

SIMS and FMS Eligibility Check

User Guide

Contents

Introduction	1
Receiving the Annual Entitlement Eligibility Key	2
Applying the Eligibility Key in SIMS	2
Applying the Eligibility Key in FMS.....	5
Process Steps	8
Flow Diagram	10
Links to other useful resources	11

Introduction

The Spring 2022 release of SIMS and FMS has moved to the 4 April 2022 to support the release of our SIMS Next Generation programme. As part of this release, we will be checking that customers are entitled to use the software updates included in the release.

This annual entitlement eligibility check ensures that SIMS and FMS software updates can be used only by schools that have or had an annual entitlement agreement that was current at the time the software update was released.

The eligibility check will not affect the release upgrade process itself, whether delivered via SOLUS or ISO, which can be carried out as normal.

SIMS customers without current annual entitlement agreements will not be able to access or use the Census menu option in SIMS, since this has been updated as part of the Spring 2022 release and FMS customers without current annual entitlement agreements will be unable to access the CFR menu option, which has also been updated in the Spring 2022 release. In both cases, the successful application of a valid eligibility key will re-activate the appropriate functionality in SIMS and FMS. All other menu items will function normally.

If your school does not have a current annual entitlement agreement, then to obtain an eligibility key, you will need to accept ESS' annual entitlement agreement terms either via our online web contracting portal or by paying our annual entitlement service invoice. If you accept the terms through ESS' web portal, it will take approximately two business days to register your new contract, for the eligibility check to kick in and an eligibility key email to be sent. If you accept our terms by paying our invoice, it can take up to 10 business days to process your payment, register your new agreement and for the eligibility check to kick in, and an eligibility key email to be sent.

Local Authority maintained schools that have relied on their Local Authority SIMS or FMS licence to allow them to use ESS software should be aware that in many cases, these licences have now expired. If this is the case, you will only be entitled to use SIMS or FMS if you have accepted ESS' annual entitlement agreement terms, which include a new licence, or have purchased a new SIMS and/or FMS licence from ESS.

The eligibility check has been designed to be as automated and invisible as possible.

Receiving the Annual Entitlement Eligibility Key

The eligibility check should be invisible to most customers that have a valid annual entitlement agreement with ESS, and will be performed automatically and in the background. However in some cases, users may be prompted to enter a unique eligibility key, which ESS will supply by email to all customers with current annual entitlement agreements in advance of the release.

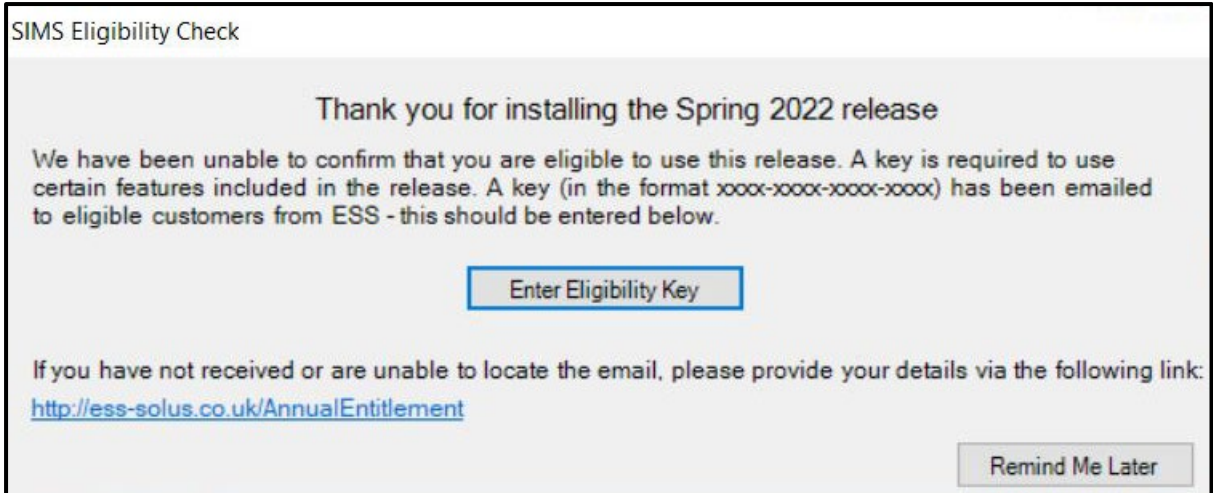
Independent, International and Free Schools will also receive an eligibility key during the same time period to re-enable the functionality they are eligible to use.

