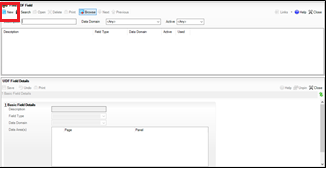
**Maintaining and setting up a User Defined Fields (UDF) in SIMS**

**Why use User Defined Fields in SIMS**

Non-standard information can be recorded and maintained in SIMS, for example an indicator to show children of keyworkers Data is easy to maintain and update~~d~~. Fields can be selected to show within the group registration screens

* Fields and data can be easily removed when no longer
* The~~y~~ fields are full reportable

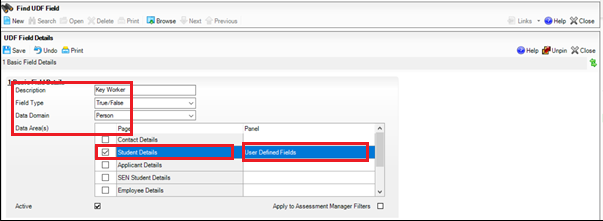
1. **How to Set up a Key Worker User Defined field in SIMS**

**Click on Tools | Setups | User Defined Fields. Select ‘New’ to add a new value**

**Enter a description, Field Type, and Data Domain.**

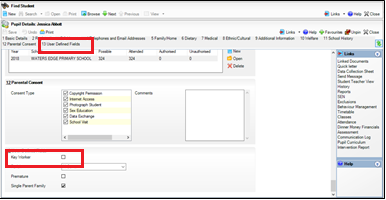
1. In the Description field type in ‘**Key Worker’** and for the field type select ‘**True/False’**. This field type is easy to update through **SIMS | Routines | Student | Bulk Update**.

**Note:** Other field types are available but they will not display in the Bulk Update functionality.

1. The Data Domain and Data Area fields determine where the new UDF will be visible within SIMS. Select ‘**Person**’ for the Data Domain and ‘**Student Details**’ for the Data Area(s).
2. ****Click in empty cell next in the Panel column next to Student Details and select ‘**User Defined Fields’**. This will add the Key Worker True/False field to Section 13: User Defined Fields to the Student Record (you can select other locations depending on where you want the Key Worker field to appear).

Before saving, ensure that the ‘Active’ check box is selected. Click Save.

**Note:** For the field to appear in the SIMS Reporting Dictionary please close and re-start SIMS.

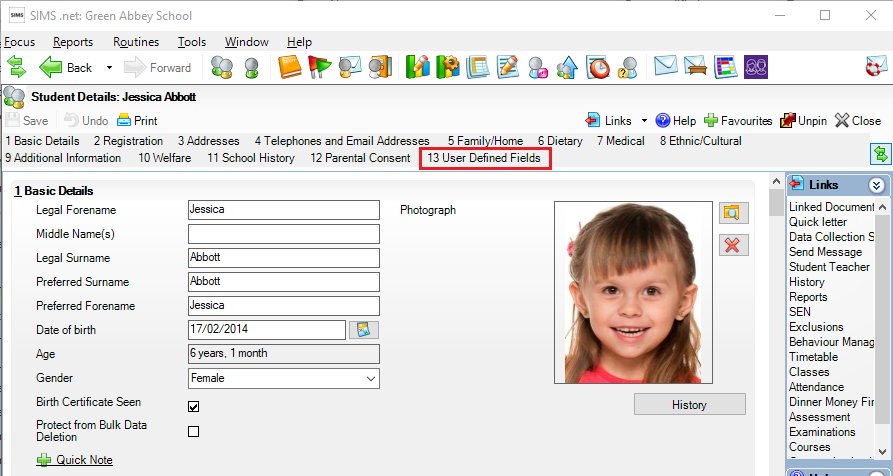
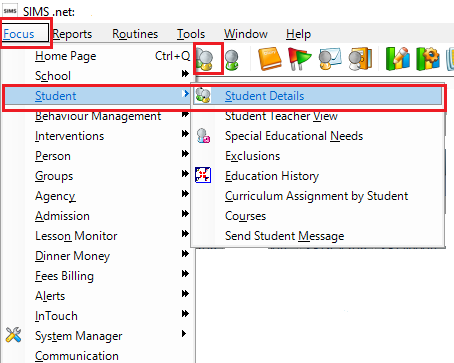


1. Once the UDF has been created, it will be visible within Section 13 . User Defined Field of the pupil/student record.
2. **Maintaining Data within User Defined Fields**

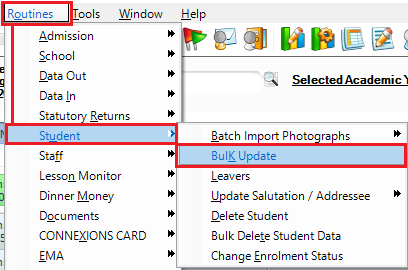
There are two ways to enterand maintain User Defined Field data within SIMS:

