



Saving Time and Money with @Schools (www.schools.plc.uk)

A Bursar/Administrator Guide

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(With Changes by A Marshall Devon ScoMIS Unit)

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For help, and to give comments /suggestions on @Schools please e-mail info@ukplc.net

(For any comments on the SIMS FMS system please contact Capita Educational Services)

Technical note:

As @Schools is provided as an online service it makes no demands upon your PC/network. Any form of web access (including a dial-up modem) will suffice, although Broadband offers quickest response.

Using @Schools to save Time and Money for your school

1.0 Introduction

1.1 **@Schools is a system which links your schools and its suppliers online.** It will help you:

- 1.1.1 **Significantly cut the paperwork** associated with ordering.
- 1.1.2 **Minimise “Returns”** No need to re-key scribbled orders means a major reduction in wrong goods arriving, and the resultant problems.
- 1.1.3 **Faster processing of orders.** Orders can be approved and sent straight way to suppliers via a secure online message. Because suppliers usually receive these orders straight into their processing systems, there are time savings here too.
- 1.1.4 **Compliance to Govt standards.** All confirmed orders will be sent in the new standard format called UK-GOV XML
- 1.1.5 **More Auditability.** All stages involve personal sign-ins, so provide a full Audit Trail.
- 1.1.6 **Potentially lower prices.** This approach offers many cost savings for suppliers. It will also be easier for schools-and Education Authorities- to focus on suppliers offering Best Value.

*@Schools is talking with providers of other financial systems for schools. Please e-mail info@ukplc.net if you use another financial system for your school purchasing, tell us the system/release involved and we can keep you updated.

1.2 There are benefits to registering now for @Schools whatever release of SIMS-FMS you currently have installed. It is free. At time of writing there are also over £100 of free items available from @Schools registered suppliers once you download their SIMS item catalogues.

-Version 6.75 of SIMS FMS allows you to send all your orders to @Schools registered suppliers online saving time and postage/fax costs and reducing possible errors at the supplier.

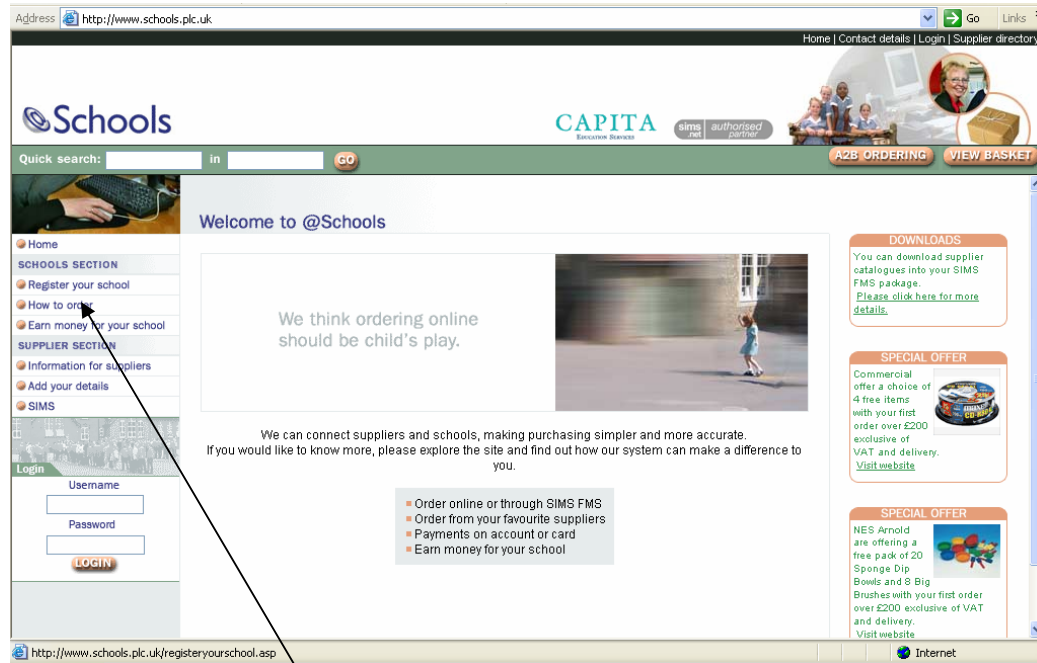
-Version 6.76 allows the new process termed “Content Ordering”. Here any authorised teacher or bursar can create a list of requested items on @Schools –termed a **Content Order** and **their Content Order passes automatically and without re-keying** straight into your school SIMS-FMS system. Once approved the order then passes online to the supplier(s) concerned.

1.3 Before you register, however, please check with your authority, as they may already have put in place a system to register all schools in the authority

