

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.

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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.

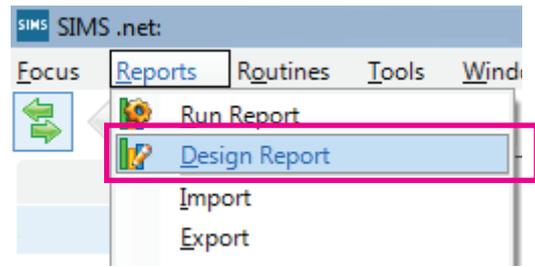
It is titled : [Exporting-Options-to-SIMS-viaSYLK.pdf](#)



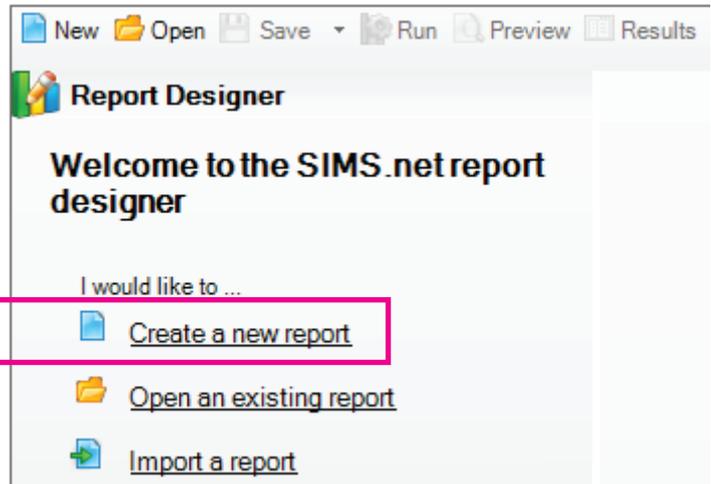
Exporting from SIMS

(An alternative method is shown on page 5.)

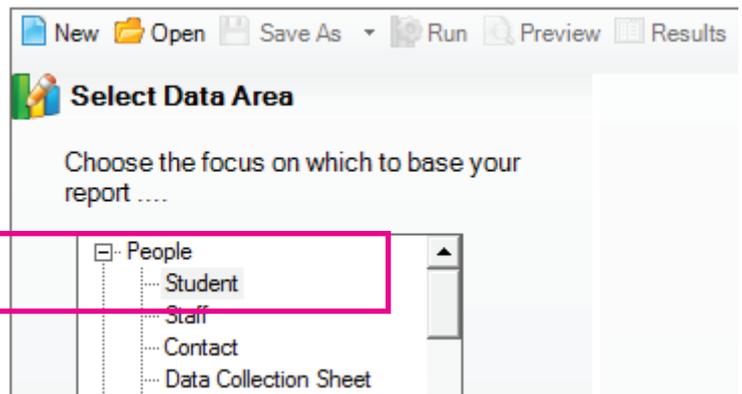
In SIMS, open **Reports**, and select **Design Report**:



The Report Designer opens:

