

SIMS



Standard Reporting

UNCLASSIFIED

Course Code – SREP-1-05

Version 9.1

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Where appropriate for data entry purposes, the graphics used in this document match the training data recommended for use on the course. Where the graphic is an example of what might be expected when using certain areas of the software, the training data may not be an exact match.

Revision History

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	<h1 style="margin: 0;">Introduction</h1>
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Introduction

SIMS holds a vast amount of data which can be used to inform school improvement strategies and support a wide range of school management activities including processing statutory returns and maintaining GDPR compliance.

This course will guide you through the basics of the designing reports using tasks based on typical scenarios which arise daily within the school office.

Course Objectives

By the end of the course you will be able to:

- respond to requests for information
- produce lists of information
- produce mail merged address labels
- produce mail merged letters
- use preview and filtering and sorting effectively
- re-use and modify reports
- select an appropriate output format.

Overview

This course introduces you to the report designing process in SIMS with the objective of being able to extract useful information from the pupil database in a variety of formats.

The course will cover:

- the running of pre-defined reports (including GDPR requests)
- modifying and creating reports to produce lists
- creating reports to produce mail merged documents and labels, using Word and Excel
- using analysis output
- exporting and importing report definitions
- using the Favourites panel on the SIMS Home Page to run favourite Reports.

Throughout the course, tasks/activities will be related to scenarios aimed to equip you with the skills to respond to requests for pupil data needed from the software. These requests may come from sources within school or externally. This course will give you a clear understanding of how reports are produced in SIMS.

Course Requirements

You must be familiar with the day to day use of SIMS, the range of data which is stored within the database and how the data is entered and maintained. You may have attended other SIMS courses such as SIMS Office User and SIMS Office User – Further Skills.

01

Running Existing (Pre-defined) Reports

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Chapter Introduction

This chapter looks at logging into SIMS, explores the SIMS Home Page, Documentation Centre and also covers running pre-defined reports in Word or Excel.

Navigating the Menu

The menu across the top of the SIMS Home Page provides access to a range of actions.

Each of the menus provides access to further actions or sub-menus depending on access rights and permissions as well as changes over time because of developments in the software. What you see as you navigate the menu may therefore not be identical to what you see at school or in the examples displayed.

Reporting is carried out through two menu routes – **Reports | Run Report** and **Reports | Design Report**. You can also use the appropriate icons for running and designing reports. **Run Report** as its name implies enables you to run and preview reports. This option is often used by teachers in school to run reports that others have created. **Design Report** enables you to run, preview and design reports.

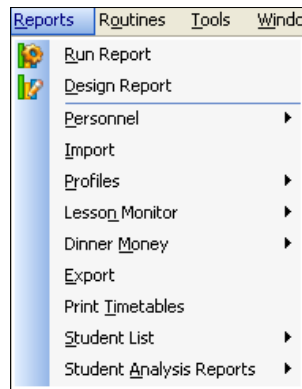
NOTE: Hovering over the icons on the quick launch toolbar will display their name.

Step by Step – Logging into SIMS

1. Log into SIMS by entering your **User Name** and **Password**.



- Run Report and Design Report are located under Reports.



You can also select Design Report or Run Report.



Design Report

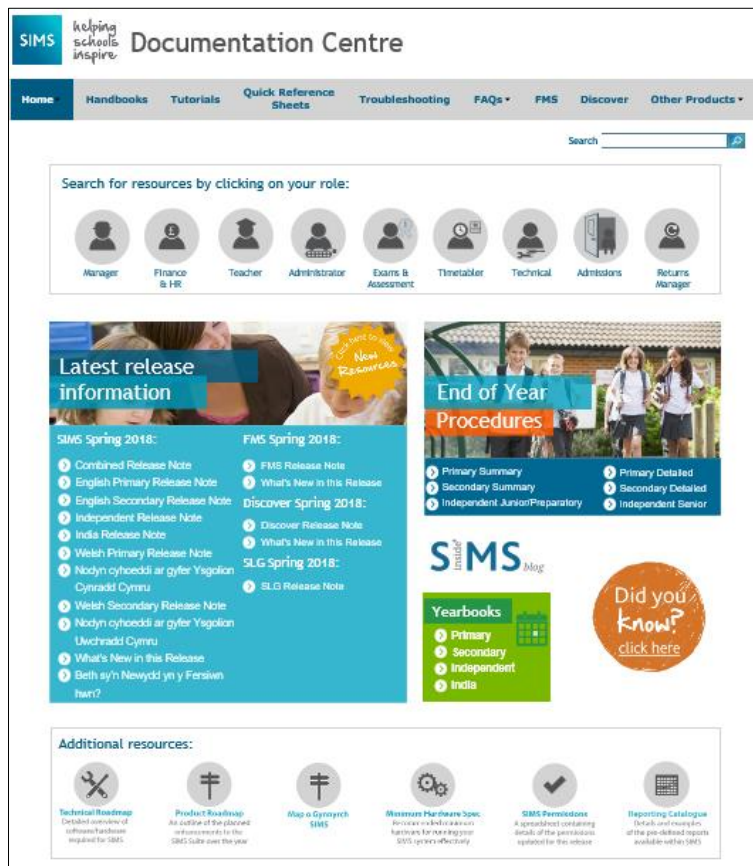


Run Report

Accessing Documentation

The Documentation Centre provides shortcuts to handbooks and other documentation. These are accessed by clicking **Documentation** which is located at the top right-hand side of the **SIMS Home Page**.

The Documentation Centre Home Page is displayed.



Resources can be accessed by clicking on your role or handbooks can be opened by clicking **Handbooks**. These provide additional information about using SIMS and other modules. The handbooks are opened using Adobe Reader and so this must be available on your computer. Handbooks can be browsed and printed in their entirety, or in sections, if required.

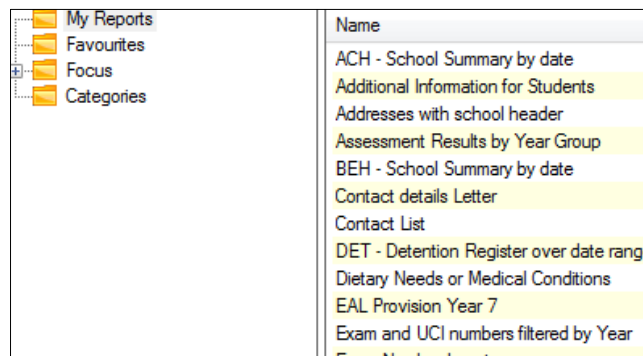
Activity – Finding the Reporting Catalogue

Locate the SIMS Pre-Defined Reports Catalogue within the Documentation Centre.

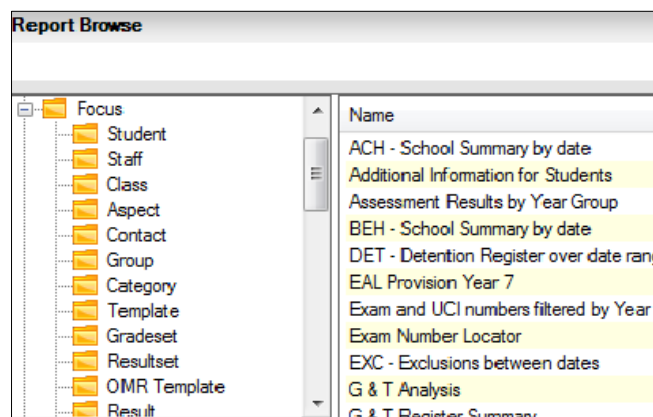
Step by Step – Running a Report with no Filters

SIMS comes with a number of reports already created. This step by step takes you through running these reports.

1. Click **Run Report** shortcut or select **Reports | Run Report**.
2. Notice the folders that are displayed:
 - The **My Reports** folder contains any reports that you have created and saved.
 - The **Favourites** folder contains any reports that are used often and have been deemed as a favourite. This will be examined later.
 - The **Categories** folder enables categories to be created by the school and reports placed within them.
 - The **Focus** folder has a small + next to it and contains all the pre-defined and created reports.



3. Click + next to the **Focus** folder; many other folders are now displayed.



4. Click each folder and notice that many of the folders contain a number of reports. The folder name tells you the focus of the reports held. Reports within the **Student Focus** folder list information about a pupil or number of pupils. The **Class Focus** folder contains reports that run on a class basis, for example, you provide the class name and the report lists the pupils who belong to that class.

- Click the **Student Focus** folder. The Supplier tells you who created the report. If the supplier is CES Reporting Services then the reports have been produced by Capita and may be in the Reporting Catalogue mentioned previously.

Name	Focus	Owner	Supplier	Updated	Category
ACH - School Summary by date	Student	Adrian Blacker	Green Abbey School	16/06/2009	Public
ACH - Year/Reg Group Summary, Dated	Student	Imported	Green Abbey School	31/07/2009	Public
Achievement by Type Report	Student	Imported	CES Reporting Services	22/06/2018	Public
Achievement Insert	Student	Imported	CES Reporting Services	22/06/2018	Public
Achievement Insert Report	Student	Imported	CES Reporting Services	22/06/2018	Public
Achievement Listing Report	Student	Imported	CES Reporting Services	22/06/2018	Public
Achievement Report by Type	Student	Imported	CES Reporting Services	22/06/2018	Public
Achievement Report Listing	Student	Imported	CES Reporting Services	22/06/2018	Public
Additional Information for Students	Student	Adrian Blacker	Green Abbey School	03/11/2011	Private
Address Labels - Parents	Student	Imported	CES Reporting Services	22/06/2018	Public
Address List (Grouped by Year Group)	Student	Imported	CES Reporting Services	22/06/2018	Public
Address List (With Parents)	Student	Imported	CES Reporting Services	17/11/2005	Public

- Scroll down the list of reports and select the **Medical Notes** report.
- Notice that near the top of the screen you can see that this report will output to a Word List Report. Word and Excel are the common forms of output, but there are other forms such as rich text format (RTF) and Analysis.

Name	Focus	Owner	Supplier	Updated	Category
Meal Arrangements	Student	Imported	CES Reporting Services	10/07/2019	Public
Meal List (Free Meals)	Student	Imported	CES Reporting Services	10/07/2019	Public
Medical Conditions	Student	Imported	CES Reporting Services	10/07/2019	Public
Medical Conditions & Contact Information	Student	Imported	CES Reporting Services	10/07/2019	Public
Medical Events Dated	Student	Imported	Green Abbey School	31/07/2009	Public
Medical Information (Specific)	Student	Imported	CES Reporting Services	10/07/2019	Public
Medical Notes	Student	Imported	CES Reporting Services	10/07/2019	Public
Medical Notes Dated	Student	Imported	Green Abbey School	31/07/2009	Public
Migration Report for Arrivals	Student	Imported	CES Reporting Services	10/07/2019	Public
Migration Report for Leavers	Student	Imported	CES Reporting Services	10/07/2019	Public
Missing UPN List	Student	Imported	CES Reporting Services	10/07/2019	Public
National Curriculum Year	Student	Imported	CES Reporting Services	10/07/2019	Public

- To run this report, double click the report name or click **Run** near the top of the screen. The report has produced a list of pupils with Medical Notes recorded.

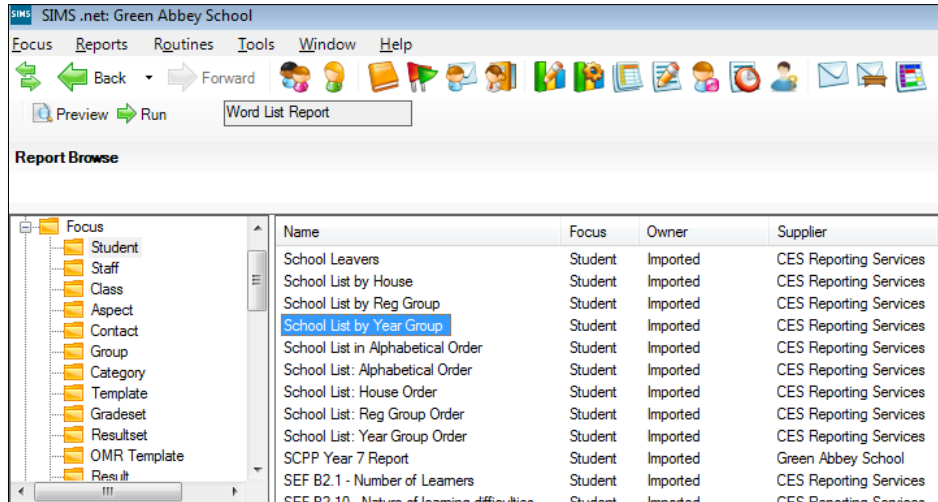
Surname	Forename	Year	Reg	note
Aaron	Chrs	Year 9	9A	To be obtained from previous school
Aaron	Liz	Year 9	9C	To be obtained from previous school
Ackton	Stanley	Year 13	G	To be obtained from previous school
				Stan suffered from bad attack of asthma on Tuesday afternoon. Used inhaler and contacted Mrs Ackton who took him straight to the doctor's surgery. It wasn't as bad as first thought and he was fit to return to school the following day.
				Came to medical on Friday afternoon. Needed inhaler.
				Whilst in a PE lesson, Stan had an asthma attack. It came in 2 stages, mild at first, he took his inhaler, then carried on with the lesson before suffering further breathing issues. His Ventolin helped him, and he was able to resume lessons for the day, although he did sit out for the remainder of PE. Mrs Ackton was informed by telephone.
				Stan was very short of breath in PE, about 15 mins into the lesson. Used his puffer and sat out for the remainder of the session
Ackton	Stephen	Year 9	9E	To be obtained from previous school
Acton	Jordan	Year 11	11F	Accidentally kicked in the shin when playing football. Parents notified.
Adasheji	Mohammed	Year 9	9F	To be obtained from previous school
Adebayi	Emmanuel	Year 11	11F	To be obtained from previous school
Akeman	Rebecca	Year 7	7E	To be obtained from previous school
Amnar	Tarak	Year 8	8C	To be obtained from previous school
Andrews	Jasmine	Year 11	11F	To be obtained from previous school
Ansell	Alfie	Year 9	9C	To be obtained from previous school
Ariano	Pietro	Year 11	11E	To be obtained from previous school
Arkell	Irene	Year 7	7F	To be obtained from previous school
Armitage	Jasper	Year 9	9B	Eyes swollen and sore. Dad came up at lunchtime to administer eye drops. Sore, itchy eyes. Given leave to remain inside during break times for the rest of term.
Arthur	Steven	Year 12	M	Steven started to suffer today with really itchy eyes, to the point where they were swollen and he was unable to concentrate in class. His parents were telephoned, and Mum came down with some eye drops. Steven was able to resume classes.
Astwick	Gwenneth	Year 8	8F	To be obtained from previous school
Atkinson	Ben	Year 12	N	Wheezing in PE - given inhaler and rested. Ben had a moderate asthma attack after afternoon registration. His mum was called and came to take him home.

- Click **Close** to close Word.

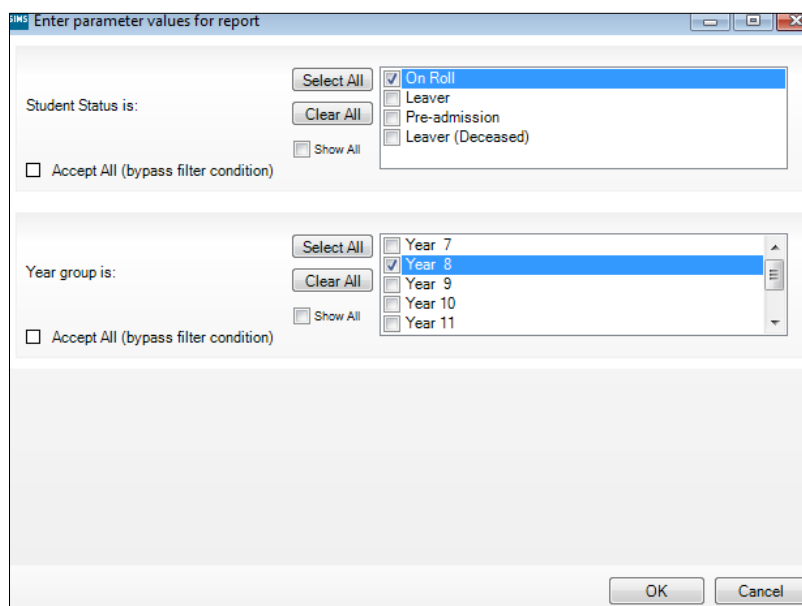
Step by Step – Running a Report with a Filter (Parameters)

This time a report will be run that requires some more information.

1. From the list of reports within the **Student Focus** folder, run the **School List by Year Group** report by either double clicking the report name, or clicking the report name and then **Run**.



2. The **Enter Parameter Values for Report** dialog is displayed.



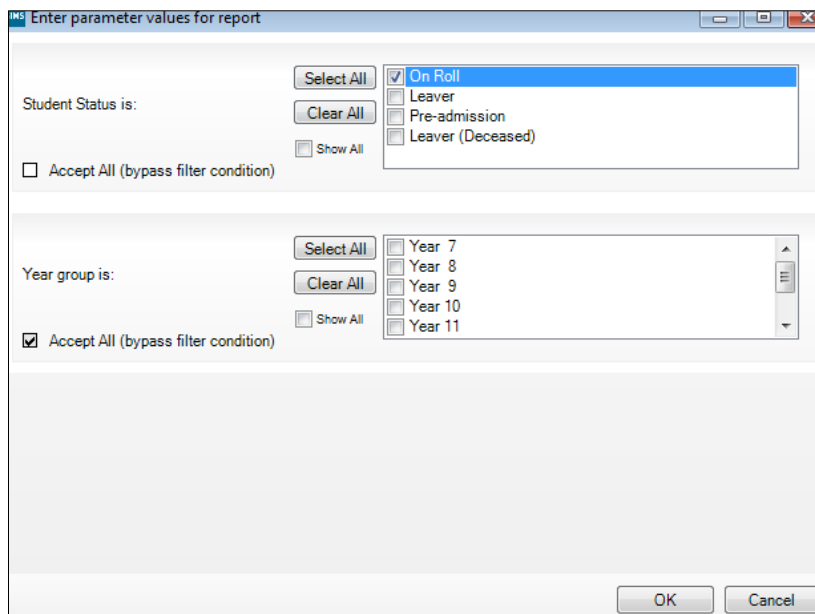
The dialog enables you to change the filters for the reports therefore achieving the exact report required. The top panel enables you to select the **Student Status**. As on roll pupils are required, select the **On Roll** check box.

3. The report needs to be for a specific year, so select the check box next to a year group, for example year 8 or year 3 and click **OK**.

This report will open in Word and it will show the details of the current pupils who are in the selected year.

Surname	Forename	Reg	DOB	Year
Alsop	Sabrina	8B	05 August 2007	Year 8
Amnar	Tarak	8C	05 February 2007	Year 8
Andrews	Maya	8D	23 July 2007	Year 8
Andrews	Wyatt	8E	28 December 2006	Year 8
Aston	Finlay	8F	12 January 2007	Year 8
Astwick	Gwenneth	8F	21 February 2007	Year 8
Avolon	Skyla	8E	02 January 2007	Year 8
Bond	Steve	8D	10 October 2006	Year 8
Broden	Ellis	8C	10 September 2006	Year 8
Brompton	Fletcher	8B	24 December 2006	Year 8
Cadilla	Samuel	8A	02 October 2006	Year 8
Carlsen	Zach	8B	25 April 2007	Year 8
Carter	Hannah	8C	28 April 2007	Year 8
Churchill	Martin	8D	14 September 2006	Year 8
Coldman	Emily	8E	25 March 2007	Year 8
Cooper	Edward	8F	14 July 2007	Year 8
Coppler	Robin	8E	02 February 2007	Year 8
Cosenza	Isabella	8D	30 June 2007	Year 8
Coulson	Caleb	8C	04 October 2006	Year 8
Dakota	Francesca	8B	15 December 2006	Year 8
Defeo	Lorenzo	8A	07 April 2007	Year 8

- Click **Close** to close Word.
- Run the **School List by Year Group** report again, this time **On Roll** and all **Year Groups** are required.



Rather than click all the different year groups, select the **Accept All (bypass filter condition)** check box, and click **OK**.

- The report will open in Word and will show the details of all pupils in the school. Notice that the pupils are in year group, and then surname order. Later we will investigate how to alter this to date of birth order or any other order required and also look at adding more fields, for example, address.
- Click **Close** to close the **Report Browse** screen.

Scenario – Request for Student Lists

One of the registration tutors has asked for a list of pupils in their class along with the date of births.

Step by Step – Producing Student Lists

1. Select **Reports | Run Report** or click **Run Report**.
2. Click the **Focus** folder, and then select the **Student** folder.
3. Run the **School List by Reg Group** report by double-clicking the report name or highlighting the report, and clicking **Run**.
4. Select the **On Roll** check box, and then select a year 8/year 3 registration group, for example, **8A/3TO**.
5. Click **OK**.
6. Click **Run** to run the **School List by Reg Group** report.
7. Click **Close** to close the **Report Browse** screen.

Scenario – Producing a Trip List

A few registration groups are going out of school to visit the local museum. The school needs one report which will include all the pupils attending.

Step by Step – Running a Pre-defined Report with Filters

This time, a report of all the children from a few registration groups is displayed.

1. Select the **School List by Reg Group** report and click **Run**.
2. Select the **On Roll** check box, a single year group and select a few year 9 registration groups, such as **9A, 9B** and **9C** or year 1 registration groups, such as, **ASH, ELM, OAK** and **PINE**. Click **OK**.
3. Notice this time that pupils from different registration groups are shown. Click **Close**.
4. Try running these reports and enter appropriate information:
 - a) **Address Labels – Parents**
 - b) **Birthday List**
 - c) **Meal List (Free Meals)** – you need to scroll down to see all the parameters.

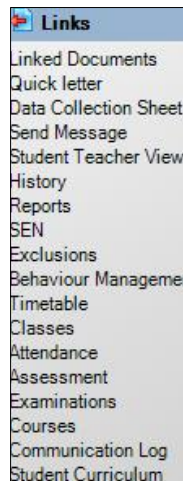
Scenario – Request for a Pupil's Contact Information

A teacher has requested contact information for a pupil.

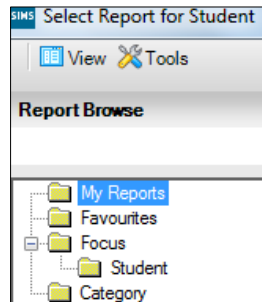
Step by Step – Producing a Report for a Pupil

1. Go into a pupil's record by selecting **Focus | Pupil | Pupil Details**, or click the **Student Details** icon.
2. Select any on roll pupil by clicking **Search**, therefore enabling all the pupils in the school to be displayed, and then double-click any pupil name.

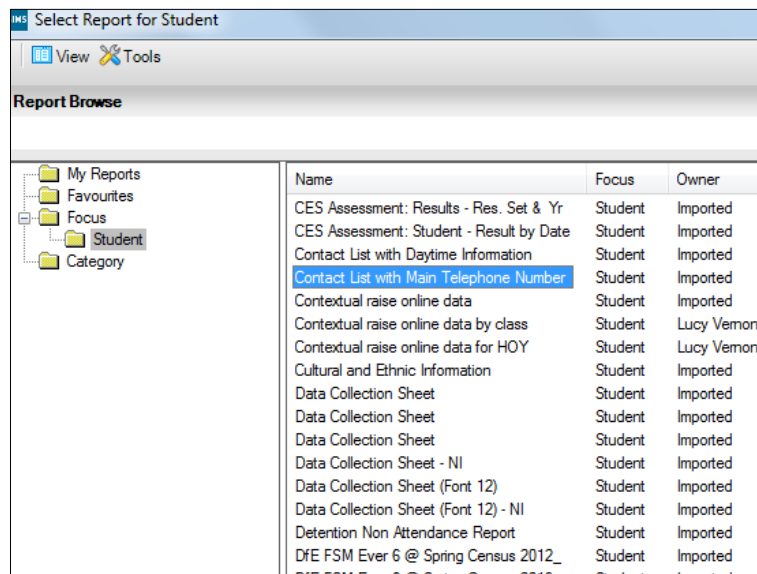
3. In the **Links** panel, click the link to **Reports**.



4. From the **Select Report for Student** screen, click the **+** next to the **Focus** folder and notice that the only folder under the **Focus** folder is the **Student** folder, therefore from a pupil record you can only run **Student Focused** reports.



5. Click the **Student** folder; all the **Student Focus** reports are now shown.
6. Find the **Contact List with Main Telephone Number** report and double-click it (therefore running it).



You are not offered any run time options, so a year group or registration group does not need to be selected.

Word will open with the pupil's contact information.

7. Click **Close**.

Dealing with a Request for a Person’s Data Output

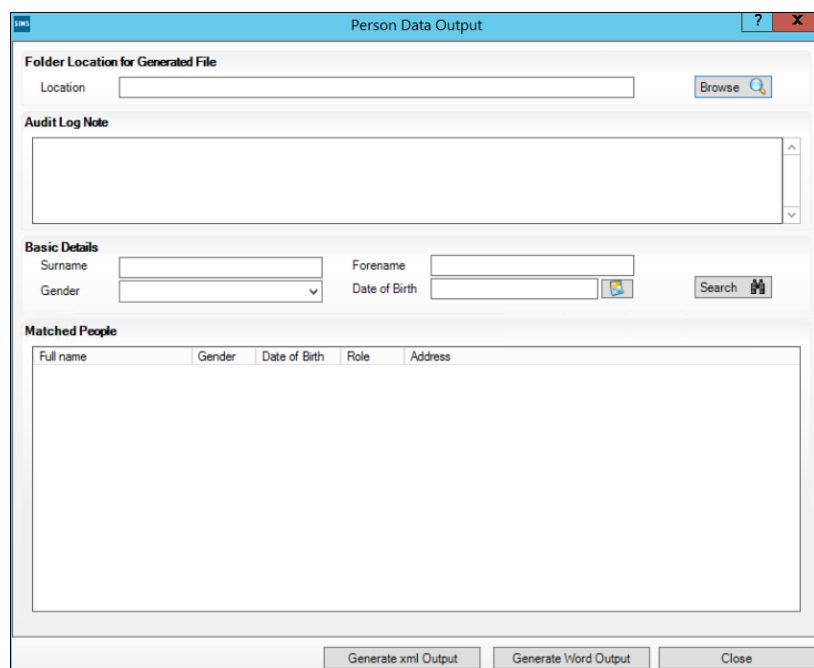
Users with the Data Protection permission are now able to generate a **Person Data Output**, which provides an output of specified data for a pupil/student, contact or member of staff held within SIMS 7. This can be used in conjunction with other reports and outputs to assist the user with completing any SARs (Subject Access Requests).

The report contains a large amount of sensitive information held on the subject. As the Data Controller, it is the responsibility of the school’s Data Protection Officer to thoroughly review the report output for accuracy and to redact any information they feel could cause data protection issues. Information on redaction can be found in the Ineffective redaction section in the following document: <https://ico.org.uk/media/for-organisations/documents/how-to-disclose-information-safely-removing-personal-data-from-information-requests-and-datasets/2013958/how-to-disclose-information-safely.pdf>.

If requested as part of the Subject Access Request, additional information, for example on attendance, dinner money, etc. can be obtained by running pre-defined if required.

Step by Step – Producing a Person Data Output

1. Select **Routines | Data Out | Person Data Output** to display the **Person Data Output Log**.
2. Click **New** to display the **Person Data Output** dialog.

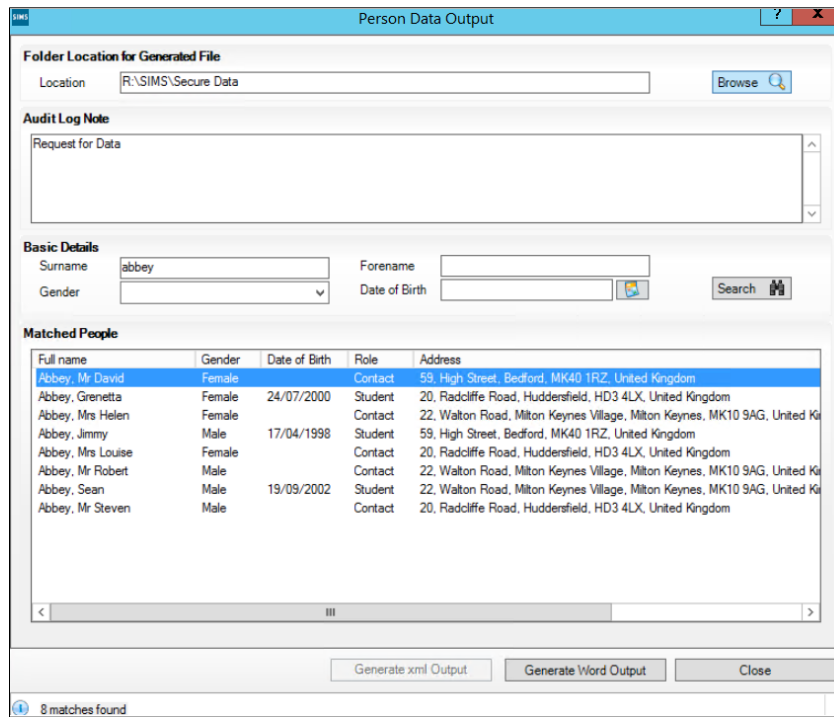


3. The **Location** field may be pre-populated with the previous save location of the generated file. If the field is blank or you want to change the save location, click **Browse** adjacent to the **Location** field to display the **Browse For Folder** dialog. Select the location on your PC at which you want to store the output and click **OK**.

NOTE: The contents of the output will contain sensitive information which will no longer be protected by SIMS permissions. It is the school's responsibility to ensure its security.

4. Enter any notes in the **Audit Log Note** field. These will not be displayed in the output.

5. Search for the relevant person by entering any **Surname, Forename, Gender or Date of Birth** information to narrow the results, then clicking **Search**. The results are displayed in the **Matched People** panel. Users with multiple roles are displayed as multiple rows in the **Matched People** panel with one row per role.



6. Select the relevant Student and then click **Generate Word Output** (**Generate xml Output** is used for Staff only). The **Person Data Output Agreement** is displayed.

NOTE: Ensure that you read carefully, understand and accept the statement.

7. Select the check box then click **Continue**. The output is then generated in Microsoft Word format (or XML if for Staff) and stored in the specified location and an entry is displayed in the **Person Data Output Log**.

Created On	Person	Role	Created By	Output File	Note
24 Jul 2019 11:16	Sean Abbey	Student	Adrian Blacker	R:\Secure Data\PDO_Sean_Abbey_Student_2019-07-24_11-16.docx	

02 List Reports – An Introduction

This chapter contains:

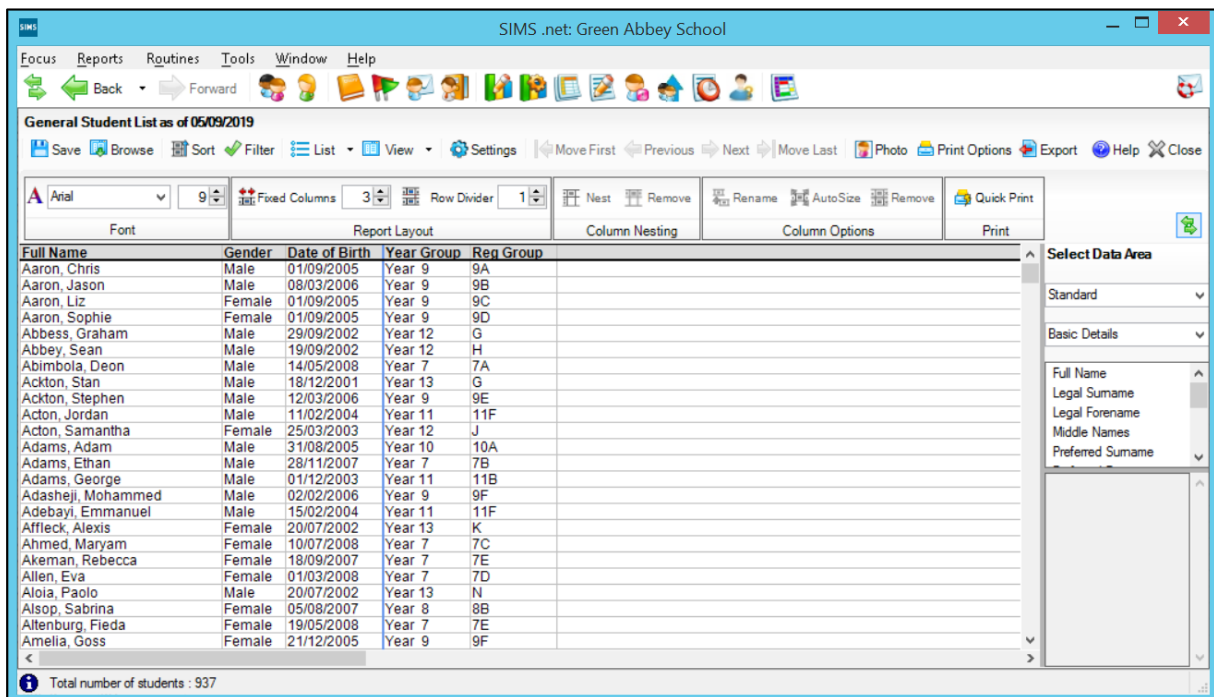
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Chapter Introduction

This chapter explores the Student List area.

Step by Step – General Student List – Overview

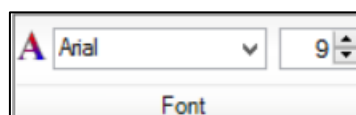
1. Select Reports | Student List | General Student List.



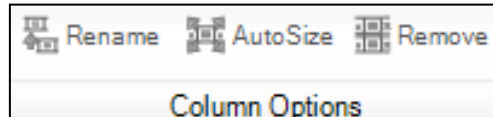
The graphic above displays the **Total number of students** at the bottom left. Your own data may differ. The pupils included in the list are those **On-roll** and those with a Pre-Admission Status of **Accepted**.

The default columns applied to all lists are **Full Name, Gender, Date of Birth, Year Group and Reg Group**.

- The font defaults to Arial 9 pt and may be changed using the tools in the **Font** toolbar. This will probably be preferable if the list is to be printed.



3. If a larger font is used then the data may not fit into the original column width and you will need to re-size each column. Click on the column header of the column to be re-sized. The selected column is displayed in red. Only one column can be selected at a time. Either click **AutoSize** on the **Column Options** toolbar or right-click the header and select **AutoSize Column** from the drop-down menu. Repeat for each column as required.



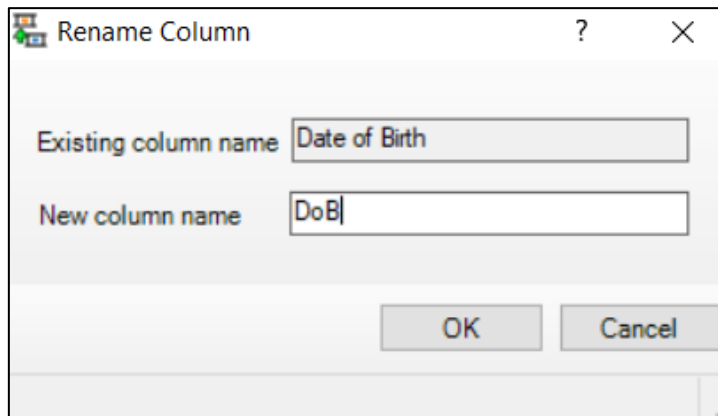
General Student List as of 05/09/2019

Save Browse Sort Filter List View Settings Move First Pre

Font: Arial | 12 | Report Layout: Fixed Columns: 3 | Row Divider: 1 | Column Nesting: Nest, Re

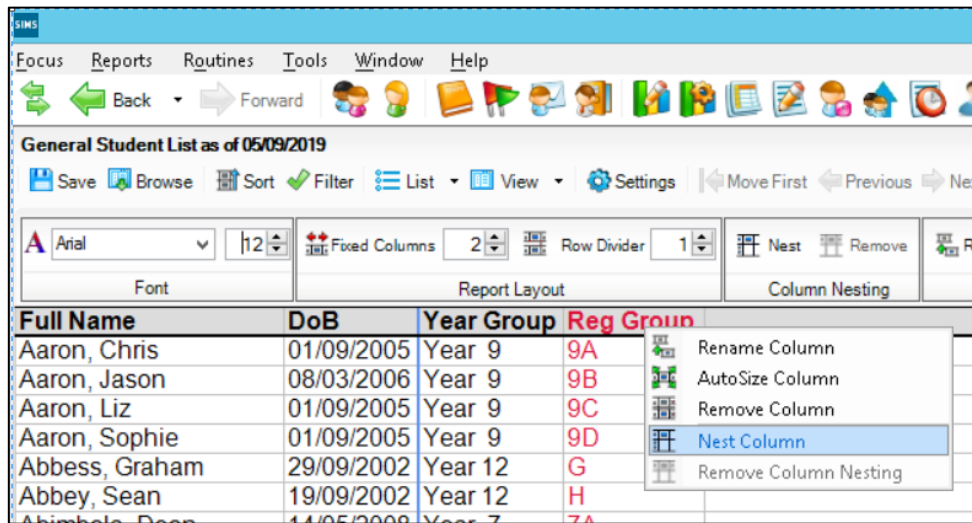
Full Name	Gender	Date of Birth	Year	Class	Room
Aaron, Chris	Male	01/09/20			
Aaron, Jason	Male	08/03/20			
Aaron, Liz	Female	01/09/20			
Aaron, Sophie	Female	01/09/20			
Abbess, Graham	Male	29/09/20			
Abbey, Sean	Male	19/09/2002	Year 12	H	
Abimbola, Deon	Male	14/05/2008	Year 7	7A	
Ackton, Stan	Male	18/12/2001	Year 13	G	
Ackton, Stephen	Male	12/03/2006	Year 9	9E	
Acton, Jordan	Male	11/02/2004	Year 11	11F	
Acton, Samantha	Female	25/03/2003	Year 12	J	

4. It is possible to rename a column heading so that, for example, **Date of Birth** could become **DOB**. Use **Rename** on the toolbar or **Rename Column** from the right-click menu to do so.

