

Excel Add-in

Installation & User Guide



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Pre-requisites

- If you are a local installation you must have SSL installed on the Bromcom server. If you need support setting this up contact the **Helpdesk**
- You must have Microsoft Excel installed on your machine
- You need **Administrator** rights to install the **Add-in**

You will need to make sure you have the correct **Permissions** to use the **Excel Add-in** to check this.

Open the MIS and go to **Config > Setup > Roles and Permissions** and select the **Role** you want to amend and click **Edit**.

Select the **Reporting** option from the **Module** dropdown, look for the **Excel Add-in** option and tick this and click **Save**.

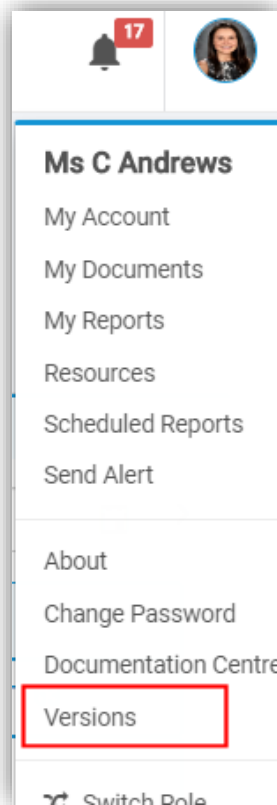
The screenshot shows the 'Edit Role: Attendance Officer' form. At the top, there are 'Save' and 'Cancel' buttons. Below, the 'Role Name*' is 'ATTOFFICER', 'Role Description' is 'Attendance Officer', and 'Role Rank' is '99'. There is a checkbox for 'Two Factor Authentication'. The 'Module' dropdown is set to 'Reporting'. Below this, there is a 'Report Design Permission' button and 'Expand All'/'Collapse All' buttons. A table lists permissions for various menu items. The 'Excel Add-in' row is highlighted with a red box, and its 'Access' checkbox is checked.

Menu Name	Access	New	Edit	Delete	Save
Reporting					
Adhoc Reports					
Advanced Reports					
Quick Report					
Excel Add-in	<input checked="" type="checkbox"/>				
SCR Records					
Online Report Permissions Upload					

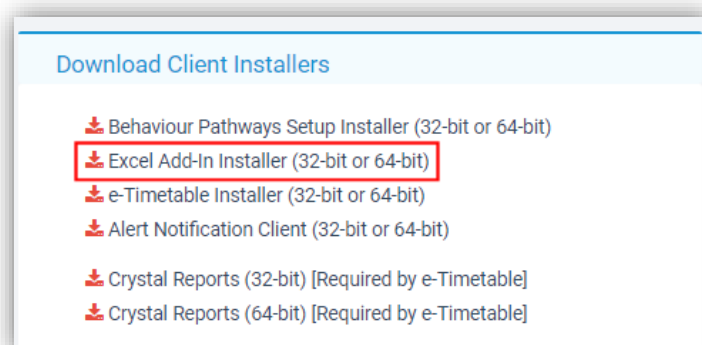
All **Users** with this **Role** will now be able to access the **Excel Add-in** option. Repeat this for other **Roles** if required.

Installation

Login to the MIS, click on your **Image** in the top right hand corner of the page. From the dropdown menu select **Versions**.

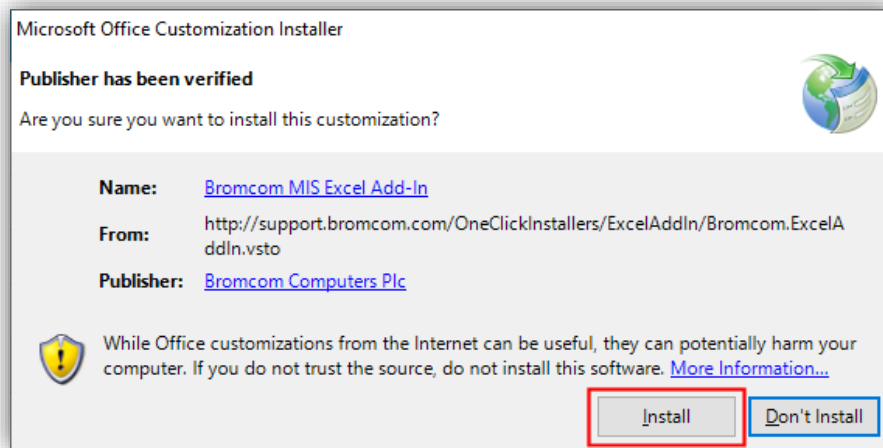


At top right of this page under **Download Client Installers** you will see click on the **Excel Add-in Installer (32-bit or 64-bit)** link to download the **Installer**.

