

Data Transfer

SIMS

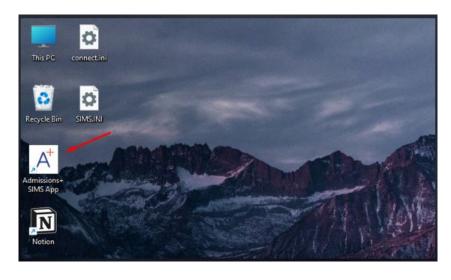
Importing applicant and contact data into SIMS

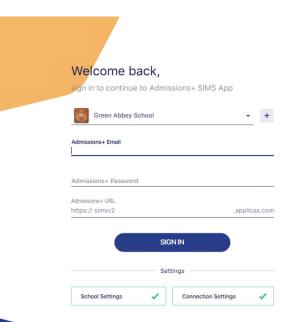
Data is moved into SIMS from Admissions+ using the Admissions+ SIMS App; this guide covers the steps and you can also find this guide on our Knowledge Base.

Prior to being able to import data into SIMS, you need to ensure you have created a **pre-admission group in SIMS** to receive the new applicants into. Your Data Manager will be able to help you with this if you are unfamiliar with how to create a new pre-admission group.

LOGIN

Load the **Admissions+ SIMS App** - it is installed as an app on your desktop/the desktop of whomever installed the App and looks like this:

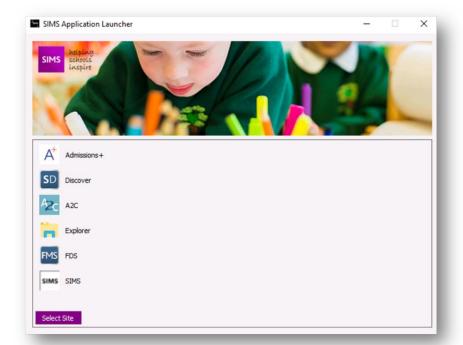


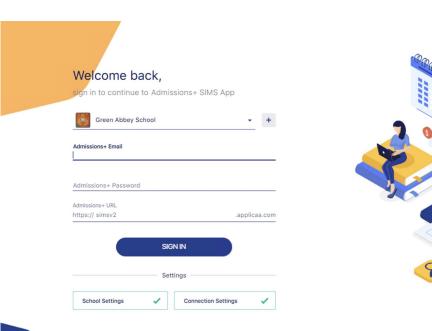




LOGIN

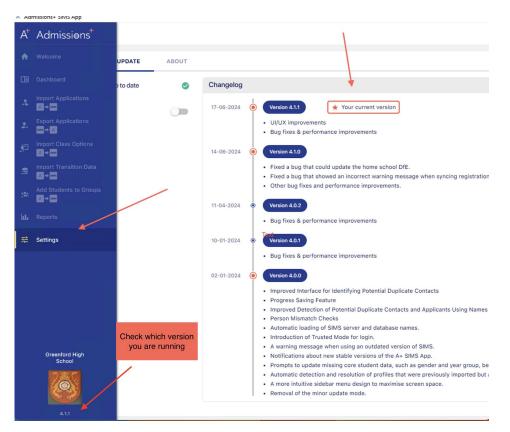
For SIMS connected you will need to raise a ticket with ESS Service Desk requesting to have the access to Applicaa's Admissions+ SIMS Application enabled in SIMS Connected. See our SIMS Connected knowledge base article for more information





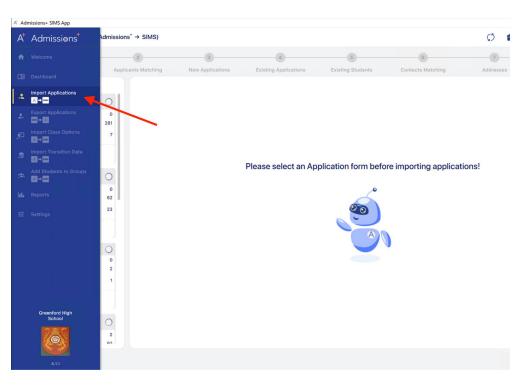
Check your settings before beginning your import

IMPORTANT: check under "settings" in the left-hand menu that you have the latest version of the App installed; your App should auto-update but if you are on an older version please update before attempting your import.



