

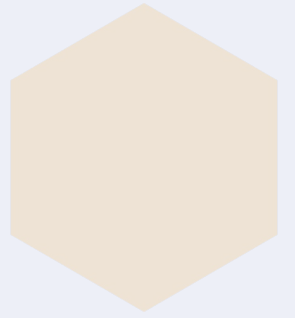
# DATA TRANSFER

**isams** By IRIS

Exporting applicant and contact data from Admissions+ into iSAMS

Admissions<sup>+</sup>  
Powered by applicaa





# Exporting applicant & contact data to iSAMS

## How data moves

Data is moved into iSAMS from Admissions+ using the Data area of your platform. This guide covers each step of the process. To cancel an export that has already started, please contact Support for assistance.

## Before you begin

Ensure you have created a pre-admissions group in iSAMS to receive the new applicants into before you start exporting any data from Admissions+.

## PART 1

# Exporting student & contact data

Set up School Manager, enrol your students, then run the export wizard.



## SETUP

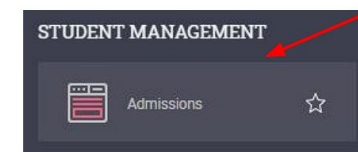
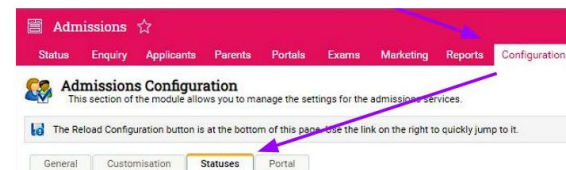
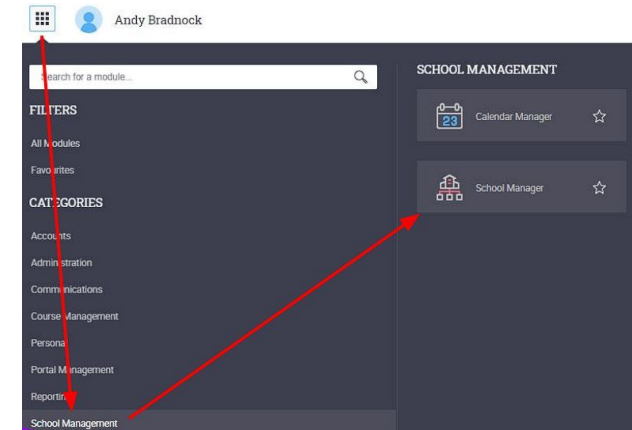
# Set up your School Manager in iSAMS

Create a School Term, Year and Form ready for the export.

1. Go to **View All Modules** → **School Management** → **School Manager**.

- **School Term** — School Terms tab → Create Term
- **Year** — Years tab → Create Year
- **Form** — Forms tab → Create Form

2. Go to **View All Modules** → **Student Management** → **Admissions**, then **Configuration** → **Statuses** to view your Admissions Statuses.



## ENROLMENT

# Enrolling students to be exported

When students are ready to be exported, they should be **enrolled in Admissions+**. You can do this two ways:

- **Student Profile method** — change the enrolment status on an individual profile.
- **Bulk Student Selection method** — select multiple students and use Change Enrolment Status.

For Sixth Form students, enrolment status changes to **enrolled** once they are placed on their Courses. Both methods above can also be used for Sixth Form students.

