Exporting students' Names from *Options* to SIMS .net

Example scenarios

When you have used* *Options* to create a good Pattern of Subjects in blocks, and populated them in such a way as to get good Student Satisfaction, then you will want to get the Names of the students into the correct Teaching Groups in SIMS .net.

There are 2 ways of doing this:

- In *Options* print out the Teaching Groups lists (see page 47 in the *Options* Handbook), then manually assign the students into the correct Teaching Groups in SIMS. This is tedious and can lead to errors.

or, better,

- Use the method described in this article. It is often called the 'SYLK' method because it uses a SYLK file to transfer the data from *Options* to SIMS.
  This populates the option groups, ensures accuracy and will save you a lot of typing time.

The process has 3 steps:

A. An export from SIMS, to produce a template SYLK file, then
B. A brief matching process in *Options* using that SYLK file, and then
C. The file is re-imported to SIMS, now with details of which Students are in each Teaching Group in each Block.

Before Step A, SIMS needs to have either the curricular structure of the new timetable or a completely-scheduled new timetable. There are 2 possible scenarios:

Scenario 1 :	Scenario 2 :
1. Perhaps in April-June? When the Curriculum Diagram has been set up in *TimeTabler* (but not necessarily scheduled), export from *TimeTabler* to SIMS .net. So there is a timetable structure in SIMS.	1. Perhaps in June-July? When the timetable has been completely scheduled, export from *TimeTabler* to SIMS .net in the usual way. So there is a timetable structure in SIMS.
2. Perhaps in May-July? **Step A** (see page 2) Export from SIMS using the 'Export Curriculum Membership Wizard' (which creates a 'SYLK' file). **Step B** (see page 3) Import that file into *Options* ... where this new feature allocates the 'T'-Ticks to the correct cells, and exports an updated SYLK file. **Step C** (see page 4) In SIMS, use the 'Import Curriculum Membership Wizard' to import this SYLK file with all the students' option Choices.	2. Perhaps in June-July? **Step A** (see page 2) Export from SIMS using the 'Export Curriculum Membership Wizard' (which creates a 'SYLK' file). **Step B** (see page 3) Import that file into *Options* ... where this new feature allocates the 'T'-Ticks to the correct cells, and exports an updated SYLK file. **Step C** (see page 4) In SIMS, use the 'Import Curriculum Membership Wizard' to import this SYLK file with all the students' option Choices.
3. Perhaps in July? Import the completed timetable from *TimeTabler* when it has been completely scheduled. Provided the Teaching Group Names have not changed in the meantime, the groups will be matched correctly in SIMS.	

Steps A, B, C are explained in detail on the next 3 pages.

* Note : In order to be able to Export to SIMS as in Steps A, B, C, *Options* has to have the *same* student data as in SIMS, specifically the same Surname, Forename. See page 5.

Step A : Exporting a SYLK file from SIMS

In SIMS, make sure that the timetable structure is in place, either by doing the first part of a double-export (as explained in 'Export-Doc-3-SIMS.pdf', page 6), or by doing a full import of the completed timetable (as described in the same document).

Ensure you have run the Promotion Routine in SIMS (Routines ➡ School ➡ Promotion) so that students are appearing in the Curriculum Assignment screens.

Check you are in the correct Academic Year. ie. go to Tools ➡ Academic Management. Select Academic Year, and select the Academic year you wish to work in. Then follow the steps below:

1. Go to <u>F</u>ocus ➡ <u>S</u>chool ➡ <u>A</u>cademic Structure ➡ <u>C</u>urriculum Assignment by Scheme:
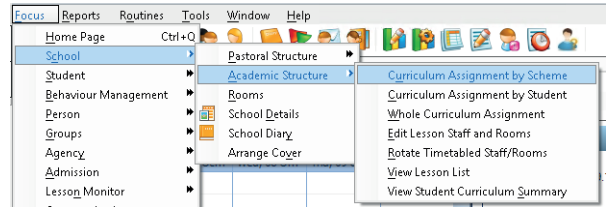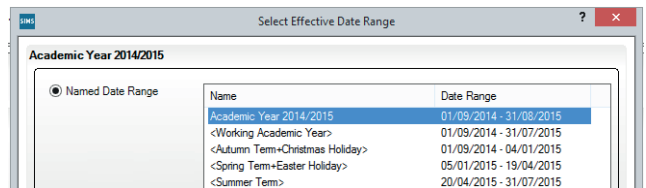
2. In the Scheme Name box, enter the Year and click **Search**.

