Business World
FAQs

Scottish Borders COUNCIL

PRE-GO LIVE FAQS   **Updated | 19 May 2017**

Business World is changing the way absolutely everyone in the Council does day-to-day tasks such as expenses, timesheets, booking leave, buying things and budgeting. It is replacing the three main systems that are used to manage our staff and finances - Resourcelink, FIS and Proactis - with a single modern, efficient and integrated system.

Business World go-live
The system went live throughout the day on 3 April. Staff who are on the Council Network and have access to IT (Council Admin IT) should now access the system either from the icon on their desktop or from a link on the intranet home page.

Functions including **updating personal information, requesting and approving expenses and procurement of goods and services** are available. As planned, other areas will be rolled out in due course. This includes the annual leave request and approval process which will be phased in after go live. In the meantime, staff should continue to use the current system in their department for annual leave requests and approval.

Staff who are not part of the Council Admin IT group (see below) should continue to work as they normally do **until advised otherwise**:
- Staff with a Glow email address only and access to curricular network PCs [curricular network only IT users]
- Staff who are currently non-ICT users at work [non-ICT users]
- Staff who use a partner (e.g. NHS) device [partner ICT users]

FAQs
The FAQs below are the most commonly asked questions received by the Project Team prior to Business World going live.

A set of Post Go-Live FAQs are also available which contain questions asked after the system went live on 3 April.

If you have any queries which are not answered below, please email: businessworld@scotborders.gov.uk

General
- **How do I access Business World?**
  If you are on the Council Network and have access to IT, you can access Business World either from the icon on your desktop or via a link on the intranet home page. If you are a general user, you will not need to log-in separately to the system.
  If you are a desktop user, you should use Internet Explorer rather than Chrome or other browser to access Business World.

- **Will emergency contacts be held in Business World, thus removing the need to hold the information on paper?**
  Yes - emergency contact information in will be held in BUSINESS WORLD as long as staff complete the emergency contact section. It will be for individual line managers to encourage their teams to complete this, as it will reduce the need for locally held paper-based records. Emergency contact information currently held in ResourceLink will migrate to Business World.

- **Will all existing personal and personnel data in ResourceLink be migrated to Business World e.g. emergency contacts, sickness records, training records etc?**
  Yes - that is the intention, although only a limited amount of historical data will be transferred into Business World with the rest being archived.

- **Will external consultants (Capital Projects Managers specifically), have access to Business World?**
  Managers will be able to add contractors/consultants and authorise the level of access.

- **When can we see what it looks like?**
  You can go to the Business World webpage where a selection of screen examples are available under the 'See How Business World will work' section.

- **Are non-office based staff being included in the communications?**
  All staff received a letter and leaflet from the Chief Executive in February. Departments should be ensuring that all non-office based staff are being sent the Staff and Manager Updates so that they are aware of what is happening and how it will impact on them.

- **Will the Hospitality Register be held in Business World, so staff can complete the form there?**
  This is not part of the system currently but will be considered for future development.

- **Will the Register of Interest be held in Business World so staff can complete it there?**
  This is not part of the system currently but will be considered for future development.

- **How is business travel insurance and associated documents for cars etc. recorded in Business World?**
  There is a section for employees to complete and automated alerts for managers can be set.

- **Will my Business World username be my full email address or just the first part of it i.e. will the @scotborders.gov.uk already be populated?**
  As Business World is initially only going to be available via Council Admin Network laptops/PCs, a separate login will not be required as there will be single sign on for general users of the system. This means that once you have logged in to your PC, you do not need to enter any further user-id or password. Once the roll-out expands, your user-id for Business World will be your employee number – more information will be provided about this in due course.

