SBS
School Business Services

For the academic year 2018/2019

Primary School End of Year Procedures

Detailed

SIMS helping schools inspire
Accredited Support

Contents

01| Setting Up the New Academic Year 1

Overview 1
Setting Permissions 2
Where to Find More Information 2
End of Year Procedure Check List 2
Routines for After the New Academic Year has Started 3
Recording Changes to Teaching Staff in Personnel 3
Adding New Teachers to Personnel 4
Creating the New Academic Year 7
Defining the School Working Week 8
Defining School Terms 9
Adding Additional School Terms 11
Defining Half Term Holidays 12
Defining Teacher Training Days 14
Defining Public Holidays 15
Creating the New Academic Year 16
Setting up the New Academic Year's Pastoral Structure 18
Opening the Structure of the New Academic Year 19
Checking National Curriculum Years 20
Adding New Year Groups 20
Adding Classes (Registration Groups) 23
Important Note on Editing Class Names 26
Changing Year Group Horizontal/Vertical Structures 27
Saving the Amended Pastoral Structure 31
Adding Intake/Admission Groups 32
Adding One or More Admission Groups 34
Adding an Admission Group (Multiple Groups Not Enabled) 35
Importing Admissions and Transfer Files (ATF) 35
Importing Common Transfer Files (CTFs) 35
Checking Dates for Part-Time Pupil/Students 37
Recording Leavers 38
Exporting Common Transfer Files (CTFs) 40
Setting up the Promotion Mapping for the New Academic Year 43
Viewing/Setting the Promotion Path for Individual Pupil/Students 47
Checking the Registration Tutors Assigned 50
Changing the Status of Applications to Offered or Accepted 50

Adding Leaving Dates for Existing Staff Members in Personnel 54
Allocating Applicants to Registration Groups/Classes 55
Printing Class (Registration Group) Lists for the New Academic Year 58

02| Processes to be Carried Out in Other SIMS Modules 61

In SIMS Attendance - Entering Reasons for Absence Last Year 61
Academic Management (Primary Curriculum) End of Year Processes 62
Dinner Money 63
Meal Charges Mapping 63
After the New Academic Year has Started 64
Admitting Applicants 64
Re-Admitting Pupil/Students 67
In SIMS Attendance - Printing the Official Register for July .. 68
In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes 69
Running Housekeeping Routines in SIMS 71
Importing the Key Stage Wizard 71
SIMS Learning Gateway 72
Archiving Attendance Marks 72
Adding/Removing Users from SIMS Online Services Products 72
In SIMS Attendance - Printing OMR Registration Sheets for the First Week of Term 73

01 | Setting Up the New Academic Year

Overview 1
Setting Permissions 2
Where to Find More Information 2
End of Year Procedure Check List 2
Recording Changes to Teaching Staff in Personnel 3
Creating the New Academic Year 7
Setting up the New Academic Year's Pastoral Structure 18

Overview

This document describes the steps that should be followed to enable a successful transition from one academic year to another. It includes the creation of a new academic year, setting up next year's registration groups and year groups, etc. together with the promotion of pupil/students from one year into the next.

It is applicable to Primary school SIMS users. Secondary school users should refer to the *Secondary School End of Year Procedures*, available from the School Business Services Blog (http://www.schoolbusinessservices.co.uk/blog/)

WARNING: *You must complete these procedures before the start of the new academic year. It is critical that the new academic year is created and promotion routines run before the old year ends. These processes determine the year groups and registration groups into which pupil/students are placed in the new academic year. We therefore suggest you start these processes as early as possible, allowing sufficient time to complete by the start of the new academic year.*

IMPORTANT NOTE: *The processes described in this document remain the same each year; they are not specific to a single academic year. The only changes made to this document each year relate to the graphical examples and the sample dates provided in graphics and in the body of the text.*

In future years, if you wish to start your preparations for the next academic year before an updated End of Year Procedures document is made available, you can use the document prepared for the previous year as a guide, remembering to change the sample dates to those in the forthcoming academic year.

Setting Permissions

The permissions required to carry out the various end of year processes vary. However, users who are members of the School Administrator and Admissions Officer user groups in System Manager can carry out all the functions in this document. Please consult your System Administrator if you are unsure whether you have the required permissions.

Where to Find More Information

Online help can be accessed by pressing **F1** or clicking the applicable **Help** button in SIMS.

A wide range of documentation is available from the SIMS **Documentation Centre**, including handbooks, quick reference sheets and tutorials. Click the **Documentation** button (located on the top right-hand side of the SIMS **Home Page**), select the required category and then select the document you require. Alternatively, use the **Search** facility to locate the required document.

End of Year Procedure Check List

This section provides a check list of all the actions that form part of the end of year process.

Complete	Description/Task
❑	Record changes to teaching staff in Personnel (please see *Recording Changes to Teaching Staff in Personnel* on page *3*).
❑	Create the new academic year (please see *Creating the New Academic Year* on page *16*).
❑	Set up the pastoral structure for the new academic year (please see *Setting up the New Academic Year's Pastoral Structure* on page *18*).
❑	Add intake and admission groups (please see *Adding Intake/Admission Groups* on page *32*).
❑	Import Admissions and Transfer Files (please see *Importing Admissions and Transfer Files (ATF)* on page *35*).
❑	Import Common Transfer Files (please see *Importing Common Transfer Files (CTFs)* on page *35*).
❑	Check dates for part-time pupil/students (please see *Checking Dates for Part-Time Pupil/Students* on page *37*).
❑	Record leavers (please see *Recording Leavers* on page *38*).
❑	Export Common Transfer Files (please see *Exporting Common Transfer Files (CTFs)* on page *40*).
❑	Set up the promotion mapping for the new academic year (please see *Setting up the Promotion Mapping for the New Academic Year* on page *43*).

Complete	Description/Task
☐	Change the status of applications (please see *Changing the Status of Applications to Offered or Accepted* on page *50*).
☐	Allocate applicants to registration group/classes (please see *Allocating Applicants to Registration Groups/Classes* on page *55*).
☐	Print class/registration group lists for the new academic year (please see *Printing Class (Registration Group) Lists for the New Academic Year* on page *58*).
☐	Print OMR registration sheets for the first week of term (please see *In SIMS Attendance - Printing OMR Registration Sheets for the First Week of Term* on page *73*).
☐	Enter reasons for absence last year (please see *In SIMS Attendance - Entering Reasons for Absence Last Year* on page *61*).
☐	Map meal charges (please see *Meal Charges Mapping* on page *63*).
☐	SIMS Learning Gateway (please see *SIMS Learning Gateway* on page *72*).

Routines for After the New Academic Year has Started

Complete	Description/Task
☐	Admit applicants (please see *Admitting Applicants* on page *64*).
☐	Re-admit pupil/students (please see *Re-Admitting Pupil/Students* on page *67*).
☐	Print the official register for July (please see *In SIMS Attendance - Printing the Official Register for July* on page *68*).
☐	Add 'Not Required' codes (please see *In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes* on page *69*).
☐	Run housekeeping routines (please see *Running Housekeeping Routines in SIMS* on page *71*).

Recording Changes to Teaching Staff in Personnel

This section applies only to schools using Personnel, i.e. you are recording all staff details, including contracts, training events and absences in SIMS.

The details of new teachers joining the school should be recorded as soon as the information is available (non-teacher information can be added when known, but is not required for the end of year process). Any existing teachers who are leaving the school should be allocated a leaving date.

Adding New Teachers to Personnel

Initially, only **Basic Details** and **Employment Details** need to be entered. Further details can be added as they are known. For full instructions, please refer to the *Managing Staff* handbook.

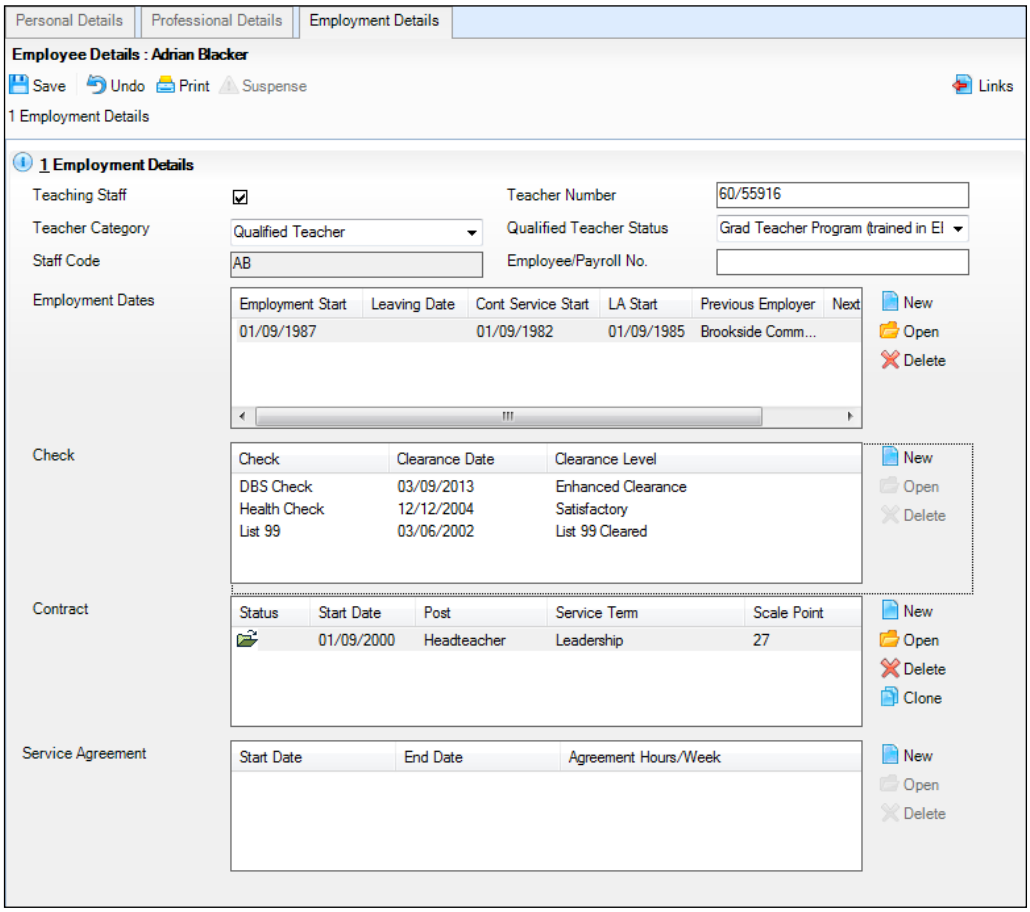
1. Select **Focus | Person | Staff** to display the **Find Employee** browser. Click the **New** button to display the **Add Employee** page.

2. Enter the **Surname**, **Forename**, and then select their **Gender** from the drop-down list.

3. Enter the **Date of Birth** in dd/mm/yyyy format or click the **Calendar** button to select the required date.

Calendar button

4. Click the **Continue** button. SIMS checks to see if the member of staff already exists. If no entry exists, the **Employee Details** page is populated with the data just entered.
5. Click the **Employment Details** tab to display the **Employment Details** panel.



6. Select the **Teaching Staff** check box for all teaching staff. This activates the **Teacher Category** drop-down list.

> *NOTE: It is important to identify teachers by selecting this check box as it ensures teachers are included in all applicable returns.*

7. Select the required **Teacher Category** (e.g. **Qualified Teachers**) from the drop-down list.
8. Enter a **Teacher Number** if required. This must be in the format NN/NNNNN, where N represents a number, e.g. **60/55916**.
9. Select the required **Qualified Teacher Status** from the drop-down list.
10. Enter a unique **Staff Code** (up to three characters), if required.

11. Enter the **Employee/Payroll No.**, if known.
12. In the **Employment Dates** panel, create or edit a record and record the continuous service start date (**Cont Service Start**), local authority start date (**LA Start**) and **Employment Start** date, or click the respective **Calendar** buttons and select the required dates.
13. Enter the name of the **Previous Employer**, if known.
14. Add a record for a **DBS Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date clearance was received (**Clearance Date**) or click the **Calendar** button to select the required date.
15. Add a record for a **Health Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date that the questionnaire was returned (**Clearance Date**) or click the **Calendar** button to select the required date.
16. Record any additional checks, if required.
17. Click the **Save** button to add the member of staff. Repeat for any other members of staff joining the school.

❑ **Completed**

Creating the New Academic Year

This process defines the start and end dates for each of the school terms and half-term holidays, together with dates for public holidays and staff training days. If SIMS Attendance is in use, appropriate attendance records are created for each pupil/student on the dates entered.

IMPORTANT NOTES:

Due to the amount of processing resource required to create an academic year, whilst not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. Continuing to work whilst an academic year is being created is likely to result in error messages.

Please be aware that the process may take a long time because the system creates attendance records for the new academic year.

When creating an academic year, the start date of the first term is deemed to be the first day of the academic year. This may not necessarily be the day that pupil/students arrive in school; it could be an INSET day, for example. An end date is calculated for 365 days later.

For example, if the academic year starts on 04/09/2018 then an end date of 03/09/2019 is automatically supplied.

The first day of term should be specified even if pupil/students are not in attendance.

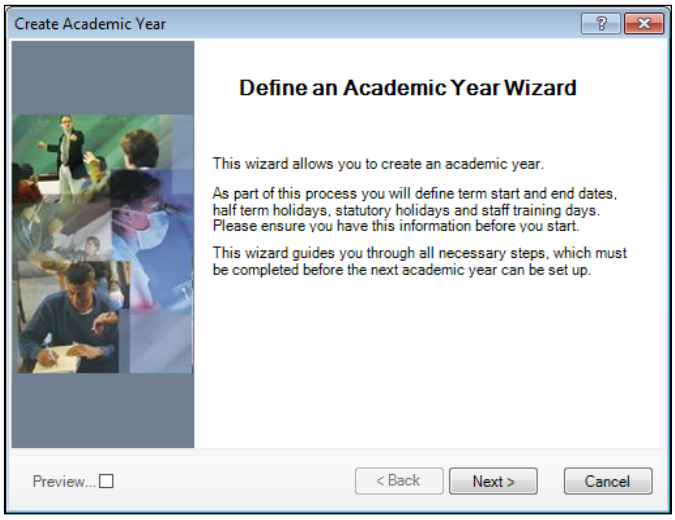
Any dates within the start and end dates of the academic year that are not term dates or training days, are considered to be holidays. This prevents the need to manually enter holidays (apart from half-terms and bank holidays).

Promotion into new year groups, etc. occurs automatically on the first day of the first term of the new academic year (providing that the promotion process has been carried out).

Before proceeding, please check that you have carried out the following:

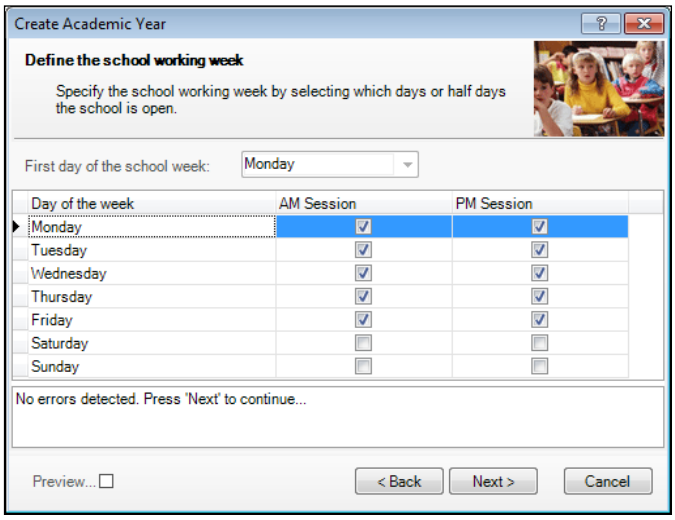
- Recorded any changes to teaching staff (adding any new teachers and dates of leaving for any leavers).
- Ensured that you have the new academic year term dates, training days, etc. to hand.

1. Select **Routines | School | Academic Year** to display the **Create Academic Year** wizard.



2. Click the **Next** button to display the **Define the school working week** page.

Defining the School Working Week



The **First day of the school week** drop-down list is read-only and displays the first day of your school week, as specified when your system was first set up.

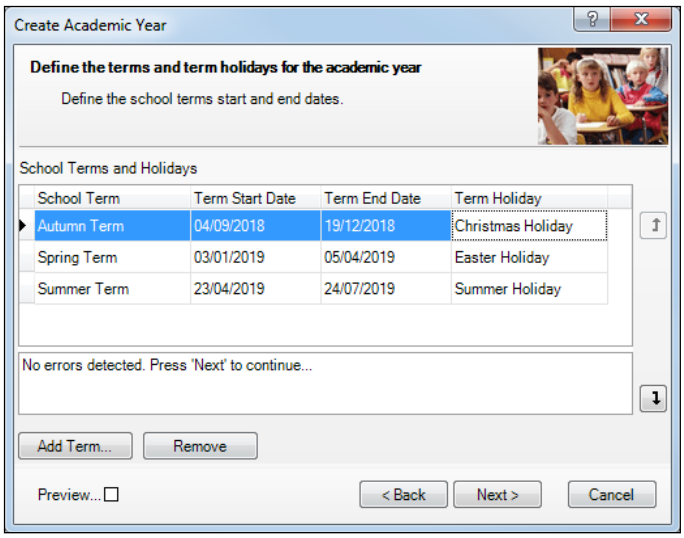
1. Define the days when the school will be open by selecting the check box(es) adjacent to each required day, including both AM and PM sessions, as required. **AM Session** and **PM Session** check boxes are selected by default for Monday through to Friday.

> *NOTE: Boarding schools should select all fourteen sessions to record weekend registration.*

2. Click the **Next** button to display the **Define the terms and term holidays for the academic year** page.

Defining School Terms

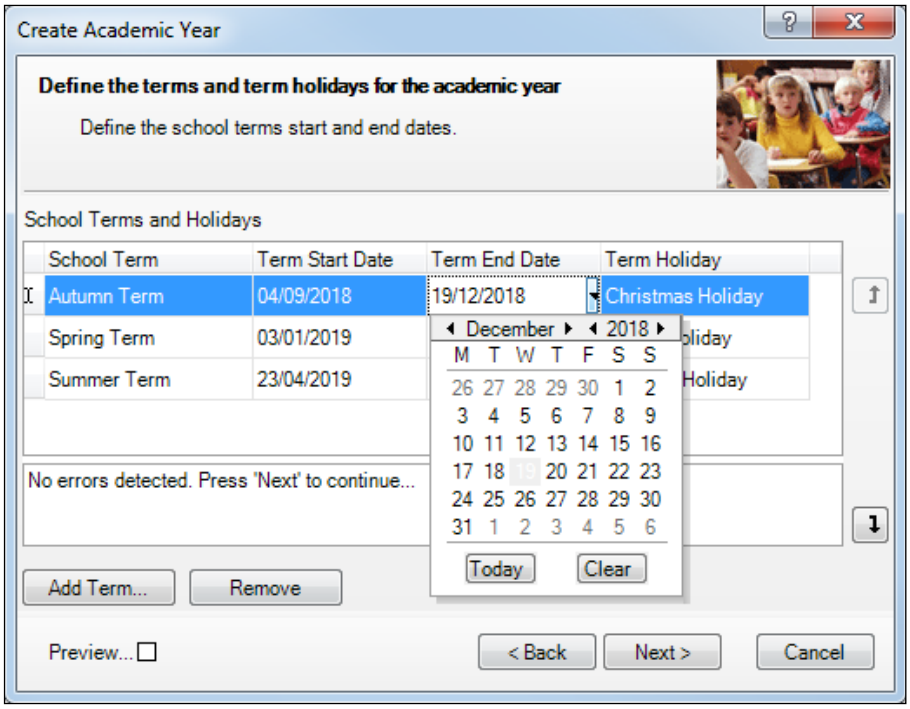
When entering term dates, the start date should always be the date the term starts, even if pupil/students are not in school on those days.



1. Enter the dates for the Autumn, Spring and Summer terms by clicking in the applicable **Term Start Date** and **Term End Date** fields and entering the dates in dd/mm/yyyy format, or by selecting from the calendar.

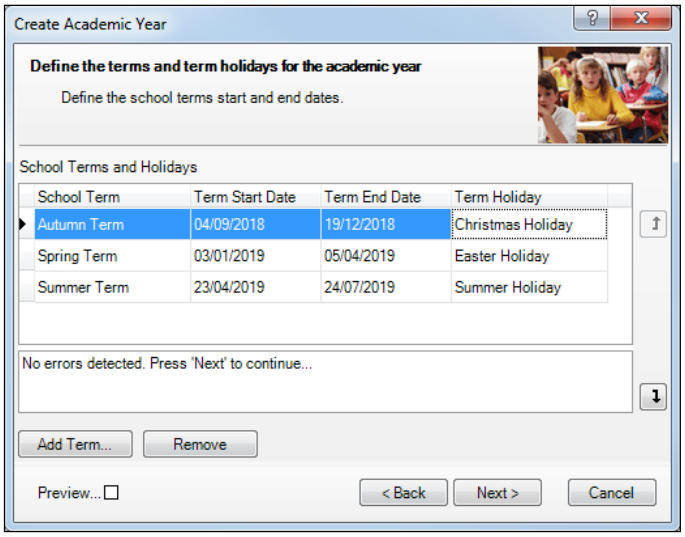
> *NOTE: Schools that have more than three terms in their academic year need to add additional terms (please see* Adding Additional School Terms *on page* 11*).*

Alternatively, click in the date cell until a down arrow appears then click the arrow to display a calendar, from which the required date can be selected.



