# How to Import Student and Parent data from SIMS into ParentMail

There are a few things that you will need to do in SIMS.net before you are able to import into ParentMail.

Below is some information on the data we will extract, and what you need to do to your data before it can be imported.

# Student Details:

- Preferred Forename
- Preferred Surname
- External ID
- Year Group
- Registration Group
- Date of birth
- Gender

### Contact Details:

From section "5. Family/Home" we extract the following data for contacts where Parental Responsibility is ticked (unless they are a priority 9):

- Contact Type (relationship)
- Title
- Forename
- Surname
- External ID of the contact
- Primary email address
- Mobile number
- Address details
- Priority

You will need to ensure the email addresses (that you wish to export from SIMS and import into PMX) are marked as primary in SIMS.net. Only 1 email address can be marked as primary and so only 1 email address will be exported per contact. Only one mobile number will be exported per parent and it must be marked as 'Mobile'.

### See example below:

Contact details - Mrs Rac	hael Abbot					
💾 Save 🛛 🍎 Undo 📥 Pr 1 Basic Details 🛛 2 Relation:			4 Addresse		6 Job Details	7 Documents
I Basic Details 2 Relation:	ship Details 3 Telephones and E	mail Addresses	4 Addresse	is 5 Language	5 5 JOD Details	7 Documents
1 Basic Details						
Title	Mrs	-	Photograph			
Forename	Rachael					
Middle Name(s)						×
Surname	Abbot			07.1		
Gender	Female	•		Llick	for photographers	
Date of Birth		5				
Honours						
Salutation	Mrs Abbot	6				
Addressee	Mrs R Abbot	6				
Parental Ballot	2					
2 Relationship Details						
Student	Ben Abbot		Contact Type		Mother	-
Correspondence	Parental Responsibilit	ty 🔽	Priority		1	
Pupil Report	Court Order		Contact Priori	y Source		•
				-	,	
3 Telephones and Emai	I Addresses					
Telephones\Fax	Device Location	Number	Main	Primary	Notes	New 📄 New
Numbers:	Telephone Home	01456 1091				📂 Open
	Telephone Mobile	078000000	01 Yes	Yes		💥 Delete
				1		
				Set Primary	Set 1	Main
Email Addresses:	Address	Location	Main		tes	New 📄
	mrsabbot@home.co.uk mrsabbot@work.co.uk	Home Home	Yes	Yes		😕 Open
	misdbbb(_work.co.uk	Tionic				🔀 Delete
						Send
				C-1 Disco		
				Set Primary	Set 1	Viain

### SIMS Permissions

Before you can run the report, you will need to make a change to the permissions of the relevant SIMS user/s who will be responsible for running and exporting your school data.

To do this, open your SIMS.net software, and login using your administration username and password. After entering the password, click 'OK'.

- 1. In your SIMS, go to **Focus**.
- 2. Then click on **System Manager** *if you are unable to see this option in your list, this means you do not have System Manager permissions. Please login to SIMS from a SIMS user who has System Manager permissions.*
- 3. Select Manage Users.



- 4. **Search** for the applicable SIMS user here and click **Enter** *if you are unable to view your record here, change the* '*Role*' *from Employee to Any and click Enter*.
- 5. **Double click** onto the user listed to open the record details.
- 6. Go to **Section 3 Groups** and check for the required permissions: **Third Party Reporter** and **Admin Assistant**.
- 7. If you are missing either or both permissions here, click the **Add** icon on the righthand side for you to then select the missing permission.

3 Groups						
	Group Name	Status	Start Date	End Date	▲	🖶 Add
Effective Date	Admission Officer	Current	04/04/2005			/ Edit
26/11/2019 🔂	Assessment Co-Ordinator	Current	03/09/2002			
	Attendance Manager	Current	02/07/2002			Remove
	Bursar	Current	10/02/2017			📄 Сору
	Class Teacher	Current	05/09/2005			
	Cover Manager	Current	31/03/2008			
	Curricular Manager	Current	14/02/2007		<u>•</u>	

8. In the left-hand corner, select the option to **Save** again.

User Details: N	r Adrian Blacke	r			
💾 Save 🏼 🏐 I	Undo 📥 Print				
1 Basic Details	2 Login Details	3 Groups	4 Permissions	5 Telephones and Emails	6 Addresses

9. Finally, you will need to log out of SIMS and log back in for the changes to take effect.

#### Import the Report into SIMS

Firstly, you will need to import the report definition file into SIMS to enable you to run this report.