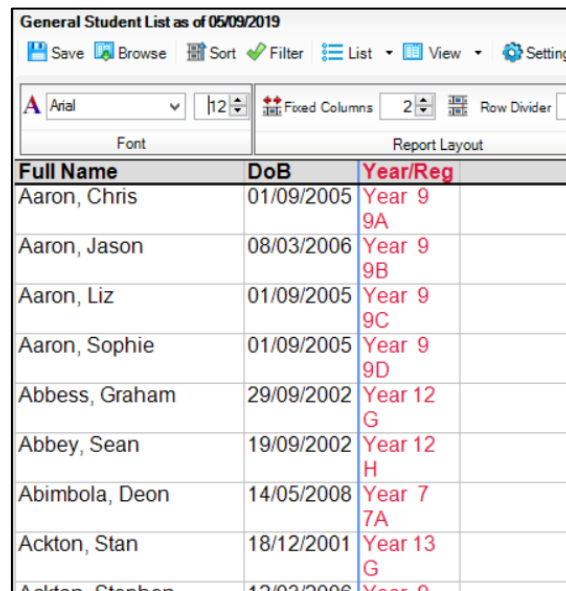


5. **Remove** the **Gender** column using the tool or right-click menu.
6. Nesting a selected column causes it to be merged with the previous column on its left, with the data displayed on the row below, as illustrated in the following pair of graphics. Only the first column heading is displayed and would probably need to be renamed.

Right-click on the **Reg Group** column header and select **Nest Column** from the menu or use the appropriate **Column Nesting** toolbar tool.

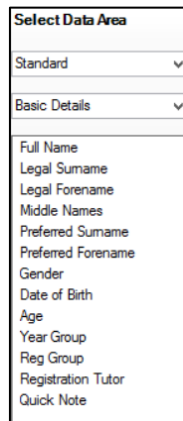


7. Rename the column to **Year/Reg** and **AutoSize**.



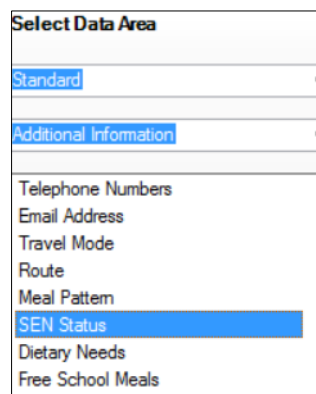
8. Column nesting can be removed by using the right-click menu or **Remove** tool on the **Column Nesting** toolbar as seen in the earlier graphic. The column header may need renaming again.

9. Additional columns of data can be added to the student list from the **Select Data Area** panel on the right of the window.



The view defaults to the **Standard** set of data fields. The view can be changed to view **Academic** data fields, if required, by changing the first drop-down list.

The second drop-down list enables you to select a category. This defaults to **Basic Details** and can also be changed if required. Each category contains a range of fields that you may wish to include on a Student List report, including blank columns of various widths.



Select the **Additional Information** category from the second drop-down list, to display its associated fields in the panel below.

Click and drag the **SEN Status** field from the field selection list to the required location on the report then release the mouse button.

General Student List as of 05/09/2019

Save Browse Sort Filter List View Settings Move First Previous Next Move Last Photo

Font: Arial 12 Fixed Columns: 2 Row Divider: 1

Full Name	DoB	Year	Reg Group	SEN Status
Aaron, Chris	01/09/2005	Year 9	9A	
Aaron, Jason	08/03/2006	Year 9	9B	
Aaron, Liz	01/09/2005	Year 9	9C	
Aaron, Sophie	01/09/2005	Year 9	9D	
Abdess, Graham	29/09/2002	Year 12	G	Education, Health and Care Plan
Abbey, Sean	19/09/2002	Year 12	H	
Abimbola, Deon	14/05/2008	Year 7	7A	
Ackton, Stan	18/12/2001	Year 13	G	SEN Support
Ackton, Stephen	12/03/2006	Year 9	9E	Education, Health and Care Plan
Acton, Jordan	11/02/2004	Year 11	11F	
Acton, Samantha	25/03/2003	Year 12	J	
Adams, Adam	31/08/2005	Year 10	10A	
Adams, Ethan	28/11/2007	Year 7	7B	
Adams, George	01/12/2003	Year 11	11B	
Adasheji, Mohammed	02/02/2006	Year 9	9F	
Adebayi, Emmanuel	15/02/2004	Year 11	11F	
Affleck, Alexis	20/07/2002	Year 13	K	
Ahmed, Maryam	10/07/2008	Year 7	7C	
Akeman, Rebecca	18/09/2007	Year 7	7E	

10. From the same category drag and drop the following fields: **% Attendance, Free School Meals, Pupil Premium Indicator, In Care, English as Additional Language** and **Dietary Needs**.

General Student List as of 05/09/2019

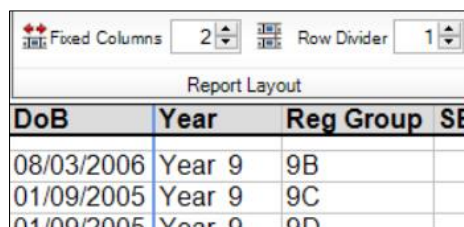
Save Browse Sort Filter List View Settings Move First Previous Next Move Last Photo Print Options Export

Font: Arial 12 Fixed Columns: 2 Row Divider: 1

Full Name	DoB	Year	Reg Group	SEN Status	% Attendance	Free School Meals	Pupil Premium Indicator	In Care	English as Ad
Aaron, Jason	08/03/2006	Year 9	9B		100.00	No	No	No	No
Aaron, Liz	01/09/2005	Year 9	9C		75.00	Yes	Yes	No	No
Aaron, Sophie	01/09/2005	Year 9	9D		100.00	Yes	Yes	No	No
Abdess, Graham	29/09/2002	Year 12	G	Education, Health and Care Plan	100.00	No	No	No	No
Abbey, Sean	19/09/2002	Year 12	H		50.00	Yes	Yes	No	No
Abimbola, Deon	14/05/2008	Year 7	7A		100.00	No	No	No	No
Ackton, Stan	18/12/2001	Year 13	G	SEN Support	100.00	No	No	No	No
Ackton, Stephen	12/03/2006	Year 9	9E	Education, Health and Care Plan	100.00	Yes	Yes	No	No
Acton, Jordan	11/02/2004	Year 11	11F		100.00	No	No	No	No
Acton, Samantha	25/03/2003	Year 12	J		100.00	No	No	No	No
Adams, Adam	31/08/2005	Year 10	10A		100.00	Yes	Yes	No	No
Adams, Ethan	28/11/2007	Year 7	7B		100.00	No	No	No	No
Adams, George	01/12/2003	Year 11	11B		50.00	No	No	No	No

11. By now the list has become very wide and no doubt cannot fit in the window. The horizontal scroll bar at the bottom of the window can be used to view the columns on the right. Notice as you scroll to the right the columns to the left of the blue line, the **Fixed Columns**, remain visible so you can always see the students' names.

The number of columns that remain fixed can be controlled using **Fixed Columns** in the **Report Layout** toolbar.



Set the **Fixed Columns** to 1.

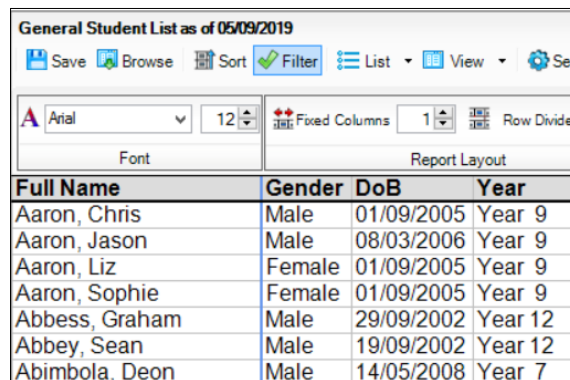
The concept of **Fixed Columns** is also useful if the number of additional columns eventually placed on the list is greater than those that will fit onto a printed page. In this case, the continuation sheets will also contain the fixed columns..

The **Row Divider** setting on the same toolbar determines how often the horizontal lines should be displayed and printed. For some purposes a line between each row looks cluttered and a setting of five is more convenient.

12. **Rename** and **AutoSize** columns with long column header labels but short contents such as **English as Additional Language**, which contains either **Yes** or **No**, rename it to **EAL** and then **AutoSize** the column. Use the following graphic as a guide.

% Attend	FSM	PP	LAC	EAL
100.00	Yes	Yes	No	No
100.00	No	No	No	No
75.00	Yes	Yes	No	No
100.00	Yes	Yes	No	No
100.00	No	No	No	No
50.00	Yes	Yes	No	No
100.00	No	No	No	
100.00	No	No	No	No
100.00	Yes	Yes	No	No
100.00	No	No	No	No
100.00	No	No	No	No
100.00	Yes	Yes	No	No
100.00	No	No	No	No
50.00	No	No	No	No
100.00	No	No	No	Yes

13. Add **Gender**, removed earlier, back to the list between the **Full Name** and **DoB** columns. To do so change the **Category** drop-down back to **Basic Details**. Drag **Gender** and drop it on top of the **DoB** column. It will be inserted to the left of the column dropped on.



Full Name	Gender	DoB	Year
Aaron, Chris	Male	01/09/2005	Year 9
Aaron, Jason	Male	08/03/2006	Year 9
Aaron, Liz	Female	01/09/2005	Year 9
Aaron, Sophie	Female	01/09/2005	Year 9
Abbess, Graham	Male	29/09/2002	Year 12
Abbey, Sean	Male	19/09/2002	Year 12
Abimbola, Deon	Male	14/05/2008	Year 7

14. Now nest all the columns **Gender**, **DoB**, **Year**, **Reg** and **SEN** with the **Full Name** column. Each column must be nested individually. Rename the first column to **Student**.

General Student List as of 05/09/2019

Save Browse Sort Filter List View Settings Move First Previous Next

Font: Arial 12 Fixed Columns: 1 Row Divider: 1

Student	% Attend	FSM	PP	LAC	EAL	Dietary Needs
Aaron, Chris Male 01/09/2005 Year 9 9A	100.00	Yes	Yes	No	No	
Aaron, Jason Male 08/03/2006 Year 9 9B	100.00	No	No	No	No	
Aaron, Liz Female 01/09/2005 Year 9 9C	75.00	Yes	Yes	No	No	
Aaron, Sophie Female 01/09/2005 Year 9 9D	100.00	Yes	Yes	No	No	

15. From the **Medical** category drag **Medical Conditions (all)** and drop it on top of the **Dietary Needs** column to insert it before Dietary Needs.

Select Data Area

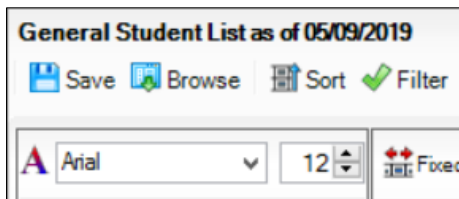
Standard

Medical

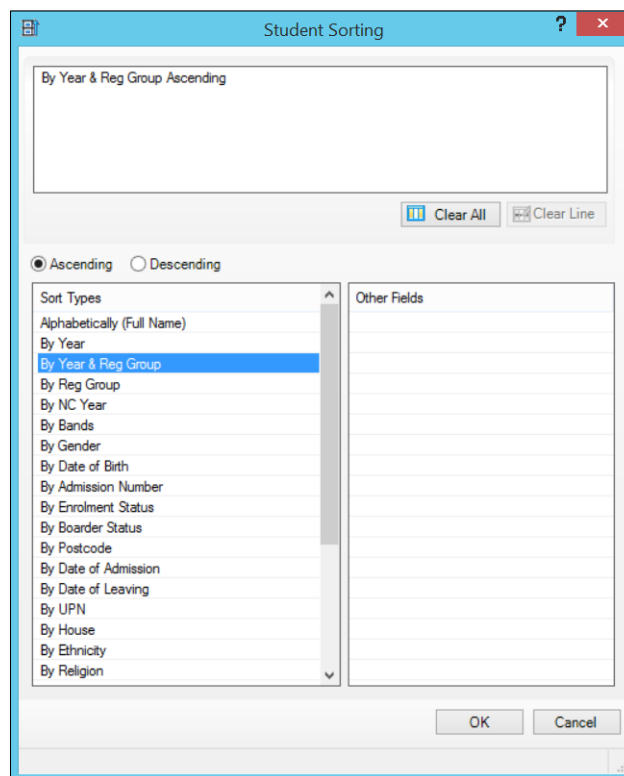
- Medical Conditions (all)
- Medical Notes Summary
- A.D.H.D.
- Anaphylaxis
- Arthritis
- Asthma
- Chronic Fatigue Syndrome
- Diabetes
- Eczema
- Epilepsy
- Hayfever
- Multiple Sclerosis
- Myalgic Encephalopathy
- None
- Osteoporosis
- Post Viral Fatigue Syndrome
- Tuberculosis

Student	% Attend	FSM	PP	LAC	EAL	Medical Conditions (all)	Dietary Needs
Ashdown, Rae Male 18/09/2004 Year 10 10B	100.00	No	No	No	No		
Aston, Finlay Male 12/01/2007 Year 8 8F	100.00	Yes	Yes	No	No	Anaphylaxis	Seafood allergy
Astoni, Sonya Female 22/11/2007 Year 7 7F	100.00	Yes	No	No	No		

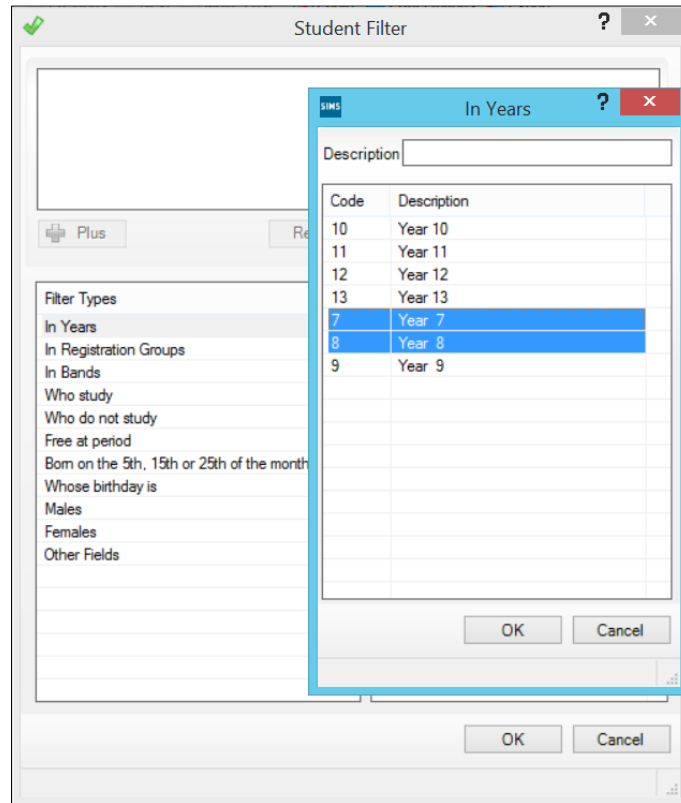
16. Lists can be sorted into a different order if required. Click on **Sort**.



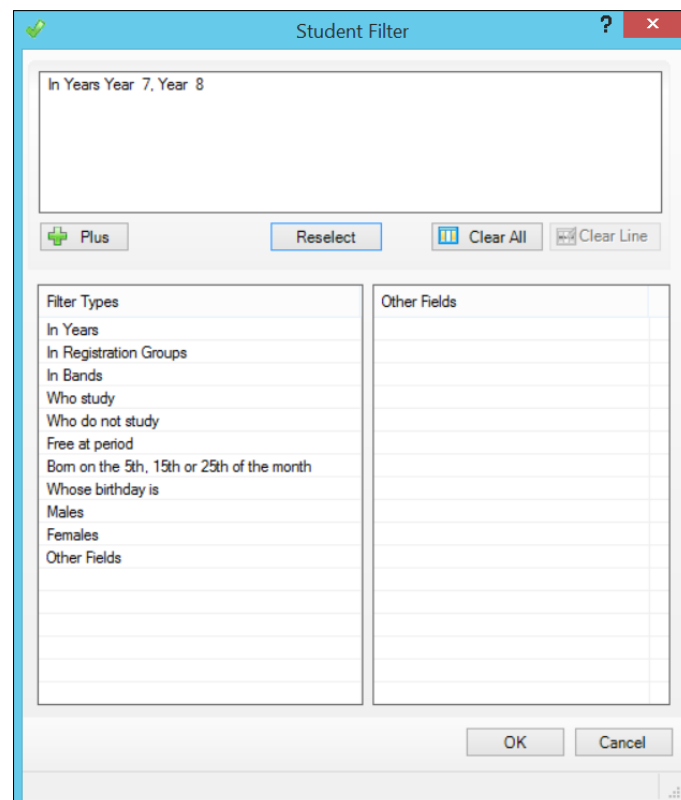
17. The **Ascending** option is pre-selected. If reverse order is required, change the radio button to **Descending**. Double-click on the item to be sorted or grouped by in the **Sort Types** list on the left of the dialog box so that it appears in the field at the top. Additional sort items can be selected if required. Select **By Year & Reg Group**. Click **OK**.



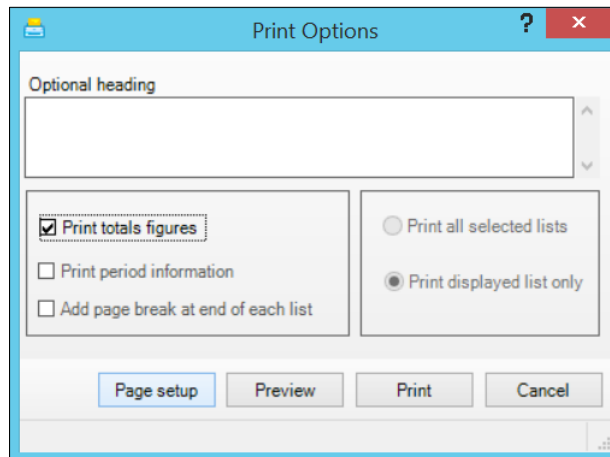
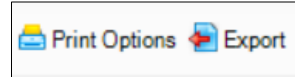
18. The list of students, still in alphabetical order of name, should now be grouped into their registration group within each year group.
19. Lists can be filtered to include only a particular selection of students. Click on **Filter**.



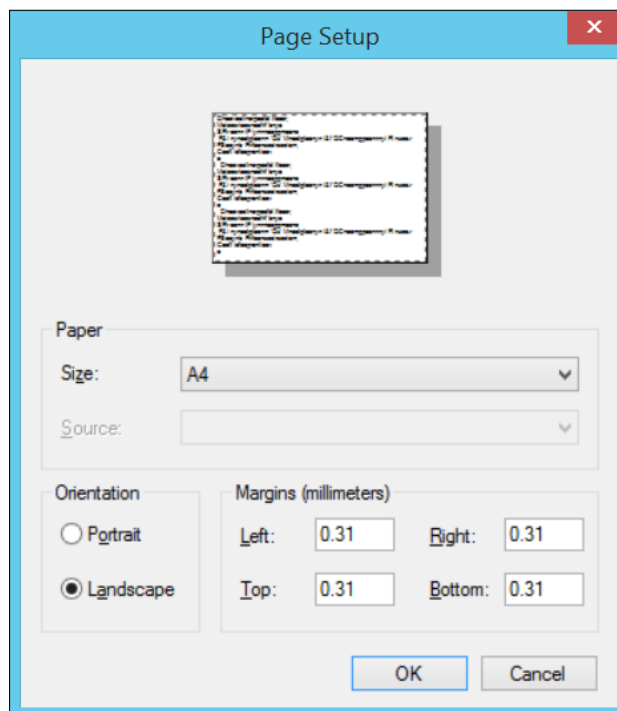
20. Double click on the **In Years** item from the **Filter Types** list on the left of the dialog box. Select the years required in the list – **Year 7 and 8**. You can use the Shift or Control key on your keyboard to select more than one. Click **OK**.



- 21. Further filters can be added in the same way. Click on **OK**.
- 22. The count at the bottom left of the window will show you how many students meet the criteria. Student in years 9-13 should not be visible.
- 23. **AutoSize** the **Dietary Needs** column.
- 24. The list can be printed. Click **Print Options**.

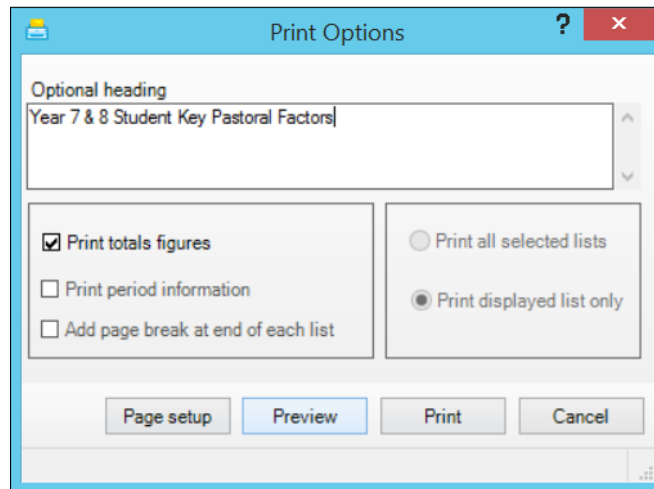


- 25. Click **Page Setup** to set the orientation of the printout to **Landscape**.



- 26. Check the **Paper Size** is set to **A4**. Notice margins can be adjusted in here too. Click **OK**.

27. Enter a heading in the **Optional** heading field: **Year 7 & 8 Student Key Pastoral Factors**.



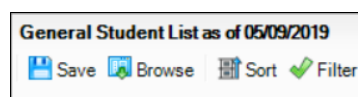
28. Click **Preview**.

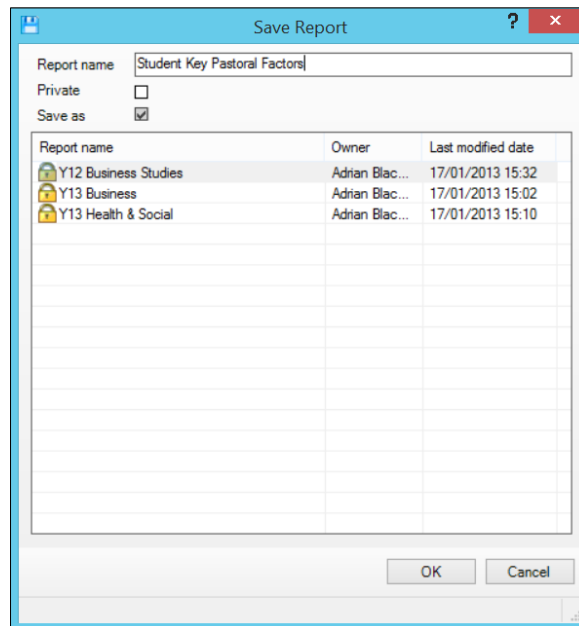
Student	% Attend	FSM	PP	LAC	EAL	Medical Conditions (all)	Dietary Needs
Abimbola, Deon Male 14/05/2008 Year 7 7A	100.00	No	No	No			
Benson, Zachary Male 22/12/2007 Year 7 7A	75.00	No	No	No	No		
Bernhagen, Claus Male 09/05/2008 Year 7 7A	100.00	No	No	No	Yes		
Berry, Claire Female 30/04/2008 Year 7 7A	50.00	No	No	No			

29. Increase the page number in the top right of the window to scroll through the pages. There is a print button at the top left.

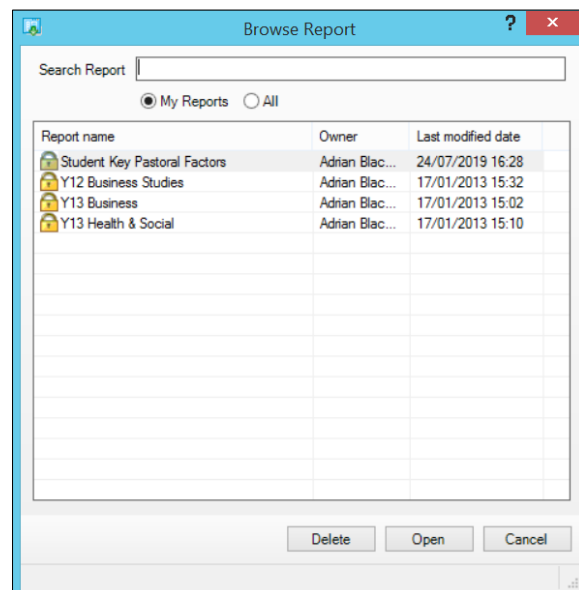
30. Use **Close** on the top left to return to the list in SIMS.

31. The list can be saved. Click on **Save** at the top left of the list window.

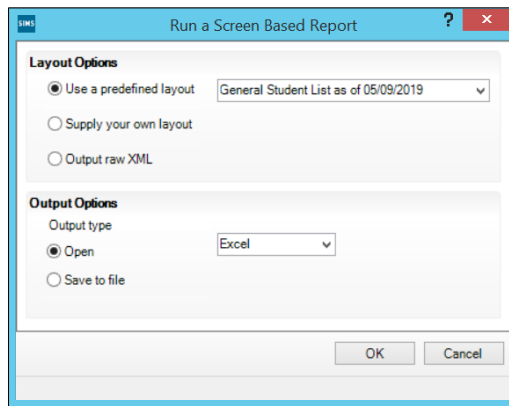




32. Enter a descriptive name and click **Save**. The list structure is saved, not the pupil data content. Next time the list is required, click on **Browse** from within the Student List window, select the list name and click **Open**. The latest data will be drawn from SIMS based on the saved list specification.



33. The list can be exported, to MS Excel for example. Click on **Export**, next to **Print Options**.



34. Select **Excel** as the **Output type** and click **OK**.

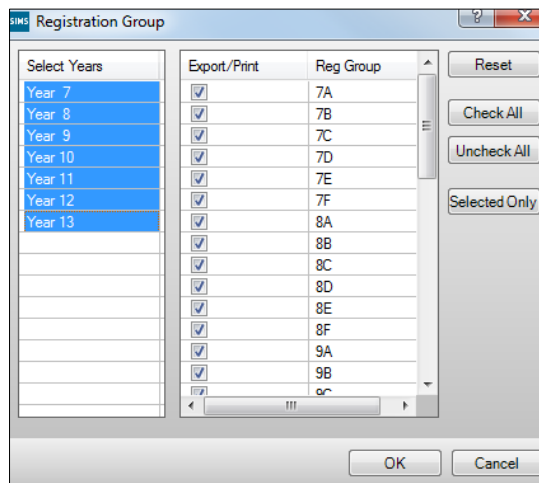
35. Close Excel and the list in SIMS.

Scenario – Request for Registration Group Lists for Consultation Evening

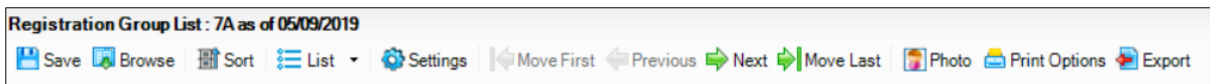
A signing-in sheet for the parents’ consultation evening has been requested for all registration groups.

Step by Step – Registration Group Lists for Consultation Evening

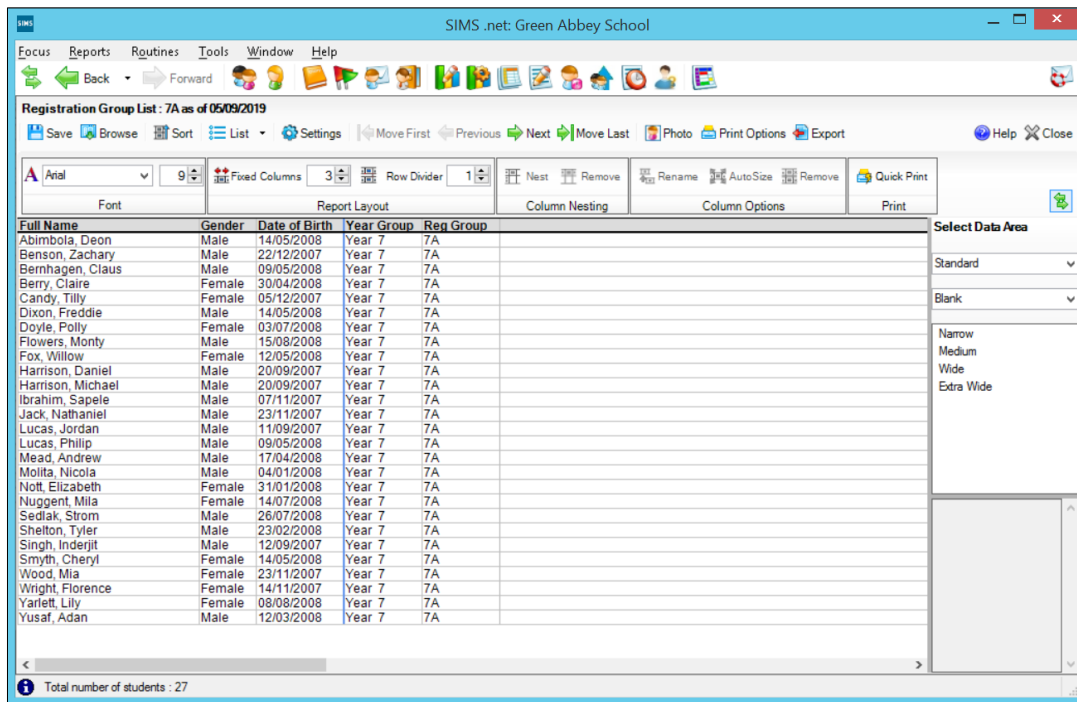
1. Select **Reports | Student List | Registration Group Lists**. The first year group displayed is selected by default.



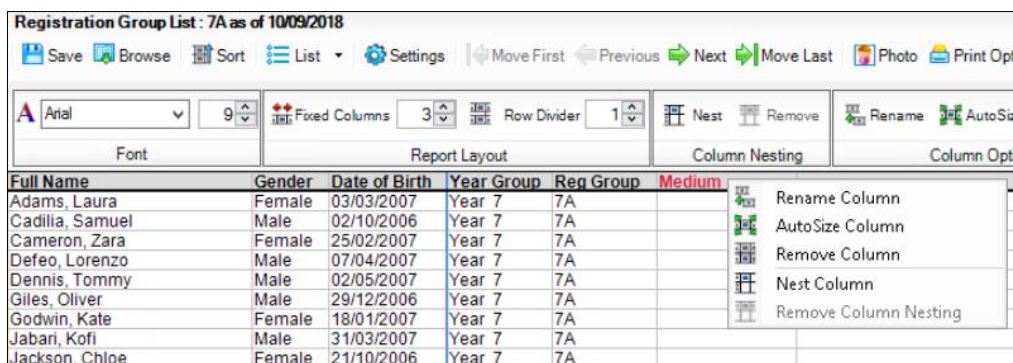
2. Select all years in the **Select Years** panel by pressing the **Shift** key and left-click the last year group. All registration groups are displayed as selected. Click **OK**.



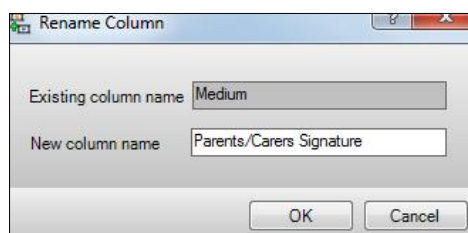
3. The first Reg Group list is displayed. The others can be seen by clicking on **Next**.
4. In the **Select Data Area** panel, select **Blank** in the category drop down list.



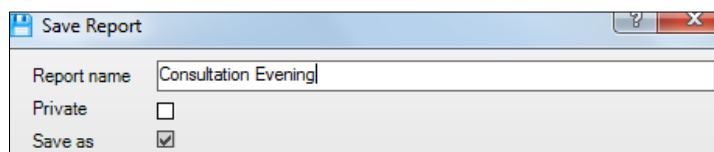
5. Drag and drop the **Medium** column onto the **Registration Group List** screen. The new column will be displayed with a heading of **Medium**.



6. Rename the column **Parents/Carers Signature**.



7. Re-size the column to fit the heading.
8. Click **Save** and name as **Consultation Evening**.



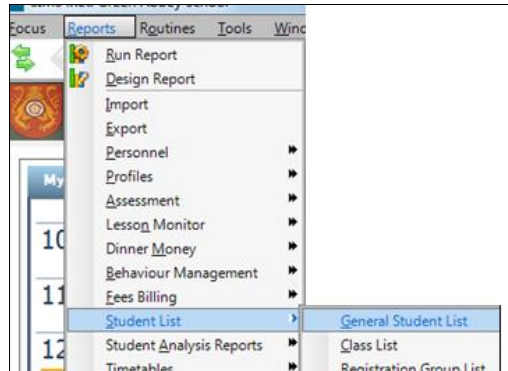
9. Click **OK** and click **Close**.

Scenario – Request for Consultation Evening Registration Group Lists for a Year Group

The head teacher has requested a print out of the consultation evening report for a year group.

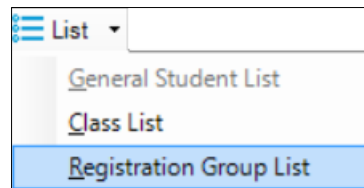
Step by Step – Consultation Evening Registration Group Lists for a Year Group

1. Select **Reports | Student List | General Student List**.

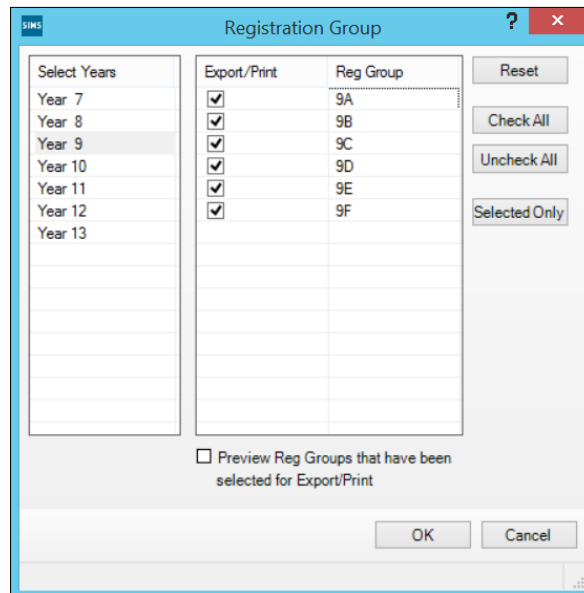


2. Click on **Browse** and select the list just created called **Consultation Evening**. Click on **Open**.

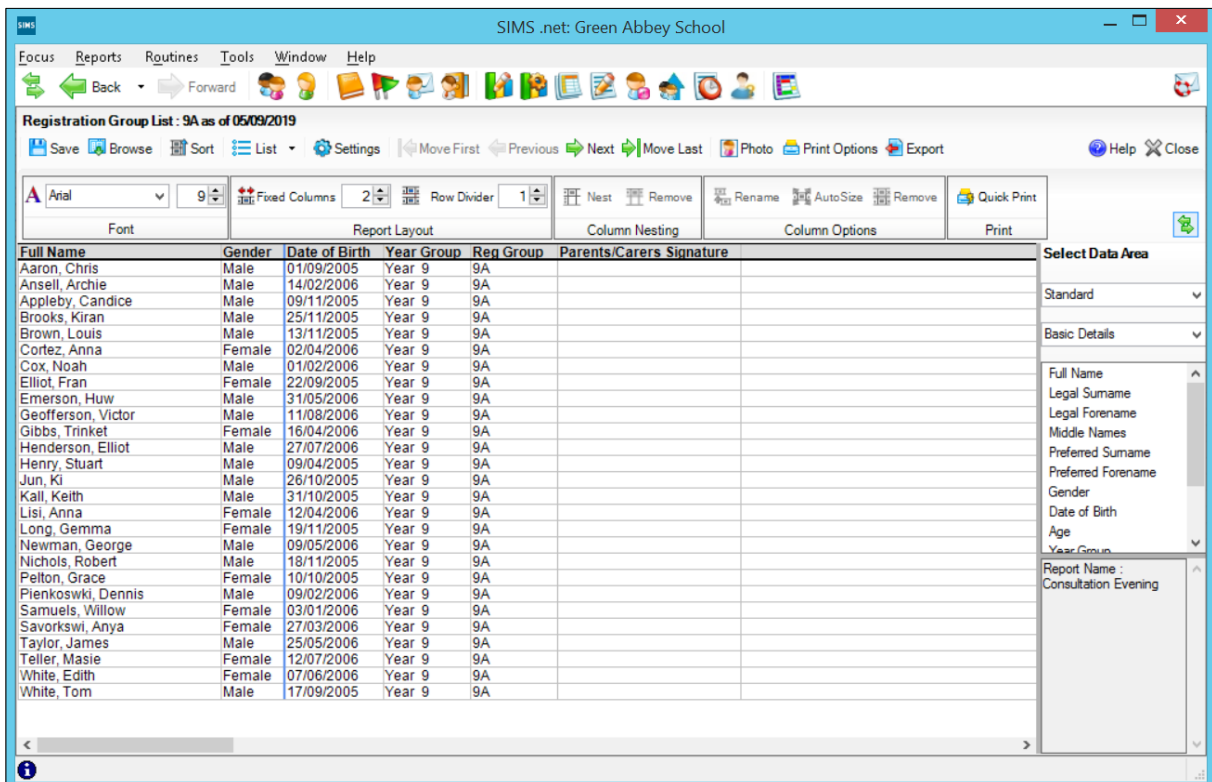
- Click on the drop-down arrow next to **List**, and then select **Registration Group List**.



- Select **Year 9** (or **Year 3**). All year 9 registration groups are listed.

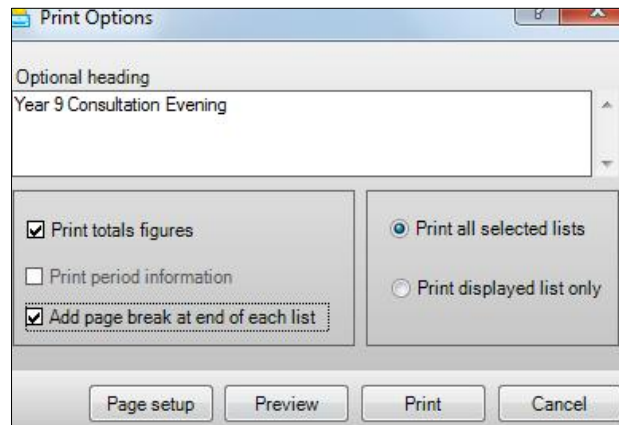


- Click **OK**.

