Bromcom Update Session

We will start shortly.

This session will be recorded and shared with colleagues after the session. By attending you agree and accept you may be captured in the recording.

Bromcom update and info

Coventry ICT & Digital

Welcome

- We are going to cover some general Bromcom FAQs, we will start with MIS and then move to Finance.

- Feel free to ask questions throughout either in the chat or put your hand up.

- We will share these slides and the recording after the session.

- There will also be time to ask questions at the end of the session.

The story so far

- 45 Schools & Settings
- 17,419 Students
- 3,157 Staff
- 3 Migration groups over 3 weeks
- 6 Face to Face Training Sessions with 150 places!
- 28+ Training Sessions
- 854+ Training Session bookings
- 361 Service Desk Calls (in last month)

Well done!

- You have all done an amazing amount of work over the last few weeks

- Many staff have worked extra hours (including at Bromcom and in corporate teams)

- For some of you this is only your **2nd week** of using Bromcom for others it's only your **5th!**

- You should be proud of what **you have achieved**

- There may be more to do, but we will do it together

Thank you

- Please keep your tickets coming in

- No ticket is too small

- There are no stupid questions

- Thank you for your patience while we work through them

- We are all learning

Falling Behind?

Don't worry! We are here to help.

Help us to help you

- When raising a ticket
  - As much detail as possible
  - Let us know what you were trying to achieve (not just what you were doing)
  - Your name (especially if emailing from admin@...)

Dietary Needs & Kitchen Report

- If your Kitchen Statistics report is showing 'undefined' you need to setup your lookups for Medical Condition Types

- Bromcom stores medical conditions with food allergies, dietary requirements and other allergies etc

- Setting up your Medical Condition Type will allow you to send only relevant information to the kitchen.
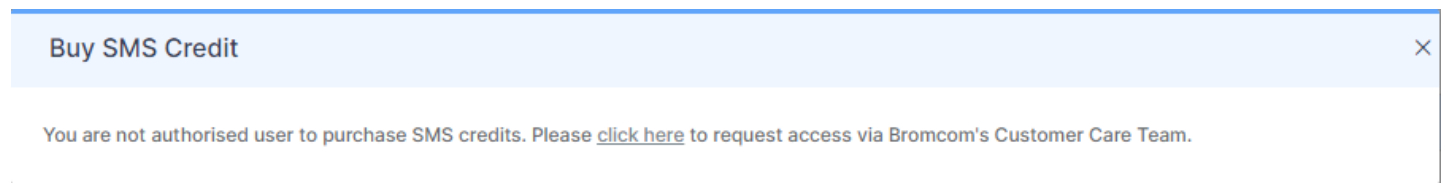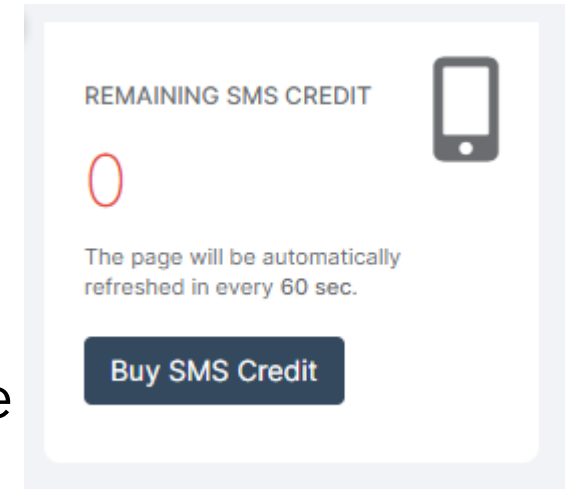
Dietary Needs/Medical Conditions Types

Undefined

While we are still on dinners

- If you use menus in Bromcom you can send a list of the food requirements to the kitchen on the same Kitchen Statistics report (you probably all know this)

- Parents can choose the meal they want and can switch between a school meal and a packed lunch if you so desire on different days.

- **Are your parent's getting alerts for low balances even though they may be free school meals?** You can set your MCAS balance reminder to **-£1** then Bromcom will alert once the balance is negative.

Buying Text Messages

REMAINING SMS CREDIT

0

The page will be automatically refreshed in every 60 sec.