If for any reason you misplace this eligibility key, you can request a replacement using a simple form. Details of how to do this will be displayed by the software in the event that you are required to enter an eligibility key.

Applying the Eligibility Key in SIMS

Entering your Eligibility Key

1. Upon the Spring release, when a user logs into SIMS, if the automatic eligibility check is unable to provide a positive reply, they will be presented with the following information window.



SIMS Eligibility Check

Thank you for installing the Spring 2022 release

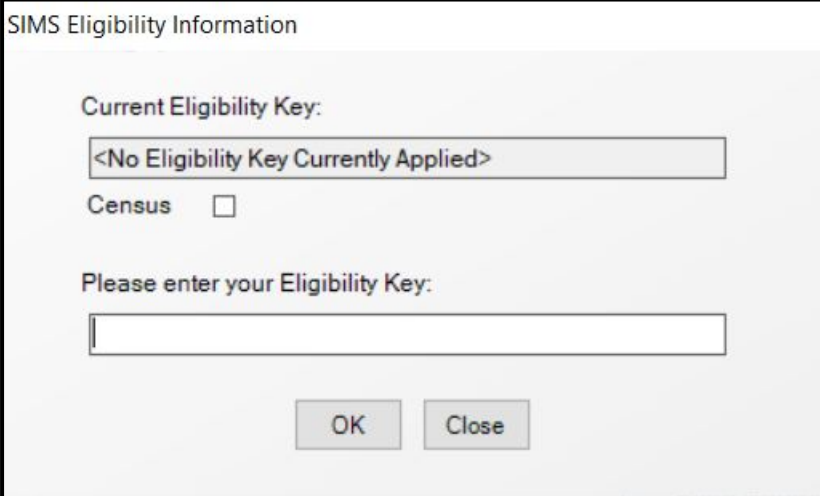
We have been unable to confirm that you are eligible to use this release. A key is required to use certain features included in the release. A key (in the format xxxx-xxxx-xxxx-xxxx) has been emailed to eligible customers from ESS - this should be entered below.

[Enter Eligibility Key](#)

If you have not received or are unable to locate the email, please provide your details via the following link:
<http://ess-solus.co.uk/AnnualEntitlement>

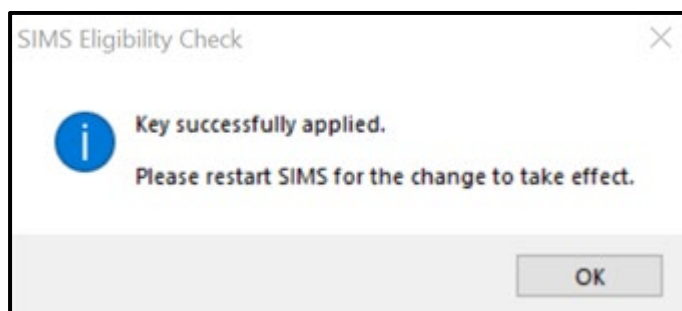
[Remind Me Later](#)

- If they have the eligibility key to hand, they can select **Enter Eligibility Key**.
 - If they are the person to whom the eligibility key was sent, but they do not have it to hand, they can select **Remind Me Later**. They can subsequently choose to enter the eligibility key again on next login or select **Help | Enter Eligibility Key**.
 - If they have not received or are not able to locate the email, then they can request their eligibility key via the link in the pop-up message: <http://ess-solus.co.uk/AnnualEntitlement>.
3. Once the user has chosen to open the **SIMS Eligibility Information** window, they will be presented with the following.

