

# FMS 6 Release Notes

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2023 Autumn release (version 6.214)

## IMPORTANT

These Release Notes are only correct as of 17/10/2023

## Welcome to the FMS Release

Please read these notes carefully before installing or upgrading your software. Do not attempt any installation or upgrade without first making a fully restorable backup of your SIMS system.

## Ideas Portal

Our ideas portal is the perfect place to raise any new ideas or enhancements to the existing functionality you may have. Take the opportunity to view, vote and promote ideas that you feel would make the most difference to your experience in FMS.

You can access the Ideas portal via the [support portal](#).

## NOTE

You must log in to the support portal to access the ideas portal

## Satisfaction Survey

The FMS Satisfaction Survey is your direct opportunity to feedback to the product team on your experiences and views of the software itself. The short questionnaire will give you the chance to detail your thoughts on the modules, rate the user experience and evaluate the latest additions. This can be completed anonymously should you wish.

You can access the satisfaction survey:

- **FMS6:** Tools | SIMS Satisfaction Survey
- **Online:** <https://www.ess-sims.co.uk/user-survey>
- [Support Portal](#) (You do not need to log in to the support portal to access the satisfaction survey.)

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## FMS Upgrade Support

Important Information – Please read before upgrading.

If you are performing an FMS upgrade spanning more than one release, you must read the release note associated with each version.

### **IMPORTANT**

For more support on performing the SIMS Upgrades please refer to the SIMS Upgrade support article.

## Upgrading using SOLUS

The SIMS Online Update Service (SOLUS) lets you download and run SIMS releases and patches online. This is achieved using SOLUS3.

For instructions on carrying out an upgrade with SOLUS3, please refer to the SOLUS3 for Schools or the SOLUS3 for Local Authorities handbook.

## Support for SQL Server

SIMS, FMS, Discover, Partnership Xchange, SOLUS, and InTouch run on SQL Server 2012, SQL Server 2014 and SQL Server 2016 SP3.

### **SQL2019 Update**

The SQL Migration tool has been updated to upgrade SIMS, FMS, Discover, Partnership Xchange, SOLUS, and InTouch to run on SQL 2019 and Windows Server 2019.

For more information on support for SQL Server and Windows environments, please refer to the [SIMS Minimum Hardware and Technical Roadmap](#) on the support portal.

## General

If your school uses both Fees Billing and FMS, then SIMS and FMS must be upgraded at the same time.

## Backing up SIMS and FMS

Where SIMS Personnel is used to generate Salary Projections in FMS, SIMS and FMS backups should be carried out at the same time. If one of the databases needs to be restored, the other database must be restored to the same point, i.e. if you restore the SIMS database, you must restore the FMS database to the same point and vice versa.

### **IMPORTANT**

Backups are no longer zipped, because of the number of issues caused by zipping backup files. Recent operating systems now allow the use of compressed folders, which are recommended for automatically compressing backups. Please refer to your operating system documentation for instructions on applying compression to a folder.

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## Where to Find More Information?

### Via FMS...

For the software handbooks, navigate to the FMS Home Page, then click the Documentation button to display the SIMS Documentation Centre.

### Via the Support Portal...

User documentation is also available from the [support portal](#).

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

## FMS Release Notes

The FMS support arrangements depend on the supported versions of SIMS where Personnel Links are 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 |
|-------------|--------------|-------------|---|--|
| Autumn 2023 | 7.214        | 6.214       | Supported                                   | Supported                                      |
| Summer 2023 | 7.212        | 6.212       | Supported                                   | Supported                                      |
| Spring 2023 | 7.210        | 6.210       | Supported                                   | Supported                                      |

## New features for FMS 6

### Education and Skills Funding Agency Statutory Accounts Return 2022/2023 <sup>NEW</sup>

[Applicable to Academies](#)

[Tools](#) | [General Ledger Setup](#) | [Tab 10. ESFA Mappings](#)

The ESFA Mapping Tab will be active if financial years start in September. The tab allows locally defined FMS6 ledger codes to be mapped to the published ESFA Account Codes. Once the local FMS ledger codes have been mapped, the available supporting reports will show where an FMS ledger code has been mapped to an ESFA Account Code, and identify FMS ledger code(s) that have not been mapped.

### Education and Skills Funding Agency (ESFA) Statutory Accounts Return 2023/2024 <sup>NEW</sup>

[Applicable to Academies](#)

[Tools](#) | [General Ledger Setup](#) | [Tab 10. ESFA Mappings](#)

The ESFA Account Codes have been revised with the following modifications:

- 44 new Account Codes have been made available.
- ESFA Account Code 845250 has been removed.

#### Note

If an FMS ledger code has been mapped in 2022/2023, it will have been unmapped on the upgrade and will need to be re-mapped to the appropriate ESFA Account Code.

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## Accounts Receivable redundant Bank Ledger codes **NEW**

Applicable to Academies; All Phases; All Regions; Independent and Maintained schools

The ability to hide redundant Bank Type Ledger Types has been extended to include transactional screens in Accounts Receivable detailed below:

- Accounts Receivable | Receipts | Direct Debit - Bank Account Field
- Accounts Receivable | Receipts | Standing Order - Bank Account Field
- Accounts Receivable | Refund Details - Bank Field
- Accounts Receivable | Manage Books | Paying In Slip