

LEAMIS News Bulletin  
Please Read Carefully

|  |   |
|--|---|
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| <b>Subject/Title</b>   | SIMS Pupil Database End of Year Guidance  |
| <b>Date:</b>   |   |
| <b>Bulletin Version:</b>   | 1.0   |
| <b>Relevant to:</b>  | NON-Leicestershire Primary Schools  |
| <b>Contents:</b>   | <p>The Summer 2015 end of year processes have been documented step by step. It is important that the steps are followed in the correct order and include the following:</p> <ul style="list-style-type: none"> <li>• Create new academic year</li> <li>• Set up Pastoral structure</li> <li>• Assign pupils to classes in promotion mapping</li> <li>• Admit new pupils</li> <li>• Record leavers and create CTF</li> <li>• Print class lists for new year</li> <li>• Attendance routines</li> <li>• Housekeeping routines</li> </ul> |
| <p>If you require assistance please contact<br/> LEAMIS Servicedesk <b>0116 231 1280</b> or Email: <b><a href="mailto:servicedesk@leamis.org.uk">servicedesk@leamis.org.uk</a></b></p> |   |

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**There are a number of procedures, which need to take place at the end of an Academic Year. Schools can start working through this booklet now.**

The procedures set out in the table below summarise the SIMS.net Pupil Database End of Year processes.

**IT IS CRITICAL THAT THE NEW ACADEMIC YEAR IS CREATED AND PROMOTION ROUTINES ARE RUN BEFORE THE END OF THE SUMMER HOLIDAYS**

- If you do not work during the summer holidays:  
You **MUST** complete these procedures **BEFORE** the end of the Summer Term.
- If you do work during the summer holidays:  
You **MUST** complete these procedures **BEFORE** the start of the Autumn Term (i.e. **BEFORE** your Teacher Training Days at the beginning of the Autumn Term).

It is advisable to start these processes as early as possible.

| <b>Routines to Process BEFORE the end of the Summer Term</b> | ✓ |
|--|---|
| Adding New Teaching staff in SIMS.net Personnel              |   |
| Create the new academic year                                 |   |
| Set up 2015/16 Pastoral Structure                            |   |
| Class names for 2015/16                                      |   |
| Pre-Admission Groups and Pupils                              |   |
| Record Leavers – Groups & Individuals                        |   |
| Export Common Transfer Files                                 |   |
| Set up Promotion Mapping for the new Academic Year           |   |
| Assign Pupils to Classes                                     |   |
| Print class lists for the new Academic Year                  |   |

| <b>Routines to Process at the beginning of the Autumn Term</b> | ✓ |
|--|---|
| Admit Pre-Admission pupils                                     |   |
| Re-admit pupils  |   |
| Print Official registers                                       |   |
| Housekeeping routines  |   |

## Access Permissions Required

Sims users carrying out the End of Year procedures will require the following permissions within SIMS:

- School Administrator
- Admissions Officer

Some of the procedures require **MANAGER** access rights as indicated in the instructions.

## Adding New Teaching Staff in SIMS.net Personnel

Ensure new staff are added in Personnel to enable their association with classes/registration groups. Employee details can only be entered into SIMS.net by a user who has access to the Personnel Officer Group.

Also ensure that leaving dates are entered for any teaching staff that have left the school.

## Checking if the New Academic Year has been created

It may be the case that the new academic year has already been created. To check if 2015/2016 has already been created:

Click on **Focus / School / Pastoral Structure / Next Academic Year Structure**

If the screen displays the **Next Academic Year Pastoral Structure** then 2015/2016 has already been created.

Click on **Close**

Go to the section **Check/Edit the Dates for the New Academic Year (page 6)**

If the message '**Academic Year not defined. Would you like to create an Academic Year?**' is displayed, 2015/2016 has not been created.

Click on **No** and **Close** the screen.

Complete the following section **Creating the New Academic Year**.

## Creating the New Academic Year

**Note: This process can take a long time to run depending on the size of your database. This process must not be terminated once started.**

The process can take up to 1 hour to complete.

Make sure you have your new academic year term dates to hand.

- Select **Routines / School / Academic Year** to open the Wizard
- Click on **Next**
- Check the days of the week are displayed, with AM & PM sessions ticked for Monday to Friday

- Click **Next**
- Click **Yes** to the message "**Are you sure the AM/PM sessions selected are correct?**"
- The School Terms and Holidays screen will be displayed
- Click in the **Term Start Date** box for the Autumn Term and enter the date the term starts using the calendar buttons or by typing in the date using the format dd/mm/yyyy **The start date MUST include Teacher Training days**
- Click in the **Term End Date** box and enter the date for the last day of the Term
- In the **Term Holiday** field check the correct holiday is displayed (see example screen shot below)
- Repeat for the Spring and Summer Terms

**NOTE:** Please note that the example term dates shown are those published for Leicestershire schools on the Leicestershire County Council web site. The term dates for individual schools and academies may differ. Please check your own school term dates before commencing.

**Edit Academic Year**

**Define the terms and term holidays for the academic year**  
Define the school terms start and end dates.

School Terms and Holidays

| School Term   | Term Start Date | Term End Date | Term Holiday      |
|---------------|-----------------|---------------|-------------------|
| Autumn Term   | 26/08/2015      | 18/12/2015    | Christmas Holiday |
| Spring Term   | 05/01/2016      | 24/03/2016    | Easter Holiday    |
| ▶ Summer Term | 11/04/2016      | 15/07/2016    | Summer Holiday    |

No errors detected. Press 'Next' to continue...

Add Term... Remove

Preview...

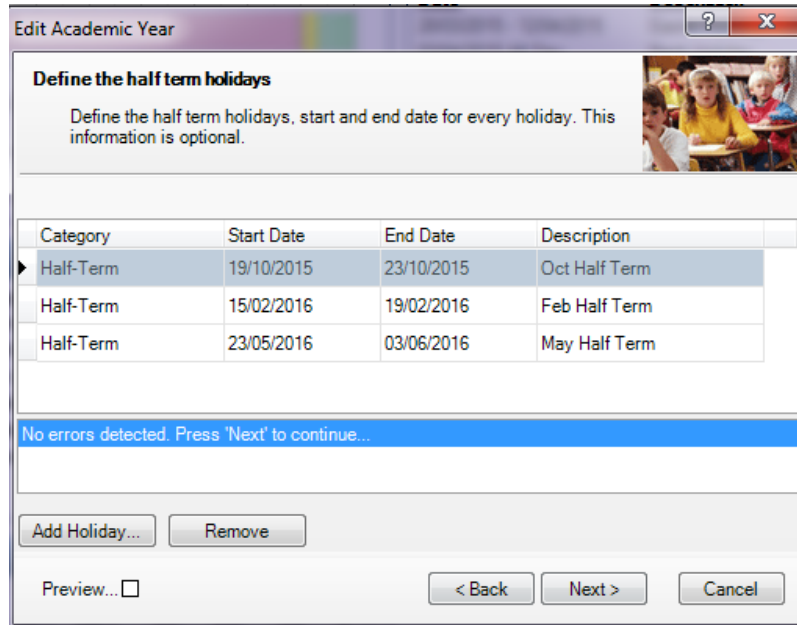
< Back Next > Cancel

**Note: CHECK THE DATES YOU HAVE ENTERED CAREFULLY**

The start date **MUST** include the Teacher Training days, for the majority of Leicestershire Schools this will be **26/08/2015**.

