

SIMS



Extended Reporting

Microsoft® and Windows® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

© Capita Business Services Ltd 2020. All rights reserved.

No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated or transmitted without the express written consent of the publisher.

Capita SIMS, Franklin Court,
Priory Business Park, Cardington, Bedford, MK44 3JZ
Tel: 01234 838080 Fax: 01234 832082 <http://www.capita-sims.co.uk>

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

Version	Change Description	Date
7.182 – 9.0	Updated to 7.182	09/07/2018
7.188 – 10.0	Updated to 7.188	12/08/2019
7.188 – 10.1	Minor edits	21/10/2019
7.188 – 10.2	Spelling edits	16/01/2020

This booklet is designed for use with SIMS software version 7.188

Mimeo Print code: EXREP-1-v10.2

Extended Reporting

Contents

Introduction	1
Introduction	1
Course Objectives	1
Overview	1
Course Requirements	2
Activity – How Well Do You Know Reporting?	2
01. User Templates in Word Lists	3
Chapter Introduction	3
Scenario – Request to Set Up a Template	3
Step by Step – Creating a Template	3
Scenario – Address Report	6
Step by Step – Reusing a Template	6
Scenario – Template with Columns	8
Step by Step – Creating a Template with Columns	8
02. Creating Reports Using Combinations of And/Or Clauses	11
Chapter Introduction	11
Scenario – School Trip List	11
Step by Step – Creating a Report with Dietary Needs and Medical Conditions	11
Activity – Postcode Report	14
03. Sub-Reports	15
Chapter Introduction	15
Scenario – Request for List of Pupils with Contacts	15
Step by Step – Emergency Contact Report	15
Scenario – Behaviour Report	22
Step by Step – Producing a Behaviour Report	22
Activity – Request for SEN Review Information	25
Activity – Request for Pupil Premium Information	25
04. Rich Text Format	27
Chapter Introduction	27
Scenario – Registration Group Lists per Page	28
Step by Step – Using RTF to Specify a Page Break	28
Scenario – Request for Letters to Update Contact Information	30
Step by Step – Multiple Records (One-to-Many Relationships)	30
Scenario – Setting up Templates with Columns in Place	35
Step by Step – Create a RTF Template with Three Columns	35
Scenario – Editing the Data Collection Sheet	39
Logical Fields	40
Formatting Dates	40
Step by Step – Editing a RTF Design Report	40
Scenario – Creating a Photo Pass	42
Using Photos in a RTF Report	42
Step by Step – Creating a RTF Design	42
Scenario – Lists of Classes per Pupil for Parents' Evening (Secondary Only)	44
Step by Step – Student Class Lists for a Subject	44
Activity – Grouping Fields per Page	45
Activity – Creating a Letter Listing Behaviour Incidents	45
05. Report Inserts	47
Chapter Introduction	47
Scenario – Individual Conduct Report	47
Inserted Report	48
Step by Step – Creating the First Report	48
Step by Step – Creating the Second Report	50
06. Reporting on User Defined Groups	53
Chapter Introduction	53
Scenario – Creating the Group	53
Step by Step – Creating the Group	53
Step by Step – Creating the User Defined Group Report	55
07. Staff List Reports	59
Chapter Introduction	59
Scenario – Monitoring Staff Absences	59
Step by Step – Staff Absences Report	59

08. Sub Report Count and Excel	61
Chapter Introduction.....	61
Scenario – Highlighting/Filtering of Late Marks.....	61
Step by Step – Creating a Late Mark Report	61
Step by Step – Conditional Formatting in Excel.....	63
Step by Step – Filtering in Excel.....	64
09. Analysis Revision.....	67
Chapter Introduction.....	67
Scenario – Check SEN Pupil Figures	67
Step by Step – Basic Analysis.....	67
Activity – Ethnic Group Analysis	70
Appendix A – RTF Layout Settings	71
Appendix B – Glossary	73
Appendix C – Running Scheduled Reports	75
Chapter Introduction.....	75
Setting up the Report Scheduler	75
Permissions Required	75
Step by Step – Creating a Scheduled Task for Windows 7	75
Selecting Reports for Scheduling	79
Changing the Frequency.....	79
Changing the Date/Day	79
Changing the Start Date/End Date	80
Changing the Previous Output	80
Changing the Skip Holidays	80
Step by Step – Changing the Recipient Name.....	80
Viewing Errors in the Schedule	82
Viewing My Scheduled Reports on the Home Page	82

	Introduction
---	-----------------------

This chapter contains:

Introduction	1
Course Objectives	1
Overview	1
Course Requirements.....	2
Activity – How Well Do You Know Reporting?	2

Introduction

This course will further develop your report designing skills in SIMS, enabling you to extract useful information from the pupil database in a variety of formats.

The course follows on from the Standard Reporting course and so assumes that you are able to create basic reports.

The use of sub-reports where pupils have many pieces of data attached to them, for example contacts, is looked at along with creating user defined templates in Word, Rich Text Format reports, reports from different focuses and outputting to Excel.

Course Objectives

By the end of the course you will have a clear understanding of how reports are produced in SIMS and in particular be able to:

- create Word templates
- report using sub-reports
- understand why you would use a Rich Text Format Report
- report using report inserts
- report on user defined groups
- understand different focuses and create reports using them
- export reports to Excel.

Throughout the course the tasks and activities will be related to scenarios. This will enable you to respond to requests for pupil data from SIMS. These requests may come from sources within the school or externally.

Overview

This course extends the techniques covered in the Standard Reporting course and will:

- enable you to produce more complicated lists and mail merged documents
- show you how to modify templates to adjust the appearance of reports including the incorporation of headed paper
- develop the use of RTF output
- explore cross-modular links in the data
- use different focuses as the starting point for reports
- develop the use of Excel

- extend the use of the analysis tool.

Course Requirements

Delegates must have a basic knowledge of reporting up to the level obtained through the Standard Reporting course. You must be able to create basic reports, which can be output to standard lists or Word mail merges and you must have used SIMS Analysis and other output types from SIMS.

Activity – How Well Do You Know Reporting?

The following three synopses are typical of the sort of requests you may receive in school and will draw on skills from the Standard Reporting course. Work through these, saving each report as it is completed.

- Synopsis 1 – You have been asked by the head teacher to produce a list in Word of all the pupils in school who are on the special education needs (SEN) register.
- Produce a report that will pull out all the pupils in school in alphabetical order who have a SEN Status of SEN Support, Monitor Language Skills or Education, Health and Care Plan. The head teacher would like their Name, Registration Group, Year, and Date of Birth showing alongside their SEN Status.
- Synopsis 2 – The head teacher would now like the report to be altered so that each different SEN status appears on a different Excel worksheet.
- Alter the report so that it can be exported to Excel and split the report so that each SEN status is on a separate sheet.
- Synopsis 3 – The head teacher would like an analysis of how many pupils from each year are on the Special Needs Register. The head teacher would like the numbers of pupils from a specific key stage combined. For example, for Key Stage 3 combine year groups 7, 8 and 9 and export this information to Excel.
- Alter the report using the analysis tool.

01

User Templates in Word Lists

This chapter contains:

Chapter Introduction	3
Scenario – Request to Set Up a Template.....	3
Step by Step – Creating a Template	3
Scenario – Address Report.....	6
Step by Step – Reusing a Template	6
Scenario – Template with Columns	8
Step by Step – Creating a Template with Columns.....	8

Chapter Introduction

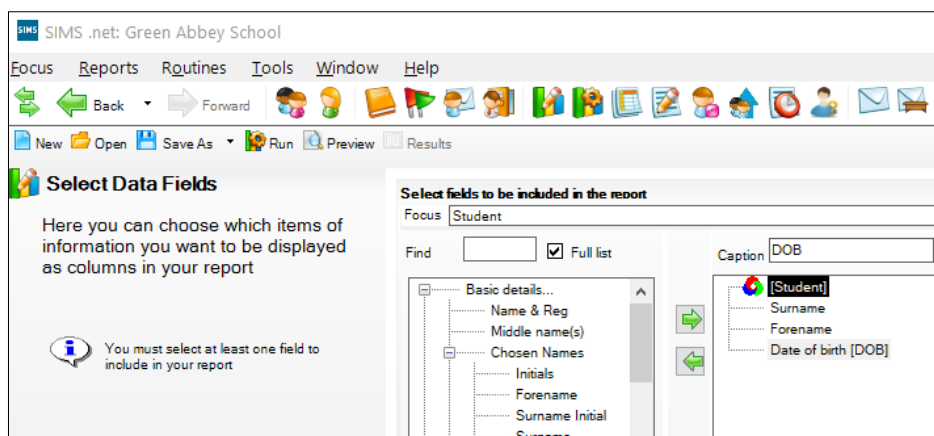
The school would like to standardise their reports. This chapter explains how to produce stock templates using Microsoft Word.

Scenario – Request to Set Up a Template

The school wants the many Word List reports it produces to be created in a specific way, with the school address and logo at the top.

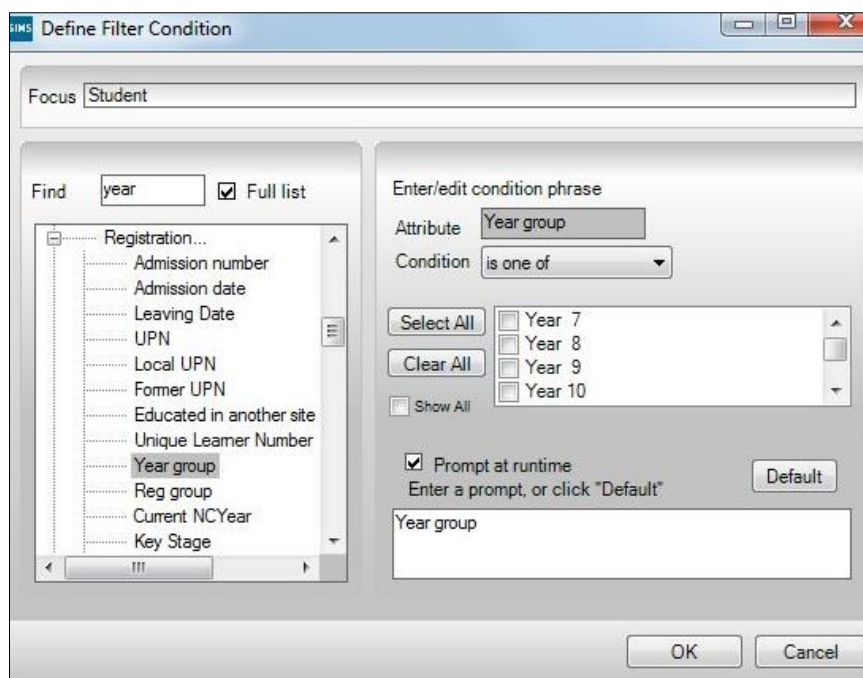
Step by Step – Creating a Template

1. Select **Reports | Design Reports** or click on **Design Report**  to display the **Report Designer** wizard and select to **Create a new report** based on the **Student** focus who are on roll.
2. On the **Select Data Fields** screen add the **Surname, Forename** (from **Chosen Names**) and **Date of Birth** fields by double-clicking the field in the list displayed in the **Select** fields to be included in the report section.

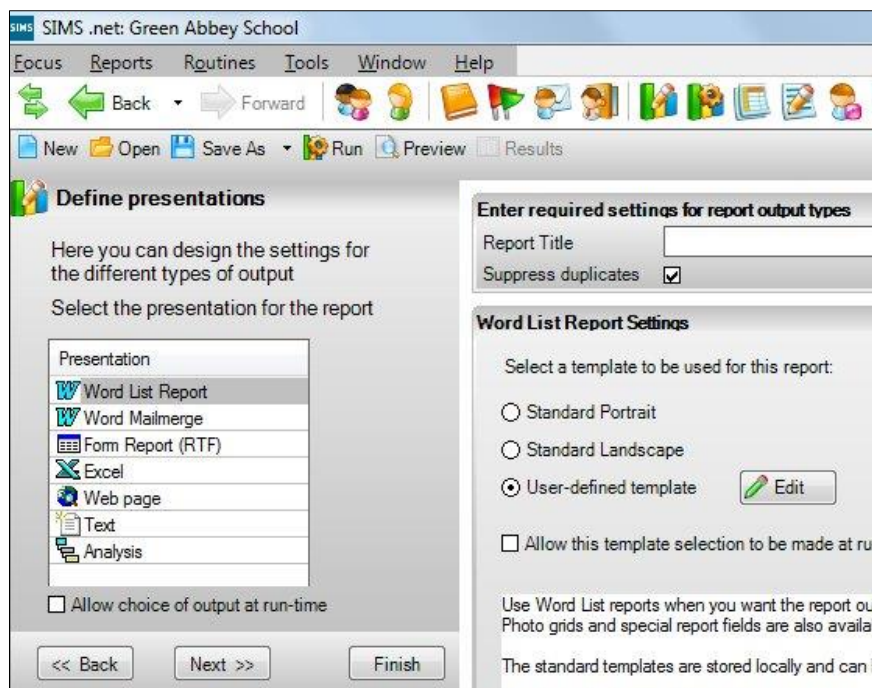


3. Click **Next**.

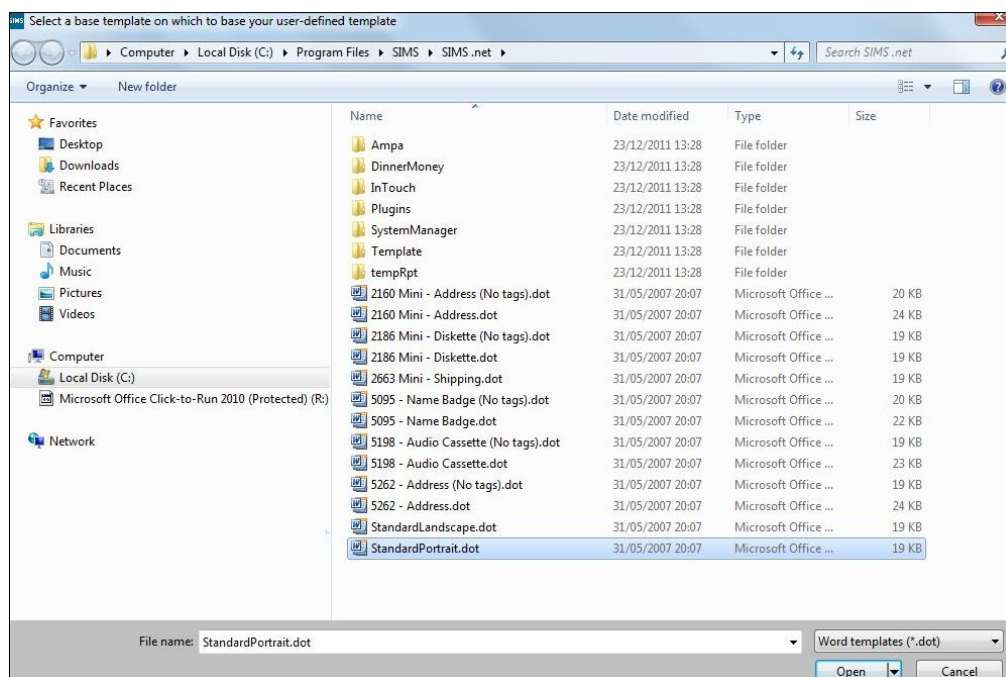
4. In the **Apply Filter** screen click **New** to display the **Define Filter Condition** dialog. Type **Year Group** in the **Find** field and select **Year Group** from the **Attribute** drop-down. Ensure **is one of** is selected from the **Condition** drop-down and select the **Prompt at runtime** checkbox.



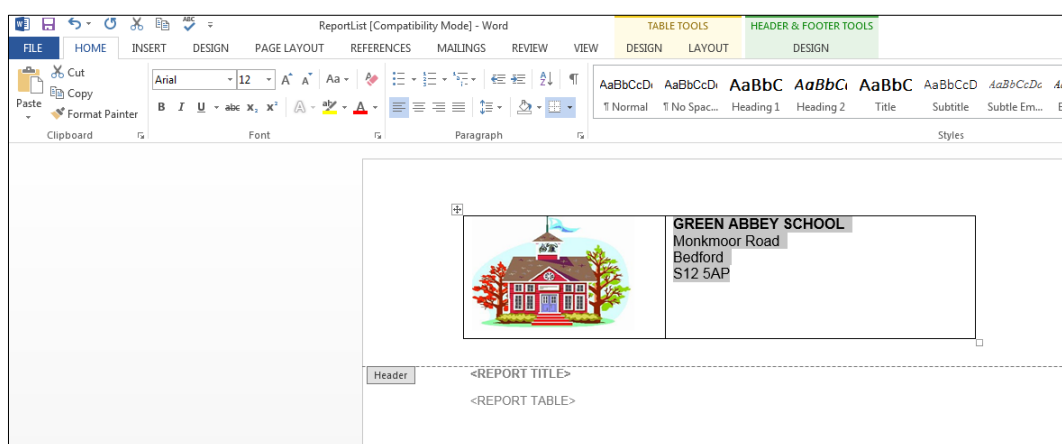
5. Click **OK**.
6. Click **Next** to display the **Define Sort Order** screen. The **Sort Order** can be the default so click **Next**. Click **Next** again.
7. In the **Define Presentation** select **Word List Report** on the **Presentation** panel and select **User Defined Template** on the panel on the right.



A list of existing templates will be displayed.

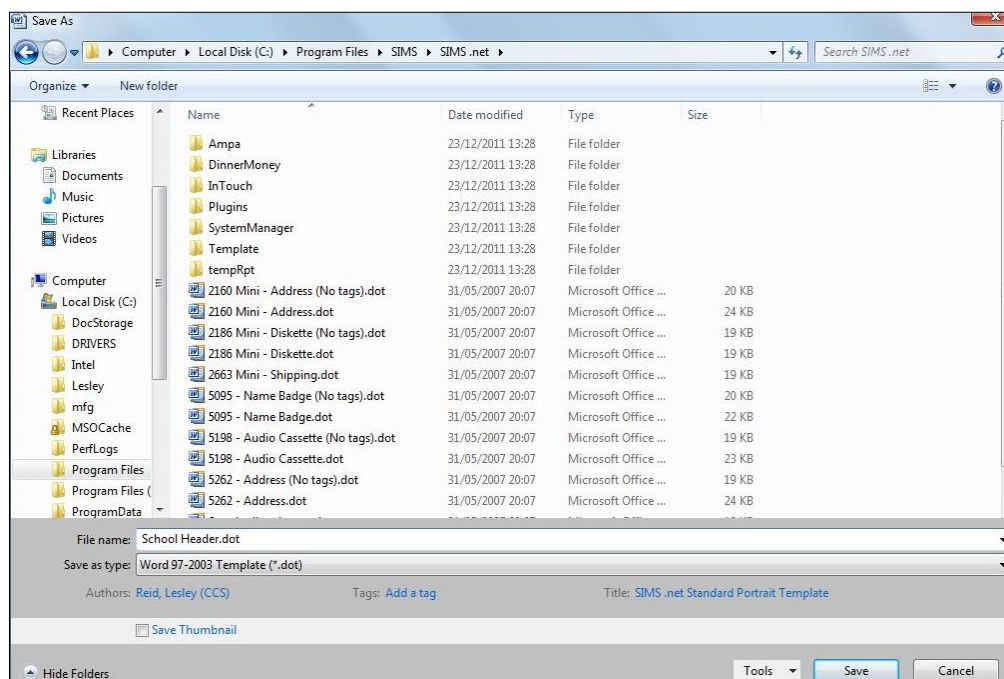


8. Select the **StandardPortrait** template and click **Open**.
9. In Word click **Insert | Header** and select the **Blank** header.
10. Add a table to the **Header** panel by selecting **Insert | Table | Insert Table**.
11. Type **2** in the **Number of columns** field and **1** in the **Number of rows** field. Click **OK**.
12. The table border can be removed by clicking the table, then selecting **Table Tools | Design | Borders**. Change the setting for borders to **No Borders**. Click **OK**.
13. In the left of the inserted table, select **Insert | Clip Art** in Word 2007 and 2010 to add a picture. In Word 2013 onwards select **Insert | Pictures** to insert pictures from your computer.
14. From the **Clip Art** panel on the right, search for a picture to use as a school logo, select a picture to insert into the header. Click **Close**.
15. Click in the right-hand side of the **Header Table** and enter the **School Name, Address, Telephone** and **Email details**.
16. Double-click below the header to close it.



17. Notice the report already has **<Report Title>** and **<Report Table>** inserted.

18. **Office | Save** in Word 2007 or **File | Save** in Word 2010 onwards, to attach the template to the SIMS report.
19. To save the template so that it can be re-used in another report select **Office | Save As** in Word 2007, or **File | Save As** in Word 2010 onwards. Save it in the **SIMS .net** folder (often found at **Program Files\Sims\Sims.net**) with a name of **School Header** and the file type of **Word 97-2003 Template**.



20. Close **MS Word**.
21. Save the report in SIMS with the name **School Header Template in Word** and close the Report Designer window.

Scenario – Address Report

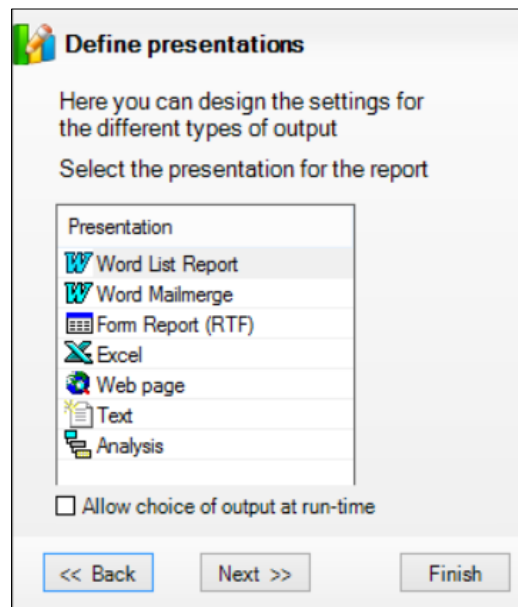
Another member of staff has seen the report in the previous step by step and would like an address report with the same template.

Step by Step – Reusing a Template

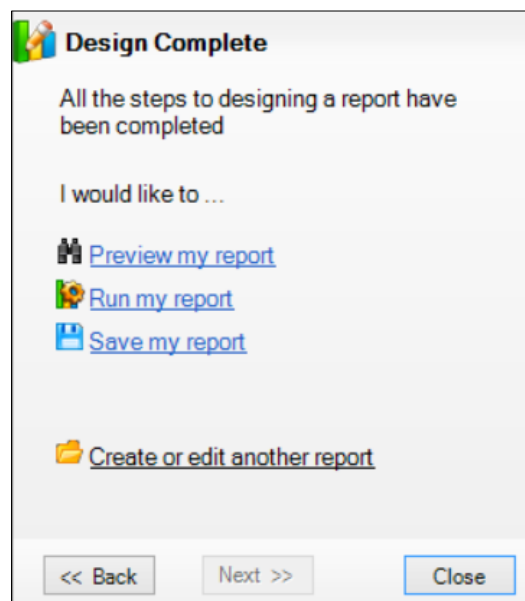
1. Select **Reports | Design Reports** and select the link **Open an existing report** to display the **Open report** dialog. Expand **Focus** and select **Student**, then on the right-hand panel highlight **Addresses** and click **OK**.
2. Click the **Default Output** link in the **Report Summary** panel in the bottom left of the Report Designer window.



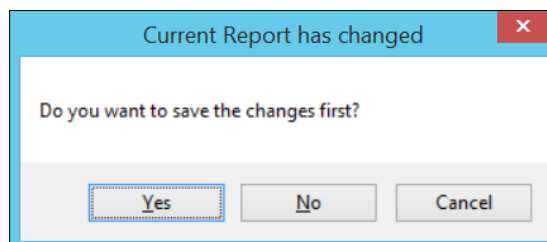
3. Click **Word List Report** in the **Presentation** panel and select **User – Defined Template** on the right-hand panel. From the list shown in the **Program Files\Sims\Sims.net** folder select the **School Header Template** file and click **Open**.
4. Word will open (you may need to click the **Word** link on the task bar at the bottom of the screen if this does not happen automatically).
5. If it is the correct template, click **Save** in Word to attach the template to the SIMS report. **Close** Word and back in SIMS click **Save As** in the report design wizard and give the report a new name of **Addresses with School Header**.
6. Try the report by clicking on **Run**, making appropriate selections from the **Parameters** screen to view list with the template applied in Word. Close Word.
7. Click **Finish** in the Report Designer.



8. Click on the link **Create or edit another report** in the report designer.



- Respond **No** to **Current Report has changed** message box as you saved the design changes in point 5 above with a new report name (you can check the **Report Summary** to see the name of the report - it should read **Addresses with School Header**). If you save it again now the design will remember your parameter choices used to test run the report and prepopulate these parameters every time the report is run.

