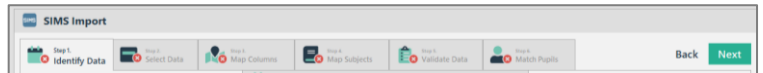


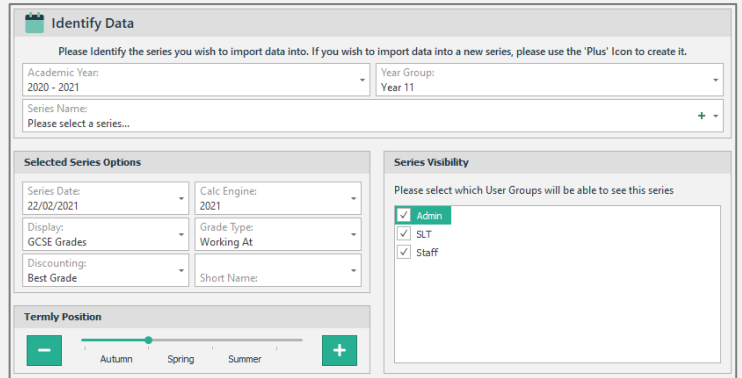
### 4Matrix 3.9.8.0: Use this guide to import student details

Select the **Admin** tab and go to **MIS > SIMS**.



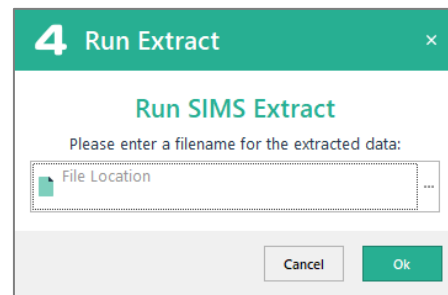
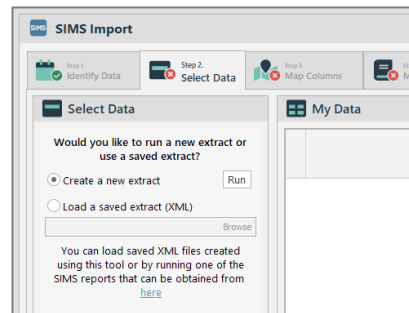
#### Step 1: Identify Data (No Change)

- 1) Select the academic year and year group.
- 2) Create a new series by clicking on +, or an existing series by clicking on the drop-down arrow. If a new series is selected there are a set of pre-defined series names that can be selected, or set a custom name by selecting Other.
- 3) Adjust any Series Options as required.
- 4) Set the Series Visibility – which user groups will have access to the series.
- 3) Click on Next.

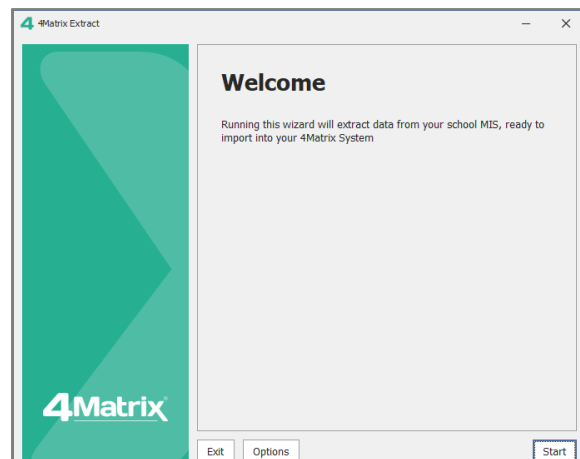


#### Step 2: Select Data (No Change)

- 1) Select Create a New Extract.
- 2) Click on Run.
- 3) In the pop-up, click on the ellipses (...)
- 4) Select a location to save a copy of the extract file and enter a filename e.g. *Year 11 25.05.2020*.
- 5) Click on Run Extract.

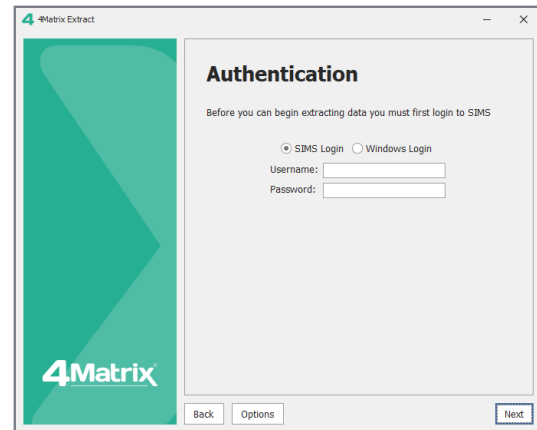


- 6) In the data extract tool, click on Start.