The screenshot displays the Admissions+ interface. At the top, the breadcrumb path is 'Registered students / Student profile'. The main header shows 'Test Student #U-2F98'. Below this, there are two status indicators: 'APPLICATION STATUS' (Completed 0/6) and 'ENROLMENT STATUS' (Pending). A dropdown menu for 'Change Enrolment Status' is open, showing options: 'Pending', 'Details to be checked', 'Ready to enrol', and 'Enrolled'. A red box highlights the 'Enrolled' option. Below the status indicators, there are tabs for 'Overview', 'Admission Form', 'Activities', 'Interview', 'Courses Selection', and 'Feedback'. The 'Student Info (External)' section shows 'Student Code' U-2F98, 'Application Reference Number' 823-B7CVByVw-016342, and 'Arbor ID'. Below this, there is a 'Joined Groups' section with a '+ Add to another group' button. At the bottom, there is an 'Advanced Filters' section with buttons for 'Change Application Status', 'Make Offer', 'Change Offer Status', 'Change Enrolment Status', 'Remove from group', 'Communications', 'Reset Password', 'Change Colour', and 'Bulk Update'. Below the filters, a table displays student information with columns for ID, Student Code, First Name, Last Name, and Birthdate. The table shows three rows of data, with the first row highlighted. A yellow box highlights the 'Change Enrolment Status' button in the 'Advanced Filters' section. Below the table, there is a 'Change Enrolment Status' dialog box with a dropdown menu set to 'Enrolled', a text input field containing '20', and 'Close' and 'Update' buttons.

