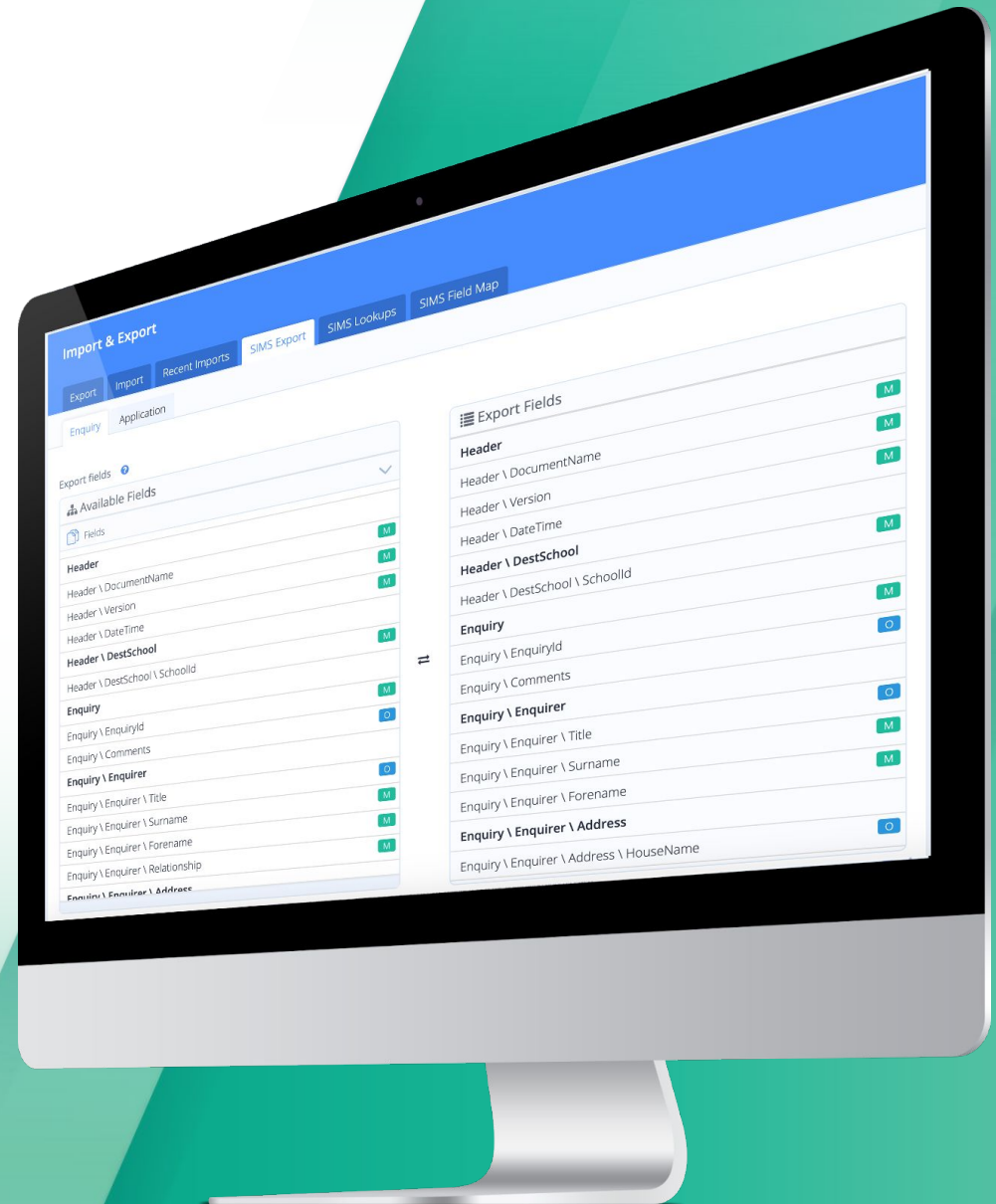




Getting Started with OpenApply

SIMS Export



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What is SIMS Export?

