

## Exporting and Importing Data Guidance for SIMS 7

This document describes steps for importing student data from SIMS 7 into ReallySchool. SIMS 7 can export student data as CSV (comma-separated values) files. These files can then be used to import student data into ReallySchool.

For your convenience, you can download this template to make the process much quicker:

[RS Student Roll](#)

Once you have downloaded this file follow the instructions below.

Although we recommend using the template, if you would rather, you can design your own report. To do this see page 3.

### **Exporting data from SIMS 7 using the ReallySchool template**

1. Launch the SIMS.net application, and login as an admin user
2. From the file menu select **Reports-> Import->** Then select the ReallySchool template you downloaded (named **RS Student Roll**). Press **Import** then **close** the box.
3. Edit the Report
  - From the top menu select **Reports -> Design Report**
  - Select **Open**
  - Select the **RS Student Roll** report (the one you just imported)

4. Press **Next** until you reach the **Define filter page**

If you don't want to filter your report (*e.g. to only include some of your year groups*), then continue to press **Next** until you reach the **Define presentations** page and move on to step 6. If you want to apply filters, follow step 5.

5. Define Filter
  - By default, the report will export all students, classes, year groups etc. in the school.
  - You can filter what is exported on the **Define Filter** page.
  - For instance, the you may only wish to include specific year groups
  - To add filters, select **New** then pick the filters you want from the fields list
6. Define Presentations
  - Select **Text** under the **Select the presentation for the report** list
  - If you want the file location to differ from where you saved the template, then press **browse** and select a new location to save the report use the same name **RS Student Roll**
  - Ensure the name is showing as a **.csv** file and the **format** box says **Comma separated**

- Ensure the **suppress duplicates** box is **unticked**
7. Press **Next**
  8. You will now be on the **Design complete page** from here press **Run my Report**. When the popup box says the file has been created press **ok**
  9. Select **Save my report**
  10. Check the file has been saved in your chosen location on your device

### Importing Data in to ReallySchool

1. Log in to ReallySchool as an **admin** <https://portal.reallyschool.com>
2. Select **Manage school** from the sidebar
3. Select **Import**
4. Select **Choose file** and pick the **RS Student Roll** report that you generated (should be a.csv file)
5. Select **SIMS** for the **MIS Provider**
6. Click **Import**
7. After a few minutes the data will be imported in the ReallySchool system

*NB: If you keep certain information on another system (such as teachers), then you will need to manually add that to ReallySchool. Also, please note that ReallySchool will only import the main teachers that are assigned to the classes.*

For further assistance exporting or importing your data, please email [support@reallyschool.com](mailto:support@reallyschool.com)

*If you wish to create your own report instead of using the template provided, please follow the 'Designing your own report' guidance on the next page.*

## Designing your own Report

Although, we advise you to use the template (as above) for your convenience. You can also design your own report using the steps below.

### Exporting Data from SIMS using your own report

1. Log in to SIMS
2. Select the **Reports** drop-down menu at the top of the screen> Then select **Design Report**
3. You will now be in the **Report Designer mode** from here choose to **Create a new report**
4. You will be prompted to **Select Data Area**, choose **Student** as your focus from the list given, then press **Next**
5. You will be prompted to **Refine Data Area** ensure this is set to **on roll** then press **Next** again
6. Now it is time to select your data fields

Please note there are some fields where you will need to change the 'caption' (the text written in brackets) so that it matches with our format. *For example, when you add the parent title field it says (title) but you will need to change the caption to (Parent: title).* I will explain how to do this as part of the steps below.

To find the fields you need to select you can either **search for them in the search bar** (find) or you can use the guide below to **find their locations by category and sub-category**.

To select a data field, you **click on the relevant field** then press the **arrow** to move the field across.

Category	Sub-Category (if needed)	Field to select
<b>Basic Details</b>	<b>Chosen names</b>	<ul style="list-style-type: none"> <li>• Surname</li> <li>• Forename</li> </ul>
		<ul style="list-style-type: none"> <li>• Date of Birth [DOB]</li> <li>• Gender</li> </ul>
<b>Family home</b>		<ul style="list-style-type: none"> <li>• Postcode</li> </ul>
<b>Registration</b>		<ul style="list-style-type: none"> <li>• UPN</li> <li>• Year Group [Year]</li> <li>• House</li> </ul>
<b>Parental Consent</b>		<ul style="list-style-type: none"> <li>• Parental Consent</li> </ul>
<b>Ethnic/Cultural</b>		<ul style="list-style-type: none"> <li>• First Language Code</li> <li>• Ethnicity Code</li> <li>• English as additional language</li> </ul>
<b>SEN</b>		<ul style="list-style-type: none"> <li>• SEN Status Code</li> </ul>
	<b>SEN Needs</b>	<ul style="list-style-type: none"> <li>• Need Type Code</li> <li>• Need Start Date</li> <li>• Need End Date</li> </ul> <p>(Select <b>SEN Needs</b> and the arrow, then select the above fields. Click <b>Student</b> at the top of</p>