ID	Student Code	First Name	Last Name	Birthdate
16675	U-1EE8	Test Amara	Test Rau	10/10/21
16881	U-351E	Test Anabel	Test Johnson	27/03/21
16883	U-90B8	Test Anderson	Test Mayer	19/03/21

# 1 EXPORT WIZARD

## Start an export

Go to **Data > Export**, click **Start an Export** at the top right, give your export a name, select **iSAMS**, then click **Next**.

The screenshot displays the 'Export Data' wizard interface. On the left, a vertical navigation menu includes 'DATA', 'Import', 'Export', and 'Uploaded Files', with 'Export' highlighted. The main content area shows a progress bar with five steps: 'Where to export', 'What to export', 'Field selection & configuration', 'Select Students', and 'Export Summary'. The 'Field selection & configuration' step is active. Below the progress bar, there is a text input field labeled 'Give your export a name' with the placeholder text 'Type name of export here'. Below this, the question 'Where do you want to download the data?' is followed by three options: 'An Excel .CSV File' (with a CSV icon), 'My School MIS' (with the 'isams By IRIS' logo), and 'A Zipped Folder' (with a ZIP icon). The 'My School MIS' option is selected. A 'Next' button is located at the top right of the wizard. Red arrows point from the 'Next' button in the progress bar to the 'Next' button at the top right, and from the 'Field selection & configuration' step to the 'My School MIS' option.

# 2

## EXPORT WIZARD

### Choose what to export

Select **Students**, then click Next.

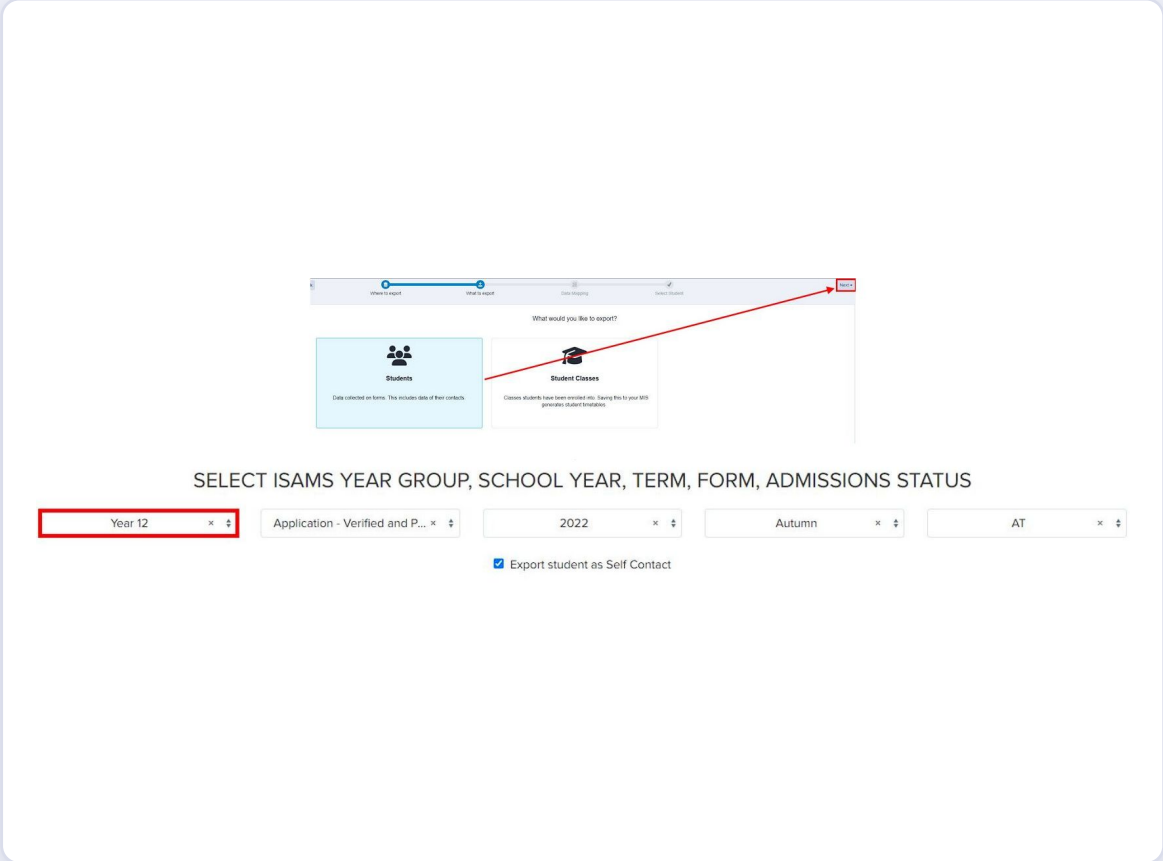
On the Mapping step, set:

**Year Group** (required) e.g. Year 12

**School Year**, **School Term**, **School Form** and **Admissions Status** (all optional).

Optionally tick **Export student as Self Contact**.

Once mapping is done, click Next.



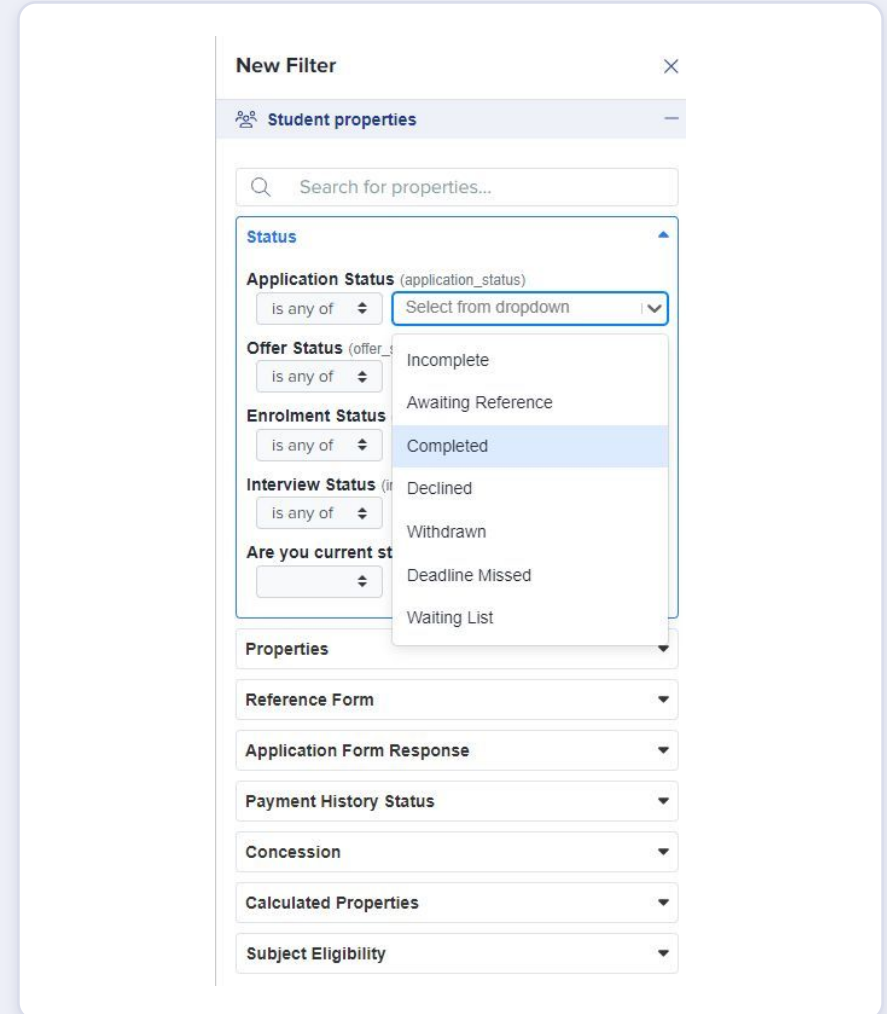
# 3

## EXPORT WIZARD

### Select your students

On the next step, you may use the **Advanced Filters** and then **Select All** students for your export if required — or select only the specific students you want to export.

Once done, click **Next**.



## STEP 4 · STUDENT MATCHING

# iSAMS student mismatch checking

Potential mismatched students are displayed if they differ from your MIS. Click **Resolve** for each. Choose **Ignore difference and continue exporting** to confirm a match, or **These are not the same person, unlink them** if not. Click Confirm & Next.

### Isams Student Mismatch Checking

**Potential mismatch students!**  
We have detected that **1 student** you are exporting from Admissions+ seems to have changed since it was originally in your MIS. This could be intentional, for example if a student has changed how they spell their name, or they may have moved house.

[Unresolved Matches](#) 1 [Resolved Matches](#) 0

Admissions+ Students	Isams Students	Resolution	Actions
<a href="#">See Me</a>	see mee	Not resolved	<a href="#">Resolve</a>

#### Resolve Potential Mismatch

Fields	Admissions Student	Isams student
Name	<a href="#">See Me</a>	see mee
Student ID	492	080634535867
Gender	F	M
DOB	10/10/2006	10-10-2006
Email	happy+se1@applicaa.com	
Address		

Select resolution:

Ignore difference and continue exporting  These are not the same person, unlink them

[Confirm & Next](#)

## STEP 4 · STUDENT MATCHING

# Reviewing resolved matches

Once resolved, students appear in **Resolved Matches**. Click **Change** to pick a different option if needed.

Click **Go to Student Matching** once all students have been checked.

**Please note** If there are too many mismatched students, you'll need to contact Support or your Customer Success Manager, and won't be able to continue the export.

**Isams Student Mismatch Checking**

**Potential mismatch student!**  
We have detected that **1 student** you are exporting from Admissions+ seems to have changed since it was originally in your MIS. This could be intentional, for example if a student has changed how they spell their name, or they may have moved house.

Unresolved Matches: 0 **Resolved Matches: 1**

Admissions Student	Isams Students	Resolution	Received on	Resolved by	Change resolution
Camryn Bins	camryn bins	Ignore difference and continue exporting	16 Feb 2023, 15:59	Andy Applcaaa Support	<a href="#">Change</a>

[Go to Student Matching](#)

**Potential mismatch students!**  
We have checked the data you are about to import, and multiple records in A+ seem to have changed significantly from when they were originally in your MIS. This appears to be the case with 82 records in this import... To prevent the possibility of corrupting the data in your MIS, we need you to create a ticket, so that we can have the team to take a look on it. [Download mismatch list](#)

[Raise a Support ticket](#)

## STEP 5 · STUDENT MAPPING

# iSAMS student mapping

Resolve any Unresolved Matches:

**Merge to iSAMS student** — merge with the selected student.

**Export as new student** — export as a brand-new iSAMS student.

**Skip this student** — do not export them.

Click Confirm & Next, then Next.

