SIMS

Managing Pupil/Student Attendance

applicable to 7.190 onwards

Handbook

Revision History

Version	Change Description	Date
7.190 - 1.0	Initial release.	16/10/2019

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

publications@capita.co.uk

Please ensure that you include the module name, version and aspect of documentation on which you are commenting.

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01 | **Getting Started with Attendance**

Overview

This handbook provides the information required to manage pupil/student session attendance at your school using the SIMS Attendance software. Features include taking the register, editing marks and housekeeping routines.

Attendance assists schools in the recording and monitoring of statutory session attendance and punctuality. There are editing routines to assist with the following up of unexplained absences. The number of minutes late a pupil/student arrives late for registration can be recorded, as can comments, if applicable.

If a group or an individual is going to be absent for several days, e.g. on a school trip, this absence can easily be recorded for the whole date range. Likewise, if the school is informed in advance of medical appointments, approved holiday, etc. this information can be entered on the appropriate registers.

Registers can be marked on networked classroom computers, if available. Alternatively, the data can be entered later, using the bulk entry method via the Edit Marks routine.

Attendance includes many reports on individual pupil/students and on groups. Some reports show all the attendance marks for sessions, others show the total number of present and absence marks or percentage attendance. The Individual Student's Attendance Summary by Subject report is designed to be sent home to parents, others are intended to support the monitoring of attendance by registration tutors or pastoral staff.

Additional Resources:

Producing Attendance Reports handbook
Attendance Reports Specification handbook
Producing Attendance Reports Quick Reference Sheet
Recording Attendance using an Optical Mark Reader mini guide

What's New in this Release

Additional Attendance Setup Options

Tools | Setups | Attendance Setup | Module Setup

When selecting **Defaults for Specific Routines** for **Student Identification Columns**, the following new options are available:

- **Include Middle Name** - middle name is included in the **Name** column in Attendance/Lesson Monitor grids where pupil/student names are listed.
- **Active User Defined Fields** - one option only can be selected from a list of all active pupil/student/applicant user defined fields. The selected option is then displayed as an identification column in Attendance/Lesson Monitor grids where pupil/student names are listed.

The following new options are available when selecting the required defaults for pupil/student **Display of Names**:

- **Show Forename before Surname**
- **Include Middle Name**.

The following new options are available when selecting the required defaults for **Order of names in registration group list**:

- **Order names by Preferred Surname**
- **Order names by Legal Surname**
- **Order names by Preferred Forename**
- **Order names by Legal Forename**.

More Information:
Setting up the Defaults for Specific Routines on page *5*
Defining how Names are Displayed on page *6*

Permissions and Licensing Requirements

You must have the appropriate permissions to use the functionality outlined in this handbook. This entails being a member of one or more of the following System Manager User Groups:

- Administration Assistant
- Attendance Manager
- Attendance Operator
- Class Teacher
- Registration Tutor
- School Administrator
- Senior Management Team

Please contact your System Manager if you are unsure whether you have the applicable permissions.

For more information on setting up permissions, please refer to the *Managing SIMS Users, Groups and Databases* handbook. For a list of the permissions available for each release, please refer to the appropriate permissions spreadsheet, available on our My Account website (https://myaccount.capita-cs.co.uk) by searching for PERMLIST.

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.

Documentation is also available from the My Account website (https://myaccount.capita-cs.co.uk).

1. Enter the required text in the Search field to display a list of documents that match the search criteria.

2. To refine the search further, click **Documents** and then select the required **Document type**, **File type** and/or **Date** range (click **Show more** to view additional options, if required).

Alternatively, click **SIMS Publications** located in the **Popular Searches** list to display a list of all SIMS publications.

The search results are displayed automatically.

Tips for using the My Account Search Facility

Here are some key tips for using the search facility in My Account. For additional explanations, please refer to the My Account website.

> *NOTE: You no longer need to use + / - / "" when searching.*

- Cut down on the amount of words that you type in the search field and only use key words, e.g. instead of typing `pupil/student showing as a contact` search for the word `contact`.
- Use the **Product Type** filter to refine results further.
- Use the advanced filters located on the left-hand side of the **Search results** page.

> *NOTE: Separate documents are available for SIMS Attendance, Attendance reports and Optical Mark Reader information.*

02| Setting up Attendance

Setting up Attendance Module Options

Various setup options are available that affect the display of data, e.g. additional pupil/student identification columns on the Take Register and Edit Marks grids. Different areas of the module are affected, depending on the options selected.

These options can be selected and deselected between routines as required. For example, pupil/students with a date of birth after a specified date can be excluded before a report is run. The exclude option can then be deselected, so that the pupil/students are included when other routines are performed.

IMPORTANT NOTE: *Many of the setup options take effect only after SIMS is restarted.*

Setting up the Defaults for Specific Routines

1. Select **Tools | Setups | Attendance Setup | Module Setup** to display the **Attendance Setup** page.

2. In the **Defaults for Specific Routines** panel, select the check box adjacent to each of the required **Student Identification Columns**.

- **Admission Number**, **SEN**, **Quick Note**, **Year Behaviour**, **Boarder**, **Gender**, **More Able**, **Medical Conditions**, **Date of Birth**, **Achievement**, **Interventions** and **Pupil Premium**:

  When the applicable routine is run, these columns can be hidden temporarily (one at a time) by right-clicking any of the identification columns to display a pop-up menu, then deselecting the check box associated with the column you want to hide. The next time the routine is run, the default **Student Identification Columns** are displayed again.

  The selected columns are displayed by default in all routines where pupil/student names are listed, e.g. **Focus | Attendance | Take Register**, **Edit Marks**, **Deal with Unexplained Absences**, **Deal with Missing Marks**, etc.

Name	Reg	DOB	Gender	Year	Ad No	SEN	Behaviour today	G&T	Achievement today	Quick Note	Boarder	Medical Condition	PP	Interventions
Adebayor, Emmanuel	6KH	15/02/2006	Male	6	001068						Boarder, night not specified		•	
Americana, Kari	6KH	30/01/2006	Female	6	001069			•		•	Not a Boarder		•	1
Barbousci, Harold	6KH	24/05/2006	Male	6	001073	A	1			•	Not a Boarder	•	•	
Barnett, Gary	6KH	14/02/2006	Male	6	001074				1	•	Not a Boarder		•	1
Barnett, Jamie	6KH	14/02/2006	Male	6	001076		1	•			Not a Boarder		•	2
Bond, Jamie	6KH	01/01/2006	Male	6	001077	S		•	1		Not a Boarder	•	•	
Cole, Billy	6KH	28/04/2006	Male	6	000000				1					

- **Include Middle Name**: If this option is selected, the middle name is included in the **Name** column in Attendance grids where pupil/student names are listed.

- **Active User Defined Fields**: One option only can be selected from a list of all active pupil/student or applicant user defined fields. The selected option is then displayed as an identification column in Attendance/Lesson Monitor grids where pupil/student names are listed.

3. Specify the number of weeks to be displayed when editing session marks (via **Focus | Attendance | Edit Marks**) selecting **1**, **2** or **3** from the drop-down list.

4. Click the **Save** button.

   More Information:
   Displaying Additional Pupil/Student Identification Columns on page *34*

Defining how Names are Displayed

The **Display of Names** panel enables schools to specify the order in which pupil/student names are displayed in a list. The options selected in this panel are reflected in most screens or reports that display a list of pupil/student names, e.g. Take Register, Edit Marks, etc.

1. Select **Tools | Setups | Attendance Setup | Module Setup** to display the **Attendance Setup** page.

2. Click the **Display of Names** hyperlink to display the **Display of Names** panel.

3. Select the check box adjacent to the required option. One or more can be selected:

   - **Show House after Name** - to insert an additional column (**House**) after the **Name** column.
   - **Show Forename before Surname**
   - **Show Preferred Forename instead of Legal Forename**
   - **Show Preferred Surname instead of Legal Surname**
   - **Include Middle Name**.

4. Specify the **Order of names required in registration group lists** by selecting the required check box(es).

   The following options are available:

   - **Order names by Year Group**
   - **Order names by Gender**
   - **Order names by Date of Birth**
   - **Order names by Preferred Surname**
   - **Order names by Legal Surname**

- **Order names by Preferred Forename**
- **Order names by Legal Forename**.

> *NOTE: The options available in the **Order of names in registration group list** are reliant on the options selected in the **Display of Names** section.*
>
> *The **Order names by Gender** check box can be selected along with either the **Order names by Year Group** or **Order names Date of Birth** check box (but not both).*
>
> *The selected **Order of names in registration group list** is applicable to sessions where **Reg Group** is selected as the **Group Type** only.*

5. Click the **Save** button.

Excluding Pupil/Students from Attendance
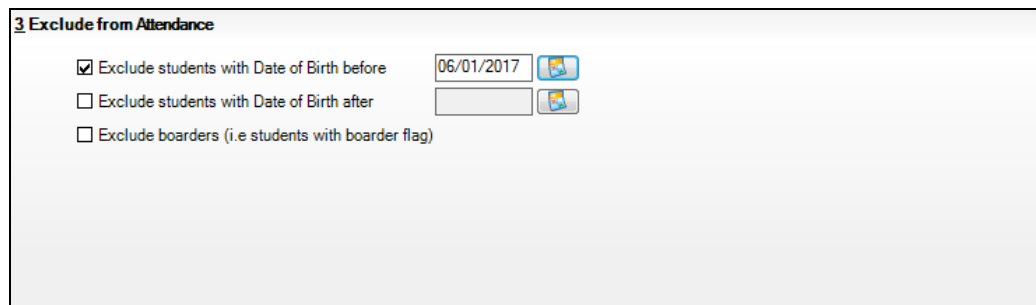
Those pupil/students outside of compulsory school age are not always expected to attend registration and can therefore be excluded.

Selecting one of the **Exclude from Attendance** check boxes ensures that the selected pupil/students will not be displayed in any of the attendance routines or in any reports.

1. Select **Tools | Setups | Attendance Setup | Module Setup** to display the **Attendance Setup** page.

Those pupil/students outside of compulsory school age are not always expected to attend registration and can therefore be excluded.

2. Click the **Exclude from Attendance** hyperlink to display the **Exclude from Attendance** panel.

3. To specify the pupil/students to exclude, select one or both of the following check boxes:
   - **Exclude students with Date of Birth before**
   - **Exclude students with Date of Birth after**.

4. For each option selected, enter the appropriate date in the adjacent field or click the associated **Calendar** button and select the required date.

 Calendar button

5. Select the **Exclude boarders (i.e. students with boarder flag)** check box to prevent boarders from being displayed on reports and registers (e.g. the Edit Marks routine, Display Marks routine, etc.).

   When selected, all **Boarder Status** lookup values are displayed. Select the values you want to exclude.

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*NOTE: The **Not a Boarder** option is a **Boarder Status** lookup and is displayed automatically. It is used in other areas of SIMS to define pupil/students who are not boarders.*

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6. Click the **Save** button.

Including Missing Marks on Manual Absence Sheets

1. Select **Tools | Setups | Attendance Setup | Module Setup | Module Setup** to display the **Attendance Setup** page.

2. Click the **Absence Sheets (Manual and OMR)** hyperlink to display the **Absence Sheets (Manual and OMR)** panel.

3. To ensure that both manual (and OMR absence sheets, if applicable) include pupil/students with missing marks, select the **Absence sheets to include pupils with missing marks** check box.

Additional Resources:

Recording Attendance using an Optical Mark Reader mini guide

Specifying Visibility Switches

Visibility switches enable certain options to be displayed or hidden as required*.*

1. Select **Tools | Setups | Attendance Setup | Module Setup | Module Setup** to display the **Attendance Setup** page.
2. Click the **Visibility Switches** hyperlink to display the **Visibility Switches** panel.

3. Select the required check box(es):

    ▪ **Show Accepted Applicants at Take Register**
       In the first few weeks of the school year, there may be accepted applicants who are attending school but have not yet been admitted into the system.

       Selecting this check box enables registration tutor/teachers to enter registration marks for such applicants.

    ▪ **Show OMR Entry**
       When this check box is selected, the OMR Attendance setup (**Tools | Attendance Setup | OMR Setup**) and the OMR printing and reading routines (**Routine | OMR Entry**) are available for use.

    ▪ **Use Toggle marks within Take Register**
       Selecting this check box allows the use of the mouse to toggle between **/** (present), **N** (no reason yet provided for absence) and **–** (no mark recorded) by clicking the pupil/student's name when marking the register. This functionality is particularly useful for schools that use Tablet PCs or interactive whiteboards.

    ▪ **Show Part-time Students**
       The part-time pupil/student functionality is available via a dedicated menu route (**Tools | Setups | Attendance Setup | Part Time Pupils**) when this check box is selected (please see *Dealing with Part-time Pupil/Students* on page *15*).

    ▪ **Use Welsh**
       This option is only applicable to schools that selected **Wales** as their **Region** when SIMS was configured.

       If your school uses OMR sheets, they are printed in Welsh when this check box is selected.

4. Click the **Save** button.

Additional Resources:

Recording Attendance using an Optical Mark Reader mini guide

More Information:

Setting up a Default Reason for Change of Mark

SIMS checks if a mark already exists for that session or lesson when a mark is saved. If an existing mark is found, the change of mark and reason for the change is recorded. The exception is where an **N** (no reason yet provided for absence) has been changed to a reason for absence, e.g. from **N** to **M** (medical/dental). This is because **N** is a temporary code that schools expect to change.

A **Default Reason for Change of Mark** must be specified. By default, **Original entry made in error** and **Other** are available for selection. Additional values can be added to the **Reason For Change of Mark** lookup by selecting **Tools | Lookups | Maintain**.

Additional Resources:

Setting up and Administering SIMS handbook

1. Select **Tools | Setups | Attendance Setup | Module Setup** to display the **Attendance Setup** page.
2. Click the **Default Reason for Change of Mark** hyperlink to display the **Default Reason for Change of Mark** panel.

3. Select the required default reason for change of mark from the drop-down list.
4. Click the **Save** button.

If the selected default reason for change is not appropriate for all changed marks, individual reasons for change can be edited via **Routines | Lesson Monitor | Edit Reason for Change**.

Setting up the School Working Days

Applicable to the India Region only

School Administrators can enter the school working days in SIMS, so that each term (term 1 and term 2) are correctly defined.

1. Select **Tools | Setups | Attendance Setup | School working Days** to display the **School Working Days** page.
2. Select the required **Academic Year** from the drop-down list.
3. Enter the number of **Possible Sessions** for each **Year** and term.
4. Click the **Save** button.

Maintaining Attendance Codes

Codes are used to record whether a pupil/student is present or absent at registration. A variety of codes are available to indicate the different reasons for the absence. There are also codes that indicate that the pupil/student is not required to attend school, e.g. because it is a school holiday.

The Maintain Codes functionality enables the Attendance Manager, among others, to maintain the list of attendance codes, customise them for use at their school, if this is permitted by the authority, and restrict the marks available for use by Class Teachers.

NOTES: Session registration codes are non-editable in England and Northern Ireland, as any changes to the codes will cause statutory returns to fail. For this reason, additional session registration codes cannot be added.

More Information:
Session Registration Codes in England on page *149*
Session Registration Codes in Northern Ireland on page *153*

Restricting the Use of Attendance Codes

This functionality provides Attendance Managers with the ability to control which of the attendance codes are available for use by Class Teachers when taking the register. These codes are defined as **Basic**.

Initially, all codes are defined as **Basic** provided all Attendance users access to all marks. If the Senior Management Team wishes to make use of this new feature, the Attendance Manager should select the Maintain Codes routine then define the restrictions as required.

The recommended set of codes is **/** (Present AM), **** (Present PM), **L** (Late (before registers closed)) and **N** (No reason yet provided for absence), though some users may want to add others e.g. **V** (Educational visit or trip) or **R** (Religious observance).

1. Select **Tools | Setups | Attendance Setup | Codes | Maintain Codes** to display the **Maintain Codes** page.

2. Highlight the code for which you want to restrict the use, then click the **Edit** button. Alternatively, double-click the code to display the **Edit Codes** dialog.

3. Deselect the **Basic** check box.
4. Click the **OK** button to return to the **Maintain Codes** page.

Codes available for use by Class Teachers are displayed as **Basic** in the **Basic mark** column.

All codes are available to users who belong to the permission groups Attendance Operator and Attendance Manager.

More Information:
Entering Registration Marks on page *27*

Editing Session Registration Codes (if applicable)

This routine is for use by schools that have editable session codes. Please see previous note.

The **Description**, **Statistical Meaning** and **Physical Meaning** of many codes can be edited (if this is permitted by your authority), although the code itself is non-editable. Any changes apply to existing marks and marks entered in the future.

1. Select **Tools | Setups | Attendance Setup | Codes | Maintain Codes** to display the **Maintain Codes** page. The page displays the current codes and their properties.

2. Highlight the code you want to edit then click the **Edit** button to display the **Edit Code** dialog.

NOTE: The **Code** and the **Active** setting <u>cannot</u> be edited, as session codes must remain active.

3. Edit one or more of the following:
   - **Description** – edit the existing text.
   - **Statistical Meaning** – select from the drop-down list.
   - **Physical Meaning** – select from the drop-down list.
4. By default, the **Active** check box is selected. This setting cannot be changed, as session codes must remain active.
5. Click the **OK** button to return to the **Maintain Codes** page.
6. Click the **Save** button to save the edited details.

Defining Late Codes

Applicable to schools that use editable session registration codes only
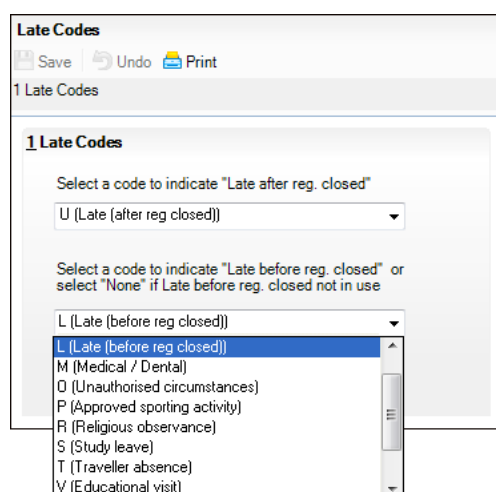
An attendance code can be defined that indicates late after registration closed.

> *NOTE: If your school uses an OMR, the defined code is used when a pupil/student is marked as having arrived late but while registration was still in progress.*

A code that indicates late before registration closed can also be defined, if this is used by your school.

Examples of these codes are **U (Late (after reg closed))** and **L (Late (before reg closed))**.

1. Select **Tools | Setups | Attendance Setup | Codes | Late Codes** to display the **Late Codes** page.

2. Select a code from the top drop-down list to indicate late after registration closed.

3. Select a code from the bottom drop-down list to indicate late before registration closed.

> *NOTE: If the late before registration closed option is not in use, select **None** (located at the top of the list).*

4. Click the **Save** button to save the settings.

Dealing with Part-time Pupil/Students

The sessions when part-time pupil/students, e.g. pupil/students of non-statutory school age, are <u>not</u> required to attend school can be specified using this routine. SIMS then applies the **no attendance required** code to the applicable sessions that occur during the specified date range.

This routine is typically used to enter marks for a future date range. The date range specified must be from the beginning of one week to the beginning of another week.

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

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*IMPORTANT NOTE: **AM** and **PM** groups are displayed only if the **Attendance Mode** AM or PM has been selected in the **Registration** panel via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**. For more information, please refer to the Managing Pupil/Students handbook.*

2. A default date range from 'the beginning of the current week to the beginning of the current week' is displayed.

   To change the date range, enter the required dates in the **From w/b** and **to w/b** fields. Alternatively, click the associated **Calendar** buttons and select the required dates.

   IMPORTANT NOTE: The date range you specify must be from the beginning of one week to the beginning of another week, e.g. Monday to Monday.

3. Select the required **Group Type** from the drop-down list:
   - **Part time Group**
     This option is displayed by default only if AM or PM attendance has been set up for part-time pupil/student via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**.
   - **Year Group**
   - **Reg Group**
   - **User-defined Group**
   - **Individual Students**.

4. Click the **Search** button to refresh the display.

5. Highlight one or more of the groups or pupil/students to which the part-time setting is to apply.

   The **Select All** and **Deselect All** buttons (located at the bottom left-hand side of the browser) can be used to assist with the selection, if required.

6. Specify when attendance is required by selecting one of the four radio buttons in the **Enter 'Not Required' codes** panel.

- **Attendance required in mornings only**
- **Attendance required in afternoons only**
- **Attendance required all day**
  Select this option when a part-time pupil/student starts full-time school. All 'Not Required' codes for the pupil/student will be removed from the system.
- **Apply a weekly pattern of Not Required codes**
  Select this option if a mixture of AM and PM sessions is required. The associated grid is enabled. Select the check boxes that represent the sessions when the pupil/students are <u>not</u> required to attend school.

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

7. Existing marks can be protected or overwritten. This is achieved by clicking the **Preserve/Overwrite** toggle button (located at the top of the page).

   🔒 Preserve   🔓 Overwrite   *Preserve/Overwrite toggle button*

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

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

Defining and Maintaining Early Years Provisions

Applicable to English Primary schools (including Independent Multiphase schools) only

Schools with a dedicated nursery unit, that offer early years care, must present parents of three to four year olds with the choice of varying nursery hours on any day of the week.

Parents are now entitled to receive 15 hours of free nursery provision per week, which can be taken over a minimum of three days. They can choose to take as much or as little of the 15 hours, and use their entitlement at more than one nursery provider, if they wish.

Attendance Setup includes the facility to define Early Years Provisions, from which Early Years Attendance patterns can be created for applicable applicants and pupils, so that Hours at Setting can be calculard for nursery age pupils, for School Census purposes.

Routine	Purpose
Define Provision Types via **Tools	Setups	Attendance Setup	Early Years Provisions Setup**.	This routine sets up the start and end times of each available nursery session.
Set up early years attendance patterns for applicants, via **Focus	Admission	Application**. Please refer to the *Managing Pupil/Students* handbook (Chapter 9, *Setting up the Early Years Attendance Patterns for an Applicant*).	This routine enables you to define the daily attendance pattern for each nursery applicant.
Set up early years attendance patterns for nursery pupils, via **Focus	Pupil** (or **Student**) **	Pupil** (or **Student**) **Details**. Please refer to the *Managing Pupil/Students* handbook (Chapter 6, *Setting up the Early Years Attendance Patterns for Pupils*).	This routine enables you to define the daily attendance pattern for each nursery pupil.
Update hours at setting for 2, 3 and 4 year olds via **Tools	Statutory Return Tools	Update Hours at Setting for 2** (or **3** or **4**) year olds. Please refer to the appropriate School Census Return handbook.	This tool enables hours at setting for nursery age pupils to be updated automatically based on each pupil's attendance pattern or input manually if attendance patterns are not recorded.

This following routine enables your school to define the periods of nursery care provision that are available to parents at your school.

Defining a New Early Years Provision

A pupil can only have one provision type per day, therefore the provision types must be defined accordingly. If provision times overlap sessions, a decision as to which session to map to must be made, e.g. should a 9.00am to 2.00pm provision be mapped to an **AM** or an **All Day** category.

Four predefined Nursery Care Provision Type lookups are available for selection when defining or editing an early years provision:

- **Provision 1**
- **Provision 2**
- **Provision 3**
- **No Provision**.

These Provision Type lookups can be edited or deleted via **Tools | Lookups | Maintain**. For example, you may wish to change **Provision 1** to `Provision 9.30-12.00`. Additional Provision Type lookups can also be defined, if required. Ensure that the **Data Area** is specified as **Attendance** and that the appropriate **Category** (i.e. **AM**, **PM** or **AllDay**) is defined. For more information, please refer to the *Setting up and Administering SIMS* handbook.

When defining an Early Years Provision, the time each day that nursery care provision is available and the date that it becomes effective must be specified. The end date can also be specified, if known.

1. Select **Tools | Setups | Attendance Setup | Early Years Provisions Setup** to display the **Find Early Years Provisions** browser.

2. Click the **New** button to display the **Early Years Provision Details:** page.

3. Select the required **Provision Type** from the drop-down list, e.g. Provision 1.

4. By default, the selected **Provision Type** is displayed in the **Description** field. This description can be edited to describe the nursery care provision more clearly, e.g. Morning Nursery Care, if required.

5. By default, the **Start Date** is displayed as today's date. If necessary, edit the date to indicate when the nursery care provision is to start or click the **Calendar** button and select the required date.

6. Optionally, enter an **End Date** for the provision (if known) or click the **Calendar** button and select the required date. This date can be entered later.

7. Enter a **Start Time** and an **End Time** for the provision in hh:mm (24 hour) format.

8. Click the **Save** button.

9. To print the provision details, click the **Print** button to display the **Print** dialog. Check that the printer settings are correct for your printer then click the **OK** button.

Searching for a Previously Defined Early Years Provision

A previously defined early years provision can be viewed, edited, printed or deleted, as required.

1. Select **Tools | Setups | Attendance Setup | Early Years Provisions Setup** to display the **Find Early Years Provisions** browser.

2. Specify one or more of the following:

   ▪ **Description**

   ▪ **Provision Type** – select from the drop-down list.

   > *NOTE: Any Provision Type inactive items that are no longer in use but still exist in SIMS can be viewed or hidden. This is achieved by clicking the **Inactive Items** toggle button (adjacent to the **Provision Type** field). The inactive items are clearly identified by red text.*

- **From Date** – enter a date or click the **Calendar** button and select the required date.
- **To Date** - enter a date or click the **Calendar** button and select the required date.

3. Click the **Search** button to display all provisions that match the criteria entered. If no criteria are selected, all provisions are listed.

4. To delete a provision that is not currently in use, highlight it then click the **Delete** button. Confirm that you wish to delete the selected provision by clicking the **Yes** button.

   If the highlighted provision is in use, i.e. it has been use to set up an Early Years Attendance Pattern (via **Focus | Admission | Application** or **Focus | Pupil | Pupil Details**), the following message is displayed:

   Provision Type cannot be deleted as it is in use.

5. To print the list of provisions, click the **Print** button to display the **Print** dialog. Check that the printer settings are correct for your printer then click the **OK** button.

6. To view or edit a provision, highlight it then click the **Open** button. Alternatively, double-click the required provision to display the **Early Years Provision Details** page.

Editing an Early Years Provision

All aspects of a nursery care provision can be edited regardless of whether it is currently being used or not. Therefore, the provision type, associated start and end dates, and the start and end time can all be amended, if required.

1. Select **Tools | Setups | Attendance Setup | Early Years Provisions Setup** to display the **Find Early Years Provisions** browser.

2. Search for then select the required nursery care provision to display the **Early Years Provision Details:** page (please see *Searching for a Previously Defined Early Years Provision* on page *20*).

3. Select a different **Provision Type** from the drop-down list, if required.

4. Edit the **Description**, if required.

5. Edit the **Start Date** and/or **End Date**, if required. Alternatively, click the **Calendar** button and select the required date.

6. Edit the **Start Time** and/or **End Time** for the provision using hh:mm (24 hour) format, if required.

7. Click the **Save** button to retain your changes.

   It is advisable for schools to use the part-time pupils routine (via **Tools | Setups | Attendance Setups | Part-time Pupils**) to provide an indication in the register of the sessions that the pupil is or is not expected to attend (based on the AM and/or PM defined for each of the provisions selected as part of the attendance patterns).

   More Information:
   Dealing with Part-time Pupil/Students on page *15*

03 | **Taking the Register**

Introduction to the Take Register Routine

The Take Register routine is used to mark pupil/students as present for, or absent from, their session registration. If a pupil/student arrives late for a session, absent can be changed to present (or late) and the number of minutes late can be recorded as required.

Comments about a particular pupil/student attending the session can also be added, e.g. `Tom forgot his homework again`.

The **Today** view is used to enter marks for the current session. Any marks previously entered for today, e.g. medical appointments, holidays, etc. are displayed in this view.

> *NOTE: If a pupil/student is scheduled to have a detention at any point during 'today', a red D is displayed next to the pupil/student's name on the register.*

Another key use for the Take Register routine is to display information about previous marks for the pupil/students in the current session registration. For example, if a pupil/student is absent from the current session registration, the registration tutor/teacher can check to see if they were absent from the previous session registration as well. The **History** view displays marks for these pupil/students at previous session registrations, i.e. when the registration group met in the previous five school days.

A **Future** view is also available to enable staff with appropriate permissions to view and enter marks, e.g. medical appointments, family holidays, etc. for the next five school days.

To ensure that the data displayed is up-to-date, a **Refresh** button is available. This option can be used when data is entered by multiple users or when biometric devices, swipe cards or other external systems are in use.

Accessing the Register

The register can be accessed via the SIMS **Home Page** or the **Focus** menu.

Accessing the Register via the SIMS Home Page

If you are a registration tutor/teacher and the system recognised you as such when you logged into SIMS, your timetable for today is displayed in the **My Timeline** panel on the SIMS **Home Page**.
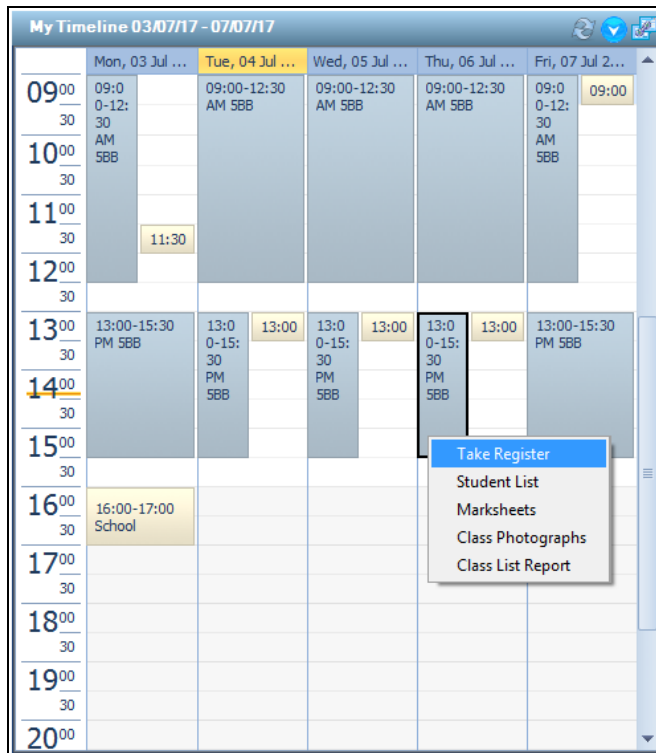
Right-clicking the required session displays the following options:

- **Take Register** - displays the registers for the selected day.
- **Student List** - displays the Supervisor's name and a list of pupil/students in the selected registration group. To view the details of a pupil/student included in the list, double-click their name to display the **Pupil History** page.
- **Marksheets** - displays the marksheet for the selected class.
- **Class Photographs** - displays a dialog showing pupil/student photos that are stored in SIMS (please see *Viewing the Class Photograph* on page *54*).
- **Class List Report** - displays a registration group list report (**Name**, **Gender**, **Date of Birth**, **Year Group**, **Reg Group**).