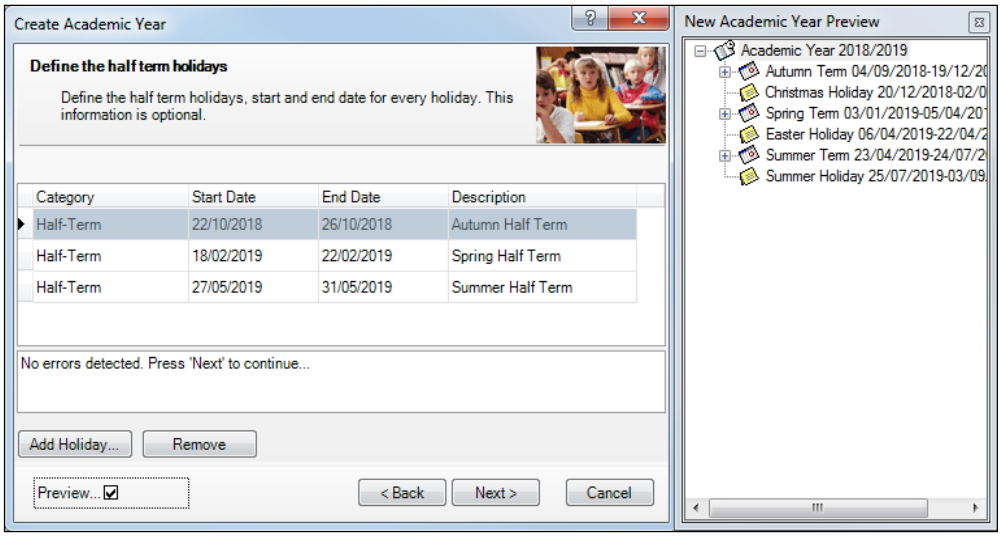
*NOTE: You can overtype the name of the term in the **School Term** column if a different name is required.*

2. Each term has a default holiday displayed in the **Term Holiday** column. If required, select a different holiday from the drop-down list or manually enter a new holiday name.
3. Repeat this process for all the default terms displayed, selecting the applicable holiday for each term. Any errors are displayed in the lower section of the wizard and must be resolved before you can proceed.



4. If you are happy with the default three school terms, click the **Next** button to display the **Define the half term holidays** page and proceed to *Defining Half Term Holidays*.

> *NOTE: If the **Next** button appears greyed out, move the cursor off the last **Term End Date** by pressing the **Tab** key.*



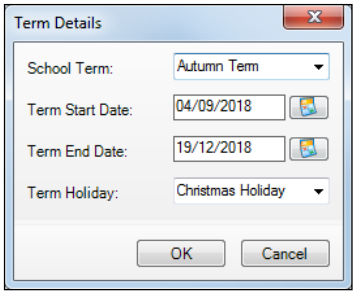
From this point onwards, you can select the **Preview** check box in the wizard to display a preview panel on the right-hand side of the wizard. The preview panel updates based on the selections you make throughout the process. Deselect the **Preview** check box whenever you want to hide the preview panel.

Adding Additional School Terms

Some schools may wish to add additional terms, if for example your school has four or six terms in an academic year. The following example demonstrates the addition of an Autumn term.

> *NOTE: When adding terms, the start date should always be the date the term starts, even if pupil/students are not in school on that day.*

1. From the **Define the terms and term holidays for the academic year** page of the wizard, click the **Add Term** button to display the **Term Details** dialog.



2. Select the term name from the **School Term** drop-down list. If the required name does not exist, enter a name manually, e.g. `Autumn Term`.
3. Enter the **Term Start Date** and **Term End Date** in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.

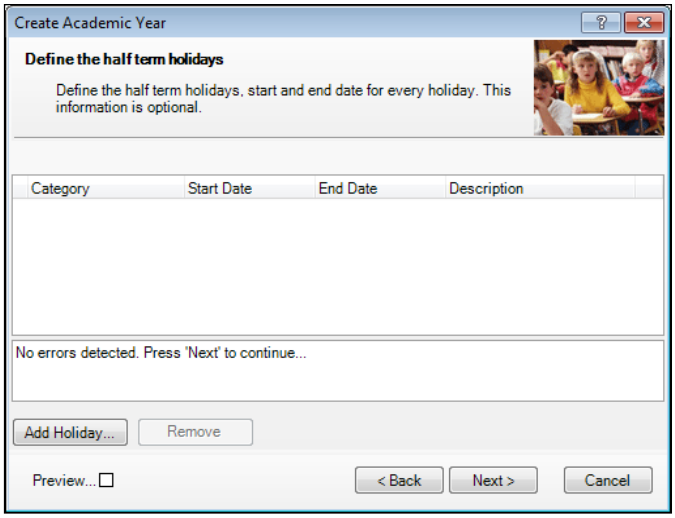
Calendar button

4. Select the holiday that will follow the term from the **Term Holiday** drop-down list, e.g. **Christmas Holiday**. If the required name does not exist, enter the holiday name manually, e.g. **Christmas Holiday**.
5. Click the **OK** button to add the term.
6. Repeat for any other additional terms that may be required.
7. Click the **Next** button to display the **Define the half term holidays** page.

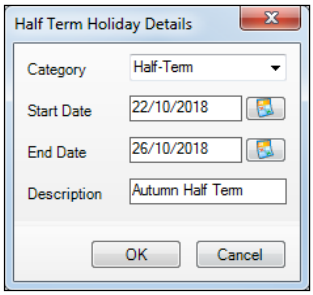
Defining Half Term Holidays

Holidays are created automatically for the dates in between the term dates entered. For example, if the Spring term ends on 05/04/2019 and the Summer term starts on the 23/04/2019, then it is assumed that the dates in between are holidays. In addition, you need to enter the dates for half-term holidays manually.

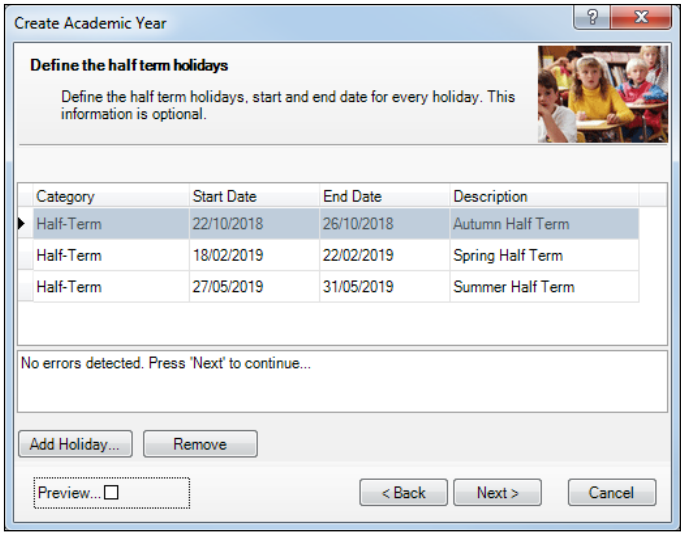
> *NOTE: You do not need to define half-term holidays if you have created a six term academic year, where the half-term dates fall between the terms.*



1. From the **Define the half term holidays** page, click the **Add Holiday** button to display the **Half Term Holiday Details** dialog.



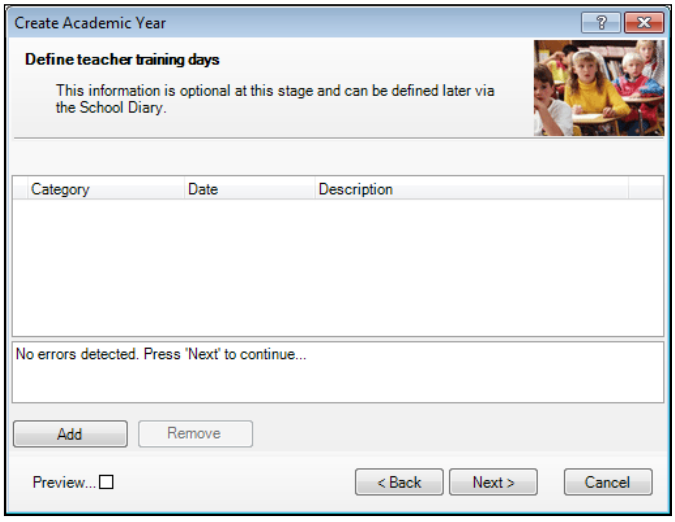
2. Select **Half-Term** from the **Category** drop-down list.
3. Enter the **Start Date** and **End Date** for the half-term holiday in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.
4. Enter a **Description** for the half-term holiday if required, such as **Autumn Half-Term**. This description appears in the School Diary.
5. Click the **OK** button to add the half-term holiday.
6. Repeat steps 1 to 5 for both the Spring and Summer half-term holidays.



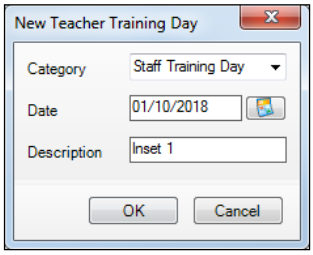
7. Click the **Next** button to display the **Define teacher training days** page.

Defining Teacher Training Days

The **Define teacher training days** page is used to enter any training days where pupil/students will not be attending school. It is advisable to enter any known INSET days at this point. Alternatively, they can be added later via the School Diary (**Focus | School | School Diary**).

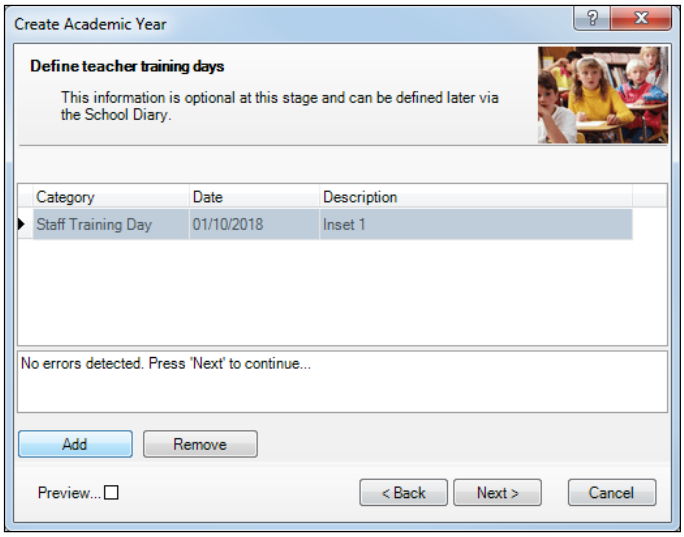


1. From the **Define teacher training days** page, click the **Add** button to display the **New Teacher Training Day** dialog.



2. Select **Staff Training Day** from the **Category** drop-down list. If the required category name does not exist, enter the name manually.
3. Enter the **Date** of the training day in dd/mm/yyyy format or click the **Calendar** button and select the date.
4. Enter a relevant **Description** if required, e.g. `INSET 1`, to ensure that the type of training can be identified. The description appears in the School Diary.

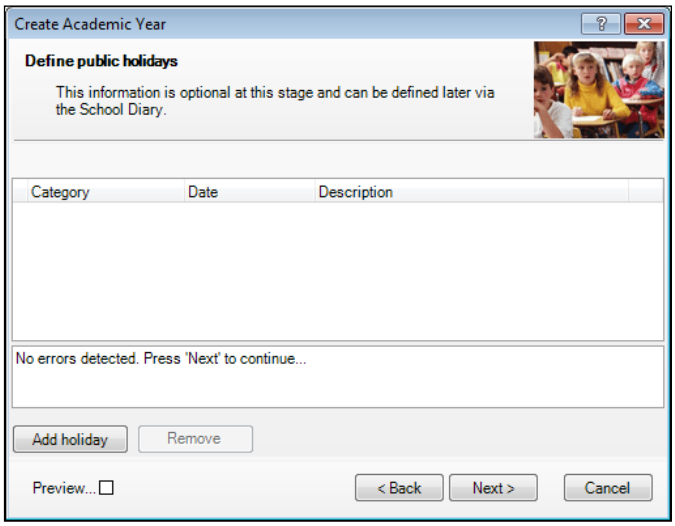
5. Click the **OK** button to add the teacher training day. Repeat for any other required teacher training days.



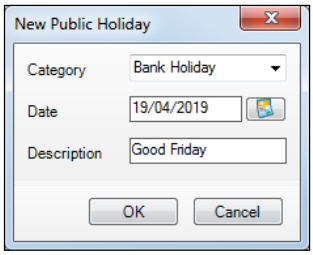
6. Click the **Next** button to display the **Define public holidays** page.

Defining Public Holidays

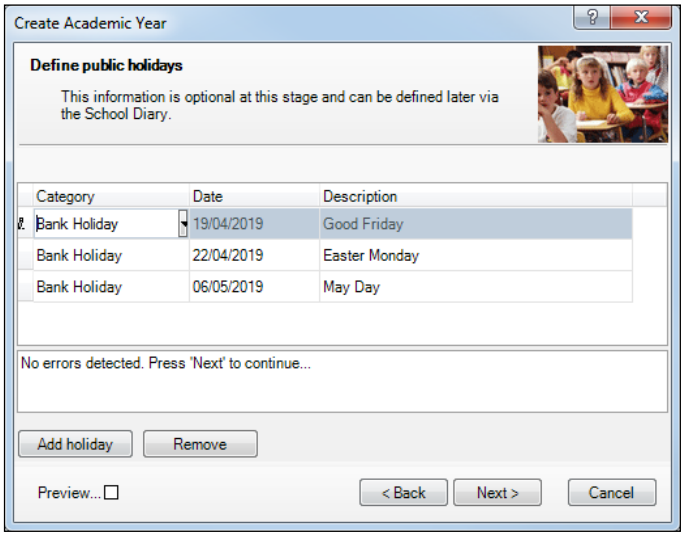
In addition to other dates during term time, you will also need to specify any public holidays, such as Bank Holidays, that occur during term time.



1. From the **Define public holidays** page, click the **Add holiday** button to display the **New Public Holiday** dialog.



2. Select **Bank Holiday** from the **Category** drop-down list. If the category name does not exist, enter the name manually.
3. Enter the **Date** of the public holiday in dd/mm/yyyy format or click the **Calendar** button and select the required date.
4. Enter a relevant **Description**, such as `Good Friday`. This description appears in the School Diary.
5. Click the **OK** button to add the public holiday. Repeat this process for all public holidays throughout the academic year.

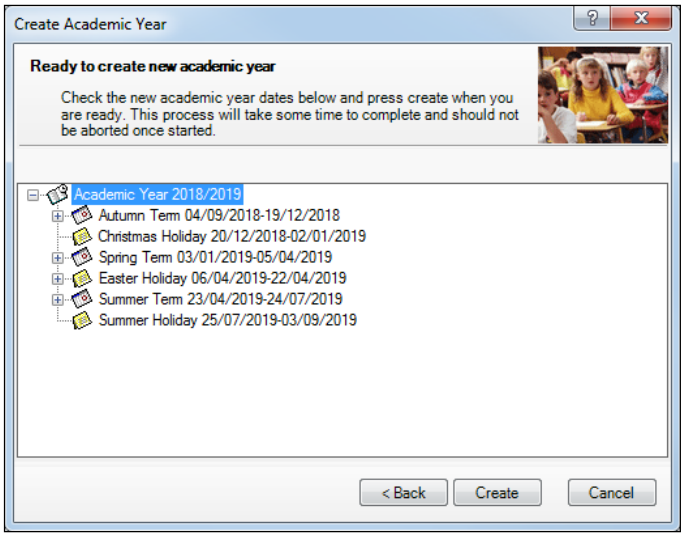


6. Click the **Next** button to display the **Ready to create new academic year** page.

Creating the New Academic Year

Whilst it is not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. This is because a large amount of processing resource is required to create an academic year.

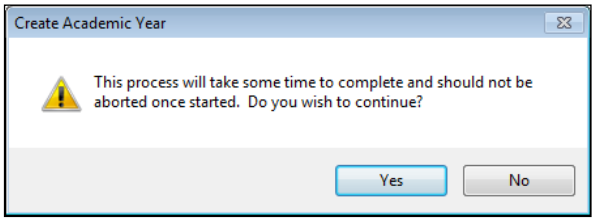
Please be aware that this process may take a long time because the system creates attendance records for the new year.



1. A summary of the data entered is displayed on the **Ready to create new academic year** page. The detail for each term can be expanded to display its public holidays, teacher training days, etc. by clicking the applicable **+** icon. You are strongly advised to check this information carefully for any errors or inaccuracies.

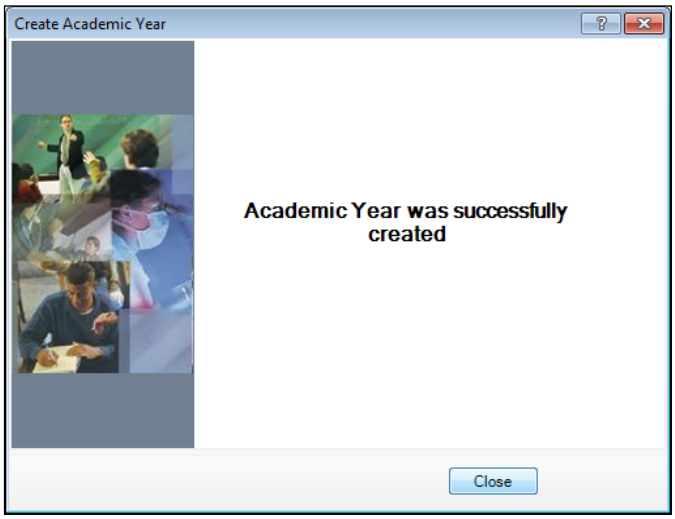
   Once you are sure that the information is correct, click the **Create** button to create the new academic year. If there are any anomalies in your settings, you are asked to confirm whether you wish to proceed or review your settings. If you are certain the data is correct, you can proceed.

   The following warning message is displayed:

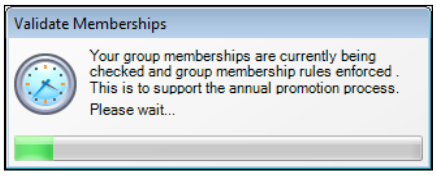


   Progress is displayed via a progress indicator at the bottom of the wizard.

Once complete, the final page of the wizard is displayed:



2. Click the **Close** button to close the wizard and complete the process.
3. It is recommended that once you have created an academic year, you validate group memberships by selecting **Tools | Validate Memberships**, which displays the following page.



Completed

Setting up the New Academic Year's Pastoral Structure

The new academic year's pastoral structure is set up automatically when the new academic year is created and is based on the current academic year's structure. Therefore, you must ensure that a new academic year has been created before proceeding with the instructions in this section.

There may be occasions when the pastoral structure of the new academic year needs to be different from the current structure. For example, you may wish to:

- add additional registration group/classes, where pupil/student numbers have increased.
- merge registration group/classes, where pupil/student numbers have decreased.
- add a new year group, e.g. where a Nursery has been introduced in your school.
- change class names.

NOTES: It is not essential to assign teachers to registration group/classes at this stage. This can be done when the information is known, but must be done before the start of the academic year so that Attendance records are not affected.

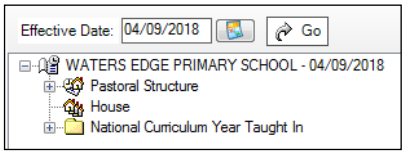
If you want teachers to be promoted with their pupil/students in the next academic year, this can be achieved as part of the pastoral promotion process (please see Setting up the Promotion Mapping for the New Academic Year *on page* 43*).*

If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection (please see Adding Intake/Admission Groups *on page* 32*).*

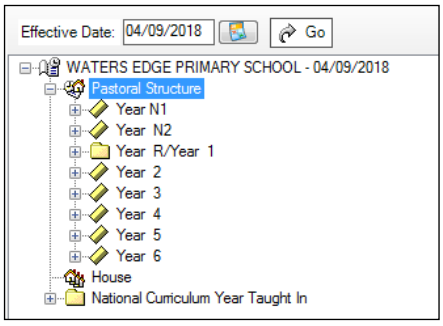
Opening the Structure of the New Academic Year

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

***IMPORTANT NOTE:** To ensure that changes are being made for the next academic year rather than the current academic year, ensure that the start date of the next academic year is displayed in the **Effective Date** field.*



2. The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information.

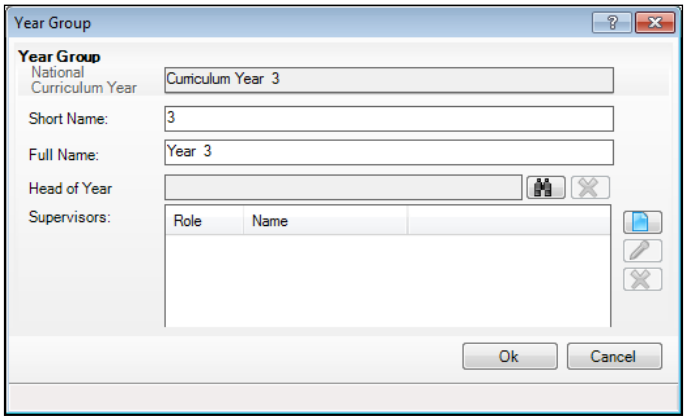


***IMPORTANT NOTE:** If you change the **Effective Date**, you must click the **Go** button to refresh the display.*

3. The full structure can be viewed by clicking the **+** or **-** icons to expand or contract the display.

Checking National Curriculum Years

Please ensure that the National Curriculum year associated with each year group is correct. This can be achieved by right-clicking each year group and selecting **Properties** from the pop-up menu to display the **Year Group** dialog. The **National Curriculum Year** associated with the year group is displayed.



☐ **Completed**

Adding New Year Groups

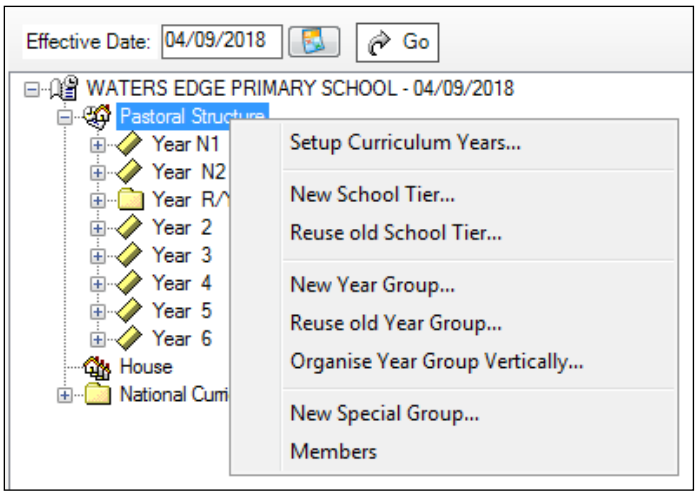
If an additional year group is required, e.g. a Nursery has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection.