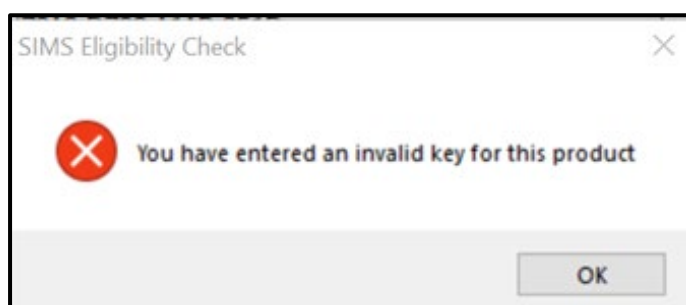


A screenshot of a Windows-style dialog box titled "SIMS Eligibility Information". It has a light gray background. At the top, the title is in a standard font. Below the title, there is a label "Current Eligibility Key:" followed by a text input field containing the text "<No Eligibility Key Currently Applied>". Below this, there is a label "Census" followed by an unchecked checkbox. Further down, there is a label "Please enter your Eligibility Key:" followed by an empty text input field. At the bottom of the dialog, there are two buttons: "OK" and "Close".

5. A valid key will present the user with the following notification.

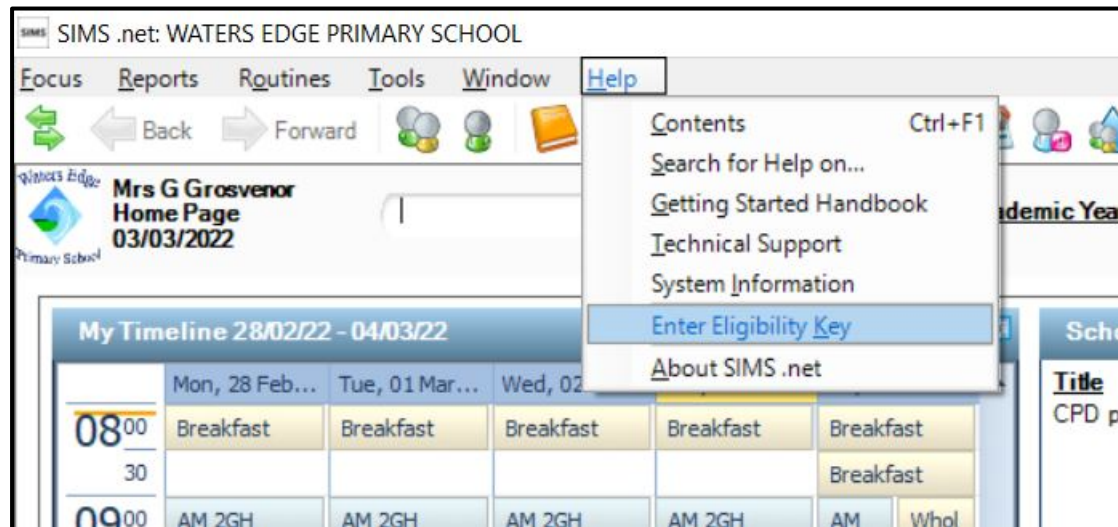


7. If an invalid eligibility key is entered, the user will be presented with the following notification.



Checking your Eligibility Key

1. If you want to check the status of your eligibility key, you can select **Help | Enter Eligibility Key**.



- You will be presented with the following window. In this example, the automatic check has returned an invalid key, i.e. Census is not enabled.

