



Schools Cash Office
Income Administration Software

Schools Cash Office

How to configure the dynamic link to SIMS.net (and import absences)



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1. About this document

This document is designed for new and existing users of Schools Cash Office (SCO). It gives detailed instructions on how to configure a Dynamic Link to SIMS.net to automatically import and update pupil data from SIMS.net into SCO. New pupils will be added and existing pupils' details will be updated e.g. address, class, free school meal status.

Please note that the Dynamic Link to SIMS.net does **NOT** delete leavers in SCO. Pupils are deleted in SCO in a controlled way either at end of academic year or manually via Pupil Configuration.

This document also explains how to configure the Dynamic Link to import absences from SIMS.net if you are using the SCO Dinner Money module.

We recommend you read through this document prior to configuring the dynamic link.

2. Before you start

2.1 Pre-requisite details

The following is a list of system setup pre-requisites in order to use the dynamic link to SIMS.net:

- You must have SCO version 2.4 installed on your client PC used to import pupil data (check this in SCO via the **Admin** screen, **System Status Report** - ensure that the SCO version starts with 2.4).
- SIMS.net must be installed locally on the PC used to import pupil data into SCO via the dynamic link. The dynamic link **cannot** be configured with centrally hosted SIMS.net.
- The dynamic link to SIMS.net is not compatible with schools using third party cashless links with alias/alternate account numbers.
- You may need a new licence key to use the SIMS.net functionality. Please email support@tucasi.com to request the licence key if it hasn't already been provided.
- SCO must be configured with a SIMS logon username and password. This username must be a member of the '**Third Party Reporter, Admin Assistant and Personnel Officer**' Groups in SIMS.net. Please follow the instructions in this document.

Notes:

- The username does not have to be the username of the actual user performing the configuration, for example, it could be an existing SIMS.net administrator username.
- If a new username is added in SIMS.net, ensure the with effect date for the permissions are added is before today's date otherwise you will have to wait 24 hours to update its settings.
- Only those PCs that will be used to import pupil data into SCO via the dynamic link need to be configured.

2.2 Changing import file settings (IMPORTANT)

New SCO Schools

In SCO, click on the **Accounts** tab to check whether pupil data has been imported. If pupil data has not yet been imported into SCO (typically if your school has just installed SCO) – please skip this section and proceed to step 2.3.

Existing SCO users - IMPORTANT

Pupil data may have previously been imported into the system using the UPN (Unique Pupil Number), Admission Number or SIMS ID as a Pupil ID.

To check the current format of the Pupil ID in SCO, click on the **Accounts** tab and view the **Pupil ID** column.

UPN	e.g. X123456789123
Admission Number (with / without leading zeros)	e.g. 001234 / 1234
SIMS ID	e.g. 6789

The default setting that the dynamic link uses is **SIMS ID** as the Pupil ID.

Before you run an import via the dynamic link you must check that System options have been configured to the relevant ID:

To continue using the SIMS ID as the Pupil ID, do the following:

- Click on the **Configuration** tab.
- Select **System Options**.
- On the **General** tab ensure that **Pupil ID field used for imports** is set to **PupilID**.
- Click on **Done**.

To retain the UPN as the Pupil ID, do the following:

- Click on the **Configuration** tab.
- Select **System Options**.
- On the **General** tab ensure that **Pupil ID field used for imports** is set to **UPN**.
- Click on **Done**.

To retain the Admission Number as the Pupil ID, do the following:

- Click on the **Configuration** tab.
- Select **System Options**.
- On the **General** tab ensure that **Pupil ID field used for imports** is set to **AdmissionNumber**.
- Click on **Done**.

Note: it is possible to change UPNs or Admission Numbers into SIMS IDs. Please contact support@tucasi.com for more assistance.

