

Schools Cash Office

Income Administration Software

How do I check if I am licensed for the SIMS Link?

Dinners Income Accounts Expendit	re Ba	3anking │ Trips and events │ Comr	1. Select Admin an System status repo	d ort	Admin Mair
Check for software update	с	Ch System status	Res .		×
End of financial year	F	Fu Installation Upgrades Terminals Schools Cash Office vers To change your licensed	ion: 2.4.0.5 components, please contact Tucasi Sales.		
End of academic year	F	Fu Licensed components:			
Database management	D	Da Tucasi cashless catering Lettings management	Status Licensed Licensed		
Terminology	s	Se Primary classroom edition	Licensed		2. On the System
Send diagnostic data to Tuc	si G	Ge Dynamic link to MIS syste	m Licensed		status window, check the screen displays
Today's information alerts	v	Vie	Close	\neg	system is licensed
System status report	D	Display the current SCO version number an	nd the licence information		

If **Dynamic Link to MIS system is not licensed** please contact our Sales team on 0844 800 4017 who will be happy to discuss it further.

How do I check what we are using as the Pupil ID?

Dinners	Extende	ed day Inco	ome Accounts	and c Pupi	check t I ID co	he details in t lumn	he
Account No	Last name	First name	Address	Class	Status	Pupil ID	-
Account No 1002	Last name Able	First name Benjamin	Address 45 Willow Way, Port Talbot, SA12 8TP	Class 10B	Status Gift aid	Pupil ID V820444405031	
Account No 1002 1004	Last name Able Ackroyd	First name Benjamin Marc	Address 45 Willow Way. Port Talbot, SA12 8TP 27 Springfield Avenue, Kempston, Bedford, Bedfo	Class 10B 8B	Status Gift aid Gift aid	Pupil ID V820444405031 T820200100036	

Please note the pupil ID can be one of three options, cross check in SIMS if unsure.

- UPN e.g. X123456789123
- Admission Number e.g. 001234
- SIMS ID e.g. 6789

NB: The SIMS ID field is not visible on the pupil's record in SIMS.

The field used is also set in the configuration in SCO and can be checked as follows:

Schools	s Cash Offi	ice						42				
Dinners	Income	Accounts	Expenditure	Banking	Trips and events	Communications	Lettings	Orders Cont	figuration	Reports	Audit	Adm
Con	figura	ition				1	1. C	lick on th	he			
	6	Systemo	options	Configure	e system settings such	as printers, d	Cor ther	n figurati n click or	on tab 1 Syst	o and em		
		User confi	iguration	Configure	e user IDs and level of	user access	opti	ions				
8		Account cor	nfiguration	Configure	e pupils, staff, classes	, cohorts <mark>and</mark> online user	rs					
Ľ		Income con	figuration	Configure	e products, VAT codes	and trip tick boxes						
	8	Banking cor	nfiguration	Configur	e bank accounts, cost	centres, account codes a	an <mark>d</mark> pre-payr	ment accounts				
		Lettings co	nfiguration	Manage	configuration related to	lettings						
4		System con	figuration	Configure	e system colours							
Ę	/	port from ext	ternal system	Import da	ata generated from an	external system						
K		Template	manager	View and	l edit mail merge temp	lates						
0		Update on	line logo	Upload a	new online school log	10						

General	Receipts	Device	Income	Dinners/Extended	Day	Communications	VAT/Tax	Cheques	Biometrics	s Online		
Ontio	ns set acro	ss the sv	stem								*	
- prior				School name:	UAT	School 4						
				Unique school ID:	1004		_					
			Cabaa	Ocal authority ID:	999							
			Schoo	o first year group:	0							
			School	I final year group:	15							
			De	fault daily spend:	0							
		Hi	de Pupil I	D in accounts tab							E	
		Hide of	d account	deposits/refunds					1 -			
		Sho	ow user lo	gin/logout events				/	<u> </u>	2. IVIAKE S	sure tr	hat the
		_	School fi	nancial year start	6	✓ April	•			options fo	or Pup	oil and
		Pup	oil ID field	used for imports:	UPN				9	Staff imp	orts a	re set to
		Sta	aff ID field	used for imports:	Staff	D	•		t	he corre	ct ID f	ield being
			:	Set up term dates	Se	tup			Πı	used in v	our sv	stem.
		Def	ault year (group for imports:	15		1			lood III y	our oy	otonn
Option	ns set on ti	nis comp	uter only									
				Logo file:	tucasi	.bmp						
				Photo path								
		Show bir	thday mea	ssages at start up								
	D-6-11			f	-						π.	

