



# **Schools Cash Office**

## **How to import pre-admission pupils**



**Tucasi Ltd**

Wessex House Upper Market Street Eastleigh Hampshire SO50 9FD  
School Support - 02380 016564 Sales Team - 02380 016563  
[www.tucasi.com](http://www.tucasi.com)

Copyright Tucasi Ltd 2004 - 2022

# Contents

1.	ABOUT THIS GUIDE.....	3
2.	SCHOOLS CASH OFFICE AND GDPR COMPLIANCE .....	3
3.	CHECKS BEFORE IMPORTING PRE-ADMISSION PUPILS (ALL SCHOOLS).....	4
	3.1 <i>Check the Pupil ID used in SCO.....</i>	4
	3.2 <i>Verify the Default year group for imports.....</i>	4
4.	SCHOOLS THAT USE THE ONLINE PAYMENTS CASHLESS CATERING LINK .....	5
5.	DO YOU USE THE SIMS DYNAMIC LINK TO UPDATE PUPIL DATA IN SCO? .....	5
	5.1 <i>Is the SIMS Dynamic link set up on my PC?.....</i>	5
	5.2 <i>Change the SIMS link settings in SCO.....</i>	6
6.	CREATE A PUPIL DATA REPORT FOR PRE-ADMISSIONS IN YOUR MIS SYSTEM.....	7
7.	IMPORT THE PRE-ADMISSION PUPIL DATA INTO SCO.....	8
8.	WHAT HAPPENS IN SEPTEMBER? .....	9
	8.1 <i>Re-configure the SIMS Dynamic Link settings in SCO.....</i>	9
	8.2 <i>Importing pupil data using the SIMS Dynamic Link .....</i>	9
	8.3 <i>Reset the SIMS Dynamic Link to run on start-up of SCO .....</i>	10
9.	IMPORT PUPIL DATA USING A CSV FILE .....	11
10.	IMPORTING PARENT CONTACT INFO FOR PRE-ADMISSION PUPILS .....	12
11.	DOCUMENTATION AND SUPPORT .....	12

## 1. About this guide

This document describes how to import new starters before they have been admitted in your MIS (MIS = **Management Information System** e.g. SIMS, Progresso, Scholarpack, Bromcom, Arbor, PupilAsset, Integris G2) – before the year end roll over.

For example, you may wish to record uniform sales or provide online cashless catering for new starters.

This guide relates to SCO version 2.4.0.96 and later – to check you are on the latest version, in SCO click on the **Income** tab, under the **Help** button the installed version is displayed.

If your version starts with 2.4 but is an earlier version than 2.4.0.96, please refer to <http://www.tucasihelp.com/> for details on the latest upgrade.

If your version starts with 2.3, you cannot use this guide. In SCO at the bottom of the screen click on Guides & Documentation, scroll to the bottom of the screen and follow the SCO How to Import Pre-Admissions Guide.

---

## 2. Schools Cash Office and GDPR Compliance

As you will be aware, new regulations came into place from 25th May 2018 relating to how personal data should be handled under the new GDPR guidelines. At Tucasi we have reviewed our processes and the SCO software to ensure that we are compliant with the new regulations.

We have distributed revised GDPR Contracts to all our customers which will act as an agreement to evidence that Tucasi have stated that they will only process your data in compliance with GDPR. This will also allow Tucasi to evidence that you have given Tucasi authority to process your data within the parameters of the Law.

GDPR requires us to remove data from the database beyond there being no legitimate basis for holding it. Therefore, we ask schools to take responsibility to use correct workflow/processes to keep themselves GDPR compliant.

This would mean, for example, ensuring pupils and staff who are no longer on roll at your school are deleted from the system in a timely manner, ideally during the academic year end process or soon after.

Schools should ensure that completed school Trips are deleted in a timely manner during the academic or financial year end processes, as appropriate.

The Banking screen should be cleared down during the academic or financial year end processes, as appropriate. This would apply even if you don't currently use SCO to reconcile with your bank account.

This document references processes to cover all the above requirements which we hope you find useful.