Additional Resources:

Configuring and Using the SIMS Home Page mini guide

1. Select **Focus | Home Page** to display the SIMS **Home Page**.

2. Double-click the required session in the **My Timeline** panel.

    Alternatively, right-click the required session then select **Take Register** from the drop-down list to display the **Take Register** page.

The **Select Class** browser, which displays the timeline, is hidden but can be displayed by clicking the **Browse** button.

More Information:
Configuring the Attendance Summary Panel on page *104*

Accessing the Register via the Focus Menu

Select **Focus | Attendance | Take Register** to display the **Select Class** browser. Alternatively, click the **Take Register** button on the SIMS Focus Bar.

 Take Register button

Registration Tutor/Teachers

If the system recognised you as a registration tutor/teacher when logging into SIMS, your name is displayed in the **Teacher** field in the **Select Class** browser and the current session is highlighted on the timeline.

Today's date is displayed by default but can be changed by entering the required **Date** or clicking the **Calendar** button and selecting the required date.

 Calendar button

Double-click the required session on the timeline or highlight the session and click the **Open** button to display the associated register.

Staff Covering for Registration Tutor/Teachers

If you are covering for a registration tutor/teacher or you are, for example, an administrator who wishes to view registration groups, you must first select the required registration group.

1. Select **Focus | Attendance | Take Register** to display the **Select Class** browser.
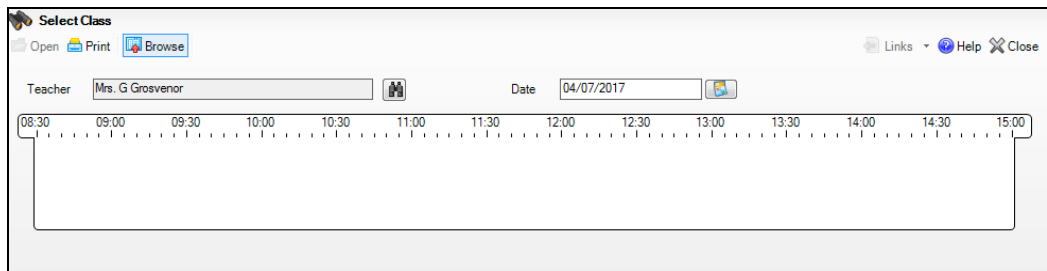
2. Today's date is displayed by default but can be changed by entering the required **Date** or by clicking the **Calendar** button and selecting the required date.

3. Click the **Search** button adjacent to the **Teacher** field, to display the **Browse for Lesson** dialog.

 Search button

The specified date is displayed as part of the browser title.
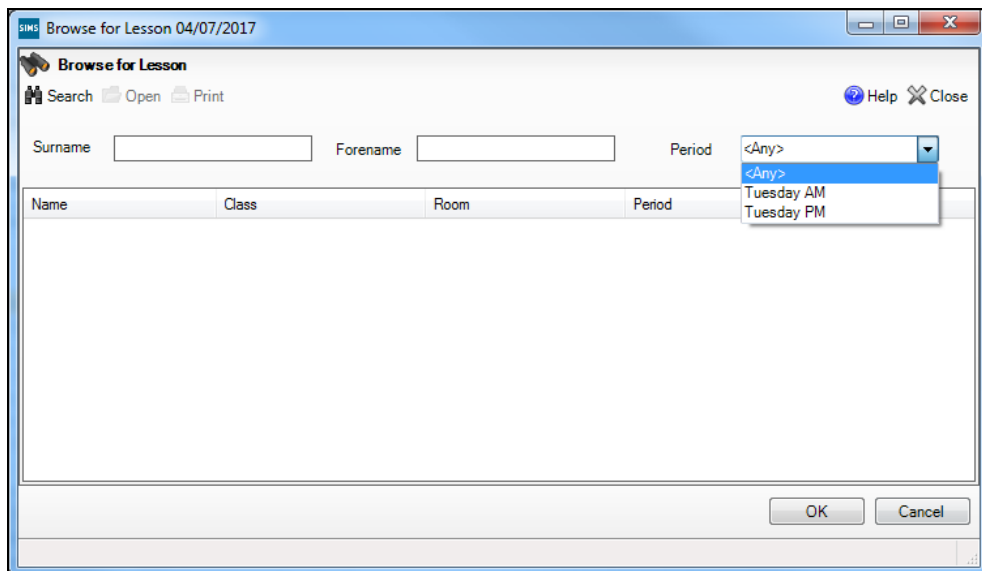
A combination of the **Surname**, **Forename** and **Period** (i.e. AM or PM session for the specified date) can be used to refine the search for the required registration tutor/teacher. Alternatively, these fields can be left blank to display a list of all classes and associated registration tutor/teachers for the date specified.

4. Click the **Search** button to display a list of the registration tutor/teachers who match the search criteria.
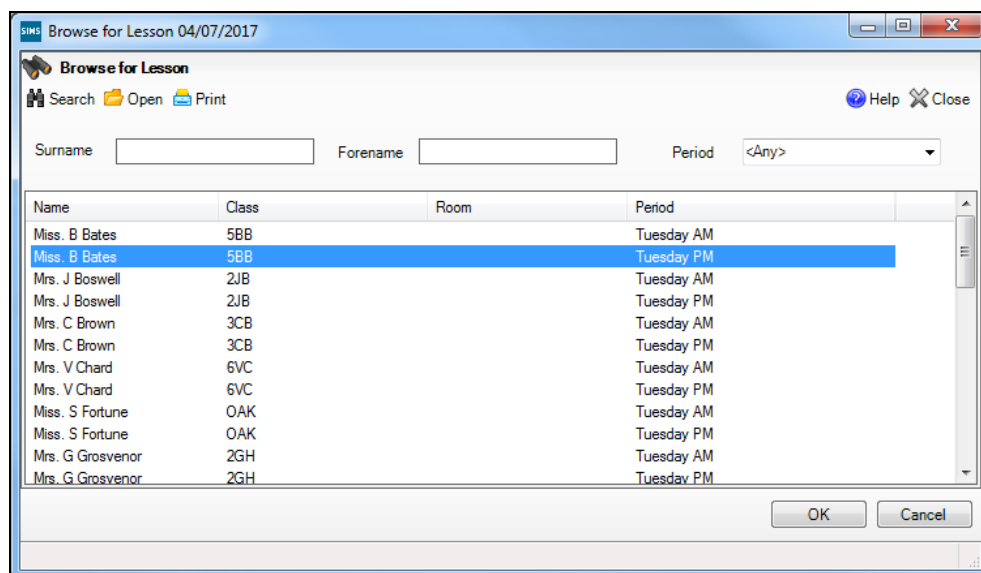
The **Class**, the **Room** in which the registration will be held and the timetable **Period** (day and session) associated with each registration tutor/teacher for the date specified are displayed.

5. Highlight the required registration tutor/teacher then click the **OK** button. Alternatively, double-click their **Name** to display the corresponding register.

Entering Registration Marks

The **Today** view displays the selected registration tutor/teacher's sessions for the current day.

A session is defined as half a school day. It is a statutory requirement that all schools must record session marks for morning and afternoon attendance.

The **Future** and **History** views, which also show the current session, can be displayed by selecting the appropriate radio button. Selecting either of these views enables you to enter marks for the current session.

This section of the handbook deals with the **Today** view. Please see the following sections for information about the **Future** and **History** views (please see *Editing Historical Marks* on page *57* and *Editing Future Marks* on page *57*).

1. Open the required register to display the **Take Register** page (please see *Accessing the Register* on page *24*).

The registration group, registration tutor/teacher and the date are displayed at the top of the **Take Register** page.

By default, the name and the registration group of each pupil/student in the class are displayed. Any existing marks recorded for these pupil/students are displayed on the register.

*NOTES: When taking the register for either session, both the **AM** and **PM** columns are editable. This enables registration tutor/teachers to enter a reason for absence in one column while entering registration marks in the other.*

*Where the school is closed to pupil/students due to a weekend, half-term holiday, training day, etc. the **#** (school closed to pupil/students) code is displayed automatically on the register.*

2. Click the cell in which you wish to enter a mark.

    In the following example, Lorenzo Defeo is about to be given a mark for PM registration.

3. Enter a mark for each pupil/student using one of the following methods:

    - **Entering a mark using the keyboard**

        Enter a mark using the keyboard. As each mark is entered, the highlight on the register automatically moves down to the next pupil/student in the class, ready for their mark to be entered.

        Managing Double Periods:

        If no marks exist for a double period then a present mark (**/**) is entered, both cells representing the double period are populated automatically with the present mark.

/	/	
-	-	
-	-	

        However, if a present mark is changed to an **N** (no reason yet provided for absence), the adjacent cell must be updated manually.

N	/	
/	/	
/	/	

- **Selecting the required code from a list of codes**

  Select the required code from the **Codes** dialog, which lists all codes and their descriptions. The **Codes** dialog is accessed in the following ways:

  - **Right-click** – right-click the register cell in which you wish to enter a mark and select **Display Codes** from the pop-up menu.
  - **Codes Button** – click the **Codes** button to display the **Codes** dialog.
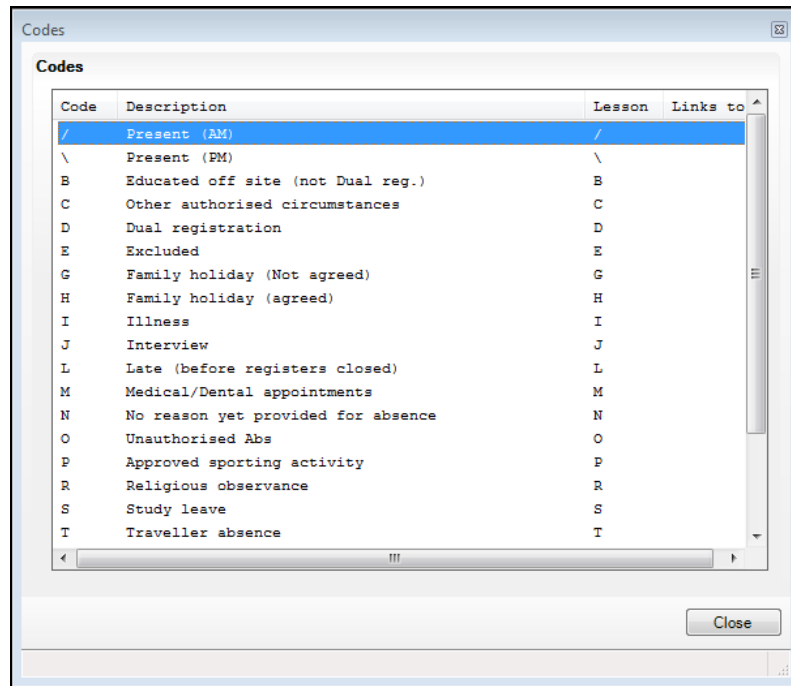
  Double-click the required code to populate the current cell. The highlight on the register moves down to the next pupil/student automatically ready for their mark to be entered. Continue entering marks, for example by repeatedly double-clicking **/ Present (AM)** interspersed with other marks. When all marks have been entered, click the **Close** button to close the **Codes** dialog.

  > *TIP: To enter marks using the keyboard while the **Codes** dialog is displayed, click in the register cell where the next mark is to be entered (this returns the focus to the register) and enter the required mark via the keyboard.*

- **Entering a code using the mouse 'Toggle Marks on Click' functionality**

  > *NOTE: This option is available only if **Toggle marks on click** is selected in the **Visibility Switches** panel of the Attendance Setup (please see* Specifying Visibility Switches *on page* 10*).*

Ensure that the highlight is on the cell in which you wish to enter a mark then click the associated pupil/student's name to toggle the mark between **/** (present), **N** (no reason yet provided for absence) and **–** (no mark recorded).

If double periods are in use, marks are dealt with in the same way as when entering a mark using the keyboard.

- **Entering the same code for several pupil/students in the class**

   a. Click in the first cell in which you wish to enter the mark.

   b. Hold down the **Shift** key and click the last cell in which you wish to enter the same mark. The selected cells are highlighted.

   c. Enter a mark using the keyboard or **Codes** dialog, as described previously.

- **Entering the same code for ALL pupil/students in the class**

   a. Click the column heading for the current session. The cells in the selected column are highlighted.

   b. Enter **/** or **** as appropriate to flood fill the entire column.

   c. Where the present mark (**/** or ****) is not applicable, individual marks can be edited by clicking the appropriate cell then entering the correct mark using the keyboard or **Codes** dialog.

4. If you wish to change marks <u>before</u> saving:

   - Editing a mark <u>before</u> saving: Ensure that the highlight is on the cell displaying the mark you wish to edit then enter the correct code using the keyboard or use the **Codes** dialog as described previously.

   - Deleting a mark <u>before</u> saving: Ensure that the highlight is on the cell displaying the mark you wish to delete then press the **Delete** key. A dash (**-**) is displayed in the cell where a mark has been deleted.

5. Enter all required attendance marks then click the **Save** button.

6. If there are any missing marks when the register is saved, the following message is displayed:

   Students with missing marks will be marked absent. Do you wish to proceed with the save?

   Click the **Yes** button to save the marks. The missing marks are then replaced with code **N** (no reason yet provided for absence). Alternatively, click the **No** button to return to the **Take Register** page where the missing marks can be entered before saving.

   > *TIP: Although both **AM** and **PM** columns are editable, validation applies only to the selected column. Therefore, care should be taken to ensure that the current registration column is selected when the marks are saved. This prevents missing marks in the other column being filled with **N** codes.*

7. If you wish to edit a <u>saved</u> mark, for example where the reason for absence is now known, ensure that the **Preserve/Overwrite** toggle button displays **Overwrite**.
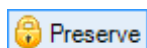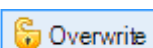
 Preserve/Overwrite toggle button

Edit the mark(s), then click the **Save** button to save the changes.

To ensure that the marks cannot be changed accidentally, click the **Overwrite** button, which then toggles to **Preserve**. You can toggle between **Preserve** and **Overwrite** as required.

8. To print the register, click the **Print** button to display the **Run a Screen Based Report** dialog.

Ensure that the options are correct then click the **OK** button. The register is displayed in your web browser from where it can be printed, if required.

> *TIP: In some circumstances attendance marks might be entered before or after the attendance date. For example, a present mark displayed against a pupil/student for the 6 March might have been recorded on the 20 March.*
>
> *The date and time that an attendance mark was recorded can be investigated by creating a report (via **Report | Design Reports**). Select **Student** as the Data Area, the **Attendance**/**Lesson Monitor** as one of the fields to be included in the report, then select **Recorded On** as a sub-report.*

More Information:
Running a Screen Based Report on page *155*

Illness Recorded by the School Office

Where the school is informed that a pupil/student will not be attending school because they are unwell, the office records a mark of **I** (Illness) via **Focus | Attendance | Edit Marks**. It is possible that the office may also have entered a comment.

When the register is marked, the registration teacher/tutor enters **N** in the register because of the pupil/student's unexplained absence.

Provided that the Edit Marks data has been saved before the register is saved, the **N** mark is overwritten with **I** (Illness) and any additional marks and comments entered by the school office are available to displayed.

IMPORTANT NOTE: A comment entered in the register always overwrites a comment entered in Edit Marks, provided the register is saved <u>after</u> Edit Marks.

Displaying Additional Pupil/Student Identification Columns

This facility is available in all routines where pupil/student names are listed, e.g. **Focus | Attendance | Take Register**, **Edit Marks**, **Deal with Unexplained Absences**, **Deal with Missing Marks**, etc.

It is possible to specify which additional pupil/student identification columns you wish to be displayed in the editing grid, e.g. you might want to identify those pupil/students who have **Medical Conditions** so that any potential risk in class can be recognised.

The following identification columns are available for selection:

- **DOB** (date of birth)
- **Gender**
- **Year**
- **Ad No** (Admission number)
- **SEN** (Special Educational Needs)
- **Behaviour today**
- **G&T** indicator (gifted and talented)
- **Achievement today**
- **Quick Note** indicator (hovering the mouse pointer over the indicator in the **Quick Note** column displays the content of the note)
- **Boarder** status (description only)
- **Medical Condition** indicator
- **PP** (Pupil Premium) indicator
- **Interventions** (hovering the mouse pointer over the number in the **Interventions** column displays the intervention details).

---

*NOTES: The **Name** and registration (**Reg**) columns are always displayed and are therefore not available for selection from the additional identification columns pop-up list.*

More than one additional column can be added to a grid but they must be selected one at a time.

The content of some of these columns is dependent on permissions.

These columns can be added and removed as required while the current routine is in use. When the routine is re-opened or refreshed, only the default columns are displayed.

The columns displayed by default are defined by your Attendance Manager or School Administrator via **Tools | Setups | Attendance Setup | Module Setup**.

1. Right-click one of the identification column headings on the left-hand side of the editing grid, e.g. **Name** or **Reg** (but not a column relating to marks), to display the additional pupil/student identification columns pop-up menu.

2. Click the name of the column you want to add. Your selection is indicated in the pop-up list by a check box icon adjacent to the column name.

    The grid expands automatically to accommodate the additional column.

3. Repeat this process to select other additional columns, if required.

4. An additional column can be hidden by right-clicking a pupil/student identification column heading then clicking the unwanted column name to deselect it from the pop-up list.

    The grid adjusts automatically to the removal of the additional column.

More Information:
Setting up the Defaults for Specific Routines on page *5*
Introduction to the Edit Marks Routine on page *63*
Dealing with Unexplained Absences on page *68*
Dealing with Missing Marks on page *72*

Adding Extra Names to a Register

If a pupil/student's name is not displayed on the selected register because, for example, they are a new arrival at the school, this routine can be used to record their attendance at the current session only.

> **IMPORTANT NOTE:** *Adding extra names to the registration list does not alter the group membership.*
>
> *Pupil/students added to session registers as extra names should be given permanent membership of a registration group via* **Focus | School | Academic Structure**. *For more information, please refer to the Academic Management handbook.*

Designated staff, e.g. office administrators, can ensure that the extra names are dealt with via **Routines | Attendance | View Extra Names**.

1. Open the required register using your preferred method (please see *Accessing the Register* on page *24*).

2. Click the **Extra Names** button located above the register grid to display the **Add Extra Names** browser.

3. Use the options available in the browser to locate the required pupil/student.

4. Highlight the required name and click the **OK** button or double-click the name to return to the **Take Register** page.

    A message informs you that you are about to add the selected pupil/student to the registration group for this session only.

Confirm add student		✕
❓	You are about to add this student to the reg group, for this session only. Are you sure?	
	Yes	No
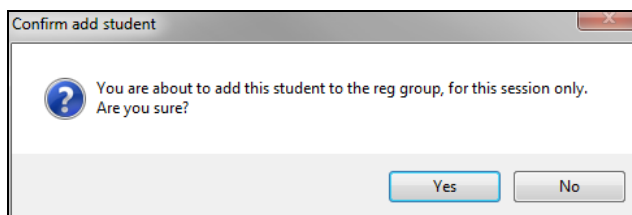
5. To confirm the addition of the pupil/student, click the **Yes** button. The extra name is added to the bottom of the list automatically and the pupil/student is marked as present.

    Take Register 5BB Miss. B Bates 04/07/2017

    Save   Undo   Print   Refresh   Codes   Preserve   Extra Name   Class Photo   Minutes Late   Comments   Links ▾

    Current View   ○ History   ● Today   ○ Future   **Present 28**

Name	Reg	AM	PM
Adams, Laura	5BB	/	–
Amnar, Tarak	5BB	/	–
Astwick, Gwenneth	5BB	/	–
Bond, Steve	5BB	/	–
Carter, Hannah	5BB	/	–
Churchill, Martin	5BB	/	–
Cookson, Harry	5BB	/	–
Cosenza, Isabella	5BB	/	–
Defeo, Lorenzo	5BB	/	–
Dixon, Stephanie	5BB	/	–
Dolittle, Susy	5BB	/	–
Jacob, Tristan	5BB	/	M
Johnson, Hayley	5BB	/	–
Knightley, Kiera	5BB	/	–
Middleton, Lacey	5BB	/	–
Mitchem, Harry	5BB	/	–
Morgan, Paul	5BB	/	–
Morgan, Ryan	5BB	/	–
Morrise, Tianna	5BB	/	–
Mufigno, Sienna	5BB	/	–
Objuwiz, Mesaki	5BB	/	–
O'Connor, Lucy	5BB	/	–
Ostark, Zhivka	5BB	/	–
Ralph, Lauren	5BB	/	–
Richards, Stephen	5BB	/	–
Roberts, Sara	5BB	/	–
Rodgers, Gary	5BB	/	–
Rowe-Jones, Selina	5BB	L	–
Carlin, Tayla	5DT	/	–

6. Repeat this process to add additional names, if required.

7. When the marks are saved, the pupil/student names are sorted into alphabetical order.

    ℹ️ **More Information:**
    Viewing Extra Names Added to Registers on page *109*

Entering Comments Relating to a Pupil/Student

Comments relating to one or more pupil/students can be recorded via the Take Register and Edit Marks routines. For example, where pupil/students have been consistently late or disruptive during the session, this functionality provides the means to record a brief description of the incident (please see *Recording Behaviour Incidents and Achievements via the Register* on page *39*).

Other uses for this functionality include the recording of positive comments, such as `Krystal was enthusiastic today`, and comments about a pupil/student's welfare. The latter might be entered by the School Nurse, to inform the registration tutor of the reason why the pupil/student is not attending registration.

Comments can also be added to future registers regardless of whether an attendance mark has been entered yet, e.g. `Krystal must leave at 2.30pm for a medical appointment`.

1. Open the required register using your preferred method (please see *Accessing the Register* on page *24*).

2. Click in the cell (representing the pupil/student's name and session) where a comment is to be entered. More than one pupil/student can be selected by holding down the **Ctrl** key and clicking in the appropriate cells.

3. Right-click in the last cell selected then select **Enter Comments** from the pop-up menu. Alternatively, click the **Comments** button to display the **Comments** dialog.

The pupil/student's name is displayed in the read-only **Pupil** field.

4. Enter the required comments and click the **OK** button to return to the **Take Register** page. If several pupil/students have been selected, the same comments are recorded against all pupil/students in that group. Where comments have been recorded, a red triangle is displayed in the top right-hand corner of the cell.

❶	A red triangle displayed in the top right-hand corner of a cell indicates that a comment has been entered.
❷	Hovering the cursor over a cell with a red triangle displays the recorded comments and other relevant details.

5. Click the **Save** button to save the information.

> *NOTE: Cells with a cyan coloured background indicate that minutes late have been recorded.*

6. Comments can be edited by displaying the **Comments** dialog again, amending the text and clicking the **OK** button to return to the **Take Register** page. Click the **Save** button again to save your changes.

Hovering over a cell displays the registration tutor's name, registration group, minutes late (if applicable) and comments (if applicable).

More Information:
Introduction to the Edit Marks Routine on page *63*

Recording Behaviour Incidents and Achievements via the Register

A behaviour incident or achievement involving an individual or a group of pupil/students can be recorded via the register. The behaviour incident or achievement is created for the current register date but can be edited later, if required.

There are two methods available for recording behaviour incidents and achievements via the register:

- Method 1 enables you to create a basic record which can then be viewed and edited via **Focus | Behaviour Management**. This is achieved by right-clicking the pupil/student's name on the register.

- Method 2 enables you to create a record and edit the behaviour incident or achievement details by selecting the appropriate option displayed in the **Links** panel or from the **Links** button drop-down list.

A behaviour incident or achievement record can also be created via **Focus | Behaviour Management**.

Additional Resources:

The *Recording Behaviour Incidents* chapter or the *Recording Achievements* chapter of the *Managing Pupil/Students* handbook

More Information:
Entering Comments Relating to a Pupil/Student on page *38*

Creating a Behaviour Incident or Achievement Record via the Register (Method 1)

NOTE: Before this new functionality can be used, the types of achievement or behaviour incident you wish to be available for selection from the register, must be set up via **Tools | Setups | Behaviour Management | Achievement** *(or* **Behaviour***)* **Type** *and must be set to* **Active***.*

For more information, please refer to the Setting Up Behaviour Management *chapter of the* Setting up and Administering SIMS *handbook.*

Additional Resources:

Setting up Behaviour Management chapter of the *Setting up and Administering SIMS* handbook

A behaviour incident or achievement record for one or more pupil/students can be created via the register. Creating a record using the following method takes very little time, allowing the registration tutor/teacher more time to concentrate on the current situation. The newly created record is not displayed from the register but can be viewed and edited later via **Focus | Behaviour Management**.

1. Open the required register using your preferred method (please see *Accessing the Register* on page *24*).

2. Highlight the name of the pupil/student(s) involved in the event. Multiple pupil/students can be selected by holding down the **Ctrl** key and clicking the individual names.

NOTE: Ensure that pupil/students are selected by clicking their names only. Pupil/students cannot be selected by clicking the body of the register where the marks are entered.

3. Right-click the highlighted name then select either **Add Behaviour | <behaviour type> | <behaviour status>** or **Add Achievement | <achievement type>** from the pop-up menu.

Name	Reg	AM	PM
Ballinger, Eden	4C	–	–
Beharry, Joanne			
Bradbury, Lisa			
Bushby, Nigel			
Buxton, Christopher ®	4C	–	–
Carter, Mina	4C	–	–
Collier, Karl	4C	–	–
Davies, David	4C	–	–
Delaney, Ruth	4C	–	–
East, Alison	4C	–	–

Add Behaviour ▶
Add Achievement ▶

Defiance ▶
Disruptive Behaviour ▶
Homework ▶
Inadequate Work in Class ▶
Not equipped for lessons ▶
Verbal Abuse - Pupil ▶
Verbal Abuse - Adult ▶

Unresolved
Resolved
Further Intervention Required
Review in 1 Week
Review in 2 Weeks
Review in 3 Weeks
Review in 6 Weeks

Name	Reg	AM	PM
Ballinger, Eden	4C	–	–
Beharry, Joanne			
Bradbury, Lisa			
Bushby, Nigel			
Buxton, Christopher ®	4C	–	–
Carter, Mina	4C	–	–
Collier, Karl	4C	–	–
Davies, David	4C	–	–
Delaney, Ruth	4C	–	–
East, Alison	4C	–	–

Add Behaviour ▶
Add Achievement ▶

Academic Achievement
Excellent Effort
Extra-curricular Activity
Musical Acitvity
Sporting Representation
Other

A message, similar to the following example, is then displayed confirming that a record of the appropriate type has been created automatically for the selected pupil/student(s).

Achievement Details

A new achievement of type Excellent Effort has been created for :

To edit any details for this achievement, please go to the Achievement screen under the Behaviour Management focus.

OK
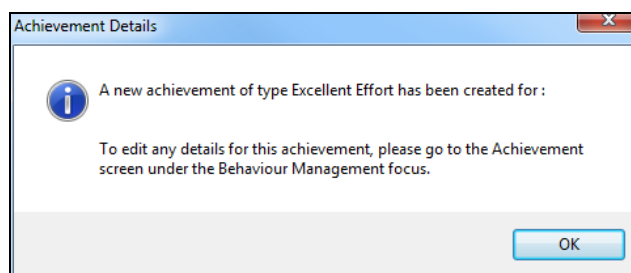
4. Click the **OK** button to return to the register.

The record can be viewed and edited via **Focus | Behaviour Management | Maintain Achievement** (or **Behaviour Incidents**).

Additional Resources:

Recording Behaviour Incidents chapter or the *Recording Achievements* chapter of the *Managing Pupil/Students* handbook

Creating a Behaviour Incident or Achievement Record via the Register (Method 2)

The following method for recording behaviour incidents and achievements creates a record, which is displayed automatically to enable you to edit the details. A record for one or more pupil/students can be created.

1. Open the required register using your preferred method *(please see Accessing the Register on page* 24*).*

2. Highlight the name of the pupil/student(s) involved in the event. Multiple pupil/students can be selected by holding down the **Ctrl** key and clicking the individual names.

> *NOTE: Ensure that pupil/students are selected by clicking their names only. Pupil/students cannot be selected by clicking the body of the register where the marks are entered.*

3. Click the drop-down button adjacent to the **Links** button. If more than one pupil/student has been selected, the **Behaviour**, **Achievement** and **Report Card** links only are active.

> *NOTE: Clicking the body of the **Links** button displays the **Pupil** (or **Student**) **History** page from where an individual's details, e.g. address, medical details, etc. can be viewed. Selecting an **Effective Date** and clicking the **Refresh** button displays the data (in read-only format) as it would have appeared on that date.*

4. Select the **Behaviour** or **Achievement** link, as required.

   The method of recording behaviour and achievement details is similar. The following instructions demonstrate how a behaviour incident is recorded.

   When the **Behaviour** link is selected, the **Behaviour Incident Details** page is displayed.

Several details are already displayed on the **Behaviour Incident Details** page, e.g. the staff involved and pupil/students involved in the event.

> *NOTE: **Detention**, **Report Card** and **Exclusion** buttons are available in the **Student Involved** panel on the **Behaviour Incident Details** page only. For more information about this functionality, please refer to the* Recording Behaviour Incidents *chapter of the* Managing Pupil/Students *handbook.*

5. Enter the information required in the **Details** panel, selecting from the drop-down lists where applicable. The **Type** field must be populated.

Adding Another Member of Staff

1. If you wish to record additional members of staff who were involved in the incident, click the **New** button adjacent to the existing name(s) in the **Other Staff Involved** panel to display the **New Behaviour Staff Link** dialog.
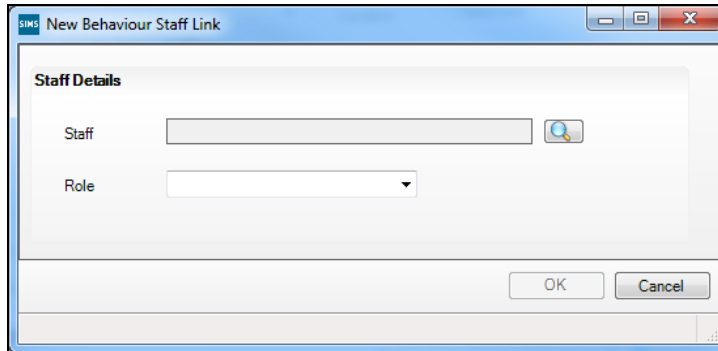
2. Click the **Browser** button to display the **Select person** dialog.