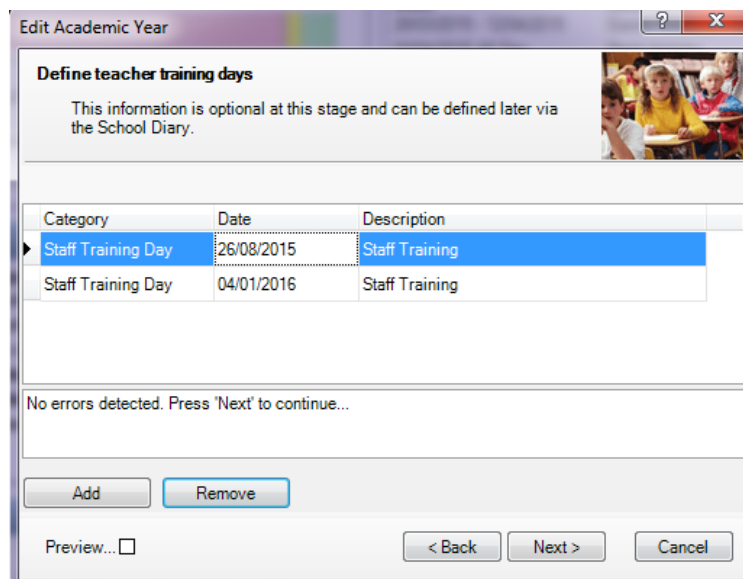
- Click on **Next** (if the Next button appears greyed out, move the cursor off the last Term End Date by pressing the Tab key)
- Click on the **Add Holiday** button and select the Category **Half-Term**
- Enter relevant **Start** and **End** dates using the calendar buttons or by typing in the dates. Enter a **Description** for example, Autumn Half Term
- Click on **OK**

- **Repeat** for the other half terms by clicking on **Add Holiday**, see example screen shot below.



**NOTE:** Please note that the example term dates shown are those published for Leicestershire schools on the Leicestershire County Council web site. The term dates for individual schools and academies may differ. Please check your own school term dates before commencing

- Click on **Next**
- Click on **Add** button and select the Category **Staff Training Day**
- Enter relevant **Start** date using the calendar buttons or by typing in the date. Enter a **Description**, for example, Teacher Training Day
- Click on **OK**
- **Repeat** for all Teacher Training Days, see screen shot below



- Click on **Next**
- Click on **Add Holiday** and enter the Category **Bank Holiday**, the relevant dates and description for August Bank Holiday- **31/08/2015** and **May Day - 02/05/2016**, see screen shot below
- 

| Category       | Date       | Description         |
|----------------|------------|---------------------|
| Public Holiday | 31/08/2015 | August Bank Holiday |
| Public Holiday | 02/05/2016 | May Day             |

- Click on **Next** to display the **Ready to create new academic year** window
- **Check very carefully** that the information is correct. The Back button can be used to return to any previous windows in order to correct any information
- Click the **Create** button  
You will receive a message informing you that '**This process will take some time to complete and should not be aborted once started. Do you wish to continue?**'
- Click **Yes** to continue

Progress will be displayed via a progress indicator at the bottom of the wizard

- Once complete, the wizard will display a message '**Academic Year was successfully created**'
- Click on **Close**

## Check/Edit the Dates for the New Academic Year

If date changes need to be made please complete the following:

- **Routines / School / Edit Academic Year**
- Check **Academic Year 2015/2016** is selected and click on **OK**
- Click on **Next**
- Use the guidance in the previous section **Creating the New Academic Year** to make any necessary alterations
- Click **Update** to complete the Wizard

## Setting Up 2015/16 Pastoral Structure

Before starting this process it will be necessary to have the following information to hand:

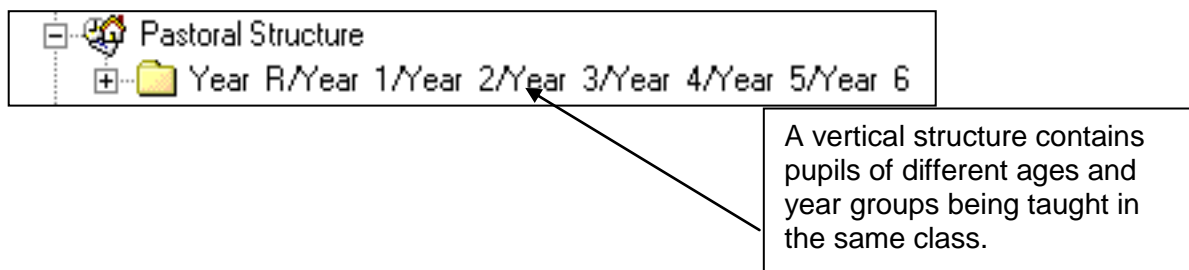
- Names of classes for 2015/16
- Planned structure of classes, for example, will there be any mixed year groups in any classes (vertical set up) or do all the classes have pupils in the same year group (horizontal set up)

Use the following instructions to check that your vertical or horizontal structure is correct for 2015/16. If the structure is incorrect please ring LEAMIS for advice.