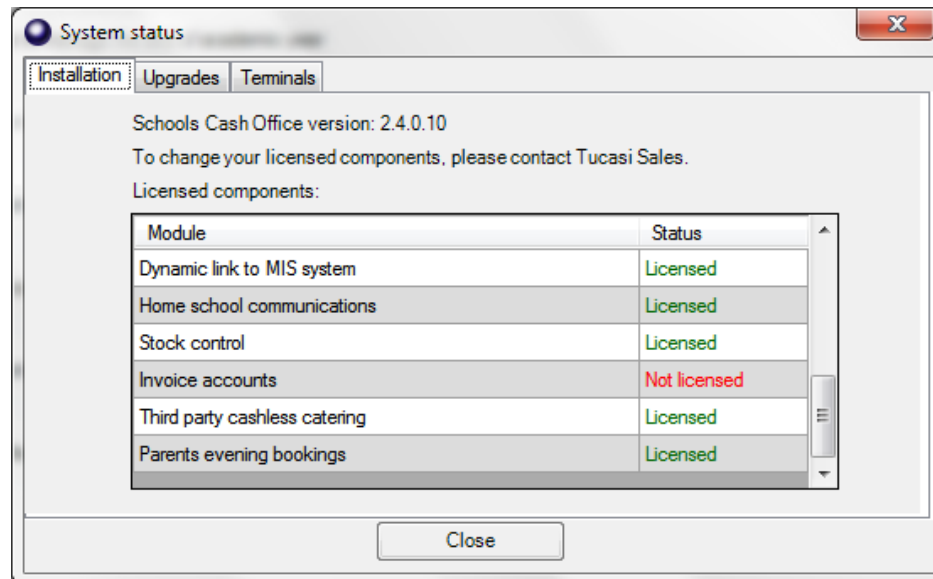
2.3 Checking the SCO licence key

To use the SCO Dynamic Link to SIMS.net, you **must** be licensed for the correct components.

To check the licence key in SCO:

- Log on to SCO with your username and password.
- On the **Admin** screen, select **System status report**.

On the **Installation** tab, check that the Status for the **Dynamic link to MIS** system displays '**Licensed**'.



- If not, please contact Tucasi Customer Support who will assign the relevant licence key for you.
- Click **Close** to close the System status dialog box.

2.4 Setting Pupil ID

Before you configure the dynamic link you need to set the Pupil ID in SCO:

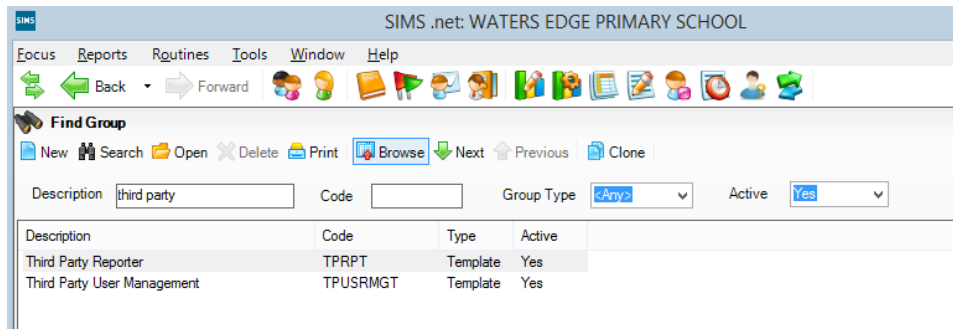
- Click on the **Configuration** tab.
- Select **System Options**.
- On the **General** tab ensure that **Pupil ID field used for imports** is set to **PupilID**.
- Click on **Done**.

