

isams MIS Admissions+ Guide Book

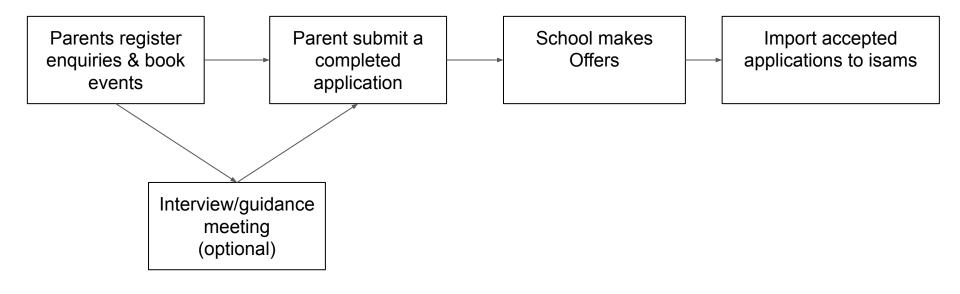


Guide Book - Contents

- 1. Admissions Process
- 2. How to set-up the API
- 3. Which fields are imported
- 4. How to perform the export of application data from Admissions+ to isams
- 5. How to perform the export of UDF's from Admissions+ to isams
- 6. How to perform the Classes export from Admissions+ to isams
- 7. How to perform the import of Year 11 students from isams to Admissions+
- 8. How to perform the import of Courses from isams to Admissions+

Admissions Process

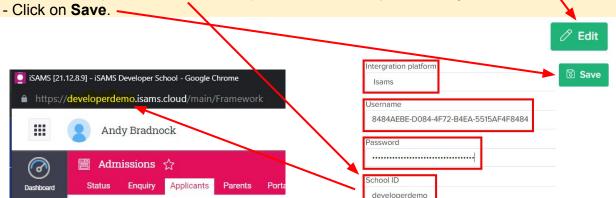




Section 1: isams API Integration with Admissions+

Before you start to export data to your isams MIS from Admissions+ you need to:

- A school admin will need to contact isams Partner Support <u>support@isams.com</u> to request an Applicaa REST API Key. Once your request has been processed they will email you with your API username (Client ID) and API password (Client Secret)
- 2. Add your isams details onto your Admissions+ system:
 - Login to Admissions+ and click **Settings** → **School Settings** → **Integration**.
 - Click on Edit.
 - Select **Isams** as the Integration platform then enter the following:
 - Username is your Client ID.
 - Password is your Client Secret.
 - School ID is your school name in your isams URL https://developerdemo.isams.cloud/







Section 1: isams API Integration with Admissions+

- Select Verify iSams Credentials/Permissions to ensure your MIS credentials are valid.
- 2. Once the validation process is complete you should see this message.

MIS Credentials Validation

Credentials are not verified!

Verify iSams Credentials/Permissions

MIS Credentials Validation

iSams credentials are valid.

Download Lookup Values

Import UDFs

Section 3: Which fields are imported for students - photo, name, birthday, gender and country

Property Name	File Comment	How this processed	isams Import
Photo			Yes
Legal Surname	60 characters max, 1 character min	Existing data replaced with new data from A+	Yes
Legal Forename	60 characters max, 1 character min	Existing data replaced with new data from A+	Yes
Preferred Name	60 characters max, 1 character min	Existing data replaced with new data from A+	Yes
Middle Name	60 characters max, 1 character min	Existing data replaced with new data from A+	Yes
Date of Birth	YYYY-MM-DD	Existing data replaced with new data from A+	Yes
Gender	Either M or F		Yes
Country			Yes



Section 3: Which fields are imported for students - phone, email, ethnicity, nationality, religion and language ability

Property Name	File Comment	How this processed	isams Import
Phone Number	20 characters max		Yes
Email	60 characters max		Yes
Ethnicity	Lookup		Yes
Nationality	Lookup		Yes
Religion	Lookup		Yes
Language Ability	Lookup		Yes
Boarder Status	Lookup		Yes - required

Section 3: Which fields are imported for students - UPN

Property Name	File Comment	How this processed	isams Import
UPN			Yes
Current School			Yes

UDFS and Timetable are also imported

Property Name	File Comment	How this processed	isams Import
User Defined Fields (UDFs)			Yes
Timetable (Allocated Classes)			Yes

Section 3: Which fields are imported for contacts - relationship, initial, name, gender, parental responsibility and occupation

Property Name	File Comment	How this processed	isams Import
Relationship	Relation of parent to child (no lookups)		Yes
Initial	Title		Yes
Legal Surname	60 characters max, 1 character min		Yes
Legal Forename	60 characters max, 1 character min		Yes
Middle Name	60 characters max, 1 character min		Yes
Gender	Either M or F		Yes
Responsibility	'T' for True or 'F' for False Legal parental responsibility		Yes
Occupation	(no lookups)		Yes

Section 3: Which fields are imported for contacts - phone, email and home address