3. Use the search criteria to refine the search then click the **Search** button to display a list of members of staff who match the criteria specified.
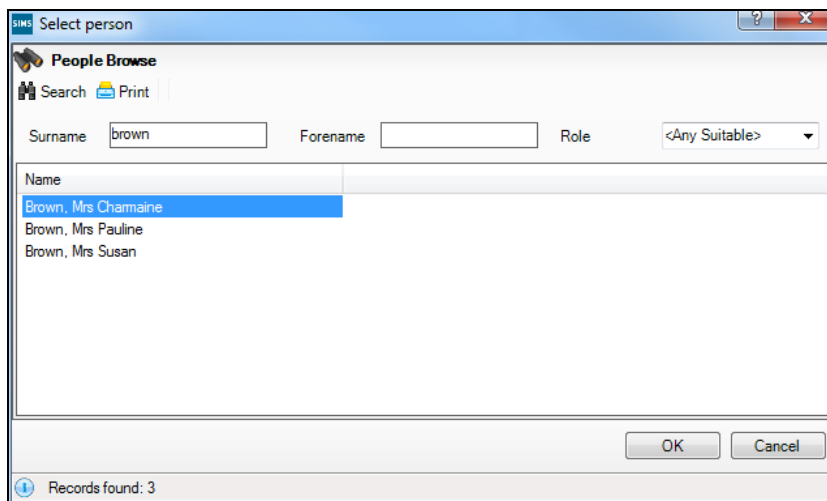
4. Highlight the required member of staff then click the **OK** button to return to the **New Behaviour Staff Link** dialog.
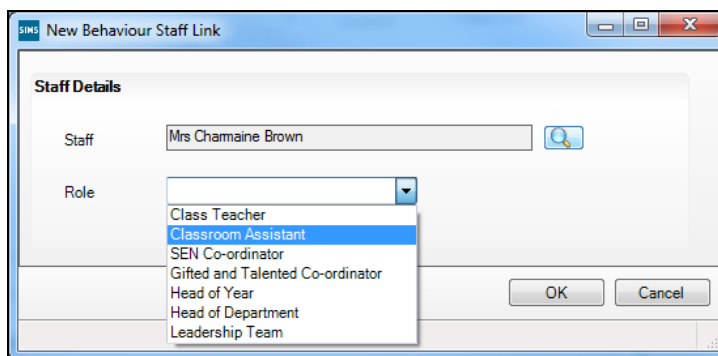
5. Select the school **Role** for the selected member of staff from the drop-down list.

6. Click the **OK** button to return to the **Behaviour Incident Details** page, where the details are displayed in the **Other Staff Involved** panel.

7. Click the **Save** button to save the incident details.

Adding Another Pupil/Student

1. If you wish to add other pupil/student to the list of those involved in the event, click the **New** button in the **Students Involved** panel to display the **Select Students** dialog.

2. Use the search criteria to refine the search then click the **Search** button to display a list of pupil/students who match the search criteria entered.

3. Highlight the required pupil/student(s) then click the **OK** button to display the **Add Students Involved** dialog.
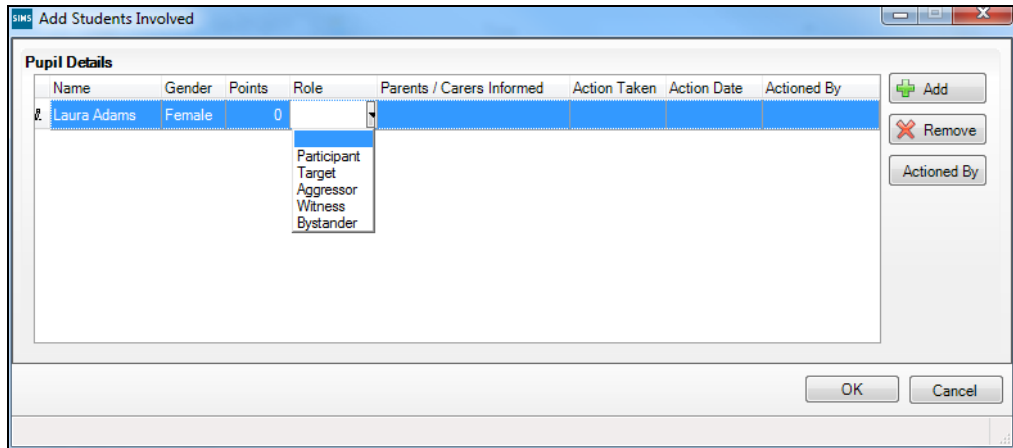
4. Enter the **Points** awarded to the pupil/student(s) then select the additional information from the drop-down lists.

   If you select a **Role** of **Target**, **Witness** or **Bystander** the **Points** should be set to 0 to ensure that this incident does not have an adverse effect on their behaviour record.

5. Click the **OK** button to return to the **Behaviour Incident Details** page. The additional pupil/students are added to the bottom of the **Students Involved** list.

Bulk Editing Pupil/Student Involvement Details

Details about the pupil/students involved in a behaviour incident or achievement can be entered via the register, using the bulk editing routine.

The following details can be recorded:

- the **Points** awarded to the pupil/students
- the **Role** of the pupil/students involved in the incident, i.e. participant, target, aggressor, witness, bystander (behaviour incidents only)
- were the **Parents Informed**, i.e. telephone, email, fax or letter
- the **Action Taken**, e.g. cooling off period, daily report, detention, discussed with pupil/student, fixed period exclusion, etc. (behaviour incidents only)

> *NOTE: If a **Fixed Period Exclusion** is recorded in SIMS, it is automatically displayed on the register as an **E** (exclusion from school).*

- the **Action Date** (behaviour incidents only)
- the **Award Given** to the pupil/student, e.g. commended, certificate, letter to parents or guardian, prize, etc. (achievement only)
- the **Award Date** (achievement only).

The dialogs for recording behaviour and achievement are similar. The following steps provide information about recording behaviour incidents. Achievements can be recorded by selecting the required pupil/students on the register then selecting **Achievement** from the **Links** drop-down list to open the **Achievement Details** page.

To bulk edit a pupil/student's involvement details for a behaviour incident:

1. In the **Students Involved** panel, highlight the required pupil/students.

2. Click the **Open** button to display the **Edit Students Involved** dialog.

3. Select one or more pupil/students then record the required information as follows.

4. Enter the number of **Points** to be awarded to the pupil/student. All incidents recorded against a pupil/student carry a value of 'points'. The lowest point value for each incident is **1**.

5. Specify the role the pupil/student played in the incident by clicking in the appropriate **Role** cell then selecting from the drop-down list (Behaviour Incidents only).

6. Specify how the parents were informed, by clicking in the appropriate **Parents Informed** cell then selecting from the drop-down list.

7. Specify the action taken, by clicking in the appropriate **Action Taken** cell then selecting from the drop-down list.

8. Specify the date that the action was taken. By default, today's date is displayed in the **Action Date** cell when all other details in that record have been entered. To edit the date, click in the appropriate **Action Date** cell and select the required date from the Calendar.

9. Click the **OK** button to return to the **Behaviour Incident Details** page.

More Information:
Editing Staff and Pupil/Student Involvement Details on page *50*

Adding Notes and Documents Relating to the Behaviour Incident

Notes can be recorded and documents attached to a pupil/student's involvement record, if required.

1. In the **Students Involved** panel, highlight the required pupil/student then click the **Open** button to display the **Edit Behaviour Student** dialog.

2. Click the **New** button, adjacent to the **Notes/Documents** panel, to display the **Add Note/Document** dialog.
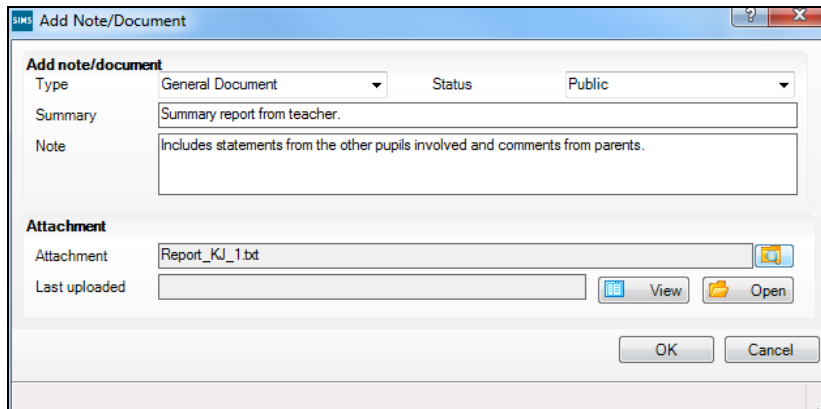
3. Specify the **Type** of document, if applicable, by selecting from the drop-down list.

4. Enter a **Summary** of the document, if applicable.

5. Enter any notes relating to the incident, if applicable.

6. To attach a document, click the **Browse** button.

 Browse button
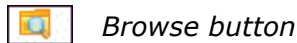
7. Select the document to be attached then click the **OK** button to return to the **Add Note/Document** dialog. The **View** and **Open** buttons are now active.
8. Click the **OK** button on each dialog to return to the **Behaviour Incident Details** dialog.
9. Click the **Save** button to save the incident details.
10. The next time the record is displayed, the details of when the attachment was **Last uploaded** is displayed.

Editing Staff and Pupil/Student Involvement Details

The role of the members of staff involved in the incident, e.g. **Class Teacher**, **Head of Year**, can be edited. The points awarded to the pupil/student and the details about the way in which the parent/guardians have been informed can also be edited. In addition, notes can be recorded or edited and documents attached, if appropriate.

Editing Involvement Details for an Individual Member of Staff

1. The role of the staff member involved in the incident can be amended if necessary.
2. In the **Other Staff Involved** panel, highlight the member of staff's name then click the **Open** button to display the **Edit Behaviour Staff** dialog.
3. Select the correct **Role** from the drop-down list, e.g. **Class Teacher**, **Classroom Assistant**, **Head of Year**, etc.
4. Click the **OK** button to return to the **Behaviour Incident Details** dialog.
5. Click the **Save** button to save the amended details.

Editing Involvement Details for an Individual Pupil/Student

Details of the behaviour incident for individual pupil/students can be edited as follows:

1. In the **Students Involved** panel, highlight the relevant pupil/student then click the **Open** button to display the **Edit Behaviour Student** dialog.

2. If necessary, edit the points allocated to a pupil/student.

3. Select the method in which the parents should be informed, if different to that already stated.

4. If necessary, edit the **Notes** recorded about the incident.

5. To view an attached document, highlight the attachment then click the **Open** button to display the **Edit Note/Document** dialog. The time and date that the document was **Last uploaded** is displayed.

   Click the **View** button to display a read-only version of the document. Alternatively, users with appropriate permissions can open and edit the attached document by clicking the **Open** button. The amended document can be saved with a new file name and location, if required.

6. Click the **OK** button at each dialog to return to the **Behaviour Incident Details** dialog.

7. To add additional documents, click the **New** button to display the **Add Behaviour Student** dialog.

8. Click the **Save** button to save the amended details.

> **More Information:**
> *Bulk Editing Pupil/Student Involvement Details* on page *46*
> *Adding Notes and Documents Relating to the Behaviour Incident* on page *48*

Deleting Staff and Pupil/Student Involvement Details

Individual members of staff and pupil/students can be deleted from the incident record by highlighting their name then clicking the adjacent **Delete** button. Although the deletion is immediate it can be restored by clicking the **Undo** button <u>before</u> saving.

Click the **Save** button to save changes.

Adding Report Card Details via the Register

The majority of report cards are issued by Heads of Year or Pastoral Managers (via **Focus | Behaviour Management | Report Card**) but generally speaking, class teachers are responsible for the administration and completion of report cards, i.e. managing targets and entering brief comments related to the targets.

1. Open the required register using your preferred method (please see *Accessing the Register* on page *24*).

   A pupil/student who is on report is indicated on the register by a ® symbol at the top right-hand side of their name. The symbol and the pupil/student's details, e.g. **Name** and **Reg** group, are displayed in red.

If a report card template has been applied to the report card, the template code is displayed next to the ® symbol.
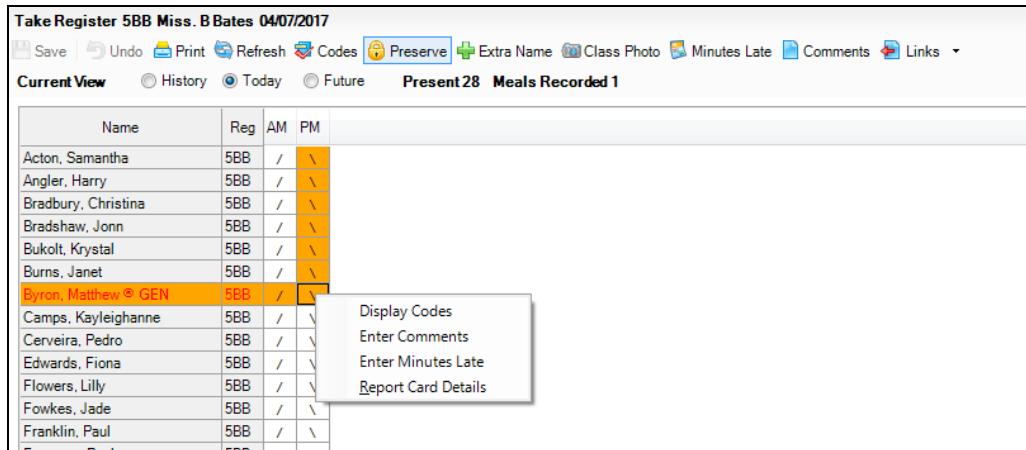
2. Highlight the name of the pupil/student who is on report then right-click one of the register cells associated with the selected pupil/student and select **Report Card Details** from the drop-down list.

> *NOTE: Right-clicking the details displayed in one of the information columns, e.g. **Name**, **Reg**, etc. displays a different drop-down list from where a behaviour incident or achievement record can be created.*

Alternatively, highlight the pupil/student's name then click the drop-down button adjacent to the **Links** button and select **Report Card** from the drop-down list to display the **Report Card Details** dialog.
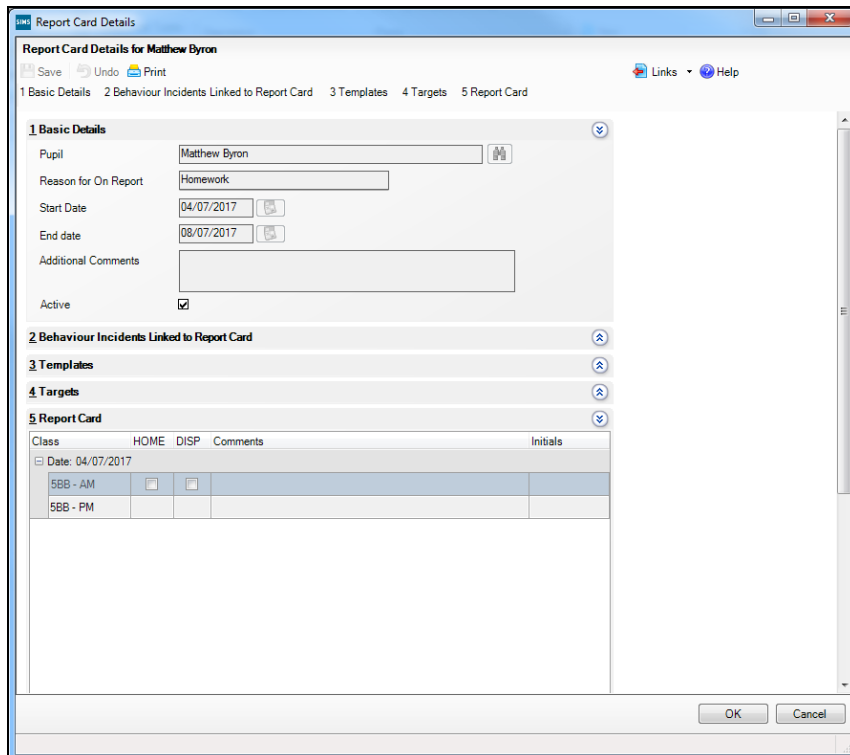
The panels on the **Report Card Details** dialog can be viewed by clicking the associated expand/contract toggle button. The majority of the information displayed is read-only.

- The **Basic Details** panel provides information about the report card, including the pupil/student's name, the reason for the pupil/student being on report and the report start and end dates. If **Additional Comments** were entered when the report card was created, they are also displayed in this panel.

  The **Active** check box is selected indicating that the report card is current. To mark the report card for future use, deselect the check box then click the **Save** button.

- If any behaviour incidents have been inked to this report card they are displayed in the **Behaviour Incidents Linked to Report Card** panel.

- If a report card template has been applied to this report card its **Description** is displayed in the **Templates** panel.

- The **Target** panel displays the target types that were selected when the report card was created.

- The **Report Card** panel enables you to manage the targets that have been set.

The pupil/student's registration group/classes for today are listed on left-hand side of the **Report Card** panel.

3. The code relating to the target type(s) that have been set for the report card are displayed as individual column(s). If the target was achieved, select the applicable target check box adjacent to the current class.

4. **Comments** relating to the target(s) can be entered, if required.

5. Enter the **Initials** of the teacher who entered the details.

6. Click the **Save** button.

7. To print the report card, click the **Print** button to display the **Run a Screen Based Report** dialog then click the **OK** button to return to the **Take Register** page.

Additional Resources:

Creating Report Cards chapter of the *Managing Pupil/Students* handbook

More Information:
Recording Behaviour Incidents and Achievements via the Register on page *39*
Running a Screen Based Report on page *155*

Viewing the Class Photograph

When a register is opened, the class photograph can be viewed, provided that the pupil/student photographs are stored in SIMS.

The class photograph is a composite display, made up of the individual photographs. The pupil/student's name is displayed under the associated photograph.

This option is particularly useful for members of staff who are not familiar with the class members.

1. Open the required register using your preferred method (please see *Accessing the Register* on page *24*).

2. Click the **Class Photo** button to display the **Class Photo** dialog.

All photographs of the pupil/students in the class are displayed (provided they are stored in SIMS).
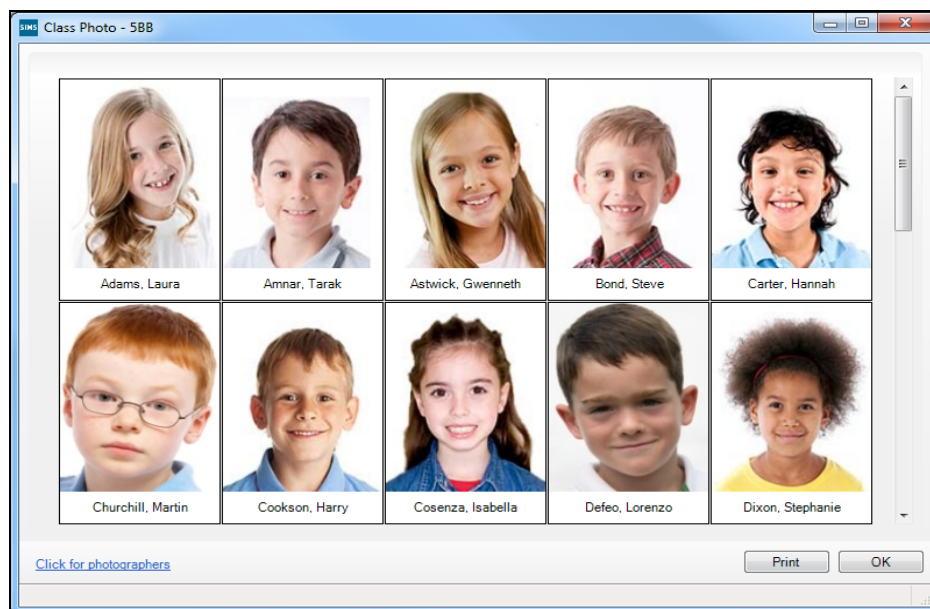
3. If information is required about the SIMS Schools Photography Licensed Partners, click the **Click for photographers** link at the bottom of the dialog to display the **SIMS Schools Photography Licensed Partners** web page.

Viewing an Individual's Photograph

An individual's photograph can be viewed when the register is displayed.

1. Click the required pupil/student's name on the register.
2. Select **Photo** from the **Links** button drop-down list to display the selected pupil/student's photo (providing it is stored in SIMS).

3. To view another pupil/student's photo (while an individual photo is still displayed), click the required **Name**.
4. Click the **Ok** button to close the **Student Photo** dialog.

Recording Minutes Late

The Minutes Late functionality enables you to record the length of time that a pupil/student or group of pupil/students were late arriving for registration.

1. Open the required register using your preferred method (please see *Accessing the Register* on page *24*).
2. Click in the cell that represents the session at which the pupil/student arrived late. More than one pupil/student can be selected by holding down the **Ctrl** key and clicking in the appropriate cells.

3. Right-click in the last cell selected then select **Enter Minutes Late** from the pop-up menu. Alternatively, click the **Minutes Late** button to display the **Minutes Late** dialog.

The pupil/student's name is displayed in the read-only **Pupil** field.

4. Enter the number of minutes that the pupil/student arrived late then click the **OK** button to return to the **Take Register** page. If several pupil/students are selected, the same number of minutes late is recorded against each of them.

Where minutes late have been recorded, the background colour of the cell changes to cyan.

❶	A cell with a cyan background indicates that minutes late have been entered.
❷	Hovering the cursor over a cell with a cyan background displays the recorded minutes late, the registration tutor/teacher's name, registration group/class and comments (if applicable).

5. Click the **Save** button to save the information.

> NOTE: A red triangle displayed in the top right-hand corner of a cell indicates that a comment has been entered.

The number of minutes late can be edited by displaying the **Minutes Late** dialog again, amending the number and clicking the **OK** button to return to the **Take Register** page. Click the **Save** button again to save your changes.

More Information:
Entering Comments Relating to a Pupil/Student on page *38*

Editing Historical Marks

The historical option enables you to view, edit and enter historical marks for up to 10 instances of the selected session.

The historical view can be used to:

- view a pupil/student's pattern of attendance for this registration group
- correct any errors with previous marks (ensure that the **Overwrite** toggle button is displayed)
- enter codes to replace missing marks.

1. Ensure that the required session has been selected from the timeline in the **Select Class** browser.

2. Select the **History** radio button. The AM and PM sessions for each day displayed are shown. The day in which the selected session occurs is displayed on the right-hand side of the grid.

3. To return to the register for the selected session, select the **Today** radio button.

   Alternatively, if you want to view other instances of the selected session that take place in the future, select the **Future** radio button.

Editing Future Marks

The future option enables you to view, enter and edit future marks for up to 10 instances of the selected session. For example, if a family holiday has been approved or a doctor or dental appointment is known, marks can be entered so that staff have visibility of these codes.

1. Ensure that the required lesson or session has been selected from the timeline in the **Select Class** browser.

2. Select the **Future** radio button.

   The AM and PM sessions for each day displayed are shown. The day in which the selected session occurs is displayed on the left-hand side of the grid.

Where the **Future** view is selected <u>before</u> the register is saved, future marks for **Extra Names** added to the current register are not displayed. In the following example, Tayla Carlin was added to the AM and PM registers as an extra name for Tuesday 4 July only. Therefore, future registers for that registration group do not include Tayla and the cells are greyed out.

3. To return to the register for the selected session, select the **Today** radio button.

   Alternatively, if you want to view the previous 10 instances of the selected session, select the **History** radio button.

More Information:
Editing Historical Marks on page *57*

Linking to Other Areas of SIMS

Several links, in the form of tabs, provide quick access from the **Take Register** page to other areas in SIMS.

Primary school example:

Secondary school example:

The following sections provide information about the tabs that are available from the register.

Marksheet

Clicking the marksheet tab (e.g. **Art : 9y/Art1**) displays up to five marksheets associated with the group of selected pupil/students.

Additional Resources:

Administering Assessment handbook

Specifying the Marksheets to Display

1. Right-click any tab then select **Configure** to display the **Configuration** dialog.

    All available marksheets for the selected group of pupil/students are displayed in the first panel. By default the first five in the list are selected.

2. Select/deselect the check box adjacent to the marksheet(s) to be displayed. Up to five marksheets can be selected.
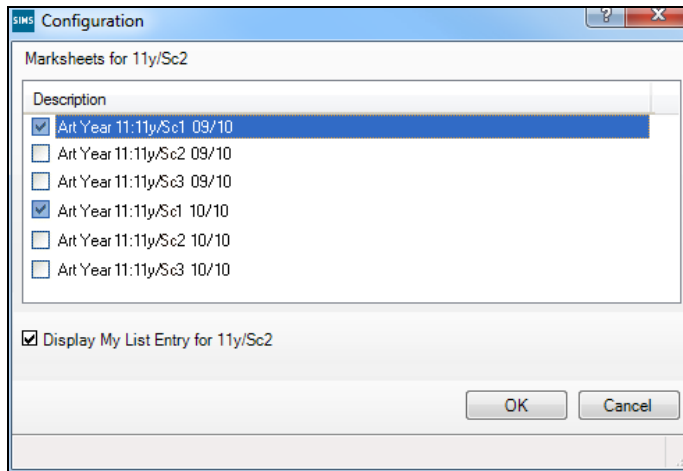
3. Click the **OK** button to return to the **Take Register** page.

My List Entry

Clicking the **My List Entry** tab enables comments for the pupil/student's end of year reports to be entered via the **Profiles List Entry Detail** page.

Additional Resources:

Managing Pupil/Student Profiles handbook.

Hiding the My List Entry tab

1. Right-click on any tab, then select **Configure** to display the **Configuration** dialog.

2. Deselect the **Display My List Entry for <selected group>** check box.
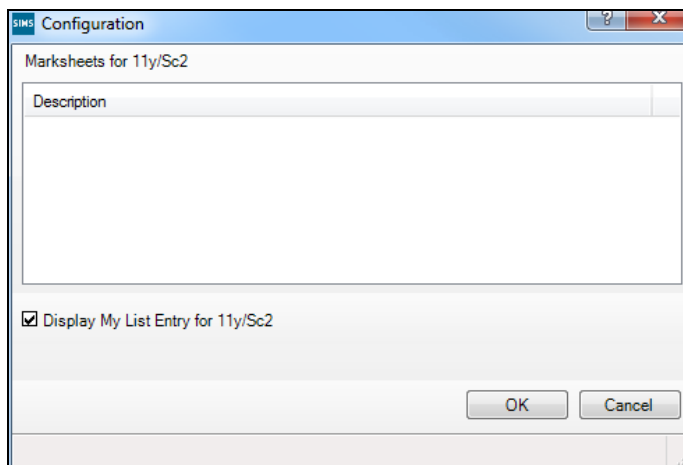
3. Click the **OK** button to return to the **Take Register** page.

   The tabs located directly above the register include:

   ▪ **Take Register**

   If one of the other tab areas is being viewed, e.g. **My List Entry**, clicking the **Take Register** tab returns you to the **Take Register** page.

   ▪ **Attendance**

   Applicable to Dinner Money users only

   If the Dinner Money licence is applied, **Attendance** and **Dinner Register** tabs are displayed above the register. If the dinner register is displayed, clicking the **Attendance** tab returns you to the current session/lesson register.

   ▪ **Dinner Register**

   Applicable to Dinner Money users only

   If the Dinner Money licence is applied, **Attendance** and **Dinner Register** tabs are displayed above the register. Clicking the **Dinner Register** tab displays the dinner register for the current registration group/class. For more information about the options available to Dinner Money users, please refer to the *Administering Dinner Money* handbook.

04| **Edit Marks Routine**

Introduction to the Edit Marks Routine

The Edit Marks routine can be used to enter and edit any session mark where the pupil/student should attend school. For example, incorrect marks can be edited and reasons for absence can be entered. Some schools may choose to use the Edit Marks routine to enter a registration group's marks for the whole week.

Marks can be entered for future dates, e.g. where the date of a hospital appointment is known. Marks for weeks prior to the selected date can also be edited.

To ensure that the data displayed is up-to-date, a **Refresh** button is available. This option can be used when data is entered by multiple users or when biometric devices, swipe cards or other external systems are in use.

Additional pupil/student identification columns can be added to provide further information about the pupil/students whose marks you are editing, e.g. date of birth, gender, etc.

More Information:
Displaying Additional Pupil/Student Identification Columns on page *34*
Setting up the Defaults for Specific Routines on page *5*

Selecting Pupil/Students for the Edit Marks Routine

1. Select **Focus | Attendance | Edit Marks** to display the **Edit Marks** browser.

2. The date at the beginning of the current week is displayed by default. If a different week is required, enter the required **Week Beginning** date or click the adjacent **Calendar** button and select the required date.

3. By default, the **Group Type** is displayed as **Reg Group**. If a different **Group Type** is required, select the group from the drop-down list then click the **Search** button to refresh the display.

4. To **Include accepted applicants** in the list of pupil/students available for selection, select the associated check box then click the **Search** button to refresh the display.

5. If you intend to select more than one group from the browser, e.g. **Elm**, **Pine** and **Oak**, as displayed in the following graphic, the **Treat as one group** check box can be selected.
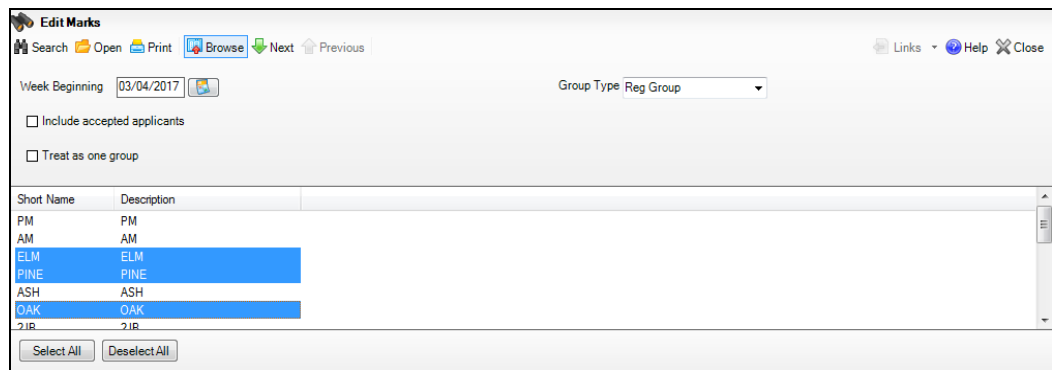
This enables a list of all pupil/students from the selected groups to be displayed in one list.

If the **Treat as one group** check box is <u>not</u> selected, the groups are processed then displayed sequentially. For example, pupil/students in the **Elm** group are displayed then after editing and saving the marks, the **Pine** group is displayed then the **Oak** group.

Name	Reg	Mon 03/04 AM	PM	Tue 04/04 AM	PM	Wed 05/04 AM	PM	Thu 06/04 AM	PM	Fri 07/04 AM	PM
Adams, Laura	ELM	/	\	/	\	/	\	/	\	/	\
Akeman, Rebecca	ELM	/	\	/	\	/	\	/	\	/	\
Amnar, Tarak	ELM	/	\	/	\	/	\	N	N	/	\
Astoni, Sonya	ELM	/	\	/	\	/	\	/	\	/	\
Astwick, Gwenneth	ELM	/	\	/	\	L	\	/	\	/	\
Astwick, William	ELM	/	\	/	\	L	\	/	\	/	\
Baker, Fiona	ELM	/	\	/	\	/	\	/	\	/	\
Barrett, Anthony	ELM	/	\	/	\	/	\	/	\	/	\
Benson, Zachary	ELM	/	\	/	\	/	\	/	\	/	\
Bond, Steve	ELM	/	\	/	\	/	\	/	\	/	\
Carter, Hannah	ELM	/	\	/	\	/	\	/	\	/	\
Churchill, Martin	ELM	/	\	/	\	/	\	/	\	/	\
Cookson, Harry	ELM	/	\	/	\	/	\	/	\	/	\

6. Double-click the required group or highlight the group and click the **Open** button to display the **Edit Session Marks** page.