**It is crucial that your pastoral structure reflects your school's setup as SIMS.net directly feeds into your chosen VLE/MLE.**

### A Vertical Pastoral Structure

**All** classes have mixed year groups.



### Checking a Vertical Structure:

- Select **Focus / School / Pastoral Structure / Next Academic Year Structure**.  
The effective date defaults to the start of the next academic year in this case 26/08/2015.
- Click on the **+** to the left of the heading **Pastoral Structure**
- Check the pastoral structure matches the screen shot above. If your pastoral structure is incorrect please telephone LEAMIS.
- Click on the **+** to the left of Year R/Year 1/Year 2/Year 3/Year 4/Year 5/Year 6
- **Right click** on the first year group. Click on **Properties** to check that the correct national curriculum year is displayed, if incorrect please contact Leamis.
- Click on **Cancel**
- **Repeat** for each year group

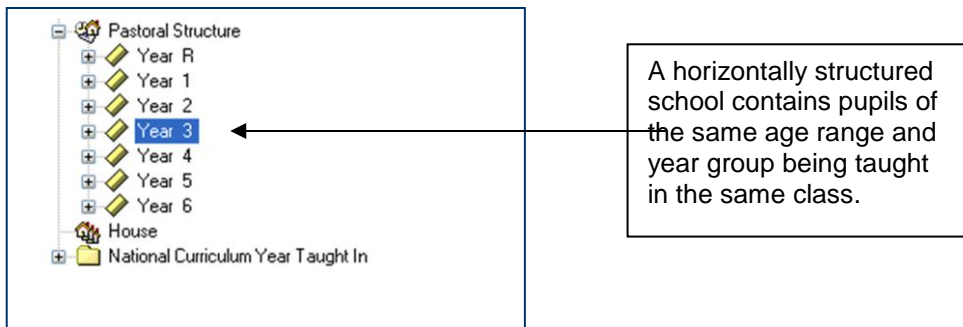
**Note:** If a Year group is listed more than once your structure will need to be modified. Please ring LEAMIS for advice.

**Note:** If your Year groups are listed in the wrong order, highlight the Year group that needs moving and use the green Up or Down Arrow buttons



## A Horizontal Structure –

Every pupil in each class is in the same year group



### Checking a Horizontal Structure:

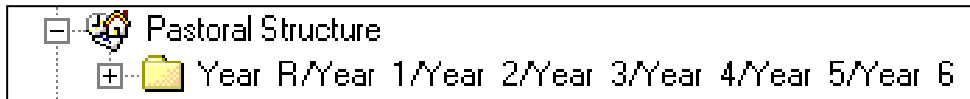
- Select **Focus / School / Pastoral Structure / Next Academic Year Structure**  
The effective date defaults to the start of the next academic year
- Click **+** to the left of the heading **Pastoral Structure**
- Check the pastoral structure matches the screen shot above. If your pastoral structure is incorrect please telephone LEAMIS
- **Right click** on the first year group. Click on **Properties** to check that the correct national curriculum year is displayed, if incorrect please contact Leamis.
- Click on **Cancel**
- **Repeat** for each year group

**Note:** If a Year group is listed more than once your structure will need to be modified. Please ring LEAMIS for advice.

**Note:** If your Year groups are listed in the wrong order, highlight the Year group that needs moving and use the green Up or Down Arrow buttons.

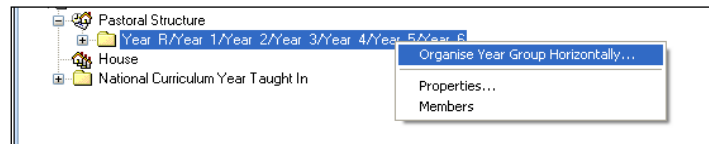
## Mixed Vertical/Horizontal set up

If you currently have a vertical structure (see example below)

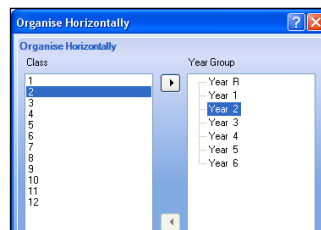



and are changing to a mixed structure e.g. Year R & Year 1 are mixed and the other classes have pupils in the same year groups :-

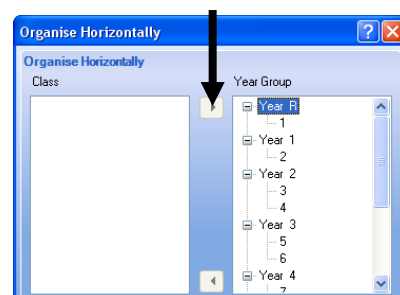
- **Right click** on the year group line. Click on **Organise Year Group Horizontally**



The following screen will be displayed listing your classes and Year groups

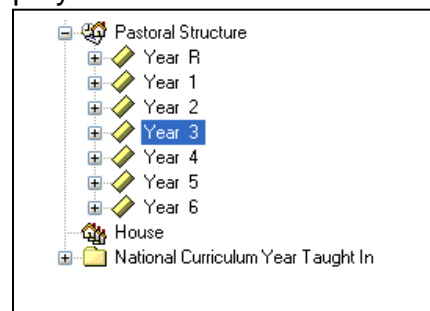


- Highlight the Class in the left pane and highlight its corresponding Year in the right pane and click the  button to create the association

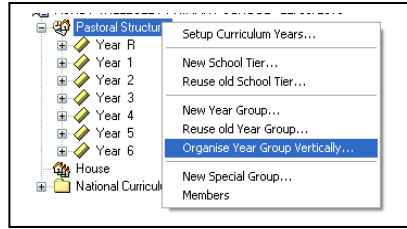


- Repeat for all Classes and Years
- When finished click **OK**

The screen now displays the Horizontal structure



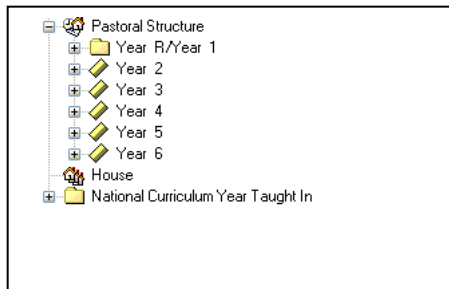
- Right click on Pastoral Structure and click on **Organise Year Group Vertically**



- Tick the Year groups to be organised Vertically e.g. Year R and Year 1 and click **OK**



The screen below displays Year R and Year 1 as Vertical and all other years are Horizontally organised.



- Click on **Save** when finished

**IF YOU REQUIRE ANY ASSISTANCE/GUIDANCE TO CHANGE YOUR STRUCTURE  
PLEASE TELEPHONE THE LEAMIS SERVICEDESK**

## Class Names for 2015/16

The naming of classes is entirely up to each school. Some schools may use teacher's initials, others may use a more generic name e.g. Class 1 or PINE.

If a class name changes, for example, a change in surname from 1CP to 1CM it is necessary to add a new class. You **MUST NOT** simply rename the class as this will affect the class name recorded in the pupil history. If you change the class name, the change will be made throughout the history of that class and the pupil will be recorded as always having been in the changed class name.

When you add a new class name you may have a message that it already exists and a prompt about using it again. Click **YES if it is not currently used**.

This section will include guidance on how to:

- View Existing Classes
- Add a New Class and Assign a Teacher
- Change a Class Teacher
- Change of Class Name
- Remove a Class
- Assign two Teachers to a Class

Work through the following guidance taking particular note of how to navigate depending whether you have a horizontal or vertical structure.

- Select **Focus / School / Pastoral Structure / Next Academic Year Structure**.

