

## Preparation Instructions for MIS app

Thank you for requesting the latest addition to your Fund Manager, our MISapp feature.

MISapp will automatically update Fund Manager by running a request for updated details of your pupils and importing them. The following fields will be imported:

**Data that MISapp will import**

UPN: ☒

Contacts: ☒

Groups: ☒

Staff: ☒

Attendance: ☒

If you would prefer **not** to have the Staff and Groups fields imported, please advise us when you contact us for your \*Organisation code.

## SIMS.NET preparation

You **MUST** have completed the preparation stages **BEFORE** you install MIS app.

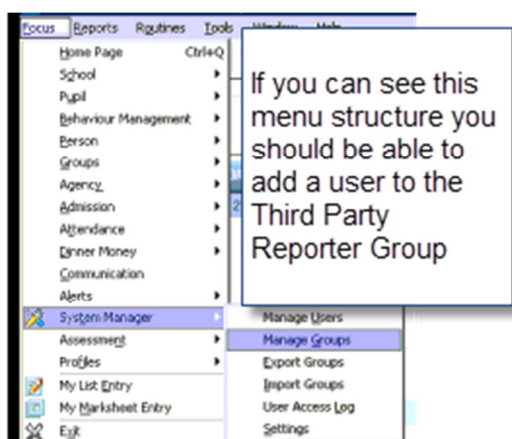
This preparation document will take you through the stages to ensure you have the correct permissions and access to sims.net, which is a requirement before you install the MIS app.

You **MUST** be a member of the Third Party Reporter Group in order to use MIS app.

To check if you are a member use the :-

\*Focus>System Manager>Manage Groups menu option. In the Description field enter Third Party Reporting

This will reveal the members of the group. If you do not appear as a member of this group please contact your System Manager and ask to be added.



Note, if you are unable to see the Focus>System Manager menu it is highly likely that you are **NOT** a member of the Third Party Reporter Group, please contact your System Manager for assistance.

When you have completed the preparation above please call us on 0845 310 1788 x 2 We will then advise you how to access MIS app and send you your \*Organisation code which will be required during the installation of MIS app.

## Fund Manager preparation

Take your Leavers off.

As the new import file will NOT have any details of your leavers, you must take them off Fund Manager before importing the current pupil details.

Use the Administration>Manage Names menu in Fund Manager. Use the Group Actions section.

Create a NEW Year which is called LEAVERS and Add the Group. It will appear at the end of your Groups list.



Filter on your top year number. Select all the names in the top year, remove them from their current year and then add them to the new year Leavers.



In this example the top year is 10.

Enter 10 into the Filter field.

Click the box to the left of the word Name to select all the names on each page. Use the page numbers at the bottom of the names list to move through the pages.

The list on the right hand side will show all names that have been selected.

Filter: 10

<input checked="" type="checkbox"/>	Name	Class	Year
<input checked="" type="checkbox"/>	Adams, Jill		10
<input checked="" type="checkbox"/>	Black, Pat	Oak	10
<input checked="" type="checkbox"/>	Black, Jack	Ash	10
<input checked="" type="checkbox"/>	Black, Jill	Ash	10
<input checked="" type="checkbox"/>	Grey, Bill	Oak	10
<input checked="" type="checkbox"/>	Hall, Cain	Oak	10
<input checked="" type="checkbox"/>	Test, Ryan	Ash	10
<input checked="" type="checkbox"/>	Trek, Ellie		10
<input checked="" type="checkbox"/>	Turner, Simon	Ash	10
<input checked="" type="checkbox"/>	White, Alan	Oak	10

Consolidate

Batch Actions

These changes affect all the names you have selected

☐ In Use ☐ Out of Use

Update Name(s)

Group Actions

These changes affect all the names you have selected

Group: Year: 10

Add to Group Remove from Group

Remove all the selected  
Names from your top year  
group.

Click here to remove  
the selected names  
from year 10

Now In the Group Actions section, select the new group you have just created called Leavers.

Note the column headed 'year' will be  
empty until you add these names to  
Leavers.

The updated names will look like this.  
You can now import your current pupils.

<input type="checkbox"/>	ABC Supplies		
<input type="checkbox"/>	Adams, Jill		Leavers
<input type="checkbox"/>	Black, Pat	Oak	Leavers
<input type="checkbox"/>	Black, Jack	Ash	Leavers
<input type="checkbox"/>	Black, Jill	Ash	Leavers
<input type="checkbox"/>	Brown, Mr T		
<input type="checkbox"/>	Brown, Sam		10
<input type="checkbox"/>	Charity		
<input type="checkbox"/>	Childrens Charity		

Filter: 10

<input checked="" type="checkbox"/>	Name	Class	Year	R
<input checked="" type="checkbox"/>	Adams, Jill			
<input checked="" type="checkbox"/>	Black, Pat	Oak		
<input checked="" type="checkbox"/>	Black, Jack	Ash		Se
<input checked="" type="checkbox"/>	Black, Jill	Ash		Se
<input checked="" type="checkbox"/>	Grey, Bill	Oak		
<input checked="" type="checkbox"/>	Hall, Cain	Oak		
<input checked="" type="checkbox"/>	Test, Ryan	Ash		
<input checked="" type="checkbox"/>	Trek, Ellie			
<input checked="" type="checkbox"/>	Turner, Simon	Ash		Se
<input checked="" type="checkbox"/>	White, Alan	Oak		

Consolidate

Batch Actions

These changes affect all the names you have selected at

☐ In Use ☐ Out of Use

Update Name(s)

Group Actions

These changes affect all the names you have selected at

Group: Leavers

Add to Group Remove from Group

Click here to add these  
names to the new Year  
called Leavers.