Cloud School MIS Admissions+ Guide Book (Year 7 Data Collection)
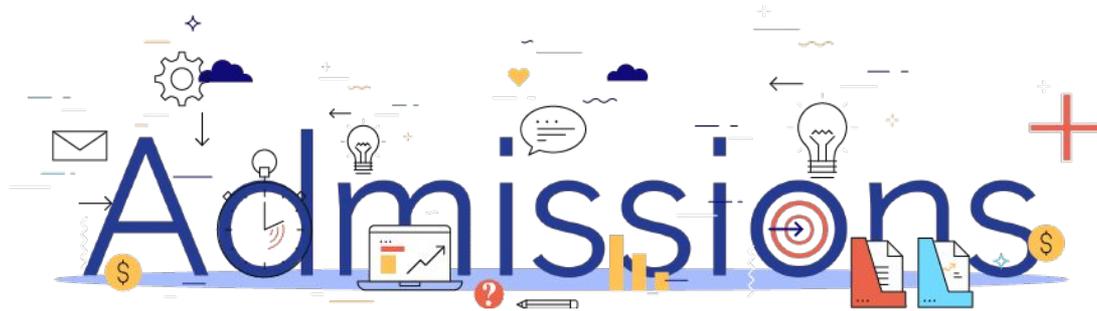
Guide Book - Contents
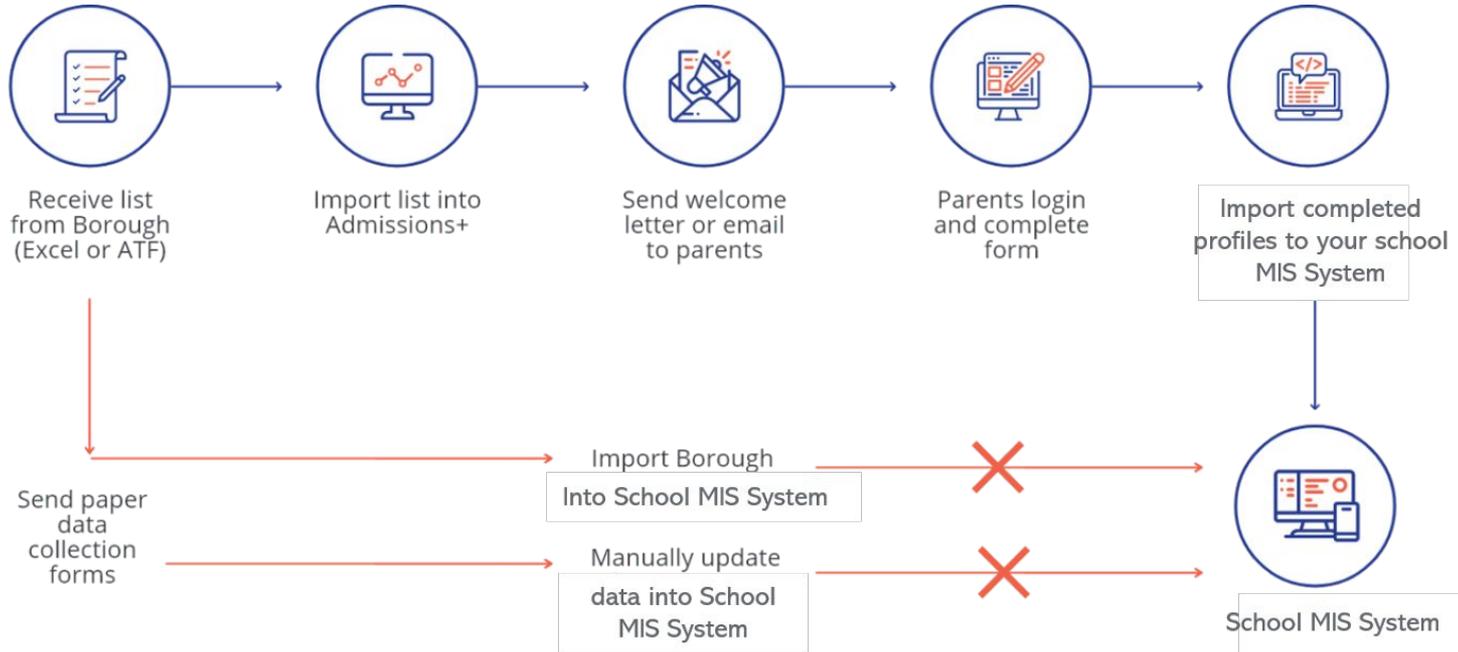
Year 7 Data Collection Process

The process for collecting data using Admissions+ is illustrated below.

Please note, that the information/offers received from your Local Authority **should not** be imported into your school MIS System (e.g., SIMS, Bromcom or Cloud School).