2.5 Assigning a user to the SIMS.net group

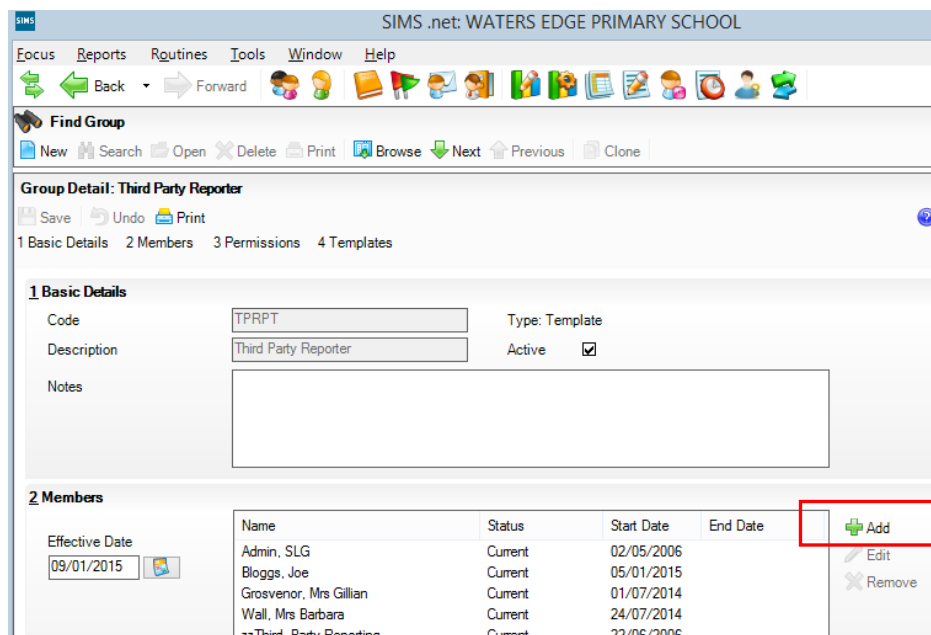
In order for data to transfer from SIMS.net into SCO, users should be members of the **Third Party Reporter**, **Administration Assistant** and **Personnel Officer** access rights groups for SIMS.net.

To add these permissions:

- Log on to SIMS.net as a user with **Administrator** privileges.
- Select **Focus**, click **System Manager**, select **Manage Groups** (if the System Manager or Manage Groups options do not appear, you will need to confer with your SIMS manager).
- Search for **Third Party Reporter Group**.



- Double click **Third Party Reporter**.



- Within the **Members** section, click **Add**.
- Search for the User name. From the bottom half of the screen, highlight the user you wish to add and click **OK**. The user name will appear in the **Members** section.
- Click **Close** to exit the Group screen.
- Click **Yes** to save changes.
- Repeat the above process for the **Administration Assistant** User Group and **Personnel Officer** User Group.
- **Exit** SIMS.net.

3. Configuring imports

3.1 Configuration options

There are two preferred options for configuring the automatic import of data into SCO. You should consider which type of import is most suitable for your school before proceeding to the next section:

a. Import Data on Demand

This type of import is controlled manually by the SCO user and can be carried out at any time as and when required by pressing a button in SCO. This is the preferred option for secondary schools.

b. Import Data on SCO Start-up

This type of import is configured to occur automatically every time SCO is started, or when the dinners tab is selected in SCO. The import will happen when SCO is started and may take a few minutes to update the pupil data before SCO can be used. This import will ensure that pupils' Free School Meal Status is updated every day and is the preferred option for primary schools using the SCO Dinner Money module, and secondary schools using the Tucasi cashless catering system.

For any of the above options, the following data can be imported automatically:

- Pupil
- Staff
- Cohorts/Sets
- Photos
- Attendance
- Pupil contacts
- Staff contacts
- Leavers

For pupil data, the following fields are imported:

- Surname
- Forename
- Date of Birth
- Pupil ID
- Address
- Registration Group
- Year Group
- FSM Eligibility and End Date
- Dietary Needs
- Parental Salutation
- Telephone
- Email
- Gender

Contact details for the Communications module:

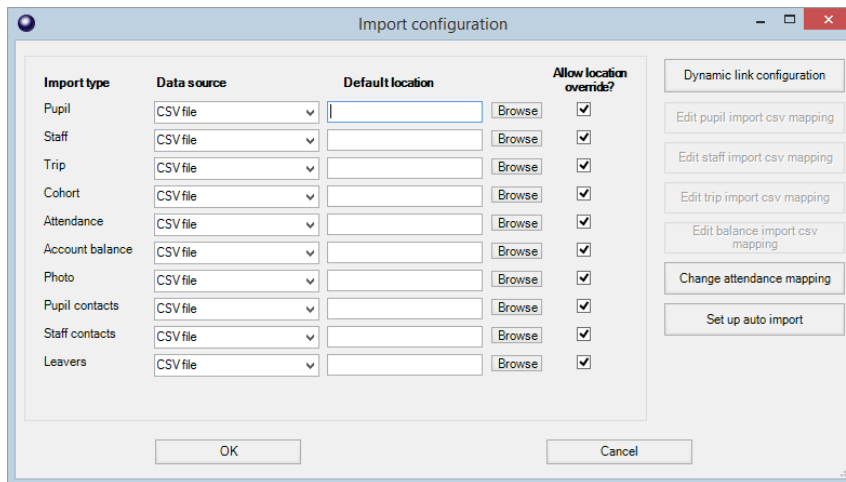
- Pupil ID
- (Contact)FirstName
- (Contact)LastName
- ContactID
- (Contact)PhoneNumber
- (Contact)MobileNumber
- (Contact)Priority
- (Contact)EmailAddress

