensure that you access the **Documentation Centre** relating to the version of FMS installed at your establishment, you are strongly advised to access it via **Help | FMS Documentation**.

If you require assistance with this or any other issue you encounter when attempting to access user documentation, please contact the SIMS Publications team ([publications@capita.co.uk](mailto:publications@capita.co.uk)).

## Where to Find More Information

### Via FMS...

For the software handbook, select **Help | FMS Documentation** to display the FMS **Documentation Centre** then click the required handbook title.

### Via My Account...

Documentation is also available from the My Account website (<https://myaccount.capita-cs.co.uk>).

1. Enter the required text in the **Search** field to display a list of documents that match the search criteria.
2. To refine the search further, click **Documents** and then select the required **Document type**, **File type** and/or **Date** range (click **Show more** to view additional options, if required).

Alternatively, click **SIMS Publications** (located in the **Popular Searches** list) to display a list of all SIMS publications.

The search results are displayed automatically.

### Tips for using the My Account Search Facility

Here are some key tips for using the search facility in My Account. For additional explanations, please refer to the My Account website.

NOTE: You no longer need to use + / - / "" when searching.

- Reduce the number of words you enter in the search field and use only key words, e.g. instead of entering **student showing as a contact**, search for the word **contact**.
- Use the **Product Type** filter to refine results further.
- Use the advanced filters located on the left-hand side of the **Search results** page.

If you are unable to obtain the required handbook using any of these methods, please email us ([publications@capita.co.uk](mailto:publications@capita.co.uk)) and we will be pleased to email a copy to you.

Handbooks are viewed and printed using Adobe® Reader version 10 or above.

## Appendix - National Insurance Tables 2019/2020

The following table shows the figures that should be entered in SIMS Personnel for employer contributions for National Insurance. The table is based on our interpretation of the Government's guidance on *Rates and thresholds for employers: 2019 to 2020*. This resource can be found at <https://www.gov.uk/guidance/rates-and-thresholds-for-employers-2019-to-2020>.

In summary, the columns in the following table are in the same format as the columns in the National Insurance table in SIMS Personnel.

Monthly Earnings			Employer Contribution	
Band	Upper	Lower	Contracted In Rate 1	Contracted Out Rate 2
1	512.00	0.00	0.00	0.00
2	719.00	512.01	0.00	0.00
3	4167.00	719.01	13.80	13.80
4	0.00	4167.01	13.80	13.80

NOTE: A 'rounding' difference of approximately £1-2 per month may arise for some employees.

If this table is entered in SIMS Personnel with a start date of 06/04/2019, the April 2019 National Insurance projections will be slightly different to those in the following months. To avoid this situation, enter the table with a start date of 01/04/2019.

## Personnel 7 - Supported Versions

The table needs to be entered via [Tools | Staff | National Insurance Rates](#). National Insurance projections will be calculated in FMS 6.184 or later once the Financial Year and Salary Periods have been defined for 2019/2020 and Salary Projections have been refreshed via [Focus | Personnel Links | Salary Projections](#).

## Export and Import of Pay Related Files - Minimum Version Summer 2018

The following table shows the supported combinations.

		Import (School)	
		Summer 2018 to Spring 2019 Salary Ranges <u>not</u> licensed	Summer 2018 to Spring 2019 Salary Ranges licensed
Export (Support Unit)	Summer 2018 to Spring 2019 Salary Ranges <u>not</u> licensed	Yes	Yes
	Summer 2018 to Spring 2019 Salary Ranges licensed	No	Yes

## Export and Import of Pay Related Files for National Insurance

SIMS Support Units can define the National Insurance table in SIMS Personnel 7.182 (SIMS 2018 Summer Release) or later via [Tools | Staff | National Insurance](#), and then include the National Insurance table in Pay Related files via [Tools | Staff | Pay Related Export](#).

The Pay Related file can be dispatched to schools that are using SIMS Personnel 7.182 (SIMS 2018 Summer Release) or later, where it can be imported via [Tools | Staff | Pay Related Import](#). When National Insurance tables are imported using this mechanism, all existing National Insurance tables are deleted whilst the National Insurance tables contained within the Pay Related file being imported are retained and used. Consequently, Support Units need to ensure that SIMS, from where the Pay Related file is exported, contains as a minimum the National Insurance table for 2018/2019 (this can be found in the FMS 6.180 release note), as well as the table for 2019/2020 (detailed earlier in this section). This will avoid any issues with the remaining FMS Salary Projections for 2018/2019. Financial years prior to 2018/2019 should now be closed in the majority of cases, with all the Salary Projections being replaced with the actual National Insurance payment.

## FMS Salary Projections 2019/2020

National Insurance projections will be calculated in FMS 6.184 (FMS 2018 Autumn Release) or later once the Financial Year and Salary Periods have been defined for 2019/2020 and Salary Projections have been refreshed via [Focus | Personnel Links | Salary Projections](#).