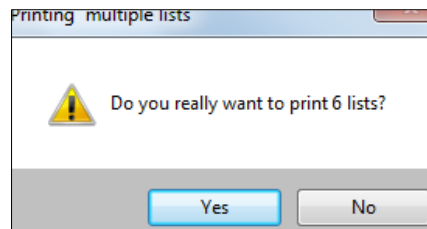


Each year 9 registration group has its own list with the additional column entitled **Parents/Carers Signature**. Use **Next** and **Forward** to view.

- Adjust the font size and column widths as required.
- Click **Print Options** to print the lists.



- Enter an appropriate **Optional heading**. Select the required print options, such as **Add page break at end of each list** to ensure each one is printed on a separate sheet. Click **Preview** to view your lists before clicking on **Print**.



- Confirm the print by clicking **Yes**, although in the training room select **No**.
- Click **Close** to close the **Registration Group Lists** screen.

03

Modifying Existing SIMS Reports


This chapter contains:

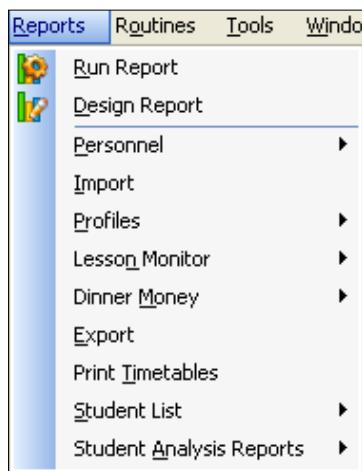
Chapter Introduction	31
Step by Step – Running Reports Using Design Report	31
Scenario – Modifying a Pre-Defined Report	31
Step by Step – Adding Extra Fields to a Pre-Defined Report	32
Activity – Adding Additional Fields to a Staff Report.....	42

Chapter Introduction

So far, **Run Report** has been used to run pre-existing reports. In **Design Report** you can edit existing reports as well as designing reports from scratch. This chapter will investigate report design process.

Step by Step – Running Reports Using Design Report

1. Use the **Window** menu and select **Close All** to close any open SIMS windows.
2. Select **Reports | Run Report** or click **Run Report**. 




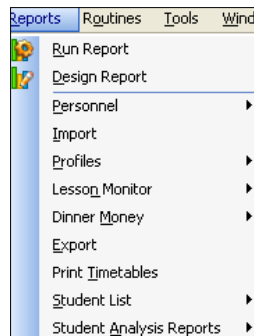
3. From the list of reports within the **Student Focus** folder, run the **School List by Reg Group** report by either double clicking the report name, or clicking the report name and then **Run**.
4. From the **Enter parameter values for the report** dialog box, select **On Roll** for **Student Status**, **Year 7** (or **Year 2**) for **Year Group** field, and then the **Accept All (bypass filter condition)** check box for the **Reg Groups** field. Click **OK**.
5. The report runs in Word. Notice it is a continuous list, grouped by registration group, of student names and date of birth. Having observed the report, **close** the **Word** document and the **Report Browse** window in SIMS.

Scenario – Modifying a Pre-Defined Report

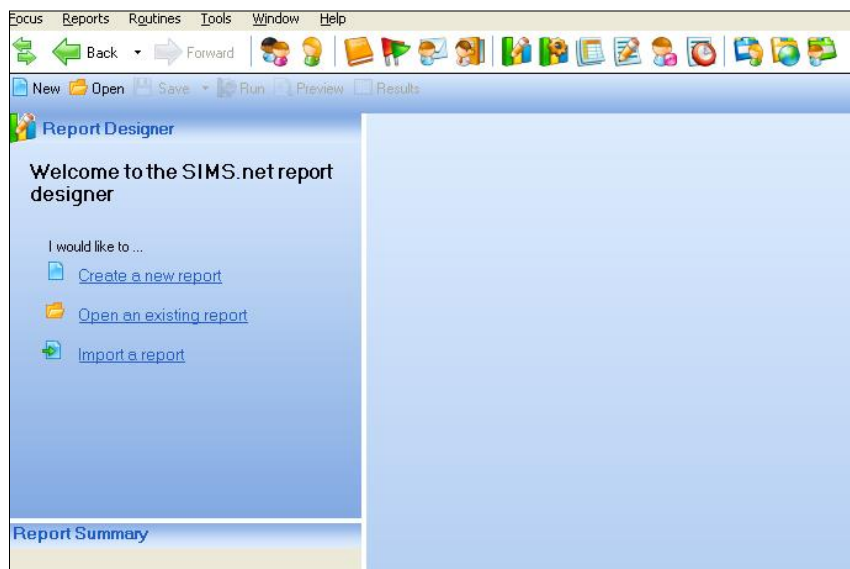
The SEN co-ordinator has asked that the **SEN Status Code** be shown on the **School List by Reg Group** report as well as a blank column to add notes if required.

Step by Step – Adding Extra Fields to a Pre-Defined Report

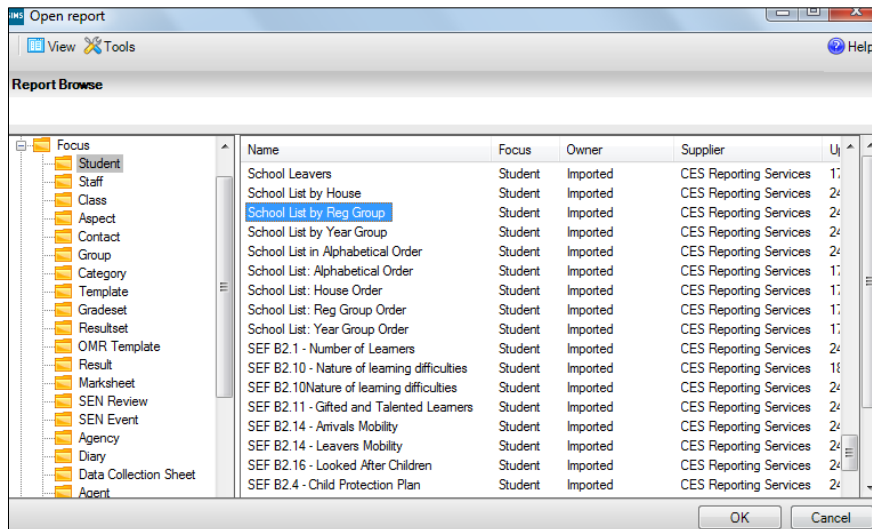
1. **Close** any open SIMS windows except for the SIMS Home Page.
2. Select **Reports | Design Report** or click **Design Report** on the toolbar. 



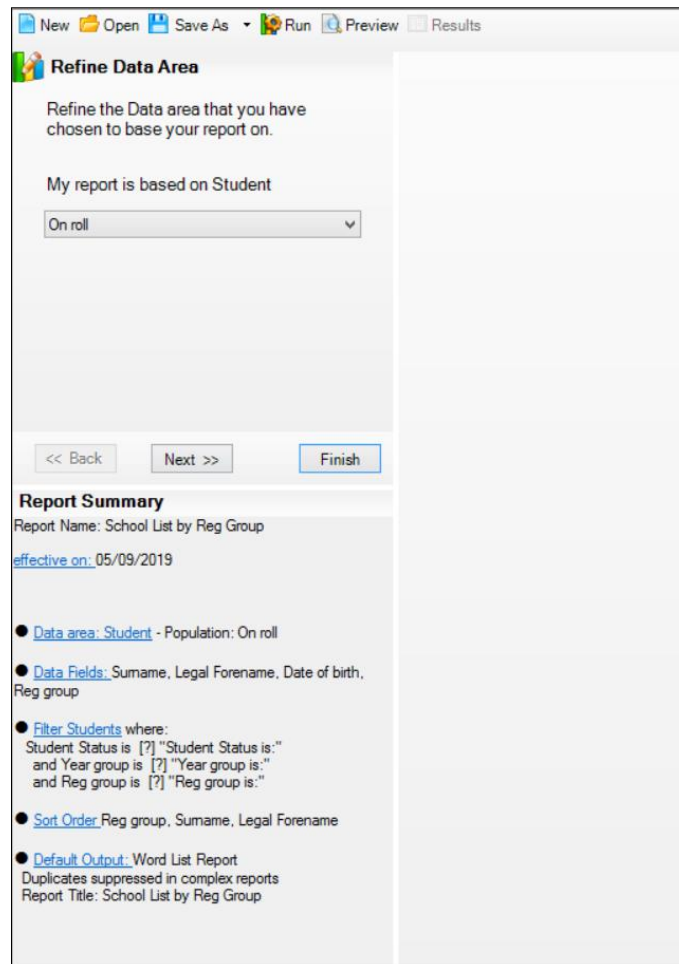
3. The **Report Designer** wizard is displayed and you can select from three options; **Create a new report**, **Open an existing report** or **Import a report** from another school or from a report created by Capita or anywhere else.



4. Click the **Open an existing report** hyperlink.
5. Expand **Focus**, select the **Student** folder and then the **School List by Reg Group** report.

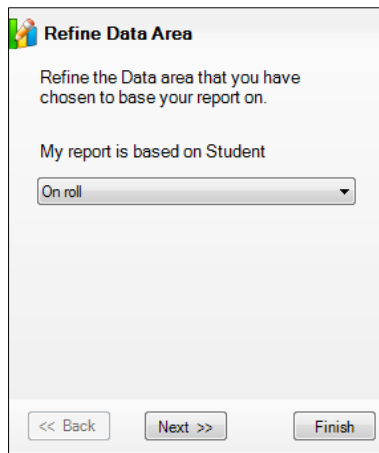


6. Click **OK** to display the report design in the wizard.

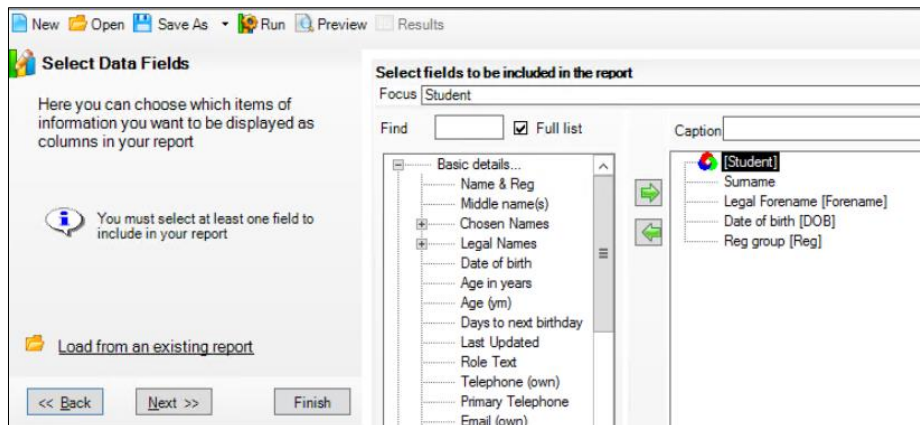


7. Notice that the screen is now split into sections. The top left area is the navigation area of the wizard, with **Back**, **Next** and **Finish**. The bottom left shows a summary of the areas of the report and the large area on the right shows anything that has been selected. This area will be blank at this stage if you are creating a new report but populated if you have opened an existing report.

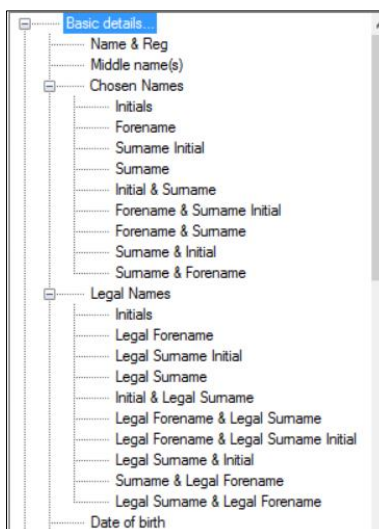
8. The first step of the wizard enables you to refine the data area to be reported on. Currently, the report will be based on pupils who are on roll. For this report that is the requirement, so click **Next** to move to the next step of the wizard.





9. The **Select Data Fields** step gives a long list of all possible fields in SIMS that could be included in the report and in the main area are the fields that will be included in the report: **Surname, Legal Forename, Date of Birth and Reg Group**. Inside square brackets next to the field name is the caption that will be displayed in the column header in the Word list or Excel spreadsheet.



10. If you would like to change the type of name fields that the report uses you can do so here. Currently the preferred surname and legal forename fields are used. Expand, by clicking on the **+**, the **Chosen Names** and **Legal Names** groups in the list of possible fields to see the choices and combinations of name fields.



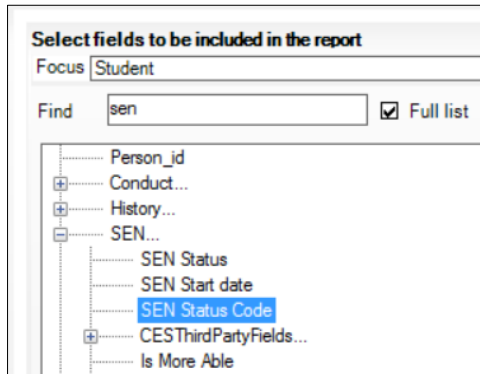
To add a field, click on it to select it and click on the green, right pointing arrow  (or double click on the field).

To remove an unwanted field, select it in the main area and click on the green, left pointing arrow  .

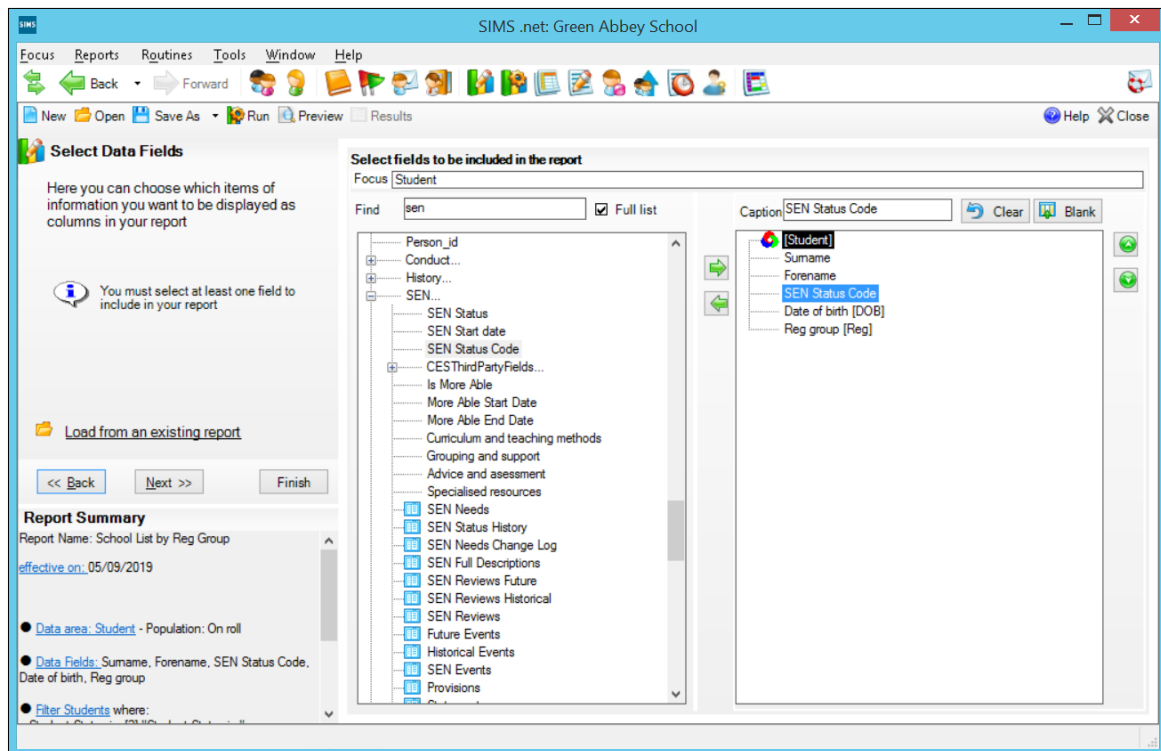
To change the order of the fields in the main area, use the green up and down arrows in the right margin.



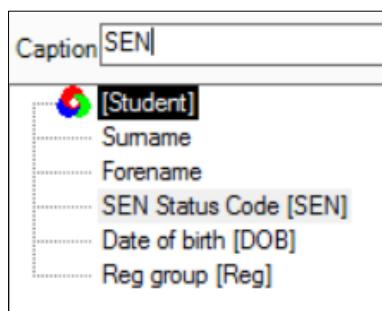
11. Type **SEN** in the **Find** field to help find the field named **SEN Status Code** in the **SEN** group.



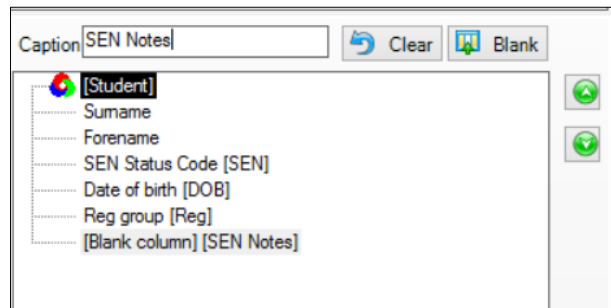
12. Add this field to the report by clicking the green right arrow, or by double-clicking the field name.
13. Using the green up arrow, located on the right of the screen, move the **SEN Status Code** field so that it is above **Date of birth**.



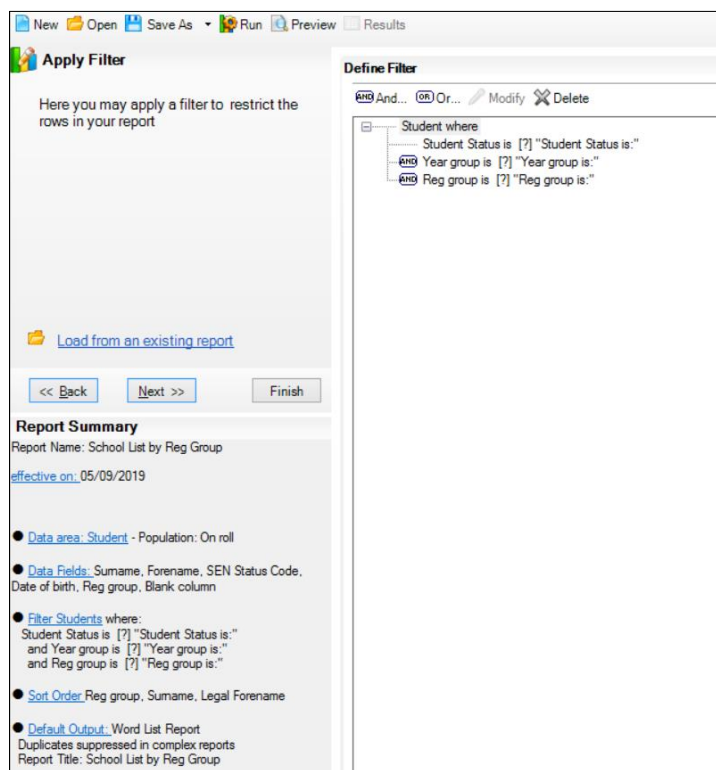
14. With **SEN Status Code** selected in the main area on the right, in the **Caption** field at the top, edit the caption to say **SEN**.



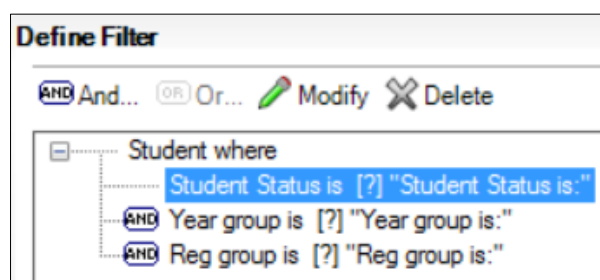
15. Click on **Blank** at the top right of the main area to add a blank field to your report. Move it to the bottom if necessary and edit the caption to read **SEN Notes**.

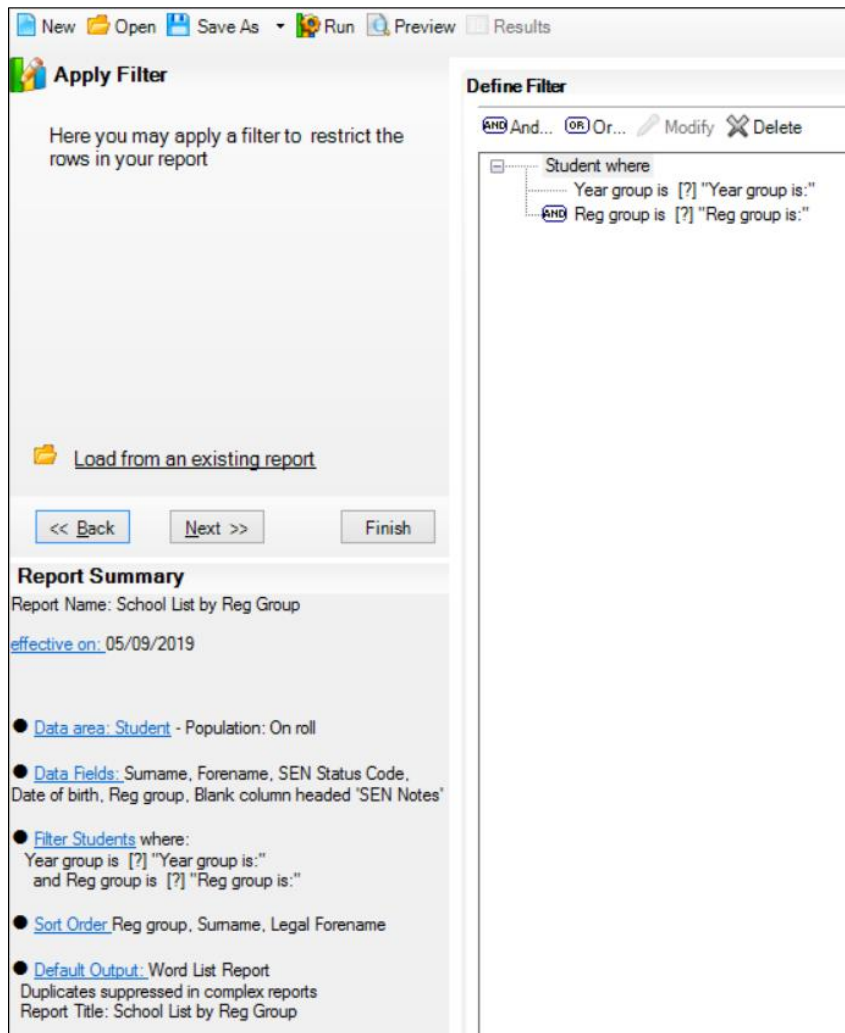


16. With the required fields selected, click **Next** to move on to the next step of the wizard, **Apply Filters**. The main area displays the filters that have been set for this report, you can also see them in the **Report Summary** on the bottom left of the wizard window, where it says **Filter Students**.



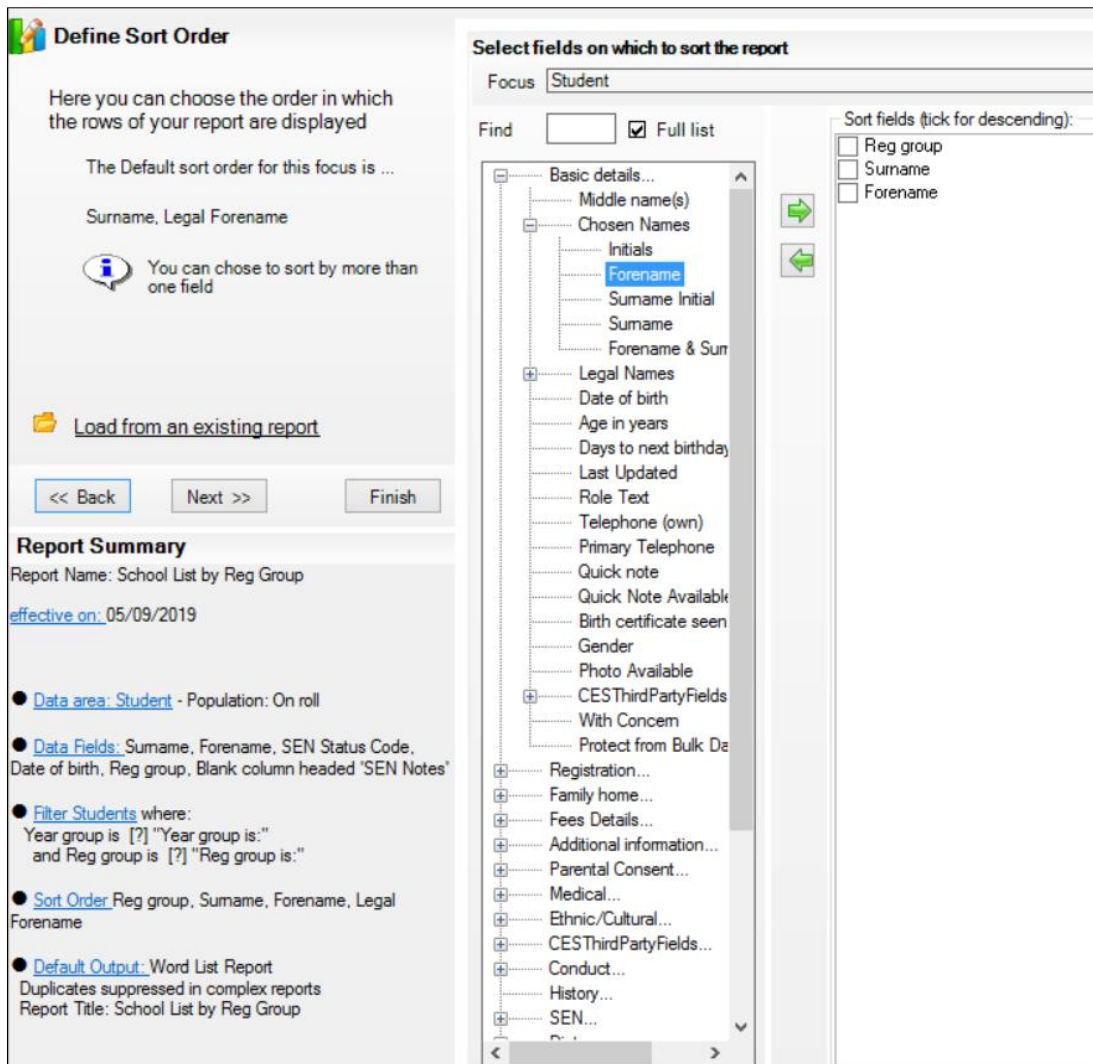
There are three filters in this report that have all been set up as run time parameters. That is to say to be completed by the user at run time as we saw when we ran the report. This is denoted by the [?] in each line, for example, **Year group is [?] "Year group is"**. The focus of the report is **On roll Students**, so it makes no sense to then ask the user whether they require leavers in the report. Remove the first line of the filter, **Student Status is [?] "Student Status is"** by clicking on that line to select it and clicking on **Delete**.





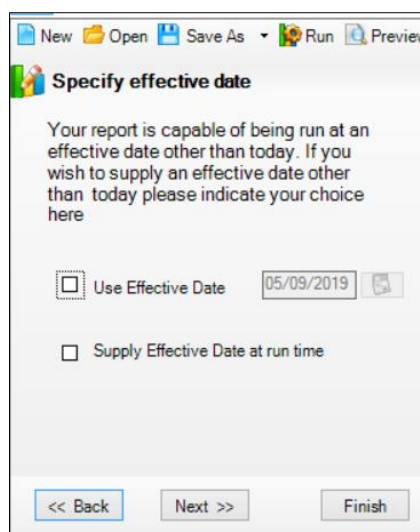
17. Click **Next** in the wizard to move on to the next step, **Define Sort Order**.
18. The default sort order is **Surname, Legal Forename** that is applied even if the report designer does not specify a sort order. In the main area on the right Reg group has been selected as the sort criteria. Notice in the **Report Summary**, in the bottom left of the wizard window, **Reg group** is the primary sort followed by the **Surname** and then **Legal Forename**. So the students will be grouped by reg group and sorted by name within each reg group.

If you changed the name type fields (legal or chosen) in the first step of the report design wizard you may want to specify which name fields are used to sort the students as well, so they are sorted by the name that is displayed.



Notice the **Sort Order** in the **Report Summary**.

19. Click **Next** to move on the next stage of the wizard.



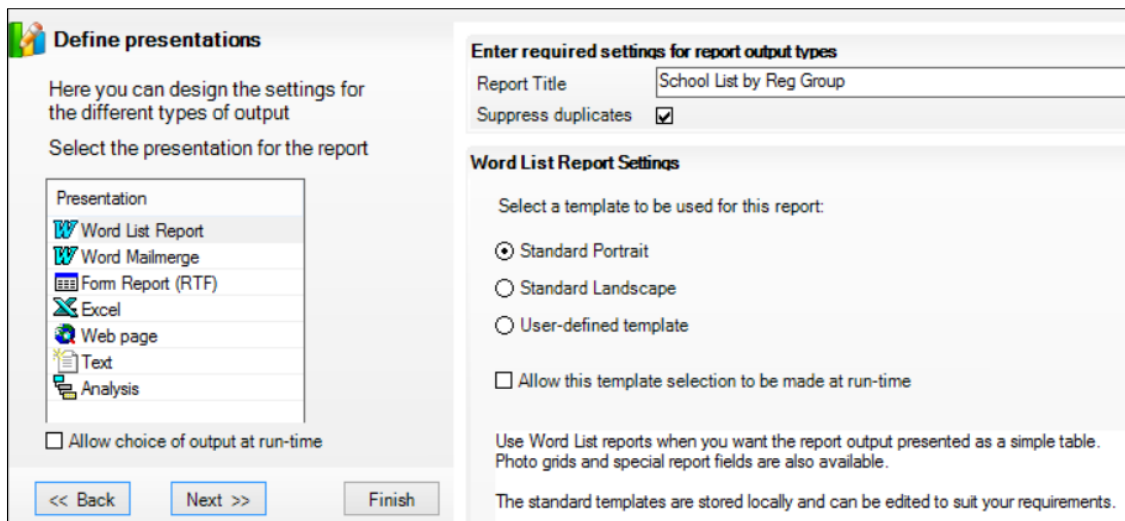
20. Not required in our example, but an effective date can be specified by selecting the **Use Effective Date** check box and the required date from the calendar.

Default reports will gather the information as it stands at the moment the report is run. Sometimes reports are required with information on a set date, for example last census day. This part of the wizard enables an effective date to be set, or more versatile, to prompt the report user to enter the required reference date each time the report is run by selecting **Supply Effective Date at run time** instead.

NOTE: The effective date is a Group Membership filter. If a pupil changed surname last week and a report was run with an effective date before this change, then the previous surname would be displayed.

21. Click **Next** to move onto the **Define Presentation** step of the wizard.

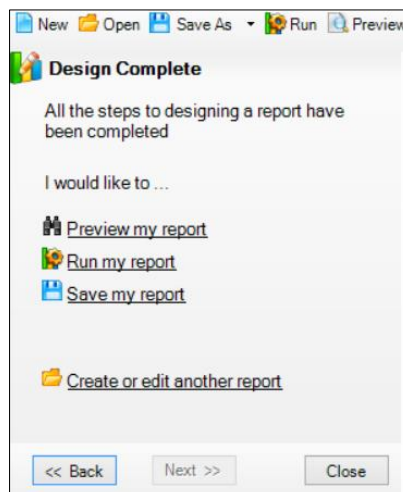
The wizard shows the presentation type. This could be Word, Rich Text Format, Excel, Web page, Text or Analysis and is selected from the list on the left of the wizard window. The right side shows the settings relevant to the presentation type selected.



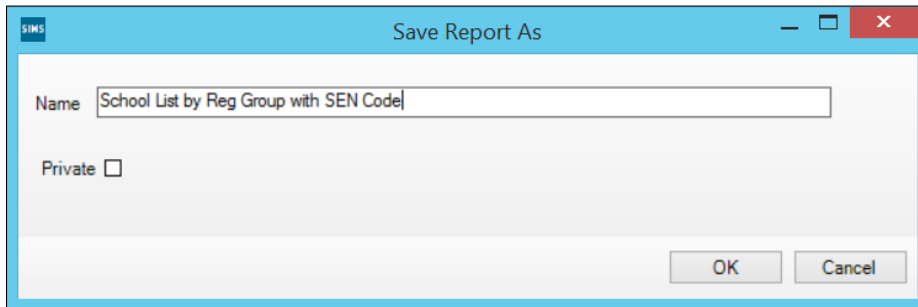
Here the **Word List Report Settings** show that the output will be presented using the **Standard Portrait** template. At the top is a field for the title of the report that will be inserted above the table on the first page only.

Edit the report title to read **School List by Reg Group with SEN**.

22. Click **Next** to move to the last step of the wizard. The **Design Complete** step has hyperlinks to **Preview my report**, **Run my report** and **Save my report** as well as to **Create or edit another report**. There have also been tools at the top of the wizard on each step to save, run and preview the report.

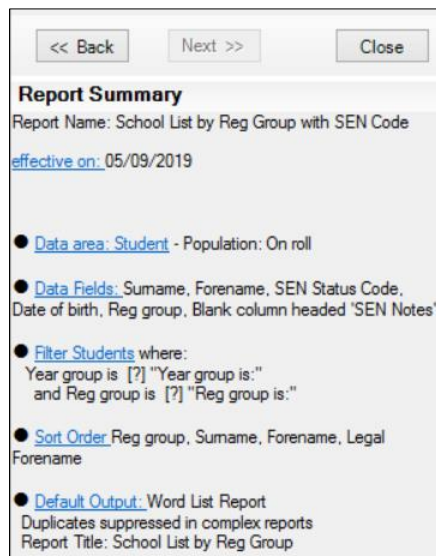


23. As the original report we have edited was not our own the **Save As** tool and the **Save** hyperlink option will both prompt for a name to be entered. It doesn't matter which one is used. **Save** the report with the name **School List by Reg Group with SEN Code**.

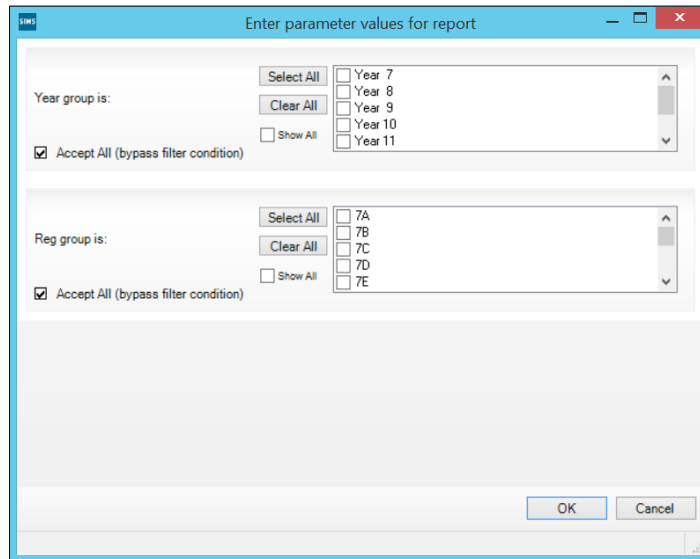


The **Private** check box enables you to save the report so that only you can see the report. If you were creating reports for others to run then you should not select this check box, otherwise other staff will not be able to see and run them.

24. Click **OK**. Notice that **Back** and **Next** move back and forth through the wizard. Clicking the hyperlinks in the **Report Summary** will take you straight to that step in the wizard.



25. Run the report using either the link or tool at the top. Notice there are now only two run time parameters, to select **Year group** and **Reg group**. Whilst within the design **Accept All** years and reg groups and click **OK**.



Notice that the **SEN Code** and **Blank column** are now displayed with a heading of **SEN** and **SEN Notes**.

School List by Reg Group

Surname	Forename	SEN	DOB	Reg	SEN Notes
Adams	Adam		31 August 2005	10A	
Biggar	Davina		16 June 2005	10A	
Black	Shauna		31 May 2005	10A	
Danny	Abe		01 September 2004	10A	
Daskalos	Carl	K	24 November 2004	10A	
Evans	Frankie		10 October 2004	10A	
Evans	Michael		05 April 2005	10A	
Gafferty	Felix		03 May 2005	10A	
Gallagher	Kingston		15 October 2004	10A	
Hacket	Charlie		13 December 2004	10A	
Half	Penny		22 December 2004	10A	
Hoxton	Kay		22 July 2005	10A	
Johnson	Nia		09 October 2004	10A	
Johnston	Rick		27 July 2005	10A	
Lewis	Owen		08 February 2005	10A	
Ling	Xing	K	30 December 2004	10A	
Oakley	Evan	K	05 January 2005	10A	

26. Close the Word document without saving. **Close** to close the report design wizard in SIMS.

NOTE: Do not save the Word file as information soon goes out of date; it is better to run this report again in SIMS when an up to date list is needed, rather than having a Word document saved.

Activity – Adding Additional Fields to a Staff Report

It has been suggested that the Staff Telephone Numbers report should also contain details of next of kin. Using the Staff Telephone Numbers report add the name of the next of kin. Save the report as Staff Telephone Numbers with NOK.

04

Creating New Reports

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Chapter Introduction

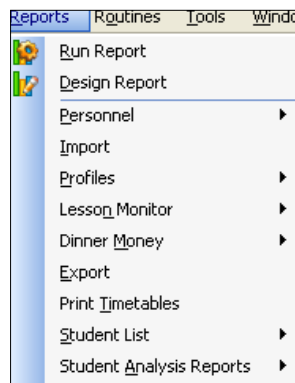
We have looked at running previously designed reports and edited them to suit. Now we will look at creating a report.

Scenario – Creating New Reports

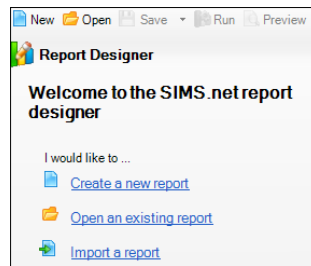
The head teacher would like a list of all pupils with their special needs, registration group and ethnicity. The report should also include whether the pupils are more able formerly known as gifted and talented.

