SBS
School Business Services

For the academic year 2018/2019

Secondary School End of Year Procedures

Detailed

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01 | Setting Up the New Academic Year

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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 Secondary school SIMS users and includes sections for schools using any curriculum modules such as Nova-T and Options. Primary school users should refer to the *Primary 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 *4*).
❑	Create the new academic year (please see *Creating the New Academic Year* on page *17*).
❑	Set up the pastoral structure for the new academic year (please see *Setting up the New Academic Year's Pastoral Structure* on page *19*).
❑	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 *39*).
❑	Import Common Transfer Files (please see *Importing Common Transfer Files (CTFs)* on page *39*).
❑	Record leavers and update course memberships (please see *Recording Leavers and Updating Course Memberships* on page *40*).
❑	Export Common Transfer Files (please see *Exporting Common Transfer Files (CTFs)* on page *44*).
❑	Set up the promotion mapping for the new academic year (please see *Setting up the Promotion Mapping for the New Academic Year* on page *46*).
❑	Change the status of applications (please see *Changing the Status of Applications to Offered or Accepted* on page *53*).

Complete	Description/Task
☐	Nova-T6 and Partnership Xchange (please see *Nova-T6 and Partnership Xchange* on page *56*).
☐	Transfer the curriculum and timetable to SQL (please see *Transferring the Curriculum and Timetable to SQL* on page *57*).
☐	Perform academic promotion (please see *Performing Academic Promotion* on page *60*).
☐	Export and import pupil/student group memberships (please see *Exporting and Importing Pupil/Student Group Memberships* on page *68*).
☐	Allocate applicants to registration group/classes (please see *Allocating Applicants to Registration Groups/Classes* on page *69*).
☐	Print class/registration group lists for the new academic year (please see *Printing Class (Registration Group) Lists for the New Academic Year* on page *71*).
☐	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 *77*).
☐	Enter reasons for absence last year (please see *In SIMS Attendance - Entering Reasons for Absence Last Year* on page *74*).
☐	Apply the timetable to the new academic year (please see *Applying the Timetable to the New Academic Year* on page *75*).
☐	Other SIMS module processes (please see *Other SIMS Module Processes* on page *78*).

Routines for After the New Academic Year has Started

Complete	Description/Task
☐	Admit applicants (please see *Admitting Applicants* on page *79*).
☐	Re-admit applicants (please see *Re-Admitting Pupil/Students* on page *83*).
☐	Print the official register for July (please see *In SIMS Attendance - Printing the Official Register for July* on page *84*).
☐	Set up pattern of registration and periods (please see *Setting up a Pattern of Registration and Periods* on page *82*).
☐	Run housekeeping routines (please see *Running Housekeeping Routines in SIMS* on page *85*).
☐	SIMS Learning Gateway (please see *SIMS Learning Gateway* on page *86*).

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.

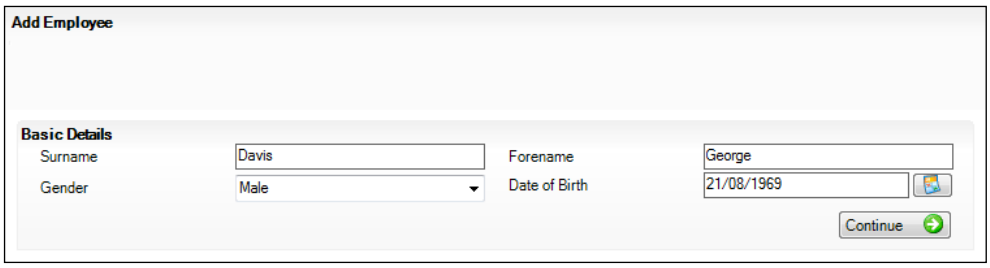
The details of new teachers joining the school should be recorded as soon as the information is available (non-teacher information can be added when known, but is not required for the end of year process). Any existing teachers who are leaving the school should be allocated a leaving date.

> *NOTES: Staff codes for anyone appearing in a timetable must be set (please see* Adding Staff Codes and Roles for Timetabled and Cover Staff *on page* 36*). Nova-T users must make sure that the* ***Staff Code*** *for anyone to be imported into a timetable is the same in both Nova-T6 and SIMS.*
>
> *When adding new rooms, the* ***Room Code*** *must be the same in both Nova-T6 and SIMS.*

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.

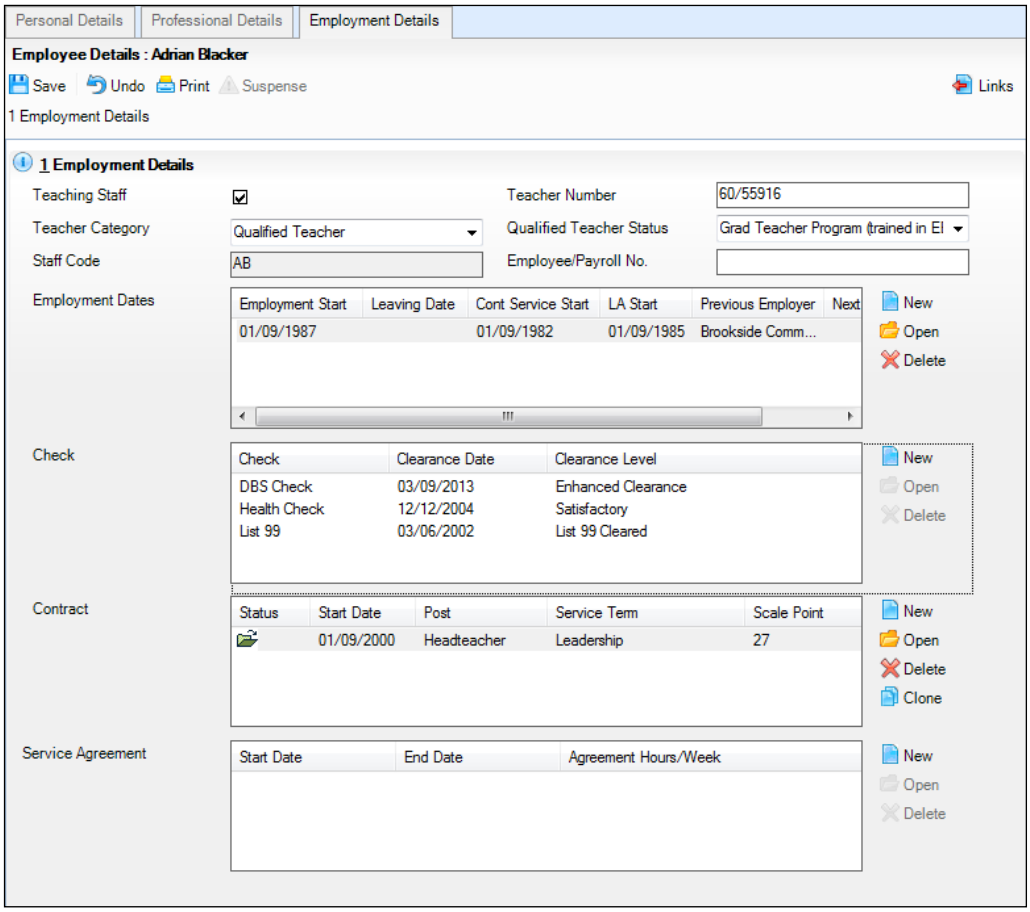


2. Enter the **Surname**, **Forename**, and then select their **Gender** from the drop-down list.
3. Enter the **Date of Birth** in dd/mm/yyyy format or click the **Calendar** button to select the required date.

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. It was previously necessary to select the **Teaching Staff** check box for all staff to be timetabled. This is now achieved via **Focus | Person | Manage Classroom Staff** (or, once the record has been saved, by clicking **Classroom Staff Details** in the **Links** panel (please see* Adding Staff Codes and Roles for Timetabled and Cover Staff *on page* 36*)).*

7. Select the required **Teacher Category** (e.g. **Qualified Teacher**) 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.

> *NOTE: Staff codes for anyone appearing in a timetable must be set (please see* Adding Staff Codes and Roles for Timetabled and Cover Staff *on page* 36*). Nova-T users must make sure that the **Staff Code** for anyone to be imported into a timetable is the same in both Nova-T6 and SIMS.*
>
> *When adding new rooms, the **Room Code** must be the same in both Nova-T and SIMS.*

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**

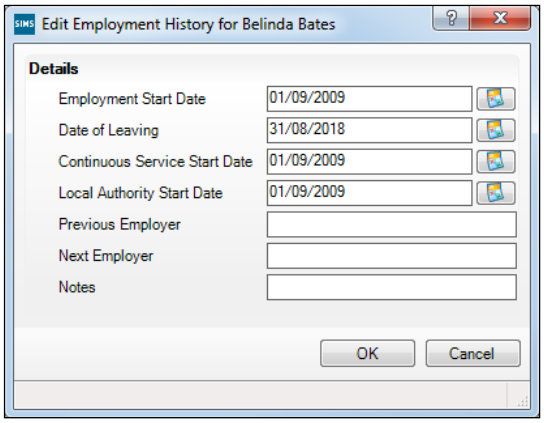
Adding Leaving Dates for Existing Staff Members in Personnel

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

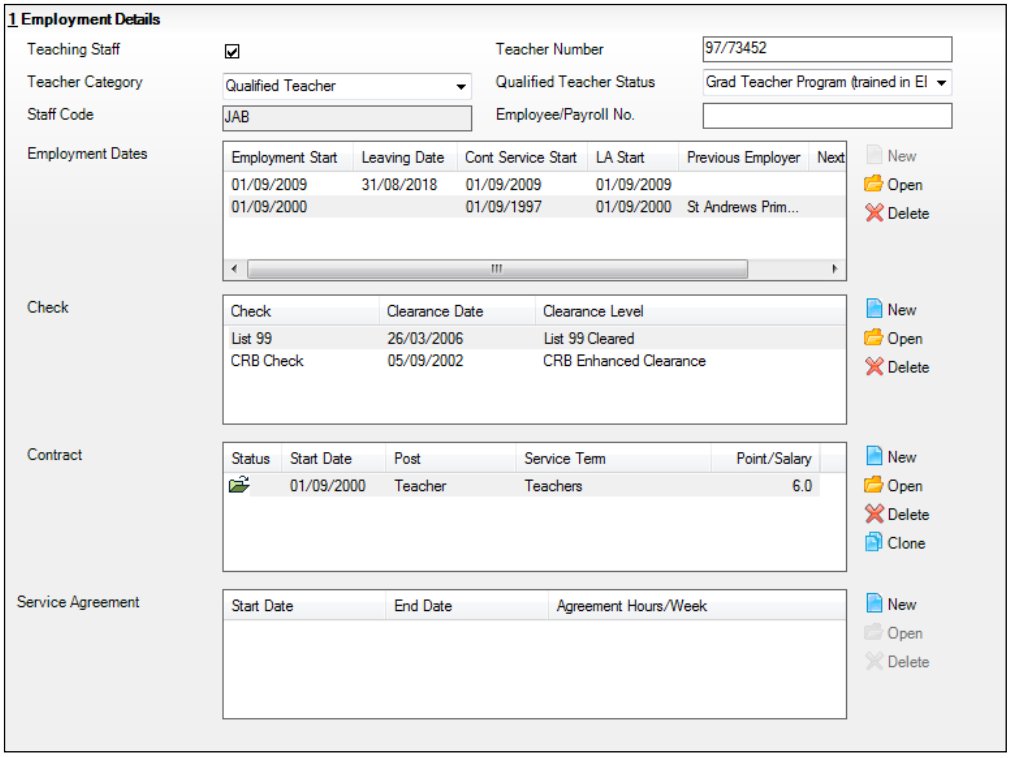
> *NOTES for Nova-T6 users: When the timetable is exported from Nova-T6 to SQL, a teacher's assignment to a class will be transferred only if the teacher is on-roll for the whole period between the start date and the end date of the export. If the end date of the export is the end of the Summer term, a class whose teacher has a leaving date before then will be transferred without a teacher, for the entire date range of the export.*

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

Creating the New Academic Year

*NOTE: Options users may have already created a new academic year. This can be checked by selecting **Focus | School | School Diary** to display the School Diary. If already created, the new academic year appears in the list adjacent to the diary and does therefore not need to be recreated.*

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 supplied automatically.

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

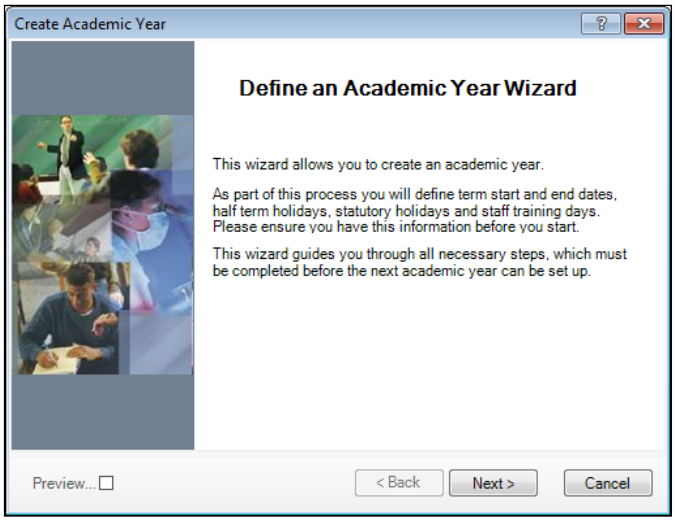
Any dates within the start and end dates of the academic year that are not term dates or training days, are considered to be holidays. This prevents the need to manually enter holidays (apart from half-terms and bank holidays).

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:

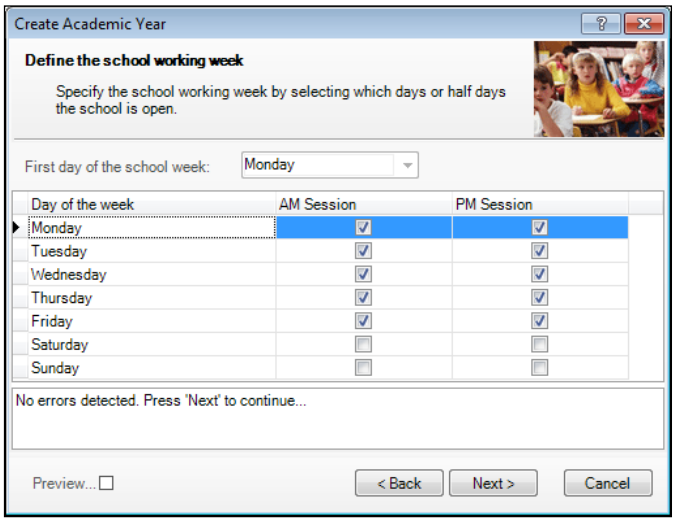
- Recorded any changes to teaching staff (adding any new teachers and dates of leaving for any leavers).
- Ensured that you have the new academic year term dates, training days, etc. to hand.

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.

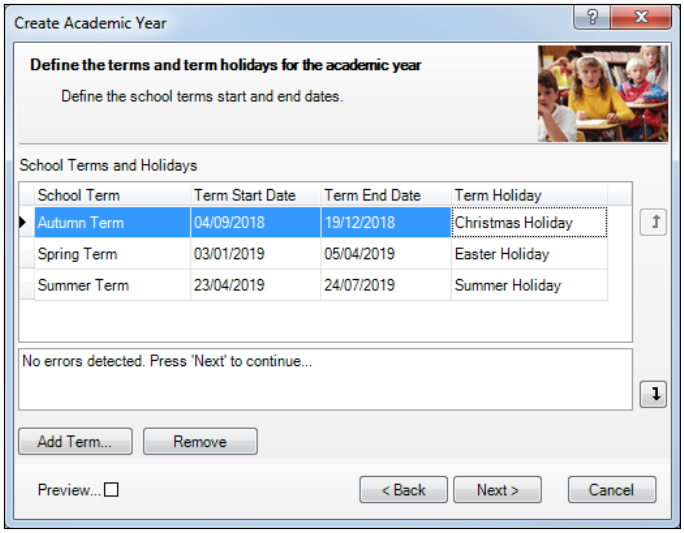
1. Define the days when the school will be open by selecting the check box(es) adjacent to each required day, including both AM and PM sessions, as required. **AM Session** and **PM Session** check boxes are selected by default for Monday through to Friday.

> *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

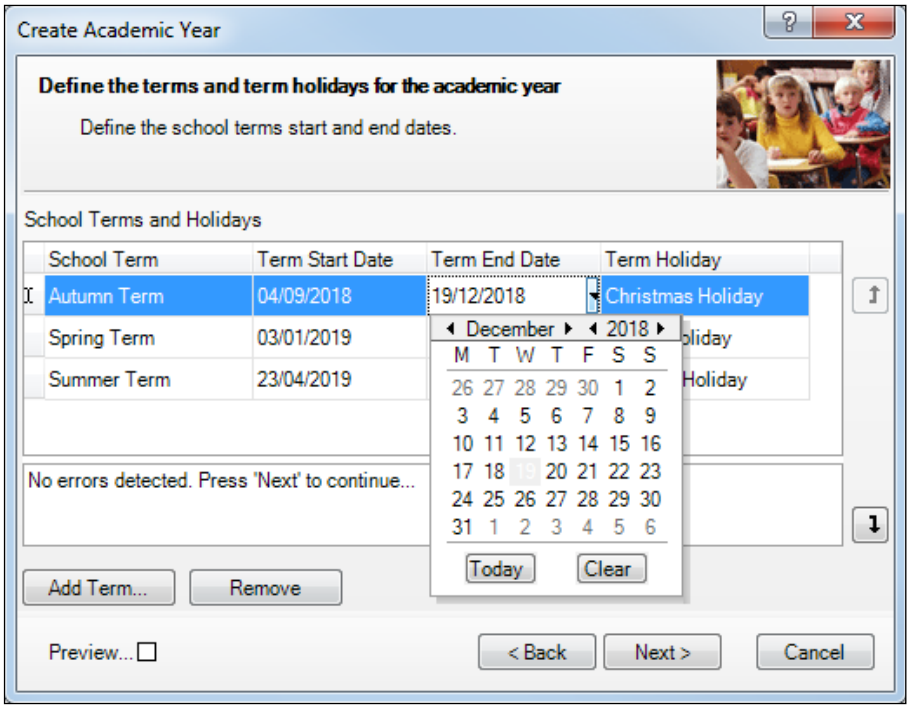
When entering term dates, the start date should always be the date the term starts, even if pupil/students are not in school on those days.



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.

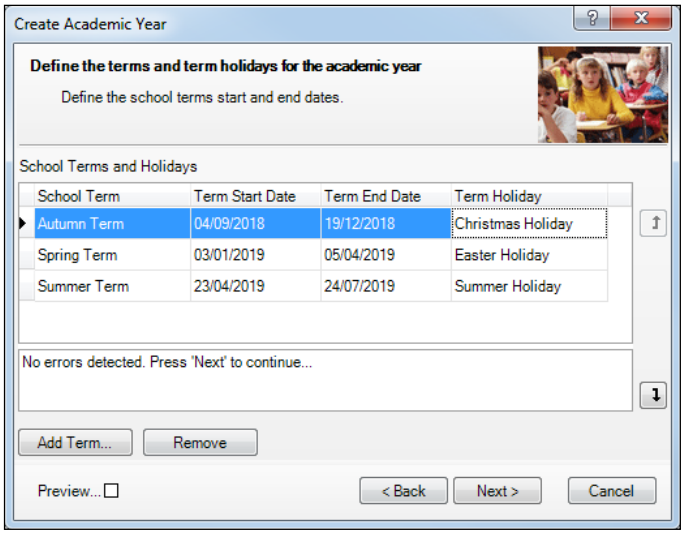
> *NOTE: Schools that have more than three terms in their academic year need to add additional terms (please see* Adding Additional School Terms *on page* 12*).*

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.