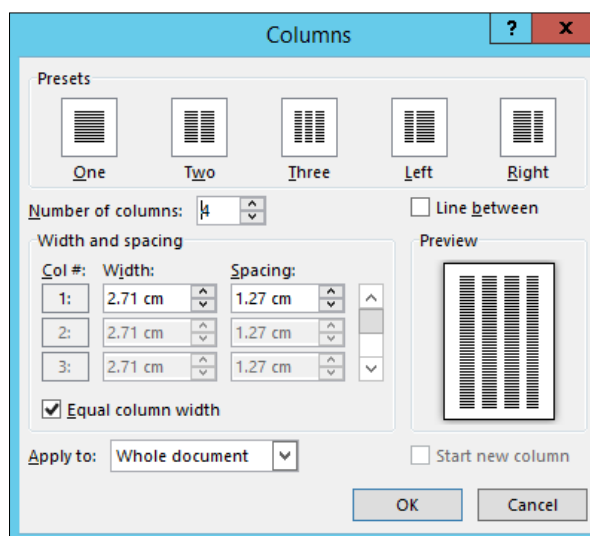


Scenario – Template with Columns

There has been a request for reports to use all the paper not just the left-hand side. If you had a template which used columns you could save paper.

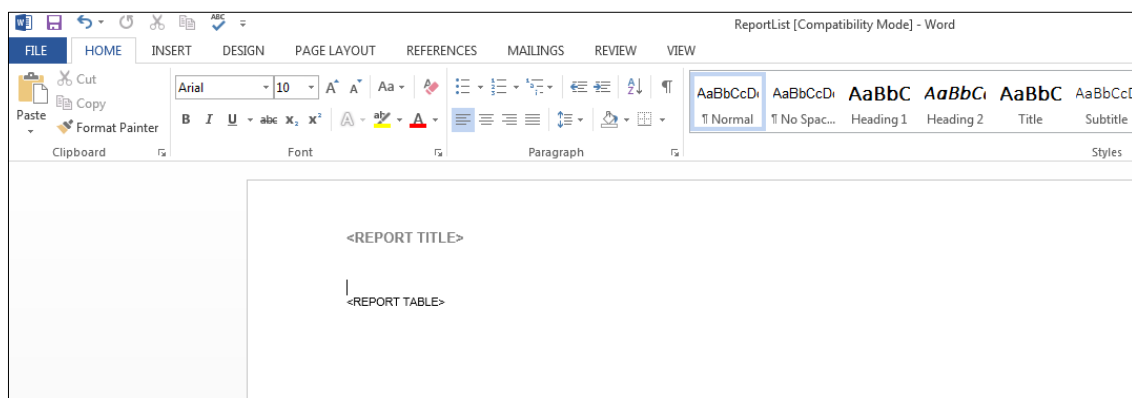
Step by Step – Creating a Template with Columns

- In the Report Designer select **Create a new report**. Base the report on **Student** who are **On Roll**.
- In the **Select Data Fields** screen double-click **Forename & Surname** and **Reg Group** from the list on the left-hand panel in the **Select** fields to be included in the **Report** section. Click **Next**.
- On the **Apply Filter** screen click **New**. In the **Define Filter** panel enter **Year Group** in the **Find** field, ensure **is one of** is selected in the **Condition** drop-down and select the **Prompt at runtime** checkbox. Click **OK** and click **Next**.
- Leave the sort order as the default, which is Surname, Legal Forename.
- Click **Next**.
- Select the **Use Effective Date** checkbox and click **Next**.
- In the **Define Presentations** screen select **Word List Report** from the **Presentation** panel and select **User Defined Template** on the right-hand panel. Select the **StandardLandscape** template and click **Open**.
- In Word select **Page Layout | Columns | More Columns | 4 Columns**, then click **OK**.

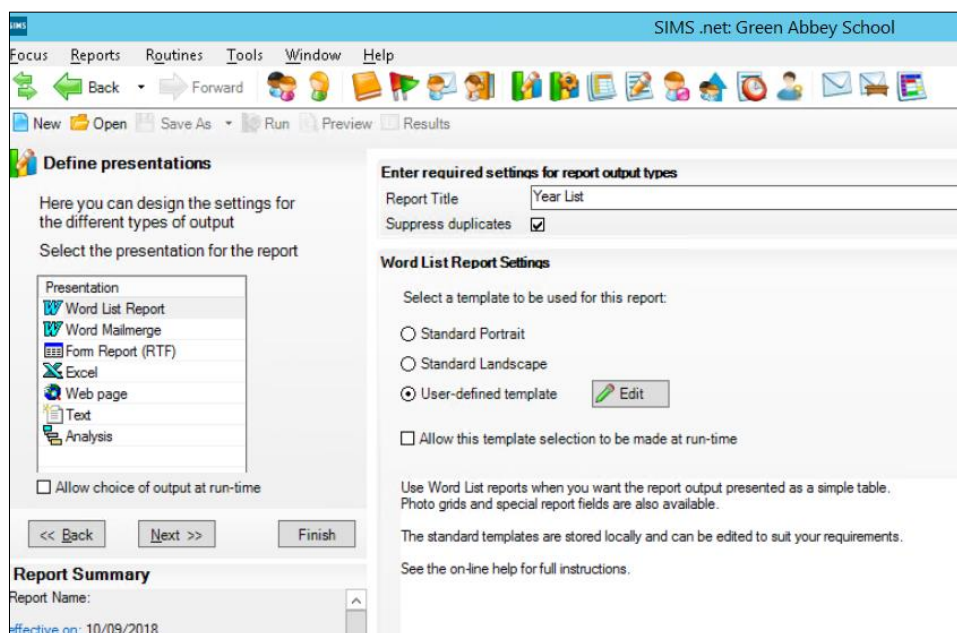


- Highlight **<Report Table>** and set the **Font** size to **8**.

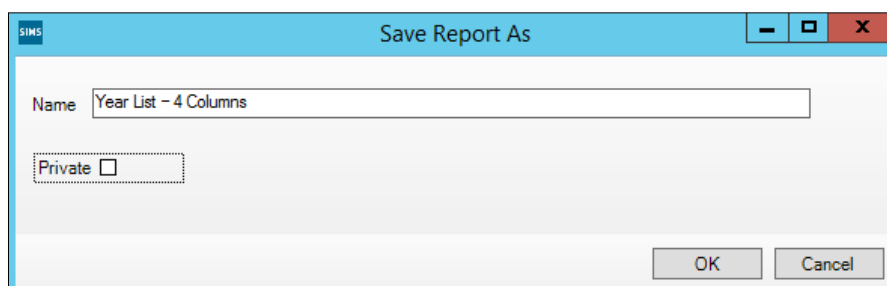
10. Highlight the **<Report Title>** and cut and paste into the **Header (Insert | Header | Blank)**.



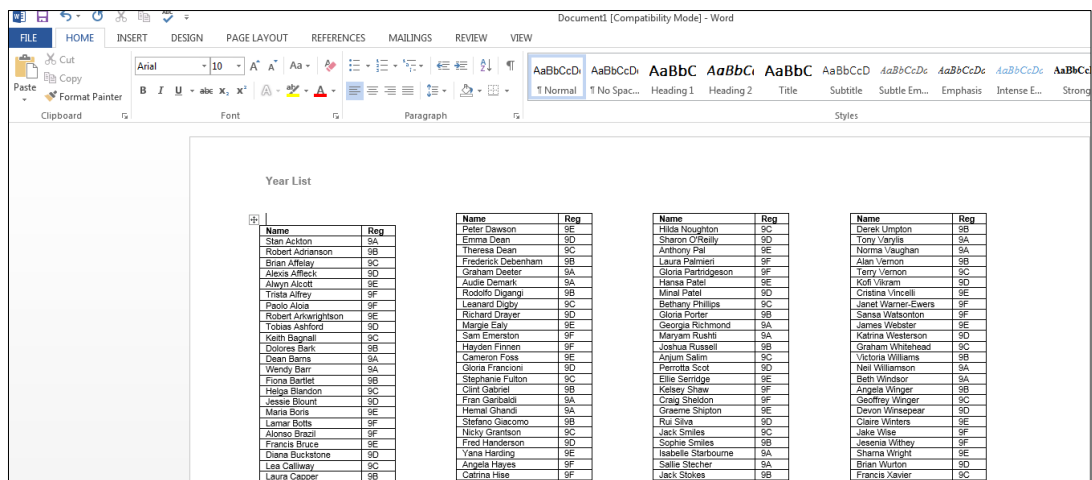
11. **Office | Save** in Word 2007 and **File | Save** in Word 2010 onwards to attach the template to the SIMS report.
12. In Word 2007 save the template by selecting **Office | Save As**. In Word 2010 onwards save the template by selecting **File | Save As**. Ensure **Word 97-2003 Template** is selected from the **Save as type** drop-down and save with the name **Columns**.
13. **Office | Exit Word** to exit from Word 2007. Select **File | Exit** in Word 2010, **File | Close** in Word 2013 onwards.
14. Type **Year List** in the **Report Title** field on the **Enter required settings for report output types** panel on the **Define Presentation** screen.



15. Click **Save As** in SIMS to save the report design and type **Year List – 4 Columns, Yr to be provided** in the **Name** field. Deselect the **Private** checkbox. Click **OK**.



16. Click **Run**. Select a year group from the **Enter Parameter values for report** dialog.



17. The report is presented in Word. Once viewed close Word without saving.

18. Back in SIMS click on **Finish** from the **Design Complete** step of the wizard and click on the link **Create or edit another report** in the report designer, saying **No** to saving the changes.

02

Creating Reports Using Combinations of And/Or Clauses

This chapter contains:

Chapter Introduction	11
Scenario – School Trip List	11
Step by Step – Creating a Report with Dietary Needs and Medical Conditions	11
Activity – Postcode Report	14

Chapter Introduction

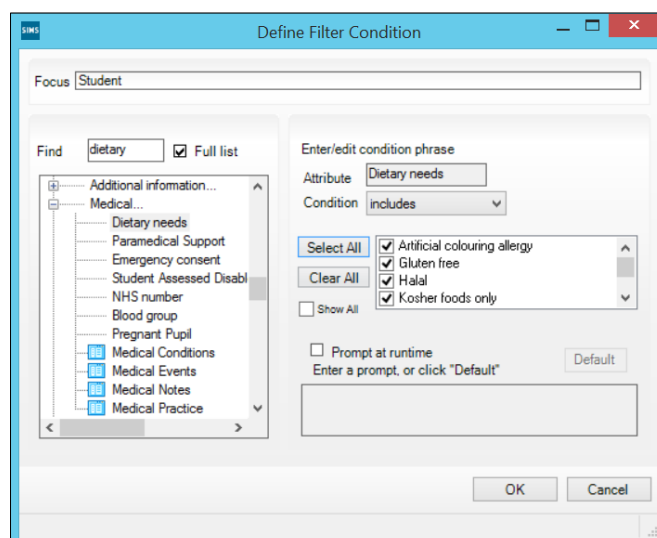
The Standard Reporting course demonstrated how OR and AND clauses can be used in our reports. You can combine the OR and AND clauses to make more advanced reports, which can deal with more complex reporting requirements.

Scenario – School Trip List

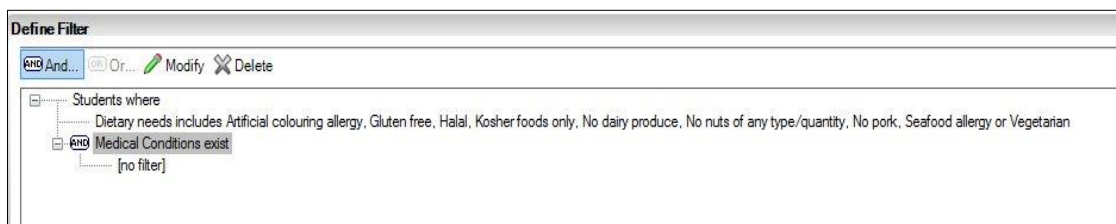
When a group of pupils go on a school trip, the organiser needs a list of any pupils with a medical condition or a dietary need. You will produce this report for a registration group.

Step by Step – Creating a Report with Dietary Needs and Medical Conditions

1. Select to **Create a New Report**.
2. Base the report on **Student** and **On Roll**.
3. In the **Fields** for the report screen, select **Surname, Forename, DOB, Reg Group, Dietary Needs** and from the **Medical Condition** sub-report, select **Description**. Change the caption to **Medical Condition**.
4. Click **Next**.
5. In the **Apply Filter** screen click **New** at the top of the **Define Filter** panel. In the **Define Filter Condition** dialog box type **dietary** in the **Find** field. **Dietary needs** should be selected and the **Attribute** field populated accordingly. Ensure the **Condition** is set to **includes** and click **Select All**. Click **OK**.



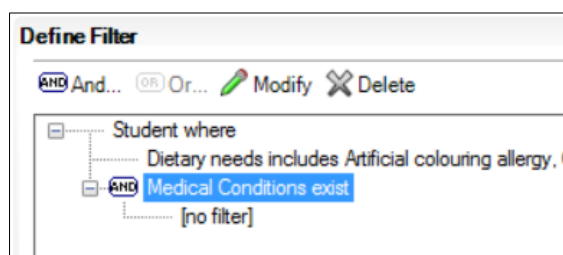
6. Click **And** at the top of the **Define Filter** panel to add the second filter. Select the **Medical Conditions** sub-report and click **OK** so that it says **Medical Conditions exist**.



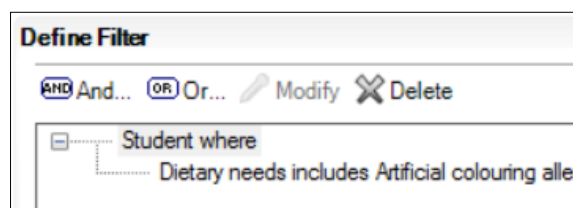
7. Click **Next** to display the **Define Sort Order** step. Select **Reg group**, **Surname** and **Forename** and click **Next** twice.
8. Click **Save As** to save the report as **Dietary Needs or Medical Condition by Reg** and deselect the **Private** checkbox. Click **OK**.
9. Click on **Preview** in the **Report Designer** toolbar.

Surname	Forename	DOB	Reg	Dietary needs	Medical Condition
Bartle	Grace	04/05/2005	10E	No dairy produce	Eczema
Williams	Tyler	20/07/2004	11F	Artificial colouring allergy, Gluten free, No dairy produce, No nuts of any type/quantity, No pork, Seafood allergy, Vegetarian	None
Kennedy	Max	15/10/2006	8D	No nuts of any type/quantity	Anaphylaxis
Aston	Finlay	12/01/2007	8F	Seafood allergy	Anaphylaxis
White	Edith	07/06/2006	9A	Artificial colouring allergy, Gluten free, Halal, No dairy produce, No nuts of any type/quantity, No pork	Anaphylaxis
Amitage	Jasper	06/09/2005	9B	Seafood allergy	Hayfever
Norton	Hannah	01/04/2006	9C	Seafood allergy	Anaphylaxis
Ackton	Stan	18/12/2001	G	Seafood allergy	Asthma

10. As we created an **AND** clause in the filter the results are showing us only those students with both a Dietary Need *and* a Medical Condition. This was not the required report.
11. Return to the Report Designer wizard by clicking on **Design** in the **Report Designer** toolbar.
12. Return to the filter step of the design. The filter needs to be altered so that instead of using **And** after adding the **Dietary Needs** filter, we use **Or**.



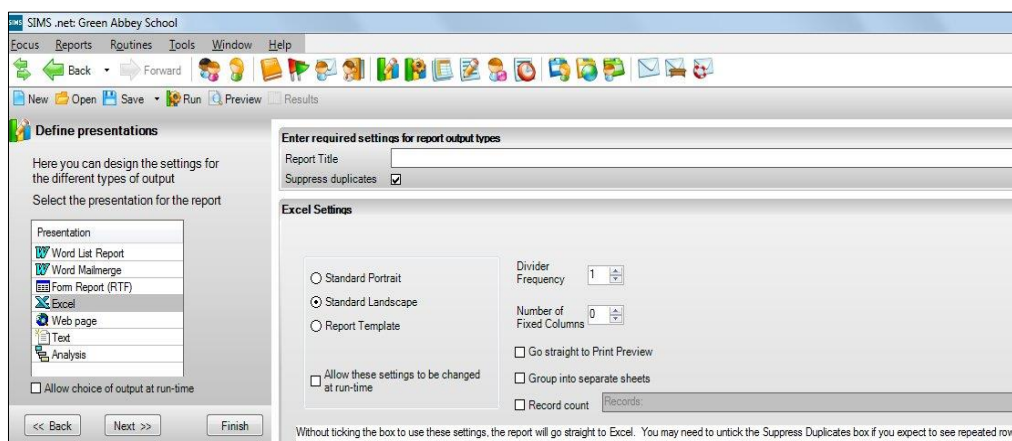
13. Click on the line that reads **AND Medical Conditions exist**. Click on **Delete** to remove that line.



14. Select **Or** this time and as before select the **Medical Conditions** sub-report and click **OK** so that it says **Medical Conditions exist**.
15. Preview the report again to see the difference.

Surname	Forename	DOB	Reg	Dietary needs	Medical Condition
Biggar	Davina	16/06/2005	10A		Diabetes
Davies	Bette	12/08/2005	10B		Asthma
Greene	Elijah	13/04/2005	10C		Hayfever
Ipkiass	Alexander	02/02/2005	10D	Vegetarian	
Jenkins	Sebastian	11/09/2004	10D	Gluten free	
Bartle	Grace	04/05/2005	10E	No dairy produce	Eczema
Fynn	Hayley	08/03/2005	10E	No nuts of any type/quantity	
Malik	Yanik	08/08/2005	10E	Halal	
Thatchley	Rex	10/05/2005	10E		Asthma
Little	Patrick	01/01/2004	11A		Anaphylaxis
Little	Simon	03/09/2003	11B		Anaphylaxis
Stephens	Michael	09/10/2003	11F		Asthma
Williams	Tyler	20/07/2004	11F	Artificial colouring allergy, Gluten free, No dairy produce, No nuts of any type/quantity, No pork, Seafood allergy, Vegetarian	None
Kennedy	Max	15/10/2006	8D	No nuts of any type/quantity	Anaphylaxis
Coppler	Robin	02/02/2007	8E	No dairy produce	
Aston	Finlay	12/01/2007	8F	Seafood allergy	Anaphylaxis
Hassan	Farookh	15/08/2007	8F	Halal	
Elliot	Fran	22/09/2005	9A	Vegetarian	
Geofferson	Victor	11/08/2006	9A	Gluten free	
White	Edith	07/06/2006	9A	Artificial colouring allergy, Gluten free, Halal, No dairy produce, No nuts of any type/quantity, No pork	Anaphylaxis
Armitage	Jasper	06/09/2005	9B	Seafood allergy	Hayfever
Davis	Stephen	22/10/2005	9B		Diabetes
Sahonta	Anna	04/01/2006	9B	Halal	
Norton	Hannah	01/04/2006	9C	Seafood allergy	Anaphylaxis
Harrison	Jenny	01/10/2005	9D	Gluten free	
Ishmail	Ashraf	01/02/2006	9D	Halal	
Smitt	Christian	10/01/2006	9E	No nuts of any type/quantity	
Warrington	Kristie	25/11/2005	9E	Vegetarian	
Warrington	Edith	21/10/2005	9F	Gluten free	
Ackdon	Stan	18/12/2001	G	Seafood allergy	
Queen	Ryan	04/04/2003	H		Asthma
Right	Paul	14/06/2003	J		Osteoporosis
Cory	Richard	30/11/2002	K		Epilepsy
Onnet	Trevor	17/11/2002	K		Eczema
Arthur	Steven	30/09/2002	M		Eczema
Atkinson	Ben	23/03/2003	N		Hayfever
Atkinson	Ben	23/03/2003	N		Asthma

16. This time we have many students who have either a Dietary Need or a Medical Condition, or both.
17. Click on **Design** and on the **Default Output** link on the bottom left of the **Report Summary**.
18. In the **Define Presentations** step, select **Excel** in the **Presentation** panel. Click **Standard Landscape** and deselect the **Go straight to Print Preview** checkbox in the right-hand panel.



19. **Save** the changes to the report design and then click **Run**. Select **Enable Macro Content** if prompted.
20. View the report in Excel and close Excel without saving when finished.
21. In SIMS, in the Report Designer, click on the link to **Create or edit another report**, saying **No** to saving the the changes if prompted (on the basis you saved it in step 19 above).

Activity – Postcode Report

A list of pupils from specific postcodes is often required in school, for example there are to be major road works in an area and the attendance officer would like to know which pupils might be affected.

- Create a report which will list the pupils who live in either MK40 or MK41 postcode areas.
- Fields for the report are Forename, Surname, Reg Group, Town and Postcode. Sort the report by Postcode and run it as an Excel report.

03

Sub-Reports

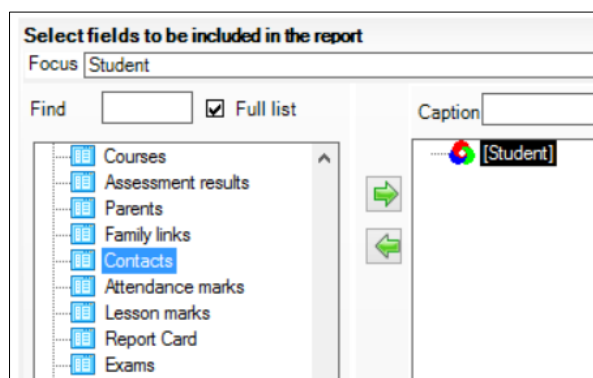
This chapter contains:

Chapter Introduction	15
Scenario – Request for List of Pupils with Contacts	15
Step by Step – Emergency Contact Report	15
Scenario – Behaviour Report.....	22
Step by Step – Producing a Behaviour Report.....	22
Activity – Request for SEN Review Information	25
Activity – Request for Pupil Premium Information	25

Chapter Introduction

So far, any reports that have been created have used fields from the report's main focus area, for example the Student area. Some reports require a related field to be included from another data area. The blue table icons you may have noticed on the navigation tree represent other data tables within which you will find the related fields from these areas. When the related fields are used in a report you are creating sub-reports.

The blue table icon shows where there is a one-to-many relationship in the information. For example, if you look at the Contact field for a pupil you will find it has a blue table icon, as a single pupil may have many contacts.



This chapter will look at this area and explore how to filter and sort on sub-reports.

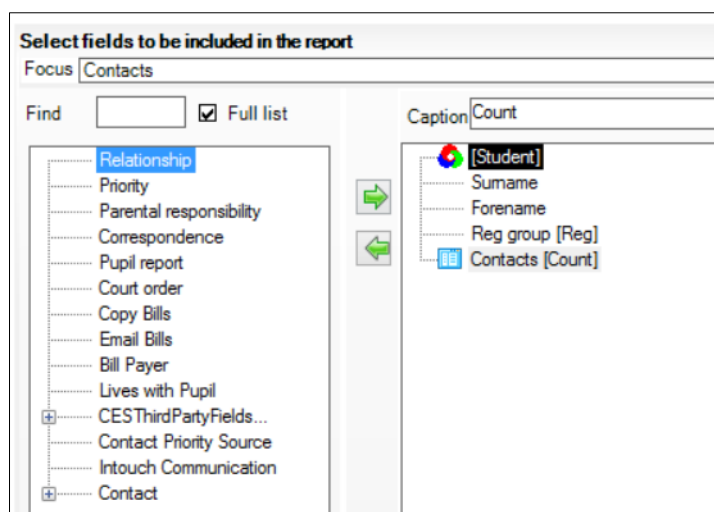
Scenario – Request for List of Pupils with Contacts

A head of year has asked for a list of pupils in their year with details of their contacts to use as an emergency report.

Step by Step – Emergency Contact Report

1. In the **Report Designer** select to **Create a New Report** based on **Students On roll**.
2. In the **Select Data Fields** screen select the fields **Surname**, **Forename** (from **Chosen Names**) and **Reg group**.
3. Scroll down the list of fields and find the **Contacts** table. The blue table icon shows that this is a one-to-many relationship, as one pupil may have many contacts.

- Double-click the table name, **Contacts**, with the blue icon, to attach the Contacts table to the report design and to create a sub-report on this additional data area. Notice that the fields on the left side change to display the fields contained within the Contacts table. These are the related fields.



Without adding any related fields in the sub-report just yet, notice the Contacts sub-report on the right side has the caption of **Count** (shown in square brackets []).

- Preview** the report.

Preview Report Results

Details Extend Exclude View... View: Selected Rows: 777

Surname	Forename	Reg	Count
Aaron	Chris	8A	2
Aaron	Jason	8B	2
Aaron	Liz	8C	2
Aaron	Sophie	8D	2
Abbess	Graham	11A	2
Abbey	Sean	11B	2
Ackton	Stan	G	2
Ackton	Stephen	8E	2
Acton	Jordan	10F	2
Acton	Samantha	11A	2
Adams	Adam	9A	2
Adams	George	10B	1
Adasheji	Mohammed	8F	2
Adebayi	Emmanuel	10F	2
Affleck	Alexis	K	2
Aloia	Paolo	N	2
Alsop	Sabrina	7B	2
Amelia	Goss	8F	1
Americana	Kari	10D	2
Amis	Harold	8E	2
Amnar	Tarak	7C	2
Amos	Rachael	10E	2
Amoso	Sily	11A	2

- Notice the report contains the student's name, registration group and the **Count** column shows the number of the records in the related Contacts table for that student.
- You would like some information about the contact such as name and relationship to the student. Click **Design** to return to the report design and ensure the Contacts sub-report is selected on the right side in order to see the relevant fields on the left side.
- Add the **Relationship**, **Priority** and **parental responsibility** fields. Notice that the Contacts sub-report no longer has the caption of [Count] next to it.
- Click the + next to **Contact** at the bottom of the navigation tree to display more fields about contacts.
- Add the **Full Name** field to the sub-report.