- **Is there a proxy role and if so, how will it be controlled?**
  There is a function in Business World that allows you to create a **substitute** when you are on leave or away for a period of time although you will only be able to select from a predefined list of users. This is to ensure the robustness of internal controls as only appropriately authorised staff members will be given permissions. For general users there is unlikely to be a requirement to have a substitute. If you have the Line Manager Role with staff management responsibilities in Business World, or the SB Manager Role with staff and financial management responsibilities, it is **crucial** that you select a substitute when you

are on leave. NB: there is no planned functionality for a proxy that would be used in the system to enable ongoing delegation of your responsibilities.

- **Will FIS, Proactis and Resource link still be available for viewing purposes after go-live?**
  The Council has a requirement to retain key financial and HR data for specific periods of time as per our records management policy. We will be archiving the data, although the solution to achieve this has not yet been implemented. In the meantime, read-only access to Proactis, FIS and Resourcelink will be made available for key officers.
- **Can support role staff run reports on budgets that aren't 'ours' i.e. if our post is not in the Scheme of Delegation e.g. managers can currently ask staff to run reports for them from Proactis/FIS etc and staff are able to do this because they have the access rights. Will this still be the case or will managers have to run their own reports?**
  The whole point of Business World is around self-service and the reports that have, and are being developed, are to enable staff and financial management reporting to be run by the manager making the request within the system. The reports are available on a specific reporting menu within Business World and accessing them should require little assistance after this has been done for the first time.

Finance

- **We recognise the support we receive from Finance as being crucial to aid us in managing our budgets. What will that support look like once Business World is implemented?**
  Business World is being implemented to allow a step change in the way that financial information is accessed by managers. This will enable Finance to provide more effective support to managers around decision making and budget setting. Initially Finance will also be spending a significant amount of time supporting managers with financial management activities in Business World.
- **Will the process for banking low value items change in Business World e.g. my section sells green dog walkers merchandise, booklets for the ranger service etc which cost less than £10.00? Payment is normally received by cash/cheque.**
  This process will not change in Business World. No invoices should be raised for debts under £10.00.
- **How will invoices be authorised? Will they go to the budget holder?**
  Purchase Orders will be authorised in accordance with the Scheme of Delegation for cost centres. Once the goods/services are received, the goods receipting process should be undertaken in Business World. This receipting role will be available to all users in the system. Where the goods received equal the invoice within a small tolerance (to be agreed corporately) and within the value authorised by the purchase authoriser, the invoice will automatically be processed for payment. Mismatches will go into a form of troubleshooting.
- **How will petty cash be processed in Business World? Will we still get cash for Social Work client section payments?**
  The process for petty cash claims will change as a result of Business World rollout. However, there are no changes being made to the values and use of petty cash. You can read more about the changes in the Business World Staff Update Issue 1 sent on 9 March. Contact the Project Team if you would like us to resend you that information.
- **We are aware that budget managers will be provided with the functionality to self-serve for budget monitoring. To what level can a**

manager drill down to within a budget code?
There will be two types of reports for Budget Managers within Business World. One is a fixed format report which is created in Excel and is intended as the formal reporting format for budget managers. Business World also provides the ability to have online report enquiries which have the ability to track through figures to their original source transactions.

- **What will a manager receive/see with regard to financial statements /projected outturn?**
  Reporting of financial actuals and forecasting has been developed. Finance will be working with budget managers to ensure their full understanding over the next few months, post go-live.

- **Will FIS (and Proactis/ Resourcelink still be available for viewing purposes after go-live?**
  The Council has a requirement to retain key financial and HR data for specific periods of time as per our records management policy. We will be archiving the data, although the solution to achieve this has not yet been implemented. In the meantime, read-only access to Proactis, FIS and Resourcelink will be made available for key officers.

- **Will Cognos reports still be available and if not, what will replace them? I use them to pull information together to compile LEADER claim for Scottish Government.**
  Cognos is still being retained by the Council and will be available to report on historical financial information for transactions up to the year ending 31 March 2017. In the future, the focus for Cognos will be to provide and integrated 'business intelligence' reporting function, which is about connecting data between different systems used by the Council.