Property Name	File Comment	How this processed	isams Import
Phone Number	20 characters max		Yes
Email	60 characters max		Yes
Address 1			Yes
Address 2			Yes
Address 3			Yes
Town/City			Yes
Postcode			Yes
County			Yes

isams By IRIS

Section 4: isams MIS Admissions+ Export





Step 1: Using the School Manager in isams to create a School Term, Year and Form ready for the export

- Click View All Modules → School Management → School Manager module.
- Creating a School Term:

Click School Terms tab → Create Term

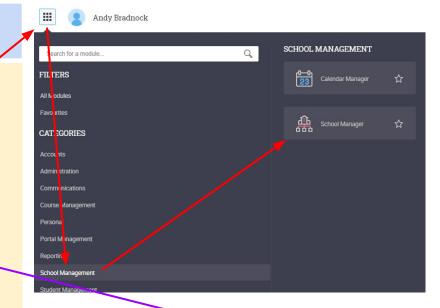
Creating a Year:

Click Years tab → Create Year

Creating a Form:

Click Forms tab → Create Form

Click View All Modules → Student Management → Admissions module then click Configuration tab → Statuses tab to view Admissions Statuses in isams.









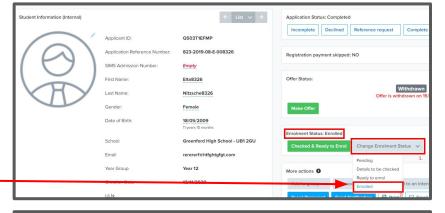
Step 2: Enrolling students to be exported

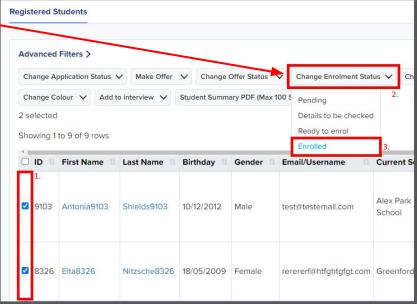
- 1. When your students are ready to be exported to your MIS they should be enrolled in Admissions+.
- For Year 7 students this can be done within the Student Profile or in bulk:

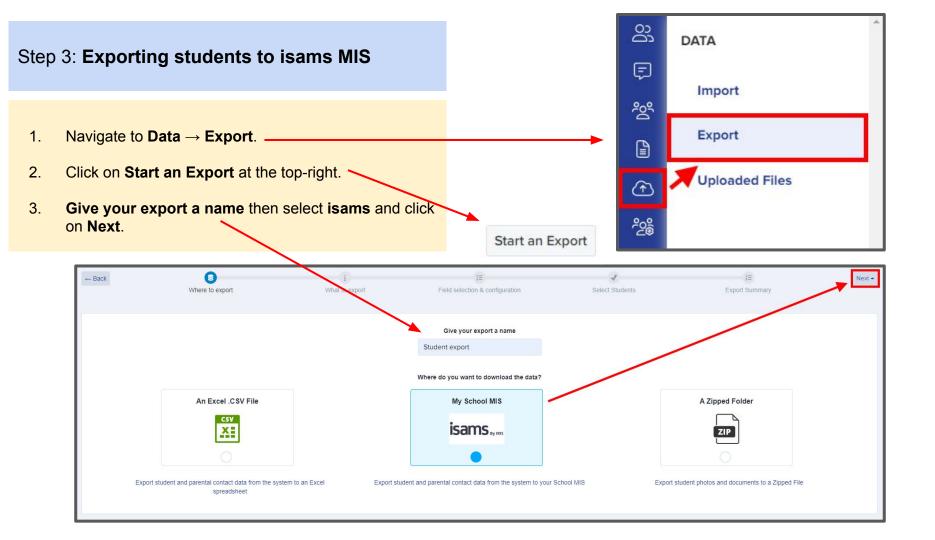
Student Profile method

Bulk Student Selection method

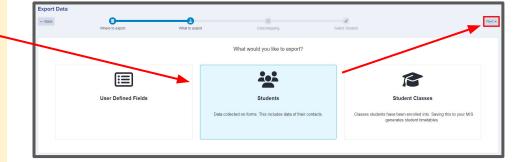
- 3. For Sixth Form students when they are put on their Courses their enrolment status will change to Enrolled.
- 4. The **Student Profile** and **Bulk Student Selection** methods can also be used to enrol Sixth Form students.







- Select Students then click Next.
- On the next Map step you need to: Select Year Group (required) e.g. Year 12 Select School Year (optional) e.g. 2022 Select School Term (optional) e.g. Autumn Select School Form (optional) e.g. AT Select Admissions Status (optional) e.g. Application - Verified and Paid Select Export student as Self Contact (optional)
- 3. The mappings should be correct then click **Next**.

