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:

SIMS Permissions

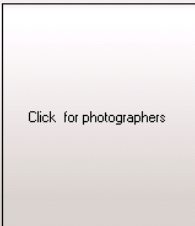Before you can run the report, you will need to make a change to the permissions of the relevant SIMS user/s who will be responsible for running and exporting your school data.

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.**
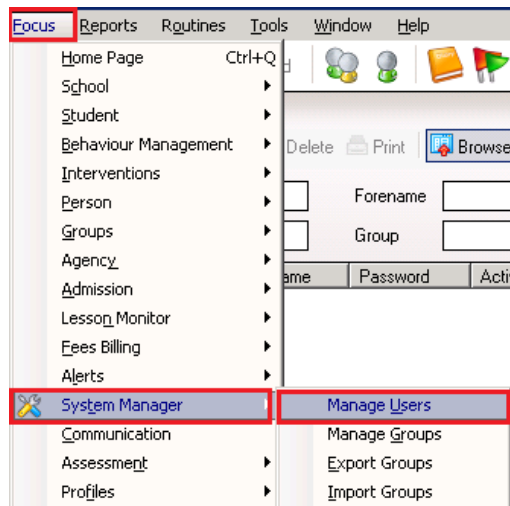
4. **Search** for the applicable SIMS user here and click **Enter** - *if you are unable to view your record here, change the 'Role' from Employee to Any and click Enter*.
5. **Double click** onto the user listed to open the record details.
6. Go to **Section 3 Groups** and check for the required permissions: **Third Party Reporter** and **Admin Assistant**.
7. If you are missing either or both permissions here, click the **Add** icon on the right-hand side for you to then select the missing permission.
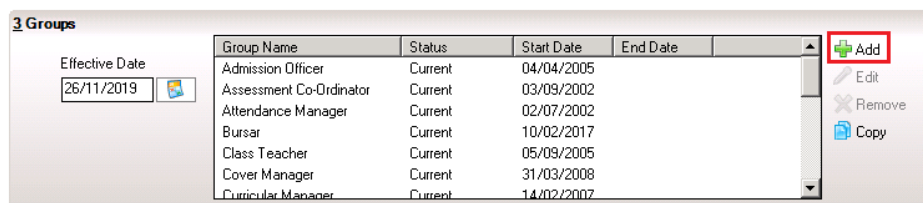
8. In the left-hand corner, select the option to **Save** again.
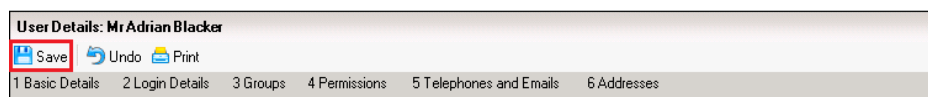
9. Finally, you will need to log out of SIMS and log back in for the changes to take effect.

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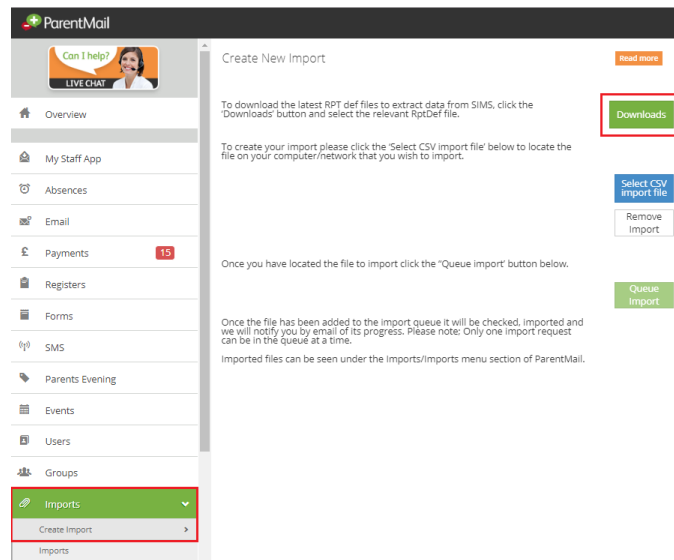
Firstly, you will need to import the report definition file into SIMS to enable you to run this report.

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**.

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**.
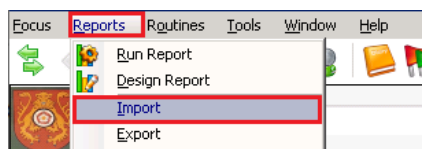
6. On the import window, click **open** and find the file "**PMX2 Student Parent Export.RptDef**" and click **Open**.
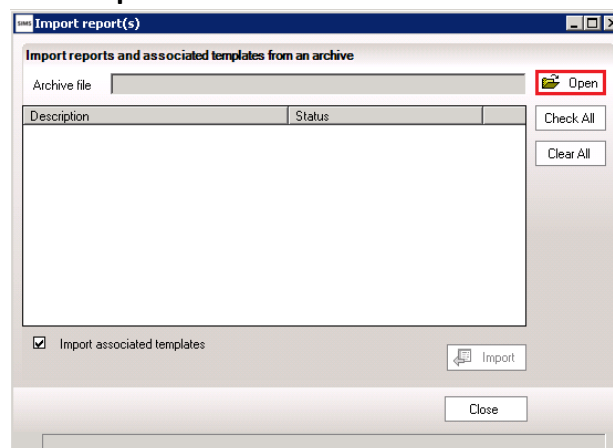
7. The status of this file should now say **Pending**. Click **Import** and the status will change to **Imported**.
8. Then click **Close** to close the window.

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.