1. **Pupil/Student Record for Individual Data Entry**

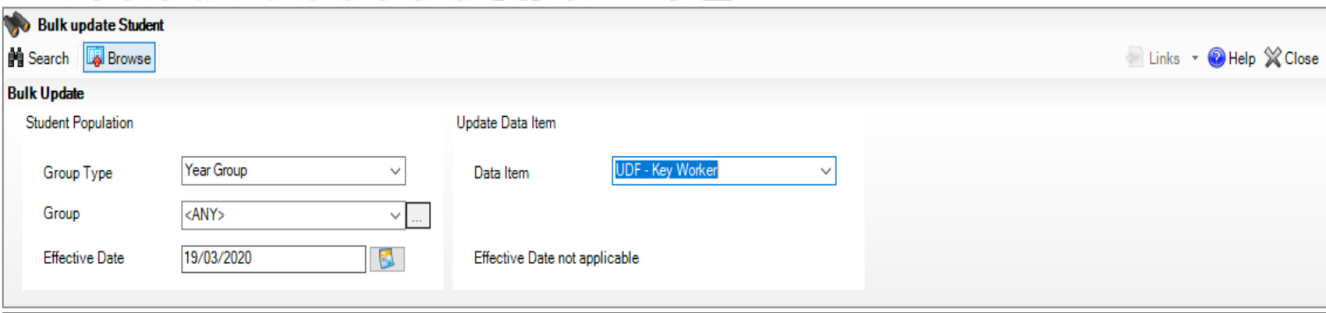
Click on **Focus | Pupil/Student | Pupil/Student** Record (or the Pupil/Student Details icon) and select a pupil/student to open their record. Click on **Section 13. User Defined Field** link at the top of the screen or scroll down toSection 13. Update data as required.



1. **Bulk Update routine**

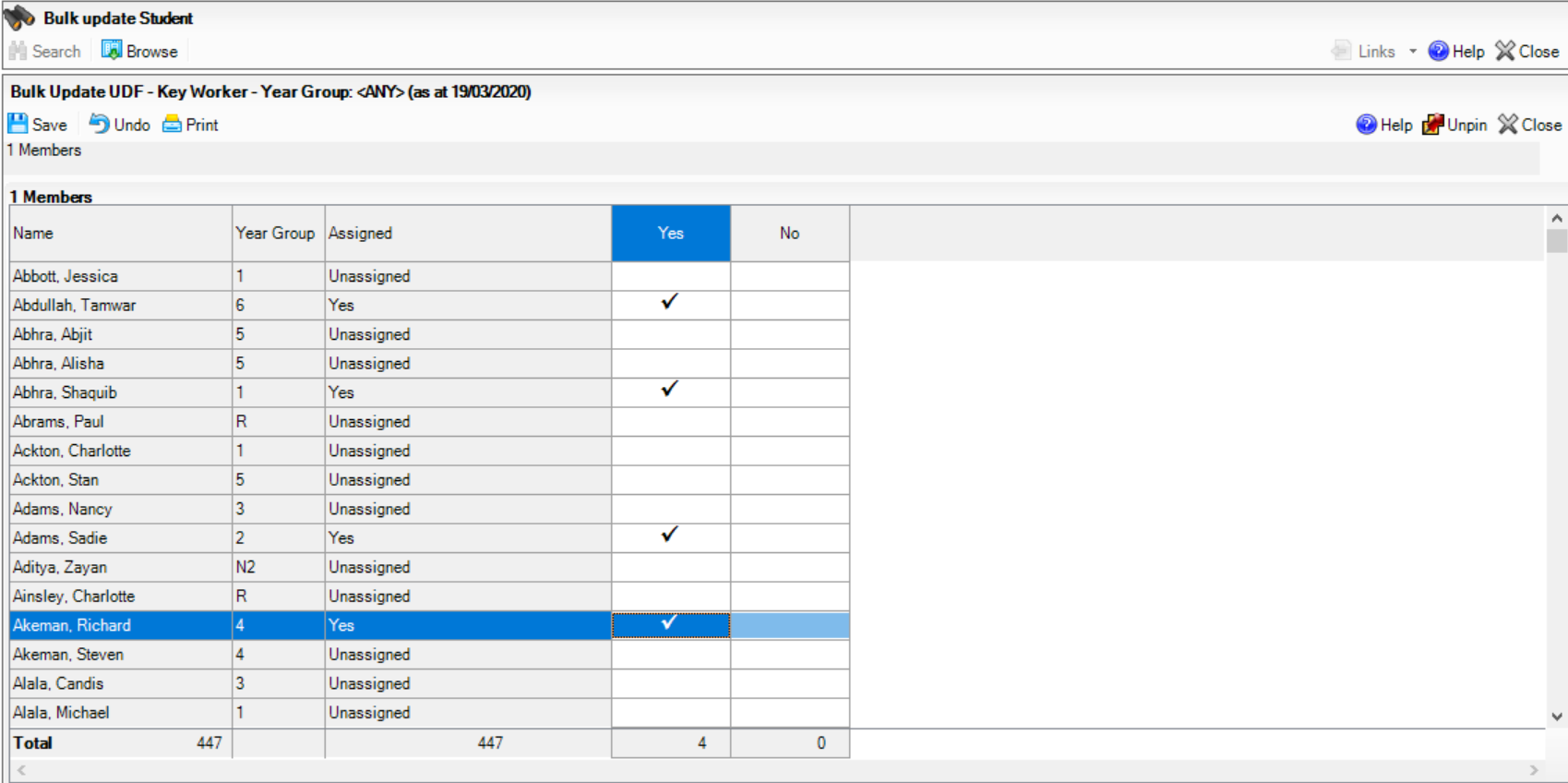
****Click on **Routines | Student | Bulk Update** to open.

In the Student Population panel select ‘**Year Group’** for the Group Type (as shown in the example below). Then for the Group select ‘Any’ (this pulls through the whole school list of pupils when searching) In the Update Data Item panel select an effective date eg. today’s date. Within the Data Item drop down field select the newly created UDF - Key Worker.



Click on ‘**Search’** to list the whole school list of pupils/students.