> *NOTE: Schools that have a Nursery and admit pupil/students into the Nursery later on in the academic year, e.g. in January, may benefit from creating either an N1 or N2 year at this point. This enables pupil/students to be assigned to the appropriate National Curriculum year when they join the school. This ensures the accuracy of a School Census return.*

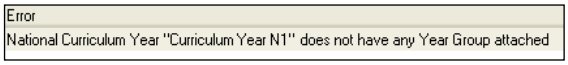
This process is unlikely to be required. If you do not intend to add any new year groups, please proceed to *Adding Classes (Registration Groups)*.

1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *19*).

*NOTE: If you are adding a year group because you are extending the range of years, you will also need to set up a National Curriculum year. This is achieved by right-clicking the **Pastoral Structure** item in the navigation tree, selecting **Setup Curriculum Years** then selecting the required curriculum year check box.*

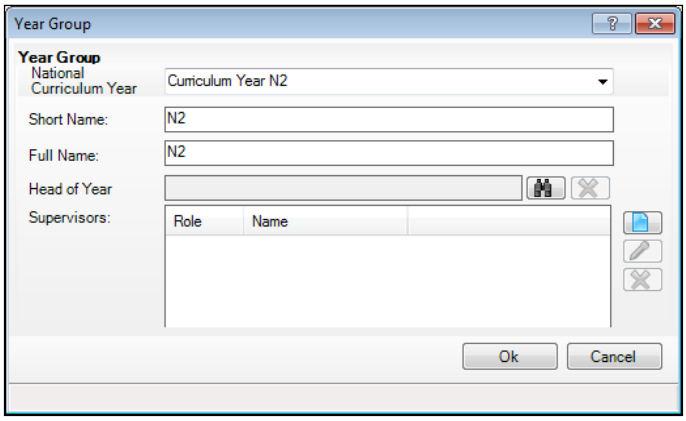


Errors are displayed at the bottom of the screen until years and classes have been added (as shown in the following graphic).



NOTE: Once a National Curriculum year has been created, it cannot be deleted. Therefore, please ensure that the correct NC year is added.

2. Right-click the **Pastoral Structure** item in the structure and select **New Year Group** from the pop-up menu to display the **Year Group** dialog.



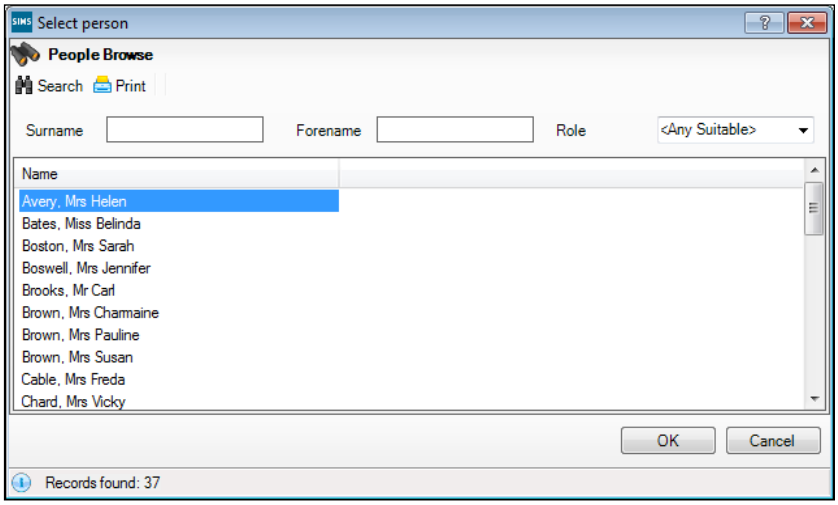
3. Select the **National Curriculum Year** with which the year group will be associated, from the drop-down list.
4. Enter a **Short Name** and a **Full Name** for the year group.

The **Full Name** (up to 32 characters) is used throughout SIMS to identify the year group (e.g. **Year 2**). The **Short Name** (up to 10 characters) is used for column headings in reports (e.g. **Y2**). Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of six characters. Both names must be unique within the school.

5. Select the **Head of Year** if required, by clicking the **Browser** button to display the **Select person** dialog. This is optional (as many Primary schools do not have Heads of Year) and/or can be done at a later date if preferred. If you do not intend to add a Head of Year, please proceed to step 8.

Browser button

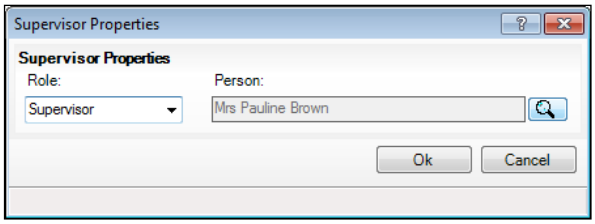
6. Enter a **Surname** and/or **Forename** then click the **Search** button. Alternatively, leave the fields blank to search for all staff.



Highlight the required person and click the **OK** button to select them as the Head of Year and return to the **Year Group** dialog.

7. Select a **Supervisor** for the year group (if required) by clicking the **New** button to display the **Supervisor Properties** dialog. This is optional and/or can be done at a later date if preferred. If you do not intend to add a Supervisor, please proceed to step 8.

New button



- Select the **Role** from the drop-down list then click the **Browser** button adjacent to display the **Select person** dialog.

> *NOTE: By default, the **Role** drop-down list displays **Supervisor** and **Pastoral Manager**.*

- Search for, and select, the required supervisor in the same way as the Head of Year. Click the **Ok** button on the **Supervisor Properties** dialog to set the selected person as the supervisor and return to the **Year Group** dialog.

8. Click the **Ok** button on the **Year Group** dialog to add the year group. You must now add applicable classes, as described in the next section.

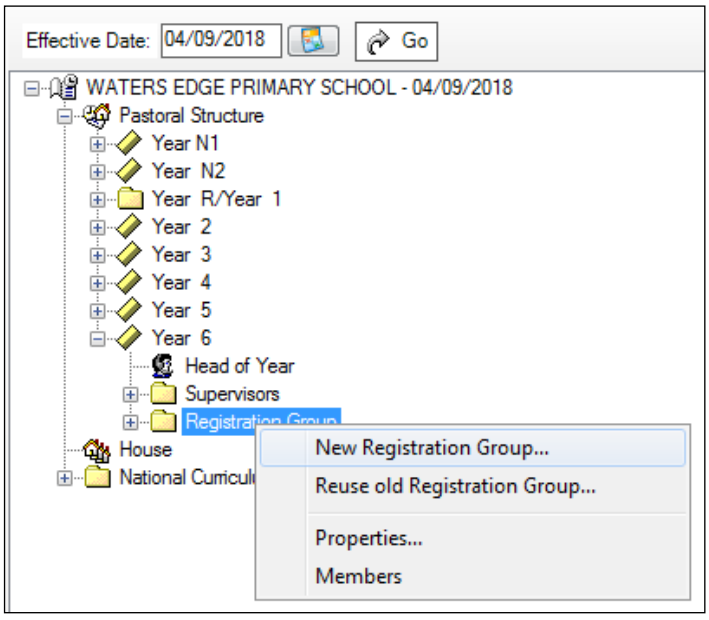
☐ **Completed**

Adding Classes (Registration Groups)

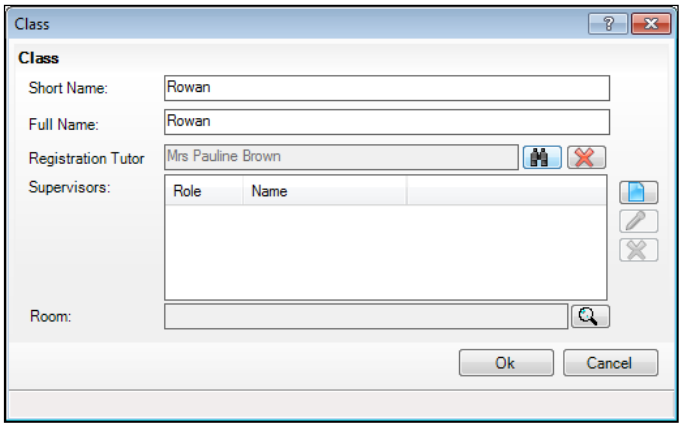
You are strongly advised to check whether the name you intend to use for a new class has not previously been used. This is achieved by expanding the Pastoral Structure and appropriate year group then right-clicking the **Registration Group** folder and selecting **Reuse Old Registration Groups** from the pop-up menu to display the **Reuse old Registration Group** dialog. This dialog lists any classes that have previously been deleted.

If the required name is listed, highlight it and click the **OK** button to re-use the class rather than create a new class with the same name. If the required name is not listed, click the **Cancel** button then create a new class as follows.

1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *19*).
2. Expand the year group to which you wish to add the class by clicking the adjacent **+** icon.



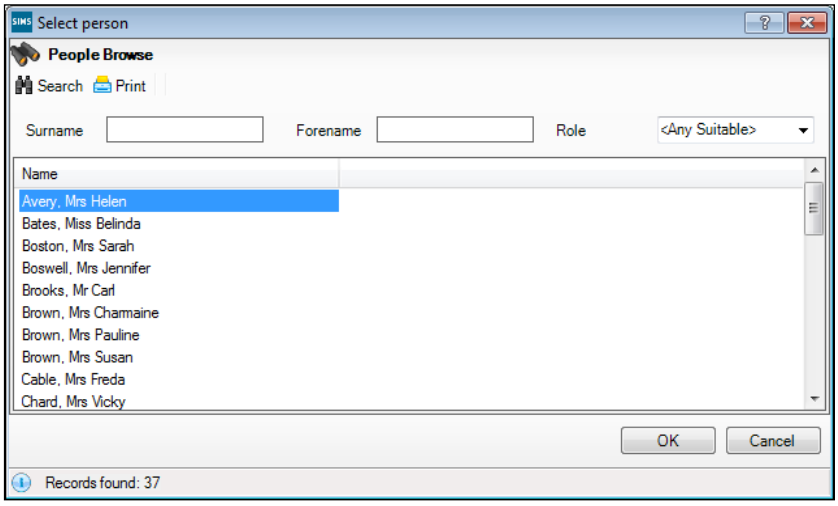
3. Right-click the **Registration Group** folder and select **New Registration Group** from the pop-up menu to display the **Class** dialog.



4. Enter a **Short Name** and **Full Name** for the new class.

   The **Full Name** (up to 32 characters) is used throughout SIMS to identify the class, e.g. `Rowan`. The **Short Name** (up to 10 characters) is used for column headings in reports. Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of six characters. Both names must be unique within the school.

5. Add the **Registration Tutor** by clicking the **Browser** button to display the **Select person** dialog.

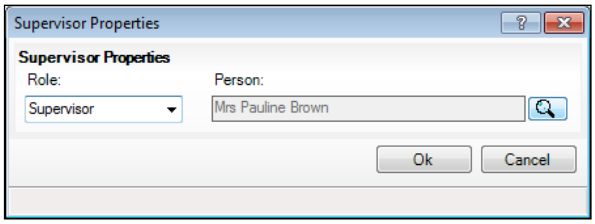


6. Enter a **Surname** and/or **Forename** then click on the **Search** button. Alternatively, leave the fields blank to search for all staff.

7. Highlight the required person and click the **OK** button to select them as the Registration Tutor and return to the **Class** dialog.

8. Select a **Supervisor** for the class (if required) by clicking the **New** button to display the **Supervisor Properties** dialog. This is optional and can be done at a later date if preferred. If you do not intend to add a Supervisor, please proceed to step 9.

New button

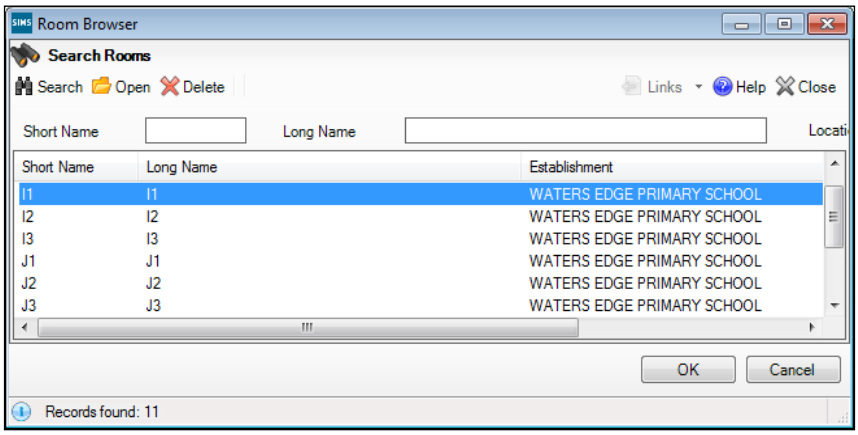


- Select the **Role** from the drop-down list then click the **Browser** button adjacent to the **Person** field to open the **Select Person** browser. Select the required person in the same way as for the Registration Tutor.

  *NOTE: By default, the **Role** drop-down list displays **Supervisor**, **Pastoral Manager** or **Joint Main Supervisor**.*

- Click the **Ok** button on the **Supervisor Properties** dialog to select the person as the Supervisor for the class return to the **Class** dialog.

9. Select the **Room** that will be used by this class (if required) by clicking the **Browser** button to display the **Room Browser** dialog.



- Enter either the **Short Name** or the **Long Name** of the room then click the **Search** button. Alternatively, leave all of the fields blank to search for all rooms.
- Highlight the required room then click the **OK** button to return to the **Class** dialog.

10. Click the **OK** button to create the class.

Additional Resources:

Adding Rooms tutorial in the SIMS **Documentation Centre**

Adding/Editing Rooms chapter in the *Setting Up and Administering SIMS* handbook

☐ **Completed**

Important Note on Editing Class Names

There may be occasions when you wish to rename classes in either the current or next year's pastoral structure. This is sometimes required by schools that name their classes based on teacher's initials and the teacher then leaves the school.

It is essential that you do not just rename the class. This is because the class name is recorded in the class history. If you change the name, the change is made throughout the history of that class, so the class is recorded as always having been named according to the name change.

*NOTE: To ensure that you do not rename a class to a name that already exists, right-click the required **Registration Group** folder in the pastoral structure and select **Reuse Old Registration Groups**. Any classes that have previously been deleted are displayed. If the required name is listed, highlight it then click the **OK** button to re-use it rather than create a new class with the same name. If the required name is not listed, create a new class.*

Please see the following two examples:

Example 1:

A class is currently called **4AB** after a teacher named Anita Brown. At the end of the current academic year, Anita will move up with her class, which becomes **5AB**.

If you rename **4AB** to **5AB** then all the pupil/students in **4AB** will be recorded as always having been in **5AB** because the history is also amended.

In this circumstance, all you need to do is to create a new class called **5AB** in the pastoral structure for the new academic year (e.g. 2018/2019) and set the promotion mapping to promote to this class at the start of the new academic year. All pupil/students in **4AB** will move up to **5AB** at the start of the new academic year (please see *Setting up the Promotion Mapping for the New Academic Year* on page *43*).

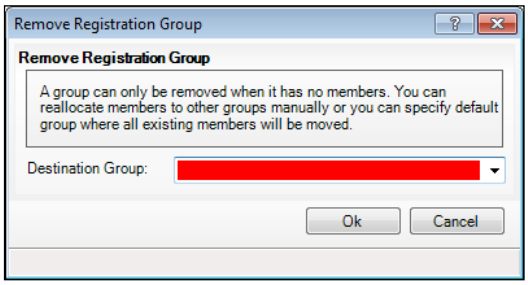
Example 2:

A class is currently called **4SL** after a teacher named Sonia Lovell. Sonia is leaving and will be replaced by Andrew White during the same academic year.

If you rename **4SL** to **4AW** then all the pupil/students in **4SL** will be recorded as always having been in **4AW** because the history is also amended.

To correctly change a class name:

1. Add a new class (please see *Adding Classes (Registration Groups)* on page *23*) in the current pastoral structure (e.g. 2018/2019) labelled with the new class name (e.g. **4AW**).
2. Delete the old class by right-clicking the required class name and selecting **Remove** from the pop-up menu to display the **Remove Registration Group** dialog.



3. Select the newly created class (e.g. **4AW**) from the **Destination Group** drop-down list. All members from the old class will be transferred to the new class.
4. Click the **Ok** button to delete the class and transfer the pupil/student memberships.
5. Click the **Save** button to save the changes.

General Advice

The responsibility for defining the naming convention of classes lies with the school. However, you should note that if you use teacher initials, you must carry out the previous instructions each time a teacher leaves or if there are any teaching changes that result in a class name change, e.g. teachers change class or years mid-year. In addition, you will need to create new classes based on the teacher initials for each new academic year as described in Example 1. If you wish to use teacher initials, it is far easier if you do not precede the class name with the year, e.g. use **SL** rather than **4SL**.

Primary schools may wish to use classes named after trees, colours, animals, etc. An alternative is to name classes by year and a single initial (not based on a teacher's name) such as **3A**, **3B**, etc. that remain static year on year.

Changing Year Group Horizontal/Vertical Structures

There may be occasions where you want the pastoral structure for the new academic year to be different to that of the current year. For example:

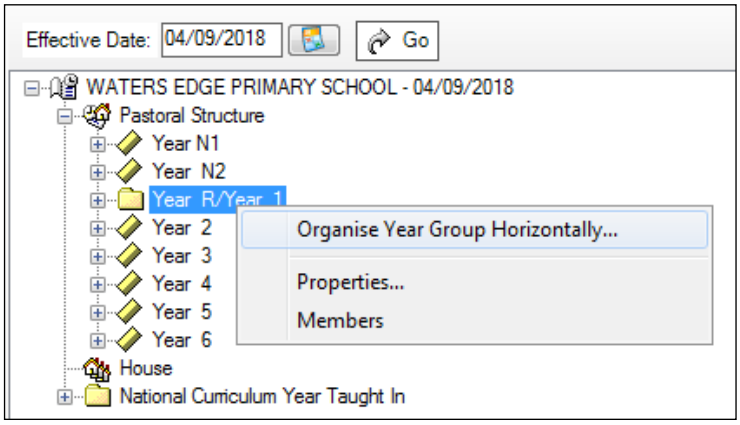
- As a consequence of falling pupil/student numbers. This may require you to change from a horizontal to a vertical structure to enable pupil/students from mixed year groups to be taught in the same class.
- As a consequence of increasing pupil/student numbers. This may require you to change from a vertical to a horizontal structure to enable pupil/students from the same year to be taught in the same class.

- As a consequence of a change in pupil/student numbers across the years, e.g. a low birth rate one year, then a high birth rate two years later. This may require you to change to a combined horizontal and vertical structure.

Changing from a Vertical to a Horizontal Structure

This process may be required if, for example, your pupil/student numbers have increased. This would enable previously merged years, such as Nursery/Reception (vertically structured) to be split into two separate years (horizontally structured) because there are now sufficient pupil/students from the same year group to be taught in one class.

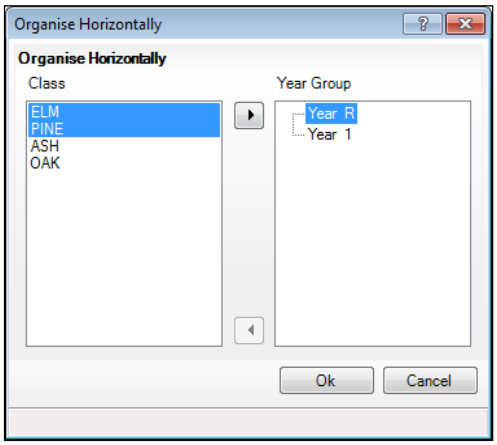
1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *19*).
2. Expand the **Pastoral Structure** heading by clicking the **+** icon. Vertically organised year groups can be identified by their names, separated by a forward slash, e.g. **Nursery/Reception**.



3. Right-click the vertically organised year group and select **Organise Year Group Horizontally** from the pop-up menu to display the **Organise Horizontally** dialog.

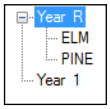
   This dialog enables you to determine the class(es) that should be attached to each year.

4. In the **Class** panel, highlight the class(es) you wish to attach to a year (hold down the **Ctrl** key and click the class names to highlight more than one class) then click the required year group in the **Year Group** panel.

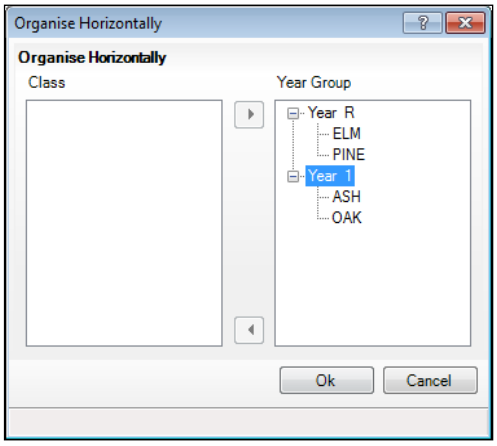


In the previous example, **ELM** and **PINE** are being attached to the Reception (**Year R**).

5. Click the right arrow button in the centre of the dialog to attach the selected class(es) to Reception (**Year R**). The class(es) are moved under the **Year R** heading, as shown in the following example.



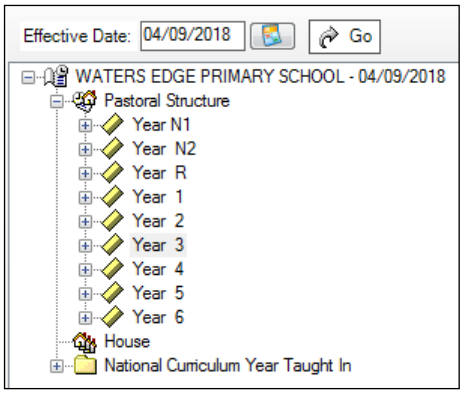
6. Repeat steps 4 and 5 for all the remaining classes in the **Class** panel.