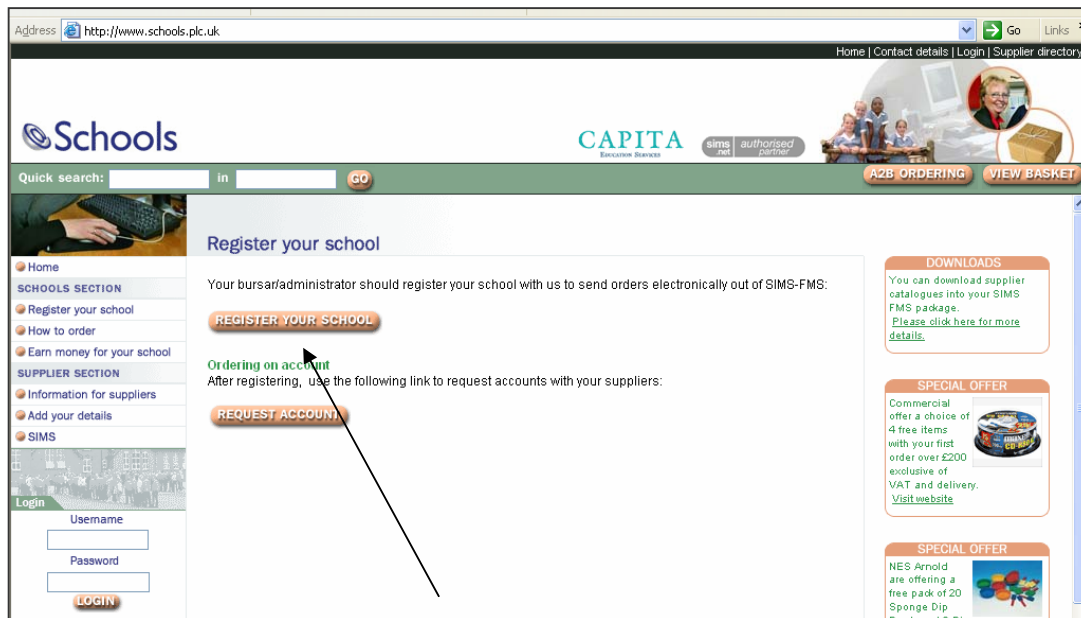
For help, and to give comments /suggestions, please e-mail info@ukplc.net

2.0 Registering your School

- 2.1 If you are the school administrator/bursar, please go to the @Schools portal www.schools.plc.uk. (NB Correct e-mail and telephone details are essential as we use these to validate applications)



Click on “Register your school”



and then click on the “Register your School” orange button .

Enter your schools details

Address: <http://www.schools.plc.uk> Home | Contact details | Login | Supplier directory

Schools CAPITA simms authorised partner **A2B ORDERING** **VIEW BASKET**

Quick search: _____ in _____ **GO**

Register your school

Please enter your school details below.
When the registration process is complete, you will then be able to request supplier accounts with every participating supplier registered with us.
Please note: The suppliers concerned will be responsible for the authorisation of your account. We cannot authorise supplier accounts on your behalf and the supplier(s) decision is final)

Your school details

School name*	<input type="text"/>
Address line 1*	<input type="text"/>
Address line 2	<input type="text"/>
Address line 3	<input type="text"/>
Address line 4	<input type="text"/>
Village/District	<input type="text"/>
Town*	<input type="text"/>
County	Not applicable <input type="button" value="v"/>

Downloads
You can download supplier catalogues into your SIMS FMS package. [Please click here for more details.](#)

SPECIAL OFFER
Combined Office Interiors are offering one free teacher's chair with every order of 35 or more children's multi-tasking chairs. [View more info](#)

SPECIAL OFFER
Galt Educational are offering a free pack of Fluorescent Octonors with your first order

Navigation: Home, **SCHOOLS SECTION** (Register your school, How to order, Earn money for your school), **SUPPLIER SECTION** (Information for suppliers, Add your details, SIMS), Login (Username, Password, **LOGIN**)

Click on Next and on the next screen enter your personal contact details

Quick search: _____ in _____ **GO** **A2B ORDERING** **VIEW BASKET**

Register your school

Please enter your personal details below.

Your details

Title	None <input type="button" value="v"/>
First name*	<input type="text"/>
Surname*	<input type="text"/>
Job title	<input type="text"/>
Department	<input type="text"/>
E-mail address*	<input type="text"/>
Phone number	<input type="text"/>
Mobile Phone	<input type="text"/>

Downloads
You can download supplier catalogues into your SIMS FMS package. [Please click here for more details.](#)

SPECIAL OFFER
Inkjet Cartridges Plus offer massive savings on branded inkjet cartridges. [Visit website](#)

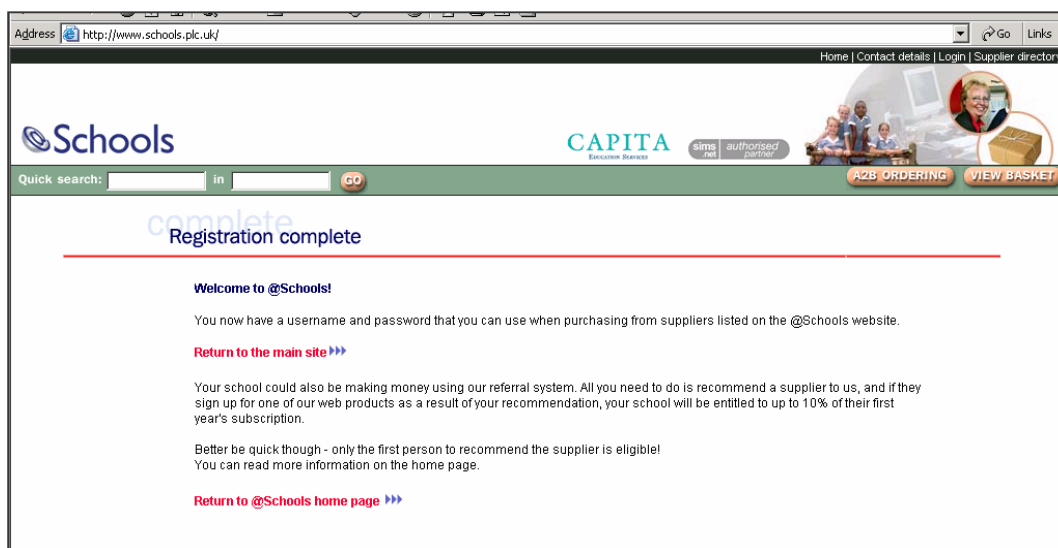
SPECIAL OFFER
Davies Sports are offering a free Superbat set with your first order over £200 exclusive of VAT and delivery. [Visit website](#)

Navigation: Home, **SCHOOLS SECTION** (Register your school, How to order, Earn money for your school), **SUPPLIER SECTION** (Information for suppliers, Add your details, SIMS), Login (Username, Password, **LOGIN**)

Buttons: **SUBMIT**, **MORE OFFERS...**

This will be your login as **Bursar/Senior Administrator**. This login will be allowed to make setup changes including add new users. This login will **not** be able to create Content Orders –see later.