3.2 Dynamic link configuration

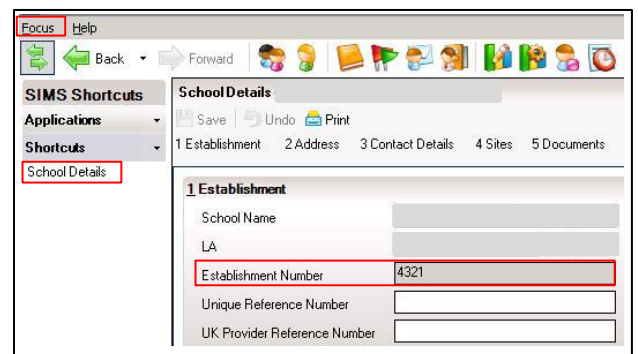
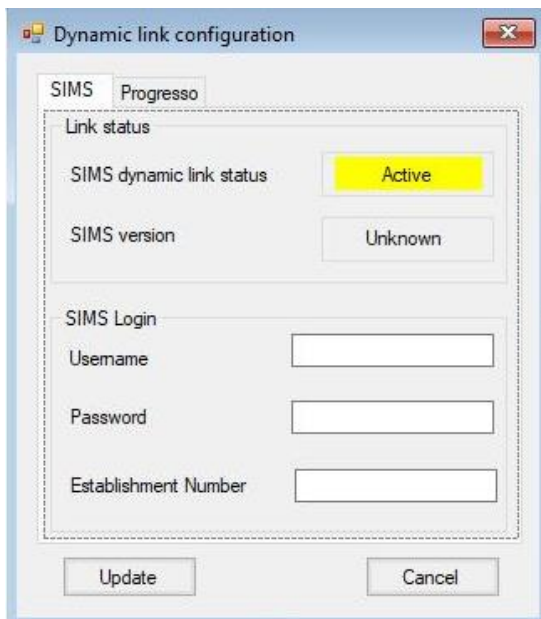
All schools must carry out the following to establish the link between SCO and SIMS.net:

- Start SCO.
- On the **Configuration** screen, select **Import from external system**.
- On the **Select import type** screen, click **Import configuration**.

The **Import configuration** screen opens.



- Click on the **Dynamic link configuration** button to the top right of the screen.
- Enter the SIMS.net **Username** and **Password** of the SIMS.net user that was added to the Third Party Reporting group in System Manager.
- Enter the **Establishment Number** (copy this from SIMS, Focus, School Details, Establishment Number).



- Click **Update**.

It is now necessary to configure the types of data you wish to import via the link from SIMS.net, for example Pupils and Staff.

IMPORTANT: for any other data type imports please contact Customer Support or discuss this with your Trainer.

- Select the **Data source** for **Pupil**.
- From the **Data source** drop down next to **Pupil**, select **SIMS dynamic link**.

The screenshot shows a table with two columns: 'Import type' and 'Data source'. The 'Import type' column has three rows: 'Pupil', 'Staff', and 'Trip'. The 'Data source' column has three dropdown menus. The first dropdown menu, corresponding to 'Pupil', is open and shows three options: 'CSV file', 'SIMS dynamic link', and another 'CSV file' option. The 'SIMS dynamic link' option is highlighted in blue.

Once you have specified which data to import, you must now tell the system how often to import it.

To manually import pupil data as and when required, proceed to step 3.2.2.

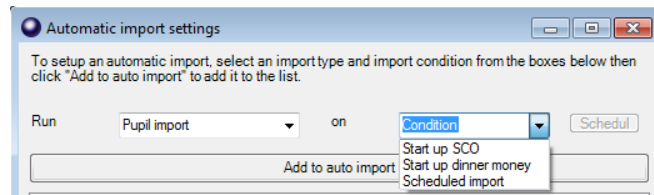
To automatically import from SIMS.net, proceed to step 3.2.1.