Buy SMS Credit

- You can purchase text messages via the Bromcom interface

- Modules > Communications > Overview

- You will need to be setup to buy messages

- If you want to buy an unlimited bundle you will need to send a purchase order to Bromcom

- Prices can be found in your quote

Buy SMS Credit   ✕

You are not authorised user to purchase SMS credits. Please click here to request access via Bromcom's Customer Care Team.

Incoming Text Messages

- A standard UK mobile phone number (07) can be allocated to your Bromcom system for you to receive text messages on.

- This is part of your Bromcom package, if you would like this please email schoolsict@coventry.gov.uk to request one.

- So far this is enabled in **10** schools!

Admissions and Transfers Files

- You can download an ATF from the Admissions Portal and Import that Into Bromcom

- You can download an ATF from CCC's Admissions Portal

- https://docs.bromcom.com/knowledge-base/how-to-admit-students-using-atf-and-ctf/

- Admissions have provided a document which talks you through the process of using the portal.

Downloads-Moving to secondary: DOB 01/09/10-31/08/11

A&T Export: ATF-File

Student selection from EMS
- All Allocated and Provisional Students(Allocated / Accepted / Provisional)
- All Allocated Students(Allocated/Accepted)

Download

Single Sign On

- A way of using your Office365 or Google account to access Bromcom

- Reduces the numbers of usernames and passwords that you need to remember – and the number of password resets you may have to help with!

- We can turn this on for some or all of your staff.

- SSO staff will lose the ability to login with their username and password

- SSO staff will need to set a PIN number too.

'Installing' Bromcom as an App

- You can install Bromcom in an app window on your device.

- From Microsoft Edge click the three dots, then Apps, and Install this site as an app

- An icon will be placed on your desktop and Bromcom will be given its own main window.

- In some cases new windows will open where Bromcom would have opened a tab
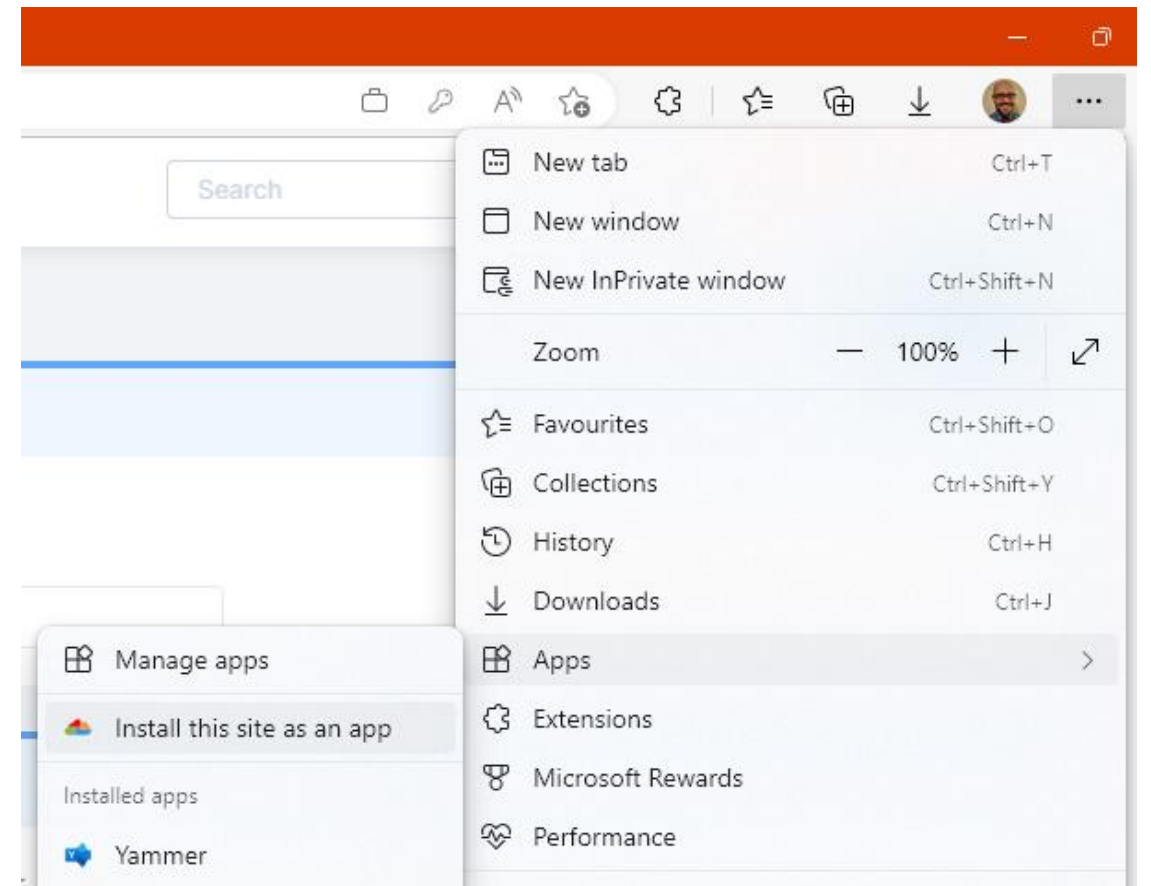
Data Security : A Reminder