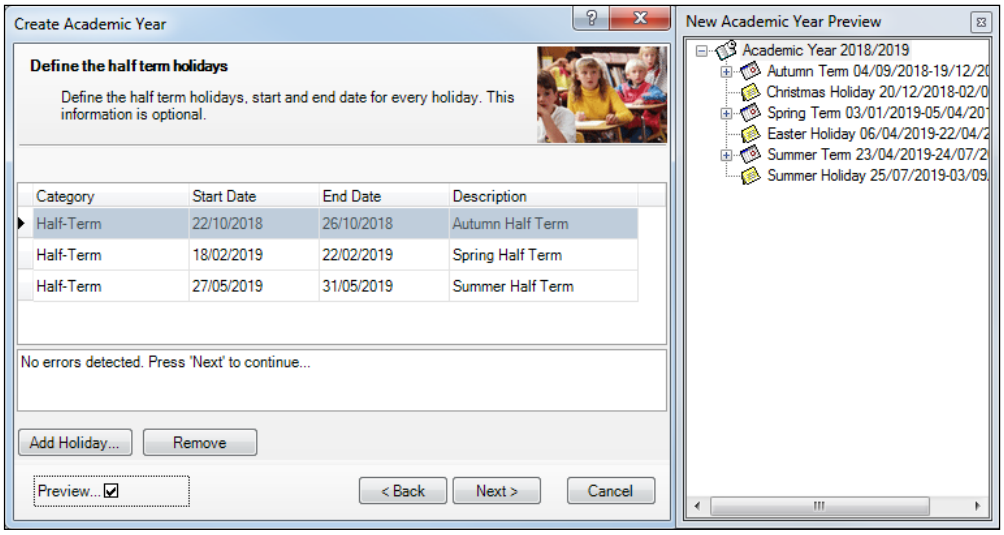
> *NOTE: You can overtype the name of the term in the **School Term** column if a different name is required.*

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.*



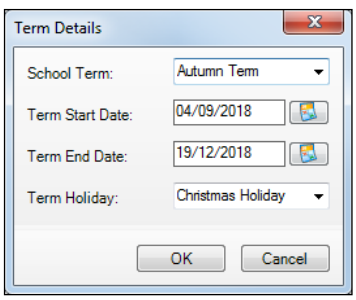
From this point onwards, you can select the **Preview** check box in the wizard to display a preview panel on the right-hand side of the wizard. The preview panel updates based on the selections you make throughout the process. Deselect the **Preview** check box whenever you want to hide the preview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

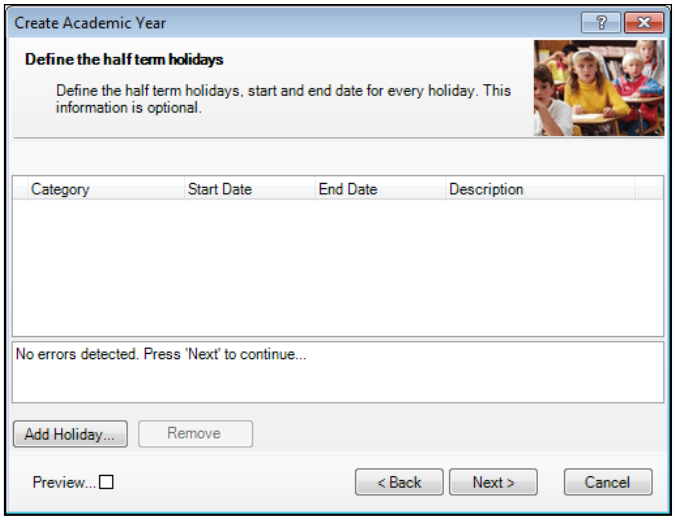
Calendar button

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.

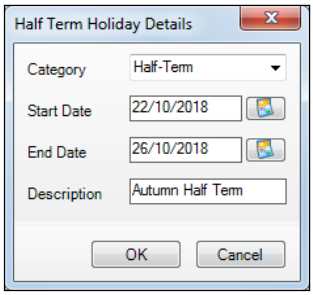
Defining Half Term Holidays

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.

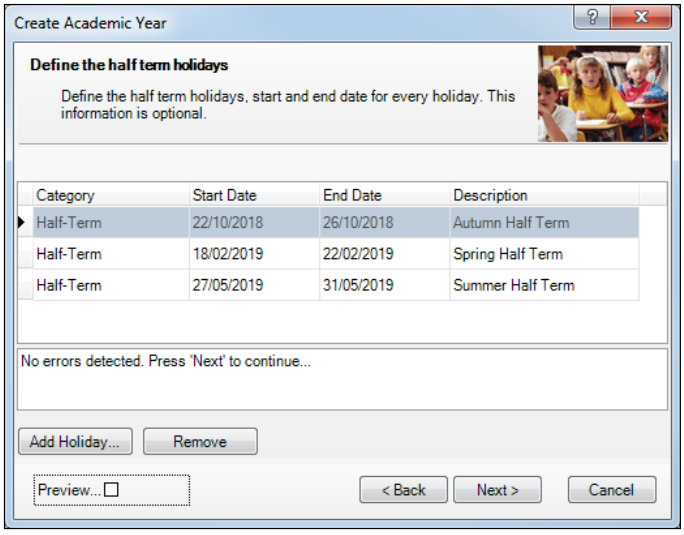
> *NOTE: You do not need to define half-term holidays if you have created a six term academic year, where the half-term dates fall between the terms.*



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



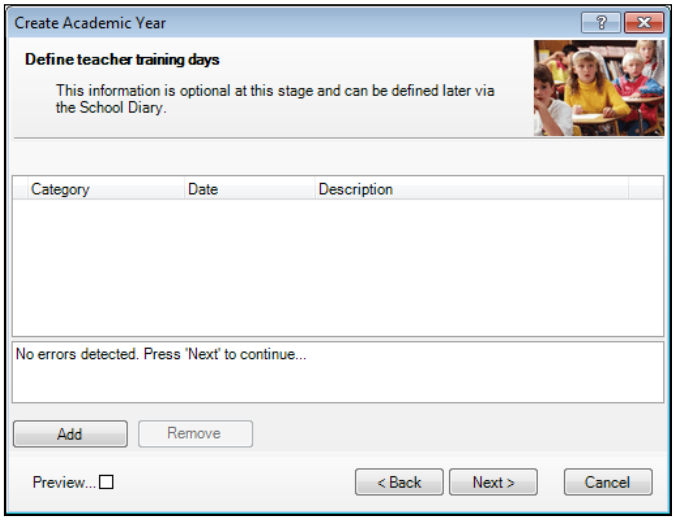
2. Select **Half-Term** from the **Category** drop-down list.
3. Enter the **Start Date** and **End Date** for the half-term holiday in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.
4. Enter a **Description** for the half-term holiday 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.



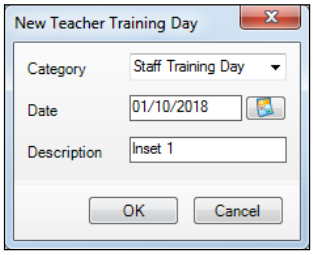
7. Click the **Next** button to display the **Define teacher training days** page.

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**).

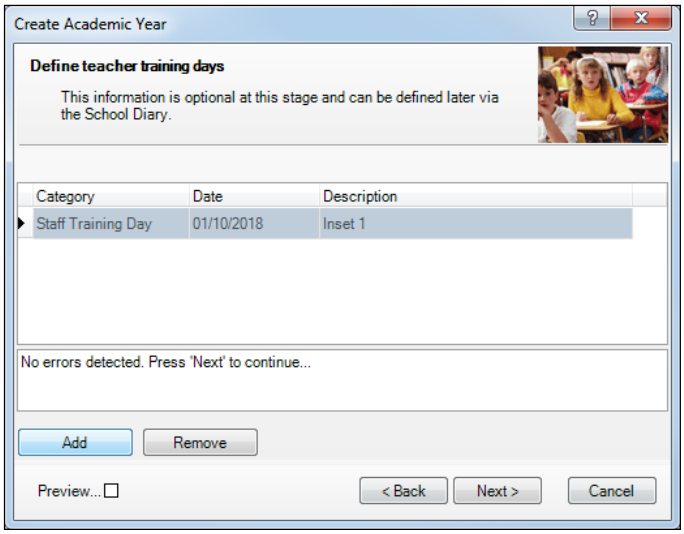


1. From the **Define teacher training days** page, click the **Add** button to display the **New Teacher Training Day** dialog.



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.

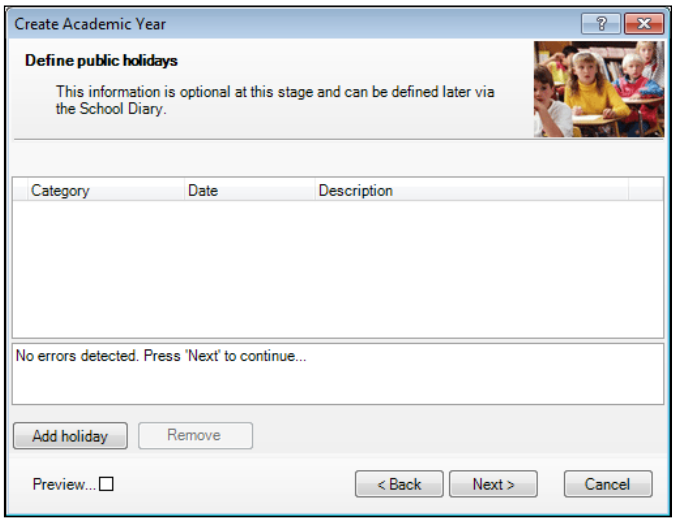
5. Click the **OK** button to add the teacher training day. Repeat for any other required teacher training days.



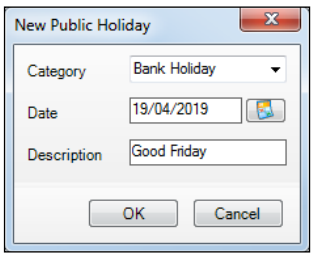
6. Click the **Next** button to display the **Define public holidays** page.

Defining Public Holidays

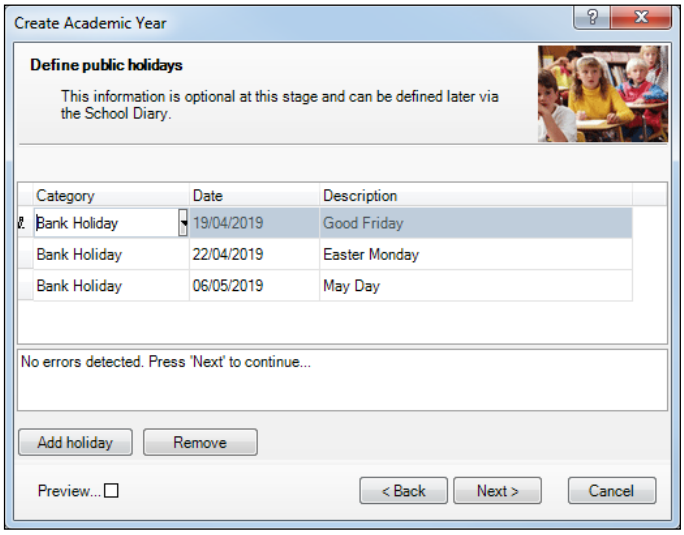
In addition to other dates during term time, you will also need to specify any public holidays, such as Bank Holidays, that occur during term time.



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.

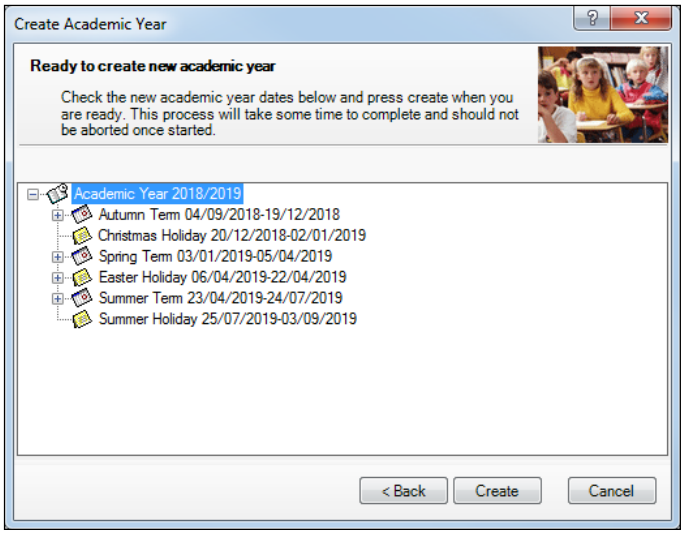


6. Click the **Next** button to display the **Ready to create new academic year** page.

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.

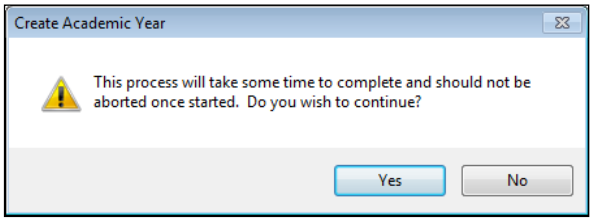
Please be aware that this process may take a long time because the system creates attendance records for the new year.



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.

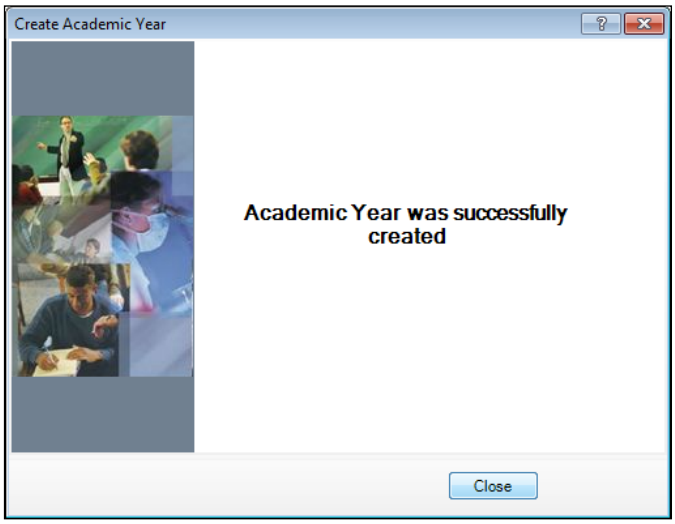
   Once you are sure that the information is correct, click the **Create** button to create the new academic year. If there are any anomalies in your settings, you are asked to confirm whether you wish to proceed or review your settings. If you are certain the data is correct, you can proceed.

   The following warning message is displayed:

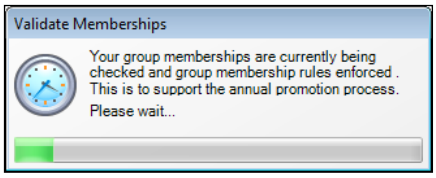


   Progress is displayed via a progress indicator at the bottom of the wizard.

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 Sixth Form 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.

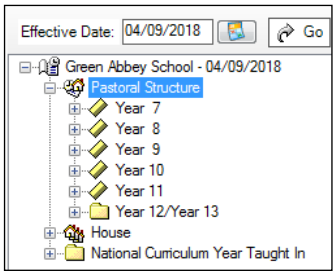
If you want teachers to be promoted with their pupil/students in the next academic year, this can be achieved as part of the pastoral promotion process (please see Setting up the Promotion Mapping for the New Academic Year *on page* 46*).*

If an additional year group is required, e.g. a Sixth Form 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*). It is essential that the short name of each year group matches exactly the name of the corresponding year in Nova-T, so that the transfer of the curriculum plan and timetable to SQL operates correctly.*

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.*



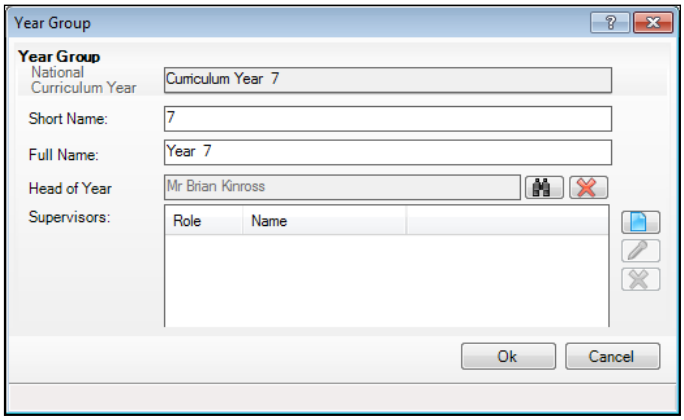
2. The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information.

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**

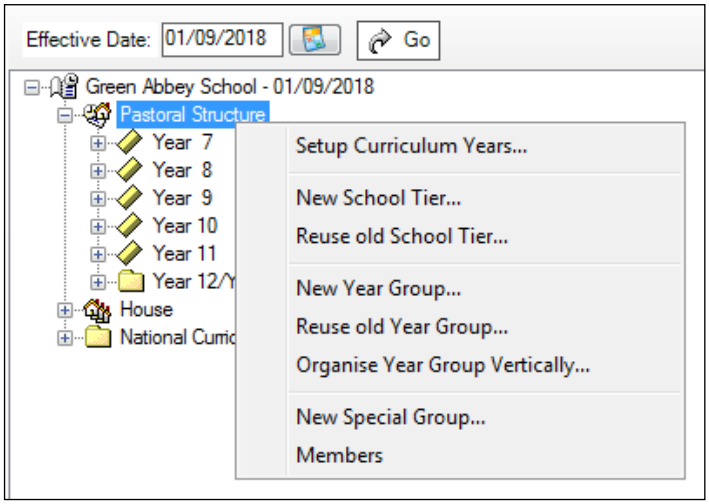
Adding New Year Groups

If an additional year group is required, such as the introduction of a sixth form, this should be added before admission groups are created to ensure that the new year group is available for selection.

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 *20*).

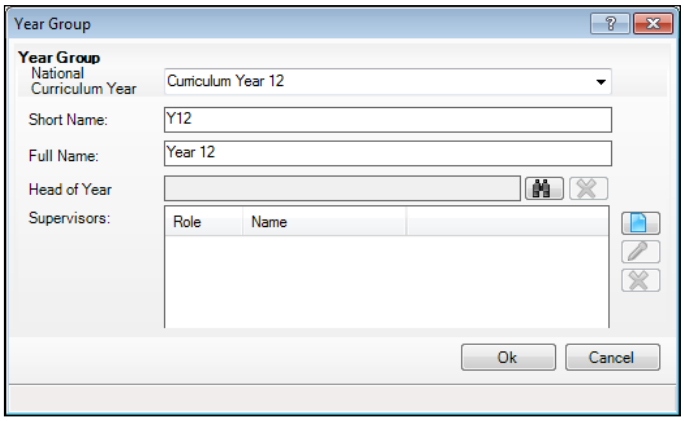
*NOTE: If you are adding a year group because you are extending the range of years, you will also need to set up a National Curriculum year. This is achieved by right-clicking the **Pastoral Structure** item in the navigation tree, selecting **Setup Curriculum Years** then selecting the required curriculum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



Errors are displayed at the bottom of the screen until years and classes have been added.

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.



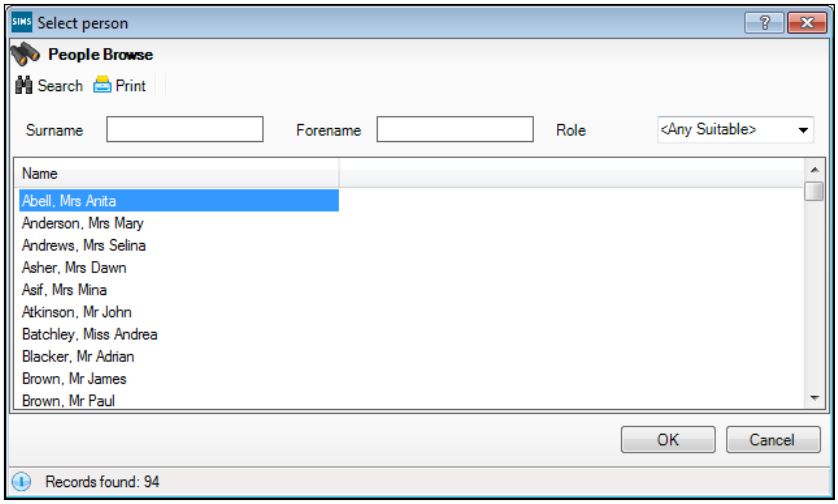
3. Select the **National Curriculum Year** with which the year group will be associated, from the drop-down list.
4. Enter a **Short Name** and a **Full Name** for the year group.

The **Full Name** (up to 32 characters) is used throughout SIMS to identify the year group (e.g. `Year 12`). The **Short Name** (up to 10 characters) is used for column headings in reports (e.g. `Y12`). 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.