1. The parents and students should first be imported into Admissions+,

2. A welcome email sent to parents so they can complete the forms

3. Once parents have submitted the forms, you can transfer the data from Admissions+ to your school's MIS System

Receive list from Borough (Excel or ATF) → Import list into Admissions+ → Send welcome letter or email to parents → Parents login and complete form → Import completed profiles to your school MIS System

Send paper data collection forms

Import Borough Into School MIS System ✗

Manually update data into School MIS System ✗

School MIS System

Section 1: Cloud School API Integration with Admissions+

1. **Before you start to export data to your Cloud School MIS from Admissions+ you need to ensure your system is integrated with your MIS by setting up Applicaa for REST API.**

2. Log-in as School Administrator in Cloud School.

3. Go to **System → Web API V2 → Manage Companies Access**

4. Click on the **+** to add a new record.
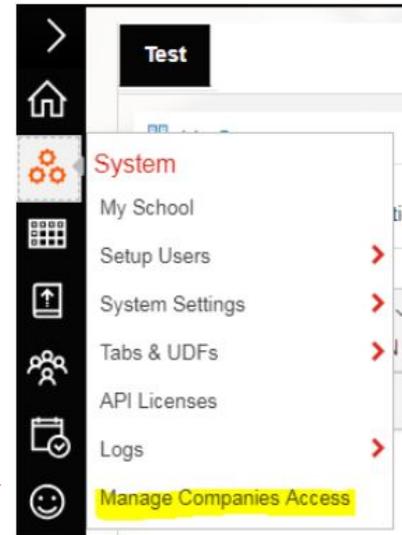
Manage Companies Access

Company Name	Email	Active
AL Tech Team	sally.robinson@oneadvanced.com	✓
Progresso Mobile App	sally.robinson@oneadvanced.com	✓

|◄ ◄ **1** ► ►| 20 ▼ items per page   1 to 2 of 2 items

5.   Select **Applicaa** from the drop down list

6.   Under username, enter the username **applicaa_api** this is the username Admissions+ will use for API Authentication.

You will also need to ensure that **Active** and **Core School Process** are ticked as highlighted on the next page.

Section 1: Cloud School API Integration with Admissions+

7. Please also ensure to tick Modify in header of the table. This will give Admissions+ the appropriate permissions to import and update information.

8. Click the save icon on the top right of the window to save the user. You will see the record has been added to the list.

    At this stage, an email will be sent to **Applicaa** with a User Id and password which we can use to access the REST API.
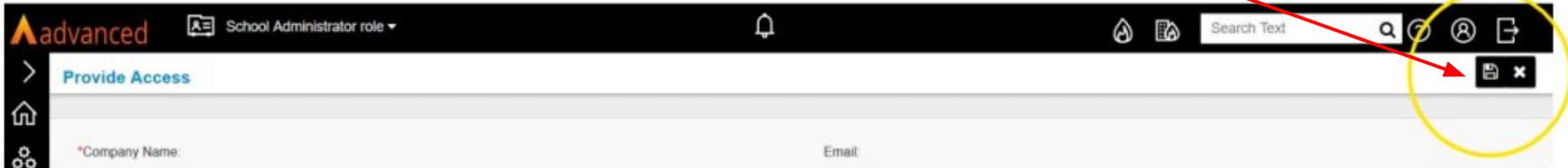
Section 2: Important rules for exporting student applications

1. We use the First Name and Last Name to find existing contacts so they can be matched during export. If the returned contact has the same postcode they will be pre-selected in the list of contacts displayed.

2. We don't change addresses for on-roll students and existing contacts.

3. We can only add 1 email address to a student or a contact.

Section 3: Which fields are imported for students - *name, birthday, gender and home address*

Property Name	File Comment	How this processed	Cloud School Import
Legal Surname	60 characters max, 1 character min	Existing data replaced with new data from A+	Yes
Legal Forename	60 characters max, 1 character min	Existing data replaced with new data from A+	Yes
Preferred Surname	60 characters max, Default to Surname if missing or null	Existing data replaced with new data from A+	Yes
Preferred Forename	60 characters max, Default to Forename if missing or null	Existing data replaced with new data from A+	Yes
Former Surname	60 characters max, 1 character min	Existing data replaced with new data from A+	Yes
Middle Name	60 characters max, 1 character min	Existing data replaced with new data from A+	Yes
Birthday	YYYY-MM-DD	Existing data replaced with new data from A+	Yes
Gender	Either M or F	Existing data replaced with new data from A+	Yes
Flat name and or number		Addresses are only imported for new external students. The API does not support updating data (including addresses) for internal on-roll students	Yes
House name or number		Same as above	Yes
Street		Same as above	Yes
Town/City		Same as above	Yes
County		Same as above	Yes
PostCode		Same as above	Yes

Section 3: Which fields are imported for students - *phone, email, ethnicity, nationality, language, religion, service child, dietary and medical info*

Property Name	File Comment	How this processed	Cloud School Import
All Telephones	20 characters max	Existing data for students in pre-admissions is replaced with new data from A+	Yes
Email Address	60 characters max	Same as above	Yes
Ethnicity	Lookup	Same as above	Yes
Ethnicity Source	Lookup	Same as above	Yes
Nationality	Lookup	Same as above	Yes
Home Language	Lookup	Same as above	Yes
First Language	Lookup	Same as above	Yes
Religion	Lookup	Same as above	Yes
Religion Source	Lookup	Same as above	Yes
Service Child	Lookup	Same as above	Yes
Service Child Source	Lookup	Same as above	Yes
Dietary Needs	Can be Multiple needs. Lookup	Existing dietary needs in Cloud School are removed and new ones are added from A+	Yes
Medical Conditions	Can be Multiple conditions. Lookup	Existing medical conditions in Cloud School are removed and new ones are added from A+	Yes