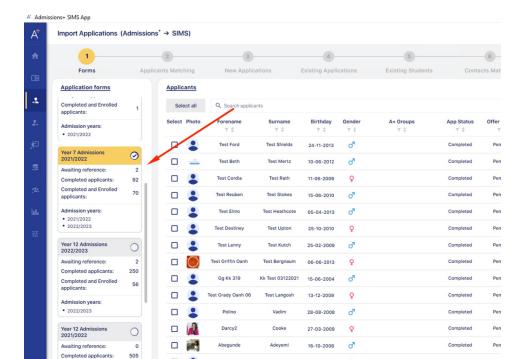
Choose the "import" option

Click the icon to Import Applications from A+ to SIMS



Confirm which dataset you want to import data from

Step 1 (Forms) - Choose the application form you wish to import data from; all of your active forms will show in a list on the left hand side of the App, like so:

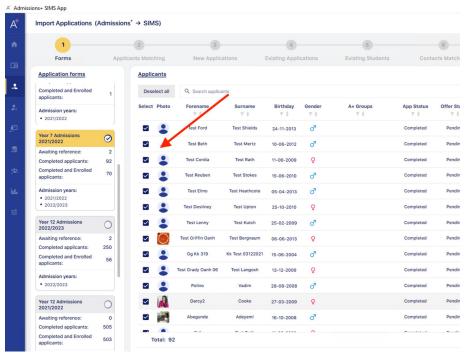


Note: if the form is not visible in your A+ SIMS App, log into your A+ system and ensure the toggle switch is active in your forms area



Select your applicants

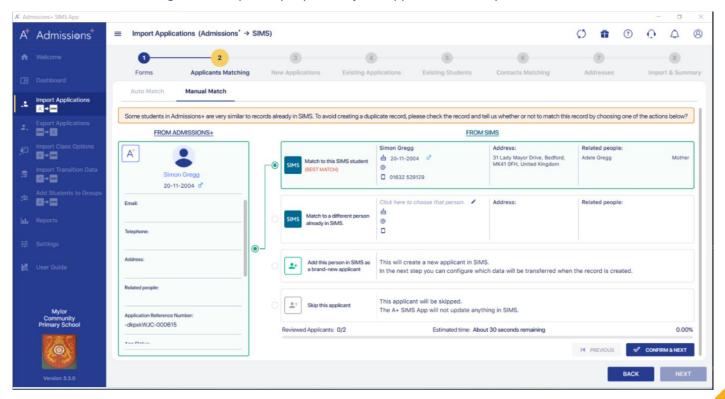
Step 1 (Applicants) - You can then select which applicants you would like to import. Select them using the checkboxes to the left of their names, or use the "select all" button at the top if appropriate. Click "next"



NOTE: the following steps are all designed to ensure no duplicates are created in SIMS when you complete your import.

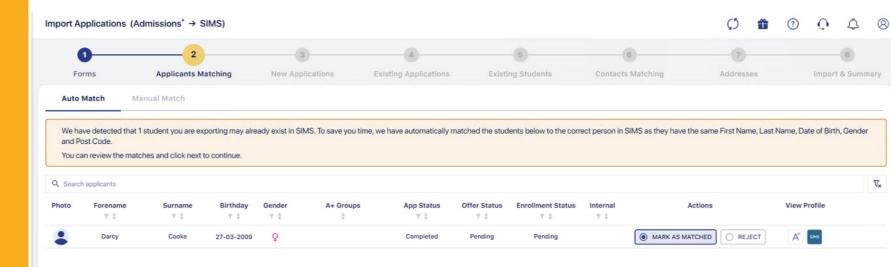
Detecting Duplicates: Manual Matching

The app will also detect any applicants you are trying to import, whose records seem **similar** to a record already held in SIMS, and with these you can **Manually Match** the records to ensure the data is linked, if applicable, or that a brand new applicant is created in the event that the data belongs to two separate people who just happen to have very similar details to one another.