Browser button

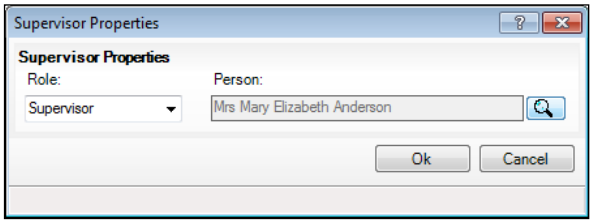
6. Enter a **Surname** and/or **Forename** then click the **Search** button. Alternatively, leave the fields blank to search for all staff.



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.

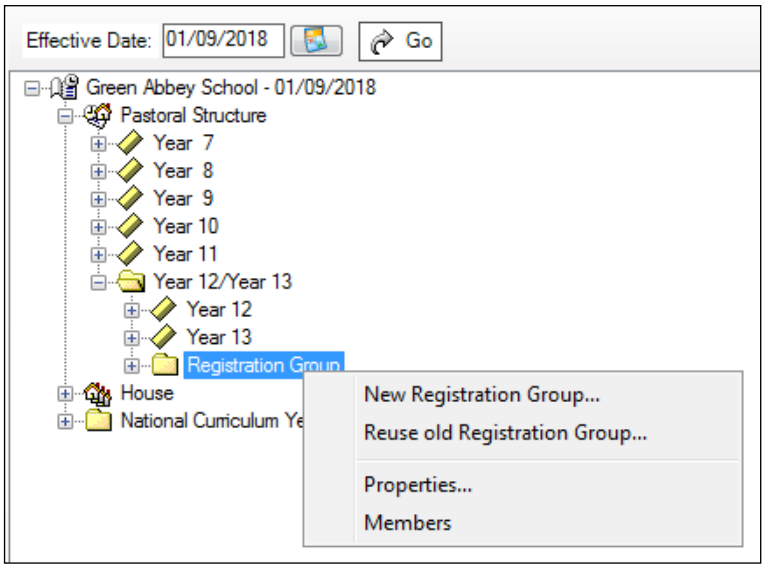
☐ **Completed**

Adding Classes (Registration Groups)

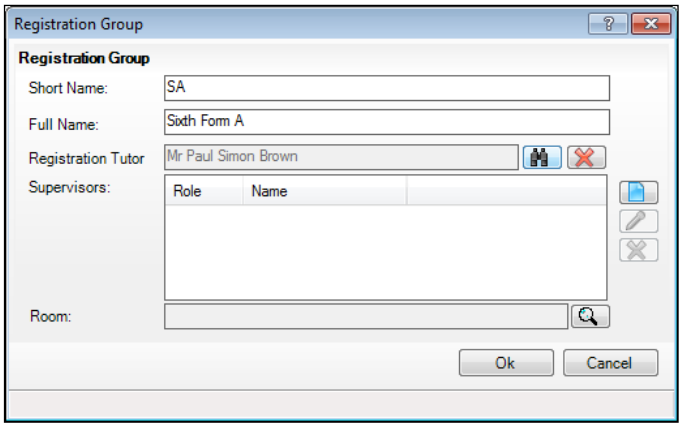
You are strongly advised to check whether the name you intend to use for a new class has not previously been used. This is achieved by expanding the Pastoral Structure and appropriate year group then right-clicking the **Registration Group** folder and selecting **Reuse Old Registration Groups** from 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 *20*).
2. Expand the year group to which you wish to add the class by clicking the adjacent **+** icon.



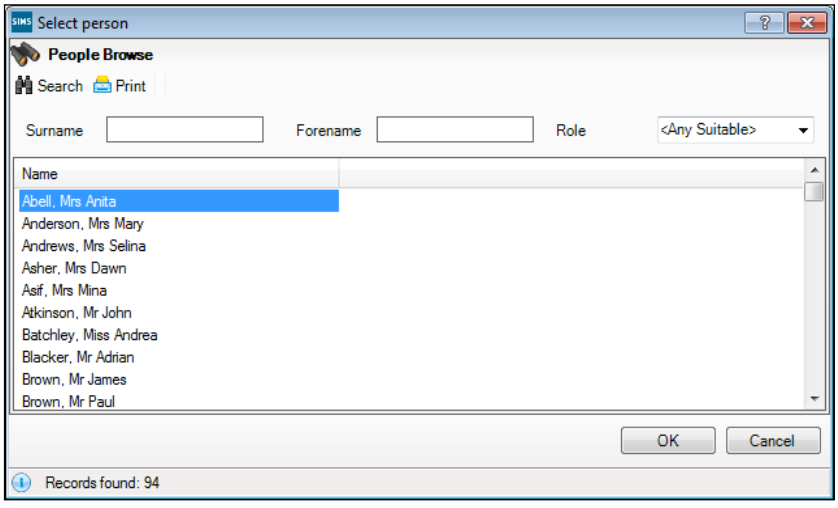
3. Right-click the **Registration Group** folder and select **New Registration Group** from the pop-up menu to display the **Registration Group** dialog.



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

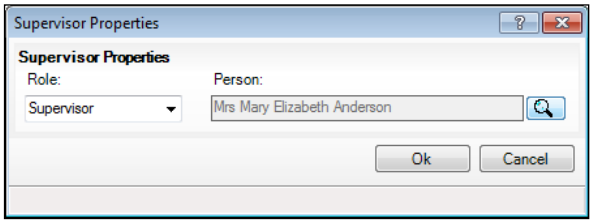
   The **Full Name** (up to 32 characters) is used throughout SIMS to identify the class, e.g. `Sixth Form A`. The **Short Name** (up to 10 characters) is used for column headings in reports. Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should 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 **Registration Group** 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

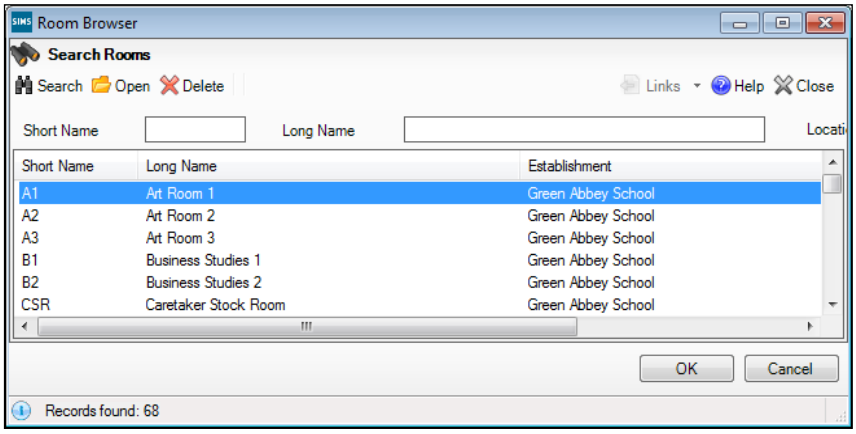


- Select the **Role** from the drop-down list then click the **Browser** button adjacent to the **Person** field to open the **Select Person** browser. Select the required person in the same way as for the Registration Tutor.

  *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 **8AB** after a teacher named Anita Brown. At the end of the current academic year, Anita will move up with her class, which becomes **9AB**.

If you rename **8AB** to **9AB** then all the pupil/students in **8AB** will be recorded as always having been in **9AB** because the history is also amended.

In this circumstance, all you need to do is to create a new class called **9AB** 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 **8AB** will move up to **9AB** at the start of the new academic year (please see *Setting up the Promotion Mapping for the New Academic Year* on page *46*).

Example 2:

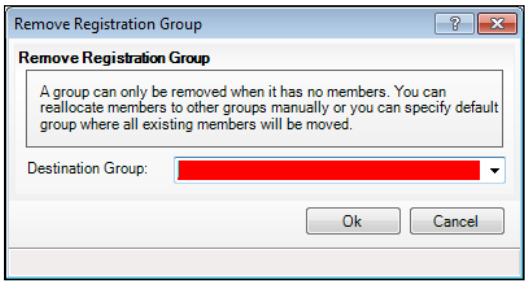
A class is currently called **8SL** after a teacher named Sonia Lovell. Sonia is leaving and will be replaced by Andrew White during the same academic year.

If you rename **8SL** to **8AW** then all the pupil/students in **8SL** will be recorded as always having been in **8AW** 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 *24*) in the current pastoral structure (e.g. 2018/2019) labelled with the new class name (e.g. `8AW`).

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. `8AW`) 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 **8SL**.

Changing Year Group Horizontal/Vertical Structures

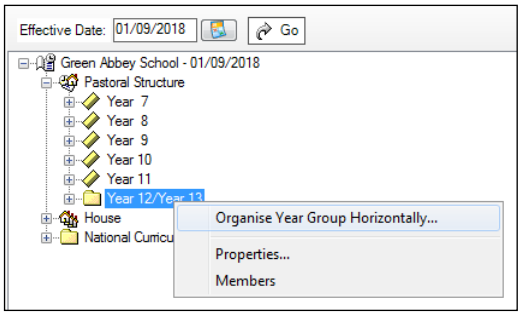
There may be occasions where you want the pastoral structure for the new academic year to be different to that of the current year. For example:

- 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.

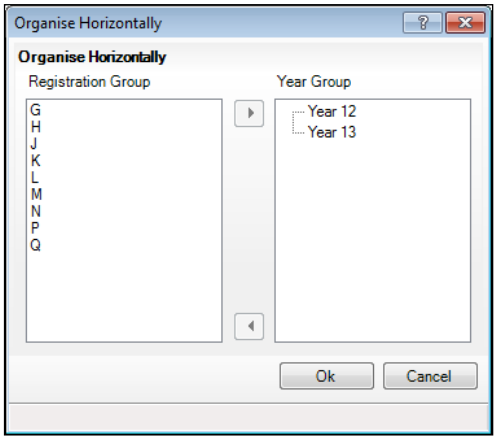
Changing from a Vertical to a Horizontal Structure

This process may be required if, for example, your pupil/student numbers have increased. This would enable previously merged years, such as Year 12/Year 13 (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 *20*).
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. **Year 12/Year 13**.

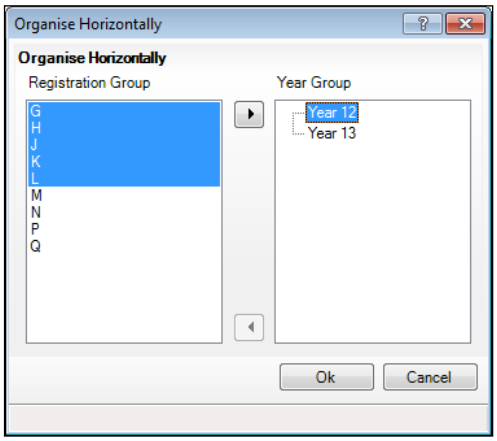


3. Right-click the vertically organised year group and select **Organise Year Group Horizontally** from the pop-up menu to display the **Organise Horizontally** dialog.



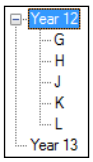
This dialog enables you to determine the class(es) that should be attached to each year.

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.

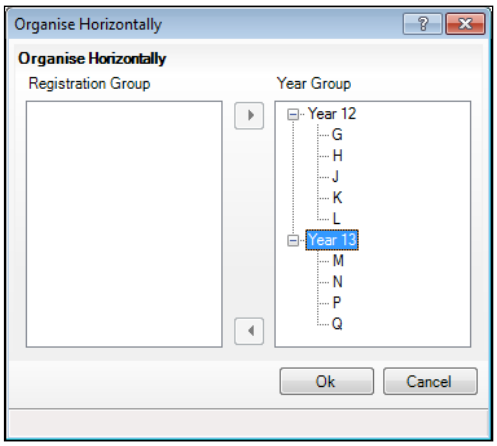


In the previous example, **G**, **H**, **J**, **K** and **L** are being attached to **Year 12**.

5. Click the right arrow button in the centre of the dialog to attach the selected registration group(s) to **Year 12**. The registration group(s) are moved under the **Year 12** heading, as shown in the following example.



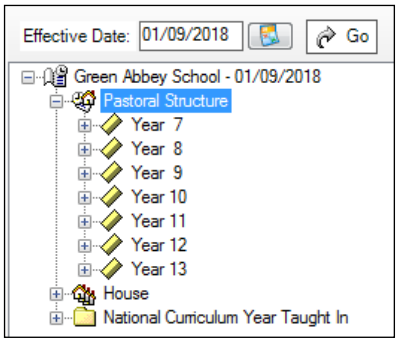
6. Repeat steps 4 and 5 for all the remaining classes in the **Registration Group** panel.



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

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

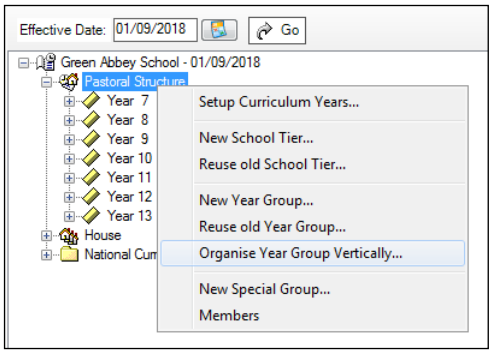
The pastoral structure should now show the two previously merged years as separate years, as shown in the following example.



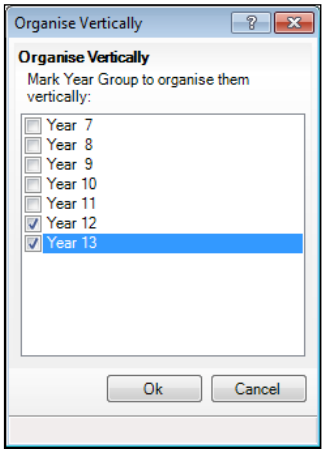
Changing from a Horizontal to a Vertical Structure

This process may be required if, for example, your pupil/student numbers have decreased. This could allow previously separate years, such as Year 12 and Year 13 (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.

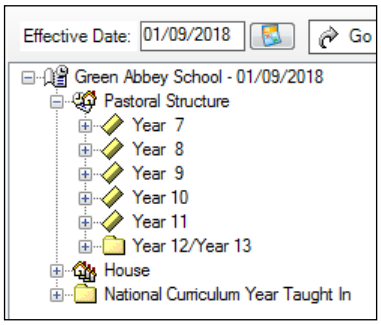
1. Select next year's pastoral structure (please see *Opening the Structure of the New Academic Year* on page *20*).



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 of the year groups you wish to merge into a vertical structure then click the **Ok** button. In the previous example, **Year 12** and **Year 13** 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. In a Secondary school, an intake group could be created for Year 7 with admission groups for either Feeder Schools or Registration Groups.

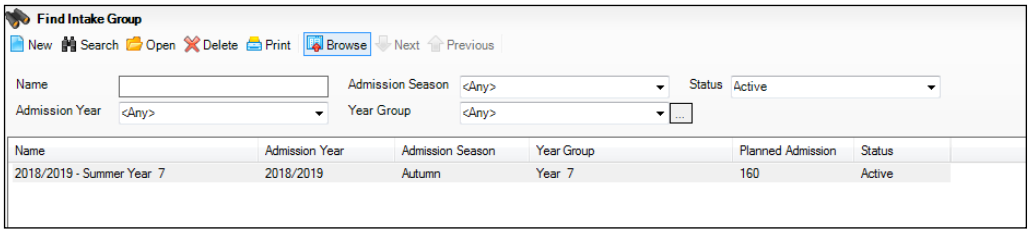
IMPORTANT NOTE: *Please ensure that the* ***Date of Admission*** *lies within the new academic year. We recommend that the date of admission is the day on which the applicants will actually arrive in school, i.e. not a teacher training day. However, please check with your Local Authority for advice on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

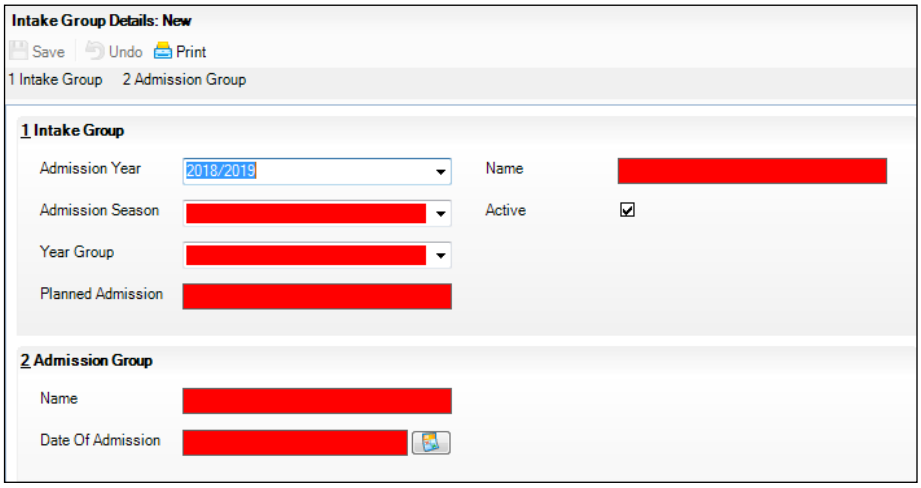
This is also a good time to delete or make inactive any unwanted admission groups. Detailed instructions on adding and maintaining admission groups can be found in the appropriate *Admissions* handbook.

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

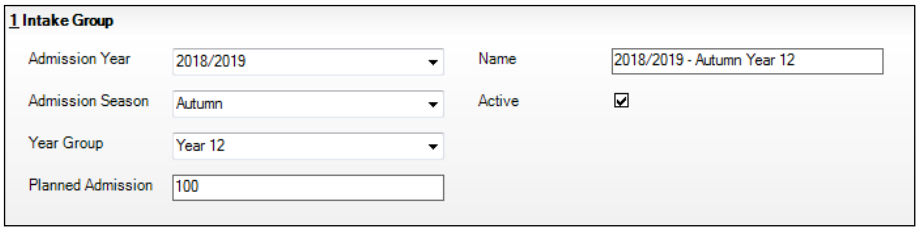


2. Carry out a search to ensure that the intake group does not already exist.
3. Click the **New** button to display the **Intake Group Details** page. Mandatory fields are highlighted in red. The page will look slightly different depending on whether you have set up SIMS to allow multiple admission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

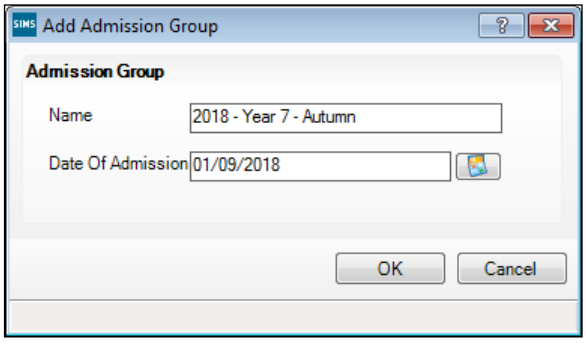
7. Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field.
8. Only Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can select a previously defined admissions policy from the Admission Policy drop-down 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 7**. 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)*.

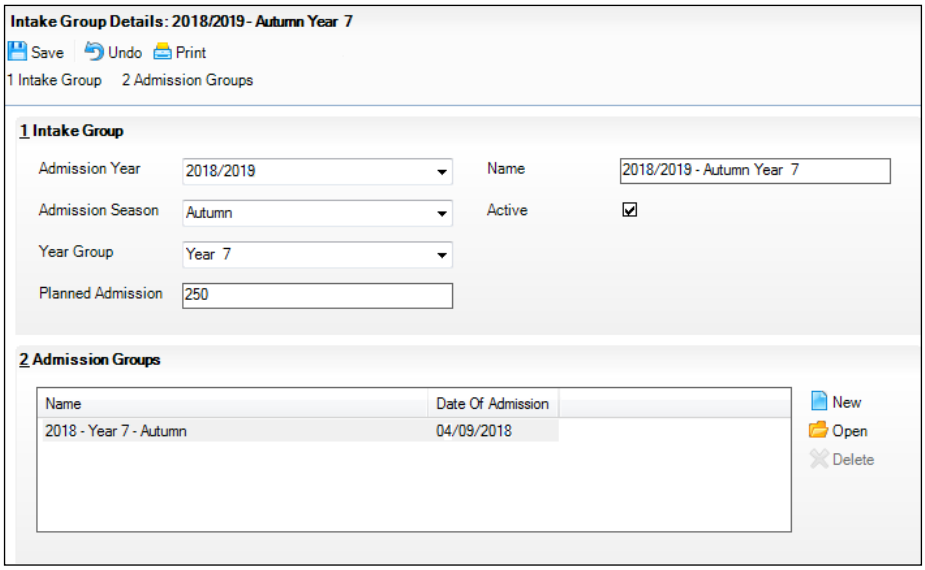
1. From the **Admission Groups** panel, click the **New** button to display the **Add Admission Group** dialog.



