

Importing from *iSAMS* to *Options*

When you start using ***Options*** you need to enter the data for each Student. For example, surname, forename, and pupil ID. 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 if you can export a file with this data (from your MIS) it will save a lot of your time.

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

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Our thanks to Chris Tetley for his help in preparing this document.

A. In iSAMS, open **Student Manager.**

Under 'School Information', search for the group of pupils that you want to collect the data for:

The screenshot shows the 'Student Manager' application window. The 'Pupil Search' form is active, displaying various search criteria. A pink arrow points to the 'Year Group' dropdown menu in the 'School Information' section, which is currently set to 'Senior 9 - (9)'.

B. Make sure that Page Size (P/S) is set to ALL, so that all the pupils are on a single page.

The screenshot shows the search results table in the 'Student Manager' application. A pink arrow points to the 'Page Size' dropdown menu, which is set to 'P/S - ALL'.

Pupil's Name (Pre Name)	Page Size
BARRY, Olivia	P/S - ALL
CHAPMAN, James	
CRAIG, John	
DOW, Daniel (Danny)	

C. Select All the pupils, by ticking the box next to “Pupil’s Name”:

and then at the right-hand side of the screen, look at the drop-down list labelled ‘Selected pupils’, and select Export Pupils’ Records :

D. You are now in the **iSAMS Export Manager**.

At Step 1, choose the first (default) option.

(On later occasions you may be able to use one of the other options to save time.)

E. In **Step 2** of the Export Manager, open the **'Core Data Fields'** area if it is not already open.

You will see that 'Date of Birth' and 'Preferred Name' are ticked. Untick these.

Then tick 'Gender', so that 3 boxes are ticked:

Field Selection - Step 2 of 4
Select the fields you want to include in the Export - some fields will be selected by default as these form the basics of a students core data.

Core Data Fields (Contains 12 fields which are the Core values) Select All Clear All

Date of Birth <input type="checkbox"/>	Forename (Firstname) <input checked="" type="checkbox"/>	Full Name <input type="checkbox"/>	Gender <input checked="" type="checkbox"/>
Initials <input type="checkbox"/>	Label Salutation <input type="checkbox"/>	Letter Salutation <input type="checkbox"/>	Middle Names <input type="checkbox"/>
Preferred Name <input type="checkbox"/>	Surname <input checked="" type="checkbox"/>	Title <input type="checkbox"/>	Type (Boarding Status) <input type="checkbox"/>

Contacts Fields (Contains 31 fields relevant to Contacts)

Custom Contact Fields (Contains 2 custom fields relevant to Contacts)

Admissions Fields (Contains 48 fields relevant to Applicants)

Current Fields (Contains 69 fields relevant to Current Students) Select All Clear All Select a 'Current' Default

Then expand the **'Current Fields'** area by clicking the small black arrowhead, shown above.

From the list that appears, select (tick) 'Form' and 'Year Group (NC)' as shown here:

Current Fields (Contains 69 fields relevant to Current Students) Select All Clear All Select a 'Current' Default