If you have already imported the report definition file into SIMS, then you won't need to do this again and you skip to the 'Running the Report' section.

The report definition file can be located as follows:

- 1. Login to ParentMail.
- 2. Select Imports and Create Import.

6	ParentMail		
	Can I help?	Create New Import	Read more
Ħ	Overview	To download the latest RPT def files to extract data from SIMS, click the 'Downloads' button and select the relevant RptDef file.	Downloads
	My Staff App	To create your import please click the 'Select CSV import file' below to locate the file on your computer/network that you wish to import.	
$\odot$	Absences		Select CSV import file
×.	Email		Remove Import
£	Payments 15	Once you have located the file to import click the "Queue import' button below.	
Ê	Registers		Queue Import
	Forms	Once the file has been added to the import queue it will be checked, imported and we will notify you by email of its progress. Please note: Only one import request	import
(p)	SMS	Overall entry vas been aaled to the import Quebert will be Crecket, import Quebert we will not you been aaled to the progess. Nease note: Only one import request can be in the quebe at a time. Imported files can be seen under the Imports/Imports menu section of ParentMail.	
۰	Parents Evening		
	Events		
	Users		
忠	Groups		
Ø	Imports 🗸		
	Create Import >		

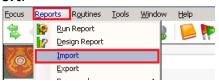
- 3. Click the '**Student Parent RptDef**' option and select the option to **Save As** *if it automatically downloads to your browser, click onto the arrow beside the report name and Open/Show in folder. You can then move the report into a location of your choice*.
- 4. **Save** the file to a location of your choice (wherever you will be able to select it from SIMS).

Please ensure the file you have saved has '.rptdef' at the end. If it shows as a 'zip' file, repeat the instructions above, this time when you select 'Save as' remove '.zip' and replace with '.rptdef'. Also, in 'Save as type' change this to 'All Files (\*.\*)' and select 'Save'.

In SIMS:

5. Click on **Reports** then **Import**.

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 On the import window, click open and find the file "PMX2 Student Parent Export.RptDef" and click Open.

🔤 Import report(s)			_ 🗆 🗡
Import reports and associate	ed templates from an archive		
Archive file	😅 Open		
Description	Status		Check All
		[	Clear All
Import associated template	18	Import	
		Close	

- 7. The status of this file should now say **Pending**. Click **Import** and the status will change to **Imported**.
- 8. Then click **Close** to close the window.

# **Running the Report**

1. Click on **Reports** and then **Run Report**.



- 2. Click into the Focus folder and then Student, locate the report: PMX2 Student Parent Export.
- 3. An **Export as text** will pop up, click on **Browse** and select a location to save your report to.
- 4. Save the report with a name and ensure it ends with **.csv**. i.e. parentmailstudentdata.csv. Leave the Comma Separated format option as it is.
- 5. Next, find the report you have saved in your location and double check the information on this. Once you are happy with the data, the report is now ready for you to import to ParentMail.

# Importing into ParentMail

- 1. Login to **ParentMail**.
- 2. Click Imports and select Create Import.
- 3. Select, **Select CSV import file** and find the report that you have saved to your computer, select the file and **Open**.
- 4. The file name will appear in green and you will now be able to select the **Queue Import**.
- 5. You will then receive a 'Success' message to advise that it has been successfully queued for importing.

Once you have imported your data, the system will produce a rejected records report showing all the anomalies of data that could not be imported, with the reasons why:

Student & Parent Rejected Records Report

If you require any assistance with this, please get in touch via Live Chat where a member of our Technical Support Team will be happy to help.