   To select more than one group, hold down the **Ctrl** key and click the required groups to highlight them. The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the browser) can also be used, if required.

Editing Marks for Selected Pupil/Students

The following example shows session marks for three registration groups where **Treat as one group** has been selected.

TIP: To view information relating to a mark, hover the cursor over the applicable cell.

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1. To print the information displayed on the **Edit Session Marks** page, click the **Print** button. A printed copy of the information might be helpful if other members of staff need to be consulted. The print option can be run at any time during the routine.

2. If you wish to edit existing marks, ensure that the **Overwrite** button is displayed. Click the **Preserve**/**Overwrite** button to toggle to **Overwrite**.

    Preserve/Overwrite toggle button

   By default, **Preserve** is displayed on the **Preserve**/**Overwrite** button. This ensures that existing marks are protected.

3. Select the direction in which you wish marks to be entered. Click the **Vertical**/**Horizontal** button to toggle between **Vertical** and **Horizontal**, as required.

    Vertical/Horizontal toggle button

   The **Vertical** button is displayed by default. When marks are entered, the highlight automatically moves down to the next cell in the grid ready for the next entry.

   To enter marks across the grid, ensure that the **Horizontal** button is displayed. When marks are entered the highlight automatically moves horizontally to the next cell in the grid ready for the next entry.

4. Ensure that the **Overwrite** button is selected then edit the marks as required.

   - A block of cells can be edited by dragging and dropping using the cursor. This feature does not permit scrolling, therefore only the cells visible on screen can be selected.

   - To select all cells, click the **Select All** button then enter the required code. All cells are populated with the same code. Individual cells can then be edited, if required.

   If an invalid mark is entered, the **Codes** dialog opens displaying a list of valid codes. Double-click the correct code to populate the highlighted cell. To close the **Codes** dialog, click the **Close** button. The **Codes** dialog can also be accessed at any time by clicking the **Codes** button.

5. To record the number of minutes a pupil/student was late attending registration, highlight the appropriate cell then click the **Minutes Late** button. Enter the number of minutes late then click the **OK** button to return to the **Edit Session Marks** page.

6. To enter comments, highlight the appropriate cell then click the **Comments** button. Enter the required comment then click the **OK** button to return to the **Edit Session Marks** page.

7. Click the **Save** button to save the changes.

8. Previous and future weeks can be viewed and edited by clicking the **Previous Week** button or **Next Week** button. A list of pupil/students who match the criteria specified and any existing marks for that week are displayed.

9. The **Previous** and **Next** buttons (located in the browser above the **Edit Session Marks** page) can be used to display the next or previous group, without returning to the **Find Student** browser.

    *NOTE: If one group only is selected, the **Previous** and **Next** buttons are greyed out.*

More Information:
Entering Registration Marks on page *27*
Entering Comments Relating to a Pupil/Student on page *38*
Recording Minutes Late on page *55*

First Day Calling

Visibility of first day absences enables the school to contact the parent or carer to find out why the pupil/student has not arrived at school. This is the first step to establishing that the pupil/student is safe.

To assist schools that use the 'First Day Calling' process, an option to **Show only students with Unexpected Absences today** is available on the **Edit Session Marks** page.

Select the **Show only students with Unexpected Absences today** check box to refresh the display.

Deselect this check box to return to display all pupil/student who match the criteria specified in the **Edit Marks** browser.

Entering Reasons for Absence

When reasons for absence are being recorded, e.g. first thing in the morning, schools are recommended to enter session marks using the Edit Marks routine.

1. Select **Focus | Attendance | Edit Marks** to display the **Edit Marks** browser.

2. By default, the **Group Type** is displayed as **Reg Group**. If required, select a different **Group Type** from the drop-down list and click the **Search** button to refresh the display.

    *TIP: Selecting **Whole School** could take some time to load and save. If this is the case, change the **Group Type** to **Individual Student** and click the **Search** button.*

3. To locate an individual pupil/student's name, click in the list of names and type their surname (or the first few letters of their surname).

4. Double-click the located name to display the **Edit Session Marks** page.

    The present week and the previous four weeks are displayed. This enables the recent history of marks to be viewed and any previous reasons for absence to be entered.

5. Click the **Save** button.

6. Click the **Browse** button to return to the **Edit Marks** browser and repeat the process for another pupil/student, if necessary.

Dealing with Unexplained Absences

It is a statutory requirement that unauthorised absences are recorded on the attendance register, unless a satisfactory explanation is provided.

The Deal with Unexplained Absences routine is used to search pupil/student records for unexplained absence. The search can be refined by specifying a date range and group type, e.g. **Year Group**, **Reg Group**, **House**, etc.

If the school has either given approval in advance for the pupil/student to be away, e.g. family holiday, or an explanation for the absence has been offered and accepted, e.g. a doctor's appointment, the absences can be recorded using one of the authorised absence codes. These codes can be entered via the Edit Marks or Entering a Code over a Date Range routines, as appropriate.

More Information:
Introduction to the Edit Marks Routine on page *63*
Entering a Code over a Date Range on page *74*

Selecting Pupil/Students with Unexplained Absences

1. Select **Focus | Attendance | Deal with Unexplained Absences** to display the **Deal with Unexplained Absences** browser.

2. A default date range of 'from one month ago to yesterday' is displayed. If a different date range is required enter the appropriate dates in the **From** and **to** fields or click the associated **Calendar** buttons and select the required dates.

   Calendar button

3. **Year Group** is displayed by default. If a different **Group Type** is required, select the group from the drop-down list, then click the **Search** button to refresh the display.

4. If you intend to select more than one group, e.g. year group 1, 2, and 3, from the browser list, the **Treat as one group** check box can be selected.

   This enables a list of all pupil/students with unexplained absences, from the selected groups, to be displayed in one list.

   If the **Treat as one group** check box is not selected, the groups are processed sequentially. For example, a list of unexplained absences for group 1 is displayed then after editing and saving the marks, group 2 is displayed then group 3.

5. To select one of the groups listed in the **Deal with Unexplained Absences** browser, double-click the group. Alternatively, click the group to highlight it then click the **Open** button. The **Unexplained Absences** page is displayed, showing details of unexplained absences that match the criteria specified.

To select more than one group, hold down the **Ctrl** key and click the required groups to highlight them. The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the browser) can also be used, if required.

Editing Unexplained Absence Marks

All pupil/students who have unexplained absences in the date range specified are displayed.

Continuous absence is displayed on one line, e.g. **From** 22/02/2017 AM **To** 23/02/2017 PM.

All unexplained absences for the same pupil/student are displayed together in the grid.

Kienan, Henry	ELM	02/02/2017 AM	02/02/2017 PM	N
		08/02/2017 AM	08/02/2017 PM	N
		10/02/2017 AM	10/02/2017 PM	N
		22/02/2017 AM	23/02/2017 AM	N
		01/03/2017 AM	01/03/2017 PM	N

The following example shows unexplained session absences for Year Group 1 during the period 02/02/2017 to 01/03/2017.

Unexplained Absences - Year 1

Save Undo Print Codes Links ▾

Unexplained Absences (02/02/2017 - 01/03/2017)

Name	Reg	From	To	Mark
Akeman, Richard	ELM	02/02/2017 AM	02/02/2017 PM	N
		10/02/2017 AM	10/02/2017 PM	N
		22/02/2017 PM	22/02/2017 PM	N
Akeman, Steven	ELM	02/02/2017 AM	02/02/2017 PM	N
		10/02/2017 AM	10/02/2017 PM	N
		22/02/2017 AM	22/02/2017 PM	N
Balik, Karolina	ASH	08/02/2017 AM	08/02/2017 PM	N
		22/02/2017 AM	23/02/2017 PM	N
		28/02/2017 PM	28/02/2017 PM	N
Kienan, Henry	ELM	02/02/2017 AM	02/02/2017 PM	N
		08/02/2017 AM	08/02/2017 PM	N
		10/02/2017 AM	10/02/2017 PM	N
		22/02/2017 AM	23/02/2017 AM	N
		01/03/2017 AM	01/03/2017 PM	N
Odeh, Yazen	ASH	08/02/2017 AM	08/02/2017 PM	N
		10/02/2017 AM	10/02/2017 PM	N
		22/02/2017 AM	23/02/2017 PM	N
		01/03/2017 AM	01/03/2017 AM	N
Pryor, Adam	PINE	08/02/2017 AM	08/02/2017 PM	N
		22/02/2017 AM	23/02/2017 PM	N
Zafar, Enisa	OAK	02/02/2017 AM	02/02/2017 PM	N
		10/02/2017 AM	10/02/2017 PM	N
		22/02/2017 AM	23/02/2017 PM	N

1. To add a pupil/student identification column, right-click an existing identification column heading then select the required column name from the pop-up menu. More than one column can be added but they must be selected one at a time (please see *Displaying Additional Pupil/Student Identification Columns* on page *34*).

2. Produce a report based on the information displayed on the **Unexplained Absences** page (optional). This is achieved by clicking the **Print** button to display the **Run a Screen Based Report** dialog, then selecting the required options. Click the **OK** button to display the report in your web browser from where it can be printed, if required.

   A printed copy of the information might be helpful at this stage, if other members of staff need to be consulted. However, the print option can be run at any time during the routine.

3. Enter an absence code for each resolved unexplained absence in the list.

   Where a mark is entered for a period of continuous absence, the reason for absence is applied to every session in the date range for that continuous absence. For example, Richard Akeman did not attend school from 02/02/2017 AM to 03/02/2017 PM because he was ill on those days. Therefore, code **I** should be entered in the **Marks** column adjacent to those dates. The highlight then moves down to the next unexplained absence.

Name	Reg	From	To	Mark
Akeman, Richard	ELM	02/02/2017 AM	03/02/2017 PM	I
		10/02/2017 AM	10/02/2017 PM	M
		22/02/2017 PM	22/02/2017 PM	I
Akeman, Steven	ELM	02/02/2017 AM	02/02/2017 PM	I
		10/02/2017 AM	10/02/2017 PM	N
		22/02/2017 AM	22/02/2017 PM	N
Balik, Karolina	ASH	08/02/2017 AM	08/02/2017 PM	N
		22/02/2017 AM	23/02/2017 PM	N
		28/02/2017 AM	28/02/2017 PM	N

   If a period of continuous absence consists of more than one reasons for absence, e.g. if Tuesday to Thursday was due to illness and Friday was unapproved family holiday, double-click the pupil/student's name to display the **Edit Marks** dialog, where marks for individual sessions can be entered. The **Edit Marks** dialog provides detailed editing of unexplained absence marks enabling you to edit <u>any</u> mark for the selected pupil/student in the specified date range.

   If an invalid mark is entered, the **Codes** dialog is displayed from which you can select a valid code. Double-click the correct code to populate the highlighted cell in the **Mark** column. To close the **Codes** dialog, click the **Close** button. The **Codes** dialog can also be accessed by clicking the **Codes** button.

4. Click the **Save** button to save the changes and refresh the display. Only pupil/students who still have unexplained absences will be displayed after the refresh process.

   More Information:
   Setting up the Defaults for Specific Routines on page *5*
   Entering Registration Marks on page *27*
   Displaying Additional Pupil/Student Identification Columns on page *34*
   Running a Screen Based Report on page *155*

Detailed Editing of Unexplained Absence Marks

Double-clicking any pupil/student's name on the **Unexplained Absences** page (**Focus | Attendance | Deal with Unexplained Absences**) displays the **Edit Marks** dialog.

The **Edit Marks** dialog displays all marks for the selected pupil/student in the specified date range. It is possible to edit and save any of these marks but you must return to the **Unexplained Absences** page to complete the Deal with Unexplained Absences process.

The following example shows session marks, including unexplained absences, for Yazen Odeh during the specified date range. The **Overwrite** marks and **Horizontal** entry options have been selected.

1. With the **Unexplained Absences** page displayed (**Focus | Pupil** (or **Student**) **| Deal with Unexplained Absences**), double-click the required pupil/student's name to display the **Edit Marks** dialog.

2. To edit existing marks, ensure that the **Overwrite** button is displayed. Click the **Preserve**/**Overwrite** button to toggle to **Overwrite**.

 Preserve/Overwrite toggle button

By default, **Preserve** is displayed on the **Preserve**/**Overwrite** button. This ensures that existing marks are protected.

3. To enter marks across the grid ensure that the **Horizontal** button is displayed. Click the **Vertical**/**Horizontal** button to toggle to **Horizontal**. When marks are entered, the highlight moves horizontally to the next cell in the grid ready for the next entry.

 Vertical/Horizontal toggle button

The **Vertical** button is displayed by default.

4. To run a report based on the information displayed on the **Edit Marks** dialog, click the **Print** button. The print option can be run at any time during the routine.

5. Ensure that the **Overwrite** button is selected then enter a code for each resolved unexplained absence.

   ▪ To select more than one cell in the editing grid, hold down the **Ctrl** key and click the required cells to highlight them.

   ▪ To select a block of cells, click in the first cell hold down the **Shift** key then click in the last cell to highlight the block.

If an invalid mark is entered, the **Codes** dialog opens displaying a list of valid codes. Double-click the correct code to populate the highlighted cell in the **Mark** column. To close the **Codes** dialog, click the **Close** button. The **Codes** dialog can also be accessed by clicking the **Codes** button.

6. To record the number of minutes a pupil/student was late attending registration, highlight the appropriate cell then click the **Minutes Late** button. Enter the number of minutes late then click the **OK** button to return to the **Edit Marks** dialog.

7. To enter comments, highlight the appropriate cell then click the **Comments** button. Enter the required comment then click the **OK** button to return to the **Edit Marks** dialog.

8. Click the **Save** button to save the changes.

9. Click the **Close** button to return to the **Unexplained Absences** page. Only pupil/students who still have unexplained absences are displayed.

More Information:
Entering Registration Marks on page *27*
Entering Comments Relating to a Pupil/Student on page *38*
Recording Minutes Late on page *55*

Dealing with Missing Marks

The Deal with Missing Marks routine enables users to locate and deal with missing session marks between specified dates. Appropriate attendance codes can be entered for individuals or as a batch entry.

Missing marks are rare but will occur if a mark is not entered on the register or in extreme cases where a whole register was not marked for some reason.

Definition of Missing Marks

Missing Marks for sessions are sessions for which the pupil/student has no mark, and for which they were expected to attend, i.e. the school was open for registration and this pupil/student was on-roll.

Selecting Pupil/Students with Missing Marks

1. Select **Focus | Attendance | Deal with Missing Marks** to display the **Deal with Missing Marks** browser.

2. A default date range of 'from one month ago to yesterday' is displayed. If a different date range is required enter the appropriate dates in the **From** and **to** fields or click the associated **Calendar** buttons and select the required dates.

3. **Year Group** is displayed by default. If a different **Group Type** is required, select the group from the drop-down list, then click the **Search** button to refresh the display.

4. If you intend to select more than one group, e.g. year group 1, 2, and 3, from the browser list, the **Treat as one group** check box can be selected, if required.

   This enables a list of all pupil/students with unexplained absences, from the selected groups, to be displayed in one list.

   If the **Treat as one group** check box is <u>not</u> selected, the groups are processed sequentially. For example, a list of unexplained absences for group 1 is displayed then after editing and saving the marks, group 2 is displayed then group 3.

5. To select one of the groups listed in the **Deal with Missing Marks** browser, double-click the group. Alternatively, click the group to highlight it then click the **Open** button. The **Missing Marks** page is displayed, showing details of missing marks that match the criteria specified.

   To select more than one group, hold down the **Ctrl** key and click the required groups to highlight them. The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the browser) can also be used, if required.

Editing Missing Marks

The display on the **Missing Marks** page varies depending on the criteria specified on the **Deal with Missing Marks** browser.

The following example shows a list of missing session marks during the specified date range. The page title includes the selected groups, e.g. Year 2.

*NOTE: The **Save** button can be clicked at any time during the Deal with Missing Marks routine to save the changes and refresh the display. Only pupil/students who still have missing marks are displayed after the refresh process. The remaining missing marks can then be edited.*

1. Enter a mark to replace each dash (-) representing a missing mark.

   Missing marks are ordered by name, date and period. To display missing marks for the same period or the same teacher together, click the **Date** or **Teacher** column heading. The same mark can then be entered as a block by clicking in the first cell of the block, then using the **Shift** key in conjunction with the mouse button click in the last cell of the block and then enter the appropriate mark.

   Alternatively, if a pupil/student has several missing marks for the same reason, hold down the **Ctrl** key and click the required cells to highlight them. Enter the required mark.

   If an invalid mark is entered, the **Codes** dialog is displayed displaying a list of valid codes. Double-click the correct code to populate the highlighted cell in the **Mark** column. To close the **Codes** dialog, click the **Close** button. The **Codes** dialog can also be accessed by clicking the **Codes** button.

2. To run a report based on the information displayed on the **Missing Marks** page, click the **Print** button. The print option can be run at any time during the routine.

3. To record the number of minutes a pupil/student was late attending registration, highlight the appropriate cell then click the **Minutes Late** button. Enter the number of minutes late then click the **OK** button to return to the **Missing Marks** dialog.

4. Comments can be entered (before saving) by highlighting the appropriate cell then clicking the **Comments** button. Enter the required comment then click the **OK** button to return to the **Missing Marks** dialog.

5. To add a pupil/student identification column, right-click a pupil/student identification column heading then select the required column name from the pop-up menu. More than one additional column can be added but they must be selected one at a time.

6. Click the **Save** button to save the changes and refresh the display. Only pupil/students who still have missing marks are displayed after the refreshing the display.

7. Repeat the process until all missing marks have been dealt with.

More Information:
Setting up the Defaults for Specific Routines on page *5*
Entering Registration Marks on page *27*
Displaying Additional Pupil/Student Identification Columns on page *34*
Entering Comments Relating to a Pupil/Student on page *38*
Recording Minutes Late on page *55*

Entering a Code over a Date Range

The same absence code can be entered for a group of pupil/students over the same date range. This process could be used, for example, to record work experience, study leave or field trips.

The Enter a Code over a Date Range routine is normally used to record dates for a future date range. However, the date range functionality is flexible allowing future and past dates to be entered.

> *NOTE: Marks are not updated for pupil/students who have been added to a register.*

1. Select **Focus | Attendance | Enter a Code over a Date Range** to display the **Enter a Code over a Date Range** browser.

2. A default date range of 'from today to today' is displayed. If a different date range is required, enter the appropriate dates in the **From** and **to** fields or click the associated **Calendar** buttons and select the required dates.

       Calendar button

3. **Year Group** is displayed by default. If a different **Group Type** is required, select the group from the drop-down list, then click the **Search** button to refresh the display.

4. Select the group or groups to which the code is to be applied. Click to highlight a single group.

    To select more than one group, hold down the **Ctrl** key and click the required groups to highlight them. The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the browser) can also be used, if required.

5. To allow existing marks to be overwritten, click the **Preserve** button to display the **Overwrite** button.

 Preserve/Overwrite toggle button

The **Preserve** button is displayed by default. This ensures that existing marks are protected.

6. Select the required code from the **Mark Code** drop-down list.

7. Click the **Apply** button to display the **Activity Log**, which shows a summary of the data entered.

8. Click the **Yes** button to apply the selected code to the highlighted pupil/students or groups, or the **No** button to return to the **Enter Code Over Date Range** page, where new parameters can be selected.

Entering a Weekly Pattern of Marks

A weekly pattern of marks can be entered for sessions over a specified date range. This routine is normally used in advance to indicate, for example, when a pupil/student or group is going to be absent or educated off-site on a regular basis.

> *NOTE: Marks are not updated for pupil/students who have been added to a register.*

1. Select **Focus | Attendance | Enter Weekly Pattern** to display the **Enter weekly pattern** page.

2. By default, the week beginning date of the current week is displayed in both the **From w/b** and **to w/b** fields. To specify a different date range (i.e. from a week beginning date to a week beginning date), enter the required dates in the **From w/b** and **to w/b** fields or click the associated **Calendar** buttons and select the required dates.

   NOTE: If a change of timetable model or a change in the pattern of sessions occurs during the date range specified, the weekly pattern is <u>not</u> applied. This is also relevant if a date range that spans two different years is selected. In these circumstances, deal with each part of the date range separately.

3. **Year Group** is displayed by default. If a different **Group Type** is required, select the group from the drop-down list, then click the **Search** button to refresh the display.

4. To overwrite existing marks, ensure that the **Overwrite** button is displayed. Click the **Preserve**/**Overwrite** button to toggle to **Overwrite**.
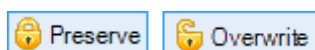
      Preserve/Overwrite toggle button

   The **Preserve** button is displayed by default. This ensures that existing marks are protected.

5. Select the required pupil/students or groups.

   - To select more than one group, hold down the **Ctrl** key and click the required groups to highlight them.
   - To select a block, click in the first group, hold down the **Shift** key then click in the last group to highlight the block.
   - To select all pupil/students or groups, click the **Select All** button.

6. Enter the appropriate marks in the grid at the bottom of the **Enter weekly pattern** page.

   If an incorrect mark is entered the **Codes** dialog is displayed. The **Codes** dialog, which can also be opened by clicking the **Codes** button, lists all available codes and their descriptions.
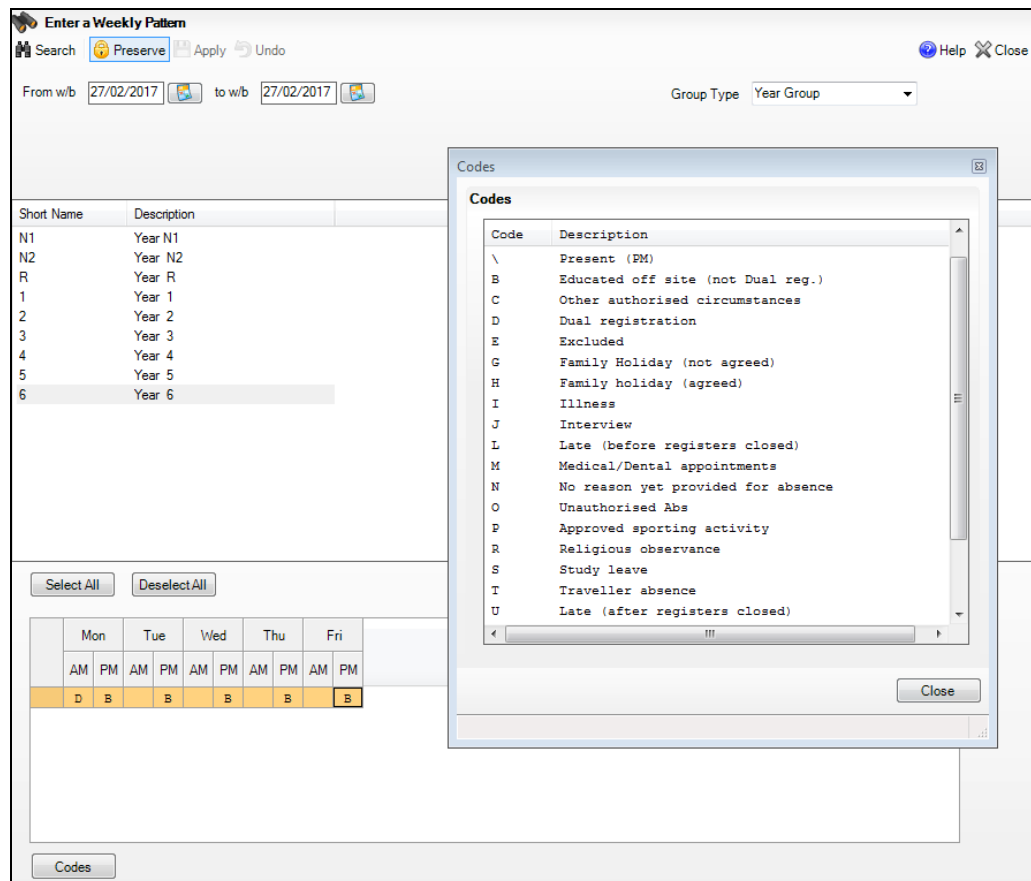
   Double-clicking the required code populates the current cell and the highlight moves down to the next cell.

   The Codes dialog can remain open for reference while marks are entered. Click the Cancel button to close the dialog.

7. Click the **Apply** button to display the **Activity Log**, which shows a summary of the data entered.

   Click the **Yes** button to apply the pattern of marks to the specified pupil/student records. For example, if Years 2, 3 and 4 are selected, the weekly pattern of marks entered, e.g. educated of site on Tuesdays, will apply to every pupil/student in those year groups for the date range specified.

Alternatively, click the **No** button to return to the **Enter a Weekly Pattern** page, where new parameters can be selected.

Schools with a Timetable Cycle of More than One Week

If your school has a timetable cycle of more than one week, e.g. two weeks (i.e. 10 days), <u>session</u> marks will be saved to <u>every</u> week in the date range, regardless of whether it is week one or week two. Therefore, it is only necessary to enter a pattern of weekly marks in week one, as the marks will automatically be copied to all weeks in the cycle.

More Information:
Entering Registration Marks on page *27*

Managing Exceptional Circumstances in England

Applicable to Schools in English Only

When pupil/students are unable to attend school due to the school being closed, schools in England can use the attendance code **Y** (unable to attend due to exceptional circumstances) or code **#** (planned whole or partial school closure) to record their attendance.

The following are examples of situations where the **Y** code should be used.

Unplanned closures where:

- all or some pupil/students are not required to attend school because the school site, or part of the school site, is closed due to unavoidable circumstances, e.g. the heating breaking down or flooding in certain classrooms.
- individuals or several pupil/students are unable to attend school due to one-off situations, e.g. failure of transport provided by the school or the local authority.

The following are examples of situations where the **#** code should be used.

Planned closures where:

- all or part of the school is being used as a polling station.
- there are occasional days when the pupil/students and staff are on holiday.

The DfE requires that a reason is recorded for each exceptional circumstance.

> *NOTE: Marks are not updated for pupil/students who have been added to a register.*

Creating an Exceptional Circumstance Record

1. Select **Focus | Attendance | Exceptional Circumstances** to display the **Find an Exceptional Circumstance** browser.

2. Click the **New** button to display the **Create an Exceptional Circumstance** page.

3. A date range from today AM to today PM is displayed by default. If a different date range is required, enter the dates in the **From** and **to** fields or click the associated **Calendar** buttons and select the required dates.

 Calendar button

Specify **AM** or **PM** by selecting from the drop-down lists.

The date range can be set to a single session, e.g. from 04/07/2017 AM to 04/07/2017 AM or a range of sessions, e.g. from 22/05/2017 AM to 16/06/2017 PM.

4. By default, the **Group Type** is displayed as **Whole School**. If a different **Group Type** is required, select the group from the drop-down list then click the **Search** button to refresh the display.

5. To **Include accepted applicants** in the list of pupil/students available for selection, select the associated check box then click the **Search** button to refresh the display.

6. Select the required attendance **Code** from the drop-down list, i.e. **Y** or **#**.

7. Enter the reason for the exceptional circumstance in the **Description** field, e.g. `school bus broke down`, `block B classrooms flooded`, `school used as polling station`, etc.

8. Highlight the pupil/students who are not attending school due to the exceptional circumstance.

   To select more than one pupil/student, hold down the **Ctrl** key and click to highlight them. The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the **Create an Exceptional Circumstance** page) can also be used, if required.

> *TIP: Click any column heading to order the content of the display by that column.*

9. Click the **Apply** button to display the **Activity Log**, which shows a summary of the data entered.

10. Click **Yes** to apply the **Code** to each of the selected pupil/students for the date range specified, or **No** to return to the **Create an Exceptional Circumstance** page, where new parameters can be selected.

11. Details of the closure can be printed by clicking the **Print** button.

Editing an Exceptional Circumstance Record

Details of an exceptional circumstance, i.e. the attendance code, the date range and the description, can be edited, if required. The pupil/students' attendance records are updated automatically when the edited details are applied.

1. Select **Focus | Attendance | Exceptional Circumstance** to display the **Find an Exceptional Circumstance** browser.

2. Enter the required date range (if different to the dates displayed) in the **From** and **To** fields or click the associated **Calendar** buttons and select the required dates.

 Calendar button

3. Click the **Search** button to display a list of school closures due to exceptional circumstances that occur between the specified dates.

4. Double-click the exceptional circumstance you want to edit. Alternatively, highlight the exceptional circumstance, then click the **Open** button to display the **View/Edit Exceptional Circumstance** page.

5. Edit the date range, **Code** and **Description**, if required.

> *NOTE: The list of pupil/students affected by the school closure is read-only.*

If the list of pupil/students is incorrect, the exceptional circumstance record should be deleted and a new record created, selecting the correct pupil/students (please see *Deleting an Exceptional Circumstance Record* on page *85*).
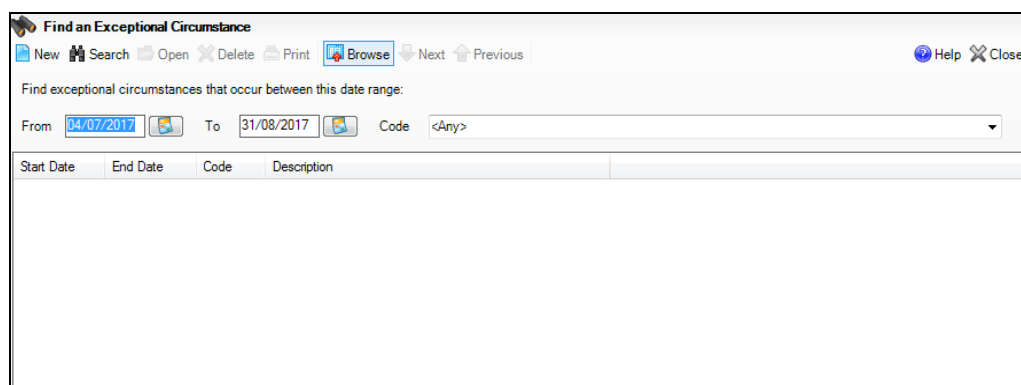
6. Click the **Apply** button to display the **Activity Log**, which shows a summary of the data entered.

7. Click **Yes** to apply the **Code** to each of the selected pupil/students for the date range specified, or **No** to return to the **View/Edit Exceptional Circumstance** page, where new parameters can be selected.

8. Details of the closure can be printed by clicking the **Print** button.

Deleting an Exceptional Circumstance Record

1. Select **Focus | Attendance | Exceptional Circumstance** to display the **Find an Exceptional Circumstance** browser.

2. Enter the required date range (if different to the dates displayed) in the **From** and **To** fields or click the associated **Calendar** buttons and select the required dates.

 Calendar button

3. Click the **Search** button to display a list of school closures due to exceptional circumstances that occur between the specified dates.

> *TIP: It could be beneficial to print the details of the exceptional circumstance before deletion. This is achieved by highlighting the record that is about to be deleted then clicking the **Print** button to display a **Print** dialog. Ensure that the printer settings are correct then click the **OK** button.*

4. Highlight the required exceptional circumstance and then click the **Delete** button. A dialog requesting confirmation of the deletion is displayed.

