Exporting students' data from *Options* to iSAMS

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 iSAMS.
(*Teaching Groups are called 'teaching sets' in iSAMS, whether or not they are 'setted'.)

There are 2 ways of doing this:
- In **Options** print out the Teaching Groups lists (see page 49 in the **Options** Handbook) and then type the names into the correct Teaching Groups in iSAMS. This is tedious.

or, much better,

- Use the method described in this article. It transfers the data electronically from **Options** to iSAMS. This populates the option groups, ensures accuracy and will save you a lot of typing time.

The process has 4 stages:

A.   Every student must have their Student ID (or UPN/ULN) included with their name in **Options**.
      This is so that iSAMS can recognise each student unambiguously.
      You may already have this in your data, but if not, page 2 explains how to include it.

B.   The Teaching Groups in your final **Options** Pattern have to be given the same TeachingGroupName as already exists in iSAMS. This is so that iSAMS can recognise what to do with the data.
      This is explained on pages 3–4. At present this stage is still manual (typing).

C.   A file is exported from **Options** (page 5).

D.   That file is imported into iSAMS, taking with it the details of which Students are in each Teaching Group in each Block (page 5).

Stages A, B, C, D are explained in detail on the next 4 pages.

Stage A : Preparing for Export : including a Student ID

We assume that you have now created and agreed the final Pattern of Teaching Groups in **Options**, as described in the orange **Options** Handbook.
So you are now ready to export all that information into the iSAMS MIS.

In order that iSAMS can recognise each Student in your pattern, and know where to place him/her in iSAMS, each Student in **Options** must be given the correct unique Student ID, as in iSAMS.
The Student ID is called **School ID** in iSAMS.
It may also be called UPN (unique pupil number) or ULN (unique learner number).

During the import (at stage D) iSAMS relies on each student's 'School ID' being entered in the 'UPN/ULN' field on the 'Students & Choices' screen in **Options**. If you don't already have UPNs switched on, you will need to first tick the option at 'Customize ➠ Record Student UPNs / ULNs'.

In iSAMS, this number is the School ID, which can be found in the main pupil record in Pupil Manager.
It is in blue, in brackets just above the general pupil details on the first page of the pupil record.

Note :
If you follow the steps described in the PDF called 'iSAMS : Exporting Names to put into Options'**
then you will already have imported the School ID for each student, and you can go straight to Stage B.
** This PDF can be found in the KnowledgeBase in the Support Centre, by just typing '**isams**' into the Search Box.

Question : *"I haven't used UPNs in **Options** so far – what do I do ?"*

If you have completed your work in **Options** without using School IDs (UPNs), then you <u>don't</u> need to start over again. You can simply update your students in **Options** with their UPNs from iSAMS by following these 2 steps :

i)   Create a file in iSAMS that contains your students' forenames & surnames and their School IDs. You can do this by following the steps described in the document referred to above at **

ii) In **Options**, go to : Students and Choices ➠ Other checks ➠ Re-import UPNs from a file. This will add the iSAMS School IDs into the UPN field of each of your students, so you can now export back to iSAMS, as described on the following pages.

Stage B : Preparing for Export : Teaching Group Names

In order that iSAMS can recognise each TeachingGroup in your pattern, and know where to place it in iSAMS, each Teaching Group in *Options* must be given the correct TeachingGroupName.

There are 2 steps to do this:
1. Get a printout from iSAMS of what the TeachingGroupNames are for this YearGroup.
2. Enter those TeachingGroupNames into *Options*.
These 2 steps are covered in turn.