How do I configure the SIMS Link to import pupils?

Schools Cash Dinners Inco Configu	Office me Accounts Expenditure Iration	Banking Trips	and events Communicat	ions Lettings Orders	Configuration	1. Click on the Configuration tab and then Import from external system
\$	System options	Configure system	n settings such as printers, dinn	er money, and communication	s	
S	User configuration	Config O Imp	ort from external system		_	
&	Account configuration	Config Se	lect import type		1 2 0	lick on Import
	Income configuration	Config	Import co	nfiguration		figuration
	Banking configuration	Config	Rupili	import Import p	upil data generated from a	
	Lettings configuration	Manag	👩 Staffi	mport Import s	taff data generated from a	
	System configuration	Config				
9	Import from external system	mport		Import tr	ip data generated from an	
	Template manager	View a	Cohort	import Import c	ohort data generated from	
	Run setup wizard	Set yea	Attendance	data import Import a	ttendance data generated	
	Update online logo	Unload				
Import configur	ation					
Import type	Data source		Default location		Allow location override?	Dynamic link configuration
Pupil	SIMS dynamic link	•		Browse		Edit pupil
Staff	CSV file	-		Browse		
	SIMS Login Username Password	examp	leuser		3	configuration
	Update	$\langle \rangle$	4. Add a s Password Party Rep Click Upd	SIMS Userr d for a SIMS porting privil late	hame and S user with ⁻ eges.	Third
Import co	nfiguration					
Import ty Pupil Staff	pe Data source SIMS dynam CSV file	e ic link	Default loc	ation Bro	Allow location override? wse wse	Dynamic link configuration Edit pupil import csv mapping
Select import typ	pe Import configuratio Pupil import	n		6. Click of wheneve	on Pupil im er it is requii	port to trigger the import red

Pupil account import confirmation					
Import will take place with the following settings. Please confirm, or car	cel to select another import file				
Import column P	upil accounts to be modified	Data discrepano	cies		
Sumame->Last name Forename ->First name Addressine ->Address DOB->Birthday Gender->Gender Reg Group->Class name C Year Group->Year UPN->Pupi ID Eligible for Free Meals->Free meals F	ble, Benjamin leen, Mina asyr, Rani lundell, Justine allar, Morven orfeone, Vito raddock, Penelope avies, Olivia oone, Felicity auzi, Ahmad Farid uthrie, Jessica	•		7. Review th check there obvious disc Click Confir the import	ne data to are no crepancies. c m to start
Preferences	New account	configuration			
Allow blank pupil ID	Available o	nline			
Merge with existing pupil without ID	Enable bio	netrics			
Merge accounts with different ID					
Restore pupil if deleted					
Re-scan data					
Cancel		Confirm			



You are also able to set up the following imports from SIMS:

Staff - to import current staff

Cohort – to import tutor groups from your MIS for using with the Parents' Evening module in secondary school

Attendance - to import absences into Dinners and Extended Day modules

Pupil contact – to import pupil contact data for the Communications module

Staff contact - to import staff contact data for the Communications module

Leavers - to import pupil leaving dates into SCO

How do I set the SIMS Dynamic Link to import automatically when I log in to SCO?



Support

If you have any queries please click the



button to access the online Help Centre or contact our Customer Support team.

Email: support@tucasi.com Telephone: 0844 800 4017