Section 3: Which fields are imported for students - *SEN, GP details, mode of travel, UPN and Learner Code / Id*

Property Name	File Comment	How this processed	Cloud School Import
Do you have a SEN?	Can be Multiple conditions. Lookup	Existing SEN needs in Cloud School are removed and news ones are added from A+	Yes
What type of SEN?	Can be Multiple conditions. Lookup	Existing SEN needs in Cloud School are removed and news ones are added from A+	Yes
Agency Name			No
Agency House Number			No
Agency Street Description			No
Agency Town			No
Agency Postcode			No
Mode of Travel		Existing data replaced with new data from A+	Yes
UPN		Existing data replaced with new data from A+	Yes
ULN		Existing data replaced with new data from A+	Yes
Application Notes			Yes
Learner Code			Yes
Learner Id			Yes

Section 3: Which fields are imported for contacts - *name, gender, parental responsibility and priority*

Property Name	File Comment	How this processed	Cloud School Import
Title	Uses the Cloud School list of options (look-ups) for this property	Added for new contacts only. Update existing contacts available.	Yes
Relationship	Uses the Cloud School list of options (look-ups) for this property	Existing data replaced with new data from A+	Yes
Legal Surname	60 characters max, 1 character min	Added for new contacts only. Update existing contacts not available.	Yes
Middle Name	60 characters max, 1 character min	Same as above	Yes
Legal Forename	60 characters max, 1 character min	Same as above	Yes
Gender	Either M or F	Same as above	Yes
Parental Responsibility	'T' for True or 'F' for False Legal parental responsibility	Existing data replaced with new data from A+	Yes
Contact Priority	1 – 10 This is the order of priority of a parent in terms of the school contacting home of the student	Existing data replaced with new data from A+	Yes
Emergency Level			Yes
Next of Kin			Yes

Section 3: Which fields are imported for contacts - *phone, email and home address*

Property Name	File Comment	How this processed	Cloud School Import
Contact ID	For new contacts this is generated on when the contacts is created and then saved on Cloud School and A+. If a contact on A+ is mapped to an existing contact in Cloud School, the Contact ID in Cloud School is saved to A+		Yes
Telephones	20 characters max	Added as new number, if the same number is already present then if is not added again	Yes
Mobile Telephone	20 characters max	Same as above	Yes
Work Telephone	20 characters max	Same as above	Yes
Home Email	60 characters max	Same as above	Yes
Flat		For new contacts addresses are imported. For existing contacts addresses are only imported if the existing contact does not already have an address in Cloud School	Yes
Number		Same as above	Yes
Street Description		Same as above	Yes
Town		Same as above	Yes
Postcode		Same as above	Yes
Country		Same as above	Yes
Same Address			Yes

Section 3: Which fields are imported for school - *LA / school number, name, entry / leaving date and reason*

Property Name	File Comment	How this processed	Cloud School Import
LA Number			Yes
School Number			Yes
School Name			Yes
Entry Date			Yes
Leaving Date			Yes
Leaving Reason			Yes

Section 3: Which additional fields are imported for learner - *traveller, county of birth and proficiency*

Property Name	File Comment	How this processed	Cloud School Import
Traveller			Yes
Traveller Name			Yes
Traveller Source			Yes
Country of Birth			Yes
Proficiency			Yes
Assessed Date			Yes

Section 3: Which other fields are imported for learner health - *learning difficulties, disability, allergy, food pref and dietary notes*

Property Name	File Comment	How this processed	Cloud School Import
Learning Difficulties			No
Disability			Yes
Allergy			Yes
Food Preference			Yes
Dietary Notes			Yes

Section 3: Which fields are imported for learner - *photo*

Property Name	File Comment	How this processed	Cloud School Import
Photo Data			Yes

UDFS and Teaching Groups are also imported

Property Name	File Comment	How this processed	Cloud School Import
User Defined Fields (UDFs)		Existing data replaced with new data from A+	Yes
Teaching Groups (timetable classes)		Existing data replaced with new data from A+	Yes

Section 4: Cloud School MIS Admissions+ Export
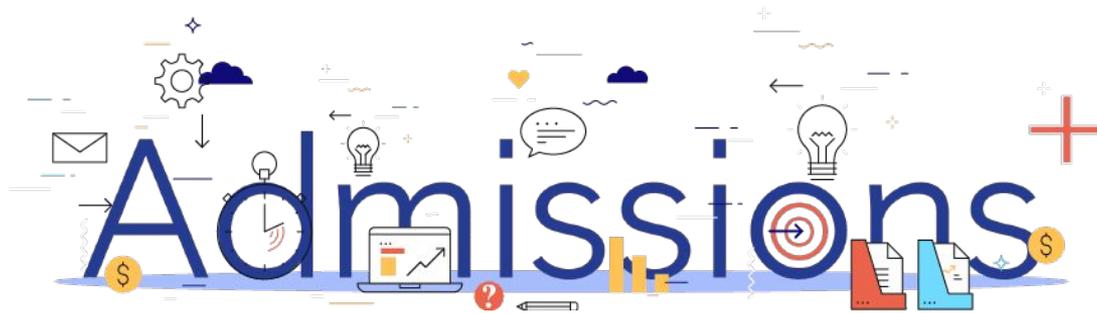
Step 1: **Enrolling students to be exported**

