

SAM Learning Data Exporter Setup Guide

for SIMS.net 7.105 (or above)

What is the SAM Learning Data Exporter?

This application makes importing and updating your student data on SAM Learning simple, fast, secure and hassle-free. It runs silently in the background, periodically checking with our server to see whether or not it needs to send new data.

We schedule our server to request new data on Friday afternoons. However, if required, we can run it for your school only on your request.

The data that is exported is defined within a standard SIMS report definition file; this is downloaded on the Report section of installation. You can run this report within SIMS to see exactly what data is being exported (although a number of fields such as Free School Meals can be opted out of during installation).

Installation

TIP: It's recommended to install the application on the SIMS server using an administrator account.

1. Run the **SAM Learning Data Exporter Setup.msi** file included with this guide and follow the installation wizard.

Once installed, select the checkbox **Launch the program** and **Finish**, or you can open the application from the Start Menu: **SAM Learning > SAM Learning Data Exporter**.

2. Enter your SIMS username and password and click **Test**. If your credentials are correct, you will see the **Login succeeded** notification. Click **OK** to proceed to the Windows tab.

TIP: The SIMS user should have at least the following permissions: Class Teacher access, System Manager and SIMS Personnel Assistant Role



The screenshot shows the 'SIMS' tab of the 'SAM Learning Data Exporter v1.9.2' application. A yellow instruction box at the top reads: 'Please enter a SIMS user name and password that the extractor can use to access SIMS, and click the Test button to proceed.' Below this, there are two text input fields: 'SIMS username' and 'SIMS password'. A 'Test' button with a question mark icon is located at the bottom right of the window.

3. The Service will run from the user you enter on the Windows tab. For best results, we strongly recommend being logged into Windows as the **administrator** and entering the administrator's details here. Click **Test** to proceed to the Web tab.



The screenshot shows the 'Windows' tab of the 'SAM Learning Data Exporter v1.9.2' application. A yellow instruction box at the top reads: 'Enter the username and password of either your Windows administrator or the user you are installing the application from. Dedicated Service accounts are not'. Below this, there are two text input fields: 'Windows username' and 'Windows password'. A 'Test' button with a question mark icon is located at the bottom right of the window.

4. In most cases, you can leave the proxy settings set to 'Use Existing proxy settings from IE'. However, if this doesn't work, enter the **IP address** and **Port** of your proxy e.g. 123.456.789.111:80 and optionally a **username**, **password** and **domain name**.

TIP: Some schools receive 'Invalid URI' at this stage. If you do, try adding `http://` or `https://` to the beginning of the IP address.

Next, enter your SAM Learning **admin credentials**. If you're having trouble remembering them, contact us at support@samlearning.com or call **0845 130 4160**.

Finally, click **Test** to check the connection to our servers. Click **OK** to proceed to the Report tab.

SAM Learning Data Exporter v1.9.2

SIMS Windows Web Report Service

Please enter your proxy details, your SAM Learning account details and click the Test button to proceed.

Use existing proxy settings from IE

Use custom proxy settings

Proxy name and port: DEFAULT

Proxy username: []

Proxy password: []

Proxy domain: []

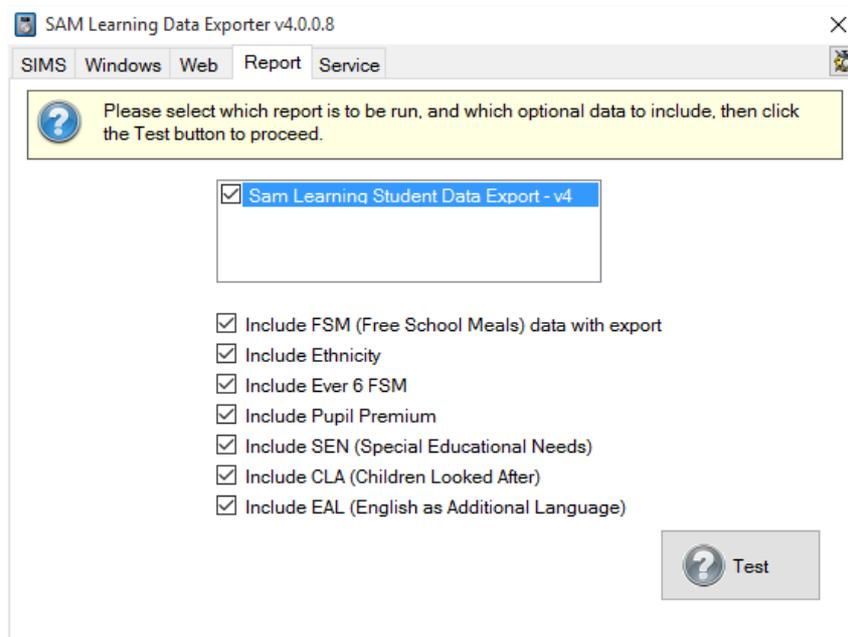
SAM School Centre ID: []

SAM Admin User ID: []

SAM Admin Password: []

Test

5. The application will check your SIMS system for the latest **Sam Learning Student Data Export** report and import it if not available. If you would like to check the data being exported you can run the report manually within SIMS.

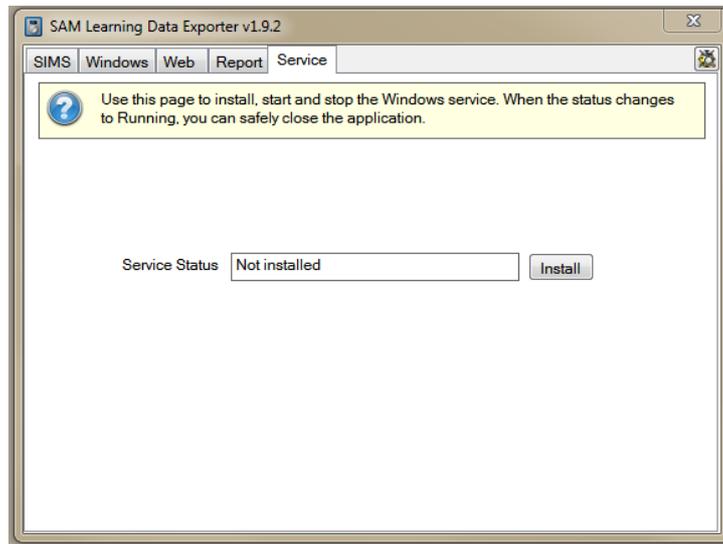


6. Select whether to include any optional fields within the export.

Note: By unselecting these fields your school will be unable to get reports on these student groups.

Click **Test** to check that the report is present in your SIMS system. Click **OK** to proceed to the Service tab.

7. Click **Install**. You will then receive the **Service installation complete** message. Click **OK** and check that the **Service Status** now reports the status as **Running**.



That's it! You can close the application and the Service will continue to run silently in the background.

Your student data will be updated on Friday afternoons. If you would prefer for it to be on request only, please email our support team and ask to be removed from the scheduled SIMS refresh, quoting your school's **Centre ID**.

If you experience any problems and need help with the installation, contact us at support@samlearning.com or call **0845 130 4160**.

FAQs

1. Is the exporter secure?

Yes. The data is sent over SSL (https), the same level of security that online banks use.

2. What data does SAM Learning get access to?

The data that is exported is defined within a standard SIMS report definition file which is imported during installation. You can run this report within SIMS to see exactly what data is being exported (Ethnicity, FSM, Ever FSM 6, Pupil Premium, SEN and CLA data can be opted out of during installation).

3. Will I receive an email notification after the data has been updated?

No. We will only email you if there's been a problem receiving your student data.