The screenshot displays the 'iSams Student Mapping' interface. At the top, a warning message states: 'Potential duplicates detected! We have detected that 1 student you are exporting may already exist in iSams. Please review the rows below and let us know if we should create a new person, or match it to an existing person? This typically takes around 1 minute to check.' Below this is a table with columns: 'Admissions\* Students', 'iSams Students', 'Matching Score', 'Resolution', and 'Actions'. A single row is shown with 'Test Dulce Test Barrows' in the first column, 'test dulce test barrows' in the second, a high matching score bar, 'Not resolved' in the Resolution column, and a 'Resolve' button in the Actions column.

A modal window titled 'Resolve Suspected Duplicates' is open, showing a comparison between two student records. The 'Admissions Student' has fields: Name (Test Dulce Test Barrows), Student ID (526), Gender (F), DOB (30-04-2015), Telephone (5572544169), Telephone 2 (90568819727), Email, LPN, ARN (823-RgWqHE4-000526), Address (22 Eascheap LONDON London,EC1M 1EU), and Contact 1 (Gmg3kact19549aa654). The 'iSams Student' has fields: Name (test dulce test barrows), Student ID (033811974743), Gender (F), DOB (30-04-2015), Telephone, Telephone 2, Email, LPN, ARN, Address, and Contact 1 (Gmg3kact19549aa654). The 'Select Resolution' section has three radio buttons: 'Merge to iSams student BY ID' (selected), 'Export as new student', and 'Skip this student'. A note explains: 'Export Admissions\* student as a new iSams student. This keeps information from both Admissions\* student and iSams student as separate records.' A 'Confirm & Next' button is at the bottom right.

## EXPORT REPORT

# Checking your export

Once the export finishes, click the report to check which students were exported successfully.

If there were any issues, the reason appears in the **iSAMS Notice** column for each student and their contacts.

Click the **iSAMS Student School ID** to view the application directly in iSAMS.

The screenshot displays a confirmation message box at the top with the text "Export Finished!" and "1 students were processed!". Below the message is a document icon and a link that says "Click to view report". A red arrow points from this link to the "iSAMS Notice" column in the first table below. The first table has columns: A+ ID, #, iSams Student School id, iSams Notice, forename, and surname. The second table has columns: #, iSams Student SchoolID, iSams ContactID, iSams Notice, first\_name, last\_name, email, and relationship. Red boxes highlight the "iSams Notice" column in both tables, and red arrows point from the message box to these columns.

A+ ID	#	iSams Student School id	iSams Notice	forename	surname
157	1	164350329644 <small>Student data was transferred to iSams.</small>	Success	Test Clyde	Test Ortiz

#	iSams Student SchoolID	iSams ContactID	iSams Notice	first_name	last_name	email	relationship
1	164350329644	6054	Success	Kenna36bb4204cfaeecf	Smitham36bb4204cfaeecf	parent36bb4204cfaeecf@appliance.com	Step Father
1	164350329644	6055	Success	Andy Test	Ortiz	atotest1234@appliance.com	Father

## PART 2

# Exporting classes to iSAMS

Map your Admissions+ classes to iSAMS classes to generate student timetables.



## CLASSES

# Before you export classes

### Prerequisites

Students must be enrolled to their chosen courses in Admissions+ with status **“enrolled”** before you export classes.

1. Navigate to **Data > Export**.
2. Click **Start an Export**.
3. Name your export, then select **iSAMS**.
4. Click **Next**.



Where do you want to download the data?



Give your export a name

Classes Export

## CLASSES

# Mapping classes to iSAMS

1. Select **Student Classes**.
2. Click **Next** to reach the Mapping step.
3. Choose a year via the **Academic Level** dropdown (you can also filter iSAMS classes by Keyword).
4. Your iSAMS classes should already be mapped to your A+ classes. If you can't see them, click **See all iSAMS classes**.
5. Click **Next** once done.

**Student Classes**

Classes students have been enrolled into. Saving this to your MIS generates student timetables

Please note that classes writeback is only available for students that have been admitted in iSAMS. You will need to admit external applicants before you can writeback their classes.