11. In the same way expand **Contact Information** and add **Main Telephone Number**.

12. You would like to add some more details about the pupil and would like the original list of fields to be displayed. To do this click **Student** at the top of the list of selected fields on the right.
13. Notice that the original list of fields relating to a pupil is now shown. Pick **Gender** and notice that it goes after **Reg group** and before the **Contacts** sub-report.
14. **Save** the report design so far with the name **Contact List**.
15. **Preview** the report to check it is working.

Preview Report Results								
View: Selected Rows: 1372								
Surname	Forename	Reg	Gender	Relationship	Priority	Parental responsibility	Full name	Main Telephone
Aaron	Chris	8A	M	Father	1	T	Mr Jonas Aaron	01632 823717
Aaron	Chris	8A	M	Mother	1	T	Mrs Tia Aaron	
Aaron	Jason	8B	M	Father	2	F	Mr Daniel Aaron	07333 181222
Aaron	Jason	8B	M	Mother	1	F	Mrs Judith Aaron	07333 292911
Aaron	Liz	8C	F	Father	1	T	Mr Jonas Aaron	01632 823717
Aaron	Liz	8C	F	Mother	1	T	Mrs Tia Aaron	
Aaron	Sophie	8D	F	Father	1	T	Mr Jonas Aaron	01632 823717
Aaron	Sophie	8D	F	Mother	1	T	Mrs Tia Aaron	
Abbess	Graham	11A	M	Father	1	F	Mr Terry Abbess	01632211117
Abbess	Graham	11A	M	Mother	2	T	Mrs Hilda Abbess	01632211117
Abbey	Sean	11B	M	Father	1	F	Mr Robert Abbey	01632211119
Abbey	Sean	11B	M	Mother	2	T	Mrs Helen Abbey	01632211119
Ackton	Stan	G	M	Father	1	T	Mr Richard Ackton	07333 111119
Ackton	Stan	G	M	Mother	2	T	Mrs Kimberly Ackton	07333 111118
Ackton	Stephen	8E	M	Father	2	T	Mr Richard Ackton	07333 111119
Ackton	Stephen	8E	M	Mother	1	T	Mrs Kimberly Ackton	07333 111118
Acton	Jordan	10F	M	Father	2	T	Mr Robert Acton	07110200900
Acton	Jordan	10F	M	Mother	1	T	Mrs Jayne Acton	01632 775566
Acton	Samantha	11A	F	Father	2	T	Mr Robert Acton	07110200900
Acton	Samantha	11A	F	Mother	1	T	Mrs Jayne Acton	01632 775566
Adams	Adam	9A	M	Father	1	T	Mr Hany Adam	01632 412412
Adams	Adam	9A	M	Mother	1	F	Mrs Rebecca Adams	
Adams	George	10B	M	Mother	1	T	Ms Ivy Welch	01632 347872
Adasheji	Mohammed	8F	M	Father	2	T	Mr Tanzeel Adasheji	01632 7118991
Adasheji	Mohammed	8F	M	Mother	1	T	Mrs Panjita Adasheji	01632 7118991
Adebayi	Emmanuel	10F	M	Father	2	T	Mr Zinedane Adebayi	
Adebayi	Emmanuel	10F	M	Mother	1	F	Mrs Karen Adebayi	01632 556871
Affleck	Alexis	K	F	Father	2	T	Mr John Affleck	
Affleck	Alexis	K	F	Mother	1	T	Mrs Jacqueline Affleck	
Aloia	Paolo	N	M	Father	2	T	Mr Uberto Aloia	
Aloia	Paolo	N	M	Mother	1	T	Mrs Nina Aloia	

At the moment it runs for all students in student name order, the default settings.

16. Click **Design** to return to the report design.
17. On the **Apply Filter** step define a new filter condition for **Year group**. Ensure the **Condition** is set to **is one of** and select the **Prompt at run time** checkbox.

18. Move to the **Define Presentation** step.
19. Select **Word List Report** from the **Define Presentations** panel and select **Standard Landscape**.
20. **Save** the updated report design.
21. Click **Run**, select any year group and click **OK**. Word will open with the output; notice that for each pupil there might be multiple contacts as in the example below.

Surname	Forename	Reg	Gender	Relationship	Priority	Parental responsibility	Full-name	Main-Telephone
Adams	Adam	10A	M	Father	1	T	Mr Harry Adams	01632-412412
				Mother	1	F	Mrs Rebecca Adams	
Ashdown	Rae	10B	M	Father	2	T	Mr Rick Ashdown	07333-658609
				Mother	1	T	Mrs Rhannon Ashdown	01632-616312
Badger	David	10C	M	Father	2	T	Mr Mike Badger	01632-721721
				Mother	1	T	Mrs Kelly Badger	01632-721721
Bailey	Gareth	10D	M	Father	2	T	Mr Jeremy Bailey	01633-232944
				Mother	1	T	Mrs Oonah Bailey	01633-232944
Bailey	Liam	10E	M	Father	2	T	Mr Colin Bailey	01632-420120
				Mother	1	T	Mrs Madeleine Bailey	01632-420120
Bains	Kirk	10F	M	Father	2	F	Mr Joseph Bains	
				Mother	1	F	Mrs Helene Bains	01632-445598
Baker	Jordan	10F	M	Father	2	T	Mr Jackson Baker	01632-268269
				Mother	1	T	Mrs Lisa Baker	01632-268269
Bartle	Grace	10E	F	Father	2	T	Mr Jonathan Bartle	07333-589458
				Mother	1	T	Mrs Jinjeng Bartle	01632-303803
Bellic	Nico	10D	M	Mother	1	T	Ms Maria Bellic	01632-776600
Bellic	Roman	10C	M	Mother	1	T	Ms Maria Bellic	01632-776600
Bernard	Edward	10B	M	Father	2	T	Mr Scott Bernard	07333-210210
				Mother	1	T	Mrs Maisie Bernard	01632-759495
Biggar	Davina	10A	F	Father	2	T	Mr Ashley Biggar	07333-595099
				Mother	1	T	Mrs Kayleigh Biggar	01632-506909
Black	Shauna	10A	F	Father	2	T	Mr Gerraint Black	01632-869069
				Mother	1	T	Mrs Tiffany Black	01632-869069

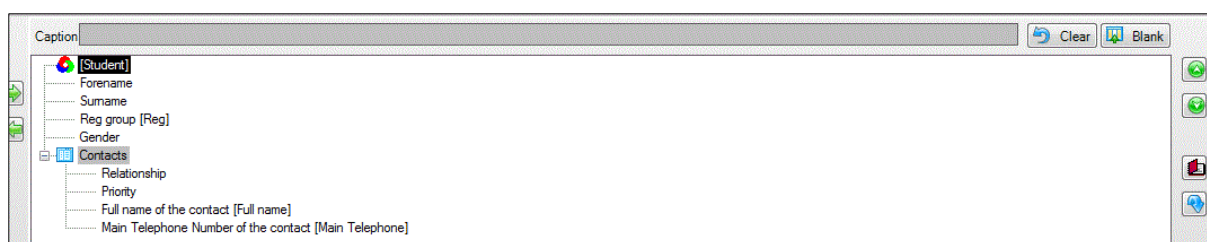
22. Notice that a pupil's name only shows once. This makes it easy to read but isn't always the desired layout. Also notice that the contacts are not in any order.

23. **Close** the Word document and return to SIMS.

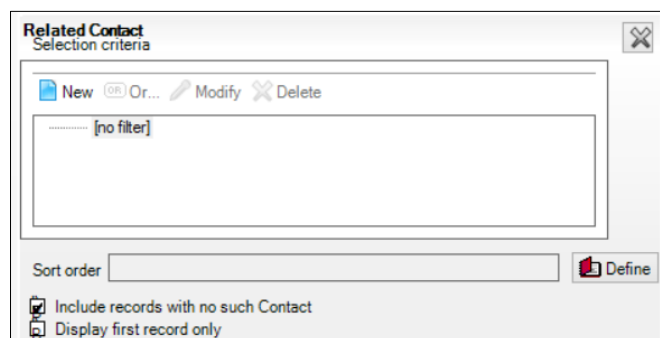
We want to alter the report so that the contacts for each pupil are shown in priority order. That is, the data being extracted in the sub-report is itself sorted and then added to the related field in the main focus area of the report. So this sort criteria needs to be specified in the sub-report.

24. Move back to the **Data Fields** step in the design.

25. Select, with a single click, the **Contacts** sub-report; an icon with a red book, called **Define settings for this sub-report**, should now appear in the right margin.



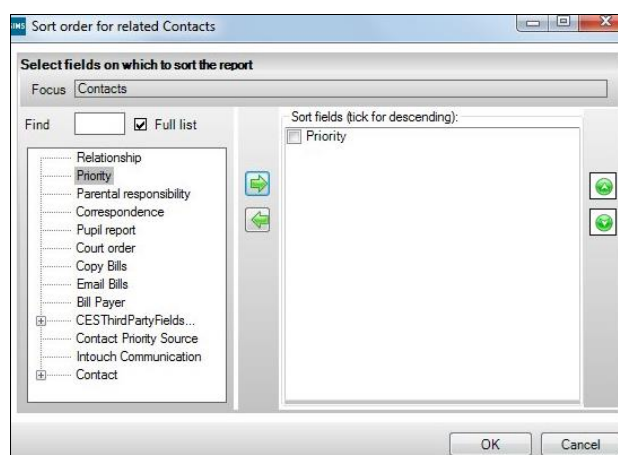
26. Click on the red book to open a panel at the bottom of the window where we can specify the **Related Contact Selection criteria**, otherwise known as the filter for the sub-report.



Underneath you will see a **Sort order** box where we can define the order that the data in the sub-report is displayed.

27. Click **Define** next to the **Sort Order** field.

A **Sort order for related Contacts** dialog box is displayed.



28. Select **Priority** as the sort field and click **OK**.

29. There are two checkboxes, **Include records with no such Contacts** and **Display first record only** at the bottom of the screen. When selected, **Include records with no such Contacts** will include all students (the main report focus) in the report regardless of whether they have any records in the Contacts sub-report. If deselected the students will only be included in the report if they have at least one record on the sub-report.

The **Display first record only** checkbox will display the first record in the Contacts sub-report for each student but no further contacts.

In this report we will need the top checkbox selected but not the second as we would like every student included in the report and every contact in the sub-report included as well.

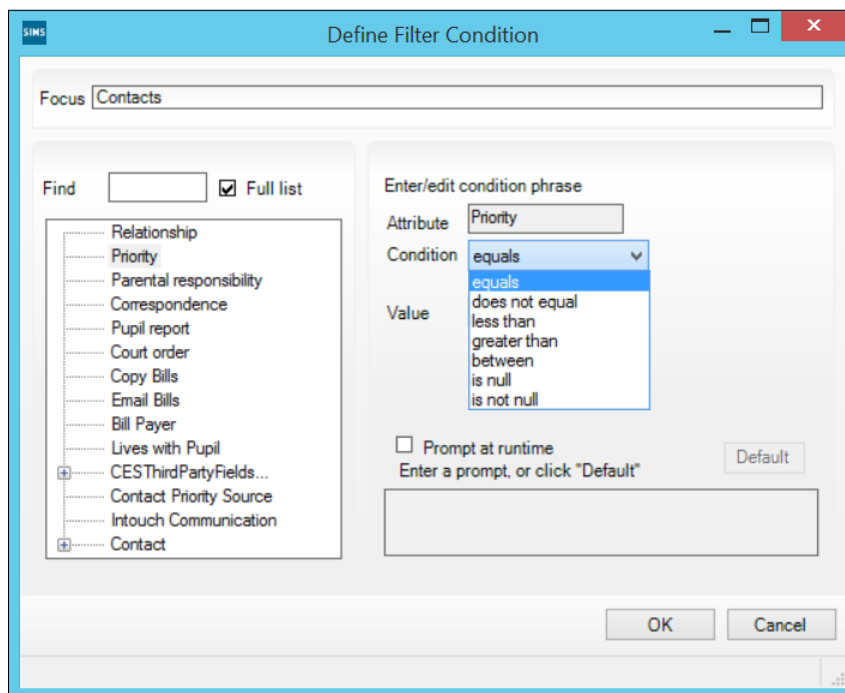
30. Save your changes and run the report again for the same group.

Surname	Forename	Reg	Gender	Relationship	Priority	Parental responsibility	Full-name	Main Telephone
Malik	Yanik	10E	M	Social Worker		T	Miss Lisa Denton	01632 578897
Adams	Adam	10A	M	Father	1	T	Mr Harry Adam	01632 412412
				Mother	1	F	Mrs Rebecca Adams	
Ashdown	Rae	10B	M	Mother	1	T	Mrs Rhannon Ashdown	01632 616312
Badger	David	10C	M	Mother	1	T	Mrs Kelly Badger	01632 721721
Bailey	Gareth	10D	M	Mother	1	T	Mrs Oonah Bailey	01633 232944
Bailey	Liam	10E	M	Mother	1	T	Mrs Madeleine Bailey	01632 420120
Bains	Kirk	10F	M	Mother	1	F	Mrs Helene Bains	01632 445598
Baker	Jordan	10F	M	Mother	1	T	Mrs Lisa Baker	01632 268269
Bartle	Grace	10E	F	Mother	1	T	Mrs Jinjeng Bartle	01632 303803
Bellic	Nico	10D	M	Mother	1	T	Ms Maria Bellic	01632 776600
Bellic	Roman	10C	M	Mother	1	T	Ms Maria Bellic	01632 776600
Bernard	Edward	10B	M	Mother	1	T	Mrs Maisie Bernard	01632 759495
Biggar	Davina	10A	F	Mother	1	T	Mrs Kayleigh Biggar	01632 506909
Black	Shauna	10A	F	Mother	1	T	Mrs Tiffany Black	01632 869069
Bourne	Daisy	10B	F	Mother	1	T	Mrs Vanessa Bourne	01632 790659
Brooks	Kirsten	10C	F	Mother	1	T	Mrs Gail Brooks	01632 690460
Cadilla	Celia	10D	F	Mother	1	T	Ms Madison Cadilla	01632 442121
Carlsen	Neville	10E	M	Father	1	T	Mr John Carlsen	01632 897566
Cash	Edward	10F	M	Mother	1	T	Mrs Rebecca Cash	01632 329029
Charles	Harry	10F	M	Mother	1	T	Mrs Siobhan Charles	07333 821309
Chesham	Tobias	10E	M	Mother	1	T	Ms Maria Chesham	01632 431432
Cleave	Justine	10D	F	Mother	1	T	Mrs Kathryn Cleave	01632 321302
Cooper	Yvonne	10C	F	Mother	1	T	Mrs Melissa Cooper	01632 700600
Crawford	Samantha	10B	F	Mother	1	T	Mrs Jen Crawford	01632 889777
Danny	Abe	10A	F	Mother	1	T	Mrs Evie Danny	01632 553311
Daskalos	Carl	10A	M	Father	1	T	Dr George Daskalos	01632 785443
				Mother	1	T	Mrs Katarina Daskalos	
Davies	Bette	10B	F	Mother	1	T	Mrs Juliette Davies	01632 797909
Dawson-Smith	Jessica	10C	F	Mother	1	T	Ms Suzanne Dawson-Smith	01632 770099

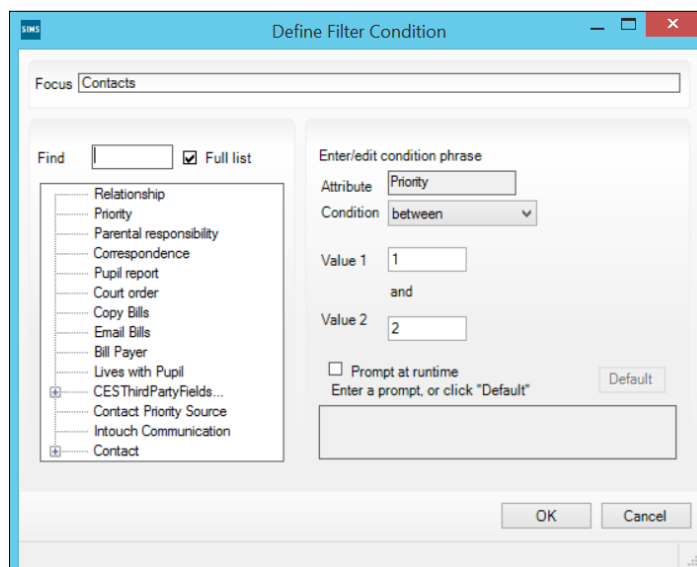
31. This actually hasn't had the desired effect. Notice that the contacts have been sorted on the sub-report by the **Priority** column, as we specified, but overriding the default sort order of the main report, the students' names. Therefore the contact data has been grouped with all the priority 1 contacts together for all students and all the priority 2 contacts grouped together and the students' individual records split up.
32. Close the Word document and return to the report design in SIMS.
33. Move to the **Sort Order** step of the report designer wizard and select **Surname, Forename** (from **Chosen Names**).
34. **Run** the report again for the same group. This time notice that as well as the list being in alphabetical order of student name, the sub-report with the **Contact Details** in is in **Priority** order.

Surname	Forename	Reg	Gender	Relationship	Priority	Parental responsibility	Full-name	Main Telephone
Adams	Adam	10A	M	Father	1	T	Mr Harry Adam	01632 412412
				Mother	1	F	Mrs Rebecca Adams	
Ashdown	Rae	10B	M	Mother	1	T	Mrs Rhannon Ashdown	01632 616312
				Father	2	T	Mr Rick Ashdown	07333 658609
Badger	David	10C	M	Mother	1	T	Mrs Kelly Badger	01632 721721
				Father	2	T	Mr Mike Badger	01632 721721
Bailey	Gareth	10D	M	Mother	1	T	Mrs Oonah Bailey	01633 232944
				Father	2	T	Mr Jeremy Bailey	01633 232944
Bailey	Liam	10E	M	Mother	1	T	Mrs Madeleine Bailey	01632 420120
				Father	2	T	Mr Colin Bailey	01632 420120
Bains	Kirk	10F	M	Mother	1	F	Mrs Helene Bains	01632 445598
				Father	2	F	Mr Joseph Bains	
Baker	Jordan	10F	M	Mother	1	T	Mrs Lisa Baker	01632 268269
				Father	2	T	Mr Jackson Baker	01632 268269
Bartle	Grace	10E	F	Mother	1	T	Mrs Jinjeng Bartle	01632 303803
				Father	2	T	Mr Jonathan Bartle	07333 589458
Bellic	Nico	10D	M	Mother	1	T	Ms Maria Bellic	01632 776600
Bellic	Roman	10C	M	Mother	1	T	Ms Maria Bellic	01632 776600
Bernard	Edward	10B	M	Mother	1	T	Mrs Maisie Bernard	01632 759495
				Father	2	T	Mr Scott Bernard	07333 210210
Biggar	Davina	10A	F	Mother	1	T	Mrs Kayleigh Biggar	01632 506909
				Father	2	T	Mr Ashley Biggar	07333 595099
Black	Shauna	10A	F	Mother	1	T	Mrs Tiffany Black	01632 869069
				Father	2	T	Mr Gerraint Black	01632 869069
Bourne	Daisy	10B	F	Mother	1	T	Mrs Vanessa Bourne	01632 790659
				Father	2	T	Mr Derek Bourne	01632 790659
Brooks	Kirsten	10C	F	Mother	1	T	Mrs Gail Brooks	01632 690460
				Father	2	T	Mr Frank Brooks	07333 670570

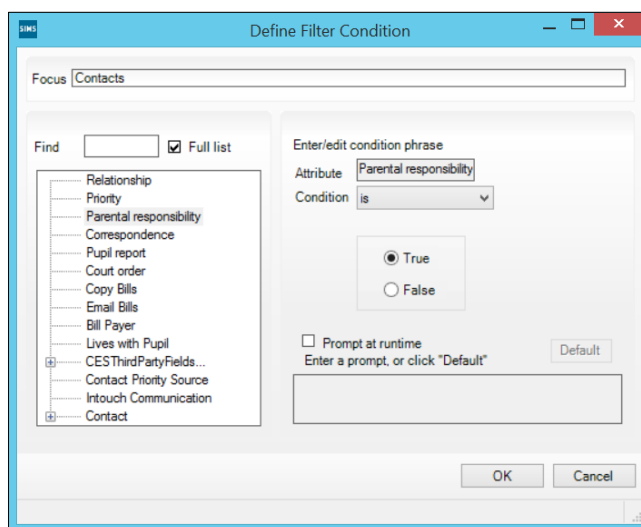
35. However you might only want **Priority 1** contacts, or Priory 1 and 2 contacts, or those with **Parental Responsibility**. **Close Word**.
36. In the report designer move to the **Data Fields** step and click the **Contacts** sub-report blue table and if necessary click on the red book in the right margin to show the sub-report **Selection criteria** at the bottom.
37. Click **New** to display the **Define Filter Condition** dialog box, then select **Priority**.



Notice from the **Condition** drop down list you can choose **equals** (the default setting) if you want just Priory 1s (and enter 1 in the **Value** field). Or you could choose less than f if you want Priority 1s and 2s (and enter 3 in the **Value** field). Note that the latter would also pick up any blank priorities in addition as blank is read as zero. The **between** condition (and enter 1 and 2 in the **Value** fields) would get around that problem.



38. If you would rather filter for those contacts with **Parental responsibly**, select the field on the left and select **True**.



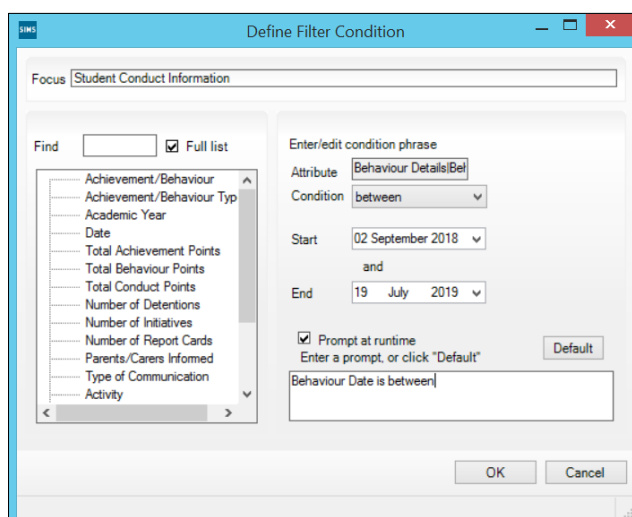
39. Click **OK**.
40. **Save** the design and **Run** for the same year group. Depending on the filter you opted for you should only see contacts with matching criteria.

Scenario – Behaviour Report

You have been asked for a report on classroom behaviours to show a count of **Disruptive behaviour in class** and a separate count of **Inadequate work in class** recorded last year, by year and/or registration group.

Step by Step – Producing a Behaviour Report

1. **Create a new report** based on **Students On roll**.
2. Select the field **Name & Reg**.
3. Select the **Student Conduct Information** sub-report.
4. Using the **Sub-report settings** (red book) add a filter by date for the incidents by clicking **New** to display the **Define Filter Condition** dialog box. Expand **Behaviour Details** and select the **Behaviour Date**. Ensuring that the **Condition** is set to **between**, amend the **Start** to the beginning of last year and set the **End** to the end of the year. Select the **Prompt at runtime** checkbox so it can be run again in the future for any date range. Click **OK**.



- Click **And** to add another filter condition. Expand **Behaviour Details** and select the **Behaviour Type** field. Ensure **Condition** is set to **is one of** and select **Disruptive behaviour in class**. Click **OK**.

- Preview** the report.

Student	Count
Chris Aaron 8A	2
Jason Aaron 8B	0
Liz Aaron 8C	0
Sophie Aaron 8D	0
Graham Abbess 11A	1
Sean Abbey 11B	0
Stan Ackton G	0
Stephen Ackton 8E	0
Jordan Acton 10F	2
Samantha Acton 11A	3
Adam Adams 9A	2
George Adams 10B	0
Mohammed Adasheji 8F	0
Emmanuel Adebayi 10F	0
Alexis Affleck K	0
Paolo Aloia N	0
Sabrina Alsop 7B	0
Goss Amelia 8F	0
Kan Americana 10D	0
Harold Anis 8E	0
Tarak Ammar 7C	0
Rachael Amos 10E	0
Siv Amoso 11A	0
Ethan Anderson 10F	3
Jasmine Andrews 10F	0
Maya Andrews 7D	0
Paul Andrews 11F	0
Wyatt Andrews 7E	0

- Notice the column header says **Count**. It would be more useful if we knew what it was a count of. Click on **Design**.
- Add the caption of **Disruptive**.
- This process from step 3 should be repeated for the behaviour type **Inadequate Work in Class** but can be simplified by using **Duplicate Sub Report** in the right margin.



Duplicate Sub Report

- Click **Duplicate Sub Report** to create an exact copy of the of the first sub-report.
- With the lower of the two **Student Conduct Information** sub-reports highlighted, select the filter for **Behaviour Type** and click **Modify**. Remove the tick from **Disruptive behaviour in class** and instead select **Inadequate Work in Class**.