2.4 Your school is now registered.



You will be asked to change your password at first log in to one only you will know. Keep that safe and never share it . You are asked to agree the terms and conditions/user policy of @UK PLC*

* NB These are general conditions for all the many @UK “portals” serving the public and private sectors. Of necessity these contain aspects not relevant to schools, but we will be pleased to discuss any aspect with you, or your LEA if required.

3.0 Setting up your Suppliers

3.1 The objective of @UK PLC is to make it as easy as possible for public sector customers such as schools, police stations and hospitals to deal with their suppliers. The supplier connects once electronically to the @UK PLC hub. All their orders are then routed to them in whatever format is most appropriate for their computer system from all their customers, from any @UK site.

3.2.1 We recommended that as the bursar/administrator, you ensure that all your school suppliers are set up as soon as possible after you register. This saves time when a sudden need arises. (NB Your Local Authority may be setting up all your suppliers on your own Authority portal, so we recommend that you check with them first)

3.2.2 If you are setting up your suppliers yourself, all you need to do is to send a supplier request (see below). This only takes 1-2 minutes per supplier, as many fields are pre-filled. You should do this if you have v 6.75 or v 6.76 of SIMS.

3.4 Setting up your accounts with suppliers

3.4.1 Login to @schools as the bursar/senior administrator and you will see the Administration area of the site as below

Click on the tab marked “Request Supplier Account”

Schools ADMINISTRATION CAPITA Education Services sims net authorised partner

HOME SUPPLIER CODES VIEW/EDIT USERS SIMS EMAIL ADDRESSES DOWNLOAD CATALOGUE TO SIMS **REQUEST SUPPLIER ACCOUNT**

request account

Although you will probably already have a credit account with all the suppliers you want to have set up on @Schools, this needs to be registered with @Schools.

*@UK PLC will approach any company not yet registered with @Schools and explain how they can join. There is a reward for the first school to suggest any new supplier. Please see the main @Schools website for more details of this offer.

You need to use the account request form to request an account via @Schools. Many of the fields are pre-filled, so this need not take long.

The supplier will then need to approve your account before you can order through SIMS FMS and @Schools.

[Search for your supplier](#)
Please enter the name of the supplier you wish to set up an account with:

acme

3.4.2 You will then see a screen that allows you to search the @UK database for the companies you want to open an online account with:

Enter a the first few characters for the supplier’s name and click on **Search**

*E.g. Searching on “Capi” will offer all suppliers that **begin** with Capi, such as Capita.*

You may need to try different searches if the supplier is not registered in the exact name that you think it should be.

3.3.4 You may be presented with more than one supplier as a result of your search

HOME SUPPLIER CODES VIEW/EDIT USERS SIMS EMAIL ADDRESSES DOWNLOAD CATALOGUE TO SIMS REQUEST SUPPLIER ACCOUNT

request account

Your search results are listed below.

Supplier info	Current status	
acme decking Limited 35 millmark grove (london)	Supplier does not currently take online orders.	<input type="button" value="REQUEST ACCOUNT"/>
acme motorcycles Limited 38 wyatt close (feltham)	Supplier does not currently take online orders.	<input type="button" value="REQUEST ACCOUNT"/>

Having chosen the right supplier then confirm the right company by clicking on “Request Account”

- 3.3.5 Once a company application for an account appears, you will find that many of your details have been pre-filled. Just complete the e-form (including your existing account number with that supplier, if you already have an account). The supplier will then approve your application*.

*Approval of your credit account is, of course, at the discretion of the supplier

- 3.3.6 If your school/authority prefers to pay your suppliers by credit or purchase card, the @Schools system can accommodate this. Just click “Other” in the payment section of your Request for Account and put “By card” in the text field below.
- 3.3.7 Having requested an Account with a supplier you will be notified by e-mail when the supplier is ready to deal with you via @Schools

You will be sent in that same e-mail the unique e-mail address that you should copy and paste into the “Email Address Destination” box of your Supplier Reference (v 6.75 and v 6.76). This email address informs the @Schools system of where your e-mailed confirmed orders for that supplier are coming from, and going to.


Also in that e-mail will be the special reference to be used in the “XML supplier reference” box within your SIMS FMS supplier set-up to identify Content Orders for that supplier (v. 6.76 only)




If you currently do not have an account with that supplier they will also supply you with an account number

For operation of the relevant portions of SIMS FMS please contact your relevant coordinator or Capita ES direct.

4.0 Setting up Users

- 4.1 To set up staff as authorised users, you as the bursar/administrator should login and go to Administration page.
- 4.2 Choose View/Edit users.
- 4.3 Choose Add user




User details:	
First name	<input type="text"/>
Surname	<input type="text"/>
Email Address	<input type="text"/>
Telephone	<input type="text"/>
Address 1	Demo lane
Address 2	<input type="text"/>
Address 3	<input type="text"/>
Address 4	<input type="text"/>
Village	<input type="text"/>
Town	Demotown
County	Not applicable
Country	United Kingdom
Postcode	ex16 4jq

User login: These details will be sent to the user.