**IMPORTANT** – Check the Effective Date is for next academic year

### View/Add Classes and Assign Teacher - Horizontal Structure

If you do not know the class teachers at this point they can be assigned later

- Click on the **+** to the left of a **Year** group and then the **+** to the left of the **Registration Group** folder to view the class name(s)

#### Remove unwanted classes first:


- Navigate to the relevant class
- Right click on the unwanted class and click **Remove**
- Click **Yes** to the message '**Selected Group will be deleted**'
- **Repeat** until all unwanted classes have been removed

#### Add a New Class:

- Navigate to the relevant Year by clicking on **+** to the left of Year to view the Registration Group folder and then the **+** to the left of **Registration Group** to view the class name(s)
- Right click on the **Registration Group** folder
- Click **New Registration Group**

- Enter a **Short Name** and **Full Name** (these may be identical)
- Select the **Registration Tutor** Browse. Type in the surname of the teacher and click on **Search**. Highlight the teacher and click **OK**  
Click on **OK** again
- **Repeat** the above until you have added all your new classes
- Click on **Save**

### Assign two Teachers to a Class

- Assign the first teacher as the Registration Tutor  
(Refer to the guidance above under 'View/Add Classes')
- **Navigate** to the relevant Class
- Right click on the class name and click **Properties**
- Click on the **Add a New Supervisor** button (on the right hand side) 
- Select the **Role Joint Main Supervisor**
- Click on the browse button, type in the surname of the teacher and click on **Search**. Highlight the teacher and click on **OK**
- Click on **OK** twice
- Click on **Save**

### View/Add Classes and Assign Teacher - Vertical Structure

If you do not know the class teachers at this point they can be assigned later

Click on **+** to the left of the **Year** Groups to view the **Registration Group** folder. This folder will appear at the end of the Year Groups.

- Click on **+** to the left of **Registration Group** to view the class names

### Remove unwanted classes first:

- Navigate to the relevant class (use guidance above)
- Right click on the unwanted class and select **Remove**
- Select **Yes** to the message 'Selected Group will be deleted'
- **Repeat** until all unwanted classes have been removed

### Add a New Class

- Right click on the **Registration Group** folder
- Click **New Registration Group**
- Enter a **Short Name** and **Full Name** (these may be the same)
- Select the **Registration Tutor** Browse. Type in the surname of the teacher and click on **Search**. Highlight the teacher and click on **OK**
- Click on **OK** again (can assign Teacher at a later date)
- **Repeat** the above until you have added all your new classes
- Click on **Save**

### Assign two Teachers to a Class

- Assign the first teacher as the Registration Tutor  
(Refer to the guidance above under 'View/Add Classes')
- **Navigate** to the relevant Class

- Right click on the class name and click **Properties**
- Click on the **Add a New Supervisor** button (on the right hand side)
- Select the **Role Joint Main Supervisor**
- Click on the browse button, type in the surname of the teacher and click on **Search**. Highlight the teacher and click on **OK**
- Click on **OK** twice
- Click on **Save**



#### **Remove a class teacher**

- Navigate to the relevant class (use guidance above)
- Right click on the class name
- Click **Properties**
- Click on the **Remove Main Supervisor** button at the end of the Registration Tutor box to remove the teacher, Click on **OK**
- Click on **Close** when finished



## Pre-Admission Group(s) and Pupils

It is essential that an **Intake** group has been set up in your system for the forthcoming academic year.

Schools may already have imported their new students via the ATF (Admissions Transfer File). Additional students can be added manually or by importing a Common Transfer File (CTF).

Pupils can be added manually or by importing a Common Transfer File (CTF).

It is essential that an **Intake** group has been set up in your system for the forthcoming academic year.

If you have a staggered intake, you must have an **Admission** group for each intake.

If pupils are being admitted into different year groups there must be an **Intake** group for each of these year groups.

If you do not have a Pre-Admission group already setup, please follow the instructions 'Adding New Intake and Admissions Groups' below.

**Note:** The date of admission must be the day the children will actually arrive in school - **NOT A TEACHER TRAINING DAY.**

## Adding New Intake and Admissions Groups

Please check:

- **Routines/Admission/Admission Groups/Setup**
- Click on **Search**
- **Check** that the Intake Group for 2015/2016 has already been created and **Close**

If the group **IS** present please proceed to the next section '**Recording Leavers**'.

If the group is **NOT** present please follow the instructions below.

### 1 Intake Group

- Go to **Routines/Admission/Admission Groups/Setup**. Click **New**
- Check the **Admission Year** is correct. This would be 2015/2016 for pupils starting in the Autumn Term 2015
- Select the relevant **Admission Season**. This would be **Autumn** for pupils starting in August/September 2015
- Select the relevant **Year Group**
- Enter the **number of pupils** you are expecting against **Planned Admission**
- Click into the **Name** box. The system enters a default name, for example, **2015/2016 – Autumn Year R**. It is recommended this is **NOT** changed.
- Check there is a **tick** in the **Active** box

## 2 Admission Group

- Click into the **Name** box. The system should enter a default name, for example, 2015/2016 – Autumn Year R(A). It is recommended this is **NOT** changed. If it does not automatically populate this field type in 2015/2016 – Autumn Year X(A), where X is the year the pupils will be entering.
- Enter the **Date of Admission** using the Calendar button or by typing directly into the box

**Note:** The start date should be the date that the pupils actually arrive in school **NOT** a teacher day. (Please check carefully your own schools start date).

- Click **Save**

If your school has staggered start dates, create separate Intake Groups for each start date by repeating the instructions above from '1 Intake Group' page 14.

Where pupils are being admitted to different Year Groups it is necessary to add a new **Intake Group** for each Year by completing **all** the instructions above from 1 Intake Group' page 14.

## Recording Leavers – Groups & Individuals

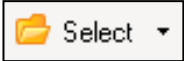
Do **NOT** use the 11School History panel in individual pupils record to record leaving details.

The date of leaving will generally be the last day of term (10/7/2015).

Dates of leaving should be entered before the final CTF (including Key Stage Results) is sent to the destination school. As the last week of term is always very busy this could be completed at the beginning of the Summer holiday.

### Groups of Leavers:

First deal with the majority of pupils who have the same destination details.

- Select **Routines / Pupil / Leavers**
- Select the appropriate **Year Group** and click **Search**
- Click on the down-arrow to the right of the yellow **Select** button 
- Select **All**
- Enter the **Date of Leaving, Reason** and **Destination**.
- For Year 6 moving to Secondary the Reason would be 'End of phase transfer – Maintained school'.
- Enter a **Destination**. Please give the most accurate information as possible. In most cases this will be the name of the secondary school. If the pupil is going abroad give the country if known. If you do not know where the pupil is going enter 'Unknown'.

### Selecting students



If **ALL** pupils have the same destination details click on the **Assign to All**.