You may also be interested in the Tucasi news article relating to GDPR which you can find here: [GDPR What This Means](#)

You can view the Tucasi Privacy Policy here: [Tucasi Privacy Policy](#)

If you have any queries regarding GDPR compliance and Tucasi Schools Cash Office, please email [operations@tucasi.com](mailto:operations@tucasi.com).

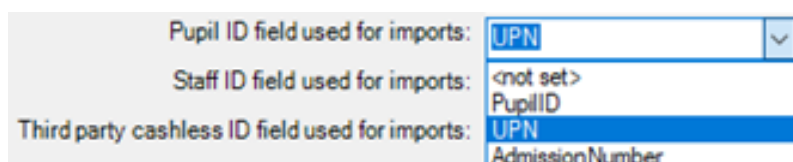
### 3. Checks before importing pre-admission pupils (all schools)

#### 3.1 Check the Pupil ID used in SCO

Check which ID is currently being used as the unique identifier for pupils in SCO. This will be one of UPN, Admission Number or your MIS ID (PupilID).

*Check which Pupil ID you are using in SCO*

- Click on the **Configuration** tab
- Click on **System options**
- Click on the **General** tab
- Note the **Pupil ID field used for imports**  
(usually either Pupil ID, UPN or Admission Number)
- Click on **Done**



*Locate a Sample Pupil ID*

- Click on the **Accounts** tab
- Note the **Last name, First name** and **Pupil ID** for the first pupil
- Cross check this with your MIS to see which ID it matches

For example, these are the general formats:

UPN	X123456789123
Admission No	001234
Admission No	1234 (without leading zeroes)
MIS Pupil or Person ID	6789

Make a note of the Pupil ID type used in SCO: \_\_\_\_\_

#### 3.2 Verify the Default year group for imports

If you are going to import Nursery pupils into SCO and their Year Group in your MIS is marked as N1 or N2, you will need to import these as Year 15s in SCO. To do this, simply change the **Default year group for imports** setting:

- Click on the **Configuration** tab
- Click on **System options**
- Enter the **Default year group for imports:** as **15**
- Click on **Done**

This will ensure that any pupils imported with a Year Group outside of 0-13, or a Year Group with an alphabetical character in the import file, will go into the Year 15 Year Group in SCO.

*Proceed to section 4.*

## 4. Schools that use the online payments cashless catering link

If your school does not use a link to an external cashless catering system for online payments, *proceed to section 5.*

If your school uses Tucasi online payments to top up your cashless catering system you will need to read this section carefully.

If pre-admission pupils are imported into Schools Cash Office without a Pupil ID then parents will **NOT** be able to top up their child's dinner account online. Depending on which Pupil ID you wrote down in section 3.1 please read the relevant section below:

Pupil ID	Action
MIS ID	When a pre-admission pupil is added to your MIS system a MIS ID number is generated. For example, in SIMS.net this is called Person ID. You should be able to generate a report (as described later) for pre-admissions using this ID.
UPN	When pre-admissions are entered into your MIS, the UPN number may also be entered. At this point you should be able to generate a report (as described later) in your MIS containing details of the pre-admission pupils and their UPN.
Admission Number	Admission numbers are not generated until the first day of the new academic year. If you are using Admission Number in SCO and your cashless system and you import your pre-admissions without an Admission Number, parents won't be able to top up the cashless catering account online. The solution is to wait until the pupils are on roll in your MIS and an Admission Number is available.

*Proceed to section 5.*

---

## 5. Do you use the SIMS dynamic link to update pupil data in SCO?

If you don't use SIMS, *proceed to section 6.*

If you do use SIMS, carry out the checks below.