Username (eg email address)	<input type="text"/>
Password	<input type="password"/>
Repeat password	<input type="password"/>

Sims settings (Choose a setting determining whether the users purchases are to go via Sims Content Ordering)

Do not use Content ordering (order on Credit Card)	<input checked="" type="radio"/>
Always Order using Content Ordering	<input type="radio"/>
Select a user from the list to be the approver for this user. Content orders will be sent to this users email address.	Bursar Money(schoolbursar) ▼

 SUBMIT CHANGES

4.3.1 Note that you can change the pre-filled in address field to ensure that Orders for that staff member go to a particular address e.g. “Science block”

4.3.2 You have the option to allocate any staff member to card or Content Ordering

At the bottom of the set up page is a field to specify the person who will approve the Content Orders of this staff member*. This means the person whose email address is to receive the XML file. As bursar/administrator, you will normally set approval to be via yourself-although the system allows other options.

4.3.3 Many staff will be familiar with using Amazon.com, Tesco.com etc, so compiling a Content Order will probably seem straightforward to these individuals. There is, however, a comprehensive guidance sheet for any staff constructing Content Orders- see Appendix –which it is suggested you copy and circulate to all who may use Content Ordering.

4.3.4 As the school must have set up an account with the companies involved first, for Content Ordering to work, one suggestion is to post up the current list of “active” suppliers for your school on a notice board. This list may be developed from an approved list from your authority, or from the current school suppliers. Requests for local companies to join the system – see section 3.0 – will probably involve help from your local @Schools Advisor. You may call 08709 100 500 at any time to request contact with him or her.

4.3.5 Content Orderers should change their initial password to one known only to them at their first login. We suggest you remind them of this as it is important.

- **Remember, the final outcome of staff creating a Content Order will be an e-mail to you with an XML attachment for you to import in FMS**

5.0 Importing Supplier Catalogues into SIMS FMS

- 5.1 If, as the bursar/administrator you will be creating orders when not connected to the Internet, it is easier and more accurate to have the catalogue of your favourite suppliers available within SIMS.
- 5.2 From time to time @Schools distributes CD ROMs containing a range of supplier catalogues. Supplier's most up-to-date catalogues will, however, always be found downloadable on the @Schools site (see 5.3). You may download the catalogue of **any supplier with whom you have an account**. If you have not set up accounts on @Schools with your suppliers already, please read section 3.0 of this manual now.
- 5.3 Log into @Schools as usual. Go to the Administration area and click on "Download catalogue to SIMS" and click on "download" for the supplier(s) required. You can then import the catalogue file into SIMS according to your usual instructions.
- 5.3.1 If you do not have an account with the chosen supplier you will be invited to apply for an account.



@Schools ADMINISTRATION

CAPITA Business Systems **sims** authorised partner

HOME SUPPLIER CODES VIEW/EDIT USERS SIMS EMAIL ADDRESSES **DOWNLOAD CATALOGUE TO SIMS** REQUEST SUPPLIER ACCOUNT

download catalogue

Downloadable catalogues.

If you have SIMS FMS, then you can download catalogues from the following merchants. In order to do this you must have set up an account relationship with the supplier on the @UK PLC system, so that we are able to process the orders from SIMS. If you have not already done this you will be redirected to screen to make an account application when you click on the download links below

Company Name	Description	Action
Davies Sports	sports equipment	Download
Step By Step	educational aids for under 8's	Download
Galt Educational	educational toys	Download
Hope Education	educational supplies	Download
Philip Harris Education	education supplier	Download
NES Arnold	education supplies	Download
Commercial Ltd	Stationery and office supplies	Download
Superstickers	Suppliers for all your educational rewards. Our range covers stickers, stampers, Targeteers, Beacons for Behaviour, certificates, bookmarks, customised stickers, customised stampers, pencils, erasers and Modern Language products.	Download

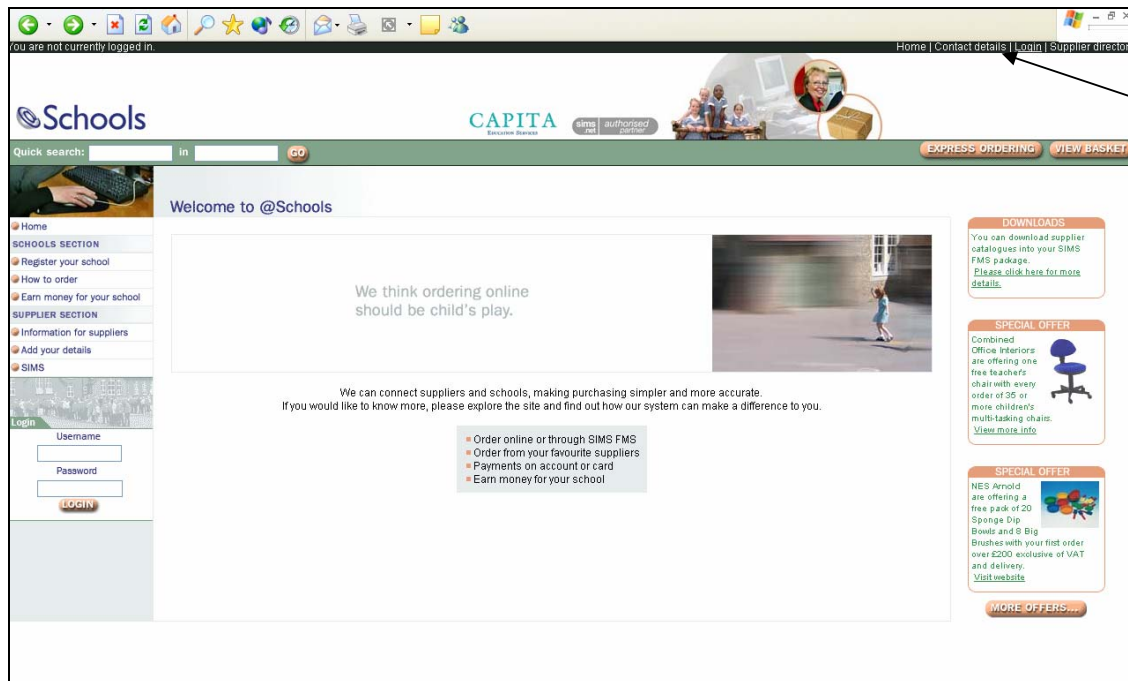
Guide for Staff authorised to create Content Orders.

