# **Data+ Guide**



If you have subscribed to our Data+ feature, you may use your system to complete data collection/checking exercises with with the parents of existing students at your school

## How to see your new form

Click on the blue wording in the upper left of your dashboard and then click "forms area/multiple forms"





### Your tiles area will appear and will look something like this:



Your new form will already have been created for you (cloned from your previous cycle) and you will see it in this area.

Please contact us if you believe you should have a Data+ form in your system but it is not visible: 020 3667 0764



Turn the toggle switch on to make it active - it needs to be active to enable importing/exporting with your MIS.

## Editing your landing page and other messages

Navigate to settings > form settings > landing page

Here you can edit your initial message to parents and check your configuration mode. For data collection, this should be set to "students and parents must be imported by staff".

Any changes you make will only impact your Data Collection form, so other forms will maintain their existing images and messages

#### **Configuration Mode**



- Students and parents must be imported by staff (1)
- Only parents can register ④
- $\,\bigcirc\,$  New Application area hidden completely



Navigate to "parent homepage" to edit those messages, update your settings and change any images as needed - this is what parents will see once they have logged in.

3	Parent Homepage	Landing Page	Application Groups	Form Groups	Student Profile	
	General Setting	gs				
	Parent Mus	t Accept School'	s Policy		Parent Must Accept Applicaa Policy	
•	General Welcon	me Message				Preview Preview
ris bai	Messages on pa	rent's homepag	ge		Parent Homepage Image	

The general welcome message is seen by parents across **all intakes**, but there is also a place for you to add a separate, Data Collection-specific welcome message if desired.



## You could consider changing your configuration to suit your intake:



### Also turn off:

- Show offer status
- Show courses you wish to study
- Show reference status

Show Application Status	
Show Offer Status	
Show Courses You Wish To Study	
Show Reference Status	

## **Checking your email templates**

# The email templates area is really useful and can automate a lot of your processes!



There are 2 automated emails you will need to check - you can preview and edit them by scrolling right on the table

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Top Tip: check all active emails to make sure the wording is appropriate for your purpose - make sure your templates refer to "data collection"

### Priorities for checking ahead of launch - filter your "send to" column to "parent":



Parent Welcome	Welcome to Applicaa High School
Notify Parent Application Complete	([STUDENT_FIRST_N AME]) ([STUDENT_LAST_N AME]) has completed their application to

"Parent Welcome" will be the email you send to them to provide their password and invite them to log in and complete the form

"Notify Parent Application Complete" can be activated to confirm parents have successfully submitted their form. Change the wording to acknowledge completion of Data Collection process instead!

# Your application phases and settings

Navigate to settings > application form > phase view and turn off any phases not in use (offers)





# You can also rename the Application Form phase to something more appropriate for your intake, if you like:

Customise Applicatio	Den Journey Step View Phase View			l Global Form Settings + Create Test Application
All Application Phases				>\$ Sort Phases + New Phase
Phases	Category	Visible to Applicants	Visible to staff on Filter  Filter	Actions
2. Application Form	Form Questions			V 🖉
3. Offer	Offer			$\nabla P$
Edit Step: Ad	Imission Form	×	At     Data Collection Admissions Year * <ul> <li>Knowledge Base</li> <li>I Settings / Student Application Form</li> </ul> Customise Application Journey         Step View           Phase: Account Creation         Step Name           Step 1: Enquiry [2]         Step 2: Student Registration	Phase View
Name	Data Collection Form		Step 3: Parent Registration	
Description			Step Name	
			Step 1: Supporting Documents	
			Phase: Data Collection Form	
			Step Name	
			Step 1: Child's Basic Details	

# **Configuring the Form - Step View**

The application form is broken down into steps; click on the name of a step to view the questions/fields within it, by navigating to Settings > Application Form.

Phase: Data Collection Form			⊃⊄ Sort Steps +	New Step
Step Name	Internal	External	Visible on Student Profile 1	Actions
Step 1: Child's Basic Details Click on the name of a step to open it		Choose which steps		00
Step 2: Parent/Carer Please list parent or carers in order of priority, starting with the contact that should be contacted first in the event of an emergency		On roll students will all count as "internal"		08
Step 3: Child's Welfare and Support Information		You can't disable		00
Step 4: Parental Agreement and Consent		"child's basic details"		00
Step 5: Child's Education		Step		10
Step 6: Additional Information				0 @
Step 7: Religion				0 13

You can choose which steps to have active and which questions you need parents to confirm the data for.