### 5.1 Is the SIMS Dynamic link set up on my PC?

- In SCO, click on the **Configuration** tab
- Select **Import from external system**
- Select **Import configuration**
- Click on **Dynamic link configuration**

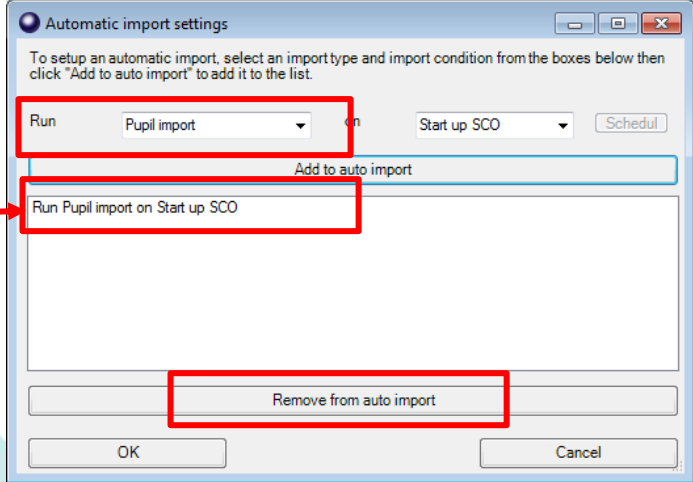
If the **SIMS dynamic link status** indicates **Not installed**, click on **Cancel**, **Cancel** and *proceed to section 6.*

If the **SIMS dynamic link status** indicates **Installed** and there is a username and password in the **SIMS Login** section of this screen, click on **Cancel** and *proceed to section 5.2.*

## 5.2 Change the SIMS link settings in SCO

You will need to temporarily turn off the automatic SIMS import to enable pre-admissions to be imported via a csv file.

### Turn off auto import

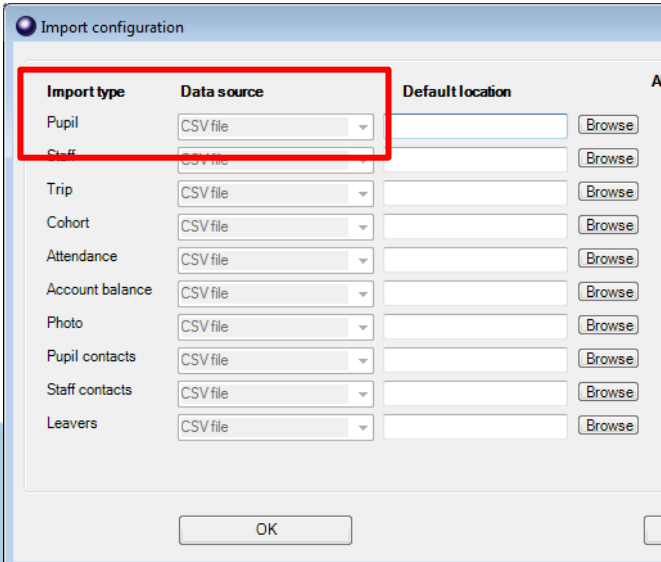
- In SCO, click on the **Configuration** tab
- Select **Import from external system**
- Click on **Import configuration**
- Select **Setup auto import**
- Are there any imports set to run in the large white box?  

- If there are no auto import settings configured in the large white box, click on **Cancel** and proceed to the next step.
- If there are imports set, make a note of these so that you can set them up again later.
- Click on each import e.g. **Run Pupil import on Start up SCO** and click on **Remove from auto import**
- Repeat the above steps and remove any other auto-import tasks such as Pupil contact import
- Click **OK** twice

Check this setting on **all** computers with SCO installed which might be running the Dynamic link to SIMS on start up, then return to the original PC to proceed.

### Change the pupil import to csv

- You are only required to change this setting on the computer you wish to use for the pre-admissions import
- Click on the **Configuration** tab
- Select **Import from external system**
- Click on **Import configuration**
- Select **CSV file** from the **Data source** drop-down next to the **Pupil** import type
- Click on **OK** and then **Close**

Proceed to section 6.