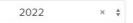




SELECT ISAMS YEAR GROUP, SCHOOL YEAR, TERM, FORM, ADMISSIONS STATUS

Year 12 × ‡

Application - Verified and P... × \$

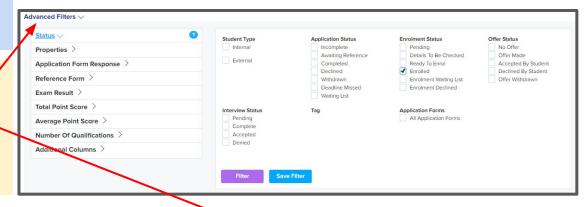


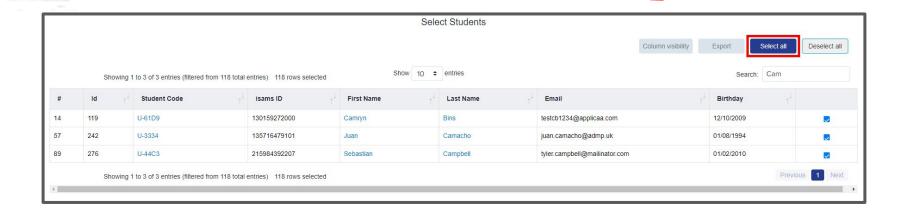


AT × \$

- On the next step you may use the Advanced Filters and then Select all students for your export if required or you can select only students you want to export.
- Click Next.

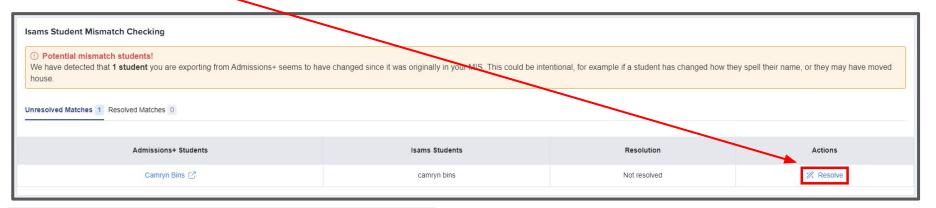
Next →

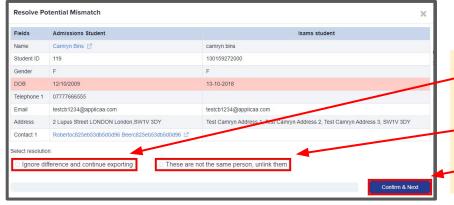




1. On the Isams Student Mismatch Checking step potential mismatched students will be displayed if they are different in your MIS.

Click on Resolve for each student in the Unresolved Matches list.





- 2. Select the **Ignore difference and continue exporting** option to confirm they are a match.
- 3. Select the **These are not the same person, unlink them** to confirm they are **not** a match.
- 4. Click **Confirm & Next** which will show the next student.

Once you have selected an appropriate option for your student(s) they will appear in **Resolved Matches**Click on **Change** to select a different option if required.



2. Click **Go to Student Matching** once all students have been checked.

Please note: If there are too many mismatched students you will need to contact Support or your Customer Success Manager, when this happens the message below will be displayed and you will not be able to continue with the export.

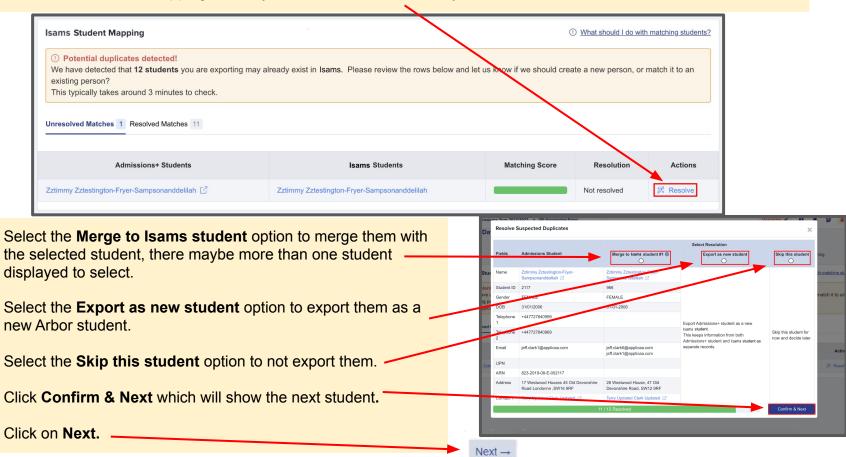
Isams Student Mismatch Checking



2.

3.

1. In the Isams Student Mapping screen you will need to Resolve any Unresolved Matches.





- Once the export process has finished click on the report to check your students exported successfully.
- 2. If there were any issues with the export you will see the reason in the **iSams Notice** column for each student and their contacts.

In the example below the student and contacts exported successfully with no error.

Export Finish!

1 students were processed!