1. When your students are ready to be exported to your MIS they should be enrolled in Admissions+.
2. For Year 7 students this can be done within the Student Profile or in bulk:
   Student Profile method
   Bulk Student Selection method

3. For Sixth Form students when they are put on their Courses their enrolment status will change to Enrolled.
4. The **Student Profile** and **Bulk Student Selection** methods can also be used to enrol Sixth Form students.

Step 2: **Exporting students to Cloud School MIS**

1. Log into Admissions+.

2. Navigate to **Data → Export**.

3. Click on **Start an Export** at the top-right.

4. **Give you export a name** then select **Progresso** (Cloud School) and click on **Next**.
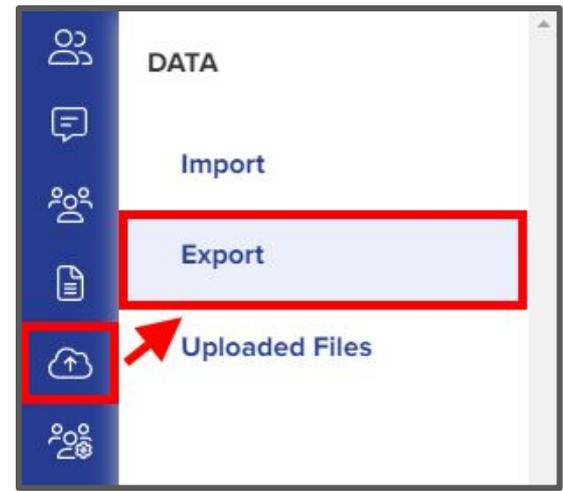
DATA

Import

Export

Uploaded Files

Start an Export

Export Data

← Back

| Where to export | What to export | Field selection & configuration | Select Students | Export Summary | Next → |

Give your export a name

Student export

Where do you want to download the data?

An Excel .CSV File	My School MIS	A Zipped Folder
CSV XML	Progresso	ZIP
○	●	○
Export student and parental contact data from the system to an Excel spreadsheet	Export student and parental contact data from the system to your School MIS	Export student photos and documents to a Zipped File

1. On the next step select **Students** then click **Next**.

2. On the next screen you need to:
    Select **Academic Year** e.g. 2021/2022
    Select **NCYear** e.g. 7
    Select **Course Code** e.g. KS3
    Select **Student Status** e.g. Draft (PreAdmissions)
    Enter the **Date of Entry** e,g, 01/09/2021

3. The mappings should be correct then click **Next**.

Export Data

← Back

Where to export · What to export · Data Mapping · Select Student · Next →

What would you like to export?

User Defined Fields	Students	Student Classes
	Data collected on forms. This includes data of their contacts.	Classes students have been enrolled into. Saving this to your MIS generates student timetables
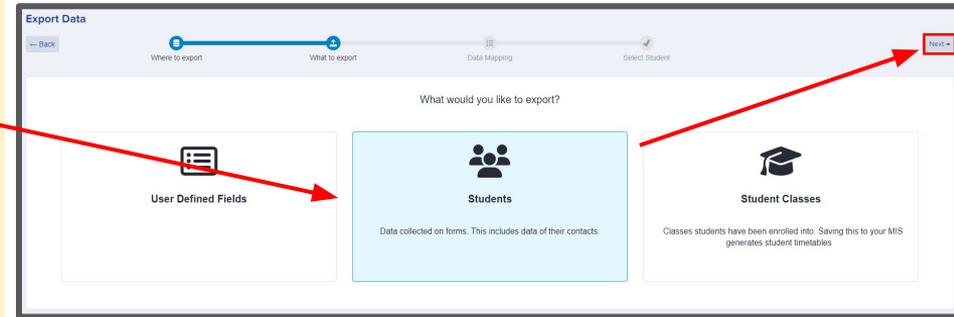
Next →

SELECT PROGRESSO ACADEMIC YEAR, COURSE CODE, YEAR

Select academic year × ⇕   Select NCYear × ⇕   Select Course Code × ⇕   Select Student Status × ⇕   Date of Entry dd/mm/yyyy

Other Options

☐ Contact Priority is sequential

☐ Export Parental Portal for Parent

Step 2: **Exporting students to Cloud School MIS**

1. On the next step you may use the **Advanced Filters** and then **'Select all'** students for your export if required or you can select only students you want to export.