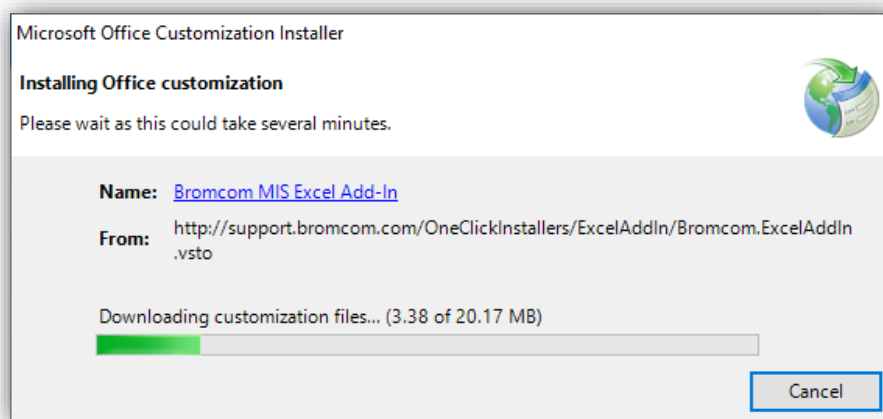


This will download the **Installer**, access the **File** from your downloads (this may be different depending on which browser you use) and double click on it to start the **Installation**.

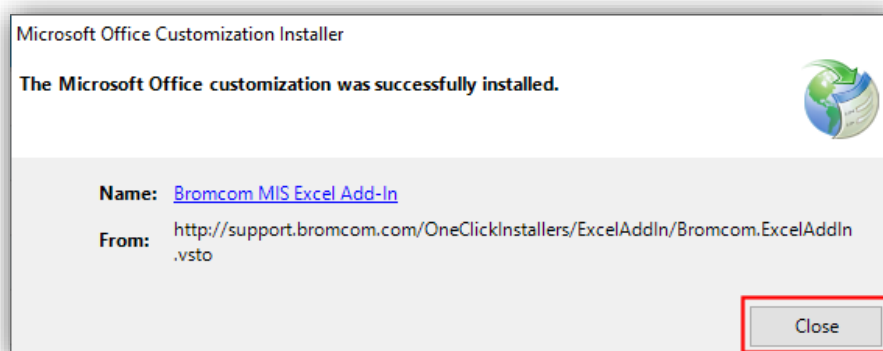
The **Installer** will be verified, when done click on the Install button.



The **Installer** will begin the Installation.



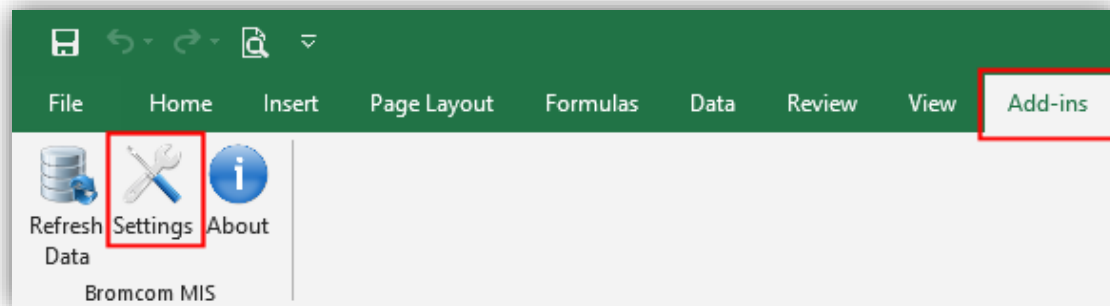
When complete close the **Installer**.



The installer will now installed the files needed for the **Add-in**.

Settings

Now open up Excel and click on the **Add-ins** tab at the top of the page and then click on the **Settings** button on the left.



You now need to fill out the highlighted details for your **Connection Settings** and click the OK button. This will retain the **Connections Settings** information you just entered.

A screenshot of the 'Settings - Book1' dialog box. The 'Connection' tab is active, and the 'URL' field is highlighted with a red box. The 'URL' field contains the text 'https:// cloudmis.bromcom.com'. Other fields include 'School ID' (placeholder: 'Your school ID'), 'Username' (placeholder: 'Your Username'), and 'Password' (placeholder: '*****'). The 'OK' button is highlighted with a red box. The dialog box also has sections for 'Configured Sheets' and 'Sheet Settings'.

URL – This will be **cloudmis.bromcom.com** if you are a **Cloud User** or the name of your **Server** if you are a **Local Installation**.

School ID – This is your unique **Bromcom Site Number**. Your Administrator will know what this is or contact the Bromcom Helpdesk.

