



SA-SAMS MIGRATION GUIDE · Edition 2026

From spreadsheets to one source of truth.

A 5-phase, 6-week playbook for moving from SA-SAMS, paper, or hybrid operations to a single digital backbone — without losing a single learner record.

5 Phases

6 Weeks

Zero Data Loss

LURITS-validated

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Built in South Africa · 2026

WHY MIGRATE

SA-SAMS is the floor, not the ceiling.

SA-SAMS gets you reporting-compliant. It doesn't run your school day-to-day. This guide is for schools, groups, and TVET colleges moving from SA-SAMS, paper, or a patchwork of spreadsheets to a platform that handles operations and reporting from the same data.

6 weeks

TYPICAL TIMELINE

0

DATA-LOSS TOLERANCE

1 week

PARALLEL-RUNNING WINDOW

100%

LURITS VALIDATED

WHO THIS IS FOR

Schools moving from SA-SAMS, paper, spreadsheets — or all three.

Most South African schools run a hybrid: SA-SAMS for compliance, Excel for fees and attendance, WhatsApp groups for parent comms, paper for everything else. This guide is the bridge to one place.

THE FIVE PHASES

PHASE 1	Discovery & data audit <i>(detail in the chapters that follow)</i>	Week 1
PHASE 2	Mapping & cleanup <i>(detail in the chapters that follow)</i>	Week 2
PHASE 3	Migration & validation <i>(detail in the chapters that follow)</i>	Weeks 3–4
PHASE 4	Parallel run & training <i>(detail in the chapters that follow)</i>	Week 5
PHASE 5	Cutover & SA-SAMS handshake <i>(detail in the chapters that follow)</i>	Week 6

Week 1 — Audit what you actually have.

Most migrations fail because nobody mapped the real data sources. The school office has SA-SAMS. The bursar has fee spreadsheets. The teachers have mark books. Heads of department have a WhatsApp group. All of it migrates.

- 1 Inventory every data source**
List SA-SAMS, every spreadsheet, every system, every paper register. If a teacher uses it for marks, attendance, or comms — it's in scope.
- 2 Identify the data owner per source**
Each source needs a named human who owns it. They sign off on data-quality before migration and on go-live readiness after.
- 3 Snapshot SA-SAMS and Excel exports as-is**
Take date-stamped exports of everything. These are your fallback in week 6 if you ever need to roll back.
- 4 Map institutional structure**
Grades, classes, subjects, streams, terms, periods. Name conventions vary wildly between schools — lock yours down before mapping fields.
- 5 Document compliance touchpoints**
What gets submitted to whom, when, and from which data source today. SA-SAMS, LURITS, district, DBE — all noted with cadence and last-submission date.

Week 2 — Mapping & data cleanup.

Now the unglamorous work: every legacy field maps to one canonical eduSYMS field, every duplicate is collapsed, every gap is decided on. Get this right and the migration itself is a script.

- 1 Map legacy fields to canonical records**

SA-SAMS field 'Surname' → learner.lastName. Excel column 'Cell' → guardian.phone. Build the mapping table once, signed off by data owners. This becomes the migration spec.
- 2 Resolve duplicates and conflicts**

Same learner spelled three ways across SA-SAMS, fees, and attendance? Decide canonical spelling. Conflicting parent phone numbers? Check with parents. This is the gate before migration.
- 3 Validate or generate LURITS IDs**

Every active learner needs a LURITS. Validate existing IDs against ID/passport + DoB; flag missing ones for issue-or-chase before cutover.
- 4 Standardise date formats and codes**

Birthdates, enrolment dates, gender codes, race codes, language codes — all to DBE-compliant values. Free-text fields get tightened.
- 5 Decide gap-handling rules**

Missing attendance for week 4 of term 1? Missing parent contact for 12% of learners? Decide upfront how to handle each gap class. Don't discover them during migration.

Weeks 3–4 — Move and validate.

The actual migration is the easy bit if Phases 1–2 were done properly. The validation pass is what actually matters: every record reconciles back to its source.

- 1 Run the migration in three stages**
Stage 1: identity (learners, staff, guardians). Stage 2: structure (classes, subjects, timetables). Stage 3: history (attendance, marks, fees). Each stage validates before the next runs.
- 2 Reconcile counts at every stage**
Source row count = destination row count, every time. A delta of 1 is a problem, not a rounding error. Document why each reconciled or didn't.
- 3 Spot-check 10% of records by hand**
Pick a random 10% sample, open the new record alongside the source, and eyeball every field. This catches mapping bugs no automated check finds.
- 4 Validate compliance exports**
Run a draft SA-SAMS export. Compare against the previous quarter's SA-SAMS export. Differences should be explainable (new enrolments, exits) — never structural.
- 5 Sign off by data owner**
Each Phase 1 data owner signs off on their domain in writing. No verbal 'looks fine'. This is the audit trail for the migration itself.