SIMS Eligibility Information

Current Eligibility Key:

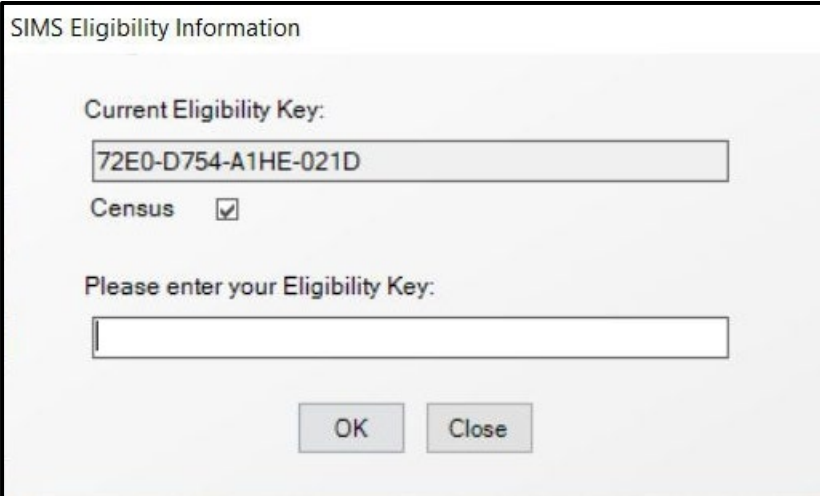
72A0-D722-A1AB-051D

Census ☐

Please enter your Eligibility Key:

OK Close

3. In this example, the automatic check has returned a valid key, i.e. Census is enabled.



The image shows a dialog box titled "SIMS Eligibility Information". It contains the following elements:

- A label "Current Eligibility Key:" followed by a text box containing the value "72E0-D754-A1HE-021D".
- A label "Census" followed by a checked checkbox.
- A label "Please enter your Eligibility Key:" followed by an empty text box.
- At the bottom, there are two buttons: "OK" and "Close".

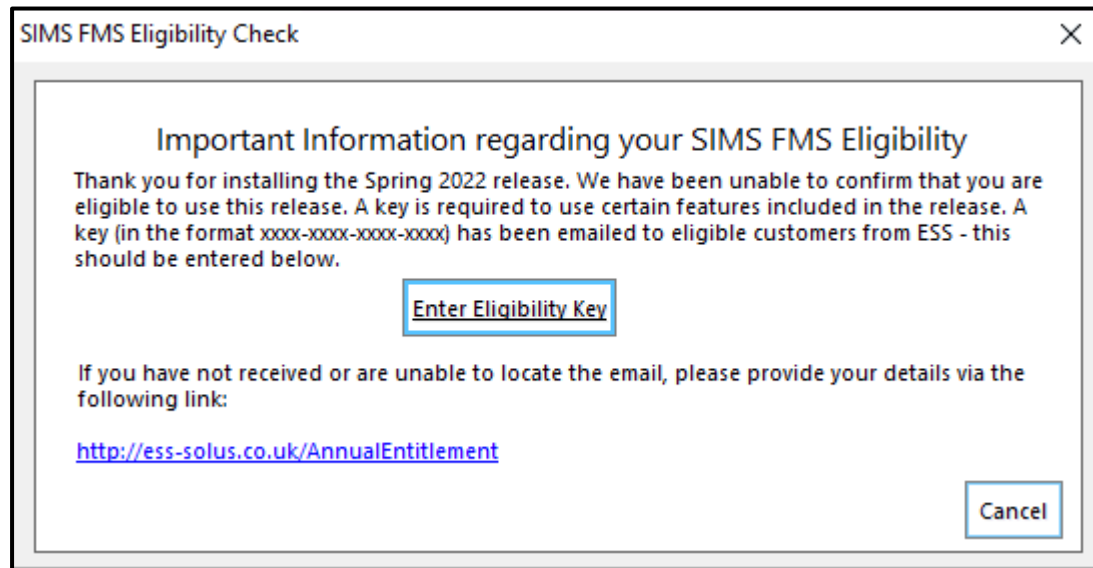
Updating your Eligibility Key

- Copy and paste your updated eligibility key into the bottom box in the **SIMS Eligibility Key Entry** window and click **OK**.
- For the menu route to be updated, the user will need to log out and back in to SIMS 7.