FILTER BY ACADEMIC LEVEL & KEYWORD

Subject B 12

MAP ISAMS CLASS AND ADMISSIONS+ CLASS

See all iSAMS classes

YEAR	ISAMS CLASSES	ADMISSIONS+ CLASSES
12	Year 12 Subject B - Class 1 Y12/S_B/Year Block 12/1 maximum: 0	Year 12 Subject B - Class 1 - Y12/S_B/Year Block 12/1 1 enrolled
12	Year 12 Subject B - Class 2 Y12/S_B/Year Block 12/2 maximum: 0	Year 12 Subject B - Class 2 - Y12/S_B/Year Block 12/2 0 enrolled

Back Next

## CLASSES

# Class export report

Click **Next** to reach the Export Report. Click the report to check which classes were exported successfully.

Use the filters below to select the classes in your MIS that you will link to your Options classes.  
Please note that classes writeback is only available for students that have been admitted in iSAMS. You will need to admit external applicants before you can writeback their classes.

FILTER BY KEYWORD & YEAR GROUP

type to search...


MAP ISAMS CLASS AND ADMISSIONS+ CLASS

[See all iSAMS classes](#)

YEAR	ISAMS CLASSES	ADMISSIONS+ CLASSES
8	Year 8 Subject B - Class 1 Y8/S_B/1 maximum: 0	Select a value
10	Year 10 Subject B - Class 1 Y10/S_B/Year Block 10/1 maximum: 0	Select a value
10	Year 10 Subject B - Class 2 Y10/S_B/Year Block 10/2 maximum: 0	Select a value
12	Year 12 Subject B - Class 1 Y12/S_B/Year Block 12/1 maximum: 0	Year 12 Subject B - Class 1 - Y12/S_B/Year Block 12/1 <b>1 enrolled</b>
12	Year 12 Subject B - Class 2 Y12/S_B/Year Block 12/2 maximum: 0	Select a value

Status	Teaching Set	Student ID	Student name	iSams Student School ID
Success	Year 12 Subject B - Class 1 - Year 12	157	Test Clyde Test Ortiz	164350329644

**Export Finished!**



[Click to view report](#)

## PART 3

# Exporting form group data

Assign students to Form Groups with the Sorting Hat Wizard, then export them to iSAMS.



## FORM GROUPS

# Exporting form group data

Use the **Sorting Hat Wizard** to assign students to Form Groups.

Once students have been allocated, their allocations can be exported — and students will be assigned to those groups in iSAMS.

Map each iSAMS registration form to the matching Admissions+ Sorting Hat group, then run the export.

Select data you want to export

Each column header below should be mapped to a property in Admissions+. Some of these may be already been mapped based on their names. Anything that hasn't been mapped yet can be manually mapped to a property with the drop down menu. If you decide to not import a property just leave it unmapped and it will be ignored.

[See all Arbor registration form](#)

**FILTER BY ACADEMIC YEAR**

Filter by academic year:

**Set Start Date & End Date**

Start Date:  End Date:

**MAP ARBOR REGISTRATION FORM AND ADMISSIONS+ SORTING HAT GROUP**

Showing 2 Arbor registration forms.

YEAR	ARBOR REGISTRATION FORMS	ADMISSIONS+ SORTING HAT GROUPS
2023/2024	Form 7BG (2023/2024) Tutor: Alice Morgan	Form 7BG (2023/2024) - 2023/2024 - <input type="text" value="selected"/> ✖
2023/2024	Form 7GF (2023/2024) Tutor: Georgia Miller	Form 7GF (2023/2024) - 2023/2024 - <input type="text" value="selected"/> ✖

## FAQs & useful links

### Should I export in batches or all at once?

Batches work best — around 20 students at a time until you're familiar with the process, then larger batches.

### When is the best time to export applicants?

Y7 & Primaries: as soon as they complete the Admission Form. Year 12: as late as possible, after Enrolment, to minimise data transferred.

### When should I import CTFs?

Export your data from A+ first, then import your CTFs directly to iSAMS.

### Where can I find more information?

Guides and articles on importing and exporting data are in the Data & Integrations area of our Knowledge Base.



# THANK YOU

Find this guide and more in the Data & Integrations area of the Applica Knowledge Base.