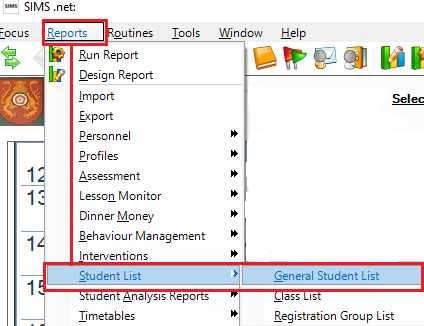
can now assign pupils to the newly created UDF by clicking in the cell to place a tick. As you insert ticks, the ‘Total’ row at the bottom of the grid will indicate how many records have been added. Click on **Save.**



**Top Tip:** Click on the ‘Print’ button to print details.

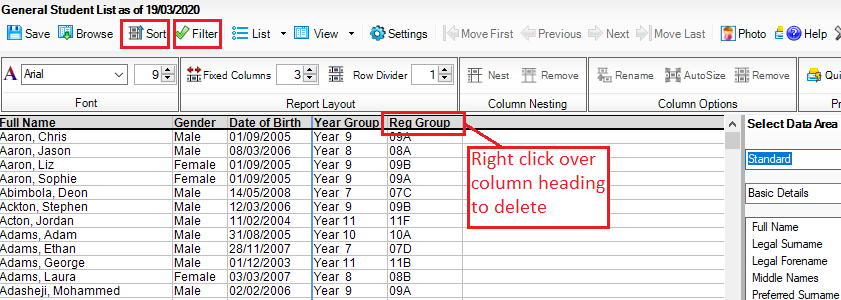
1. **Reporting on User Defined Fields**

You have two ways to report on User Defined Fields in SIMS:

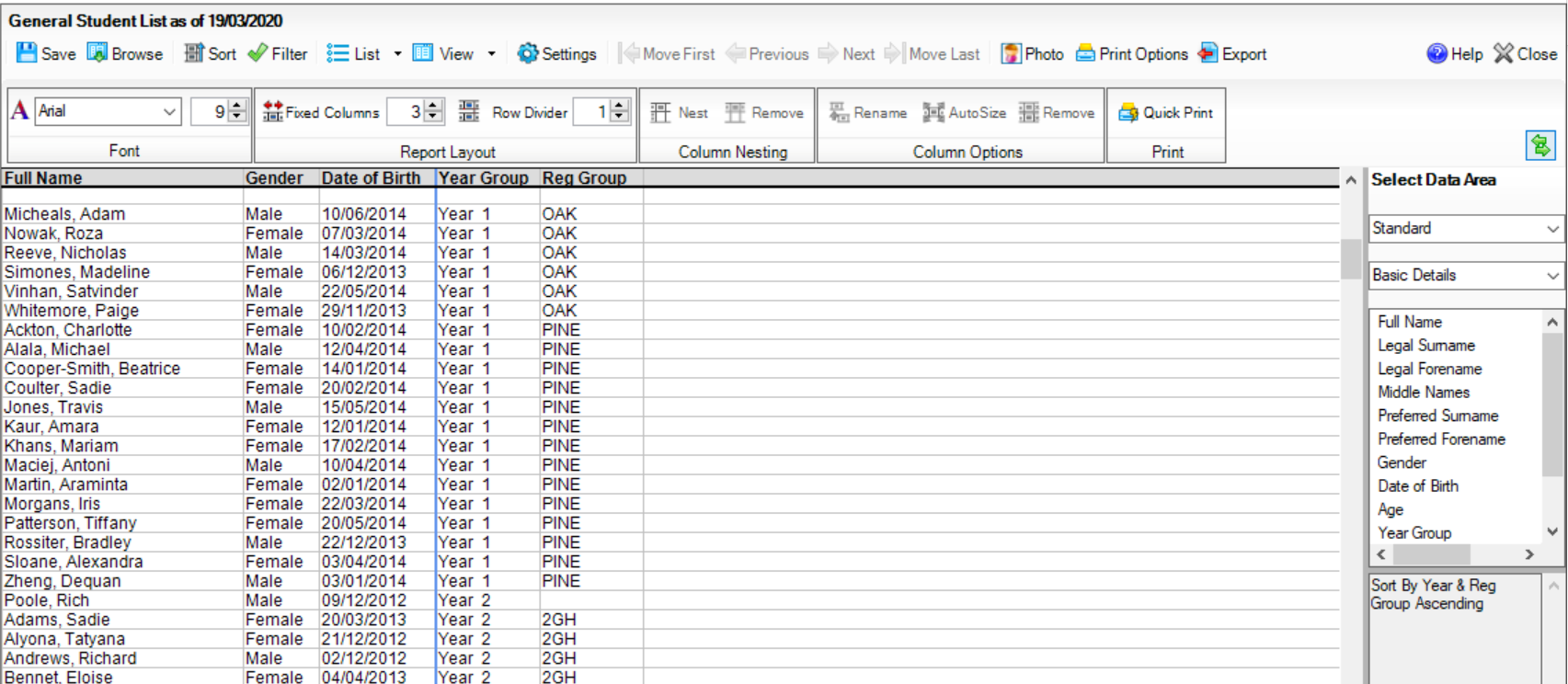
1. **Student List Reports**

Click on **Reports | Student List | General Student List**. The report will initially populate with all pupils/students within the School.

