

Secondary School End of Year Procedures (and Promotion to the Academic Year 2010/2011)

Version 1.1

WARNING: You must complete these procedures before the start of the new academic year.

It is critical that the new academic year is created and promotion routines run before the old year ends. These processes determine the year groups and registration groups into which students are placed in the new academic year. We therefore suggest you start these processes as early as possible, allowing sufficient time to complete by the start of the new academic year.

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Revision History

Doc. Version	Change Description	Date
1.0	Initial Release	09/04/10
1.1	Update to the SLG process and clarity added throughout the document re. the use of Enrolment Status	25/05/10

Introduction

This document describes the steps that should be followed to enable a successful transition from one academic year to another. It includes the creation of a new academic year, setting up next year's registration groups and year groups, etc. together with the promotion of students from one year into the next.

It is applicable only to Secondary school SIMS users and includes sections for schools using any curriculum modules such as Nova-T and Options. Primary school users should refer to the *Primary School End of Year Procedures* available from SupportNet (<http://support.capitaes.co.uk>) – enter **EOY** in the **Site Search** field.

WARNING: You must complete these procedures before the start of the new academic year. It is critical that the new academic year is created and promotion routines run before the old year ends. These processes determine the year groups and registration groups into which students are placed in the new academic year. We therefore suggest you start these processes as early as possible, allowing sufficient time to complete by the start of the new academic year.

Permissions Required

The permissions required to carry out the various end of year processes vary. However, users who are members of the School Administrator and Admissions Officer user groups in System Manager can carry out all the functions in this document. Please consult your System Administrator if you are unsure whether you have the required permissions.

Where to Find More Information

Release notes for previous releases can be obtained by clicking the appropriate menu link on the Home page of our SOLUS website (<http://www.capitaes.co.uk/solus>).

All handbooks referred to throughout this release note can be obtained from any of the following locations:

- The **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button, select the required category then click the required handbook on the **Handbooks** page.
- SupportNet – copies of all handbooks are posted to SupportNet (<http://support.capitaes.co.uk>) and can be obtained by clicking the **Documentation** button on the **Home Page**, then selecting **SIMS Handbooks** from the **Category** drop-down list and clicking the **Search** button.

If you are unable to obtain the required handbook using any of these methods, please email publications@capita.co.uk and we will be pleased to email a copy to you.

End of Year Procedure Check List

This section provides a check list of all the actions that form part of the end of year process.

✓	Description/Task
☐	Recording changes to teaching staff on page 3.
☐	Creating the new academic year on page 8.
☐	Setting up the new academic year's pastoral structure on page 19.
☐	Adding intake/admission groups on page 31.
☐	Adding Staff Codes and Roles for Timetabled and Cover Staff on page 35.
☐	Importing Admissions and Transfer Files (ATF) on page 37 if applicable.
☐	Importing Common Transfer Files (CTF) on page 37.
☐	Recording leavers and Update Course Memberships on page 38.
☐	Exporting Common Transfer Files (CTF) on page 37.
☐	Setting up the promotion mapping for the new academic year on page 42.
☐	Changing the Status of Applications to Offered or Accepted on page 47.
☐	Nova-T6 and Partnership Xchange on page 50.
☐	Transferring the Curriculum and Timetable to SQL on page 50.
☐	Performing Academic Promotion on page 53.
☐	Exporting and importing student group memberships on page 59.
☐	Allocating applicants to Registration Groups/Classes on page 59.
☐	Printing class (registration group) lists for the new academic year on page 61.
☐	In SIMS Attendance - print OMR registration sheets for the first week of term on page 63.
☐	In SIMS Attendance - enter reasons for absence last year (if required) on page 64.
☐	Applying the timetable to the new academic year on page 65.
☐	Other SIMS Module Processes on page 67.

Routines for after the new academic year has started

☐	Admitting applicants on page 70.
☐	Re-admitting students on page 72.
☐	In SIMS Attendance - Print the Official Register for July on page 73.
☐	Setting up a Pattern of Registration and Periods on page 73.
☐	SIMS Learning Gateway on page 74.
☐	Running housekeeping routines in SIMS on page 74.

Recording Changes to Teaching Staff

This section applies to schools that do not use Personnel 7 (i.e. do not record contract information in SIMS). If Personnel 7 is in use, please refer to *Recording Changes to Teaching Staff in Personnel 7* on page 5.

The details of new teachers joining the school should be recorded as soon as the information is available (non-teacher information can be added when known, but is not required for the end of year process). Any existing teachers who are leaving the school should be allocated a leaving date.

NOTES for Nova-T users: All timetable staff must be identified via **Focus | Person | Manage Classroom Staff** (or by clicking **Classroom Staff Details** in the **Links** panel once the staff record has been saved). In addition, you must make sure that the **Staff Code** is the same in SIMS as it is in Nova (via the same route) and that all new classroom staff are given a staff **Role**. For more information, please see Adding Staff Codes and Roles for Timetabled and Cover Staff on page 35.

When adding new rooms - the **Room Code** must be the same in Nova-T and SIMS.

Adding New Teachers

Initially, only **Basic Details** and **Employment Details** need to be entered. For more information, please refer to the *Setting Up and Administering SIMS* handbook.

1. Select **Focus | Person | Staff** to display the **Find Employee** browser. Click the **New** button to display the **Add Employee** page.

2. Enter the **Surname**, **Forename** then select their **Gender** from the drop-down list.
3. Enter the **Date of Birth** in dd/mm/yyyy format or click the **Calendar** button to select the required date.
 *Calendar button*
4. Click the **Continue** button. SIMS checks to see if the member of staff already exists. If no entry exists, the **Employee Details** page is populated with the data just entered.
5. Click the **Employment Details** hyperlink to display the **Employment Details** panel.

6. Select the **Teaching Staff** check box for all teaching staff. This activates the **Teacher Category** drop-down list.

*NOTE: It is important to identify teachers by selecting this check box as it ensures teachers are included in all applicable returns. It was previously necessary to select the **Teaching Staff** check box for all staff to be timetabled. This is now achieved via **Focus | Person | Manage Classroom Staff** (or by clicking **Classroom Staff Details** in the **Links** panel once the record has been saved,). Please see Adding Staff Codes and Roles for Timetabled and Cover Staff on page 35.*

7. Select the required **Teacher Category** (e.g. **Qualified Teachers**) from the drop-down list.
8. Enter a **Teacher Number**, if required. This must be in the format NN/NNNNN, where N represents a number, e.g. **00/12345**.
9. Select the required **Qualified Teacher Status** from the drop-down list.
10. Enter the **Continuous Service Start** date, **Local Authority Start Date** and **Employment Start** date or click the respective **Calendar** buttons and select the required dates.
11. Enter the **Employee/Payroll No.**, if known.
12. Enter a **Staff Code** (up to three characters), if required.

*NOTE: Staff codes for anyone appearing in a timetable and anyone who may be used for Cover (e.g. supply staff, cover supervisors, etc.) must be set via **Focus | Person | Manage Classroom Staff**. Please see Adding Staff Codes and Roles for Timetabled and Cover Staff on page 35. Nova-T users must make sure that the **Staff Code** for anyone to be imported into a timetable must be the same in both Nova-T6 and SIMS.*

*When adding new rooms - the **Room Code** must be the same in Nova-T and SIMS.*

13. Enter the name of the **Previous Employer**, if known.
14. Add a record for a **CRB Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date clearance was received from the Criminal Records Bureau (**Clearance Date**) or click the **Calendar** button to select the required date.
15. Add a record for a **Health Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date that the questionnaire was returned (**Clearance Date**) or click the **Calendar** button to select the required date.
16. Click the **Save** button to add the member of staff. Repeat for any other members of staff joining the school.

☐ **Completed**

Adding Leaving Dates for Existing Staff Members

Enter leaving dates for any teachers as soon as they have left your school.

1. Select **Focus | Person | Staff** to display the **Find Employee** browser.
2. Search for, then double-click the required member of staff to display their details on the **Employee Details** page.
3. Click the **Employment Details** hyperlink to display the **Employment Details** panel.

7 Employment Details

Teaching Staff ☒ Teacher Number

Teacher Category Qualified Teacher Status

Continuous Service Start Local Authority Start Date

Employment Start Employee/Payroll No.

Staff Code Previous Employer

Next Employer Date of Leaving

Check	Clearance Date	Clearance Level

New Open Delete

- Enter the **Date of Leaving** in dd/mm/yyyy format or click the **Calendar** button and select the required date.
- Click the **Save** button to save the changes. Repeat for any other leavers.

NOTE: Check that staff who will no longer be on the timetable or used for Cover, have been removed from Manage Classroom Staff for the new academic year. For more information, please refer to the Academic Management in SIMS handbook.

☐ **Completed**

Recording Changes to Teaching Staff in Personnel 7

This section applies only to schools using Personnel 7, i.e. you are recording all staff details, including contracts, training events and absences in SIMS. If you do not use Personnel, please see *Recording Changes to Teaching Staff* on page 3.

The details of new teachers joining the school should be recorded as soon as the information is available (non-teacher information can be added when known, but is not required for the end of year process). Any existing teachers who are leaving the school should be allocated a leaving date.

*NOTES: Staff codes for anyone appearing in a timetable must be set via **Focus | Person | Manage Classroom Staff**. Please see Adding Staff Codes and Roles for Timetabled and Cover Staff on page 35. Nova-T users must make sure that the **Staff Code** for anyone to be imported into a timetable is the same in both Nova-T6 and SIMS.*

*When adding new rooms, the **Room Code** must be the same in both Nova-T6 and SIMS.*

Adding New Teachers in Personnel 7

Initially, only **Basic Details** and **Employment Details** need to be entered. Further details can be added as they are known. For full instructions, please refer to the *Managing Staff in SIMS* handbook.

- Select **Focus | Person | Staff** to display the **Find Employee** browser. Click the **New** button to display the **Add Employee** page.

Add Employee

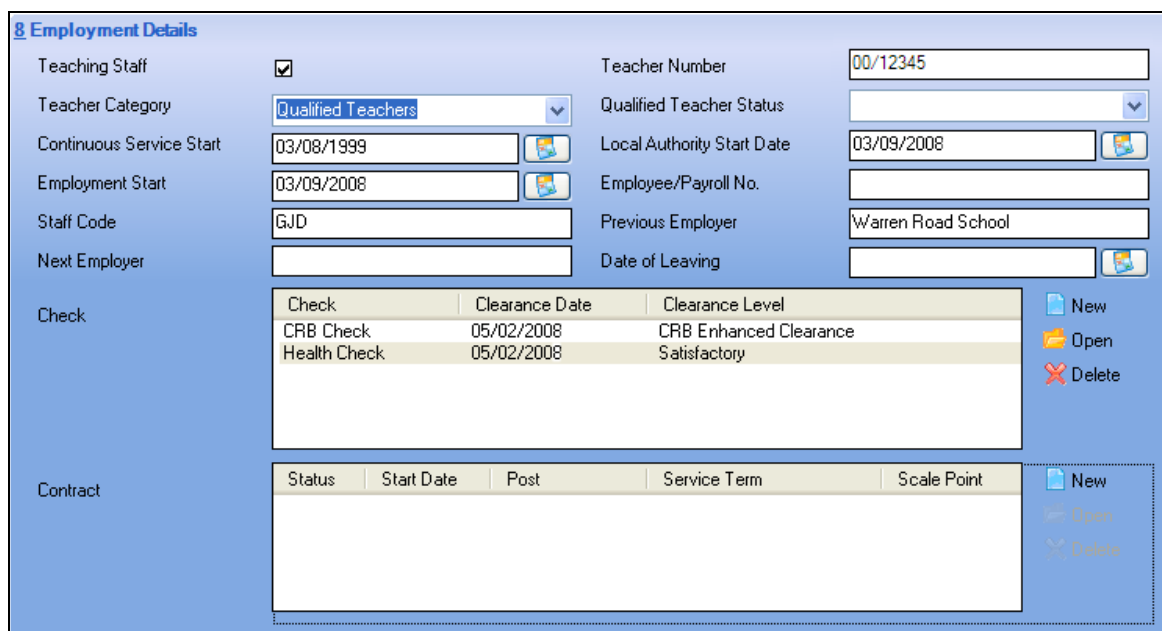
Basic Details

Surname Forename

Gender Date of Birth

Continue

2. Enter the **Surname, Forename**, then select their **Gender** from the drop-down list.
3. Enter the **Date of Birth** in dd/mm/yyyy format or click the **Calendar** button to select the required date.
 *Calendar button*
4. Click the **Continue** button. SIMS checks to see if the member of staff already exists. If no entry exists, the **Employee Details** page is populated with the data just entered.
5. Click the **Employment Details** hyperlink to display the **Employment Details** panel.



6. Select the **Teaching Staff** check box for all teaching staff. This activates the **Teacher Category** drop-down list.

*NOTE: It is important to identify teachers by selecting this check box as it ensures teachers are included in all applicable returns. It was previously necessary to select the **Teaching Staff** check box for all staff to be timetabled. This is now achieved via **Focus | Person | Manage Classroom Staff** (or, once the record has been saved, by clicking **Classroom Staff Details** in the **Links** panel). Please see Adding Staff Codes and Roles for Timetabled and Cover Staff on page 35.*

7. Select the required **Teacher Category** (e.g. **Qualified Teachers**) from the drop-down list.
8. Enter a **Teacher Number** if required. This must be in the format NN/NNNNN, where N represents a number, e.g. **00/12345**.
9. Select the required **Qualified Teacher Status** from the drop-down list.
10. Enter the **Continuous Service Start** date, **Local Authority Start Date** and **Employment Start** date, or click the respective **Calendar** buttons and select the required dates.
11. Enter the **Employee/Payroll No.**, if known.
12. Enter a unique **Staff Code** (up to three characters), if required.

*NOTE: Staff codes for anyone appearing in a timetable must be set via **Focus | Person | Manage Classroom Staff**. Please see Adding Staff Codes and Roles for Timetabled and Cover Staff on page 35. Nova-T users must make sure that the **Staff Code** for anyone to be imported into a timetable is the same in both Nova-T6 and SIMS.*

*When adding new rooms, the **Room Code** must be the same in both Nova-T and SIMS.*

13. Enter the name of the **Previous Employer**, if known.

14. Add a record for a **CRB Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date clearance was received from the Criminal Records Bureau (**Clearance Date**) or click the **Calendar** button to select the required date.
15. Add a record for a **Health Check** in the **Check** panel by clicking the **New** button and selecting from the **Check** drop-down list. Enter the date that the questionnaire was returned (**Clearance Date**) or click the **Calendar** button to select the required date.
16. Click the **Save** button to add the member of staff. Repeat for any other members of staff joining the school.

☐ **Completed**

Adding Leaving Dates for Existing Staff Members in Personnel 7

Enter leaving dates for any teachers as soon as they have left your school.

NOTE for Nova-T6 users: When the timetable is exported from Nova-T6 to SQL, a teacher's assignment to a class will be transferred only if the teacher is on-roll for the whole period between the start date and the end date of the export. If the end date of the export is the end of the Summer term, a class whose teacher has a leaving date before then will be transferred without a teacher, for the entire date range of the export.

1. Select **Focus | Person | Staff** to display the **Find Employee** browser.
2. Search for and then select the required member of staff to display their details on the **Employee Details** page.
3. Click the **Employment Details** hyperlink to display the **Employment Details** panel.

8 Employment Details

Teaching Staff	☒	Teacher Number	00/12345	
Teacher Category	Qualified Teachers	Qualified Teacher Status		
Continuous Service Start	01/01/1991	Local Authority Start Date	01/01/1991	
Employment Start	01/01/1991	Employee/Payroll No.		
Staff Code	RM	Previous Employer	St Thomas More	
Next Employer	High Street School	Date of Leaving	31/08/2008	

Check	Clearance Date	Clearance Level
List 99	14/06/2004	List 99 Cleared

Status	Start Date	Post	Service Term	Scale Point
	01/09/2002	Teacher	Teachers	6

4. Enter the **Date of Leaving** in dd/mm/yyyy format or click the **Calendar** button and select the required date.
5. Click the **Save** button to save the changes. Repeat for any other leavers.

☐ **Completed**

Creating the New Academic Year

NOTE: Options users may have already created a new academic year. This can be checked by selecting **Focus | School | School Diary** to display the School Diary. If already created, the new academic year appears in the list adjacent to the diary and does therefore not need to be recreated.

This process defines the start and end dates for each of the school terms and half-term holidays, together with dates for public holidays and staff training days. If SIMS Attendance is in use, appropriate attendance records are created for each student on the dates entered.

IMPORTANT NOTES:

- Due to the amount of processing resource required to create an academic year, whilst not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. Continuing to work whilst an academic year is being created is likely to result in error messages.
- Please be aware that the process may take a long time while the system creates attendance records for the new academic year.
- When creating an academic year, the start date of the first term is deemed to be the first day of the academic year. This may not necessarily be the day that students arrive in school; it could be an INSET day, for example. An end date is calculated for 365 days later. For example, if the academic year starts on 02/09/10 then an end date of 01/09/11 is automatically supplied.
- The first day of term should be specified even if students are not in attendance.
- Any dates within the start and end dates of the academic year that are not term dates or training days, are considered to be holidays. This prevents the need to manually enter holidays (apart from half-terms and bank holidays).
- Promotion into new year groups, etc. occurs automatically on the first day of the first term of the new academic year (providing that the promotion process has been carried out).