5. Click the **Yes** button to delete the selected exceptional circumstance.

Managing Exceptional Circumstances in Wales and Northern Ireland

Applicable to Schools in Wales and Northern Ireland Only

When pupil/students are unable to attend school due to exceptional circumstances, schools in Wales and Northern Ireland can use the **Y** code (partial or enforced closure/exceptional closure) to record their attendance mark.

There are two uses for the **Y** code:

- Where all or some pupil/students are not required to attend school because the school site, or part of the school site, is closed due to unavoidable circumstances, e.g. the heating breaking down or flooding in certain classrooms.
- Where individuals or several pupil/students are unable to attend school due to failure of transport provided by the school or the local authority.

The DfE requires that a reason is recorded for each exceptional circumstance.

> *NOTE: Marks are not updated for pupil/students who have been added to a register.*

Creating an Exceptional Circumstance

1. Select **Focus | Attendance | Exceptional Circumstances** to display the **Find an Exceptional Circumstance** browser.

2. Click the **New** button to display the **Create an Exceptional Circumstance** page.

3. A date range from today AM to today PM is displayed by default. If a different date range is required, enter the dates in the **From** and **to** fields or click the associated **Calendar** buttons and select the required dates.

     Calendar button

    Specify **AM** or **PM** by selecting from the drop-down lists.

    The date range can be set to a single session, e.g. from 04/07/2017 AM to 04/07/2017 AM or a range of sessions, e.g. from 22/05/2017 AM to 16/06/2017 PM.

4. By default, the **Group Type** is displayed as **Whole School**. If a different **Group Type** is required, select the group from the drop-down list then click the **Search** button to refresh the display.

5. To **Include accepted applicants** in the list of pupil/students available for selection, select the associated check box, then click the **Search** button to refresh the display.

6. Enter the reason why the pupil/students cannot attend (i.e. the nature of the circumstance) school in the **Description** field, e.g. `school bus broke down`, `block B classrooms flooded`, etc.

7. Highlight the pupil/students who are not attending school due to the exceptional circumstance.

    To select more than one pupil/student, hold down the **Ctrl** key then click to highlight them. The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the page) can also be used, if required.

> *TIP: Click any column heading to order the content of the display by that column.*

8. Click the **Apply** button to display the **Activity Log**, which shows a summary of the data entered.

9. Click **Yes** to apply the **Code** to each of the selected pupil/students for the date range specified, or **No** to return to the **Create an Exceptional Circumstance** page, where new parameters can be selected.

10. Details of the closure can be printed by clicking the **Print** button.

Editing an Exceptional Circumstance

Details of an exceptional circumstance, e.g. the date range and description, can be edited, if required. The pupil/students' attendance records are updated automatically when the edited details are applied.

1. Select **Focus | Attendance | Exceptional Circumstances** to display the **Find an Exceptional Circumstance** browser.

2. Enter the required date range (if different to the dates displayed) in the **From** and **To** fields or click the associated **Calendar** buttons and select the required dates.

 Calendar button

3. Click the **Search** button to display a list of exceptional circumstances that occur between the specified dates.

4. Double-click the exceptional circumstance you want to edit. Alternatively, highlight the exceptional circumstance and click the **Open** button to display the **View/Edit Exceptional Circumstance** page.

5. Edit the date range and **Description**, as required.

> *NOTE: The list of pupil/students affected by the exceptional circumstance is read-only.*
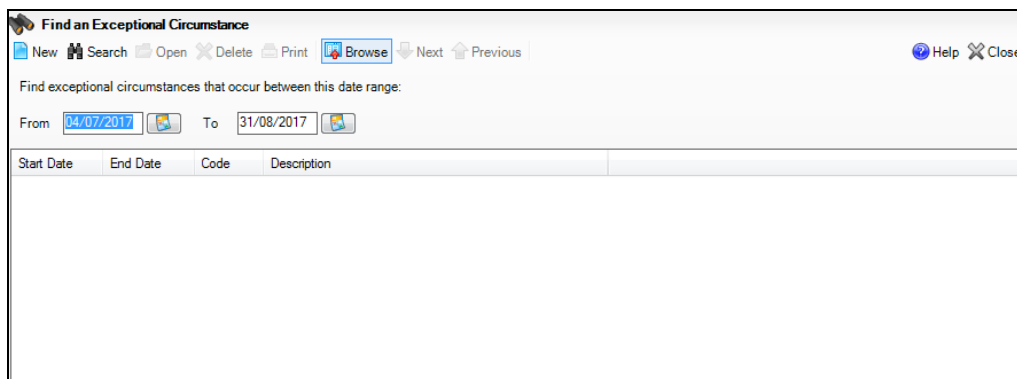
If the list of pupil/students is incorrect, the exceptional circumstance record should be deleted. A new record can then be created, and the correct pupil/students selected.

6. Click the **Apply** button to display the **Activity Log**, which shows a summary of the data entered.

7. Click **Yes** to apply the **Code** to each of the selected pupil/students for the date range specified, or **No** to return to the **View/Edit Exceptional Circumstance** page, where new parameters can be selected.

8. Details of the closure can be printed by clicking the **Print** button.

Deleting an Exceptional Circumstance

1. Select **Focus | Attendance | Exceptional Circumstances** to display the **Find an Exceptional Circumstance** browser.

2. Enter the required date range (if different to the dates displayed) in the **From** and **To** fields or click the associated **Calendar** buttons and select the required dates.

 Calendar button

3. Click the **Search** button to display a list of exceptional circumstances that occur between the specified dates.

> *TIP: It could be beneficial to print the details of the exceptional circumstance before deletion. This is achieved by highlighting the record that is about to be deleted then clicking the **Print** button to display a **Print** dialog. Ensure that the settings are correct for your printer before clicking the **OK** button.*

4. Highlight the required exceptional circumstance then click the **Delete** button. A dialog requesting confirmation of the deletion is displayed.

5. Click the **Yes** button to delete the selected exceptional circumstance.

05| **Displaying Marks**

Introduction to the Display Marks Routine

The Display Marks routine provides a read-only view of the selected pupil/student's session marks during the specified date range. An analysis of session marks, attendance by session and session code totals are also displayed.

This routine has many uses and can therefore be accessed by many of the school staff, including administration assistant, attendance manager, attendance operator, class teacher, registration tutor, school administrator, and the senior management team.

This functionality is particularly useful for looking at the attendance data for this year's on-roll pupil/students. However, it has many other uses including:

- Looking back at the attendance records for previous years (for on-roll pupil/students).
- Reviewing attendance record for the previous year (for last year's Leavers).

The following information is displayed:

- attendance marks for the academic year in which the specified **End Date** falls
- analysis of session marks, including a pie chart of session marks by category (i.e. Present, Authorised, Unauthorised and Missing)
- totals for each session code
- analysis of marks by session in week (e.g. Monday AM).

More Information:
Viewing Session Marks on page *95*

Searching for a Pupil/Student

1. Select **Focus | Attendance | Display Marks** to display the **Find Student** browser.

A combination of all the fields and drop-down lists can be used to refine the search for a pupil/student, depending on the information available to you. Alternatively, the fields can be left blank to list all the pupil/students in the school.

Search fields are not case sensitive and partially entering a pupil/student's surname in the **Surname** field will display all pupil/students whose surname begins with the letters entered. For example, entering 'At' in the **Surname** field will display pupil/students with the names of Atkins, Atkinson, Attwood, etc. In addition, you can use either ***** or **?** as wildcards, e.g. entering S*rind* will return both Sarinda and Surinder.

2. Enter a pupil/student name in the **Surname** and/or **Forename** fields as required.

3. To limit the records returned, select the **Tier**, i.e. **Year Group**, **Class**/**Reg Group** or **House** from the applicable drop-down list.

    The lists default to **Any**. It is also possible to select **None** to view any pupil/students who do not belong to any of the specified groups.

    By default, pupil/students with the status of **Current** will be listed, but it is possible to select **Leavers** or **Guest** pupil/students from the **Status** drop-down list, if required. Leavers are pupil/students who have a date of leaving on or before the current date and after the last date of arrival.

4. Click the **Search** button or press **Enter** to list all pupil/students that match the search criteria specified.

5. Double-click the required pupil/student to display the **Student Marks** page. Alternatively, highlight the pupil/student and click the **Open** button.

Viewing Session Marks

1. Select **Focus | Attendance | Display Marks** to display the **Find Student** browser.

2. Select the required pupil/student (as described previously) to display the **Student Marks** page.

These options are available to Lesson Monitor users only

By default, the **Student Marks** page displays a **Week View** for **Sessions** from the beginning of the year to yesterday. The following information is displayed for the selected pupil/student:

- The pupil/student's name and registration group (located at the top left-hand side of the **Student Marks** page).
- **Attendance marks**, i.e. session marks, for the whole of the year containing the **End Date**, i.e. the end of the analysis period.
- Pie chart based on the analysis of session marks. The chart displays session marks by category, i.e. **Present**, **Authorised**, **Unauthorised** and **Missing**, from the beginning of the year to the **End Date**.

- **Analysis of session marks** from the beginning of the year to the **End Date**, i.e. the end of the analysis period.

> *NOTE: Missing marks are not counted in any totals. Therefore, if there are any missing marks the totals for **Present, Authorised Absence** and **Unauthorised Absence** will not total the **Possible Attendances**.*

- **Session code totals** from the beginning of the year to the **End Date**, i.e. the end of the analysis period.

- **Attendance by session** displays the analysis of marks by session in week (Mon AM, Mon PM, etc.) from the beginning of the year to the **End Date**, i.e. the end of the analysis period.

3. Select either the **Week View** or **Month View** radio button, as appropriate. The display automatically changes when the radio button is selected.

- **Week View**

    If the **Week View** radio button is selected, the **Attendance marks** panel is displayed on the left-hand side of the page.

    Hovering over a cell displays the date, session, registration tutor's name and registration group associated with that session, together with minutes late and comments, if applicable.

> *NOTES: Cells with a cyan coloured background indicate that minutes late have been recorded.*
>
> *A red triangle displayed in the top right-hand of the cell indicates that a comment has been added (please see* Entering Comments Relating to a Pupil/Student *on page* 38*).*

- **Month View**

  If the **Month View** radio button is selected the display changes (as shown in the following graphic) and a **Show days** check box is displayed in the **Attendance marks** panel.

  If the **Show days** option is selected, the number of each day is displayed above the marks in each cell. Each cell displays the AM and PM mark for that day.

The date (in dd/mm/yyyy format) associated with a mark can be seen by hovering over the appropriate cell.

Deselecting the **Show days** check box displays a compact view, as shown previously.

> NOTE: The **Month View** shows two marks in a cell and therefore it is not possible to indicate where there is a comment or minutes late, nor can they be displayed as a tooltip. However, this information can be seen in the **Week View** and in all other grids throughout Attendance in SIMS.

4. By default, the **End Date** for analysis is set to yesterday's date. However, this date can be changed by entering the required date in the **End Date** field or by clicking the **Calendar** button and selecting the required date.

   Calendar button

   The **End Date** refers to the end of the analysis period for the three analysis panels, i.e. **Analysis of marks**, **Session code totals** and **Attendance by session**.

   > NOTE: If you want to view a pupil/student's attendance for the previous year, set the **End Date** to a date that fell in the previous year. If an analysis of the whole of the previous year is required, enter the last day of the summer term or a date in the summer holidays.

5. If the date has been changed, click the **Refresh** button.

   The system refreshes the **Analysis of marks**, **Session code totals**, **Attendance by session** and, if the new date is in a different Academic Year, the display of **Attendance marks** is also refreshed.

6. Clicking a code in the **Session code totals** panel automatically highlights the selected code throughout the **Attendance marks** panel.

This functionality is provided to enable the user to see when, and how frequently, codes have been entered for the selected student. This can be useful for determining trends, e.g. ill on Mondays, always absent at the same time as another pupil/student, missing marks, etc.

*NOTE: Only codes that appear in the pupil/student's attendance marks for the specified date range are displayed in the **Session code totals** panel. For example, if the pupil/student has not taken any agreed family holiday during the specified date range, code **H** is not included in the list of codes that can be selected.*

7. To run a report based on the information displayed on the **Student Marks** page:

   a. Click the **Print** button to display the **Run a Screen Based Report** dialog (please see *Running a Screen Based Report* on page *155*).

   b. Ensure that the settings are as required, then click the **OK** button.

   The data is displayed in your web browser and has a similar format to that displayed on the **Student Marks** page.

   *NOTE: The **Attendance marks** section may span across several pages depending on the date range.*

   Any comments entered via the register for the selected pupil/student (during the selected date range) are displayed at the end of the report.

Session Comments(Attendance Year 2012/2013)		
Session	**Teacher**	**Comment**
05/09/2012 AM	Mr R. Perrin	Missed the bus parent had to give lift
11/09/2012 AM	Mr R. Perrin	Could not find his reading book.
13/09/2012 AM	Mr R. Perrin	Gwenneth could not find her spellings list needed for today
19/09/2012 AM	Mr R. Perrin	Had doctors' appointment before school - unexpectedly was running a little late.

8. The **Next** and **Previous** buttons can be used to display the next or previous pupil/student's marks, without returning to the **Find Student** browser.
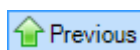
   ⬇ Next   *Next button*   ⬆ Previous   *Previous button*

   To confirm which pupil/student data will be displayed, position the cursor over the **Next** or **Previous** button, as applicable.

   The current browse list is dependent on the filter criteria used to find the original pupil/student.

   *NOTE: The currently specified **End Date** and view remain the same but can be changed, if required.*

   To select a pupil/student who does not appear in the current browser list, click the **Browse** button to return to the **Find Student** browser, where different filter options can be selected. For example, if you wish to view all pupil/students in a specific year group, select as appropriate from the **Year Group** drop-down list, then click the **Search** button to refresh the display. Double-click the required pupil/student's name to display their data on the **Student Marks** page.

Managing the Attendance Summary on the Home Page

A summary of pupil/student attendance can be displayed in the **Attendance Summary** panel on the SIMS **Home Page**, enabling various aspects of attendance to be monitored. Multiple instances of the **Attendance Summary** panel can be displayed and configured to suit your needs, e.g. one to display data for the whole school today and another to display selected year group(s) for the year to date. For statistical purposes, one or more groups can be displayed in each **Attendance Summary** panel.

The SIMS **Home Page** default setting provides one **Attendance Summary** panel.

The **Attendance Summary** panel provides the option to **Toggle** between the **Attendance Summary** and the **Today's Unauthorised Absences** view.

This is achieved by clicking the **Options** button (located at the top right-hand side of the panel) then selecting **Toggle** from the pop-up menu.

   Options button

The information displayed can be viewed in a variety of orders. Right-click anywhere in the **Today's Unauthorised Absences** panel then select the required option to display the content in the selected order. Revert to the original display by right-clicking anywhere in the panel then selecting **Hide Groups** from the pop-up menu.

Additional information regarding the selected pupil/student can be accessed by double-clicking their name in the data table to display their page on the **Pupil** (or **Student**) **Teacher View**. These options are also available in the maximised view (please see *Increasing the Attendance Summary Display* on page *101*).

To revert to the **Attendance Summary** panel (bar chart view)**,** click the **Options** button then select **Toggle** from the pop-up menu.

*IMPORTANT NOTE: If a mark is entered in Take Register for a future session or lesson, this is included in the figures in the **Attendance Summary** panel.*

Additional Resources:

Configuring and Using the SIMS Home Page mini guide

Increasing the Attendance Summary Display

The method for maximising and minimising both the **Attendance Summary** panel and the **Today's Unauthorised Absences** panel is the same.

1. Click the **Maximise** button in the top right-hand corner of the **Attendance Summary** panel for which you wish to enlarge the display.

 Maximise button
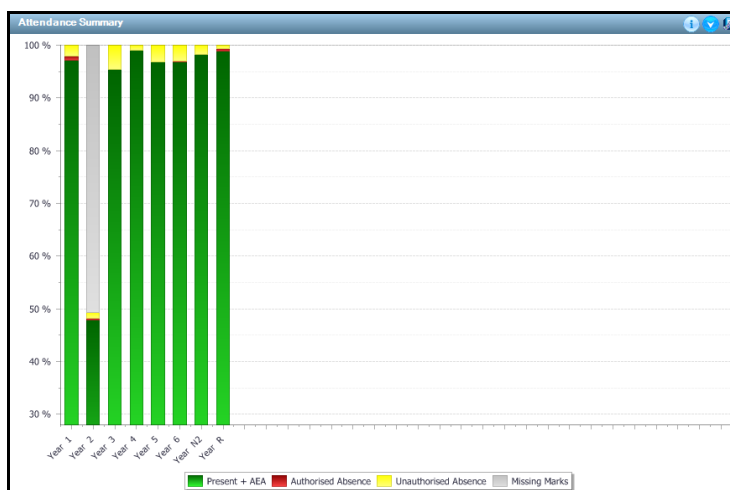
2. Hover over a coloured segment of the bar chart to display the **Present + AEA**, **Authorised Absence**, **Unauthorised Absence** and **Missing Marks** data (shown as numbers and percentages) for the selected criteria.

3. To toggle between the **Attendance Summary** and the **Today's Unauthorised Absences**, click the **Options** button (located at the top right-hand side of the page) then select **Toggle** from the drop-down list.

   Options button

4. To minimise the **Attendance Summary**/**Today's Unauthorised Absences** panel and return to the SIMS **Home Page**, click the **Minimise** button in the top right-hand corner of the page.

   Minimise button

Printing the Attendance Summary Data

Two printed outputs are available from this widget. With the **Attendance Summary** displayed, the bar chart is printed. With **Today's Unauthorised Absences** displayed, the data is printed in surname then forename order, regardless of the display order on-screen.

Click the **Options** button then select **Print** from the pop-up menu to display the diary in your web browser, from where it can be printed.

Options button

Attendance Summary bar chart output:
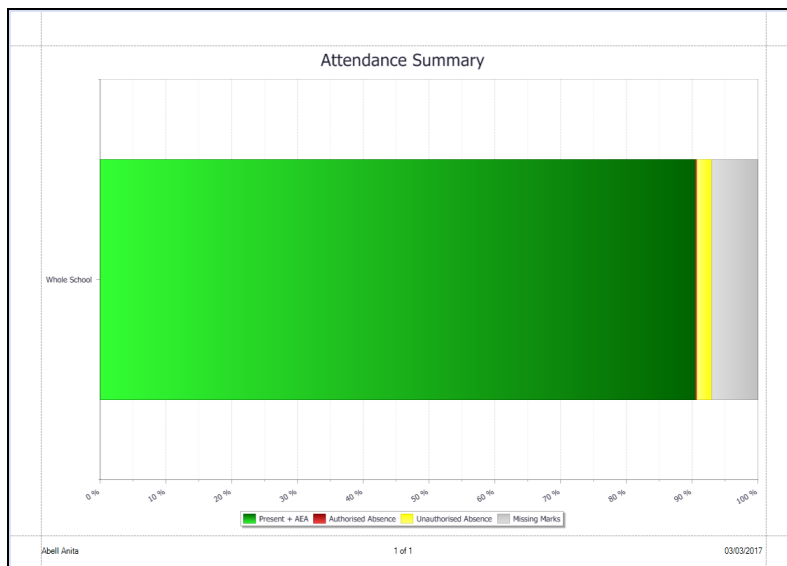
Today's Unauthorised Absences output:

Attendance Summary

Surname	Forename	Reg. Group	Session / Lesson	Code
Aaron	Chris	3CB	PM	N
Aaron	Chris	3CB	AM	N
Aaron	Liz	3CB	AM	N
Aaron	Liz	3CB	PM	N
Adasheji	Mohammed	3CB	PM	N
Adasheji	Mohammed	3CB	AM	N
Americana	Kari	5DT	AM	N
Americana	Kari	5DT	PM	N
Amoso	Silv	6KH	PM	N
Amoso	Silv	6KH	AM	N
Amoso	Stephanie	6KH	PM	N
Amoso	Stephanie	6KH	AM	N
Atkinson	Ben	6KH	PM	N
Atkinson	Ben	6KH	AM	N
Avatar	Ahman	3CB	AM	N
Avatar	Ahman	3CB	PM	N
Ballinger	Eden	5BB	PM	N
Ballinger	Eden	5BB	AM	N
Brown	Jeremy	6KH	PM	N
Brown	Jeremy	6KH	AM	N
Carlin	Tayla	6KH	AM	N
Carlin	Tayla	6KH	PM	N
DiMonaco	Silvana	OAK	PM	N
DiMonaco	Silvana	OAK	AM	N
Douglas	David	6KH	PM	N
Douglas	David	6KH	AM	N
Fell	Mia	3CB	PM	N
Fell	Mia	3CB	AM	N
Francis	Adam	2GH	AM	N
Francis	Adam	2GH	PM	N
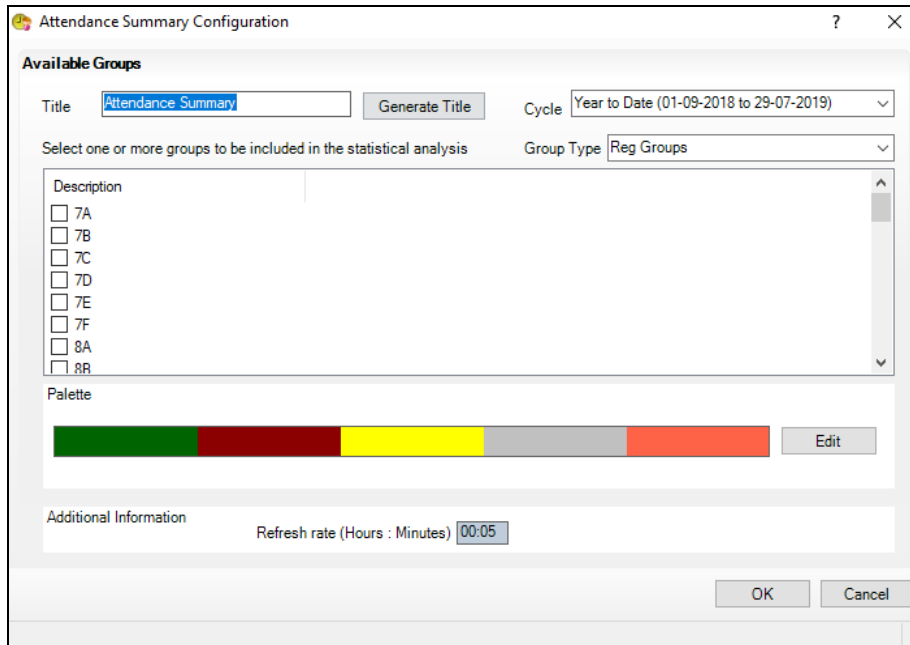
More Information:
Accessing the Register via the SIMS Home Page on page *24*

Configuring the Attendance Summary Panel

The method for configuring each **Attendance Summary** panel is identical, regardless of the data displayed.

1. Select **Focus | Home Page** to display the SIMS **Home Page**.

2. Click the **Options** button at the top right-hand side of the **Attendance Summary** panel (or **Today's Unauthorised Absences** panel), then select **Configure** from the drop-down list to display the **Attendance Summary Configuration** dialog.

Options button
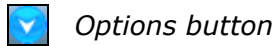
3. Select the period over which you wish to display the attendance information in the **Attendance Summary** panel (the **Today's Unauthorised Absences** panel always displays only today's details). Select the required **Cycle** option from the drop-down list:

   - **Year to Date**
   - **Previous Term**
   - **Previous Month**
   - **Previous Fortnight**
   - **Previous Week**
   - **Week to Date**
   - **Today**
   - **Previous Day**.

   > NOTE: The **Cycle** applies only to data from the current academic year. Data from previous years cannot be viewed in the **Attendance Summary** panel.

4. Select the required **Group Type** from the drop-down list. The **Group Type** determines the range of data displayed in the **Attendance Summary** panel, the options are:

   ▪ **Reg Groups**

   ▪ **Year Groups**

   ▪ **Houses** (available to secondary schools only)

   ▪ **User Defined Groups**

   ▪ **Whole School**.

5. Select the required **Description** check box(es) to specify the group(s) you want to include in the attendance summary.

6. A default **Title** for the panel is displayed but can be edited, if required.

   Alternatively, click the **Generate Title** button to create a panel title based on the selected group(s), e.g. **Attendance Summary for Year 4**.

7. The colour scheme for the bar chart can be edited by clicking the **Edit** button in the **Palette** panel to display the **Palette Editor** dialog.
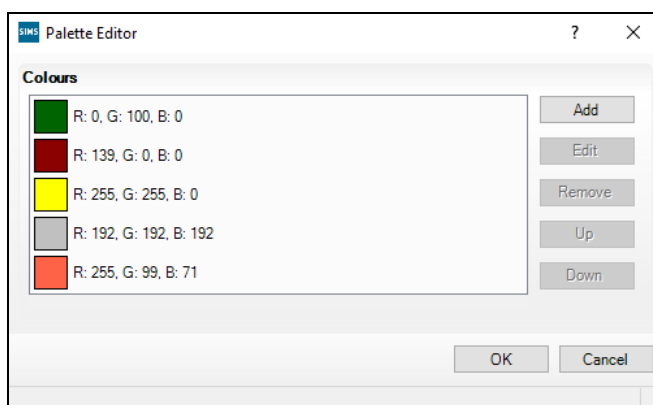
8. Click the **Add** button to add a colour to the palette.

9. Highlight a colour to **Edit**, **Remove** or reposition it within the palette.

10. Click the **OK** button to return to the **Attendance Summary Configuration** dialog.

11. Enter the **Refresh rate (Hours:Minutes)** or use the **Up** and **Down** arrow buttons to select the required value. This functionality is available only if widget refresh rate configuration has been enabled by the System Manager.

12. Click the **OK** button to return to the SIMS **Home Page**, where the updated panel configuration is displayed.

Additional Resources:

Configuring and Using the SIMS Home Page mini guide

More Information:

Adding and Removing Panels from the SIMS Home Page on page *106*

Adding and Removing Panels from the SIMS Home Page

> **WARNING:** *Prior to adding panels to the SIMS **Home Page**, please consider the performance issues that this might cause. Some of the panels that can be displayed on the SIMS **Home Page** might be set to refresh regularly. If the SIMS **Home Page** for many concurrent users contains a large number of panels, this could lead to a reduction in the performance level of your SIMS system.*

There are two types of panel that can be displayed on the SIMS **Home Page**, **Multi-use** panels and **Single-use** panels.

One or more instances of a **Multi-use** panel can be displayed on the Home Page. The **Attendance Summary** panel is included in this category, enabling customised attendance data to be displayed in separate panels.

1. Select **Focus | Home Page**, then click the **Configure** button on the Home Page toolbar to display the **Configure Home Page** dialog.
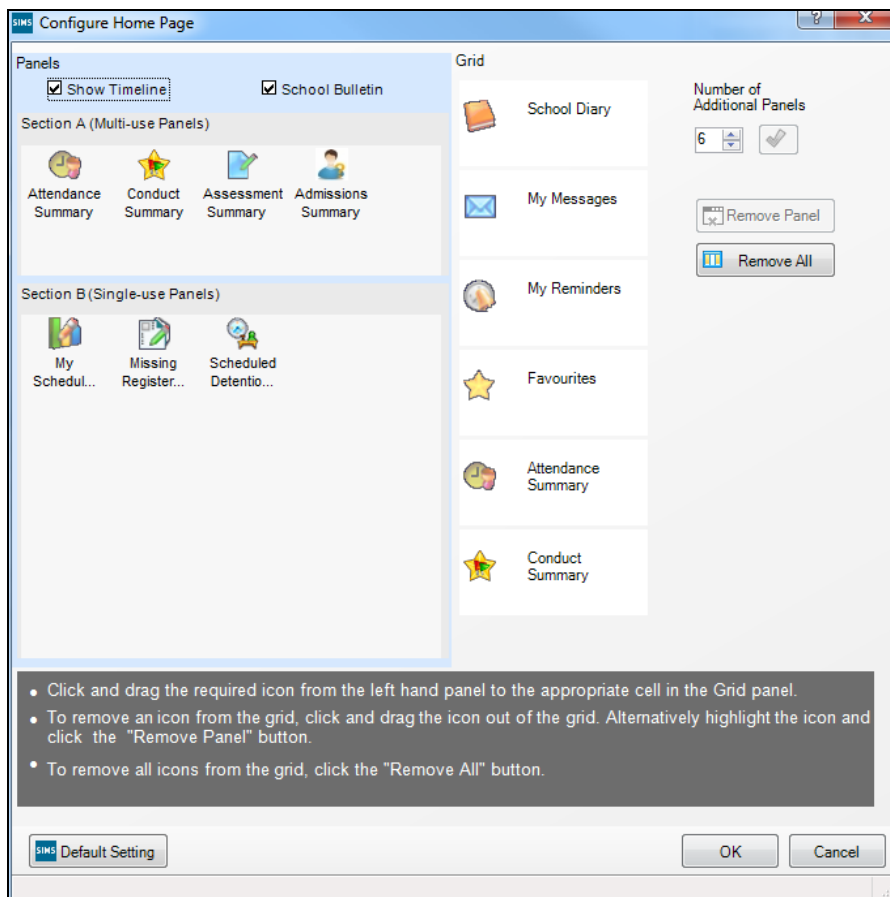
2. To add one or more **Attendance Summary** panels, increase the number of cells in the grid by specifying the **Number of Additional Panels** then clicking the **Configure layout** button to affect the change.

 Configure layout button

3. Select the panel by dragging and dropping the **Attendance Summary** icon from **Section A (Multi-use Panels)** to the newly created empty cell.
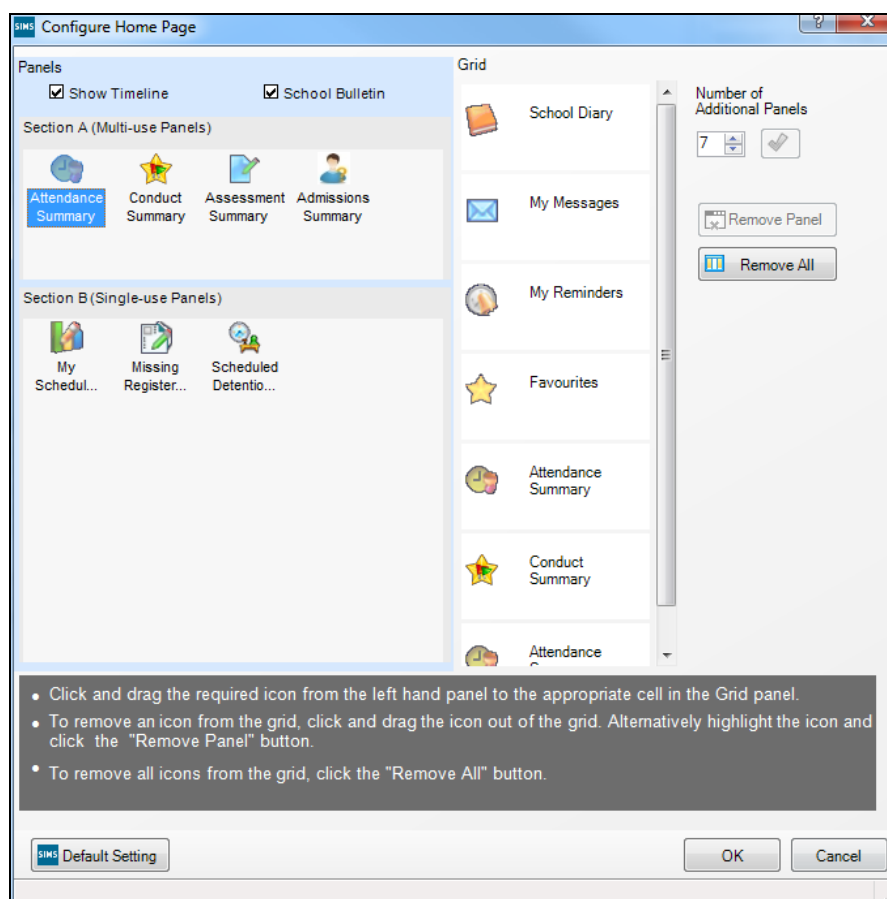
4. To remove an **Attendance Summary** panel from the SIMS **Home Page**, click and drag the panel icon you wish to remove out of the **Grid**.