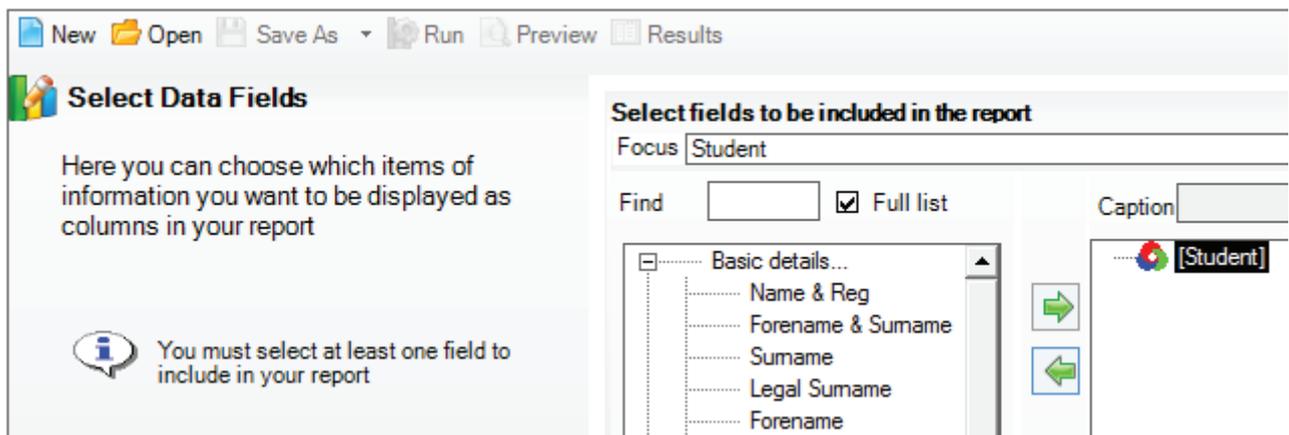


Choose 'Create a new report'.



And then choose 'Student' as the focus:

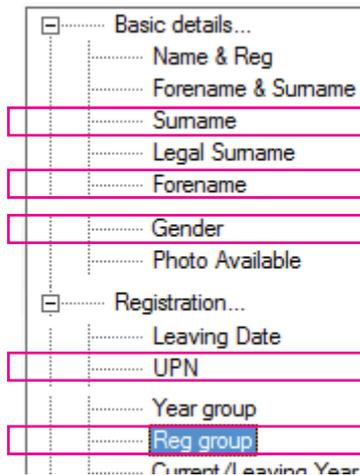
And then you have a screen on which you can choose which fields to include in the report (see more details on the next page).



continued...

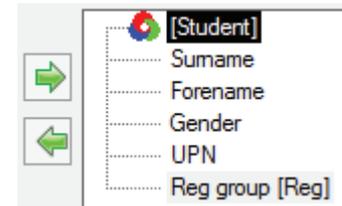
There is a long list of items that you can choose from, but the only 5 items that you need (for importing into **Options**) are:

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



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:

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



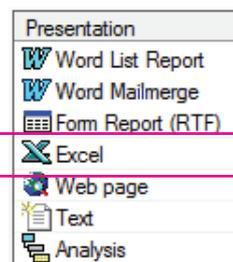
The next screen allows you to define a Sort Order.

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.

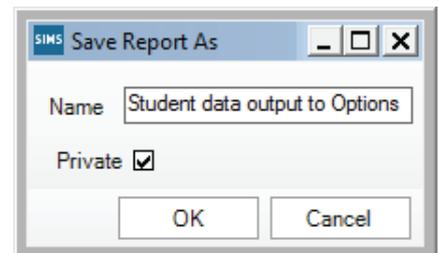
The next screen allows you to:

- choose the format, which is 'Excel', and
- enter a title for the file.



Report Title Student data output to Options

Finally, you can choose to Preview the Report, and to **Save** the Report:



If you run the saved file (in Excel) then it shows a spreadsheet like this:

	A	B	C	D	E
1	Surname	Forename	Gender	UPN	Reg
2	Adams	Steven	M	8317216230903	9A
3	Benson	Laura	F	9415316130652	9A
4	Charlton	Michael	M	7311412200867	9C
5	Dhaliwal	Ayesha	F	9714216110384	9B
6	Eastwood	Theo	M	8817516210983	9A

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).

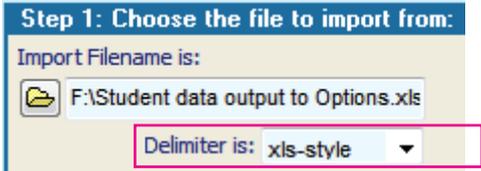
Importing into *Options*

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]

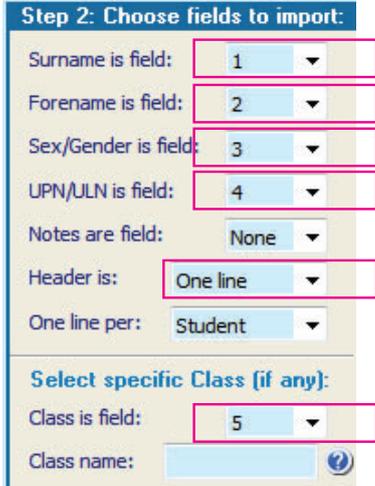
2. On the **Students & Choices Screen** [page 18], click on  and then click on  in section 2.