Before proceeding, please check that you have carried out the following:

- Recorded any changes to teaching staff (adding any new teachers and dates of leaving for any leavers).
 - Ensured that you have the new academic year term dates, training days, etc. to hand.
1. Select **Routines | School | Academic Year** to display the **Create Academic Year** wizard.



2. Click the **Next** button to display the **Define the school working week** page.

Defining the School Working Week

Create Academic Year

Define the school working week

Specify the school working week by selecting which days or half days the school is open.

First day of the school week: Monday

Day of the week	AM Session	PM Session
Monday	☒	☒
Tuesday	☒	☒
Wednesday	☒	☒
Thursday	☒	☒
Friday	☒	☒
Saturday	☐	☐
Sunday	☐	☐

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

Preview... ☐ < Back Next > Cancel

The **First day of the school week** drop-down list is read-only and displays the first day of your school week, as specified when your system was first set up.

1. Define the days when the school will be open by selecting the check box(es) adjacent to each required day, including both AM and PM sessions, as required. **AM Session** and **PM Session** check boxes are selected by default for Monday through to Friday.

NOTE: Boarding schools should select all fourteen sessions to record weekend registration.

2. Click the **Next** button to display the **Define the terms and term holidays for the academic year** page.

Defining School Terms

When entering term dates, the start date should always be the date the term starts, even if students are not in school on those days.

Create Academic Year

Define the terms and term holidays for the academic year

Define the school terms start and end dates.

School Terms and Holidays

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	06-09-10	17-12-10	Christmas Holiday
Spring Term	05-01-11	08-04-11	Easter Holiday
Summer Term	26-04-11	22-07-11	Summer Holiday

Click in the **Term Start Date** fields and enter the dates in dd/mm/yyyy format.

Overtyping the term names, if required.

Click this button to add any additional terms, e.g. if your school has a six term academic year.

Click in the **Term End Date** fields and enter the dates in dd/mm/yyyy format.

The holiday that follows the term is displayed by default. Select a different holiday from the **Term Holiday** drop-down list, if required.

A summary of any outstanding errors is displayed here.

Add Term... Remove Preview... ☐ < Back Next > Cancel

1. Enter the dates for the Autumn, Spring and Summer terms by clicking in the applicable **Term Start Date** and **Term End Date** fields and entering the dates in dd/mm/yyyy format, or by selecting from the calendar.

NOTE: Schools that have more than three terms in their academic year need to add additional terms, as described in Adding Additional School Terms on page 11.

Alternatively, click in the date cell until a down arrow appears then click the arrow to display a calendar, from which the required date can be selected.

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	01/09/2010	17/12/2010	Christmas Holiday
Spring Term			Easter Holiday
Summer Term			Summer Holiday

No errors detected. Press 'N' to proceed.

Buttons: Add Term..., Remove..., Today, Clear, < Back, Next >, Cancel

NOTE: You can overtype the name of the term in the **School Term** column if a different name is required.

- Each term has a default holiday displayed in the **Term Holiday** column. If required, select a different holiday from the drop-down list or manually enter a new holiday name.
- Repeat this process for all the default terms displayed, selecting the applicable holiday for each term. Any errors are displayed in the lower section of the wizard and must be resolved before you can proceed.

This example shows a typical three term academic year has been specified.

Create Academic Year

Define the terms and term holidays for the academic year

Define the school terms start and end dates:

School Terms and Holidays

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	01/09/2010	17/12/2010	Christmas Holiday
Spring Term	04/01/2011	08/04/2011	Easter Holiday
Summer Term	26/04/2011	22/07/2011	Summer Holiday

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

Add Term... Remove

Preview: ☐

< Back Next > Cancel

The lower section of this wizard shows that there are no errors.

4. If you are happy with the default three school terms, click the **Next** button to display the **Define the half term holidays** page and proceed to *Defining Half Term Holidays* on page 13.

NOTE: If the **Next** button appears greyed out, move the cursor off the last **Term End Date** by pressing the **Tab** key.

Selecting this check box displays a preview of the information entered so far.

Create Academic Year

Define the terms and term holidays for the academic year

Define the school terms start and end dates:

School Terms and Holidays

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	01/09/2010	17/12/2010	Christmas Holiday
Spring Term	04/01/2011	08/04/2011	Easter Holiday
Summer Term	26/04/2011	22/07/2011	Summer Holiday

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

Add Term... Remove

Preview: ☒

< Back Next > Cancel

The preview is displayed here. This example shows a preview of a completed academic year.

Expand the preview for more detail by clicking the + icon (which changes to a - icon when selected). The detail is displayed directly below.

New Academic Year Preview

- Academic Year 2010/2011
 - Autumn Term 01/09/2010-17/12/2010
 - Christmas Holiday 18/12/2010-04/01/2011
 - Spring Term 04/01/2011-08/04/2011
 - Easter Holiday 09/04/2011-22/07/2011
 - Summer Term 26/04/2011-22/07/2011
 - Summer Holiday 23/07/2011-30/08/2011

From this point onwards, you can select the **Preview** check box in the wizard to display a preview panel on the right-hand side of the wizard. The preview panel updates based on the selections you make throughout the process. Deselect the **Preview** check box whenever you want to hide the preview panel.

Adding Additional School Terms

Some schools may wish to add additional terms, if for example your school has four or six terms in an academic year. The following example demonstrates the addition of a Winter term.

NOTE: When adding terms, the start date should always be the date the term starts, even if students are not in school on that day.

1. From the **Define the terms and term holidays for the academic year** page of the wizard, click the **Add Term** button to display the **Term Details** dialog.

The image shows a Windows-style dialog box titled "Term Details" with a red close button in the top right corner. Inside the dialog, there are four labeled fields: "School Term:" with a dropdown menu showing "Winter Term"; "Term Start Date:" with a text box containing "01/11/2010" and a calendar icon; "Term End Date:" with a text box containing "17/12/2010" and a calendar icon; and "Term Holiday:" with a dropdown menu showing "Christmas Holiday". At the bottom of the dialog are two buttons: "OK" and "Cancel".

2. Select the term name from the **School Term** drop-down list. If the required name does not exist, enter a name manually, e.g. **Winter Term**.
3. Enter the **Term Start Date** and **Term End Date** in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.
4. Select the holiday that follows the term from the **Term Holiday** drop-down list, e.g. **Christmas Holiday**. If the required name does not exist, enter the holiday name manually.
5. Click the **OK** button to add the term. Repeat for any other additional terms.
6. Click the **Next** button to display the **Define the half term holidays** page.

Defining Half Term Holidays

Holidays are automatically created for the dates in between the term dates entered. For example, if the Spring term ends on 01/04/2011 and the Summer term starts on the 19/04/2011, then it is assumed that the dates in between are holidays. In addition, you need to enter the dates for half-term holidays manually.

NOTE: You do not need to define half-term holidays if you have created a six term academic year, where the half-term dates fall between the terms.

Create Academic Year

Define the half term holidays

Define the half term holidays, start and end date for every holiday. This information is optional.

Category	Start Date	End Date	Description
No errors detected. Press 'Next' to continue...			

Preview... ☐

1. From the **Define the half term holidays** page, click the **Add Holiday** button to display the **Half Term Holiday Details** dialog.

Half Term Holiday Details

Category: Half-Term

Start Date: 25/10/2010

End Date: 29/10/2010

Description: Autumn Half Term

2. Select **Half-Term** from the **Category** drop-down list.
3. Enter the **Start Date** and **End Date** for the half-term holiday in dd/mm/yyyy format. Alternatively, click the **Calendar** buttons and select the required dates from the calendars.
4. Enter a **Description** for the half-term holiday if required, such as **Autumn Half-Term**. This description appears in the School Diary.

5. Click the **OK** button to add the half-term holiday. Repeat steps 1 to 4 for the remaining half-term holidays.

Create Academic Year

Define the terms and term holidays for the academic year

Define the school terms start and end dates.

School Terms and Holidays

School Term	Term Start Date	Term End Date	Term Holiday
Autumn Term	01/09/2010	17/12/2010	Christmas Holiday
Spring Term	04/01/2011	08/04/2011	Easter Holiday
Summer Term	26/04/2011	22/07/2011	Summer Holiday

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

Preview: ☐

< Back Next > Cancel

6. Click the **Next** button to display the **Define teacher training days** page.

Defining Teacher Training Days

The **Define teacher training days** page is used to enter any training days where students will not be attending school. It is advisable to enter any known INSET days at this point. Alternatively, they can be added later via the School Diary (**Focus | School | School Diary**).

For more information, please refer to the *Setting Up and Administering SIMS* handbook.

Create Academic Year

Define teacher training days

This information is optional at this stage and can be defined later via the School Diary.

Category	Date	Description

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

Preview... ☐

1. From the **Define teacher training days** page, click the **Add** button to display the **New Teacher Training Day** dialog.

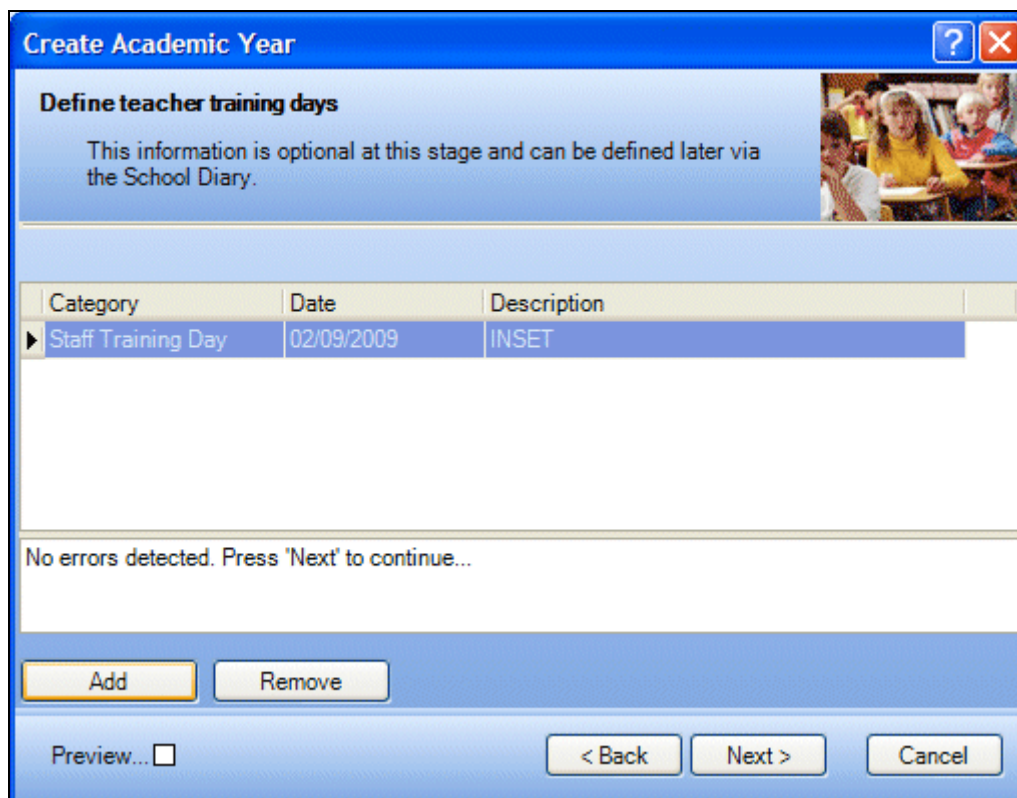
New Teacher Training Day

Category: Staff Training Day

Date: 01/09/2010

Description: INSET

2. Select **Staff Training Day** from the **Category** drop-down list. If the required category name does not exist, enter the name manually.
3. Enter the **Date** of the training day in dd/mm/yyyy format or click the **Calendar** button and select the date.
4. Enter a relevant **Description**, if required, e.g. **INSET Day**, to ensure that the type of training can be identified. The description appears in the School Diary.
5. Click the **OK** button to add the teacher training day. Repeat for any other required teacher training days.



Create Academic Year

Define teacher training days

This information is optional at this stage and can be defined later via the School Diary.

Category	Date	Description
Staff Training Day	02/09/2009	INSET

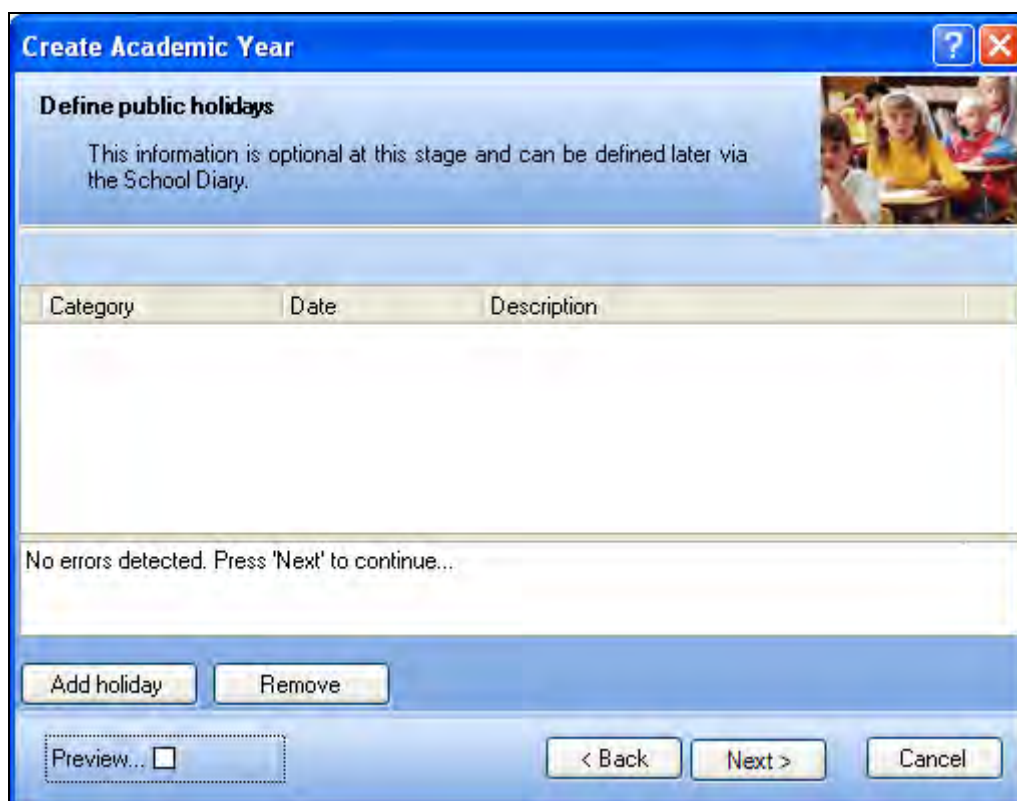
No errors detected. Press 'Next' to continue...

☐ Preview...

- Click the **Next** button to display the **Define public holidays** page.

Defining Public Holidays

In addition to other dates during term time, you will also need to specify any public holidays, such as Bank Holidays, particularly those that occur during term time.



Create Academic Year

Define public holidays

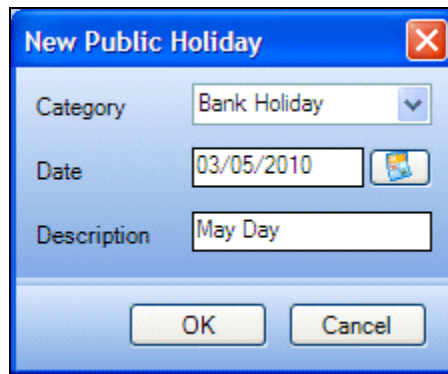
This information is optional at this stage and can be defined later via the School Diary.

Category	Date	Description
----------	------	-------------

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

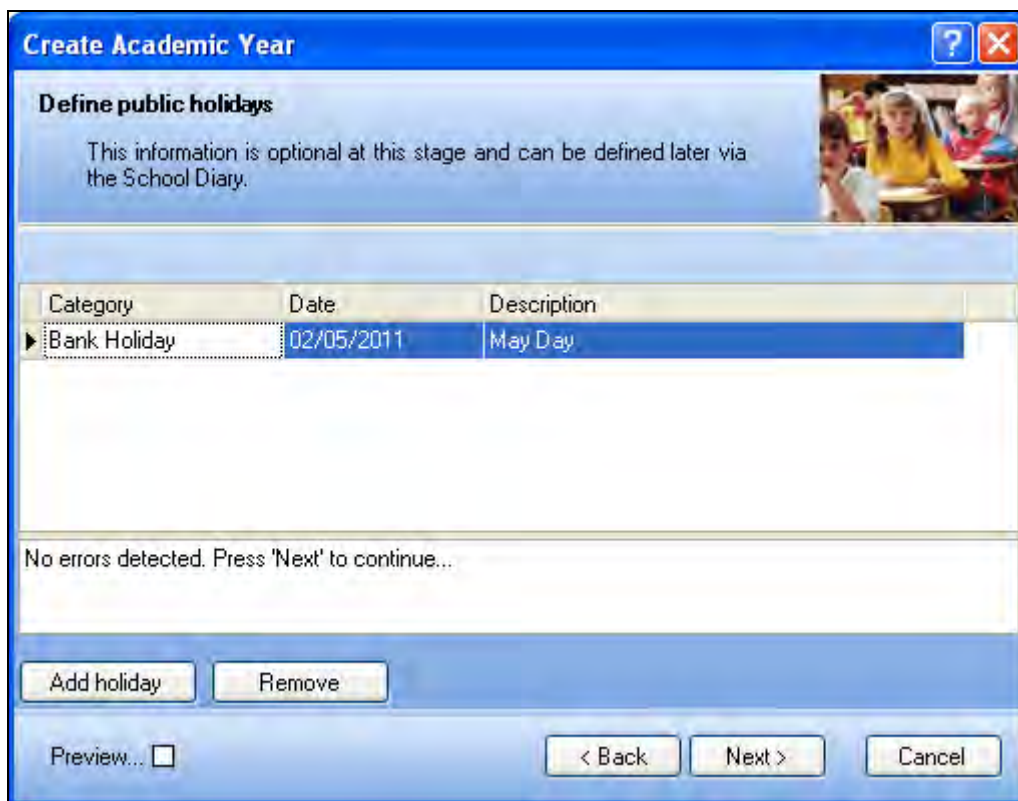
☐ Preview...