Step by Step – Creating New Reports

1. Select Reports | Design Report.

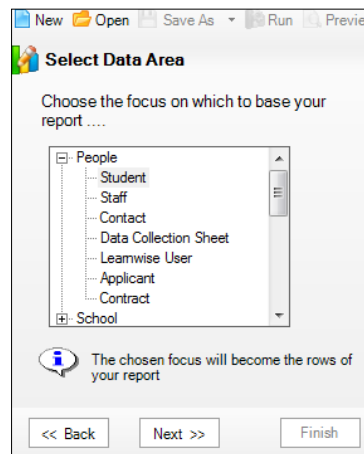


2. Click the **Create a new report** hyperlink.

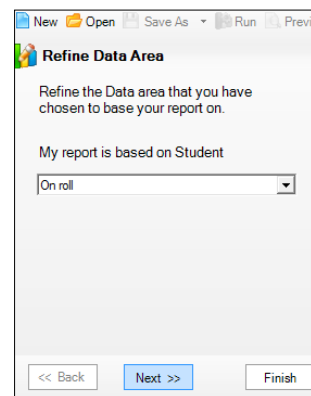


When creating a report from scratch, the first step is to select the data area the report is to be based on. To decide upon the data area, you should consider the main focus of the report. Often the report is pupil based, so the **Student** data area would be used, but if you are interested in the pupils in an academic class then you would need to use the **School | Class** data area.

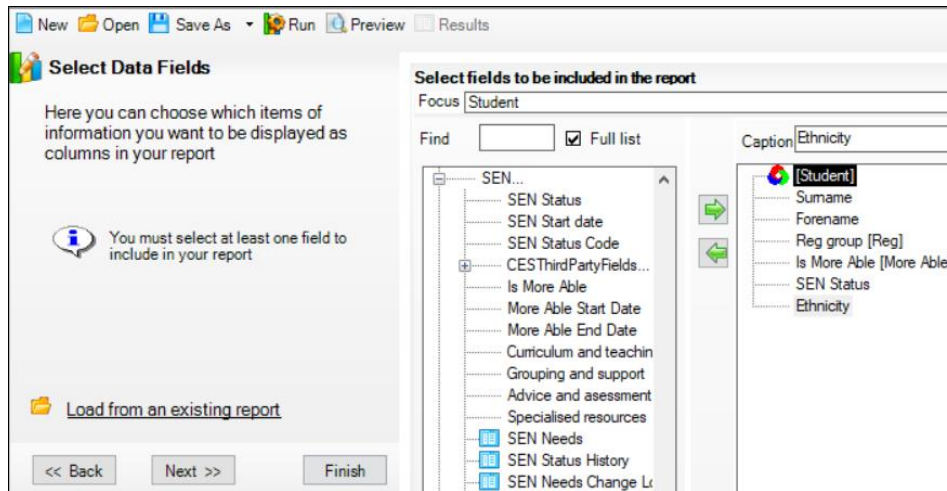
3. Select **Student** in the **Select Data Area** screen and click **Next**.



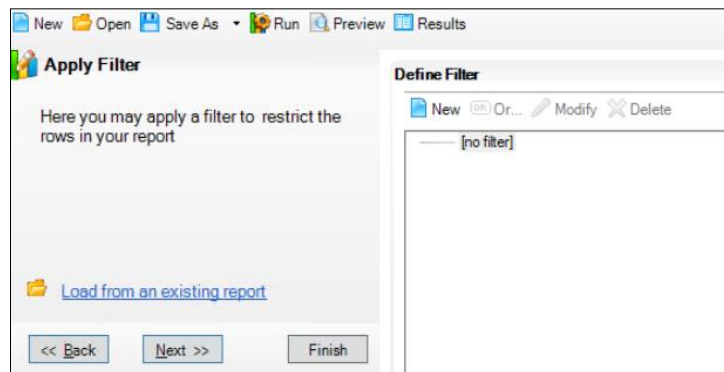
4. The report will only be on pupils that are on roll so click **Next**.



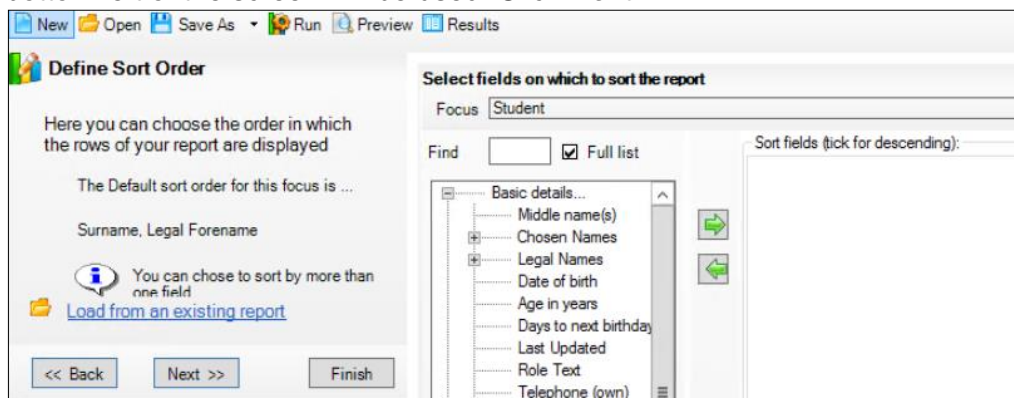
5. Select the **Surname, Forename** (from Chosen Names), **Reg Group, Is More Able, SEN Status** and **Ethnicity** report fields and click **Next**.



6. A filter will not be applied as the whole school is required in the report, click **Next**.



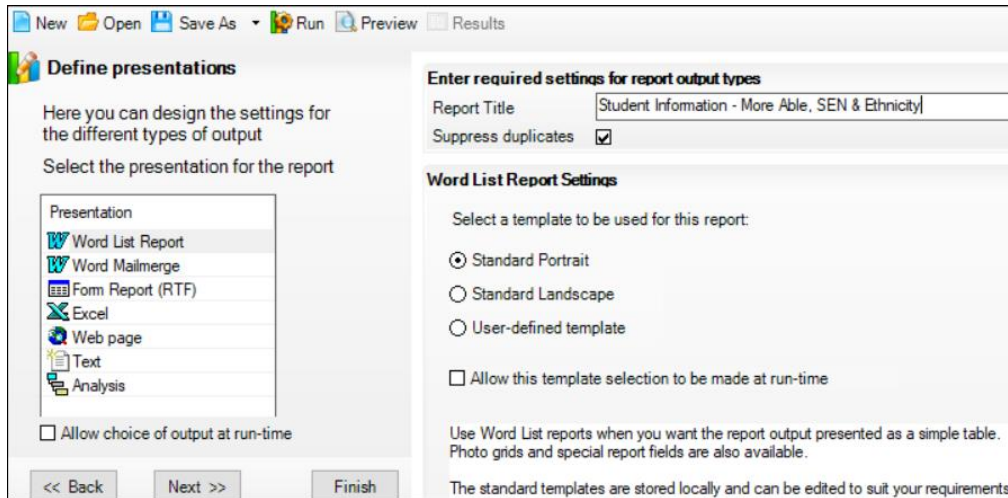
7. No changes need to be made to the **Define Sort Order** screen as the default sort order of **Surname, Legal Forename** which can be seen listed in the **Report Summary** on the bottom left of the screen will be used. Click **Next**.



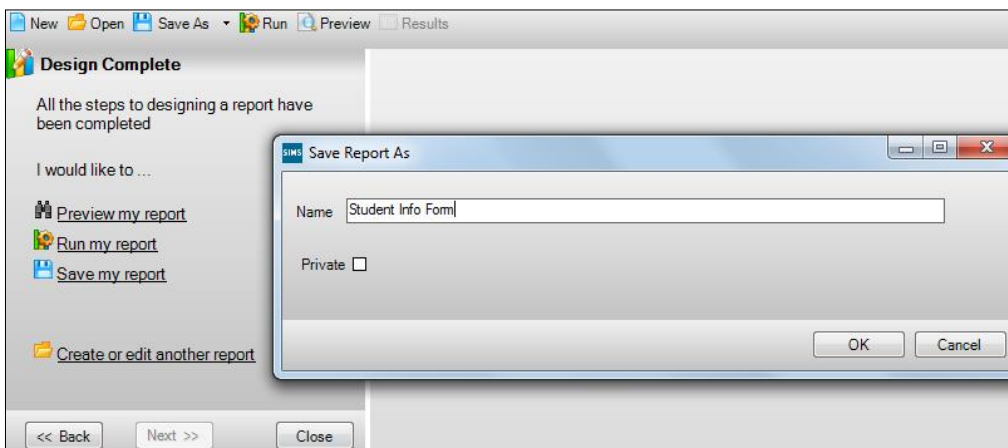
NOTE: Load from an existing report enables you to open previously saved definitions relating to data fields, filters and/or sort orders.

8. The report is to be run as of today so no need to use an effective date. Click **Next**.

9. Select **Word List Report** in the **Presentation** panel and type **Student Information – More Able, SEN & Ethnicity** in the **Report Title** field.



10. Click **Save As** and name the report **Student Info Form**. Deselect the **Private** check box. Click **OK**.



11. Click **Run** and view the report in Word. Close Word without saving.

Scenario – Creating a Report from Scratch for Travel Planning

The head teacher has been asked by the LA to provide a list of pupils and post codes for travel planning within the authority.

Step by Step – Creating a Report from Scratch

1. If you still have the design wizard open from the previous report click on the hyperlink **Create or edit another report**. Otherwise click on **Design Report**.
2. Create a new report focused on **Students** who are **On Roll**.
3. Select the **Legal Surname**, **Legal Forename** and **Postcode** report fields.
4. As the whole school is required in the report there is no need to define a filter.
5. Set the sort order by **Postcode**.
6. Bypass the **Specify Effective Date** step.
7. Select **Word List Report** in the **Presentation** field, with an output of **Standard Portrait**.
8. Save the report with the name **LA Travel Report**. Deselect the **Private** check box.

9. Run the report.
10. View the report in Word and close Word when finished without saving the document.
11. Close the report design wizard window in SIMS.

Scenario – Using AND and OR in Filters

The LA has now asked for the list to be provided for the pupils who have a Milton Keynes (MK) or Peterborough (PE) post code.

Step by Step – Using AND and OR in Filters

1. Click on **Design Report** and the **Open an existing report** hyperlink to display the **Open report** dialog and select the **LA Travel Report** report from the **My Reports** folder.
2. Click the **Filter Students** hyperlink to display the **Apply Filter** step.
3. Click **New** to add a new filter.
4. Find the **Postcode** field and make sure the **Condition** is **Begins** and put the **Value** in as **MK**. Select the **Prompt at runtime** check box so that when the report is run the post code value can be altered, if required. Click **OK**.

NOTE: Pupils with a Milton Keynes (MK) or Peterborough (PE) post code are required. To achieve this use OR.

5. Click the line which says **Students Where**, this will then enable **OR** to be used.
6. Click **OR** and again find the **Postcode** field.
7. Make sure the **Condition** is **Begins** and put the **Value** is **PE**, select the **Prompt at runtime** check box, then click **OK**.
8. Select **Save As** from the **Save** drop-down list and name the report **LA Town Travel Report**. Click **OK**.
9. Click **Run**, and then **OK**.
10. After looking at the output click **Close**.
11. Click **Close**.

NOTE: These next few steps show that if AND was used instead of OR, there would be no results.

12. Using the same report click the **Filter Students** hyperlink to display the **Apply Filter** screen.
13. Click the line that says **OR Where** and then **Delete**.
14. Click **AND**.
15. Find the **Postcode** field and ensure the **Condition** is **Begins** and put the **Value** as **PE**.
16. Select the **Prompt at runtime** check box then click **OK**.
17. Without saving the report click **Run** and then **OK** to run it.
18. A message saying there are no results for this report query will probably be produced, click **OK**. Therefore, no one has a post code which starts with both MK and PE.
19. Click **Close**.

Activity – Modifying your Own Reports

The LA has now asked for the date of birth to be added to the LA Travel Report; add this field and save the report.

Activity – Using Reports to Check Data

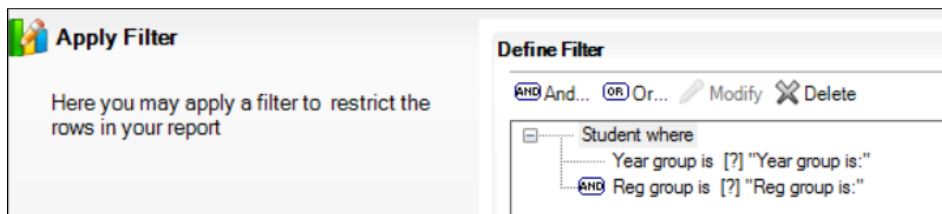
The school wants to prepare for census. They want to check that all pupils have a UPN. Create a report to check for pupils who have no UPN recorded.

Scenario – Adding a Filters

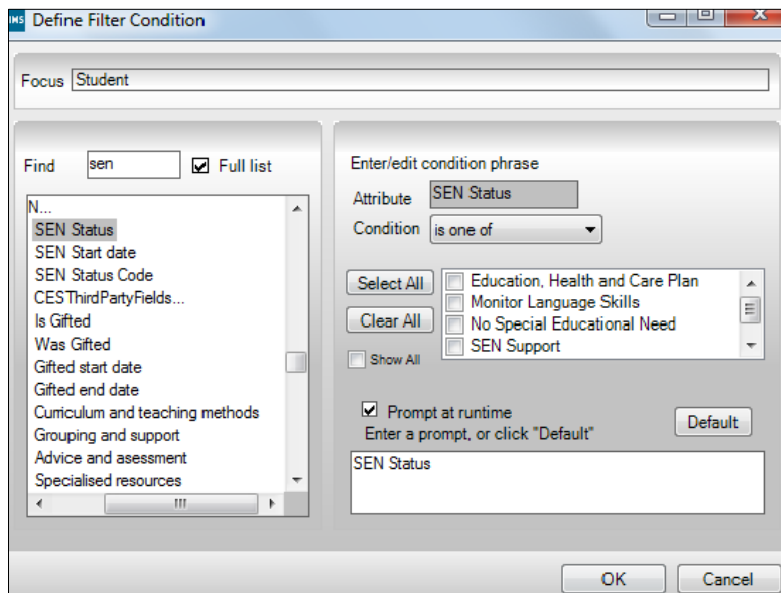
The special needs co-ordinator would like the **School List by Reg Group** report to only show pupils on roll with a **Special Needs** status.

Step by Step – Adding Filters

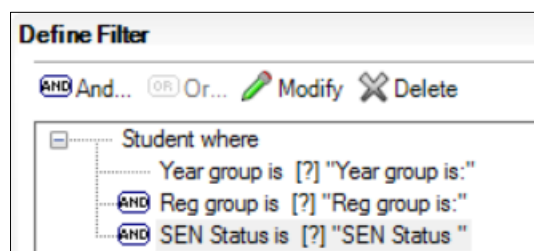
1. Select **Reports | Design Reports** and click the **Open an existing report** hyperlink to display the **Open Report** dialog.
2. Click the **My Reports** folder and select the **School List by Reg Group with SEN Code** report from a previous step by step exercise. Click **OK**.
3. Click **Next** twice or click the **Filter Students** hyperlink.
4. Currently there are two run time filters, for **Year group** and **Reg group**.



5. Add an additional filter for students only with a **SEN Status**. Click **And** to display the **Define Filter Condition** dialog, and then find and select the **SEN Status** field.



6. Select the **Prompt at Runtime** check box and click **OK**.



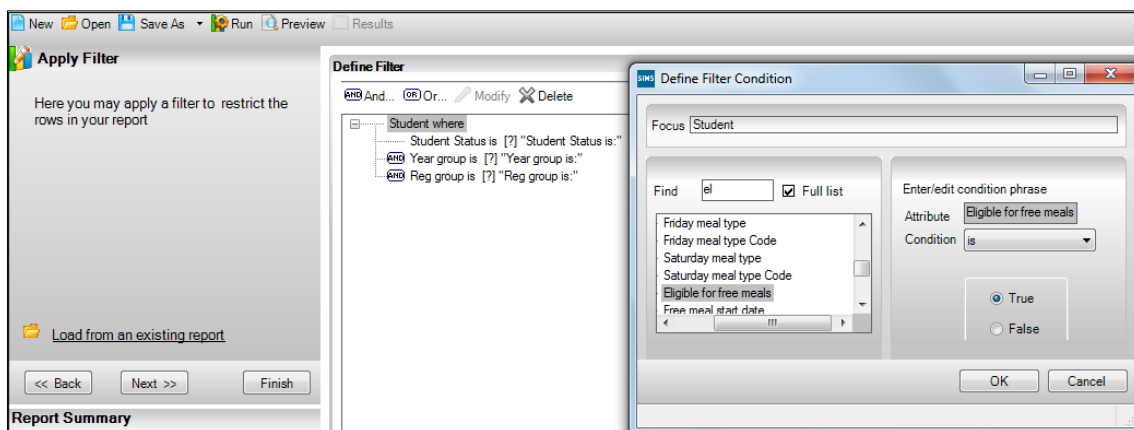
7. Save the report with the same name.
8. Run the report by selecting a year group, bypass the reg group filter and select the **SEN Status of Education, Health Care Plan and SEN Support**. The report will show a list of students in the year group chosen with one of the SEN categories selected.
9. Close the Word document and run the report again this time for years 7, 8 and 9 just with the **SEN Status of SEN Support**.
10. Close the Word document and the SIMS report design wizard without further saving (as it was already saved in step 7 above).

Scenario – Using Filters not in the Design

The school requires a quick list of those pupils who are eligible for free school meals . So far you have used a field in the filter already used in the report data fields. You will now see that you do not have to only use those fields that have been selected for the report.

Step by Step – Using Filters not in the Design

1. Select **Reports | Design Report** and click the **Open an existing report** hyperlink.
2. Expand **Focus**, select the **Student** folder, and then select the **School list by Reg Group** report. Click **OK**.



3. Click **Next** twice to display the **Apply Filter** screen. In the **Define Filter** section, click **And** and find the **Eligible for free meals** field. Select the **True** radio button, and then select the **Prompt at Runtime** check box.
4. Click **OK**.

5. Click **Run** and select the **On-roll** check box, select the **Accept All (bypass filter condition)** check box in the **Year Group** and **Reg Groups** fields to accept all year groups and reg groups, then scroll down to make sure that the **True** radio button is selected for the **Eligible for free meals** field.

The report will list names, dates of birth and registration groups for those pupils who are eligible for free school meals, without showing the eligible for free school meals field .

6. **Close** Word.
7. Click **Save As** and name the report **FSM Register**.
8. Click **OK**.
9. **Close** the Wizard.

Activity – Birthday List

The Birthday List needs to be altered to only show pupils who are in the school and have a birthday in the next seven days.

- Using And, add a Days to next birthday filter on the Define Filters screen, making sure the Condition and Value are correct, for example, a Condition of Less Than and a Value of eight.
- Save the report as Birthdays in next seven days.

Activity – Teacher Numbers

The school is trying to update its Staff information and you have been asked to make sure that all teachers have a Teacher Number or a NI number recorded.

- Create a new Staff report based on Teaching Staff, all Current containing the Full Name, Teacher Number and NI Number fields.
- Using the And/Or functionality on the Define Filters screen add a new filter of Teaching Number with a Condition of is null together with a new filter of NI number with a Condition of is null.
- Save the report as Teaching Staff –Teacher/NI Number Check.

Activity – Missing Student Photos

A number of pupils missed the school photographs due to illness. This means that the school does not have their photos in SIMS, so they have decided to take the missing photos in school.

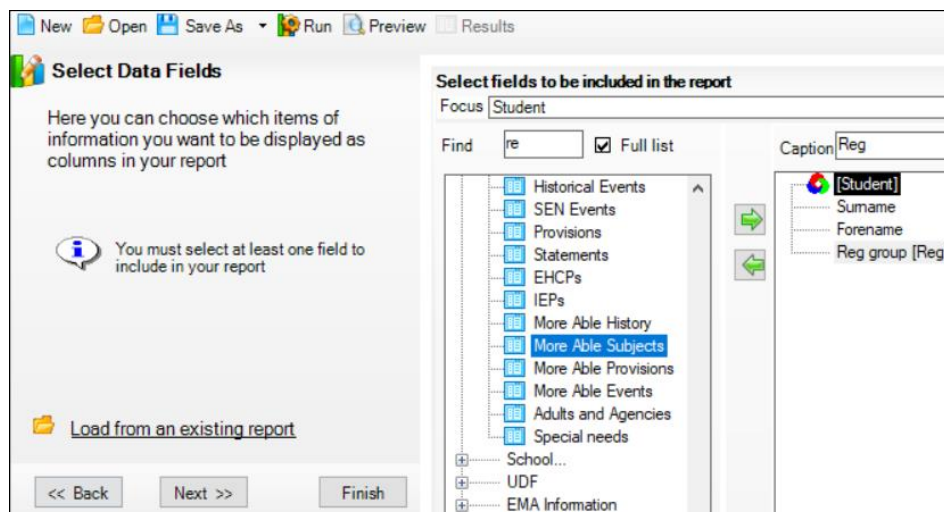
- Using the Photographs report find pupils with no (false) photograph by using And on the Define Filters screen to add a Photo Available with a Condition of False filter. Save the report as Photographs Missing.

Scenario – Adding Sub-Reports

The head teacher has asked for a list of more able pupils including the subject in which they are.

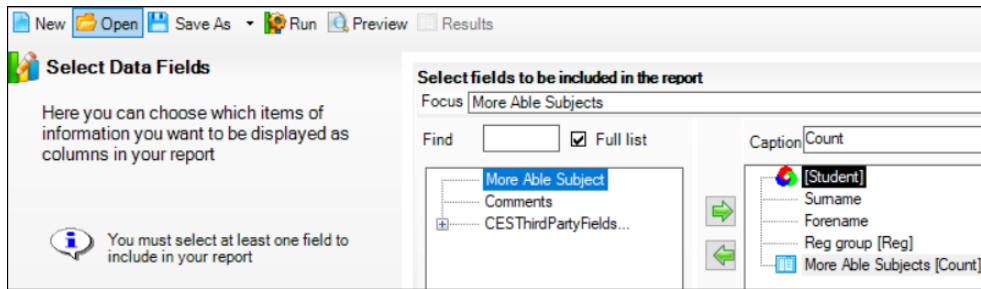
Step by Step – Adding Sub-Reports

- Select **Reports | Design Report** to display the **Report Designer** screen.
- Click the **Create a New Report** hyperlink.
- Click **Next** twice to select **Student** from the **Select Data Area** screen and **On-Roll** from the **Refine Data** area screen.
- In the **Select Data fields** screen double-click **Forename**, **Surname** (from Chosen Names) and **Reg Group** to select the fields.
- Scroll down the list of fields and click on the **+** next to **SEN**.
- Scroll down the list of fields and find the **More Able Subjects** blue box (sub-report). The blue box shows that this is a one to many relationship, as a pupil may have more than one More Able subject.



The **blue** box is the top level of the sub-report data area and contains many different fields related to the sub-report; the underlying fields are accessed by double clicking the sub-report name.

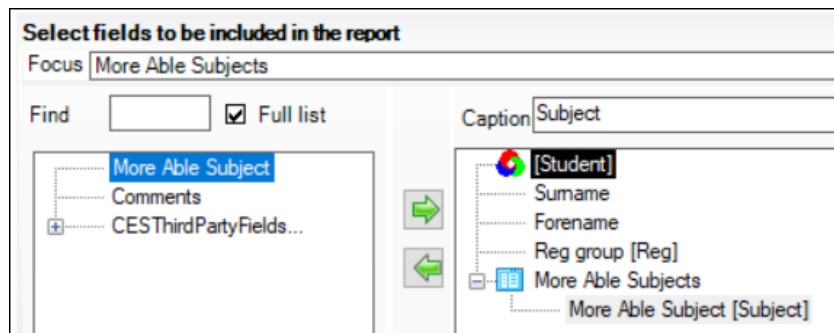
- Double-click **More Able Subjects** and notice that the fields on the left-hand side change.



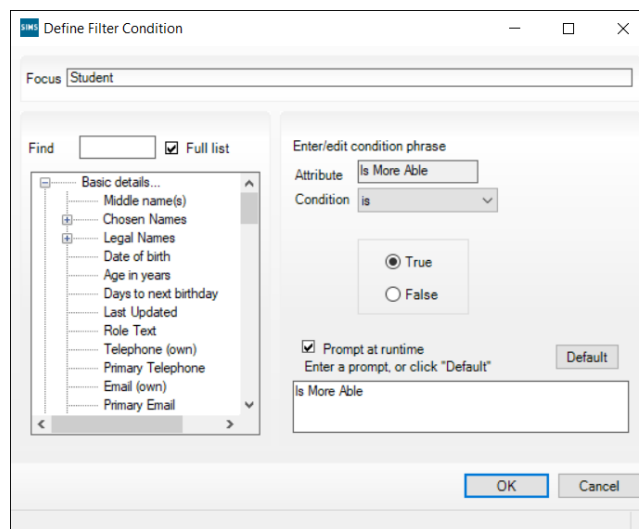
You are now looking at the fields inside the sub-report. In the **More Able Subjects** sub-report you can see **Comments** for example.

If you were to leave the report fields for a moment and run this report, then an output which has a pupil's name, registration group and then number (a numerical count) of the pupil's more able subjects will be displayed. Notice that next to the blue box on the right-hand side are the words **More Able Subjects [Count]**.

8. You want some information about the more able subjects, so select the **More Able Subject** field. Notice that **More Able Subjects** no longer has **[Count]** next to it.

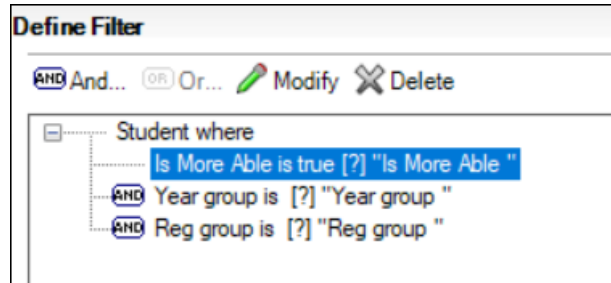


9. Click **Next** to display the **Apply Filter** screen.
10. Click **New** to display the **Define Filter Condition** dialog.
11. Find the **Is More Able** field; select the **True** radio button, and then select the **Prompt at Runtime** checkbox.



12. Click **OK**.
13. Click **And**.
14. Locate the **Year Group** field and ensure **is one of** is selected from the **Condition** drop-down list.

15. Select the **Prompt at runtime** check box and click **OK**.
16. Click **And** and find the **Reg Group** field.
17. Ensure **is one of** is selected from the **Condition** drop-down list and select the **Prompt at runtime** check box.
18. Click **OK**.



19. **Run** the report and select the **Accept All (bypass filter condition)** check box in the **Year Group** and **Reg Groups** fields to accept all year groups and reg groups. Make sure that the **True** radio button is selected for the **Is More Able** field.

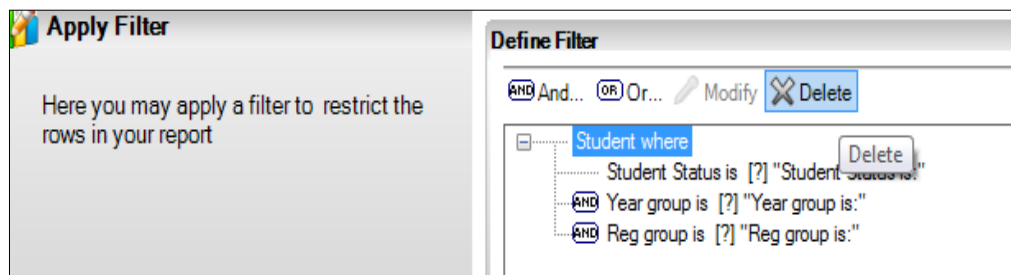
The report will list names, registration groups and more able subject(s) for those pupils on the More Able register.

Scenario – Adding Filter as an Academic Class (not applicable to primary schools)

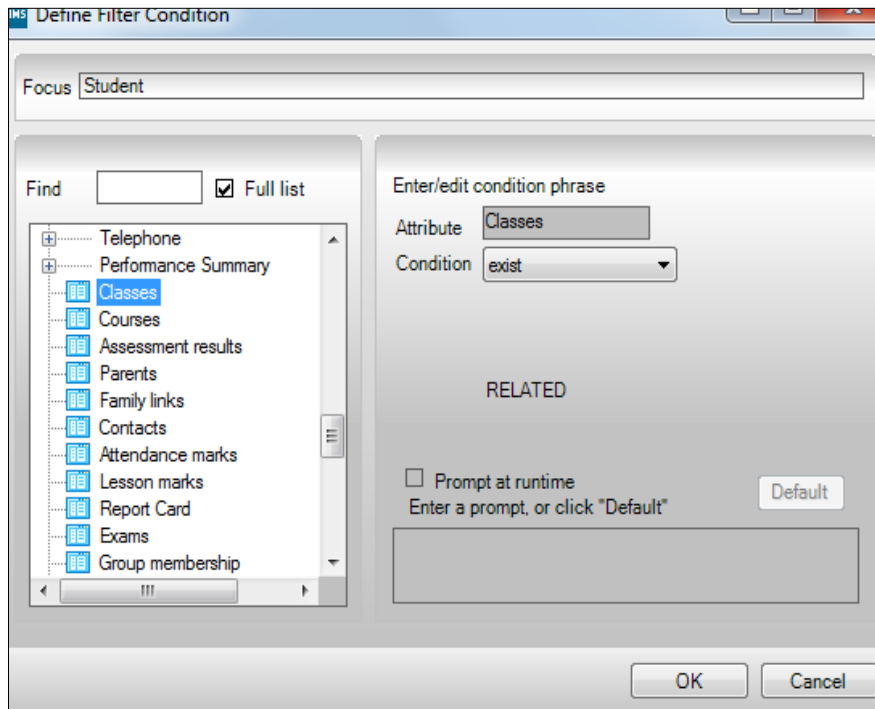
Ms Estephan would like the **Cultural** and **Ethnic** information report for her **Year 9 French** class.

Step by Step – Adding Filter as an Academic Class

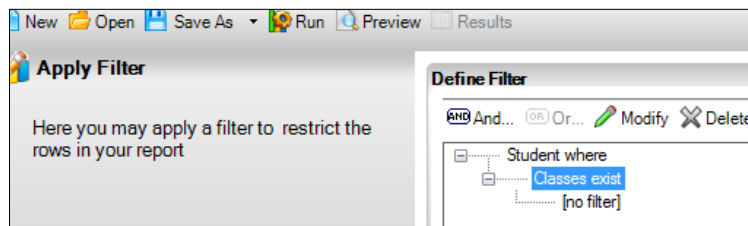
1. Select **Reports | Design Report** or click **Design Report**.
2. Click the **Open an Existing Report** hyperlink and expand the **Focus** folder.
3. Click the **Student** folder and select the **Cultural and Ethnic information** report.
4. Click **OK** and then **Next** to display the **Select Data Fields** screen. No changes need to be made to this screen.
5. Click **Next**.
6. Currently the filter is on **Student Status is ?** and **Year Group is ?** and **Reg Group is ?**. Remove this filter by highlighting **Student where** and click **Delete**.



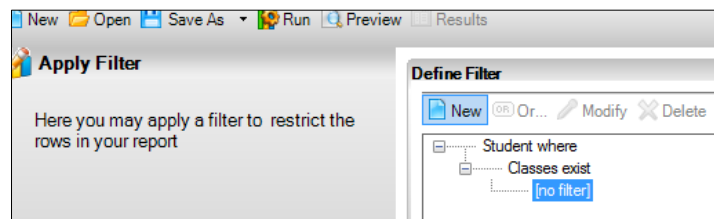
- Click **New** to display the **Define Filter Condition** dialog. Scroll down the list of fields and select the **Classes** blue box (sub-report).



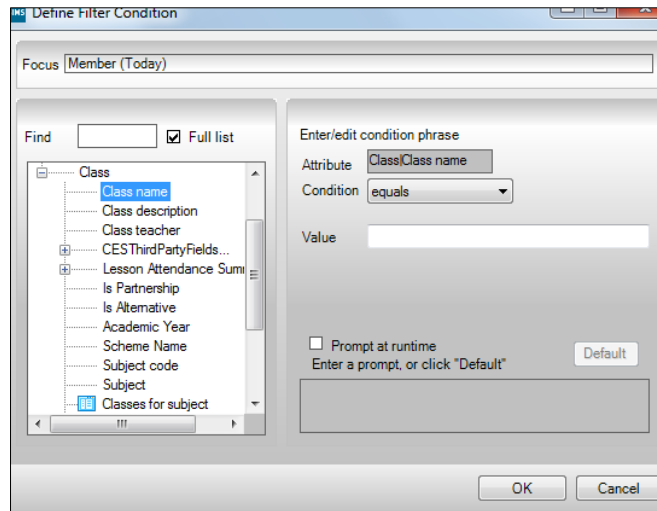
- Click **OK**.



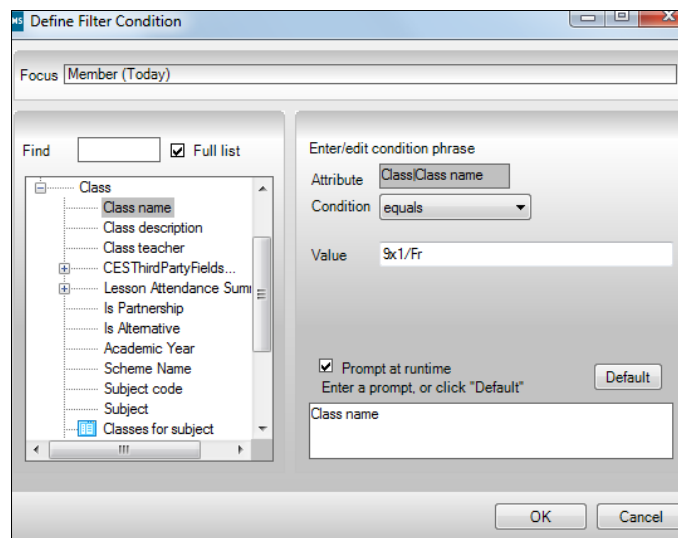
- Select **[no filter]** and click on **New**.



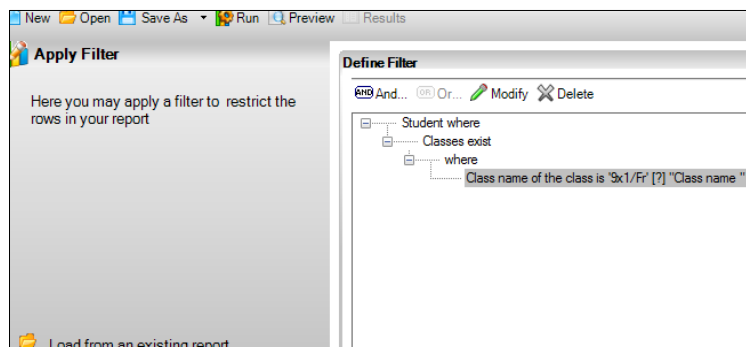
- Expand **Class** and highlight **Class Name**.



11. Ensure that the **Condition** is set to **equals** and type **9x1/Fr** into the **Value** box. Select the **Prompt at run time** check box.



12. Click **OK**.



13. Save the report as **Cultural and Ethnic Information by Class**.

14. **Run** the report. When the **Enter parameter values for report** box is displayed, check that the details in the **Value** box are correct and click **OK**.

15. The report will list the Cultural and Ethnic information for pupils in Ms Estephan’s class, 9x1/Fr. The graphic below is an example.

CULTURAL AND ETHNIC INFORMATION								
Surname	Forename	Adno	Year	Reg	Ethnicity	Ethnic category	Home language	Religion
Aaron	Chris	004986	Year 9	9A	White - English		English	Christian
Appleby	Candice	004998	Year 9	9A				
Birch	Paige	005007	Year 9	9C	White - English		English	Christian
Brown	Louis	005010	Year 9	9A	Black - Somali		English	No Religion
Brown	Royston	005011	Year 9	9B	White - English		English	No Religion
Coldwell	Jessica	005019	Year 9	9C	White - English		English	Refused
Cortez	Anna	005021	Year 9	9A	White European		English	Christian
Elliot	Francis	005033	Year 9	9A	White - Irish		English	Other Religion
Emerson	Huw	005034	Year 9	9A	White - Welsh		English	No Religion
Fell	Mia	005035	Year 9	9B	White - English		English	Christian
Fenchurch	Ella	005036	Year 9	9C	White - English		English	Christian
Henderson	Elliot	005057	Year 9	9A	White - English		English	No Religion
Jones	Bryn	005067	Year 9	9C	White - Welsh			
Kall	Keith	005070	Year 9	9A	White - English		English	No Religion
Lakeson	Mark	005079	Year 9	9C	White - English		English	Christian
Lisi	Anna	005081	Year 9	9A	Italian		Italian	Christian
Nelson	Lee	005091	Year 9	9C	White - English		English	No Religion
Newman	George	005093	Year 9	9A	White - English		English	Christian
Rede	Jack	005104	Year 9	9B				

16. Close the Word document and the SIMS report design.

05

Previewing Reports

This chapter contains:

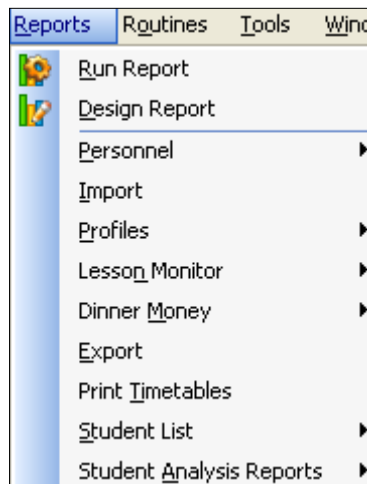
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Chapter Introduction

Preview enables you to view the report before running it in Word or Excel. It enables you to alter the sort order of the report easily. Sometimes you need to be able to run a report for a collection of pupils who have nothing obvious in common, this can be done by using **Preview**.

Step by Step – Using Preview

1. Select **Reports | Run Report** or click **Run Report**.



2. Expand **Focus**, and then select the **Student** folder.
3. Select the **School List by Reg Group** report; be careful not to double click the report.

- Click **Preview** and notice that the **Enter parameter values for report** dialog appears in the same way as when a report is run.

