






Including Accounts Receivable, Budget Planning and Equipment Register - version 1.1

Release Notes	2
Enhancements in FMS 6.198	2
Essential Information	3
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 2021/2022	5

Release Notes

We have 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. We 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.com).

Enhancements in FMS 6.198

Consistent Financial Reporting (CFR)



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

Additional income rows have been provided for I18 - Income from additional grants for schools, as follows:

- **I18a** - Coronavirus Job Retention Scheme
- **I18b** - DfE grant scheme for exceptional costs due to COVID-19
- **I18c** - Other COVID-19 related grants
- **I18d** - Additional grant for schools.

On upgrade, any ledger codes previously mapped to I18 are mapped automatically to I18d for 2020/21.

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

Consistent Financial Reporting 2020/2021 Federated Flag



Federated schools receiving a single budget should submit their CFR 2020/2021 return collectively.

The lead school should select the **Is your school the hub school of a Federation?** check box on the report criteria screen. The balances for other schools within your Federation should be entered against the appropriate headings in the additional column on each tab. Finally, on the **Balances** tab against **B01**, add a note that provides details of the DfE Number of each additional school in your Federation, e.g. **2013456, 2015678, 2019876**,

Please note the following:

- The string of text must not contain spaces.
- The string of text must end with a comma (,).

For information on how to populate the CFR return to include the balances from all schools within your Federation, please contact your Local Authority.

National Insurance 2021/2022



National Insurance calculations have been updated to reflect recent changes by HMRC (please see *Appendix - National Insurance Tables 2021/2022* on page 5).

Essential Information

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

To upgrade to FMS 6.198, 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 2020 Autumn Release (7.196) to enable Salary Projections to be generated.
- FMS must be at a minimum version of 6.196.
- If you use FDS, all your FMS databases must be upgraded to a minimum version of FMS 6.196.
- FMS 6.198 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 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 7.192 (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.

If 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 2021	7.198	6.198	Supported	Supported
Autumn 2020	7.196	6.196	Supported	Supported
Summer 2020	7.194	6.194	Not supported	Supported
Spring 2020	7.192	6.192	Not supported	Supported

NOTE: FMS 6.198 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 later.
- 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

A wide range of documentation is available from the FMS **Documentation Centre**. The FMS **Documentation Centre** is accessed by selecting **Help | FMS Documentation**.

User documentation that is accessible via the FMS **Documentation Centre** is hosted on the web. Help files are delivered to the **\Program Files\SIMS\FMSSQL** folder on each workstation.

NOTE: If you wish to access the latest user documentation for the FMS 2021 Spring Release without logging into FMS, the **Documentation Centre** is accessible via the support portal (https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0036820).

We would welcome any feedback you have on the FMS **Documentation Centre**. If you have any comments, please email the SIMS Publications team (publications@capita.com).

The Documentation Centres can be accessed from within our products:

- In SIMS 7, click the **Documentation** button on the SIMS **Home Page** (via **Focus | Home Page**)
- In FMS, select **Help | FMS Documentation**
- In Discover, click the **?** button
- In Satellite products, click the **Help** link.

Alternatively, visit the SIMS User Documentation Hub (https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0037321), where you can access our range of Documentation Centres.

You do not have to log in to the support portal to access user documentation.

For the PDF editions of our video tutorials to display correctly, it was necessary to install Adobe Flash Player. Support for Adobe Flash Player ended on 31 December 2020. Consequently, we have migrated our range of video tutorials from PDF to MP4 format. They remain available from the FMS **Documentation Centre** on the support portal (https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0036820).

If you have any comments or questions regarding any SIMS user documentation, please email the SIMS Publications team (publications@capita.com). Alternatively, you can provide feedback on each Documentation Centre resource using the **Helpful?** and **Rate this article** functions. When giving feedback, please provide enough information for us to locate and investigate the issue.

Important information about using the FMS Documentation Centre

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 require assistance with this or any other issue you encounter when attempting to access user documentation, please contact the SIMS Publications team (publications@capita.com).

Where to Find More Information

Via FMS...

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

Via the Support Portal...

User documentation is also available from the support portal (<https://capitaswprod.service-now.com/csm>).

If you are unable to obtain the required handbook using any of these methods, please email us (publications@capita.com) and we will be pleased to send a copy to you.

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

Appendix - National Insurance Tables 2021/2022

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 guidance offered by the Institute of Chartered Accountants in England and Wales (ICAEW) on *Rates and thresholds for employers: 2021 to 2022*. This resource can be found at <https://www.icaew.com/insights/tax-news/2020/dec-2020/national-insurance-thresholds-for-2020-2021>.

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	520.00	0.00	0.00	0.00
2	737.00	520.01	0.00	0.00
3	4189.00	737.01	13.80	13.80
4	0.00	4189.01	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 06/04/2021, the April 2021 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 01/04/2021.

Personnel 7 - Supported Versions

The table needs to be entered via **Tools | Staff | National Insurance Rates**. National Insurance projections will be calculated in FMS 6.198 or later once the Financial Year and Salary Periods have been defined for 2021/2022 and Salary Projections have been refreshed via **Focus | Personnel Links | Salary Projections**.



Export and Import of Pay Related Files - Minimum Version Summer 2020

The following table shows the supported combinations.

		Import (School)	
		Summer 2020 to Spring 2021 Salary Ranges <u>not</u> licensed	Summer 2020 to Spring 2021 Salary Ranges licensed
Export (Support Unit)	Summer 2020 to Spring 2021 Salary Ranges <u>not</u> licensed	Yes	Yes
	Summer 2020 to Spring 2021 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 7.194 (SIMS 2020 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 7.194 (SIMS 2020 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 2020/2021, as well as the table for 2021/2022 (detailed earlier in this section). This will avoid any issues with the remaining FMS Salary Projections for 2020/2021. Financial years prior to 2020/2021 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 2021/2022

National Insurance projections will be calculated in FMS 6.194 (FMS 2020 Summer Release) or later once the Financial Year and Salary Periods have been defined for 2021/2022 and Salary Projections have been refreshed via [Focus | Personnel Links | Salary Projections](#).