In a number of cases the majority of pupils (but not All) will be going to the same destination in which case it is more efficient to select all the pupils and then de-select individuals.

**Select all students:**

- Select the first pupil in the list
- Scroll to the bottom of the list
- Hold down the **Shift** key
- Select the last pupil in the list

**De-select individual students:**

- Hold down the **Ctrl** key as you click on the pupils to be de-selected
- Click on the button **Assign to Selected**

**If a pupil has had a Date of Leaving assigned incorrectly:**

- Select the required pupil
- Click on the **Clear** button and **OK** the message

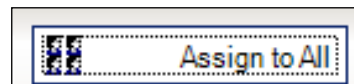
**For the pupils that are left unassigned:**

- Edit the Leaving Information
- Select the pupil(s) for the next Destination
- (Use the **Ctrl** key while selecting if more than one pupil)
- Click on the button **Assign to Selected**
- Repeat this until all pupil's leaving information has been entered
- Click **Save** and **Yes** to the prompt
- This may take a few moments to save as Attendance records are being updated
- Click on **Close**

## Individual Leavers:

This method **MUST** be used for Individual leavers. Do **NOT** use the **11School History** panel in individual pupils record to record leaving details.

- Select **Routines / Pupil / Leavers**
- Enter the individual pupil name in the **Surname** field and click **Search**
- Double click on the required pupil
- Enter the **Date of Leaving** and **Reason** for leaving
- Enter a **Destination**. Please give the most accurate information as possible. For Primary schools this will be the name of the High school. If the pupil is going abroad give the country if known. If you do not know where the pupil is going enter 'Unknown'.
- Click on the **Assign to All** button
- Click on **Save**.



This process can be repeated for individual pupils leaving for different destinations.

**Pupil information will remain on your system as Current until the day after the Leaving date when their details can be viewed from 'Leavers'.**

## Exporting Common Transfer Files (CTF)

This is part of the statutory transfer of results process when the end of key stage results have been entered in Assessment Manager and the Attendance for the year is up to date at the end of the summer term.

**Check that the destination school is on your system:**

- Select **Tools / Other Schools**
- Click on **Search**

If the School **IS** correctly listed close this screen

If the school is **NOT** on your system add as follows:

- Select **Tools / Other Schools**
- Click on **New**
- Type in the **School Name**
- Select the **LA** browser. Type in the name of the LA. Click on **Search**. Highlight the LA and click **OK**
- Type in the school **Establishment Number**
- Tick in the **Destination** box on the right
- Click on **Save**
- Click on **Close**

**Export the Common Transfer File:**

- Select **Routines / Data Out / CTF / Export CTF**
- Select **General**, click on **Select**
- Check that all check boxes are selected in the **1 Data to be Exported** panel. Do Not tick **Include KS1 Tasks/Tests**
- Click on the drop down arrow to the right of the **View** box under **2 Student Options** and select the relevant status of the pupils to be included in the CTF file, for example, Current, Leavers this year etc

**Note:** If you have assigned a leaving date to the pupil's record they are not regarded as leavers until after their leaving date

- To limit the list of students, click on the down arrow to the right of **Year** in the column header. Choose the relevant year from the drop down list.

| UPI#           | Preferred Surname | Preferred Forename | Reg.   | Year       | Year T. | Destination LA/Other | Destination School |
|----------------|-------------------|--------------------|--------|------------|---------|----------------------|--------------------|
| J8952002030003 | Barrowcliffe      | Lucy               | 4CH    | [All]      | 6       |                      |                    |
| N8953056080001 | Blake             | Jasmine            | 1RH/LP | [Custom]   | 6       |                      |                    |
| C8953056080002 | Burrows           | Milly              | 1RH/LP | [Blank]    | 6       |                      |                    |
| R8953056080003 | Chapman-Smith     | Taffy              | 1RH/LP | [NotBlank] | 6       |                      |                    |
| F8953056080004 | Collins           | Lewis              | 1RH/LP | 2          | 6       |                      |                    |
| V8953056080005 | Davies            | Mary               | 1RH/LP | 4          | 6       |                      |                    |
| V895228304002  | Dery              | Spencer            | 3M/0D  | 6          | 6       |                      |                    |
| K8953030400001 | DILKES            | Chloe              | 4CH    | 6          | 6       |                      |                    |
| J8953056080006 | Edwards           | Emily              | 1RH/LP | R          | 6       |                      |                    |
| Y8953056020001 | EDWARDS           | Izzie              | 4CH    | 6          | 6       |                      |                    |
| M895305602000  | EGAN              | Bohany             | 4CH    | 6          | 6       |                      |                    |
| A895305602007  | FOOTE             | Kieran             | 4CH    | 6          | 6       |                      |                    |
| Y8953056080007 | Goodman           | Harry              | 1RH/LP | R          | 6       |                      |                    |
| B895305602003  | HOPE              | Alex               | 4CH    | 6          | 6       |                      |                    |
| M895305608000  | Ingram            | Toby               | 1RH/LP | R          | 6       |                      |                    |
| A895305602012  | JELLEY            | Dean               | 4CH    | 6          | 6       |                      |                    |

- If required pupils are not listed tick the check box to **Include students already exported** and click the **Refresh Students** button to update the list of pupils displayed
- **Select the pupils** who are going to the same destination using the Shift and/or Ctrl keys as described in a previous section 'Recording Leavers' or hold down the Control key and single-click each pupil.
- **Release** the Ctrl Key or Shift Key
- **Check** the list of pupils
- Holding the **Ctrl Key** click once in the **Destination School** column for one of the selected pupils
- .Click on the drop down arrow to the right of the cell.
- Select the required **Destination School**. This is then placed in the Destination School column for all the selected pupils.
- Repeat these steps for other groups of pupils/destination schools

**NOTE:** From a data security point of view it is important to ensure that the correct pupils are selected for each destination to avoid pupil's details being sent to an incorrect school.

Use the fictitious school **UNKNOWN DESTINATION (Code XXXXXXXX)** for pupils with an unknown destination and **INDEPEND/OUT OF ENGLAND (Code MMMMMMMM)** for pupils going to Independent Schools or outside England. If these fictitious schools are not on your system they can be added through **Tools /Setups/CTF**, Tab 4 - **Alternative Destinations**.

- Click the yellow **Export CTF** button to create the export files
- Click on **OK** when the export completes
- Optional – to view the Export History Log through **Routines / Data Out / CTF / View Export History Log**
- Use S2S to send CTF files to receiving schools.

## Setting up the Promotion Mapping for the New Academic Year

Setting up the promotion paths for the pastoral structure plays a key part in the end of year procedures and ensures that pupils move from their current year/class into their correct year/class in the new academic year.