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 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**

Adding Staff Codes and Roles for Timetabled and Cover Staff

To ensure that staff are available for timetabling, their staff codes must be the same in both Nova-T and SIMS.

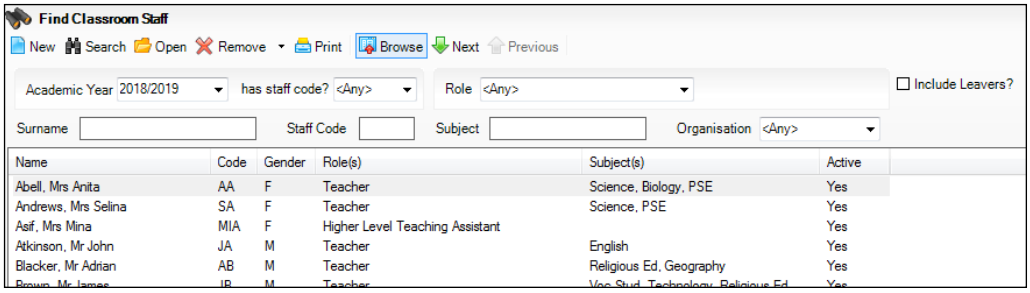
In addition, timetabled staff must be assigned a staff role. Staff can be given one or more roles according to the duties they perform. Generally, a person will have a single Staff Role.

> *NOTE: Anyone you may wish to make available to provide class cover in Cover or anyone who you may wish to be assigned as Additional staff must also be set up as classroom staff, i.e. they must be given a **Staff Code** and a staff **Role**.*

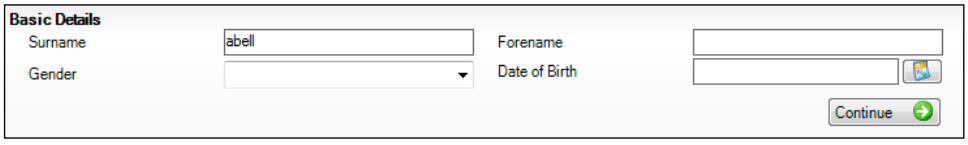
For more detailed information, please refer to the *Managing Classroom Staff* chapter in the *Academic Management* handbook.

Any staff on the timetable in Nova-T or anyone you wish to make available in Cover who are not displayed in the **Manage Classroom Staff** list must be added.

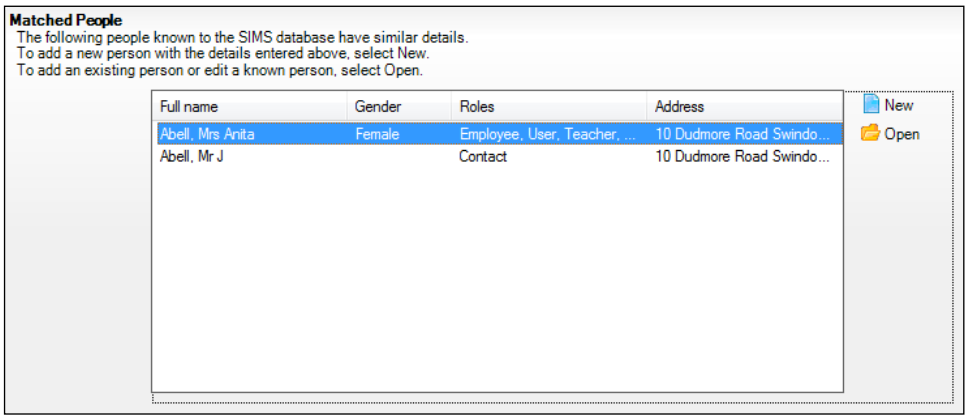
1. Select **Focus | Person | Manage Classroom Staff** to display the **Find Classroom Staff** browser.
2. Check that the member of staff has not already been allocated a **Staff Code** by selecting the new 2018/2019 academic year from the **Academic Year** drop-down list. By default, the browser displays all staff who have been assigned a **Staff Code** via the **Manage Classroom Staff** area.



3. If the required member of staff is not listed they will need to be added. Click the **New** button. If the required staff member is listed, double-click their record then proceed to step 5.



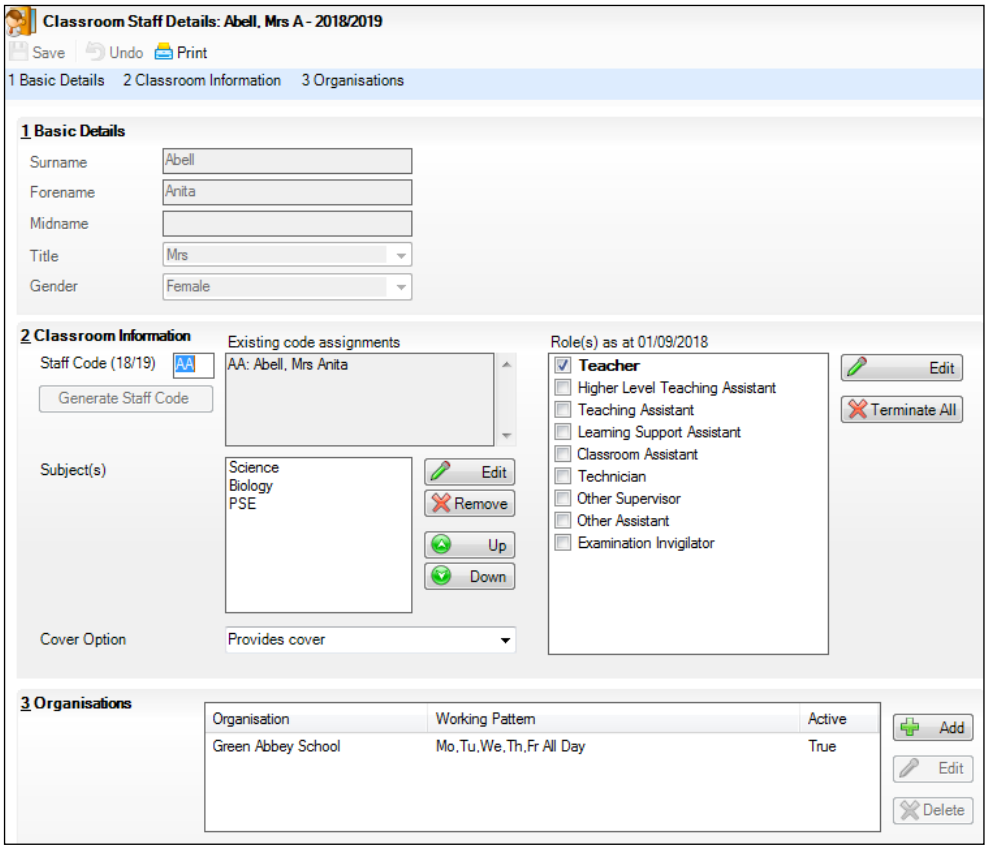
4. Search for the required member of staff by entering the appropriate search criteria in the **Basic Details** panel, then click the **Continue** button. All people recorded in SIMS who match the search criteria entered are displayed in the **Matched People** list.



5. If the required person is listed, highlight their name and then click the **Open** button to display the **Manage Classroom Staff** page.

> ***IMPORTANT NOTE:*** *Create a new record by clicking the* ***New*** *button only if you are sure that the person has not already been recorded in SIMS (e.g. as an employee, contact, etc.). If they have already been recorded in SIMS, you must select them from the* ***Matched People*** *panel.*

The **Classroom Staff Details** page displays any existing **Staff Code** and/or **Role(s)**.



6. The **Staff Code (18/19)** field displays the **Staff Code** assigned to the selected person for 2018/2019. The code can be edited, if required. This updates the **Existing code assignments** list with the name of any staff member whose code matches that which is entered. If the code entered matches a code already assigned to another person, the background colour of the field changes to red and a message is displayed on the Status Bar. It is not possible to save the record until a unique code (across the 2018/2019 academic year) has been entered.
7. Select the staff member's **Role(s)** in the **Role(s)** panel.
8. Click the **Save** button to save the changes.

IMPORTANT NOTE: *Once a person has been made a member of Classroom Staff, their Staff Code can be maintained in Academic Management only. It will no longer be possible to edit the code in Personnel. In addition, any staff added to SIMS via Manage Classroom Staff are not given an* ***Employment Start*** *date. To record the start date, edit their record via* ***Focus | Person | Staff*** *ensuring that a* ***Status*** *of* ***All*** *is selected when searching in the browser.*

☐ **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)

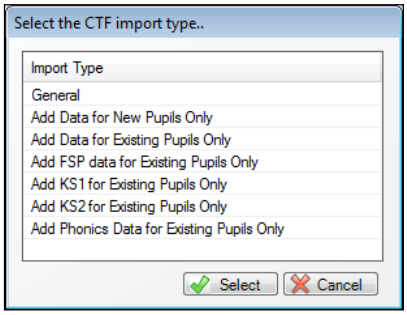
This section provides a summary of the steps required to import a CTF.

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

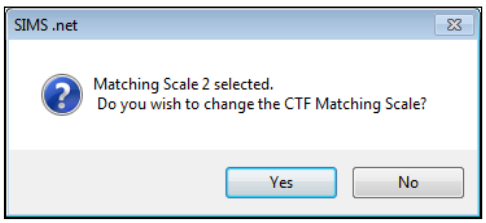
If any of the pupil/students in the CTF already exist in the system, any blank fields in their record are updated with data from the CTF. Any existing data is not overwritten, as it is deemed to be the most up-to-date information. Any such information is highlighted in the Exception Log that is displayed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

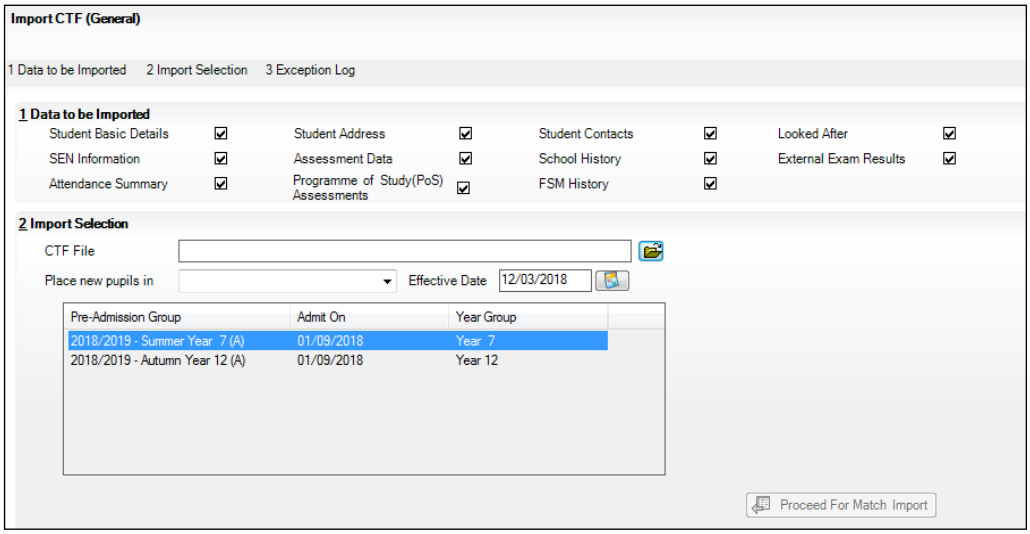
1. Select **Routines | Data In | CTF | Import CTF** to display the **Select the CTF import type** dialog.



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 students** 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**

Recording Leavers and Updating Course Memberships

This section provides a summary of the steps required to record leaver information in SIMS. For more information, please refer to the *Managing Pupil/Students* handbook.

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 11 are leaving 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 their date of leaving as this also affects the history (unless they had a date of leaving, but did not actually leave, i.e. they change their mind).

To allow the automatic procedures to help you with course completion information for Post-16 students, it is necessary to consider when to make use of the Leavers routine. Some schools will have left the course completion date as the default date when all classes finish. Such a date is not correct for many Post-16 students who will finish the course and leave the school some weeks before the rest of the school finishes for the year. If you make use of the Leavers routine in advance of the pupil/students actually leaving, SIMS deals with this problem for you. The end date for the course will be set in line with this 'expected' leaving date and when the School Census is run, the courses will be interpreted as having been completed. If the Leavers routine is run after the pupil/students have actually left and the course end date was in the future, SIMS can only interpret this as a withdrawal or transfer before the course was completed. Obviously, Maintain Course can be run (via ***Tools | Academic Management | Course Manager | Maintain Course****) to rectify this for each pupil/student, but it is much easier if the Leavers routine is run at the appropriate time.*

Update Course Memberships should be run (via ***Tools | Academic Management | Course Manager | Update Course Memberships****) before moving the system to the new academic year and should be run again after moving to the new academic year, once class information is in place. Update Course Membership is an Academic Management routine and like other routines in this area, it is academic year based. If you forget to run Update Course Memberships before moving to the new year, you can easily solve the problem by going back to the old year and running Update Course Membership.*

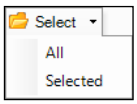
Similarly, if you forget to run Update Course Memberships, as soon as class information is in place, you can run it in the new academic year. However, you should be aware that course membership is much like other group membership, and courses are set active or inactive at the start of the day, depending on what membership they have at the start of the day.

So, if you do not run Update Course Memberships until the actual day of the census, the courses will remain set to inactive until the next day. Active and inactive is only a display parameter, but it could cause unnecessary confusion on census day.

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

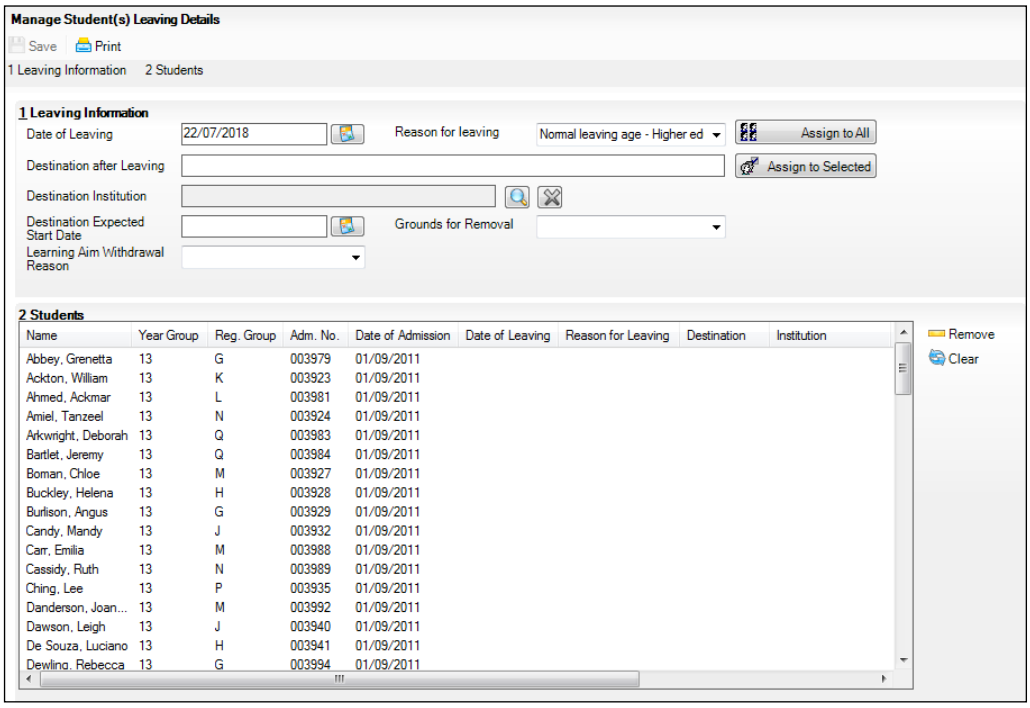
To ensure that information required for statutory returns, such as the School Census, is accurate and up-to-date, it is recommended that you check that all leavers have at least the minimum statutory information recorded before making them a leaver, e.g. Ethnicity.

1. Select **Routines | Pupil** (or **Student**) **| Leavers** to display the **Find Students(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, such as **Normal leaving age - Higher education institutions**.
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 which 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**, **Destination after Leaving**, **Expected Start Date** and **Learning Aim Reason** 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**

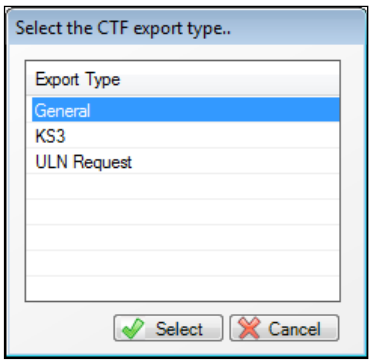
Exporting Common Transfer Files (CTFs)

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.*

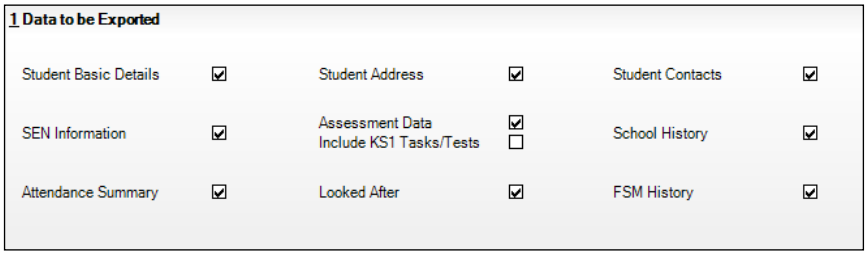
This section provides a summary of the steps required to export a CTF.

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



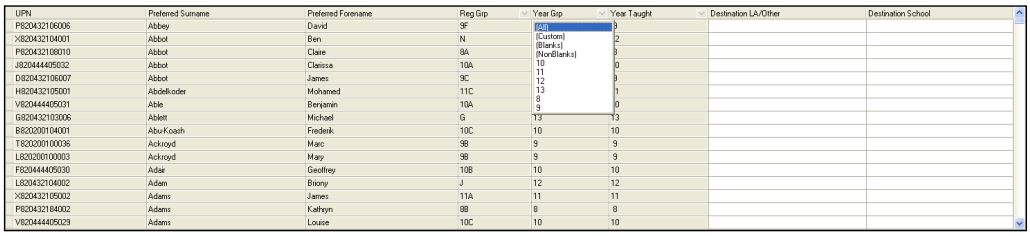
Highlight the required CTF export type then click the **Select** button to display the **Export CTF** page. The page name is appended with the option selected in the previous dialog. For detailed instruction on exporting a CTF file, please refer to the *Importing and Exporting CTFs* chapter of the *Managing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

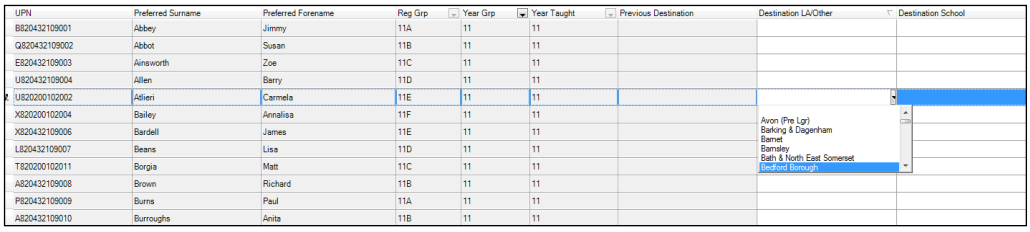


3. Select the status of the pupil/students you wish to include in the CTF file from the **View** drop-down list (e.g. **Leavers this year**) in the **Student Options** panel.

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 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 11. This is achieved by selecting the required year from the **Year Grp** drop-down list as shown in the following graphic.

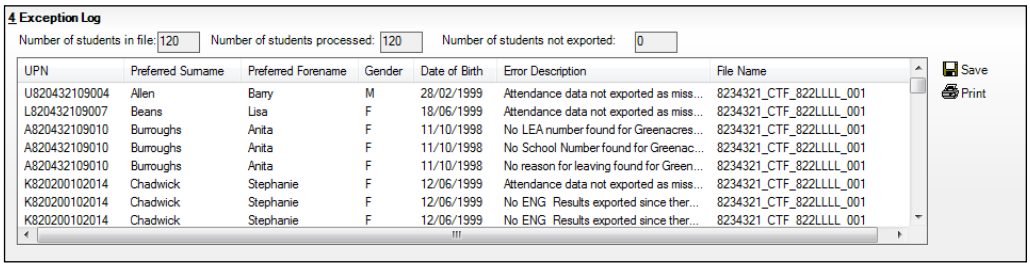


7. Select the **Destination LA/Other** or **Destination School** by clicking in the appropriate cell then selecting from the drop-down list. This can be done on an individual basis or you can select multiple pupil/students as follows:
   - Hold down the **Ctrl** key and click each pupil/student to be 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.