Transfer Incoming Pupil Data

Overview



- ✓ Export data into an XML file suitable for SIMS import
- ✓ Pre-map fields and field values between OpenApply and SIMS





SIMS Export Overview

*Template Exports to
save you time!*

Export SIMS Data via the Applicants Roster

You can export SIMS Data for a filtered list of applicants directly via the **Enquiries, Applicants or Students** roster. This can be done by taking the following steps:

1. Click the **Filter** to filter for whichever groups of applicants you require. For example, you can filter by grade, status, gender or custom fields
2. Click to select some or all of the students
3. Click **Export**
4. Then select either the **SIMS XML Enquiry Export** or **SIMS XML Application Export**

You can then proceed to the export page, to select the fields and export them for the selected students.

The screenshot displays the SIMS Applicants Roster interface. On the left, a sidebar menu lists various sections: GENERAL (Dashboard), CRM (Contacts, CRM Roster, CRM Settings), CRM ANALYTICS (Source, Email Campaign, Mailing List, Log Activity), STUDENTS (Enquiries, Applicants, Students, Families, Alumni), and RE-ENROLMENT (Re-Enrolment). The 'Applicants' section is highlighted with a red box and a red circle labeled '2'. The main area shows a table of applicants with columns for Programme, Student Name, Status, Enrolment Year, Gender, Enquiry Date, and Tags. A red circle labeled '1' points to the 'Filter' button in the top right. A red circle labeled '3' points to the 'Export' button in the top toolbar. A red circle labeled '4' points to the 'SIMS XML Enquiry Export' option in the dropdown menu that appears after clicking 'Export'. The table shows 50 students selected, with a total of 192 available. The table includes rows for Middle, Secondary, Primary, and Middle programmes, with student names like Berki A., Faina, Shirin Amarnani, Rósalind Arnórsdóttir, and Laura Artemieva. The status column shows 'Applied' and 'Admitted'. The Enquiry Date column shows dates like Jan 2, 2021, Jan 6, 2021, Jan 12, 2021, Sep 28, 2019, and Feb 8, 2021. The Tags column includes labels like Staff Child, Boarding, Alumni Family, EAL 3, Gifted, IGCSE, and Mandarin.



Selecting Fields to Export

Via **Settings > Import & Export > SIMS Export**

- Drag & drop from **Available Fields** on the left to **Export Fields** on the right, to select the fields you would like to export.
- Make sure to include all of the mandatory fields (indicated with a green 'M').

The screenshot displays the 'Import & Export' configuration window. The 'SIMS Export' tab is selected and highlighted with a red box. Below it, the 'Enquiry' sub-tab is also highlighted with a red box. The interface is divided into two main panels: 'Available Fields' on the left and 'Export Fields' on the right. In the 'Available Fields' panel, the 'Enquiry \ Comments' field is circled in red. A red arrow points from this field to the 'Export Fields' panel, where it has been added to the list. The 'Export Fields' panel shows a hierarchical list of fields, including 'Header', 'Header \ DestSchool', 'Enquiry', 'Enquiry \ Enquirer', and 'Enquiry \ ProspectivePupils'. Each field in the 'Export Fields' list has a green 'M' icon next to it, indicating it is mandatory. The 'Enquiry \ Comments' field is also highlighted with a red box in the 'Export Fields' list.

Available Fields	Export Fields
Header	Header
Header \ DocumentName	Header \ DocumentName
Header \ Version	Header \ Version
Header \ DateTime	Header \ DateTime
Header \ DestSchool	Header \ DestSchool
Header \ DestSchool \ SchoolId	Header \ DestSchool \ SchoolId
Enquiry	Enquiry
Enquiry \ EnquiryId	Enquiry \ EnquiryId
Enquiry \ Comments	Enquiry \ Enquirer
Enquiry \ Enquirer	Enquiry \ Enquirer \ Surname
Enquiry \ Enquirer \ Title	Enquiry \ Enquirer \ Forename
Enquiry \ Enquirer \ Surname	Enquiry \ Enquirer \ Relationship
Enquiry \ Enquirer \ Forename	Enquiry \ ProspectivePupils
Enquiry \ Enquirer \ Relationship	Enquiry \ ProspectivePupils \ Surname
	Enquiry \ ProspectivePupils \ Forename



Configure Export Templates

On the SIMS Export page at the bottom, you can also do the following:

1. **Edit or delete templates**
2. Add an optional **Comment**, which will be included the export. The comment can have a maximum of 512 characters
3. Assign a **Template name**
4. **Create New Template** with the selected fields
5. Enter the **Export file name**
6. Click **Export** to proceed with the export

The screenshot shows a web interface for configuring export templates. It features a 'Templates' section with a list of templates, an 'Export comment' text area, a 'Template name' input field, an 'Export file name' input field, a 'Create New Template' button, and 'Cancel' and 'Export' buttons at the bottom right. Red numbered callouts (1-6) highlight specific elements: 1 points to the edit/delete icons for a template; 2 points to the 'Export comment' text area; 3 points to the 'Template name' input field; 4 points to the 'Export file name' input field; 5 points to the 'Create New Template' button; and 6 points to the 'Export' button.