Import type	Data source	Default location
Pupil	CSV file	<input type="text"/> <input type="button" value="Browse"/>
Staff	CSV file	<input type="text"/> <input type="button" value="Browse"/>
Trip	CSV file	<input type="text"/> <input type="button" value="Browse"/>
Cohort	CSV file	<input type="text"/> <input type="button" value="Browse"/>
Attendance	CSV file	<input type="text"/> <input type="button" value="Browse"/>
Account balance	CSV file	<input type="text"/> <input type="button" value="Browse"/>
Photo	CSV file	<input type="text"/> <input type="button" value="Browse"/>
Pupil contacts	CSV file	<input type="text"/> <input type="button" value="Browse"/>
Staff contacts	CSV file	<input type="text"/> <input type="button" value="Browse"/>
Leavers	CSV file	<input type="text"/> <input type="button" value="Browse"/>

## 6. Create a pupil data report for Pre-admissions in your MIS system

A report containing the fields listed below will need to be generated for all Applicants (pre-admissions) and saved (from Excel) as a CSV (comma delimited) file.

Use *either* **UPN**, **Admission Number** or **Person Id** (this should match the Pupil ID you wrote down earlier)

Depending on which Pupil ID you are using will determine how you will complete this process and what actions, if any, you need to take in September. Please refer to the table.

**SCO Communications schools only** - Note that if you import pre-admission pupils **without an ID**, you won't be able to import contact details for these pupils because it is the ID that is used as the identifier to match the pupil with the parent contact.

Existing Pupil IDs in SCO (view on Accounts screen)	Pre-admission IDs to be used in the MIS report	Caption/field header to be used in the csv file	Important notes
UPN e.g. X123456789123	UPN	UPN	The values may not be available in your MIS as yet. You can import blank UPNs at this stage and update them in SCO at the start of the new academic year as described later in this document.
Admission Number e.g. 001234 or 1234 (without leading zeroes)	Admission Number	AdmissionNumber	As the values will not be available in your MIS before the first day of the new academic year, you can import blank Admission Numbers at this stage and update them in SCO at the start of the new academic year as described later in this document.
ID e.g. 6789	Person Id	PupilID	In SIMS.net, Person Id becomes MIS ID when pre-admissions have been admitted.  In SIMS.net, the <b>ID / Person Id</b> fields are only available to users who are part of the <b>Third Party Reporting</b> group. If appropriate, you may wish to ask your IT department or SIMS manager to give you access to this group.

When you create the report in your MIS system you will need to change the caption/heading of each field in the csv as specified below:

Field	Caption/field header
Legal Forename	Forename
Legal Surname	Surname
Date of Birth	Date of Birth
Choose <i>either</i> <b>UPN</b> or <b>Admission Number</b> or <b>person_id</b> (choose this if you are using ID for your existing pupils in SCO)	UPN or AdmissionNumber or PupilID
Year Taught In	Year Taught In
Registration Group	Reg Group
Home Address Line	AddressLine



You should not have all three Pupil ID fields in your report, you should have **one of UPN, AdmissionNumber or PupilID**. Once you have created your csv file it should look similar to this:

Forename	Surname	Date of Birth	UPN <i>or</i> AdmissionNumber <i>or</i> PupilID	Year Taught In	Reg Group	Address Line
John	Smith	01/01/2006	UPN e.g. X123456789123 Admission No e.g. 001234 ID e.g. 6789	15	PreAdmissions	1 High Street, Anytown, AB1 2CD

- Check the csv file carefully to ensure that the data is correct and that the Pupil ID matches that currently used for pupils in SCO, unless blank
- Select **File, Save As**, select a suitable folder location (make a note of the location) and enter a filename, for example **SCO PreAdmissions 2019**
- In the **Save as type** field, select **CSV (Comma delimited)**
- Click on **Save**
- Click **Yes** when prompted
- Close the file and exit Excel
- Click **No** when prompted

**Note** that subsequently opening the csv file to view or change information may cause corruption of data. If amendments are required, **do not open and amend this file** – run the report again in SIMS, make the required changes and re-save the file in csv format.