UPN	Preferred Surname	Preferred Forename	Gender	Date of Birth	Error Description	File Name
U820432109004	Allen	Barry	M	28/02/1999	Attendance data not exported as miss...	8234321_CTF_822LLLL_001
L820432109007	Beans	Lisa	F	18/06/1999	Attendance data not exported as miss...	8234321_CTF_822LLLL_001
A820432109010	Burroughs	Anita	F	11/10/1998	No LEA number found for Greenacres...	8234321_CTF_822LLLL_001
A820432109010	Burroughs	Anita	F	11/10/1998	No School Number found for Greenac...	8234321_CTF_822LLLL_001
A820432109010	Burroughs	Anita	F	11/10/1998	No reason for leaving found for Green...	8234321_CTF_822LLLL_001
K820200102014	Chadwick	Stephanie	F	12/06/1999	Attendance data not exported as miss...	8234321_CTF_822LLLL_001
K820200102014	Chadwick	Stephanie	F	12/06/1999	No ENG Results exported since ther...	8234321_CTF_822LLLL_001
K820200102014	Chadwick	Stephanie	F	12/06/1999	No ENG Results exported since ther...	8234321_CTF_822LLLL_001

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 *49*).

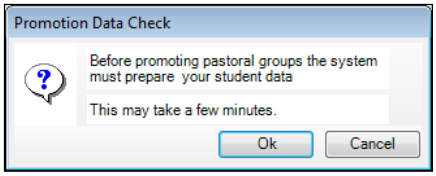
Setting the promotion mapping can be carried out at any point, as the promotion itself occurs at the beginning of the next academic year. However, it must be done before the start of the academic year.

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

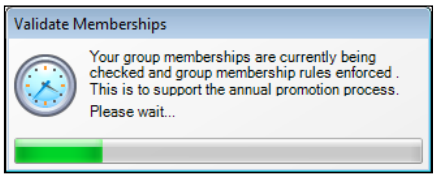
BEFORE PROCEEDING: *Please check that you have carried out the following:*

- *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.



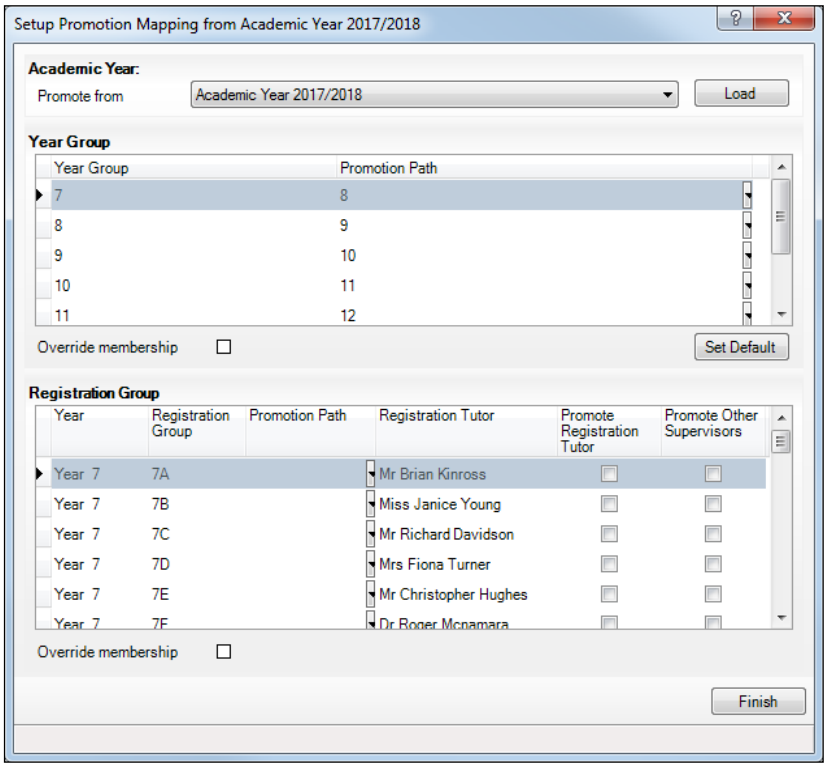
   This process may take some time to complete. Once the validation process is complete, the **Setup Promotion Mapping** dialog is displayed.

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 7 is promoted to Year 8 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.



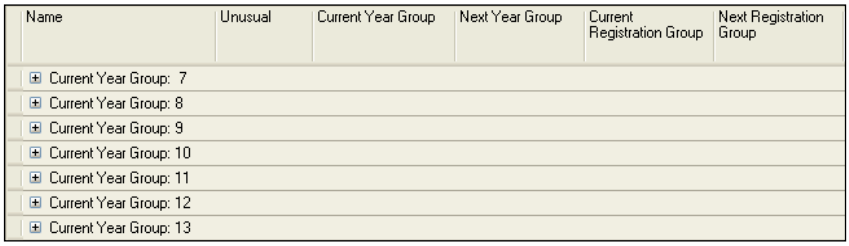
6. Review the promotion path for each class. The **Class** panel displays a list of the classes for the current academic year. Move down one class at a time by clicking in the **Registration Group** column then select the class to which the pupil/student will be promoted from the **Promotion Path** column 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 **7D** class should be promoted to the **8D** registration group and subsequently wanted them to go from **7D** to **8E**, you would need to select the **Override Membership** check box in the **Registration Group** 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.*

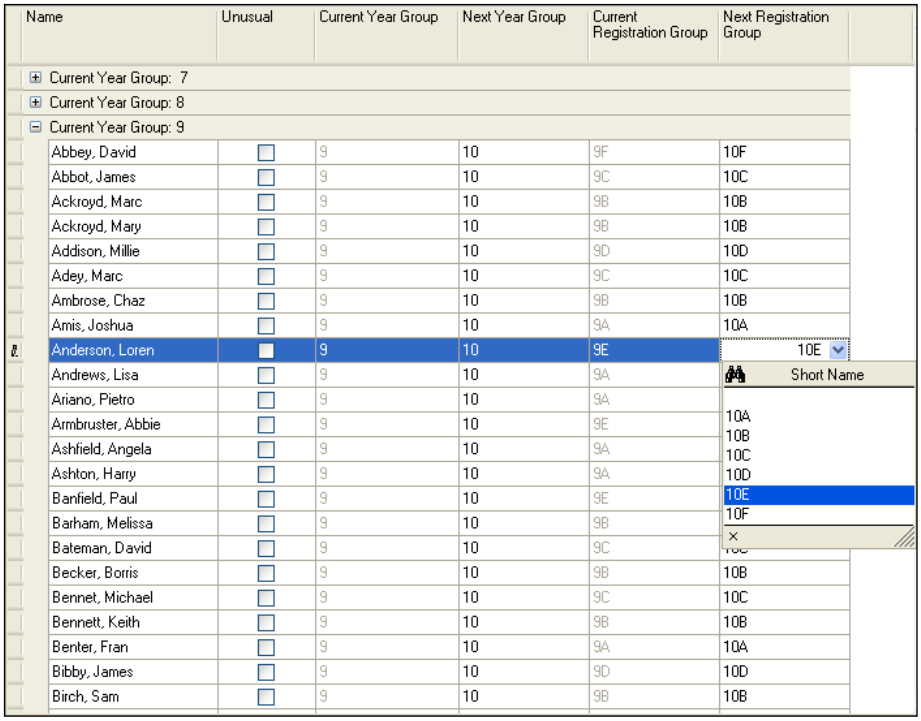
10. Click the **Finish** button and then **Save** the settings.
11. Click the **Map** button on the toolbar at any point to return to the **Setup Promotion Mapping** dialog.

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

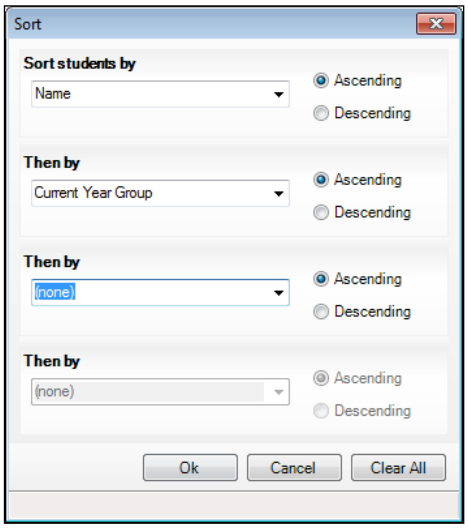


Viewing/Setting the Promotion Path for Individual Pupil/Students

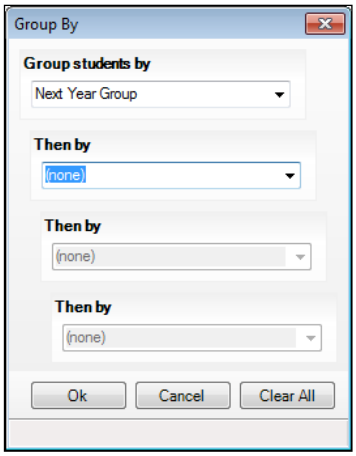
1. Double-click the current year group for which you wish to view or set individual promotion paths.



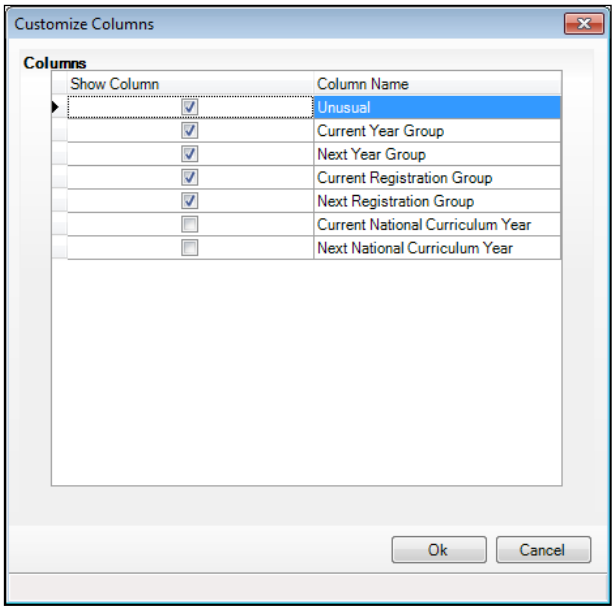
2. You can customise the view on this screen by selecting an option from the **Customize** drop-down list.
   - Select **Sort** to display the **Sort** dialog, which enables you to order the contents of the columns, as shown in the following example.



   - 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.

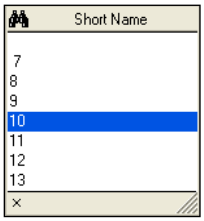
   Multiple pupil/students can be highlighted using any of the following methods:

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

McLear, Jessica	☐	9	10	9C	10C
Meally, Michelle	☐	9	10	9A	10A
Mehar, Sabrina	☐	9	10	9C	10C
Meredith, Daniel	☐	9	10	9F	10F
Moner, Jodi	☐	9	10	9E	10E
Moody, Shaun	☐	9	10	9B	10B
Moore, Steven	☐	9	10	9A	10A
Morrow, Jennifer	☐	9	10	9B	10B
Morton, Vicki	☐	9	10	9A	10A
Mullin, Ben	☐	9	10	9D	10D
Mumford, Connor	☐	9	10	9F	10F
Murphy, Alexandra	☐	9	10	9B	10B
Murphy, Connor	☐	9	10	9B	10B

   - 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 9** would normally be expected to promote into **Year Group 10**. It is possible (for whatever reason) that this pupil/student will actually be promoted into **Year Group 11** 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.

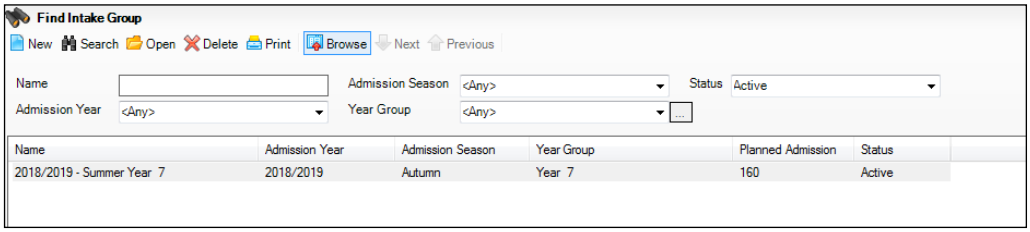
It is also possible to change the application status of individual applicants. For more information, please refer to the appropriate *Admissions* handbook.

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.

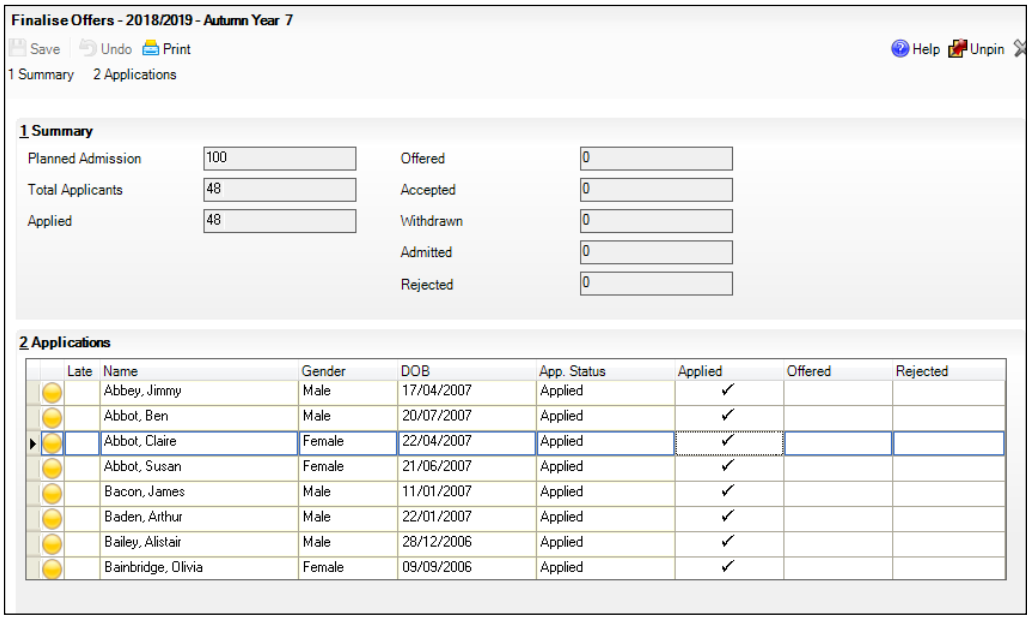
Finalising Offers

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.

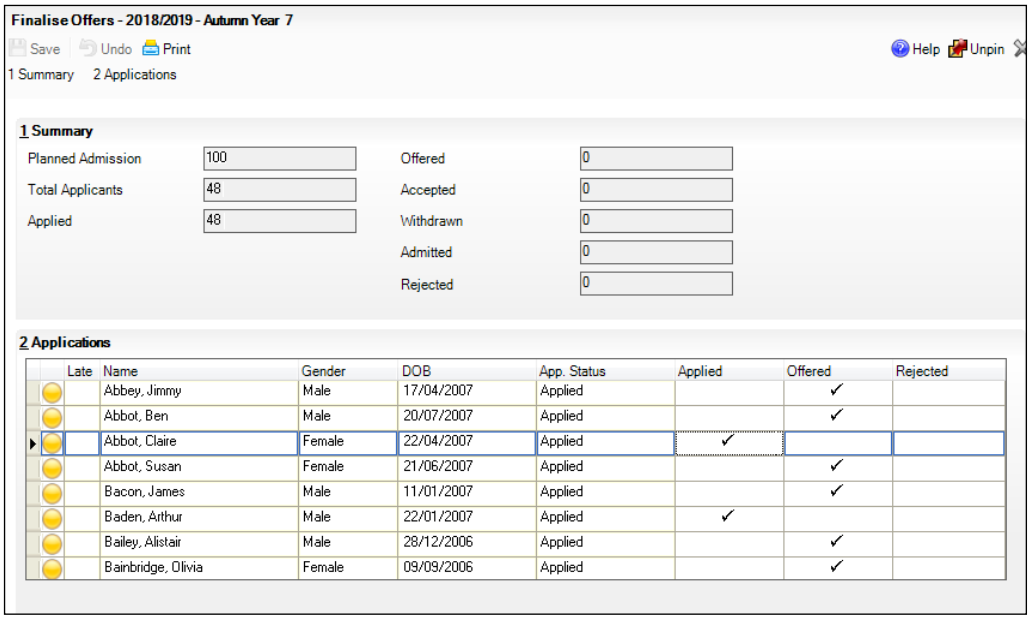


The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied**. Own Admission Authority schools are also provided with the **Late Applications** field.

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.

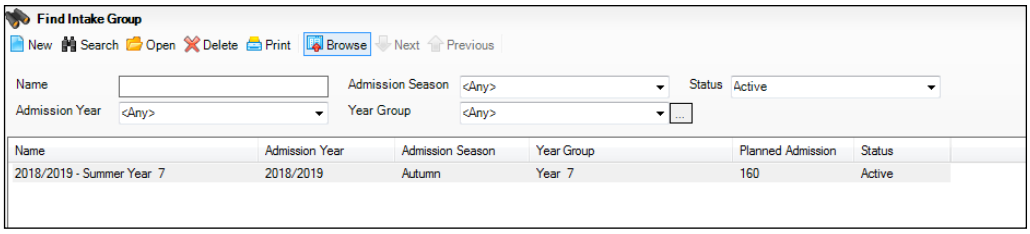


Accepting Applicants

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**.

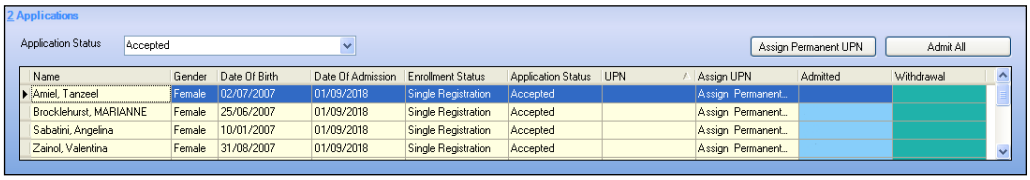
1. Select **Routines | Admission | Accept Applications** to display the **Find Intake Group** browser.



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

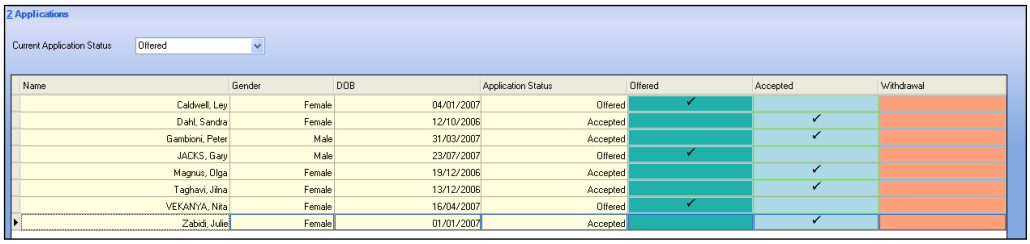
The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied** for, or been **Offered**, a place at your school.

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**

Nova-T6 and Partnership Xchange

Partnership Xchange connects the SIMS systems of schools that share pupil/students in a partnership or consortium, ensuring that pupil/student core data is kept up-to-date and enables the exchange of class memberships, lesson attendance marks and assessment data.

The *Partnership Functions* chapter of the *Nova-T6* manual describes the functionality in Nova-T6 that supports Partnership Xchange. In particular, it describes the steps that partnership management should undertake to ensure that the schools in the partnership operate matching timetables, and moreover enables future communications between these schools, specifically regarding pupil/student class memberships.

Ideally, the shared aspects of the consortium timetable (for example the Option blocks in years 12 and 13) should be designed centrally and then distributed to each of the schools for inclusion in their own systems at an early stage in the timetabling process.