2. Click **Next**.

Next →

Advanced Filters ⌄

Status ⌄
Properties ❯
Application Form Response ❯
Reference Form ❯
Exam Result ❯
Average Point Score ❯
Number Of Qualifications ❯
Additional Columns ❯

Student Type
- ☐ Internal
- ☐ External

Application Status
- ☐ Incomplete
- ☐ Awaiting Reference
- ☐ Completed
- ☐ Declined
- ☐ Withdrawn
- ☐ Deadline Missed

Enrolment Status
- ☐ Pending
- ☐ Details To Be Checked
- ☐ Ready To Enrol
- ☐ Enrolled

Enrolment Sub-Status
- ☐ Enrolment Waiting
- ☐ Enrolment
- ☐ Declined

Offer Status
- ☐ No Offer
- ☐ Offer Made
- ☐ Accepted By Student
- ☐ Declined By Student
- ☐ Offer Withdrawn

Interview Status
- ☐ Pending
- ☐ Complete
- ☐ Accepted
- ☐ Denied

Tag

Application Forms
- ☐ All Application Forms

Filter   Save Filter

Select Students

Column visibility   Export   **Select all**   Deselect all

Showing 1 to 7 of 7 entries   7 rows selected   Show 10 ⬍ entries   Search:

#	Id	Student Code	progresso ID	First Name	Last Name	Email	Birthday	
1	857	U-D4A1		Georgina	Hurrie	georgina.hurrie@admp.uk	17/04/2002	☑
2	859	U-E926		Jordan	Ramazinski	jordan.ramazinski@admp.uk	15/04/2002	☑
3	853	U-B15C		Kevin	Connor	kevin.connor@admp.uk	09/01/2002	☑
4	21	KBQX		Kurt	Wagner	oanh+student4@applicaa.com	19/02/2007	☑

Step 2: **Exporting students to Cloud School MIS**

1. On the Progresso Student Mismatch Checking step potential mismatched students will be displayed if they are different in your MIS.
*Click on **Resolve** for each student in the **Unresolved Matches** list.*

Progresso 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	Progresso Students	Resolution	Actions
Kurt Wagner ⤢	Kurt Wagner	Not resolved	✎ Resolve

Resolve Potential Mismatch ✕

Fields	Admissions Student	Progresso student
Name	Kurt Wagner ⤢	Kurt Wagner
Student ID	21	cloud8008
Gender	M	M
DOB	20/02/2007	19-02-2007
Email	oanh+student4@applicaa.com	
Address		
Contact 1	Parent 1 Parent 1 ⤢	Parent 1 Parent 1

Select resolution:

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

Confirm & Next

2. Select the **Ignore difference and continue exporting** option to confirm they are a match.

3. Select the **These are not the same person, unlink them** to confirm they are **not** a match.

4. Click **Confirm & Next** which will show the next student.

Step 2: **Exporting students to Cloud School MIS**

1. Once you have selected an appropriate option for your student(s) they will appear in **Resolved Matches**
   *Click on **Change** to select a different option if required.*

Progresso 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 0   **Resolved Matches** 1

Admissions Student	Progresso Students	Resolution	Resolved on	Resolved by	Change resolution
Kurt Wagner	Kurt Wagner	Cloud8008	16 Feb 2023, 11:43	Andy Applicaa Support	Change

Go to Student Matching ➜

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

Please note: If there are too many mismatched students you will need to contact Support or your Customer Success Manager, when this happens the message below will be displayed and you will not be able to continue with the export.

Progresso Student Mismatch Checking

ⓘ **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 was originally in your MIS.
This appears to be the case with 14 records in this import... To prevent the possibility of corrupting the data in your MIS,
we need you to contact technical support and/or your CSM, and they will be able to assist you in importing this data.

Raise a Support ticket

1. In the Arbor Student Mapping screen you will need to **Resolve** any **Unresolved Matches.**

Progresso Student Mapping

(i) What should I do with matching students?

⚠ **Potential duplicates detected!**
We have detected that **12 students** you are exporting may already exist in Progresso. 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 3 minutes to check.

Unresolved Matches 1   Resolved Matches 11

Admissions+ Students	Progresso Students	Matching Score	Resolution	Actions
Zztimmy Zztestington-Fryer-Sampsonanddelilah 🔗	Zztimmy Zztestington-Fryer-Sampsonanddelilah	▰▰▰▰	Not resolved	✏ Resolve

Resolve Suspected Duplicates   ✕

Select Resolution

Fields	Admissions Student	Merge to Progresso student #1 ⓘ ○	Export as new student ○	Skip this student ○
Name	Zztimmy Zztestington-Fryer-Sampsonanddelilah 🔗	Zztimmy Zztestington-Fryer-Sampsonand... 🔗		
Student ID	2117	966		
Gender	FEMALE	FEMALE		
DOB	31/01/2006	31/01/2006		
Telephone 1	+447727840999			
Telephone 2	+447727840969			
Email	jeff.clark6@applicaa.com	jeff.clark6@applicaa.com jeff.clark1@applicaa.com		
UPN				
ARN	823-2019-08-E-002117			
Address	17 Westwood Houses 45 Old Devonshire Road Londonnn ,SW16 9RF	26 Westwood House, 47 Old Devonshire Road, SW12 9RF		
School	Updated Clark Updated 🔗	Terry Updated Clark Updated 🔗		

Export Admissions+ student as a new Progresso student.
This keeps information from both Admissions+ student and Progresso student as separate records.