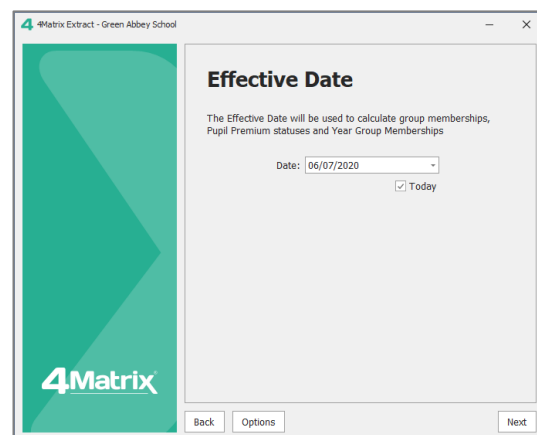
### Step 2: Select Data (No Change) cont./

7) Select SIMS Login or Windows Login and enter credentials.



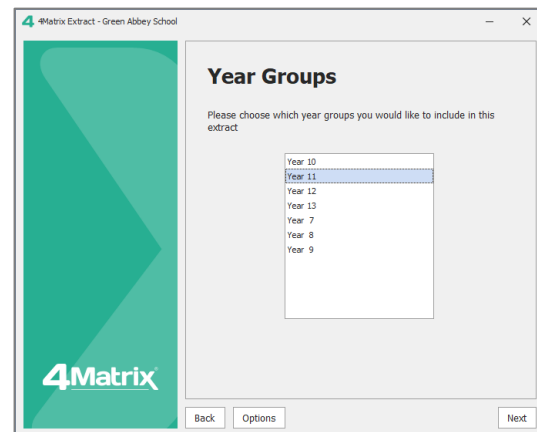
8) The Effective Date will import the students on roll and class memberships based on the date selected for the academic year and cohort year group identified in Step 1.

9) Click on Next.



10) Select the appropriate Year Group.

11) Click on Next.

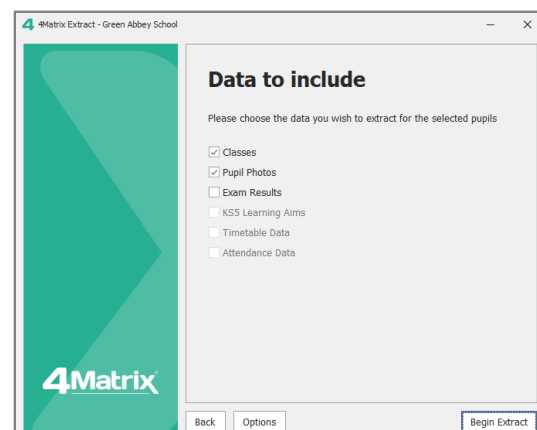


12) Select Classes and Pupil Photos for the import.

13) Click on Begin Extract.

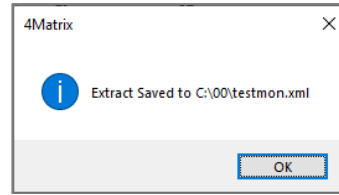
14) Once the extract has completed a confirmation message will appear.

15) Click on Finish.



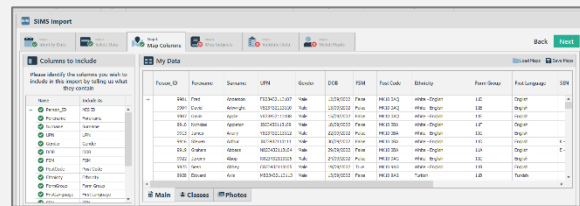
### Step 2: Select Data (No Change) cont./

- The saved copy filename will be confirmed (this file can be used to re-import in future if required).
- The extracted data is now shown in the import wizard – as a preview only.
- Click Next.



### Step 3: Map Columns \*NEW\*

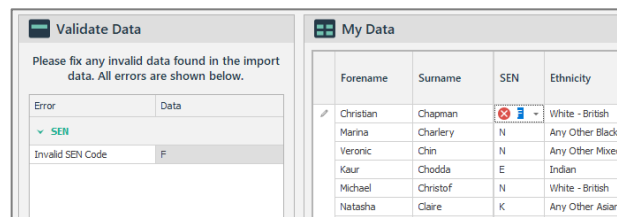
- The pupil data columns, classes and photos will map automatically, showing a green tick in each of the rows on the left (in the Columns to Include panel)



*Note that Step 4: Map Subjects is skipped because no subject data is being imported.*

### Step 4: Validate data \*Updated\*

- If there are no red crosses, select Next to skip this step.
- Identify columns with red crosses – this means there is an unrecognised value(s) in that column.
- Review the data entries that do not match.
- It is not possible to proceed until all red crosses are corrected.



### Step 5: Match Data \*Updated\*

- The first time you are importing student records into 4Matrix, this step will not appear, and the import will be completed.
- If you have imported the cohort before, identify any students with red crosses.
- If the student is new to the school/4Matrix, right click and select Mark as New Pupil or All un-Matched Pupils or use the corresponding options on the left.
- If there is an incorrect match, use the panel on the left to match the correct pupil records (please contact support if help is required).
- It is not possible to proceed until all red crosses are corrected.
- Click on Finish.