    Find the first Option Block that you wish to import students to. In the screenshot here, it is 10wk **Option Block B**.
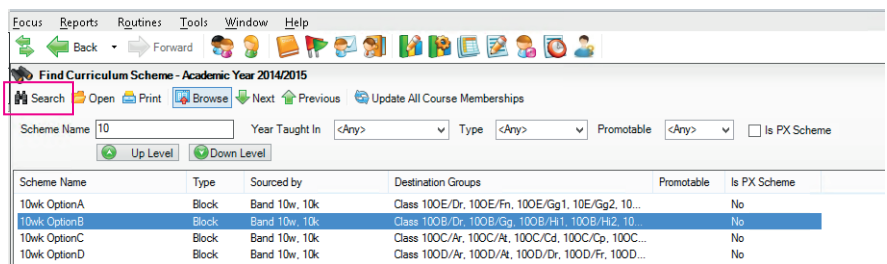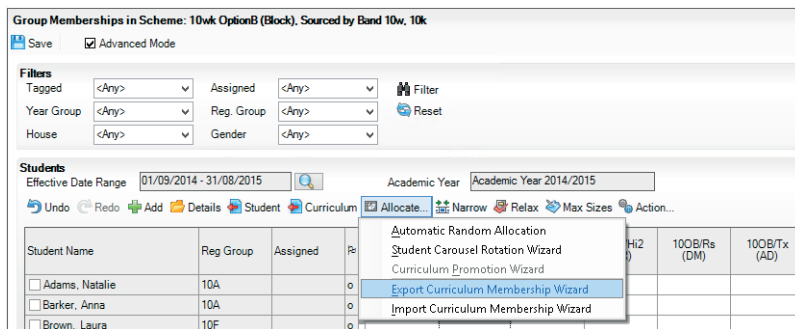
    Double-click on it.

3. Ensure that the Date ranges conform with the <u>new</u> academic year. Click OK.

4. The screen then shows the Students in the named Year (Year 10), along with the Option Groups in that Block of the timetable structure (the Curriculum Diagram).

    Click on the [Allocate...] button and then on <u>E</u>xport Curriculum Membership Wizard:

    If students do not appear in this view then you may need to assign the students to a Base Group or Band. Click Browse and then select Base Groups in Year 10.

5. Follow the steps of the Wizard.
    Ensure the Reference Date is set to the start of the academic year, ensure 'Level of detail' is 'Empty'. In the 'Confirm File Name box, browse to an area where you can easily save/find your SYLK file (eg. a memorystick or a known location on the network). Finish the Wizard.

You now have a SYLK file template, with a name in a format like : 10wk_**OptionB**_20141014_20141014.slk This is the file to use in Step B, in **Options**, see the next page.