Within your form, make any changes to questions/fields - turn off anything you don't need parents to check/answer, and if there is anything new you need to collect from them, add it in!

Navigate to **settings > application form** and click on the name of a step to open it.

Click "+ New Question" and you will be prompted to choose what you would like to add.

UDFs can write back to your MIS, so they are great for capturing extra data that you don't have to manually input - you'll find them under "Pre-defined questions and fields".

You can also add questions in as "Custom Questions" - these will NOT write back to your MIS.

Here is a link to our form customisation guide.

Add a new question Sims User Defined Fields **Pre-defined Question & Fields** Custom Question student date sims udf 45 Date Picker **MIS Compatible** Non-MIS Compatible Test UDF sims udf 4018 **Dropdown Sinale** SIMS Select Explanation Text Block Add paragraphs to the form so you can explain more details to applicants.

Fields which have the SIMS logo mean the data is transferrable into and out of SIMS.

User-Defined Fields will also write back to SIMS, so you can add any UDFs into your form, as shown on the previous page.

Student Legal Forename	SIMS
(Preferred) Forename	SIMS
Student Middle Names	SIMS
Student Legal Surname	(SIMS)
(Preferred) Surname	SIMS

Not seeing your **User Defined Fields**? This will mean you need to make an update in your MIS first and then re-integrate!

Add your UDFs in your MIS, then:

Log into the A+ SIMS App - it will scan for updates and ask you to carry the updates over into A+



Preview the whole form as internal students to see the form from the perspective of the parent and check if it is all working as expected

Step 1 Student Basic Details	Step 2 Parent/Carer Details	Step 3 Support Information	Step 4 Agreement	Step 5 Religion	Additional Information	Step 7 Education	Cou
Student Basic Details Please upload a recer Choose File No file Remove?	nt passport-style photogr	aph of yourself					
Legal First Name*			Legal Las	t Name*			
Test Internal FN			Test Ex	ternal FN			
(Preferred) First Name			Middle N	ame(s)*			
Family Surname*			Gender*				
			Male				×
Date of Birth*			Year grou	p applied fo	r*		
Dute of Dirth							



# **Exporting data from SIMS to A+**

Important housekeeping:

If any students already exist on another form within your Admissions+ system, please raise a ticket to request a bulk deletion of those students so your system is clean before transferring the students over from SIMS.

Example:

If you used your system for Year 7 admissions last cycle and you now want parents to complete their Year 8 Data Collection, please ask us to bulk delete them from last year's Year 7 cycle first.

Data is moved into and out of SIMS via the Admissions+ SIMS App.

# In the SIMS App, choose "export applications" and select which form you wish to export them to (eg Data Collection)



#### Who would you like to export to Admissions+?



### Select "existing enrolled students" and then filter for the year group(s) you would like to export.

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	6. Distary	0	10	Harlional Identity		Parental consent			
Registration					-	13. User Defined Fields			
UPN 🖾	Eligible for Free Meals	<b>u</b>		9. Additional Information		(	-		

Choose which data you would like to export from SIMS, to be used in your data collection exercise.



You will definitely want to be able to email their contacts - you can choose which contacts this applies to though, for example just those with priority 1. Do you want to be able to email the contacts of these children using Admissions+?

This does not change the number of contacts imported. All contacts for a student will be imported into Admissions+.



Above, please select the filter for setting which contacts can receive parental emails through Admissions+



### Do you want to make it possible for contacts to log in?

This does not change the number of centects imported. All contacts for a student will be imported into Admissions r. This is usually only used for students in years 10 and below where parents are the ones completing the form. Your form (Year 12 Admissions 2022/2023), is currently sot so that ONLY Students, can log in and complete a form.

Yes, I want to select which contacts are able to log in.

No, please export SIMS contacts to A+ with logging in turned off. Please rate, this will not change the settings for contacts that we already on A+



You are also able to control which contacts will have the ability to log in.

At least one contact needs to be able to log in, so they can complete the form - again, you could restrict this to Priority 1 only, for example.