View report »

A+ ID	# ++	iSams Student School id	##	iSams Notice ++	forename ++	surname ++
157	1	164350329644 Student data was transferred to iSams.		Success	Test Clyde	Test Ortiz
				Visit		

#	iSams Student SchoolID	iSams ContactID †+	iSams Notice ++	first_name †+	last_name †↓	email ++	relationship †+
1	164350329644	6054	Success	Kenna36bb4204cfaeecef	Smitham36bb4204cfaeecef	parent36bb4204cfaeecef@applicaa.com	Step Father
1	164350329644	6055	Success	Andy Test	Ortiz	atotest1234@applicaa.com	Father

isams By IRIS

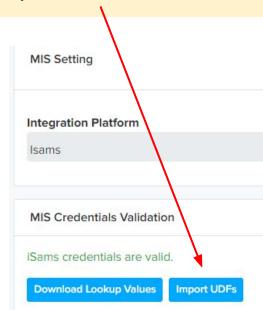
Section 5: isams MIS Admissions+ Export of UDF's



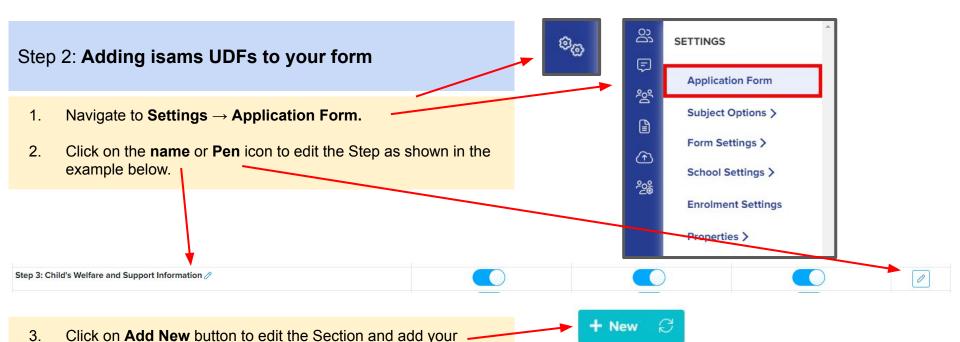


Step 1: Importing UDFs

- 1. Log into Admissions+.
- 2. Navigate to Settings \rightarrow School Settings \rightarrow Integration
- 3. Click **Import UDFs.**







Expand the iSams User Defined Fields property group to select 4.

UDFs.

- **UDFs** to add to your form. If UDFs are grayed out and unselectable this is because they have already been added to your form.
- 5. **UDFs** can also be displayed by typing in the **Search existing** fields box.

iSams User Defined Fields V [Applicant] Admissions Enquiry / ...

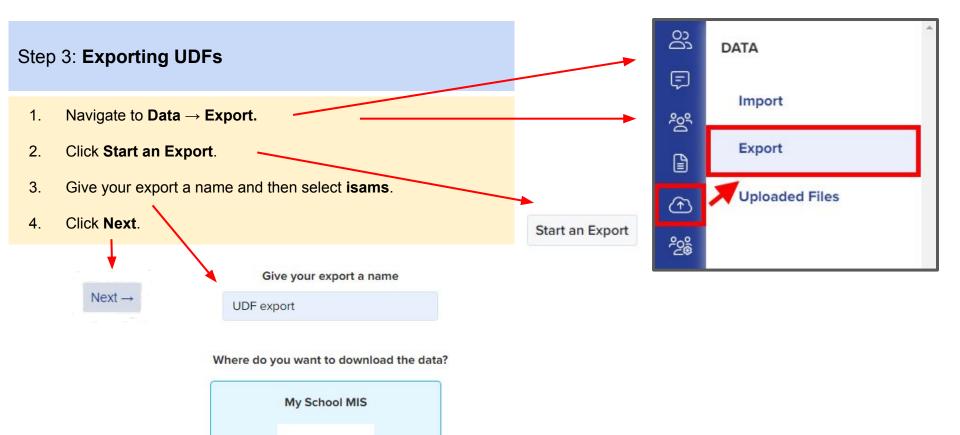
[Statistics] Applicants Census / St...

[Custom Section B] Custom Field B

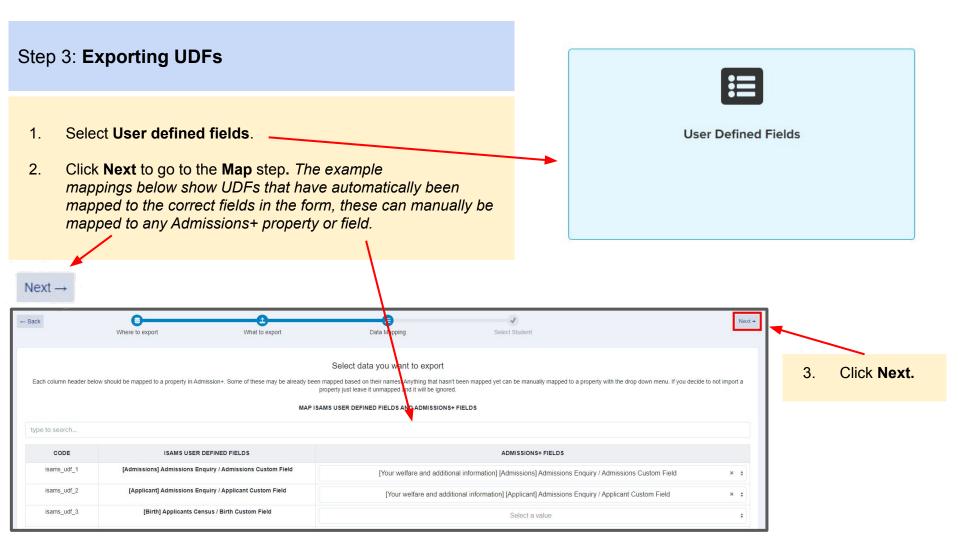
[Interview] Former Assessment / ...