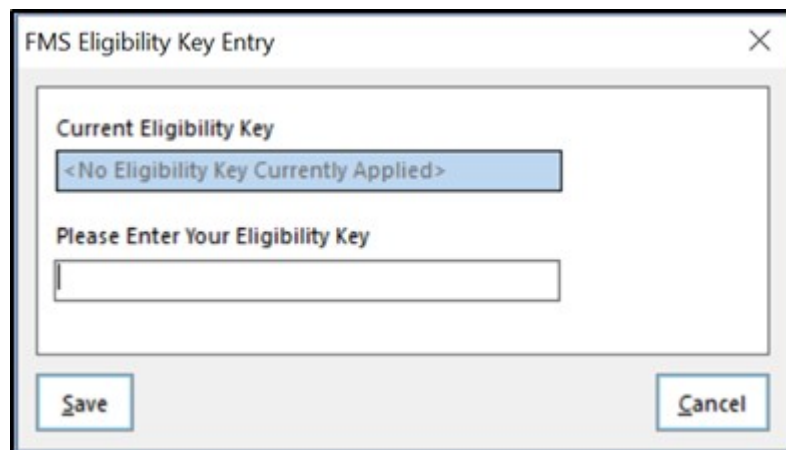
Applying the Eligibility Key in FMS

Entering your Eligibility Key

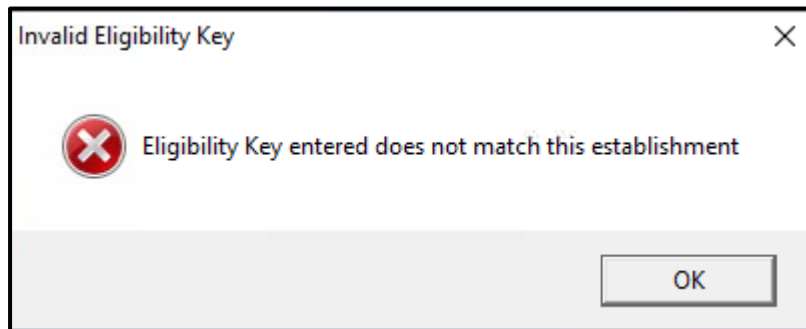
1. Upon the Spring release, when a user logs into FMS, if the automatic eligibility check is unable to provide a positive reply, they will be presented with the following information window.



2. This will also be the point at which the CFR functionality will be disabled. The user at this point has a selection of choices.
 - If they have the eligibility key to hand, they can select **Enter Eligibility Key**.
 - If they have not received or are not able to locate the email, then they can request their eligibility key via the link in the pop-up message: <http://ess-solus.co.uk/AnnualEntitlement>.
3. Once the user has chosen to open the **FMS Eligibility Information** window, they will be presented with the following.

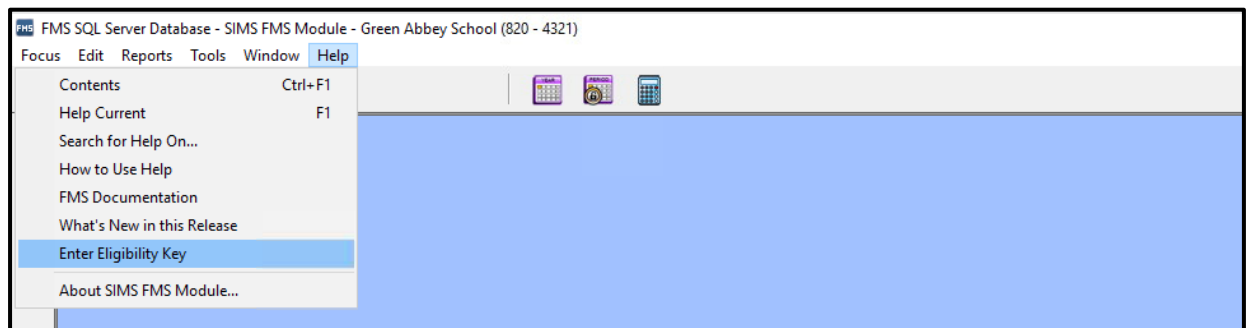


4. The user can now copy from the email the eligibility key and paste this into the window and click **Save**.
5. The menu routes for CFR are now available.