- Select **On Roll** pupils and select a year group, for example, year **10** or year **3**, and then select an appropriate registration group. Click **OK**.

Name	Focus	Owner	Supplier	Updated	Category
School Leavers	Student	Imported	CES Reporting Services	17/11/2005	Public
School List by House	Student	Imported	CES Reporting Services	22/06/2018	Public
School List by Reg Group	Student	Imported	CES Reporting Services	22/06/2018	Public
School List by Year Group	Student	Imported	CES Reporting Services	22/06/2018	Public
School List in Alphabetical Order	Student	Imported	CES Reporting Services	22/06/2018	Public
School List: Alphabetical Order	Student	Imported	CES Reporting Services	17/11/2005	Public
School List: House Order	Student	Imported	CES Reporting Services	17/11/2005	Public
School List: Reg Group Order	Student	Imported	CES Reporting Services	17/11/2005	Public
School List: Year Group Order	Student	Imported	CES Reporting Services	17/11/2005	Public
SCPP Year 7 Report	Student	Imported	Green Abbey School	22/07/2015	Public
SEF B2.1 - Number of Learners	Student	Imported	CES Reporting Services	22/06/2018	Public
SEF B2.10 - Nature of learning difficulties	Student	Imported	CES Reporting Services	18/03/2011	Public

Surname	Forename	DOB	Reg
Anton	Tiger	09/02/2004	10A
Barbousci	Harold	24/05/2004	10A
Barnett	Jamie	14/02/2004	10A
Bond	Jamie	01/01/2004	10A
Dean	Margaret	05/06/2004	10A
Dolby	Peter	28/04/2004	10A
Drogba	Mandy	13/03/2004	10A
Hawkins	Chris	05/05/2004	10A

Notice that this time Word has not been opened, but instead the names that would be included in the report are displayed in the bottom half of the screen.

- Notice the **Rows** area; this tells you how many rows there are in the report, the number of rows are the number of pupils appearing in the list.
- Click the **DOB** heading and notice that the list has now been sorted in date of birth order.

Surname	Forename	DOB	Reg
Montana	Tyler	02/09/2003	10D
Montana	Toni	02/09/2003	10E
Montana	Alexia	02/09/2003	10F
Little	Simon	03/09/2003	10B
Thompson	Paul	07/09/2003	10A
Stephenson	Theodore	07/09/2003	10F
Price	Monica	09/09/2003	10B
Smith	Osias	09/09/2003	10C
Pery	Leah	09/09/2003	10D
Davies	Sophie	09/09/2003	10F

- Click the **Forename** heading; instead of being in date of birth order, the list is now in forename order.

Surname	Forename	DOB	Reg
Sanders	Abigail	18/02/2004	10C
Shearwood	Adam	14/02/2004	10C
Matthison	Alexander	20/05/2004	10B
Baker	Alexandra	01/08/2004	10D
Montana	Alexia	02/09/2003	10F
Sharp	Alfie	23/07/2004	10B
Paccino	Alphonse	24/04/2004	10E
Stone	Alyssa	09/05/2004	10F
Wilson	Amos	08/03/2004	10D
Coulson	Amy	28/05/2004	10D

- To export the report to Word, click **Run** (which is on the same line as **Preview Report Results**). Do not click **Run** at the top of the screen as this will output the report to Word in the original surname, forename order.

OMR Template	Report	Student	Imported	Green Abbey School	22/07/2015	Public
SCPP Year 7 Report	SEF B2.1 - Number of Learners	Student	Imported	CES Reporting Services	22/06/2018	Public
	SEF B2.10 - Nature of learning difficulties	Student	Imported	CES Reporting Services	18/03/2011	Public

Surname	Forename	DOB	Reg
Sanders	Abigail	18/02/2004	10C
Shearwood	Adam	14/02/2004	10C
Matthison	Alexander	20/05/2004	10B
Baker	Alexandra	01/08/2004	10D
Montana	Alexia	02/09/2003	10F

- Observe that the report is in forename order in Word, and click **Close**.

Scenario – Observing the Difference Between Preview and Actual Output

When the report detailed below is previewed, notice that many pupils appear twice or more. This is because this report shows contacts. Each pupil might have more than one contact, so the pupil’s details will be repeated for each of their contacts. However, the actual output is different when running the report in Word or Excel.

Step by Step – Viewing the Difference Between Preview and Actual Output

- Select **Reports | Run Report**. Expand **Focus**, then **Student**.
- Select the **Contact List with Main Telephone Numbers** report and click **Preview**.
- Select **On Roll** pupils and a year group, for example year **10** or year **3**.
- Bypass the **Filter condition** on **Reg Group** is by selecting the **Accept All (bypass filter condition)** check box.
- Click **OK** to preview the report.

6. Click the appropriate **Run** to output the report to Word.
7. Having looked at the report in Word and noticed how it differs from the preview, click **Close** to close Word. Click **Close** to close the **Report Browse** screen.

Scenario – Sorting a Report

The head teacher would like to have a list of all pupils with their ethnicities. This is needed in ethnicity order, so that pupils of the same ethnicity are shown together.

Step by Step – Sorting in Preview

1. Select **Reports | Run Report** and then the **Student Focus** report called **Cultural and Ethnic Information**. Click **Run**.
2. Select **On Roll** pupils and then a year group, for example year **10** or year **3**.
3. Bypass the **Filter** condition on **Reg Group is** by selecting the **Accept All (bypass filter condition)** check box. Click **OK**.

Notice that when this is output to Word the report is produced in alphabetical order. Ethnicity should show for most pupils.

4. This report is very close to what is required but not quite. Click **Close**.
5. This time preview the **Cultural and Ethnic Information** report using the same information selected before. Click **OK**.
6. This time the preview report results will show the list of pupils. Click the **Ethnicity** heading and notice that the list is now in ethnicity order.
7. Click **Run** to output the report to Word so that the report is in ethnicity order.
8. Having looked at the report click **Close**.

NOTE: So far you have seen that reports can be run for pupils who satisfy a filter, for example those that belong to a certain year, registration group, have a special educational need (SEN) and so on. You have also seen that the same reports can be run for individual pupils. Sometimes you need to be able to run a report for a collection of pupils that have nothing obvious in common, for example, those going on a foreign trip.

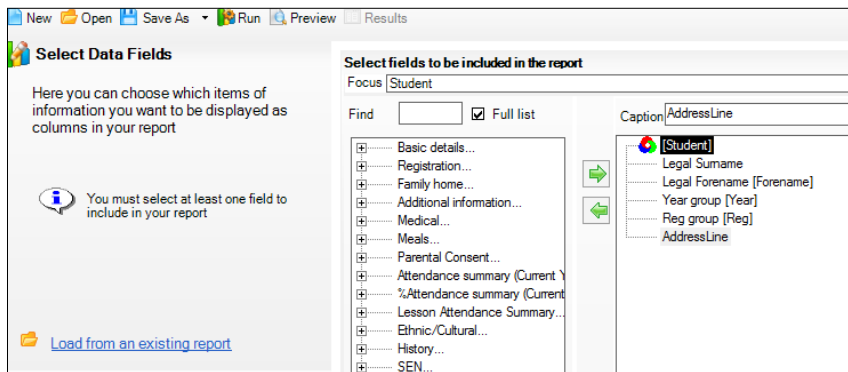
Scenario – Adding Students to a Trip List in Preview

A school trip to discover the cultural and physical aspects of the Lake District has been organised. Pupils from one of the school year groups have been invited. Many of the pupils have accepted but there are still some spaces on the buses, so a few other pupils from a different year group have been offered the opportunity. You now want to produce a list of pupils and their home addresses for the trip organisers to take with them.

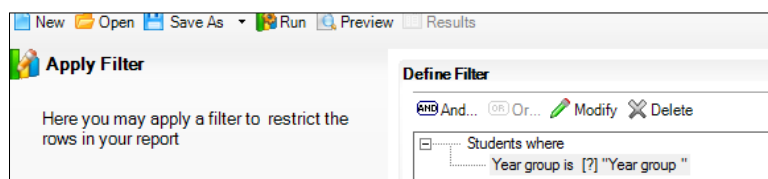
Step by Step – Adding Students in Preview

1. Select **Reports | Design Report**, then click the **Create a new report** hyperlink to display the **Select Data Area** screen.
2. Select **Student** as the data area and click **Next**.
3. The report needs to be for on roll students, click **Next** or click the **No Columns Specified** hyperlink.

- From the list of fields, select **Legal Surname, Legal Forename, Year Group, Reg Group** and **AddressLine**.



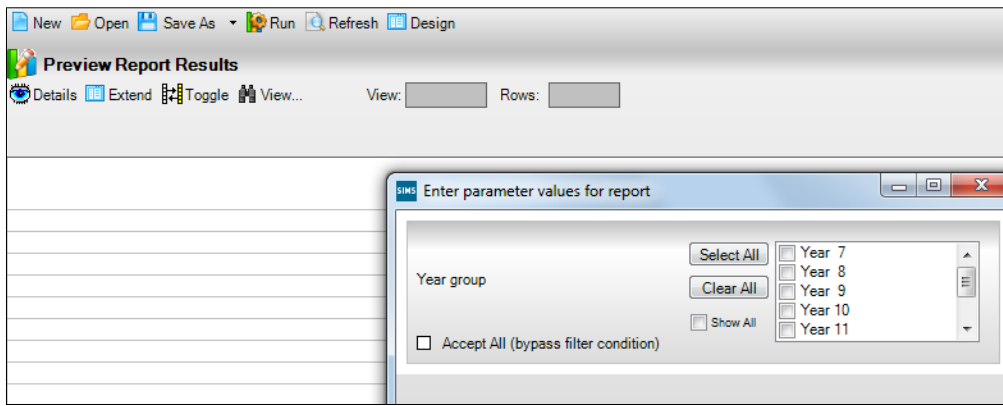
- Click **Next** on the wizard, or **Filter Students** hyperlink to display the **Apply Filter** screen.



- To filter a year group click **New**, find the **Year Group** field, and then select the **Prompt at Runtime** check box. Click **OK**.
- Click **Next** to display the **Define Sort Order** screen. No changes are necessary as the default sort order of **Surname, Legal Forename** (as shown in the top left-hand side of the screen) will be used.
- Click **Next** twice to display the **Define Presentation** screen, and then select **Word List Report**.
- Click **Save As** and name the report **Lake District Trip**.
- Deselect the **Private** check box and click **OK**.



- Click **Preview**.



12. Select any year group, for example, year 7 or year 6. This is the main year group going on the trip. Click **OK**.

A list displays a preview of the pupils in the selected year group with their addresses.

Preview Report Results					
Details Extend Exclude View...					
View: Selected Rows: 159					
Forename	Legal Surname	Year	Reg	AddressLine	
Laura	Adams	Year 7	7A	20 Poplar Avenue, Bedford, MK41 8BL	
Sabrina	Alsop	Year 7	7B	12 Walton Road, Milton Keynes Village, Milton Keynes, MK10 9AG	
Tarak	Annar	Year 7	7C	3 Andrews Close, Maulden, Bedford, MK45 2EE	
Maya	Andrews	Year 7	7D	The Lodge Duckmill Lane, Bedford, MK42 0AY	
Wyatt	Andrews	Year 7	7E	10 Hurley Croft, Monkston, Milton Keynes, MK10 9EP	
Finlay	Aston	Year 7	7F	38 St Johns Street, Bedford, MK42 0DL	
Gwenneth	Astwick	Year 7	7F	233 The Rowans, Milton, Cambridge, CB24 6ZA	
Skyla	Avolon	Year 7	7E	10 Folly Farm, Cranfield, Bedford, MK43 0DL	
Steve	Bond	Year 7	7D	8 Burford Avenue, Northampton, NN3 6AF	
Ellis	Broden	Year 7	7C	2 School Cottages Church Lane, Yelden, Bedford, MK44 1AU	
Fletcher	Brompton	Year 7	7B	17 Hare Lane, Cranfield, MK43 0DT	
Samuel	Cadilia	Year 7	7A	20 Crawley Road, Cranfield, Bedford, MK43 0AB	
Zara	Cameron	Year 7	7A	20 Market Place, Ely, CB7 4NT	
Zach	Carlsen	Year 7	7B	13 Merchant Lane, Cranfield, Bedford, MK43 0DA	
Hannah	Carter	Year 7	7C	1 Flat Adam & Eve Court Adam & Eve Street, Cambridge, CB1 1DX	
Martin	Churchill	Year 7	7D	10 Dane Drive, Cambridge, CB3 9LP	
Emily	Coldman	Year 7	7E	5 St Johns Street, Bedford, MK42 0AH	
Hary	Cookson	Year 7	7F	Pusey House St Giles, Oxford, OX1 3LZ	
Edward	Cooper	Year 7	7F	Emmanuel Village School Lane, Carlton, Bedford, MK43 7LQ	

13. Pupils who are not going on the trip need to be removed. To do this, click the pupil's name and click **Exclude**.

More than one pupil can be excluded at once by highlighting a number at a time. To do this, keep the **Ctrl** key pressed to select the pupils. If you wish to remove a block of pupils, click the top pupil of the block, hold the **Shift** key down and select the bottom pupil; the ones in between should now be highlighted. The pupils highlighted will be excluded from the trip when you click **Exclude**. Make a mental note of some of the names and exclude the first ten pupils.

14. To view those you have excluded select **Excluded** from the **View** drop-down list.

Preview Report Results					
Details Extend Exclude View...					
View: Excluded Rows: 153					
Forename	Legal Surname	Year	Reg	AddressLine	
Sabrina	Alsop			12 Walton Road, Milton Keynes Village, Milton Keynes, MK10 9AG	
Tarak	Annar			3 Andrews Close, Maulden, Bedford, MK45 2EE	
Wyatt	Andrews			10 Hurley Croft, Monkston, Milton Keynes, MK10 9EP	
Finlay	Aston	Year 7	7F	38 St Johns Street, Bedford, MK42 0DL	
Steve	Bond	Year 7	7D	8 Burford Avenue, Northampton, NN3 6AF	
Ellis	Broden	Year 7	7C	2 School Cottages Church Lane, Yelden, Bedford, MK44 1AU	
Samuel	Cadilia	Year 7	7A	20 Crawley Road, Cranfield, Bedford, MK43 0AB	
Zach	Carlsen	Year 7	7B	13 Merchant Lane, Cranfield, Bedford, MK43 0DA	
Hannah	Carter	Year 7	7C	1 Flat Adam & Eve Court Adam & Eve Street, Cambridge, CB1 1DX	
Martin	Churchill	Year 7	7D	10 Dane Drive, Cambridge, CB3 9LP	
Emily	Coldman	Year 7	7E	5 St Johns Street, Bedford, MK42 0AH	
Hary	Cookson	Year 7	7F	Pusey House St Giles, Oxford, OX1 3LZ	
Edward	Cooper	Year 7	7F	Emmanuel Village School Lane, Carlton, Bedford, MK43 7LQ	

The last pupil on the list of excluded pupils has been taken off by mistake, highlight them and click **Include**.

Preview Report Results					
Details		Extend	Include	View...	View: Excluded Rows: 6
Forename	Legal Surname	Year	Reg	AddressLine	
R Laura	Adams	Year 7	7A	20 Poplar Avenue, Bedford, MK41 8BL	
R Maya	Andrews	Year 7	7D	The Lodge Duckmill Lane, Bedford, MK42 0AY	
R Gwenneth	Astwick	Year 7	7F	233 The Rowans, Milton, Cambridge, CB24 6ZA	
R Skyla	Avolon	Year 7	7E	10 Folly Farm, Cranfield, Bedford, MK43 0DL	
R Fletcher	Brompton	Year 7	7B	17 Hare Lane, Cranfield, MK43 0DT	
R Zara	Cameron	Year 7	7A	20 Market Place, Ely, CB7 4NT	

15. Select **All** from the **View** drop-down list. You will now see all the pupils who are in the year group originally selected. Some pupils will have an **R** next to their name which shows they have been removed from the list.

Preview Report Results					
Details		Extend	Toggle	View...	View: All Rows: 159
Forename	Legal Surname	Year	Reg	AddressLine	
R Laura	Adams	Year 7	7A	20 Poplar Avenue, Bedford, MK41 8BL	
Sabrina	Alsop	Year 7	7B	12 Walton Road, Milton Keynes Village, Milton Keynes, MK10 9AG	
Tarak	Amnar	Year 7	7C	3 Andrews Close, Maulden, Bedford, MK45 2EE	
R Maya	Andrews	Year 7	7D	The Lodge Duckmill Lane, Bedford, MK42 0AY	
Wyatt	Andrews	Year 7	7E	10 Hurley Croft, Monkston, Milton Keynes, MK10 9EP	
Finlay	Aston	Year 7	7F	38 St Johns Street, Bedford, MK42 0DL	
R Gwenneth	Astwick	Year 7	7F	233 The Rowans, Milton, Cambridge, CB24 6ZA	
R Skyla	Avolon	Year 7	7E	10 Folly Farm, Cranfield, Bedford, MK43 0DL	
Steve	Bond	Year 7	7D	8 Burford Avenue, Northampton, NN3 6AF	
Elis	Broden	Year 7	7C	2 School Cottages Church Lane, Yelden, Bedford, MK44 1AU	
R Fletcher	Brompton	Year 7	7B	17 Hare Lane, Cranfield, MK43 0DT	
Samuel	Cadilla	Year 7	7A	20 Crawley Road, Cranfield, Bedford, MK43 0AB	
Zara	Cameron	Year 7	7A	20 Market Place, Ely, CB7 4NT	

16. To add in pupils from a different year group, click **Extend**.
17. Note that the **View** is back to **Selected**.

Preview Report Results					
Details		Extend	Exclude	View...	View: Selected Rows: 159
Forename	Legal Surname	Year	Reg	AddressLine	
Laura	Adams	Year 7	7A	20 Poplar Avenue, Bedford, MK41 8BL	
Sabrina	Alsop	Year 7	7B	12 Walton Road, Milton Keynes Village, Milton Keynes, MK10 9AG	
Tarak	Amnar	Year 7	7C	3 Andrews Close, Maulden, Bedford, MK45 2EE	
Maya	Andrews	Year 7	7D	The Lodge Duckmill Lane, Bedford, MK42 0AY	
Wyatt	Andrews	Year 7	7E	10 Hurley Croft, Monkston, Milton Keynes, MK10 9EP	
Finlay	Aston	Year 7	7F	38 St Johns Street, Bedford, MK42 0DL	
Gwenneth	Astwick	Year 7	7F	233 The Rowans, Milton, Cambridge, CB24 6ZA	
Skyla	Avolon	Year 7	7E	10 Folly Farm, Cranfield, Bedford, MK43 0DL	
Steve	Bond	Year 7	7D	8 Burford Avenue, Northampton, NN3 6AF	
Elis	Broden	Year 7	7C	2 School Cottages Church Lane, Yelden, Bedford, MK44 1AU	
Fletcher	Brompton	Year 7	7B	17 Hare Lane, Cranfield, MK43 0DT	
Samuel	Cadilla	Year 7	7A	20 Crawley Road, Cranfield, Bedford, MK43 0AB	
Zara	Cameron	Year 7	7A	20 Market Place, Ely, CB7 4NT	
Zach	Carlsen	Year 7	7B	13 Merchant Lane, Cranfield, Bedford, MK43 0DA	
Hannah	Carter	Year 7	7C	1 Flat Adam & Eve Court Adam & Eve Street, Cambridge, CB1 1DX	
Martin	Churchill	Year 7	7D	10 Dane Drive, Cambridge, CB3 9LP	
Emily	Coldman	Year 7	7E	5 St Johns Street, Bedford, MK42 0AH	
Harry	Cookson	Year 7	7F	Pusey House St Giles, Oxford, OX1 3LZ	
Edward	Cooper	Year 7	7F	Emmaus Village School Lane, Carlton, Bedford, MK43 7LQ	
Robin	Coppler	Year 7	7E	10 Rays Close, Bedford, MK42 0BE	
Isabella	Cosenza	Year 7	7D	14 Hawthorne Avenue, Bedford, MK40 4HJ	
Caleb	Coulson	Year 7	7C	11 The Buntings, Bedford, MK41 7LA	
Francesca	Dakota	Year 7	7B	4 Swan Road, Wixams, Bedford, MK42 6BW	
Lorenzo	Defeo	Year 7	7A	3 Augusta Drive, Macclesfield, SK10 2UR	
Tommy	Dennis	Year 7	7A	23 Peckover Close, Peterborough, PE2 8UQ	
Harley	Dicristo	Year 7	7B	31 Ditmas Avenue, Kempston, Bedford, MK42 7DR	
Stephanie	Dixon	Year 7	7C	18 Pingle Lane, Northborough, Peterborough, PE6 9BW	
Susy	Dolittle	Year 7	7D	6 Penwald Close, Crowland, Peterborough, PE6 0AQ	

18. Select **Excluded** from the **View** drop-down list. This list has grown and now includes pupils from all different years. Click the **Year** heading to sort the list in **Year** order.
19. Select three or four pupils from a different year group by using the **Ctrl** or **Shift** key functionality as described above and, when they are highlighted, click **Include**.

NOTE: You could have added pupils from View All but you will find they can only be added one at a time and you have to use Toggle. Using View Excluded is a quicker method.

Preview Report Results

Details Extend Include View... View: Excluded Rows: 803

	Forename	Legal Surname	Year	Reg	AddressLine
X	Chris	Aaron	Year 8	8A	1 Ely Road, Milton, Cambridge, CB24 6DD
X	Jason	Aaron	Year 8	8B	15 Cottesloe Court, Stony Stratford, Milton Keynes, MK11 1NL
X	Liz	Aaron	Year 8	8C	1 Ely Road, Milton, Cambridge, CB24 6DD
X	Sophie	Aaron	Year 8	8D	1 Ely Road, Milton, Cambridge, CB24 6DD
X	Graham	Abbes	Year 11	11A	22 Winchester Circle, Kingston, Milton Keynes, MK10 0BA
X	Sean	Abbey	Year 11	11B	22 Walton Road, Milton Keynes Village, Milton Keynes, MK10 9AG
X	Cameron	Able	Year 13	G	26 Fortescue Drive, Shenley Church End, Milton Keynes, MK5 6AU
X	Robert	Ackrington	Year 13	H	87 Watling Street, Shenley Church End, Milton Keynes, MK5 6AL
X	Stanley	Ackton	Year 12	G	12 High Street, Higham Ferrers, Rushden, NN10 8BL
X	Stephen	Ackton	Year 8	8E	12 High Street, Higham Ferrers, Rushden, NN10 8BL
X	Jordan	Acton	Year 10	10F	22 Gordon Road, Harborne, Birmingham, B17 9HB
X	Samantha	Acton	Year 11	11A	22 Gordon Road, Harborne, Birmingham, B17 9HB
X	Adam	Adams	Year 9	9A	5 Linden Road, Bedford, MK40 2DD

- From the **View** drop-down list click **Selected**.
- Scroll down the list of selected pupils and at the top or bottom you will probably find some pupils who are from a different year group and have a **&** next to their name. This means that they have been added to the list (the names should match with those who are included).

Preview Report Results

Details Extend Exclude View... View: Selected Rows: 157

	Forename	Legal Surname	Year	Reg	AddressLine
&	Jason	Aaron	Year 8	8B	15 Cottesloe Court, Stony Stratford, Milton Keynes, MK11 1NL
&	Graham	Abbes	Year 11	11A	22 Winchester Circle, Kingston, Milton Keynes, MK10 0BA
&	Stanley	Ackton	Year 12	G	12 High Street, Higham Ferrers, Rushden, NN10 8BL
	Sabrina	Alsop	Year 7	7B	12 Walton Road, Milton Keynes Village, Milton Keynes, MK10 9AG
	Tarak	Amnar	Year 7	7C	3 Andrews Close, Maulden, Bedford, MK45 2EE
	Wyatt	Andrews	Year 7	7E	10 Hurley Croft, Monkston, Milton Keynes, MK10 9EP
	Finlay	Aston	Year 7	7F	38 St Johns Street, Bedford, MK42 0DL
	Steve	Bond	Year 7	7D	8 Burford Avenue, Northampton, NN3 6AF
	Ellis	Broden	Year 7	7C	2 School Cottages Church Lane, Yelden, Bedford, MK44 1AU
	Samuel	Cadilia	Year 7	7A	20 Crawley Road, Cranfield, Bedford, MK43 0AB
	Zara	Cameron	Year 7	7A	20 Market Place, Ely, CB7 4NT

- Once you are sure that the list of selected pupils is correct, including pupils from different year groups, click **Run**. Remember, if you wanted the list in true alphabetical order you could click the **Surname** heading.

Word will open and pupils from all the different year groups will be included. This is the report that you would then print or save as required.

- Click **Close** to close Word and then **Close** to close the report.

Scenario – Producing a List of Names Using Exclude, Include, Toggle and View

The head teacher wishes to send letters out to parents of a selection of pupils who have received a number of good work merits. The school has yet to implement the SIMS behaviour system (but will soon). The head teacher has given the administrator a list of the pupils and would like a list of addresses along with the parental addressee and parental salutations for the labels.

Step by Step – Using Exclude, Include, Toggle and View

- Select **Reports | Design Report**.
- Click the **Create a new report** hyperlink to display the **Report Designer** screen.
- Click **Student** and then **Next**.

4. On roll pupils are required, so click **Next** or click the **No Columns Specified** hyperlink.
5. From the list of fields, select **Legal Surname, Legal Forename, Year Group, Reg Group, Parental Salutation, Parental Addressee** and **AddressLine**.
6. Click **Next** on the wizard or click the **Filter Students** hyperlink to display the **Apply Filter** screen.
7. You want to be able to filter out a registration group as a starting point so click **New**. Find the field **Reg Group** and select the **Prompt at Runtime** check box, then click **OK**.
8. Click **Next** three times to move past the **Define Sort Order** screen and the **Specify Effective Date** screen. Select **Word List** from the **Define Presentation** section, click **Save As** and save the report as **Students, Addresses & Parental Sal**. Deselect the **Private** check box and click **OK**.
9. Click **Preview**.
10. Select any **Registration Group**. This is the registration group with the most pupils required in it. If there is not one registration group then select an arbitrary one.

A list displays a preview of the pupils in the selected registration group with their addresses, parental salutation and parental addressees.

11. Remove the majority of pupils, as they have not received good work merits by highlighting the pupil name, and click **Exclude**. As described in the step by step above more than one pupil can be excluded at once by using the **Ctrl** or **Shift** key functionality. Exclude most of the pupils and leave three.
12. Change the **View** from **Selected** to **Excluded** The last pupil on the list of excluded pupils has been taken off by mistake, so highlight them and click **Include**.
13. Click **Extend**.
14. Select **Excluded** from **View**. The list has now grown and includes pupils from all different registration groups and years. Click the **Year** heading. Pupils will now be shown in **Year** order.
15. Select a few pupils and click **Include**.
16. Select **All** from **View**. Try to select a few pupils and add them to the report. Notice that this is not possible. Instead pupils need to be selected one at a time and can be added by clicking **Toggle**.
17. Select **Selected** from **View**.
18. Once you are sure that the list of selected pupils is correct, with pupils from different year groups, click **Run**. Remember, if you want the list in true alphabetical order, click the **Legal Surname** heading.

Word will open and will contain the selected pupils. This is the report that you would then print or save as required.

19. Click **Close** and then **Close** in SIMS to close the wizard.

06

Creating Word Mail Merge Letters

This chapter contains:

Chapter Introduction	69
Scenario – Creating a Mail Merge Letter	69
Step by Step – Creating a Mail Merge Letter	69
Scenario – Request to Save a Letter to the Students Linked Documentation.....	74
Step by Step – Saving to the Document Server.....	74
Activity – Letter to Check Ethnicity and Religion	77

Chapter Introduction

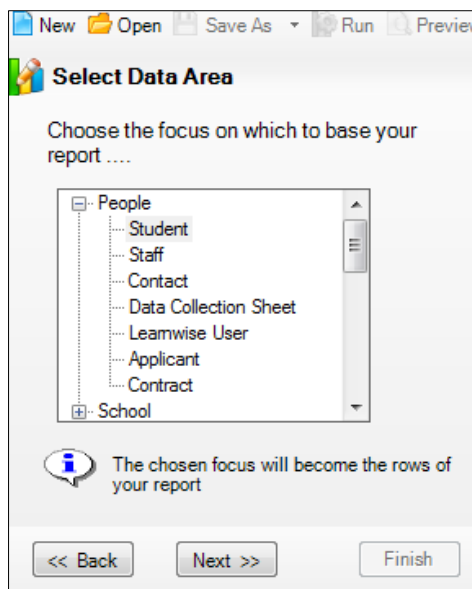
The fields from SIMS can be run as a Word mail merge to produce letters, labels and other forms.

Scenario – Creating a Mail Merge Letter

The school wants to send a letter home to the parents of pupils who have been listed in SIMS as **More Able**.

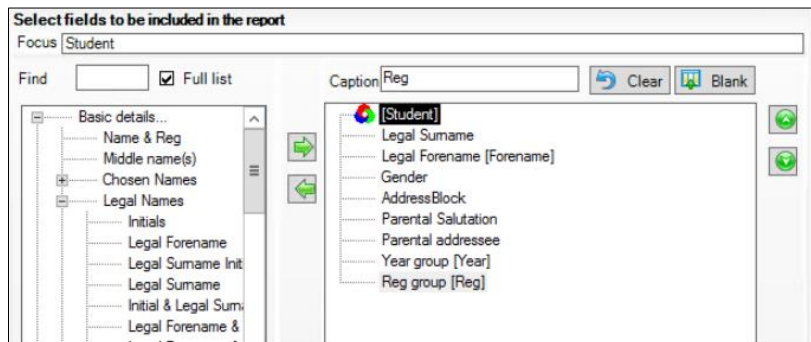
Step by Step – Creating a Mail Merge Letter

1. Select **Reports | Design Report** to display the **Report Designer** screen. Click the **Create a new report** hyperlink to display the **Select Data Area** screen.

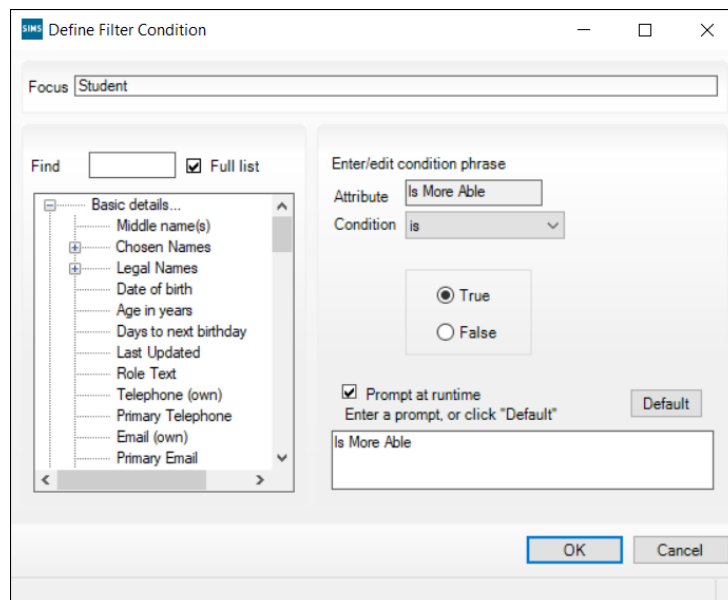


2. Select **Student** as the data area and click **Next**.
3. The report is for on roll pupils. Click **Next**.

- From the **Select Data Fields** screen, select the **Legal Surname, Legal Forename, Gender, Address Block, Parental Salutation, Parental Addressee, Year Group** and **Reg Group** fields. Click **Next**.

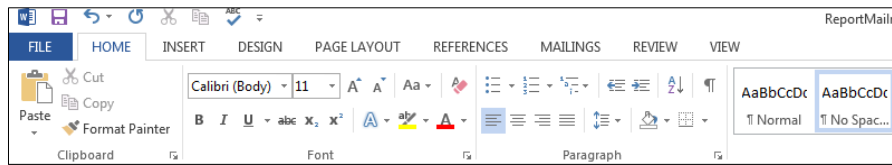


- In the **Define Filter** section of the **Apply Filter** screen, click **New** to display the **Define Filter Condition** dialog.
- Find the **Is More Able** field, ensure the **Condition** is set to **Is** and select the **True** radio button. Select the **Prompt at runtime** check box and click **OK**.

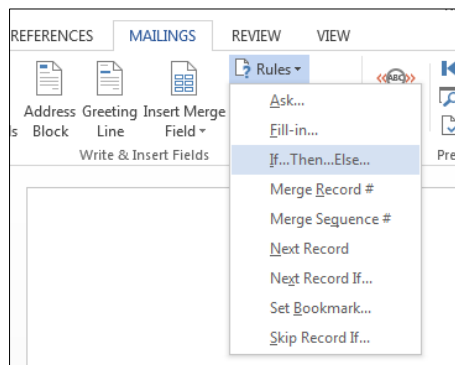


- Click **Next**.
- Leave the sort order as the default and click **Next**.
- The effective date is to be today so click **Next**.
- Select **Word Mailmerge** from the **Define** presentation screen and click **New** under **Word Mailmerge Settings** to create a new mail merge document.
- Check that the **Enter parameter values for report dialog** is correct and click **OK**.
- In Word locate **Insert Merge Field** on the **Mailings** tab.
- Click the dropdown next to **Insert Merge Field** and notice that the fields are the ones that were added in stage 4. Click anywhere in the Word document to close the **Insert Merge Field** drop-down list.

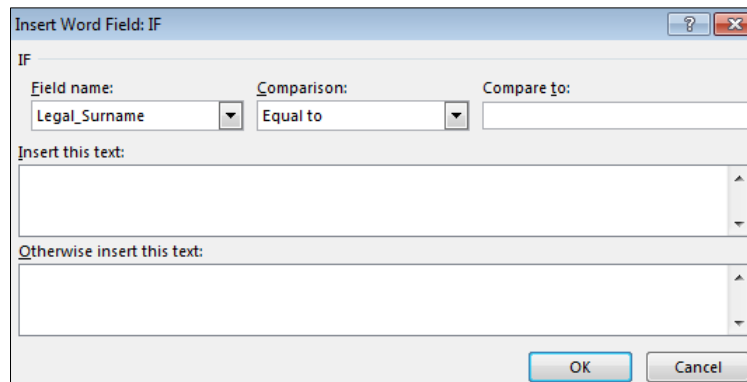
NOTE: To remove the default double line spacing in Word click the Home tab and select No Spacing from the Styles section of the ribbon. Click back on the Mailings tab once this has been applied.



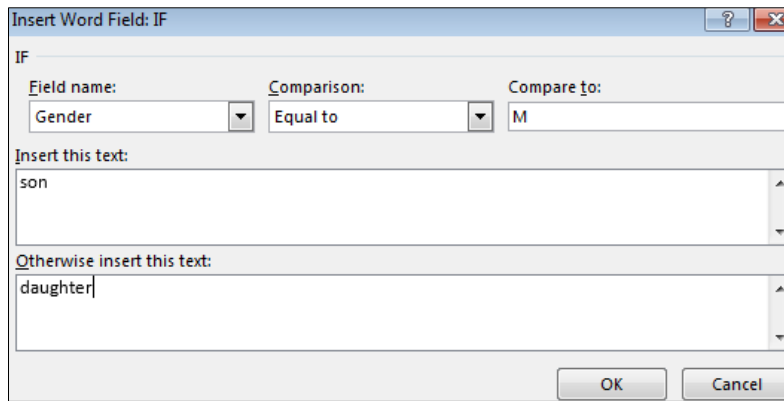
14. From **Insert Merge Field** select **Parental Addressee**, press **Return** and select **AddressBlock**. Press **Enter** twice.
15. Enter **Dear**, press the **Space Bar**, and then select **Parental Salutation** from **Insert Merge Field**.
16. Press **Enter** twice, and then select **Forename** from **Insert Merge Field**, press the **Space Bar** and select **Legal Surname** from the **Insert Merge Field** drop-down list.
17. Press the **Space Bar** and select **Year** from the **Insert Merge Field** drop-down list, press the **Space Bar** and select **Reg** from the **Insert Merge Field** drop-down list.
18. Press the **Enter** key twice and type **I am delighted to inform you that your (insert merge field - gender) has been selected by (insert merge field-gender) teachers for inclusion on the Hay Festival of Literature and Arts trip which will take place this year. Further details will be forwarded in due course.**
19. Press the **Enter** key twice and type **Yours sincerely**. Press the **Enter** key twice and type **Mrs Abell**.
20. To enable **daughter/son** or **him/her** to be displayed correctly, highlight **<<Gender>>** then, select **Rules** on the **Mailings** tab and **If...Then...Else** from the drop-down list as the rule.



The following graphic is displayed:

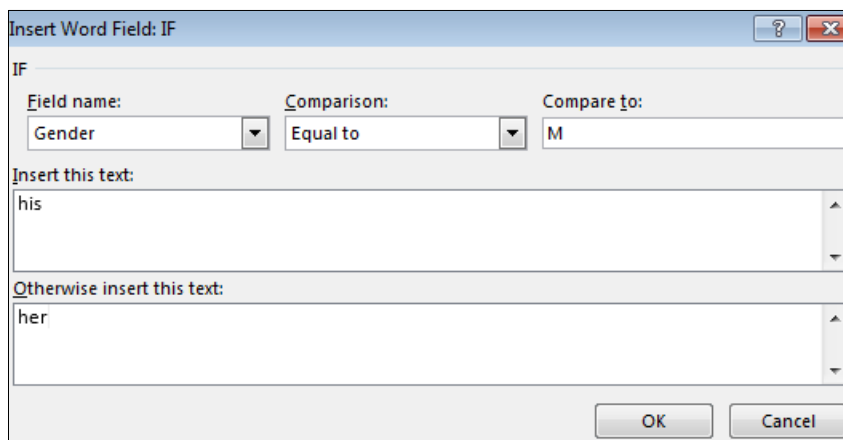


21. In the **Field name**, select **Gender** from the drop-down list and observe what should be used in place of M (male) and F (female).



NOTE: The Compare to box is case sensitive so the M and F should be upper case.