Existing Properties

Add New Field

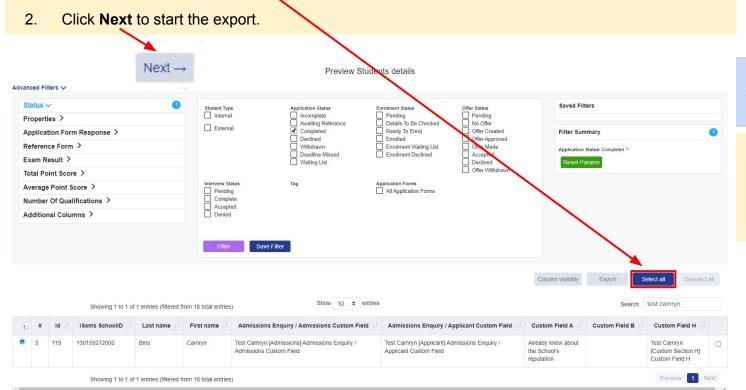


isams By IRIS



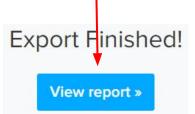
Step 3: Exporting UDFs and Export Report

1. Click on **Select all** or select one or more students as required to export **UDFs** for them.



Step 4: Export Report

 Once the export process has finished click on the report to check UDFs have exported.

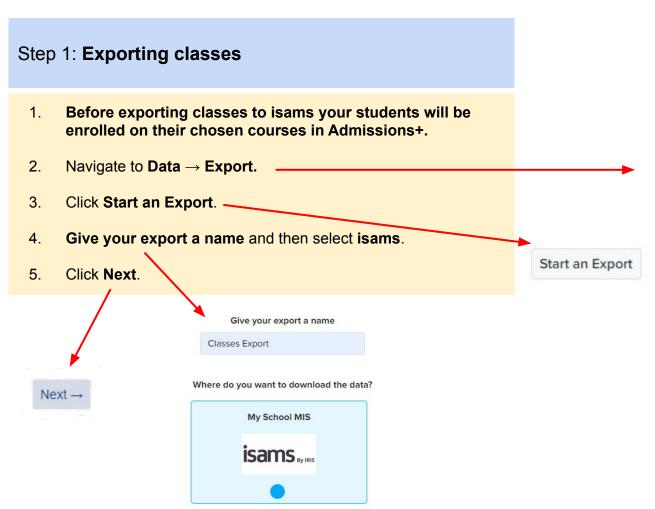


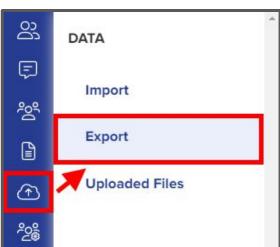
isams By IRIS

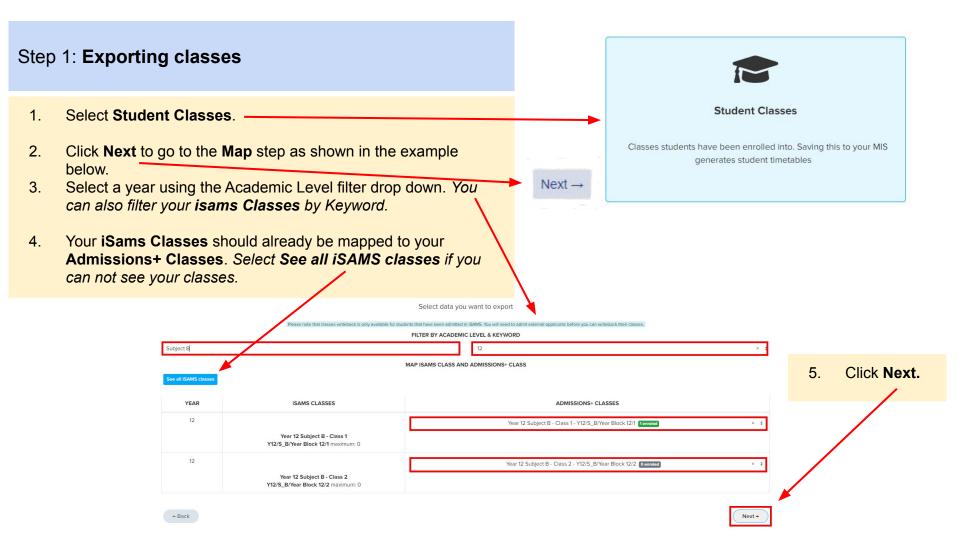
Section 6: isams MIS Admissions+ Export of Classes











Step 1: Exporting classes

1. On the **Details** step a preview of the export will be displayed.

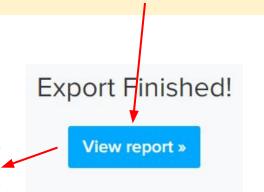
2. Click on Next.