- As Bromcom is cloud based, keeping on track of data security is a bigger importance than ever

- You should
    - Remove user accounts for people who have left as soon as possible. Get into the habit of adding an end date to a user's record as soon as you know they are leaving
    - Remember to delete downloads from your devices regularly if you have downloaded spreadsheets or other information from Bromcom
    - Remind staff that when logging onto Bromcom from a personal device that they are responsible for ensuring they log out and that the delete any downloaded data.
    - Consider using time and location based restrictions to prevent staff from logging on during unsuitable times or locations
    - Review permissions on a regular basis to ensure that the right staff have the right access – work on a 'least access required basis's
    - Restrict access to the 'administrator' group to a very small number of people

Roles and Permissions

- There are few built in roles and permissions

- Steer clear from making changes (wherever possible) to built in roles, instead setup your own. You can Export and Import a role to create a copy of it.

- When you have changed permissions you may need to close and reopen the browsers for them to become completely active.

- We will be running a session soon to give more guidance on permissions

- We will setup some permission groups for school to use to perform specific tasks – let me know if there are any you would like

- We can roll out permission groups across all schools – which will save you from re-inventing the wheel.

Centralised Users and Roles

| User and Role	What can they do
EFSFA – CCC Schools Finance Assistant	Full Access to finance module and finance reports only. Access to equipment register and access to base pay mapping. No access to staff or pupil information.
EFFIN – CCC Schools Finance Officer	All access to Finance module. No access to pupils. Access to staff personal details and save, access to contracts including editing. Access to reporting for Finance only no access to other reporting areas. Access to Equipment Register (as part of finance module). Full Access to base pay mapping.
CCCAudit – CCC Audit	Read only access to finance data. Still to be created

Centralised Finance Roles

Role Name	What does this permission allow
Read Only	Viewing of some financial reports only
Finance Administration Role	Entry of information which will be authorised by someone else, such as supplier details, PO's, customer details, invoices, etc.
School Business Manager	To input and authorise entries
Approver Only	Authorise the entries input by someone else

Permission groups are still being finalised and we will release these to all schools shortly (likely next week). We will advise when these have been released and you will need to assign roles to individuals.