Academic Category <input type="checkbox"/>	Academic House <input type="checkbox"/>	Account Code <input type="checkbox"/>	Additional Health <input type="checkbox"/>
Additional Time <input type="checkbox"/>	Allergy <input type="checkbox"/>	Allergy Notes <input type="checkbox"/>	Asthmatic Notes <input type="checkbox"/>
Blood Group <input type="checkbox"/>	Boarding House <input type="checkbox"/>	Candidate Code <input type="checkbox"/>	Candidate Forenames <input type="checkbox"/>
Candidate Number <input type="checkbox"/>	Candidate Surname <input type="checkbox"/>	Dental Information <input type="checkbox"/>	Diabetes <input type="checkbox"/>
Diabetes Notes <input type="checkbox"/>	Doctor Name <input type="checkbox"/>	Doctor Number <input type="checkbox"/>	Duplicate Reports <input type="checkbox"/>
Enrolment Date <input type="checkbox"/>	Epilepsy <input type="checkbox"/>	Epilepsy Notes <input type="checkbox"/>	Form <input checked="" type="checkbox"/>
Form Tutor <input type="checkbox"/>	Future Academic House <input type="checkbox"/>	Future Form <input type="checkbox"/>	Future House <input type="checkbox"/>
Future School Name <input type="checkbox"/>	Future School Type <input type="checkbox"/>	Glasses? <input type="checkbox"/>	Insurance Company <input type="checkbox"/>
Insurance Expiry Date <input type="checkbox"/>	Insurance Number <input type="checkbox"/>	Leaving Date <input type="checkbox"/>	Leaving Form <input type="checkbox"/>
Leaving Reason <input type="checkbox"/>	Leaving School Year <input type="checkbox"/>	Leaving Term <input type="checkbox"/>	Leaving Year Group <input type="checkbox"/>
Left or Right <input type="checkbox"/>	NHS Number <input type="checkbox"/>	Other Medical <input type="checkbox"/>	Other Medical Information <input type="checkbox"/>
Passport Number <input type="checkbox"/>	Passport Type <input type="checkbox"/>	Peg Number <input type="checkbox"/>	Personal Tutor <input type="checkbox"/>
Previous School Name <input type="checkbox"/>	SEN Flag <input type="checkbox"/>	SEN Notes <input type="checkbox"/>	SEN Register <input type="checkbox"/>
School Code <input type="checkbox"/>	School Pupil Type <input type="checkbox"/>	Special Requirements <input type="checkbox"/>	Student Contact Notes <input type="checkbox"/>
Student Email Address <input type="checkbox"/>	Student Home Email Address <input type="checkbox"/>	Student Pager Number <input type="checkbox"/>	StudentMobileNumber <input type="checkbox"/>
Surgery Address <input type="checkbox"/>	Surgery Name <input type="checkbox"/>	Tetanus <input type="checkbox"/>	Vaccine Information <input type="checkbox"/>
Withdrawn Date <input type="checkbox"/>	Year Group (NC) <input checked="" type="checkbox"/>	Year Group Code <input type="checkbox"/>	intasthmatic <input type="checkbox"/>
txt dental <input type="checkbox"/>			

Census Fields (Contains 22 fields relevant to Census or Statistical Analysis)

Now contract the 'Current Fields' area.

Expand the 'Other Fields' area in the same way:

Field Selection - Step 2 of 4
Select the fields you want to include in the Export - some fields will be selected by default as these form the basics of a students core data.

Core Data Fields (Contains 12 fields which are the Core values) Select All Clear All

Date of Birth	<input type="checkbox"/>	Forename (Firstname)	<input checked="" type="checkbox"/>	Full Name	<input type="checkbox"/>	Gender	<input type="checkbox"/>
Initials	<input type="checkbox"/>	Label Salutation	<input type="checkbox"/>	Letter Salutation	<input type="checkbox"/>	Middle Names	<input type="checkbox"/>
Preferred Name	<input type="checkbox"/>	Surname	<input checked="" type="checkbox"/>	Title	<input type="checkbox"/>	Type (Boarding Status)	<input type="checkbox"/>

Contacts Fields (Contains 31 fields relevant to Contacts)

Custom Contact Fields (Contains 2 custom fields relevant to Contacts)

Admissions Fields (Contains 48 fields relevant to Applicants)

Current Fields (Contains 69 fields relevant to Current Students)

Census Fields (Contains 22 fields relevant to Census or Statistical Analysis)

Custom Fields (Contains 23 custom fields)

Bus Routes Fields (Contains 3 field(s))

LookedAfter Fields (Contains 3 field(s))

Special Educational Needs Fields (Contains 2 field(s))

Other Fields (Contains 10 fields relevant to Other types of data) Select All Clear All Select an 'Other' Default

School ID	<input checked="" type="checkbox"/>	Sibling ID List	<input type="checkbox"/>	Siblings Name List	<input type="checkbox"/>	Siblings Year List	<input type="checkbox"/>
Submit Username	<input type="checkbox"/>	System Status	<input type="checkbox"/>	intfamily	<input type="checkbox"/>	txtsubmitby	<input type="checkbox"/>
txtsubmitdatetime	<input type="checkbox"/>	txtusercode	<input type="checkbox"/>				

< Back Next > Cancel

Ensure that 'School ID' is already ticked. Keep it ticked.

So you have now selected the following fields:

- Forename
- Surname
- Gender
- Year Group (NC)
- Form
- School ID

Then click on **Next** to move to Step 3.

F. In Step 3 of the Export Manager:

Cancel & Close | Back to Start

Export Options - Step 3 of 4

Would you like to use a saved, shared or new export? Use the tools below to manage your exports.

Order Results By:

Order By: Surname Then: Forename Then: -

You can customise the sort order so the export is displayed in the correct format. By default it goes: **SURNAME** then **FORENAME**.