Transferring the Curriculum and Timetable to SQL

The curriculum plan and timetable in Nova-T represents a *snapshot* of how classes are organised and scheduled. Once complete, this data must be transferred to SQL.

> *NOTE: If you use Cover and you use non-teaching registration periods to provide registration cover, ensure that you have set up these registration periods as non-teaching in your cycle. There is no need to make changes to your period type settings.*

Preparing for Export to SQL Using Curriculum Matching

Before you carry out a transfer of curriculum and timetable data to SQL, you should carry out these steps:

1. Make sure that the Document Management Server is active (in SIMS, check **Tools | Setups | Document Management Server**).
2. If you have not done so recently, run **Tools | System Diagnostics | Database Diagnostics** in SIMS.

Manage Classroom Staff

When the timetable is imported, the wizard attempts to match the staff codes mentioned in the import file with the staff codes in Manage Classroom Staff for the relevant academic year. When the 'next' academic year was created, Classroom Staff will have been carried forward into it, i.e. Classroom Staff with a staff code in the current academic year *and* a staff role on or after the last day of the *current* academic year, will have been given a staff code in the *next* academic year.

Classroom Staff added subsequently to the current academic year will also have been carried forward to the next. However before attempting to transfer the new timetable, it is worth checking the classroom staff list for the next academic year.

1. Select **Focus | Person | Manage Classroom Staff** to display the **Find Classroom Staff** browser.
2. Check that the member of staff has not already been allocated a **Staff Code** by selecting the new 2018/2019 academic year from the **Academic Year** drop-down list. Select **Yes** from the **has staff code?** drop-down list.
3. Click the **Search** button then inspect the list of classroom staff returned. If any staff to be imported on the timetable are not present, you will need to add them, as described in the *Academic Management* handbook.

Starting the Export from Nova-T6

Before the export can be completed, the Timetabler needs to assign levels to classes in Nova-T6 via **Tools | Assign Levels** (where Nova-T6 has been used to construct the new timetable).

1. Ensure that you have loaded the relevant SPL file for the new academic year then select **Data | Export Curriculum and Timetable to SQL**.

   As the academic data stored in the SQL database is historical, a date range for the exported data must be provided so that the records transferred have start and end dates. In this case, as you are setting up the timetable for the coming year you should pick a date range corresponding to the whole of the working academic year (typically a date early in September to a date in June or July).
2. If prompted, you should log into the SQL database with a suitable user name and password.

The Curriculum Matching Wizard

A number of validation checks are carried out on your data prior to the first page being displayed. For example:

- the supplied start and end date must lie within a single academic year.
- the supplied start and end date must lie within a single timetable cycle.
- the shape of the supplied timetable cycle must match the one in SQL. One exception to this is that the transfer is still allowed on the first export of non-teaching periods to SQL.

If any of these checks fail, the transfer will be unable to proceed. Click the **Help** button for further information on resolving these issues or refer to *Curriculum Matching* in the *Nova-T6 Links* chapter of the *Maintaining Nova* handbook.

Otherwise if all the checks are passed, you may proceed by clicking the **Next** button.

> *NOTES: The whole curriculum will be unlinked as there is nothing in the database for the new academic year to which the bands, block groups and classes can be linked.*
>
> *All items on the left-hand side of the **Merge Curriculum** page are highlighted in orange because they are unlinked. This is as expected.*
>
> *Similarly on the right, a message is displayed explaining that there is no curriculum data in the database (except bands if these have previously been exported). This is as expected – it refers to the selected academic year.*

On subsequent transfers, the appearance will be different, as it is expected that most (if not all) of the submitted curriculum will be automatically matched with the data in the database.

The final page of the wizard prompts you to confirm that you wish to continue with the transfer process. To do this, click the **Submit** button. The submission may take a couple of minutes to execute and during this time a rotating graphic is displayed. After it has completed, click the **Finish** button to close the wizard.

Unmatched Teachers and Rooms

After the wizard has closed, Nova-T6 analyses the data returned and if any teachers or rooms were not found or recognized in SQL, these are listed. In such cases, classes associated with teachers or rooms that could not be identified are recorded in SQL, except that the teacher or room assignment will be missing (please see *Manage Classroom Staff* on page *57*).

> *NOTE: Teachers will be exported to SQL only if they are employed for the whole of the export date range.*

☐ **Completed**

Where Can I Get More Information?

For full instructions on how to run the Curriculum Matching process, please refer to *Curriculum Matching* in the *Nova-T Links* chapter of the *Maintaining Nova* handbook.

☐ **Completed**

Exporting Derived Year Classes to SQL

> *NOTE: Please ignore this section if your school does not use derived years.*

Year groups in Nova-T6 are associated with National Curriculum Years (NC Years). A derived year (containing pupil/students from one or more years) must be associated with one of the National Curriculum Years concerned (e.g. NC Year 12 and 13). Classes that contain students from both Yr 12 and 13 can then be included in the export to SQL. In Academic Management, Year 12 and 13 pupil/students will be eligible for the classes in the derived year.

☐ **Completed**

Arranging Pupil/Student Memberships

Pupil/Students need to be allocated to bands, curriculum groups and classes. This can be achieved using any of the following four methods:

- Copying memberships from the previous year using Academic Promotion.
- Importing memberships arranged using Options.
- Manual entry, by placing ticks on the tick grids, or using the **Student Curriculum Summary** page.
- Exporting and importing pupil/student memberships using a spreadsheet.

Additional Resources:

Options Online User Guide
Using Options 5 handbook

☐ **Completed**

Performing Academic Promotion

The purpose of the Academic Promotion functionality is to generate curriculum memberships in the *next* academic year for all the groups of a scheme in one go, based on equivalent memberships of classes and other curriculum groups in the *current* academic year. There are two steps to the Academic Promotion routine:

1. Setting up the promotion rules via **Routines | School | Academic Promotion Rules**. Please refer to the *Academic Promotion in SIMS* chapter in the *Academic Management* handbook for more information.
2. Applying the rules using the **Curriculum Promotion** wizard (from the tick grid on the **Group Memberships in Scheme** page, click the **Allocate** button and select **Curriculum Promotion Wizard**. For more information, please refer to the *Academic Promotion in SIMS* chapter in the *Academic Management* handbook).

> ***IMPORTANT NOTE:*** *Before running the Academic Promotion process, you are strongly advised to take a full and verified backup of your SIMS SQL database. This is a powerful process that creates many pupil/student group memberships.*

Once the promotion rules have been set up, you need to apply the rules using the **Curriculum Promotion** wizard from the **Curriculum Scheme** tick grid (please see *Running Academic Promotion* on page *62*).

Important Information Regarding Academic Promotion

Before using the Academic Promotion process, please note the following points:

- Academic Promotion can take place only if the academic year into which promotion is taking place:
  - has been defined in SIMS (for the purposes of Academic Promotion, only the term start and end dates are required. The remaining dates, such as half-term, training days, etc. can be added at a later date.
  - contains curriculum data exported from Nova-T.
  - has been selected as the *current* academic year in Academic Management.

  For example, if you want to promote from academic year 2017/18 to 2018/19, you must select 2018/19 as your current academic year (via **Tools | Academic Structure | Set Academic Year**).
- Once the academic year has been defined, you must run Pastoral Promotion to ensure that the pupil/students are in the correct years and National Curriculum years for the new academic year. You must then transfer the curriculum and timetable from Nova-T6 into the new academic year.
- In the majority of Secondary schools, Academic Promotion will apply to years 10-11 and years 12-13, because these pairs of years represent the delivery of two-year courses (GCSE courses are generally delivered during years 10-11 and AS/A Level courses during years 12-13). However, this does not preclude the use of Academic Promotion across other National Curriculum year combinations, such as years 7-8, where you might want to preserve sets in Maths and Modern Languages.

The Academic Promotion process for a scheme in the next academic year is run from its tick grid. A column named **Promotable** is available in the **Find Curriculum Scheme** browser, from which you should open a **Promotable** scheme.

IMPORTANT NOTE: *Academic promotion must be run for each scheme whose groups you want to promote with memberships from the previous academic year, one scheme at a time. It is not possible to promote all of the requires schemes at the same time. The reason why there is not a single promotion routine for all schemes, is that it would then be difficult to deal with any exceptions that might arise. It is important to promote the schemes in a logical order, starting with the band schemes and progressing down to the block schemes and non-singleton cluster schemes (cluster schemes with more than one destination group, e.g. a cluster scheme that provides a linked class arrangement).*

The **Curriculum Promotion** wizard can create a group membership in the new academic year for a pupil/student only when certain conditions are fulfilled. At each stage, there might be individual pupil/students who do not meet these conditions. The promotion routine will report these and you will need to consider them on an individual basis. Such exceptions might be evidence of errors in the data, such as missing National Curriculum year memberships, or of multiple or missing memberships within the scheme in the previous academic year. You must resolve these and other cases manually.

The promotion process can be repeated as many times as you want for the same scheme, until the promotion is performed to your specific needs. For example, a promotion could be performed based on a **Reference Date** of 10 June and later repeated for the **Reference Date** of 17 July, which is nearer to the end of the Summer term. This would be particularly useful if there is a change to the pupil/student population or a change to the group memberships for the selected scheme, perhaps due to an end-of-year assessment.

*NOTE: The **Reference Date** is the date pupil/student group memberships are read, in order to populate group memberships in the new academic year.*

Advice on Running Academic Promotion

It is strongly recommended that you promote bands before promoting any other groups. Promoting pupil/students to their new groups higher up the hierarchy ensures that they will automatically be eligible for memberships lower down the hierarchy for the appropriate groups.

For example, assigning a pupil/student to band 7x automatically makes them eligible for the groups associated with 7x Maths, 7x English, 7x Science, etc. If bands are not promoted first, all pupil/students in year 7 would be ineligible for membership of all the groups associated with that year.

Promoting bands first would also lead to a reduction in the number of warning messages being displayed when running Academic Promotion.

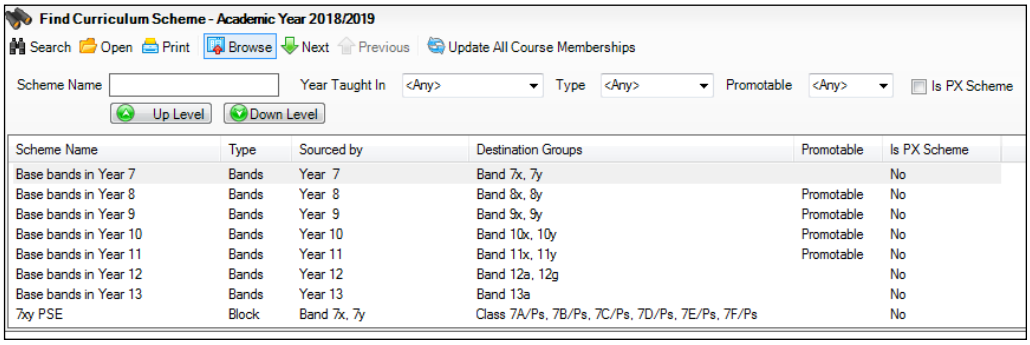
Running Academic Promotion

***IMPORTANT NOTE:** Before running the Academic Promotion process, you are strongly advised to take a full and verified backup of your SIMS SQL database. Changes to pupil/student group memberships are not saved to the database until you take the conscious decision to click the **Save** button on completion of the promotion. However, this is a powerful process that creates many pupil/student group memberships.*

The Academic Promotion process must be run for *each* of the schemes you wish to promote. Once the promotion has been performed on a scheme, it can be saved and you can move onto the next one.

Academic Promotion can be run as many times as required. This would be particularly useful if a group was inadvertently removed from the promotion process and the data was saved. Even if the data is saved, the process can be run again and this will correct the data. The most recent promotion of a scheme will be set as *current* in the database.

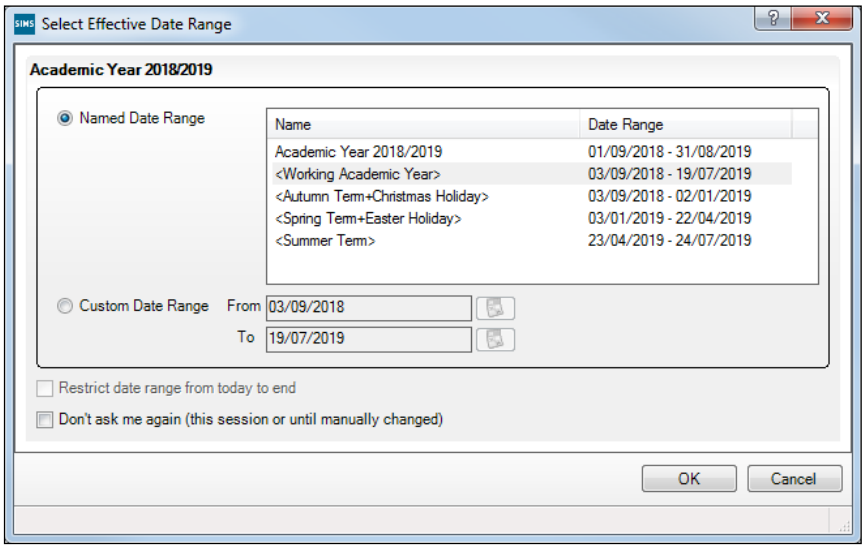
1. Select **Focus | School | Academic Structure | Curriculum Assignment by Scheme** to display the **Find Curriculum Scheme** browser.



2. Enter search parameters and click the **Search** button to display all of the schemes in the curriculum plan or press **Enter** without entering any search parameters.

> *NOTE: Setting the promotion rules via **Routines | School | Academic Promotion Rules** places **Promotable** in the **Promotable** column of the **Find Curriculum Scheme** browser. A scheme displaying **Promotable** has at least one destination group that is the target of a promotion path defined in SQL. Any scheme with a blank **Promotable** column cannot be promoted, as no promotion path that points at any of its groups has been defined. It will not be possible to run the **Academic Promotion** wizard for schemes that display a blank.*

3. Highlight the required scheme and click the **Open** button to display the **Select Effective Date Range** dialog.

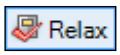


4. Select a date range from the **Named Date Range** list or select a **Custom Date Range** to be used for the Academic Promotion and click the **OK** button to display the tick grid.

   New memberships created by the promotion process will be for the date range selected here. For example, you could select the predefined dates for the following academic year. The selection defaults to the **Working Academic Year** of the currently selected academic year, which will usually be the appropriate option for this purpose.

5. Select the mode in which you wish to work, either **Relaxed Mode** or **Strict Mode**.

   Click the **Relax** button to suspend the eligibility rules so that pupil/students can be allocated to groups for which they are ineligible.

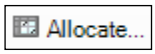
   

   Relax button

   Once you have clicked this button, the background on the button changes to indicate that relaxed mode is selected.

   Alternatively, if you want to ensure that eligibility rules for pupil/student class memberships are enforced (*Strict Mode*), make sure that the button is deselected. Strict mode is the default.

6. Start the Academic Promotion process by clicking the **Allocate** button and selecting **Curriculum Promotion Wizard** from the pop-up menu.

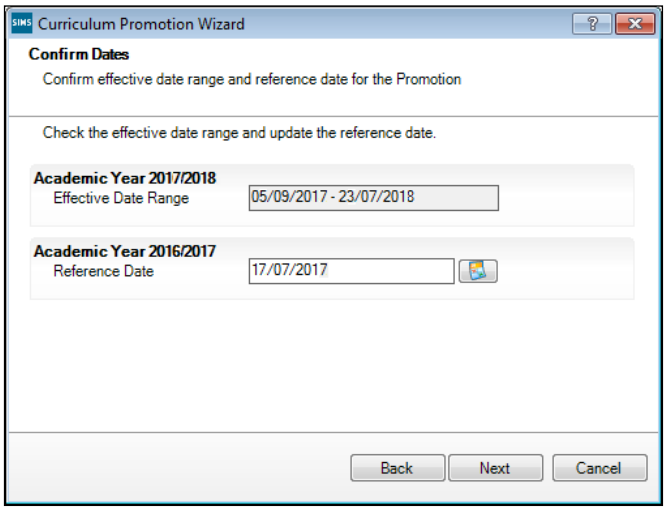
   Allocate button

   Follow the instructions provided in the wizard. On opening the wizard, a warning indicates that any pupil/student tags or selections on the tick grid are removed if you proceed. This is because tagging is used to indicate any pupil/students for whom a membership was not created by the promotion process.

   If you need to make a note of the tagged and/or selected pupil/students before they are cleared, click the **Cancel** button to return to the tick grid. Start the **Curriculum Promotion** wizard again when you are ready.

   Any filters that have been set to restrict the pupil/students listed in the tick grid will apply when promoting the selected scheme. Pupil/Students who are filtered out are excluded from the promotion process. The names of these pupil/students are displayed later in the process.

7. Click the **Next** button to display the **Confirm Dates** page.



The **Effective Date Range** used in the tick grid for the next academic year is displayed together with an editable **Reference Date** (the date on which pupil/student memberships are read in order to populate group memberships in the new academic year).

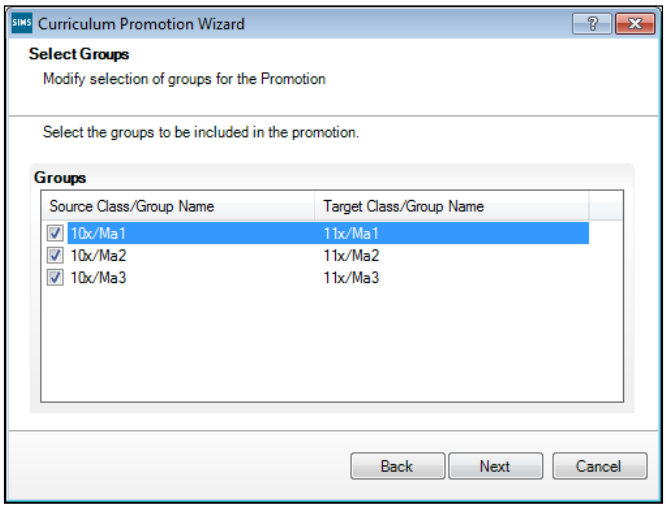
If the **Effective Date Range** displayed is incorrect, click the **Cancel** button to close the wizard and edit the **Effective Date Range** in the tick grid.

8. Select the **Reference Date** for the Academic Promotion by clicking the **Calendar** button and selecting a date from the calendar.

Calendar button

The **Reference Date** defaults to the day prior to the start date of the new academic year, but it is probable that there will be no pupil/student memberships then. The date used must lie within the academic year prior to the new academic year and often would be chosen near, or possibly at the end of, the Summer term. However, if your school completes its 'normal' curriculum early in the year (e.g. the end of June) and for the rest of the year pupil/students are placed into different groups for a special project and you ran the promotion process and accepted the default Reference Date, there would be a danger that the promotion would not find the pupil/student memberships to promote. Instead, editing the **Reference Date** to the day before these short-term groups came into effect would ensure that the original curriculum is promoted.

9. Click the **Next** button to display the **Select Groups** page.



The groups affected by the Academic Promotion are displayed for review. These will be the groups associated with the selected scheme in the tick grid on the **Group Memberships in Scheme** page.

10. Define the groups you wish to include as part of the Academic Promotion by selecting or deselecting their associated check boxes.

> *NOTE: It is not be possible to continue until at least one group has been selected.*

It might be necessary to remove groups from the promotion process if, for example, you wish to reduce the number of Maths classes in the following year. This could be due to a shortage of teachers in the new academic year, resulting in a reduction in the number of classes that can be taken. This would mean that the pupil/students in the third Maths class would need to be evenly distributed to the two remaining classes (**10x/Ma1** and **10x/Ma2** in the previous graphic) to ensure they still get taught Maths this year. After the wizard has assigned pupil/students to **10x/Ma1** and **10x/Ma2**, you can assign those who were in **10x/Ma3** to either of the other two remaining groups manually, using the tick grid.

When the groups have been selected, the system can identify the pupil/students whose group memberships *next year* will be affected by the promotion process. These pupil/students appear as editable in the tick grid (i.e. they are listed with a white background) and were members of corresponding groups in the previous year, on the selected **Reference Date**.

11. Click the **Next** button to continue.

A warning is displayed if a pupil/student is known in the new academic year, but was unknown in the previous academic year. This might occur if, for example, a pupil/student joins your school at the start of the new academic year.

