**TUCASI**

**Schools Cash Office**
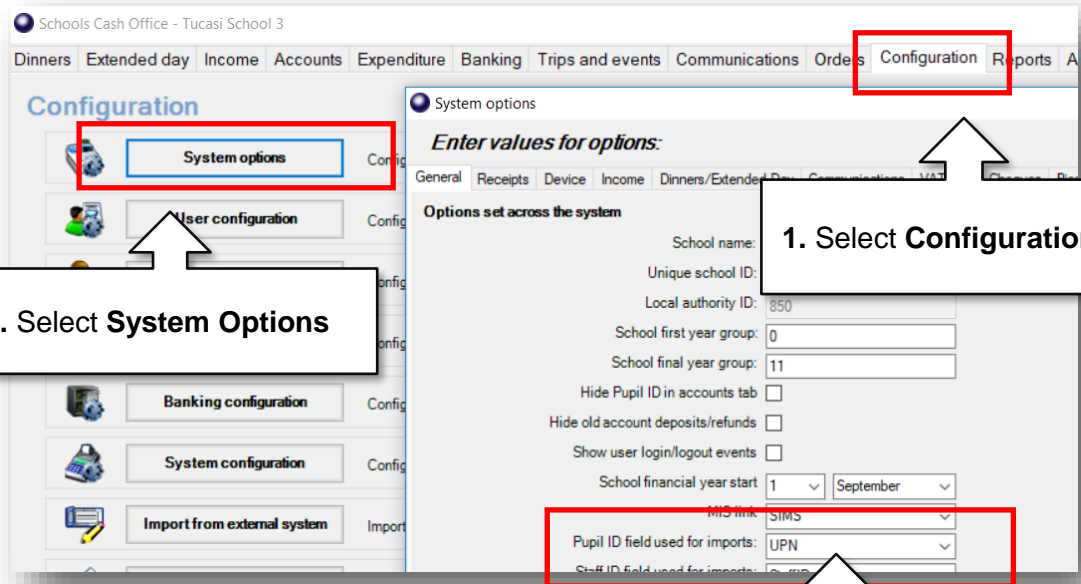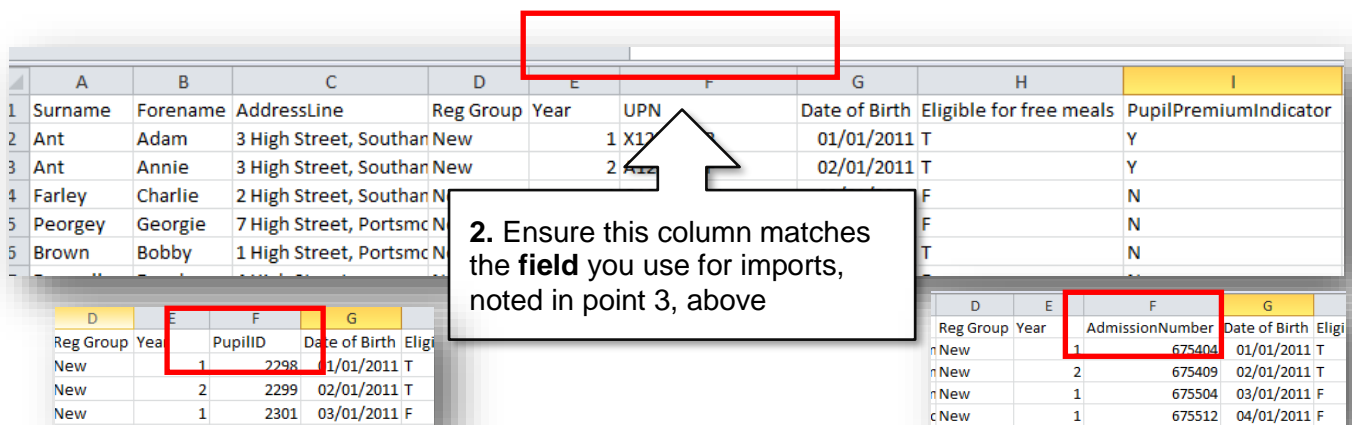Income Administration Software

## How do I check which Pupil ID I need to use?



**1.** Select **Configuration**

**2.** Select **System Options**

**3.** Note down the **field** name used for pupil imports - you will need to include this in your import report, below

## What does my import file need to look like?

**1.** Use your MIS to create a report output containing the appropriate field headings. If necessary refer to your Data Manager or MIS Support Team for advice.