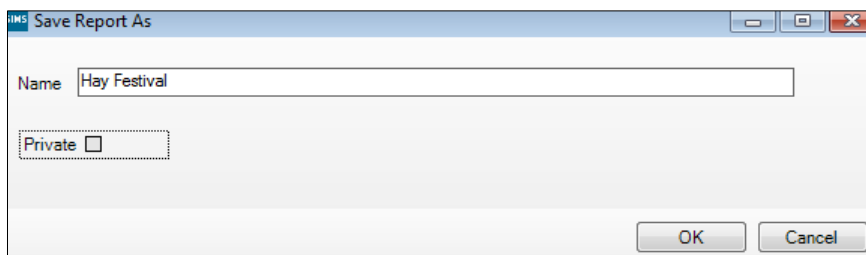
22. Use the same rule for **his/her** further down the letter.



23. Select **File | Save** and click **Close**.

24. Click **Save As** in SIMS and name the report **Hay Festival**.

25. Deselect the **Private** check box and click **OK**.

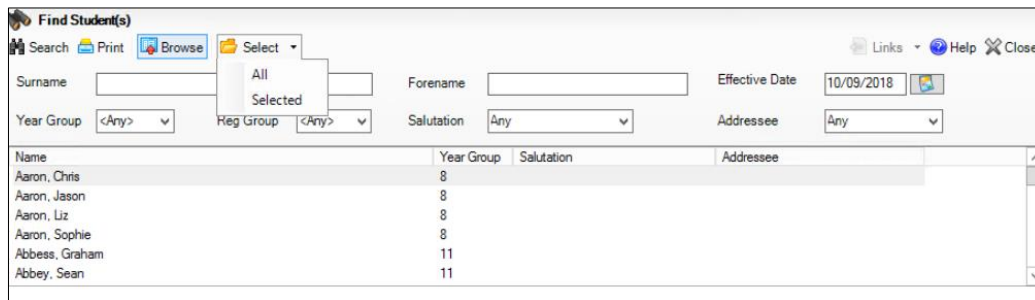
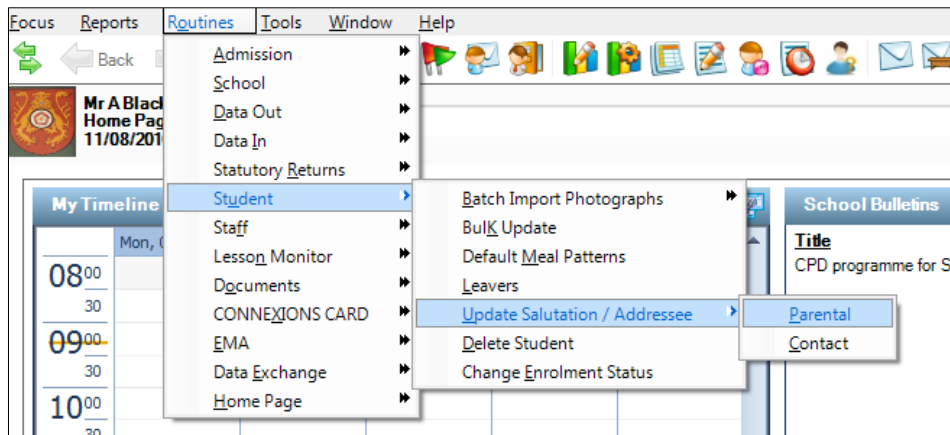


26. Click **Run**.

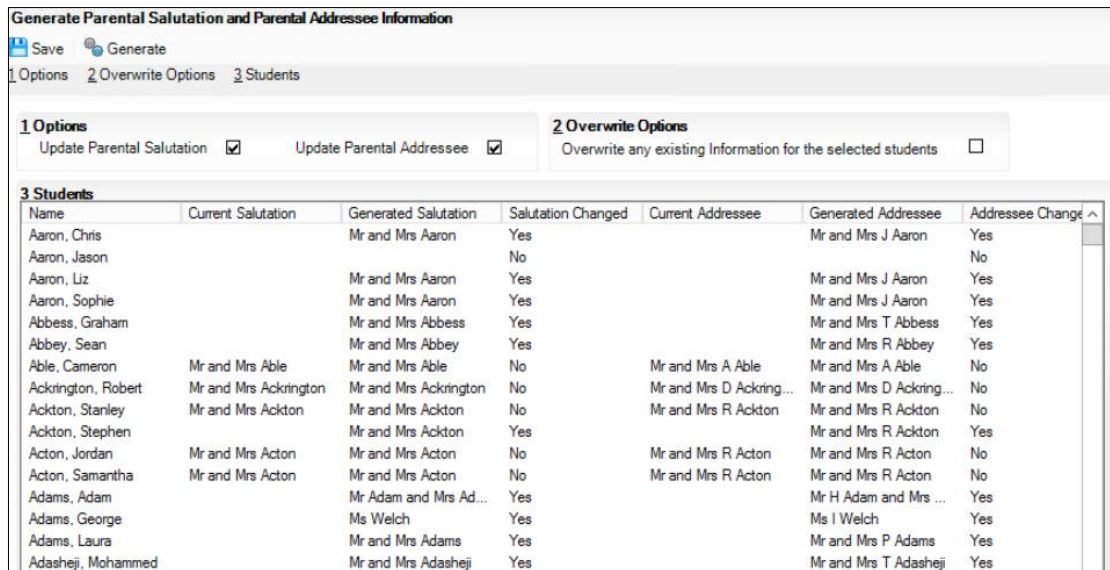
27. Word will now open and a letter for each child will be produced. You may find that some pupils do not have a **Parental Addressee/Salutation** field. This will be examined in a moment.

28. Having looked at the letters, make a note of the name of one of the pupils as this will be used in a future exercise. Click **Close** to close Word without saving. You may need to close Word a second time to close the merge file. Remember that you normally would not need to save Word files when running a report as the information can be out of date as soon as it is produced.

29. Select **Routines | Student | Update Parental Salutation/Addressee | Parental**, click **Search** and all pupils will be found. Select **All** from the **Select** drop-down list.



30. Select the **Update Parental Salutation** and **Update Parental Addressee** check boxes and click **Generate**.



31. Click **Save** and then **Close** to return to the report.
32. Click **Run** and then **OK** to see the report again.

Notice that the **Parental Addressee** and **Parental Salutation** section of the letter is now filled in. If you find that salutation for individual pupils has not been completed then this may mean that no contacts have been allocated with parental responsibility, or that the parents do not (according to SIMS) live with the pupil. In the pupil's record, you might want to check that the parents have a **House** icon next to the priority, showing that they live with the child.

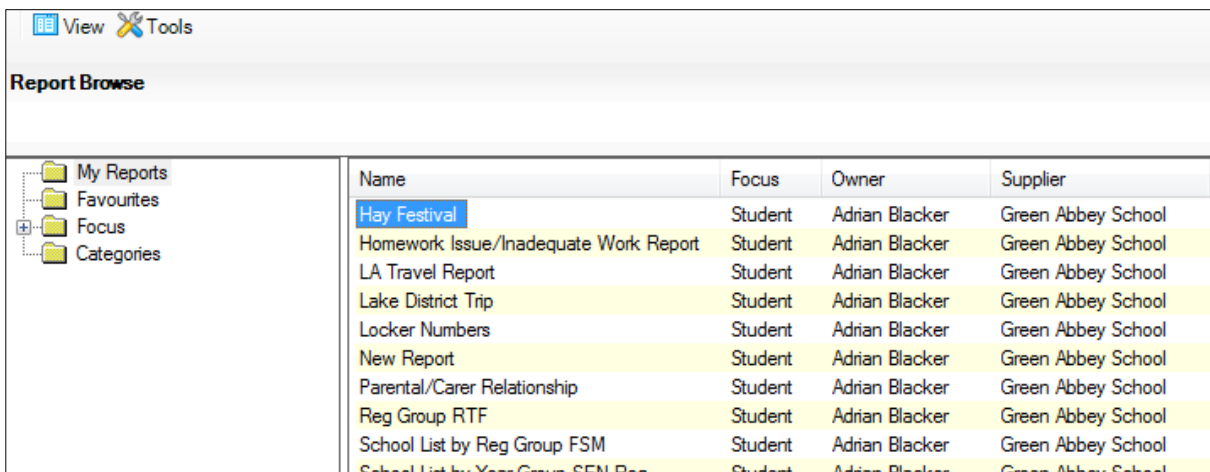
33. Having looked at the letters click **Close** without saving. You may need to close Word a second time to close the merge file, and click **Close** in SIMS to close the wizard.

Scenario – Request to Save a Letter to the Students Linked Documentation

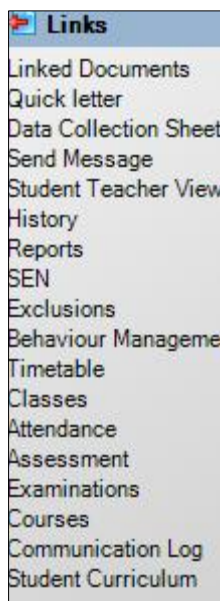
Often a school wishes to keep track of letters that have been sent out, in case parents query these letters in the future. SIMS has an inbuilt document management system (or filing cabinet) which can store outputs from reports so that they can be recalled later.

Step by Step – Saving to the Document Server

1. Open the pupil record for one of the pupils for whom a Hay Festival letter was produced.
2. In the **Links** panel, click the **Reports** link.
3. From the **Select Report for Student** dialog, click the **+** next to the **Focus** folder.
4. Click the **Student** folder.

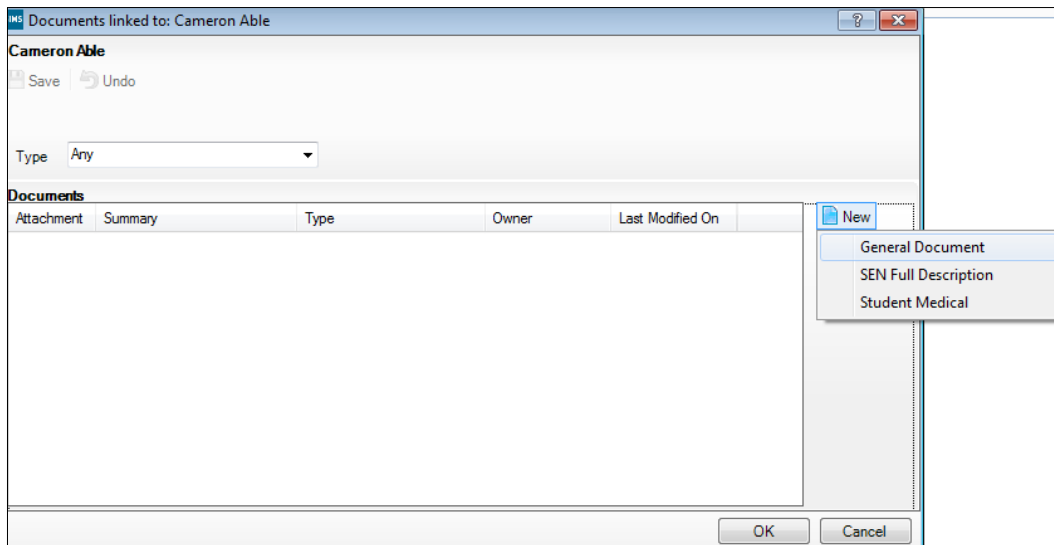


5. Find the **Hay Festival** report and run it by double clicking it.
6. Save the Word output to the computer desktop (or somewhere where it can be found) with the name **Hayletter.doc**.
7. Click **Close** to close Word.



8. In the **Links** panel, click the **Linked Documents** hyperlink.

A **Document Linked to:** dialog is displayed.



9. Select **General Document** by clicking **New**.
10. Type **Letter to Parent** (a summary must be provided) in the **Summary** field of the **Add Note/Document** dialog.
11. The document can be classed as **Public**, **Private** or **Confidential**. Leave this one as **Public**.

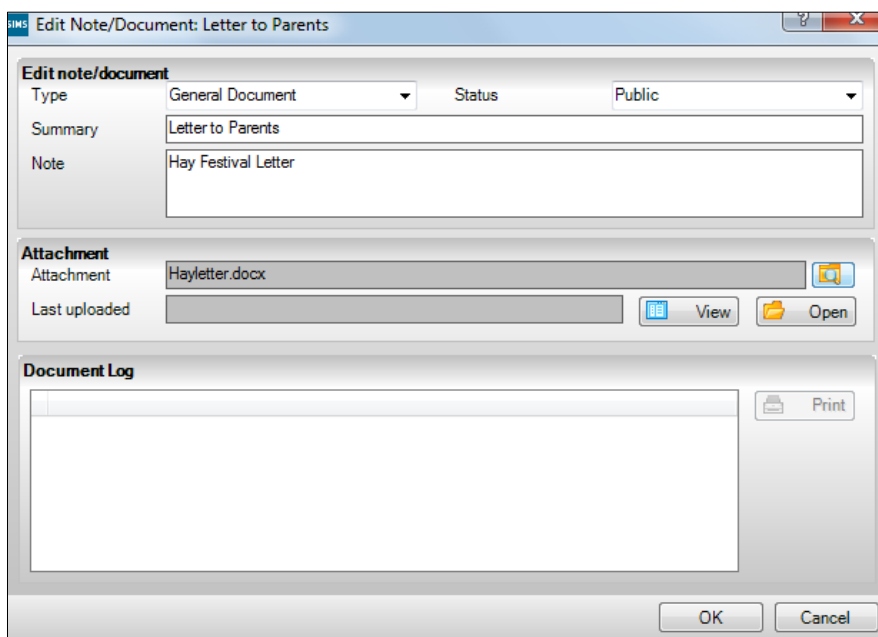
NOTE: Public - Documents with this status are available to all staff members with sufficient add/view/edit permissions.

Private - Documents with this status are only available to the staff member who attaches them.

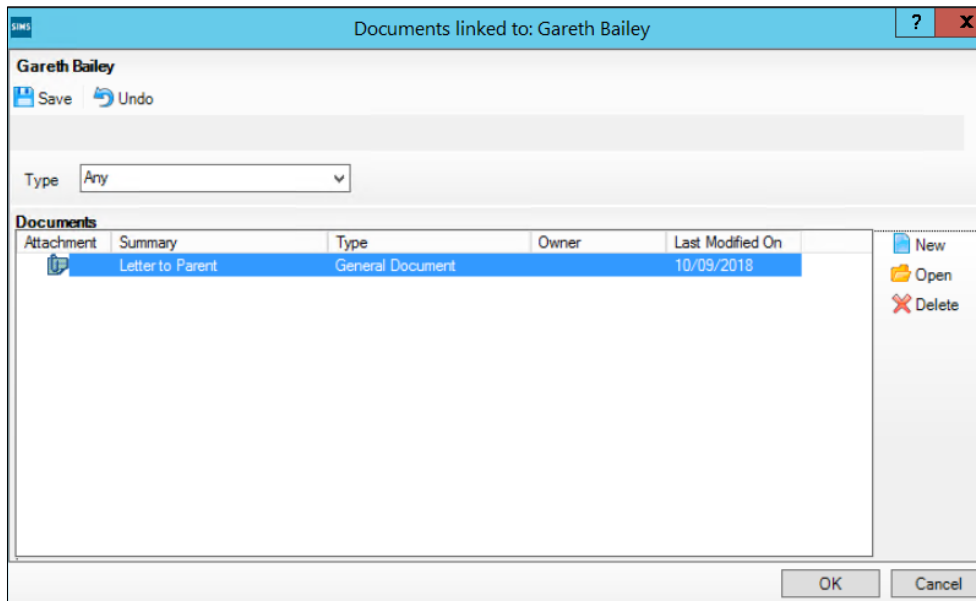
The system administrator can delete private documents linked to a staff member who no longer works at the school by using the Maintain Orphaned Documents routine.

Confidential - Documents with this status are only available to school administrators, SEN coordinators and the senior management team.

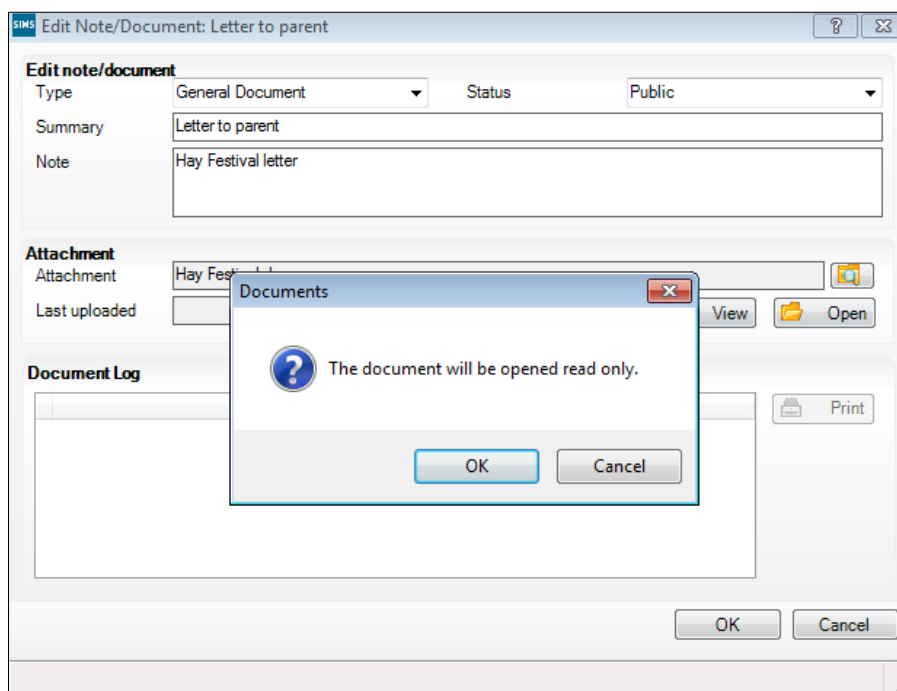
12. Type **Hay Festival Letter** in the **Note** field.



13. Click **field browser** (magnifying glass) on the **Attachment** line.
14. Navigate to the **Hayletter.doc** Word file and click **Open**; the filename will now show in the **Attachment** line.
15. Click **OK**.



16. You are now in the **Documents Linked** area; click **Save**. This will upload a copy of the document into the SIMS document server, which will remain even if the Word document is deleted from the original location. In this way information can be copied from pen drives or temporary drives.
17. To view the document, double-click the **Letter to Parent** summary.
18. Click **View** and a message will be displayed to say the document will be opened as read-only. Click **OK** to view the document.



19. Having viewed the letter, click **Close** to close Word.

20. The document is now complete. Click **Cancel** twice and close the pupil's record by clicking **Close**.

Activity – Letter to Check Ethnicity and Religion

The school has decided to ask parents to check the ethnicity and religion recorded for the pupils. Create a brief letter asking parents to check the ethnicity and religion that is in SIMS. The content of the letter could be as follows:

We are updating our pupil records. Please check the Ethnicity and Religious information that we hold about your child below, make any necessary changes and then send the sheet back to school.

07

Creating Labels with Mail Merge

This chapter contains:

Chapter Introduction	79
Scenario – Address Label Request	79
Step by Step – Mail Merge Labels	79
Activity – Special Needs Students Address labels	83

Chapter Introduction

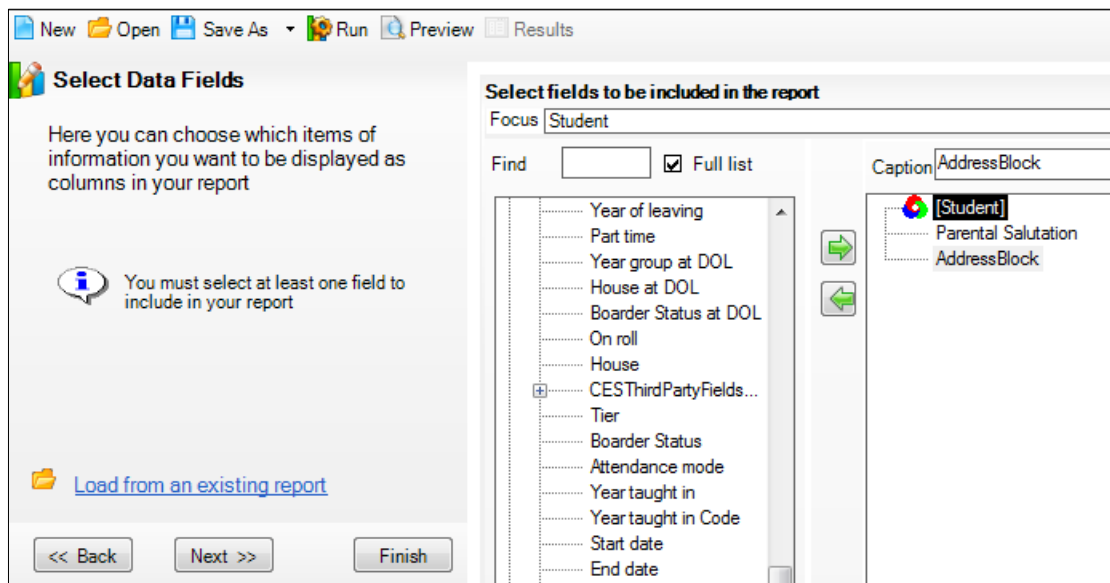
You can use mail merge to produce labels in the same way as you can produce mail merge letters as outlined in the previous chapter. The labels could be for envelopes, folders or exam desks for example.

Scenario – Address Label Request

The business manager has requested address labels to be set up so that a registration group can be selected when running the report.

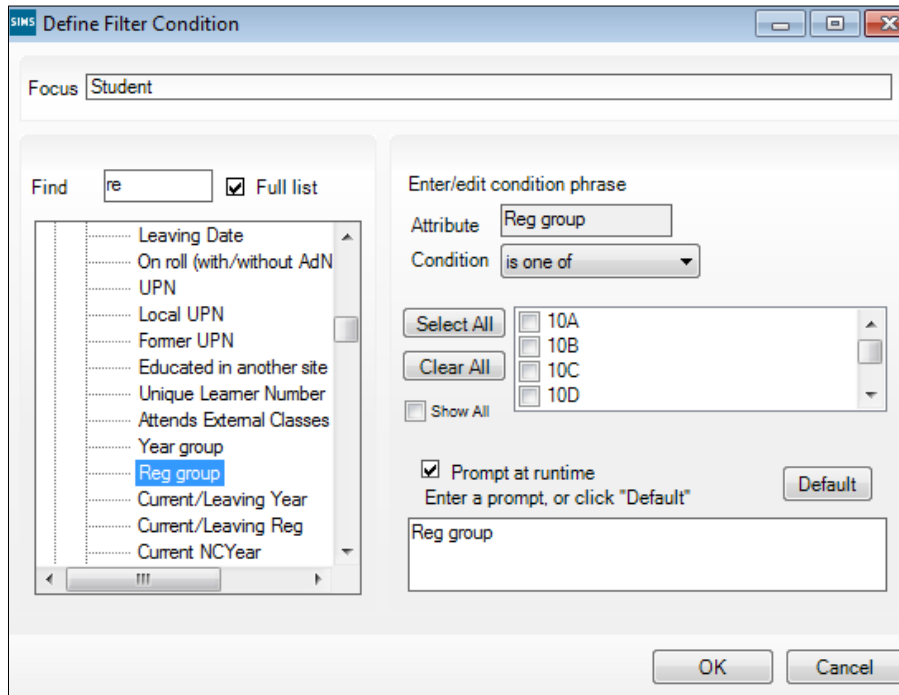
Step by Step – Mail Merge Labels

1. Select **Reports | Design Report** or click the **Design Reports** icon.
2. Click the **Create a new report** hyperlink.
3. Select **Student** in the **Select Data Area** screen and click **Next** on the wizard.
4. The report needs to be based on roll pupils so click **Next** on the wizard.
5. Select the **Parental Addressee** and **AddressBlock** fields.

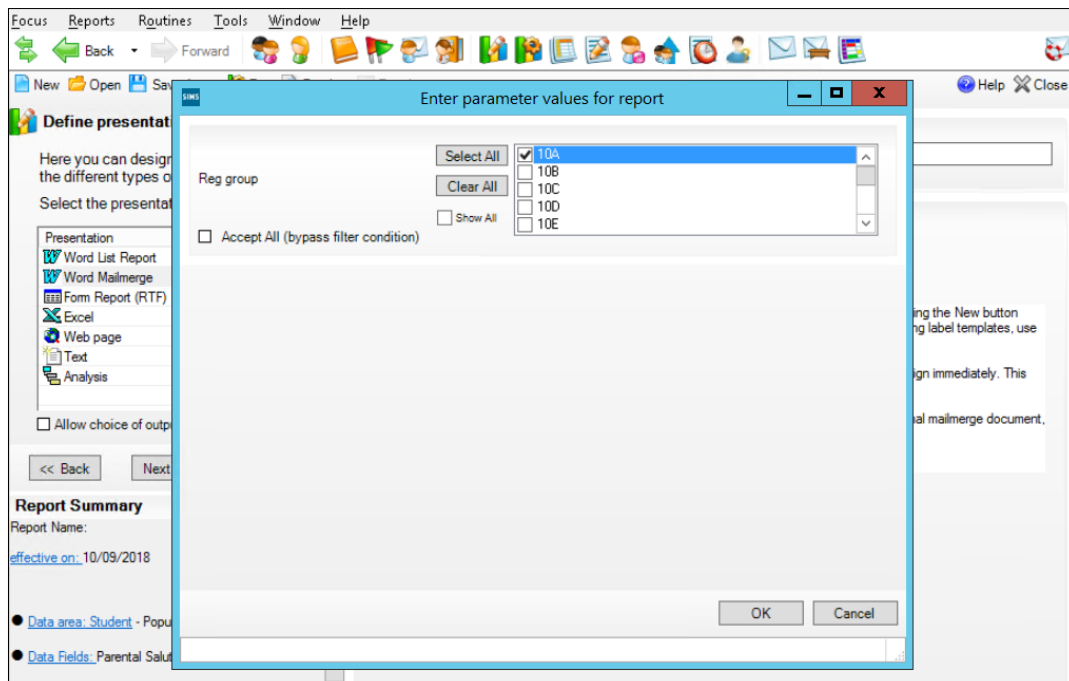


6. Click **Next** on the wizard.

- In the **Define Filter** section of the **Apply Filter** screen, click **New**, select **Reg Group** as the **Attribute** and **is one of** as the **Condition**, and then select the **Prompt at runtime** check box. Click **OK**.

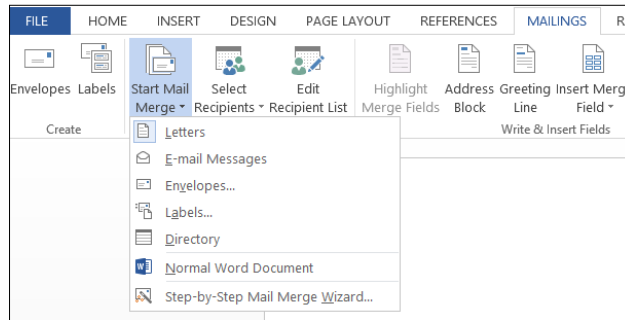


- Click **Next** on the wizard. The default sort order is satisfactory for this example.
- Click **Next** twice on the wizard to display the **Define Presentation** screen.
- Click **Word Mailmerge**, then in the **Word Mailmerge Settings** panel click **New**.

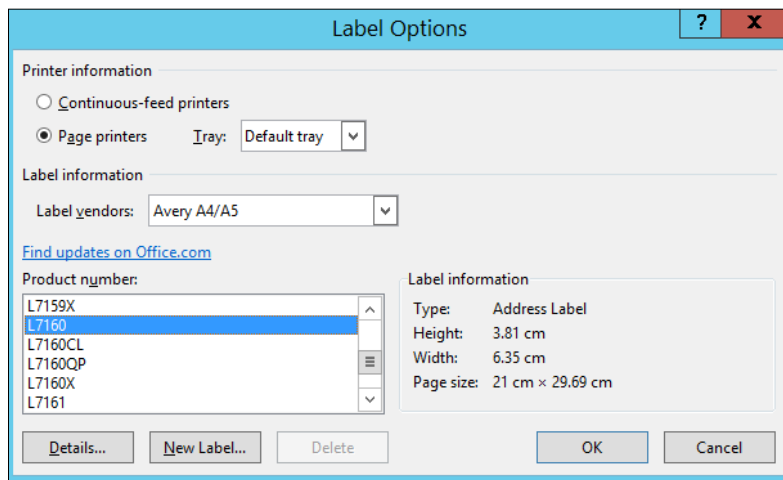


- Select a registration group, for example 10A or 3TO and click **OK**. This gives Word some data. Word will now open and the **Mail Merge** fields can be set up.

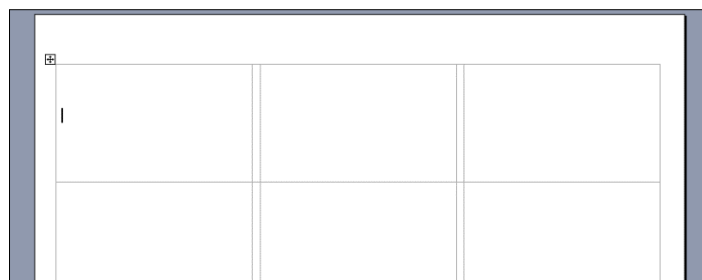
- Word will open on the **Mailings** tab, select **Labels...** from the **Start Mail Merge** drop-down list to display a side task bar.



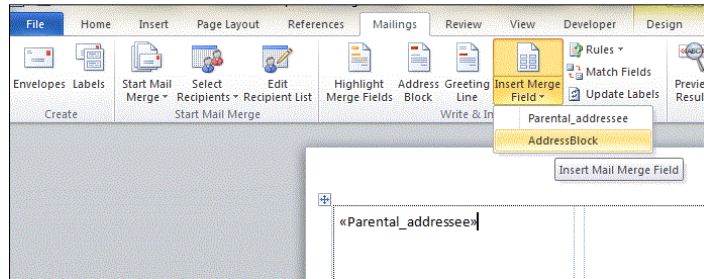
- The **Label Options** dialog box will be displayed.



- Change **Label vendors** to **Avery A4/A5**.
- The product numbers shown are now the **Avery label codes for A4 or A5 sheets**. Select **Product Number L7160** and click **OK** to display a table on the Word page.



- Click in the first label on the sheet then the **Insert Merge Fields** drop-down list. The fields that were selected in SIMS are now displayed in a list.
- Click **Parental_addressee**.
- Press **Enter** after **<<Parental_addressee>>**.
- Select **AddressBlock** from the **Insert Merge Fields** drop-down list.



20. One label is now set up, click **Update all labels** which is in the **Mail Merge** task bar.

«Parental_addressee» «AddressBlock»	«Next Record»«Parental_addressee» «AddressBlock»	«Next Record»«Parental_addressee» «AddressBlock»
«Next Record»«Parental_addressee» «AddressBlock»	«Next Record»«Parental_addressee» «AddressBlock»	«Next Record»«Parental_addressee» «AddressBlock»
«Next Record»«Parental_addressee» «AddressBlock»	«Next Record»«Parental_addressee» «AddressBlock»	«Next Record»«Parental_addressee» «AddressBlock»

21. Click **Next** on the **Mail Merge** task bar and you will now see a preview of the labels. **Previous** and **Next** on the wizard can be used to display the labels, as required.

Mr and Mrs F Abbot 16 Brickberry Close Hampton Hargate Peterborough PE7 8AR	Mr and Mrs R Ackton 12 High Street Higham Ferrers Rushden NN10 8BL	Mr M Boman Faldo Farm Faldo Road Barton-Le-Clay Bedford MK45 4RF
Mr and Mrs J Candy 2 Willows Mill Farm Courtyard Beachampton Milton Keynes MK19 6DS	Mr and Mrs J Candy 2 Willows Mill Farm Courtyard Beachampton Milton Keynes MK19 6DS	Mrs S Dahl Flat 73 Brookmeadow Court 52 Paradise Lane Birmingham B28 0EH
Mr and Mrs G Davies 11 Abbeys Grove Birmingham B25 8YB	Mrs S Etten 6 Harlestone Court Giffard Park Milton Keynes MK14 5PD	Mr and Mrs A Gasman 24 Diddington Close Bletchley Milton Keynes MK2 3EB

- a) In Word 2010 onwards select **File | Save**, then **File | Exit**.
- b) In Word 2007 select **Office Button | Save**, and then select **Office Button | Exit Word**.

You will be returned to the SIMS reporting screen.

- 22. The merge document is now attached to the report, so save the report. Click **Save As** and name the report **Parents' Labels**. Deselect the **Private** check box and click **OK**.
- 23. Click **Run** and then **OK** to run the report and select a different registration group.

Mrs K ADAMS 28 Water Lane Wootton Northampton NN4 6HE	Dr D Banner 41 Engaine Drive Shenley Church End Milton Keynes MK5 6BA	Mrs D BATCHELOR 1 Bevan Place Cardiff CF14 3UX
Mrs C BROAD 19 Engaine Drive Shenley Church End Milton Keynes MK5 6BA	11 Engaine Drive Shenley Church End Milton Keynes MK5 6BA	Mr and Mrs P CARR 17 Engaine Drive Shenley Church End Milton Keynes MK5 6BA
Mr D CLARKE 34 Cunningham Way Eaton Socon	Mr and Mrs S G CLOUTER 23 Millbrook Road	Mr and Mrs N DAY 4 Millbrook Road

24. Click **Close**.

Activity – Special Needs Students Address labels

The school needs to send out letters to all the parents of pupils who are on the Special Needs Register. Use the Parental Addressee and AddressBlock fields to create the labels.

08

Excel Outputs

This chapter contains:

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Scenario – Request for Excel List.....	84
Step by Step – Output to Excel.....	84
Activity – Request for Special Needs Register	88

Chapter Introduction

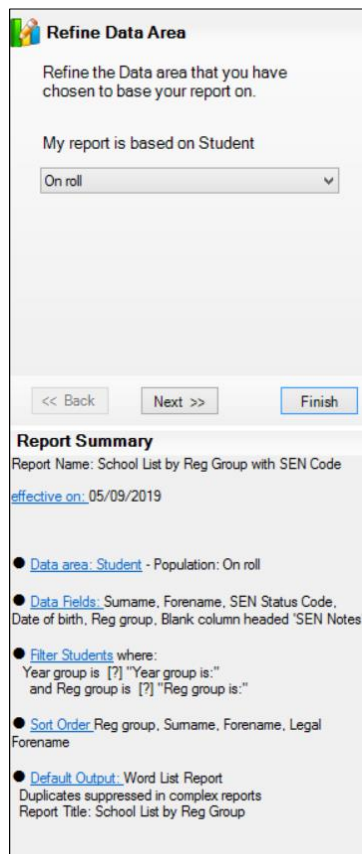
SIMS reports can be output to Excel as well as to Word.

Scenario – Request for Excel List

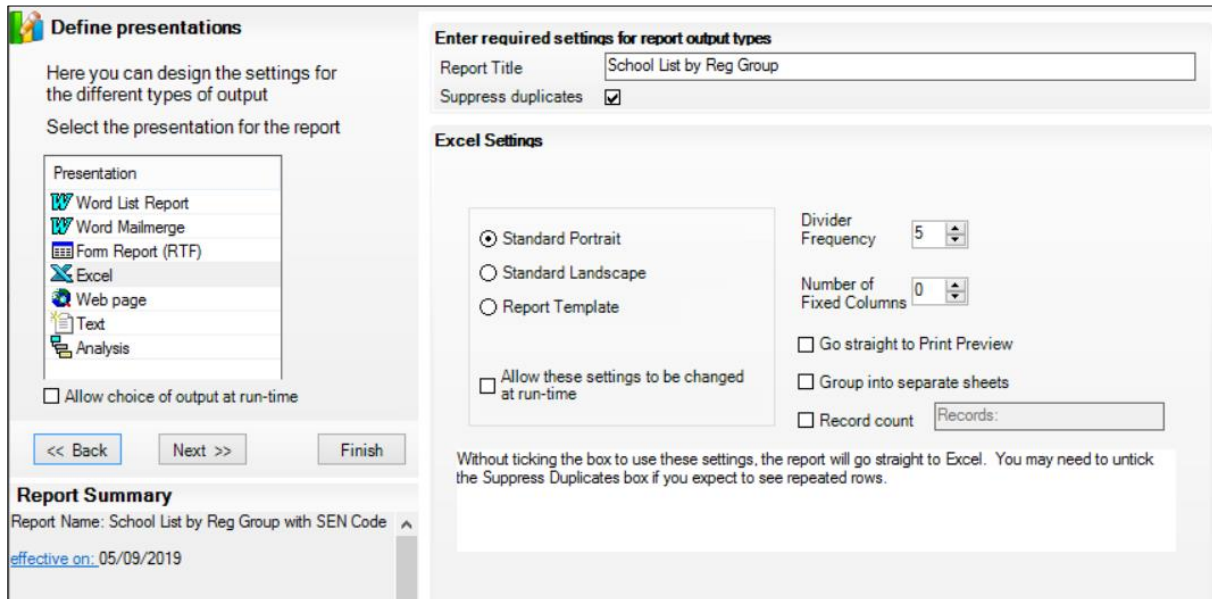
The SENDco would like the **School List by Reg Group with SEN Code** report created earlier to be run for a year group and to be output to Excel with each registration group put on a separate worksheet.

Step by Step – Output to Excel

1. Click the **Design Reports** icon, click the **Open an existing report** hyperlink and from **My Reports** open the **School List by Reg Group with SEN Code** created in an earlier **Step by Step**.

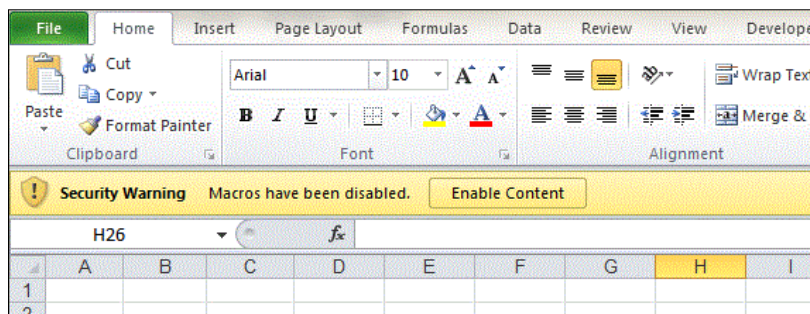


The current output setup is as a Word List. Click on the **Default Output** hyperlink in the **Report Summary** area. Select **Excel** from the list on the left. In the **Excel Settings** section deselect the check box **Go straight to Print Preview**.