Week 5 — Run both, in parallel.

For one week, every operational action happens in both the new platform and the old one. Painful for a week, but it's the only way to surface the workflow gaps that no spec ever catches.

- 1 Daily attendance in both systems**

Teachers mark attendance in eduSYMS and in their existing register. Each day, reconcile any deltas. By Friday the deltas should be zero — that's the green light for cutover.
- 2 Fee receipts in both systems**

Bursar enters every receipt in both. Compare end-of-day balances. This finds rounding, currency, and date-handling bugs that no test data ever surfaces.
- 3 Train administrators by role**

Principal, deputy, bursar, registrar, HOD, teacher — each gets a 90-minute role-based session, not a generic walkthrough. They go back to their desks and use the system that afternoon.
- 4 Run a real submission dry-run**

Pick the next due submission (likely SA-SAMS termly). Generate it from eduSYMS as if going live. Compare to what would have come out of the old workflow.
- 5 Capture the workflow gaps**

Every 'I usually do this in Excel' or 'we never had to track that before' moment is logged. Half become configuration changes; half become process changes. All get resolved before cutover.

Week 6 — Cutover & SA-SAMS handshake.

Cutover is a formality if Phase 4 went well. The headline event is the SA-SAMS handshake: from now on, SA-SAMS submissions are generated from eduSYMS, not maintained inside SA-SAMS itself.

- 1 Freeze the legacy systems on Friday**
Friday close-of-day: snapshot, archive, lock. Monday morning, eduSYMS is the only place anything gets written.
- 2 First-day operational support**
On-site or on-WhatsApp support from the eduSYMS team for the full first day. Most issues are 10-second answers — being there to give them is what makes the day quiet.
- 3 Generate the first SA-SAMS export**
Termly, run the SA-SAMS export from eduSYMS, validate against the destination schema, and submit. First time is a guided walkthrough; second time onwards it's a click.
- 4 Decommission redundant spreadsheets**
Every spreadsheet that fed the old workflow gets archived and removed from circulation. If a teacher still has it open in week 7, you've not migrated their workflow — go fix it.
- 5 30-day post-go-live review**
30 days after cutover, sit down with the leadership team. What's faster, what's slower, what's missing. Adjustments roll in immediately.

PITFALLS

The five mistakes that derail migrations.

Across hundreds of migration projects, the same five mistakes show up. Knowing them in advance means avoiding them — none are technical.

- 1 Skipping the data-owner step**
If a domain doesn't have a named human owner, its data quality will silently regress. Naming an owner is non-negotiable, even at small schools.
- 2 Migrating without cleanup**
'We'll clean it up after migration.' You won't. Migrate clean data or accept that the new system will have all the old system's data quality issues.
- 3 Going live without parallel run**
Skipping Phase 4 to save a week costs four weeks in post-go-live firefighting. Parallel running is the cheapest insurance you'll buy.
- 4 Training the wrong people**
Generic training sessions don't work. Role-based training works. The principal's session is not the same as the bursar's session is not the same as the teacher's session.
- 5 Treating cutover as the end**
Cutover is the start of the operational phase. The 30-day review is what actually closes out the project — and it's where the real productivity gains get unlocked.

RECAP

The 6-week migration in one page.

Five phases, five outcomes. If any of these aren't visibly met by week's end, slow down before moving on.

- 1 Week 1 — Discovery**
Every source mapped, every owner named, every compliance touchpoint documented.
- 2 Week 2 — Mapping**
Every legacy field maps to a canonical eduSYMS field. Duplicates resolved. LURITS validated.
- 3 Weeks 3–4 — Migration**
Three-stage migration: identity → structure → history. 10% spot-check passes. Counts reconcile.
- 4 Week 5 — Parallel run**
Both systems run side by side. Deltas reach zero. Role-based training complete.
- 5 Week 6 — Cutover**
Legacy frozen Friday. eduSYMS only on Monday. First SA-SAMS export generated and submitted.
- 6 30-day review**
Leadership review what's faster, slower, missing. Adjustments roll out.

Don't run this alone.

Every eduSYMS implementation comes with a named migration lead, a parallel-run rehearsal, and the first SA-SAMS submission run together. Book a free 30-minute scoping call.

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