3.2.1 Schedule an import on SCO start-up

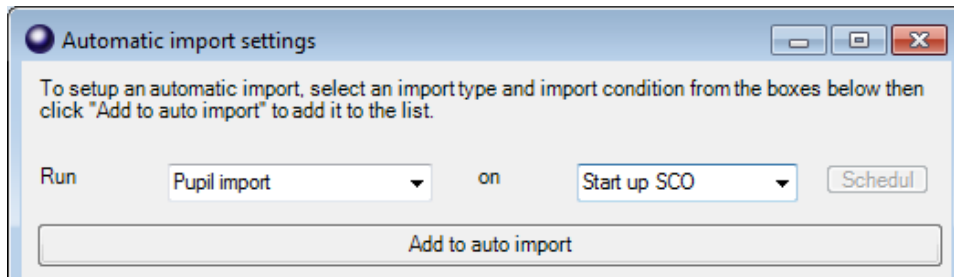
- In SCO, on the **Configuration** screen, select **Import from external system**.
- Select **Import configuration**.
- Click on the **Set up auto import** button.
- Select the **Import type** from the drop down list.

The screenshot shows a dialog box titled 'Automatic import settings'. It contains a text area with instructions: 'To setup an automatic import, select an import type and import condition from the boxes below then click "Add to auto import" to add it to the list.' Below the text area, there are two dropdown menus: 'Import type' and 'Condition'. The 'Import type' dropdown menu is open and shows a list of options: 'Pupil import', 'Staff import', 'Trip import', 'Cohort import', 'Attendance data import', 'Account balance import', 'Photo import', 'Pupil contact import', 'Staff contact import', and 'Pupil leavers import'. To the right of the 'Condition' dropdown menu is a 'Schedule' button. Below the dropdown menus is a text input field labeled 'Add to auto import'. At the bottom of the dialog box, there are three buttons: 'Remove from auto import', 'OK', and 'Cancel'.

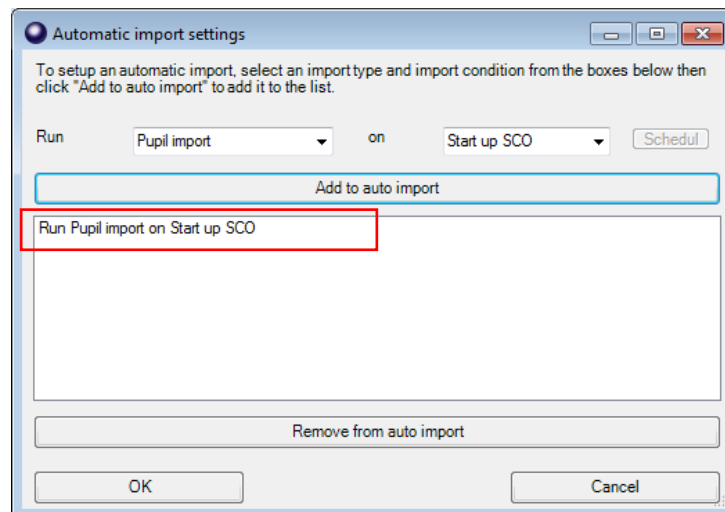
- From the **Condition** drop down list, select when you want the import to be run:
 - For SCO to be updated each time you log into it, select **Start up SCO**.



- For SCO to be updated after you log in and click on the **Dinners** tab, select **Start up dinner money**.
- Once the required **Import type** and **Condition** have been selected, click **Add to auto import**.

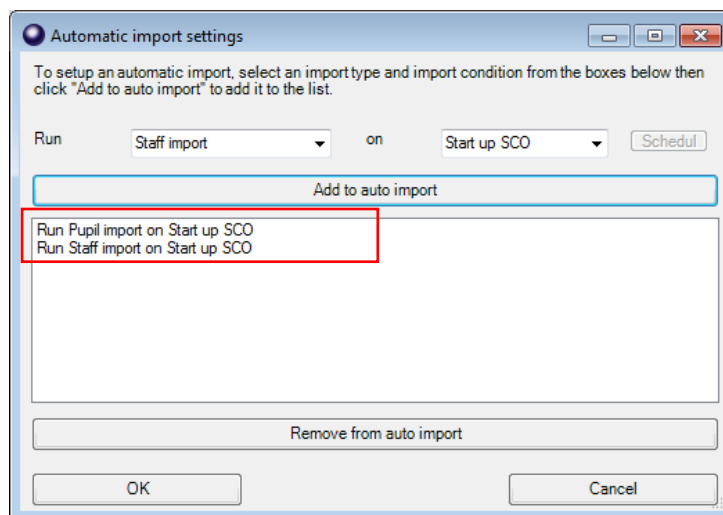


The instruction will be added to the panel below.