*Proceed to section 7.*

## 7. Import the Pre-admission pupil data into SCO

- In SCO, click on the **Configuration** tab
- Click on **Import from external system**, select **Pupil import**
- Browse and select the SCO PreAdmissions 2019 CSV file you saved in section 6
- A window will be displayed summarising the actions taken
- Carefully review the **Data discrepancies** section to ensure no duplicates are imported
- Carefully review the **Pupil accounts to be modified** section to ensure any pupils marked as **[New]** are the required pre-admission pupils
- For any pre-admissions without Pupil ID, tick **Allow blank pupil ID**, then click **Re-scan data**
- Click **Confirm**
- Click **Close**
- Click on the **Accounts** tab and review the data

The screenshot shows a 'Pupil account import confirmation' dialog box. It contains the following sections:

- Import column:** A list of columns to be imported: Forename->First name, Surname->Last name, Address Line->Address, Date of Birth->Birthday, Year Group->Year, Reg Group->Class name, PupilID->Pupil ID.
- Pupil accounts to be modified:** A list of accounts: Alderson, Alex (New), Ackroyd, Ben (New).
- Data discrepancies:** A list of discrepancies: Alderson, Alex duplicated.
- Preferences:** A section with several checkboxes:
  - Allow blank pupil ID** (highlighted with a red box)
  - Merge with existing pupil without ID
  - Merge accounts with different ID
  - Restore pupil if deleted
- New account configuration:** A section with a checkbox: Available online (checked).

Buttons at the bottom include 'Re-scan data', 'Cancel', and 'Confirm'.

For schools that use the SIMS Dynamic Link *proceed to section 8.*

For schools that don't use the SIMS Dynamic Link *proceed to section 9.*

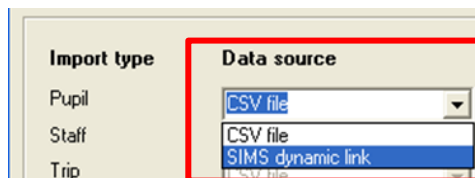


## 8. What happens in September?

### 8.1 Re-configure the SIMS Dynamic Link settings in SCO

Follow this step once your pre-admission pupils are marked as On roll in SIMS.

- In SCO, click on the **Configuration** tab
- Select **Import from external system**
- Click on **Import configuration**
- Select **SIMS dynamic link** from the **Data source** drop-down next to the **Pupil** import type
- Click **OK**
- Click on **Close**

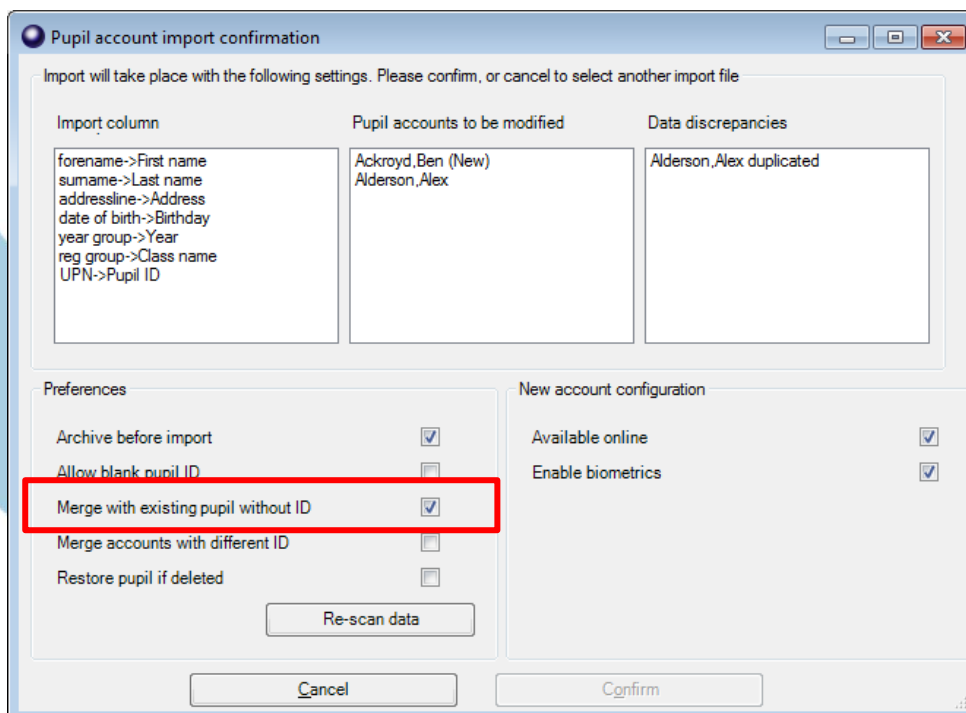


Proceed to next section.