Available Soon

Switching Roles

- You can have multiple roles in Bromcom
- To switch between your roles click the Profile Image in the top right, then go to Switch Role and choose the role
- TIP: Sometimes staff have been in the wrong role and can't see what they need. Make sure they are in the right role.
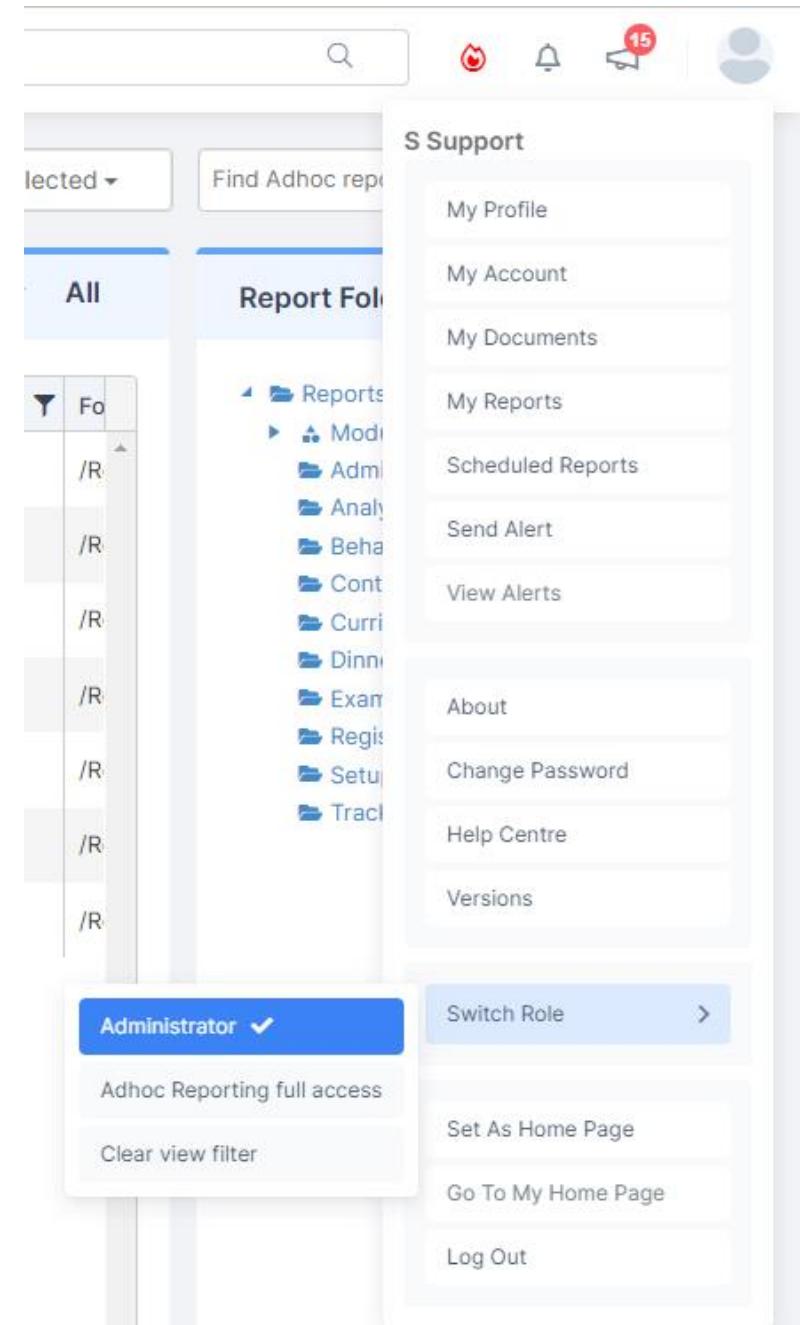
Dealing With Leavers

- To correctly process a leaver, choose the student from the Student menu.

- Click the actions button and then Process Leaver

- This will ensure that the student is correctly made to leave on the system and all memberships are terminated.
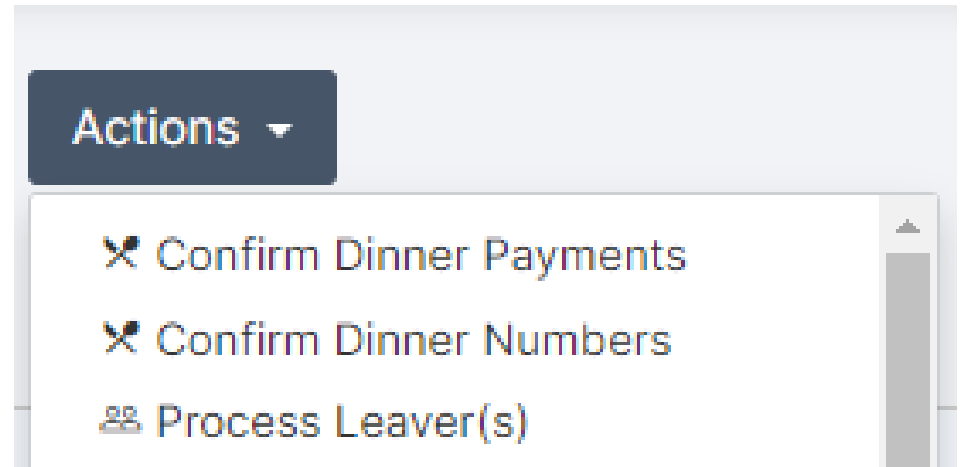
Adding Schools for CTFs

- Your schools will have copied over from SIMS but you may need to set new ones up.