Templates

Student Export

Export comment:

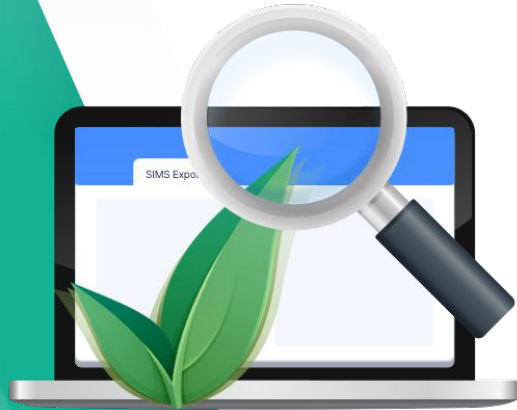
Template name

Export file name

Create New Template

Cancel or Export





SIMS Lookups

Custom value mappings

SIMS Lookups

It is possible to assign custom value mappings so that a predefined OpenApply field (Dropdown Menu, Multiple Choice or Checkbox type field) can be assigned descriptions and SIMS field codes that the SIMS system can interpret.

Navigate to **Settings > Import & Export > SIMS Lookups** to assign SIMS Field descriptions and codes, as necessary

1. Click to **Choose Lookup Field** that you would like to assign SIMS Field descriptions and codes for
2. Enter the relevant **SIMS Field (description)** and **SIMS Field (code)**, for each possible field value
3. Confirm via **Save Changes**

Import & Export

Export Import Recent Imports File Export Contacts Export Contacts Import SIMS Export **SIMS Lookups** SIMS Field Map

Enquiry Application

Choose Lookup Field:

enquiry / prospective_pupils / gender

OpenApply Field Definition ⓘ

gender

OA Field	SIMS Field (description)	SIMS Field (code)
Male	male	m
Female	female	f

Cancel or **Save Changes**



Some lookup fields, such as `proposed_year_group`, only require a value definition, rather than a description/code pair.

In this case, simply enter the corresponding **SIMS Field (value)** for each possible value.

Import & Export

ExportImportRecent ImportsFile ExportContacts ExportContacts ImportSIMS Export**SIMS Lookups**SIMS Field Map

EnquiryApplication

Choose Lookup Field:

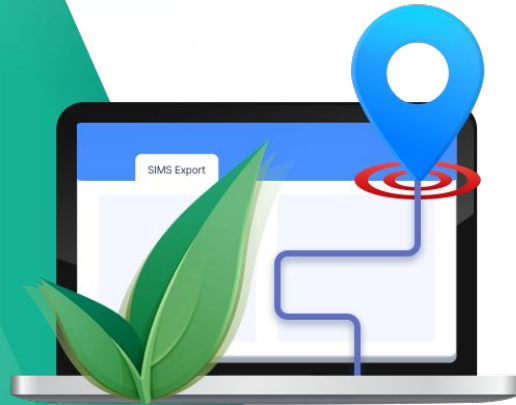
enquiry / prospective_pupils / proposed_year_group

OpenApply Field Definition ?

proposed_year_group

OA Field	SIMS Field (value)
Kindergarten	<div>KG</div>
Grade 1	<div>G1</div>
Grade 2	<div>G2</div>
Grade 3	<div>G3</div>
Grade 4	<div>G4</div>





SIMS Field Map

Organise your Data

SIMS Field Mappings

View all SIMS Field Tags and their OA equivalent values under the **SIMS Field Map**

Navigate to **Settings > Import & Export > SIMS Field Map** to map as necessary

1. Click the down arrow under OA Field Name / Constant Value in the row of the corresponding SIMS Field Tag
2. Search or select from the dropdown list to assign that value, such as Relationship.
3. Confirm via **Save Changes**