12. Click the **Yes** button to continue. The selected pupil/students will be included as part of the promotion process.

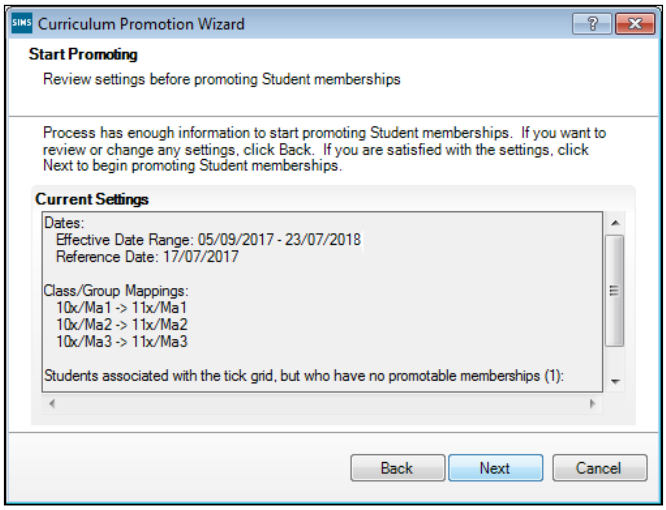
The number of pupil/students who were members of groups in the previous academic year, but do not appear in the tick grid for next year, is displayed.

> *NOTE: Pupil/Students who were members of a group in the previous academic year, but who are not eligible for the next year group or have been filtered out of the tick grid, cannot be promoted. A pupil/student who is displayed in the tick grid with a read-only row (yellow background) can be promoted only if you have clicked the **Relax** button. The number of pupil/students who could potentially be promoted, but have no membership of the appropriate group in the previous academic year, will also be displayed. This is very unlikely to happen, unless you have selected an inappropriate **Reference Date**, and no pupil/students have a membership on the selected date.*

13. Click the **OK** button to continue. The number of pupil/students who could have been promoted, but were filtered out of the tick grid, is displayed.
14. Click the **OK** button to continue.

    The number of pupil/students who, at the **Reference Date** in the previous academic year, were members of more than one group belonging to the scheme, is displayed. This is possible, although highly unusual. Such pupil/student memberships will not be promoted. If you want to assign such pupil/students to a group, you must do this manually.
15. Click the **OK** button to continue.

    The number of pupil/students whose row in the tick grid was read-only on entering the **Curriculum Promotion** wizard is displayed. Their class memberships will not be promoted to the new academic year. To enable these class memberships to be promoted to the new academic year, you should close the wizard and relax the eligibility rules by clicking the **Relax** button. You can then run the wizard again and the pupil/students will not be displayed in this list.
16. Click the **OK** button to display the **Current Settings** page.



This page displays a summary of the information that will be used when promoting academic data to the next academic year and is based on the options previously selected in the wizard. This information includes:

- the **Effective Date Range** (over which the new memberships will be created)
- the **Reference Date** (on which previous memberships will be read)
- the mapping of groups from the previous year to the groups of the *next year* scheme that you have selected for promotion and the names of pupil/students who could not be promoted for various reasons (detailed previously).

17. Click the **Next** button to continue.

    Promoted memberships are displayed on the tick grid, but are not yet saved to the database. The changes can still be rejected by clicking the **Undo** button once the wizard has been closed.

    Once the Academic Promotion process has been completed successfully, the final page of the wizard is displayed and informs you that the process has been completed.

18. Click the **Finish** button to close the wizard and return to the tick grid.

    Those pupil/student group memberships that could not be promoted (i.e. because of their status on the tick grid, or not having a membership on the **Reference Date**, etc.) are tagged automatically.

    To display all tagged pupil/students at the top of the tick grid, right-click anywhere on the tick grid and select **Sort by | Tagged** from the pop-up menu. This enables the subsequent manual assignment of pupil/students to their new classes.

19. Click the **Save** button to save the changes of the Academic Promotion process.

    Only after clicking the **Save** button, are the changes made by Academic Promotion saved to the database.

☐ **Completed**

Exporting and Importing Pupil/Student Group Memberships

The export and import of pupil/student memberships function can be used extensively at year end to allocate pupil/students to classes. For full instructions, please refer to the *Importing and Exporting Student Group Memberships* chapter in the *Academic Management* handbook.

> *NOTE: When you have finished assigning pupil/students to their classes, select **Tools | Academic Management | Course Manager | Update Course Memberships**). This routine should always be run when any changes to class memberships are made.*

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. For more information, please refer to the appropriate *SIMS Admissions Code of Practice* handbook.

Application icon

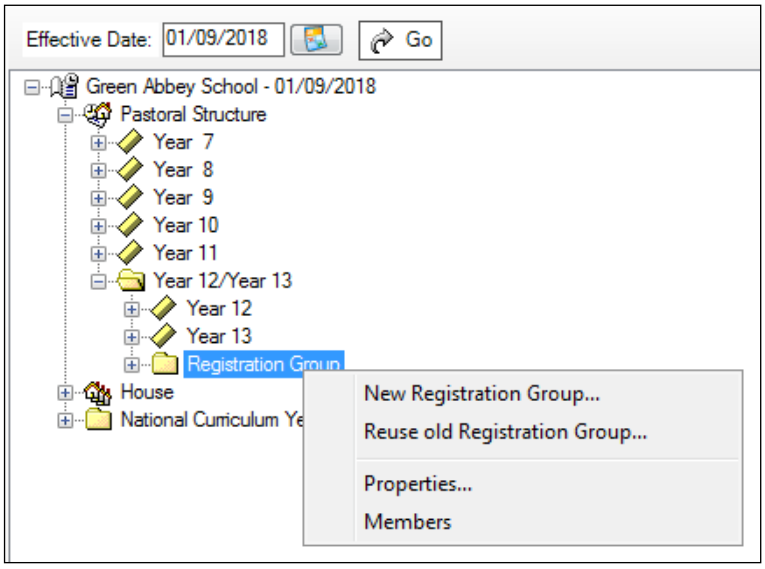
- applied that appropriate application status for each applicant (please see *Changing the Status of Applications to Offered or Accepted* on page *53*).

*NOTE: Applicants who are to be allocated to curriculum classes must have an application status of **Accepted** before they can be assigned their timetable/to their curriculum classes. Schools that have applicants assigned to an admission group should ensure that the appropriate **Enrolment Status** is selected from the drop-down list on the applicant record. This ensures that they are admitted without an admission number and are therefore not on-roll.*

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

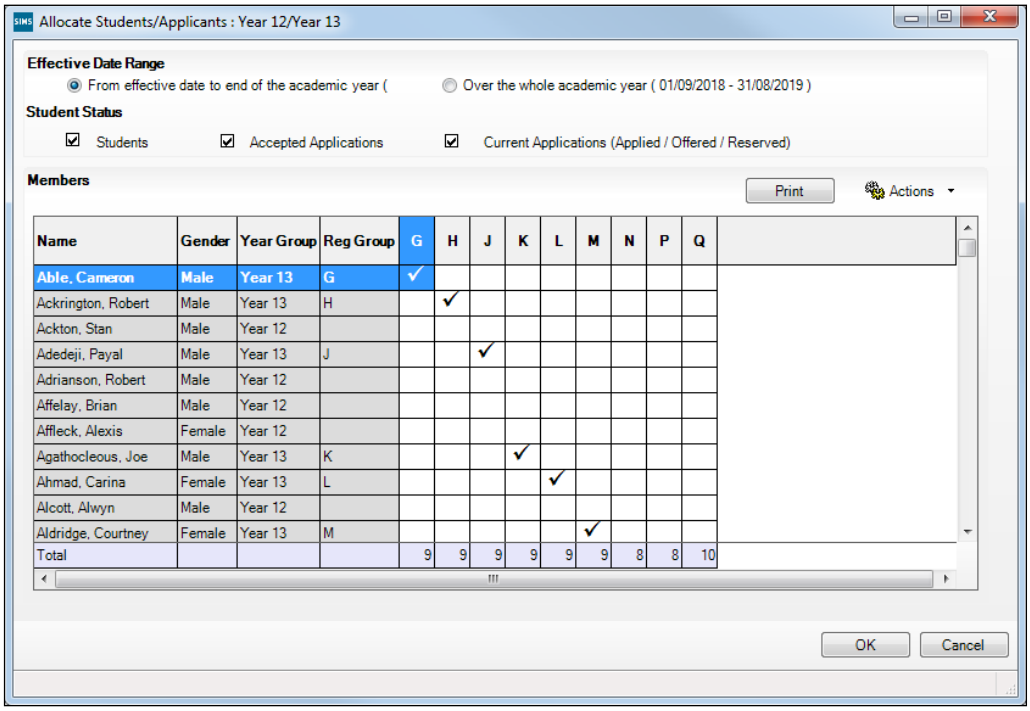
   The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information.

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.

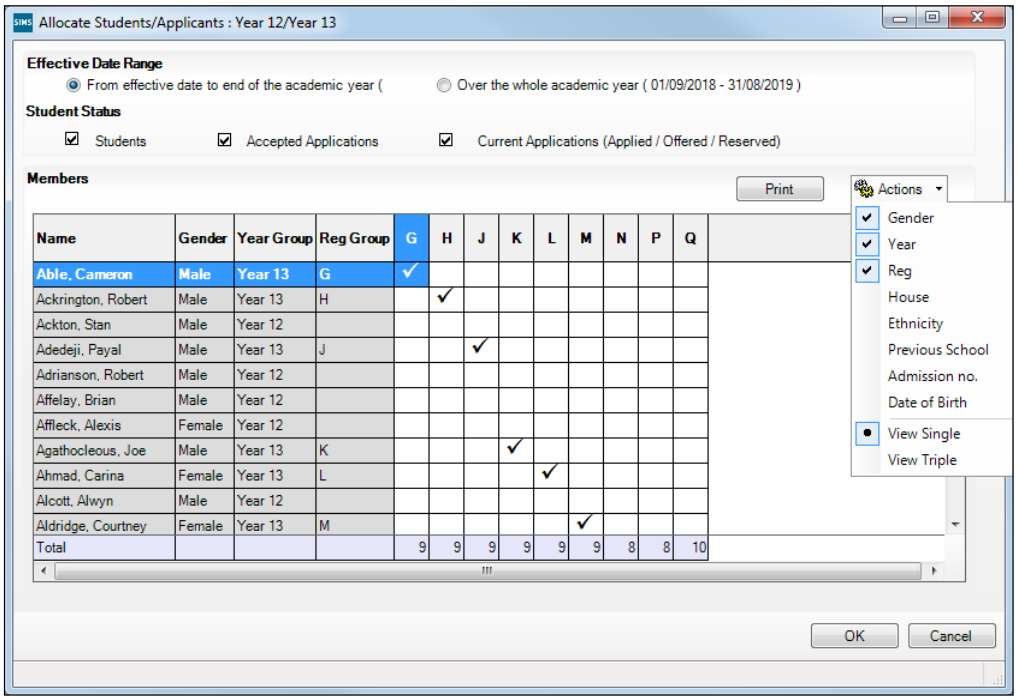


The **Student Status** section enables you to limit the applicants displayed in the grid, as follows:

- **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

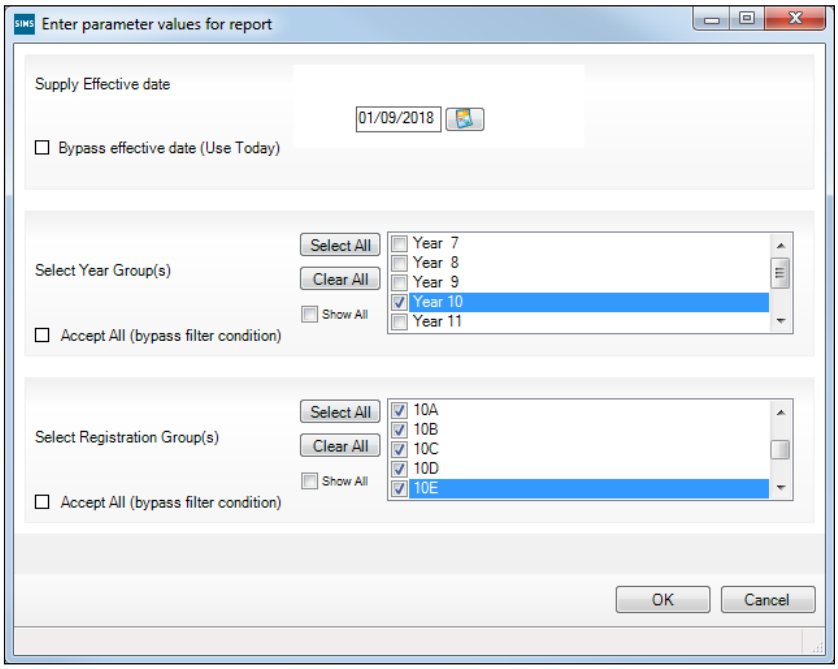
Class (Registration Group) lists can be easily produced using any of the following pre-defined reports:

- 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: 10A
Tutor: **Mr J Brown**
Room: **Humanities Room 2**
Effective date: 01/09/2018

Name	Gender	Date of Birth
Anton Tiger	F	09-02-2004
Barbousci Harold	M	24-05-2004
Barnett Jamie	M	14-02-2004
Bond Jamie	M	01-01-2004
Dean Margaret	F	05-06-2004
Dolby Peter	M	28-04-2004
Drogba Mandy	F	13-03-2004
Hawkins Chris	M	05-05-2004
Jenkins Melanie	F	01-05-2004
Jetty Peter	M	02-01-2004
Koster Sophia	F	18-02-2004
Langford Daniel	M	21-05-2004
Leigh Leane	F	04-03-2004
Little Patrick	M	01-01-2004
Marius Pope	M	17-04-2004
Mugarisanwa Sylivia	F	26-11-2003
Prichard Myle	F	05-06-2004
Shanique Whitter	F	04-05-2004
Smith Trinity	F	11-12-2003
Smith Tristan	M	26-05-2004
Thomas Marcus	M	27-12-2003
Thompson Olivia	F	25-07-2004
Thompson Paul	M	07-09-2003
Ullah Safa	F	30-01-2004
Wright Jane	F	13-01-2004
Yardwood Taylor	F	25-12-2003

Total: Males 12
Total: Females 14
Group Total: **26**

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)

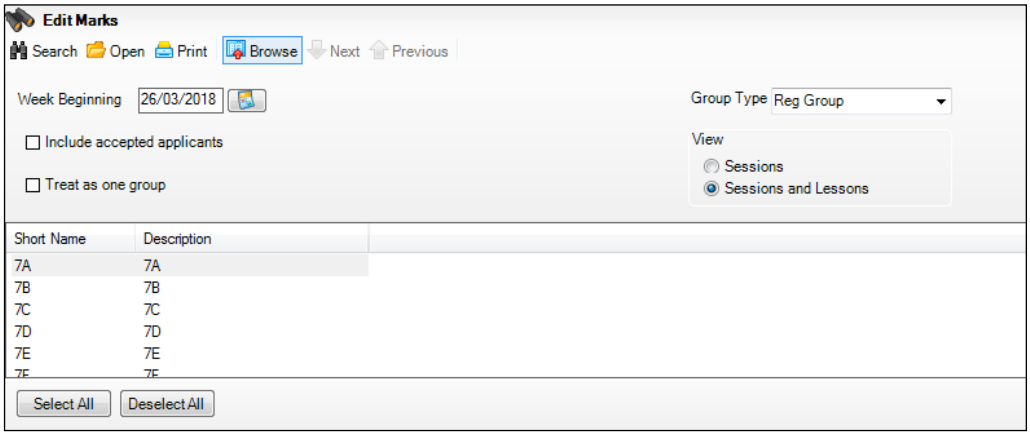
As per the Registration Group (Dated) report but with five additional blank columns.

☐ **Completed**

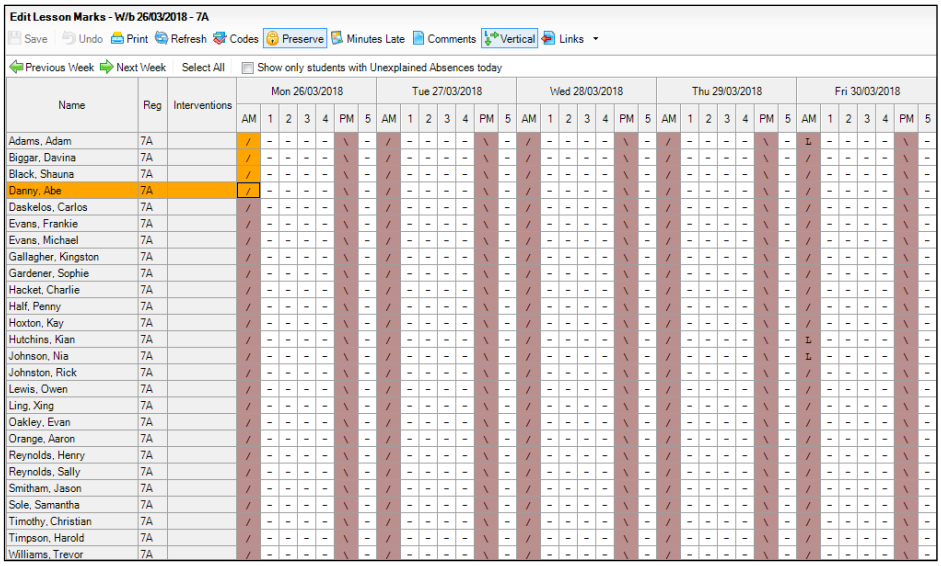
In SIMS Attendance - Entering Reasons for Absence Last Year

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**

Applying the Timetable to the New Academic Year

> ***IMPORTANT NOTE:*** *Lesson Monitor and Cover will not work for the new academic year until this process has been completed successfully.*

The purpose of this routine is to take each day in the specified date range and map it to a day in the timetable cycle. For example, 7 October might be mapped to timetable day 3, 8 October mapped to timetable day 4, and so on.

It is recommended that you apply the timetable only as far in advance as you can be sure of the calendar, e.g. one term at a time.

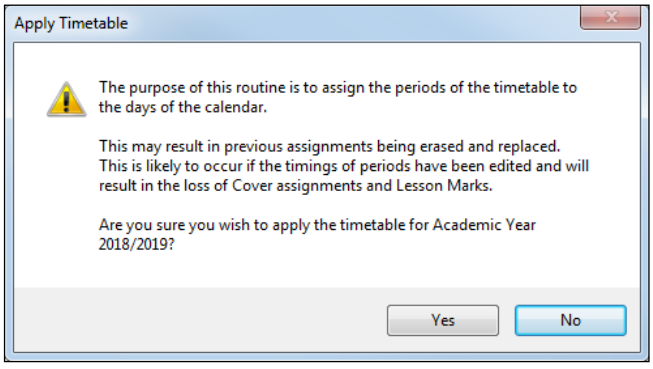
Previous mappings can be overwritten. This may be necessary if mappings had previously been applied to the whole year, or if changes are required.

> ***IMPORTANT NOTES:***
>
> *Cover 7 will only be able to record cover arrangements as far in to the future as the timetable has been applied.*
>
> *Remapping a day will result in the loss of any Cover arrangements made for that day together with any lesson marks.*

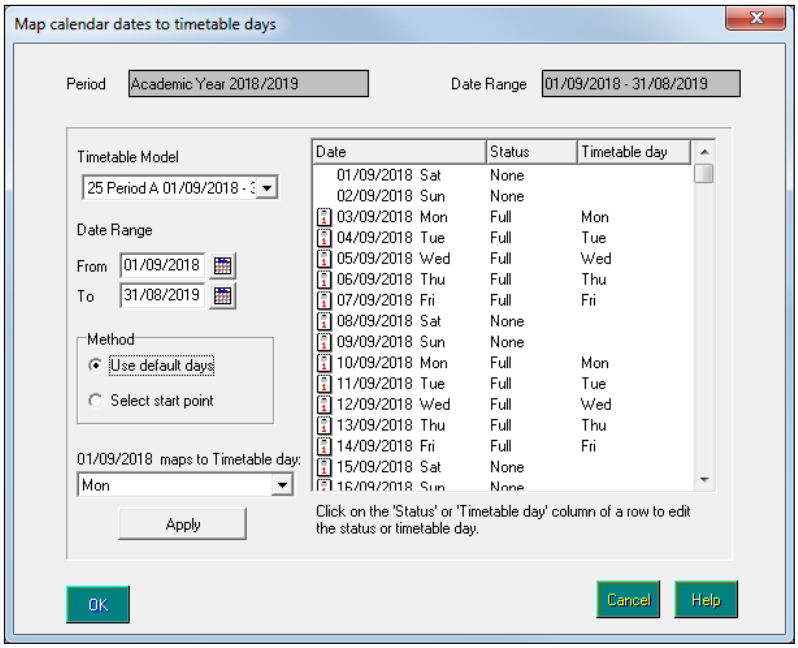
It is important to note the following:

- If you have printed out OMR Registration sheets in lesson groups and have now changed the mappings, these sheets may no longer be useful, as the pupil/students listed may no longer meet on that date.
- If you are using Lesson Monitor and have already used **Tools | Select Periods for Sessions** in preparation for printing registration sheets, then you must select the periods for sessions again after applying the new timetable.