Repeat this process for any additional import types such as **Staff import** so that these will also import from SIMS.net as specified.

IMPORTANT: if you wish to import other data types, e.g. Cohorts or Photos please discuss this with your Trainer or contact Customer Support.



- Once the required imports have been added, click **OK** to return to the **Import configuration** screen.
- Click **OK** to exit.
- Click **Close** to exit the **Import from external system** screen.
- Exit SCO.

Note: when SCO is started each day, the pupil data will be updated automatically. The screen may take sometime to show any response – please be patient.

3.2.2 *To manually trigger an import (on demand)*

- Start SCO.
- On the **Configuration** screen, select **Import from external system**.
- Click **Pupil Import** (or whichever import is required). The screen may take sometime to show any response – please be patient.
- Ensure that no data discrepancies are identified and click **Confirm**.
- The import will be carried out and the pupil data will be updated (see further information below).

3.3 *View pupil data*

View the imported data on the **Accounts** screen. Pupil records will have been created for all pupils found in SIMS.net.

If you have opted to import staff details from SIMS.net, click the **View staff** button at the bottom of the **Accounts** screen to display staff details.

Click the **View pupils** button to return to the list of pupil accounts.

4. How to import absences from SIMS.net

This section explains how to configure the Dynamic Link to import absences from SIMS.net if you are using the SCO Dinner Money module.

The Dynamic Link first be configured for pupil imports, as described above, on the PC that will be used to import absences.

4.1 Configuration options

There are two preferred options for configuring the automatic import of absences into SCO. You should consider which type of import is most suitable for your school before proceeding to the next section:

a. Import Data on Demand

This type of import is controlled manually by the SCO user and can be carried out at any time as and when required by pressing a button in SCO.

b. Import Data on SCO Startup

This type of import is configured to occur automatically every time SCO is started, or when the dinners tab is selected in SCO. The import will happen when SCO is started and may take a few minutes to update the pupil absences before SCO can be used. This import is the preferred option for primary schools using the SCO Dinner Money.

For any of the above options, the following data can be imported automatically:

- Any absence codes that are mapped in SCO from SIMS.net

4.2 Import configuration

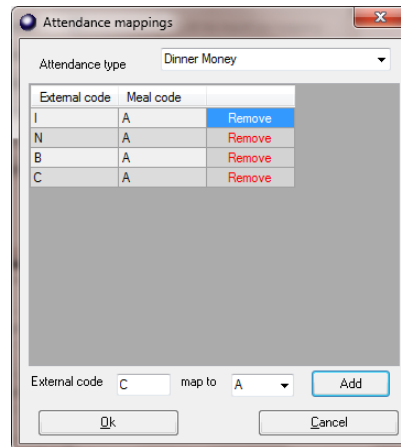
Any codes that are used in SIMS.net to record absences can be mapped to codes in SCO. If a single absence code is used in SCO, then all SIMS.net absence codes will need to be mapped to the one code. If more than one code is used in SCO, then the appropriate SIMS.net codes will need to be mapped to the relevant SCO code(s).

4.2.1 Mapping attendance codes

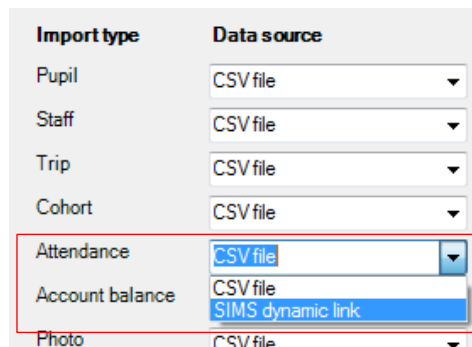
It is necessary to map the absence codes you wish to import via the link from SIMS.net, for example I, N, B, C, etc.