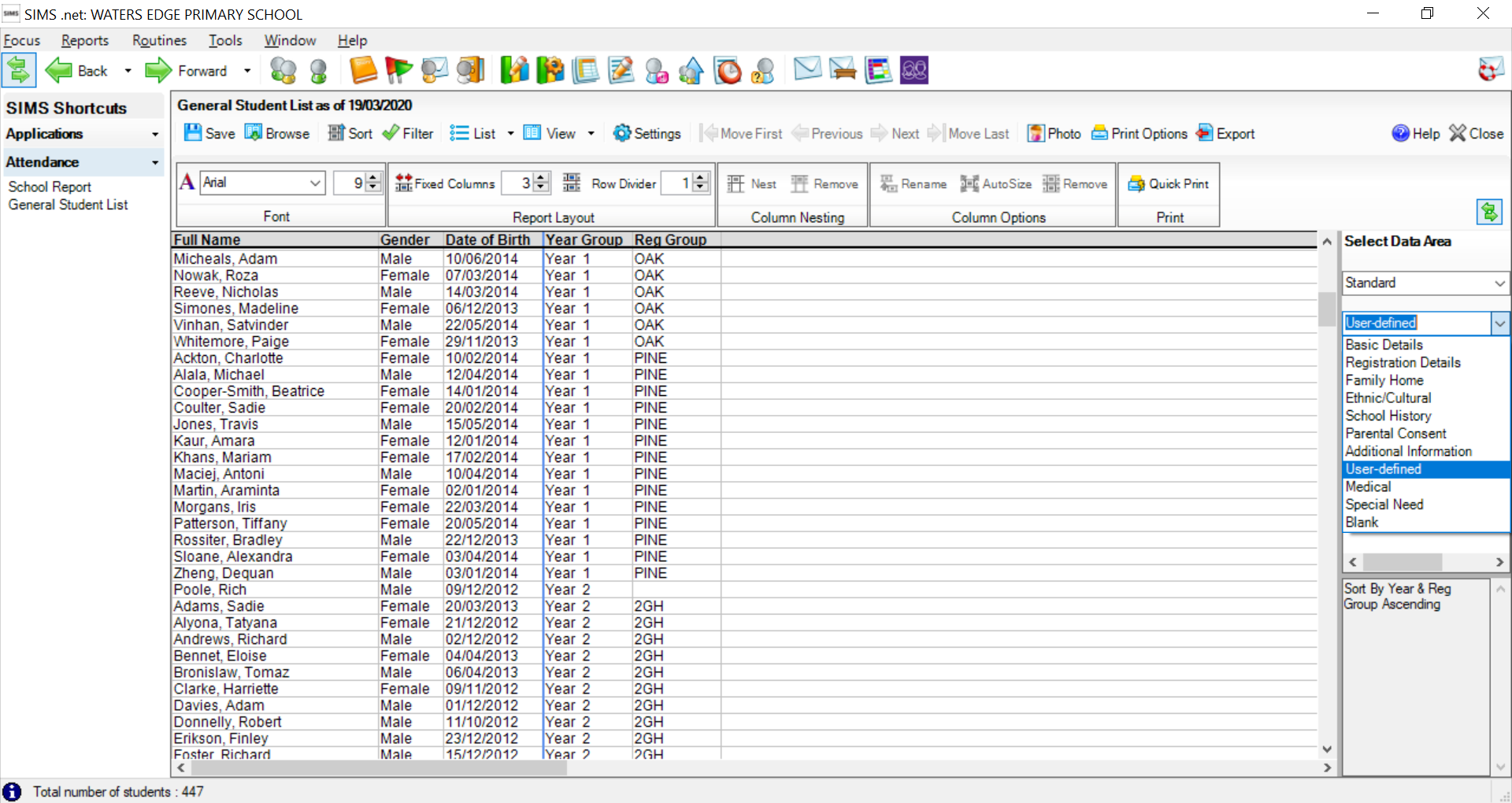
**To Filter, Sort and Delete Columns** click on thegreen tick to Filter or the Sort button. If you right click on a Column Heading the column can be deleted if not required.



In the example below we have made use of the sort functionality:



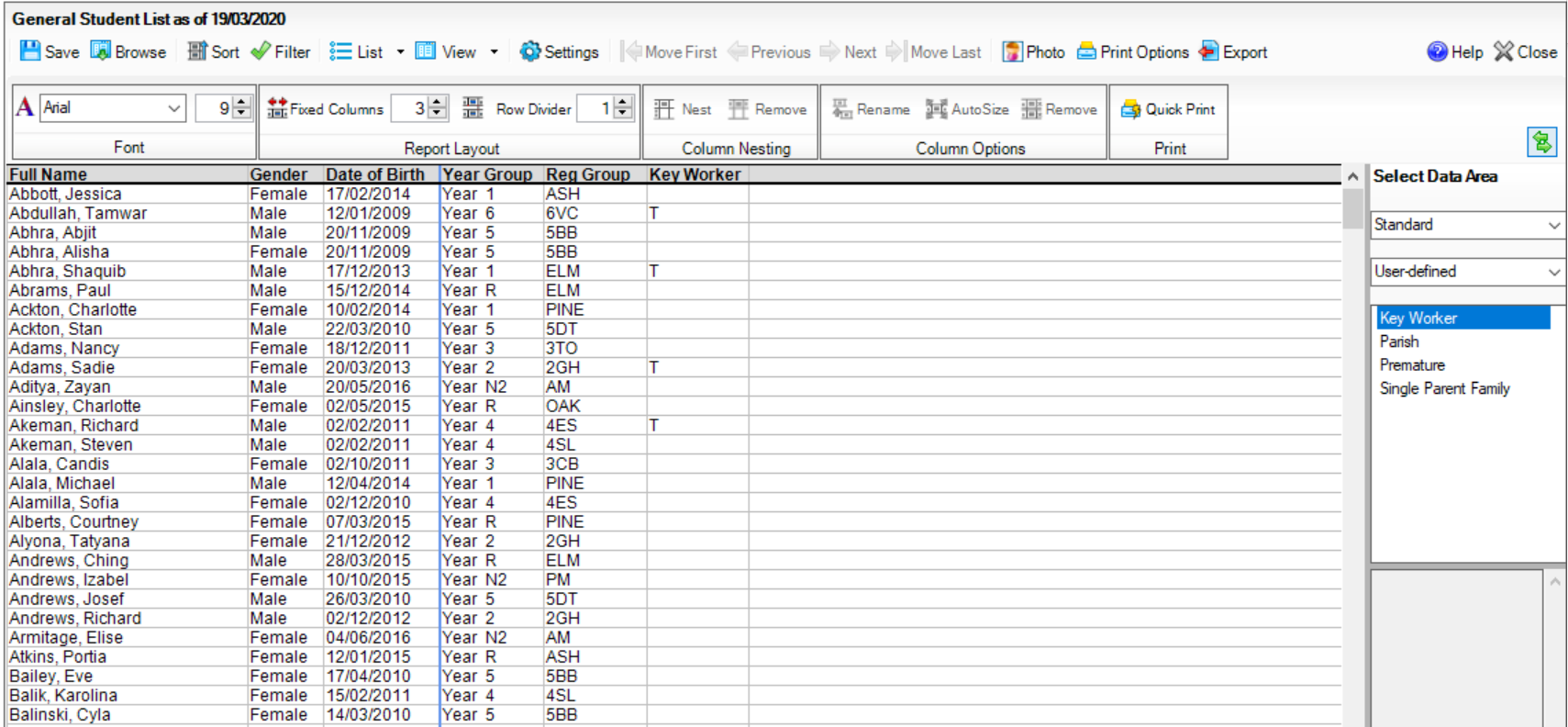
Other fields can be added by changing the various options utilising the drop-down menus.



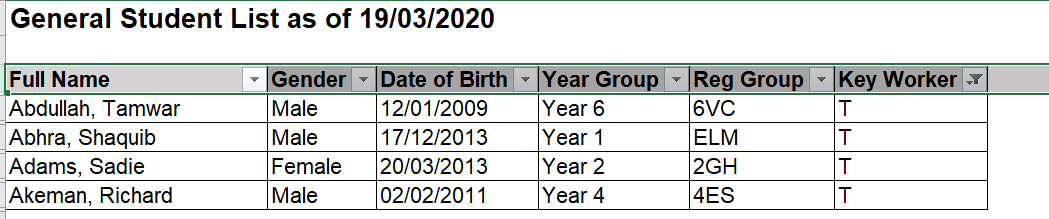
In the example above the right-hand panel shows that the User Defined Option has been selected in the second drop-down menu. Once selected a list of User Defined Fields will populate underneath.

Simply left click and drag the Key Worker UDF across to the ‘white space’ in the report and release the mouse drop into the grid. Selecting Family Home and Contacts will allow for Priority 1/2 Contacts to pull~~ed~~ through.

The UDF cannot be filtered but the report can be exported to excel where additional filtering can be applied. Alternatively you can print the report directly using the Print button.