- From the **Define public holidays** page, click the **Add holiday** button to display the **New Public Holiday** dialog.



The 'New Public Holiday' dialog box has a blue title bar with a close button. It contains three input fields: 'Category' with a dropdown menu showing 'Bank Holiday', 'Date' with a text box showing '03/05/2010' and a calendar icon, and 'Description' with a text box showing 'May Day'. At the bottom are 'OK' and 'Cancel' buttons.

- Select **Bank Holiday** from the **Category** drop-down list. If the category name does not exist, enter the name manually.
- Enter the **Date** of the public holiday in dd/mm/yyyy format or click the **Calendar** button and select the required date.
- Enter a relevant **Description**, such as **May Bank Holiday**. This description appears in the School Diary.
- Click the **OK** button to add the public holiday. Repeat this process for all public holidays throughout the academic year.



The 'Create Academic Year' dialog box has a blue title bar with a help icon and a close button. It features a section titled 'Define public holidays' with a note: 'This information is optional at this stage and can be defined later via the School Diary.' Below this is a table with three columns: 'Category', 'Date', and 'Description'. The table contains one row: 'Bank Holiday', '02/05/2011', and 'May Day'. Below the table, it says 'No errors detected. Press 'Next' to continue...'. At the bottom are buttons for 'Add holiday', 'Remove', 'Preview...' (with a checkbox), '< Back', 'Next >', and 'Cancel'.

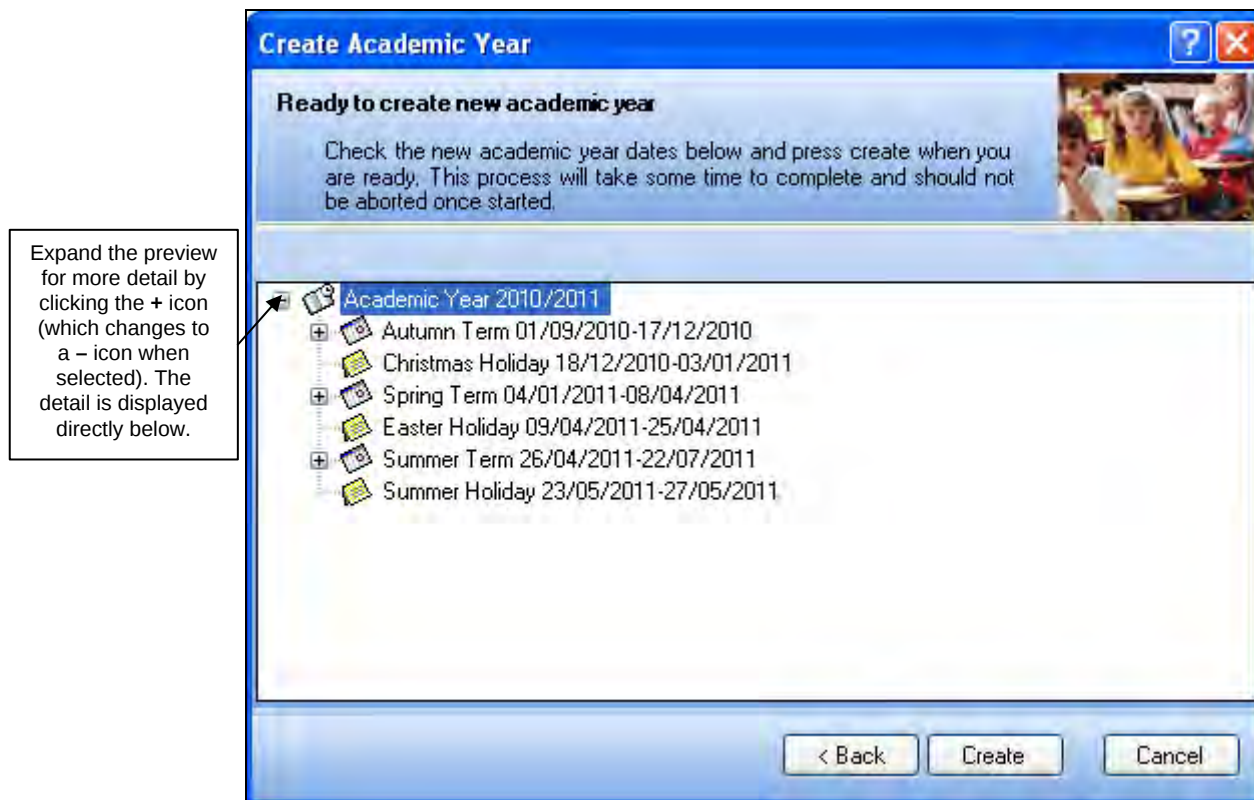
Category	Date	Description
Bank Holiday	02/05/2011	May Day

- Click the **Next** button to display the **Ready to create new academic year** page.

Creating the New Academic Year

Whilst it is not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. This is because a large amount of processing resource is required to create an academic year.

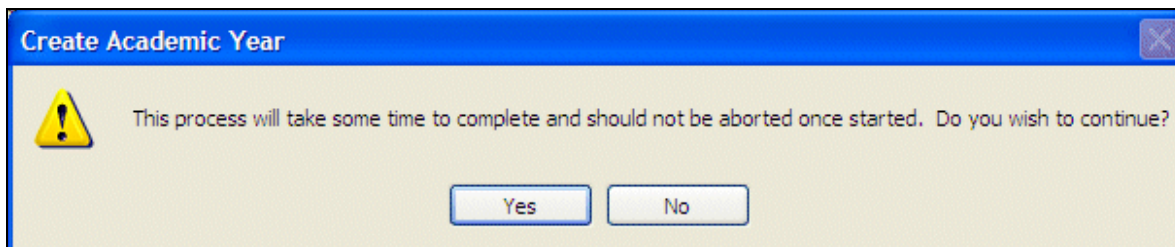
Please be aware that this process may take a long time because the system creates attendance records for the new year.



1. A summary of the data entered is displayed on the **Ready to create new academic year** page. The detail of each term can be expanded to display its public holidays, teacher training days, etc. by clicking the applicable + icon. You are strongly advised to check this information carefully for any errors or inaccuracies.

Once you are sure that the information is correct, click the **Create** button to create the new academic year. If there are any anomalies in your settings, you are asked to confirm whether you wish to proceed or review your settings. If you are certain the data is correct, you can proceed.

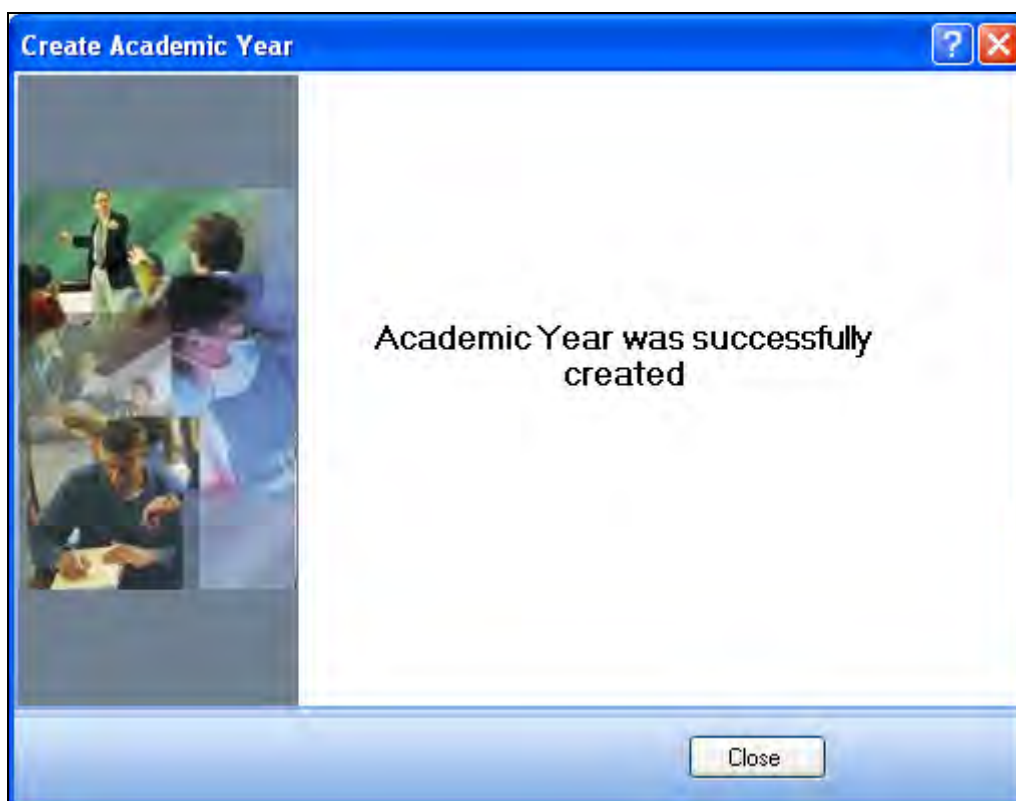
The following warning message is displayed:



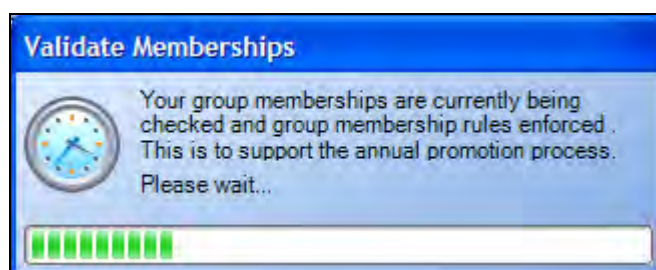
Progress is displayed via a progress indicator at the bottom of the wizard.



Once complete, the final page of the wizard is displayed.



2. Click the **Close** button to close the wizard and complete the process.
3. It is recommended that once you have created an academic year, you validate group memberships by selecting **Tools | Validate Memberships** which displays the following page.



☐ **Completed**

Setting up the New Academic Year's Pastoral Structure

The new academic year's pastoral structure is automatically set up when the new academic year is created and is based on the current academic year's structure. Therefore, you must ensure that a new academic year has been created before proceeding with the instructions in this section.

There may be occasions when the new academic year's pastoral structure needs to be different from the current structure. For example, you may wish to:

- add additional registration groups where student numbers have increased.
- merge registration groups where student numbers have decreased.
- add a new year group, such as the introduction of a Sixth Form to your school.
- change class names.

NOTES:

- *It is not essential to assign teachers to registration groups at this stage. This can be done when the information is known, but must be done before the start of the academic year so that Attendance records are not affected.*
 - *If you want teachers to move up with their students in the next academic year, this can be achieved as part of the pastoral promotion process. For more information, please see Set up the Promotion Mapping for the New Academic Year on page 42.*
 - *If an additional year group is required, e.g. a Sixth Form has been introduced to the school, this should be added before admission groups are created to ensure that the new year group is available for selection. For more information, please see Adding Intake/Admission Groups on page 31.*
-

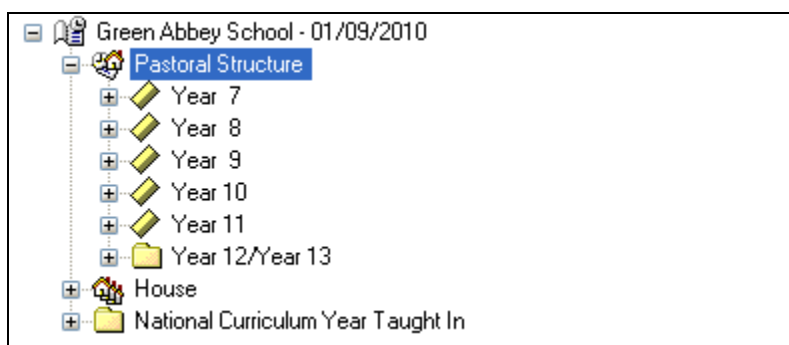
Opening the Structure of the New Academic Year

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

IMPORTANT NOTE: To ensure that changes are being made for the next academic year, rather than the current academic year, ensure that the start date of the next academic year is displayed in the **Effective Date** field.



2. The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information.



3. The full structure can be viewed by clicking the + or - icons to expand or contract the display.

Checking National Curriculum Years

Please ensure that the National Curriculum year associated with each year group is correct. This can be achieved by right-clicking on each year group and selecting **Properties** from the pop-up menu to display the **Year Group** dialog. The **National Curriculum Year** associated with the year group is displayed.

☐ Completed

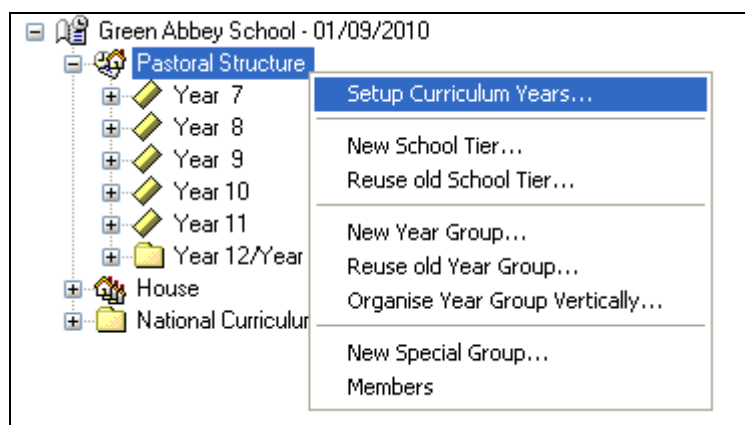
Adding New Year Groups

If an additional year group is required, such as the introduction of a sixth form, this should be added before admission groups are created to ensure that the new year group is available for selection.

This process is unlikely to be required. If you do not intend to add any new year groups, please proceed to *Adding Classes (Registration Groups)* on page 23.

1. Select next year's pastoral structure, as described in *Opening the Structure of the New Academic Year* on page 20.

NOTE: If you are adding a year group because you are extending the range of years, you will also need to set up a National Curriculum year. This is achieved by right-clicking the **Pastoral Structure** item in the navigation tree, selecting **Setup Curriculum Years** then selecting the required curriculum year check box.



Errors are displayed at the bottom of the screen until years and registration groups have been added.

NOTE: Once a National Curriculum year has been created, it cannot be deleted. Therefore, please ensure that the correct NC year is added.

2. Right-click the **Pastoral Structure** item in the navigation tree and select **New Year Group** from the pop-up menu to display the **Year Group** dialog.

3. Select the **National Curriculum Year** item in the structure with which the year group will be associated from the drop-down list.
4. Enter a **Short Name** and a **Full Name** for the year group.

The **Full Name** (up to 32 characters) is used throughout SIMS to identify the year group (e.g. **Year 12**). The **Short Name** (up to 10 characters) is used for column headings in reports (e.g. **Y12**). Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of six characters. Both names must be unique within the school.

5. Select the **Head of Year** if required, by clicking the **Browser** button to display the **Select person** dialog.



Browser button

6. Enter a **Surname** and/or **Forename** then click the **Search** button. Alternatively, leave the fields blank to search for all staff.

*NOTE: Only members of staff who have been defined as teachers within your SIMS system are available for selection (i.e. the **Teaching Staff** check box on the **Staff Details** page is selected).*



Highlight the required person and click the **OK** button to select them as the Head of Year and return to the **Year Group** dialog.

7. Select a **Supervisor** for the year group (if required) by clicking the **New** button to display the **Supervisor Properties** dialog. This is optional and/or can be done at a later date if preferred. If you do not intend to add a Supervisor, please proceed to step 8.

 **New button**



- Select the **Role** from the drop-down list then click the **Browser** button to display the **Select person** dialog.

*NOTE: By default, the **Role** drop-down list displays **Supervisor** and **Pastoral Manager**, but these may be changed or added to by the System Manager.*

- Search for, and select, the required supervisor in the same way as the Head of Year. Click the **Ok** button on the **Supervisor Properties** dialog to set the selected person as the supervisor and return to the **Year Group** dialog.
8. Click the **Ok** button on the **Year Group** dialog to add the year group. You must now add applicable classes, as described in the next section.

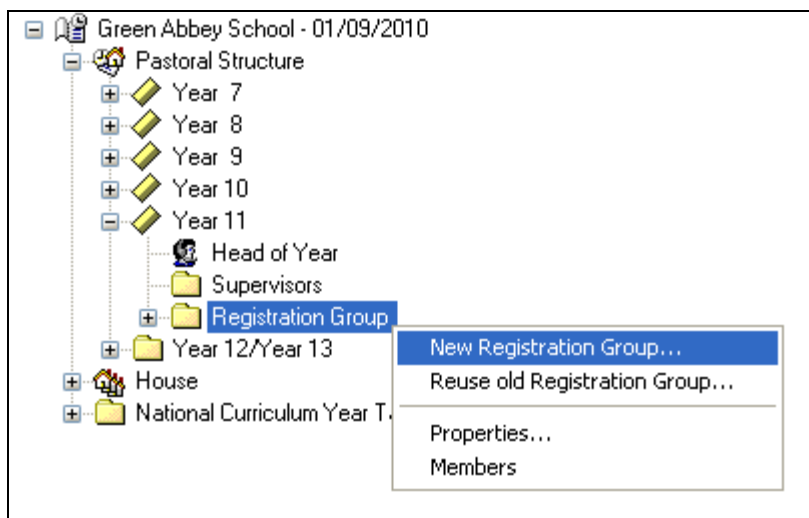
 **Completed**

Adding Classes (Registration Groups)

You are strongly advised to check whether the name you intend to use for a new registration group has not previously been used. This is achieved by expanding the Pastoral Structure and appropriate year group item then the required year group then right-clicking the **Registration Group** folder and selecting **Reuse Old Registration Groups** from the pop-up menu to display the **Reuse old Registration Group** dialog. This dialog lists any registration groups that have previously been deleted.