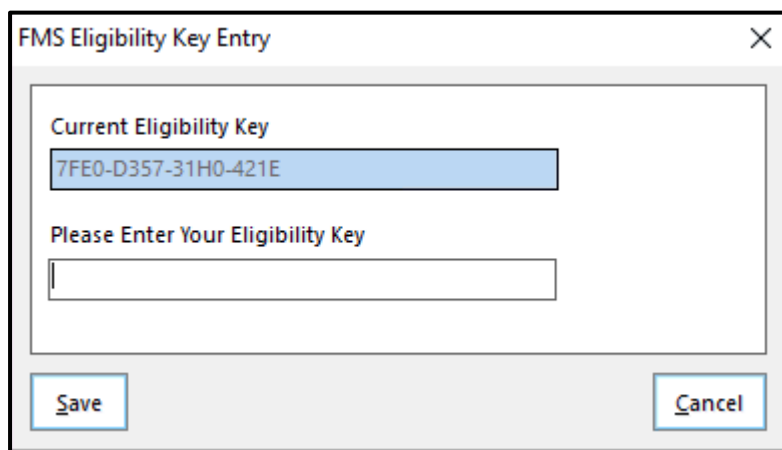


Checking your Eligibility Key

1. If you want to check the status of your eligibility key, you can select **Help | Enter Eligibility Key**.



2. You will be presented with the following window if the key entered is valid, then the CFR menu will be visible to users with appropriate access.