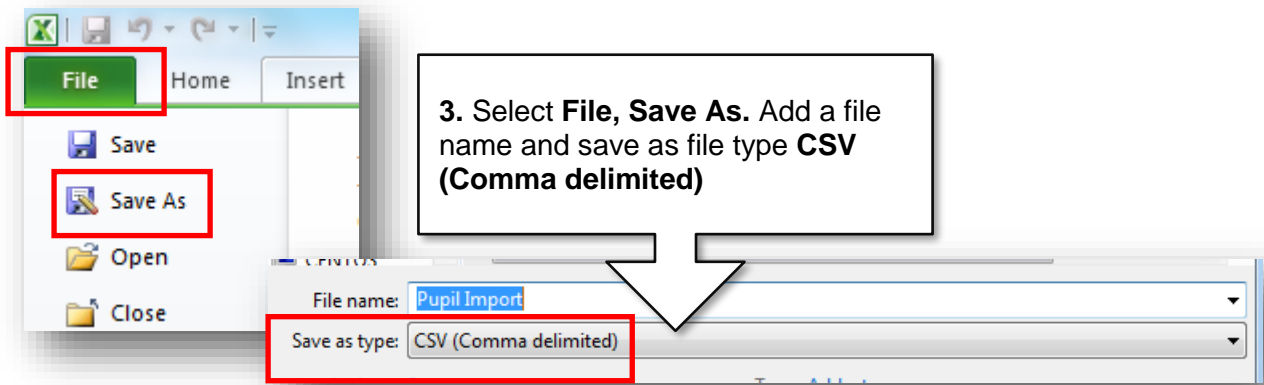NB. The field headings must be EXACTLY as typed in the examples below – including spaces and capitals



**2.** Ensure this column matches the **field** you use for imports, noted in point 3, above
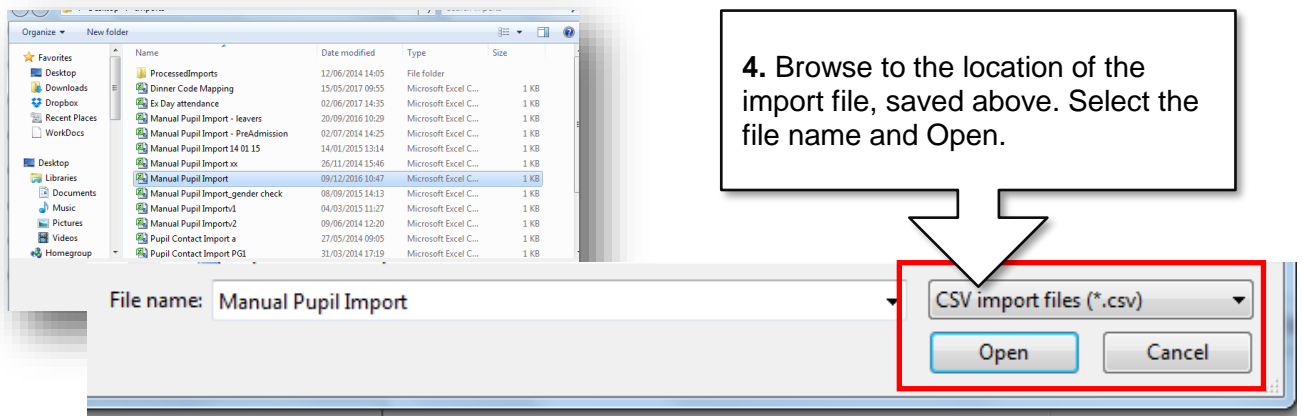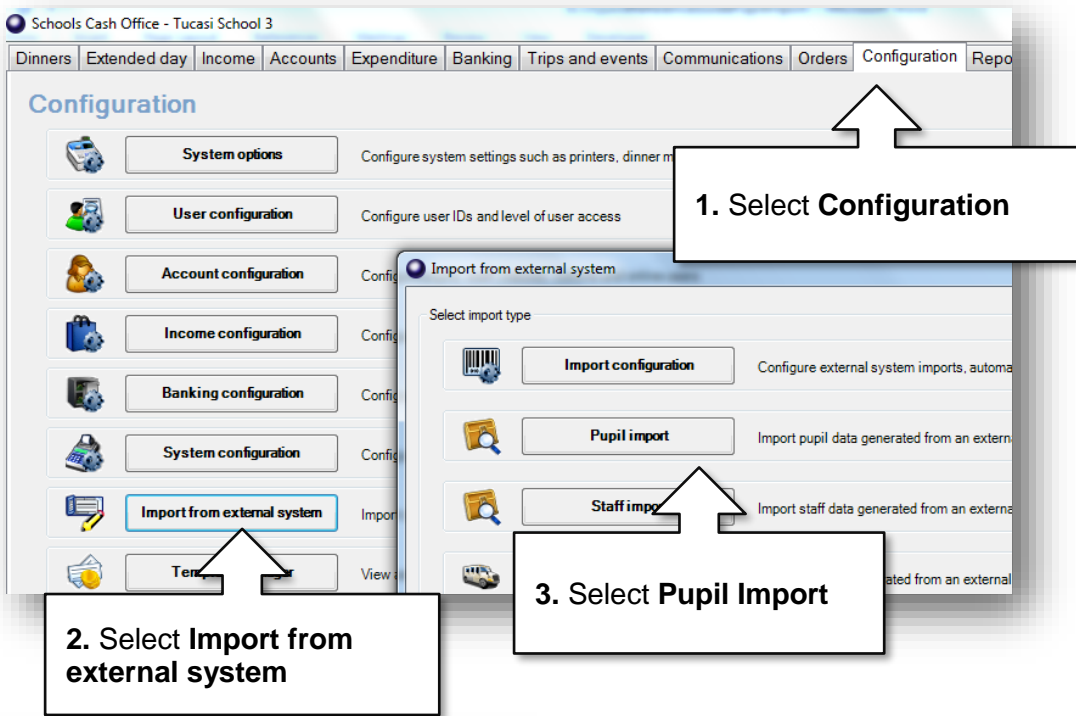
**3.** Select **File, Save As.** Add a file name and save as file type **CSV (Comma delimited)**