If the required name is listed, highlight it and click the **OK** button to re-use the registration group rather than create a new registration group with the same name. If the required name is not listed, click the **Cancel** button then create a new registration group as follows:

1. Select next year's pastoral structure, as described in *Opening the Structure of the New Academic Year* on page 20.
2. Expand the year group to which you wish to add the registration group by clicking the adjacent **+** icon.



3. Right-click the **Registration Group** folder and select **New Registration Group** from the pop-up menu to display the **Registration Group** dialog.

The screenshot shows the 'Registration Group' dialog box. It has a title bar with a question mark and a close button. The dialog contains several input fields and a table. The 'Short Name' field is labeled 'SA'. The 'Full Name' field is labeled 'Sixth Form A'. The 'Registration Tutor' field is labeled 'Mrs Pauline Brown' and has a search icon and a close button. The 'Supervisors' field is a table with two columns: 'Role' and 'Name'. The 'Room' field is empty and has a search icon. At the bottom, there are 'Ok' and 'Cancel' buttons.

4. Enter a **Short Name** and **Full Name** for the new registration group.

The **Full Name** (up to 32 characters) is used throughout SIMS to identify the registration group, e.g. **Sixth Form A**. The **Short Name** (up to 10 characters) is used for column headings in reports. Consequently, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of six characters. Both names must be unique within the school.

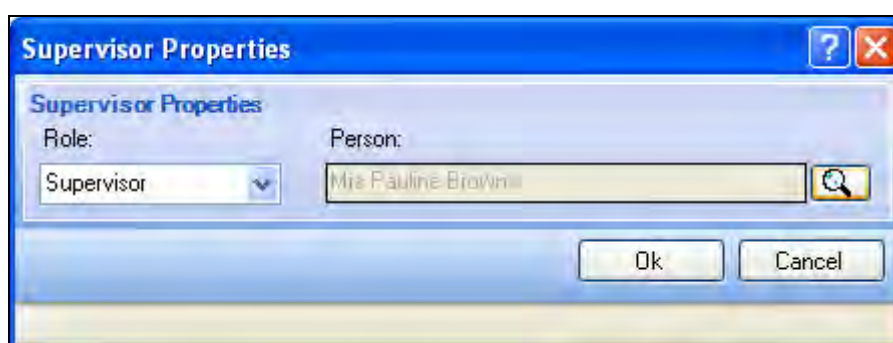
5. Add the **Registration Tutor** by clicking the **Browser** button to display the **Select person** browser.



6. Enter a **Surname** and/or **Forename** then click on the **Search** button. Alternatively, leave the fields blank to search for all staff.
7. Highlight the required person and click the **OK** button to select them as the Registration Tutor and return to the **Registration Group** dialog.
8. Select a supervisor for the registration group (if required) by clicking the **New** button adjacent to the **Supervisors** field to open the **Supervisor Properties** dialog. This is optional and can be done at a later date, if preferred. If you do not wish to add a supervisor, please proceed to step 9.



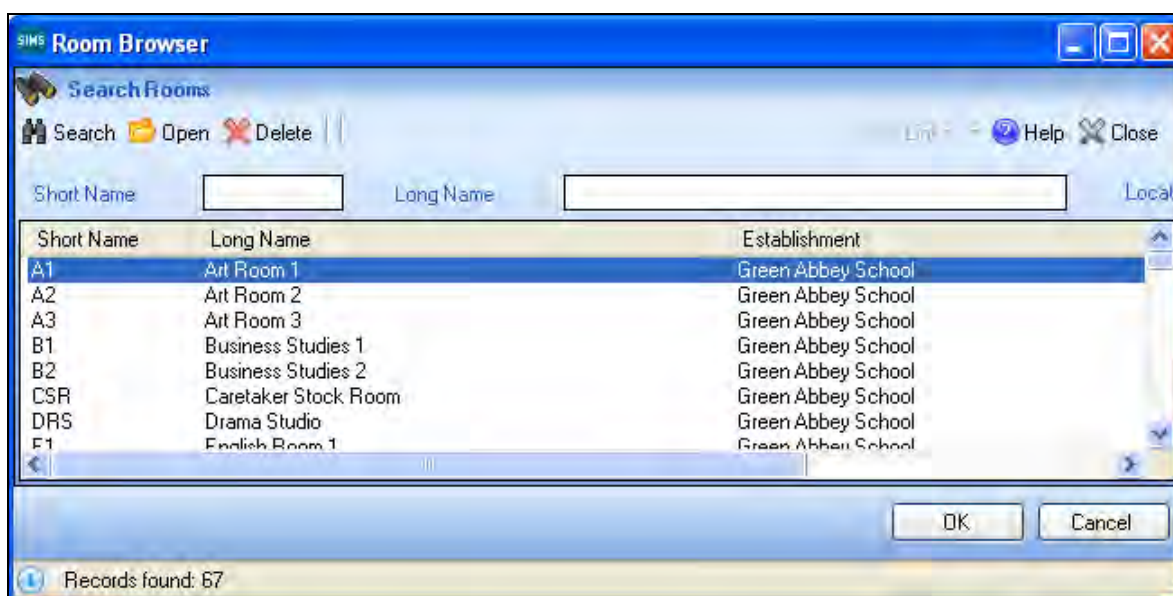
New button



- Select the **Role** from the drop-down list then click the **Browser** button adjacent to the **Person** field to display the **Select Person** browser. Select the required person in the same way as for the Registration Tutor.

*NOTE: By default, the **Role** drop-down list displays **Supervisor**, **Pastoral Manager** or **Joint Main Supervisor**, but these may have been changed or added to by the System Manager.*

- Click the **OK** button on the **Supervisor Properties** dialog to select the person as the Supervisor for the registration group return to the **Registration Group** dialog.
9. Select the **Room** that will be used by this registration group (if required) by clicking the **Browser** button to display the **Room Browser** dialog.



- Enter either the **Short Name** or the **Long Name** of the room then click the **Search** button. Alternatively, leave all of the fields blank to search for all rooms.
- Highlight the required room then click the **OK** button to return to the **Registration Group** dialog.

10. Click the **OK** button to create the registration group.

☐ **Completed**

Important Note on Editing Registration Group Names

There may be occasions when you wish to rename registration groups in either the current or next year's pastoral structure. This is sometimes required by schools that name their registration groups based on teacher's initials and the teacher then leaves the school.

It is essential that you do not just rename the registration group. This is because the registration group name is recorded in the registration group history. If you change the name, the change is made throughout the history of that registration group so the registration group is recorded as always having been named according to the name change.

*NOTE: To ensure that you do not rename a registration group to a name that already exists, right-click the required **Registration Group** folder in the pastoral structure and select **Reuse Old Registration Groups**. Any registration groups that have previously been deleted are displayed. If the required name is listed, highlight it then click the **OK** button to re-use it rather than create a new registration group with the same name. If the required name is not listed, create a new registration group.*

Please see the following two examples:

Example 1:

A registration group is currently called **8AB** after a teacher named Anita Brown. At the end of the current academic year, Anita moves up with her registration group, which becomes **9AB**.

If you rename **8AB** to **9AB** then all the students in **8AB** are recorded as always having been in **9AB** because the history is also amended.

In this circumstance, all you need to do is to create a new registration group, called **9AB** in the pastoral structure for the new academic year (e.g. 2010/2011) and set the promotion mapping to promote to this registration group at the start of the new academic year. All students in **8AB** move up to **9AB** at the start of the new academic year. Please see *Set up the Promotion Mapping for the New Academic Year* on page 42.

Example 2:

A registration group is currently called **8SL** after a teacher named Sonia Lovell. Sonia is leaving and is replaced by Andrew White during the same academic year.

If you rename **8SL** to **8AW** then all the students in **8SL** is recorded as always having been in **8AW** because the history is also amended.

To correctly change a registration group name:

1. Add a new registration group in the current pastoral structure (e.g. 2009/2010) labelled with the new registration group name (e.g. **8AW**), as described in *Adding Classes (Registration Groups)* on page 23.
2. Delete the old registration group by right-clicking the required registration group name and selecting **Remove** from the pop-up menu to display the **Remove Registration Group** dialog.



3. Select the newly created registration group (e.g. **8AW**) from the **Destination Group** drop-down list. All members from the old registration group will be transferred to the new registration group automatically.
4. Click the **Ok** button to delete the registration group and transfer the student memberships.
5. Click the **Save** button to save the changes.

General Advice

The responsibility for defining the naming convention of registration groups lies with the school. However, you should note that if you use teacher initials, you must carry out the previous instructions each time a teacher leaves or if there are any teaching changes that result in a registration group name change, e.g. teachers change registration group or years mid-year. In addition, you will need to create new registration groups based on the teacher initials for each new academic year as described in *Example 1*. If you wish to use teacher initials, it is far easier if you do not precede the registration group name with the year, e.g. use **SL** rather than **8SL**.

Changing a Year Group's Horizontal/Vertical Structures

There may be occasions where you want the pastoral structure for the new academic year to be different to that of the current year. For example:

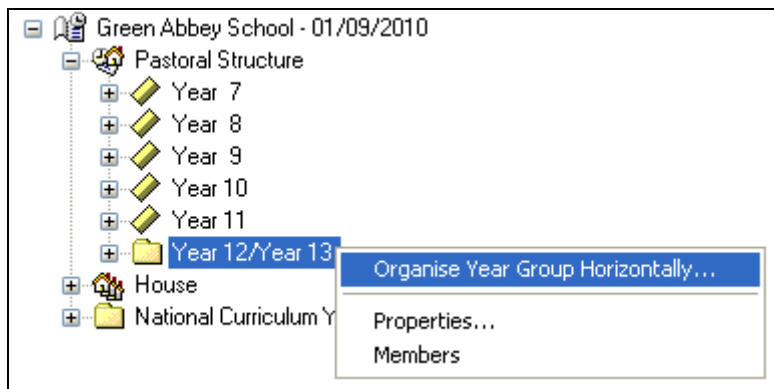
- As a consequence of falling student numbers. This may require you to change from a horizontal to a vertical structure to enable students from mixed year groups to be taught in the same registration group.
- As a consequence of increasing student numbers. This may require you to change from a vertical to a horizontal structure to enable students from the same year to be taught in the same registration group.
- As a consequence of a change in student numbers across the years, e.g. a low birth rate one year, then a high birth rate two years later. This may require you to change to a combined horizontal and vertical structure.

Changing from a Vertical to a Horizontal Structure

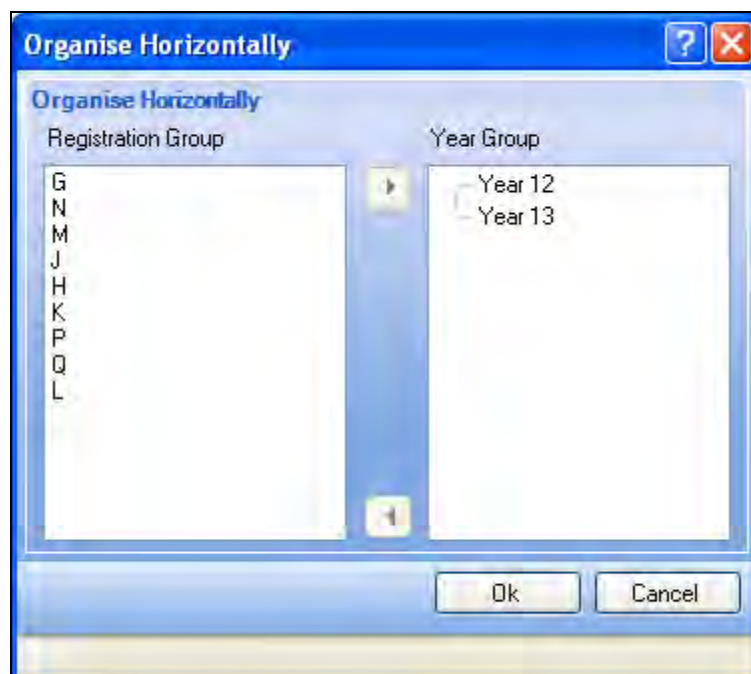
This process may be required if for example, your student numbers have increased. This would enable previously merged years, such as Year 12/Year 13 (vertically structured) to be split into two separate years (horizontally structured) because there are now sufficient students from the same year group to be taught in one registration group.

1. Select next year's pastoral structure as described in *Opening the Structure of the New Academic Year* on page 20.

- Expand the **Pastoral Structure** heading by clicking the + icon. Vertically organised year groups can be identified by their names, separated by a forward slash, e.g. **Year 12/Year 13**.

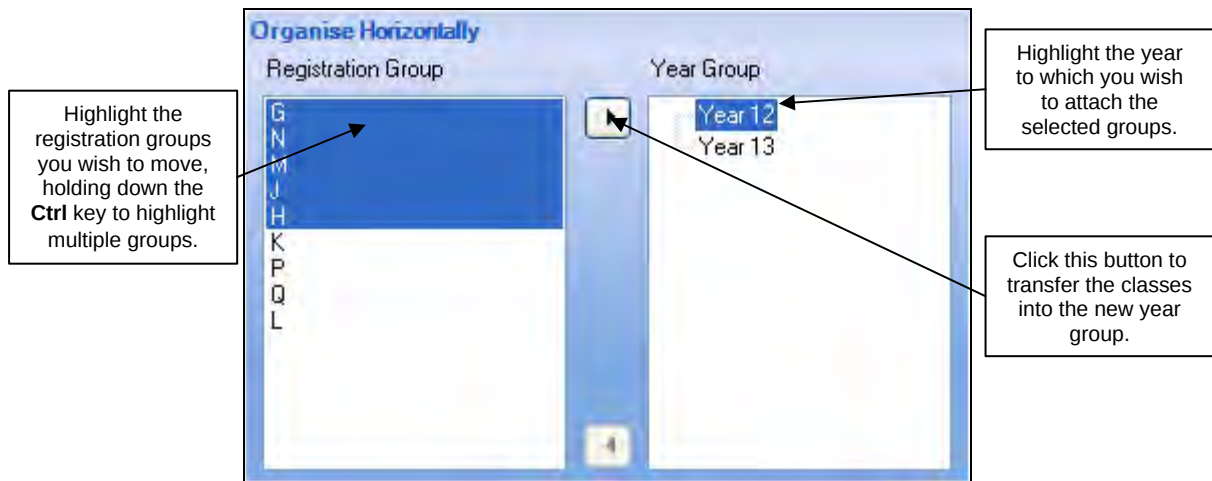


- Right-click the vertically organised year group and select **Organise Year Group Horizontally** from the pop-up menu to display the **Organise Horizontally** dialog.



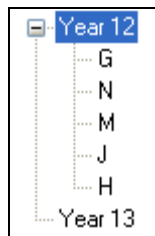
This dialog enables you to determine the registration group(s) that should be attached to each year.

- In the **Registration Group** panel, highlight the registration group(s) you wish to attach to a year (hold down the **Ctrl** key and click the registration group names to highlight more than one registration group) then click the required year group in the **Year Group** panel.

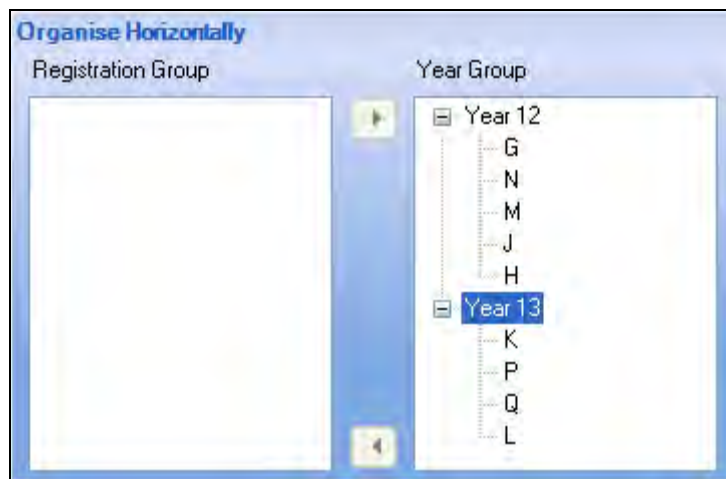


In the previous example, **G, N, M, J, and H** are being attached to **Year 12**.

5. Click the right arrow button in the centre of the dialog to attach the selected registration group(s) to **Year 12**. The registration group(s) is moved under the **Year 12** heading, as shown in the following example.



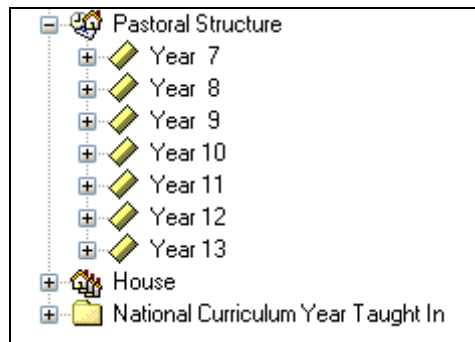
6. Repeat steps 4 and 5 for all the remaining registration groups in the **Registration Group** panel.