1. Getting a printout from iSAMS of the names of the iSAMS TeachingGroupNames

Method 1 :

In iSAMS, in **Teaching Manager**, on the **Reports** tab, select the first option **Pupil Set Code Spreadsheet** and click **Sets Report** :
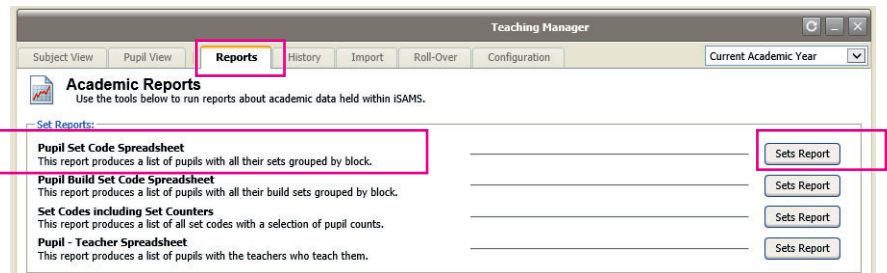
Now select the Year Group [or other group] you want the data for.
You may want to change the sort order using the Order Options dropdowns.
Note that some of the Output Options boxes have been unchecked.
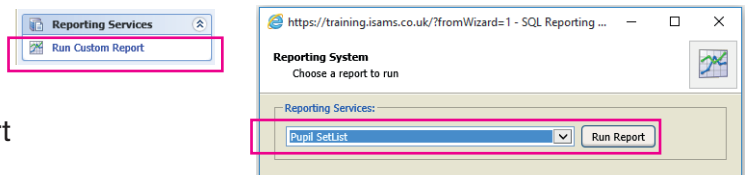Then click **Create Report** in the top left-hand corner.
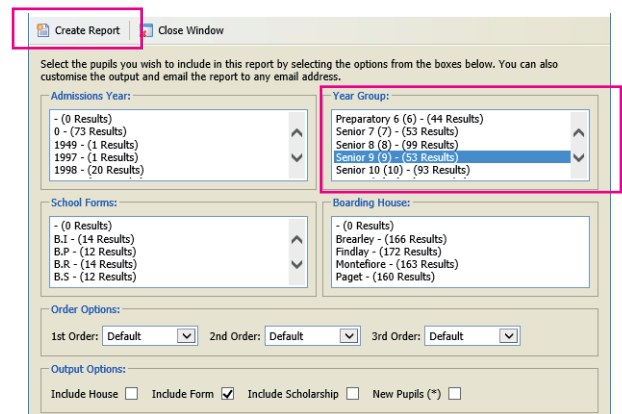
Then download and open the Report.

Method 2 :

As an alternative there is a **custom SSRS report** that can be run from the Wizard Bar :

This produces the information with the correct headings, but schools have to ask for this report to be made available as it's not a standard one.

A copy of this data has been saved as **SSRS Pupil SetList** :

Stage B (continued)

2. Entering the Teaching Group Names into *Options*

In *Options*, you need to give each of the groups on your pattern a Teaching Group Name (**TGN**).

To do this, go to the **Current Pattern Screen**:

Click on the **TGNs** button [TGNs ▼]
and then tick **Display Teaching Group Names**.

You will see a blue **[?]** appear by any group that does not yet have a TGN.

Click on the **[?]** and enter the TGN for that group (eg. 10A/GgA3):

To find and enter the correct TGN for each group,
- highlight one of the groups (in yellow), click on **[?]**,
- to help you identify the group, the screen shows 6 students in it:
- from the iSAMS printout (previous page) look up a student and find the correct name of the TGN for this subject group,
- enter the TGN, in the box shown here:

Note : This needs to be *exactly* the same as the teaching-set name used in iSAMS.   If they are not the same, then iSAMS will not import this group's students.

The screen shows what you have entered:

Continue until each of the groups has got a TGN entered.