		your fields list to see all the field options again.)
<b>Additional Information</b>		<ul style="list-style-type: none"> <li>• FSM Ever 1</li> <li>• FSM Ever 6</li> </ul>
	Pupil Premium Funding Source	<ul style="list-style-type: none"> <li>• Pupil Premium Type</li> <li>• Pupil Premium FY Start Date</li> <li>• Pupil Premium FY End Date</li> </ul>
		(Select <b>Pupil Premium funding source</b> and the arrow then select the above fields and move them across with the arrow. Click <b>Student</b> at the top of your fields list to see all the field options again)
<b>Classes</b>	Classes	<ul style="list-style-type: none"> <li>• Class name</li> </ul> (Select <b>Classes</b> and the arrow then select <b>Class name</b> .)
	Teacher Detail-> Basic Details	<ul style="list-style-type: none"> <li>• Title</li> </ul> Here you need to change the <b>text in brackets</b> . To do this click on the <b>field</b> you moved across which will say 'Title of the teacher details..' then press on the <b>Caption</b> box and change the caption to say <b>Teacher: Title</b> For all the rest of the teacher fields listed below you need to repeat the above process so the <b>text in brackets matches</b> what is in brackets in <b>the list below</b> : <ul style="list-style-type: none"> <li>• Preferred surname [Teacher: Surname]</li> <li>• Preferred Forename [Teacher: Forename]</li> </ul>
	Teacher Details-> Contact Information	<ul style="list-style-type: none"> <li>• Primary Email [Teacher: Email]</li> </ul> When finished with all the teacher and class fields select <b>Student</b> again at the top of your list so you can see the rest of the fields.
<b>Contract</b>	Roles	<ul style="list-style-type: none"> <li>• Role</li> </ul>

<b>Parents</b>	<b>Contact</b>	For all parent fields the text in brackets needs to be changed again using the same method as before (select the <b>field</b> and type in the <b>caption</b> box) to <b>match the text in brackets below</b> : <ul style="list-style-type: none"> <li>• Title [Parent: Title]</li> <li>• Surname [Parent: Surname]</li> <li>• Forename [Parent: Forename]</li> </ul>
	Contact-> Contact Information	<ul style="list-style-type: none"> <li>• Mobile number [Parent: Mobile number]</li> <li>• Primary Email [Parent: Email]</li> </ul>
	Contact-> Contact Information-> Home address	<ul style="list-style-type: none"> <li>• Postcode [Parent: Postcode]</li> </ul>
		<ul style="list-style-type: none"> <li>• Relationship [Parent: Relationship]</li> <li>• Parental responsibility [Parent: Parental responsibility]</li> </ul>

- When you have added all the fields, select **Student** again at the top of your fields list to make sure the **focus** of the report says **Student**.
- Click next until you reach the **Define Filter** page (if you do not want to define filters as you want data for all students copied then move on to step 10)
- By default, the report will export all students, classes, year groups etc. in the school. You can filter what is exported on the **Define Filter** page. *For instance, you may only wish to include specific year groups.* To add filters, select **New** then pick the filters you want from the fields list.
- Press the **Next** button until you reach the Define **Presentation** page
- Where you have the option to **Select presentation for the Report** click **Text**
- Add a report **title** (e.g. Aston Infants Student Roll)
- Untick the box for **Supress duplicates**
- Choose the **format Comma separated (CSV)**.
- Add the **file name** and choose where to save it (e.g. Aston-studentroll.csv)
- Select **Next**
- You will now be on the **Design Complete** page. From here select **Run my report** and when the pop-up appears to tell you the report has been created then press **ok**.
- Press **Save Report** (choose a name, and press ok, it will go to the location you chose in step 15)
- The data now needs importing into ReallySchool, see the **section Importing data into ReallySchool** above for steps on how to do this.

*NB: If you keep certain information on another system (such as teachers), then you will need to manually add that to ReallySchool. The import can take up to 20 minutes.*

*If you have included all the data fields requested, then you should have 31 fields in total. When importing into ReallySchool, and selecting SIMS as the MIS provider, all of the fields should automatically map to a column name. If fields are still available to map, then it is likely that you*

*have exported the incorrect (or alternate) data fields from SIMS or you have not captioned the fields as requested. At this stage, you can choose to manually assign the unmapped field to the correct column name, or alternatively, you can go back into SIMS and select the correct field or modify the caption as per the instructions. You will need to regenerate the CSV report if you choose the latter option.*

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