Detecting Duplicates: Auto-matching

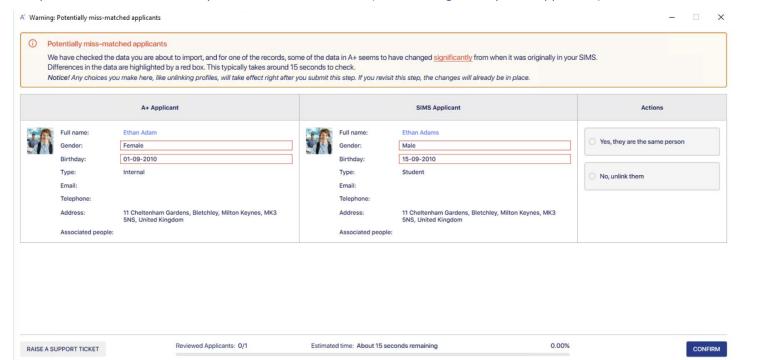
Next, the app will **Auto Match** any applicants you are trying to import, whose data seems to match someone already in SIMS. It doesn't know for sure that they are the same person until you confirm it, but "mark as matched" will be preselected for you as there is a very strong likelihood that the two sets of data belong to the same person.



Detecting Mis-matches

The App will then scan to detect any potentially mis-matched applicants.

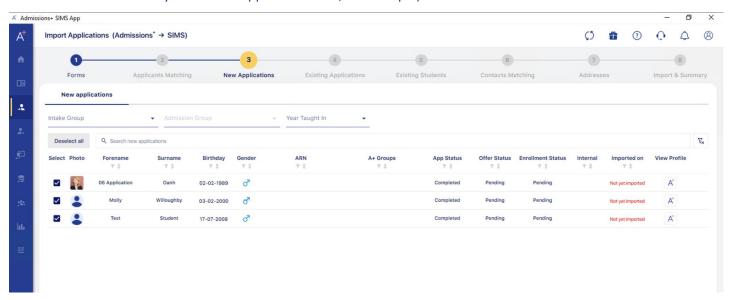
Step 2 - Here, it is looking for any students who **already exist in SIMS** and will flag any students to you whose data seems to have changed significantly on their Admissions+ profile, compared to the existing data held in SIMS. You have the option to decide whether they are indeed the same person, or whether the two profiles should be unlinked (thus creating two separate applicants).



New applications

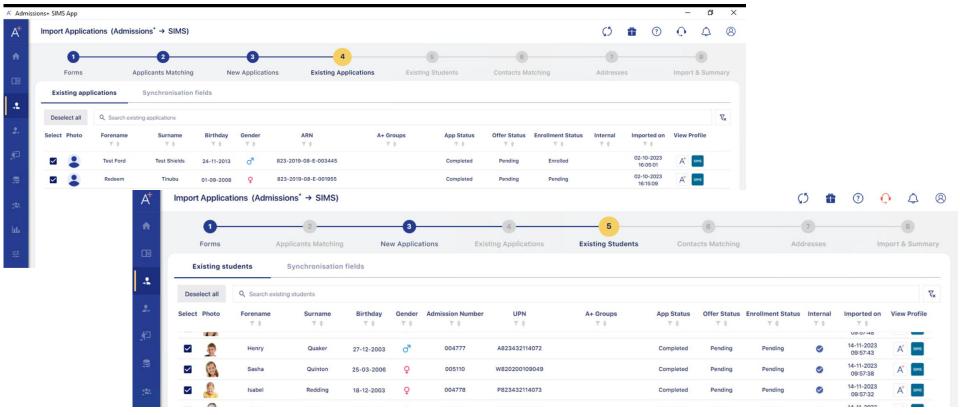
Step 3 - The app will then show you a list of all **New Applications** - applicants who have never been imported into SIMS before, and who do not match to any existing data within SIMS.