> *NOTE: Each class must be attached to a single year group and therefore, the **Class** panel must be empty before you can complete the process.*

7. Click the **Ok** button to save the details.

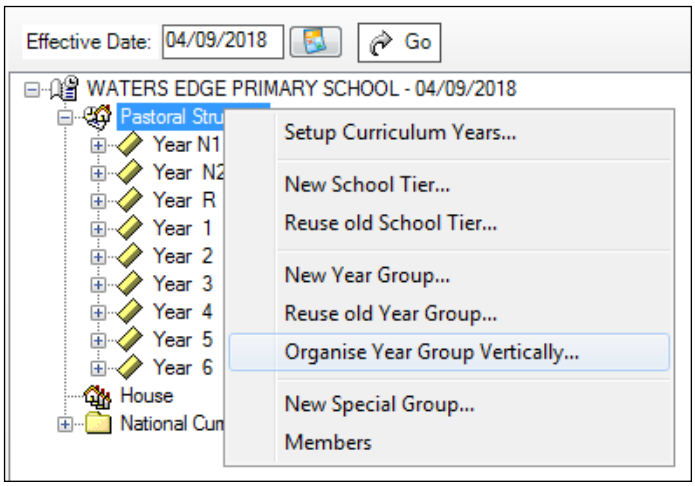
The pastoral structure should now show the two previously merged years as separate years, as shown in the following example.



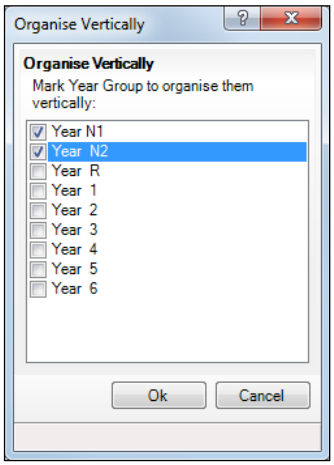
Changing from a Horizontal to a Vertical Structure

This process may be required if, for example, your pupil/student numbers have decreased. This could allow previously separate years, such as Nursery and Reception (horizontally structured) to be merged into a single year (vertically structured) because there are insufficient pupil/students from the same year group to be taught in one class.

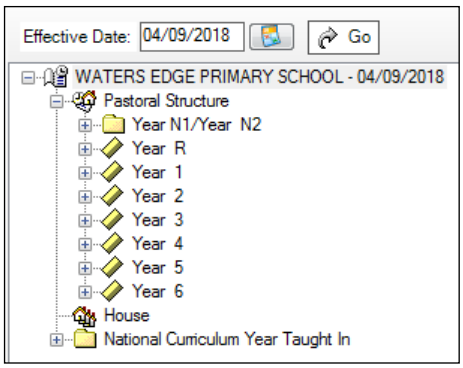
1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *19*).



2. Right-click **Pastoral Structure** and select **Organise Year Group Vertically** from the pop-up menu to display the **Organise Vertically** dialog.



3. Select the check boxes adjacent to the **Year N2** and **Year R** (Nursery and Reception years) you wish to merge into a vertical structure then click the **Ok** button. In the previous example, Nursery and Reception are being merged into a vertical structure.
4. Click the **Ok** button to merge the selected years, which are then displayed in the pastoral structure separated with a **/**, as shown in the following example.



Saving the Amended Pastoral Structure

Once the required changes have been made to the pastoral structure, click the **Save** button to save the structure. This may take some time depending on the number of changes that have been made.

☐ **Completed**

Adding Intake/Admission Groups

Intake and admission groups are used to maintain lists of the applicants who have registered an interest in being taught at your school. It is now possible to create an intake group containing one or more admission groups. For example, an intake group consisting of separate admission groups for those joining in Autumn, Spring and Summer terms might be set up for your Nursery.

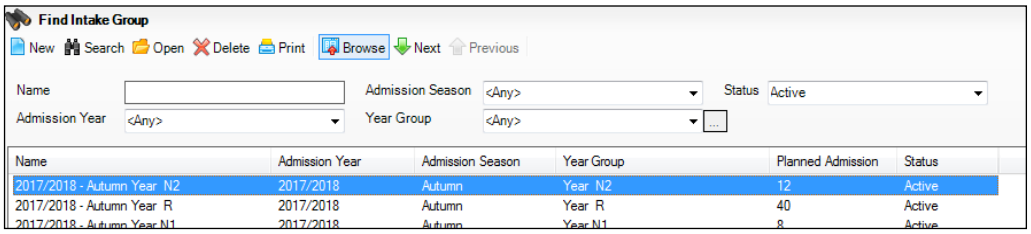
IMPORTANT NOTE: *Please ensure that the* ***Date of Admission*** *lies within the new academic year. We recommend that the date of admission is the day on which the applicants will actually arrive in school, i.e. not a teacher training day. However, please check with your Local Authority for advice on the correct date to use if you are unsure.*

If you have previously created admission groups with an incorrect ***Date of Admission****, amending the date also amends the* ***Date of Admission*** *for every applicant who is a member of the group, preventing the need to edit them individually.*

If you need to add a new year group but have already created intake/admission groups, you will need to create new intake/admission groups after the additional year group has been added and then move any existing members to the new intake/admission group(s).

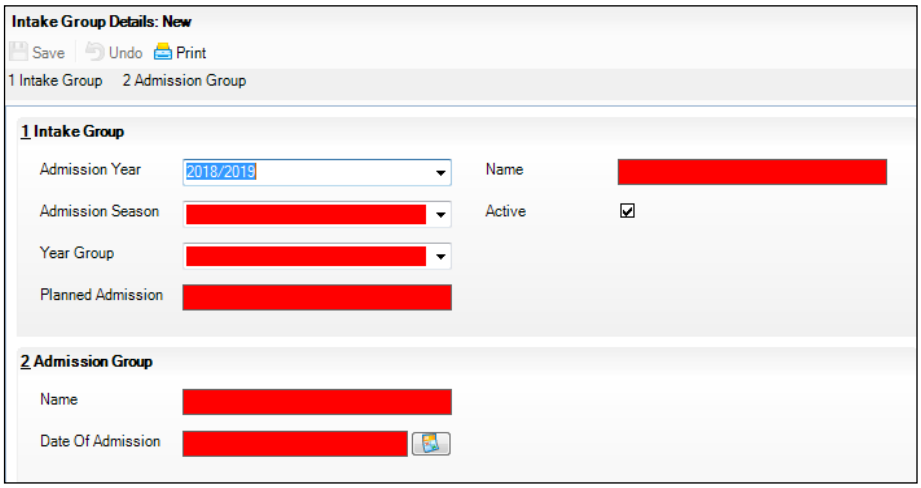
This is also a good time to delete or make inactive any unwanted admission groups. Detailed instructions on adding and maintaining admission groups can be found in the appropriate *Admissions* handbook.

1. Select **Routines | Admission | Admission Groups | Setup** to display the **Find Intake Group** browser.

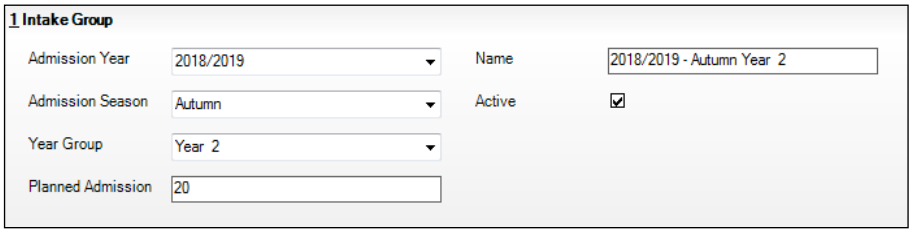


2. Carry out a search to ensure that the intake group does not already exist.
3. Click the **New** button to display the **Intake Group Details** page. Mandatory fields are highlighted in red. The page will look slightly different depending on whether you have set up SIMS to allow multiple admission groups to be added.

In addition, Own Admission Authority schools who have applied a Basic or Full Admissions Licence will see two additional fields (**Admission Policy** and **Numbers to Rank**).



4. In the **Intake Group** panel, select the **Admission Year** to which the intake group relates (e.g. 2018/2019) from the drop-down list (this defaults to the current academic year).
5. Select the required **Admission Season** (**Autumn**, **Spring** or **Summer**) or, if the intake group does not apply to a specific season, select **Integrated** from the drop-down list.



6. Select the required **Year Group** from the drop-down list.
7. Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field.
8. Only Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can select a previously defined admissions policy from the **Admission Policy** drop-down list. Select a policy, if required.
9. Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can enter the number of applications that should be ranked in the **Numbers to Rank** field. By default, all applications in an intake are ranked. If you have agreed with your Local Authority that you will rank only a certain number of applications, enter the agreed number in this field.
10. If you press the **Tab** key to move to the **Name** field or click in this field, a default name is supplied for the intake group, based on the **Admission Year**, **Admission Season** and **Year Group**, e.g. **2018/2019 – Autumn Year 1**. The default name can be amended, if required.

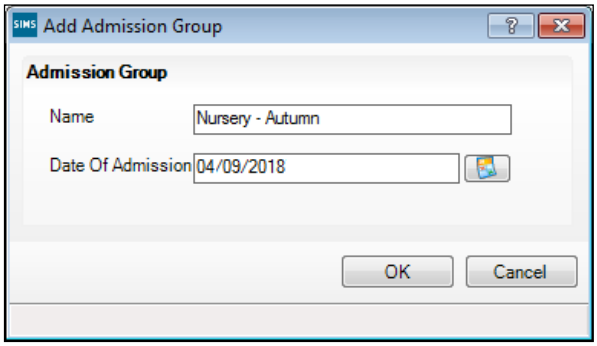
11. The **Active** check box is selected by default and indicates that the intake group is available for use. Deselect this check box only if you wish to create intake groups that will be used at some point in the future (they will not be displayed in the **Find Intake Group** browser by default).

Adding One or More Admission Groups

This section is applicable if SIMS is set up to allow the use of multiple admission groups and describes how to add one or more admission groups to an intake group. If you are not sure, please refer to the graphics in the previous section. If the second panel is labelled **Admission Groups**, SIMS is set up to allow multiple admission groups. If the second panel is labelled **Admission Group**, SIMS is not set up to allow multiple admission groups.

If SIMS is not set up to use multiple admission groups, please proceed to *Adding an Admission Group (Multiple Groups Not Enabled)*.

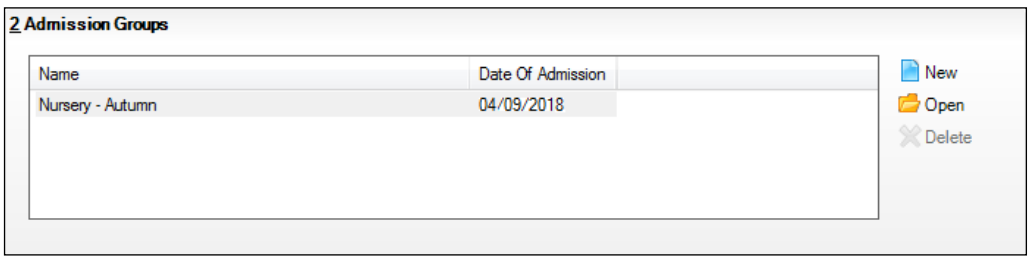
1. From the **Admission Groups** panel, click the **New** button to display the **Add Admission Group** dialog.



2. Enter a **Name** for the admission group together with the **Date Of Admission**. Alternatively, click the **Calendar** button and select the required date.

> ***IMPORTANT NOTE:*** *Please ensure that the* ***Date Of Admission*** *falls within the applicable academic year. We recommend that the date of admission is the day that the children will actually arrive in school, i.e. not a teacher training day. However, if you are unsure please check with your Local Authority for advice on the correct date to use.*

3. Click the **OK** button to add the admission group and return to the **Intake Group Details** page.
4. If any further admission groups are required, click the **New** button in the **Admission Groups** panel and repeat steps 2 and 3.



5. Click the **Save** button to create the intake and admission groups.

   Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

Adding an Admission Group (Multiple Groups Not Enabled)

1. Clicking in the **Name** field provides a default name for the group, which can be overtyped as required.

2. Enter the **Date Of Admission** for the group.
3. Click the **Save** button to create the intake and admission group.

   Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

☐ **Completed**

Importing Admissions and Transfer Files (ATF)

If your Local Authority has provided you with an ATF file, this should have been imported around March time, as described in the appropriate *Admissions* handbook. Any additional pupil/students can be imported via CTF, as described in the following section.

Importing Common Transfer Files (CTFs)

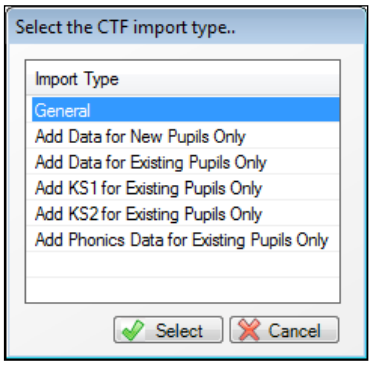
This section provides a summary of the steps required to import a CTF.

Import any CTFs that have not yet been imported. Pupil/Students with CTFs can be imported into an admission group or directly on-roll.

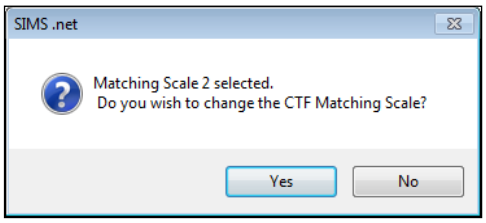
If any of the pupil/students in the CTF already exist in the system, any blank fields in their record are updated with data from the CTF. Any existing data is not overwritten, as it is deemed to be the most up-to-date information. Any such information is highlighted in the Exception Log that is displayed at the end of the import process.

Appropriate intake/admission groups must be created before you can import CTF files (please see *Adding Intake/Admission Groups* on page *32*).

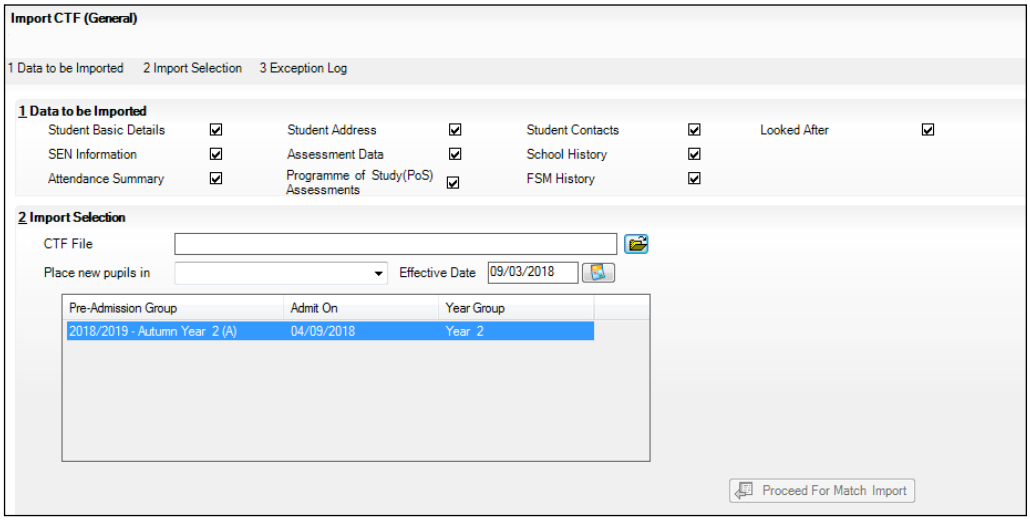
1. Select **Routines | Data In | CTF | Import CTF** to display the **Select the CTF import type** dialog. This dialog varies, depending on your school phase.



2. Highlight the required CTF import type then click the **Select** button to display a message asking you to confirm whether you wish to change the matching scale.



For detailed instruction on importing a CTF file and using the CTF Matching utility, please refer to the *Using the CTF Matching Screen* mini guide or to the *Importing and Exporting CTFs* chapter of the *Managing Pupil/Students* handbook.



3. In the **Data to be Imported** panel, indicate the data items you wish to import from the CTF by selecting the appropriate check boxes.

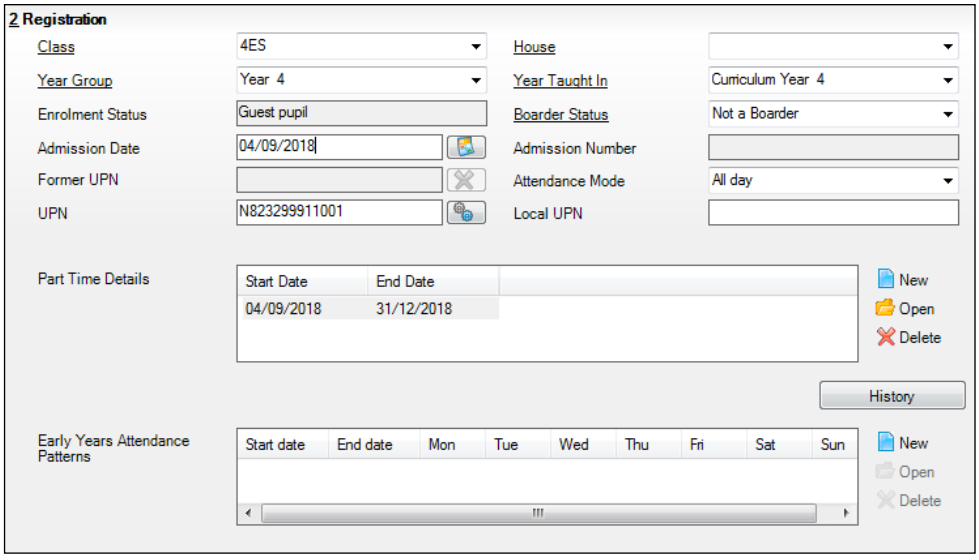
4. In the **Import Selection** panel, browse to the location of the CTF by clicking the **Open** button adjacent to the **CTF File** field to display the **Select Import File** dialog. Navigate to the required location, highlight the CTF then click the **Open** button to return to the **Import to CTF** page.
5. Select **Pre-Admission** from the **Place new pupils** in drop-down list to import the pupil/student into an admission group. The **On-roll** option is also available, but it is unlikely that September admissions would be imported directly on-roll.
6. Click the **Import CTF** button to start the import. Details of any errors are displayed in the Exception Log at the bottom of the **Import CTF** page.
7. Once you have finished importing the CTF, edit the details of the imported pupil/students as required.

☐ **Completed**

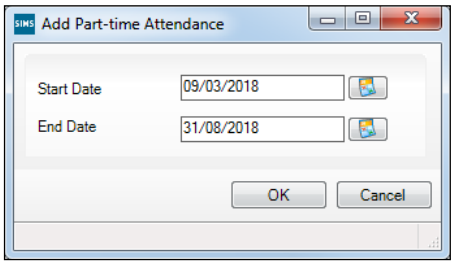
Checking Dates for Part-Time Pupil/Students

To ensure that pupil/students who are no longer part-time are showing correctly in Attendance, it is necessary to enter an end date in their part-time details in SIMS and to change their attendance mode to all day. This is mostly relevant to Nursery schools (or schools with nursery age children). However, any pupil/student can be marked as part-time if their attendance is anything less than 10 sessions per week.

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** then select the required pupil/student from the **Find Student** browser.
2. Click the **Registration** hyperlink to display the **Registration** panel.



3. Check or amend the **End Date** in the **Part Time Details** table for any part-time pupil/students who will no longer be part-time, by clicking the **Open** button to display the **Edit Part-time Attendance** dialog.



4. Add or edit the **End Date** as required then click the **OK** button. The **End Date** is then displayed in the **Part Time Details** table.
5. Select **All day** from the **Attendance Mode** drop-down list.
6. Click the **Save** button to save any changes.

Once you have determined which pupil/students are part-time (i.e. which pupil/students are AM only or PM only), you need to define the part-time sessions and dates for the AM/PM groups for all or part of the coming year. Running this routine will also ensure that pupil/students who are no longer part-time will have their attendance records amended accordingly (please see *In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes* on page *69*).

☐ **Completed**

Recording Leavers

This section provides a summary of the steps required to record leaver information in SIMS.

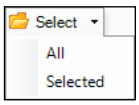
The facility to record leavers enables accurate records to be kept of pupil/students after they have left the school. During the Summer term you will need to mark most, or all of the pupil/students as leaving on the same day. You should only mark pupil/students as leavers if you are sure they are leaving, e.g. Year 6 pupil/students moving on to Secondary school.

IMPORTANT NOTES: *It is essential that you do not record leavers by removing their date of admission as this affects all historical data relating to that pupil/student.*

If someone who was a leaver subsequently returns, please ensure that you re-admit them – do not simply remove the date of leaving as this will affects the history (unless they had a date of leaving, but did not actually leave, i.e. changed their minds).

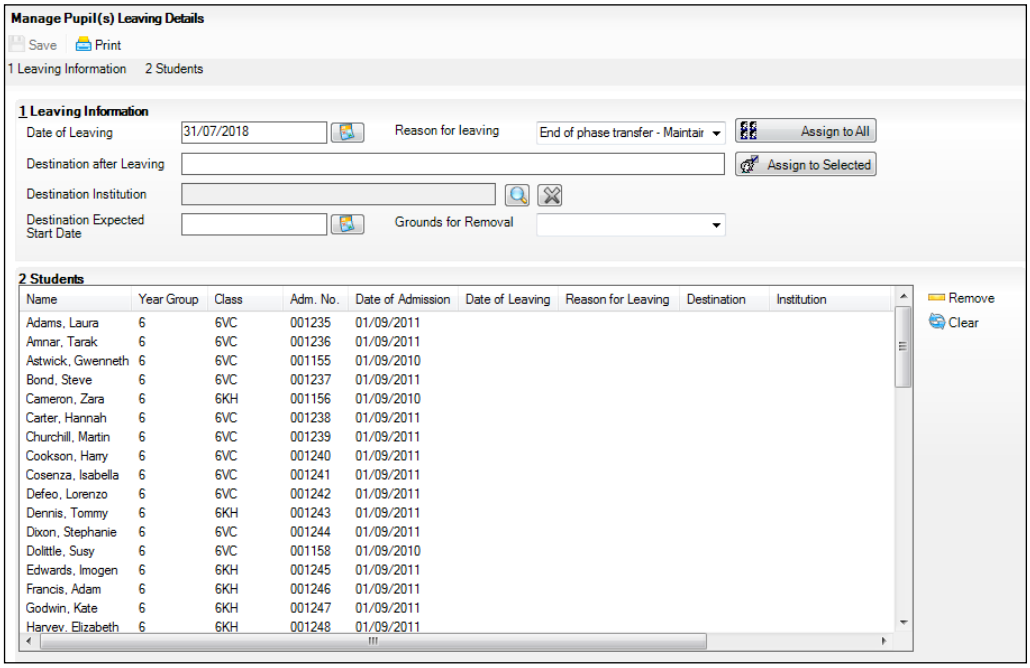
To ensure that information required for statutory returns, such as the School Census, is accurate and up-to-date, it is recommended that you check that all leavers have at least the minimum statutory information recorded before making them a leaver, e.g. Ethnicity.

