



# CMIS Automated Pupil and Staff Import

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## Guidance for Schools

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## CMIS Automated Import Overview

New and existing schools that have a CMIS Management Information System are now able to use the automated import facility to upload their pupil and staff data, however there are a number of requirements you need to be aware of prior to proceeding to use the automated import process:

- The import is available to schools using CMIS Facility ePortal Version 13.3 and onwards.
- As part of this import process any leading zeros on the admission numbers are stripped upon import for both new and existing schools. If existing schools have pupil Id's presently uploaded to include leading zeros they will need to contact the ParentPay Support Team for assistance.
- The initial upload may fail due to 'bad data' within CMIS, such as text in a mobile number field. The data will need to be amended within CMIS and the ePortal restarted. A successful import can then be processed the following day.
- This import will include pupil MIS email and mobile contacts for use within the ParentPay Communication area should a school want to use this data.
- The import will take the child's 'preferred' forename and surname from CMIS. If 'Preferred' is unavailable within CMIS, the 'Legal' forename and surname will be used. If an existing upload has been actioned using 'Legal' name details, the import would display the amended details.
- The import will take the Year and Registration group as listed in CMIS. If these details differ from those added during a manual import, the data would display the amended details, for example Year One, may be amended to Year 1.
- Universal Infant Free School Meal Pupils need to be in year groups R, 1 and 2. If the year groups are listed differently within CMIS, ParentPay will not class these pupils as UIFSM.
- It is always recommended that pupil data is imported first. If staff data is being imported, it is important to ensure that the staff Id's are unique and differ to the pupil Id's to avoid any Id clashes on the system.
- The staff import will not be suitable for existing schools that have previously imported staff unless a data matching exercise is performed.
- FSM end dates are currently substituted with 01/01/2100. The data will need to be refreshed regularly in order to avoid balance adjustments.
- If any changes are made in ePortal, ePortal will need to be restarted and the import conducted the following day.
- The automated import process does not currently support pre-admissions
- The automated import process does not currently contain dietary information.

## School actions that MUST be completed before setup

- 1) Schools will need to provide ParentPay with the URL for their exposed ePortal web service. This will end in the letters '**wSDL**' and will look similar to this:

<https://eportal.schoolname.sch.uk/API/services/WebService?wsdl>

- 2) Schools will need to add the ParentPay IP address details to CMIS API security configuration file. You can locate this file using the following pathway:  
\Facility\ePortal\conf\Catalina\localhost\

```
<?xml version="1.0" encoding="UTF-8" ?>
<Context>
<Valve className="org.apache.catalina.valves.RemoteAddrValve" allow="158.58.167.20|82.147.6.164"/>
</Context>
```

**Note:** Integration has been developed for versions of Facility 13.3 onwards.

- 3) Schools will need stop and restart ePortal for any changes to apply

ParentPay staff will be able to view that the above actions have been carried out successfully, and ensure that you are ready to proceed with the automated upload process. If you are uncertain of any of the above actions please contact a member of the ParentPay Support Team who will be able to advise you.

## How to import your Pupil or Staff data

If you are a new school, using the automated import facility for the first time, you must ensure you import your pupil data first.

- Go to 'People' and select the 'Uploads' tab



- Choose the 'pupil' or 'staff' radial button and press 'Import'



You will be able to view the import history by clicking the **Upload history** navigation from the left of the screen.

**Note:** For new schools pupil and staff accounts can be uploaded directly from CMIS. However for existing schools, in order for the upload to be successful, the Staff Id must match the Id within CMIS. A member of the ParentPay Technical Team will need to match the Id's if they are different.

## Troubleshooting

In the scenario where a specific pupil or staff member is affected by a fatal error causing the import to fail, the interface will display an explanation. This will include the name or identifier where available (ie. admission number/UPN for pupil, MIS Id for a staff member).

### Common fatal errors that will result in the import failing

Below is a list of common fatal errors that are most likely to impact a CMIS upload

Error message	Error code	Reason
Unable to connect to CMIS Server	0	Check the following: <ul style="list-style-type: none"> <li>Ensure the URL is correct and that there are no spaces at the end</li> <li>Ensure you have added the ParentPay IP address to your CMIS API security configuration file separated by pipeline</li> <li>[The IP address details are: 158.58.167.20 82.147.6.164]</li> </ul>
Timeout connecting to Facility Server, Student import failed on <a href="https://eportal.schoolname.sch.uk/API/services/WebService?wsdl">https://eportal.schoolname.sch.uk/API/services/WebService?wsdl</a>	0	This error indicates that there has been a timeout when attempting to import the pupil data into ParentPay.
Duplicate data detected. The data has not been modified since it was last imported	0	There have been no changes in the data since the last pupil or staff import This will show as a failure.
<a href="https://eportal.schoolname.sch.uk/API/services/WebService?wsdl">https://eportal.schoolname.sch.uk/API/services/WebService?wsdl</a> could not be found	0	It is likely you have upgraded your version of CMIS Facility. Advanced Learning advise the following solution: <ol style="list-style-type: none"> <li>Stop the ePortal and Dataserver services.</li> <li>Cut out 'API' folder (location: ePortal   Webapps)</li> <li>Start services.</li> <li>API.war should now re-create an API folder</li> </ol>
RequiredFieldMissing	6	Mandatory information is missing. Please correct the information and re-attempt the upload.
FieldLengthError	17	This error will occur if a field, such as mobile number, contains too many characters. For mobile numbers, the length is 20 characters and ParentPay will take the first '0' and replace this with +44 In this scenario, it will inform the user of the number in question and the pupil's admission number/UPN. The mobile number field should only contain one mobile number. The numbers will need to be amended and ePortal restarted before the import will work successfully. The import will need to be conducted on the following day.

## Common non-critical errors that will result in the import still being processed

Below are a list of non-critical errors that may impact a CMIS upload

Error	Error code	Reason
WarnFSMAdjustmentsMade	10001	This occurs when an upload has already been completed and the FSM dates differ to the ones that already exist within ParentPay. This is a non-critical error and the upload will still be processed, but there will be a balance adjustment with this error.
WarnFSMAdjustmentAffectedPupil	10002	This error would occur when a FSM period already within ParentPay, differs to the FSM period being imported, resulting in a balance adjustment.
WarnFSMIgnoringStartAfterToday	10003	This error would occur when the FSM start date is prior to the date of upload, so no changes will be made.
WarnFSMIgnoringEndBeforeToday	10004	This error would occur when the FSM end date is prior to the date of upload, so no changes will be made.
WarnMissingFSMEnd	10006	Where there is no FSM end date specified, ParentPay will substitute the end date with 01/01/2100
WarnMobileNumberAltered	10012	Where a contact mobile contains an invalid or irregular character, such as a full stop or a hyphen, ParentPay will remove this and concatenate the number.

## Duplicated file imports

If no data has been amended since the last import was successfully completed, the import will fail, this is normal and the following message will be displayed:

'Duplicate data detected. The data has not been modified since it was last imported'.