Training | [SBLearn](#)

- **Will external training courses be available in the HR module, or is it for internal courses only?**
  Only internal courses i.e. those which have been organised by SBC will be available in the HR module of Business World. See [Demo](#) for booking internal training.

- **How will I book external training courses and how will it (attendance) be logged on my record in Business World?**
  External training will be booked through the normal procurement part of Business World. You will be able to update your own training record through the 'Your Development' section of Business World.

- **Will mandatory training be linked to the posts of specific staff groups i.e. plant/ manual/ food training for labourers/operatives/catering staff etc.?**
  As the system is developed, mandatory training required for specific roles will be listed in the appraisal section.

- **If mandatory training is linked to the relevant posts, will there be an 'alert' when certificate renewals, refresher training etc are due?**
  It will be possible to set up reminders on Business World to tell you when your certificates or mandatory training is going to expire. Some of these reminders will be set up on the system when it goes live, and others will be added as the data set on Business World grows. If you have a training requirement or certificate that requires a reminder, and you're not sure if it's been set up already, contact training@scotborders.gov.uk

HR | payroll, leave, recruitment, absence, flexi, PVG

- **How much historical sickness information will be brought over to Business World?**
  At least one year's worth of sickness information will be migrated over. This will allow for consistency and management of absence triggers.

- **Will we still get paper payslips?**
  Payslips for staff who do not have access to a Council PC or laptop will continue. However, the intention is to eventually remove the need to print monthly payslips as this saves the Council money and is more environmentally friendly.

- **Will all HR forms i.e. notification of change/ leavers/ appointments be done paperless in Business World?**
  These processes will be initiated in Business World and are subject to the workflow approval processes. This follows the Scheme of Delegation and organisational line management structures. A link with My Job Scotland's recruitment portal (Talentlink) is in development to remove the re-keying of data between the systems for new recruits. From a manager's perspective, the process will be paperless.

- **Who enters sick days - individuals or line managers?**
  Line managers will input information on absence due to illness - this is no different to the current process. The Business world process is more efficient than the current process however, as the system is automatically updated following the receipt of the notification of absence and information does not require re-keying by staff. In addition, line managers will receive an alert in Business World's task box to remember to do return-to-work activities.

- **Can emergency/retrospective holidays be requested verbally and then requested retrospectively on the system? If so, what is the window for this?**
  It is possible to retrospectively enter a holiday request within Business World and there is no cut-off date on retrospective holiday approvals. The logging and approval of holidays within the system is to support managers, so it is in their interest to ensure that decisions made outwith the workflow process are inputted as soon as possible.
  Each manager can agree with their team on how they wish to manage verbal approvals. However, with Business World being available through an internet link which can be accessed from home IT and Smartphones, it should be possible to log the emergency request on the system, irrespective of whether you are in the office or not.

- **Why do holidays have to be logged centrally now? At the moment we track holidays within the team.**
  There are several benefits to using Business World to manage leave across the Council:
  1. Managing annual and special leave within Business World means that individual annual leave entitlement is automatically calculated in line with the Council's annual leave policy and is linked to an individual's contract hours and work pattern. This means that there is accuracy and consistency across SBC in the handling of annual and special leave.
  2. The use of Business World means that we remove the many and varied approaches to tracking leave that currently exist, including multiple spreadsheets which still don't give senior managers an overview of the effectiveness of leave management within their teams.
  3. We will no longer be printing annual leave cards which will save money and trees.
  4. The use of Business World to record leave also means that we will no longer have to do a time consuming annual sampling of staff leave outstanding at

the end of the financial year. This will be managed and maintained within Business World.

5. It will be possible for managers to run a report to view all leave (annual, special and sickness) for any team that they manage.

- **Will unpaid leave (including term-time workers) be recorded in Business World?**
  All staff, including term-time contracted staff, will request paid or unpaid special leave through Business World in the same way as annual leave is requested. Term-time contracted staff will not be required to complete school holiday based annual leave as this will be automatically populated.