Stage C : Exporting a file from *Options*
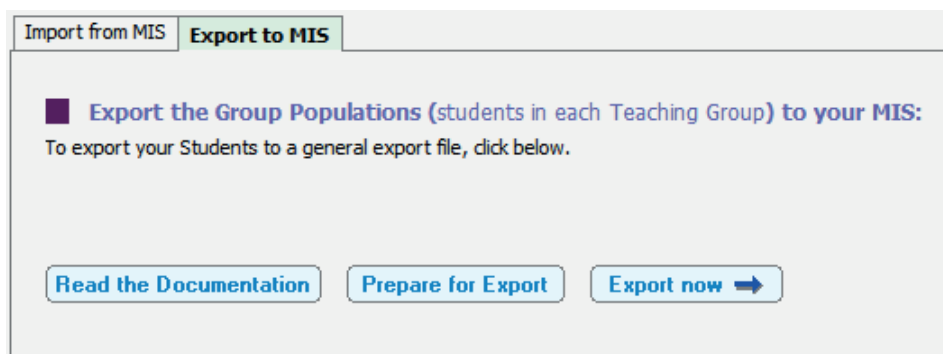
In *Options,* go to Export
➠ MIS / Admin System
➠ Populate Teaching Groups ➠ select iSAMS
to see:

Then click on **Export now ➡**:

Choose where you want to
save the file, and click OK.

If *Options* is on a different
network from iSAMS then
save the file to a memorystick.

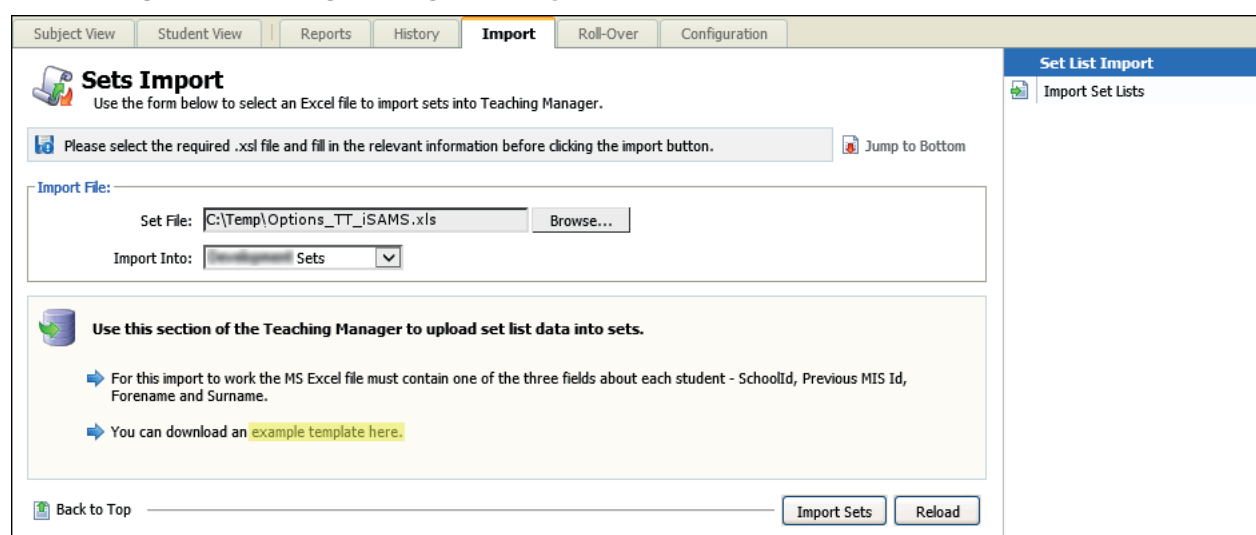It saves a file called: Options_TT_iSAMS.xls
This is the file that will be imported into iSAMS.

You can click on the Open now button to check that the file is correct and that every student
has the correct items. Perhaps make a few spot-checks?

Stage D : Importing the file into iSAMS

In iSAMS go to **Teaching Manager ➠ Import.**

Browse for the file from *Options*.
Choose whether you want to import the data into 'Development sets' or into 'Current sets'.

The steps are explained in more detail in the iSAMS documentation at:
https://documentation.isams.com/display/TeachM/Import+Set+List+Data

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