NOTE: Each registration group must be attached to a single year group and therefore, the **Registration Group** panel must be empty before you can complete the process.

7. Click the **Ok** button to save the details.

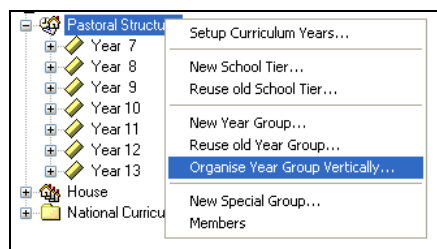
The pastoral structure should now show the two previously merged years as separate years, as shown in the following example.



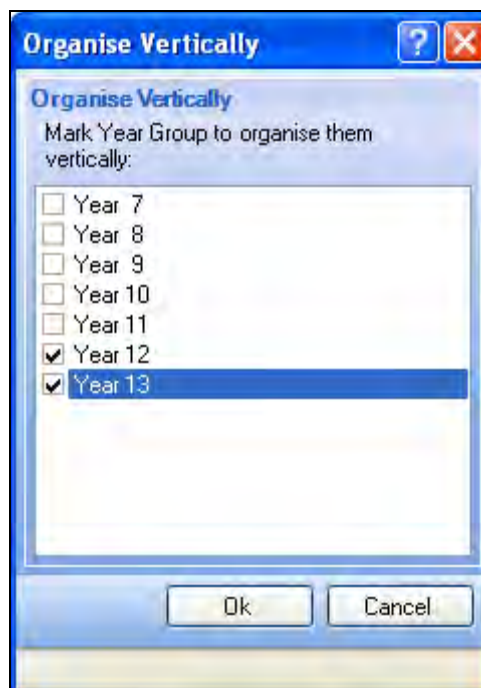
Changing from a Horizontal to a Vertical Structure

This process may be required if, for example, your student numbers have decreased. This could allow previously separate years, such as Year 12 and Year 13 (horizontally structured) to be merged into a single year (vertically structured) because there are insufficient students from the same year group to be taught in one registration group.

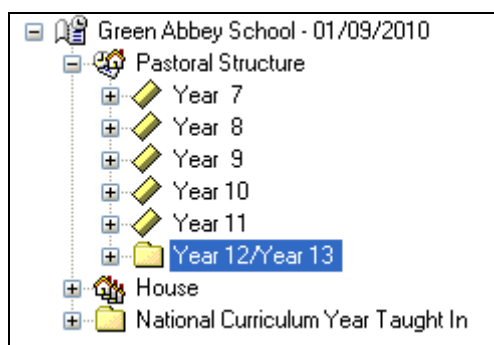
1. Select next year's pastoral structure as described in *Opening the Structure of the New Academic Year* on page 20.



2. Right-click **Pastoral Structure** and select **Organise Year Group Vertically** from the pop-up menu to display the **Organise Vertically** dialog.



3. Select the check boxes of the year groups you wish to merge into a vertical structure then click the **Ok** button. In the previous example, **Year 12** and **Year 13** are being merged into a vertical structure.
4. Click the **Ok** button to merge the selected years, which are then displayed in the pastoral structure separated with a */*, as shown in the following example.



Saving the Amended Pastoral Structure

Once the required changes have been made to the pastoral structure, click the **Save** button to save the structure. This may take some time depending on the number of changes that have been made.

☐ **Completed**

Adding Intake/Admission Groups

Intake and admission groups are used to maintain lists of the applicants who have registered an interest in being taught at your school. It is now possible to create an intake group containing one or more admission groups. In a Secondary school, an intake group could be created for Year 7 with admission groups for either Feeder Schools or Registration Groups.

IMPORTANT NOTES: Please ensure that the **Date of Admission** lies within the new academic year. We recommend that the date of admission is the day on which the applicants will actually arrive in school, i.e. not a teacher training day. However, please check with your Local Authority for advice on the correct date to use if you are unsure.

If you have previously created admission groups with an incorrect **Date of Admission**, amending the date also amends the **Date of Admission** for every applicant who is a member of the group, preventing the need to edit them individually.

If you need to add a new year group but have already created intake/admission groups, you will need to create new intake/admission groups after the additional year group has been added and then move any existing members to the new intake/admission group(s).

This is also a good time to delete or make inactive any unwanted admission groups or make them inactive. For more information, please refer to the appropriate SIMS Admissions Code of Practice handbook.

1. Select **Routines | Admission | Admission Groups | Setup** to display the **Find Intake Group** browser.

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2005 - Autumn - 7	2005/2006	Autumn	Year 7	160	Active
2009/2010 - Autumn Year 7	2009/2010	Autumn	Year 7	250	Active
2009/2010 - Autumn Year 8	2009/2010	Autumn	Year 8	10	Active
2010/2011 - Autumn Year 7	2010/2011	Autumn	Year 7	250	Active

2. Carry out a search to ensure that the intake group does not already exist.

- Click the **New** button to display the **Intake Group Details** page. Mandatory fields are highlighted in red. The page will look slightly different depending on whether you have set up SIMS to allow multiple admission groups to be added. For more information, please refer to the appropriate SIMS Admissions Code of Practice handbook.

In addition, Own Admission Authority schools who have applied a Basic or Full Admissions Licence will see two additional fields (**Admission Policy** and **Numbers to Rank**).

Intake Group Details: New

Save | Undo | Print

1 Intake Group 2 Admission Groups

1 Intake Group

Admission Year: 2010/2011 (dropdown)

Name: [Redacted]

Admission Season: [Redacted] (dropdown)

Year Group: [Redacted] (dropdown)

Planned Admission: [Redacted]

Active: ☒

This **Admission Groups** panel is displayed if multiple admission groups are in use.

2 Admission Groups

Name	Date Of Admiss...
[Empty table body]	

New | Open | Delete

2 Admission Group

Name: [Redacted]

Date Of Admission: [Redacted] (calendar icon)

This **Admission Group** panel is displayed if multiple admission groups are not in use.

- In the **Intake Group** panel, select the **Admission Year** to which the intake group relates (e.g. **2010/2011**) from the drop-down list (this defaults to the current academic year).
- Select the required **Admission Season** (**Autumn**, **Spring** or **Summer**) or, if the intake group does not apply to a specific season, select **Integrated** from the drop-down list.

1 Intake Group

Admission Year: 2010/2011 (dropdown)

Name: 2010/2011 - Integrated Year 7

Admission Season: Integrated (dropdown)

Year Group: Year 7 (dropdown)

Planned Admission: 120

Active: ☒

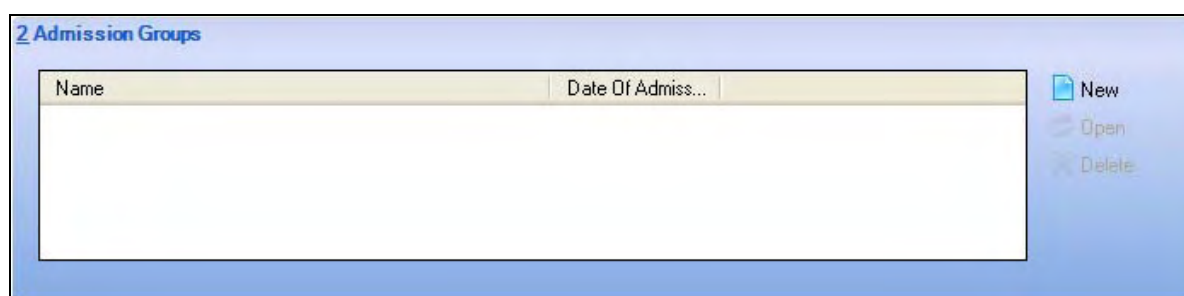
- Select the required **Year Group** from the drop-down list.
- Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field.

8. Only Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can select a previously defined admissions policy from the **Admission Policy** drop-down list. Select a policy, if required.
9. Independent and Own Admission Authority Maintained schools with a Basic or Full Admissions Licence can enter the number of applications that should be ranked in the **Numbers to Rank** field. By default, all applications in an intake are ranked. If you have agreed with your Local Authority that you will rank only a certain number of applications, enter the agreed number in this field.
10. If you press the **Tab** key to move to the **Name** field or click in this field, a default name is supplied for the intake group, based on the **Admission Year**, **Admission Season** and **Year Group**, e.g. **2010/2011 – Autumn Year 7**. The default name can be amended, if required.
11. The **Active** check box is selected by default and indicates that the intake group is available for use. Deselect this check box only if you wish to create intake groups that will be used at some point in the future (they will not be displayed in the **Find Intake Group** browser by default).

Adding One or More Admission Groups

This section is applicable if SIMS is set up to allow the use of multiple admission groups and describes how to add one or more admission groups to an intake group. If you are not sure, please refer to the graphics in the previous section – if the second panel is labeled **Admission Groups**, SIMS is set up to allow multiple admission groups. If the second panel is labeled **Admission Groups**, SIMS is not set up to allow multiple admission groups.

If SIMS is not set up to use multiple admission groups, please proceed to *Adding an Admission Group (Multiple Groups Not Enabled)* on page 34.



1. From the **Admission Groups** panel, click the **New** button to display the **Add Admission Group** dialog.



2. Enter a **Name** for the admission group together with the **Date Of Admission**. Alternatively, click the **Calendar** button and select the required date.

IMPORTANT NOTE: Please ensure that the **Date Of Admission** falls within the applicable academic year. We recommend that the date of admission is the day that the children will actually arrive in school, i.e. not a teacher training day. However, if you are unsure please check with your Local Authority for advice on the correct date to use.

3. Click the **OK** button to add the admission group and return to the **Intake Group Details** page.
4. If any further admission groups are required, click the **New** button and repeat steps 2 and 3.

Intake Group Details: New

Save | Undo | Print

1 Intake Group 2 Admission Groups

1 Intake Group

Admission Year: 2010/2011 Name: 2010/2011 - Integrated Year 7

Admission Season: Integrated Active: ☒

Year Group: Year 7

Planned Admission: 120

2 Admission Groups

Name	Date Of Admiss...
2007 - Year 7 - Autumn	01/09/2010

New
Open
Delete

5. Click the **Save** button to create the intake and admission groups.

Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group. For more information, please refer to the appropriate SIMS Admissions Code of Practice handbook.

Adding an Admission Group (Multiple Groups Not Enabled)

1. Clicking in the **Name** field provides a default name for the group, which can be overtyped as required.

2 Admission Group

Name: Autumn

Date Of Admission: 01/09/2010

2. Enter the **Date Of Admission** for the group.
3. Click the **Save** button to create the intake and admission group.

Once admission groups have been created, you can add any applicants to SIMS and assign them to the required admission group.

☐ **Completed**

Adding Staff Codes and Roles for Timetabled and Cover Staff

To ensure that staff are available for timetabling, their staff codes must be the same in both Nova-T6 and SIMS.

In addition, timetabled staff must be assigned a staff role. Staff can be given one or more roles according to the duties they perform. Generally, a person will have a single Staff Role.

NOTE: Anyone you may wish to make available to provide class cover in Cover 7 or anyone who you may wish to be assign as Additional staff must also be set up as classroom staff, i.e. they must be given a **Staff Code** and a **staff Role**.

For more detailed information, please refer to the *Managing Classroom Staff* chapter in the *Academic Management in SIMS* handbook.

Any staff on the timetable in Nova-T or anyone you wish to make available in Cover 7 who are not displayed in the **Manage Classroom Staff** list must be added.

1. Select **Focus | Person | Manage Classroom Staff** to display the **Find Classroom Staff** browser.
2. Check that the member of staff has not already been allocated a **Staff Code** by selecting the new 2010/2011 academic year from the **Academic Year** drop-down list. By default, the browser displays all staff who have been assigned a **Staff Code** via the Manage Classroom Staff area.

Name	Code	Gender	Role(s)	Subject(s)	Active
Abell, Mrs Anita	AA	F	Teacher	Science, Biology, PSE	Yes
Andrews, Mrs Selina	SA	F	Teacher	Science, PSE	Yes
Asif, Mrs Mina	MIA	F	Higher Level Teaching Assistant		Yes
Atkinson, Mr John	JA	M	Teacher	English	Yes
Blacker, Mr Adrian	AB	M	Teacher	Religious Ed, Geography	Yes
Brown, Mr James	JB	M	Teacher	Voc Stud, Technology, Religious Ed, ...	Yes
Brown, Mr Paul	PB	M	Teacher	Technology, Home Economics	Yes
Burrows, Miss Katie	KB	F	Teacher	Art	Yes
Burton, Miss Fiona	FB	F	Teacher	Mathematics, PSE	Yes
Chase, Mrs Lynn	LC	F	Teacher	Science, PSE	Yes

3. If the required member of staff is not listed they will need to be added. Click the **New** button. If the required staff member is listed, double-click their record then proceed to step 5.

Basic Details

Surname: Forename:

Gender: Date of Birth:

4. Search for the required member of staff by entering the appropriate search criteria in the **Basic Details** panel, then click the **Continue** button. All people recorded in SIMS who match the search criteria entered are displayed in the **Matched People** list.

Matched People
 The following people known to the SIMS database have similar details.
 To add a new person with the details entered above, select New.
 To add an existing person or edit a known person, select Open.

Full name	Gender	Roles	Address
Brown, Mr Paul	Male	Employee, User, Teacher	45 HIGHFIELD ROAD Unit...

New
Open

5. If the required person is listed, highlight their name and then click the **Open** button to display the **Manage Classroom Staff** page.

IMPORTANT NOTE: Create a new record by clicking the **New** button only if you are sure that the person has not already been recorded in SIMS (e.g. as an employee, contact, etc). If they have already been recorded in SIMS, you must select them from the **Matched People** panel.

The **Classroom Staff Details** page displays any existing **Staff Code** and/or **Role(s)**.

Classroom Staff Details: Abell, Mrs A - 2010/2011

Save Undo Print Links Help Unpin Close

1 Basic Details 2 Classroom Information 3 Organisations

1 Basic Details

Surname: Abell
 Forename: Anita
 Midname:
 Title: Mrs.
 Gender: Female

2 Classroom Information

Staff Code (10/11): AA
 Generate Staff Code

Existing code assignments: AA: Abell, Mrs Anita

Subject(s): Science, Biology, PSE
 Edit, Remove, Up, Down

Cover Option: Provides cover

Role(s) as at 01/09/2010

☒ **Teacher**
☐ Higher Level Teaching Assistant
☐ Teaching Assistant
☐ Learning Support Assistant
☐ Classroom Assistant
☐ Technician
☐ Other Supervisor
☐ Other Assistant
☐ Examination Invigilator

Edit, Terminate All

6. The **Staff Code (10/11)** field displays the **Staff Code** assigned to the selected person for 2010/2011. The code can be edited, if required. This updates the **Existing code assignments** list with the name of any staff member whose code matches that which is entered. If the code entered matches a code already assigned to another person, the background colour of the field changes to red and a message is displayed on the Status Bar. It is not possible to save the record until a unique code (across the 2010/2011 academic year) has been entered.
7. Select the staff member's **Role(s)** in the **Role(s)** panel.
8. Click the **Save** button to save the changes.

IMPORTANT NOTE: Once a person has been made a member of Classroom Staff, their Staff Code can be maintained in Academic Management only. It will no longer be possible to edit the code in Personnel 7. In addition, any staff added to SIMS via Manage Classroom Staff are not given an **Employment Start** date. To record the start date, edit their record via **Focus | Person | Staff** ensuring that a **Status of All** is selected when searching in the browser.

☐ **Completed**

Importing Admissions and Transfer Files (ATF)

If your Local Authority has provided you with an ATF file, this should have been imported around March time, as described in the appropriate SIMS Admission Code of Practice handbook. Any additional students can be imported via CTF, as described in the following section.

Importing Common Transfer Files (CTF)

This section provides a summary of the steps required to import a CTF.

Import any CTFs that have not yet been imported. Students with CTFs can be imported into an admission group or directly on-roll. If any of the students in the CTF already exist in the system, any blank fields in their record are updated with data from the CTF. Any existing data is not overwritten, as it is deemed to be the most up-to-date information. Any such information is highlighted in the Exception Log that is displayed at the end of the import process.

Appropriate intake/admission groups must be created before you can import CTF files. For more information, please see *Adding Intake/Admission Groups* on page 31.

1. Select **Routines | Data In | CTF | Import CTF** to display the **Import CTF** page.

Import CTF

1 Data to be Imported 2 Import Selection 3 Exception Log

1 Data to be Imported

Student Basic Details	☒	Student Address	☒	Student Contacts	☒
SEN Information	☒	Assessment Data	☒	School History	☒
Attendance Summary	☒	Looked After	☒		

2 Import Selection

CTF File:

Place new pupils in: Pre-Admission

Pre-Admission Group	Admit On	Year Group
Autumn	01/09/2010	Year 7

3 Exception Log

Number of pupils in file: Number of pupils processed: Number of new pupils:

UPN	Preferred Surname	Preferred Forename	Gender	Date of Birth	Error Description
-----	-------------------	--------------------	--------	---------------	-------------------

2. In the **Data to be Imported** panel, indicate the items you wish to import from the CTF by selecting the appropriate check boxes.
3. In the **Import Selection** panel, browse to the location of the CTF by clicking the **Open** button. Navigate to the required location, highlight the CTF then click the **Open** button to return to the **Import CTF** page.
4. Select **Pre-Admission** from the **Place new pupils in** drop-down list to import the student into an admission group. The **On-roll** option is also available, but it is unlikely that September admissions would be imported directly on-roll.
5. Click the **Import CTF** button to start the import. Details of any errors are displayed in the **Exception Log** at the bottom of the **Import CTF** page.
6. Once you have finished importing the CTF, edit the details of the imported students as required.