You are used to looking at supplier's paper catalogues or websites, creating a list of items which you would like to see purchased and handing this recommended order over for review/ rekeying into SIMS. Our school will now be using a new online method, which has many advantages.

- **Saves time** When you have created your recommended order (called a "Content Order") onscreen, it can be passed straight into our SIMS-FMS financial system. There is no delay for re-keying, and no chance for error in misreading your writing!
- **Anywhere** You can create a Content Order anytime, anywhere. All you need is access to the Internet - at work or at home, even on holiday if you wish.
- **Secure** You have your own personal logon/password, and that's the only one you need to order from all suppliers we have set up. (See supplier list attached or the notice board)
- **Easy** Just follow the simple instructions below.

1.0 Go to www.schools.plc.uk - which you should make a "Favourite".

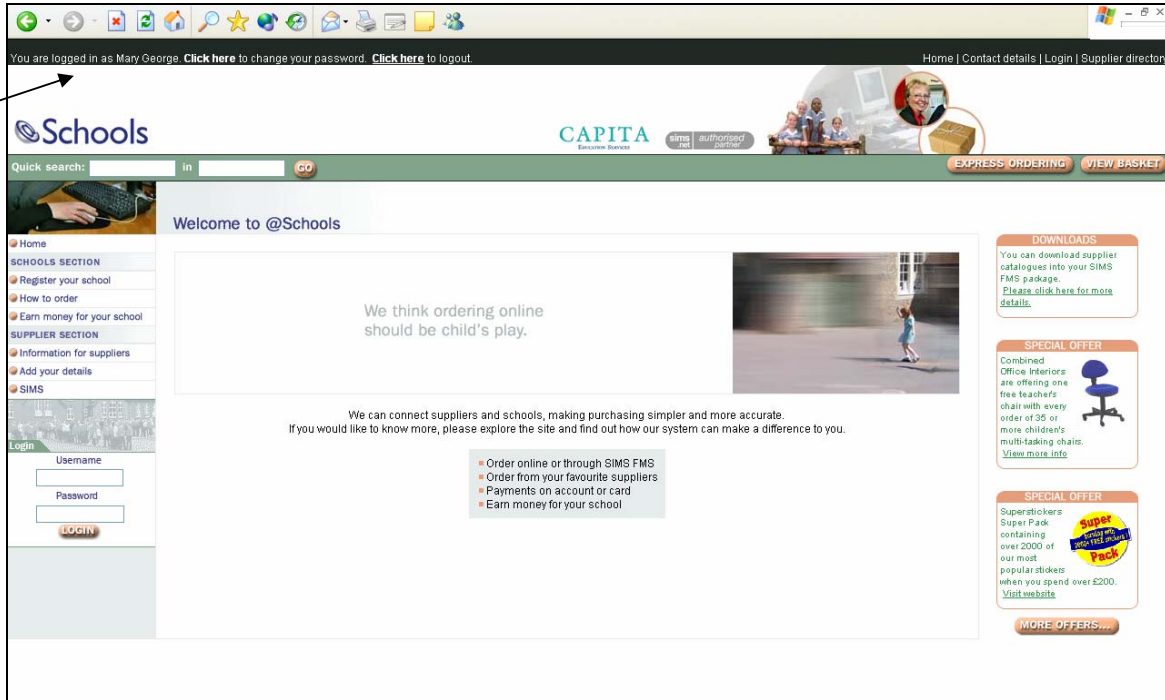
2.0 Click on "log in"(one of the sections in the black bar, top right of the screen)



3.0 You will see a screen which asks you for your username and password. " Log In "

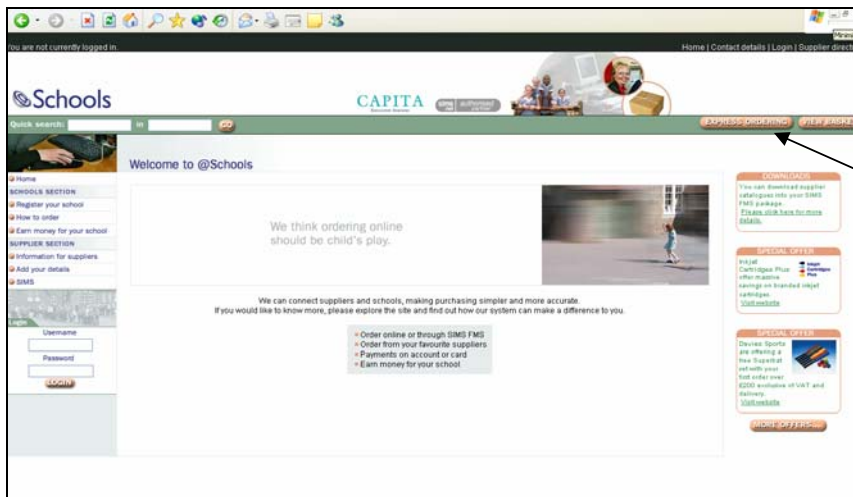
NB For your security, if this is your first time on the @Schools system login using the username and password you were given by the school administrator and then **change your password** using the facility next to your “welcome” in black at the top left of the screen.