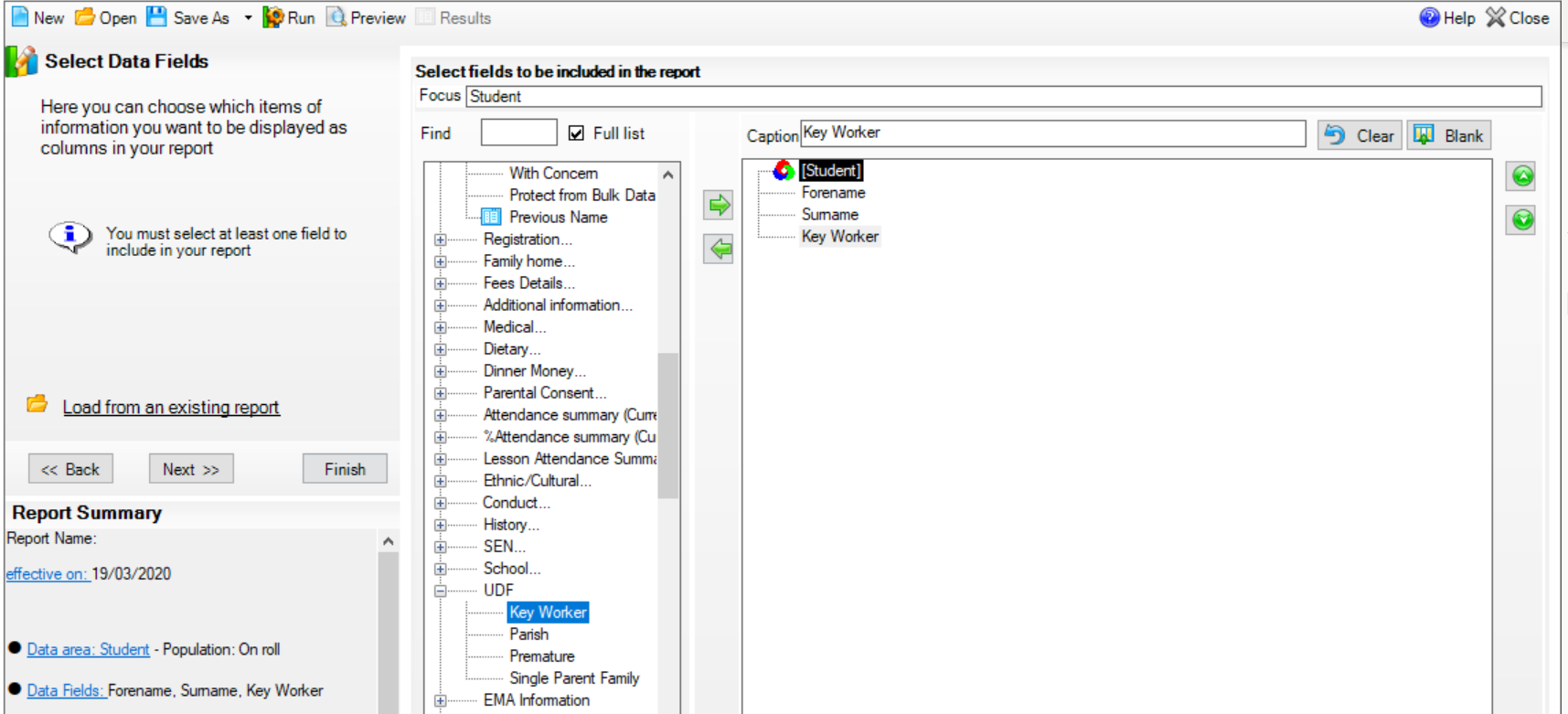


**Example Excel Output**



1. **SIMS Report Design**

**Click on Reports | Design Report |** **Create a New Report** **| Student.** Click on **Next** then **Next** again to confirm **‘On Roll’** selection for the Data Area**.**  Click Next. Select some fields in the left data panel by double clicking on them eg. Forename, Surname. Then scroll down to the User Defined section and click on the ‘+’ next to UDF to open the User Defined Fields list. Key Worker will be listed. Double click on Key Worker (or highlight and select the green right pointing arrow) to transfer the field into the right hand panel.



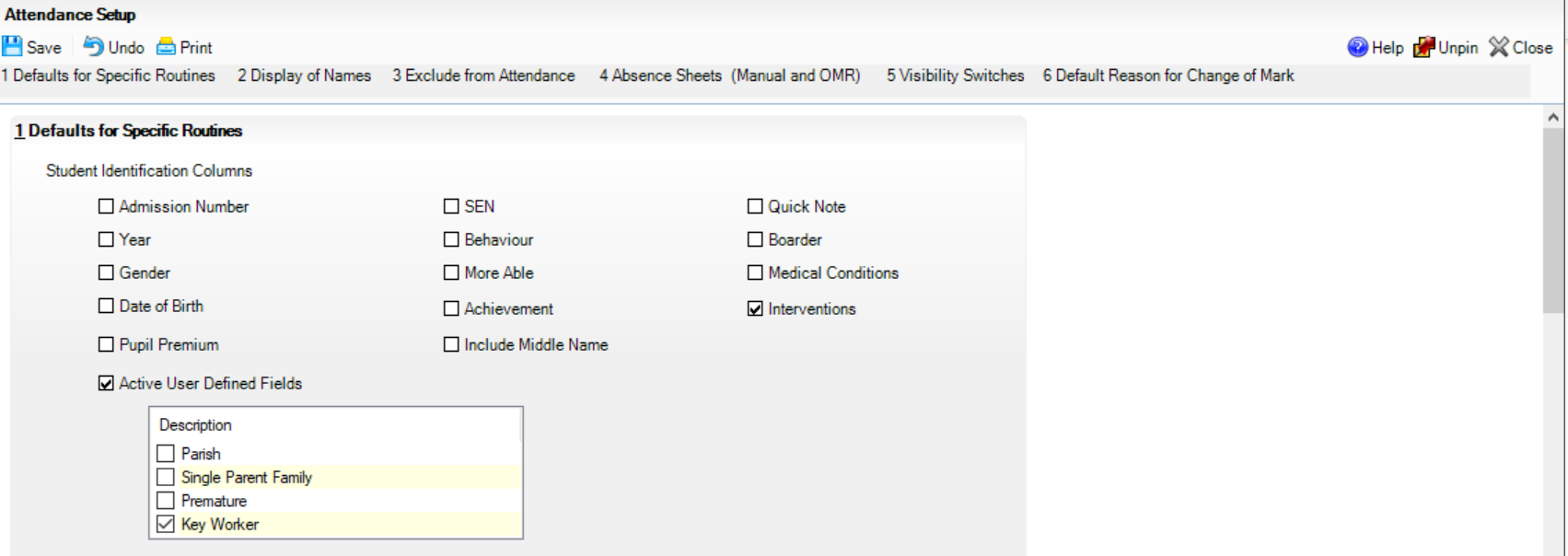
Continue to work through the report menu routes to filter, sort and format your report before printing.