At this point you can either move to Steps B and C to complete the data for this first Option Block, or you can repeat steps 2−5 above to get the SYLK files for the other Option Blocks. Click Browse to return to the list of blocks.
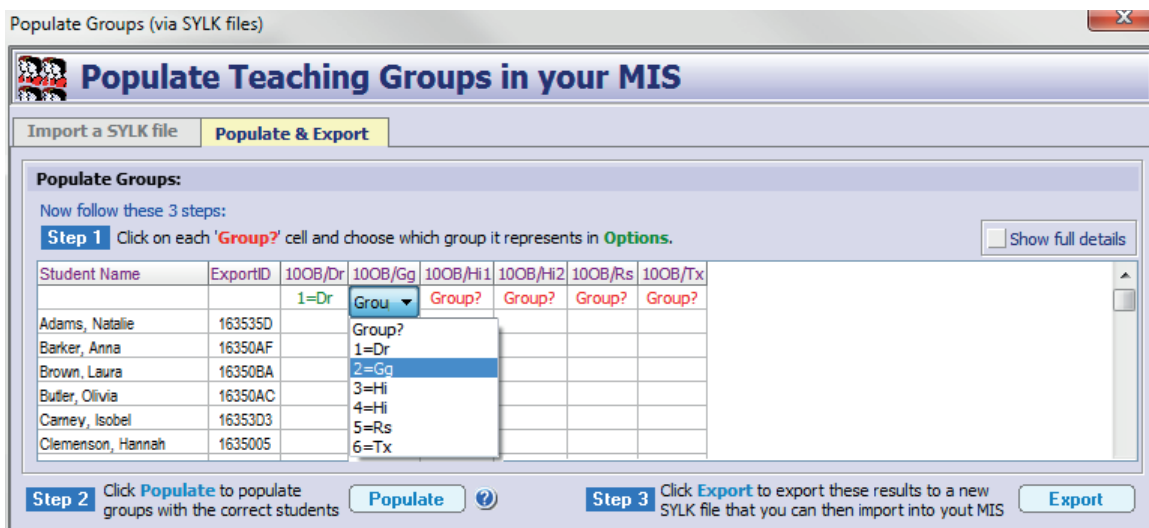
Step B : Matching the SYLK file with the data in *Options*

1. In *Options*, either go to File ➡ Export to ➡ Populate Teaching Groups in your MIS (SIMS) or go to Export ➡ MIS/Admin System ➡ Populate Teaching Groups in your MIS (SIMS), to see this screen:

In part 1, choose the Block you wish to send to SIMS (you work on just one block at a time).
In part 2, browse for the relevant file you created at Step A. Make sure that it refers to the *same* Block you have selected in part 1. ie. both are for Block B in the screenshot above.

2. Click 'Import now' and you are taken to the 'Populate & Export' screen:

1) Click on each '**Group?**' cell in turn, and select which group it represents in *Options*.
In the screenshot above the first column (option group) has already been specfied as Drama (Dr) and the second column (option group) is about to be specified as Geography (Gg).

2) Click on [Populate] and students in *Options* will be matched with the students from your MIS. They will be matched on student name (surname, forename). The allocations are then shown by T-Ticks in the grid. Any students who could not be matched are shown in **red**. Those that are matched are in **green**. Any additional matching problems will pop-up in a report.
[And if you want to, you can also manually click in the grid to add or remove any T-Ticks.]

3) Click [Export] to create the SYLK file that now contains all the students choices & allocations. The file will have the same name as your imported file but with "done_" before the name, for example, **done_**10wk_**OptionB**_20141014_20141014.slk   It is stored in the same folder as your imported file, by default (but you can choose another folder if you wish).

This is the file that you can now import back into SIMs, as explained on the next page.

Step C : Importing the populated SYLK file into SIMS

In SIMS, follow the same steps 1-3 as in Step A on page 2:

1. Go again to <u>F</u>ocus ➠ <u>S</u>chool ➠ <u>A</u>cademic Structure ➠ <u>C</u>urriculum Assignment by Scheme:
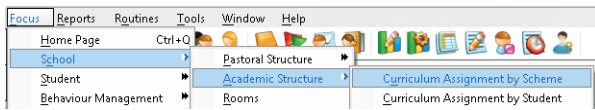