12. Click **OK** and remember to change the caption to **Inadequate Work**.

13. Preview the report to check it's working the way intended.

Student	Disruptive	Inadequate Work
Chris Aaron 8A	2	2
Jason Aaron 8B	0	0
Liz Aaron 8C	0	0
Sophie Aaron 8D	0	0
Graham Abbess 11A	1	0
Sean Abbey 11B	0	0
Stan Ackton G	0	0
Stephen Ackton 8E	0	0
Jordan Acton 10F	2	2
Samantha Acton 11A	3	5
Adam Adams 9A	2	2
George Adams 10B	0	0
Mohammed Adasheji 8F	0	0
Emmanuel Adebayi 10F	0	0
Alexis Affleck K	0	0
Paolo Aloia N	0	0
Sabrina Alsop 7B	0	0
Goss Amelia 8F	0	0
Karl Americana 10D	0	0
Harold Amis 8E	0	0
Tarak Amnar 7C	0	0
Rachael Amos 10E	0	0
Silv Amoso 11A	0	0
Ethan Anderson 10F	3	1
Jasmine Andrews 10F	0	0
Maya Andrews 7D	0	0
Paul Andrews 11F	0	0
Wyatt Andrews 7E	0	0
Tina Angel 8D	0	0

At the moment the report runs for every student in the school but we want to run it for a specific year or registration group.

14. Click **Design** to return to the report designer and move to the filter step of the wizard.

15. Click **New** and select **Year Group**, ensure that **is one of** is selected from the **Condition** drop-down, select the **Prompt at runtime** checkbox, click **OK**.
16. Click **And**, select **Reg Group** and ensure that **is one of** is selected from the **Condition** drop-down list. Select the **Prompt at runtime** checkbox, click **OK** and click **Next**.
17. Click **Next** until the **Output** section is displayed or click **Default Output**.
18. Click **Word List Report** in the **Presentation** panel and select **User-Defined Template** on the right-hand panel. From the list shown in the **Program Files\Sims\Sims.net** folder, select the **School Header** template file and click **Open**.
19. Click **Save** to attach the template to the report and close Word.
20. Enter a title for the report of **Classroom Behaviour**.

Enter required settings for report output types	
Report Title	Classroom Behaviour
Suppress duplicates	☒

21. **Save** the report design as **Count of Classroom Behaviours**, deselect **Private**.
22. **Run** the report for any group(s).
23. Having examined the output in Word, close Word and the report in SIMS – without saving again.

Activity – Request for SEN Review Information

The new special needs co-ordinator has asked for a list of all special education needs (SEN) reviews in which pupils have taken part, and wants to be able to select a specific year group or registration group.

Activity – Request for Pupil Premium Information

The school business manager has asked for a list of all pupils who are receiving the Looked After Pupil Premium Funding Type.

NOTE: Expand Additional Information to find the Pupil Premium Funding Source sub-report.

04

Rich Text Format

This chapter contains:

Chapter Introduction	27
Scenario – Registration Group Lists per Page	28
Step by Step – Using RTF to Specify a Page Break	28
Scenario – Request for Letters to Update Contact Information	30
Step by Step – Multiple Records (One-to-Many Relationships)	30
Scenario – Setting up Templates with Columns in Place	35
Step by Step – Create a RTF Template with Three Columns	35
Scenario – Editing the Data Collection Sheet	39
Step by Step – Editing a RTF Design Report	40
Scenario – Creating a Photo Pass	42
Step by Step – Creating a RTF Design	42
Scenario – Lists of Classes per Pupil for Parents' Evening (Secondary Only)	44
Step by Step – Student Class Lists for a Subject	44
Activity – Grouping Fields per Page	45
Activity – Creating a Letter Listing Behaviour Incidents	45

Chapter Introduction

Rich text format (RTF) is more powerful than mail merge and also operates through Microsoft Word. The main reason for using RTF over Word is that it can deal with one to many relationships in mail merges.

Multiple Record Set

RTF Reports enable the results from sub-reports to be displayed correctly.

If the report includes a related multiple record set, such as a list of the classes for each pupil, you can display this information in a table.

Microsoft Word cannot handle multiple record sets in a mail merge. As an example, if you were creating personalised letters to parents regarding their child's medical conditions, and the child has more than one medical condition, Word would only insert the first medical record. Creating the document using rich text format we can insert a table of medical conditions that would grow in rows depending on how many medical records a student has.

This is done by adding a table to the template and putting the <report> sub-report fields in the appropriate columns. When SIMS finds the related fields, it will repeat the row for each record held against the sub-report field.

Personal Pronouns

In addition, RFT also enables you to easily insert personal pronouns such as:

- <he/she>
- <his/her>
- <him/her>
- <his/hers>
- <His/Her>
- <He/She>.

Although this can be done using mail merges to Word, in Word it involves creating a rule in your document everywhere you need the appropriate pronoun.

NOTE: The Gender field should be selected in the data fields section of the report for the above to be available in RTF mail merges.

You do not have to use the Gender field itself in the text of your merged documents.

(This is true as well if creating Rules in Word.)

Inserting page breaks by Groupings

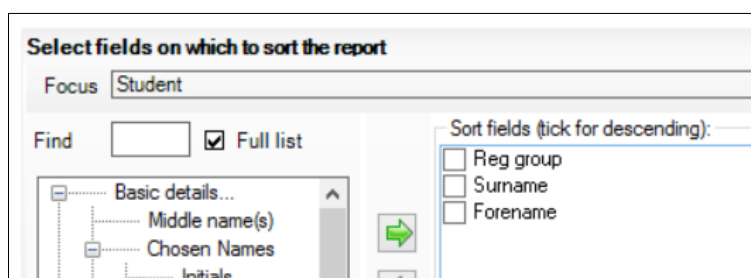
In your report design you can specify sort orders which has the effect of grouping data together and list in numerical or alphabetical order, for example students in name order by registration group. If you want to insert a page break in between registration groups, this cannot be done in Word but it can be done using RTF. See our first Step by Step

Scenario – Registration Group Lists per Page

A request has been made for a registration group list complete with ethnic information. The member of staff wants to have each registration group on separate pages and to be able to run the report for a selected year group.

Step by Step – Using RTF to Specify a Page Break

1. **Create a new report** based on **Students On Roll**.
2. Select the **Surname, Forename, Gender, Ethnicity** and **Reg Group** fields.
3. Create a runtime filter on **Year Group**.
4. Define the primary sort order of **Reg Group** followed by **Surname** and **Forename**.



5. On the **Define Presentations** step of the report design, select **Form Report (RTF)** from the **Define Presentation** panel.
6. In the right-hand side of the **Form Report (RTF) Settings** panel select the template **Standard Portrait** and select the **Reg Group** checkbox in the **Page Breaks** section.

7. If you want the report to have a border, select the **Use Border** checkbox.

Define presentations

Here you can design the settings for the different types of output
Select the presentation for the report

Presentation

- Word List Report
- Word Mailmerge
- Form Report (RTF)**
- Excel
- Web page
- Text
- Analysis

☐ Allow choice of output at run-time

<< Back Next >> Finish

Report Summary

Report Name: Registration Group RTF
effective on: 29/07/2019

- **Data area:** Student - Population: On roll
- **Data Fields:** Surname, Forename, Gender, Ethnicity, Reg group
- **Filter Students** where:
Year group is [?] "Year group "
- **Sort Order:** Reg group, Surname, Forename, Legal Forename
- **Default Output:** Form Report (RTF)
Duplicates suppressed in complex reports
Report Title:

Enter required settings for report output types

Report Title: _____
Suppress duplicates: ☒

Form Report (RTF) Settings

Select a Rich Text Format template to be used for this report:

- ☒ Standard Portrait ☐ Show Numeric dates **29 Jul 2019**
- ☐ Standard Landscape
- ☐ User-defined template

☒ When editing user-defined templates, use Word with macro support: field names
☐ Allow selection of template to be made at run-time

☒ Use Border

Page breaks

The following fields have been selected to sort on. They are therefore available for page breaking. You may select one or many of these to break up the report.

- ☒ RegGroup
- ☐ Surname
- ☐ ChosenName

Use RTF output if you want more flexible control of the report.
You can present the result as a simple table, or as a form report. Sub-tables and report inserts are also available.

The standard templates are stored locally and can be edited to suit your requirements.

See the on-line help for full instructions.

8. **Save** the report as **Registration Group RTF**, deselect the **Private** checkbox and click **OK**.
9. **Run** the report for any year group.
10. Notice the page break between registration groups.

Surname	Forename	Gender	Ethnicity	Reg
Adams	Adam	M	White - English	10A
Biggs	Davin	F	Black - Ghanaian	10A
Black	Shaun	F	White - English	10A
Danny	Abe	F	White - English	10A
Daskalos	Carla	M	Greek Cypriot	10A
Evans	Frankie	M	White - English	10A
Evans	Michael	M	White - English	10A
Gafferty	Felix	M	White - English	10A
Gallagher	Kingston	M	White - English	10A
Hackett	Charlie	M	White - Scottish	10A
Half	Penny	F	White - Welsh	10A
Hoxton	Kay	F	White - English	10A
Johnson	Nia	F	White - Welsh	10A
Johnston	Rick	M	White - English	10A
Lewis	Owen	M	White - English	10A
Ling	Xing	F	Asian and Chinese	10A
Oakley	Evan	M	White - English	10A
Orange	Aaron	M	White - English	10A
Reynolds	Henry	M	White - English	10A
Reynolds	Sally	F	White - Scottish	10A
Smitham	Jason	M	White - English	10A
Sole	Samie	F	White - English	10A
Timothy	Christian	M	Other Black	10A
Timpson	Harold	M	White - English	10A
Williams	Trevor	M	White - English	10A
Wong	Tilly	F	Hong Kong Chinese	10A

Page Break

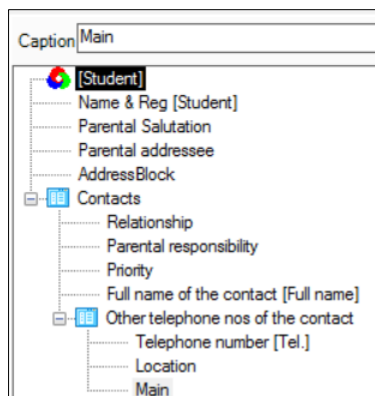
11. **Close Word**.

Scenario – Request for Letters to Update Contact Information

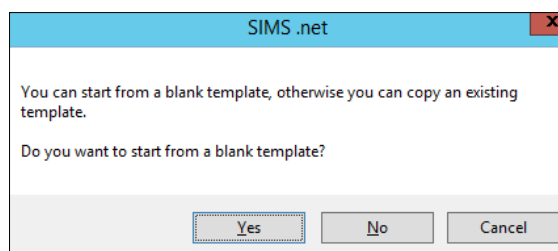
After recent incidents in school where contact details for a number of pupils were found to be incorrect, the head teacher wants a letter to be sent home to check the contact details of all pupils.

Step by Step – Multiple Records (One-to-Many Relationships)

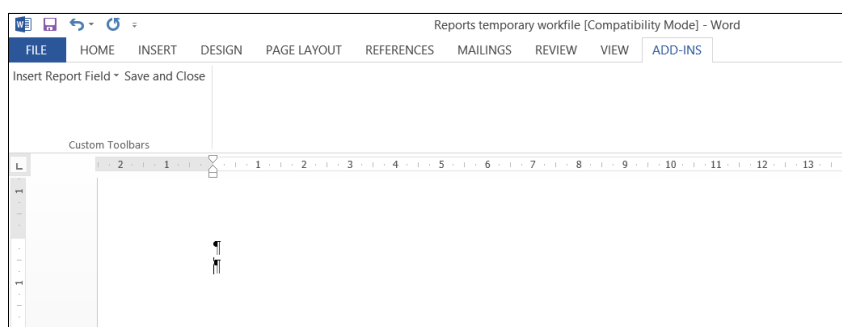
1. Create a new report based on **Students On Roll**.
2. Select the **Name & Reg** combined field, **Reg Group**, **Parental Salutation**, **Parental addressee**, **AddressBlock** fields.
3. Add the **Contacts** sub-report and select the **Relationship**, **Parental responsibility** and **Priority** fields.
4. Expand **Contact** and add the **Full name** field.
5. Expand **Contact Information** and add the **Other telephone nos** sub-report.
6. Add the **Telephone Number**, **Location** and **Main** fields.



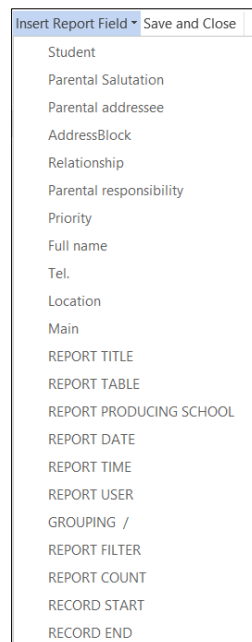
7. Add a runtime filter for **Year Group**.
8. Define the sort order of **Reg group**, **Surname** and **Forename** (both from **Chosen**).
9. Move to the **Define Presentation** step and select **Form Report RTF** from the **Presentation** pane on the left and select **User Defined Template** on the right.
10. In response to the question **Do you want to start from a blank template?** click **Yes**.



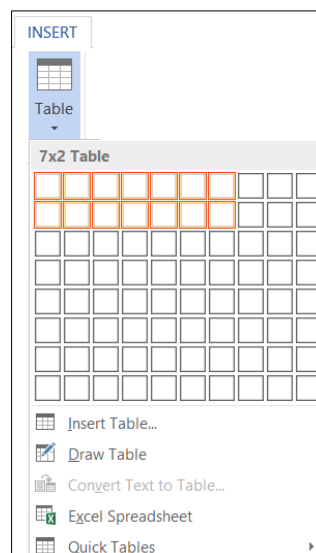
11. In Word, click **Enable the Macros/Enable Content**.



12. Click the **Layout** tab and check the paper size is set to **A4** and adjust the margins as required.
13. Click the **Add-ins** tab, ensure the cursor is on the top line of the document and select **Insert Report Field** to see a list of data fields from SIMS and other functional fields.



14. Select **RECORD START**. Leave the cursor on the same line, click **Insert Report Field** and select **REPORT DATE**.
15. Insert a few blank lines and in the same way insert **Parental addressee** and on the line underneath that insert the **AddressBlock**.
16. Leave a couple more blank lines then type **Dear** followed by a **space** followed by the **Parental Salutation** report field.
17. Leave a couple more blank lines then type **Reference:** followed by a **space** followed by the **Student** report field.
18. Leave a couple more blank lines then type **Please check and update the following details as necessary. Please send the form back to school by return.**
19. Leave a couple more blank lines then insert a table with **seven columns** and **two rows**.



In the top row of the table type in the headers of each column and in the second row insert the appropriate **Report Field**:

Contact Priority	Relationship to Student	Has Parental Responsibility	Name	Telephone Number	Device Type/ Location	Is main number for this contact
<Priority>	<Relationship>	<Parental responsibility>	<Full name>	<Tel.>	<Location>	<Main>

20. A line or two under the table type **Yours sincerely** and a leave space to insert a signature and type **Mr A Blacker** and directly underneath **Headteacher**.
21. A couple more lines under that insert a page break by pressing the **Ctrl + Enter**, and click **Insert Report Field** and insert **Record End**. This will be at the top of the new page.
22. Format the letter as necessary. Select the whole document using **Ctrl + A** to make sure it's all formatted with the same font and size. Apply shading and emphasis as required.

<RECORD-START><REPORT-DATE>

<Parental-addressee>

<AddressBlock>

Dear-<Parental-Salutation>

Reference:-<Student>

Please check and update the following details as necessary. Please send the form back to school by return.

Contact Priority	Relationship to Student	Has Parental Responsibility	Name	Telephone Number	Device Type/ Location	Is main number for this contact
<Priority>	<Relationship>	<Parental responsibility>	<Full name>	<Tel.>	<Location>	<Main>

Yours sincerely

Mr A Blacker

Headteacher

Page Break

Don't forget to insert **<RECORD END>** after the page break.

<RECORD END>

23. Click **Save and Close** on the **ADD-INS** tab.
24. You are returned to SIMS. Click **Save As** and save the report as **Contact Details Letter**. Deselect the **Private** checkbox and click **OK**.
25. Run the report for any year group.

01/10/2019

Mr H Adam and Mrs R Adams
5 Linden Road
Bedford
MK40 2DD

Dear Mr Adam and Mrs Adams

Reference: Adam Adams 10A

Please check and update the following details as necessary . Please send the form back to school by return.

Contact Priority	Relationship to Student	Has Parental Responsibility	Name	Telephone Number	Device Type/ Location	Is main number for this contact
1	Father	T	Mr Harry Adam	01632 412412	Home	T
				01632 557712	Work	F
1	Mother	F	Mrs Rebecca Adams	01632 412412	Home	F

Yours sincerely

Mr A Blacker
Headteacher

Notice as you scroll through the letters that the table has grown as necessary to accommodate the number of contact and the number of phones for each contact.

01/10/2019

Mr and Mrs A Biggar
161 Castle Road
Bedford
MK40 3RT

Dear Mr and Mrs Biggar

Reference: Davina Biggar 10A

Please check and update the following details as necessary . Please send the form back to school by return.

Contact Priority	Relationship to Student	Has Parental Responsibility	Name	Telephone Number	Device Type/ Location	Is main number for this contact
2	Father	T	Mr Ashley Biggar	01632 506909	Home	F
				07333 595099	Mobile	T
1	Mother	T	Mrs Kayleigh Biggar	01632 506909	Home	T
				07333 238239	Mobile	F

Yours sincerely

Mr A Blacker
Headteacher

26. Also notice that because **Suppress duplicates** is selected by default in the presentation step of the report designer, the first four columns of information are not repeated for the same contact. This can be deselected if preferred.

Enter required settings for report output types

Report Title

Suppress duplicates ☒

Form Report (RTF) Settings

Select a Rich Text Format template to be used for this report:

☐ Standard Portrait

☐ Standard Landscape

☒ User-defined template  Edit

☐ Show Numeric dates

29 Jul 2019

☒ When editing user-defined templates, use Word with macro support field names

☐ Allow selection of template to be made at run-time

☐ Use Border

Page breaks

The following fields have been selected to sort on. They are therefore available for page breaking. You may select one or many of these to break up the report.

☐ RegGroup

☐ Surname

☐ ChosenName

With knowledge gained from a previous Step by Step you could improve the presentation by sorting the contact into priority order. Plus, to aid parents in understanding the meaning of T and F in two of the columns in the table, we can edit the template so that the macro replaces the **T** and **F** with **Yes** and **No**.

27. Firstly go to the **Data Fields** step in the report designer, select the **Contacts** sub-report and open the **Selection Criteria** panel (red book).
28. Define a **Sort Order** of **Priority**.
29. Return to the **Presentation** step and click on **Edit**.

Form Report (RTF) Settings

Select a Rich Text Format template to be used for this report:

☐ Standard Portrait

☐ Standard Landscape

☒ User-defined template  Edit

☐ Show Numeric dates

15 Aug 2019

☒ When editing user-defined templates, use Word with macro support field names

☐ Allow selection of template to be made at run-time

☐ Use Border

30. In the second row of the table, within the **Parental responsibility Report Field**, insert your cursor at the end, but just inside the close angular bracket and type **Yes/No** so it looks as follows:

<Parental responsibility Yes/No>

The text before the slash will be inserted in place of the **T** for true records and the text after the slash will be inserted in place of the **F** for false records.

31. Do the same for the **Main** phone number report field:

<Main Yes/No>

32. Click **Save and Close** on the **ADD-INS** tab.

33. Click **Save** in SIMS and run the report again.

Mr and Mrs A Biggar
161 Castle Road
Bedford
MK40 3RT

Dear Mr and Mrs Biggar

Reference: Davina Biggar 10A

Please check and update the following details as necessary . Please send the form back to school by return.

Contact Priority	Relationship to Student	Has Parental Responsibility	Name	Telephone Number	Device Type/ Location	Is main number for this contact
1	Mother	Yes	Mrs Kayleigh Biggar	01632 506909	Home	Yes
				07333 238239	Mobile	No
2	Father	Yes	Mr Ashley Biggar	01632 506909	Home	No
				07333 595099	Mobile	Yes

Yours sincerely

Mr A Blacker
Headteacher

Scenario – Setting up Templates with Columns in Place

You have been asked to create some RTF templates with columns already in place, so that when creating reports you only have to insert the fields into columns to complete the design.

Step by Step – Create a RTF Template with Three Columns

1. Create a new report based on **Students On-roll**.
2. Select the **Name & Reg** field.
3. Move directly to the presentation step and select **Form Report (RTF)**, select **User Defined Template**. Click **Yes** to start from a blank template.

In Word design the templates as follows:

4. On the **Layout** tab set the paper size and margins to suit.
5. On the **Add-ins** tab from **Insert Report Fields** insert **<RECORD START>** on the top line.
6. On the next line from the **Insert** tab select **Table** and insert a table **3** columns by **2** rows
7. On the next line under the table from the **Add-ins** tab insert **<RECORD END>**.

Reports temporary workfile [Compatibility Mode] - Word

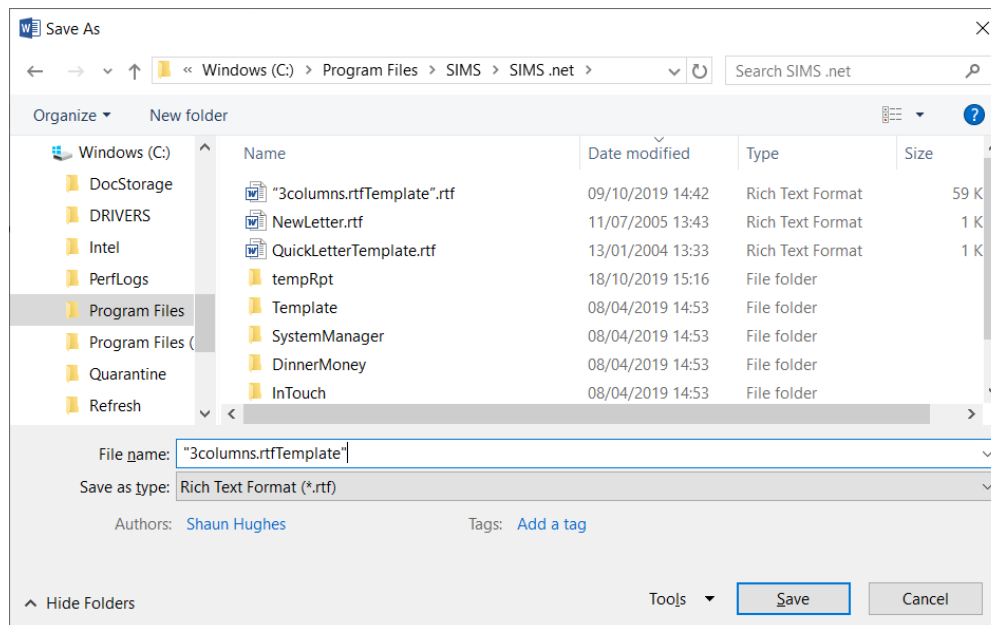
FILE HOME INSERT DESIGN PAGE LAYOUT REFERENCES MAILINGS REVIEW VIEW ADD-INS

Insert Report Field - Save and Close

Custom Toolbars

<RECORD START>		
<RECORD END>		

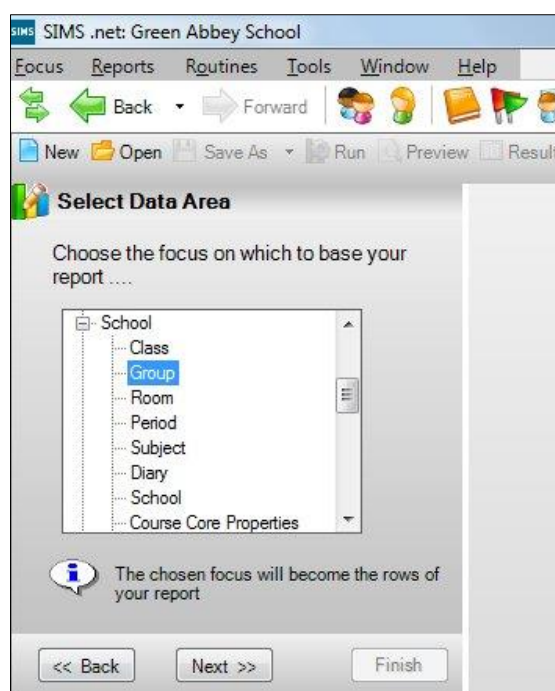
8. Ensure there is one blank line under the **<RECORD END>** report field. Switching on the **Show/Hide** tool from the **Home** tab may assist. 
9. Select **File | Save As** and if necessary move to the **SIMS.net** folder (usually **C:\Program files\Sims\Sims.net**). Name the template **"3columns.rtfTemplate"**. Ensure that the name is within speech marks as this ensures that the file is saved as a RTF template rather than a Word file. Set the type to **Rich Text Format**.



10. Click **Save**.
11. Close Word.
12. In SIMS close the report design without saving.

The template will now be used to produce a report that lists pupils' dietary needs. This report could also be used for special needs or any other group as the report is going to start from the **Group** focus area.

13. **Create a new report.** Expand **School** and select **Group** from the **Select Data Area** list.



14. Add the **Group and Teacher** field and select the **Students** sub-report.
15. Expand **Student | Basic Details** and select **Surname, Forename** and **Date of Birth**.
16. Click on the **Students** sub-report blue icon and after clicking the **Red book** put in a **Students** sub-report filter of **Year Group** and select the **Prompt at runtime** checkbox. Define a sub-report sort of **Surname** and **Legal Forename**.
17. Deselect the **Include records with no such members** checkbox.