Next +

YEAR	ISAMS CLASSES	ADMISSIONS+ CLASSES
8	Year 8 Subject B - Class 2 Y8/S_B/Year Block 8/2 maximum: 0	Subject B Year 8 Subject B - Class 2 - Y8/S_B/Year Block 8/2 Oemoties
10	Year 10 Subject B · Class 1 Y10/S_B/Year Block 10/1 maximum: 0	Subject B Year 10 Subject B - Class 1 - Y10/S_B/Year Block 10/1 Ownershed
10	Year 10 Subject B - Class 2 Y10/S_B/Year Block 10/2 maximum: 0	Subject B Year 10 Subject B - Class 2 - Y10/S_B/Year Block 10/2 Overcind
12	Year 12 Subject B · Class 1 Y12/S_B/Year Block 12/1 maximum: 0	Subject B Year 12 Subject B - Class 1 - Y12/5_B/Year Block 12/1 Test Clyde Test Ortz -

Step 2: Export Report

 Once the export process has finished click on the report to check Classes have exported.



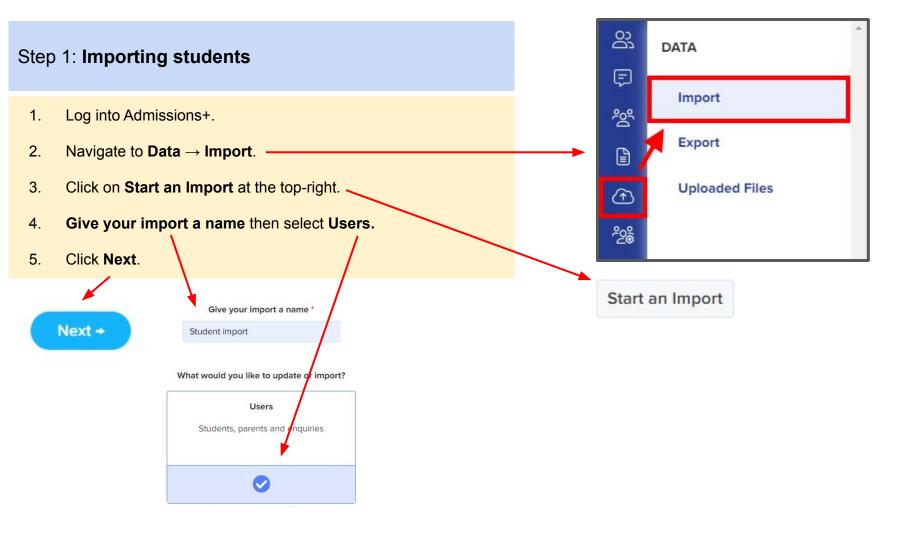
Status	Teaching Set ↑↓	Student ID †+	Student name	iSams Student School ID	†÷
Success	Year 12 Subject B - Class 1 - Year 12	157	Test Clyde Test Ortiz	164350329644	