- **Will holiday entitlement be worked out hourly in Business World for all staff?**
  Currently, some staff are given their leave entitlement in days and some in hours, depending on their working patterns. In Business World, holiday entitlement will be worked out based on the contracted hours and work patterns, with both the number of hours and the equivalent of this in days being shown.

- **Will there be a pro-rata calculation done in the new system for staff who have already had holidays?**
  No - individuals will have to enter any holidays they have already taken from January 2017.

- **How are references handled in Business World when someone is appointed? How do we know when someone is approved and all pre-employment checks are in place?**
  The current process for handling references will remain the same as this is done through TalentLink, not Business World.

- **Can we amend annual leave days to flexi (and vice versa) once approved?**
  Yes - you can cancel a leave request and request leave as a different type of leave.

- **What happens with temporary staff contracts that are due to expire on 15 April and we still don't know if these will be extended? Will they extend automatically to 15 April 2017 or do managers have to do something?**
  The current dates in ResourceLink will migrate over with work ongoing to capture those dates. Once we move to Business World, managers will receive eight and four week reminders regarding temporary contracts that are due to expire. However, when temporary contracts are due to expire and contracts are to be extended, managers will have to extend them. There will be no automatic roll-over as there is at the moment - if staff remain in post after the contract has expired, they will not be paid.

- **How do staff get confirmation of a change in contract?**
  The current process for notifying staff of a change to their contract remains the same with correspondence coming from HR.

- **Does the carry forward of annual leave get entered into Business World, or is it just your allocated days/hours?**
  This year, any carry forward not already used will need to be entered into Business World, as we are part-way through the leave year. In future however, a carry over of up to five days will be automatic.

- **Will Health & Safety and Occupational Health information be linked to the relevant posts in Business World i.e. the equipment manual workers use (HAVS) and what tests/checks they have to have on a recurring basis i.e. audiology etc? If so, will there be the ability to record the test/check results and have an 'alert' in place for follow-ups or for scheduled recurring tests? Some tests may need to be carried out every**

three years – could the system 'alert' us to when the three years is about to expire?

The Occupational Health system (OHIO) is not part of Business World. However, work carried out to develop self service will include rolling out OHIO for managers to use directly. This will enable managers to set up HAVS and reminders within the OHIO system.

- **Does Business World have a 'Team Calendar' so that managers can see at a glance who in the team is off when, or will it only show direct reports?**
  Business World does have a team calendar but this shows only direct reports.

- **What parts, if any, of the current vacancy process will be affected by Business World e.g. will there be any changes to the current process for completing/submitting a vacancy notification form or ARA?**
  Business World will not replace the current system for recruitment.

- **How will changes to establishment be carried out in Business World? Are there financial controls so that you can't exceed available hours in post or exceed your budget i.e. if I have a vacancy for 30 hours at grade 4, I can't appoint to this for 35 hours?**
  Business World has controls in place to ensure appointments cannot go over establishment.

- **Who will use Business World from day one to record leave (including flexi) and sickness absence?**
  See Business World Staff Update Issue 2 of 21 March for information relating to who will use Business World from day one and the structured implementation of the system. Contact the Project Team if you would like this resent to you.

- **Will all payslips on the current system be transferred over to Business World?**
  No, payslips will not transfer and we are currently exploring how these may still be accessed. Further information will follow.

- **Is flexi-time to be recorded in Business World i.e. we currently complete a 'Flexible Working Hours Record' document as per HR guidelines - will this document now be held in Business World?**
  No, flexi-sheets will not be held in Business World and you will continue to complete the 'Flexible Working Hours Record' as you currently do. However, flexi-leave will be requested through Business World.