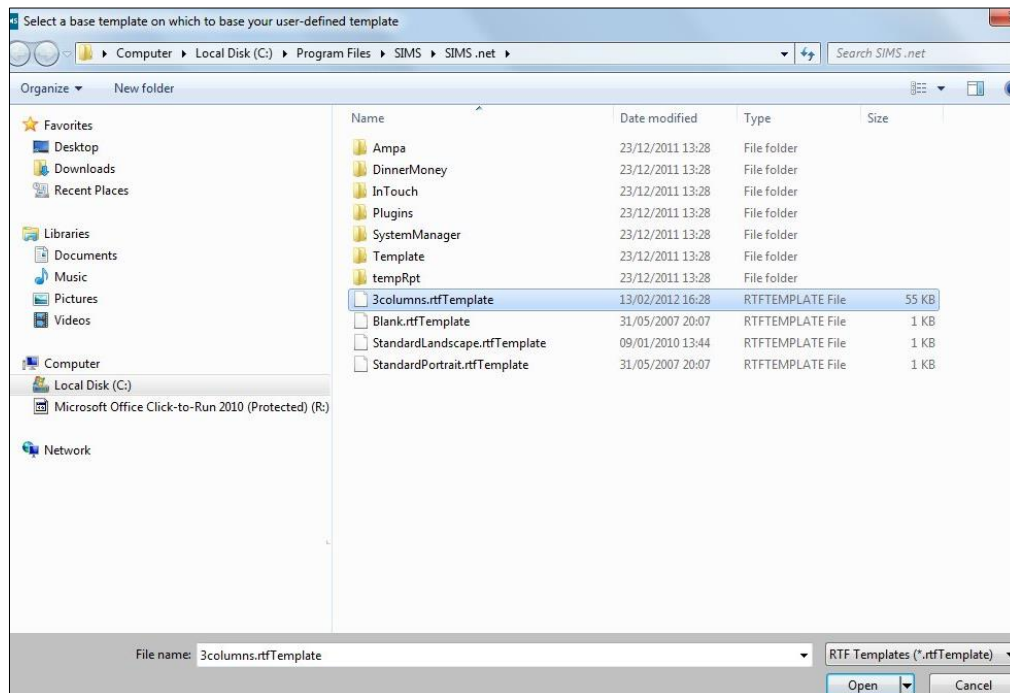
The screenshot shows a software interface for configuring a sub-report. The main area displays a tree structure with 'Group and Teacher' and 'Students filtered'. Below this, the 'Related member' section shows a selection criteria of 'member where Year group of the student is [?] Year group'. The 'Sort order' is set to 'Student\Surname, Student\Forename'. At the bottom, there are checkboxes for 'Include records with no such member' (unchecked) and 'Display first record only'.

18. Go to the **Apply Filter** step. Click **New**, select **Group type**, ensure that **is one of** is selected from the **Condition** drop-down list and select the **Prompt at runtime** checkbox. Click **OK**.

The screenshot shows a 'Define Filter Condition' dialog box. The 'Focus' is set to 'Group'. The 'Find' list on the left shows 'Group type' selected. The 'Enter/edit condition phrase' section on the right shows 'Attribute: Group type' and 'Condition: is one of'. Below this, there are buttons for 'Select All', 'Clear All', and 'Show All'. A list of values is shown: '[blank]', 'Assessment User Defined', 'Attendance User Defined', and 'Boarder Status'. The 'Prompt at runtime' checkbox is checked, and a text box below it contains 'Group type'. At the bottom are 'OK' and 'Cancel' buttons.

19. In the **Define Sort Order** step, select **Group Name**.
20. Click **Next** to display the **Specify effective date** step. Select the **Supply the Effective Date at run time** checkbox. Click **Next**.

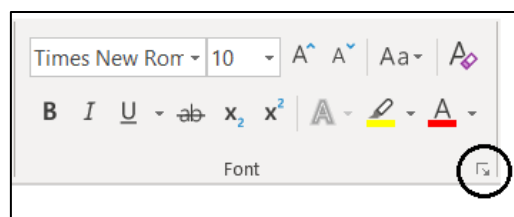
21. In the **Define Presentation** step, select **Form Report RTF** and then select **User Defined Template**. Do not start from a blank template so click **No** when asked. Select the **3columns.rtfTemplate** template we created above.



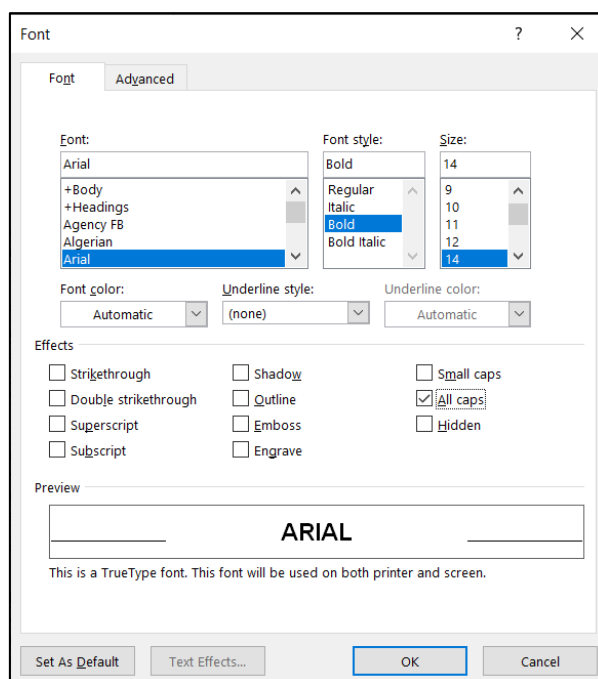
22. In Word, immediately next to the **<RECORD START>** report field insert **<Group and Teacher>** from the **Insert Report Field** list.
23. Enter the required details into the first row to make column headings and insert the report fields into the second row by selecting them from **Insert Report Field**.

Surname	Forename	DOB
<Surname>	<Forename>	<DOB>

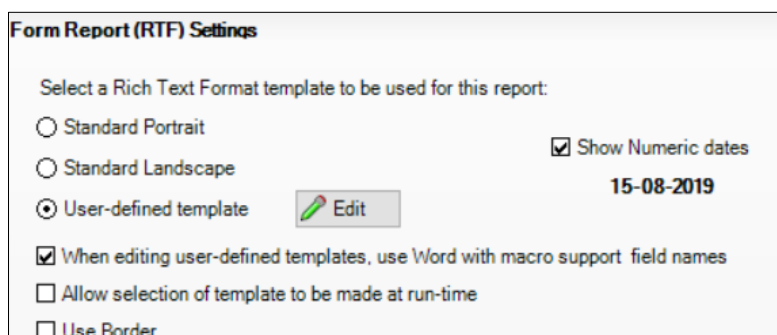
24. Format the table as required with font style and size, shading and emboldening.
25. Select the merge field including the angular brackets **<Group and Teacher>**. Select a font and increase the font size to 14, embolden and on the **Font** ribbon click on the button in the bottom right corner to open the **Font** dialog.



26. From the **Effects** section select **All caps**. Click **OK**.



27. Click **Save and Close** to return to SIMS.
28. Decide whether to use numeric dates for the **Date of Birth** by selecting the **Show Numeric Dates** checkbox.



29. Save the report as **Group List**, deselecting the **Private** checkbox.
30. Click **Run**, select one or more year groups in the **Year Groups** panel (do not select the **[blank]** year group or use the filter bypass) and select the **Dietary Needs** checkbox in the **Group Type** panel. Click **OK**.
31. Notice the dietary need above each table is in capitals and formatted in bold. Having looked at the output close Word.
32. Run the report again, this time deselect the **Dietary Needs** checkbox and select the **SEN Status** checkbox.
33. Review the output in Word then close the document.
34. Click **Close** in SIMS without saving changes to the report design to return to the SIMS Home Page.

The same template can be used for many requirements.

Scenario – Editing the Data Collection Sheet

You have been asked to change the existing data collection sheet in relation to the format of the date of birth and to also add a translator required field.

Logical Fields

Logical fields by default return true or false, but these can be replaced with any two alternatives, for example <translator required>. If used in a RTF template enter **<Translator required (Translator required/Translator not required)>**. Anything put in the brackets will be displayed in place of true/false.

Formatting Dates

It is possible to add a formatting string after a date, for example, <student><DOB dd-MM-yy> would display Ben Abbott 27-05-07.

y = Year	dddd = Monday
M = Month	ddd = Mon
d = Day	dd = 01
h = Hours	d = 01
m = Minutes	MMMM = January
s = Seconds	MMM = Jan
MM = 01	M = 1

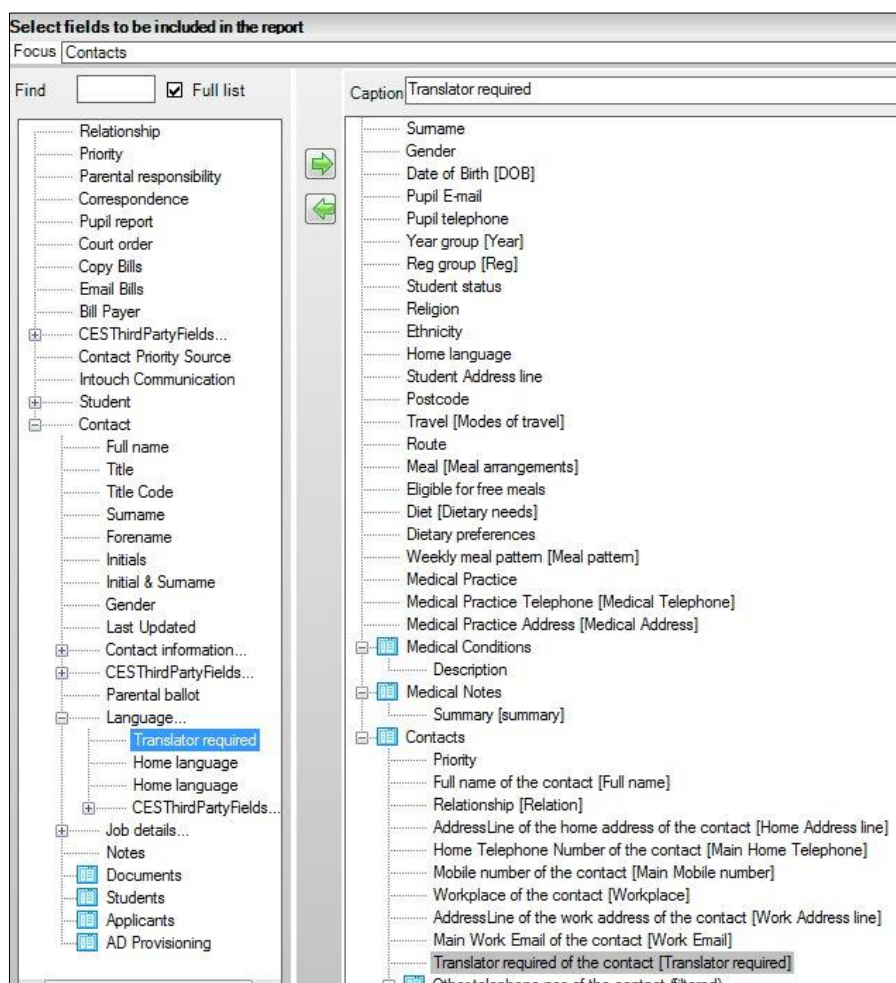
The time components will only result in zeros for a date of birth, but can be used to display the time at which an event occurs.

For example, <review date (hh:mm)> returns only the time section of the date, for example, 14:35.

Step by Step – Editing a RTF Design Report

1. In **Design Reports** click **Open an existing report** to display the **Open Report** dialog box. Expand **Focus**, select the **Data Collection Sheet** folder and select the **Data Collection Sheet** report. Click **OK**.

- From the selected fields for the report in the panel on the right, select the **Contacts** sub-report to see the list of available fields on the left. Expand **Contact**, expand **Language** and select **Translator required**.



- From the **Define Presentation** screen select **Form Report RTF** as the **Presentation** and click **Edit**.
- From the **Layout** tab check the page size and change to **A4** if necessary.
- In Word on the template edit **<DOB>** to **<DOB dd-MM-yy>**.
- Underneath **<Full Name>**, **<Relation>** enter **<Translator required>** from **Insert Report Fields** and enter inside the right-hand angular bracket **(Translator required/Translator not required)**:
<Translator required(Translator required/Translator not required)>

<RECORD START> <REPORT TITLE>			
Please check that the information below is correct. Complete any missing details, and return to the school office.			
Surname:	<Surname>	Legal Surname:	<Legal surname>
Forename:	<Forename>	Middle name:	<Middle name>
Chosen name:	<Chosen name>	Gender:	<Gender>
Date of Birth:	<DOB dd-MM-yy>	Year:	<Year>
Address:	<Student Address line>		
Post Code:	<Postcode>		
Telephone:	<Pupil telephone>		
Email:	<Pupil E-mail>		
Please give details of all persons who have parental responsibility and anyone else you wish to be contacted in an emergency. Place them in the order that you wish for them to be contacted in an emergency.			
Priority	Name/Relationship	Home Address/Phone/Mobile/Fax	Work Address/Phone/Email
<Priority>	<Full name>, <Relation>	<Home Address line>	<Workplace> <Work Address line>
	<Translator required	Tel: <Main Home Telephone>	Tel: <Tel.>
	(Translator required/Translator not required)>	Mobile: <Main Mobile number>	Email: <Work Email>
Travel Arrangements <Modes of travel>			
If the above information is incorrect, please tick the appropriate choice			

7. Click **Save and Close** to return to SIMS.
8. Click **Save As** in SIMS and name the report **Data Sheet with Translator**.
9. Click **Run** for a registration group and see if the date of birth looks correct and the **Translator required** flag is displayed correctly.
10. Click **Close**.
11. Click **Close** in SIMS without saving changes to the report to return to the SIMS Home Page.

Scenario – Creating a Photo Pass

You have been asked to design a photo pass for pupils who are eligible for free meals.

Using Photos in a RTF Report

The <photo> field can be used in RTF reports. You may wish to use a percentage after the field, for example <photo(80%)> will produce the photo at 80% of the size. You can also specify an exact size, for example, <photo(120x160)> would produce the photo at 120 by 160 pixels.

Step by Step – Creating a RTF Design

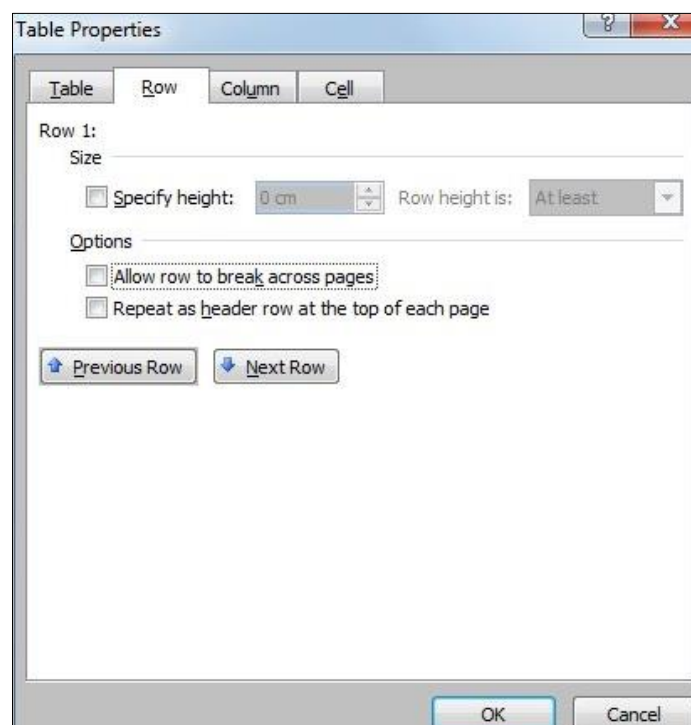
1. **Create a new report** based on **Students On roll**.
2. Select the **Surname**, **Forename**, **Photo** and **Reg Group** fields.
3. Create a **Prompt at runtime** filter based on **Reg Group**.
4. Click **And** (underneath **Define Filter**) to create a second filter, select **Eligible for Free Meals**, select **True** from the **Condition** drop-down list and click **OK**.
5. Define a sort order of **Reg Group**.
6. Select **Form Report (RTF)** from **Presentation**, using a **User defined template** and select a blank template.
7. In Word, check the page settings on the **Layout** tab.
8. At the start of the document insert **RECORD START** from **Insert Report Field**.
9. Select **Insert | Table | Insert Table** and select **2 Columns by 1 Row**.

10. In top left cell enter a **blank line**, enter the **Name of School**, enter **blank line** and **Meal Pass**, enter a **blank line** and click **Insert Report Field**. Select the **Forename** and **Surname** fields, enter a **blank line** and insert the **Reg Group** field.
11. Centre all the text.
12. In the right-hand cell put the **Photo** field in **Insert Report Fields**. Centre the photo. If you want to size the photo you can do so by adding a percentage, for example `<photo(70%)>`.

<RECORD START>	
Green Abbey School	<Photo(70%)>
Meal Pass	
<Forename> <Surname>	
<Reg>	
<RECORD END>	

The size of the table can be adjusted as required.

13. Click in the left-hand cell and right-click, select **Table Properties** and under the **Row** tab deselect the **Allow row to break across pages** checkbox and click **OK**.



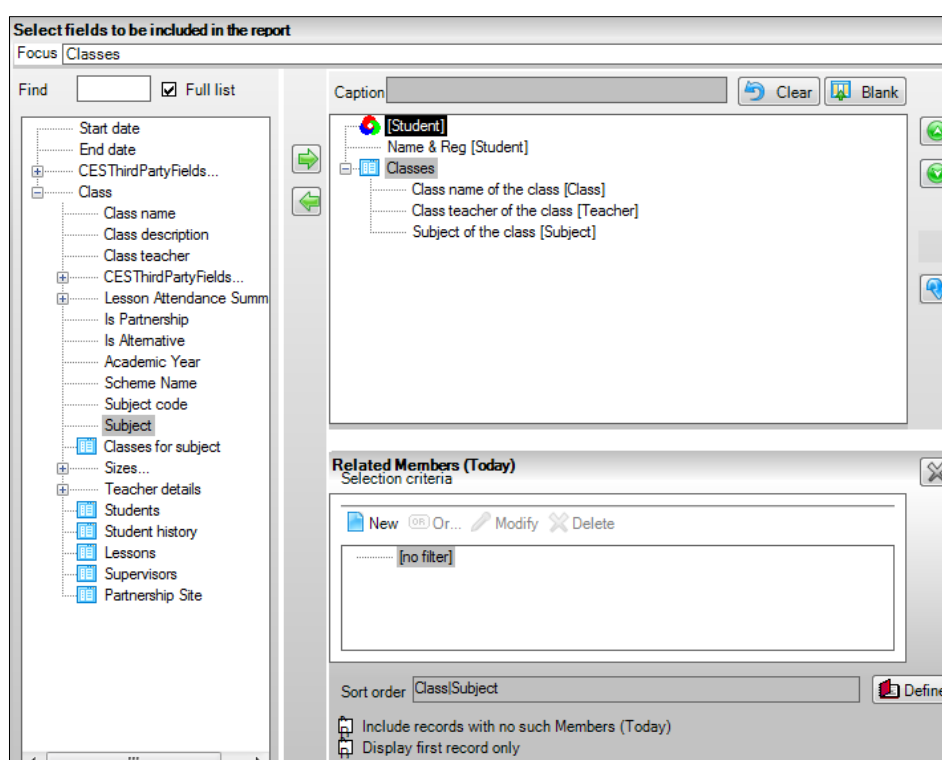
14. Underneath the table **Insert Record End** and click **Save and Close**.
15. Save the report in SIMS as **Photo Card**, deselecting the **Private**.
16. Run the report for a registration group.
17. If the design needs to be edited to have the maximum amount on one page, click **Close** in Word and click **Edit** on the **Presentation** screen in SIMS. Amend as required and click **Save and Close**.
18. Click **Close**.
19. Click **Close** in SIMS without saving changes to the report to return to the SIMS Home Page.

Scenario – Lists of Classes per Pupil for Parents' Evening (Secondary Only)

You have been asked to produce a list of classes, teachers and subjects for each pupil as a way of preparing for a year 10 parents' evening.

Step by Step – Student Class Lists for a Subject

1. Select **Reports | Design Report**, click the **Create a new report**. Click **Next** twice to select **Student** from the **Select Data Area** screen and **On-roll** from the **Refine Data Area** screen.
2. Click **Next** to display **Select Data Fields** screen. Select **Name & Reg**, click the **Classes** sub-report, expand **Class** and select **Class Name**, **Class Teacher** and **Subject**.
3. Click the **Classes** sub-report (on the right-hand side) and click **Red book** to access the sub-report settings. The **Class** list needs to be sorted by subject, so click **Define**, expand **Class** and select **Subject** on the sub-report sort order. Click **OK**. Deselect the **Include records with no such members** checkbox.



4. Click **Next** to display the **Apply Filter** screen and add **Year Group**. Select the **Prompt at runtime** checkbox, click **And** selecting **Reg group**. Check the **Prompt at runtime** checkbox. Click **OK**.
5. Click **Next** to display the **Define Sort Order** screen. Select **Legal Surname** and **Legal Forename**. You need to define a sort order explicitly and not leave this as default, as a sub-report sort has been used.
6. Click **Next** to display the **Specify effective date** screen. Select the **Supply effective date at runtime** checkbox.
7. Click **Next** to display the **Define Presentation**, select **Form Report RTF** from the left-hand panel, select **User Defined Template** radio and start from a **blank** template.
8. In Word check the page settings on the **Layout** tab.
9. On the **Add-ins** tab, from **Insert Report Field** select **<RECORD START>**.
10. Press the **Enter** key.

11. Insert **<Student>**.
12. Press the **Enter** key.
13. Select **Insert Table | Insert Table**, type **3** in the **Number of Columns** field and **2** in the **Number of Rows** fields. Click **OK**.
14. In the top-left cell enter **Class Name** and underneath insert **<Class>** from **Insert Report Field**.
15. In the top-middle cell enter **Subject**, then underneath insert **<subject>** from **Insert Report Field**.
16. In the top-right cell enter **Teacher**, then underneath insert **<teacher>** from **Insert Report Field**.
17. Click underneath the table and insert **<RECORD END>**.

<RECORD START>		
+ <Student>		
Class Name	Subject	Teacher
<Class>	<Subject>	<Teacher>
<RECORD END>		

18. Click **Save and Close**.
19. Click **Save As** and save the report with a suitable name. Deselect the **Private** checkbox and click **OK**.
20. Run the report for a year group and a registration group.

Jordan Acton 10F		
Class Name	Subject	Teacher
CLS 10F		Mr D Newton
HCL Hooke		Mrs W Harris
10y/Bi1	Biology	
10y/Ch1	Chemistry	
10B/Co1	Computer Studies	Mr V Stockill
10y/En1	English	Mr S Green
10A/Fr1	French	Dr R Mcnamara
10C/Gg1	Geography	Mr A Simmons
10y/Ma1	Mathematics	Miss R Hatchett
10y/Pe3	Physical Ed	Mr B Kinross
10y/Ph1	Physics	
10F/Ps	PSE	
10y/Re3	Religious Ed	Mr A Blacker
George Adams 10B		
Class Name	Subject	Teacher
CLS 10B		Mr A Simmons
HCL Hooke		Mrs W Harris
10x/Bi1	Biology	Ms J Estaphan
10x/Ch1	Chemistry	Ms J Estaphan
10A/Dr1	Drama	Mr R Williams
10B/En1	Engineering	Mr P S Brown

21. Click **Close** in SIMS to return to the SIMS Home Page.

Activity – Grouping Fields per Page

You need to have a list of ethnicities for a specific year group. The list should be produced so that each ethnicity is on a new page in Word.

Activity – Creating a Letter Listing Behaviour Incidents

You would like to send a letter to parents with a list of behaviour incidents that have happened in the last year.

05

Report Inserts

This chapter contains:

Chapter Introduction	47
Scenario – Individual Conduct Report	47
Step by Step – Creating the First Report	48
Step by Step – Creating the Second Report	50

Chapter Introduction

An entire report can be inserted into another report, provided that it has been defined with an RTF Template. The inserted report must be for the same focus, for example Student. SIMS will ignore the selection filter defined for the inserted report and execute it for the current report. The details from this RTF report will be inserted into the final report.

To include a report insert at a given point, use the key <REPORT INSERT report name> (where report name is the name of the report to be inserted). If the report cannot be found, or is not the same focus area, or is not an RTF report, an error message is displayed.

NOTE: Report inserts will be necessarily slow, as each inserted report will have to be executed once for every item in the main report.

Scenario – Individual Conduct Report

The head teacher would like to distribute an individual report on behaviour and achievement at parents' evening. The first report will have the behaviour record on it. The report to be inserted will have the achievements on it. The finished report will be similar to the following graphic.

Behaviour and Achievement Record				
Name: <u>Grenetta</u> Abbey Reg: 8F Year: <u>Year 8</u>				
Behaviour				
Date	Type	Comment	Location	Action Taken
12 Sep 2011	Inadequate Work in Class	The maths department have identified these students as not performing to the best of their ability. In the first instance we have brought this to their attention and advised them of how to improve.	Classroom	Discussed with Pupil
10 Sep 2012	Not Equipped for Lesson	Are missing some items from their basic kit. They have one week to resolve this issue.	Tutor Base	Follow Up Date Set
10 Sep 2012	Fighting	What started as a playground game degenerated into a fight.	Playground	Referred to Leadership Group
07 Mar 2013	Bullying			
Achievements				
Type	Date	Award Given	Staff Name	
New Year Points Award	01 Sep 2011	Ment Points	Mr Blacker	
New Year Points Award	03 Sep 2012		Mr Blacker	
Bronze Award	07 Mar 2013		Mr Blacker	

The following graphics are examples of the two report templates.