The screenshot displays the 'Import & Export' section of a software interface. The 'SIMS Field Map' tab is selected and highlighted with a red box. Below it, the 'Enquiry' sub-tab is also highlighted with a red box. The main area contains a table with three columns: 'SIMS Field Tag', 'OA Field Name / Constant Value', and 'Mandatory'. The table lists various field mappings, including 'Header \ DestSchool \ SchoolID />', 'Enquiry \ EnquiryID />', 'Enquiry \ MarketingSource />', 'Enquiry \ Comments />', 'Enquiry \ Enquirer \ Title />', 'Enquiry \ Enquirer \ Surname />', 'Enquiry \ Enquirer \ Forename />', 'Enquiry \ Enquirer \ Relationship />', 'Enquiry \ Enquirer \ Address \ HouseName />', and 'Enquiry \ Enquirer \ Address \ HouseNumber />'. The 'OA Field Name / Constant Value' column shows different values for each row, such as 'Generated', 'Select', and a dropdown menu. The 'Mandatory' column indicates whether each field is mandatory (green button) or optional (blue button). A dropdown menu is open for the 'Enquiry \ Enquirer \ Relationship />' row, showing a search bar and a list of options: 'Select', 'Relationship' (highlighted with a red circle), 'Gender', 'Suffix', 'Treat Parent as Emergency Contact', 'Home Address - Country', 'Nationality', and 'Second Nationality'.

SIMS Field Tag	OA Field Name / Constant Value	Mandatory
< Header \ DestSchool \ SchoolID />	Generated	Mandatory
< Enquiry \ EnquiryID />	Generated	Mandatory
< Enquiry \ MarketingSource />	Select	Optional
< Enquiry \ Comments />	Generated	Optional
< Enquiry \ Enquirer \ Title />	Select	Optional
< Enquiry \ Enquirer \ Surname />	[Search Bar]	Mandatory
< Enquiry \ Enquirer \ Forename />	Select	Mandatory
< Enquiry \ Enquirer \ Relationship />	Relationship	Optional
< Enquiry \ Enquirer \ Address \ HouseName />	Treat Parent as Emergency Contact	Optional
< Enquiry \ Enquirer \ Address \ HouseNumber />	Nationality	Optional





FAQs

Answers at your fingertips!

FAQs

Do the fields need to be mapped each time?

- ↳ Not at all! Schools typically map fields during implementation, and the SIMS Export can be conveniently used without having to map fields each time.

What if I need to adjust the export depending on the age or type the pupil?

- ↳ You can save multiple export templates so that you can quickly select the appropriate data to export for the pupil.

Are files supported in the export?

- ↳ Files are not included in the SIMS Export. We have a separate files export feature that allows you to export files in bulk for each pupil.

Can we import SIMS data to OpenApply as well?

- ↳ Yes, if your school has been using SIMS for a while, we'd be happy to help with SIMS data importing. All you need to do is send us the exported data to support@openapply.com, and we can start from there.



Support

First Class Support

	Online Support Centre	Telephone Support	Email Support
Includes	<p>Fully indexed documentation with keyword search allowing users to find tutorials quickly:</p> <ul style="list-style-type: none">✓ 10+ QuickStart guides✓ 20+ video tutorials, ranging from 3 min short tips to 30 min step-by-step guides✓ 150+ tutorials with annotated screenshots and written instructions✓ Free webinars for professional development	<p>Our friendly, knowledgeable support team provides fast phone support with no phone trees!</p> <p>Performance in 2019:</p> <ul style="list-style-type: none">✓ Calls received: 1,500+✓ Average duration: 06:00 minutes	<p>Requests are handled by a globally distributed support team through a dedicated ticketing system called ZenDesk. All replies are sent within 24 hours of the original request.</p> <p>Performance in 2019:</p> <ul style="list-style-type: none">✓ Requests received: 8,000+✓ Replies within 1 hour: 20%✓ Replies within 1-4 hours: 44%✓ Resolved within 8 hours: 60%
When	24/7/365 across any device with printable PDF guides for every tutorial and guide.	24 hours a day during the work week, starting at Monday 8am HKT (GMT+8) and ending at Friday 6pm PST (GMT-7/-8 depending on daylight savings).	24 hours a day during the work week, starting at Monday 8am HKT (GMT+8) and ending at Friday 6am PST (GMT-7 / -8 depending on daylight savings). Dedicated weekend support for urgent queries.



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