    Alternatively, highlight the cell containing the panel icon then click the **Remove Panel** button. A confirmation message is displayed. Click the **OK** button to remove the selected panel.

    An empty cell remains, enabling you to add a different panel, if required.

5. To remove an empty cell from the **Grid**, reduce the **Number of Additional Panels** to that needed to accommodate the required panels.

6. Click the **OK** button to return to the SIMS **Home Page**, where the new layout is displayed.

    > *NOTE: Panels displaying a message informing you that **There is no data to show** must be configured to enable data to be displayed (please see* Configuring the Attendance Summary Panel *on page* 104*).*

Changing the Order of Panels on the SIMS Home Page

The panels on the SIMS **Home Page** can be re-arranged as required, enabling you to position them in a specific order, e.g. you may wish to display all **Attendance Summary** panels on the left-hand side of the screen.

1. Select **Focus | Home Page** then click the **Configure** button on the SIMS **Home Page** toolbar to display the **Configure Home Page** dialog.

2. To allow enough 'space' to reposition the panels, add several cells to the **Grid** by adjusting the **Number of Additional Panels** then clicking the **Configure layout** button.
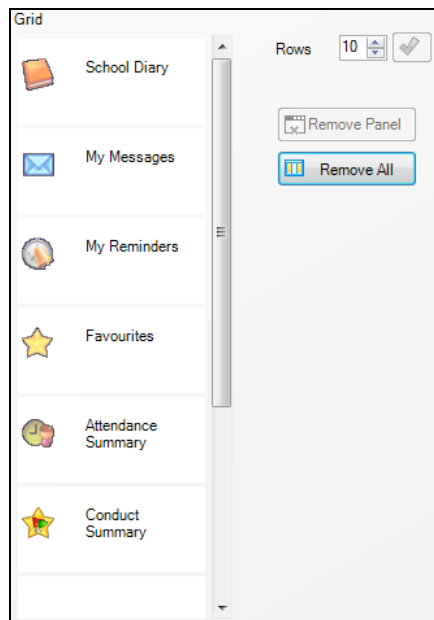
3. Click and drag the required panel(s) to the new location(s) on the **Grid**.

4. Click the **OK** button to return to the SIMS **Home Page**, where the new layout is displayed.

Additional Resources:

Configuring and Using the SIMS Home Page mini guide

06| **Housekeeping Routines**

Viewing Extra Names Added to Registers

Adding names to a register is a temporary measure, enabling an additional pupil/student's attendance to be recorded for a particular session.

This routine enables users with appropriate permissions, e.g. office staff, to view a list of extra names that have been added to registers between a specified date range.

This information can be used to update registration group lists, which will assist registration tutors when taking the register.

More Information:
Adding Extra Names to a Register on page *36*

Searching for Extra Names Added to Registers

1. Select **Routines | Attendance | View Extra Names** to display the **View Extra Names** browser.

2. A default date range of 'from one month ago to yesterday' is displayed. To change the date range, enter the required dates in the **From** and **to** fields or click the associated **Calendar** buttons and select the required dates.

    Calendar button

3. **Year Group** is displayed by default. If a different Group Type is required, select the group from the drop-down list, then click the **Search** button to refresh the display.

4. Select the group or groups in which to search for extra names.

   To select a single group, click the required group to highlight it.

To select more than one group, hold down the **Ctrl** key and click the required groups to highlight them.
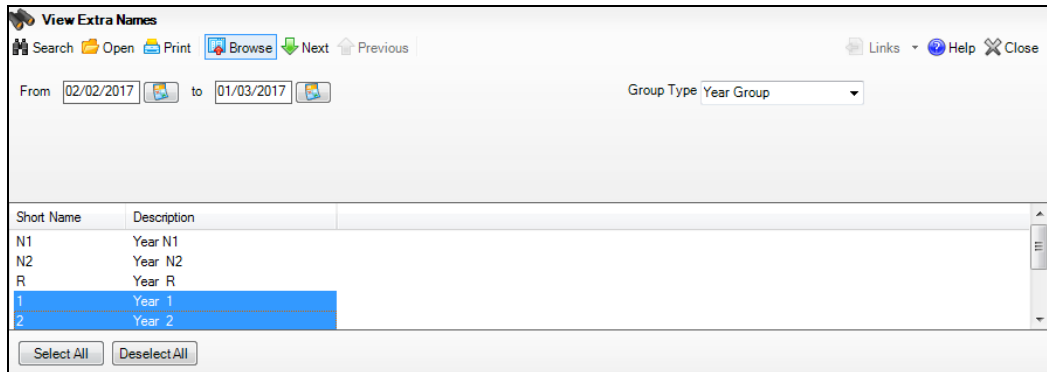
The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the browser) can also be used, if required.

5. Click the **Open** button to display the **View Extra names** page.

*NOTE: One group at one time is displayed on the **View Extra names** page. If you have selected more than one group to view, click the **Next** or **Previous** button, as applicable.*

Dealing with Extra Names Added to Registers

The View Extra Names routine enables you to view extra name that have been added to registers but now need to be permanently added to a registration group.

The **View Extra names** page lists the names of the pupil/students, their registration group (if any), the registration group they were added to, the date they were added, the session they were added to and the registration tutor/teacher's name.

After the pupil/student has been permanently added to a registration group, their name should be deleted from the **View Extra names** page, to ensure that the process is not carried out again.

1. Select **Routines | Attendance | View Extra Names** to display the **View Extra Names** browser.
2. Select the required criteria, i.e. date range, group type, etc. (please see *Searching for Extra Names Added to Registers* on page *109*).

3. Click the **Open** button to display the **View Extra names** page.

4. It could be beneficial to print the details of the extra names. This is achieved by clicking the **Print** button to display the **Print** dialog. Ensure that the settings are correct for your printer then click the **OK** button.

5. Add the pupil/student to the relevant registration group via **Focus | School | Academic Structure**. For more information, please refer to the *Academic Management* handbook.

6. Once the pupil/student has been permanently added to a registration group, select the check box adjacent to their name, then click the **Delete** button.

> **IMPORTANT NOTE:** *The deleted record is immediately and permanently removed from the **View Extra names** page.*

Any extra names that are not deleted are displayed the next time that the View Extra Names routine is run.

> *NOTE: One group at one time is displayed on the **View Extra names** page. If you have selected more than one group to view, click the **Next** or **Previous** button, as applicable.*

Editing the Reason for Change of Mark

A default reason for change of mark must be defined as part of the set up process (**Tools | Setups | Attendance Setup**). However, if the default reason for change of mark is not appropriate for all marks that have been changed, individual reasons for change can be edited.

Searching for Changed Marks

1. Select **Routines | Attendance | Edit Reason for Change** to display the **Reason For Changes** browser.

2. A default date range of 'from one month ago to yesterday' is displayed. If a different date range is required, enter the appropriate dates in the **From** and **to** fields or click the associated **Calendar** buttons and select the required dates.

Calendar button
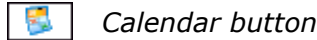
3. By default, the **Group Type** is displayed as **Whole School**. If a different **Group Type** is required, select the group from the drop-down list then click the **Search** button to refresh the display.

4. If you wish to **Include accepted applicants**, select the check box then click the **Search** button to refresh the display.

5. Double-click the required group or highlight the group and click the **Open** button to display the **Reason For Changes** page.

   To select more than one group, hold down the **Ctrl** key and click the required groups to highlight them. The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the browser) can also be used, if required.

Editing the Reason for Change

The **Reasons For Change** page displays the previous mark and the name of the person who recorded it, along with the name of the person who changed it and the new mark. The default reason for change (as defined via **Tools | Setups | Attendance Setup**) is displayed on the right-hand side of the grid.

The pupil/student's name, registration group, register date, class, the date and time of the change, and the method of entry, e.g. **Manual Entry**, are also displayed.

Only the **Reason For Change** column is editable.

1. In the **Reason For Change** column, click the required cell then select the applicable reason for the change from the drop-down list.

Name	Reg	Register Date	Class	Recorded by	Previou...	New Mark	Changed by	Date & time of...	Method	Reason for change
Aaron, Chris	6KH	27/02/2017 AM	Reg	Mrs G. Gros...	/	N	Mrs G. Grosvenor	27/02/2017 12...	Lesson Mark	Entered in error
		27/02/2017 PM	Reg	Mr O. Joyner	\	N	Mrs G. Grosvenor	27/02/2017 12...	Manual Entry	Entered in error
Aaron, Liz	6KH	08/02/2017 AM	Reg	Mrs G. Gros...	/	N	Mrs G. Grosvenor	05/08/2016 17...	Manual Entry	Entered in error
		08/02/2017 PM	Reg	Miss B. Bat...	\	N	Mrs G. Grosvenor	05/08/2016 17...	Lesson Mark	Entered in error
		22/02/2017 AM	Reg	Mrs G. Gros...	M	I	Mrs G. Grosvenor	05/08/2016 17...	Lesson Mark	Entered in error
		22/02/2017 PM	Reg	Mrs G. Gros...	\	N	Mrs G. Grosvenor	05/08/2016 17...	Lesson Mark	Entered in error / Other
		23/02/2017 AM	Reg	Mr O. Joyner	G	H	Mrs G. Grosvenor	05/08/2016 17...	Manual Entry	
		23/02/2017 PM	Reg	Mr O. Joyner	G	H	Mrs G. Grosvenor	05/08/2016 17...	Lesson Mark	Entered in error
		27/02/2017 AM	Reg	Mrs G. Gros...	/	L	Mrs G. Grosvenor	27/02/2017 12...	Manual Entry	Entered in error
		27/02/2017 PM	Reg	Miss B. Bat...	\	L	Mrs G. Grosvenor	27/02/2017 12...	Manual Entry	Entered in error
Aaron, Sophie	6VC	08/02/2017 AM	Reg	Mrs G. Gros...	N	/	Mrs G. Grosvenor	05/08/2016 17...	Manual Entry	Entered in error
		08/02/2017 PM	Reg	Mrs G. Gros...	\	N	Mrs G. Grosvenor	05/08/2016 17...	Lesson Mark	Entered in error
		27/02/2017 AM	Reg	Mrs G. Gros...	/	I	Mrs G. Grosvenor	27/02/2017 12...	Manual Entry	Entered in error
		27/02/2017 PM	Reg	Miss B. Bat...	\	I	Mrs G. Grosvenor	27/02/2017 12...	Lesson Mark	Entered in error
Abdullah, Tamwar	3TO	08/02/2017 AM	Reg	Miss B. Bat...	/	N	Mrs G. Grosvenor	05/08/2016 17...	Manual Entry	Entered in error

2. Click the **Save** button.

3. If you wish to save the details displayed on the screen, click to the **Print** button to display the **Run a Screen Based Report** dialog (please see *Running a Screen Based Report* on page *155*). The information is displayed in your web browser, from where the report can be printed, if required.

Additional Resources:

Producing Attendance Reports handbook - *History of Changes Report*

Resolving Conflicting Session Marks

By default, SIMS automatically resolves conflicting session marks that have occurred because an existing mark has clashed with a mark that has been read from an OMR Registration sheet or an OMR Absence sheet.

Conflicting marks are not generated if the existing mark in SIMS is a missing mark (**-**) or an unexplained absence mark (**N**).

This routine enables you to view conflicting marks then select which of the marks takes precedence in the pupil/student's attendance record.

1. Ensure that the **Allow automatic resolution of conflicting marks** check box has been <u>deselected</u> via **Tools | Setup | Attendance Setup | OMR Setup**.

> *NOTE: Once the **Allow automatic resolution of conflicting marks** check box has been deselected, SIMS must be restarted to ensure that the **Resolve Conflicting Session Marks** menu route is displayed.*

2. Select **Routines | Attendance | Resolve Conflicting Session Marks** to display the **Conflicting Session Marks** page.

   The following details are displayed:
   - the pupil/student's name
   - registration group
   - admission number
   - date the conflicting marks were recorded for
   - session the conflicting marks were recorded for
   - pre-existing mark recorded in SIMS
   - conflicting mark read from the OMR Registration or Absence sheet.

   For example:

Name	Reg Group	AdNo	Date	Session	Existing Mark	Conflicting Mark
Smith, John	ELM	123456	21/09/2017	AM	\	B

3. For each pupil/student listed, select either the pre-existing mark or the new mark read in from the OMR sheet. The mark you choose will take precedence in the pupil/student's attendance record.

4. Click the **Save** button to update the pupil/student's attendance record and delete the unselected marks from SIMS.

Additional Resources:

Recording Attendance using an Optical Mark Reader handbook

Archiving Attendance Marks

To improve the performance of SIMS when viewing and editing attendance marks, session marks can now be archived. All marks, with the exception of those recorded in the current academic year and the preceding academic year, can be archived.

When the data has been archived, it is no longer available for editing. However, reports can still be run on the archived data.

The process is performed using a scheduled task, which should to be set up by your System Manager.

If the archiving process is disrupted when the scheduled task is run, e.g. by a power cut, any attendance year that has been partially archived will be restored. The scheduled task archive log can be used to check which attendance years have been archived (please see *Viewing the Archive History Log* on page *124*).

> *IMPORTANT NOTES:*
>
> *A full database backup must be made before performing the archive process.*
>
> *The archiving process could take a considerable amount of time, depending on the number of years involved. Exclusive access to the database is also required. Therefore, it is recommended that the task is scheduled for a suitable date and time of day, e.g. when the school office is closed. During the night is an obvious choice.*
>
> *Depending on the quantity of data being archived, there is a possibility that the process could take a significant amount of disk space. The disk space requirement varies according to the number of pupil/students, the number of marks and the time period being archived. For example, if a school is archiving one attendance year, for 1,000 pupil/student and 50,000 marks per year, the disk space requirement is approximately 15MB.*

Selecting the Required Academic Years for Archiving

The **Archive Attendance Data** wizard is used to specify the attendance years to be archived when the dedicated scheduled task is run.

This process can be cancelled at any time by clicking the **Cancel** button.

1. Select **Tools | Housekeeping | Archive Attendance Marks | Archive** to display the **Archive Attendance Data** wizard (**Welcome** page).
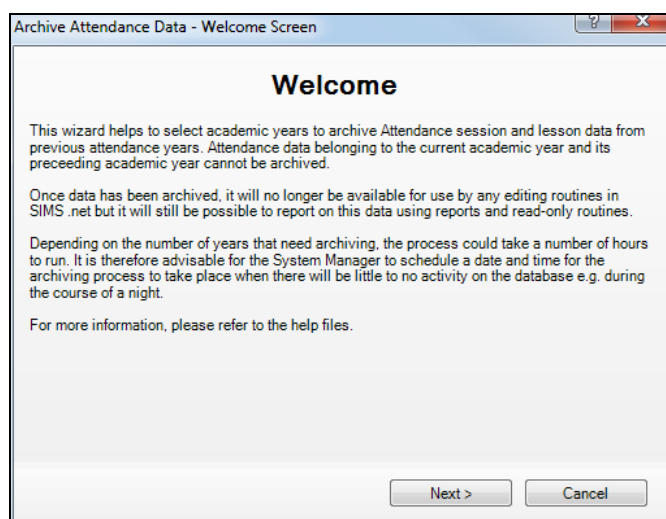
2. Click the **Next** button to display the **Years to Archive** page.
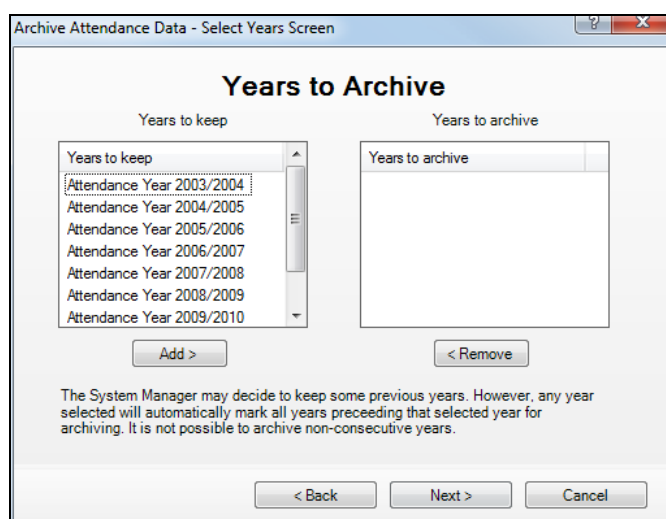
A list of Attendance Years for which marks can be archived is displayed in the left hand-side of the **Years to Archive** chooser.

3. Select the Attendance Year(s) to be archived.

In the **Years to keep** panel, highlighting the most recent attendance year that you wish to archive.

4. Click the **Add** button to move the highlighted attendance year <u>and all previous attendance years</u> to the **Years to archive** panel.

NOTE: It is not possible to archive non-consecutive years in one step. The archive process, i.e. selecting the Attendance Years and setting up a scheduled task, <u>must</u> be performed for each separate set of consecutive years.

5. Ensure that the years you want to keep are still displayed in the **Years to keep** panel. Use the **Add** and **Remove** buttons to reselect the relevant years, if required.

6. Click the **Next** button to display the **Summary** page.
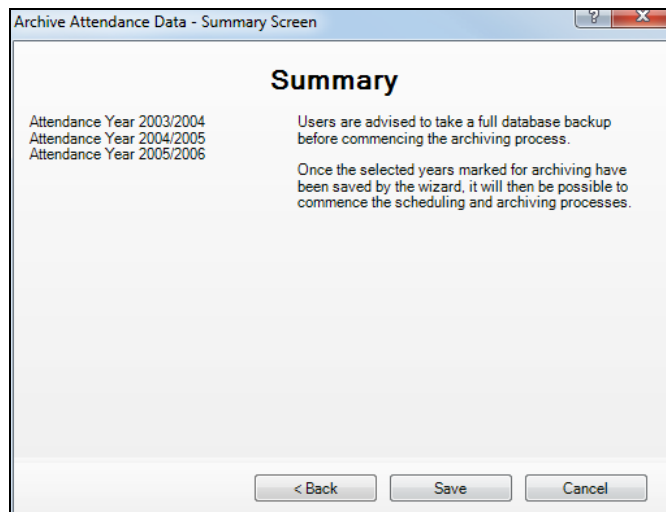
The Attendance Year(s) to be archived are displayed on the left-hand side.

7. Click the **Save** button to complete the selection process.

The attendance marks for the selected Attendance Year(s) are archived only when the scheduled task is run. An Archive Attendance Marks scheduled task should now be set up via Windows® **Control Panel**.

Setting up a Scheduled Task to Archive Attendance Marks

The time and date that are specified for the scheduled task should be chosen with care. This is because exclusive access to the database is required to run this routine, which could take a considerable amount of time, depending on the amount of data to be archived. The scheduled task should also be planned so that it does not coincide with any other SIMS scheduled task that might be set up, e.g. backups, B2B transfers, etc.

Although it is usual to set up a scheduled task on the SIMS Server, it is also possible to set up a scheduled task on a machine other than the server that is hosting the SIMS database. This can be achieved provided that the `ArchiveAttMarks.exe` is located on the machine where the scheduled task is to be created and that the person setting up the scheduled task is a local administrator.

Accessing the Task Scheduler

The following steps describe how to access the Task Scheduler in Windows® 7, 8, 8.1 and 10.

The process might vary for other versions of Windows.

1. Ensure that you have logged into Windows as an administrator.

2. The method of accessing Task Scheduler depends on the version of Windows that you are using.

Windows 7:

a. Select **Start** to display the **Start** menu.

b. Select All **Programs | Accessories | System Tools | Task Scheduler**.

Windows 8 or 8.1:

a.   Press the **Windows key+X** and select **Control Panel**.

b.   Select **System and Security | Administrative Tools | Task Scheduler**.

Windows 10:

a.   Select **Start** to display the **Start** menu.

b.   Carry out a search for `schedule` in the search bar.

c.   Select the **Schedule tasks** result.

3.   If administrator rights have been set up, you may also be required to enter a **Password**.

Archiving Attendance Marks - Windows 7, 8, 8.1 and 10

1.   In Windows Task Scheduler, click **Create Basic Task** in the **Actions** panel.
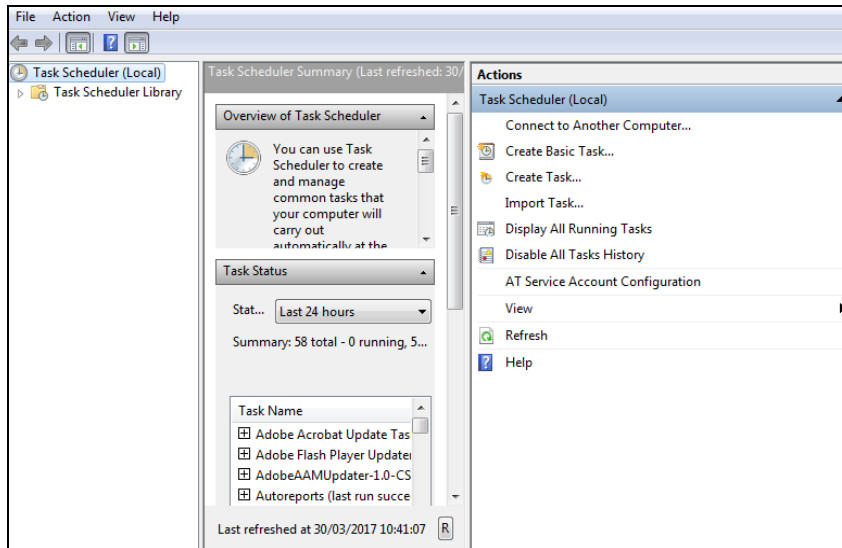
The **Create Basic Task** wizard is displayed.
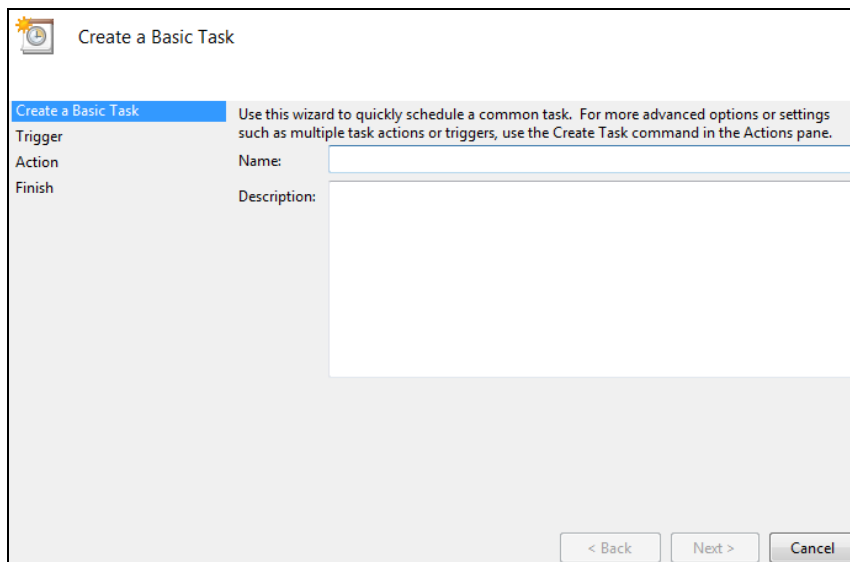
2. Enter an easily identifiable **Name**, e.g. `ArchiveAttMarks`, and a **Description** (optional) for the scheduled task.

3. Click the **Next** button to display the **Task Trigger** page.

4. Select the **One time** radio button to indicate when the task should be run.

5. Click the **Next** button to display the **One Time** page.
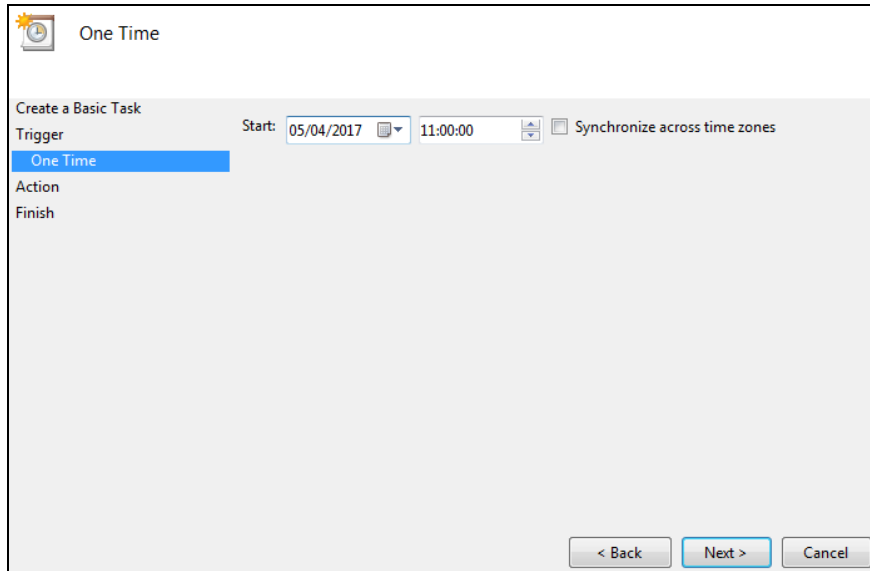
6. Specify the date and time at which you want the scheduled task to **Start**.
7. Click the **Next** button to display the **Action** page.
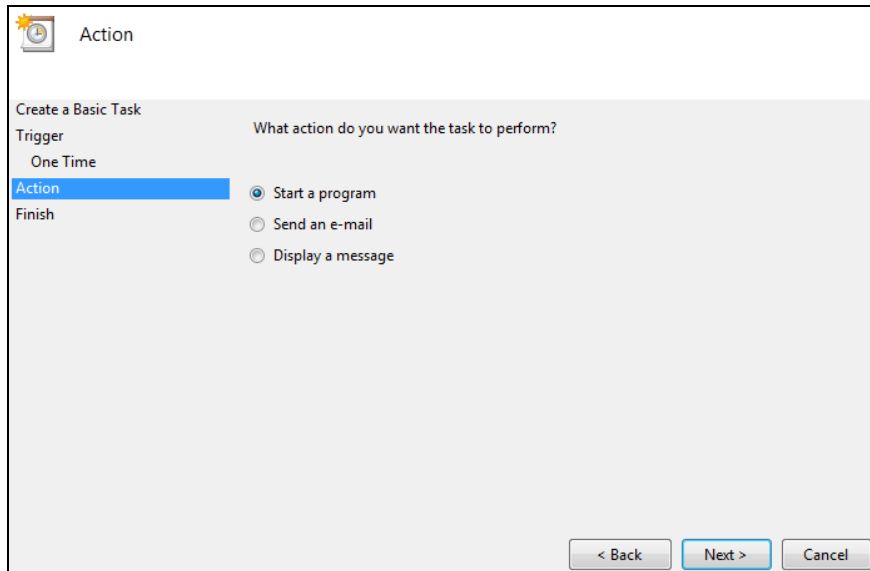
8. Ensure that the **Start a program** radio button is selected.
9. Click the **Next** button to display the **Start a Program** page.
10. Click the **Browse** button and navigate to `C:\Program Files\Microsoft SQL Server\MSSQL10.SIMS2012\MSSQL\Binn` (where `C:` indicates your local drive).

> *NOTE: The file location may vary depending on the version of Microsoft SQL Server installed. However, the required file is <u>always</u> located in the* `Binn` *folder.*
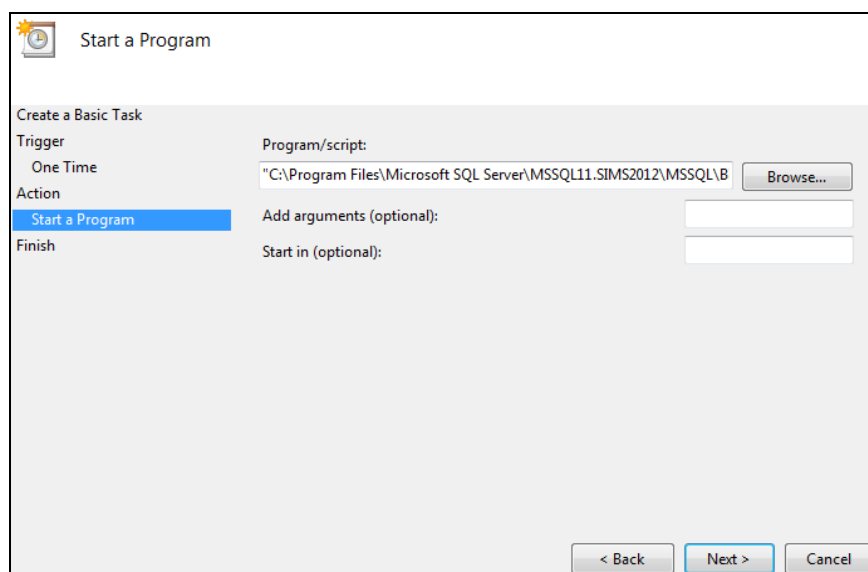
For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

11. Highlight `ArchiveAttMarks.exe` then click the **Open** button to return to the **Start a program** page.

    Enter the following archiving parameters in the **Add arguments (optional)** field.

    - If you are accessing SIMS using a User Name and Password:

      `/S♦<SIMS SQL server\instance name>♦/D♦<SIMS database name>♦/U♦<SQL server user name>♦/P♦<SQL server password>♦/V`

    - If you are accessing SIMS using Windows® Authentication (e.g. a Trusted User):

      `/S♦<SIMS SQL server\instance name>♦/D♦<SIMS database name>♦/V♦/T`

IMPORTANT NOTES:

It is essential that spaces are included, as indicated by the '♦' symbol in the previous examples.

The chevrons (<>) must <u>not</u> be entered. They are used only to encapsulate a description of the information you need to record.

Archiving parameters are case sensitive.

`/V` = Display errors on command line. This is optional.