For information on changing the status of the application from **Applied** to **Offered**, please refer to the appropriate SIMS Admissions Code of Practice handbook.

☐ **Completed**

Recording Leavers and Updating Course Memberships

This section provides a summary of the steps required to record leaver information in SIMS. For more detailed instructions, please refer to the *Managing Pupil/Students in SIMS* handbook.

The facility to record leavers enables accurate records to be kept of students after they have left the school. During the Summer term you will need to mark most or all of the students as leaving on the same day. You should only mark students as leavers if you are sure they are leaving, e.g. Year 11 are leaving school.

IMPORTANT NOTES: *It is essential that you do not record leavers by removing their date of admission as this affects all historical data relating to that student.*

If someone who was a leaver subsequently returns, please ensure that you re-admit them – do not simply remove their date of leaving as this also affects the history (unless they had a date of leaving, but did not actually leave, i.e. they change their mind).

*To allow the automatic procedures to help you with course completion information for Post-16 students, it is necessary to consider when to make use of the Leavers routine. Some schools will have left the course completion date as the default date when all classes finish. Such a date is not correct for many Post-16 students who will finish the course and leave the school some weeks before the rest of the school finishes for the year. If you make use of the Leavers routine in advance of the students actually leaving, SIMS deals with this problem for you. The end date for the course will be set in line with this 'expected' leaving date and when the School Census is run, the courses will be interpreted as having been completed. If the Leavers routine is run after the students have actually left, and the course end date was in the future, SIMS can only interpret this as a withdrawal or transfer before the course was completed. Obviously, Maintain Course can be run (via **Tools | Academic Management | Course Manager | Maintain Course**) to rectify this for each student, but it is much easier if the Leavers routine is run at the appropriate time.*

*Update Course Memberships should be run (via **Tools | Academic Management | Course Manager | Update Course Memberships**) before moving the system to the new academic year and should be run again after moving to the new academic year, once class information is in place. Update Course Membership is an Academic Management routine and like other routines in this area, it is academic year based. If you forget to run Update Course Memberships before moving to the new year, you can easily solve the problem by going back to the old year and running Update Course Membership.*

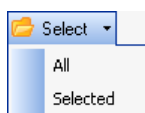
Similarly, if you forget to run Update Course Memberships, as soon as class information is in place, you can run it in the new academic year. However, you should be aware that course membership is much like other group membership, and courses are set active or inactive at the start of the day, depending on what membership they have at the start of the day.

So, if you do not run Update Course Memberships until the actual day of the census, the courses will remain set to inactive until the next day. Active and inactive is only a display parameter, but it could cause unnecessary confusion on census day.

If someone who was a leaver subsequently returns, please ensure that you re-admit them – do not simply remove their date of leaving as this will also affect the history (unless they had a date of leaving, but did not actually leave, i.e. they change their mind).

To ensure that information required for statutory returns, such as the School Census, is accurate and up-to-date, it is recommended that you check that all leavers have at least the minimum statutory information recorded before making them a leaver, e.g. Ethnicity.

1. Select **Routines | Student | Leavers** to display the **Find Student(s)** browser.
2. Search for the required student then double-click their name to display the **Manage Student(s) Leaving Details** page.
3. If you wish to assign a group of students as leavers, search on the appropriate **Year** or **Reg Group** by selecting from the appropriate drop-down lists. Highlight the required students using any of the following methods:
 - To select all the students displayed in the browser, select **All** from the **Select** drop-down menu.



- To select a group of students, highlight them using any of the following methods:
- Hold down the **Ctrl** key and click each student to be selected.
- To highlight sequentially listed students, click the first name in the list, hold down the **Shift** key then click the last name in the list.
- Once the required students have been highlighted, click the **Select** button to add them to the **Students** panel.

The selected students are transferred to the **Students** panel.

Manage Student(s) Leaving Details

Save Print

1 Leaving Information 2 Students

1 Leaving Information

Date of Leaving: 22/07/2010 Reason for leaving: Higher Education (Leaver) Assign to All

Destination after Leaving: Assign to Selected

2 Students

Name	Year Gr...	Reg. Gr...	Adm. ...	Date of Admiss...	Date of Leav...	Reason for Leaving	Destination
Ablett, Michael	13	G	002558	01/09/2003			
Arkan, Baksho	13	J	002671	01/09/2003			
Barlow, Helen	13	P	002638	01/09/2003			
Basty, Amal	13	L	003096	06/02/2006			
Bhaumik, Tarik	13	K	002542	01/09/2003			
Black, Suzanne	13	H	002664	01/09/2003			
Blackett, Yoland	13	J	002676	01/09/2003			
Blakeman, Janet	13	M	002667	01/09/2003			
Bramell, Lynette	13	N	002672	01/09/2003			
Branston, Marlies	13	G	002626	01/09/2003			
Brighton, Tania	13	G	002653	01/09/2003			
Brown, Benonia	13	N	002618	01/09/2003			
Callaghan, Troy	13	M	002545	01/09/2003			
Ching, Himan	13	Q	002525	01/09/2003			
Coles, Sarah	13	L	002613	01/09/2003			
Compton, Anne	13	L	002627	01/09/2003			
Couzins, Clare	13	K	002607	01/09/2003			
Cowdrey, Joanne	13	H	002660	01/09/2003			
Crisp, Adrian	13	J	002554	01/09/2003			
D'Arcy, Emma	13	G	002652	01/09/2003			
Dannell, Kevin	13	G	002591	01/09/2003			

Remove Clear

4. In the **Leaving Information** panel, enter the **Date of Leaving** or click the **Calendar** button then select the required date.
5. Select the **Reason for leaving** from the drop-down list, such as **Higher Education Leaver**.

6. Enter the **Destination after Leaving** if required. Alternatively, apply the **Reason for Leaving** to one set of students (as described in the next step) then enter the **Destination after Leaving** for a different, or subset of students.
7. Highlight the students to which this information applies using the **Ctrl** and **Shift** keys then clicking their names (as described in step 3) then click the **Assign to Selected** button. If the information applies to all the students in the list, click the **Assign to All** button.
8. If an error has been made, highlight the student, correct the information in the **Leaving Information** panel then click the **Assign to Selected** button.
9. To remove a student from the list, highlight their name then click the **Remove** button.
10. To clear the contents of the **Date of Leaving**, **Reason for leaving** and **Destination after Leaving** columns in the **Students** panel, highlight the required students then click the **Clear** button. Re-enter the information as required.
11. Click the **Save** button to save the changes. The selected students are recorded with a date of leaving on the date specified.

 **Completed**

Exporting Common Transfer Files (CTF)

Common Transfer Files can be created and sent to other schools or Local Authorities.

*NOTE: Before proceeding, you must have previously added any required **Feeder** and **Destination Schools** via **Tools | Other Schools** and specified the directory into which the CTF export will be saved via **Tools | Setups | CTF**. For more information, please refer to the Managing Pupil/Students in SIMS handbook.*

*Please ensure that the relevant students are given a **Date of Leaving** before exporting the CTF.*

This section provides a summary of the steps required to export a CTF.

1. Select **Routines | Data Out | CTF | Export CTF** to display the **Export CTF** page.
2. In the **Data to be Exported** panel, ensure that the check boxes relating to the data items you wish to export are selected.

1 Data to be Exported					
Student Basic Details	☒	Student Address	☒	Student Contacts	☒
SEN Information	☒	Assessment Data	☒	School History	☒
		Include KS1 Tasks/Tests	☐		
Attendance Summary	☒	Looked After	☒		

3. Select the status of the students you wish to include in the CTF file from the **View** drop-down list (e.g. **Leavers this year**) in the **Student Options** panel.

2 Student Options					
Effective Date	10/03/2010		View	Leavers this year	
				Include students already exported	☐
					 Refresh Students

4. If you have already created a CTF file for some of the students but wish to include them in this CTF, select the check box to **Include students already exported** in the export file.
5. Click the **Refresh Students** button to update the list of students displayed based on your selections. You can change the display order by clicking any of the column headings.

6. In most circumstances, a single year group will be selected, such as Year 11. This is achieved by selecting the required year from the **Year Grp** drop-down list, as shown in the following graphic.

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Year Taught	Destination LA/Other	Destination School
P820432106006	Abbey	David	9F	9	9		
X820432104001	Abbot	Ben	N	(Custom)	2		
P820432108010	Abbot	Clare	8A	(Blank)	9		
J820444405032	Abbot	Clara	10A	(NonBlank)	10		
D820432106007	Abbot	James	9C	11	10		
H820432106001	Abdelkader	Mohamed	11C	12	11		
V820444405031	Abie	Benjamin	10A	13	12		
G820432103006	Ablett	Michael	G	8	10		
B820200104001	AbuKash	Frederik	10C	13	10		
T820200100036	Ackroyd	Marc	9B	10	9		
L820200100003	Ackroyd	Mary	9B	9	9		
F820444405030	Adar	Geoffrey	10B	10	10		
L820432104002	Adam	Brony	J	12	12		
X820432105002	Adams	James	11A	11	11		
P820432184002	Adams	Kathryn	8B	8	8		
V820444405029	Adams	Louise	10C	10	10		

7. Select the **Destination LA/Other** or **Destination School** by clicking in the appropriate cell then selecting from the drop-down list. This can be done on an individual basis or you can select multiple students as follows:

- Hold down the **Ctrl** key and click each student to be selected.
- To highlight sequentially listed students, click the first name in the list, hold down the **Shift** key, then click the last name in the list.
- To select all the students, right-click anywhere in the table then select **Select All** from the pop-up menu.

UPN	Preferred Surname	Preferred Forename	Reg Grp	Year Grp	Destination LA/Other	Destination School
T820200100065	Baldwin	Steve	6VC	6		
L820200199004	Balley	Richard	6KH	6		
D820200199007	Barker	Robbie	6KH	6		
I820200100053	Bliss	Charles	6VC	6	Bedfordshire	
E820200100055	Bocci	Sophie	6VC	6		
N820200100072	Bond	Tracy	6VC	6		
N820200199015	Braithwaite	Darren	6KH	6		
P820200100063	Choudhury	Nafaz	6KH	6		
X820200100002	Clayton	Rosy	6KH	6		
Z820200199043	Friers	Marcus	6KH	6		
C820200199045	Gambioni	Peter	6VC	6		

8. Click the **Export CTF** button to create the export file.

After the file has been created, any errors are displayed in the **Exception Log** panel, together with the number of students in the file, the number processed and the number not exported.

3 Exception Log						
Number of pupils in file:		23	Number of pupils processed:		23	Number of new pupils: 23
UPN	Legal Surname	Legal Forename	Gender	Date of Birth	Error Description	
Q902280040284	GRAY	Annabelle	F	04/06/1994	Ethnicity Source missing or invalid and was therefore not	
L792105619433	AMRAN	Meeta	F	10/04/1994	Student's postcode is missing or invalid	

Any errors must be corrected before the student can be successfully included in the CTF export file.

9. Navigate to the location of the **CTF Export Directory** (as defined in **Tools | Setup | CTF**), then identify the newly created XML file for export. The CTF can be transferred by a local secure file transfer mechanism, such as School to School (s2s – www.teachernet.gov.uk/S2S). Please contact your Local Authority if you are unsure how to transfer the CTF.

☐ **Completed**

Setting up the Promotion Mapping for the New Academic Year

Setting up the promotion paths for the pastoral structure plays a key part in the end of year procedures and ensures that students move from their current year group and registration group into the correct year group in the new academic year. This process is used to set the path for year groups and registration groups, but it is also possible to specify a promotion path for individual students in case there are any exceptions. For more information, please see *Viewing/Setting the Promotion Path for Individual Students* on page 44.

Setting the promotion mapping can be carried out at any point, as the promotion itself occurs at the beginning of the next academic year. However, it must be done before the start of the academic year.

You can repeat the process a number of times until you are happy that all students have been allocated to the appropriate registration groups.

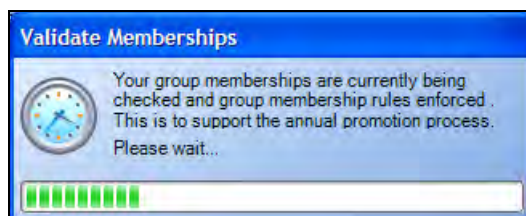
BEFORE PROCEEDING: Please check that you have carried out the following:

- Recorded any changes to teaching staff (added new teachers, added dates of leaving for any leavers).
 - Created the new academic year.
 - Amended your pastoral structure as required, such as adding new registration groups.
-

1. Select **Routines | School | Promotion** to display the **Promotion Data Check** dialog. You are advised that student data needs to be prepared (all current group memberships are checked and confirmed).



2. Click the **Ok** button to display the **Validate Memberships** message dialog, which shows the progress of the validation process.



This process may take some time to complete. Once the validation process is complete, the **Setup Promotion Mapping** dialog is displayed.

3. The current academic year should be selected automatically from the **Promote from** drop-down list. If it is not selected automatically, select it from the drop-down list.
4. Click the **Load** button.

WARNING: *It is imperative that you select the correct academic year otherwise any changes made will affect the wrong year and it will be very difficult to rectify.*

5. The **Year Group** panel is populated with a default set of promotion paths (where one year is promoted to the next, i.e. Year 7 is promoted to Year 8 and so on). This is the same for both vertically or horizontally structured schools. If you wish to return to this setting at any point in the future, click the **Set Default** button.
6. Change the promotion path if required, by clicking the required year group in the **Promotion Path** column then selecting the required year from the drop-down list.

Setup Promotion Mapping from Academic Year 2009/2010

Academic Year: Promote from: Academic Year 2009/2010 [Load]

Year Group

Year Group	Promotion Path
7	8
8	9
9	10
10	11
11	12
12	13

Override membership: ☐ [Set Default]

Registration Group

Year	Registration Group	Promotion Path	Registration Tutor	Promote Registration Tutor	Promote Other Supervisors
Year 7	7A	8C	Mr Brian Kintoss	☐	☐
Year 7	7B	8B	Miss Janice Young	☐	☐
Year 7	7C	8C	Mr Richard Davidson	☐	☐
Year 7	7D	8D	Mrs Fiona Turner	☐	☐
Year 7	7E	8E	Mr Christopher Hughes	☐	☐
Year 7	7F	8F	Dr Roger McNamara	☐	☐
Year 8	8A	9A	Miss Jill Foster	☐	☐

Override membership: ☐ [Finish]

7. Review the promotion path for each registration group. The **Registration Groups** panel displays a list of the registration groups for the current academic year. Select the registration group to which the student will be promoted from the **Promotion Path** column drop-down list. Repeat this process for all the registration groups in the **Registration Groups** panel.
8. The **Registration Tutor** column displays the name of the current registration group tutor. If you want the tutor of the registration group to be promoted into the next academic year with the registration group, select the **Promote Registration Tutor** check box.
9. If any existing Classroom Assistants or Learning Support Assistants should be promoted into the next academic year with the registration group, select the **Promote Other Supervisors** check box.
10. Select the **Override Membership** check box in both the **Year Group** and **Registration Groups** panels the first time you carry out the promotion mapping process.

This ensures that any existing memberships (however they were defined) are overwritten. If you repeat the promotion process, you can decide whether to overwrite the existing memberships by selecting the check box as required. For example, if you had originally stated that students in the **7D** registration group should be promoted to the **8D** registration group and subsequently wanted them to go from **7D** to **8D**, you would need to select the **Override Membership** check box in the **Registration Groups** panel.

IMPORTANT NOTE: If you already carried out this process to set up your mappings and you now wish to edit them, please ensure that the **Override Membership** check box is not selected if you wish to retain your previous memberships.

11. Click the **Finish** button to save the settings.
12. Click the **Map** button on the toolbar at any point to return to the **Setup Promotion Mapping** dialog. SIMS displays the **Promote Pastoral Groups** page, which lists the current year groups.

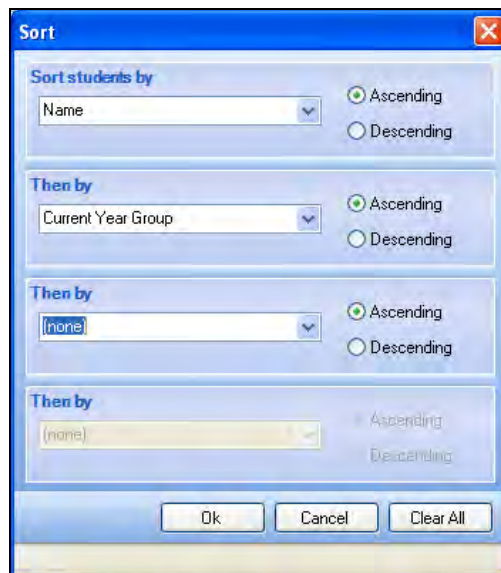
Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
+ Current Year Group: 7					
+ Current Year Group: 8					
+ Current Year Group: 9					
+ Current Year Group: 10					
+ Current Year Group: 11					
+ Current Year Group: 12					
+ Current Year Group: 13					

Viewing/Setting the Promotion Path for Individual Students

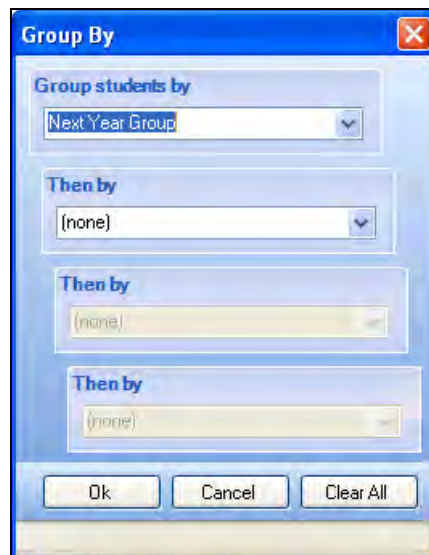
1. Double-click the current year group for which you wish to view or set individual promotion paths.

Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group	
+ Current Year Group: 7						
+ Current Year Group: 8						
- Current Year Group: 9						
Abbey, David	☐	9	10	9F	10F	
Abbot, James	☐	9	10	9C	10C	
Ackroyd, Marc	☐	9	10	9B	10B	
Ackroyd, Mary	☐	9	10	9B	10B	
Addison, Millie	☐	9	10	9D	10D	
Adey, Marc	☐	9	10	9C	10C	
Ambrose, Chaz	☐	9	10	9B	10B	
Amis, Joshua	☐	9	10	9A	10A	
Anderson, Loren	☒	9	10	9E	10E	10E
Andrews, Lisa	☐	9	10	9A		Short Name
Ariano, Pietro	☐	9	10	9A		
Armbruster, Abbie	☐	9	10	9E	10A	
Ashfield, Angela	☐	9	10	9A	10B	
Ashton, Harry	☐	9	10	9A	10C	
Banfield, Paul	☐	9	10	9E	10D	
Barham, Melissa	☐	9	10	9B	10E	
Bateman, David	☐	9	10	9C	10F	
Becker, Boris	☐	9	10	9B		
Bennet, Michael	☐	9	10	9C	10B	
Bennett, Keith	☐	9	10	9B	10C	
Benter, Fran	☐	9	10	9A	10B	
Bibby, James	☐	9	10	9D	10A	
Birch, Sam	☐	9	10	9B	10D	

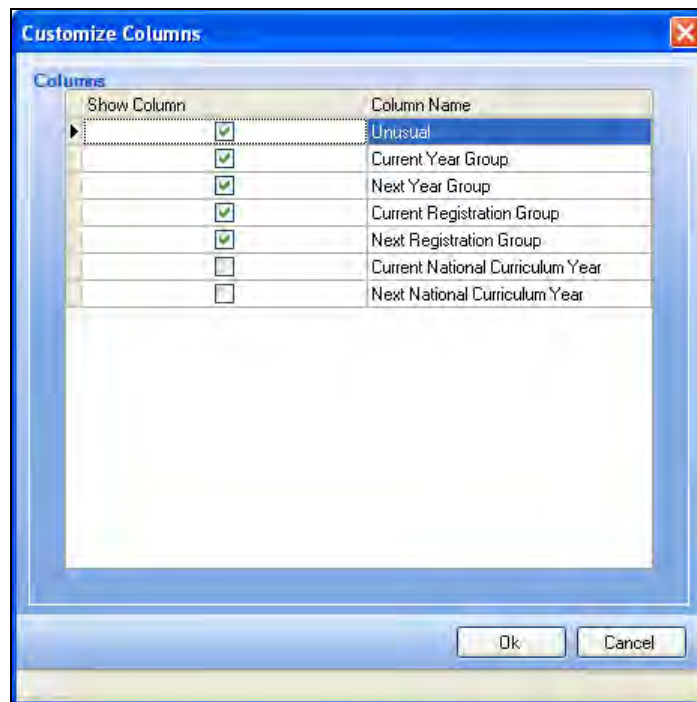
2. You can customise the view on this screen by selecting an option from the **Customize** drop-down list.
 - Select **Sort** to display a **Sort** dialog, which enables you to order the contents of the columns, as shown in the following example.



- Click the **Customize** button down arrow and select **Group By** to display the **Group By** dialog, which enables you to change the groupings, as shown in the following example.



- Select **Columns** to display the **Customise Columns** dialog, which enables you to choose the columns you wish to include in the display.



3. Once expanded, you can change the year or registration group for individual students by clicking in the appropriate column and selecting a different year or registration group from the drop-down list. The change appears in red and the **Unusual** check box is selected automatically to indicate that the change falls outside the normal mapping (set previously using the **Setup Promotion Mapping** dialog). Repeat the process for any other students, if required.

Multiple students can be highlighted using any of the following methods:

- Hold down the **Ctrl** key then click each student you wish to select.

McLear, Jessica	☐	9	10	9C	10C
Meally, Michelle	☐	9	10	9A	10A
Mehar, Sabrina	☐	9	10	9C	10C
Meredith, Daniel	☒	9	10	9F	10F
Moner, Jodi	☐	9	10	9E	10E
Moody, Shaun	☒	9	10	9B	10B
Moore, Steven	☒	9	10	9A	10A
Morrow, Jennifer	☐	9	10	9B	10B
Morton, Vicki	☒	9	10	9A	10A
Mullin, Ben	☐	9	10	9D	10D
Mumford, Connor	☒	9	10	9F	10F
Murphy, Alexandra	☐	9	10	9B	10B
Murphy, Connor	☐	9	10	9B	10B

- To highlight sequentially listed students, click the first name in the list, hold down the **Shift** key then click the last name in the list.

NOTE: If the **Filter** button is selected, all **Year Groups** and registration groups are available for selection from the drop-down lists, not just those that are associated with the chosen **Year Group** or **Registration Group**.

A screenshot of a software interface showing a dropdown menu titled 'Short Name'. The menu contains a list of year groups: 7, 8, 9, 10, 11, 12, and 13. The year group '10' is highlighted in blue, indicating it is the selected option. At the bottom of the dropdown, there is a small 'x' icon.

*For example, a student currently in **Year Group 9** would normally be expected to promote into **Year Group 10**. It is possible (for whatever reason) that this student will actually be promoted into **Year Group 11** in the forthcoming academic year. To enable you to achieve this, click the **Filter** button and select the required **Year Group** and **Registration Group** from the drop-down lists.*

4. Click the **Save** button to save the promotion mappings. The promotion occurs at the beginning of the next academic year. A warning is displayed if any unusual promotions have been set. Accept the warning by clicking the **Yes** button.

☐ **Completed**

Checking the Registration Tutors Assigned

Once the promotion mapping process is complete, you are strongly advised to check the registration group assignments in the pastoral structure.

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure**.
2. Click the **+** icon adjacent to **Pastoral Structure** to reveal each registration group.
3. Right-click the name of each **Registration Group** and select **Properties** from the pop-up menu to display the **Registration Group** dialog.
4. If necessary, add or change the **Registration Tutor** by clicking the **Browser** button, searching for then selecting the required person. Click the **OK** button.
5. If two registration tutors share the group, click the **New** button adjacent to the **Supervisors** table to display the **Supervisor Properties** dialog. Select the **Role** of **Joint Main Supervisor** from the drop-down list then select the required person by clicking the **Browser** button then searching for and selecting the required person from the **Select person** dialog. Click the **OK** button to confirm the selection.
6. Click the **OK** button to return to the pastoral structure then click the **Save** button once you have assigned all the required registration tutors.

☐ **Completed**

Changing the Status of Applications to Offered or Accepted

This section describes how to change the status of applications to your school for the forthcoming academic year in bulk. Applications can be added manually or imported via ATF or CTF. When added, an application is automatically given a status of **Applied**. If required, you can then offer places to applicants you wish to join your school (**Offered**) and then change the status of the application to **Accepted** once you have received confirmation that they will be joining. It is possible however, to change an application status from **Applied** to **Accepted** or even straight to **Admitted**, if required. It is also possible to change the application status of individual applicants.

This section assumes that you have added all of the required applicants via **Focus | Admission | Application** and that you have imported via CTF or ATF. For more information, please refer to the appropriate SIMS Admissions Code of Practice handbook.

NOTE: Applicants who you wish to allocate to curriculum classes must have an application status of **Accepted** before they can be assigned to curriculum classes and their timetable can be produced. If Options is in use, their application status will already have been changed to **Accepted** so that they could be assigned to bands and be imported into Options.

Finalising Offers

If you wish to offer places to applicants, please follow the instructions outlined in this section. If you do not want to record offers made, but wish to identify applicants who have accepted a place at your school, please proceed to *Accepting Applicants* on page 49.

1. Select **Routines | Admission | Finalise Offers** to display the **Find Intake Group** browser.

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2005 - Autumn - 7	2005/2006	Autumn	Year 7	160	Active
2009/2010 - Autumn Year 7	2009/2010	Autumn	Year 7	250	Active
2009/2010 - Autumn Year 8	2009/2010	Autumn	Year 8	10	Active
2010/2011 - Autumn Year 7	2010/2011	Autumn	Year 7	250	Active

2. Search for then double-click the required intake group to display the **Finalise Offers** page.

1 Summary

Planned Admission	170	Offered	0
Total Applicants	20	Accepted	0
Applied	20	Withdrawn	0
		Admitted	0
		Rejected	0

2 Applications

Late	Name	Gender	DOB	App. Status	Applied	Offered	Rejected
☐	Anderson, Jacob	Male	23/05/1999	Applied	✓		
☐	Bellini, James	Male	12/11/1996	Applied	✓		
☒	Gharu, Vipul	Male	22/04/1997	Applied	✓		
☐	Graves, Sophie	Female	15/12/1996	Applied	✓		
☐	Hobbs, Anna	Female	23/06/1997	Applied	✓		
☐	Holt, Siena	Female	21/02/1997	Applied	✓		
☐	Iqbal, Sara	Female	10/07/1997	Applied	✓		
☐	Jacobs, Eva	Female	14/08/1997	Applied	✓		

The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied**. Own Admission Authority schools are also provided with the **Late Applications** field.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, **Admitted** and **Rejected** (Independent schools only) are updated as applicable information is edited and saved.

The **Applications** panel shows all the applicants who have applied for a place at your school, together with the status of their application.

3. To change the application status, click the required cell for each applicant, as shown in the following graphic.

Finalise Offers - 2010/2011 - Autumn Year 7

Save | Undo | Print | Help | Unpin | Close

1 Summary 2 Applications

1 Summary

Planned Admission	170	Offered	0
Total Applicants	20	Accepted	0
Applied	20	Withdrawn	0
		Admitted	0
		Rejected	0

2 Applications

	Late	Name	Gender	DOB	App. Status	Applied	Offered	Rejected
		Anderson, Jacob	Male	23/05/1999	Applied		✓	
		Bellini, James	Male	12/11/1996	Applied		✓	
		Gharu, Vipul	Male	22/04/1997	Applied	✓		
		Graves, Sophie	Female	15/12/1996	Applied		✓	
		Hobbs, Anna	Female	23/06/1997	Applied		✓	
		Holt, Siena	Female	21/02/1997	Applied	✓		
		Iqbal, Sara	Female	10/07/1997	Applied		✓	
		Jacobs, Eva	Female	14/08/1997	Applied		✓	

Accepting Applicants

This section describes how to record applicants who have accepted a place at your school. This is achieved by changing the application status to **Accepted**.

1. Select **Routines | Admission | Accept Applications** to display the **Find Intake Group** browser.

Find Intake Group

New | Search | Open | Delete | Print | Browse | Next | Previous | Links | Help | Close

Name: Admission Season: <Any> Status: Active

Admission Year: <Any> Year Group: <Any>

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2005 - Autumn - 7	2005/2006	Autumn	Year 7	160	Active
2009/2010 - Autumn Year 7	2009/2010	Autumn	Year 7	250	Active
2009/2010 - Autumn Year 8	2009/2010	Autumn	Year 8	10	Active
2010/2011 - Autumn Year 7	2010/2011	Autumn	Year 7	250	Active

2. Search for then double-click the required intake group to display the **Accept/Decline Applications** page.

1 Summary

Planned Admission	250	Accepted	0
Total Applicants	235	Withdrawn	1
Applied	78	Rejected	12
Offered	153	Admitted	0

The **Summary** panel displays figures for the **Planned Admission**, **Total Applicants** and the number of applicants who have **Applied** for, or been **Offered**, a place at your school.

Figures for the number of places **Offered**, **Accepted**, **Withdrawn**, **Admitted** and **Rejected** (Independent schools only) are updated as applicable information is edited and saved.

2 Applications

Current Application Status:

Name	Gender	DOB	Application Status	Offered	Accepted	Withdrawal
Caldwell, Ley	Female	04/01/2005	Offered	✓		
Dahl, Sandra	Female	12/10/2004	Offered	✓		
Gambioni, Peter	Male	31/03/2005	Offered	✓		
JACKS, Gary	Male	23/07/2005	Offered	✓		
Magnus, Olga	Female	19/12/2004	Offered	✓		
Taghavi, Jilna	Female	13/12/2004	Offered	✓		
VEKANYA, Nita	Female	16/04/2005	Offered	✓		
Zabidi, Julie	Female	01/01/2005	Offered	✓		

The **Applications** panel displays by default, all applicants with an application status of **Offered**. The display includes the **Name**, **Gender**, date of birth (**DOB**) and **Application Status** of each applicant, together with a tick grid that enables the application status to be amended.

- Click the **Accepted** column for each applicant who has accepted a place at your school.

2 Applications

Current Application Status:

Name	Gender	DOB	Application Status	Offered	Accepted	Withdrawal
Caldwell, Ley	Female	04/01/2005	Offered	✓		
Dahl, Sandra	Female	12/10/2004	Accepted		✓	
Gambioni, Peter	Male	31/03/2005	Accepted		✓	
JACKS, Gary	Male	23/07/2005	Offered	✓		
Magnus, Olga	Female	19/12/2004	Accepted		✓	
Taghavi, Jilna	Female	13/12/2004	Accepted		✓	
VEKANYA, Nita	Female	16/04/2005	Offered	✓		
Zabidi, Julie	Female	01/01/2005	Accepted		✓	

- If you wish to accept applicants with a status of **Applied**, select **Applied** from the **Current Application Status** and follow this same process.
- Once complete, click the **Save** button to save the changes. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list is empty.

☐ Completed

Nova-T6 and Partnership Xchange

Partnership Xchange connects the SIMS systems of schools that share students in a partnership or consortium, ensuring that student core data is kept up-to-date and enables the exchange of class memberships, lesson attendance marks and assessment data.

The *Partnership Functions* chapter of the *Nova-T6* manual describes the functionality in Nova-T6 that supports Partnership Xchange. In particular, it describes the steps that partnership management should undertake to ensure that the schools in the partnership operate matching timetables, and moreover enables future communications between these schools, specifically regarding student class memberships.

Ideally, the shared aspects of the consortium timetable (for example the Option blocks in years 12 and 13) should be designed centrally and then distributed to each of the schools for inclusion in their own systems at an early stage in the timetabling process.

Transferring the Curriculum and Timetable to SQL

The curriculum plan and timetable in Nova-T represents a *snapshot* of how classes are organised and scheduled. Once complete, this data must be transferred to SQL.

NOTES: If you use Cover 7 and you use non-teaching registration periods to provide registration cover, ensure that you have set up these registration periods as non-teaching in your cycle. There is no need to make changes to your period type settings.

Preparing for Export to SQL Using Curriculum Matching

Before you carry out a transfer of curriculum and timetable data to SQL, you should carry out these steps:

1. Make sure that the Document Management Server is active (in SIMS, check **Tools | Setups | Document Management Server**).
2. If you have not done so recently, run **Tools | System Diagnostics | Database Diagnostics** in SIMS.

Manage Classroom Staff

When the timetable is imported, the wizard attempts to match the staff codes mentioned in the import file with the staff codes in Manage Classroom Staff for the relevant academic year. When the 'next' academic year was created, Classroom Staff will have been carried forward into it, i.e. Classroom Staff with a staff code in the current academic year *and* a staff role on or after the last day of the *current* academic year, will have been given a staff code in the *next* academic year.

Classroom Staff added subsequently to the current academic year will also have been carried forward to the next. However before attempting to transfer the new timetable, it is worth checking the classroom staff list for the next academic year.

1. Select **Focus | Person | Manage Classroom Staff** to display the **Find Classroom Staff** browser.
2. Check that the member of staff has not already been allocated a **Staff Code** by selecting the new 2010/2011 academic year from the **Academic Year** drop-down list. Select **Yes** from the **has staff code?** drop-down list.
3. Click the **Search** button then inspect the list of classroom staff returned. If any staff to be imported on the timetable are not present, you will need to add them, as described in the *Academic Management in SIMS* handbook.

Starting the Export from Nova-T6

Before the export can be completed, the Timetabler needs to assign levels to classes in Nova-T6 via **Tools | Assign Levels** (where Nova-T6 has been used to construct the new timetable).

1. Ensure that you have loaded the relevant SPL file for the new academic year then select **Data | Export Curriculum and Timetable to SQL**.

As the academic data stored in the SQL database is historical, a date range for the exported data must be provided so that the records transferred have start and end dates. In this case, as you are setting up the timetable for the coming year you should pick a date range corresponding to the whole of the working academic year (typically a date early in September to a date in June or July).

2. If prompted, you should log into the SQL database with a suitable user name and password.

The Curriculum Matching Wizard

A number of validation checks are carried out on your data prior to the first page being displayed. For example:

- the supplied start and end date must lie within a single academic year.
- the supplied start and end date must lie within a single timetable cycle.
- the shape of the supplied timetable cycle must match the one in SQL. One exception to this is that the transfer is still allowed on the first export of non-teaching periods to SQL.