- Select the **Configuration** tab and click **Import from External System**.
- Select **Import Configuration**.
- Click **Change attendance mapping**.
- Select **Dinner Money** from the **Attendance Type** drop down menu.
- Enter a SIMS.net code in **External code**.

- Select the SCO code it is to be mapped to from the drop down list on the right – only relevant codes will be presented.
- Click **Add**.
- Repeat the process for any other codes that you wish to map.
- Click **OK**.



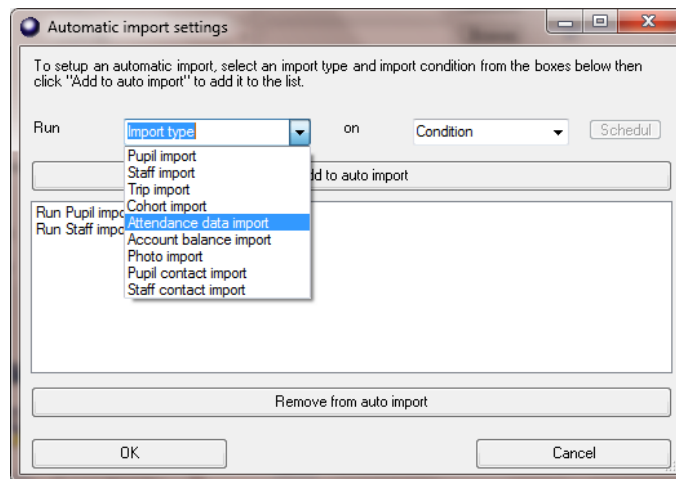
- From the **Data source** drop down next to **Attendance**, select **SIMS dynamic link**.



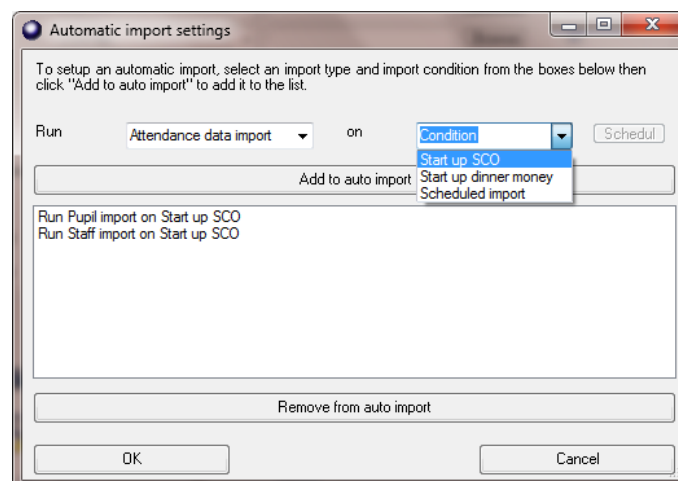
Once you have specified which data to import, you must now tell the system how often to import it.

4.2.2 Set up an automatic absence import on SCO start-up

- In SCO, on the **Configuration** screen, select **Import from external system**.
- Select **Import Configuration**.

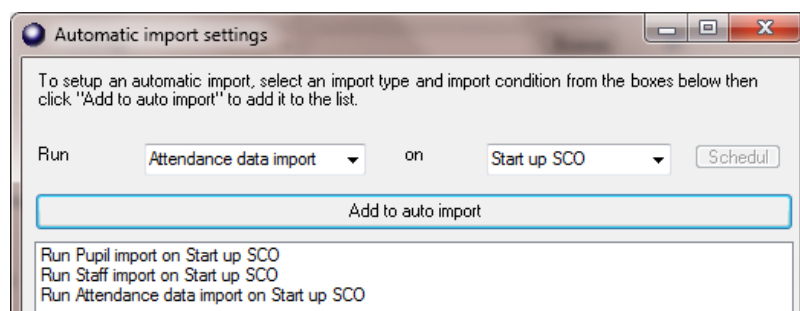


- Click on the **Setup auto import** button.
- Select **Attendance data import** from the drop down list.
- From the **on** drop down list, select **Condition**.
- For SCO to be updated each time you log into it, select **Start up SCO**.



- Once the required **Import type** and **Condition** have been selected, click **Add to auto import**.