1. Select **Routines | Pupil** (or **Student**) **| Leavers** to display the **Find Student(s)** browser.
2. Search for the required pupil/student then double-click their name to display the **Manage Student(s) Leaving Details** page.
3. If you wish to assign a group of pupil/students as leavers, search on the appropriate **Year** or **Reg Group** by selecting from the appropriate drop-down lists. Highlight the required pupil/students using any of the following methods:
   - To select all the pupil/students displayed in the browser, select **All** from the **Select** drop-down menu.



   - To select a group of pupil/students, highlight them using any of the following methods:
     - Hold down the **Ctrl** key and click each pupil/student to be selected.
     - To highlight sequentially listed pupil/students, click the first name in the list, hold down the Shift key then click the last name in the list.
   - Once the required pupil/students have been highlighted, click the **Select** button to add them to the **Students** panel.

   The selected pupil/students are then transferred to the **Students** panel.



4. In the **Leaving Information** panel, enter the **Date of Leaving** or click the **Calendar** button then select the required date.
5. Select the **Reason for leaving** from the drop-down list.

6. Enter the **Destination after Leaving**, if required. Alternatively, apply the **Reason for leaving** to one set of pupil/students (as described in the next step) then enter the **Destination after Leaving** for a different, or subset of pupil/students.
7. Search for and select the **Destination Institution**.
8. Select the **Destination Expected Start Date** from the Calendar.
9. Highlight the pupil/students to whom this information applies using the **Ctrl** and **Shift** keys then clicking their names (as described in step 3) then click the **Assign to Selected** button. If the information applies to all the pupil/students in the list, click the **Assign to All** button.
10. If an error has been made, highlight the pupil/student, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
11. To remove a pupil/student from the list, highlight their name then click the **Remove** button.
12. To clear the contents of the **Date of Leaving**, **Reason for Leaving** and **Destination after Leaving** columns in the **Students** panel, highlight the required pupil/students then click the **Clear** button. Re-enter the information as required.
13. Click the **Save** button to save the changes. The selected pupil/students are recorded with a date of leaving on the date specified.

❑ **Completed**

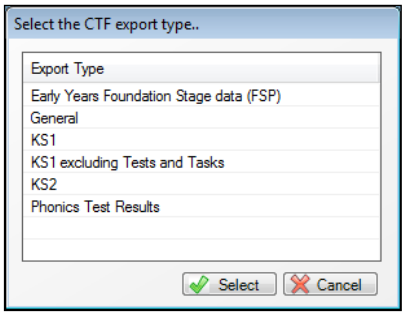
Exporting Common Transfer Files (CTFs)

Common Transfer Files can be created and sent to other schools or Local Authorities.

> *NOTE: Before proceeding, you must have previously added any required **Feeder** and **Destination Schools** via **Tools | Other Schools** and specified the directory into which the CTF export will be saved via **Tools | Setups | CTF**.*
>
> *Please ensure that the relevant pupil/students are given a **Date of Leaving** before exporting the CTF.*

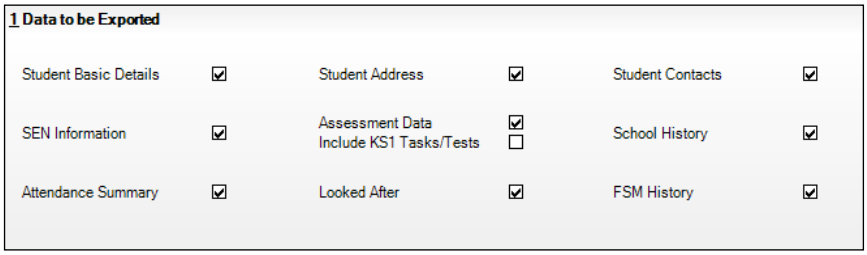
This section provides a summary of the steps required to export a CTF.

1. Select **Routines | Data Out | CTF | Export CTF** to display the **Select the CTF export type** dialog.

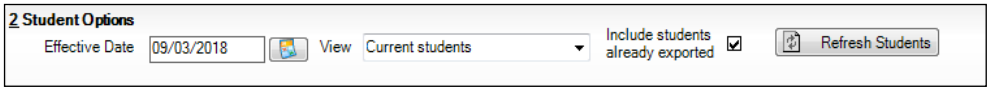


   Highlight the required CTF export type then click the **Select** button to display the **Export CTF** page. The page name is appended with the option selected in the previous dialog. For detailed instruction on exporting a CTF file, please refer to the *Importing and Exporting CTFs* chapter of the *Managing Pupil/Students* handbook.

2. In the **Data to be Exported** panel, ensure that the check boxes relating to the data items you wish to export are selected.

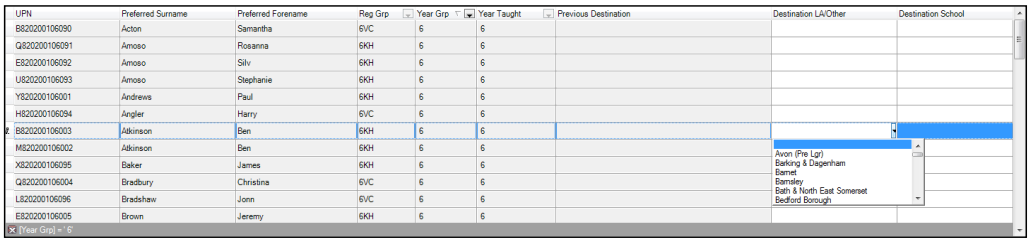


3. Select the status of the pupil/students you wish to include in the CTF file from the **View** drop-down list (e.g. **Leavers this year**) in the **Student Options** panel.

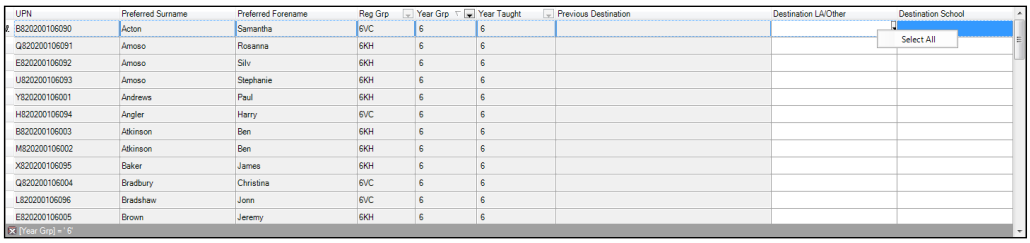


4. If you have already created a CTF file for some of the pupil/students but wish to include them in this CTF, select the check box to include pupil/students already exported in the export file.
5. Click the **Refresh Students** button to update the list of pupil/students displayed based on your selections. You can change the display order by clicking any of the column headings.

6. In most circumstances, a single year group will be selected, such as Year 6. This is achieved by selecting the required year from the **Year Grp** drop-down list as shown in the following graphic.

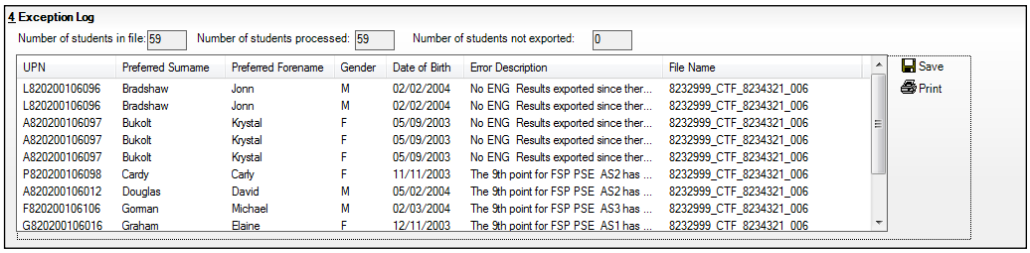


7. Select the **Destination LA/Other** or **Destination School** by clicking in the appropriate cell then selecting from the drop-down list. This can be done on an individual basis or you can select multiple pupil/students as follows:
   - Hold down the **Ctrl** key and click each pupil/student to be selected.
   - To highlight sequentially listed pupil/students, click the first name in the list, hold down the **Shift** key, then click the last name in the list.
   - To select all the pupil/students, right-click anywhere in the table then select **Select All** from the pop-up menu.



8. Click the **Export CTF** button to create the export file.

   After the file has been created, any errors are displayed in the **Exception Log** panel, together with the number of pupil/students in the file, the number processed and the number not exported.



   Any errors must be corrected before the pupil/student can be successfully included in the CTF export file.

9. Navigate to the location of the **CTF Export Directory** (as defined in **Tools | Setups | CTF**) then identify the newly created XML file for export. The CTF can be transferred by a local secure file transfer mechanism, e.g. Secure Access. Please contact your Local Authority if you are unsure how to transfer the CTF.

☐ **Completed**

Setting up the Promotion Mapping for the New Academic Year

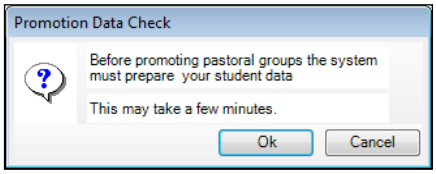
Setting up the promotion paths for the pastoral structure plays a key part in the end of year procedures and ensures that pupil/students move from their current year group and class into the correct year group in the new academic year. This process is used to set the path for year groups and classes, but it is also possible to specify a promotion path for individual pupil/students in case there are any exceptions (please see *Viewing/Setting the Promotion Path for Individual Pupil/Students* on page *47*).

Setting the promotion mapping can be carried out at any point, as the promotion itself occurs at the beginning of the next academic year. However, it must be done before the start of the academic year.

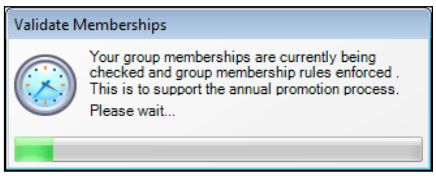
You can repeat the process a number of times until you are happy that all pupil/students have been mapped to the appropriate classes.

> ***BEFORE PROCEEDING:*** *Please check that you have carried out the following:*
>
> - *Recorded any changes to teaching staff (added new teachers and added dates of leaving for any leavers).*
> - *Created the new academic year.*
> - *Amended your pastoral structure as required, such as adding new classes.*

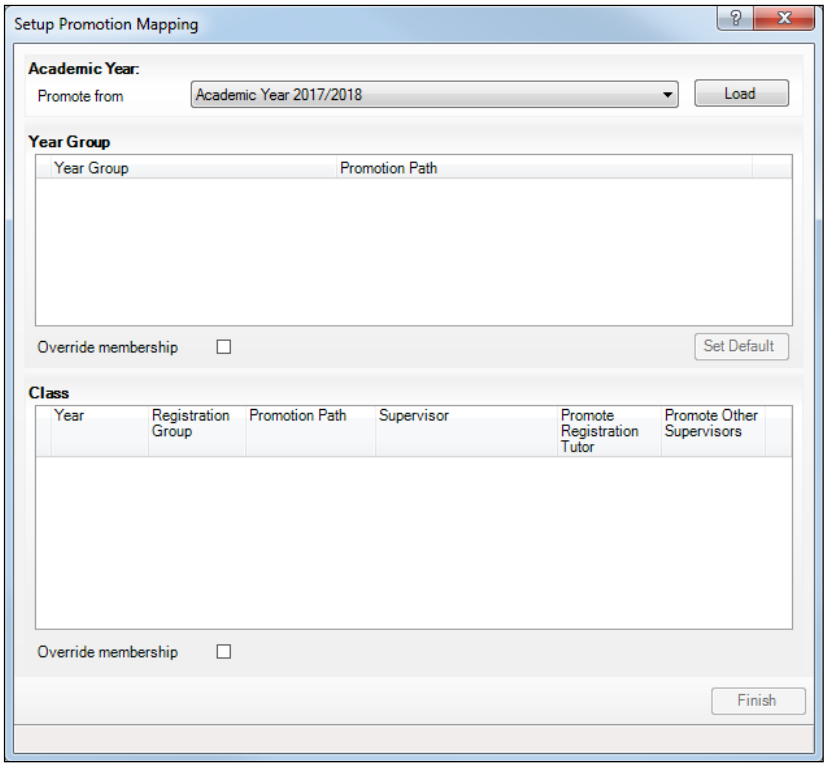
1. Select **Routines | School | Promotion** to display the **Promotion Data Check** dialog. You are advised that pupil/student data needs to be prepared (all current group memberships are checked and confirmed).



2. Click the **Ok** button to display the **Validate Memberships** message dialog, which shows the progress of the validation process.



This process may take some time to complete. Once the validation process is complete, the **Setup Promotion Mapping** dialog is displayed.

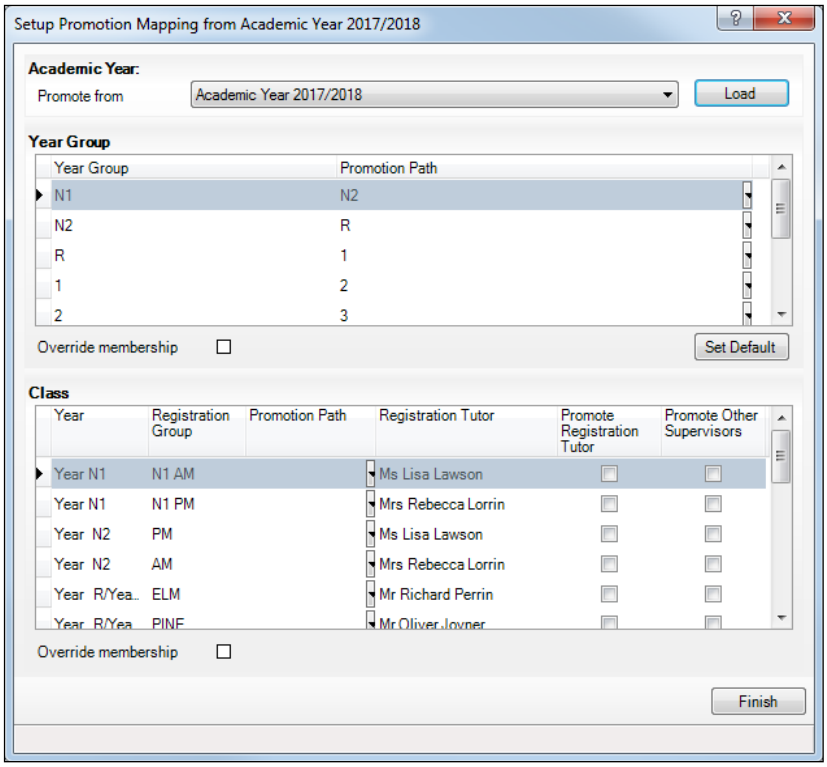


3. The current academic year should be selected automatically from the **Promote from** drop-down list. If it is not selected automatically, select it from the drop-down list then click the **Load** button.

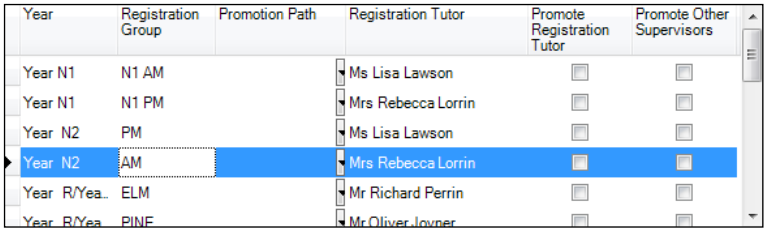
   WARNING: *It is imperative that you select the correct academic year otherwise any changes made will affect the wrong year and it will be very difficult to rectify.*

4. The **Year Group** panel is populated with a default set of promotion paths (where one year is promoted to the next, i.e. Year 1 is promoted to Year 2 and so on). This is the same for both vertically or horizontally structured schools. If you wish to return to this setting at any point in the future, click the **Set Default** button.
5. Change the promotion path if required, by clicking the required year group in the **Promotion Path** column then selecting the required year from the drop-down list.

*NOTE: Schools that have a year group **N1** must ensure that this is mapped to **N2**.*



If your school has a vertical structure, the years are displayed the same in the **Year** column as they are displayed in the following example.



To facilitate the identification of year group names, drag the dividing line of the column heading to increase the size of the **Year** column.

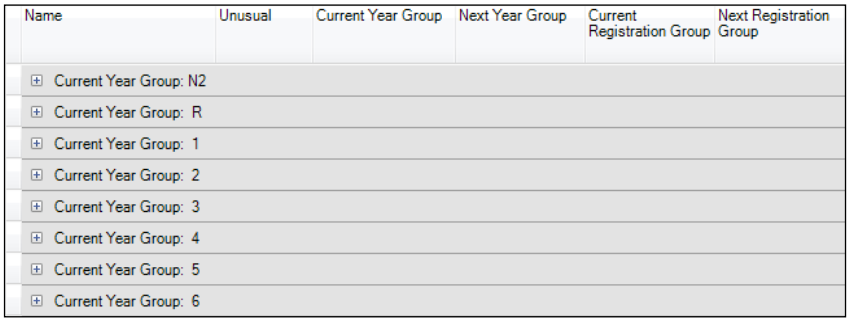
6. Review the promotion path for each class. The **Class** panel displays a list of the classes for the current academic year. Move down one class at a time by clicking in the **Registration Group** column then select the class to which the pupil/student will be promoted from the **Promotion Path** column drop-down list. Repeat this process for all the classes in the **Class** panel.
7. The **Registration Tutor** column displays the name of the current class tutor. If you want the tutor of the class to be promoted into the next academic year with the class, select the **Promote Registration Tutor** check box.

8. If any existing Classroom Assistants or Learning Support Assistants should be promoted into the next academic year with the class, select the **Promote Other Supervisors** check box.
9. Select the **Override Membership** check box in both the **Year Group** and **Class** panels the first time you carry out the promotion mapping process.

   This ensures that any existing memberships (however they were defined) are overwritten. If you repeat the promotion process, you can decide whether to overwrite the existing memberships by selecting the check box as required. For example, if you had originally stated that pupil/students in the **Pine** class should be promoted to the **Ash** class and subsequently wanted them to go from **Pine** to **Oak**, you would need to select the **Override Membership** check box in the **Class** panel.

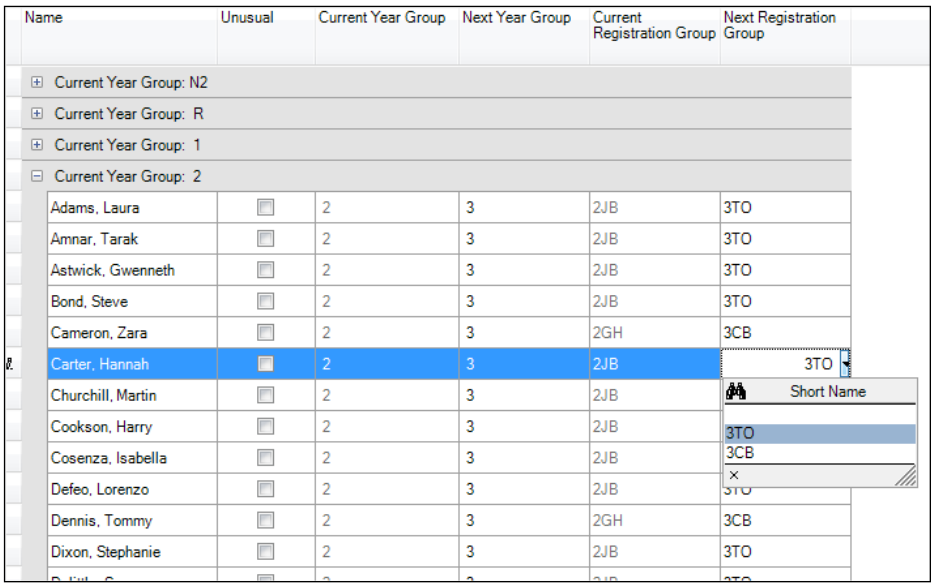
   IMPORTANT NOTE: *If you already carried out this process to set up your mappings and you now wish to edit them, please ensure that the Override Membership check box is not selected if you wish to retain your previous settings.*
10. Click the **Finish** button and then **Save** the settings.
11. Click the **Map** button on the toolbar at any point to return to the **Setup Promotion Mapping** dialog.

    SIMS displays the **Promote Pastoral Groups** page, which lists the current year groups.

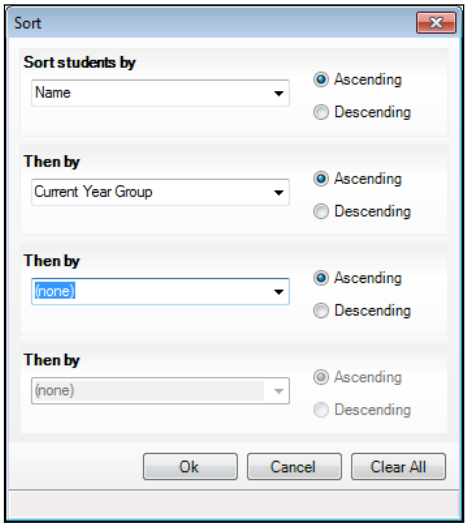


Viewing/Setting the Promotion Path for Individual Pupil/Students

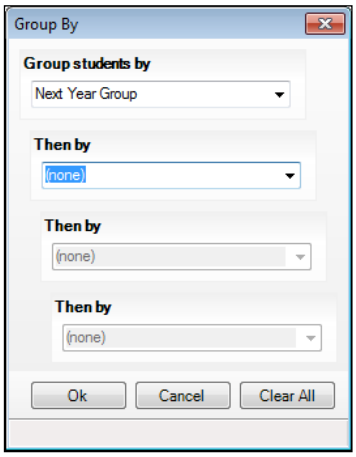
1. Double-click the current year group for which you wish to view or set individual promotion paths, to view the promotion path for each pupil/student.