- Config > Administration > Schools

- Search for the school to ensure it doesn't already exist

- You can find school details on the UK Government site Get Information about Schools (GIAS) https://www.get-information-schools.service.gov.uk/

Misc

- Bromcom community is a great place to share best practice and chat with other Bromcom users. Let me know if you haven't yet registered or received your login.

- Email Settings, there are still 18 schools using the Bromcom email service.

- 12 Schools are not yet setup to take payments via MCAS

- Visits by Bromcom staff will end soon

- Admission numbers – these should generated automatically when you add a new student, if they are not generating automatically please contact us.

- KS1/2/Phonics look out for information - session planned 19th June to go through process with Kevin from Data Team (not specific Bromcom training)

- Census session is arranged for Tuesday 9th May

- End of Year sessions will be advised soon

- You can still find recordings of training sessions on the Coventry Schools Go-Live Website https://docs.bromcom.com/knowledge-base/coventry-bromcom-go-live-site/

- MCAS Training videos haven't been shared with CCC yet – we will send these on when we have them

SIMS & FMS

- You are **no longer licenced** for SIMS and FMS

- They are still available and can be accessed to review old data

- Usage of SIMS and FMS will be restricted to one or two accounts in each school

- Should plan to remove SIMS and FMS completely

- You should still ensure that SIMS and FMS databases are backed up.

- If you have not already done so, please remove SIMS, FMS, Discover and Solus from your workstations (leaving one or two machines to access historic data)
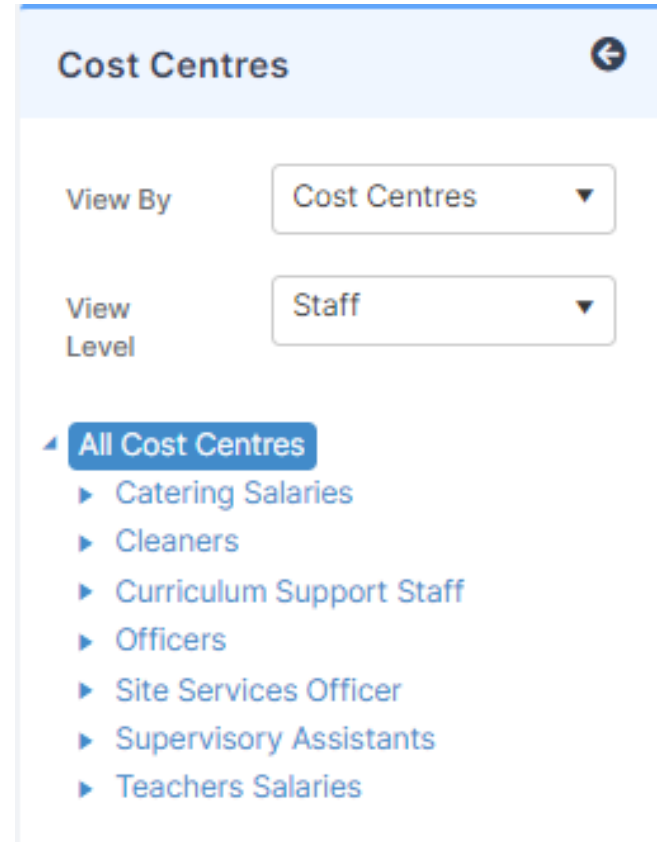
Bromcom Finance

Audit Requirements

- A problem has been identified in the way that Bromcom is recording some audit information in Finance.

- Internal audit and Schools finance are aware, and the issue has been escalated at Bromcom

- You must be especially vigilant at present regarding
  - Payment runs and double checking these before any payments are made
  - Recording of income to ensure the amounts are correct
  - Reconciliations

- Look out for an email regarding further action to take.

Base Pay Mapping and Salary Projections

- Mapping works in a different way to FMS

- Check for any staff whose name is not appearing on the salary projections. Raise a ticket and we will do a remote session and sort this

- Projections FMS v. BROMCOM – not the same – under investigation

- Base Pay Mapping is based on the person's Role. This is also the Role reported on SWC. Take care when allocating to any new staff.