### 8.2 Importing pupil data using the SIMS Dynamic Link

On or after the first day of the new academic year, import from your MIS all your pupils on roll. This will change the class and year of any existing pupils and will assign the correct class to the pre-admissions you imported earlier on in the year.

- In SCO, click on the **Configuration** tab
- Select **Pupil import**
- In case of discrepancies, a **Data discrepancies** screen will appear to ensure no duplicates are imported
- If you previously imported pre-admissions with blank Pupil IDs, tick **Merge with existing pupil without ID** and click on **Re-scan data**



- Check the **Pupil accounts to be modified column** to ensure that any pupils marked as **[New]** are new to the school since the pre-admission import
- Click **Confirm**
- Repeat for any other imports you would normally do e.g. Pupil contact import
- Click **Close**
- Click on the **Accounts** tab and review the data

Proceed to next section.

### 8.3 Reset the SIMS Dynamic Link to run on start-up of SCO

If the SIMS Dynamic Link was previously set to auto-import pupil data on start-up of SCO as removed in section 5.2, you will need to reset this option.

Otherwise, proceed to section 10.

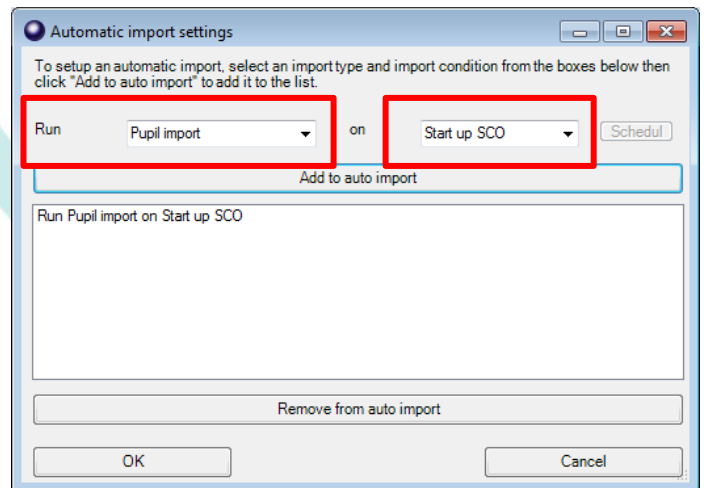
- In SCO, click on the **Configuration** tab
- Select **Import from external system**
- Click on **Import configuration**
- Select **Setup auto import**
- Next to **Run** select **Pupil import**
- Then select **Start up of SCO**
- Click on **Add to auto import**

Repeat these steps if you wish to add any other tasks to auto-import, e.g. Pupil contact import.

**Note:** ensure that Pupil Contact import is set up **after** the Pupil import.

- Click **OK** twice.

Proceed to section 10.