Note that the user is now logged in

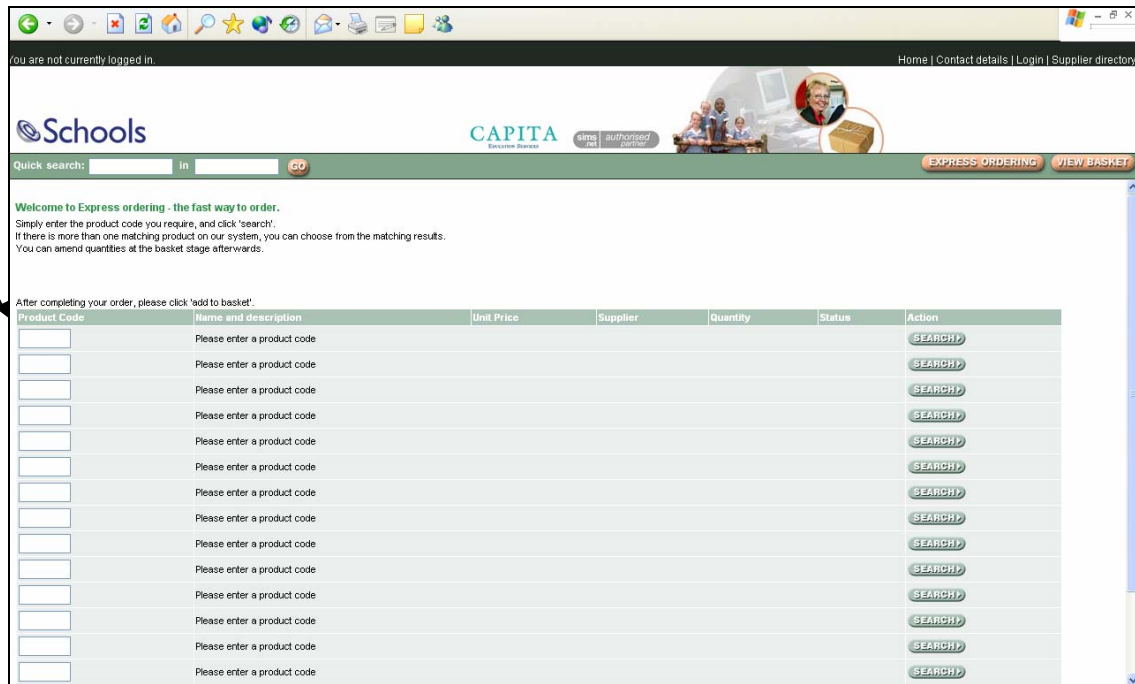


4.0 If you have paper catalogues (or price lists or advertising flyers) from suppliers that your school has an @Schools accounts with, one way to create a Content Order very quickly is by using “Express Ordering”.

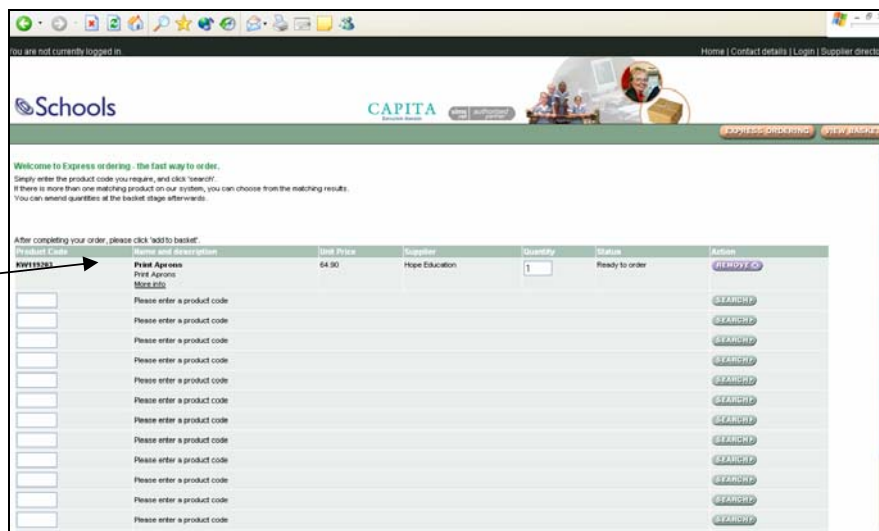
The Express Ordering box is at the top right of the @Schools web site:



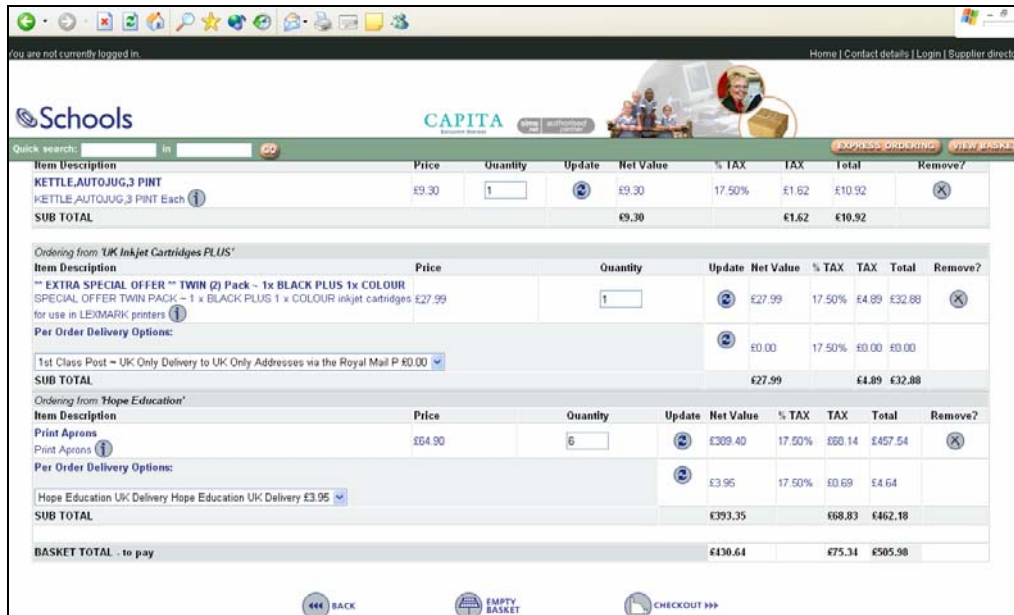
Clicking on the Express Ordering button will bring up an order pad to enter the code numbers of the items you require (The @Schools system will recognise which supplier of each item from the product code. If two suppliers happen to use the same product code, it will show you both items and ask you to confirm which is the correct one)



As an example, entering a code KW119203 (PVC Aprons from the Hope catalogue –beware don't put any gaps if the supplier doesn't) into the first white box and clicking on “search” - the green button to the right - finds the item and puts it in the basket. The quantity can then be left as one, or increased as desired.(there is also a purple button to remove an item if you change your mind)

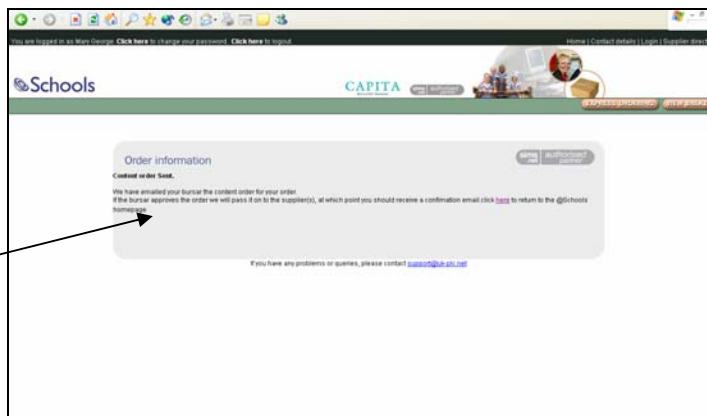


Let's increase the quantity of aprons to 6, add a pair of Lexmark cartridge from Inkjet Cartridges Plus (product code RSLX-1970/80), and a kettle from Devon Purchasing (product code 54.9401). We confirm this Content Order by clicking on the "Add to basket" at the bottom of the Express Order page and the basket has been filled with the items requested.



The basket shows the cost of each item, plus any carriage charge (you can of course often minimise carriage charge if you order off one supplier where this is practical). At this point you can alter the quantities of any item and update the basket. You can also click on the "Express Ordering" button, return to the Express Ordering page and add more items if you wish. When you are happy with a Content Order, click on Checkout, This will take you to a further final confirmation screen. If you are happy with your Content Order then click on "Make Payment"

NB Don't worry, this is a standard message. The system knows you are a Content Orderer .You will see screen confirmation your Content Order has passed to your administrator for approval.



5.0 Every supplier on the @Schools system also has an onscreen catalogue, and you may prefer this method of creating a Content Order. Any company the school has registered on @Schools as a supplier can be found and items added to a Content Order. In this example, we are using a dummy company called SARG (Ltd) Typing their name in the left hand Quick search box and clicking on “Go” brings up their company reference:

The screenshot shows the @Schools website interface. At the top, there is a search bar with 'SARG' entered in the 'Find' field. Below the search bar, there are navigation links for 'View basket', 'Browse by category', and 'Add Search box'. The search results are displayed in a table format. The first result is 'Add a Product page with pictures' with a description: 'Put your product to the top of the search by adding it to the @UK PLC Directory for only £10 per month. More information' and the company '@UK PLC The Internet Blue Chip'. Below this, there is a section for 'Basic Listing Companies matching "SARG" in " now showing page "1"'. This section contains a table with columns for 'Company', 'Location', and 'Description'. The first entry is 'SARG Limited' with the phone number '01169637000' and location 'Bedford'. The description for SARG Limited states: 'SARG is a company specially set up to test school ordering using the latest Content Ordering methodology devised by @UK PLC in conjunction with Capita Education Services'. Below this, there is a section for 'Web listed Companies matching "SARG" in " now showing page "1"'. This section contains a table with columns for 'Company', 'Location', and 'Description'. The first entry is 'Sarges Cafe' with the phone number '020 7224 0259' and location 'London W11'. The description for Sarges Cafe is 'Address / Add more information'.