Behaviour and Achievement Record

Name: <Name> Reg: <Reg> Year: <Year>

Behaviour

Date	Type	Comment	Location	Action Taken
<Behaviour Date>	<Behaviour Type>	<Comments>	<Location>	<Action Taken>

<REPORT INSERT Achievement>

The preceding report had the line <REPORT INSERT Achievement> added.

Achievement is the name of the following report, as shown in the graphic. This command inserts Achievement into the preceding report to produce the report on the previous page.

Inserted Report

<RECORD START>

Achievements

Type	Date	Award Given	Staff Name
<Achievement Type>	<Achievement Date>	<Award Given>	<Title> <Preferred Surname>

<RECORD END>

Step by Step – Creating the First Report

1. Create a new report based on **Students On Roll**.
2. The fields to be included in the report are: **Forename & Surname, Reg Group, Year Group**.
3. Navigate to the sub report for **Student Conduct Information** and expand **Behaviour Details** to select the following fields; **Behaviour Date, Behaviour Type, Comments, Location** and **Action Taken**.

Select fields to be included in the report

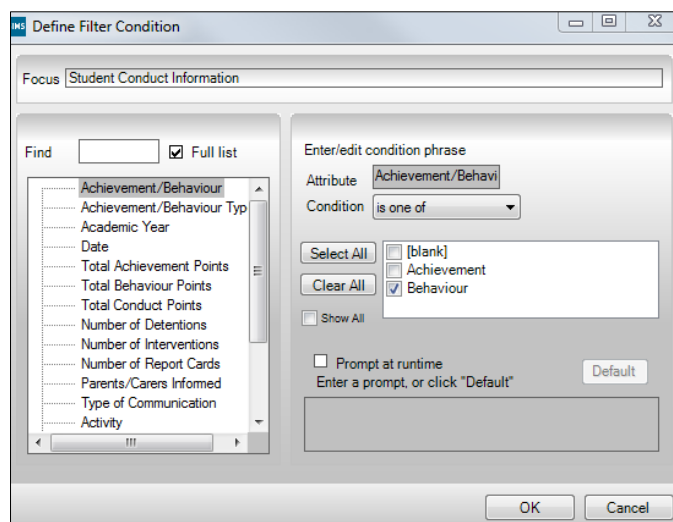
Focus: Student Conduct Information

Find: ☒ Full list

Caption: Action Taken

- Achievement/Behaviour - Achievement/Behaviour Type - Academic Year - Date - Total Achievement Points - Total Behaviour Points - Total Conduct Points - Number of Detentions - Number of Interventions - Number of Report Cards - Parents/Carers Informed - Type of Communication - Activity	[Student] - Forename & Surname [Name] - Reg group [Reg] - Year group [Year] - Student Conduct Information - Behaviour Date of the behaviour details [Behaviour Date] - Behaviour Type of the behaviour details [Behaviour Type] - Comments on the behaviour details [Comments] - Location of the behaviour details [Location] - Action Taken for the behaviour details [Action Taken]
---	--

4. Select the **Student Conduct Information** sub-report and click **Red book (sub-report settings)** to add a filter.
5. Click **New** in the box and select the **Achievement/Behaviour** field. On the right-hand side of this box tick **Behaviour** and select **OK**.



6. Untick the **Include records with no such Student conduct information** (which is just under the filter).
7. Click through the other steps of the wizard leaving the defaults until you are on the **Define Presentation/Default** output screen.
8. Select **Form Report RTF** and **User-defined template. Start from a blank template** when prompted.

NOTE: As the report is only being produced for individual pupils from the Links menu on the pupil record, you do not need to use RECORD START or RECORD END.

9. Check the page settings on the **Layout** tab.
10. At the top of the document type the centrally aligned heading **Behaviour and Achievement Record**.

Behaviour and Achievement Record

11. Underneath the heading enter the following by typing the prompt and selecting the appropriate merge field from **Insert Field** on the **Add-ins** tab:

Name: <Name> Reg: <Reg> Year: <Year>.

12. Centre align also.
13. Underneath type the sub-heading **Behaviour**. Left align.

Behaviour and Achievement Record

Name: <Name> Reg: <Reg> Year: <Year>

Behaviour

14. Below the Behaviour sub-heading insert a table, from the **Insert** tab, 5 columns by 2 rows.
15. In the top row of the table, type into each column the following; **Date, Type, Comment, Location** and **Action Taken**.
16. In the bottom row, select the relevant fields from **Insert Report Field** on the **Add-ins** tab.

Behaviour and Achievement Record

Name: <Name> Reg: <Reg> Year: <Year>

Behaviour

Date	Type	Comment	Location	Action Taken
<Behaviour Date>	<Behaviour Type>	<Comments>	<Location>	<Action Taken>

17. A few rows below the table, type in **<REPORT INSERT Achievement>**.

Behaviour and Achievement Record

Name: <Name> Reg: <Reg> Year: <Year>

Behaviour

Date	Type	Comment	Location	Action Taken
<Behaviour Date>	<Behaviour Type>	<Comments>	<Location>	<Action Taken>

<REPORT INSERT Achievement>

18. Select all text and change the font to **Arial**, size **10**. Format the table, emphasise the text and merge fields as required.
19. From the **Add-Ins** tab click **Save and Close** to return to SIMS.
20. In SIMS, select **Save As** and name the report **Behaviour & Achievement Info sheet**. Deselect the **Private** checkbox and click **OK**.
21. Click **Close**.

Step by Step – Creating the Second Report

1. **Create a New Report** based on **Students On Roll** in the **Refine Data Area** screen.
2. In the **Select Data Fields** screen navigate to the **Student Conduct Information** sub-report and expand **Achievement Details** to select the fields **Achievement Type**, **Achievement Date** and **Award Given**.

Select fields to be included in the report

Focus: Student Conduct Information

Find: ☒ Full list

Left pane (Available Fields):

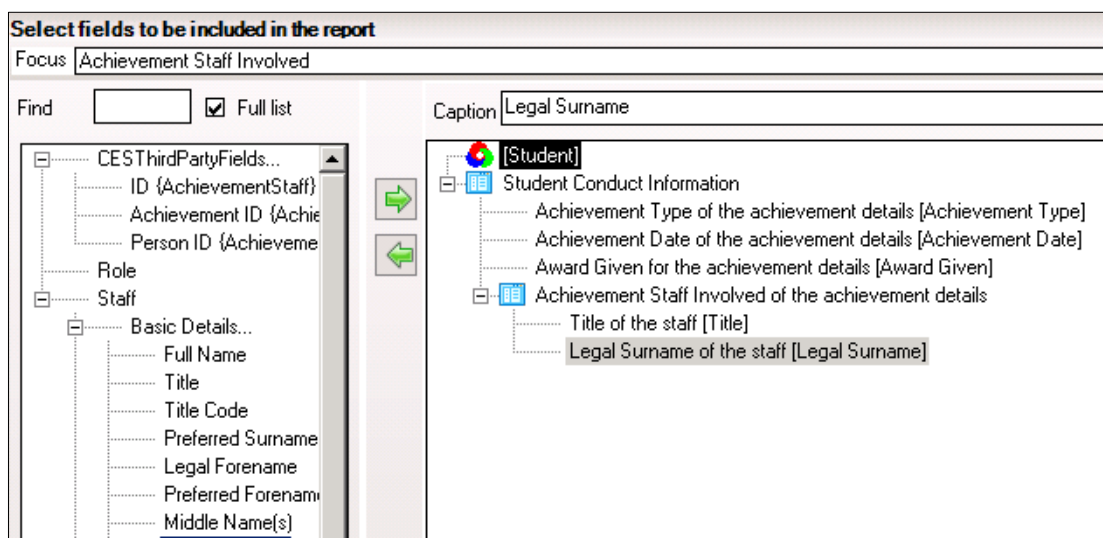
- Achievement/Behaviour
- Achievement/Behaviour Type
- Academic Year
- Date
- Total Achievement Points
- Total Behaviour Points
- Total Conduct Points

Right pane (Selected Fields):

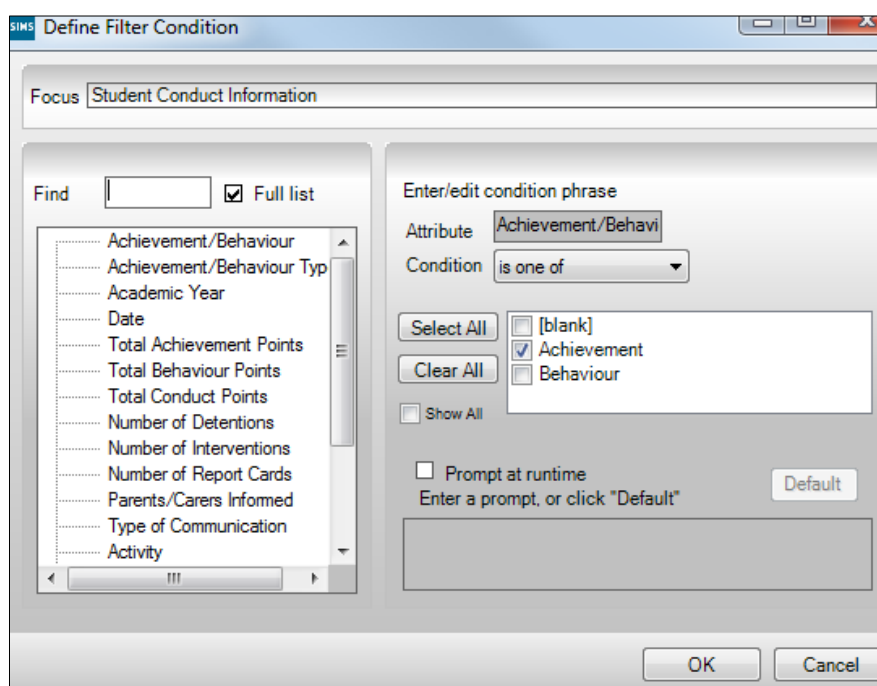
Student Conduct Information

- Achievement Type of the achievement details [Achievement Type]
- Achievement Date of the achievement details [Achievement Date]
- Award Given for the achievement details [Award Given]

3. Select the **Achievement Staff Involved** sub-report, expand **Staff** and select **Title** and **Legal Surname** fields from **Basic Details**.



4. Filter the **Student Conduct Information** sub-report so that it matches the following graphic.



6. Untick the **Include records with no such Student conduct information** (which is just under the filter).
7. Click through the other steps of the wizard leaving the defaults until you are on the **Define Presentation/Default** output screen.
8. Select **Form Report RTF, User Defined Template. Start from a blank template** when prompted.
9. Under the **Add Ins** tab insert **<RECORD START>** from **Insert Report Field**.
10. Underneath, type in **Achievements**.

```
<RECORD START>
Achievements
```


11. Under this insert a table: **4 Columns by 2 Rows**.
12. In the top row of the table, type into each column the following: **Type, Date, Award Given** and **Staff Name**.
13. In the second row of the table, insert the relevant fields from **Insert Report Field**.

<RECORD START> Achievements			
Type	Date	Award Given	Staff Name
<Achievement Type>	<Achievement Date>	<Award Given>	<Title> <Legal Surname>

14. Underneath the table insert **<RECORD END>**.

<RECORD START> Achievements			
Type	Date	Award Given	Staff Name
<Achievement Type>	<Achievement Date>	<Award Given>	<Title> <Legal Surname>
<RECORD END>			

22. Select all text and change the font to **Arial**, size **10**. Format the table, text and merge fields to match the first report.
15. Click **Save and Close** to return to SIMS.
16. In SIMS, click **Save As** and name the report **Achievement**. This must match the report name inserted in the report field **<REPORT INSERT Achievement>** at the bottom of the first report.
17. Open **Sean Abbey's** record in Green Abbey School or **Joshua Lowe's** record in Waters Edge School and from the **Links** menu select **Reports**. Find and run the first report – **Behaviour & Achievement Info Sheet**.

06

Reporting on User Defined Groups

This chapter contains:

Chapter Introduction	53
Scenario – Creating the Group	53
Step by Step – Creating the Group	53
Step by Step – Creating the User Defined Group Report	55

Chapter Introduction

User defined groups can be used to create groups of pupils and/or staff which have no bearing on any of the academic or pastoral groups within SIMS. Reports can also be created using these groups.

Scenario – Creating the Group

Selected pupils from year 7 are going on a trip to the Imperial War Museum in London. The school will need to send several letters home and the teacher in charge of the trip will need emergency contact details. Members of staff decide to create a user defined group to assist with this process.

Step by Step – Creating the Group

1. Select **Focus | Groups | User Defined Groups**.
2. Click **New**.
3. Type **Y7 Imperial War Museum** in the **Group Description** field.
4. Type **Y7IWM** in the **Short Name** field and make the group **Active**.

Maintain User Defined Groups

New Search Open Delete Print Browse Next Previous

User Group Details:

Save Undo Print

Group Details 2 Membership

1 Group Details

Group Description: Year 7 Imperial War Museum Active State: Active

Short Name: Y7IWM Current Main Supervisor: [Search]

Notes: [Text Area]

Include in Discover: ☐

Adding a Supervisor

- Click **field browser** (magnifying glass) located to the right of the **Current Main Supervisor** field and select **Action | Add Supervisor**.

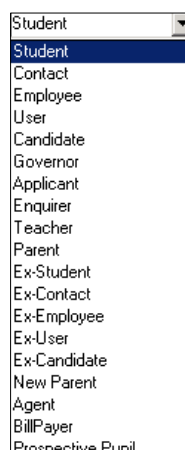
- Type **Abell** in the **Surname** field accept the **Role** default of **Employee** and click **Search**.

NOTE: Additional members of staff or parent helpers can also be allocated at this stage by clicking the role drop-down list and selecting a different category of person, although there can only be one main supervisor.

- Select **Mrs Anita Abell** and click **OK**.
- Select **Main Supervisor** from the **Supervisor Title** drop-down list and click **OK**. Click **OK** again to confirm the supervisor.

NOTE: The default date range is the whole academic year which can be edited if required.

9. From panel **2**, select **Action** and choose either **Add Student** or **Add Member**. If adding a member, the role of that person in SIMS can be selected from the **Role** drop-down list, as shown in the following graphic.

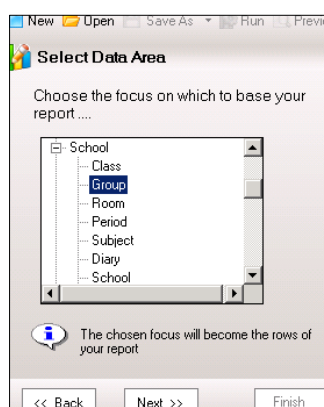


10. Select ten pupils from **Year 7** using the filters to help. Click **OK**.

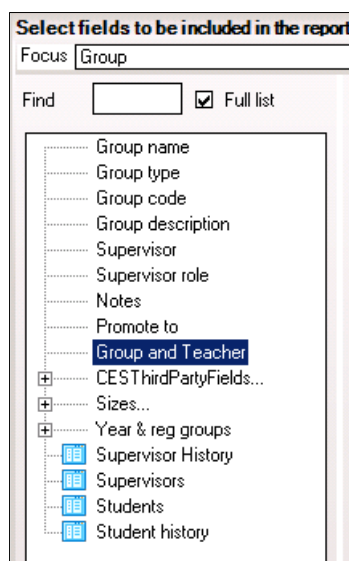
11. Click **Save** and close the **User Defined Group** window.

Step by Step – Creating the User Defined Group Report

1. Select **Create a New Report**.
2. In **Select Data Area**, expand **School** and select **Group** and click **Next**.

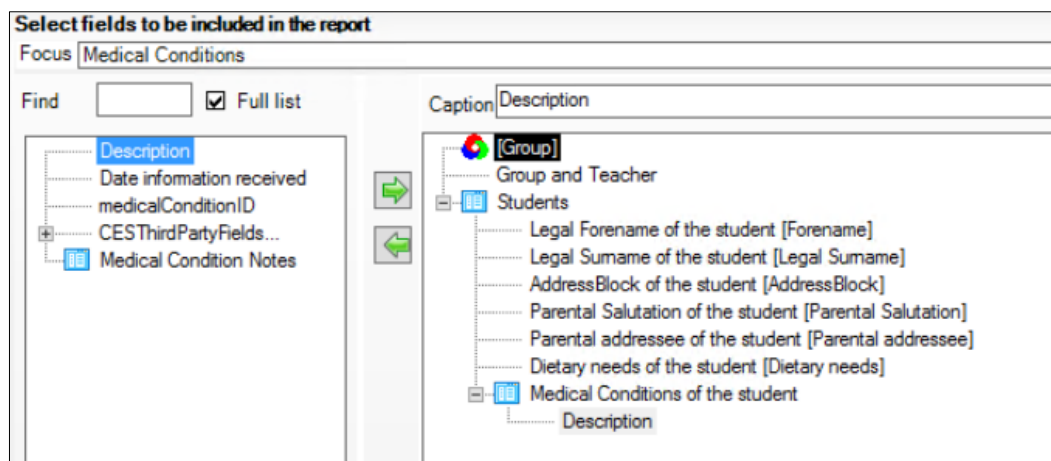


3. Select the **Group and Teacher** field.

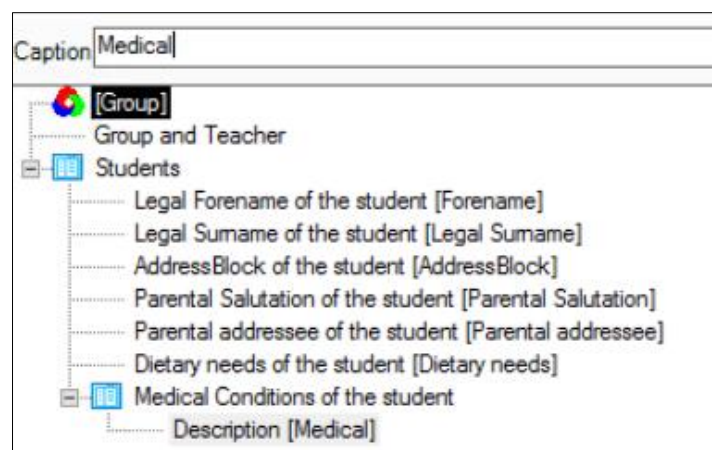


4. Select the **Students** sub-report.

5. From the **Students** sub-report select the fields, **Legal Forename**, **Legal Surname**, **AddressBlock**, **Parental Salutation**, **Parental Addressee**, **Dietary Needs**, **Medical Conditions** sub-report and **Description** from the **Medical Conditions** sub-report.

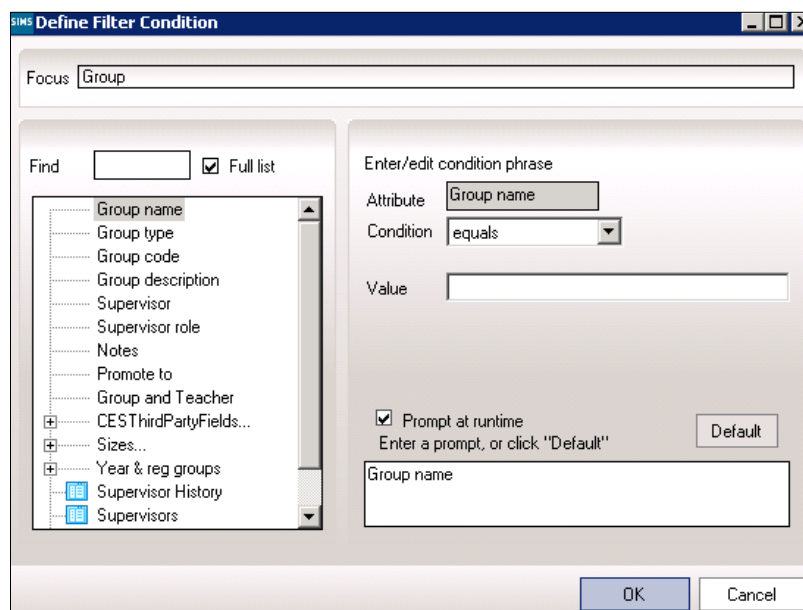


6. Highlight the **Description** field and click in the **Caption** box. Edit this to read **Medical**.



7. In the **Define filter** step click **New**.

8. Select **Group name** as the filter, leave the **Condition** as **equals** and select the **Prompt at runtime** checkbox. Click **OK**.



NOTE: Group Name is the field name for the Short name when the User Defined Group was set up.

9. In the presentation step select **Form Report RTF** and choose **User Defined Template**. Select **Yes** to **start from a blank template**.
12. Check the page setup on the **Layout** tab and change page size and margins to suit.
13. Select the **Add Ins** tab to see **Insert Report Field**.
14. Select **Group and Teacher** from the **Insert Report field**. Then type **Medical and Dietary Needs List**.

<Group and Teacher> Medical and Dietary Needs List

15. Select **Insert | Table** and Number of Columns **3**, Number of Rows **2**. Click **OK**.
16. Create column headers in the top row of the table of: **Name**, **Dietary Needs** and **Medical**.
17. In the second row of the table, insert the relevant fields from **Insert Report Field**.

<Group and Teacher> Medical and Dietary Needs List		
Name	Dietary Needs	Medical
<Forename> <Legal Surname>	<Dietary needs>	<Medical>

18. Click **Save and Close**.
19. In SIMS, select **Save As** and name the report **Y7 IWM trip Medical/Dietary Info**. Deselect the **Private** checkbox.

20. **Run** the report, using **Y7IWM** in the **Value** field. The following graphic is an example. Your own data may differ. View and close Word.

Y7 Imperial War Museum Mrs A Abell Medical and Dietary Needs List		
Name	Dietary Needs	Medical
Emily Coldman		Asthma
		Eczema
Robin Coppler	No dairy produce	
Sofia Romero		
Hermione Ryan		
Edward Cooper		
Zach Carlsen		
Laura Adams		
Gwenneth Astwick		
Steve Bond		Epilepsy
Martin Churchill		

07

Staff List Reports

This chapter contains:

Chapter Introduction	59
Scenario – Monitoring Staff Absences	59
Step by Step – Staff Absences Report	59

Chapter Introduction

Since school workforce census was introduced, schools have had to record more information about staff. With this in mind we will look at the staff focus.

Scenario – Monitoring Staff Absences

The head teacher is monitoring staff absences and would like a report to help with this process.

Step by Step – Staff Absences Report

1. **Create a new report** based on the **Staff** focus.
2. Select **Staff**, **all Current** from the **Refine Data Area** drop-down list.
3. Select the fields **Full Name** and **NI Number**. Expand **Absences** and add the **Absences** sub-report.
4. Add the **Absence Start Date**, **Absence End Date**, **Working Days Lost**, **Absence Type** and **Illness Category** fields.
5. With the **Absences** sub-report highlighted in the right panel, click the **Red book** to view the sub-report settings. Notice that the sort order is already in **Absence Start Date** order.

6. In the **Define Sort Order** step select a sort order of **Preferred surname, Legal forename**.
7. For the **Define Presentation** choose **Form Report (RTF)** and select **User Defined Template**. Start from a **blank** template.
8. In Word check the page setup on the **Layout** tab and change page size and margins as required.
9. On the **Add-ins** tab from **Insert Report Field** select **Record Start**.
10. On the next line insert the **Full Name** field.
11. On the next line insert the **NI Number** field.
12. Insert a table on the next line with 5 columns and 2 rows.
13. In the top row enter **Start Date**, **End Date**, **Number of Working Days Lost**, **Absence Type** and **Illness Category** in each column.
14. In the bottom row, add the **Start Date**, **End Date**, **Number of Working Days Lost**, **Absence Type** and **Illness Category** fields from **Insert Report Field** into each column.
15. Under the table add a **Page Break** then click **Insert Report Field** and add **Record End**.

<RECORD START>				
<Full Name>				
<NI Number>				
Start Date	End Date	Number of Working Days Lost	Absence Type	Illness Category
<Absence Start Date>	<Absence End Date>	<Working Days Lost>	<Absence Type>	<Illness Category>

16. Click **Save and Close**.
17. In SIMS save the report as **Staff Absence Report**.
18. Run the report.
19. Click **Close** in Word to close the document without saving.

08

Sub Report Count and Excel

This chapter contains:

Chapter Introduction	61
Scenario – Highlighting/Filtering of Late Marks	61
Step by Step – Creating a Late Mark Report	61
Step by Step – Conditional Formatting in Excel	63
Step by Step – Filtering in Excel	64

Chapter Introduction

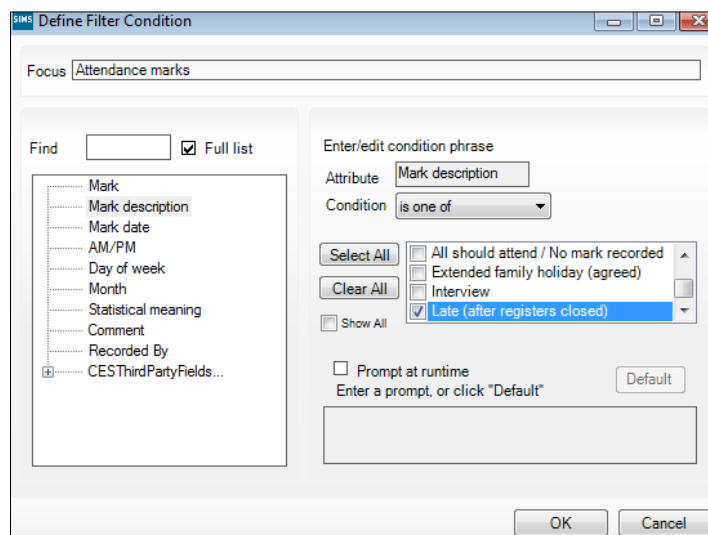
Sub-reports (if used without any fields) can give a count. They can be filtered or colour coded even though no fields are produced in the output.

