Exporting from SIMS to Options

When you start using *Options* you need to enter the data for each Student. For example, surname, forename, and Student ID (the UPN). See pages 18, 42 in the orange **Options Handbook** for more details.

You can do this manually (by typing it). However all this data is normally in your MIS Admin system, so exporting a file with this data (from your MIS) will save you a lot of your time.

This document explains how to get the correct file of student data from the **SIMS.net** MIS system.

Contents

Exporting from SIMS	pages 2 – 3
Importing into Options	page 4
Alternative method for exporting from SIMS	page 5

Note:

Later, after you have created a viable **Options** Pattern, perhaps using AutoCreate, then you can transfer all the data back into **SIMS** electronically, using a SYLK file that is produced by **Options**. This ensures that all the Teaching Groups in **SIMS** are populated, quickly and accurately.

For full details of how to do this, with screen-shots, see the document in the KnowledgeBase in the Support Centre. It is titled : Exporting-Options-to-SIMS-viaSYLK.pdf

SIMS	SEARCH

Exporting from SIMS		SIMS .n	et:	
(An alternative method is shown on page 5.)	Focus Re	eports Routines <u>T</u> ools <u>W</u> ind	le L
In SIMS, open Reports , and select Design	Report:		Run Report Design Report Import Export	
The Report Designer opens:	New 📂 Ope	n 💾 Save	▼ 🔛 Run 🗋 Preview 🛄 Results	
Choose ' Create a new report '.	Welcome designer	to the S to the S to e a new rep an existing t a report	IMS.net report	
And then choose ' Student ' as the focus:	New Cope Select Da Choose the report Choose the report Sta Cor Sta	n Pave A ata Area focus on w dent ff ntact ta Collection S	As Run Resu Preview Resu As	lts

And then you have a screen on which you can choose which fields to include in the report (see more details on the next page).

📄 New 📁 Open 🔛 Save As 👻 🎼 Run 💽 Preview	v 🛄 Results
Select Data Fields	Select fields to be included in the report Focus Student
information you want to be displayed as columns in your report	Find
You must select at least one field to include in your report	Forename & Sumame

continued...

There is a long list of items that you can choose from, but the only 5 items that you need (for importing into **Options**) are:

- Surname
- Forename
- Gender
- UPN (Unique Pupil Number)
- Reg group

	Basic details					
	Name & Reg					
	Forename & Sumame					
	Sumame					
	Legal Sumame					
	Forename					
_						
	Gender					
	Photo Available					
	E. Registration					
	Leaving Date					
	UPN					
	Year group					
	Reg group					
	Current / Leaving Year					

Find those five items on the long list and select each of them in turn. Use the green arrow to add each one to the window.

Here's the result:



The next screen allows you to apply a Filter: Mapply Filter

Select '**In Years**' and then select the YearGroup that you want (eg. Year 9).

Here you may apply a filter to restrict the rows in your report Define Filter

The next screen allows you to define a Sort Order.

5

6

Dhaliwal

Eastwood

You can ignore this, as *Options* does not need a specific sort order for the 5 fields. If it asks you for an Effective Date you can ignore this as well.



If the *Options* software is not on the same network you will need to copy this file to a memorystick. You are now ready to Import this file into *Options* (see the next page).

Ayesha

Theo

F

М

9714216110384

8817516210983

9B

9A

Importing into Options

This is described in detail on page 42 of the **Options Handbook**, but some details specific to the **SIMS** import are described below:

- 1. On the **Populations Screen**, enter the Classes in this new Population, eg. 9A, 9B, 9C as shown on the previous page. [See page 16 of the Handbook]
- 2. On the **Students & Choices Screen** [page 18], click on **Import Students** and then click on **Import** in section 2.
- 3. On the **Import Screen**, at **Step 1**, browse for the Excel file produced by SIMS, and ensure that you choose 'xls-style' in the Delimiter field:
- 4. When you click on **Preview my File** you should see the same information (same fields) that you saw in the Excel file at the bottom of the previous page.
- 5. At **Step 2** select the correct field for each box, as shown here:



Then click the Preview the Import button, and check that the data looks correct (ie. same as on page 3):
Step 3: Preview of students who will be imported:

Preview the Im	port >				
This is what the stu	dents will look li	ke in (Options if you ch	oose to impo	ort them in Step 4.
Surname	Forename(s)	Sex	UPN	Class	Notes
Adams	Steven	М	831721623090	9A	
Benson	Laura	F	941531613065	9A	

If all looks OK then you can do Step 4: A Import Students

If you are asked about students in classes not in the current Population, choose 'Ignore'.

7. You can then go to the **Students & Choices Screen** [page 18] to do any editing of this data.

When you have all the students loaded into the program, then you can enter their Subject **Choices**, as explained on pages 20-21 of the orange **Options Handbook**. You can do it:

- either manually, by collecting their Choices on paper and then typing them into **Options**,
- or using the **TOOLS** feature, which collects their Choices electronically, either by the parents / pupils typing them in, or by your Careers Counsellor using **TOOLS** while counselling the pupils.

If you have difficulty hosting **TOOLS** on your school's server then see: http://www.studentoptions.co/ Follow the links, which offer you low-cost or **free** hosting depending on the features you want.

Note : See page 1 for a note about getting the completed data back into SIMS.

SIMS SEARCH

Exporting from SIMS : an alternative method

This is an alternative to the method described on pages 2-3.

Go to General Student List Report, then Filter, then click and drag the required fields into the table, then rearrange by click and drag on the column headers, then export, as shown in the screenshots below:



	Descript	tars	2	×	
Ref Plan Ref Types In Registration Gras In Bands Whe study Who do not study The at pend Born on the Sth. 15 Whose birthday is Males Females Other Reids	Code 10 11 12 13 7 8 9	Description Year 10 Year 11 Year 12 Year 13 Year 7 Year 9			ESCHARIZINE
			ок	Cancel	

Data Area	Select Data Area	sims Run a Screen Based Report		?
ard \checkmark	Standard 🗸	Layout Options		
: Details 🗸 🗸	Registration Details 🗸 🗸	Use a predefined layout	General Student List as of 29/01/2019	
Name	Admission Number	Supply your own layout		
Il Sumame Il Forename	NC Year Enrolment Status	Output raw XML		
lle Names arred Surname	UPN ULN	Output Options		
erred Forename	House	Output type		
der of Pith	Head of House	Open	Excel ~	
	Date of Leaving	⊖ Save to file		
r Group	Boarder Status	1		
Group	Exam Number	-		
gistration Tutor	UCI		01	<u></u>
ick Note	Tier		OK	Cance

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