Username and **Password** – Enter your **Username** and **Password**.

You can now use the **Excel Add-in**.

Using the Excel Add-in

Destination Sheet – This gives you the option to choose which sheet to **Export** the **Data** to and which **Cell** to start in.

Source Domain – From this dropdown you can choose which **Domain** you want data from.

Currently you can choose from Assessment Results, Behaviour Events, Exam Results, Single Central Records for External Staff, Support Staff or Teaching Staff, Student Actions, Student Groups, Students, Termly Attendance and several Finance options.

Filters – The **Filters** option allows you to add **Filters** to narrow down the data that is **Exported** into the sheet, just click the Add button and select from the dropdown list.

Once these have been selected click on the **Save** button.

Settings - Book1

Connection
URL: https:// cloudmis.bromcom.com
School ID: Your School ID
Username: Your Username
Password: *****

Configured Sheets
Add
Delete

Sheet Settings
Destination Sheet: Sheet1 Starting Cell: A1
Source Domain: Behaviour Events
Filters:
Add Edit Delete
Save

OK

You will notice that when clicking **Save** the **Sheets** you selected from the **Destination Sheet** option will display in the **Configured Sheets** panel on the left. These can be removed or added by clicking on the Delete button with the Sheet selected. When finished click the **OK** button.

Settings - Book1

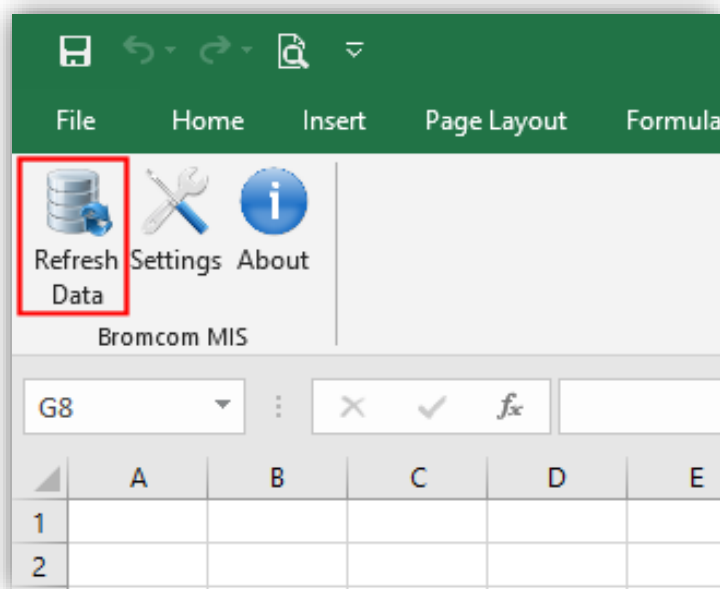
Connection
URL: https:// cloudmis.bromcom.com
School ID: Your School ID
Username: Your Username
Password: *****

Configured Sheets
Sheet1
Add
Delete

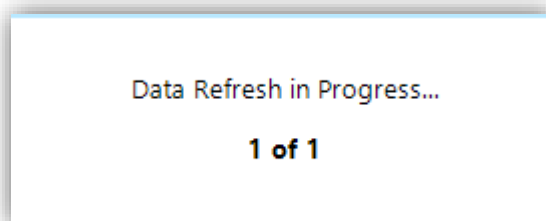
Sheet Settings
Destination Sheet: Starting Cell:
Source Domain:
Filters:
Add Edit Delete
Save

OK

After clicking **OK** you will be returned to a blank worksheet. Click on the **Refresh Data** button.



The **Add-in** will now **Import** the selected data into one or more worksheets.



EventRecordID	StudentID	EventID	EventName	EventDescription	OwnerID	Owner	ClassID	CollectionName	CollectionDescription	LocationID	LocationName	LocationDescription	Witness	EventDate	Adj.
26335	498	14	HLA	No Lates (month)	5	Mr B Smith								30/10/2017	
23366	863	10	CWL	Good Classwork	6	Ms C Andrews	36	07A	07A					29/04/2015	
23521	765	1038	RHW	Good Homework	6	Ms C Andrews	1382	MFL-07A-1	MFL-07A-1 (14/15)					22/07/2015	
26496	2251	10	CWL	Good Classwork	7	Mr P Dougherty	9736	CH08A-1-ABD	CH08A-1-ABD (17/18)					16/05/2018	
26497	2278	10	CWL	Good Classwork	7	Mr P Dougherty	9736	CH08A-1-ABD	CH08A-1-ABD (17/18)					16/05/2018	

If you have any questions or queries regarding the installation or operation of the **Excel Add-in** please contact the **Helpdesk**.

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