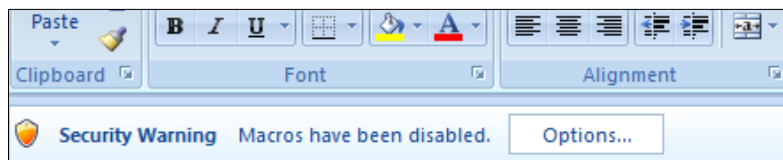


2. Save the report with the same name.
3. **Run** the report selecting one **Year group**, select the **Accept all (bypass filter condition)** check box for the **Reg group** and **SEN Status**.
4. This report will now run and Excel will be loaded.

In **Office 2010** and **2013**, a message may be displayed about a macro security warning. If this message appears, click **Enable Content**.



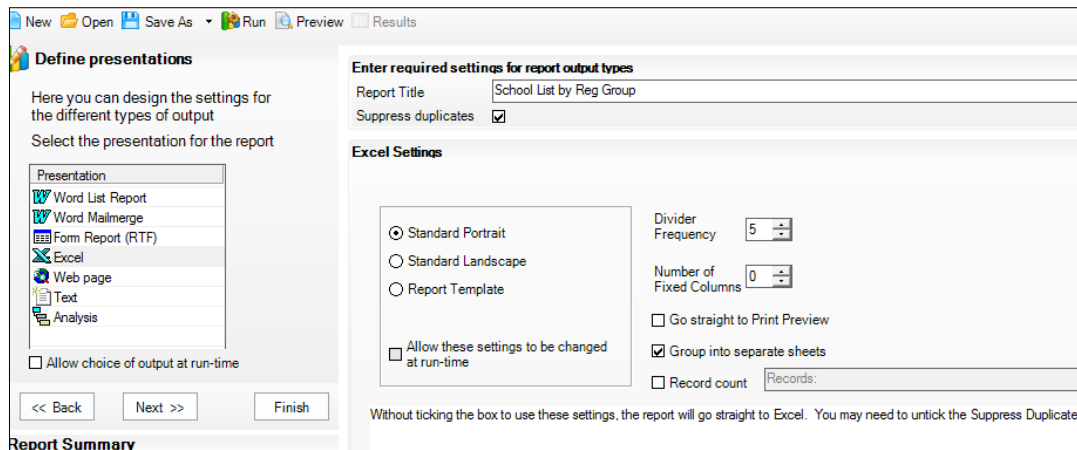
In **Office 2007**, a message may be displayed about a macro security warning. If this message appears click **Options**, select **Enable this content** and click **OK**.



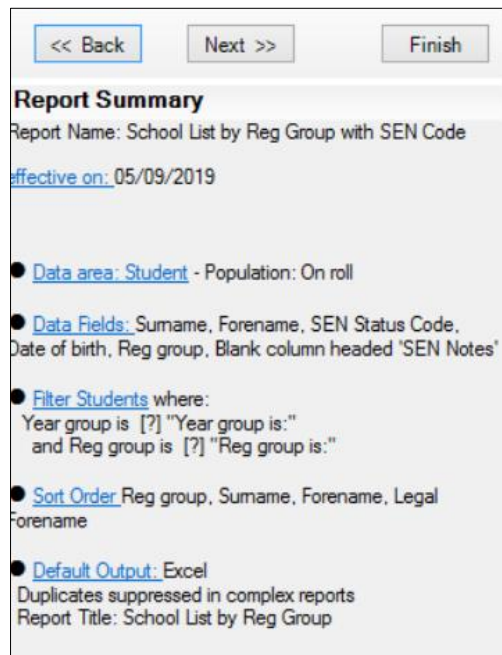
5. Notice that at the moment the list is one continuous list.

	A	B	C	D	E	F
1	Surname	Forename	SEN	DOB	Reg	SEN Notes
2	Abimbola	Deon		14 May 2008	7A	
3	Benson	Zachary		22 December 2007	7A	
4	Bernhagen	Claus		09 May 2008	7A	
5	Berry	Claire		30 April 2008	7A	
6	Candy	Tilly		05 December 2007	7A	
7	Dixon	Freddie		14 May 2008	7A	
8	Doyle	Polly		03 July 2008	7A	
9	Flowers	Monty		15 August 2008	7A	
10	Fox	Willow		12 May 2008	7A	
11	Harrison	Daniel		20 September 2007	7A	
12	Harrison	Michael		20 September 2007	7A	
13	Ibrahim	Sapele		07 November 2007	7A	
14	Jack	Nathaniel		23 November 2007	7A	
15	Lucas	Jordan		11 September 2007	7A	
16	Lucas	Philip		09 May 2008	7A	
17	Mead	Andrew		17 April 2008	7A	
18	Molita	Nicola		04 January 2008	7A	
19	Nott	Elizabeth		31 January 2008	7A	
20	Nuggent	Mila		14 July 2008	7A	
21	Sedlak	Strom		26 July 2008	7A	
22	Shelton	Tyler		23 February 2008	7A	
23	Singh	Inderjit		12 September 2007	7A	
24	Smyth	Cheryl		14 May 2008	7A	
25	Wood	Mia		23 November 2007	7A	
26	Wright	Florence		14 November 2007	7A	
27	Yarlett	Lily		08 August 2008	7A	
28	Yusaf	Adan	E	12 March 2008	7A	
29	Adams	Ethan		28 November 2007	7B	
30	Bassett	Joseph		07 May 2008	7B	
31	Benson	Malik		10 October 2007	7B	
32	Booth	Alfie		15 August 2008	7B	
33	Ching	Susie		14 May 2008	7B	

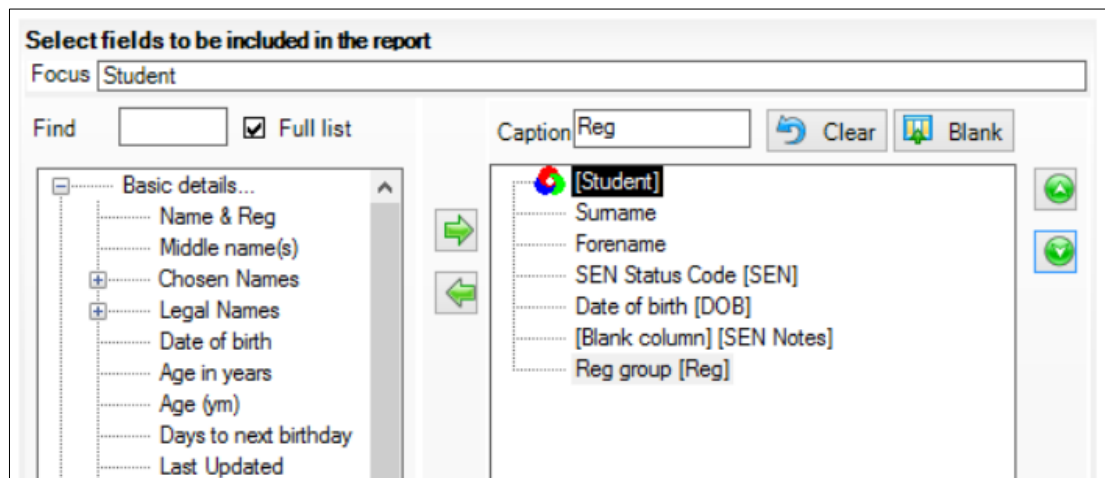
6. Close Excel. Back in SIMS, in the **Define Presentation** section of the report, select the **Group into separate sheets** check box. To define what field should be used to group the data and split onto separate sheets by, two criteria must be satisfied in the report design. The last column of the data and the primary sort order must match as it is this data field that will be used to group the data onto separate worksheets in Excel.



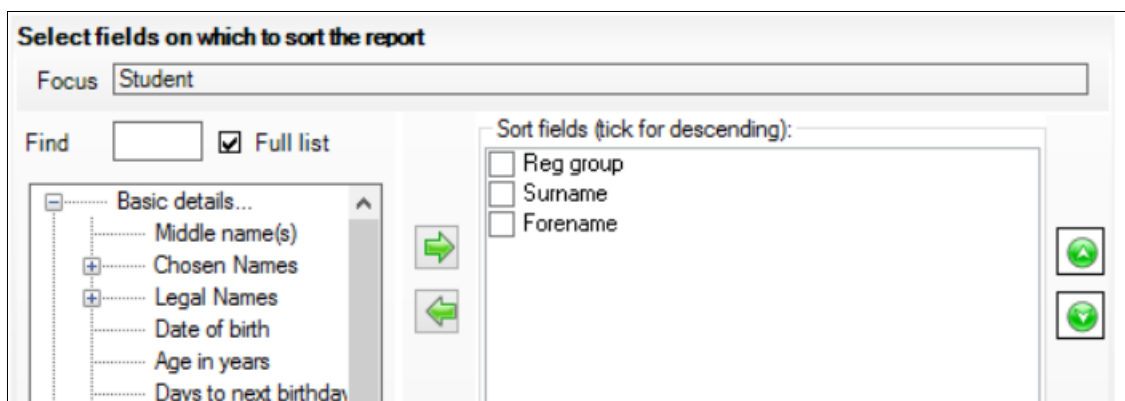
- Navigate back to the **Data Fields** selection step of the wizard using the **Back** button or the **Data Fields** hyperlink.



- Reg group**, as the field to split the workbook by, must be the last field in the list of fields selected. Move it down using the down arrow key in the right margin.

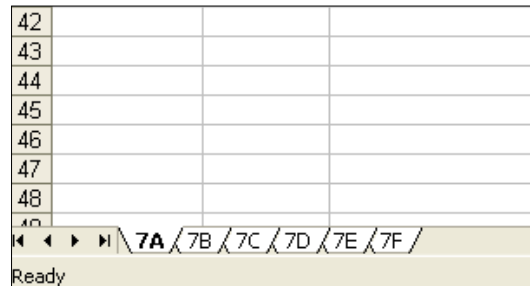


- Navigate to the **Sort Order** step of the wizard.
- Reg group**, as the field to split the workbook by, must be the primary sort field. If it is not already selected, add it and move it to the top.



11. Save the report with the same name.
12. Run the report selecting one **Year group**, select the **Accept all (bypass filter condition)** check box for the **Reg group** and **SEN Status**.

The Excel file produced will have each registration group split onto separate sheets. Notice that the **Registration Group** data field is not listed as a data item in the report when the output is split onto separate sheets as it is on the sheet tab and in the sheet header when printing.



13. Exit Excel.

NOTE: Group into separate sheets works only if the following three options are set up in the report design

- the item you wish to group by is the last selected data field
- the item you wish to group by is the first selected sort order field
- Group into Separate Sheets is selected in the Excel Settings.

Activity – Request for Special Needs Register

The school would like to produce a Special Needs Register in Excel with each stage of the register being on a separate worksheet. Create a report which has the Surname, Forename, Year Group, Reg Group and SEN Status data fields.

09

Basic Analysis

This chapter contains:

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Activity – Number Breakdown.....	94

Chapter Introduction

The analysis tool enables school to analyse two fields against each other. It is a useful way to check data before census, but also if numbers are required it is a quick way to find the information.

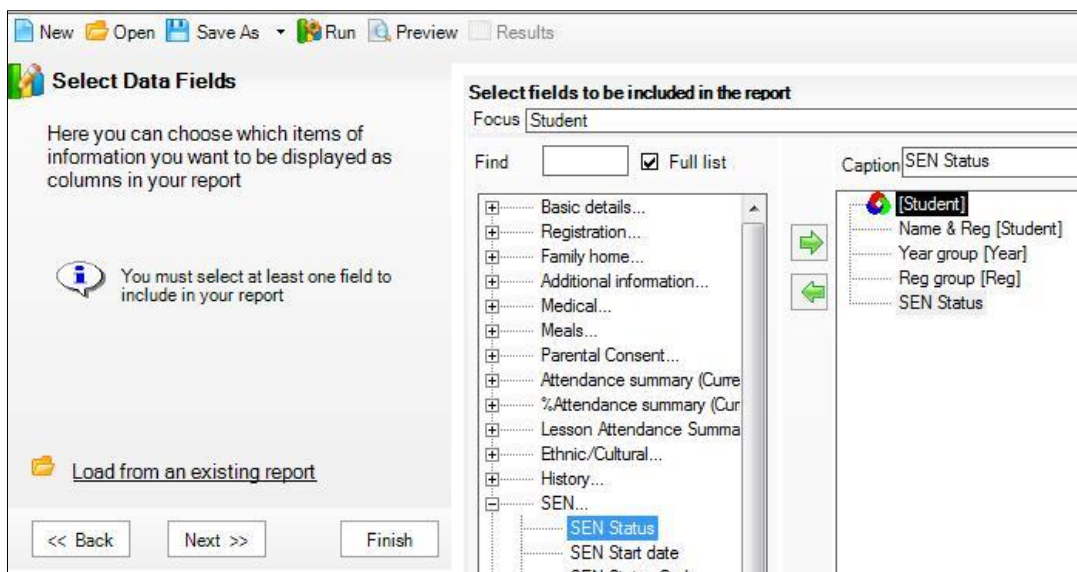
Scenario – Request for SEN Figures

Census is imminent and the school needs to check how many pupils are on their SEN register.

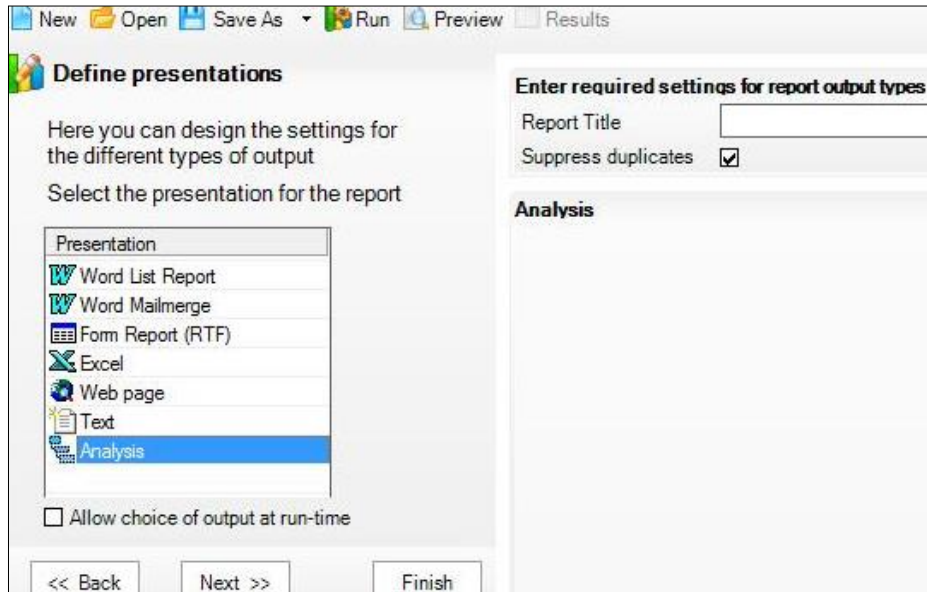
Step by Step – Basic Analysis

1. Select **Reports | Design Report** or click the **Design Reports** icon; click the **Create a new report** hyperlink.
2. In the **Student** data area, click **Next** on the wizard.
3. The report should be based upon pupils on roll. Click **Next** on the wizard.
4. Select the **Name & Reg, Year group, Reg group** and **SEN Status** fields (**Name & Reg** is the first field displayed when you drill down in analysis).

NOTE: A minimum of three fields is required in an Analysis Report.



- Click the **Default Output** hyperlink (a filter or a sort order are not needed as you are analysing the information), and then select **Analysis** from the **Define presentations** panel.



- Click **Run** to run the report and the analysis will begin.
- The **Row** and **Column** field names can be altered. If **Year** is against **Reg** then the analysis is showing how many pupils are in each registration class.

	10A	10B	10C	10D	10E	10F	11A	11B	11C	11D	11E	11F
Year 7	0	0	0	0	0	0	0	0	0	0	0	0
Year 8	0	0	0	0	0	0	0	0	0	0	0	0
Year 9	0	0	0	0	0	0	0	0	0	0	0	0
Year 10	27	27	29	27	27	27	0	0	0	0	0	0
Year 11	0	0	0	0	0	0	26	26	27	26	27	26
Year 12	0	0	0	0	0	0	0	0	0	0	0	0
Year 13	0	0	0	0	0	0	0	0	0	0	0	0
Total	27	27	29	27	27	27	26	26	27	26	27	26

Shading: [Slider] Row: Year Calculate: Total Formula: Count
 Col width: [Slider] Column: Reg Decimals: 0 Count: Count
 Copy to Excel Edit Score Tables Close

- If the **SEN_Status** is selected from the **Column** drop down list, the grid produced will display the number of pupils with each level of special needs in each year group.

	Monitor	No Spec	SEN	Sup	Statemer	(None)	Total
Year 7	1	1	6	1	150	159	
Year 8	0	0	9	1	150	160	
Year 9	0	20	9	0	151	180	
Year 10	0	1	2	2	172	177	
Year 11	0	3	5	0	150	158	
Year 12	0	2	0	0	90	92	
Total	1	27	31	4	863	926	

- Click one of the numbers and a list of the pupils will be displayed, therefore informing you who makes up the number (the **Name & Reg** field was used first in our design so that this information is displayed when you click the number).
- Rows and columns can be combined if you want to see how many **SEN Support** and **Education, Health and Care Plan** pupils in the school have combined. These can be displayed in the report as one column. To do this increase the column width by clicking the **Col Width** line and increasing it.

	Education, Health and Care Plan	Monitor Language Skills	No Special Educational Needs	SEN Support
Year 7	3	1	1	6
Year 8	4	0	0	8
Year 9	6	0	19	9
Year 10	5	0	1	2
Year 11	4	0	3	5
Year 12	3	0	2	0
Total	25	1	26	30

- When you can see the full titles, click **SEN Support** and drag it on top of the column named **Education, Health and Care Plan**; the numbers will now be combined.

	Monitor Language Skills	No Sp Education, Health and Care Plan	SEN Support	Statement
Year 7	1	9		1
Year 8	0	12		1
Year 9	0	19	15	0
Year 10	0	1	7	2
Year 11	0	3	9	0
Year 12	0	2	3	0
Total	1	26	55	4

You can also do this with the rows, putting a specific key stage together.

- If you want to unmerge a column or row, select the column then right-click the heading; the option **Unmerge selected columns** can also be used.
- Click the **Shading** line and drag the pointer a little of the way along the line. The analysis grid will now start to display colour. The deepest colour is used for the largest number.

	Monitor Language Skills	No Special Educational	Education, Health and Care	SEN Support
Year 7	1	1	3	6
Year 8	0	0	4	8
Year 9	0	19	6	9
Year 10	0	1	5	2
Year 11	0	3	4	5
Year 12	0	2	3	0
Total	1	26	25	30

- Notice that in **Calculate**, you are currently looking at **Total**, but could select **Average** or **% Population**. **% Population** can be very useful for finding out what percentage of the population is being represented.

	Monitor Language Skills	No Special Educational Needs	Education, Health and Care SEN Support	Total
Year 7	0%	0%	0%	1%
Year 8	0%	0%	0%	1%
Year 9	0%	2%	1%	1%
Year 10	0%	0%	1%	0%
Year 11	0%	0%	0%	1%
Year 12	0%	0%	0%	0%
Total	0%	3%	3%	3%

- To send this grid to Excel, click **Copy to Excel**.
- Notice that the values and the formulas are carried through. This is useful if you find you have missed someone as you can add them manually into Excel.

	Monitor L	No Special Education	SEN Support	Statemen	{None}	Total
Year 7	0.107991	0.107991	0.323974	0.647948	0.107991	17.17063
Year 8	0	0	0.431965	0.863931	0.107991	17.27862
Year 9	0	2.051836	0.647948	0.971922	0	19.43844
Year 10	0	0.107991	0.539957	0.215983	0.215983	18.03456
Year 11	0	0.323974	0.431965	0.539957	0	15.76674
Year 12	0	0.215983	0.323974	0	0	9.395248
Total	0.107991	2.807775	2.699784	3.239741	0.431965	90.71274

- Click **Close** to close Excel. Click **Close** to close **Analysis** and close the report without saving.

Activity – Number Breakdown

The school’s chair of governors would like a breakdown of the number of pupils from different ethnic groups. Use the Name & Reg, Year Group, Reg Group and Ethnicity fields.

- In year 8, or year 3, what are the names of the pupils who have the ethnicity of Italian?
- How many pupils in the school have an ethnicity of Japanese?

- In key stage 2 (KS2) or key stage 3 (KS3) how many pupils are Black Caribbean?
- How many pupils are in year 10, or year 3?

10

Working with Reports

This chapter contains:

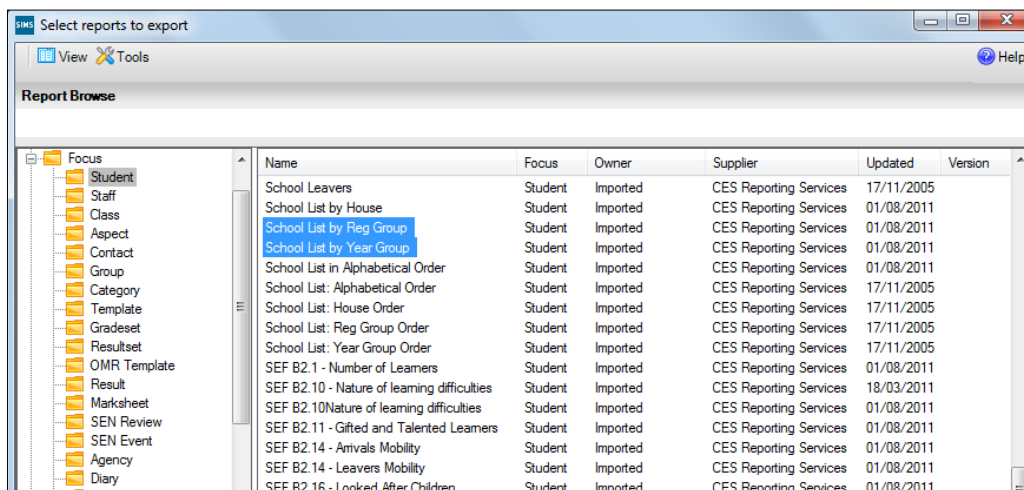
Chapter Introduction.....	96
Step by Step – Exporting Reports.....	96
Step by Step – Importing Reports.....	98
Step by Step – Deleting Reports.....	99
Scenario – Request to Use My Favourite Reports Panel	100
Step by Step – Running Reports from the Favourite Panel on the Home Page.....	100

Chapter Introduction

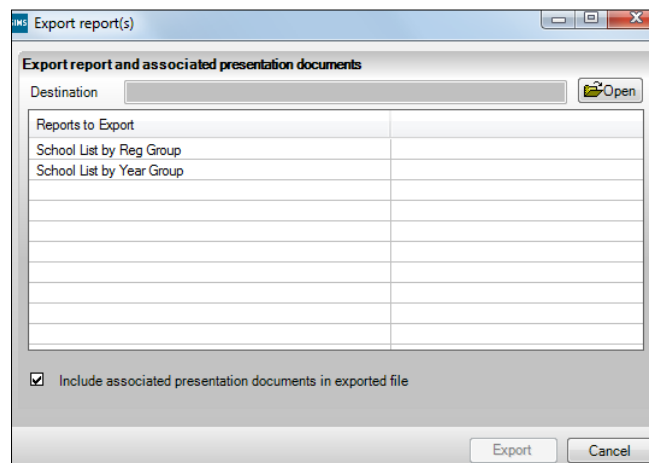
This chapter explains how to import and export reports, delete reports and use the **Favourite Reports** panel on the SIMS Home Page. Import and export is a useful way of sharing reports between schools, consortiums and the LA.

Step by Step – Exporting Reports

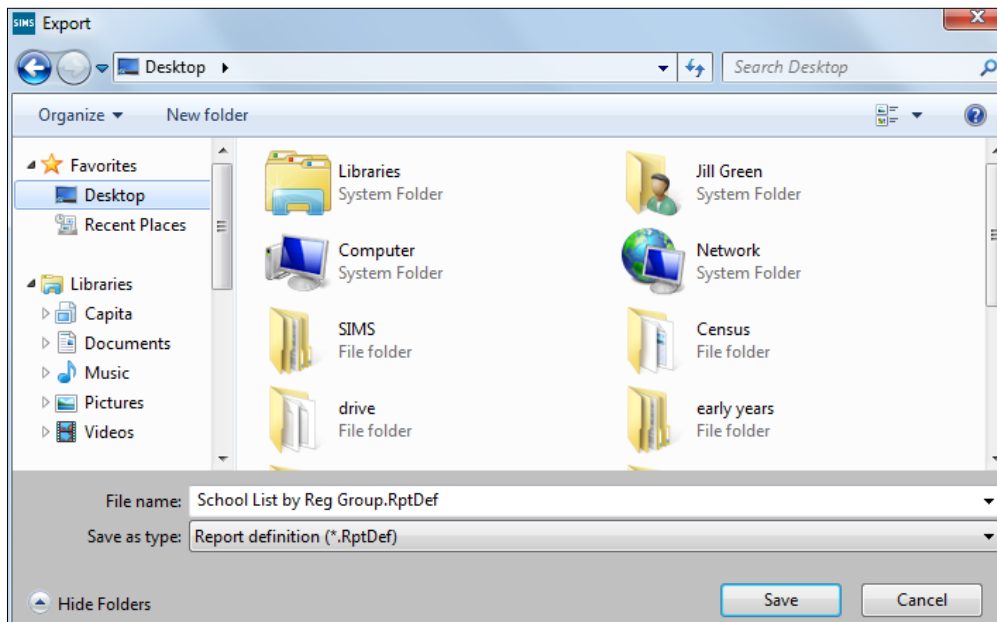
1. Exporting reports is carried out by selecting **Reports | Export**.
2. Select a report or several reports using the **Shift** key or **Ctrl** key.



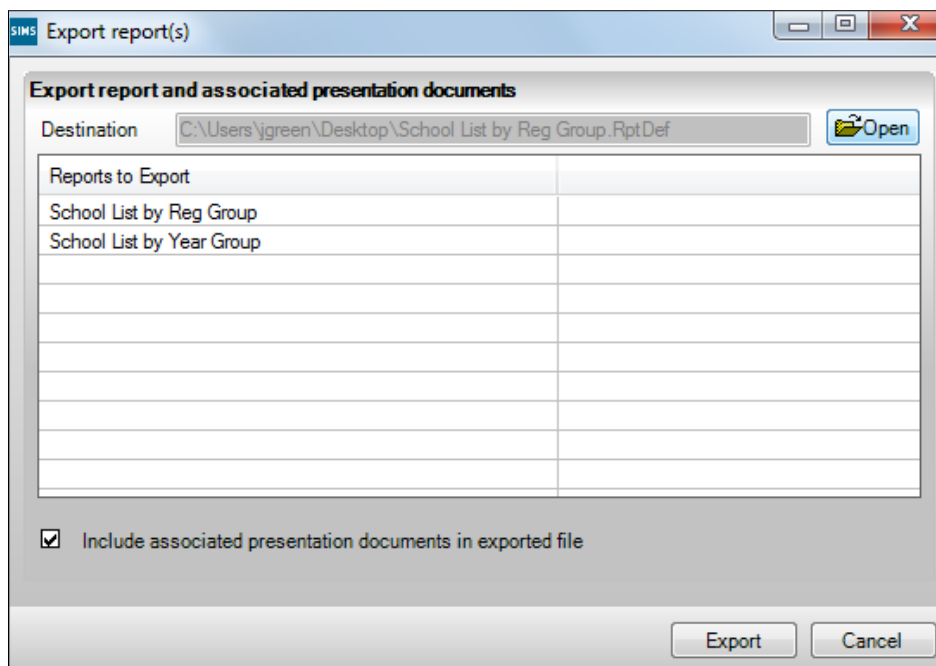
3. Click **OK** and the selected reports will be listed as **Reports to Export**.



- Click **Open**, and then select a location to export the file. The best place for this might be the desktop, or a portable device.



- Name the file, for example, **Reports for Consortium**, and click **Save**.
- Click **Export** and the report definitions are saved in the file **Reports for Consortiums.rpt**.

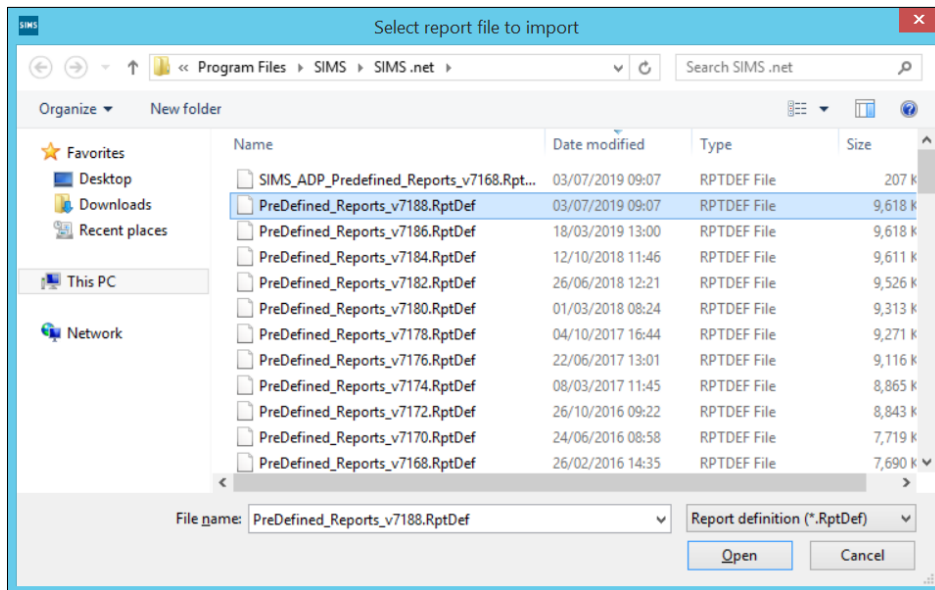


Note that the report definitions have been saved, no information about the actual pupils in the school is gathered in the export process.

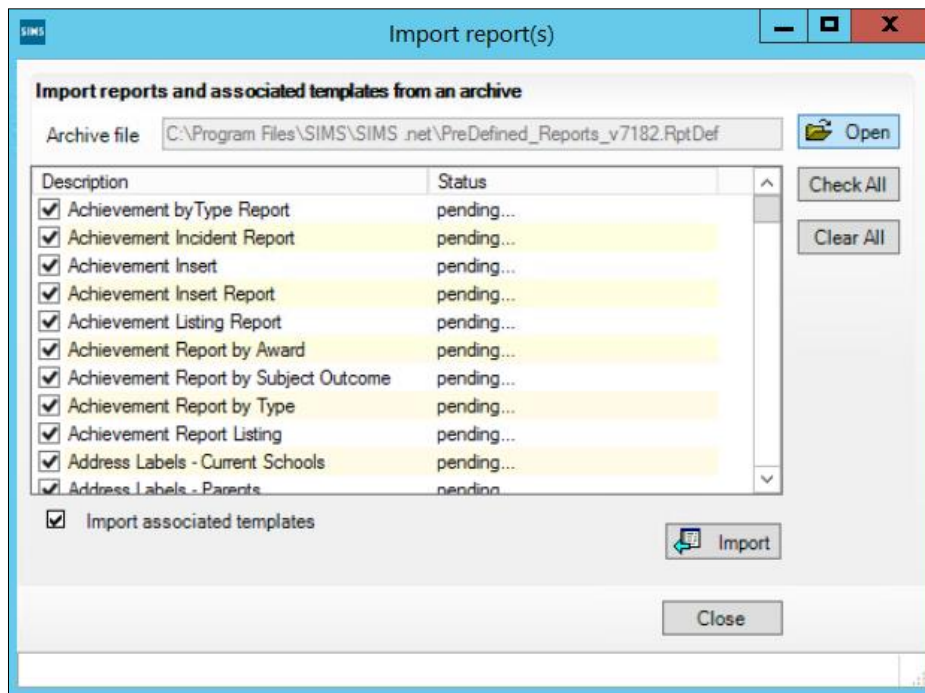
The reports for the **consortiums.rpt** file could now be given to those schools requiring the report definitions.

Step by Step – Importing Reports

1. To import a report definition file, select **Reports | Import**.

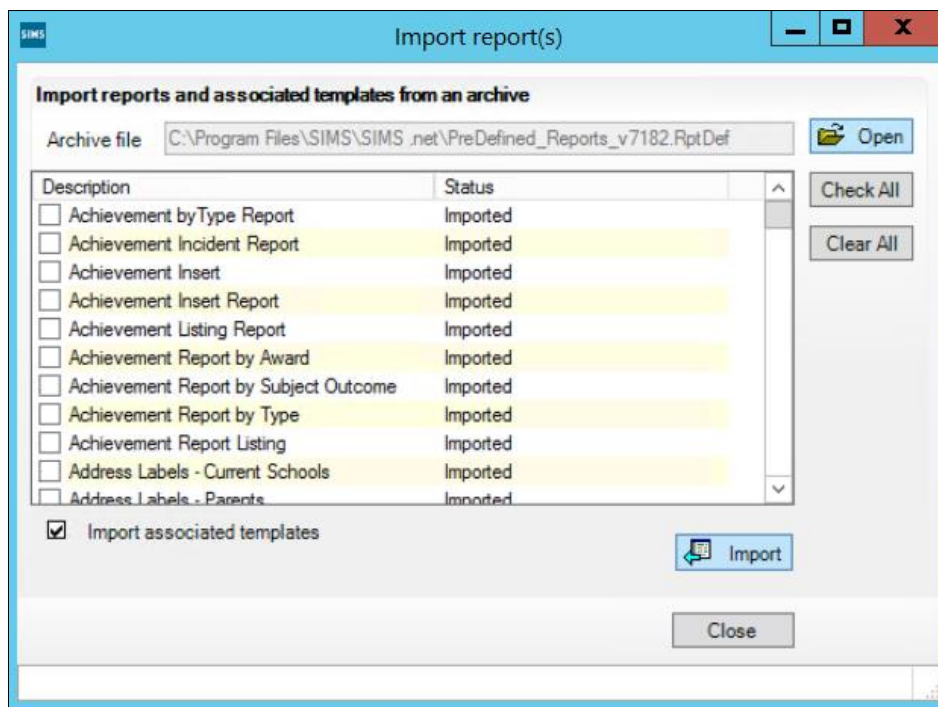


2. In the **Select report file to import** dialog, click **Open** and find the report definition file. For the purposes of today’s training, look at the **c:\Program Files\SIMS\SIMS.net** folder and select one of the **Predefined_Reports**; then click **Open**.



3. A list of reports should be displayed in the **Import report(s)** dialog, with the word **pending** next to them.
4. You can **Check All** or **Clear All**, and then select the check boxes of the reports to bring into SIMS.
5. Having selected some reports, click **Import**.

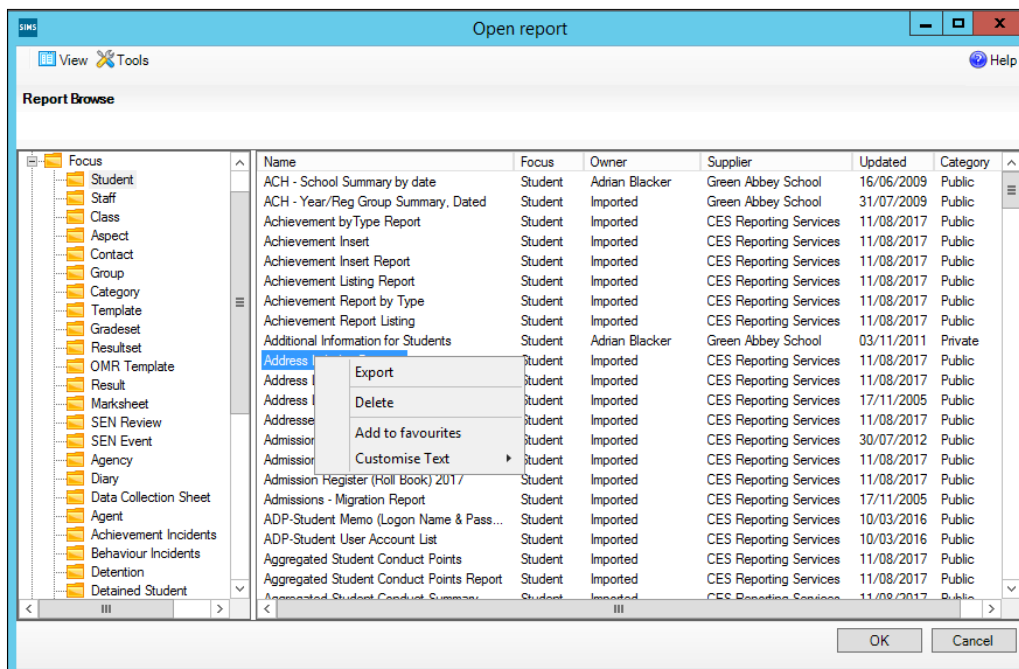
6. The selected reports will now have the **Status** changed to **Imported**.



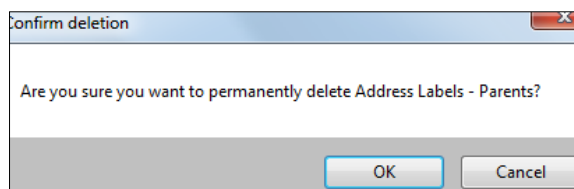
7. Click **Close** and the reports have been imported.

Step by Step – Deleting Reports

1. Select **Reports | Design Report** to display the **Report Designer**. Click the **Open an Existing Report** hyperlink.
2. Expand the **Focus** folder, and then select the **Student** folder, select the **Address Labels – Parents** report.



3. Right-click the report, and then select **Delete** from the menu displayed.
4. You will be asked, **Are you sure you want to permanently delete Address Labels – Parents?**, click **OK**.