You will also see lists of Existing Applications (applicants who have previously been imported via the SIMS App and are not currently on roll - externals) and Existing Students if applicable (this would be the current on roll Year 11 students on your Year 12 application form, for example).



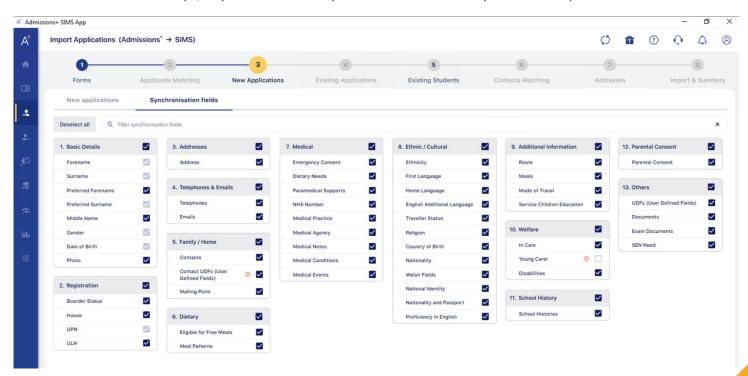
Existing applications and students

You will also see lists of **Existing Applications** (applicants who have previously been imported via the SIMS App and are not currently on roll - externals) and **Existing Students** if applicable (this would be the current on roll Year 11 students on your Year 12 application form, for example).



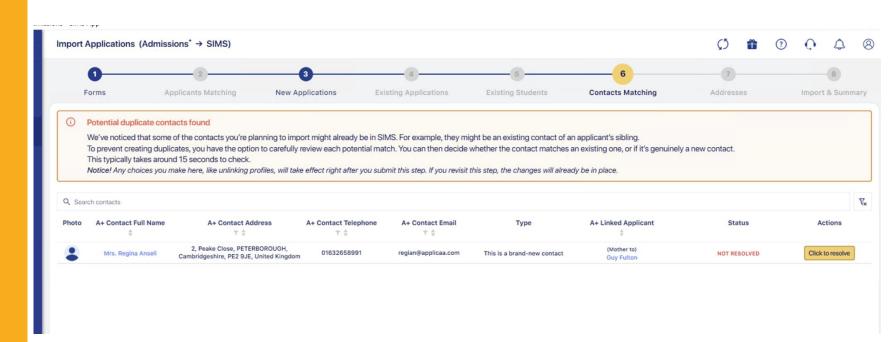
Selecting which data to import

You will select the pre-admissions group that the data should be imported into, and will also have the choice of which data to import for each of these groups. You can "select all" to import all data collected in A+ which writes back via SIMS lookups, or you can individually select the fields of data you wish to import.

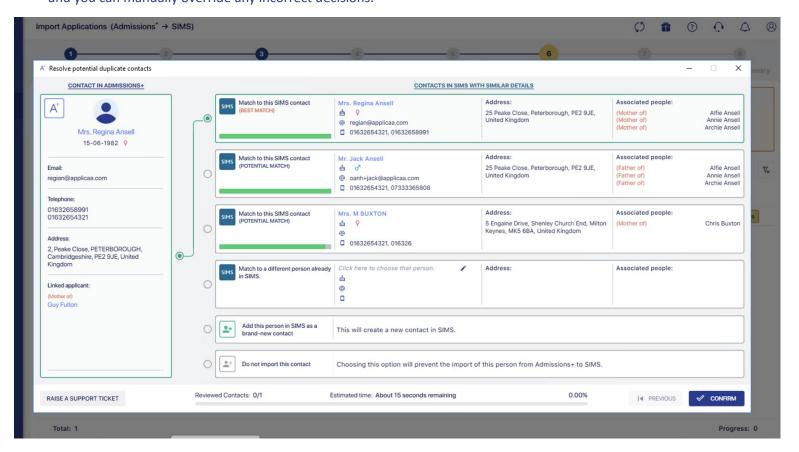


Contacts matching

Step 6 - The **Contacts Matching** step will check to see if any data for the contacts you are importing already exists within SIMS. Again, this is to prevent duplication.