2. In the Scheme Name box, enter the Year and click **Search**.
    Find the first Option Block that you wish to import students to.
    In the screenshot below it is 10wk **Option Block B**. Double-click on it.
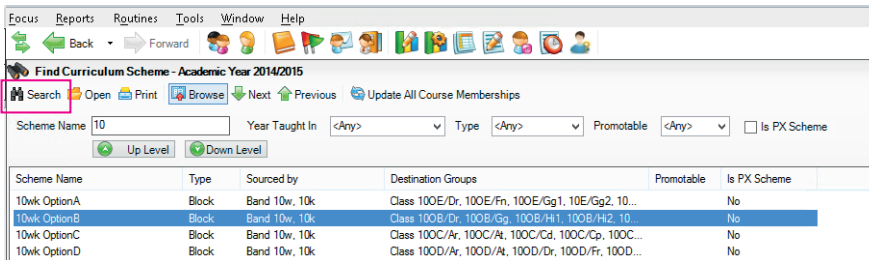

3. Ensure that the Date ranges conform with the <u>new</u> academic year. Click OK.
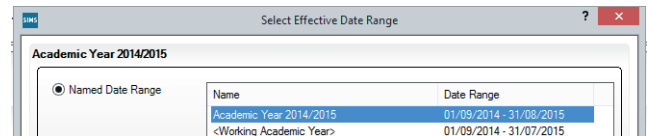
4. The screen then shows the Students in the named Year (Year 10), along with the Option Groups in that Block of the timetable structure (the Curriculum Diagram).
    Click on the [Allocate...] button and this time click on **<u>I</u>mport** Curriculum Membership Wizard:
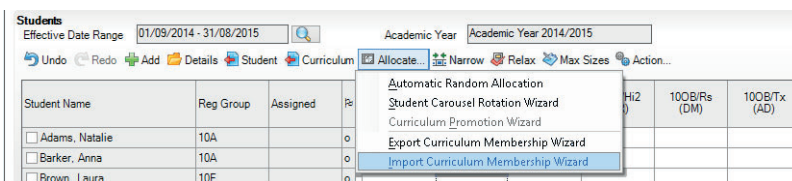
5. Follow the steps of the Wizard.
    When you see the screen shown here, ensure the top 'radio' button is selected, as shown:
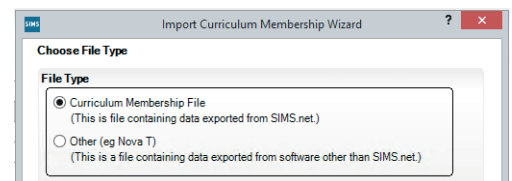
    In the 'Select File Name' section, navigate to your resaved SYLK file (the one that begins with "done_..."). Make sure that you have the correct file for the Block that you are currently going to populate (Block B in this example). Complete the Wizard.

    If, for any reason, not all students have been allocated to a block, you will be asked whether or not you want to complete the import or not.

    The columns containing the Teaching Groups in this Option Block are now ticked/populated from your import (one tick for each student, in each Block). Click on 'Save'.

    At any time you can re-open the Allocation Screen to view/edit the Ticks.

6. Then repeat these steps for each of the other option Blocks.

If you have any queries or feedback or suggestions for improvements, please contact support@timetabler.com

Appendix : Importing the Students into *Options* from SIMS

For the SYLK file to work correctly, the Student data in *Options* must match the Student data in SIMS. Specifically the Surname, Forename *must be identical.*

To ensure this, <u>before</u> you start using *Options* you are strongly advised to export the Student data from SIMS and import it into *Options*, so that the names are *identical*, not just similar. There are 2 main steps.