- **How will timesheets for long and short-term supply be managed in the system as there is different coding under Devolved School Management and also different pay rates?**
  When entering timesheets, supply teachers will be required to select whether they are working on a short or long term supply basis. The approval of the correct rate will form part of the budget holder approval for the timesheet to be paid.

- **Will Resourcelink (and FIS/ Proactis) still be available for viewing purposes after go-live?**
  The Council has a requirement to retain key financial and HR data for specific periods of time as per our records management policy. We will be archiving the data, although the solution to achieve this has not yet been implemented. In the meantime, read-only access to Proactis, FIS and Resourcelink will be made available for key officers.

- **Can PVG be recorded in Business World? Will it flag up when this is due for renewal? Regular update checks (every three years) are carried out for Social Work, Transport Sevices etc. Does Business World record the date of the PVG so that these sections know when the update checks are required?**

PVG will be recorded in Business World and any information currently held in ResourceLink will migrate over to Business World. The introduction of the PVG scheme no longer requires updates, as once on the PVG system, a person remains on it indefinitely, until they leave that employment. This means that there is no requirement for alerts.

- **What happens when you have two line managers e.g. one in relation to work aspects/1-1, PRD while the other deals with HR matters?**
  If you are in two or more different posts in the Council, you will have more than one position in Business World. You will therefore initiate or receive processes within Business World for each position held and that position will determine which line manager the activity automatically moves onto. The only circumstance in Business World where you could have two line managers is where you report into a single post that has two occupants. In this situation, because workflow roles are attached to **positions** in Business World, not people, then it would go to both people in the position. If you believe your circumstances are different to either of the above scenarios, email businessworld@scotborders.gov.uk explaining your specific situation and we will look into it for you.

Purchasing and Procurement | Proactis, ordering

- **What will the new format be for supplier IDs?**
  The supplier ID is six digits beginning with 5.
- **Currently in school kitchens the cooks do the ordering. Will they now have to do this directly through Business World?**
  Yes, products with the catering suppliers will be online and able to be requistioned through Business World. If a school currently inputs orders directly into Proactis, then they will use Business World from the outset. If not, then they will continue with the current processes that are in place, until told otherwise. For staff who do not currently have ready access to IT, a sub-project is looking at this in detail. Updates will be provided as that work progresses. The work will also be looking at individual needs to ensure that appropriate tailored support is provided.
- **With Proactis orders that have been raised for rental over five years e.g. Konica will these all be carried over to Business World or will they need closed and new orders raised? If being carried over, what happens to the order number? Does it remain the same or does it change? If it changes, who is responsible for advising the supplier of the new order number?**
  All open orders (including those raised a number of years ago and carried forward each year) will be carried forward to Business World with the existing order number. There will not be any of the order history carried forward, only the current outstanding order amount.
- **The Catering Service use an Asda store card to purchase items required for some Catering Functions. This card is topped up to the value of £500 when required. An order is raised by Chief Executives support team and approved in Proactis. The cheque is issued directly to a member of the Catering Team, who takes it into Asda to get the store card topped up. Will this process be the same in Business World?**
  This request will be managed through a new payment type known as a sundry payment. A form will be available to complete with the details. In the longer term it may be that a purchase card is a better way to manage this type of spend. It is being initially being implemented on a limited basis, with a review in due course to consider to a wider roll out.
- **Will Proactis (and FIS/ Resourcelink) still be available for viewing purposes after go-live?**

transformation
MODERNISING THE WAY WE WORK

The Council has a requirement to retain key financial and HR data for specific periods of time as per our records management policy. We will be archiving the data, although the solution to achieve this has not yet been implemented. In the meantime, read-only access to Proactis, FIS and Resourcelink will be made available for key officers.

Schools

What reports will replace the current school workbooks and when will staff have sight of these?

In line with the Council's approach to Business World, standard management reports will be produced and automatically issued to headteachers in the same way as any other budget manager within the Council. Format and layout of these reports will be available during training and familiarisation of the new system.