Skip this student for now and decide later.

11 / 12 Resolved   **Confirm & Next**

2. Select the **Merge to Progresso student** option to merge them with the selected student, there maybe more than one student displayed to select.

3. Select the **Export as new student** option to export them as a new Arbor student.

4. Select the **Skip this student** option to not export them.

5. Click **Confirm & Next** which will show the next student**.**

6. Click on **Next.**

Next →

1. On the Contact Mapping step contacts will be pre-selected if they match.
   Select New Contact if they are not an existing contact in your MIS or Skip Contact if they should not be synced.
   Contacts are matched using the following rules:
   1. The system looks through existing Cloud School contacts, and finds any one with an exact match for the First Name and Last Name as the person on Admissions+
   2. Matching people are listed as 'Potential Matches'

2. Click **Next**.

Matched to an existing contact - links the A+ and Cloud School contact, saves the Cloud School Contact Id to Admissions+ and updates the available data from A+ to the Cloud School contacts (see the data table for import rules)
New Contact - creates a new person in Cloud School
Skip Contact - does nothing, the contact is not imported

1. Once the export process has finished click on the report to check your students exported successfully.

2. If there were any issues with the export you will see the reason in the **Export Status** column for each student.
In the example below all students and contacts were exported successfully.

Export Finished!

1 students were processed!

Click to view report

↑↓	#	Export Status ↑↓	Progresso LearnerId ↑↓	ULN ↑↓	UPN ↑↓	Notes ↑↓	Gender ↑↓	Surname ↑↓	Forename ↑↓	Religion ↑↓	Ethnicity ↑↓	MajorNeedDescription ↑↓	MiddleName ↑↓	SenProvision ↑↓	DateOfBirth ↑↓	↑↓
⊕	1	Saved successfully	4925				M	Test Anika Preferred Surname	Test Anika Preferred Forename	UR	COCH	["SPLD", "HI", "MSI"]	Test Anika Middle Name	N	2009-06-04	

Showing 1 to 1 of 1 entries

Previous **1** Next

Column visibility   Export   **Select all**   Deselect all

Showing 1 to 2 of 2 entries   Show 10 ⬍ entries   Search: _____

↑↓	#	Export Status ↑↓	Progresso ContactId ↑↓	Email ↑↓	Title ↑↓	Gender ↑↓	Surname ↑↓	Forename ↑↓	Priority ↑↓	NextOfKin ↑↓	MiddleName ↑↓	
⊕	1	Saved successfully New telephones added: Mobile: 07777666444 Home: 01777888666	6641	parent0af6147abd14983a@applicaa.com	Mr	M	Stamm0af6147abd14983a	Adriana0af6147abd14983a	1	true		☐
⊕	1	Saved successfully New telephones added: Mobile: 07777666555 Home: 01777888999	6639	jrtest1234@applicaa.com	Mr	M	Ranger	Jones	2	false		☐

Step 3: **Export Report**

1. More exported data can be displayed by clicking on the '+' icon for each student to see their data.

↑↓	#	Export Status ↑↓	Progresso LearnerId ↑↓	ULN ↑↓	UPN ↑↓	Notes ↑↓	Gender ↑↓	Surname ↑↓	Forename ↑↓
⊖	1	Saved successfully	4925				M	Test Anika Preferred Surname	Test Anika Preferred Forename

EmailAddress

LegalSurname Test Ledner

ModeOfTravel OTH

Telephones []