File name: Pupil Import

Save as type: CSV (Comma delimited)

**4. Close** the file

# How do I import my file to SCO?

Schools Cash Office - Tucasi School 3

Dinners | Extended day | Income | Accounts | Expenditure | Banking | Trips and events | Communications | Orders | Configuration | Repo

## Configuration

System options — Configure system settings such as printers, dinner m

User configuration — Configure user IDs and level of user access

Account configuration — Conf

Income configuration — Conf

Banking configuration — Conf

System configuration — Conf

Import from external system — Impor

Tem... — View

**1.** Select **Configuration**

### Import from external system

Select import type

Import configuration — Configure external system imports, automa

Pupil import — Import pupil data generated from an extern

Staff impo... — Import staff data generated from an externa

...ated from an external

**3.** Select **Pupil Import**

**2.** Select **Import from external system**

Organize ▾  New folder

★ Favorites
  📁 Desktop
  📁 Downloads
  📁 Dropbox
  📁 Recent Places
  📁 WorkDocs

📁 Desktop
📁 Libraries
  📄 Documents
  🎵 Music
  🖼 Pictures
  📹 Videos
👥 Homegroup

| Name | Date modified | Type | Size |
|---|---|---|---|
| ProcessedImports | 12/06/2014 14:05 | File folder | |
| Dinner Code Mapping | 15/05/2017 09:55 | Microsoft Excel C... | 1 KB |
| Ex Day attendance | 02/06/2017 14:35 | Microsoft Excel C... | 1 KB |
| Manual Pupil Import - leavers | 20/09/2016 10:29 | Microsoft Excel C... | 1 KB |
| Manual Pupil Import - PreAdmission | 02/07/2014 14:25 | Microsoft Excel C... | 1 KB |
| Manual Pupil Import 14 01 15 | 14/01/2015 13:14 | Microsoft Excel C... | 1 KB |
| Manual Pupil Import xx | 26/11/2014 15:46 | Microsoft Excel C... | 1 KB |
| Manual Pupil Import | 09/12/2016 10:47 | Microsoft Excel C... | 1 KB |
| Manual Pupil Import_gender check | 08/09/2015 14:13 | Microsoft Excel C... | 1 KB |
| Manual Pupil Importv1 | 04/03/2015 11:27 | Microsoft Excel C... | 1 KB |
| Manual Pupil Importv2 | 09/06/2014 12:20 | Microsoft Excel C... | 1 KB |
| Pupil Contact Import a | 27/05/2014 09:05 | Microsoft Excel C... | 1 KB |
| Pupil Contact Import PG1 | 31/03/2014 17:19 | Microsoft Excel C... | 1 KB |

File name: Manual Pupil Import

CSV import files (*.csv)

Open | Cancel

**4.** Browse to the location of the import file, saved above. Select the file name and Open.

**5.** Review the import summary window – check that expected pupils are marked as **(New)** – existing pupils should be listed but not marked as (New).

NB Pupils who have previously been deleted or have a blank ID field will be marked as a discrepancy.

Pupil account import confirmation

Import will take place with the following settings. Please confirm, or cancel to select another import file

| Import column mapping | Pupil accounts to be modified | Data discrepancies |
|---|---|---|
| Sumame->Last name | Ant,Adam (New) | |
| Forename->First name | Craddock,Fanny (New) | |
| Address line->Address | Farley,Charlie (New) | |
| Reg Group->Class name | Peorgey,Georgie (New) | |
| Eligible for free meals->Free meals | Brown,Bobby (New) | |
| PupilID->Pupil ID | Donnolly,Derek (New) | |
| Year->Year | Evans,Ernest (New) | |
| Date of Birth->Birthday | Houseman,Hector (New) | |

Preferences

Allow blank pupil ID ☐

Merge with existing pupil without ID ☐

Merge accounts with different ID ☐

Restore pupil if deleted ☐

Re-scan data

New account configuration

Available online ☑

Cancel    Confirm

**6.** Select **Confirm** to run the import

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## Support

If you have any queries please click the **help** button within SCO to access the online Help Centre or contact our Customer Support team.

Email: support@tucasi.com
Telephone: 02380 016 564

Help