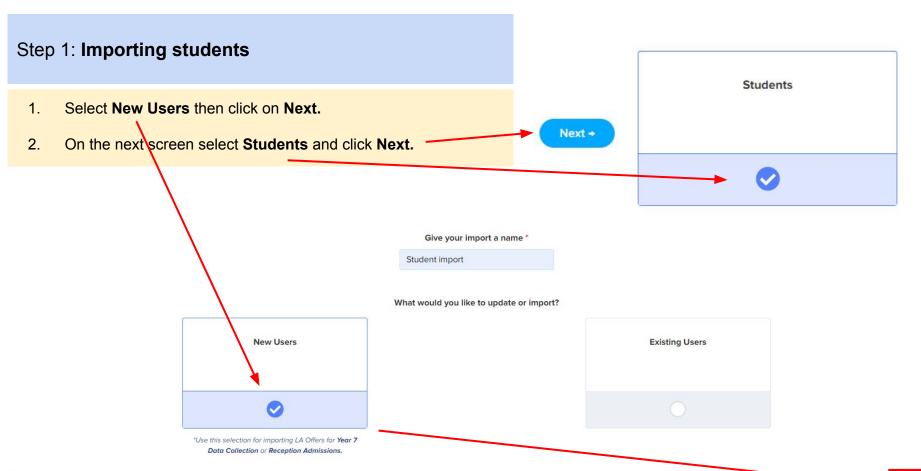


Section 7: isams MIS Admissions+ Import

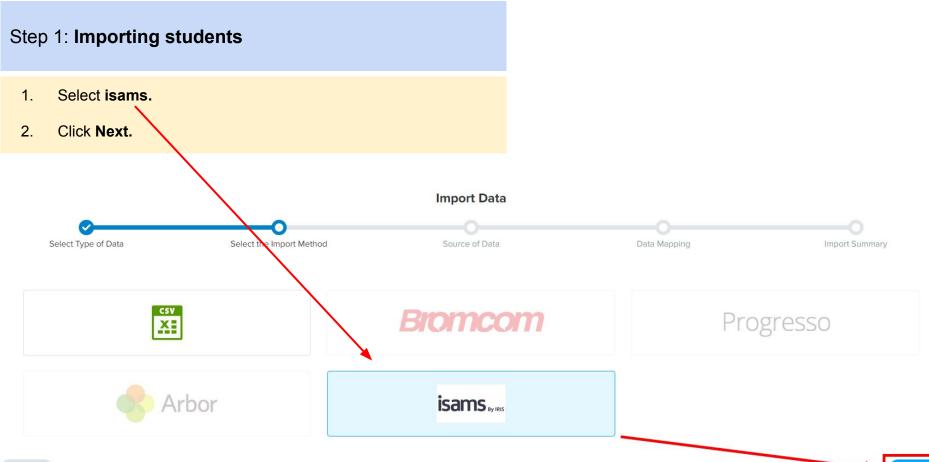




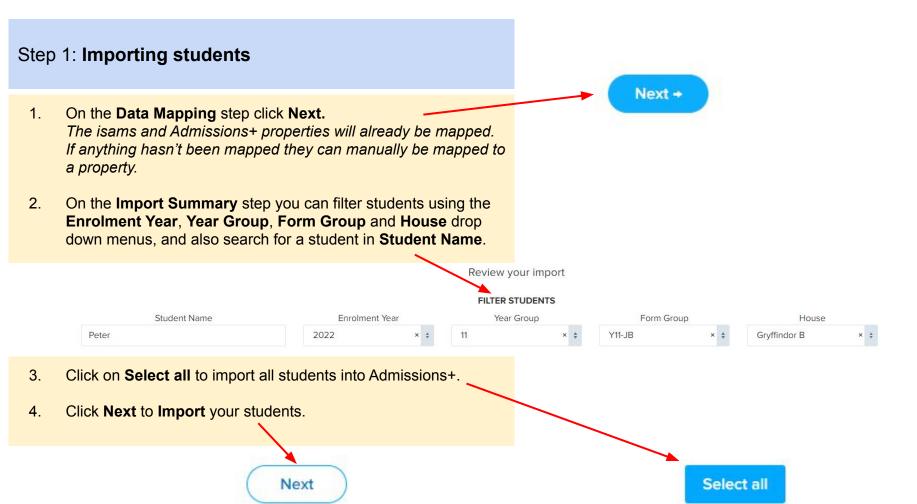


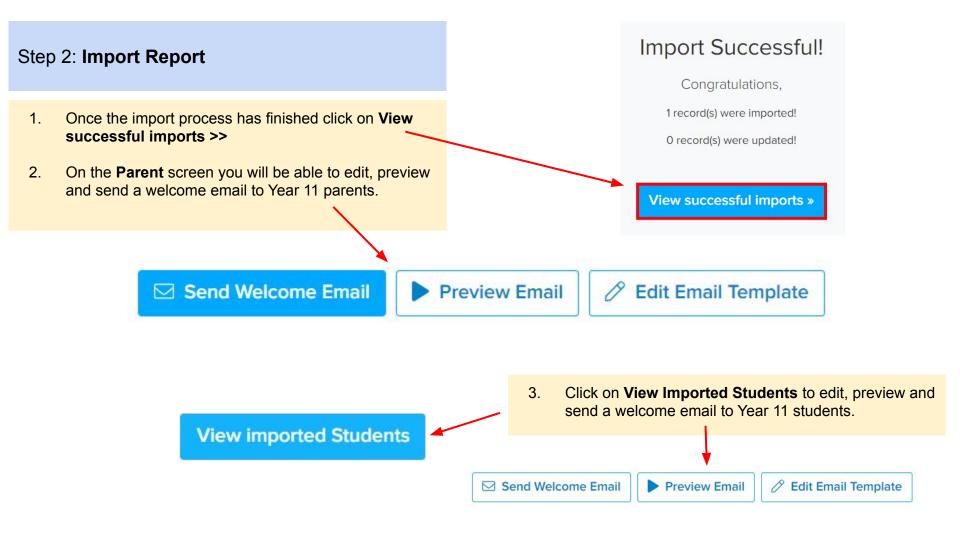






Next →



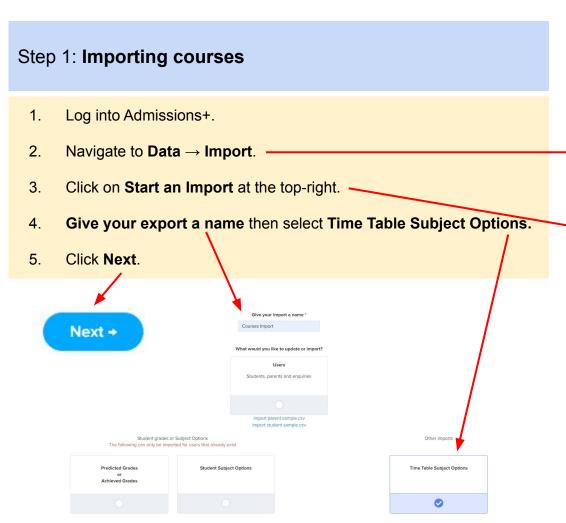


isams By IRIS

Section 8: isams MIS Admissions+ Courses Import

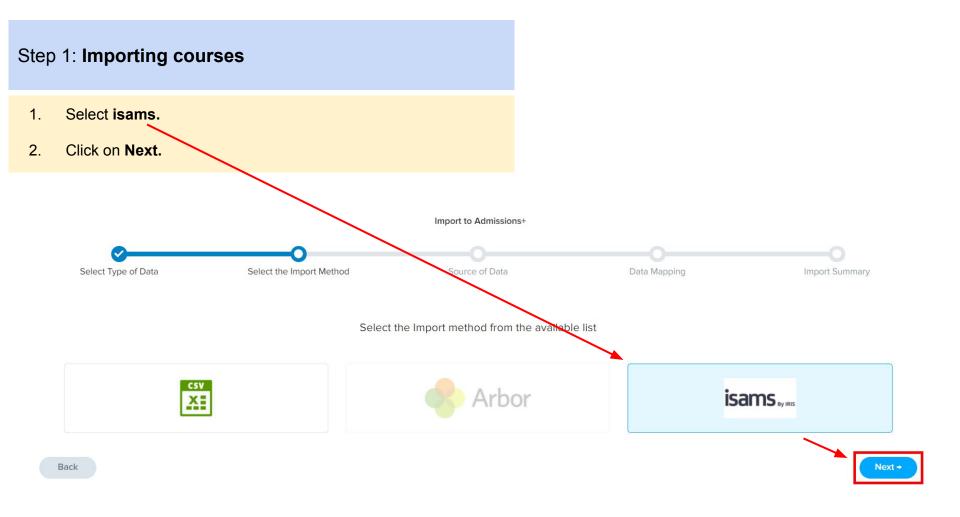


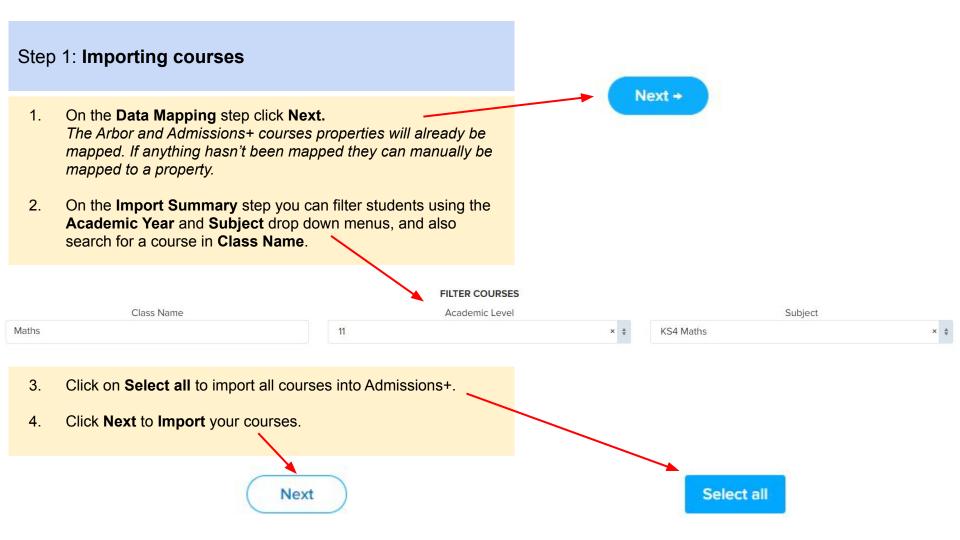






Start an Import





Step 2: Import Report

- Once the import process has finished click on View successful imports >>
- 2. On the next screen click on the **Pen** icon to edit a Course as shown in the example below.

Import Finished!

Congratulations,

1 record(s) were imported!

0 record(s) were updated!

View successful imports »

Qualifi	Qualifications						
ID	Qualification	Course ID	Provider Course ID	Level	Learning Hours	Compulsory	Info last
6	Mathematics				600	No	19/08/2021