The instruction will be added to the panel below.



- Once the required imports have been added, click **OK** to return to the Import configuration screen.
- Click **OK** to exit.

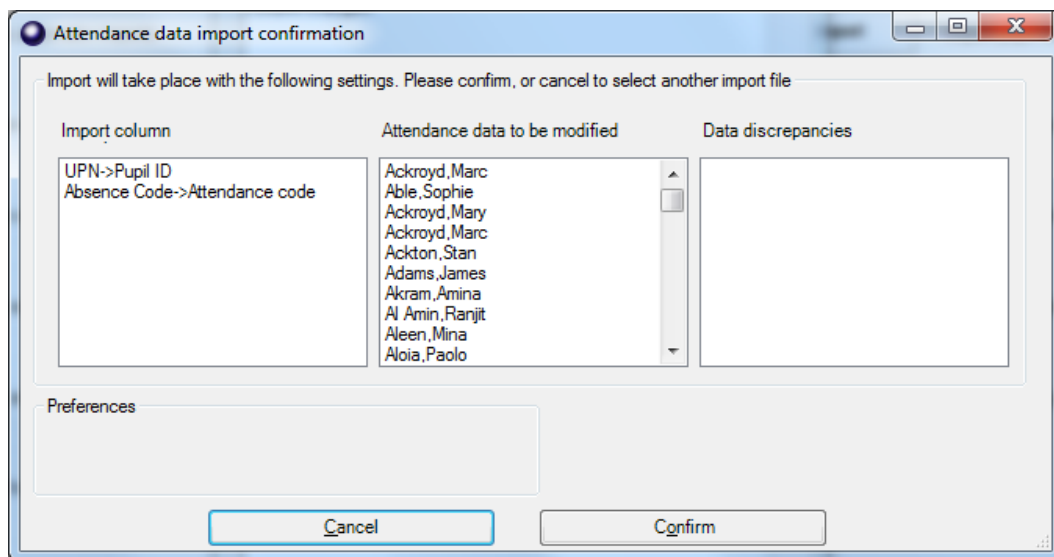
- Click **Close** to exit the **Import from external system** screen.
- Exit SCO.

Note: when SCO is started each day, the pupil data will be updated automatically. The screen may take sometime to show any response – please be patient.

4.2.3 To manually trigger an import (on demand)

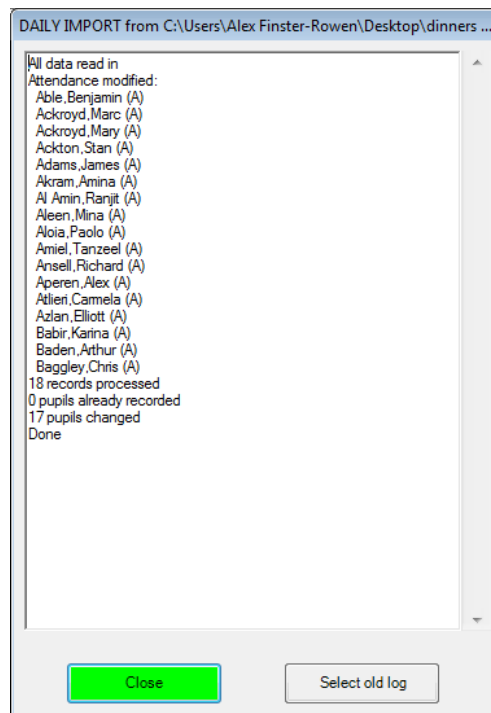
- Start SCO.
- On the **Configuration** screen, select **Import from external system**.
- Select **Attendance Data Import**. The screen may take sometime to show any response – please be patient.
- The import will be carried out and the attendance data will be updated (see further information below).

Whichever way you have chosen to import the data, the following screen will appear showing the attendance data to be modified:



- Click **Confirm**.

- The following screen will then appear:



- Click **Close** to complete the import.

4.3 View attendance data

View the imported data on the **Dinners** screen.

You will see the SCO absence code(s) in the column for today's date.

5. Support

If you have any queries regarding the dynamic link to SIMS.net, please contact:

Tucasi Customer Support

[SCO Help Centre](#)

[Log a Ticket](#)

[Send an Email](#)

Telephone: **02380 016 564**