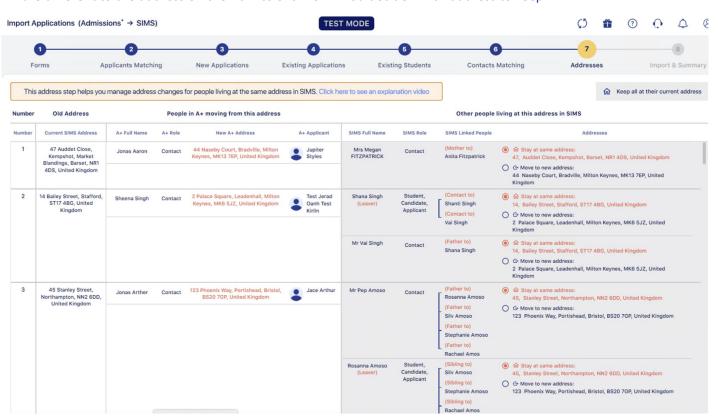


The app scans for any likely matches and shows you the most likely match at the top of the list for each contact. The app pre-selects the answer it thinks is correct it in each case (whether to match to existing or create new) and you can manually override any incorrect decisions.



Addresses

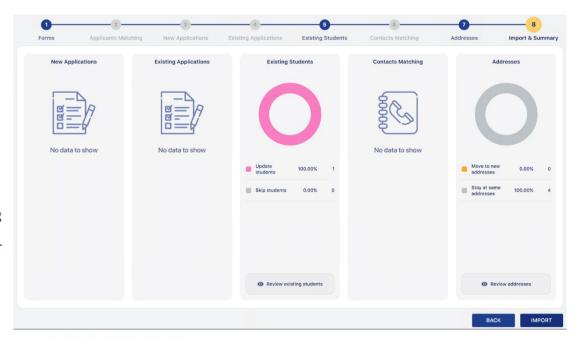
Step 7 - The **Addresses** step checks to detect any addresses being imported for an existing SIMS contact, which are different to the address on the Admissions+ form. You decide which address to keep.



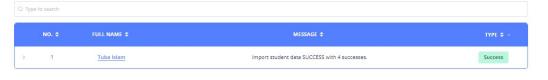
Completing the import

Step 8 - The final page shows you a summary and here, you click to import the data into SIMS.

You will receive a report at the end of the import, summarising the successful imports and highlighting any errors if applicable.



IMPORT APPLICATIONS REPORT

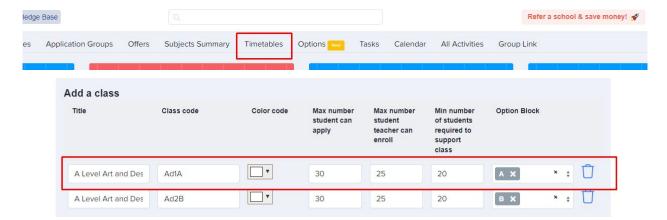


Importing classes into SIMS

Only students whose status is "enrolled" in your A+ system can have their classes imported into your MIS.