- Clicking either on the company name or “Full details” brings you up the full SARG company screen

The screenshot shows the SARG Limited company page on the @Schools website. The page has a blue header with the company name 'SARG Limited'. Below the header, there is a navigation menu with links for 'HOME PAGE', 'OUR PRODUCTS', and 'CONTACT DETAILS'. The main content area contains text about SARG Limited, stating: 'SARG Limited is a test company established by @UK PLC working in association with Capita Education Services Ltd. The aim of SARG is to allow those in Education to test the new Content Ordering methodology which makes school ordering easier, quicker and yet more accurate. How Content Ordering works: School staff can access the @Schools site at anytime 24 by 7, and create a suggested order - termed a Content Order. This can be an order to any one or more of the suppliers on @Schools* with which their school has an account. @Schools will automatically apply the correct contract prices where these exist. When completed, the Content Order will pass automatically into the SIMS-FMS (v.6.76) financial system of the school for approval or amendment. The approved order can then be sent electronically to the supplier(s) concerned. As NO RE-KEYING has taken place at final order stage, there is less time needed and vastly reduced potential for error. Suppliers can deliver the right items faster and at less cost to them. *An alternative to the general @Schools portal is a specific County Portal for all the schools of an authority. This makes it easier to highlight county contracts and give county-specific information.' On the left side of the page, there is a search bar with the text 'SEARCH Powered by @UK PLC' and a search input field with the placeholder text 'what are you looking for?'. Below the search bar, there is a 'GO' button.

The company's products can then be brought up by clicking on the relevant listing:

The screenshot shows the 'SARG Limited' product listing page. The page features a navigation menu on the left with links for 'HOME PAGE', 'OUR PRODUCTS', and 'CONTACT DETAILS'. Below the navigation is a search bar powered by UK PLC. The main content area displays a list of products in a table format. Each product entry includes a product name, a description, and a 'More information' link. The products listed are: Secret powered running shoes, The Beefy Bat, The David Javelin, The IanRS Relay Baton, The Princess Football, The Super Sack, and The Super Whip Pole. The 'The IanRS Relay Baton' product is highlighted in blue.

Product	Description
Secret powered running shoes	These running shoes conceal a small but powerful motor. Flick as switch and you will leave the rest of the field behind. Not so much cheating as using your brain.. More information
The Beefy Bat	The Beefy Bat. A combination of Willow and Concrete. More mass where you need it, every hit a guaranteed four More information
The David Javelin	The most powerful Javelin in the world. NOT to be used if your school is under a main flightpath More information
The IanRS Relay Baton	Pass your problems over to someone else with this excellent relay baton More information
The Princess Football	A tribute to our most famous sportsman's spouse. Stitched with a used thong and able to receive text messages More information
The Super Sack	The finest Teflon and Woolsack. Slip to victory and become Lord Chancellor in one afternoon. More information
The Super Whip Pole	If you think you've seen pole vaulting, think again. With training any good athlete can leave the stadium using this pole. NOT Available to HM Prison Sports Facilities More information

Any item can be selected for your Content Order by clicking "Order this product" (NB check the quantity you wish to order is correct)

The screenshot shows the product detail page for 'The IanRS Relay Baton'. The page includes a navigation menu on the left, a search bar, and a main content area. The main content area features a product image of three athletes running on a track. Below the image is a description of the product: 'Pass your problems over to someone else with this excellent relay baton. A mixture of Aluminium and Balsa for lightness and strength.' To the right of the description is a table with columns for 'Product', 'Description', 'Part numbers', 'Unit price', 'Quantity', and 'Add to Basket?'. The 'The Over to You Baton' is listed with a unit price of £ 9.99 and a quantity of 1. A 'Back to product list' link is located below the table.

Items					
Product	Description	Part numbers	Unit price	Quantity	Add to Basket?
The Over to You Baton	Just when things get difficult- give it to someone else..	Part number (1): IRS001	£ 9.99	1	Order this product...

[Back to product list](#)

- This places the selected item in your basket:

Ordering from 'SARG Limited'

Item Description	Price	Quantity	Update	Net Value	% TAX	TAX	Total	Remove?
The Over to You Baton Just when things get difficult- give it to someone else..	£9.99	<input type="text" value="6"/>		£59.94	17.50%	£10.48	£70.42	
SUB TOTAL				£59.94		£10.48	£70.42	
BASKET TOTAL - to pay				£59.94		£10.48	£70.42	

Navigation buttons: BACK, EMPTY BASKET, CHECKOUT

powered by SiteGenerator3

- Clicking on “Back” in the basket page will return you to the same (SARG) company site to select other items, or use the Supplier Directory –top right- on the basket page to find another of our suppliers
- When you have selected all the items you wish to be ordered, and are sure the quantities are correct, then proceed to “Checkout” using the bottom right-hand button as when Express Ordering.

Ordering from 'SARG Limited'

Item Description	Price	Quantity	Update	Net Value	% TAX	TAX	Total	Remove?
The Beefy Senior A Full size Adult Bat. Unliftable without 2 years of weight training	£49.99	<input type="text" value="3"/>		£149.97	17.50%	£26.24	£176.21	
The Over to You Baton Just when things get difficult- give it to someone else..	£9.99	<input type="text" value="6"/>		£59.94	17.50%	£10.48	£70.42	
SUB TOTAL				£209.91		£36.72	£246.63	
BASKET TOTAL - to pay				£209.91		£36.72	£246.63	

Navigation buttons: BACK, EMPTY BASKET, CHECKOUT

powered by SiteGenerator3