Export Format:

- ☒ **Export to Microsoft Excel (.xls)**
This option is chosen by default - this will put the results into an Excel Spreadsheet which can be opened and viewed using Microsoft Excel.
- ☐ **Export to Comma Separated Values (.csv)**
This option allows you to put the results into CSV format which is very useful for importing into other software programs or databases.
- ☐ **Export to Tabbed Text File (.txt)**
This puts the results into a plain text file which is separated by Tabs.

Save Export:

☐ Check to Save this Export - its fields and options for future use.

< Back | **Create Export >** | Cancel

You selected 53 Students

Keep to the first (default) option (for an Excel file) and just click on **Create Export >**.

G. In Step 4 of the Export Manager,
click on **Download the Export File**
to view the result as a page in Excel:

iSAMS always exports the Year Number and the Form as separate fields (as shown), but for importing into **Options** you will probably want a single field of YearGroup+Form combined.

To get this, use the 'concatenation' feature in Excel. Enter a function of **=D2&E2** into cell G2, and then copy that formula down the G column in the usual way (by double-clicking on the bottom-right corner of the G2 cell).

The file then shows:

Save this Excel (.xls) file. It is now ready for importing into **Options**.



	A	B	C	D	E	F	G
1	Surname	Forename	Gender	Year Group	Form	School ID	
2	Barnes	Olivia	F	9	A	4244123970	
3	Chapman	James	M	9	B	3203040055	
4	Craig	John	M	9	A	3156484018	
5	Dow	Sophia	F	9	C	14062170554	
6	Evenden	Nicolas	M	9	B	90017705547	

	A	B	C	D	E	F	G
1	Surname	Forename	Gender	Year Group	Form	School ID	Class
2	Barnes	Olivia	F	9	A	4244123970	9A
3	Chapman	James	M	9	B	3203040055	9B
4	Craig	John	M	9	A	3156484018	9A
5	Dow	Sophia	F	9	C	14062170554	9C
6	Evenden	Nicolas	M	9	B	90017705547	9B

Appendix : Importing into *Options*

This is described in detail on page 42 of the **Options Handbook**, but some details specific to the iSAMS 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]

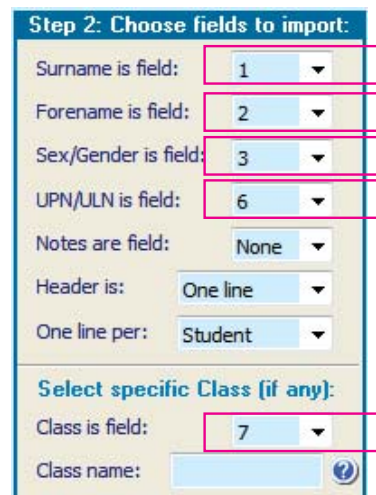
2. On the Students & Choices Screen [page 18], click on  and then click on  in section 2.

3. On the **Import Screen**, at **Step 1**, browse for the Excel file produced by iSAMS, and ensure that you choose 'xls-style' in the Delimiter field:

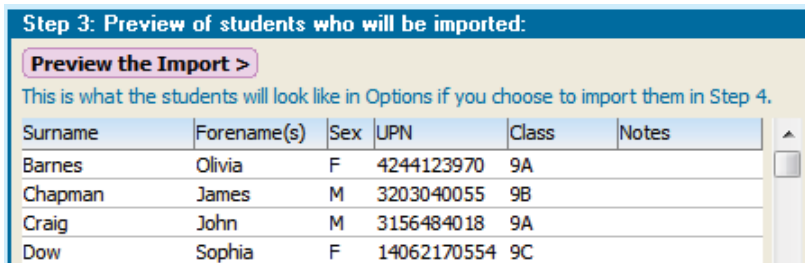


4. When you click on **Preview my File** you should see the same information (same fields) that you saw in the Excel file at the bottom of the previous page.

5. At **Step 2** select the correct field for each box, as shown here:



6. Then click the **Preview the Import** button, and check that the data looks correct:



Preview the Import >					
This is what the students will look like in Options if you choose to import them in Step 4.					
Surname	Forename(s)	Sex	UPN	Class	Notes
Barnes	Olivia	F	4244123970	9A	
Chapman	James	M	3203040055	9B	
Craig	John	M	3156484018	9A	
Dow	Sophia	F	14062170554	9C	

If all looks OK then you can do **Step 4:** 

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.