ServiceChild N

FormerSurname

LegalForename Test Anika

Flat

Town   LONDON
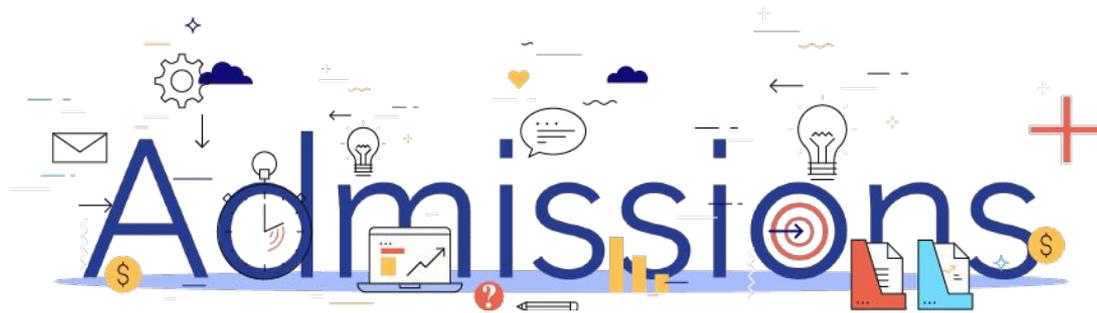
County   London
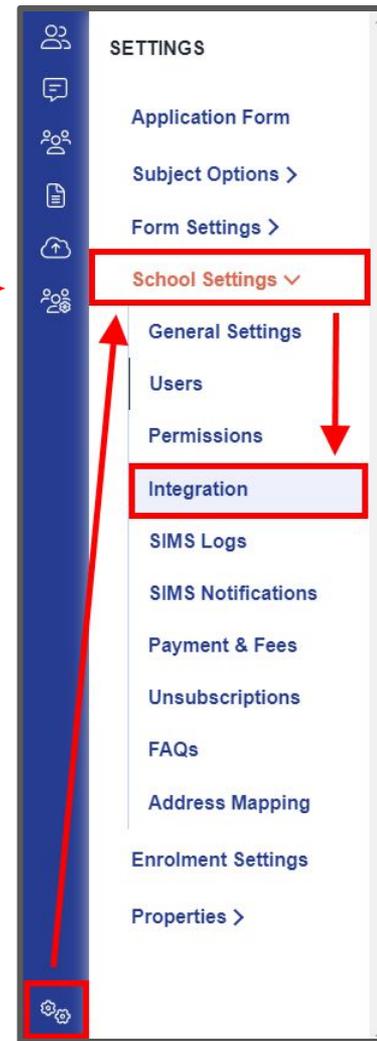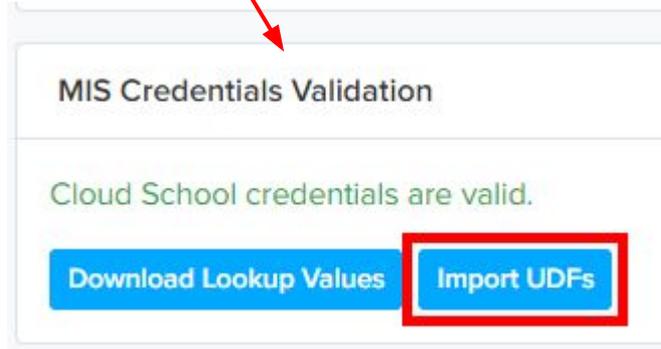
Number   1a

Street   Wimbledon Station

**Section 5: Cloud School MIS Admissions+ Export of UDF's**

Step 1: **Importing UDFs**

1. Log into Admissions+.

2. Navigate to **Settings → School Settings → Integration**

3. Click **Import UDFs.**

MIS Credentials Validation

Cloud School credentials are valid.

Download Lookup Values   **Import UDFs**

SETTINGS

Application Form

Subject Options >

Form Settings >

School Settings ∨

General Settings

Users

Permissions

Integration

SIMS Logs

SIMS Notifications

Payment & Fees

Unsubscriptions

FAQs

Address Mapping

Enrolment Settings

Properties >

Step 2: **Adding Cloud School UDFs to your form**

SETTINGS

Application Form

Subject Options >

Form Settings >

School Settings >

Enrolment Settings

Properties >

1. Navigate to **Settings → Application Form.**

2. Click on the **name** or **Pen** icon to edit the Step as shown in the example below.
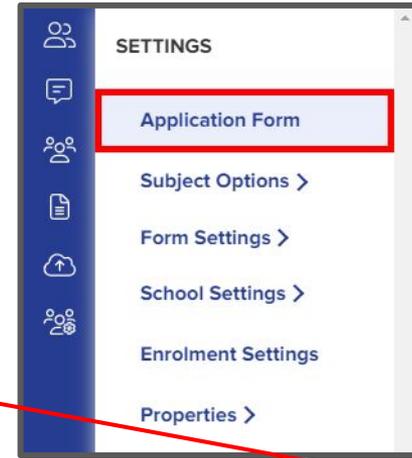
Step 3: Child's Welfare and Support Information ✎

+ New

3. Click on **Add New** button to edit the Section and add your **UDFs.**

CloudSchool User Defined Fields ∨

Default Test +

DC_Text +

Master Data Staff +

Seeds +

4. Expand the **CloudSchool User Defined Fields** property group to select **UDFs** to add to your form. *If UDFs are grayed out and unselectable this is because they have already been added to your form.*

Add New Field

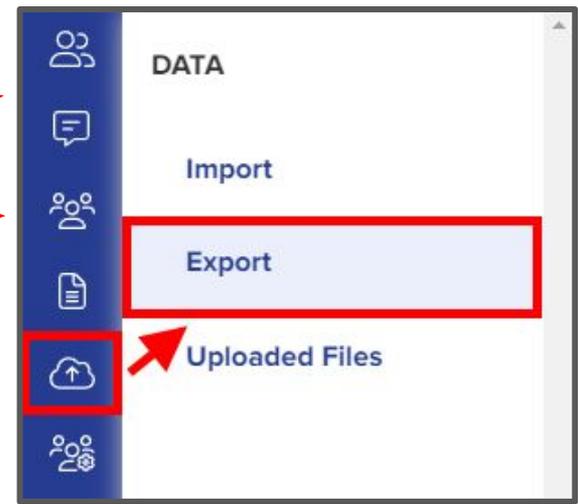5. **UDFs** can also be displayed by typing in the **Search existing fields** box.
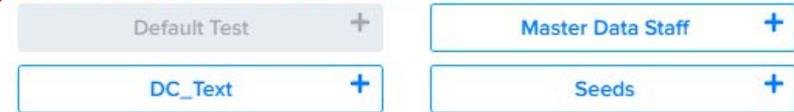
Existing Properties