- Training and Guidance on this area will be given in due course but for now raise a ticket with us.

- Apportionments at some schools still need to be done – waiting for a list from SFOs

- National Insurance Categories new in BROMCOM Staff

Salary Download

- Hoping to change the way you will receive the file to direct to your system

- The April salary download will not be made available to you at the usual time

- Plan -
  - Webinar to show the process of import **Tuesday 23rd May** 10.00am
  - April file made available to be processed while fresh in the mind
  - May file to be made available at the beginning of June as normal

- Items may fall into suspense if we haven't got the mapping quite right.

Suppliers and Deliveries

- Supplier has to be marked to process deliveries

  ☑ Process Delivery Notes For Supplier

- In line with CCC audit policy, Bromcom will be applying this tick for all suppliers. This will happen on **Friday 5th May**.

  NOTE: If you have not yet imported your suppliers you need to have done this before then or you will have to do the process manually.

Bank Reconciliation

- SFO has to add your opening balances before you can do a bank reconciliation. This will not be done until year end is finalised.

- You can look at it and check that items are showing but cannot reconcile it until there is an open balance added.

Direct Debits

- If you pay suppliers by direct debits a guidance note is being prepared on how this can be done in Bromcom

Cheque Definition

- There is an issue on the cheque definition set up that Bromcom are investigating

- Parameters cannot be saved because of the reason "Supplier advice cheque no top should be between supplier advice boundary and cheque boundary"

- the School advice/supplier Advice boundary - cannot currently be set above 10

- It should make no difference when printing cheques

Cheque Books

- In Bromcom, cheque books have to be added in numerical order, therefore if you have a separate manual cheque book this cannot currently be added as the numbers are not sequential.

- If you need to have a manual cheque book added to your system, please raise a ticket, giving us
  - the Bank Details (as on your system)
  - The Start Number
  - The End Number
  - The Next Cheque to be used Number

- We will then raise a case for a data fix. We hope that the system will be amended to allow for this in the future
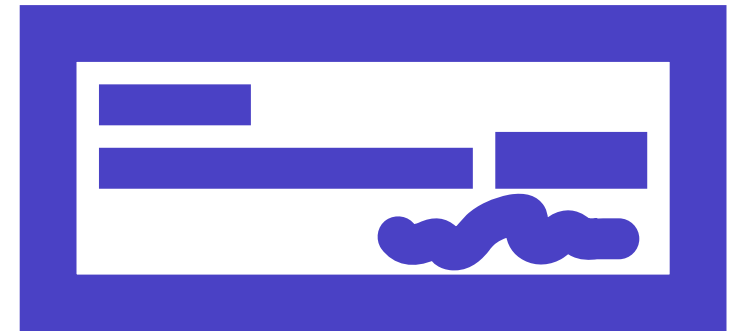
Write Off

- There is currently no facility to do a Write Off of an Accounts Receivable invoice in Bromcom

- This has been raised as an issue with Development

- Should not be an issue at this time of year

- Audit advice is to hold back on doing any Write Offs for the time being

- Further guidance will be issued in due course

Purchase Order Definition

- To add additional items to your orders, you need to double click on the relevant line, which will open a box to add this tick in.

Purchase Order Definition - Details Section

Included	Seq	Data Item
☐	1	Cost Centre Description
☑	2	Item Description
☑	3	Part Number
☑	4	Unit Cost
☑	5	Quantity Ordered
☐	6	Contract Number
☑	7	Discount %

Purchase Order Details Column

☐ Included on purchase order

Sequence (left to right) — 6

Data Item — Contract Number

Printed Header — Contract

Content Type — Text

Column Width in mm — 14

Save   Close

Finance Drop in Session

- Following feedback and the success of the Finance Drop in Session on Monday 24th April we have arranged an other session for you.
- **Wednesday 10th May** 2.00pm – 3.30pm
- Book via BookWhen
- Bromcom Finance staff may also call you to check all is well

User groups

- We will be arranging an in-person user group with Bromcom staff during May

- We are also looking to arrange our conference for June

- Look out for more information.

Questions

- Over to you, pop a question in the chat or ask using your microphone

- Please keep your questions generic

- Any questions that require a more in-depth response please email schoolsict@coventry.gov.uk

Thank you

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