Scenario – Highlighting/Filtering of Late Marks

The school would like to highlight those pupils who have three or more late marks in a given period and also to filter the list to show pupils who have more than five late marks.

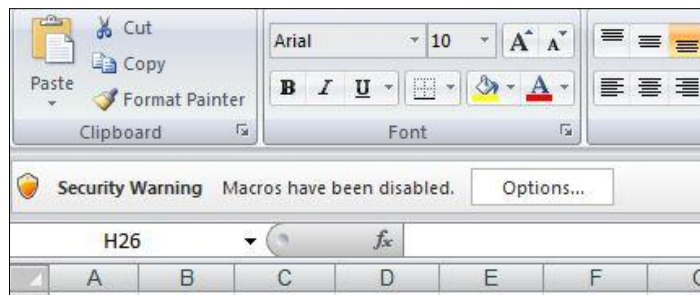
Step by Step – Creating a Late Mark Report

1. **Create a new report.** Focus the report on **Students On roll**.
2. Select the **Legal Surname**, **Legal Forename** and **Reg Group** fields.
3. Add a sub-report of **Attendance Marks**. Do not choose to add any fields from the attendance marks sub-report area as a simple count of marks is required.
4. Click the **Red Book** icon on the right and define a filter. Select **Mark Date** and change the **Condition** to **between**. Add suitable dates (your trainer will advise you of which dates to use). Select the **Prompt at runtime** checkbox. Click **OK**.
5. Click **And** to add a second filter to the sub-report.
6. Select **Mark description** from the list of fields. Ensure that the **Condition** is set to **is one of** and select **Late (before registers closed)** and **Late (after registers closed)** from the list displayed. Click **OK**.



7. Highlight the **Attendance Marks** sub-report and edit the **Caption** box to read **Lates**.

8. Click **Next** to display the **Apply Filter** step to add a new **Prompt at Runtime** filter for **Year Group**.
9. On the **Define Presentation** step select **Excel** from and deselect **Go Straight to Print Preview**.
10. Run the report and select the **Attendance Marks Date Range** and **Year Group**.
11. Excel will now open. Click **Enable Macros** in Excel 2003, in Excel 2007 click **Options** and **Enable all Content** and in Excel 2010 and 2013 click **Enable Content** to run the report.



Excel will display the number of late marks for each pupil for the population of the selected year(s). The output should be similar to the following graphic.

	A	B	C	D	E
1	Legal Surname	Reg	Forename	Reg	Lates
2	Aaron	8A	Chris	8A	1
3	Aaron	8B	Jason	8B	1
4	Aaron	8C	Liz	8C	0
5	Aaron	8D	Sophie	8D	0
6	Abbess	11A	Graham	11A	2
7	Abbey	11B	Sean	11B	3
8	Able	G	Cameron	G	0
9	Ackrington	H	Robert	H	0
10	Ackton	G	Stanley	G	0
11	Ackton	8E	Stephen	8E	2
12	Acton	10F	Jordan	10F	0
13	Acton	11A	Samantha	11A	0
14	Adams	9A	Adam	9A	1
15	Adams	10B	George	10B	0
16	Adams	7A	Laura	7A	3

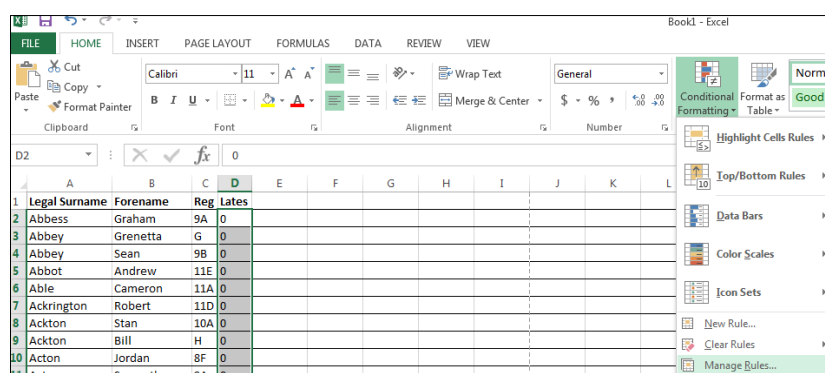
12. The numbers in the **Lates** column are seen as text. To change this, highlight the numerical data in **Column E** and then select **Convert to Number** from the drop-down box on the left-hand side of the column.

	A	B	C	D	E	F	G
1	Legal Surname	Reg	Forename	Reg	Lates		
2	Aaron	8A	Chris	1			
3	Aaron	8B	Jason				
4	Aaron	8C	Liz				
5	Aaron	8D	Sophie				
6	Abbess	11A	Graham				
7	Abbey	11B	Sean				
8	Able	G	Cameron				
9	Ackrington	H	Robert				
10	Ackton	G	Stanley				
11	Ackton	8E	Stephen	8E	2		
12	Acton	10F	Jordan	10F	0		
13	Acton	11A	Samantha	11A	0		
14	Adams	9A	Adam	9A	1		
15	Adams	10B	George	10B	0		
16	Adams	7A	Laura	7A	3		

Step by Step – Conditional Formatting in Excel

Excel now needs to be set so that the **Lates** column is colour-coded according to the school's requirements. This is done using the Excel functionality called **Conditional Formatting**.

1. Highlight the **Lates** column.
2. Click the **Home** tab and select **Conditional Formatting | Manage Rules**.



3. Select **New Rule** from the menu displayed and select **Select a Rule Type: of Format only cells that contain**.
4. Edit the **Rule Description: Cell Value is greater than or equal to** and enter **3** in the right-hand box. Select a suitable format and click **OK** twice.

New Formatting Rule

Select a Rule Type:

- Format all cells based on their values
- Format only cells that contain
- Format only top or bottom ranked values
- Format only values that are above or below average
- Format only unique or duplicate values
- Use a formula to determine which cells to format

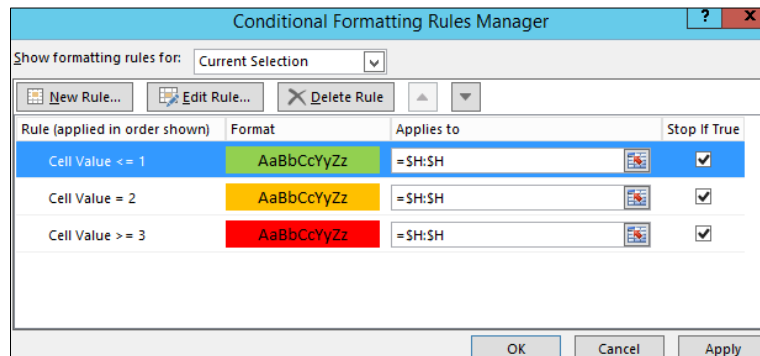
Edit the Rule Description:

Format only cells with:

Cell Value

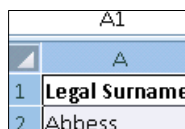
Preview: AaBbCcYyZz

In Excel any cell in the **Lates** column that has a value greater or equal to the number 3 will be coloured. Other rules can be set up to determine the colours of the cells between various ranges as shown in the following graphic.

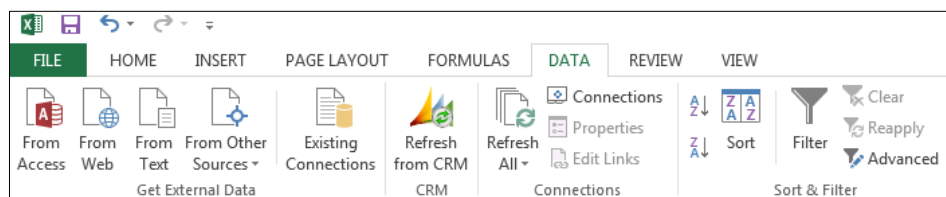


Step by Step – Filtering in Excel

1. Highlight the entire Excel spreadsheet by clicking the button at the top left corner of the spreadsheet, left of **column A** and above **row 1**.



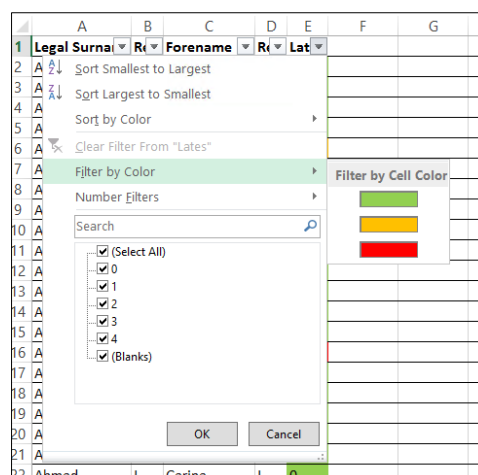
2. Select the **Data** tab and then select **Filter**.

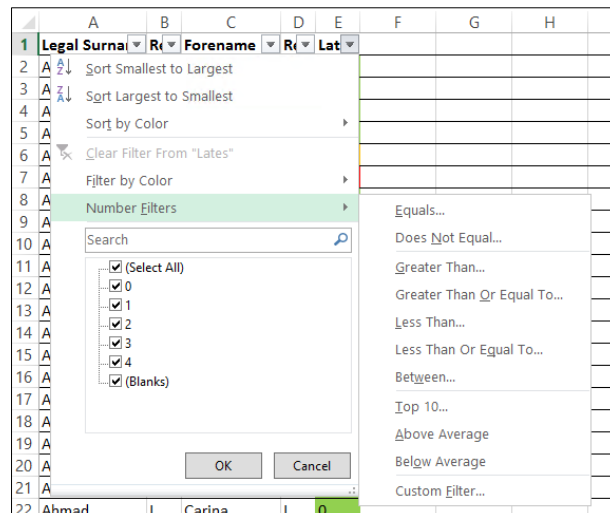


A drop-down arrow should now appear next to the column headings.

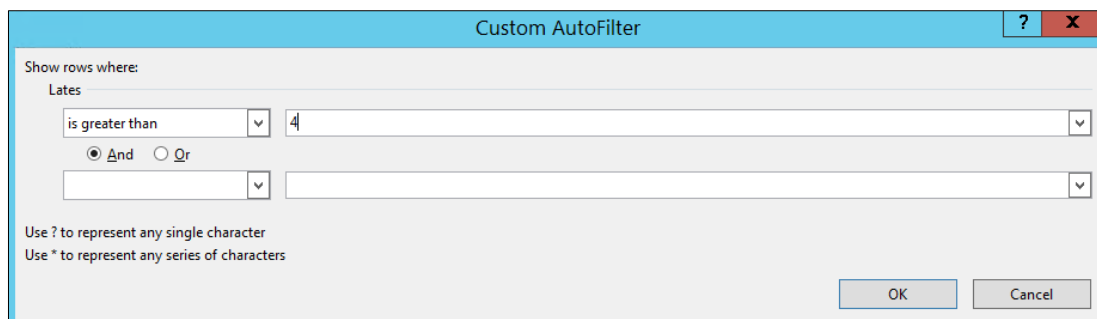
	A	B	C	D	E
1	Legal Surname	Forename			
2	Aaron	8A	Chris	8A	1
3	Aaron	8B	Jason	8B	1
4	Aaron	8C	Liz	8C	0
5	Aaron	8D	Sophie	8D	0
6	Abbess	11A	Graham	11A	2

3. Click the **drop-down** arrow in the **Lates** column heading, and you will see that there are various filters, as displayed in the following graphics.





4. Hover the cursor over **Number Filters** and choose **Greater Than...** and type **4**.



5. When clicking **OK** the list should reduce to just **Students with Late Marks** totalling four or more. Experiment with different filters.

NOTE: The Advanced Reporting with Excel Analysis course is available if you wish to explore the full potential of this area.

09

Analysis Revision

This chapter contains:

Chapter Introduction.....	67
Scenario – Check SEN Pupil Figures	67
Step by Step – Basic Analysis	67
Activity – Ethnic Group Analysis	70

Chapter Introduction

The Standard Reporting course covered analysis, but we will revisit this area of reporting in this chapter as sometimes schools are not aware of how useful this output can be.

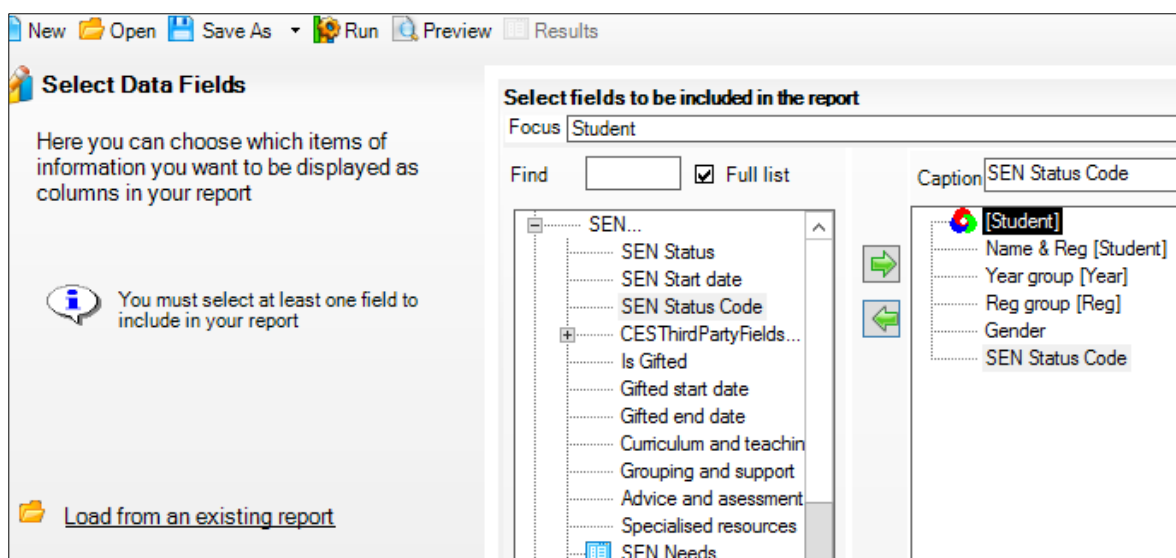
Scenario – Check SEN Pupil Figures

The school wants to check on the number of SEN pupils before school census.

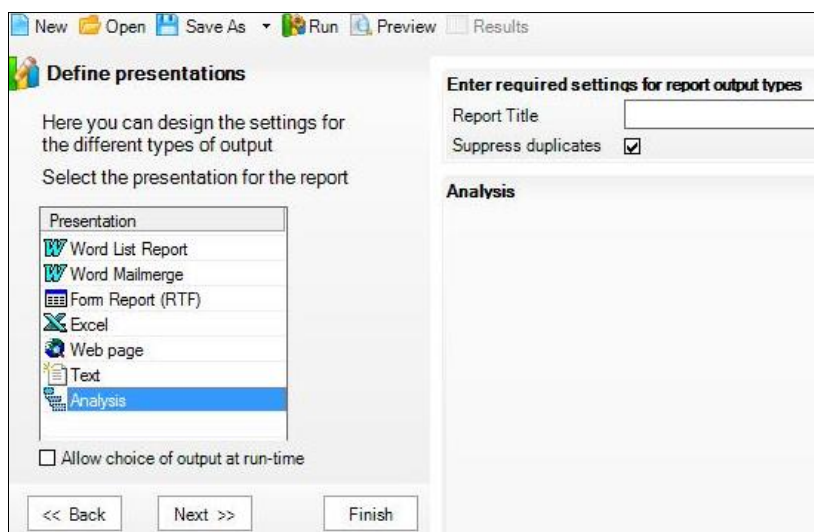
Step by Step – Basic Analysis

1. Create a new report focussing on **Students On-roll**.
2. Select the **Name & Reg** combined field. This must be the first field selected for analysis reports as it provides details when drilling down in the analysis report output. Also select **Year Group**, **Reg Group**, **Ethnicity**, **Gender** and **SEN Status Code**.

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



3. Click **Default Output** and select **Analysis** as the type of **Presentation**.



4. Run the report to start the analysis. The report opens in a new SIMS window.
5. Select **SEN Status Code** from the **Column** drop-down.

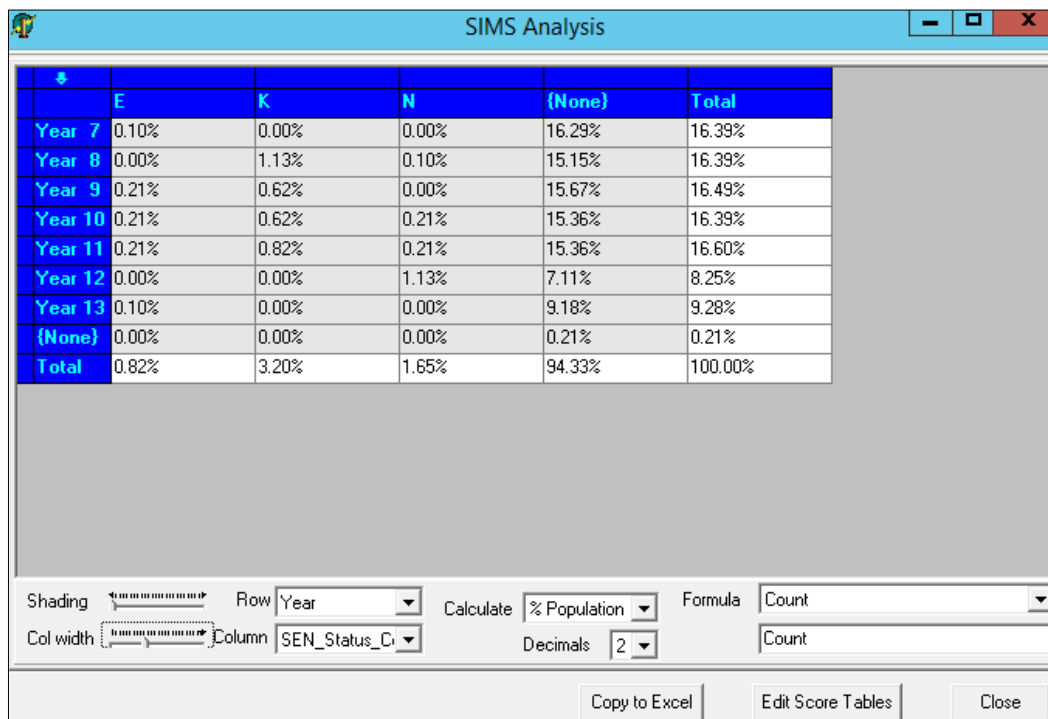
	E	K	N	(None)	Total
Year 7	1	0	0	158	159
Year 8	0	11	1	147	159
Year 9	2	6	0	152	160
Year 10	2	6	2	149	159
Year 11	2	8	2	149	161
Year 12	0	0	11	69	80
Year 13	1	0	0	89	90
(None)	0	0	0	2	2
Total	8	31	16	915	970

Click one of the numbers and a list of the pupils involved will be displayed, using the name and reg field selected first in the design.

Expression	RESULT
Count	
Jasmine Andrews 3F	1
Sylvia Mugarisanwa 3A	1
Totals	2

Result = 2

If **% Population** is selected from the **Calculate** drop-down list and **Decimals** set to **2**, then the grid produced will show the percentage of the population with each level of special needs in each year group.

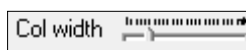


	E	K	N	(None)	Total
Year 7	0.10%	0.00%	0.00%	16.29%	16.39%
Year 8	0.00%	1.13%	0.10%	15.15%	16.39%
Year 9	0.21%	0.62%	0.00%	15.67%	16.49%
Year 10	0.21%	0.62%	0.21%	15.36%	16.39%
Year 11	0.21%	0.82%	0.21%	15.36%	16.60%
Year 12	0.00%	0.00%	1.13%	7.11%	8.25%
Year 13	0.10%	0.00%	0.00%	9.18%	9.28%
(None)	0.00%	0.00%	0.00%	0.21%	0.21%
Total	0.82%	3.20%	1.65%	94.33%	100.00%

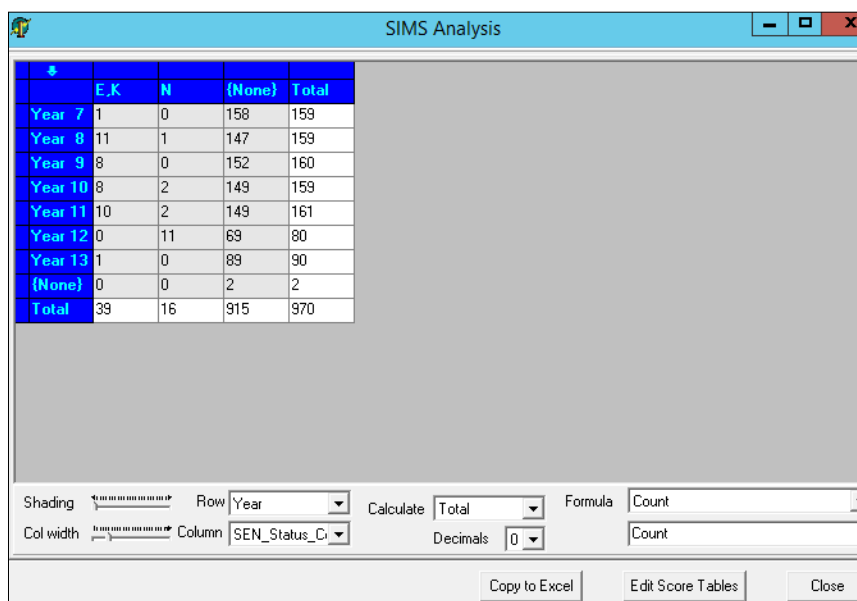
Shading: [Slider] Row: Year Calculate: % Population Formula: Count
Col width: [Slider] Column: SEN_Status_C Decimals: 2 Count

Copy to Excel Edit Score Tables Close

Rows or columns can be combined if you want a combination of different categories of SEN pupils in the school. These can be displayed in the report as one column or row. Depending on your chosen data you may need to click the **Col Width** line and increase the column width.



- To combine data click **K** and drag it on top of the **E** column; the numbers will now be combined and the column renamed **E,K**.



	E,K	N	(None)	Total
Year 7	1	0	158	159
Year 8	11	1	147	159
Year 9	8	0	152	160
Year 10	8	2	149	159
Year 11	10	2	149	161
Year 12	0	11	69	80
Year 13	1	0	89	90
(None)	0	0	2	2
Total	39	16	915	970

Shading: [Slider] Row: Year Calculate: Total Formula: Count
Col width: [Slider] Column: SEN_Status_C Decimals: 0 Count

Copy to Excel Edit Score Tables Close

You can also do this with the rows, for example to put a certain key stage together.

- If you want to unmerge a column or row, select the column, right-click the heading and select **Unmerge selected columns** from the menu displayed.

8. Click the shading line and drag the pointer a little way along the line. The analysis grid will now start to be displayed in colour. The deepest colour is used for the largest number. You may wish to hide the **Total** column and/or row as these will always contain high figures; to do this right-click over the heading and **Hide this column** or **Hide this row**.

	E	K	N
Year 7	1	0	0
Year 8	0	11	1
Year 9	2	6	0
Year 10	2	6	2
Year 11	2	8	2
Year 12	0	0	11
Year 13	1	0	0
Total	8	31	16

9. To copy this grid into Excel, click **Copy to Excel**.
10. Excel the values and the formulas are carried through. This is useful if you discover that someone has been missed and has been added manually into Excel.

	E	K	N
Year 7	1	0	1
Year 8	0	11	11
Year 9	2	6	8
Year 10	2	6	8
Year 11	2	8	10
Year 12	0	0	0
Year 13	1	0	1
Total	8	31	39

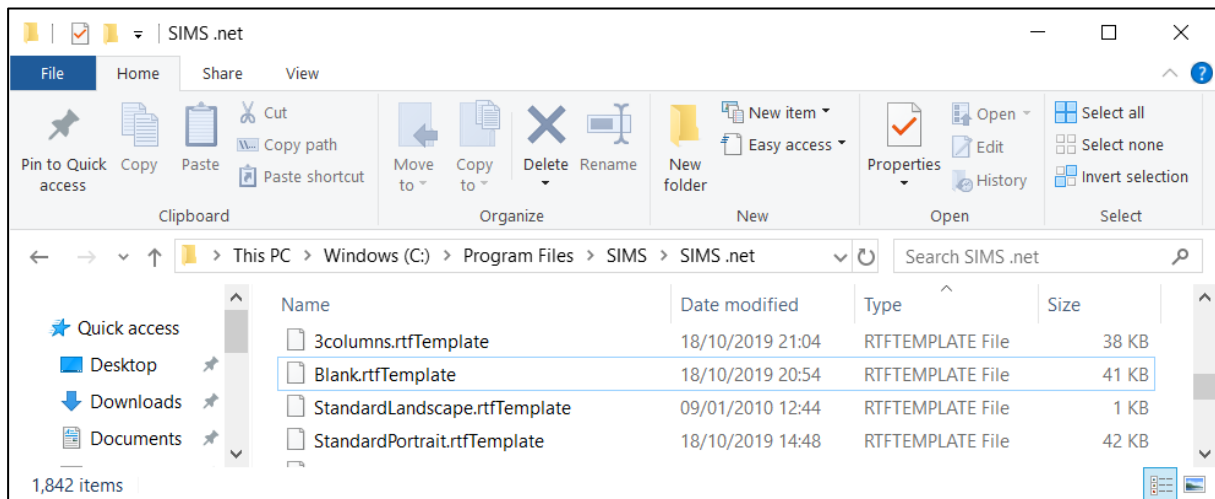
11. Click **Close**.