udf

Step 3: **Exporting UDFs**

1. Navigate to **Data → Export.**

2. Click **Start an Export**.

3. **Give your export a name** and select **Progresso** (Cloud School)**.**

4. Click **Next**.

DATA

Import

Export

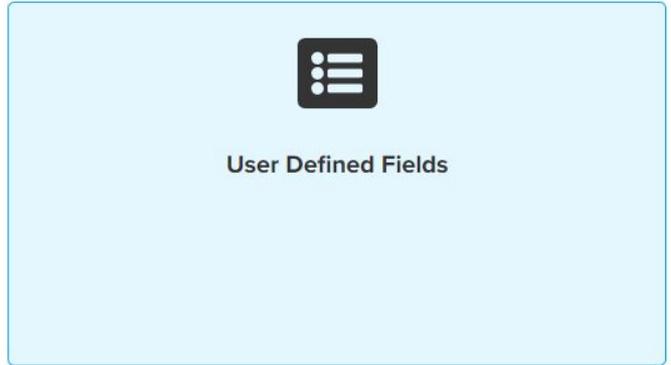Uploaded Files

Start an Export

Give your export a name

UDF export

Next →

Where do you want to download the data?

My School MIS

Progresso

Step 3: **Exporting UDFs**

1. Select **User defined fields**.

User Defined Fields

2. Click **Next** to go to the **Map** step**.** *The Mapping below shows examples of User Defined Fields that have been automatically mapped to the correct fields in the form.*

Next →

3. Click **Next.**
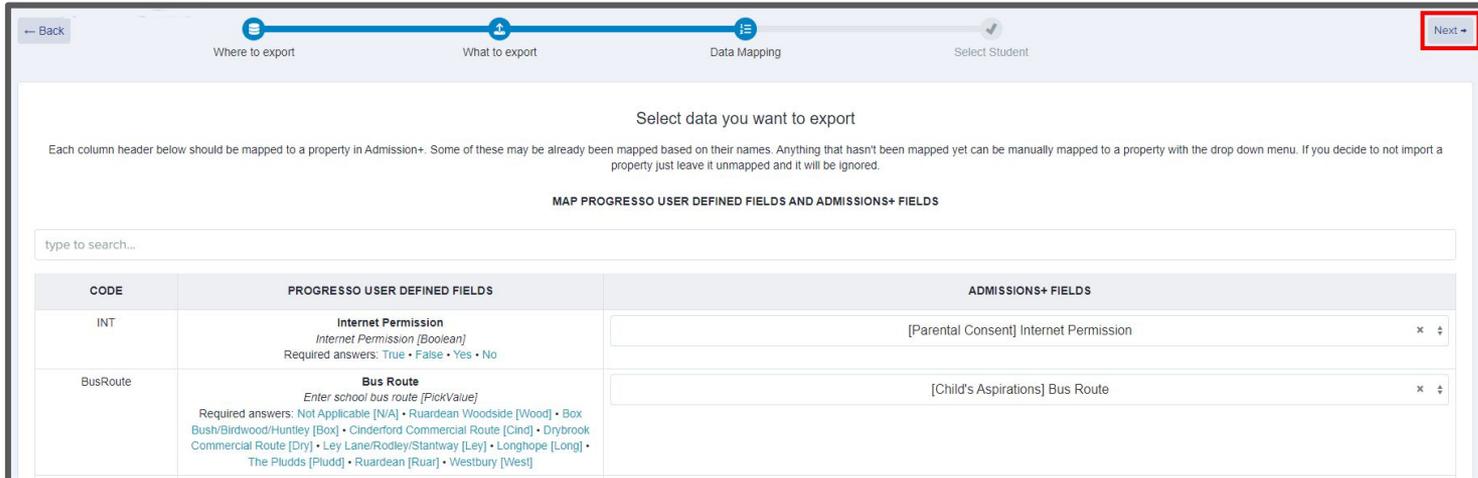
← Back | Where to export | What to export | Data Mapping | Select Student | Next →

Select data you want to export

Each column header below should be mapped to a property in Admission+. 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.

MAP PROGRESSO USER DEFINED FIELDS AND ADMISSIONS+ FIELDS

type to search...

CODE	PROGRESSO USER DEFINED FIELDS	ADMISSIONS+ FIELDS
INT	**Internet Permission** *Internet Permission [Boolean]* Required answers: True • False • Yes • No	[Parental Consent] Internet Permission × ↕
BusRoute	**Bus Route** *Enter school bus route [PickValue]* Required answers: Not Applicable [N/A] • Ruardean Woodside [Wood] • Box Bush/Birdwood/Huntley [Box] • Cinderford Commercial Route [Cind] • Drybrook Commercial Route [Dry] • Ley Lane/Rodley/Stantway [Ley] • Longhope [Long] • The Pludds [Pludd] • Ruardean [Ruar] • Westbury [West]	[Child's Aspirations] Bus Route × ↕

Step 3: **Exporting UDFs**

1. Click on **Select all** or select one or more students as required to export **UDFs** for them**.**

2. Click **Next** to start the export.

Step 4: **Export Report**

1. Once the export process has finished click on the report to check UDFs have exported.

Export Finished!

Click to view report