1. **Displaying User defined fields in the Register**

You can set up your attendance registers – Take Registers that Classroom Staff use or Edit Marks that support staff use to display pre-selected User Defined Field columns:

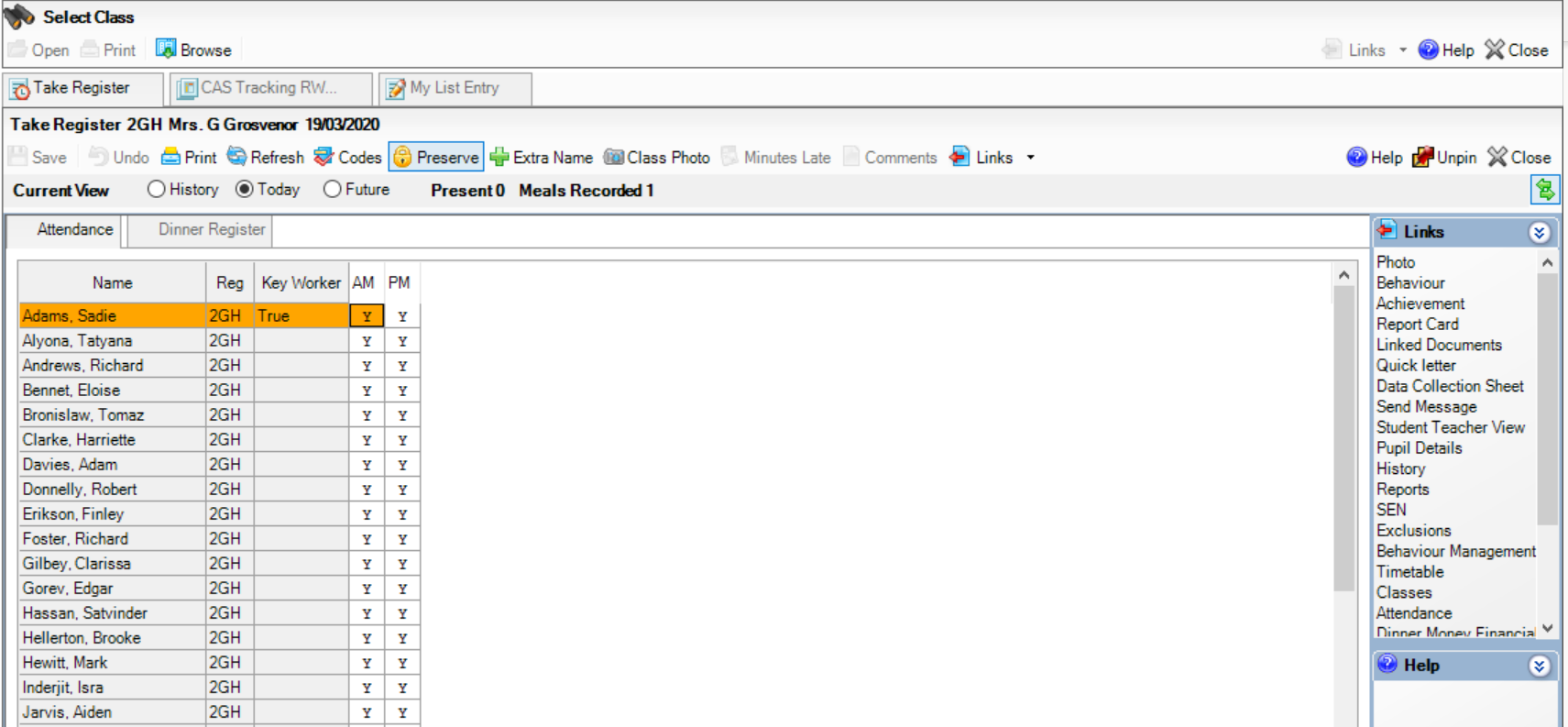
**Click on** **Tools | Setups | Attendance Setup | Module Setup**

Ensure that you tick the ‘Active User Defined Fields’ option and then select the field(s) for classroom and supporting staff to see eg. Key Worker (see below). Click on **Save** to confirm the selection.



The Column will now be visible in the register panel.

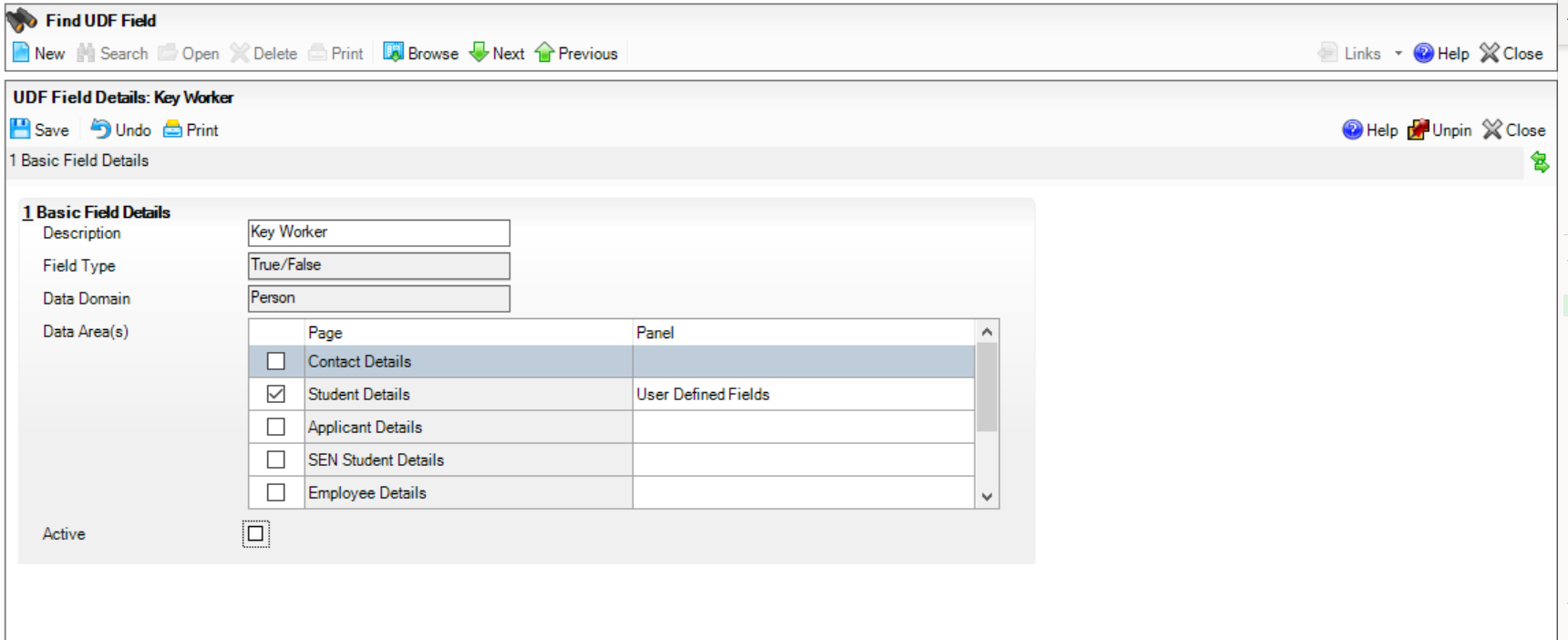
**CARE: Advise classroom staff to be careful when projecting attendance registers on their white boards especially where additional columns of data are being used as the data contain sensitive information.**