`/T` = Use Windows Authentication (applicable to Trusted Users only).
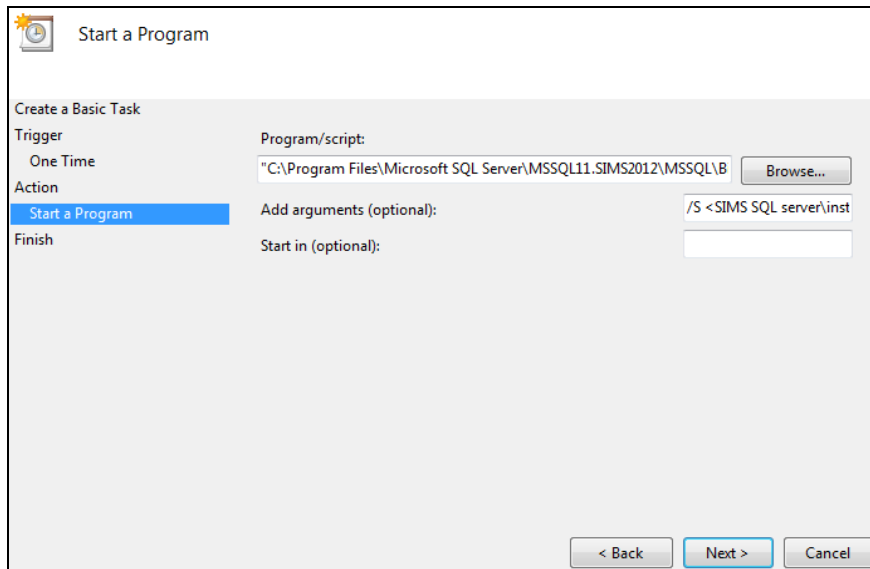
12. Click the **Next** button to display the **Summary** page.
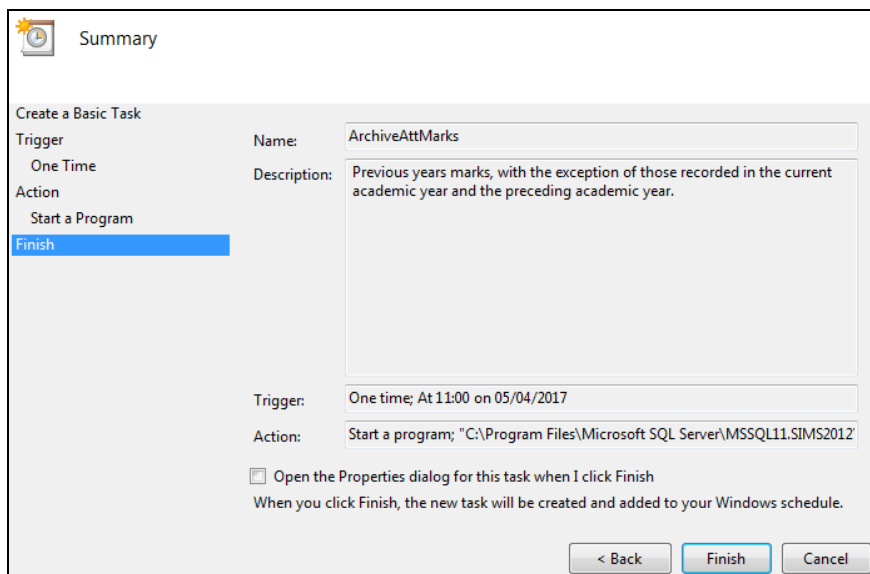
13. Click the **Finish** button to return to the Task Scheduler.
14. Select the **Task Scheduler Library** folder in the left-hand panel. The new task is displayed in the list of scheduled tasks.

Checking the Scheduled Task Details - Windows 7, 8, 8.1 and 10

1. On the **Task Scheduler** page, locate the `ArchiveAttMarks` task in the `Active Tasks` panel (located at the bottom of the page).

2. Double-click the `ArchiveAttMarks` task to view the **Task Scheduler Library**.

3. In the top panel, ensure that the `ArchiveAttMarks` task is highlighted.

    The task details are displayed in the bottom panel.

4. Double-click the `ArchiveAttMarks` task name (located in the top panel) to display the **ArchiveAttMarks Properties** dialog, where the task settings can be viewed/edited.

5. Click the **OK** button to save any changes and return to the **Task Scheduler** page.

    More Information:
    Accessing the Task Scheduler on page *117*

Clearing the Scheduled Task Event Log - Windows 7, 8, 8.1 and 10

The task scheduler stores the tracked events for each task in the Microsoft® Windows® 7 task scheduler event log. If the scheduled task fails to run it could be that the event log is full. If this is the case, all event log entries must be cleared before attempting to run the scheduled task again.

1. Click the Windows **Start** button to display the **Start menu**.

2. Enter `Eventvwr.msc` in the search field then press **Enter** to display the **Event Viewer**.

3. In the left-hand panel, navigate to **Event Viewer (Local) | Applications and Services Logs | Microsoft | Windows | Task Scheduler | Operational**.

4. Right-click **Operational** then select **Clear log**.
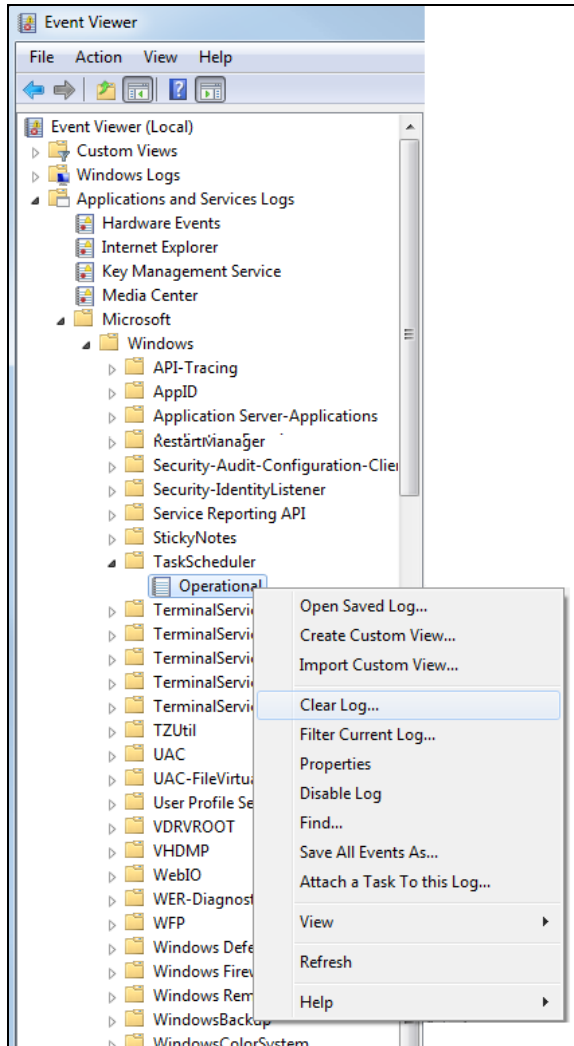
The **Event Viewer** dialog is displayed. You can save the contents of the event log before clearing it, if required.
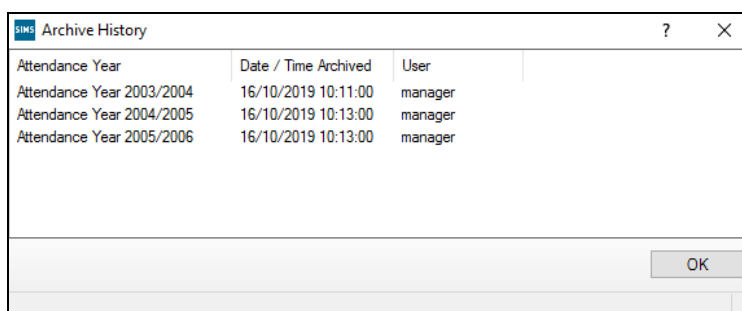
5. Click the **Save and Clear**, **Clear** or **Cancel** button, as required.

6. Close the event log and then restart the archiving process, if required.

Viewing the Archive History Log

The SIMS **Archive History** log can be used to view a list of archived attendance years. The log lists the **Attendance Year**(s) archived, the **Date/Time Archived** and the name of the **User** who set up the scheduled task.

1. In SIMS, select **Tools | Housekeeping | Achieve Attendance Marks | View Achieve History** to display the **Archive History** dialog.

   Displayed are the Attendance Year(s) that have been archived, the date and time that the marks were archived, and the **User** (system manager) who performed the archive process.

2. Click the **OK** button.

07| Producing Standard Attendance Letters

Introduction to the Attendance Letters Routine

There is often the need to produce standard documents associated with attendance, such as letters requesting an explanation for absence or certificates rewarded for good attendance. In SIMS, these documents are referred to as Attendance Letters.

The Letters routine enables this type of document to be created, edited and printed. Any letter templates that have been defined by your LA can be imported into SIMS using the import routine.

The Letters Created report can be generated to provides a list of the letter recipient and the associated letter details, e.g. the date created.

Defining a New Letter Template

Letter templates are usually defined and managed by the Attendance Manager.

When a letter is defined, you are in fact creating the template for that letter. You can define as many letter templates as required and these letter templates can be subsequently edited and deleted.

Each template must have a unique name and must be associated with one of the following predefined Letter Types:

- **Chosen Code**
  Letters stating the number of recorded marks for a specified code.

- **Lates**
  Letters concerning a student who is frequently late.

- **Percentage Attendance**
  Letters giving a percentage level of attendance.

- **Unexplained Absence**
  Letters for requesting reasons for unexplained absences.

- **Continuous Absence**
  Letters asking for an explanation of why a student is still absent.

The letter type selected determines which print options are available when the attendance Letters are printed.

1. Select **Tools | Setups | Attendance Setup | Letter Definition** to display the **Define Letters** dialog.
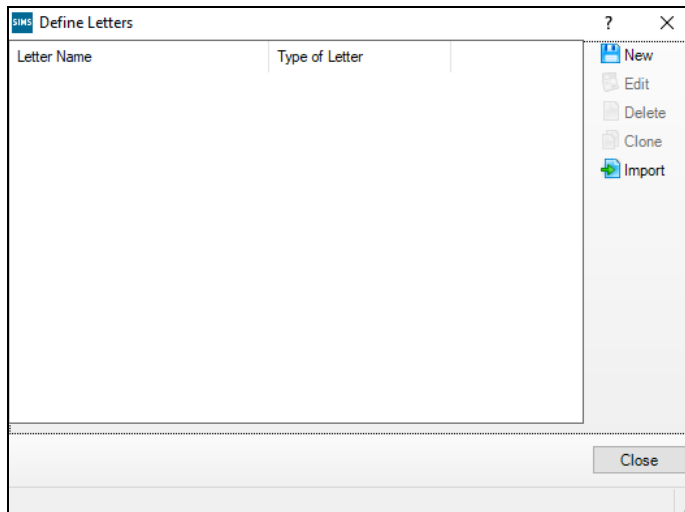
2. Click the **New** button to display the **Add Letter** dialog.
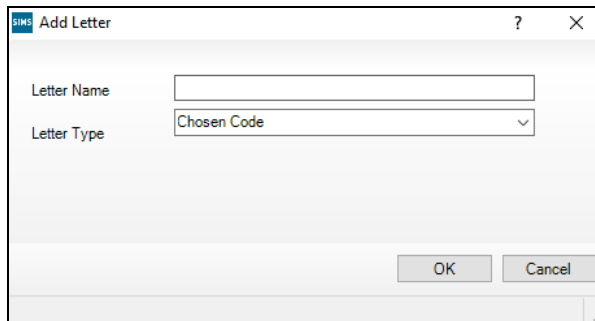
3. Enter the **Letter Name**. If it is not unique you will be prompted to enter an alternative name.

4. Select the appropriate **Letter Type** from the drop-down list.
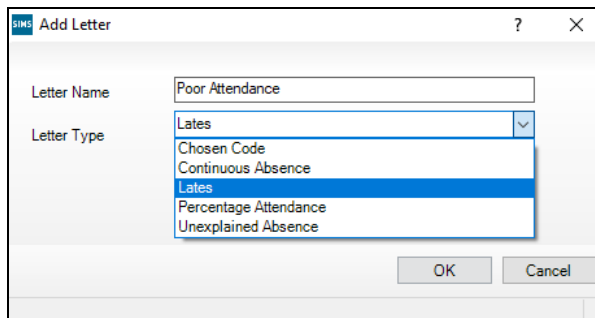
5. Click the **OK** button to launch Microsoft® Word and display a blank document.

6. Enter the required text and insert the required SIMS database merge fields by selecting from the drop-down list accessed via the Word toolbar.

SIMS Database Fields	
date_of_printing	his_her
addressee	His_Her
address_block	son_daughter
salutation	periods_of_absence
Chosen_forename	total_unexplained_absence
Chosen_surname	total_unexplained_sessions
forename	total_lates_before
surname	total_lates_after
full_name	total_lates_both
Chosen_name	dates_of_lates_before
date_of_birth	dates_of_lates_after
admission_number	dates_of_lates_both
Year	total_of_specified_codes
Reg	dates_of_specified_codes
Year_reg	total_possible
head_of_year	percentage_attendance
Tutor	total_continuous_absence
House	continuously_absent_since
he_she	total_authorised_absences
He_She	percentage_authorised_absences
Him_her	percentage_unauthorised_absences

The Welsh equivalent of some database fields is provided for use by schools that normally correspond with the parent/guardian in Welsh. To use this option, ensure that the **Use Welsh** check box has been selected via **Tools | Setups | Attendance Setup | Module Setup**.

Welsh Database Fields
ef_hi
Ef_Hi
mab_merch
absencesW
Dyddiadau_absenoldeb_heb_eglurhad
Dyddiadaun_hwyr_cyn_cofrestru
Dyddiadaun_hwyrach_na_chofrestru
Dyddiadaun_hwyr_cyn_neun_hwyrach
Dyddiadaur_codau_a_ddewiswyd

> *NOTE: Standard Word fields are also available via the toolbar.*

7. Ensure the cursor is in the required location, highlight the required merge field, then click the **Insert** button to insert it into the document. The merge fields are displayed in sets of angled brackets, e.g. `<<address block>>`.

   The following is an example of a letter template associated with the letter type **Lates**.

«address_block»

Dear «salutation»
Your «son_daughter» was late on numerous occasions during the month of June.
A total of «total_lates_both» instances were recorded.
We would appreciate if you could contact «chosen_name»'s teacher, «tutor», as soon as possible to discuss this matter.

Thank you for your co-operation.
Yours sincerely

G Goode
Deputy Head

Teacher: «tutor»
Name: «forename» «surname»
Admission Number: «admission_no»
Year/Registration Group: «year_reg»

Late arrival was recorded between «periods_of_absence»

Signature:
_____
«salutation»

            Date:
            _____

8. When complete, select **File | Save** to save the template in `C:\SIMS\Attend\Templates` (*where C: denotes your local drive*).

   For guidance on navigating to files on your local workstation when you are working in a <u>Hosted</u> environment, please contact your System Manager or local Support.

9. Close the Word document.

10. The new template is displayed in the **Define Letters** dialog (**Tools | Setups | Attendance Setup | Letter Definition**), together with any other defined letters.
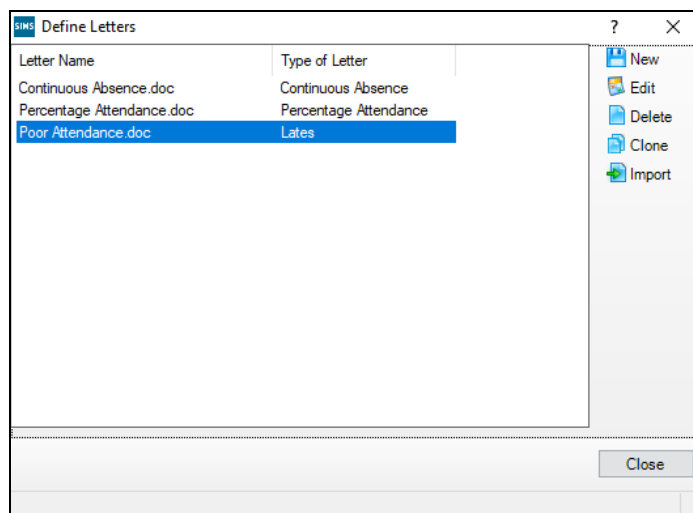
Editing Letter Templates

The content of a letter template can be edited at any time.

*NOTE: The **Type of Letter** cannot be changed. To use the same letter content for a different letter type, the cloning routine should be used.*

1. Select **Tools | Setups | Attendance Setup | Letter Definition** to display the **Define Letters** dialog.
2. Highlight the letter to be edited, then click the **Edit** button to display the selected letter in Word.
3. Edit the details of the letter, then save the edited letter template and exit Word.

Deleting Letter Templates

1. Select **Tools | Setups | Attendance Setup | Letter Definition** to display the **Define Letters** dialog.
2. Highlight the letter to be deleted. One letter only can be deleted at a time.
3. Click the **Delete** button to display a warning message:

   Are you sure you want to delete <letter name>?
4. Click the **Yes** button, if you want to complete the deletion process.

Cloning a Letter Template

Where an existing letter template is similar to the one you want to produce, the original letter template can be cloned. It is essential that a unique name is entered for the new letter template.

When cloned, the type of letter and the content of the letter template can then be edited.

1. Select **Tools | Setups | Attendance Setup | Letter Definition** to display the **Define Letters** dialog.
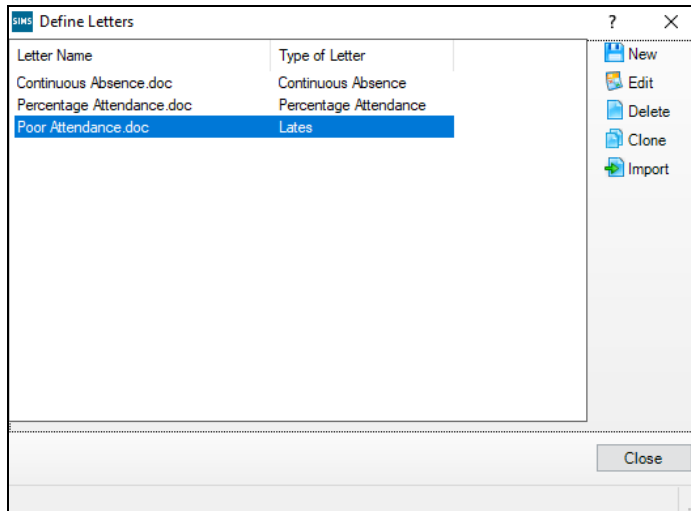
2. Highlight the letter template to be cloned, then click the **Clone** button to display the **Copy letter from** dialog.
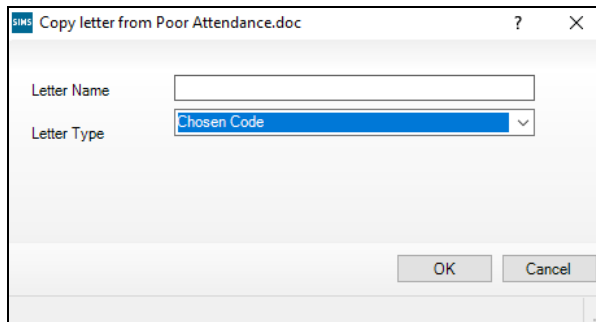
3. Enter a new **Letter Name**. If it is not unique, you will be prompted to enter an alternative name.

4. Select the **Letter Type** from the drop-down list.

5. Click the **OK** button to open the cloned letter template in Microsoft® Word.

6. Edit the template content as required.

7. Save the new letter template, then exit Microsoft Word.

Importing Letter Templates

The following routine can be used to import letter templates that have been defined by your LA. Using predefined letter templates helps to ensures consistency with the way in which attendance is managed.

The details of the letter template that has been selected for import, i.e. letter name and type of letter, can be amended in order for a new letter template to be defined. This is particularly useful if the new letter template is to have a similar content to the one selected. This cloning procedure is performed as part of the import process.

1. Select **Tools | Setups | Attendance Setup | Letter Definition** to display the **Define Letters** dialog.
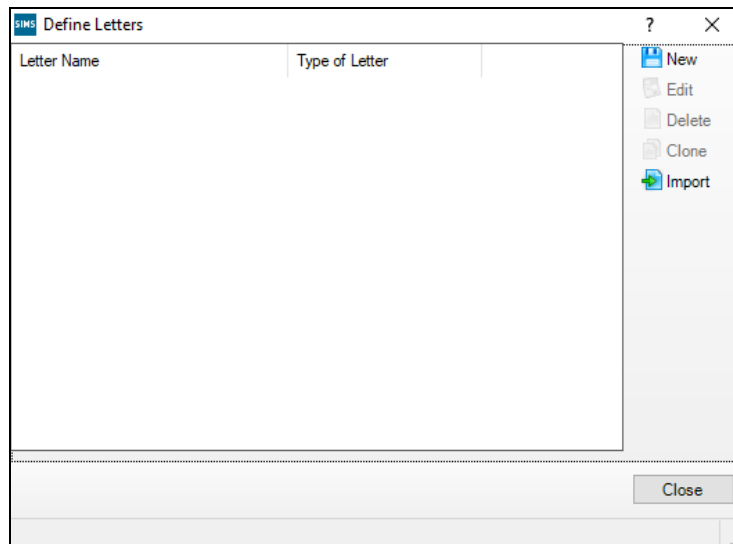
2. Click the **Import** button to display the **Import Letters** dialog.
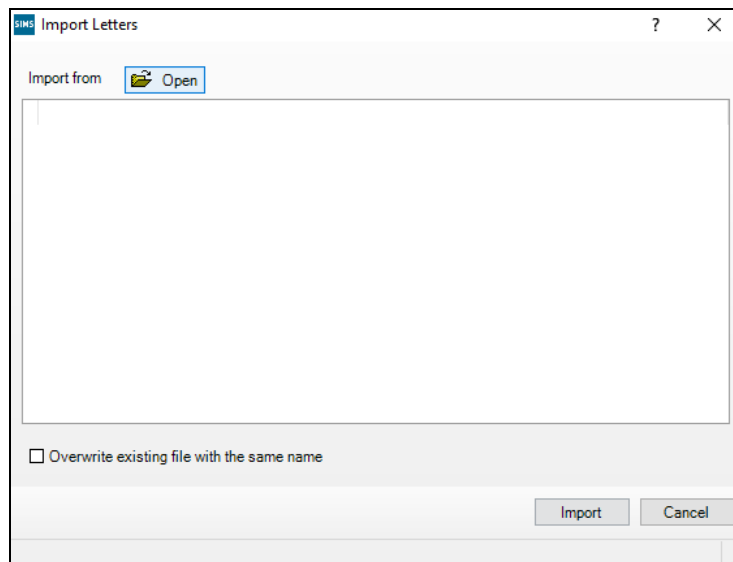
3. Click the **Open** button to display the **Select letter template/s to import** dialog.
4. Navigate to the location of the letter templates to be imported.

5. Highlight the required file(s), then click the **Open** button to return to the **Import Letters** dialog, where the selected letter template(s) are displayed.
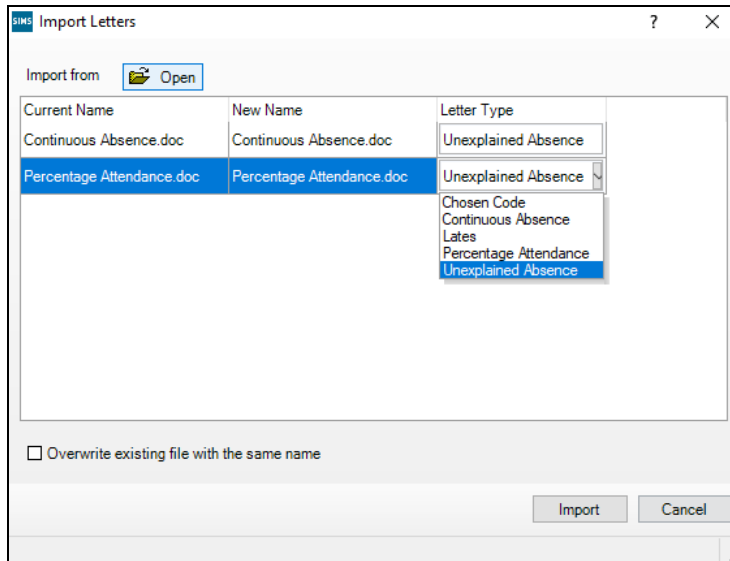
6. The file name and/or letter type of a selected file can be edited to create a cloned letter template, if required.

   a. To edit the letter template file name, click the **New Name** cell, then edit the existing name. A check is performed to ensure that the new file name does not already exist.

      To overwrite an existing file with the imported file of the same name, select the **Overwrite existing file with the same name** check box (located at the bottom-left of the dialog).

   b. To change the **Letter Type**, click the cell, then select the appropriate type from the drop-down list.

7. Click the **Import** button to import the selected file and return to the **Define Letters** dialog. The imported files are automatically saved in `C:\SIMS\Attend\Templates` (where `C:` denotes your local drive).
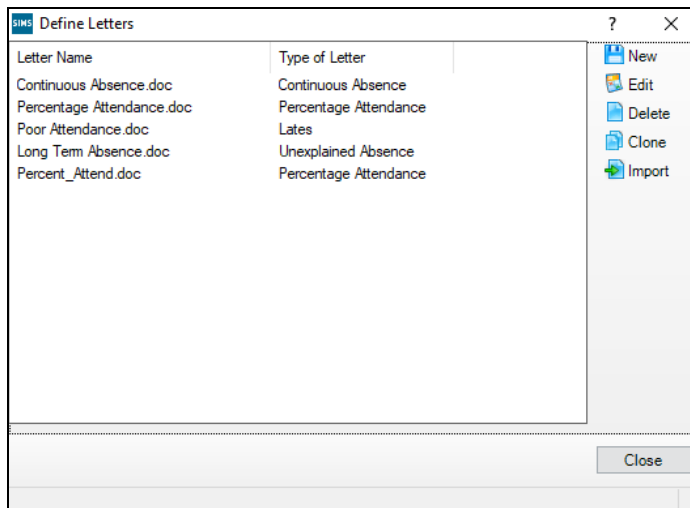
Defining a Generic Letter Template

Headed paper can be used when printing letters. However, an alternative is to create a generic letter template that contains generic information such as the school name and address.

> *NOTE: The school logo can also be included. However, inserting any graphic is likely to slow down the mail merge process.*

The generic letter template should have the file name `AttendanceLetter.doc` and be saved to the `\Sims\Attend\Templates` folder where the other attendance letter templates reside.

1. Open Microsoft® Word and define the content for the generic letter, for example: insert the school logo and enter the school address in the header.

2. Save the letter as `AttendanceLetter.doc` to the following location:

   `C:\SIMS\Attend\Templates` (where `C:` denotes your local drive). For guidance on navigating to files on your local workstation when you are working in a <u>Hosted</u> environment, please contact your System Manager or local Support.

3. Close the Word document and return to SIMS.

4. Select **Tools | Setups | Attendance Setup | Letter Definition** to display the **Define Letters** dialog.
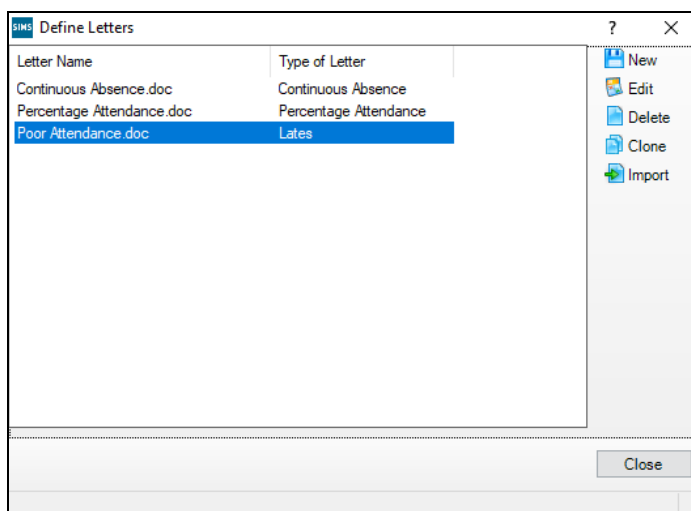
5. Click the **Import** button to display the **Import Letters** dialog.

6. Click the **Open** button to display the **Select letter template/s to import** dialog and then navigate to `C:\SIMS\Attend\Templates` (where `C:` denotes your local drive).

7. Highlight the `AttendanceLetters.doc` file, then click the **Open** button to return to the **Import Letters** dialog.

8. Click the **New Name** cell, then enter the name of the generic letter template you are about to create.

9. To overwrite an existing file that has the same name as you have just defined, select the **Overwrite existing file with the same name** check box (located at the bottom-left of the dialog).

10. To change the **Letter Type**, click the cell and select the appropriate type from the drop-down list.

11. Click the **Import** button to return to the **Define Letters** dialog where the new letter template record is displayed.

    By default, the imported file is saved in `C:\Sims\Attend\Templates` (where `C:` denotes your local drive).

12. Highlight the newly imported letter template, then click the **Edit** button to launch Word, where the content of the new letter template can be added.

More Information:
Deleting Letter Templates on page *131*

Printing Attendance Letters

Attendance Letters can be printed and edited by the Attendance Manager, Attendance Operator and Registration Tutor/Class Teacher.

When a letter template has been created, Microsoft® Word can be used to merge the letter template with the details of the selected pupil/students. The letter can then be saved and printed before attaching it to the appropriate pupil/student's record via the Document Management Server (DMS).

1. Select **Reports | Attendance | Letters | Print Letters** to display the **Print Letters** browser.
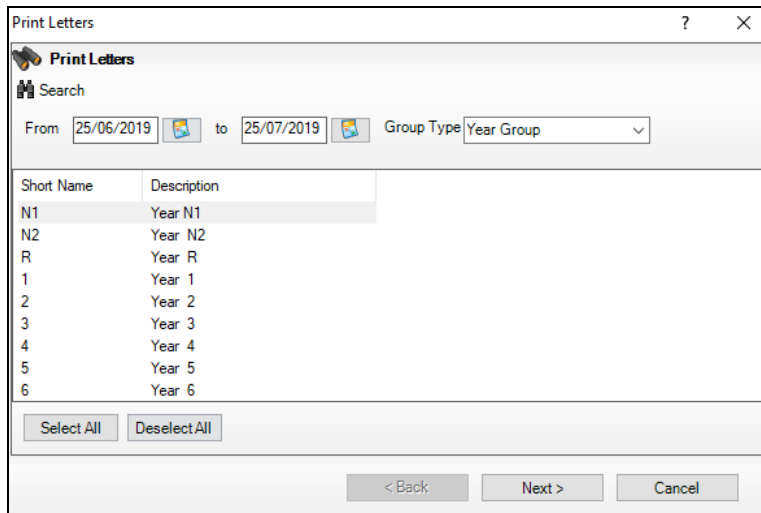
2. A default date range of 'from one month ago to yesterday' is displayed. If a different date range is required, enter the appropriate dates in the **From** and **to** fields or click the associated **Calendar** buttons and select the required dates.