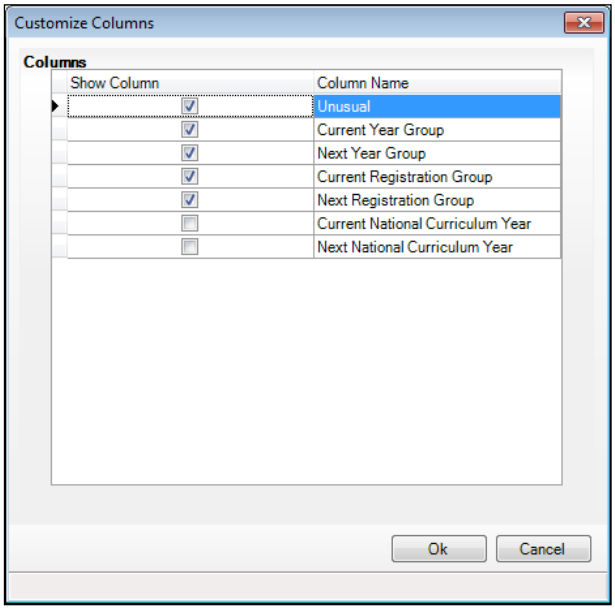
2. You can customise the view on this screen by selecting an option from the **Customize** drop-down list.
   - Select **Sort** to display the **Sort** dialog, which enables you to order the contents of the columns, as shown in the following example.



- Click the **Customize** button down arrow and select **Group By** to display the **Group By** dialog, which enables you to change the groupings, as shown in the following example.



- Select **Columns** to display the **Customise Columns** dialog, which enables you to choose the columns you wish to include in the display.



3. Once expanded, you can change the year or class for individual pupil/students by clicking in the appropriate column and selecting a different year or class from the drop-down list. The change appears in red and the **Unusual** check box is selected automatically to indicate that the change falls outside the normal mapping set previously (using the **Setup Promotion Mapping** dialog). Repeat the process for any other pupil/students, if required.

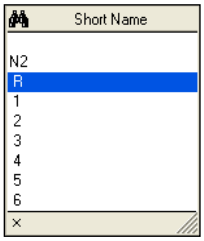
Multiple pupil/students can be highlighted using any of the following methods:

- Hold down the **Ctrl** key then click each pupil/student you wish to select.

Adams, Laura	☐	2	3	2JB	3TO
Amnar, Tarak	☐	2	3	2JB	3TO
Astwick, Gwenneth	☐	2	3	2JB	3TO
Bond, Steve	☐	2	3	2JB	3TO
Cameron, Zara	☐	2	3	2GH	3CB
Carter, Hannah	☐	2	3	2JB	3TO
Churchill, Martin	☐	2	3	2JB	3TO
Cookson, Harry	☐	2	3	2JB	3TO
Cosenza, Isabella	☐	2	3	2JB	3TO
Defeo, Lorenzo	☐	2	3	2JB	3TO
Dennis, Tommy	☐	2	3	2GH	3CB
Dixon, Stephanie	☐	2	3	2JB	3TO

- To highlight sequentially listed pupil/students, click the first name in the list, hold down the **Shift** key then click the last name in the list.

*NOTE: If the **Filter** button is deselected, all Year Groups and classes are available for selection from the drop-down lists, not just those that are associated with the chosen **Year Group** or **Class**.*



*For example, a pupil/student currently in **Year Group R** would normally be expected to promote into **Year Group 1**. It is possible (for whatever reason) that this pupil/student will actually be promoted into **Year Group 2** in the forthcoming academic year. To enable you to achieve this, click the **Filter** button and select the required **Year Group** and **Class** from the drop-down lists.*

4. Click the **Save** button to save the promotion mappings. The promotion occurs at the beginning of the next academic year. A warning is displayed if any unusual promotions have been set. Accept the warning by clicking the **Yes** button.

☐ **Completed**

Checking the Registration Tutors Assigned

Once the promotion mapping process is complete, you are strongly advised to check the registration group assignments in the pastoral structure.

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure**.
2. Click the **+** icon adjacent to **Pastoral Structure** to reveal each registration group.
3. Right-click the name of each registration group and select **Properties** from the pop-up menu to display the **Class** dialog.
4. If necessary, add or change the **Registration Tutor** by clicking the **Browser** button, searching for then selecting the required person. Click the **OK** button.
5. If two registration tutors share the group, click the **New** button adjacent to the **Supervisors** panel to display the **Supervisor Properties** table. Select the **Role** of **Joint Main Supervisor** from the drop-down list then select the required person by clicking the **Browser** button then searching for and selecting the required person from the **Select person** dialog. Click the **OK** button to confirm the selection.
6. Click the **OK** button to return to the pastoral structure then click the **Save** button once you have assigned all the required registration tutors.

❑ **Completed**

Changing the Status of Applications to Offered or Accepted

This section describes how to change the status of applications to your school for the forthcoming academic year in bulk. Applications can be added manually or imported via ATF or CTF. When added, an application is automatically given a status of **Applied**. If required, you can then offer places to applicants you wish to join your school (**Offered**) and then change the status of the application to **Accepted** once you have received confirmation that they will be joining. It is possible however, to change an application status from **Applied** to **Accepted** or even straight to **Admitted**, if required.

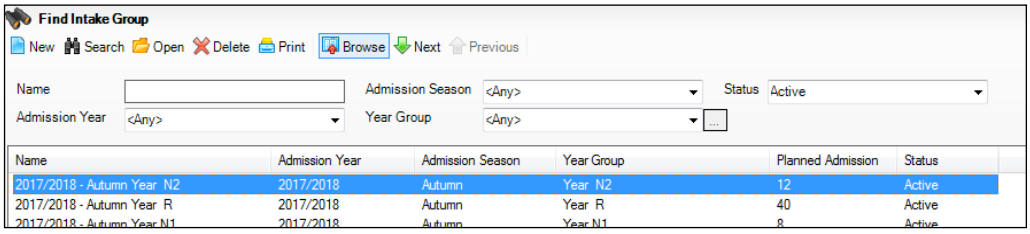
It is also possible to change the application status of individual applicants. For more information, please refer to the appropriate *Admissions* handbook.

This section assumes that you have added all of the required applicants via **Focus | Admission | Application**, and that you have imported via CTF or ATF.

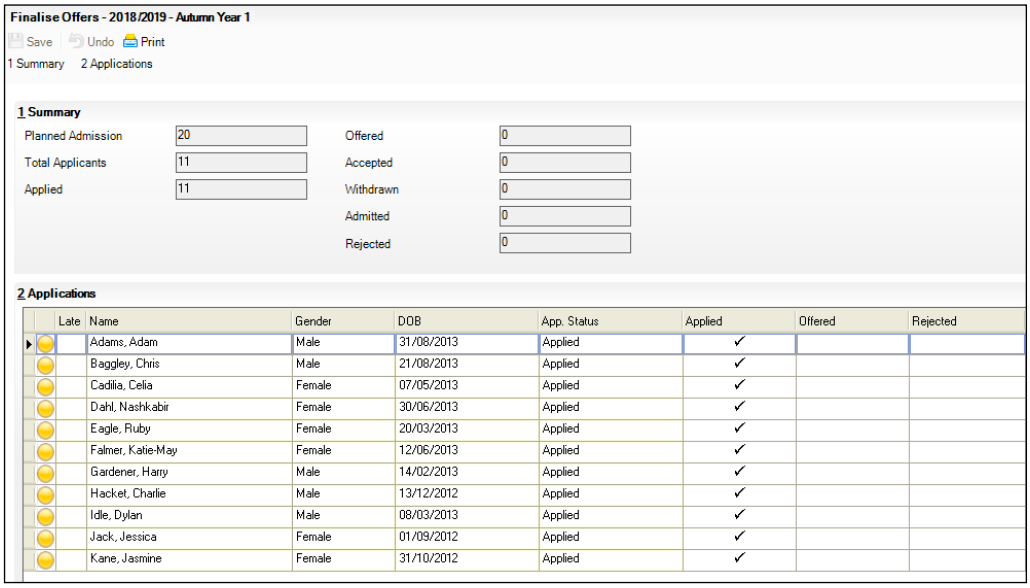
Finalising Offers

If you wish to offer places to applicants, please follow the instructions outlined in this section. If you do not want to record offers made, but wish to identify applicants who have accepted a place at your school, please proceed to *Accepting Applicants*.

1. Select **Routines | Admission | Finalise Offers** to display the **Find Intake Group** browser.



2. Search for then double-click the required intake group to display the **Finalise Offers** page.

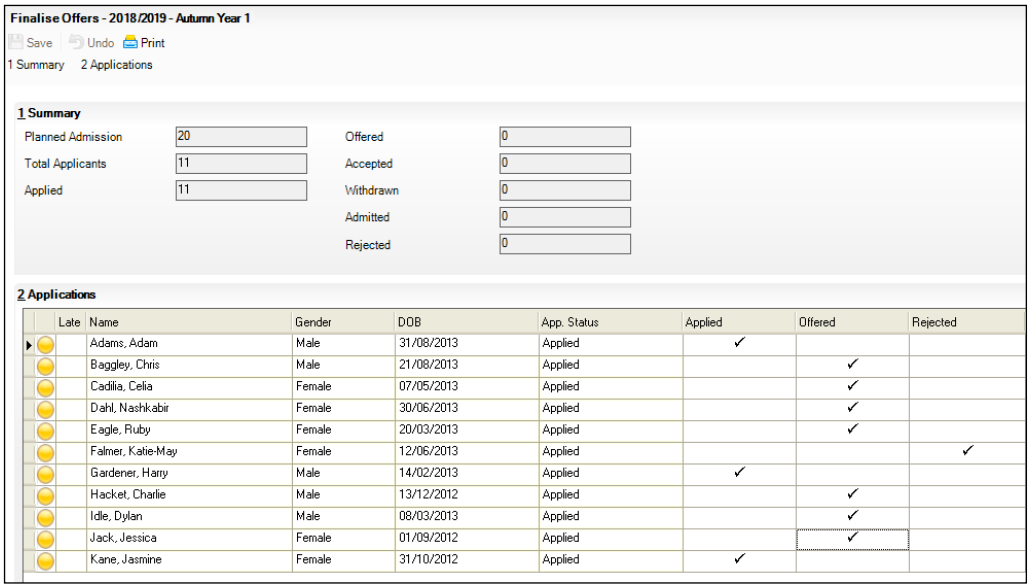


The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied**. Own Admission Authority schools are also provided with the **Late Applications** field.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, **Admitted** and **Rejected** (Independent schools only) are updated as applicable information is edited and saved.

The **Applications** panel shows all the applicants who have applied for a place at your school, together with the status of their application.

3. To change the application status, click the required cell for each applicant, as shown in the following graphic.

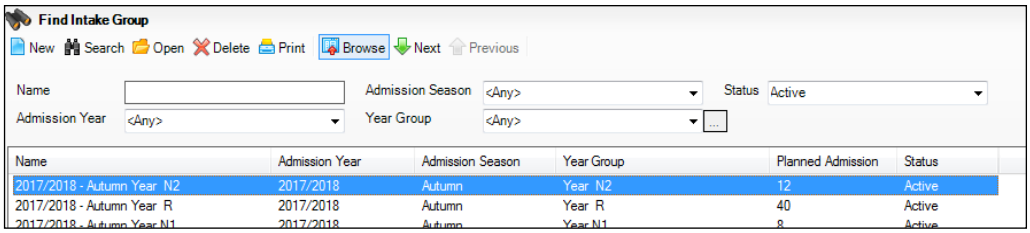


Accepting Applicants

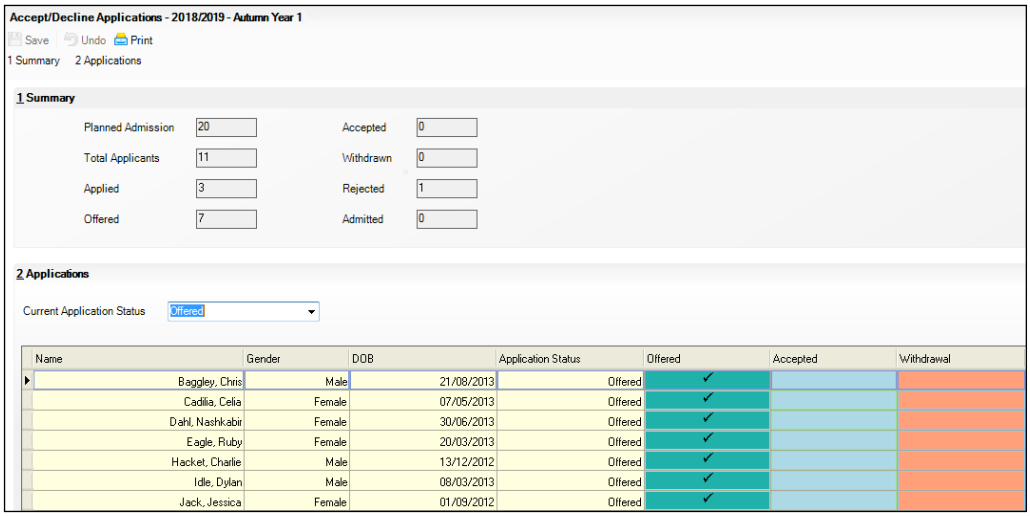
This section describes how to record applicants who have accepted a place at your school. This is achieved by changing the application status to **Accepted**.

The following instructions demonstrate how this can be achieved for all pupil/students in an intake group. It can also be achieved at individual pupil/student level via **Focus | Admission | Applicants**.

1. Select **Routines | Admission | Accept Applications** to display the **Find Intake Group** browser.



2. Search for then double-click the required intake group to display the **Accept/Decline Applications** page.

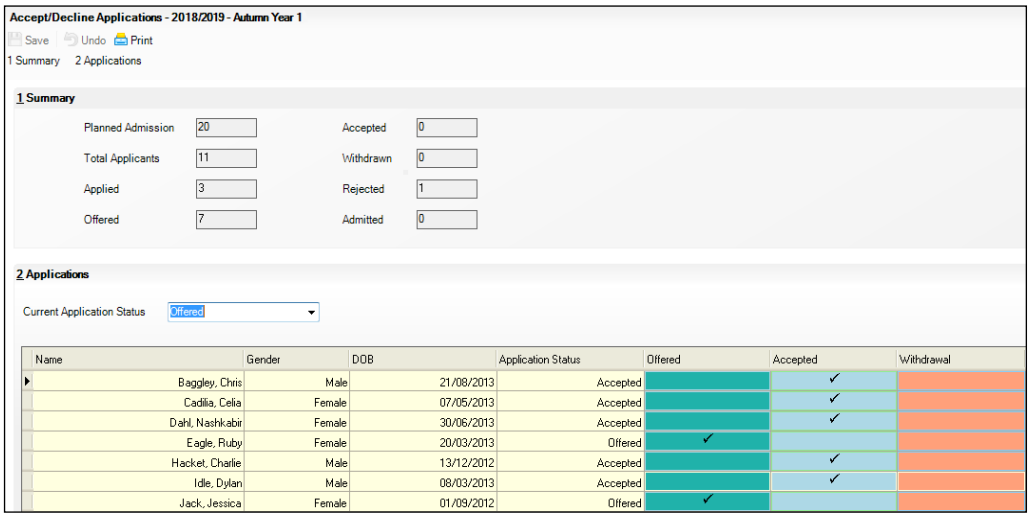


The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied** for, or been **Offered**, a place at your school.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, **Admitted** and **Rejected** (Independent schools only) are updated as applicable information is edited and saved.

The **Applications** panel displays by default, all applicants with an application status of **Offered**. The display includes the **Name**, **Gender**, date of birth (**DOB**) and **Application Status** of each applicant, together with a tick grid that enables the application status to be amended.

3. Click the **Accepted** column for each applicant who has accepted a place at your school. To accept, click in the cell to put a tick in it. To withdraw, click the **Withdraw** column.



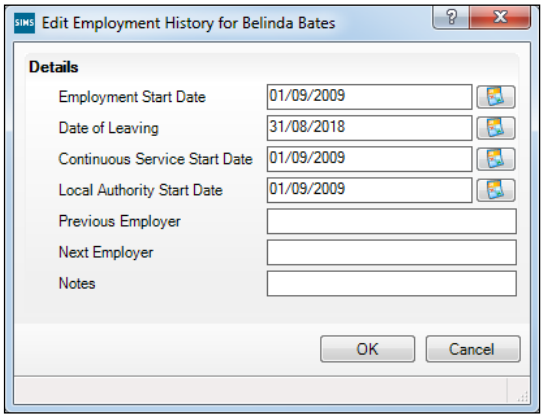
4. If you wish to accept applicants with a status of **Applied**, select **Applied** from the **Current Application Status** drop-down list and follow this same process.
5. Once complete, click the **Save** button to save the changes. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list is empty.

☐ **Completed**

Adding Leaving Dates for Existing Staff Members in Personnel

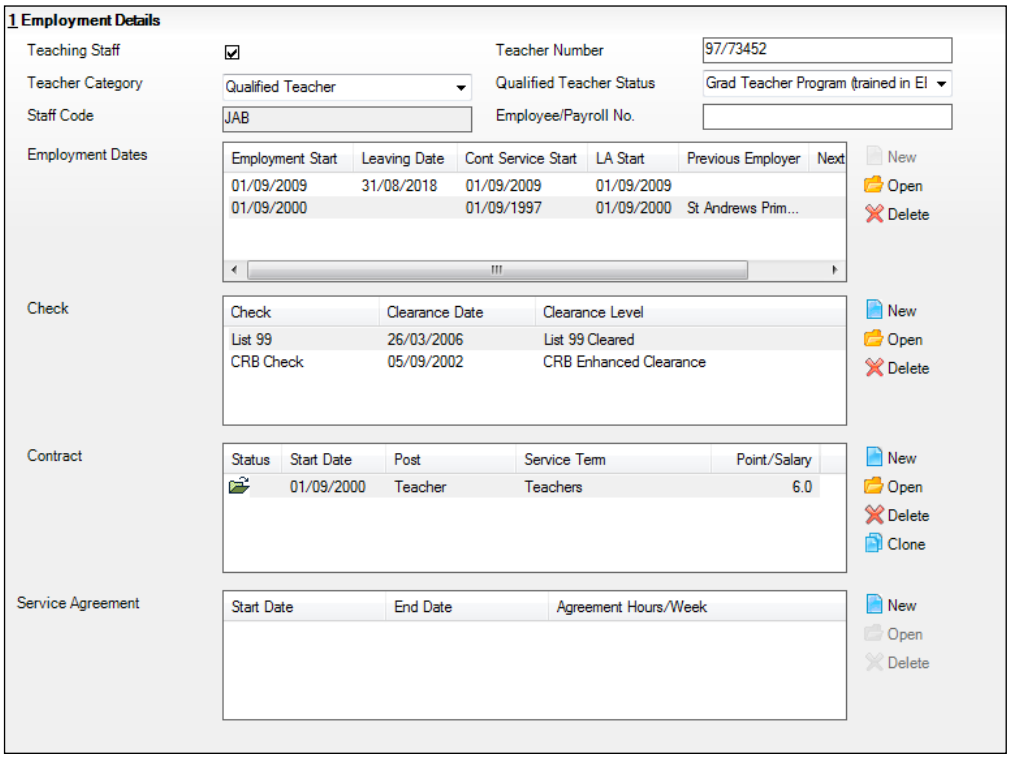
Enter leaving dates for any teachers as soon as they have left your school.

1. Select **Focus | Person | Staff** to display the **Find Employee** browser.
2. Search for and then select the required member of staff to display their details on the **Employee Details** page.
3. Click the **Employment Details** tab to display the **Employment Details** panel.
4. In the **Employment Dates** table, highlight the required record then click the **Open** button to display the **Edit Employment History** dialog.



5. Enter the **Date of Leaving** in dd/mm/yyyy format or click the **Calendar** button and select the required date.

6. Click the **OK** button to return to the **Employee Details** page.



7. Click the **Save** button to save the changes. Repeat for any other leavers.

Completed

Allocating Applicants to Registration Groups/Classes

Before allocating applicants to classes, you must have:

- added the applicants by clicking the **Application** icon on the toolbar or selecting **Focus | Admission | Application**, or imported via ATF or CTF.

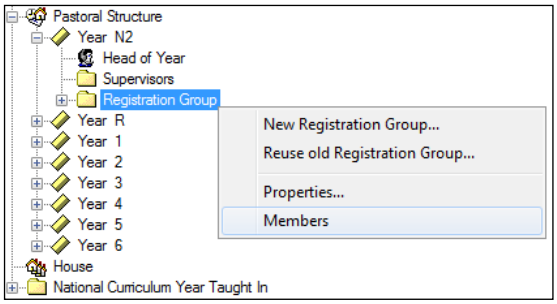
Application icon

- changed the applicant's application status (please see *Changing the Status of Applications to Offered or Accepted* on page *50*) to **Offered** or **Accepted**.