1. In SIMS, export the data.

The screenshot shows the data (Surname, Forename) that you must include (as 2 separate fields), as shown here:
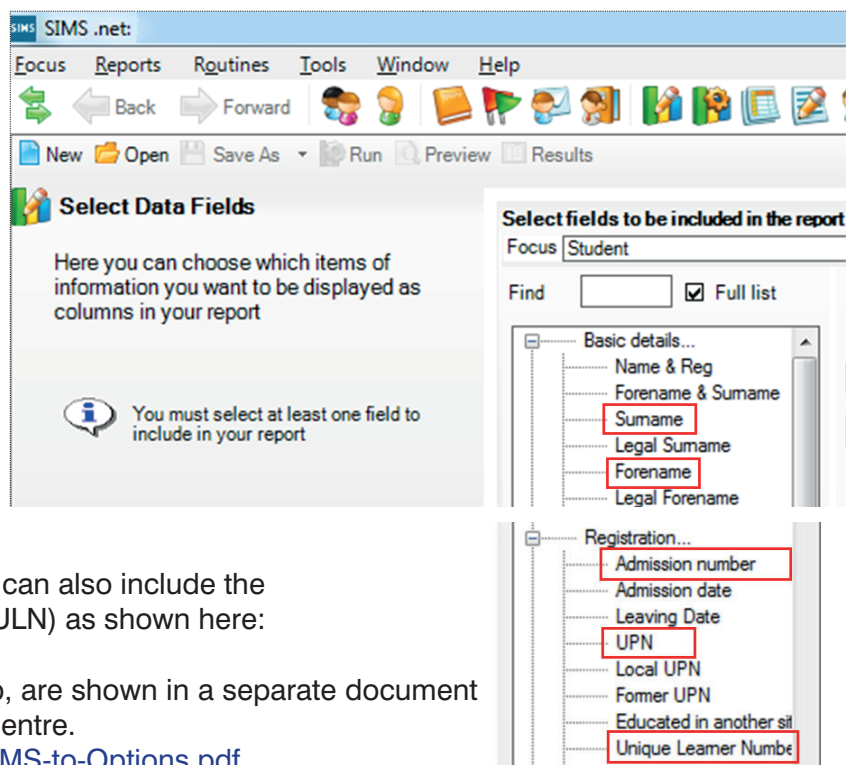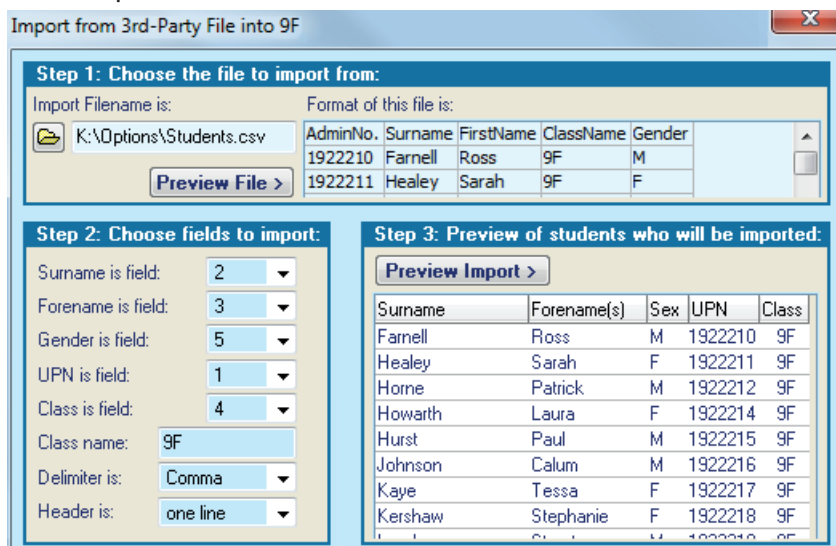
If you wish (but it is not necessary) you can also include the Admission Number (or the UPN or the ULN) as shown here:

Full details of this process, step by step, are shown in a separate document in the KnowledgeBase in the Support Centre.
Its title is : Getting-Student-Data-from-SIMS-to-Options.pdf

2. In *Options*, import the data.

At Students & Choices ➠ Import Students ➠ Import:

There are more details of this screen on page 40 in the *Options* **Handbook**,

or click on the [? **Help**] button.

For full details see the illustrated document in the KnowledgeBase in the Support Centre,
titled : Getting-Student-Data-from-SIMS-to-Options.pdf

Our thanks to Michael Scott and Jim Borcherds for their help in preparing this document.