

Academic Year End

The academic year end process should be relatively straightforward if you have the automatic SIMS link running. (If not, see section 1 – otherwise go to section 2)

1. Setting up the Sims autolink in PFM for pupil record daily/weekly/monthly synchronisation

This feature automatically updates PFM with student information from Sims on a daily, weekly or monthly basis.

Private Funds Manager needs to extract certain bits of information from Sims, and add it into PFM in a format PFM can recognise.

If you currently do this manually, then the process is to open Sims, run a specific report, save the contents of that report, and then import the report into PFM.

The autolink does the same 4 steps, just in the background without your intervention.

How to set it up -

a) LOAD the files into Sims.net

You may need to ask Istek to email the Sims reports – they are called PFM2015 (for legal names on roll) PFM2015 familiar (for familiar names on roll) PFM2015Pre (pre admissions) and PFM2015FamiliarPre (Familiar names, pre admissions) Download from the email and SAVE (don't try to RUN) into a folder of your choice.

Go into Sims and up to REPORTS – IMPORT. Click on OPEN and browse to your chosen folder, then choose each one in turn – clicking on OK and then IMPORT at the bottom.

b) Setup the link In PFM

Go to FILE - Sims.net Auto Link

Now, click on browse, and browse to your LOCAL SIMS.net folder. Click on the file called PULSAR – OPEN. *If you are not sure which folder to choose, go to your desktop, locate the Sims.net icon, right click and go down to Properties - this will tell you the folder needed - 99% of the time it is C:\Program Files\Sims\Sims.net*

Enter your SIMS.net username and password.

Tick to remember password

Choose if you want Legal or Familiar name imported.

Tick how often to update

Tick the pink box to indicate you have already loaded the Sims reports.

Click on Save and Close.

Now test it – back into FILE - Sims.net Auto Link

Click on UPDATE NOW to test the link.

2. New academic year

At the start of the new academic year, your new students and new classes should automatically be updated. HOWEVER, you might not want to wait a few days (if doing weekly) or longer for this to happen, so once you know that SIMS has been promoted do the following:

- a. Check that no one has been entered onto PFM manually using the SETUP tab, without an admission number being added. Go to SETUP – click on STUDENT WITHOUT AN ADMISSION NUMBER. If there are any showing, close the report, find the admission numbers on SIMS then use VIEW/AMEND/ADD STUDENTS button to enter their admission numbers.
- b. Once you are sure there are no students without an admission number, go into PFM – FILE – SIMS.net autolink – click on UPDATE NOW

3. Delete Leavers

Leavers are never just removed from PFM (in case they own money / are due a refund etc)

You have to manually say YES to delete the leavers. Do this when you are ready, and happy that no further financial transactions will occur with these pupils.

In PFM – SETUP tab – click on CLEAN OUT at the very bottom. CHECK THE LIST!!!!!! Scroll right to the end – anyone you DO NOT want to delete, simply UNTICK. This could include teachers, shop users etc.

You can look at just one class at a time using the selection arrow in the top right corner.

IF you are ABSOLUTELY SURE you want to, click on Delete Ticked. Repeat for the rest of the classes with leavers.