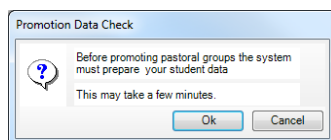
Setting the promotion mapping can be carried out at any point as the promotion itself occurs at the beginning of the next academic year. This means that on the first day of term all the pupils will automatically be moved into their New Year and class.

**THIS MUST BE DONE BEFORE THE START OF THE NEW ACADEMIC YEAR**

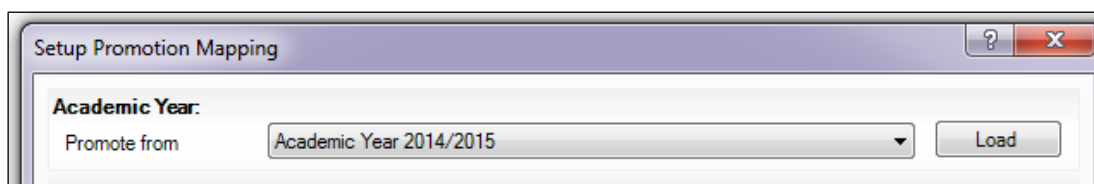
- Select Routines / School / Promotion

**Note: This process can take a long time to run depending on the size of your database. This process must not be terminated once started.**

- Click on **OK** to run the **Promotion Data Check**



- When completed the **Setup Promotion Mapping** window will be displayed
- Check that **Academic Year 2014/2015** is in the **Promote from** box. If not select from the drop-down arrow
- Click on **Load**



## Year Group Promotion:

This is already set up and should be correct (see screen shot below)

Setup Promotion Mapping from Academic Year 2014/2015

Academic Year:  
Promote from: Academic Year 2014/2015 [Load]

Year Group

| Year Group | Promotion Path |
|------------|----------------|
| N2         | R              |
| R          | 1              |
| 1          | 2              |
| 2          | 3              |
| 3          | 4              |

Override membership  [Set Default]

Class

| Year         | Registration Group | Promotion Path | Registration Tutor   | Promote Registration Tutor          | Promote Other Supervisors           |
|--------------|--------------------|----------------|----------------------|-------------------------------------|-------------------------------------|
| Year N2      | PM                 |                | Ms Lisa Lawson       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Year N2      | AM                 |                | Mrs Rebecca Lorrin   | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Year R/Yea.. | ELM                | 2JB            | Mr Richard Perrin    | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Year R/Yea.. | PINE               | 2GH            | Mr Oliver Joyner     | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Year R/Yea.. | ASH                | 2JB            | Miss Amelia Kent     | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Year R/Yea.. | OAK                | 2GH            | Miss Shirley Fortune | <input type="checkbox"/>            | <input type="checkbox"/>            |

Override membership  [Finish]

Tick the **Override membership** box in the **Year Group** section the **first time** you carry out the Promotion Mapping process (if this process is repeated do **NOT** tick this box again as it will override any manual edits)

## Whole Class Promotion:

This should only be used when the **whole** of one class moves to another class.

- The Registration Group column shows the registration groups for 2014/15. The Promotion Path column shows the registration groups for 2015/16. Highlight one class at a time in the **Registration Group** column then select the class the children will be promoted to from the **Promotion Path** column drop-down list
- If the class teacher is listed and moving up with the class tick the **Promote Registration Tutor** box.
- If other Supervisors are moving up with the class tick the **Promote Other Supervisors** box.
- **Repeat** for any relevant classes
- **Override membership** boxes should be ticked the **first time** you carry out the Promotion Mapping process (if this process is repeated do **NOT** tick this box again as it will override any manual edits)

**Note:** If this process is repeated with these boxes ticked again any manual edits to class memberships made in the Pastoral structure will be lost.

- Click the **Finish** button. The system will show the **Promote Pastoral Groups** window. This displays the current year groups down the left hand side.

| Promote pastoral groups   |         |                    |                 |                            |                         |
|---|---------|--------------------|-----------------|----------------------------|-------------------------|
| <span>Save</span>   <span>Map</span>   <span>Filter</span>   <span>Customize</span> ▾ |         |                    |                 |                            |                         |
| Name  | Unusual | Current Year Group | Next Year Group | Current Registration Group | Next Registration Group |
| Current Year Group: R   |         |                    |                 |                            |                         |
| Current Year Group: 1   |         |                    |                 |                            |                         |
| Current Year Group: 2   |         |                    |                 |                            |                         |
| Current Year Group: 3   |         |                    |                 |                            |                         |
| Current Year Group: 4   |         |                    |                 |                            |                         |

If the whole class is **NOT** moving to a new class together there are two ways of proceeding.

To decide which would be your best route read the two options below.

- Option 1:** If you only have a small number of classes the process of assigning pupils to classes can be completed in the Pastoral structure if preferred – see following section ‘Assigning Pupils to Classes in the Pastoral Structure’ on Page 23. If you decide to progress with this option click on **Save** and **Close**.

**Option 2:** If you have a larger number of classes (more than 15) it is recommended that you use the guidance below to assign next year's classes and make any later adjustment using the Pastoral Structure procedure below. If you decide to progress with this option complete the instructions below.

- Double click on the first Year Group (Year R for most schools)

| Name                   | Unusual                             | Current Year Group | Next Year Group | Current Registration Group | Next Registration Group |
|------------------------|-------------------------------------|--------------------|-----------------|----------------------------|-------------------------|
| Current Year Group: N2 |                                     |                    |                 |                            |                         |
| Current Year Group: R  |                                     |                    |                 |                            |                         |
| Ackton, Stan           | <input checked="" type="checkbox"/> | R                  | 1               | ASH                        | OAK                     |
| Affleck, Alexis        | <input checked="" type="checkbox"/> | R                  | 1               | PINE                       | OAK                     |
| Aloia, Paolo           | <input checked="" type="checkbox"/> | R                  | 1               | ASH                        | ELM                     |
| Bagnall, Keith         | <input type="checkbox"/>            | R                  | 1               | OAK                        | OAK                     |
| Barr, Wendy            | <input checked="" type="checkbox"/> | R                  | 1               | ASH                        | ELM                     |
| Chang, Xhang           | <input type="checkbox"/>            | R                  | 1               | PINE                       | PINE                    |
| Channing, Herbie       | <input checked="" type="checkbox"/> | R                  | 1               | OAK                        | ASH                     |
| Cox, Toby              | <input checked="" type="checkbox"/> | R                  | 1               | ELM                        | PINE                    |
| Emerston, Sam          | <input type="checkbox"/>            | R                  | 1               | ASH                        | ASH                     |
| Foss, Cameron          | <input type="checkbox"/>            | R                  | 1               | PINE                       | PINE                    |

Edit the column Next Registration Group (last column) to assign each pupil to the correct class for next year using the procedures described below:

- If the pupils in a year group are in more than one class, the pupils can be sorted by current class that will make the editing process easier:

Click on the down arrow to the right of the **Customize** button, select **Sort**  
 Under **Sort Students by** select **Current Registration Group**  
 Under **Then by** select **Name**  
 Click on **OK**  
**Double click** on this year group again – the pupils will now be sorted

Pupils can be assigned classes for next year on block or individually

#### To assign next year's class on an individual basis:

- Click in the **Next Registration Group** column for the pupil and select the class for next year

#### To assign next year's classes on block:

- Use the **Ctrl** and/or **Shift** keys to select the pupils who are moving to the same class
- **Release** the Ctrl or Shift key
- Click in the **Next registration Group** column for the last pupil in the selected list and select the class for next year
- All pupils in the highlighted list should now be assigned this class

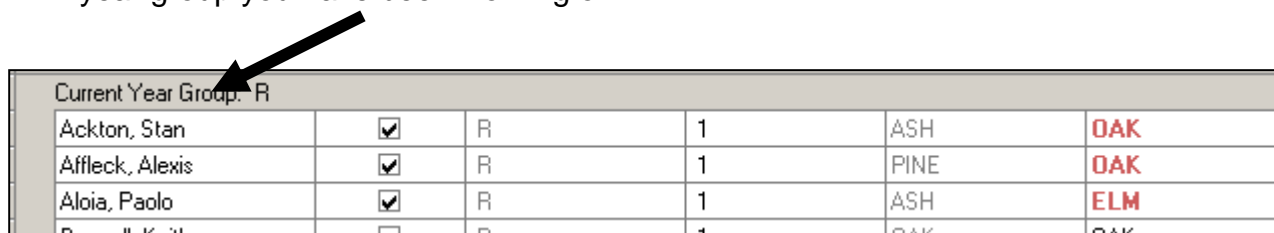
## To change next Year's Year Group for an individual

- The Filter button is ON by default. Click on the **Filter** button to turn it OFF.
- Click in the **Next Year Group** column for the required pupil and select the Year Group for next year

## Repeat for each Year group

When a year group is completed select the next year group as follows:

- Double click on the Heading **Current Year Group** on the shaded grey line to close the year group you have been working on



| Current Year Group: R |                                     |   |   |      |     |  |
|-----------------------|-------------------------------------|---|---|------|-----|--|
| Ackton, Stan          | <input checked="" type="checkbox"/> | R | 1 | ASH  | OAK |  |
| Affleck, Alexis       | <input checked="" type="checkbox"/> | R | 1 | PINE | OAK |  |
| Aloia, Paolo          | <input checked="" type="checkbox"/> | R | 1 | ASH  | ELM |  |
| Beasall, Keith        | <input type="checkbox"/>            | R | 1 | OAK  | OAK |  |

- **Double click** on the next Year Group
- When completed click **Save**
- A warning message may be displayed "**One or more students contain unusual values for next groups. Do you wish to continue?**" Click **Yes**
- Click on **Close**


## Assigning Pupils to Classes in Pastoral Structure

Use the following procedure to assign pupils to classes ready for the new academic year.

Before starting Globally Accept or Withdraw pupils in the Pre-Admissions Group(s) to ensure that all pupils who are withdrawn are excluded from the list when assigning to classes.

- Select **Routines / Admission / Accept Applications**
- Make the following selections:
  - **Admission Season** – Autumn
  - **Admission Year** – 2015/2016
  - The relevant **Year Group**
- Click on **Search**
- Double click on the relevant **Admission Group**
- Under Current Application Status select **Applied**
- Click in the Accepted Column to change the Application Status to **Accepted** – this needs to be completed on an individual basis. It is not necessary to use the Application Status Offered.
- If the pupil is not starting at your school place a tick in the **Withdrawal** column.
- Click on the **Save** button
- Click on **Close**



- Select **Focus / School / Pastoral Structure / Next Academic Year Structure**
- Change the **Effective Date** to the first day the students will actually be in school, (**NOT the Teacher day**). Click **Go**. Click **Ok** to ignore the warning.
- Expand the Pastoral Structure to view the **Registration Groups** yellow folder
- Right click on **Registration Group** yellow folder and select **Members**
- If required to sort the columns right click on the column heading Year Group, click on **Sort By**
- **Maximise** the window by clicking on Maximise button, top right hand corner 
- Pupils can be assigned to classes by ticking the appropriate column
- Pre-admission pupils with Accepted status are highlighted in 'pink/salmon' shading.
- Pre-admission pupils with Offered or Applied Status are highlighted in 'tan' shading. Pre admission pupils with Withdrawn status are not shown in this list. The tick boxes at the top can be used to filter this list
- The **Totals** are shown at the bottom of the columns. The totals can be split by gender by clicking on the down arrow to the right of the **Actions** button and selecting **View Triple**
- Click on **OK**
- Click **Close** when finished

**Note:** The above routine can be repeated as many times as necessary until all pupils have been allocated to a class for next year.

## Printing Class Lists for the New Academic Year

These reports only show pupils who have been Accepted.

### Reports / Run Report

Click on the **+** to the left of **Focus**  
Select the yellow folder for **Student**

Select from the following reports:

- Registration Groups (Dated)
- Registration Group (Dated – DOB Sort)
- Registration Group (Dated – Gender Sort)
- Registration Group (Dated – with columns)

**NOTE – If the new class names are not being picked up you may need to logout and login again to refresh the list.**

- Remove the tick from **Bypass effective date** to enable the Effective Date to be changed. Edit the **Effective Date** to be within the Autumn Term, and on or after the date the pupils are due to start.

**Note:** New teachers will not show at the top of the report until the member of staff is current.

## Setting the New Academic Year

### Set the New Academic Year as the Current Year

- Select **Tools / Academic Management / Set Academic Year**
- Highlight **Academic Year 2015/2016** in the list
- Click **OK**
- Click **OK**.

#### **IMPORTANT**

**NOTE:** This process needs to be carried out on all workstations.

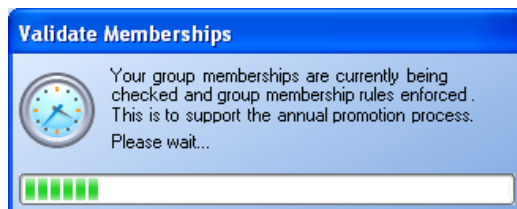
## Running Validate Memberships routine

After completing the above processes it is essential to run the **Validate Memberships** routine.

The **Validate Memberships** routine checks any changes that have been made to group memberships or other data that affects the group membership rules within SIMS.

- In SIMS, select **Tools | Validate Memberships** to run the validation process
- A reminder will appear notifying the last time this routine was performed and the time it took.
- Click **OK** to continue

The following dialogue box will be displayed whilst the process is being run.