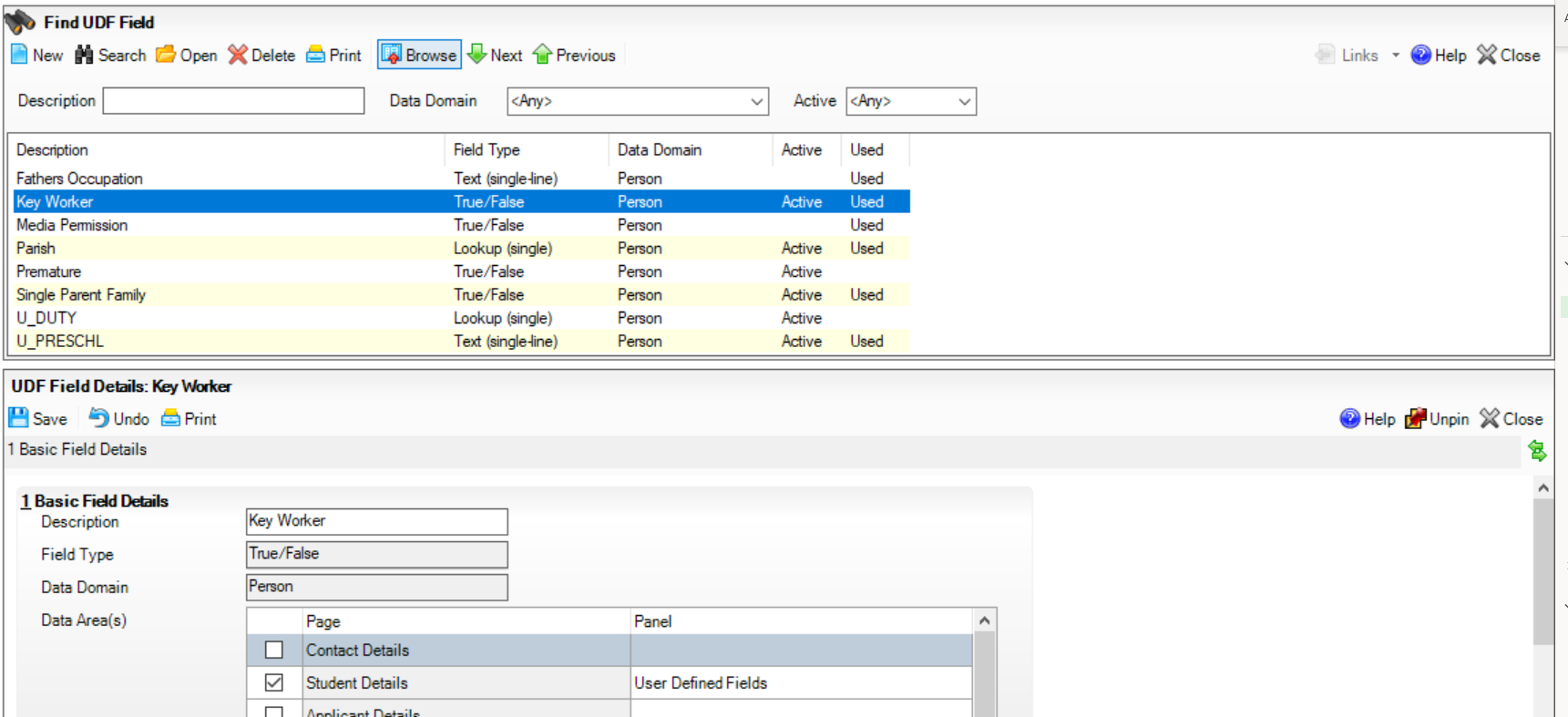
1. **Making user defined fields inactive/deletion**

User defined fields can be made inactive so that they can no longer be selected however you can still select the data to report on

Click on **Tools | Setups | User Defined Fields** ~~and~~ select the required field(s), remove the tick from the ‘Active’ box and click on Save.



To delete a User Defined Field click on **Tools | Setups | User Defined Fields,** select the UDFto highlight and then click on the ‘Delete’ button (see below).



You will be prompted to confirm your selection choice for deletion. Click on Yes to confirm.