Please ensure prior to importing classes:

- 1. That you have checked your **MIS class codes** match the class codes you have added in Admissions+ by visiting your Timetables area from the main dashboard. Your timetabler can confirm the class codes from your MIS if you are uncertain whether or not they are correct.
- 2. That the students' status in SIMS has been updated from "applied" to "accepted" or "admitted"

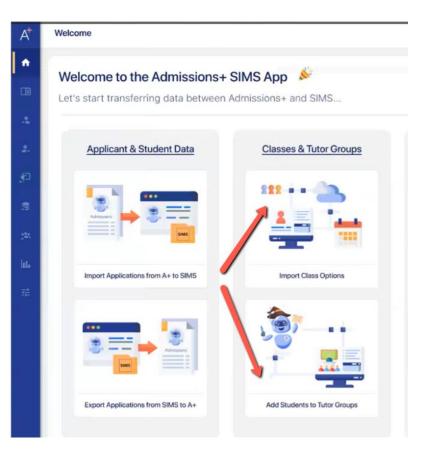


Choose "import class options"

Within the A+ SIMS App, click the "import classes" icon and then choose the correct application form from the list on the left hand side of your screen.

Select the students you wish to transfer the classes information for (those who have been enrolled) and then select the correct academic year for those applicants.

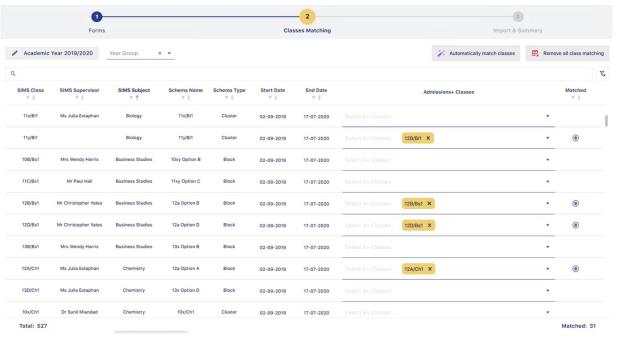
You can also import Tutor Groups from your Sorting Hat Wizard once you have sorted students into form groups. Read more on this on slide 23.



Filter to the relevant classes within SIMS

This will show all available classes in SIMS and you can filter that to show only Year 12 classes.

The SIMS Class Code and class information will show, and you can click "automatically match classes" to match the SIMS classes to the classes created in your Admissions+ system.



Check your classes are correctly mapped

Ensure all of the classes are mapped correctly (once you have done this once, the App will remember your settings for next time).

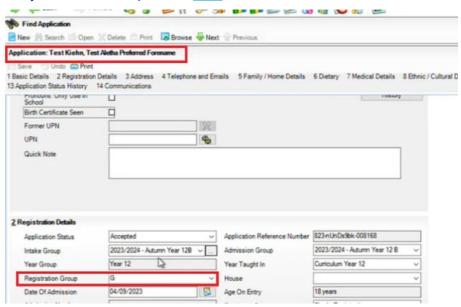
Click "next" and then "import" and the classes will then be imported for the students you have selected.

Please note, this process does not add the students to their base bands in SIMS, so this still needs to be done directly in SIMS.

Importing Form Group Data

You can use the Sorting Hat wizard to assign students to Form Groups - find out more about how that works here

Once students have been allocated, their allocations can be imported and students will be assigned to those groups in SIMS - you can see the process <u>here</u>



FAQs and Useful Links

Should I import my data in batches, or all at once?

Batches work best - perhaps 20 students at a time, until you get more familiar with the process and can then manage larger batches

When is the best time to import my applicants?

- You can import them as soon as they have completed your Admission Form (Y7, Primaries) no need to wait until they are all complete; process in batches as above
- For Year 12, we suggest importing as late as possible after Enrolment; that way you minimise the amount of data being transferred and avoid having to delete lots of applicants from your pre-admissions area who never proceed to enrol with you

When should I import CTFs?

Please import your data from A+ first, and then import your CTFs directly to SIMS - you can read more on this <u>here</u>

Where can I find the link to install the SIMS App?

The link to download the App, alongside the guidebook and articles on importing and exporting data can all be located within the Data & Integrations area of our Knowledge Base





THANK YOU