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

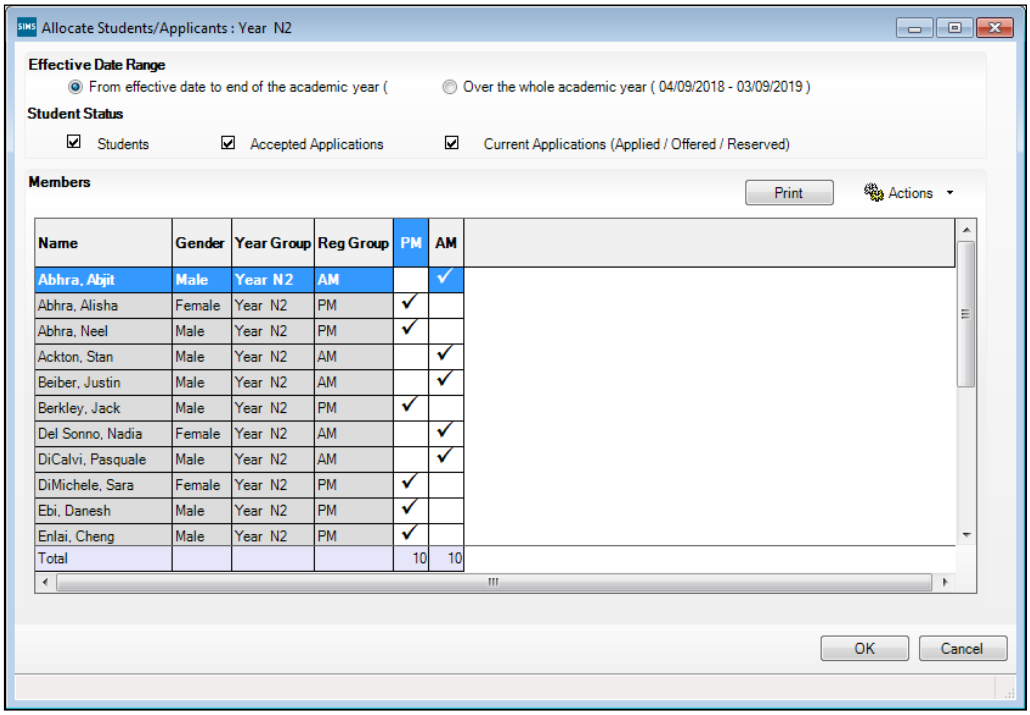
   The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information.

2. Expand the **Pastoral Structure** until the **Registration Group** folder is visible under the required year.



3. Right-click the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

   The **Name**, **Gender**, current **Year Group** and current **Reg Group** are displayed for each applicant together with the total number of applicants allocated to each class (at the bottom of the grid). Right-click any column heading to change the order.



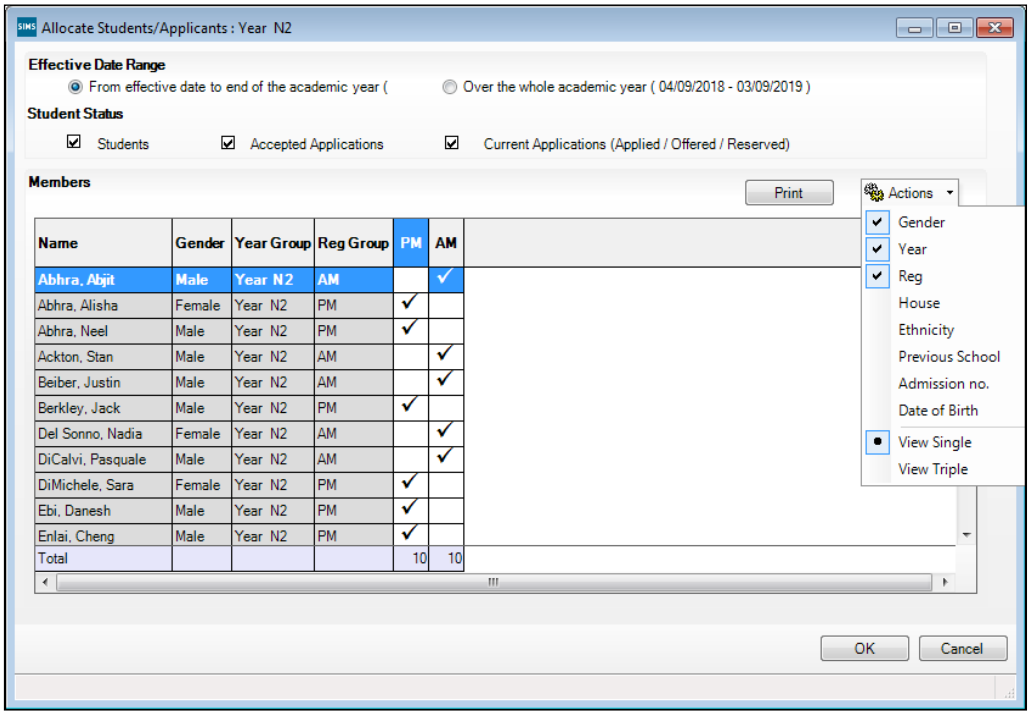
The **Student Status** section enables you to limit the applicants displayed in the grid, as follows:

- **Students** – select this check box to display any on-roll pupil/students who have been assigned to any class within the selected year. These pupil/students are displayed with a grey background.
- **Accepted Applications** – select this check box to display any applicants who have an application status of **Accepted** (i.e. they have accepted a place at your school). These applicants are displayed with a pink background.

- **Current Applications** – select this check box to display any applicants who have an application status of **Offered** (i.e. they have been offered a place at your school). These applicants are displayed with an orange background.

> *NOTE: Although you can specify which class the applicants will go in, the applicants must be admitted (via **Routines | Admission | Admit Applications**) before they become a member of this class.*

Additional columns (**House**, **Ethnicity**, **Previous School**, **Admission no.** and **Date of Birth**) can also be displayed on the grid by selecting the appropriate option from the **Actions** drop-down menu.



The previous graphic shows that **Date of Birth** has been added to the grid. It can also be useful to change the view to **View Triple**, which displays a breakdown of totals for females and males in each group.

4. Select the required class for each applicant in the grid by clicking the appropriate cell to display a tick. Clicking the cell again removes the tick.
5. Once you have selected classes for each the applicants, click the **OK** button to save the changes.

☐ **Completed**

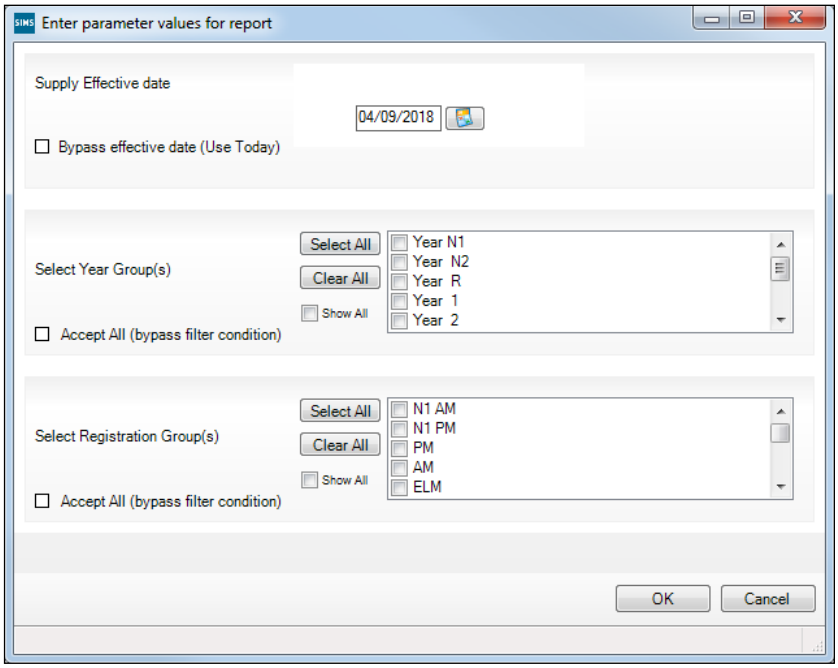
Printing Class (Registration Group) Lists for the New Academic Year

Class (Registration Group) lists can be easily produced using any of the following pre-defined reports:

- Registration Groups (Dated)
- Registration Groups (Dated – DOB Sort)
- Registration Groups (Dated – Gender Sort)
- Registration Groups (Dated with Columns).

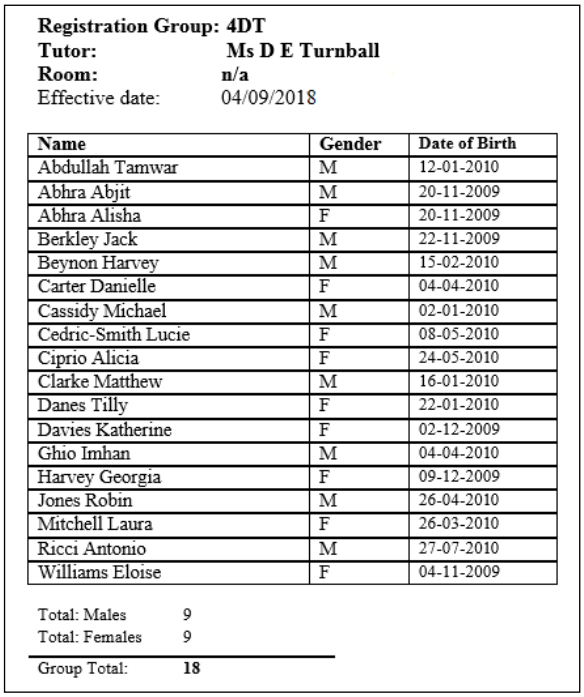
If these reports do not exist on your system, you need to import the latest pre-defined reports. For more information, please refer to the *Designing and Running Reports* handbook.

1. Select **Reports | Run Report** to display the **Report** browser.
2. Expand the **Student** focus and double-click the required pre-defined report, e.g. **Registration Groups (Dated)** to display the **Enter parameter values for report** dialog.



3. Deselect the **Bypass effective date** check box.
4. Enter the required date, e.g. `04/09/2018` or click the **Calendar** button and select the required date.
5. Select the required **Year Group(s)** and **Registration Group(s)** then click the **OK** button to produce the required report.

Registration Groups (Dated) Report



Registration Group: 4DT
Tutor: Ms D E Turnball
Room: n/a
Effective date: 04/09/2018

Name	Gender	Date of Birth
Abdullah Tamwar	M	12-01-2010
Abhra Abjit	M	20-11-2009
Abhra Alisha	F	20-11-2009
Berkley Jack	M	22-11-2009
Beynon Harvey	M	15-02-2010
Carter Danielle	F	04-04-2010
Cassidy Michael	M	02-01-2010
Cedric-Smith Lucie	F	08-05-2010
Ciprio Alicia	F	24-05-2010
Clarke Matthew	M	16-01-2010
Danes Tilly	F	22-01-2010
Davies Katherine	F	02-12-2009
Ghio Imhan	M	04-04-2010
Harvey Georgia	F	09-12-2009
Jones Robin	M	26-04-2010
Mitchell Laura	F	26-03-2010
Ricci Antonio	M	27-07-2010
Williams Eloise	F	04-11-2009

Total: Males 9
Total: Females 9
Group Total: **18**

Registration Group (Dated – DOB Sort)

As per the Registration Groups (Dated) report but in Date of Birth order.

Registration Group (Dated – Gender Sort)

As per the Registration Groups (Dated DOB Sort) report but in Gender order.

Registration Group (Dated – With Columns)

As per the Registration Group (Dated) report but with five additional blank columns.

☐ **Completed**

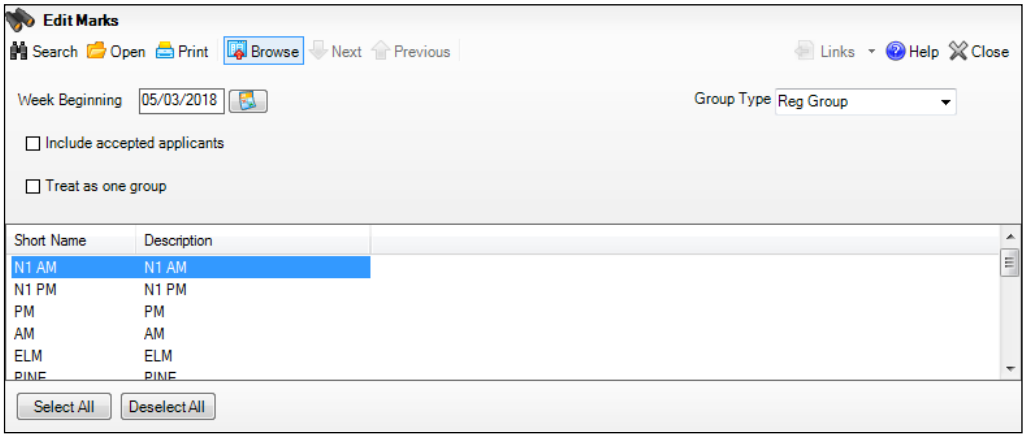
02| Processes to be Carried Out in Other SIMS Modules

In SIMS Attendance - Entering Reasons for Absence Last Year 61
Academic Management (Primary Curriculum) End of Year Processes 62
Dinner Money 63
After the New Academic Year has Started 64
Running Housekeeping Routines in SIMS 71
In SIMS Attendance - Printing OMR Registration Sheets for the First Week of Term 73

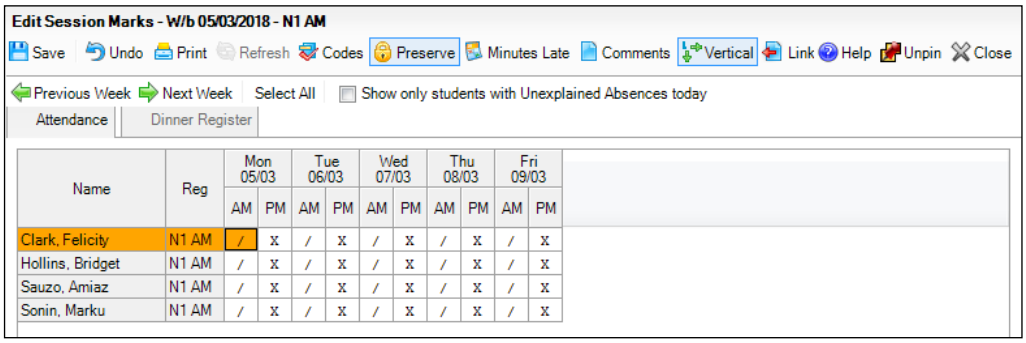
In SIMS Attendance - Entering Reasons for Absence Last Year

If you are using OMR Absence sheets, read the sheets in via **Routines | Attendance | OMR Entry | Read OMR Absence Sheets**.

If you are using Edit Marks (via **Focus | Attendance | Edit Marks**), put the date back in the **Week Beginning** field to the required date, then click the **Search** button.



Double-click the required class to display marks for the chosen group(s) then edit as required. Selecting the **Show only students with Unexplained Absences today** check box may speed up this process.



☐ **Completed**

Academic Management (Primary Curriculum) End of Year Processes

The Primary Curriculum module is a tool that allows schools in the Primary sector to create teaching groups by combining and re-allocating pupil/students from different classes or years, or by dividing up the pupil/students of a single class. If you have created teaching groups for the current academic year using Primary Curriculum and wish to use a similar system next year, you need to recreate these groups for the new academic year. Unlike the Pastoral Structure, academic structures are bound to specific Academic Years. So even if next year's Literacy sets look exactly like the ones in use this year, they must in fact be a different set of teaching groups, and defined within a new 'scheme'. This can be done at any point either before or after the new academic year begins, but after the promotion path has been created. The groups created within previous academic years can still be accessed by changing the academic year selected via **Tools | Academic Management | Set Academic Year**.

1. In order to create or edit teaching groups for an academic year other than the current one, select the required academic year via **Tools | Academic Management | Set Academic Year**.
2. Create new curriculum schemes and within them, the required teaching groups via **Focus | School | Academic Structure | Edit Curriculum Structure**.
3. Allocate pupil/students to their teaching groups via **Focus | School | Academic Structure | Curriculum Assignment by Scheme**. This needs to be done after pupil/students have been allocated to their new registration groups, using the promotion path.

   The process of creating teaching groups is described in detail in the *Academic Management for Primary Schools* handbook. A Quick Start Guide is also provided as an appendix in the same handbook.

Dinner Money

There are no end of year processes in Dinner Money. However, the following activities should be carried out:

- It is advisable to reconcile pupil/student and staff balances, issue refunds or collect debts (where possible) before the end of term, particularly for any pupil/students or staff who are leaving the school.
- Any meal price changes should ideally be entered at the start of the academic year, as additional processing will be necessary to remove recorded meals and add price changes retrospectively. These can be entered via **Tools | Dinner Money | Pupil Meal Definitions/Staff Meal Definitions/Adhoc Meal Definitions** and/or **Other Sales Definitions**.
- Print the final catering return on the last day of term.
- Where appropriate, send the debt and credit reports (produced via **Reports | Dinner Money | Finance | Pupil Balances** or **Staff Balances**) to the caterers.
- Prior to the start of the new catering year, a new catering year should be created via **Tools | Dinner Money | Setup**, corresponding to the start of the new catering year.

> *NOTES: The new academic year should be created first. You will then need to close and re-open SIMS before adding the new catering year.*
>
> *The catering year may not correspond with the academic year.*

You may choose to print off a copy of the Pupil Balances and Staff Balances reports (via **Reports | Dinner Money | Finance | Pupil** (or **Staff**) **Balances**) from the date of your opening balances in Dinner Money to the last working day of the current academic year as a record of opening balances, all meals taken, transactions and balances at the year end.

Meal Charges Mapping

Tools | Dinner Money | Setup

Please be aware of the following, in cases where schools have mapped meal charges to classes/registration groups, rather than to either Tiers or Year groups (as the latter two are less likely to change).

It is not possible to change the meal charges mapping from, for example, classes to year groups. If schools change their class names in September, but simply rename the old class names, the existing meal definitions will continue to work with the new names.

If schools create new classes and make old classes inactive, in September an error message will be displayed when trying to enter payments because any meals recorded in the new classes will not be mapped to the existing meal definitions. Also, schools will not be able to add the new classes to the existing meal definitions/charges because the meals will have already been recorded (even if they try to delete the recorded meals).

To prevent this issue occurring, you must either:

- Create new meal definitions for the new classes, adding the meal price (with a start date before the start of term) and selecting all the new classes. This will need to be done for all active meal types, including Absent, Other School, etc. The disadvantage of this is that in future schools will need to add price changes to both meal definitions, to cover all classes.

  or

- Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2018. Enter a new meal definitions, with meal charges having a start date of, e.g. 01/09/2018 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

This must be done before the start of the new academic year.

If the new year has already started and schools have recorded meals, you can create temporary meal types and definitions for the new classes and use these to re-record the meals for the affected dates. Give all current meal charges an end date in the existing meal definitions, e.g. 31/08/2018. Enter a new meal definitions, with meal charges having a start date of, e.g. 01/09/2018 and select all classes listed. You can carry on using the existing meal types, as long as the charge dates do not overlap in the meal definitions. Then append the name of the old meal definitions to include, e.g. 'Inactive'.

After the New Academic Year has Started

The following routines should be undertaken once the new academic year has been started.

- In SIMS, admit applicants (please see *Admitting Applicants* on page *64*).
- In SIMS, record any re-admission pupil/students (please see *Re-Admitting Pupil/Students* on page *67*).
- In Attendance, print the official register for July (please see *In SIMS Attendance - Printing the Official Register for July* on page *68*).
- In Attendance, use the Part-Time Pupil/Students routine to add Not Required codes (please see *In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes* on page *69*).

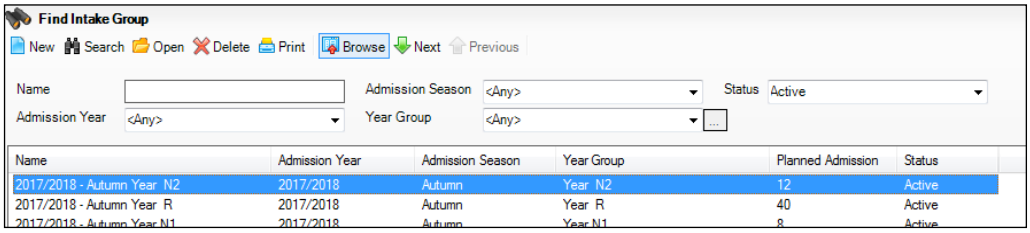
Admitting Applicants

Applicants should be admitted on the first day that they actually arrive at the school. If, however, you have been contacted by a parent who explains why their child will not be able to start on the specified date, you can agree a new start date for that applicant.

*NOTE: Guest pupil/students will be admitted and a pupil/student record created. They will not have an admission number (because they are a guest) and therefore, will not appear on-roll. They can be selected from the **Find Pupil** (or **Student**) browser (via **Focus | Pupil** (or **Student**) | **Pupil** (or **Student**) **Details**) by selecting **Guest** from the **Status** drop-down list.*

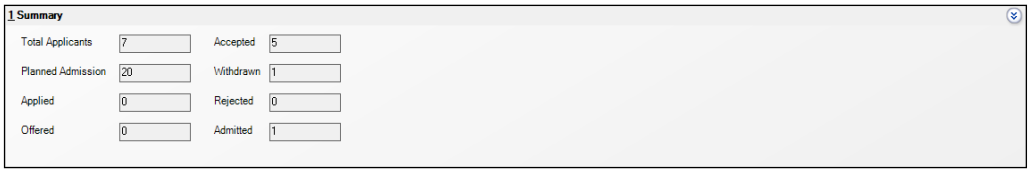
For more detailed instructions, please refer to the appropriate *Admissions* handbook.