#### Above, please select the criteria for setting which contacts should have parental login enabled

 Select Students	Configure Email	Configure Lights	Review contacts	Export & Summary
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	@ Revie	w Student		
				BACK EXPORT

You will see a summary of your export, and it will then commence.

Once exported, the students and their data will exist in your A+ system and you can send the welcome email to the parents by navigating to Data > Import.

Click the import report, where you will see the names of the parents, and the button to "send welcome email".

Name	Status	Report
Import Students From Sims Application 08 November, 2022 15:13 Students	completed	
iew Import Students From Sims Application 08 November, 2022 15:13 ents	Send Welcome Email	iew Email 🔗 Edit Email

# **Managing Your Submissions**

### Use dashboard tiles to track which parents have and have not completed your form, and chase up the incompletes!

Data Collection Admissions Year 👻 🔞 Knowledge Base	Q Enter 3 or more letters to search	Re
Overview         Reports         Recent Activities         Application Groups         Offers           Tiles <td< th=""><th>Tasks Calendar All Activities Group Link</th><th></th></td<>	Tasks Calendar All Activities Group Link	
O Registered Students	O Complete	E O Incomplete

# **Chasing Incompletes**

You can chase incomplete forms by sending reminders to the parents - either manually, or by scheduling an automated chaser.

Click the "incomplete" status on your main dashboard.

Select them all using the checkbox and then click "communications" > "send email".

You can then type a message and send to the parents of the selected children, or insert a premade manual template.



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Change	Applicat	ion Status	Make Offe	r Change O	ffer Status Cha	inge Enrolment Status	Change Internal Status	Change Phase Status	Add to group	Remove from group	Communications Reset Pas
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	ID	ti St	tudent Code	t. F	irst Name	1. Last Name	Birthday	1. Gende	r	1. Email/Username	Send Custom Email to Referee Send Notification
	20	N	U7M	C	leesha	Assani	05/07/2010	Female		kalpnabhudia@yahoo	Send Student Welcome Email Send Parent Welcome Email
	21		XNC	100	eesha	Assani	05/07/2010	Female		mitesh.assani@gmail	

To schedule an auto-chaser, navigate to communications and events > communications > manual messages and click + New Message

Set your initial configuration and move through the wizard to send the message "when an applicant does something" > "has been incomplete for a certain amount of time".

When a student's form meets these parameters, the email will then be triggered and sent to the parent automatically.

		Set Up Advan	Our ced Settings Em	O sali Template
	Communication Type * Email	× :	Template Name 0 *	
	Subject Header * Please complete admission form		Target Audience * Parent	
Set up how would like to send this er	mail here			
When applicant does what? *				When applicant does what? *
Automatically when an applicant d	oes something		× ‡	Has been incomplete for certain amount of time
Select phase applied to *				
Data Collection Form			× *	
Send after 5 day(s) 0	hour(s) 0 minute(s)			
Repeat email after every 5	day(s) until they submit			

## Importing data to SIMS from A+

### Click the icon to Import Applications from A+ to SIMS





## Choose the form which you would like to import the data from (eg Data Collection)



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Select the students you are wishing to import, and they will be detected as "existing" within SIMS A Advenues Milling

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Choose which data you would like to import for the students. There is a "select all function".





The "contacts matching" step checks for any data added by the parent, which matches an existing contact in SIMS (duplicate prevention feature).

The "addresses" step detects any changes to the address currently held in SIMS, vs the address being imported - you then decide which address to keep. You will see a summary and the import will commence. On completion you will see a report, to highlight successes and any errors.

Forms Applican	Contractions New Applications	Entry Application Existing Students	Contacts Matching	Addresses Support & Summa
New Applications	Existing Applications	Existing Students	Contacts Matching	Addresses Mone to new addresses blage at same addresses blage at same blage at same addresses blage addresses blage addressese
		<ul> <li>Beylew sainting studients</li> </ul>		Review addresses      BACK BAPOET

Once you have completed your data collection exercise, contact us to request a bulk deletion of the data from your A+ system, so your system is clean again ahead of the next round!

#### IMPORT APPLICATIONS REPORT

	of the second to			
	NO. 8	FUEL NAME &	MESSAGE &	THE = -
14	1	Tutan Islant	Import student data SUCCESS with 4 successes.	Success