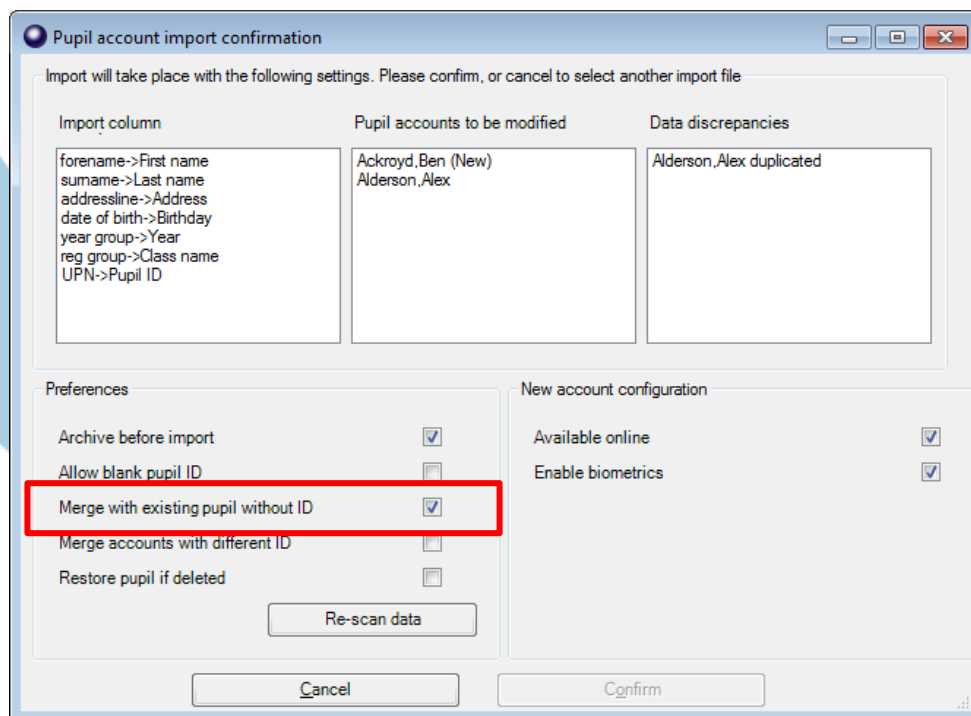
## 9. Import pupil data using a csv file

You may already have a Pupil data import report in your MIS which you can generate to give the following information. If not you will need to create one, as follows:

The generated report **must** contain **all** the mandatory fields listed below with exact field names as indicated. You may need to manually rename or merge fields in Excel if your MIS system does not automatically generate the required fields. **The column label for the pupil ID MUST match Pupil ID field set for imports in SCO**

Mandatory fields:	Optional fields:
Forename	Notes
Surname	Gender
Date of Birth	Salutation
Either <b>UPN</b> or <b>PupilID</b> or <b>AdmissionNumber</b> (this needs to match the Pupil ID field used for imports, as you wrote down in section 2.1)	PupilPremiumIndicator
Year Taught In	
Reg Group	
Address Line	
Eligible for Free Meals	

- In SCO, click on the **Configuration** tab
- Select **Pupil import**
- Browse and select the SCO Pupil Data CSV file you saved above
- A window will be displayed summarising the actions taken
- Review the **Data discrepancies** screen to ensure no duplicates are imported
- If you previously imported pre-admissions with blank Pupil IDs, tick **Merge with existing pupil without ID** and click on **Re-scan data**. This is important as it will ensure no duplicate pupil records are created



- Check the **Pupil accounts to be modified column** to ensure that any pupils marked as **[New]** are new to the school since the pre-admission import
- Click **Confirm**
- Click **Close**
- Click on the **Accounts** tab and review the data

Proceed to section 10.

---

## 10. Importing parent contact info for Pre-admission Pupils

**SCO Communications schools only** - If the pre-admission pupils have been imported **with an ID**, you can continue to import the parent contact details if these are already updated in your MIS. Refer to the document **SCO Communications Configuration Guide step 16. Appendix A – Pupil contact details** for the required fields. Access this from SCO by clicking Guides & Documentation.

If you have imported pre-admission pupils **without an ID**, you won't be able to import contact details for these pupils because it is the ID that is used as the identifier to match the pupil with the parent contact.

---

## 11. Documentation and Support

Congratulations! You have now completed the Pre-admissions import.

If you have any queries, please contact:

 **02380 016564**

 **support@tucasi.com**

In **SCO** click on [Guides & Documentation](#)

*To carry out the academic year end process including removing leavers,  
Importing new starters and moving pupils into their new classes/year groups*  
Refer to this guide **Academic Year End Guide**

*To carry out the Financial Year End Process,  
including archiving trips and reconciling the Banking:*  
Refer to the guide **Financial Year End Guide**

*To change which items are available online and  
generate Online access letters for new starters:*  
Refer to the guide **Quick Reference Guide Online Payments**