When the dialogue box disappears, the routine is complete.

## Attendance

### Print Registration Sheets for the First Week of Term (if required)

- Select **Routines / Attendance / OMR Entry / Print OMR Registration Sheets**  
OR
- Select **Reports / Attendance / Manual Entry / Print Registration Sheet**
- Set the **Date Range** from the Monday for the first week of term to the Monday for the first week of term (for Leicestershire schools this will be W/b 24/08/2015 to W/b 24/08/2015)
- Change Group Type to **Reg Group**
- **Highlight** the required Reg Groups or click on **Select All**

- Tick the box to **Include Accepted Applicants**
- Click on the **Print** button
- Click **OK** to print

## On the First Day of Term in the New Academic Year.

|  |
|--|
| <b>IMPORTANT:-</b> Students should only be admitted when you are <b>certain</b> that they will be attending your school. These students should have entered the school for registration. |
|--|

### Admit Pre-Admission Pupils

Pupils should only be admitted when you are certain that they will be attending your school.

### Admitting Pupils

- Select **Routines / Admission / Admit Applications**
- Make the following selections:
  - Admission Season** – Autumn
  - Admission Year** – 2015/2016
  - The relevant **Year Group**
- Click on **Search**
- Double click on the **Admission Group**

The Application Status defaults to **Accepted**

|  |
|--|
| <b>NOTE:</b> Please <b>DO NOT</b> issue a Permanent UPN until pupil(s) actually arrive at the school |
|--|

### Assigning a UPN

**Tip:** The screen is not wide enough to show all available columns but this can be rectified by removing the Launcher bar on the left hand side. Click on the double green arrow button to **Hide** or **Show** the **Launcher** panel.

Permanent UPNs should only be issued to pupils when it is believed that they have never been allocated a UPN. You may need to edit the **Assign UPN** field to Assign Temporary UPN or No Change if you are not sure whether your school is responsible for issuing a Permanent UPN. If this is the case click in this column for individual pupils and use the drop-down arrow to edit where necessary. To make use of the bulk UPN allocation functionality on this screen you must do this now. After this process it is only possible to issue UPNs on an individual basis.

- Click on **Admit All** button. This places a tick in the blue column **Admitted** (right hand side)
- If you are unsure about admitting any of the pupils the tick can be removed from the Admitted column

- Click in the green **Withdrawal** column to withdraw any pupils from the Admission Group
- Click on the **Save** button. The panel will refresh and just show pupils who are not yet admitted.

## Re-admitting Pupils

Any pupil, who left your school and then subsequently returned, must be re-admitted rather than added to the system again. This ensures that the pupil's History is maintained on your database.

**(Do NOT remove the Date of Leaving as a method of re-admitting)**

- Select **Focus / Pupil / Pupil Details** (or click on the Pupil Details button)
- Click on **New**
- Enter the basic details and click the **Continue** button. A list of Matched People will be displayed
- Highlight the relevant pupil (ensure the Role is **Student** not **Contact** etc) and click the **Open** button. Click **Yes** to the prompt *'The selected student is a Leaver, Do you want to re-admit the student'*
- Complete mandatory (red) fields and update any information such as the address, as necessary
- Click on **Save**

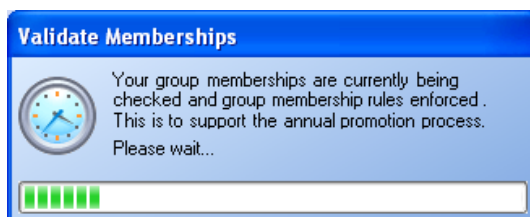
## Running Validate Memberships routine

After completing the above processes it is essential to run the **Validate Memberships** routine.

The **Validate Memberships** routine checks any changes that have been made to group memberships or other data that affects the group membership rules within SIMS.

- Select **Tools | Validate Memberships** to run the validation process
- A reminder will appear notifying the last time this routine was performed and the time it took.
- Click **OK** to continue

The following dialogue box will be displayed whilst the process is being run.



When the dialogue box disappears, the routine is complete.

## Attendance – Print Official Registers for July

Before printing it will be necessary to deal with missing marks for absence and unexplained absences.

- Select **Reports / Attendance / Selected Student Reports / Missing Session Marks Report**
- Specify the required **Date Range**
- Select the required **Group Type**, click **Search**
- Select the required Groups and **Print**
- Click **OK** to print the report

To manually process any missing marks:

- Select **Focus / Attendance / Deal with Missing Marks**
- Set the **Date Range** and select the **Group Type**, click **Search**
- Select the Group
- Click **Open** and enter marks
- Click **Save** when complete

To manually process any unexplained absences:

- Select **Focus / Attendance / Deal with Unexplained Absences**
- Set the **Date Range** and select the **Group Type**, click **Search**
- Select the Group
- Click **Open** and enter marks
- Click **Save** when complete

To print the Official Registers:

- Select **Reports / Attendance / Whole Group Pupil Reports / Official Register Report**
- Specify the required **Date Range** and **Group Type**
- Select the required Groups, click **Search**
- Select the required Groups and click on **Print**
- Click **OK** to print the report

**Check all Official Registers are complete for Academic Year 2014/2015**

## Housekeeping Routines in SIMS.net

Housekeeping Routines are optional, however, we strongly recommend that they are carried out early in the new academic year.

### Update Parental Salutation and Addresses:

- Select **Routines / Pupil / Update Parental Salutation/Addressee/Parental**
- Select the required Year Group and/or Class and click on Search
- Click on the drop down arrow to the left of the **Select** button (shown by a yellow folder)  
Click on **All** to select all the pupils  
This moves the pupils to the panel **3 Students**.
- Tick the required boxes under **1 Options** and **2 Overwrite Options**
- Click on the **Generate** button
- Click on **Save**

### General Housekeeping:

- Select **Tools / Housekeeping / General**  
The options are **Name Format, Reset Parental Ballot Flags & Update Mailing Point**  
Select your required options, click **Apply** in the relevant panels  
**Close** when complete

### Deleting Unlinked Contacts:

- Select **Tools / Housekeeping / Delete unlinked contacts**
- Click **Search**. This will list all Contacts who are no longer attached to students at school
- Click on the drop down arrow to the left of the **Select** button (shown by a yellow folder)
- Click on **All** to select all the contacts
- This moves the Contacts to the **Contacts to be Deleted** panel
- Click **Delete**,
- Click **Yes**, when prompted to delete the unlinked contacts

Any other Housekeeping Routines listed in the menu e.g. Bulk Address Tools, Document Manager Server and Archive Attendance Marks, should not be undertaken yet. These are for future consideration and detailed instructions will be distributed then.