Updating your Eligibility Key

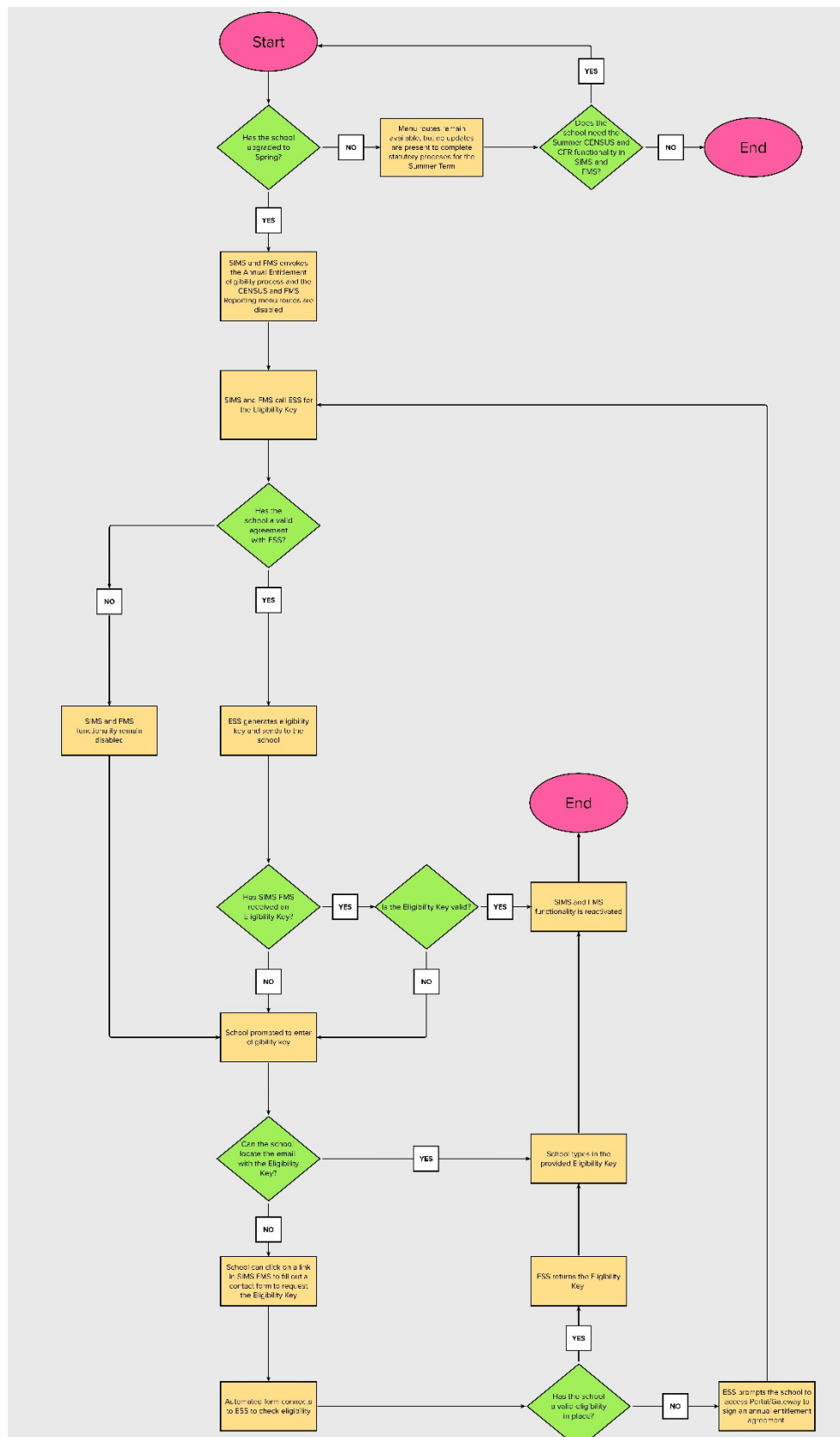
- Copy and paste your updated eligibility key into the bottom box in the **SIMS Eligibility Key Entry** window and click **Save**.

Process Steps

- As a school carries out the upgrade, menu routes will become invisible (greyed out for FMS).
- For both SIMS 7 and FMS, the default position will be off from upgrade until verified.
- On first login following upgrade, SIMS/FMS will attempt an automated eligibility check.
- If the automated check is successful and the eligibility key is valid, then all menu routes are now visible and the process ends.
- If the automated check is successful and the eligibility key is invalid, or the automated check is unsuccessful, then menu routes remain invisible and a pop-up will appear.
- The pop-up will ask for the eligibility key and prompt the user to find email, if possible.
- If the user finds the eligibility key and enters it, then the process ends.

- If the user was not sent an eligibility key or they cannot find it, then a pop-up prompt includes details of how to access an automated form.
- The automated form will ask for the school name, DfE number, postcode, school domain email address and contact name/phone number.
- The automated form will go to ESS.
- If the school has a valid eligibility, then ESS will return the eligibility key to the specified email address.
- If the school has not got a valid eligibility, then ESS will return a message to the specified email address prompting the school to log in to the portal or gateway, using the details held by ESS to specify which URL.
- If the school then signs up, an automated email will be sent from ESS with the eligibility key.
- If the user then enters the eligibility key, the menu routes become visible and the process ends.
- If the user does not enter the eligibility key, then 24 hours later, on first user login, the automated check will recur.
- If the automated check is successful, then menu routes become visible and the process ends.
- If the automated check is unsuccessful, then pop-up re-appears and the user is prompted to fill in the eligibility key from the email sent on sign-up.
- If the user cannot find the email, then the user can complete the automated form to have the eligibility key resent by ESS.

Flow Diagram



Links to other useful resources

- Frequently Asked Questions ([KB0051049](#))
- SIMS Release and Product Information ([KB0035066](#)).