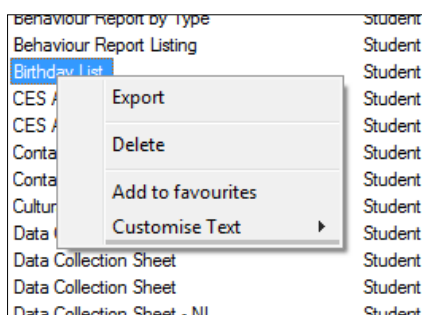


Scenario – Request to Use My Favourite Reports Panel

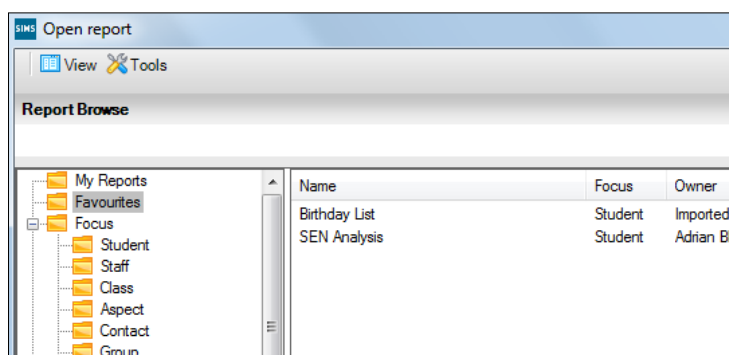
The heads of year are asking for a quick way to run their reports from the **SIMS Home Page**.

Step by Step – Running Reports from the Favourite Panel on the Home Page

1. Select **Reports | Design Report** or click the **Design Reports** icon.
2. Click the **Open an existing report** hyperlink. Expand **Focus** and select **Student**.



3. Find the report that you would like to have as a favourite. For this example, select **Birthday List**, and then right-click the report and select **Add to favourites** (this will add a shortcut to the report in the **Favourites** folder).
4. Select another report and add this to the **Favourites** folder.



NOTE: Multiple reports can be selected by holding down the **Ctrl** key.

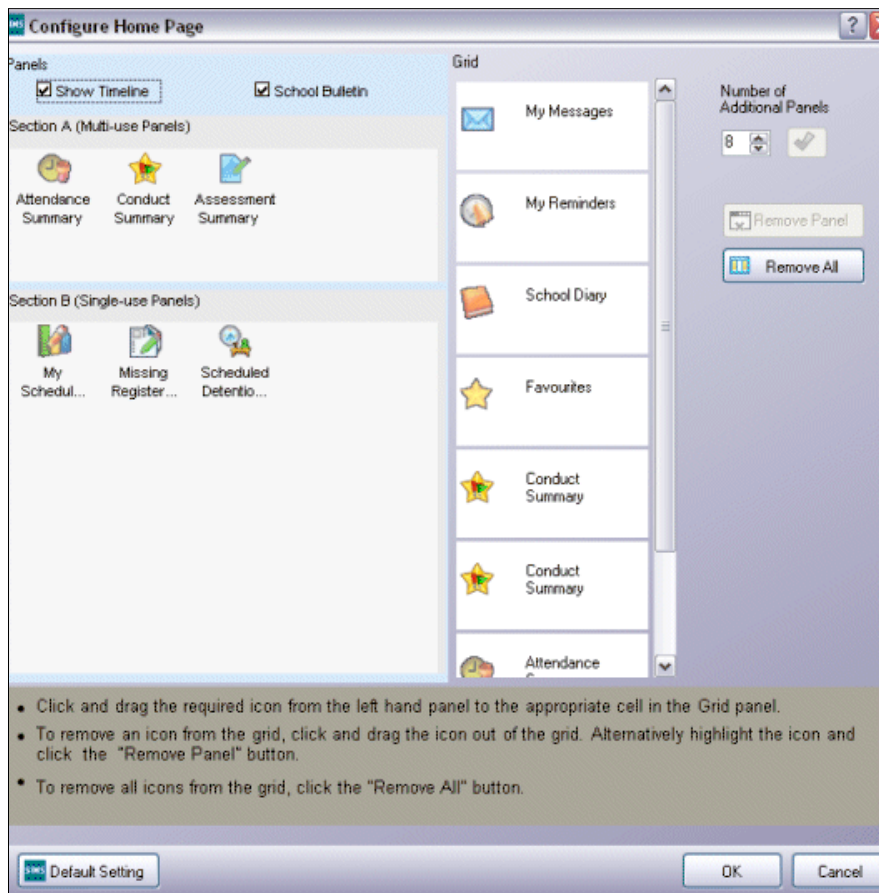
5. Click **Cancel** on the **Open Report** dialog to display the **Report Designer**.
6. Go back to the SIMS Home Page (you may need to refresh it – select **Focus | Home Page**). If you have the **Favourites** panel set up on the SIMS Home Page, you will see the reports when you click the **Reports** tab.
7. Click the **Birthday List** report and observe it run.

Favourites		
Name	Supplier	Updated
Achievement Listing Report	CES Reporting Services	20/03/2016 10:46:00
Birthday List	CES Reporting Services	20/03/2016 10:46:00
SEN Analysis	Green Abbey School	21/10/2008 21:19:00
Alphabetical Student List	CES Reporting Services	17/11/2005 09:17:00

Page(s): 1

Menus Reports Students Marksheets

- If you do not see the **Favourites** panel, click the **configure spanner** on the top right-hand corner on the SIMS Home Page. The dialog below will be displayed and you can drag and drop **Favourites** onto an empty cell on the right.
- If you do not have any empty cells increase the **Number of Additional Panels** and click the **Green Tick** icon.



- Clicking **OK** actions the changes.
- You may need to close the **SIMS Home Page**, and then re-open it for the reports to be displayed.
- Click one of the **Favourite** reports to run it.

A

Appendix A – Additional Training Examples

This chapter contains:

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Activity – Adding/Removing Fields to a Pre-defined Report.....	102
Activity – Creating New Reports with Filters.....	102
Activity – Labels Mail Merge for an Academic Class.....	102

Chapter Introduction

This chapter contains several activities which you may encounter. These are included to consolidate the content of the course, giving you the opportunity to practise what has been covered. Some activities may only be applicable to schools that use a timetable.

Activity – Adding/Removing Fields to a Pre-defined Report

- You have been asked by the head teacher to produce the Birthday List report for the school. This list should include the pupils' gender.
- The Cultural and Ethnic Information report contains a field called Ethnic Category. Remove this field from the report and save the report.
- The admissions officer has asked that the pupils' admission date and admission number be added to the School List by Reg Group report.

Activity – Creating New Reports with Filters

- There are several pupil records in SIMS that have a Quick Note attached. The school wants to see what the Quick Note says. Create a report to find pupils who have a Quick Note.
- The school has created a User Defined Field called Locker Number. All Year 10 and Year 11 pupils should have a locker number recorded. Create a report to find those pupils who do not have a Locker Number recorded.

NOTE: If using the Waters Edge database select the User Defined Field called Premature, and then create report to find out which pupils in the whole school are listed as premature.

- Mr Blacker would like to have a report that gives the address details for pupils in class 11x/Ge1. Create a report containing the pupils' name and address details for class 11x/Ge1.

Activity – Labels Mail Merge for an Academic Class

- Create a new report with a Focus of Student and a Student Status of On roll.
- In the Data Fields screen select Legal Surname, Legal Forename, Year Group, Reg Group, Address Block, Parental Address and Parental Salutation.
- In the Filter Student screen add the Classes sub-report.
- Select the Class Name field, and then type 11x/Ge1 in the Value box. Tick the Prompt at runtime check box.

- Click on the Default Output hyperlink in the Report Summary panel and select Word Mail Merge.
- Select New and using the Mailings tab create a labels template.
- Save the Word document and click Close.
- Click Save As in SIMS and name the report Labels by Academic Class.
- Run the report.

B	<h2 style="margin: 0;">Appendix B – Running Scheduled Reports</h2>
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This chapter contains:

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Step by Step – Creating a Scheduled Task – Windows 7	104
Step by Step – Selecting Reports for Scheduling	109

Chapter Introduction

Many members of staff within a school perform a variety of regular tasks and they require the ability to manage these tasks effectively within SIMS. Staff can now set up an automated scheduler to run selected reports for them. The details of these reports can be viewed from the My Scheduled Reports panel on their personal Home Page.

Setting up the Report Scheduler

Permissions Required

Any valid SIMS user can setup a scheduled task using the AutoReports.exe. However, for running any scheduled reports, permissions for the following processes in SIMS are required:

- **Designing or Running a Report** – users must have sufficient access rights to design or run the existing report.
- **Execute Schedules Report** – users must have sufficient access rights to execute the scheduled report.
 - a) The Execute Scheduled Task permission can be checked via **Focus | System Manager | Manage Users**.
 - b) b. Search for then double-click the name of the applicable user to display the **User Details** page.
 - c) c. In the Permissions panel, navigate to **Core, Home Page, Report Execution Manager, Execute Scheduled Report, Execute**.
- Document Management Server - users must have sufficient rights to access the Document Management Server (DMS), to ensure that it is configured and running correctly. This permission is also required for running the report definitions and for storing the report outcomes on the Document Management Server.

Users of SIMS can now specify the names of individual reports that they want to be run automatically at any time during the day and during off peak times, for example, overnight. The benefit of running the reports at off peak times enables system administrators to minimise any potential performance issues that may otherwise be experienced by users

To enable users to benefit from the automatic running of reports, system administrators must first specify an automated task using the Windows® Scheduled Task wizard.

Step by Step – Creating a Scheduled Task – Windows 7

The automated task should be set up on the SIMS SQL server machine where the SIMS database is held. The task only runs successfully if the Document Management Server and the SIMS SQL server machine are both available. Once the automated task has been set up, individual users can specify which reports they want to run automatically on their PCs.

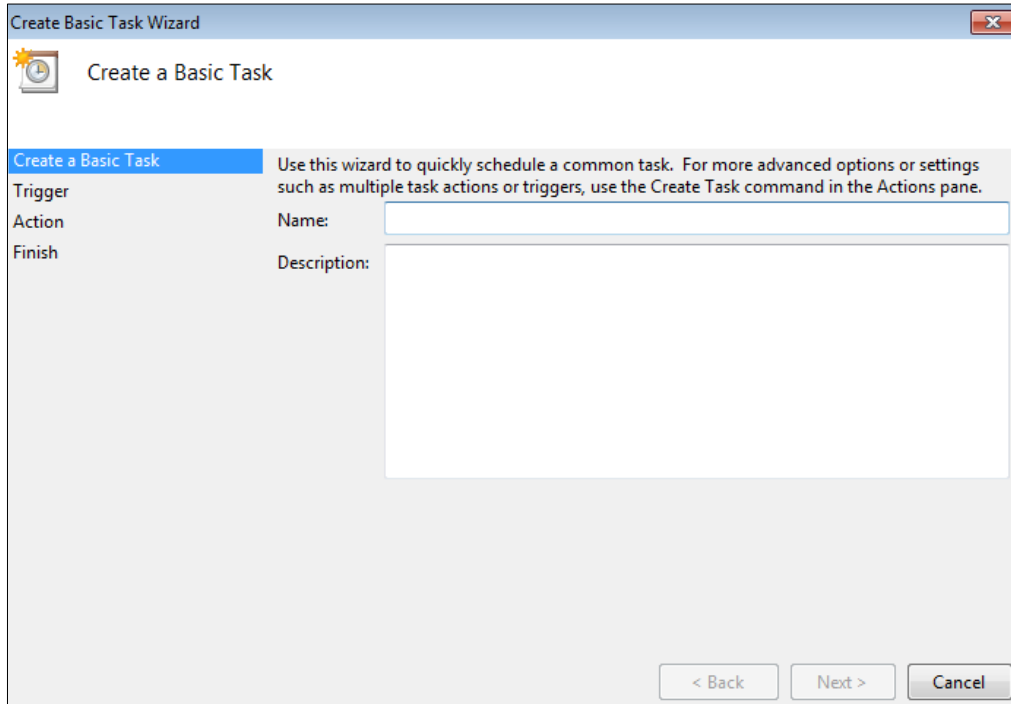
1. Ensure that you have logged into Windows as an administrator.

2. Open the Windows Start menu.
3. Select **All Programs | Accessories | System Tools | Task Scheduler** to display the **Task Scheduler** page.

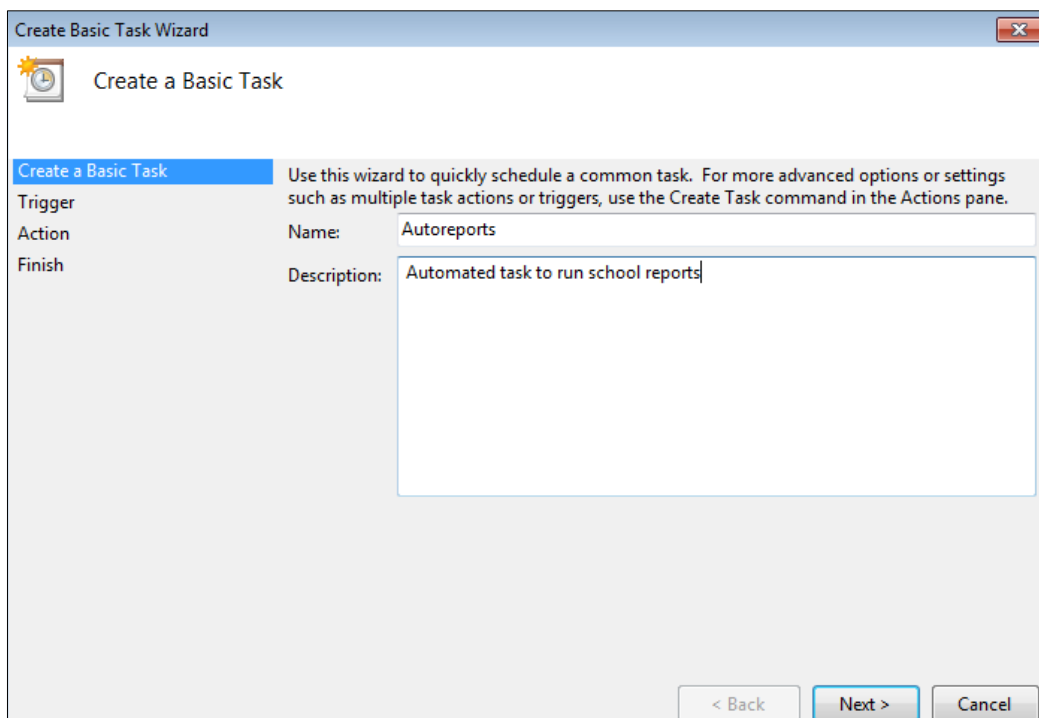
Alternatively, click **Control Panel** then **System and Security**.

If administrator rights have been set up you may be required to enter a **Password**.

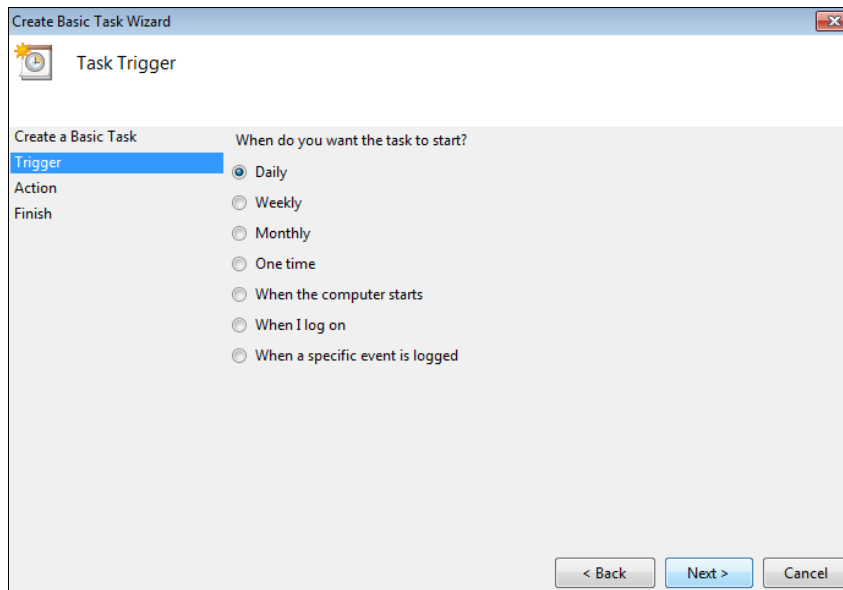
4. Select **Action | Create Basic Task** to display the Create Basic Task Wizard. Alternatively, select **Create Basic Task** from the **Actions** panel.



5. Enter a suitable **Name**, e.g. AutoReports, and a **Description** (optional) for the scheduled task.



- Click **Next** to display the **Task Trigger** page.

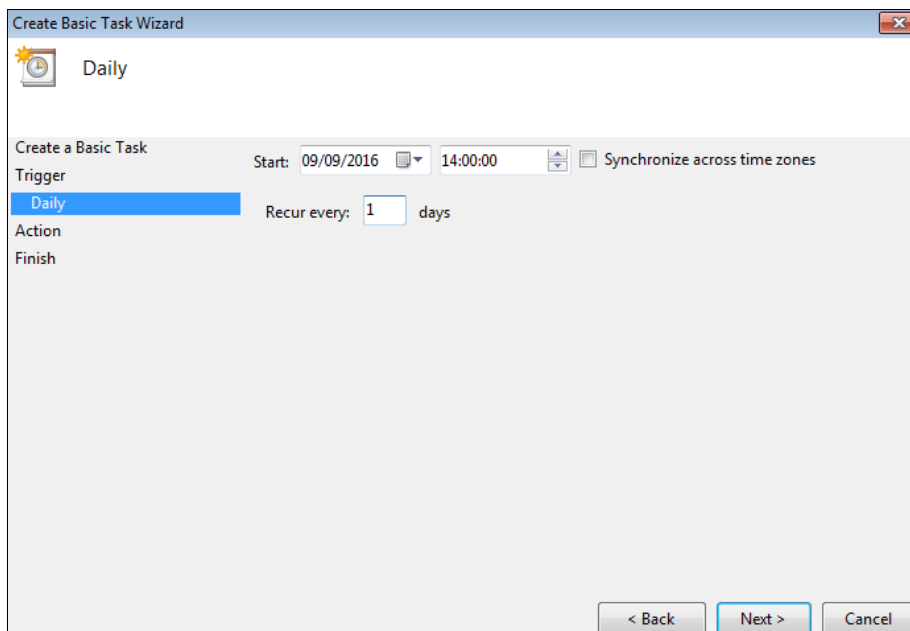


- Select the appropriate radio button to indicate when you require the task to start.

Depending on the number of reports to be run, selecting the **Daily** option is most likely to provide a satisfactory result.

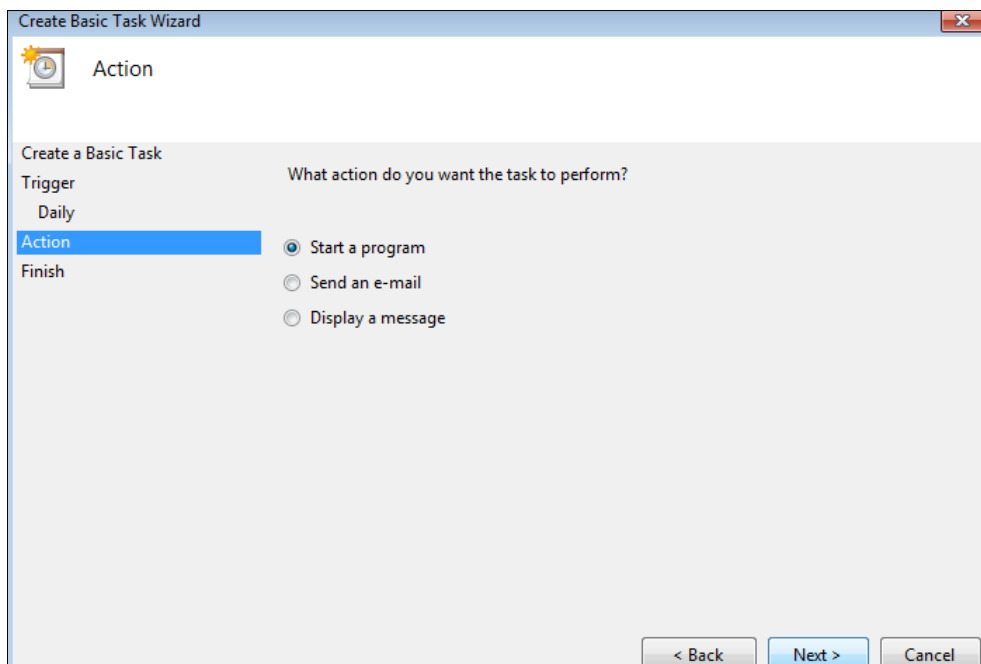
NOTE: Before setting up the Windows Scheduled Task, system administrators may wish to canvass the opinion of senior users to ensure that the frequency of the task is sufficient for their purposes. For example, the frequency of the reports scheduled to run automatically in SIMS must be set to run Daily if the Windows Scheduled Task has been set to run on a Daily basis.

- Click **Next** to display the **Daily** page.



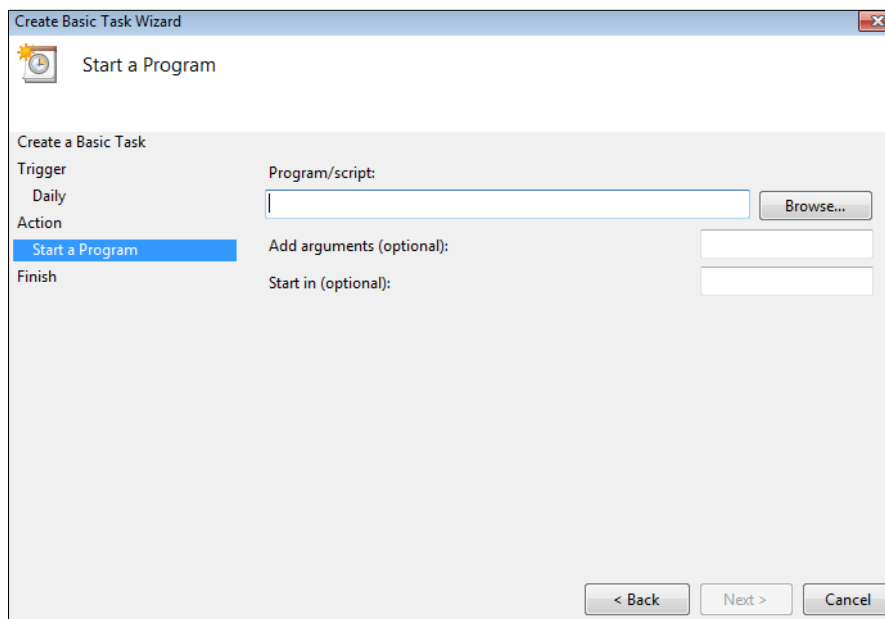
- Specify the day, month, year and time that the task is required to **Start**.
- Enter the frequency of days that you wish the scheduled task to run in the **Recur every: [number] days** field.

11. Click **Next** to display the **Action** page.



12. Ensure that **Start a program** is selected.

13. Click **Next** to display **Start a Program** page.



14. Click **Browse** and navigate to C:\Program Files\Microsoft SQL Server\MSSQL\$SIMS\Binn (where C: is the network drive where SIMS is installed).

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.

15. Highlight the applicable scheduled task filename, e.g. AutoReports.exe then click **Open** to return to the **Start a program** page.

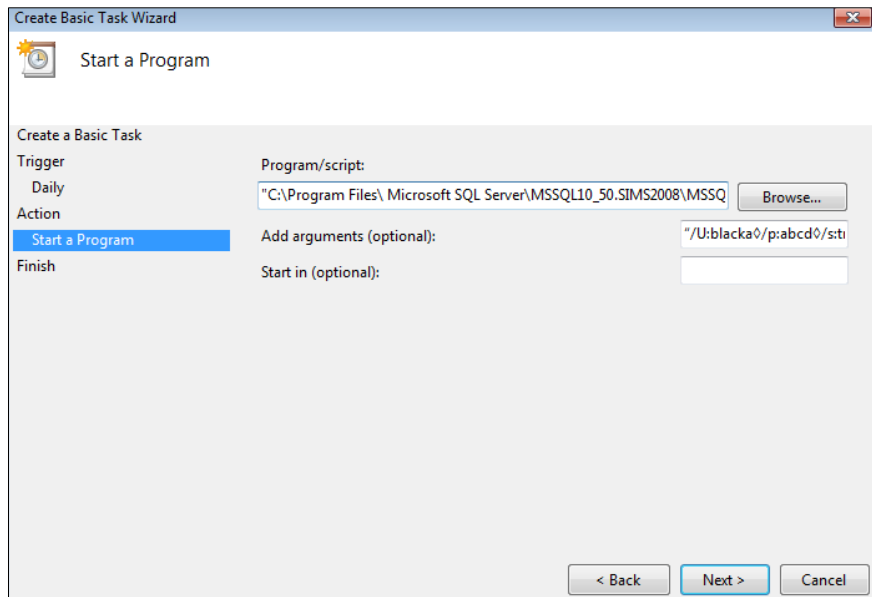
16. Enter the following text in the **Add arguments (optional)** field:

"/U:<username>◇/p:<password>◇/s:<SIMSInstance>◇/d:<databaseName>

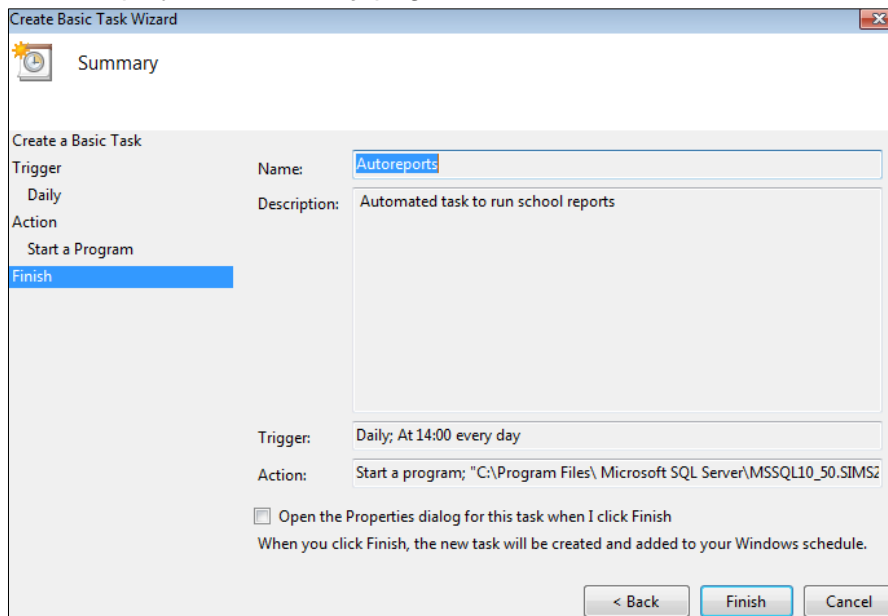
For Example:

"/U:blacka◇/p:abcd◇/s:training◇/d:engga_sims◇/R:C:\simstrain\EngGA"

IMPORTANT NOTE: It is essential that spaces are included, as indicated by the '◇' symbol in the previous examples. Archiving parameters are case sensitive. It is essential that a copy of the Connect.ini file is located in the Binn folder, which is located in the MSSQL folder.



17. Click **Next** to display the **Summary** page.

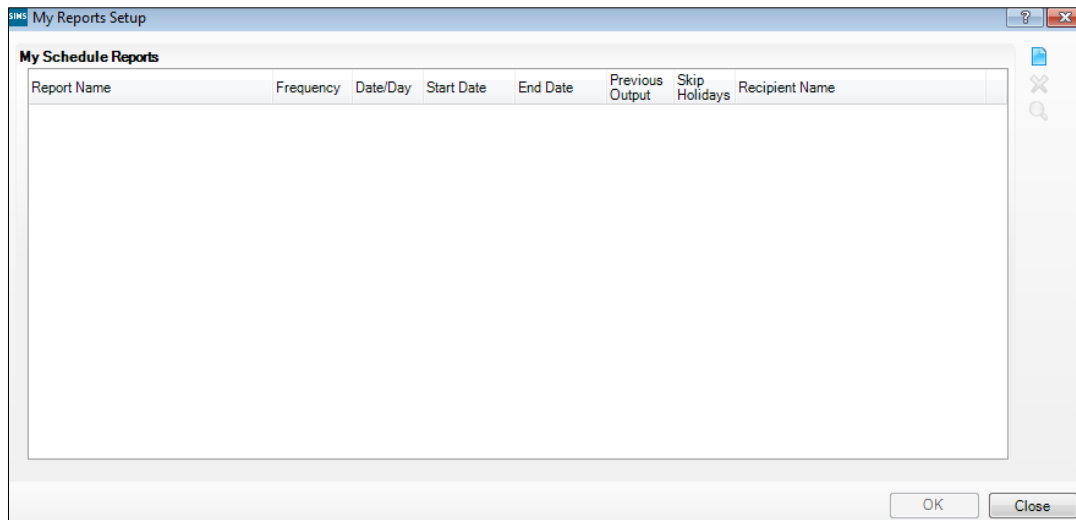


18. Click **Finish** to return to the Task Scheduler page where the newly created scheduled task is displayed in the Active Tasks panel.

Step by Step – Selecting Reports for Scheduling

1. Click **Focus | Alerts | Schedule Reports** to display the **My Reports Setup** dialog.

Any existing reports that have already been scheduled are displayed in the **My Schedule Reports** panel. **The Report Name, Frequency, Date/Day, Start Date, End Date, Previous Output, Skip Holidays** indicator and the **Recipient Name** are all listed.



It is possible to amend any or all of the current scheduled report details from this dialog.

NOTE: Users must ensure that reports are scheduled in line with the Windows Scheduled Task that has been set up. For example, selecting the Frequency of the reports in SIMS to run on a Daily basis is not very beneficial if the Windows Scheduled Task has been set up to run on a Weekly basis.

Changing the Frequency

Identify the required report, click into the **Frequency** field and select an alternative frequency from the drop-down list.

Changing the Date/Day

Identify the required report, click into the **Date/Day** field and overtype the current number. As **Monthly** is the last option in the **Frequency** field, the maximum number entered in the date/day field cannot exceed 31.

Changing the Start Date/End Date

Identify the required report, click into the **Start Date** or the **End Date** field and click the drop-down arrow to display the Calendar. Select an alternative date. The **End Date** selected must be greater than the **Start Date**.

Changing the Previous Output

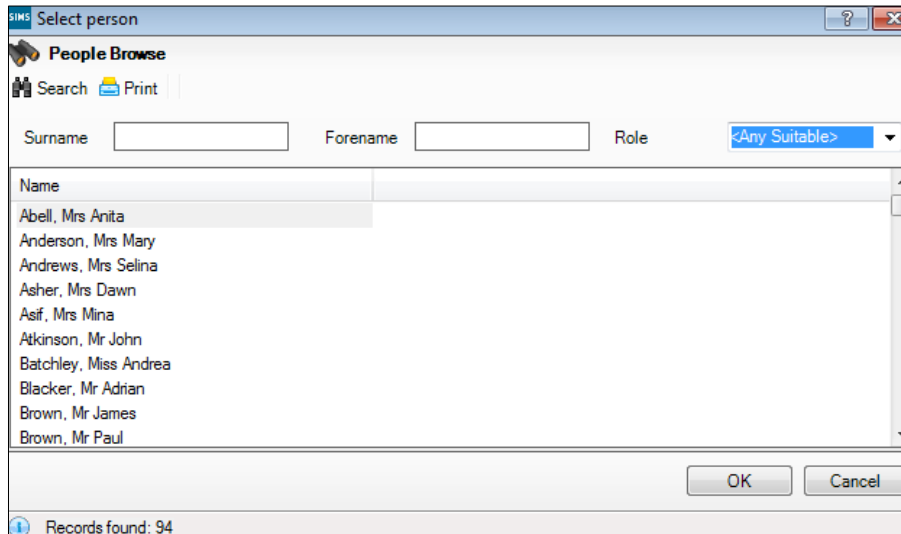
Identify the required report, click into the **Previous Output** field and select either **Leave** or **Delete** from the drop-down list.

Changing the Skip Holidays

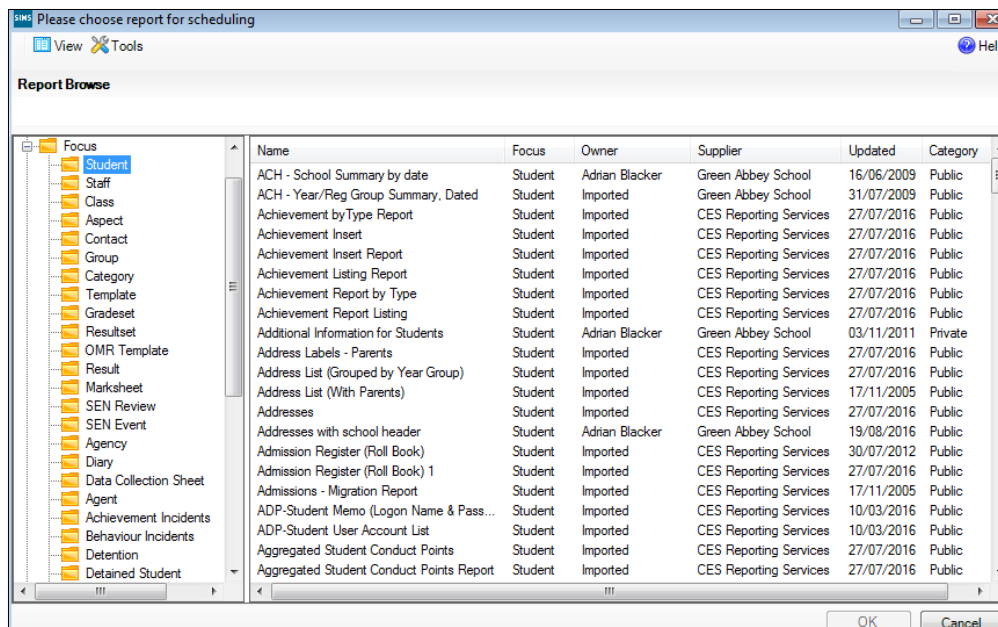
Indicator Identify the required report, click into the **Skip Holidays** field and either select or de-select the check box.

Changing the Recipient Name

Identify the required report and click Choose Recipient to display the **Select Person** dialog.



2. Enter the individual's **Surname** and/or **Forename** or select their **Role** from the drop-down list.
3. Click **Search** to list all individuals who match the search criteria you have entered.
4. Highlight the required person from the list displayed and click **OK** to select them.
5. It is also possible to delete any previously scheduled report details from this dialog. Highlight the relevant report and click **Delete** to remove it from the schedule.
6. Click **New Report** to display the **Please choose report for scheduling** dialog.



7. In the left-hand side of the dialog, a list of all the existing report focus folders is displayed. Expand the list until you locate the required report definition.
8. Highlight the required report definition and click **OK** to add it to the schedule. Some reports require the entry of report parameters to be specified before they can be added to the report schedule.

In this case, the **Enter Parameter Values for Report** dialog is displayed.

When a report is designed, it is possible to apply various criteria to limit the records returned. For example, a report could be limited to all the pupil/students in a particular year.

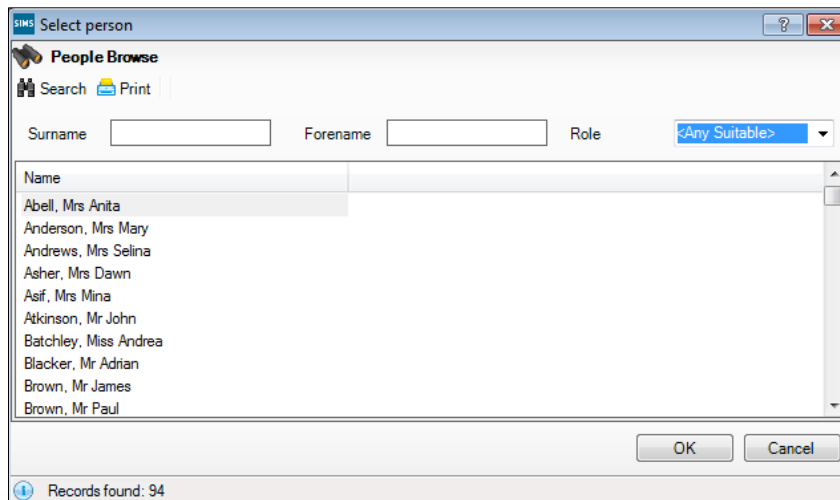
To provide greater flexibility, it is also possible to enter values for these criteria when a report is run. You could for example, be prompted to select the **Years** that you wish to be included in the report. This enables you to run the same report, selecting a different year each time.

If a report has been set up in this way, when prompted to enter **Run Time Parameters**, you enter values, such as **Surnames**, choose existing values by selecting appropriate check boxes or specify a required date.

Users can refine the report using the **Show All** filter. This option is available when defining the run-time parameters and when designing a new report and specifying a new filter.

The **Show All** filter is switched off by default, thus ensuring that only active groups are displayed for selection. Clicking in the Show All filter check box displays all groups, both active and inactive. For example, Year Groups and Registration Groups that are no longer in use and have been removed from the Pastoral Structure can be selected and included in the report.

9. Click **OK** to continue.
10. The **Recipient Name** defaults to the name of the user currently signed on to SIMS. Click **Choose Recipient** to display the **Select Person** dialog and identify an alternative recipient for the report output, if required.



11. Enter the individual’s Surname and/or Forename, or select their **Role** from the drop-down list.
12. Click **Search** to list all individuals who match the search criteria you have entered.
13. Highlight the required person from the list displayed and click **OK** to select them.
14. Continue scheduling reports in this way until all the required reports are listed in the **My Reports Setup** dialog.
15. Click **OK** to close the dialog.

Viewing Errors in the Schedule

If users experience problems with the AutoReports scheduled task that they have set up, we recommend accessing the Event Viewer through **Start | Control Panel | Administrative Tools | Event Viewer** to check for errors.

Viewing My Scheduled Reports on the Home Page

Once generated, the reports are stored on the Document Management Server (DMS) and a link to the report is displayed in the **My Scheduled Reports** widget on the SIMS Home Page.

If the number of scheduled reports that have been run exceeds the number that can be displayed in the My Scheduled Reports widget, the **More** hyperlink enables access to the additional reports in full screen - mode.

To print a report in full screen mode, highlight the required report then click **Open** to display the My Report output dialog. To print this information, the **Print**.

To view the report output, click the **Click here to view the report** hyperlink to open the application associated with the selected report format, from where the report can be printed.

A report notification can be deleted from the My Scheduled Report widget (in full screen mode) by highlighting it then clicking **Delete**.