1. Select **Tools | Academic Management | Apply Timetable**. A message dialog prompts for confirmation that you wish to proceed.



2. Click the **Yes** button to display the **Map calendar dates to timetable days** dialog.



3. If more than one **Timetable Model** exists, select the required one from the drop-down list.
4. Specify the date range to which you wish to apply the timetable (e.g. dates of the next term) by entering dates in the **From** and **To** fields. Alternatively, click the **Calendar** buttons and select the dates from the calendars.

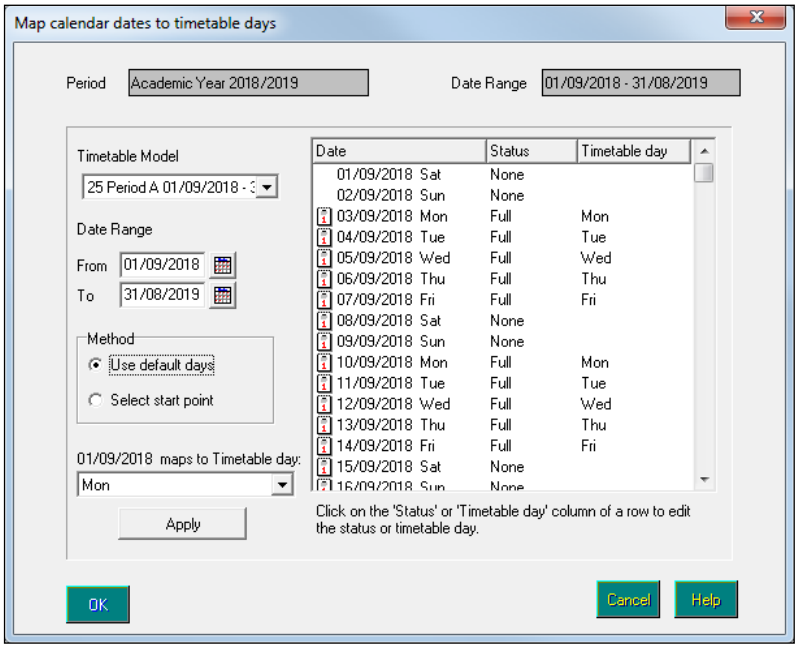
> *NOTE: The date range must be within the dates of the timetable model.*

5. Two methods are available for mapping calendar dates to timetable days. Select either the **Use default days** or **Select start point** radio button.
   - **Use default days** - This method always maps a calendar Monday to timetable Monday, a calendar Tuesday to timetable Tuesday, etc.

     > *NOTE: If a ten day timetable cycle is in use, after selecting the **Use default days** radio button you must select a starting timetable day. For example, whether to map 04/09/2018 to Tuesday1 or Tuesday2.*

   - **Select start point** - If you select this method, dates when the school is open are mapped to timetable days regardless of the day of the week. For example, if Friday 1 December is timetable day 5 and Monday 4 December is a staff training day, then Tuesday 5 December is mapped to timetable day 6. It is possible, however, to avoid this situation by applying the timetable to each term separately (using **From** and **To** dates).

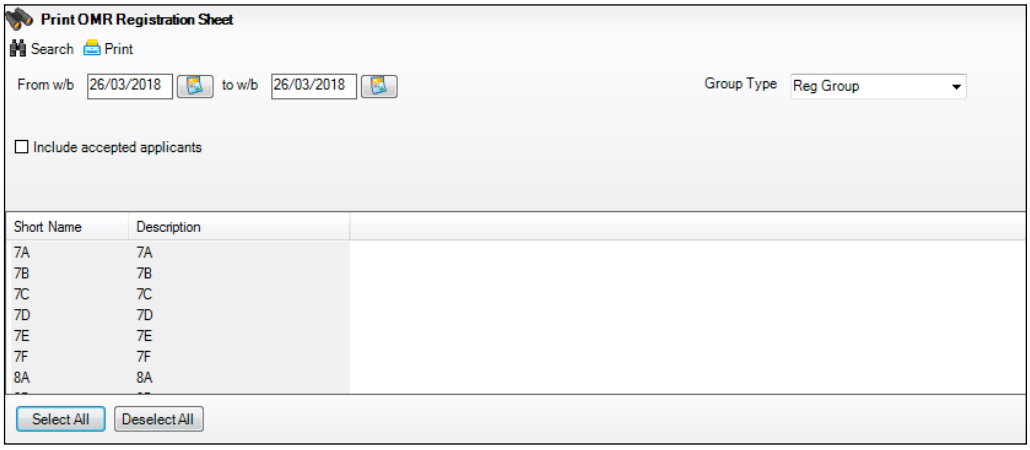
Within the specified date range, the system identifies the first date that does not have a status of **None** and is displayed in the bottom left-hand corner of the dialog. In the following graphic, the date selected from the drop-down list is shown as **04/09/2018 maps to Timetable day**.



6. Select the timetable day that you wish this date to start on from the **dd/mm/yyyy maps to Timetable days** drop-down list.
7. Click the **Apply** button to validate your selections and apply the mapping. The resulting mapping is displayed in the **Timetable day** column.
8. Click on the **Save** button to save the data and apply the timetable.

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**

Other SIMS Module Processes

Assessment Housekeeping

It is recommended that the following tasks are carried out during the Summer holidays or in the first week of each new term.

- Delete unused aspects
- Delete marksheets for old registration groups
- Set up new marksheets for new groups for the new academic year.

SIMS Partnership Xchange

This section applies only to Partnership Xchange users

Partnership Xchange users need to set up their partnership links for the next academic year. This is achieved by adding a new Partnership Instance for the new academic year linked to the same zone as their current active Partnership Instance. A school can only have one active Partnership Instance per academic year.

For instructions on creating the Partnership Instance, please refer to the *Joining/Managing a Partnership* chapter in the *Partnership Xchange for School Administrators* handbook.

02| Routines to be Carried Out After the Academic Year has Started

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Introduction

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

- In SIMS, admit applicants (please see *Admitting Applicants* on page *79*).
- In SIMS, record any re-admission pupil/students (please see *Re-Admitting Pupil/Students* on page *83*).
- In Attendance, print the official register for July (please see *In SIMS Attendance - Printing the Official Register for July* on page *84*).

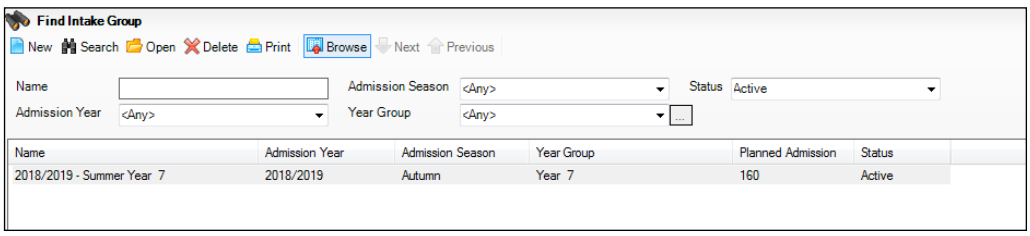
Admitting Applicants

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 **Student** browser by selecting **Guest** from the **Status** drop-down list.*

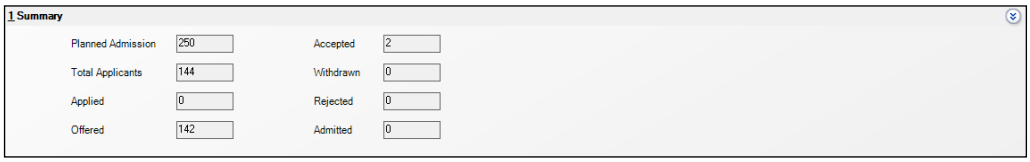
For more detailed instructions, please refer to the appropriate *Admissions* handbook.

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



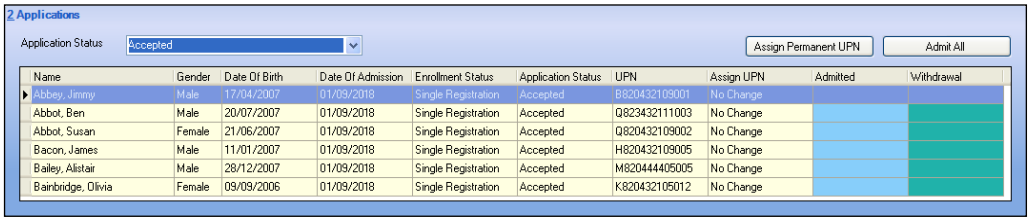
2. Search for and then double-click the required intake group to display the **Admit Applicant Detail** page.

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



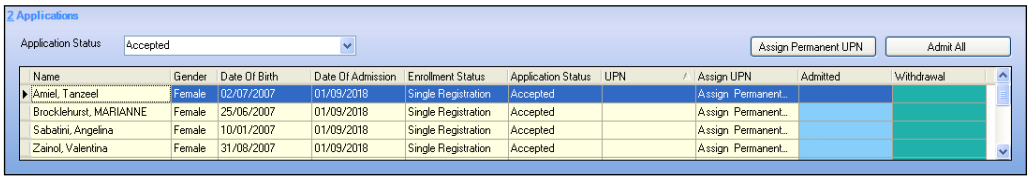
Total Applicants	The number of applicants who have applied for a place in this intake group.
Planned Admission	The original number of new applicants intended for this intake group.
Applied	The number of applicants who have applied for places in this intake group.
Offered	The number of applicants offered 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.

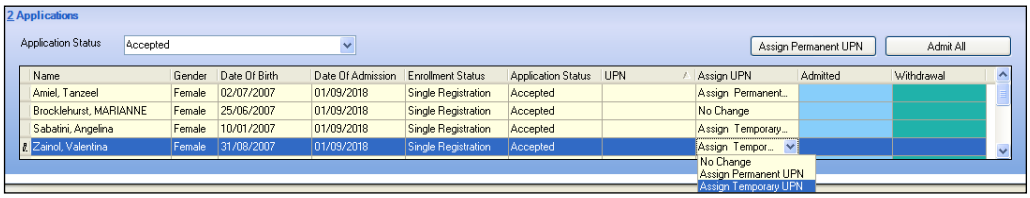


3. If you wish to admit applicants with a different application status (such as **Offered**) select it from the **Application Status** drop-down list then follow the remainder of this process.

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.

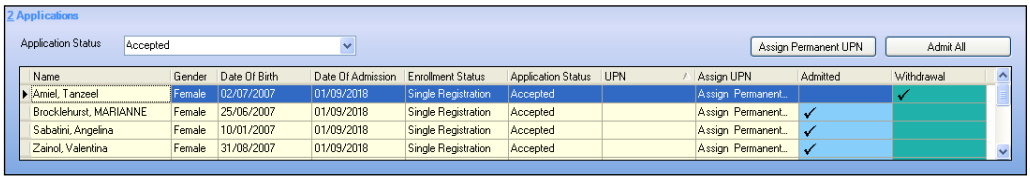


- Permanent UPNs are issued to new applicants only when it is believed that they have never previously been allocated a UPN, or to replace a temporary UPN.
- Temporary UPNs are issued to an applicant only when a school does not know their permanent UPN (e.g. the school is awaiting a transfer file or 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* ***Student Details*** *page. Any known existing UPNs can be entered in the* ***Basic Details*** *panel by clicking the* ***Application*** *icon on the toolbar or 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.



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**

Setting up a Pattern of Registration and Periods

This section applies only to Lesson Monitor users

If you use Lesson Monitor, you will need to set up a new pattern of registration against periods at the beginning of the academic year, so that the new pattern is aligned with the current timetable. It is possible to associate a pattern with a timetable in the future, not just the current timetable, if required.

The current timetable structure, plus current AM and PM registrations, are displayed in the form of a grid. In some schools, PM registration takes place after the last period of the school day.

Any changes to the timetable will require the setup routine to be edited, e.g. if an extra period is included in the timetable or if a period is taken out. The start of a new academic year is an example of when this may occur.

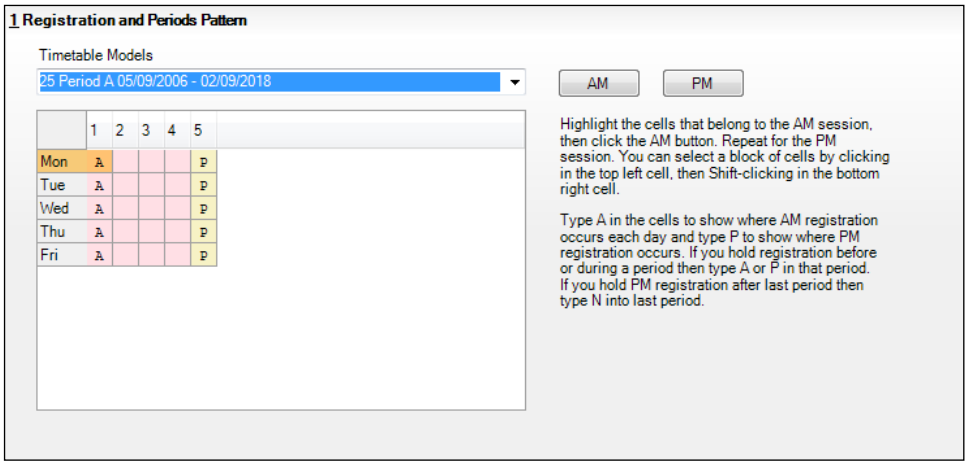
When pupil/students have less than a full timetable, it is possible that they will not attend lessons that have been designated for registration. If this is the case, lesson marks for a pupil/student's earliest timetabled period can be counted as registration marks.

1. Select **Tools | Setups | Lesson Monitor Options | Lesson Monitor Setup** to display the **Lesson Monitor Setup** page.
2. In the **Registration and Periods Pattern** panel, select the required option from the **Timetable Models** drop-down list. The current (and any future) timetable models that have been applied to SIMS are available for selection. The selected timetable model (either one week or two weeks) is displayed in the grid.
3. Highlight the cells that belong to the AM session then click the **AM** button. A block of cells can be selected by clicking the cell located at the top left-hand side then, while holding down the **Shift** key, click the cell located at the bottom right-hand side. The selected AM cells are coloured pink.
4. Highlight the cells that belong to the PM session then click the **PM** button. The selected PM cells are coloured yellow.
5. To indicate the period when registration takes place each day, enter **A** (AM registration) and **P** (PM registration) in the appropriate cells.

   If registration takes place before a period, enter **A** or **P** in that period.

   If PM registration takes place after the last period, enter **N** in the last period.

6. Click the **Save** button. The registration and period pattern is saved for the date range of the selected timetable model.



☐ **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.

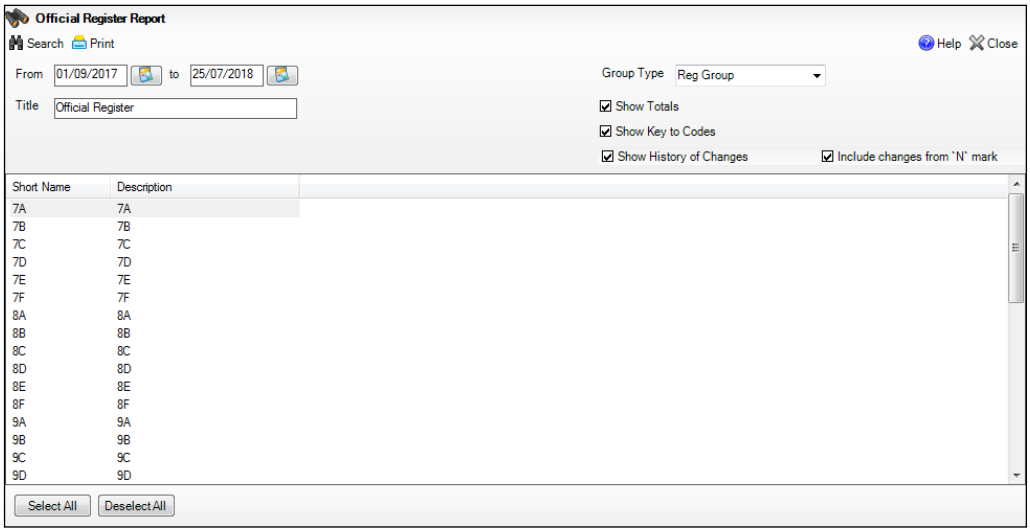
4. Highlight the required pupil/student and click the **Open** button to display a warning message **The selected pupil/student is a Leaver, do you want to re-admit the Pupil/student?.**
5. If you are certain that this is the pupil/student who should be re-admitted, click the **Yes** button to display 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 Student 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**

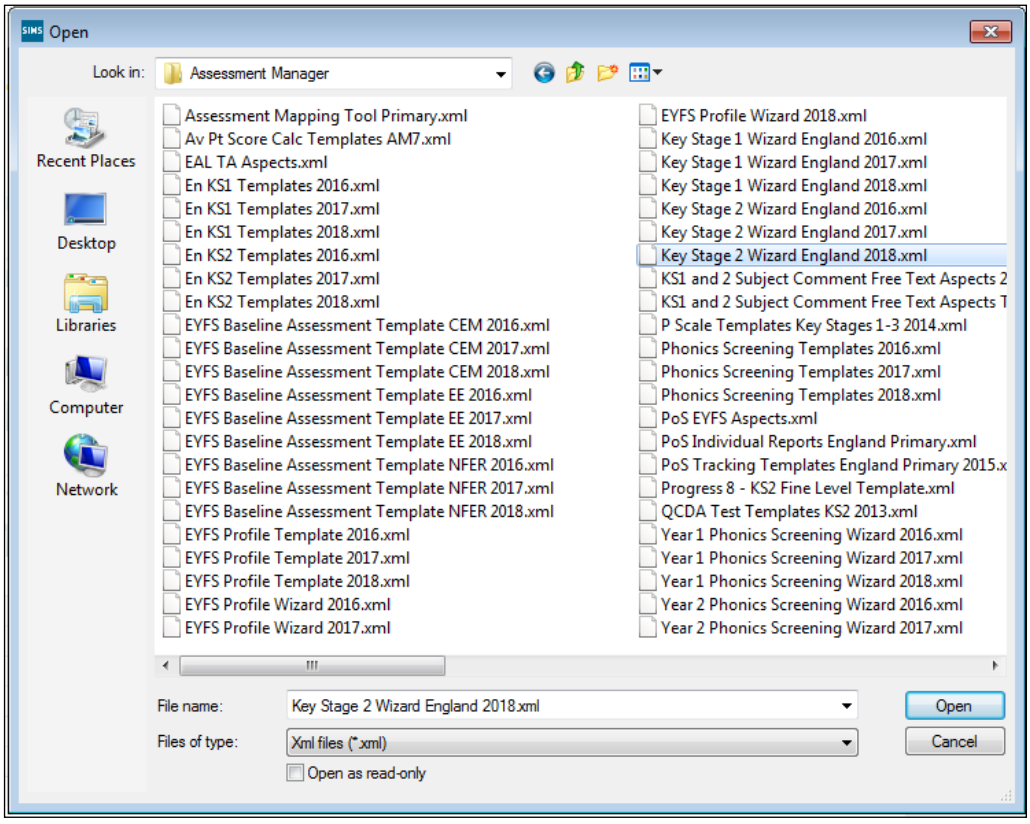
Running Housekeeping Routines in SIMS

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 2 Wizard England 2018.XML`, then click the **Open** button.
4. 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.
5. Select the **Overwrite with default values** check box if you want to update the column headings.

6. 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. For Lesson Monitor users, further information can be found in the *Archiving Attendance Marks* in the *Housekeeping Routines* chapter of the *Monitoring Session and Lesson 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.

SBS
School Business Services

Contact the Service Desk today on

0345 222 1551 • Option 3

or email us on

misservicedesk@
schoolbusinessservices.co.uk