    Calendar button

IMPORTANT NOTE: *The **From** and **to** dates must fall within the same academic year.*

3. By default, the **Group Type** is displayed as **Year Group**. If a different **Group Type** is required, select the required group from the drop-down list, then click the **Search** button to refresh the display.

4. Highlight the required group name(s), then click the **Next** button to display the **Print Letters** dialog, from where each selected letter criteria can be specified.

5. From the list of **Letters Available**, highlight the name of the letter to be printed.

6. The options in the right-hand panel vary depending on the **Type of Letter** selected:

   ▪ **Chosen Code**

   Indicate the code(s) to be included in the report by selecting the required check box(es).

   Include pupil/students with the following number of marks:

   ▪ **Any**

   ▪ **At Least**

   ▪ **Less Than**

   Select the appropriate radio button and enter the required number of marks.

- **Lates**

  Select the radio button representing the **Marks to check**:
  - **Late Before Registration Closed**
  - **Late After Registration Closed**
  - **Both Late Before and After**

  Include pupil/students with the following number of marks:
  - **Any**
  - **At Least**
  - **Less Than**

  Select the appropriate radio button and enter the required number of marks.

- **Percentage Attendance**

  Include pupil/students with the following percentage attendance:
  - **At Least**
  - **Less Than**
  - **Between < > and < >**

  Select the appropriate radio button and enter the required percentage.

- **Unexplained Absence**

  Include pupil/students with the following number of unexplained absences:
  - **Any**
  - **At Least**

Select the appropriate radio button and enter the required number of marks.

- **Continuous Absence**

    Include pupil/students who are currently absent and have been absent without explanation for the following number of sessions:

    Enter the required number of sessions in the **At Least** field, e.g. `10`.

7. Select the required **Output Option**:

    - **Preview in Word**

        Select the **Preview in Word** radio button, then click the **Print** button to open in Microsoft® Word, where the merged letters can be viewed.

        > *NOTE: At the same time that Microsoft Word is opened, the **Attach Letters** dialog is displayed in SIMS. After the merged letters are edited and saved, the letters can be attached to the applicable pupil/student record, if required (please see* Attaching Letters to the Document Management Server *on page* 140*).*

    - **Produce data file only (CSV format)**

        Select the **Produce data file only (CSV format)** radio button to produce a file, which can be mail merged in a word processing package other than Microsoft® Word.

        a. Click the **Print** button to display the **Save As** dialog.

        b. Enter a **File name** and path of your choice, then click the **Save** button.

8. Edit the individual letters, if necessary.

    The letters are displayed in group order (if more than one group has been selected) then ordered by pupil/student surname, then forename within the groups.

9. Save the letters to your preferred location. By default, the letters are automatically saved to `C:\Documents and Settings\My Documents\My SIMS Documents`. However, an alternative location can be specified, if required. For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or local Support.

10. Print the letters from Word in the usual way.

11. The **Attach Letters** dialog (displayed in SIMS) can now be used to attach the current letter to the pupil/students' records.

Monday, July 4, 2019

Mr F and Mrs R Abbot
22 West View
Rainham
EAST TOWN
Eastshire
SI5 9LR

Dear Mr and Mrs Abbot
Your son was late on numerous occasions during the month of March.
A total of 9 instances were recorded.

We would appreciate if you could contact Ben's teacher, Dr J. LEBON, as soon as possible to discuss this matter.

Thank you for your co-operation.
Yours sincerely

G Goode
Deputy Head

Teacher: Dr J. LEBON
Name: Ben ABBOT
Admission Number: 1511
Year/Registration Group: 4 ELM

Late arrival was recorded between Mon 06/06/19 AM - Wed 06/07/19 PM
Thu 06/06/19 AM - Fri 07/06/19 AM
Fri 21/06/19 AM - Fri 21/06/19 PM
Thu 04/07/19 AM - Fri 05/07/19 PM

Signature: _____
Mr and Mrs Abbot

Date: _____

Attaching Letters to the Document Management Server

Letters can be attached to (i.e. stored in) the Document Management Server (DMS) and linked to a pupil/student's record for future reference. This dispenses with the need to file large amounts of paperwork and makes retrieving information both quick and efficient.

During the Print Letters routine, the **Attach Letters** dialog is displayed in SIMS at the same time that Microsoft® Word is launched to enable letters to be printed.

1. Minimise or close Word and return to SIMS, where the **Attach Letters** dialog is displayed.

2. Indicate which pupil/student's record you wish the letter to be attached to by selecting the appropriate check box(es). The **Check All** and **Uncheck All** buttons can be used to assist with the selection, if required.
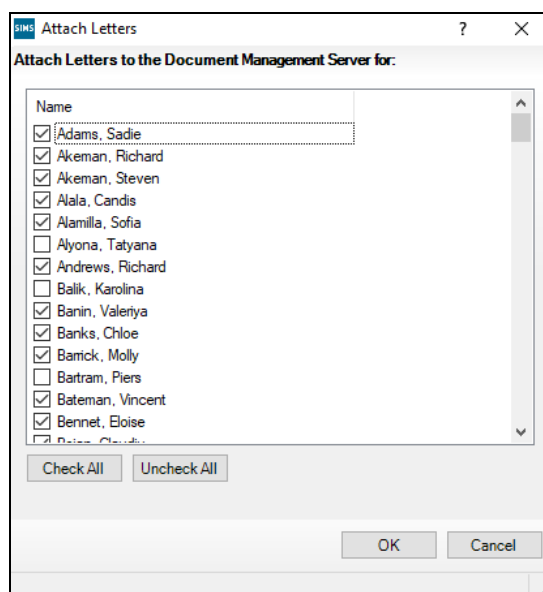
3. Click the **Attach** button to attach the letters to the DMS and link the letters to the pupil/student's record.

   When the letters are attached, the **Attach Letters** dialog closes and the **Print Letters** dialog is displayed.

4. Click the **Cancel** button to complete the process. Alternatively, click the **Print** button to launch Word where the letters can be printed.

5. Linked documents can be viewed and deleted via the individual pupil/student's record. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**, select the required pupil/student then select **Linked Documents** from the **Links** panel or drop-down list.

Additional Resources:

Managing Pupil/Students handbook

More Information:
Printing Attendance Letters on page *136*

Producing a Letters Created Report

There is often the need to produce standard documents associated with attendance, such as letters requesting an explanation for absence or certificates rewarded for good attendance. In SIMS, these documents are referred to as Attendance Letters.

The Letters Created report is based on the date that the letter was created, i.e. attached to the pupil/student record then stored in the Document Management Server (DMS). It shows all attendance letters produced for the selected group type during the specified date range.

The report shows the pupil/student's name, registration group, the date the letter was created, the name of the letter and the letter type, e.g. percentage attendance.

1. Select **Reports | Attendance | Letters | Letters Created Report** to display the **Letters Created Report** browser.

2. A default date range of from one month ago to yesterday is displayed. If a different date range is required, enter the appropriate dates in the **From** and **to** fields or click the **Calendar** buttons and select the required dates.

   Calendar button

3. By default, the **Group Type** is displayed as **Year Group**. If this is appropriate for the report, proceed to step *5*.

4. If a different **Group Type** is required, select the required group from the drop-down list then click the **Search** button to refresh the display.

5. A default **Title** (i.e. `Letters Created`) is displayed, which can be edited if required.

6. Indicate the order in which the report data is to be displayed by selecting either the **Student Name** or the **Letter** radio button.

7. Double-click the required group name, e.g. `2`, or highlight the required group names, then click the **Print** button to display the **Run a Screen Based Report** dialog.

   To select more than one group, hold down the **Ctrl** key and click the required group names to highlight them. The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the browser) can also be used, if required.

8. Select the required print criteria and click the **OK** button to produce the report.

More Information:
Running a Screen Based Report on page *155*
Selecting a Group Type on page *157*
Removing Items from the Report Header/Footer on page *158*

08| Printing Manual Entry Sheets

Printing Manual Registers

The manual registration sheet should be printed on plain paper.

Typically, the register is printed weekly and distributed to the appropriate registration tutor or left in the office for collection.

To assist office staff when entering data in SIMS Attendance, the sheet layout has been designed to match the screen display. For example, pupil/students on-roll in the week specified are displayed in the same order as they appear on screen.

There may be an occasion when a pupil/student has, for example, joined after the registration sheet was printed. In this case you will need to manually add a line on the sheet to enable the pupil/student's attendance to be recorded. The pupil/student should be added permanently to a registration group and their details entered in SIMS at the earliest opportunity.

1. Select **Reports | Attendance | Manual Entry | Print Registration Sheet** to display the **Manual Entry Register** browser.

2. A default date range of 'school week beginning next Monday to school week beginning next Monday' is displayed. If a different date range is required, enter the appropriate week beginning dates in the **From w/b** and **to w/b** fields or click the **Calendar** buttons and select the required dates.

3. By default, the **Group Type** is displayed as **Reg Group**. If a different **Group Type** is required, select from the drop-down list then click the **Search** button to refresh the display.

4. A default **Title** (i.e. `Manual Entry Register`) is displayed. The title can be edited if required.

5. One or more of the optional check boxes can be selected, if required:

   ▪ **Include Accepted Applicants**
   This option enables pre-admission pupil/students to be included on the registration sheet. However, you should be aware that because the registration sheets are usually printed in advance, it is likely that the pupil/students will be on-roll by the time the data is transferred from the manual registration sheet to SIMS (via **Focus | Attendance | Edit Marks**).

   ▪ **Include Existing Marks**
   This option is selected by default. Any marks already entered in SIMS, e.g. doctors' appointments, agreed family holiday, school trips, etc. for the selected date range are included when the manual register is printed. De-select the check box if not required.

   ▪ **Display Attendance Codes**
   This option prints a **Key to Codes** at the bottom of each selected manual register.

6. Double-click the required group name, e.g. `2GH` to display the **Run a Screen Based Report** dialog or highlight the required group names then click the **Print** button.

   To select more than one group, hold down the **Ctrl** key and click the required group names to highlight them.

   The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the browser) can also be used, if required.

7. Select the required print criteria and click the **OK** button to display the report in your web browser.

Manual Entry Register

Reg Group 2GH

Mrs G Grosvenor

n/a

Week Beginning 06/03/2017

Name	Reg	Mon 06/03 AM	PM	Tue 07/03 AM	PM	Wed 08/03 AM	PM	Thu 09/03 AM	PM	Fri 10/03 AM	PM	Sat 11/03 AM	PM	Sun 12/03 AM	PM
Abhra, Neel	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Ackton, Stan	2GH	U	\	/	\	/	L	U	\	/	\	#	#	#	#
Andrews, Josef	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Balinski, Iwa	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Bennison, Hugo	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Bennison, Hugo	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Carlson, Billy	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Clapson, William	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Constantinou, Jonny	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
DiCalvi, Pasquale	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
DiMichele, Sara	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Ebi, Danesh	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Enlai, Cheng	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Gowda, Biji	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Gray, Lara	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Hassan, Giv	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Henderson, Jack	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Ludmitas, Klara	2GH	/	\	/	\	N	N	N	N	N	N	#	#	#	#
Machowski, Dawid	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Mattson, Ethan	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
McKenzie, Joshua	2GH	/	\	/	\	/	\	/	\	T	T	#	#	#	#
Miller, Harvey	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Parker, Henry	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Parr, Bethany	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Phillips, Emma	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Plavsic, Dragoslav	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Selby, Izzie	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Stevens, Thomas	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Wade, Alice	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Watts, Kimberley	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#
Williams, Eloise	2GH	/	\	/	\	/	\	/	\	/	\	#	#	#	#

More Information:
Edit Marks Routine on page *63*
Running a Screen Based Report on page *155*

Printing Manual Absence Sheets

The manual absence sheet should be printed on plain paper.

Listed in the report are the names of the relevant pupil/students and their dates of absence. A list of absence codes and their meanings is displayed at the bottom of the report.

Missing marks are also included in the report provided that the **Absence sheets to include pupils with missing marks** option has been selected via **Tools | Setup | Attendance Setup | Module Setup**.

1. Select **Reports | Attendance | Manual Entry | Print Absence Sheet** to display the **Manual Absence Sheet** browser.

2. A default date range of 'school week beginning next Monday to school week beginning next Monday' is displayed. If a different date range is required, enter the appropriate week beginning dates in the **From w/b** and **to w/b** fields or click the Calendar buttons and select the required dates.

    Calendar button

3. By default, the **Group Type** is displayed as **Reg Group**. If a different **Group Type** is required, select from the drop-down list then click the **Search** button to refresh the display.

4. A default **Title** (i.e. `Manual Absence Sheet`) is displayed. The title can be edited if required.

5. Select the required **Number of sessions per line** by selecting the appropriate radio button:
   - **Multiple sessions**
     (several sessions of continuous absence e.g. Tues PM to Thur AM)
   - **Single sessions**

6. Double-click the required group name, e.g. `ELM`, `4ES`, etc., to display the **Run a Screen Based Report** dialog or highlight the required group names then click the **Print** button.

   To select more than one group, hold down the **Ctrl** key then click the required group names to highlight them.

   The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the browser) can be used to assist with the selection, if required.

7. Select the required print criteria then click the **OK** button to display the report in your web browser.

Manual Absence Sheet

Reg Group ELM

Mr R Perrin

n/a

Printed on 02/03/2017 at 12:26

Name	Reg	From	To	Mark
Akeman, Richard	ELM	07/03/2017 AM	07/03/2017 PM	
Akeman, Steven	ELM	07/03/2017 AM	07/03/2017 PM	
Kienan, Henry	ELM	08/03/2017 AM	10/03/2017 PM	

	Key to codes				
/	Present (AM)	J	Interview	U	Late (after registers closed)
\	Present (PM)	L	Late (before registers closed)	V	Educational visit or trip
B	Educated off site (not Dual reg.)	M	Medical/Dental appointments	W	Work experience
C	Other authorised circumstances	N	No reason yet provided for absence	#	Planned whole or partial school closure
D	Dual registration	O	Unauthorised Abs	Y	Unable to attend due to exceptional circumstances
E	Excluded	P	Approved sporting activity	X	DfES X: Non-compulsory school age abs
G	Family Holiday (not agreed)	R	Religious observance	Z	Pupil not on roll
H	Family holiday (agreed)	S	Study leave	-	All should attend / No mark recorded
I	Illness	T	Traveller absence		

More Information:
Including Missing Marks on Manual Absence Sheets on page *9*
Edit Marks Routine on page *63*
Running a Screen Based Report on page *155*

09 | **Additional Information**

Attendance Codes

Session Registration Codes in England

The following session registration codes are used in England and are all non-editable.

Code	Brief Description	Statistical Meaning	Legal Meaning	Physical Meaning
**/ **	Present / = am \ = pm	Present	Present	In for whole session
B	Educated off site (NOT Dual registration)	Approved Educational Activity	Attending approved educational activity	Out for whole session
C	Other authorised circumstances (not covered by another appropriate code/description)	Authorised Absence	Absent	Out for whole session
D	Dual registration (attending other establishment)	Attendance not required	Attending approved educational activity	Out for whole session
E	Excluded (No alternative provision made)	Authorised Absence	Absent	Out for whole session
G	Family Holiday (NOT agreed <u>or</u> days in excess of agreement)	Unauthorised Absence	Absent	Out for whole session
H	Family Holiday (agreed)	Authorised Absence	Absent	Out for whole session

Code	Brief Description	Statistical Meaning	Legal Meaning	Physical Meaning
I	Illness (NOT medical or dental etc. appointments)	Authorised Absence	Absent	Out for whole session
J	Interview	Approved Educational Activity	Attending approved educational activity	Out for whole session
L	Late (before registration closed)	Present	Present	Late for session
M	Medical/Dental appointments	Authorised Absence	Absent	Out for whole session
N	No reason yet provided for absence	Unauthorised Absence	Absent	Out for whole session
O	Unauthorised Absence (not covered by any other code/description)	Unauthorised Absence	Absent	Out for whole session
P	Approved sporting activity	Approved Educational Activity	Attending approved educational activity	Out for whole session
R	Religious observance	Authorised Absence	Absent	Out for whole session
S	Study leave	Authorised Absence	Absent	Out for whole session
T	Traveller absence	Authorised Absence	Absent	Out for whole session
U	Late (after registration closed)	Unauthorised Absence	Absent	Late for session
V	Educational visit or trip	Approved Educational Activity	Attending approved educational activity	Out for whole session
W	Work experience	Approved Educational Activity	Attending approved educational activity	Out for whole session

Code	Brief Description	Statistical Meaning	Legal Meaning	Physical Meaning
X	Non-compulsory school-age absence	Not counted in possible attendances	Absent	Out for whole session
Y	Unable to attend due to exceptional circumstances	Not counted in possible attendances	Unable to attend due to exceptional circumstances or not attending because the pupil/students have a different school year to other pupil/students in the school.	Out for whole session
Z	Do not use	Authorised Absence	Pupil/student not registered at the school	Out for whole session
#	Planned whole or partial school closure	Not counted in possible attendances	No session held	Out for whole session

Session Registration Codes in Wales

The following session registration codes are used in Wales.

Code	English Description	Statistical Meaning	Physical Meaning
/	Present (AM)	present	in for whole session
****	Present (PM)	present	in for whole session
B	Educated off site.	approved educational activity	out for whole session
C	Other authorised circumstances.	authorised absence	out for whole session
D	Dual registration - Pupil/student attending another establishment including Traveller children who are attending another school at which they are registered.	attendance not required	out for whole session
E	Excluded from school.	authorised absence	out for whole session

Code	English Description	Statistical Meaning	Physical Meaning
F	Agreed extended family holiday (over 10 days).	authorised absence	out for whole session
G	Family holiday (not agreed or days in excess of agreement).	unauthorised absence	out for whole session
H	Agreed family holiday (up to 10 days).	authorised absence	out for whole session
I	Illness	authorised absence	out for whole session
J	Interview	approved educational activity	out for whole session
L	Late (before registers closed).	present	late for session
M	Medical or Dental appointment.	authorised absence	out for whole session
N	No reason yet provided for absence.	unauthorised absence	out for whole session
O	Any absence with no satisfactory explanation, in the school's view, provided.	unauthorised absence	out for whole session
P	Sporting activity.	approved educational activity	out for whole session
R	Religious observance.	authorised absence	out for whole session
S	Study leave.	authorised absence	out for whole session
T	Traveller absence.	authorised absence	out for whole session
U	Late arrival (after close of registration).	unauthorised absence	late for session
V	Educational visit or trip.	approved educational activity	out for whole session
W	Work experience.	approved educational activity	out for whole session

Code	English Description	Statistical Meaning	Physical Meaning
X	Untimetabled sessions for non-compulsory school age pupil/students.	attendance not required	out for whole session
Y	Partial and enforced closure of the school.	attendance not required	out for whole session
Z	Pupil/students not yet on school roll.	attendance not required	out for whole session
#	School closed to all pupil/students – e.g. INSET days.	attendance not required	out for whole session
-	All should attend/no mark recorded.	no mark	no mark for session

Session Registration Codes in Northern Ireland

The following session registration codes are used in Northern Ireland and are all non-editable.

Code	Brief Description	Statistical Meaning	Physical Meaning
**/ **	Present / = (AM) \ = (PM)	Present	In for whole session
A	Artistic Endeavour	Present	In for whole session
B	Bereavement	Authorised Absence	Out for whole session
C	Suspended	Authorised Absence	Out for whole session
D	Did not provide a reason	Unauthorised Absence	Out for whole session
F	Family Holiday (agreed)	Authorised Absence	Out for whole session
G	Family Holiday (NOT agreed)	Unauthorised Absence	Out for whole session
H	Other Absence	Unauthorised Absence	Out for whole session
I	Illness (not medical or dental appointments)	Authorised Absence	Out for whole session

Code	Brief Description	Statistical Meaning	Physical Meaning
L	Late (before registration closed)	Present	Late for session
M	Medical/Dental appointments	Authorised Absence	Out for whole session
N	No reason yet provided for absence	Unauthorised Absence	Out for whole session
O	Other exceptional circumstances	Authorised Absence	Out for whole session
P	Approved sporting activity	Approved Educational Activity	Out for whole session
R	Religious observance	Authorised Absence	Out for whole session
S	Study leave	Approved Educational Activity	Out for whole session
U	Late (after registration closed)	Unauthorised Absence	Late for session
V	Educational Visit	Approved Educational Activity	Out for whole session
W	Work experience	Approved Educational Activity	Out for whole session
X	Only staff should attend	Attendance not required	Out for whole session
Y	Exceptional closure	Attendance not required	Not required to be in school
!	No attendance required	Attendance not required	Out for whole session
#	Holiday for all	Attendance not required	Out for whole session
*	Not on roll	Attendance not required	Out for whole session
-	All should attend/No mark recorded	No mark	No mark for session
1	AEP (ELB)	Approved Educational Activity	Out for whole session
2	Home/hospital tuition (ELB)	Approved Educational Activity	Out for whole session

Code	Brief Description	Statistical Meaning	Physical Meaning
3	Elective Home Education	Attendance not required	Out for whole session
4	Pupil Referral Unit	Approved Educational Activity	Out for whole session
5	Another mainstream school (EF)	Approved Educational Activity	Out for whole session
6	Training Organisation (EF)	Approved Educational Activity	Out for whole session
7	FE College (EF)	Approved Educational Activity	Out for whole session
8	Intensive Support Learning Unit	Approved Educational Activity	Out for whole session
9	CAMHS	Approved Educational Activity	Out for whole session

Running a Screen Based Report

The examples given here are based on the Display Marks routine. However, the process for running a screen based report is very similar in all routines.

1. Click the **Print** button to display the **Run a Screen Based Report** dialog.

2. The **Use a predefined layout** and **Output to a web browser** options are selected by default.
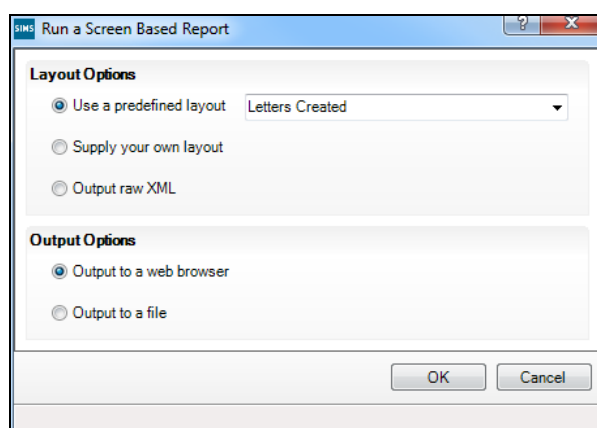
3. Specify the preferred layout option by selecting the appropriate radio button.

   - **Use a predefined layout**
     Select the required option from the drop-down list. The options displayed will vary depending on the functionality being used at the time, e.g. **Week View** and **Month View** will be displayed in the drop-down list, when using the Display Marks functionality.

- **Supply your own layout**
  This option is available for schools that prefer a report layout that is different to the default layout available in SIMS. Before selecting this option, an XSL file (recommended for the production of a printed output from XML) must have been created.

  Enter the location of the XSL file in the associated field.

  Alternatively, click the **Browser** button to display the **Select a Layout File** dialog. Navigate to and highlight the layout file and click the **Open** button to return to the **Run a Screen Based Report** dialog.

   Browser button
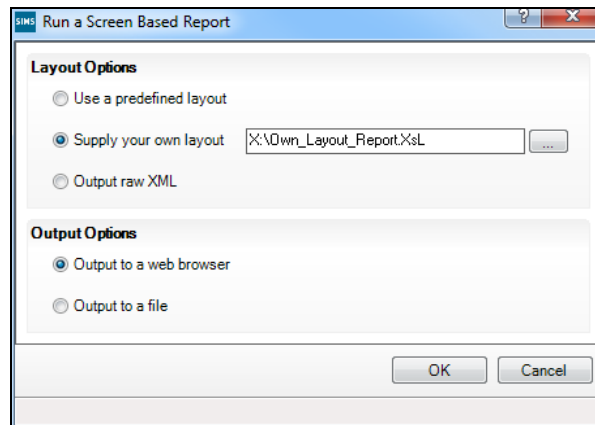
- **Output raw XML**
  This option outputs data that is stored in the SIMS database as raw XML data. This can then be imported into another application, e.g. Microsoft® XL, and formatted to the individual school's requirements.

4. Specify the preferred output option by selecting the appropriate radio button.

   - **Output to a web browser**
     The default option produces a report in HTML format and displays it in your default web browser.
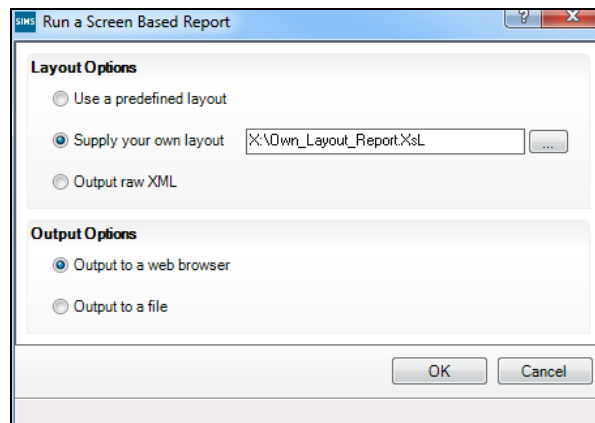
- **Output to a file**
  This option produces a report in XML format to the location specified.

  Enter the location where the .XML file should be saved.

  Alternatively, click the **Browser** button to display the **Save As** dialog. Navigate to the required location and enter a **File Name**. Click the **Save** button to return to the **Run a Screen Based Report** dialog.
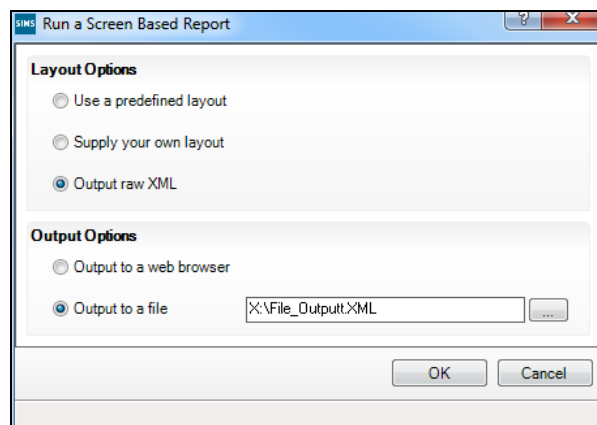
5. Click the **OK** button to produce the report.

Selecting a Group Type

Many routines provide the option to specify the group type. A default group type based on the most typically used group for that routine, is always displayed. However, the setting can be changed by selecting from the **Group Type** drop-down list.
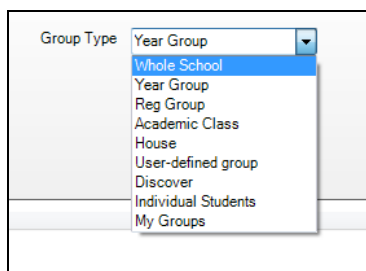
IMPORTANT NOTE: *If the* **Group Type** *is changed, the* **Search** *button* <u>*must*</u> *be clicked to refresh the display.*

The following options are available:

- **Whole School**
  Whole School Selected is displayed in the **Description** column in the browser. When the routine is run, data is returned for the whole school.

- **Year Group**
  The short name and description of each year group are displayed in the browser. When the routine is run, data is returned for the selected year group(s).

- **Reg Group**
  The short name and description of each registration group are displayed in the browser. When the routine is run, data is returned for the selected registration group(s).

- **Academic Class**
  The class name, class description, main teacher, subject, year group and national curriculum year, of each academic class are displayed in the browser.

- When the routine is run, data is returned for the selected item(s).

- **House**
  The short name and description of each house are displayed in the browser. When the routine is run, data is returned for the selected house(s).

- **User-defined Group**
  A short name and description of groups created via **Focus | Groups | User Defined Groups** are displayed in the browser. When the routine is run, data is returned for the selected User-defined group(s).

- **Discover**
  User-defined groups can be created in Discover for use in SIMS. When the routine is run, data is returned for the selected group(s).

- **Individual Student**
  The name, year group, registration group, house, gender and admission number of each on-roll pupil/student is displayed in the browser. When the routine is run, data is returned for the selected pupil/student(s).

- **My Groups**
  The short name, description and group type of any registration group, year group or academic class to which the user has been assigned is displayed in the browser. Any user defined group for which the user is a Supervisor is also displayed. When the routine is run, data is returned for the selected group(s).

Removing Items from the Report Header/Footer

Attendance 7 reports are produced in XML (eXtensibe Markup Language) and displayed in your default web browser, from where they can be printed.

The header and footer are set by the Page Setup routine in your browser.

Removing Page Numbers from the Report Header

To remove the page numbers from the report header using Internet Explorer, e.g. on an individual pupil/student report that is being sent home:

1. Select the required report criteria.
2. Click the **Print** button to display the **Run a Screen Based Report** dialog.
3. Ensure that the **Output to a web browser** radio button is selected, then click the **OK** button to display the report in Internet Explorer.
4. Select **File | Page Setup** and delete **Page &p of &P** from the **Header** field.
5. Select **File | Print** to print the report.

Removing the File Name from the Report Header

To remove the file name from the report footer using Internet Explorer, e.g. `file://C:\\Documents and Settings\\ablacker\\Local Settings\\Temp\\rpttmp.html`:

1. Select the required report criteria.
2. Click the **Print** button to display the **Run a Screen Based Report** dialog.
3. Ensure that the **Output to a web browser** radio button is selected, then click the **OK** button to display the report in Internet Explorer.
4. Select **File | Page Setup** and delete **&u** from the **Footer** field.
5. Select **File | Print** to print the report.

> *NOTE: For guidance on navigating to files on your local workstation when you are working in a <u>Hosted</u> environment, please contact your System Manager or local Support.*

Attendance Year Report

The ability to print a report detailing the Attendance year is no longer included with the Attendance reports. Instead a pre-defined report is available via the **Reports** menu. The report includes the start and finish dates for each term and half-term along with any planned occasional closure dates within the term dates.

1. Select **Reports | Run Report** to display the **Report** browser.
2. Select **Focus | Diary** from the navigation tree.
3. Select the **SEF A29 – Term Dates and closures** report from the right-hand list.
4. Enter the parameter values for the report, e.g. **Start date is between** `04 September 2019` **and** `04 September 2020`.
5. Click the **OK** button to generate the report.

Example of the report content:

Category	Event type	Start date	End date
Half-Term	Half-Term Holiday	21 October 2019	25 October 2019
Spring Term	Term	06 January 2020	03 April 2020
Half-Term	Half-Term Holiday	10 February 2020	14 February 2020
Summer Term	Term	21 April 2020	17 July 2020
Bank Holiday	Public Holiday	04 May 2020	04 May 2020
Half-Term	Half-Term Holiday	25 May 2020	29 May 2020

Additional Resources:

Designing and Running Reports handbook
SIMS Pre-Defined Reports Catalogue

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