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:

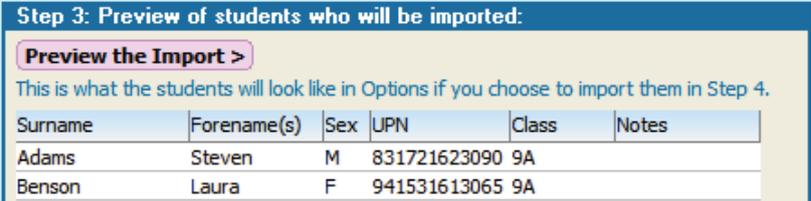


4. When you click on **Preview my File** you should see the same information (same fields) that you saw in the Excel file at the bottom of the previous page.

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



6. Then click the **Preview the Import** button, and check that the data looks correct (ie. same as on page 3):



Surname	Forename(s)	Sex	UPN	Class	Notes
Adams	Steven	M	831721623090	9A	
Benson	Laura	F	941531613065	9A	

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

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.

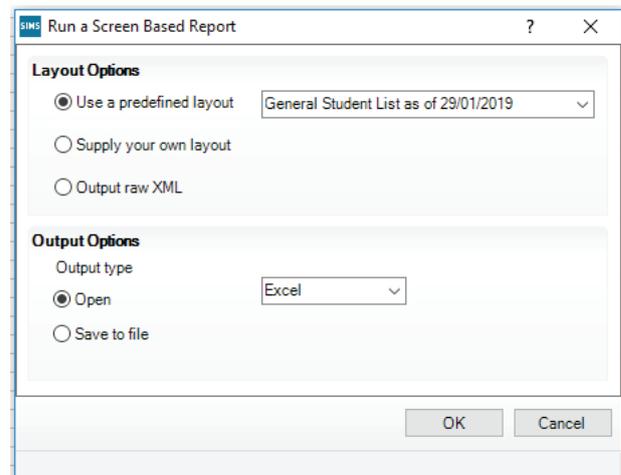
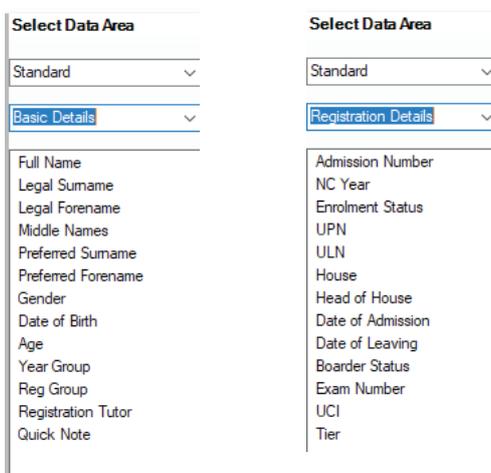
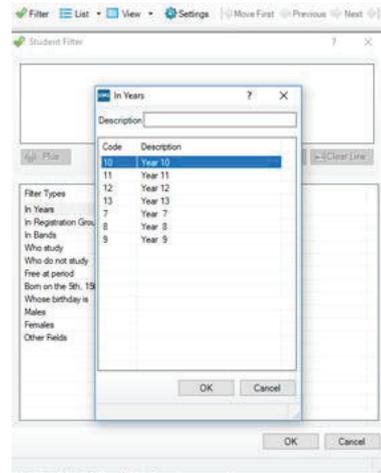
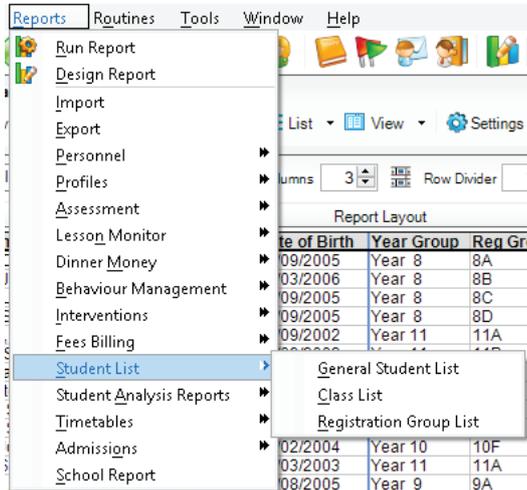
Note : See page 1 for a note about getting the completed data back into SIMS.



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:



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