Activity – Ethnic Group Analysis

Produce an analysis table for the school's chair of governors. The governors require a breakdown of the number of pupils from different ethnic groups.

A Appendix A – RTF Layout Settings

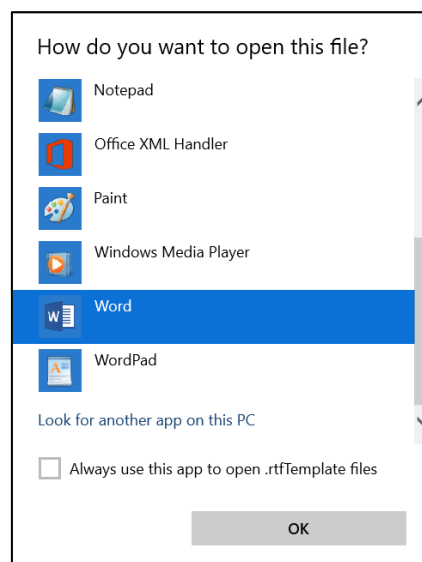
The template files used for Rich Text Format reports are usually found in **C:\Program files\Sims\Sims.net**. They have the file type and extension of **rtfTemplate**.



Page size and other layout setups such as margins as well as font settings can be amended as required in the template files to prevent having to repeatedly do so each time the template is used in a report.

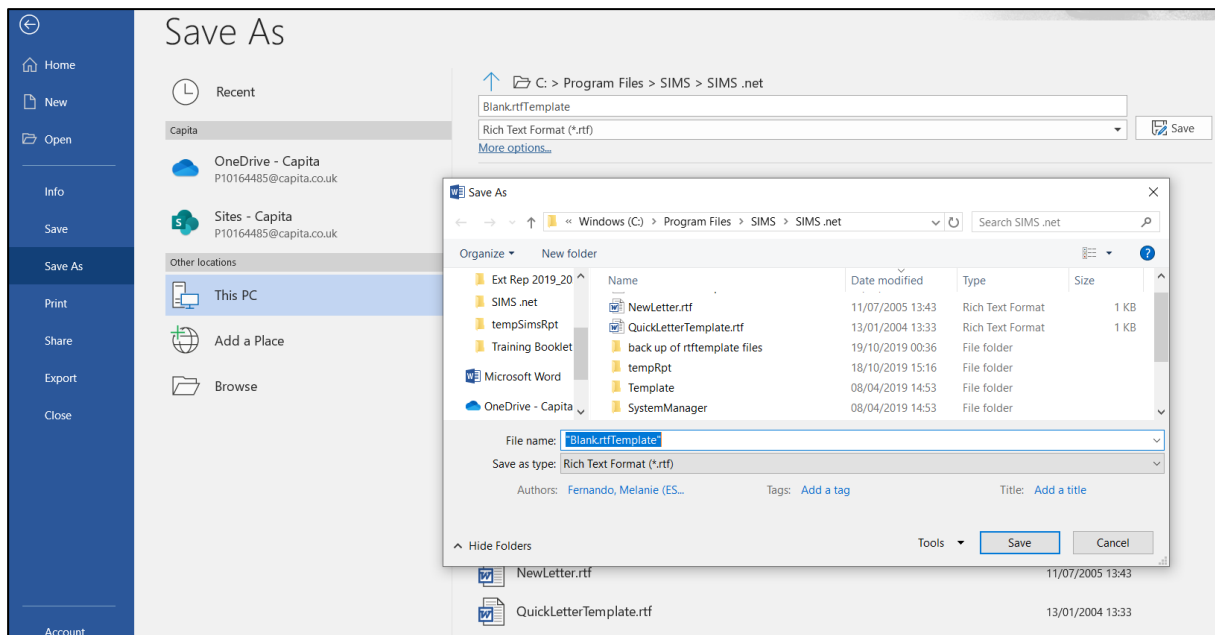
Before you start editing a file take a copy of the RTFTEMPLATE files and place in folder so you can reinstall the originals at any time.

Right click on the template file you want to edit, chose **Open with** and select **Word**.



Make the amendments as required such as changing page size to A4.

Save the file using **File | Save As** and click on **Browse** to open the **Save As** dialog.



Ensure the path to the **Program Files\SIMS\SIMS.net** folder is selected and keep the same file name by entering it exactly the same into the **File name** box but enclosed in double quotes, for example "**Blank.rtfTemplate**". Ensure the filetype is **Rich Text Format**. Click **Save** and close the file.

B

Appendix B – Glossary

Filter – Report Criteria Conditions

When designing reports it is possible to define various criteria to restrict the data returned in the resulting report. Various conditions are used, such as equals, does not equal and so on. The conditions available depend on which type of field is selected. These are as follows:

After

Returns records where the date is after the date selected.

Before

Returns records where the date is before the date selected.

Begins

Returns records where the letters entered appear at the beginning of the field, for example surname begins with Ha would return Haley, Hall, Hawkins and so on.

Between

Returns records where the date falls between the range selected in the value 1 and value 2 fields, for example date of birth between 01 January 1999 and 01 January 2000.

Contains

Returns records where the specified field contains any of the letters entered as long as they are consecutive, for example address-town contains BE will return Bedford, Bexhill, Aberdeen and so on.

Equals

Returns records that match the specific value entered or selected. For text fields, the search is not case sensitive.

Greater than

Returns records where the field value is greater than the number provided.

Less than

Returns records where the field value is less than the number provided.

Is One of or Includes (as Applicable)

Returns records where the field value matches any of the list values selected. Select the values by selecting the checkboxes adjacent to the value names.

Is Null

The field is empty.

Is not Null

The field contains data.

C

Appendix C – Running Scheduled Reports

This chapter contains:

Chapter Introduction	75
Step by Step – Creating a Scheduled Task for Windows 7	75
Step by Step – Changing the Recipient Name	80

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 set up a scheduled task using the AutoReports.exe. 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 Scheduled Report - users must have sufficient access rights to execute the scheduled report.

- The execute scheduled task permission can be checked via **Focus | System Manager | Manage Users**.
- Search for then double-click the name of the applicable user to display the User Details page.
- 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 for 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.

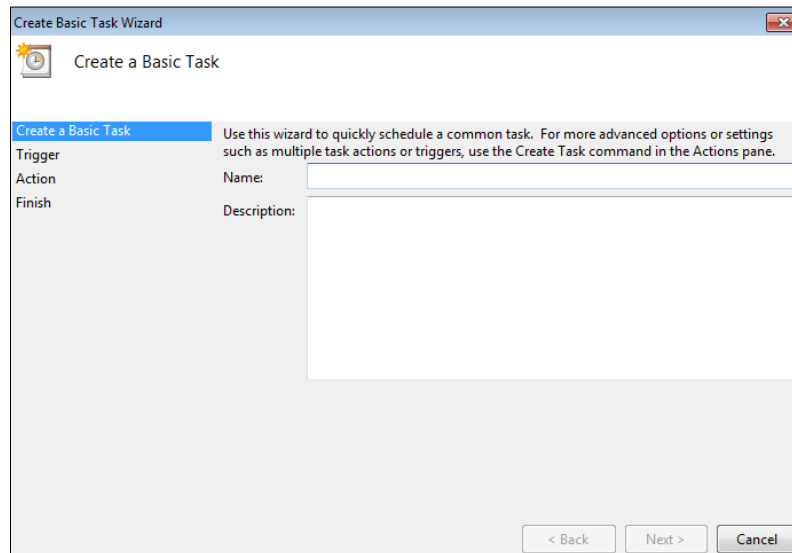
1. Ensure that you have logged into Windows as an administrator.

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

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

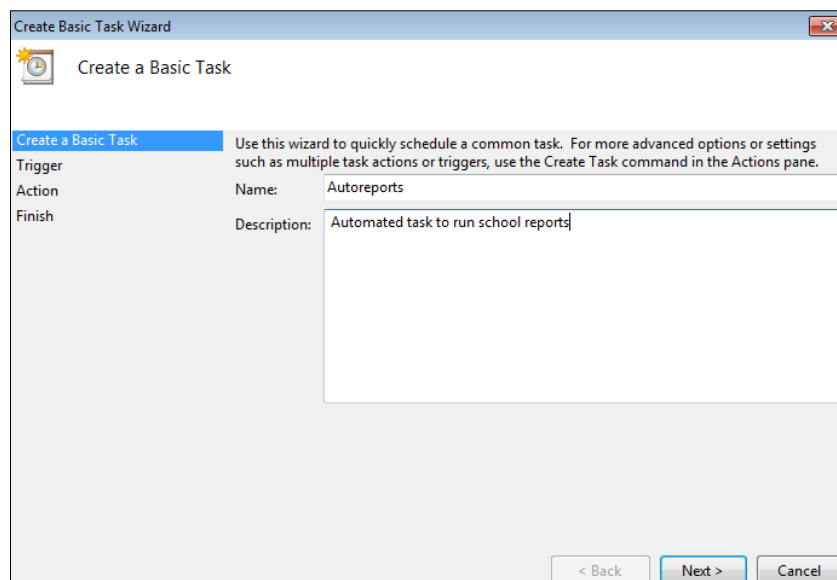
If administrator rights have been set up you may be required to enter a **Password**.

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



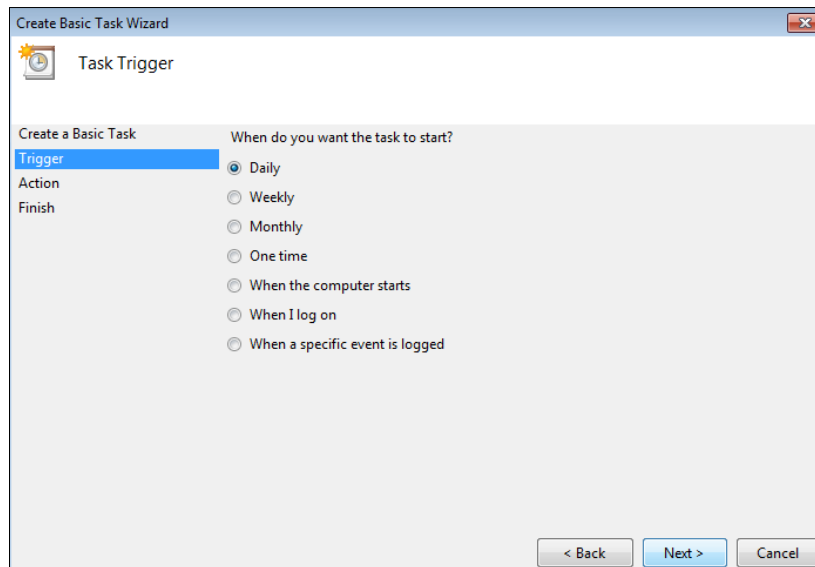
The screenshot shows the 'Create Basic Task Wizard' window. On the left, there is a list of steps: 'Create a Basic Task' (highlighted), 'Trigger', 'Action', and 'Finish'. The main area on the right contains the text: 'Use this wizard to quickly schedule a common task. For more advanced options or settings such as multiple task actions or triggers, use the Create Task command in the Actions pane.' Below this text, there are two input fields: 'Name:' and 'Description:'. Both fields are currently empty. At the bottom right, there are three buttons: '< Back', 'Next >' (which is highlighted with a blue border), and 'Cancel'.

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



This screenshot shows the same 'Create Basic Task Wizard' window as the previous one, but now the 'Name' field contains the text 'Autoreports' and the 'Description' field contains the text 'Automated task to run school reports'. The 'Next >' button remains highlighted.

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

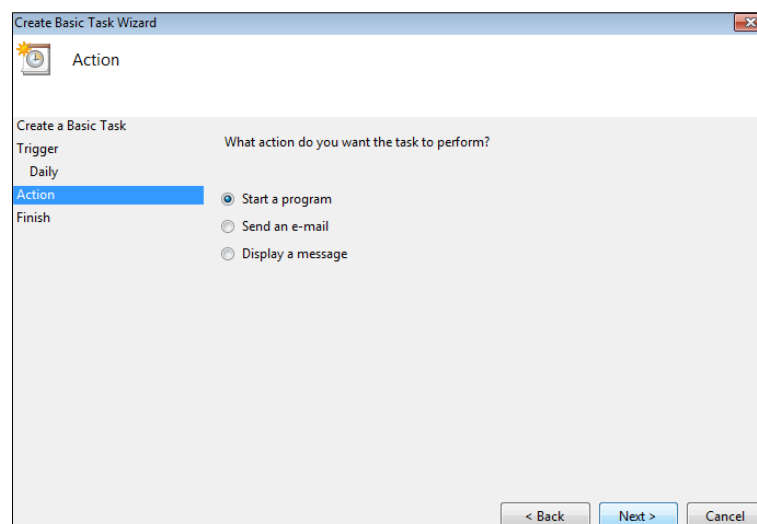


7. Select the appropriate radio button to indicate when you require the task to start and click **Next**.

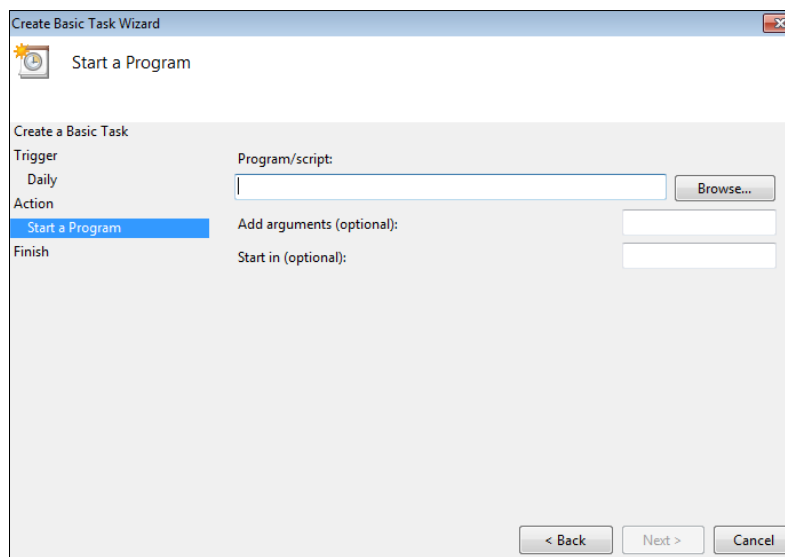
Depending on the number of reports to be run, selecting the **Daily** option is most likely to provide a satisfactory result.

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.

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



10. Ensure that **Start a program** is selected and click **Next**.



11. 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.

12. Highlight the applicable scheduled task filename, for example AutoReports.exe, then click **Open** to return to the **Start a program** page.

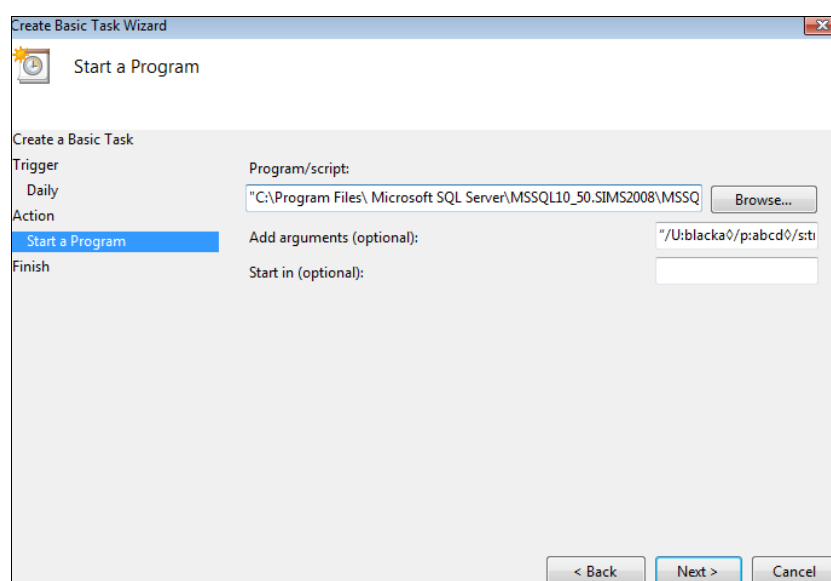
13. Enter the following text in the **Add arguments (optional)** field:

"/U:<username>/p:<password>/s:<SIMSInstance>/d:<databaseName>/R:<location of connect.ini>"

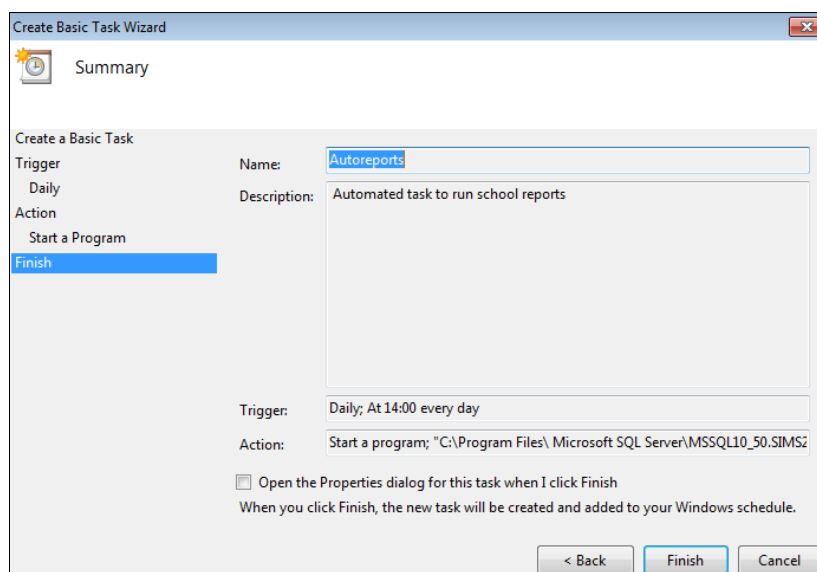
For example

"/U:blacka/p:abcd/s:training/d:engga_sims/R:C:\simstra in\EngGA"

NOTE: It is essential that spaces are included, as indicated by the '/' symbol in the previous examples. Archiving parameters are case sensitive.



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

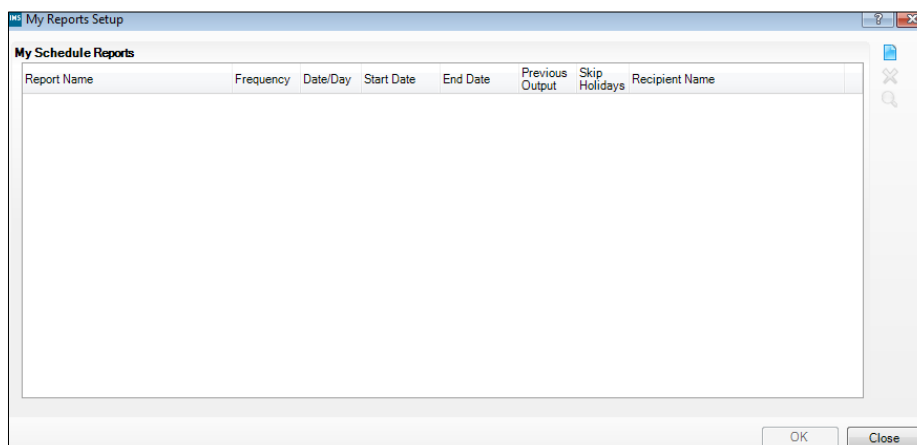


15. Click **Finish** to return to the **Task Scheduler** page where the newly created scheduled task is displayed in the **Active Tasks** panel.

Selecting Reports for Scheduling

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 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

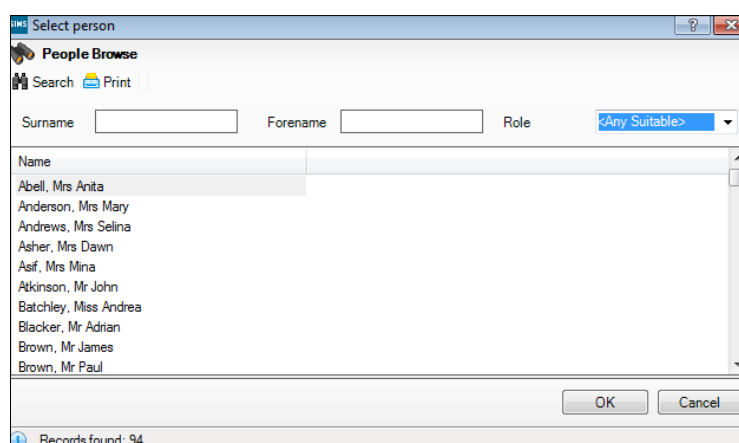
Identify the required report, click into the Previous Output field and select either **Leave** or **Delete** from the drop-down list.

Changing the Skip Holidays

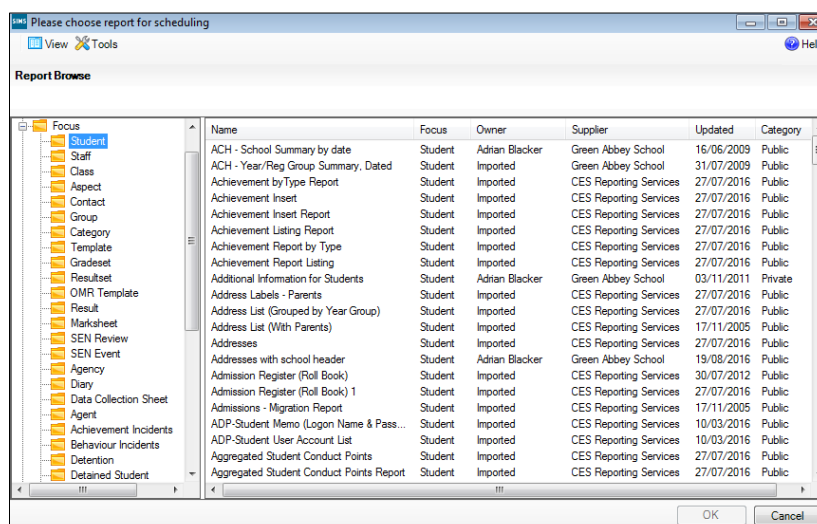
Identify the required report, click into the Skip Holidays field and either select or de-select the checkbox.

Step by Step – Changing the Recipient Name

1. 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.

The dialog box titled "Enter parameter values for report" contains three filter sections:

- Student Status is:** Includes buttons for "Select All", "Clear All", and "Show All". A checkbox for "Accept All (bypass filter condition)" is present. The list of statuses includes: On Roll, Leaver, Pre-admission, and Leaver (Deceased).
- Year group is:** Includes buttons for "Select All", "Clear All", and "Show All". A checkbox for "Accept All (bypass filter condition)" is present. The list of year groups includes: Year 7, Year 8, Year 9, Year 10, and Year 11.
- Reg group is:** Includes buttons for "Select All", "Clear All", and "Show All". A checkbox for "Accept All (bypass filter condition)" is present. The list of registration groups includes: 10A, 10B, 10C, 10D, and 10E.

At the bottom right, there are "OK" and "Cancel" buttons.

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. For example, you could 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.

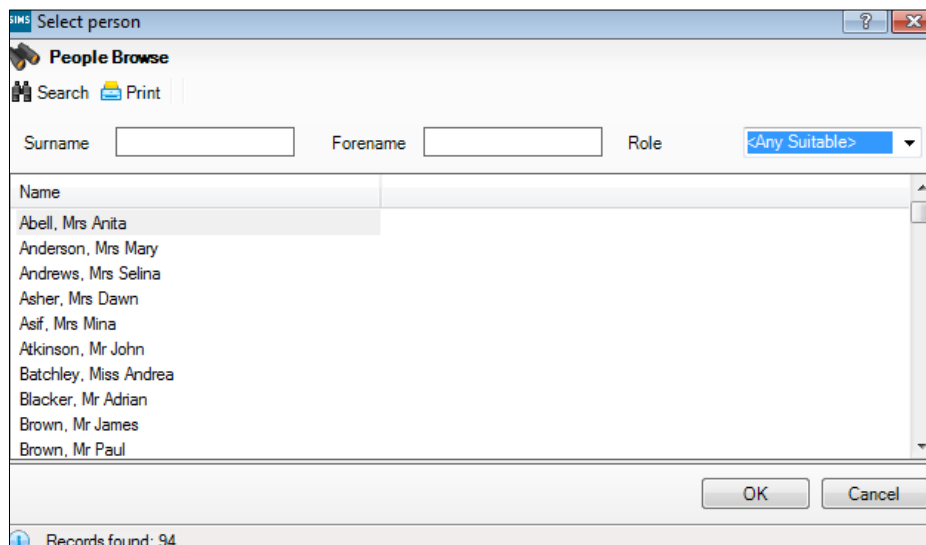
If a report has been set up in this way, when prompted to enter **Run Time Parameters**, you enter values, such as **Surnames**, choose existing values by selecting appropriate checkboxes, or specify a required date.

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. Checking the **Show All** filter checkbox 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 view the report output, click **Click here to view the report** 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.