1. Select **Routines | Admission | Admit Applications** to display the **Find Intake Group** browser.



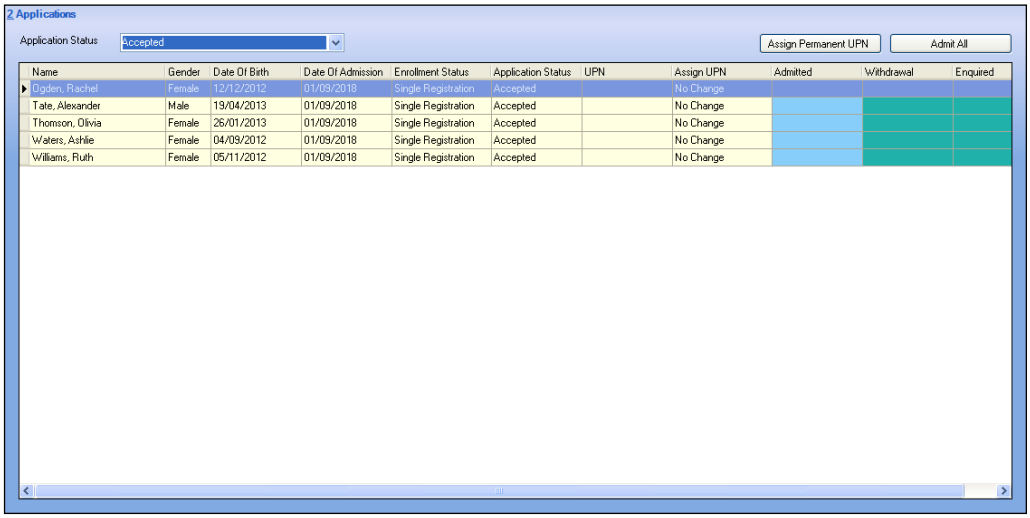
2. Search for and then double-click the required intake group to display the **Admit Applicant Detail** page.

   The **Summary** panel displays read-only statistics about the selected intake group as shown in the following graphic.

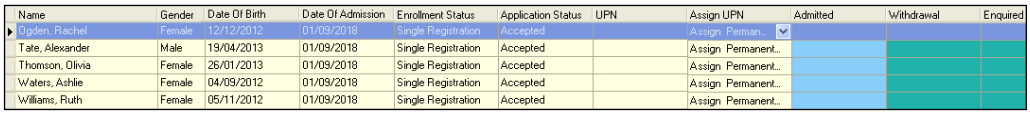


Total Applicants	The number of applicants who have applied for a place in this intake group.
Planned Admission	The original number of new applicants intended for this intake group.
Applied	The number of applicants who have applied for places in this intake group.
Offered	The number of applicants offered places in this intake group.
Accepted	The number of applicants who have accepted places in this intake group.
Withdrawn	The number of applicants who have withdrawn their application.
Rejected	The number of rejected applications in this intake group (Independent schools only).

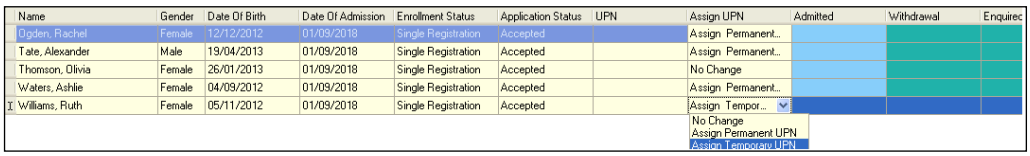
The **Applications** panel displays by default, all applicants with an application status of **Accepted**. The display includes the **Name**, **Gender**, **Date of Birth,** proposed **Date of Admission**, **Enrolment Status**, **Application Status**, **UPN** and whether a UPN will be assigned. A tick grid is provided, enabling the application status to be amended as required. The order of the display can be changed by clicking any column heading.



3. If you wish to admit applicants with a different application status (such as **Offered**) select it from the **Application Status** drop-down list then follow the remainder of this process.
4. If you need to add UPNs, click the **Assign Permanent UPN** button. The **Assign UPN** column is then populated with **Assign Permanent UPN**, as shown in the following graphic.



5. To edit individual applicants, select the required value from the drop-down list in the **Assign UPN** column, e.g. **No Change** (if the applicant already has a UPN) or **Assign Temporary UPN**, as shown in the following graphic.

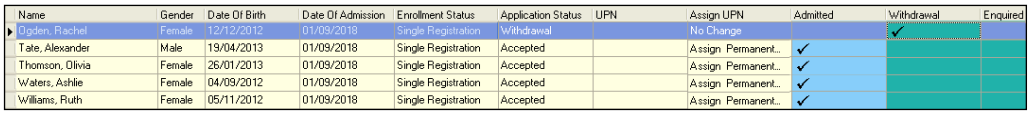


- Permanent UPNs are issued to new applicants only when it is believed that they have never previously been allocated a UPN, or to replace a temporary UPN.
- Temporary UPNs are issued to an applicant only when a school does not know their permanent UPN (e.g. the school is awaiting a transfer file or awaiting an applicant's information).

IMPORTANT NOTE: *UPN information is required for School Census. This is the only opportunity to bulk allocate UPNs. If you do not generate them here, you need to allocate UPNs on an individual basis via the* ***Pupil*** *(or* ***Student****)* ***Details*** *page. Any known existing UPNs can be entered in the* ***Basic Details*** *panel by clicking the* ***Application*** *icon on the toolbar or by selecting* ***Focus | Admission | Applicant****.*

Application icon

6. If you intend to admit all the applicants in the selected intake group, click the **Admit All** button. Alternatively, click in the **Admitted** column adjacent to each applicant you wish to admit. The most effective method is to click the **Admit All** button and edit any exceptions.



Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal	Enquired
Ogden, Rachel	Female	12/12/2012	01/09/2018	Single Registration	Withdrawal		No Change		✓	
Tate, Alexander	Male	19/04/2013	01/09/2018	Single Registration	Accepted		Assign Permanent...	✓		
Thomson, Olivia	Female	26/01/2013	01/09/2018	Single Registration	Accepted		Assign Permanent...	✓		
Waters, Ashlie	Female	04/09/2012	01/09/2018	Single Registration	Accepted		Assign Permanent...	✓		
Williams, Ruth	Female	05/11/2012	01/09/2018	Single Registration	Accepted		Assign Permanent...	✓		

7. Once complete, click the **Save** button to admit the applicants. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list is empty.

☐ **Completed**

Re-Admitting Pupil/Students

This section contains a summary of the required steps. For detailed instructions, please refer to the appropriate *Admissions* handbook.

Any pupil/students who have left your school and then subsequently return, must be re-admitted rather than added to the system again. This ensures that the pupil/student's educational **History** is maintained.

IMPORTANT NOTES: *It is essential that you follow this process for re-admissions (i.e. for pupil/students who have left your school and subsequently return). Do not remove the* ***Date of Leaving*** *as a method of re-admitting. However, if the pupil/student was originally leaving and changes their mind, i.e. they do not actually leave, then you should remove their* ***Date of Leaving****.*

It is perfectly acceptable for there to be a gap between the date of leaving and the date of return and this will be reflected in SIMS if it is the case (for example, if the pupil/student leaves in July but returns in September). If you do not want any gaps in the associated class memberships, then you will need to edit the history via ***Focus | Pupil*** *(or* ***Student****)* ***| Pupil*** *(or* ***Student****)* ***Details*** *page by clicking the* ***History*** *button in the* ***Registration*** *panel.*

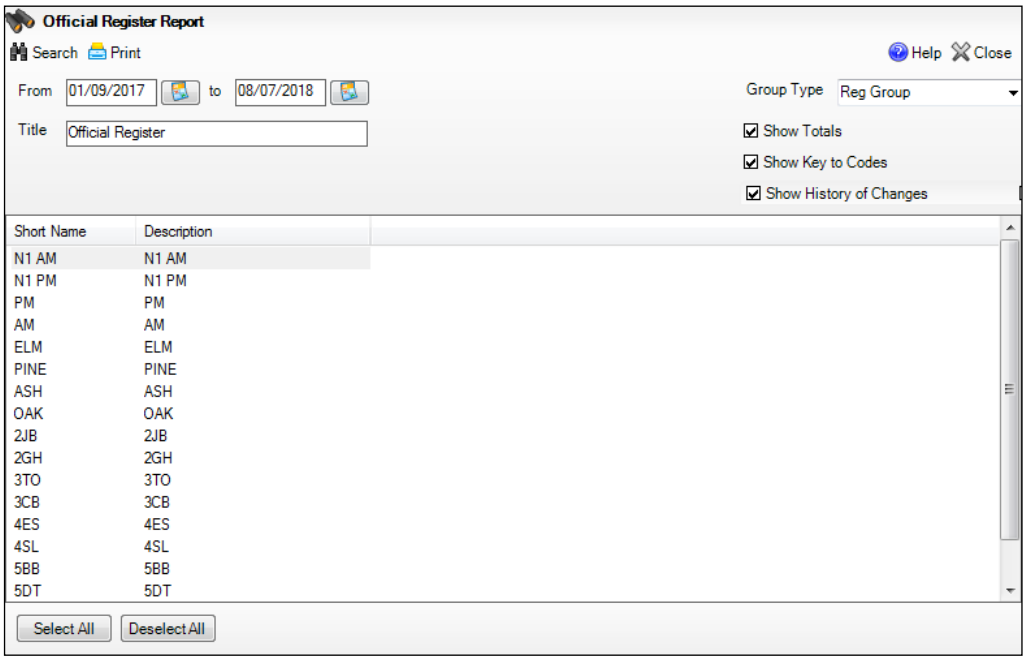
1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Pupil** (or **Student**) **Details** page.
2. Click the **New** button to display the **Add Student** page.
3. Enter the pupil/student's known details into the **Basic Details** panel then click the **Continue** button. A list of **Matched People** matching the search criteria entered is displayed.
4. Highlight the required pupil/student and click the **Open** button to display a warning message **The selected pupil/student is a Leaver, do you want to re-admit the Pupil/student?.**
5. If you are certain that this is the pupil/student who should be re-admitted, click the **Yes** button to display the pupil/student's details.
6. Add/edit further details as required, then click the **Save** button. All mandatory fields are highlighted in red and must be completed before you are able to finally save the pupil/student's details.
7. Click the **Save** button again if any additional data has been added.

☐ **Completed**

In SIMS Attendance - Printing the Official Register for July

Before printing the official register for July, you should deal with missing marks and add reasons for absence for the month you are going to print.

1. Select **Reports | Attendance | Whole Group Pupil Reports | Official Register Report** to display the **Official Register Report** page.



2. Highlight the required group(s), using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required reports.

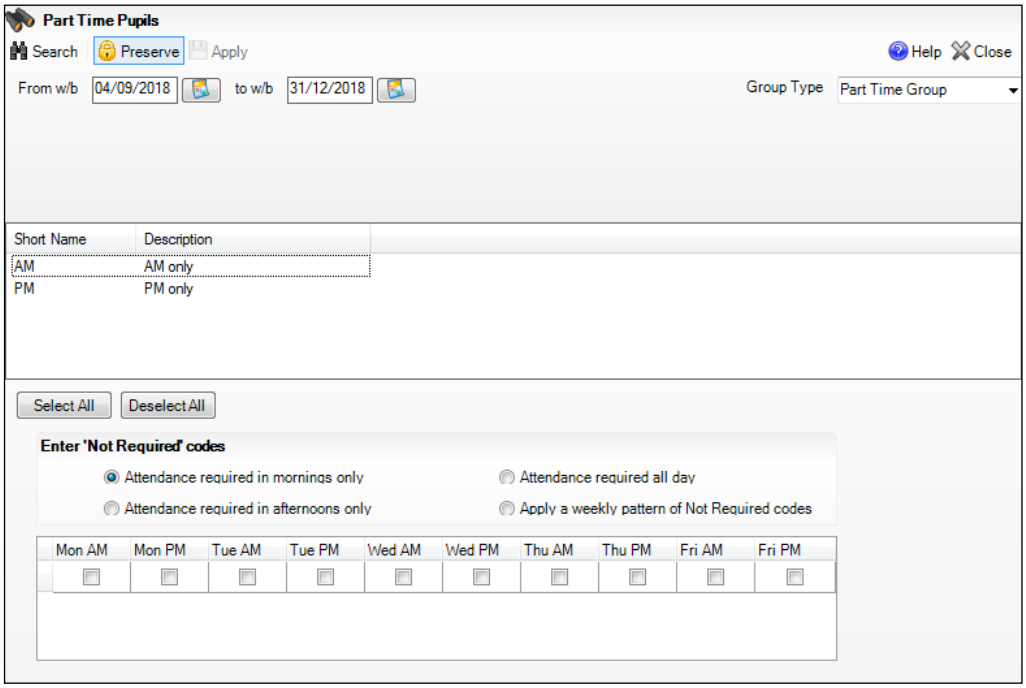
☐ **Completed**

In SIMS Attendance - Using the Part-Time Pupil/Students Routine to Add Not Required Codes

The sessions when part-time pupil/students, i.e. pupil/students of non-statutory school age, are not required to attend school can be specified using this routine. SIMS then applies the Non-compulsory school-age absence code (**X**) to the sessions that occur during the specified date range. The Week Range dates must lie within the new academic year and we would advise that you use the working academic year dates as explained in the following example.

The part-time pupil/student functionality is available via a dedicated menu route (**Tools | Setups | Attendance Setup | Part Time Pupils**). To ensure that the dedicated menu route is available, select the Show **Part-time Pupils** check box in the **Visibility Switches** panel.

1. Select **Tools | Setups | Attendance Setup | Part Time Pupils** to display the **Part Time Pupils** page.



2. Specify the date range appropriate to the period for which your chosen group will be part-time. The dates must lie within the academic year.
3. Highlight the required groups (using **Ctrl** or **Shift** to highlight multiple groups). The **Select All** and **Deselect All** button can also be used if required.

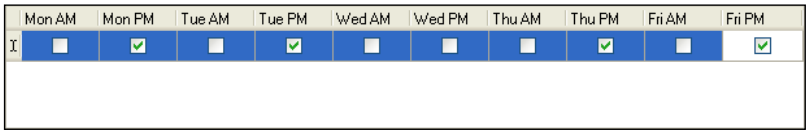
4. Specify when attendance is required by selecting one of the radio buttons.

- Attendance required in mornings only
- Attendance required in afternoons only
- Attendance required all day

  Select this option when a part-time pupil/student starts full-time school. All 'Not Required' codes for the pupil/student are removed from the system.
- Apply a weekly pattern of Not Required codes

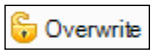
  Select this option if a mixture of AM and PM sessions is required. The associated grid is then enabled. Select the check boxes that represent the sessions when the pupil/students are not required to attend school.

In the following example, the pupil/students are expected to attend Monday, Tuesday, Thursday and Friday morning, and all day on Wednesday.



5. Existing marks can be protected or overwritten. This is achieved by clicking the **Preserve/Overwrite** toggle button.

Preserve toggle button



Overwrite toggle button

> *NOTE: If the **Overwrite** button is selected, SIMS saves the specified pattern of marks (overwriting any existing marks), for all sessions in the selected range of weeks.*

6. Click the **Apply** button to apply the codes to the selected part-time pupil/students.

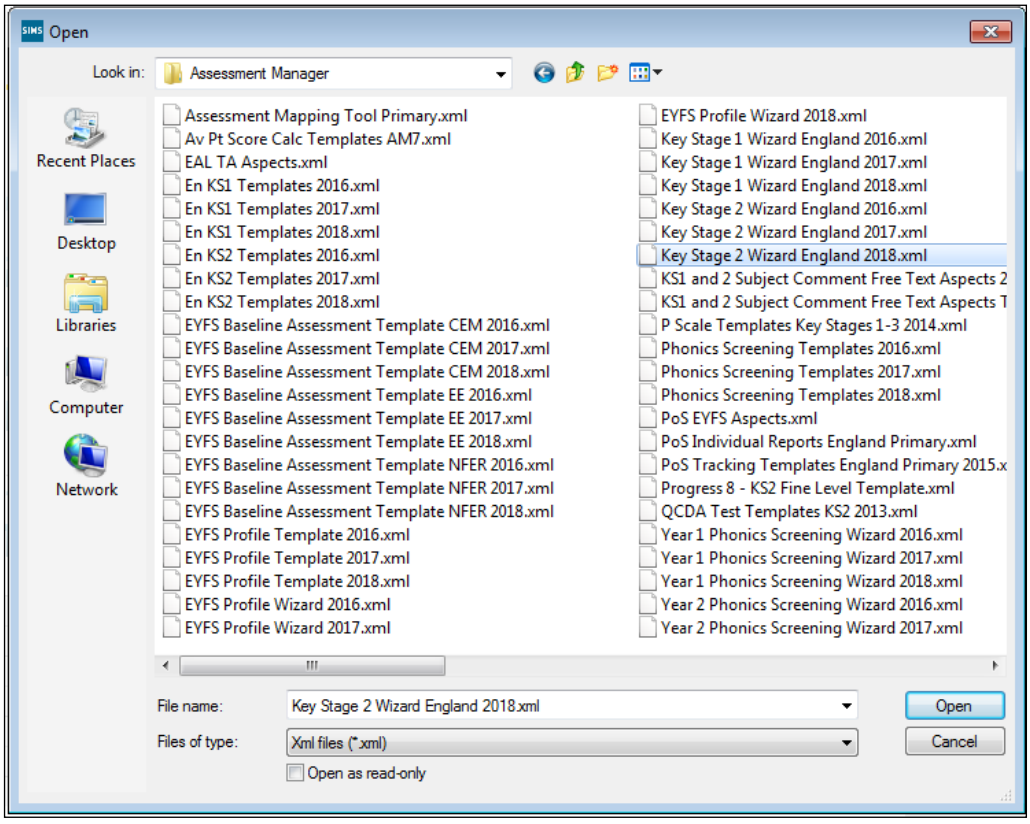
Running Housekeeping Routines in SIMS

Now is a good time to carry out some general housekeeping routines in SIMS. For more information, please refer to the *Setting Up and Administering SIMS* handbook.

Importing the Key Stage Wizard

If you would like to import the assessment components of your new pupil/students via CTF, you will need to import the relevant Key Stage wizard(s) into SIMS Assessment before importing the CTF.

1. In SIMS, select **Routines | Data In | Assessment | Import** to display the **Import** wizard.
2. Click the **Field Browser** button adjacent to the **Select the file to import from** field. Navigate to `C:\Program Files\SIMS\SIMS .net\AMPA`. Double-click the folder relevant to your school, then double-click the `Assessment Manager` folder.



3. Highlight the relevant wizard XML file, e.g. `Key Stage 1 Wizard England 2018.XML`, then click the **Open** button.
The name of the selected file is displayed in the **Select the file to import from** field. Any header comments that were added to the file when it was created for export are displayed.
4. Select the **Overwrite with default values** check box if you want to update the column headings.

5. Click the **Finish** button then the **Yes** button to start the import process. This may take several minutes. An Activity Log is displayed when the import is complete. Click the **Close** button.

SIMS Learning Gateway

This section applies only to SIMS Learning Gateway users

1. Create and distribute SIMS Learning Gateway accounts for new staff, pupil/students and parents.
2. Remove access to SIMS Learning Gateway from leavers, the parents of leavers (where they have no other children at the school), and staff who have left.

   For full instructions, please refer to the *Removing Provisioned Users* chapter in the *Active Directory Provisioning Service for Administrators* handbook.

Archiving Attendance Marks

To improve the performance of SIMS when viewing and editing attendance marks, session marks can be archived via **Tools | Housekeeping | Archive Attendance Marks | Archive**. All marks, with the exception of those recorded in the current academic year and the preceding academic year, can be archived.

NOTE: Attendance marks cannot be edited once archived.

For further information on archiving attendance marks, please refer to *Archiving Attendance Marks* in the *Housekeeping Routines* chapter of the *Managing Pupil/Student Attendance* handbook.

Adding/Removing Users from SIMS Online Services Products

This section applies only to users of SIMS Online Services products (e.g. SIMS Parent, SIMS Activities, etc.)

Users of SIMS Online Services can be managed on the **Manage Users** page of Product Admin (http://admin.sims.co.uk).

It is recommended that the following actions are taken over the summer holidays:

- Unregister staff members leaving the school
- Unregister pupil/students leaving the school
- Unregister parents of pupil/students leaving the school (except parents who have other children remaining in the school).

It is recommended that the following actions are taken over the summer holidays or early in the academic year:

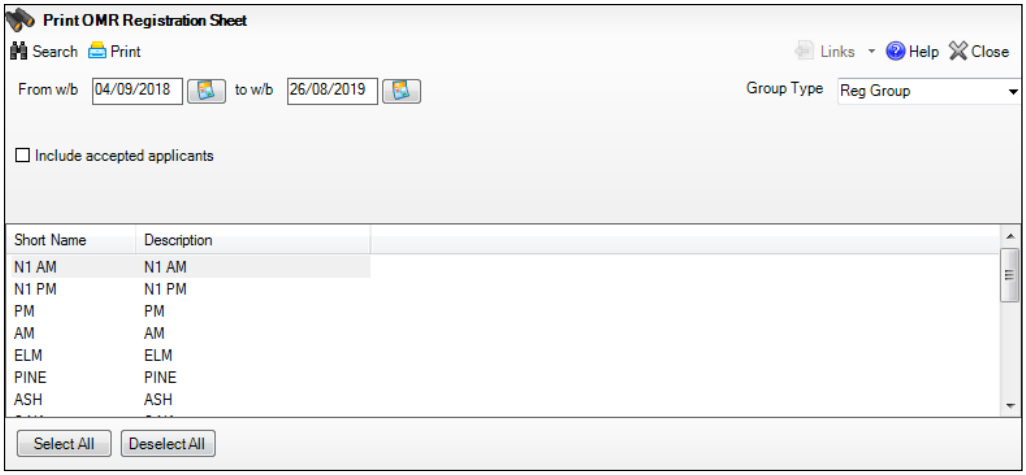
- Invite staff members joining the school
- Invite pupil/students joining the school
- Invite parents of pupil/students joining the school (except parents who have other children in the school already).

NOTE: Invitations are valid for 90 days from the date they are sent out. Parents of pupil/students who are accepted applicants are able to register to use SIMS Online Services. However, they are not able to access Data Collection functionality until their child is on roll.

For more information on inviting and unregistering users, please refer to the *Setup Guide* of the relevant SIMS Online Services product.

In SIMS Attendance - Printing OMR Registration Sheets for the First Week of Term

1. Select **Routines | Attendance | OMR Entry | Print OMR Registration Sheet** to display the **Print OMR Registration Sheet** page.



2. Highlight the required group(s) using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required registration sheets.

☐ **Completed**

SBS
School Business Services

Contact the Service Desk today on

0345 222 1551 • Option 3

or email us on

misservicedesk@
schoolbusinessservices.co.uk