If any of these checks fail, the transfer will be unable to proceed. Click the **Help** button for further information on resolving these issues or refer to *Curriculum Matching* in the *Nova-T6 Links* chapter in the *Nova-T6* handbook.

Otherwise if all the checks are passed, you may proceed by clicking the **Next** button.

NOTES: The whole curriculum will be unlinked as there is nothing in the database for the new academic year to which the bands, block groups and classes can be linked.

*All items on the left-hand side of the **Merge Curriculum** page are highlighted in orange because they are unlinked. This is as expected.*

Similarly on the right, a message is displayed explaining that there is no curriculum data in the database (except bands if these have previously been exported). This is as expected – it refers to the selected academic year.

On subsequent transfers, the appearance will be different, as it is expected that most (if not all) of the submitted curriculum will be automatically matched with the data in the database.

The final page of the wizard prompts you to confirm that you wish to continue with the transfer process. To do this, click the **Submit** button. The submission may take a couple of minutes to execute and during this time a rotating graphic is displayed. After it has completed, click the **Finish** button to close the wizard.

Unmatched Teachers and Rooms

After the wizard has closed, Nova-T6 analyses the data returned and if any teachers or rooms were not found or recognized in SQL, these are listed. In such cases, classes associated with teachers or rooms that could not be identified are recorded in SQL, except that the teacher or room assignment will be missing. Please see *Manage Classroom Staff* on page 51.

NOTE: Teachers will be exported to SQL only if they are employed for the whole of the export date range.

☐ **Completed**

Where Can I Get More Information?

For full instructions on how to run the Curriculum Matching process, please refer to the *Curriculum Matching* section of the *Nova-T6 Links* chapter in the *Nova-T6* handbook.

☐ **Completed**

Exporting Derived Year Classes to SQL

NOTE: Please ignore this section if your school does not use derived years.

Year groups in Nova-T6 are associated with National Curriculum Years (NC Years). A derived Year (e.g. C6), must be associated with one of the existing National Curriculum Years (e.g. NC Year 12). Classes from Year 12 can then be included in the export to SQL. In Academic Management, Year 12 students will be eligible for the C6 classes, and Year 13 students (although ineligible) can be assigned to these classes by clicking the **Add** button.

☐ **Completed**

Arranging Student Memberships

Students need to be allocated to bands, curriculum groups and classes. This can be achieved using any of the following four methods:

- Copying memberships from the previous year using Academic Promotion (as described in *Arranging Student Memberships* on page 52).
- Importing memberships arranged using Options.
- Manual entry, by placing ticks on the tick grids, or using the **Student Curriculum Summary** page.
- Exporting and Importing student memberships using a spreadsheet.

☐ **Completed**

Performing Academic Promotion

The purpose of the Academic Promotion functionality is to generate curriculum memberships in the *next* academic year for all the groups of a scheme in one go, based on equivalent memberships of classes and other curriculum groups in the *current* academic year. There are two steps to the Academic Promotion routine:

1. Setting up the promotion rules via **Routines | School | Academic Promotion Rules**. Please refer to the *Academic Promotion in SIMS* chapter in the *Academic Management in SIMS* handbook for more information.
2. Applying the rules using the **Curriculum Promotion** wizard (from the tick grid on the **Group Memberships in Scheme** page, click the **Allocate** button and select **Curriculum Promotion Wizard**. For more information, please refer to the *Academic Promotion in SIMS* chapter in the *Academic Management in SIMS* handbook).

IMPORTANT NOTE: Before running the Academic Promotion process, you are strongly advised to take a full and verified backup of your SIMS SQL database. This is a powerful process that creates many student group memberships.

Once the promotion rules have been set up, you need to apply the rules using the **Curriculum Promotion** wizard from the **Curriculum Scheme** tick grid as described in *Running Academic Promotion* on page 54.

Important Information Regarding Academic Promotion

Before using the Academic Promotion process, please note the following points:

- Academic Promotion can take place only if the academic year into which promotion is taking place:
 - o has been defined in SIMS (for the purposes of Academic Promotion, only the term start and end dates are required. The remaining dates, such as half-term, training days, etc. can be added at a later date.
 - o contains curriculum data exported from Nova-T6.
 - o has been selected as the *current* academic year in Academic Management.

For example, if you want to promote from academic year 2009/10 to 2010/11, you must select 2010/11 as your current academic year (via **Tools | Academic Structure | Set Academic Year**).

- Once the academic year has been defined, you must run Pastoral Promotion to ensure that the students are in the correct years and National Curriculum years for the new academic year. You must then transfer the curriculum and timetable from Nova-T6 into the new academic year.
- In the majority of Secondary schools, Academic Promotion will apply to years 10-11 and years 12-13, because these pairs of years represent the delivery of two-year courses (GCSE courses are generally delivered during years 10-11 and AS/A Level courses during years 12-13). However, this does not preclude the use of Academic Promotion across other National Curriculum year combinations, such as years 7-8, where you might want to preserve sets in Maths and Modern Languages.

The Academic Promotion process for a scheme in the next academic year is run from its tick grid. A column named **Promotable** is available in the **Find Curriculum Scheme** browser, from which you should open a **Promotable** scheme.

IMPORTANT NOTE: Academic promotion must be run for each scheme whose groups you want to promote with memberships from the previous academic year, one scheme at a time. It is not possible to promote all of the requires schemes at the same time. The reason why there is not a single promotion routine for all schemes, is that it would then be difficult to deal with any exceptions that might arise. It is important to promote the schemes in a logical order, starting with the band schemes and progressing down to the block schemes and non-singleton cluster schemes (cluster schemes with more than one destination group, e.g. a cluster scheme that provides a linked class arrangement).

The **Curriculum Promotion** wizard can create a group membership in the new academic year for a student only when certain conditions are fulfilled. At each stage, there might be individual students who do not meet these conditions. The promotion routine will report these and you will need to consider them on an individual basis. Such exceptions might be evidence of errors in the data, such as missing National Curriculum year memberships, or of multiple or missing memberships within the scheme in the previous academic year. You must resolve these and other cases manually.

The promotion process can be repeated as many times as you want for the same scheme, until the promotion is performed to your specific needs. For example, a promotion could be performed based on a **Reference Date** of 10th June and later repeated for the **Reference Date** of 18 July, which is nearer to the end of the Summer term. This would be particularly useful if there is a change to the student population or a change to the group memberships for the selected scheme, perhaps due to an end-of-year assessment.

NOTE: The **Reference Date** is the date student group memberships are read, in order to populate group memberships in the new academic year.

Advice on Running Academic Promotion

It is strongly recommended that you promote bands before promoting any other groups. Promoting students to their new groups higher up the hierarchy ensures that they will automatically be eligible for memberships lower down the hierarchy for the appropriate groups.

For example, assigning a student to band 7x automatically makes them eligible for the groups associated with 7x Maths, 7x English, 7x Science, etc. If bands are not promoted first, all students in year 7 would be ineligible for membership of all the groups associated with that year.

Promoting bands first would also lead to a reduction in the number of warning messages being displayed when running Academic Promotion.

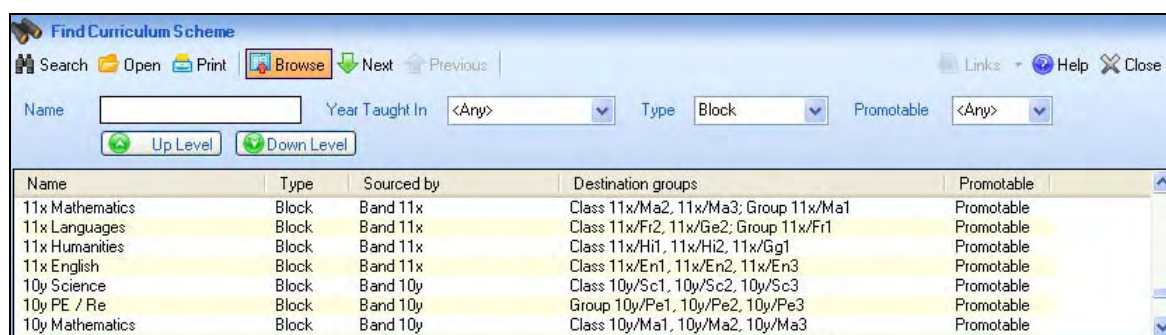
Running Academic Promotion

IMPORTANT NOTE: Before running the Academic Promotion process, you are strongly advised to take a full and verified backup of your SIMS SQL database. Changes to student group memberships are not saved to the database until you take the conscious decision to click the **Save** button on completion of the promotion. However, this is a powerful process that creates many student group memberships.

The Academic Promotion process must be run for *each* of the schemes you wish to promote. Once the promotion has been performed on a scheme, it can be saved and you can move onto the next one.

Academic Promotion can be run as many times as required. This would be particularly useful if a group was inadvertently removed from the promotion process and the data was saved. Even if the data is saved, the process can be run again and this will correct the data. The most recent promotion of a scheme will be set as *current* in the database.

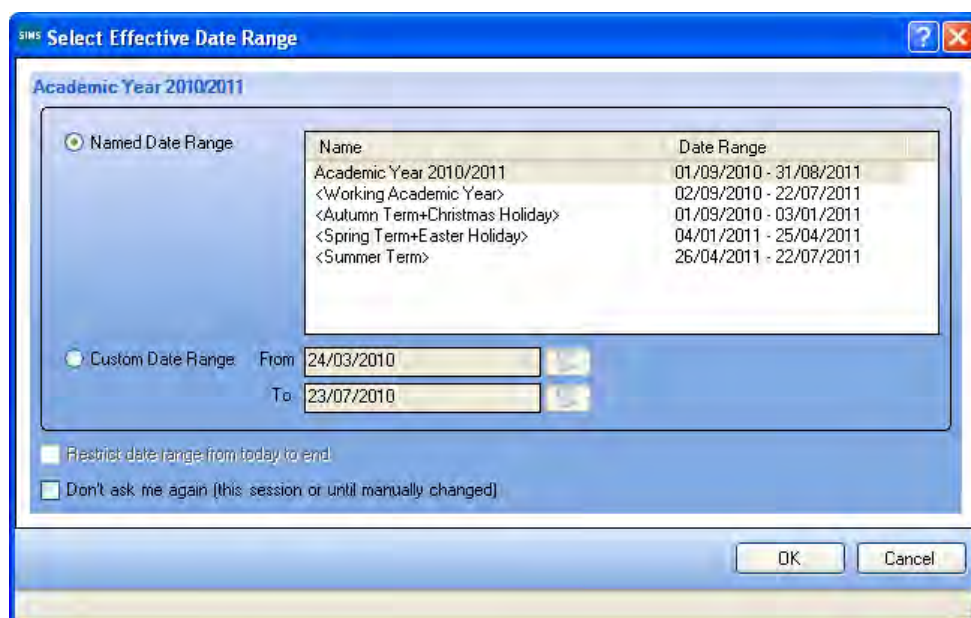
1. Select **Focus | School | Academic Structure | Curriculum Assignment by Scheme** to display the **Find Curriculum Scheme** browser.



2. Enter search parameters and click the **Search** button to display all of the schemes in the curriculum plan or press **Enter** without entering any search parameters.

NOTS: Setting the promotion rules via **Routines | School | Academic Promotion Rules** places **Promotable** in the **Promotable** column of the **Find Curriculum Scheme** browser. A scheme displaying **Promotable** has at least one destination group that is the target of a promotion path defined in SQL. Any scheme with a blank **Promotable** column cannot be promoted, as no promotion path that points at any of its groups has been defined. It will not be possible to run the **Academic Promotion** wizard for schemes that display a blank.

- Highlight the required scheme and click the **Open** button to display the **Select Effective Date Range** dialog.



- Select a date range from the **Named Date Range** list or select a **Custom Date Range** to be used for the Academic Promotion and click the **OK** button to display the tick grid.

New memberships created by the promotion process will be for the date range selected here. For example, you could select the predefined dates for the following academic year. The selection defaults to the **Working Academic Year** of the currently selected academic year, which will usually be the appropriate option for this purpose.

- Select the mode in which you wish to work, either **Relaxed Mode** or **Strict Mode**.

Click the **Relax** button to suspend the eligibility rules so that students can be allocated to groups for which they are ineligible.



Relax button

Once you have clicked this button, the background on the button changes to indicate that relaxed mode is selected.

Alternatively, if you want to ensure that eligibility rules for student class memberships are enforced (**Strict Mode**), make sure that the button is deselected. Strict mode is the default.

- Start the Academic Promotion process by clicking the **Allocate** button and selecting **Curriculum Promotion Wizard** from the pop-up menu.



Allocate button

Follow the instructions provided in the wizard. On opening the wizard, a warning indicates that any student tags or selections on the tick grid are removed if you proceed. This is because tagging is used to indicate any students for whom a membership was not created by the promotion process.

If you need to make a note of the tagged and/or selected students before they are cleared, click the **Cancel** button to return to the tick grid. Start the **Curriculum Promotion** wizard again when you are ready.

Any filters that have been set to restrict the students listed in the tick grid will apply when promoting the selected scheme. Students who are filtered out are excluded from the promotion process. The names of these students are displayed later in the process.

7. Click the **Next** button to display the **Confirm Dates** page.

The **Effective Date Range** used in the tick grid for the next academic year is displayed together with an editable **Reference Date** (the date on which student memberships are read in order to populate group memberships in the new academic year).

If the **Effective Date Range** displayed is incorrect, click the **Cancel** button to close the wizard and edit the **Effective Date Range** in the tick grid.

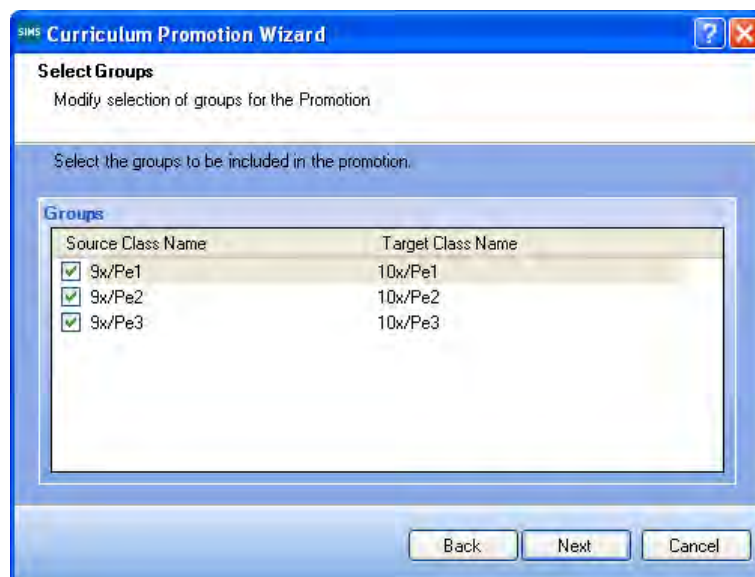
8. Select the **Reference Date** for the Academic Promotion by clicking the **Calendar** button and selecting a date from the calendar.



Calendar button

The **Reference Date** defaults to the day prior to the start date of the new academic year, but it is probable that there will be no student memberships then. The date used must lie within the academic year prior to the new academic year and often would be chosen near, or possibly at the end of, the Summer term. However, if your school completes its 'normal' curriculum early in the year (e.g. the end of June) and for the rest of the year students are placed into different groups for a special project and you ran the promotion process and accepted the default Reference Date, there would be a danger that the promotion would not find the student memberships to promote. Instead, editing the **Reference Date** to the day before these short-term groups came into effect would ensure that the original curriculum is promoted.

9. Click the **Next** button to display the **Select Groups** page.



The groups affected by the Academic Promotion are displayed for review. These will be the groups associated with the selected scheme in the tick grid on the **Group Memberships in Scheme** page.

10. Define the groups you wish to include as part of the Academic Promotion by selecting or deselecting their associated check boxes.

NOTE: It is not be possible to continue until at least one group has been selected.

It might be necessary to remove groups from the promotion process if, for example, you wish to reduce the number of Maths classes in the following year. This could be due to a shortage of teachers in the new academic year, resulting in a reduction in the number of classes that can be taken. This would mean that the students in the third Maths class would need to be evenly distributed to the two remaining classes (**10x/Ma1** and **10x/Ma2** in the previous graphic) to ensure they still get taught Maths this year. After the wizard has assigned students to **10x/Ma1** and **10x/Ma2**, you can assign those who were in **10x/Ma3** to either of the other two remaining groups manually, using the tick grid.

When the groups have been selected, the system can identify the students whose group memberships *next year* will be affected by the promotion process. These students appear as editable in the tick grid (i.e. they are listed with a white background) and were members of corresponding groups in the previous year, on the selected **Reference Date**.

11. Click the **Next** button to continue.

A warning is displayed if a student is known in the new academic year, but was unknown in the previous academic year. This might occur if, for example, a student joins your school at the start of the new academic year.

12. Click the **Yes** button to continue. The selected students will be included as part of the promotion process.

The number of students who were members of groups in the previous academic year, but do not appear in the tick grid for next year, is displayed.

*NOTE: Students who were members of a group in the previous academic year, but who are not eligible for the next year group or have been filtered out of the tick grid, cannot be promoted. A student who is displayed in the tick grid with a read-only row (yellow background) can be promoted only if you have clicked the **Relax** button. The number of students who could potentially be promoted, but have no membership of the appropriate group in the previous academic year, will also be displayed. This is very unlikely to happen, unless you have selected an inappropriate **Reference Date**, and no students have a membership on the selected date.*

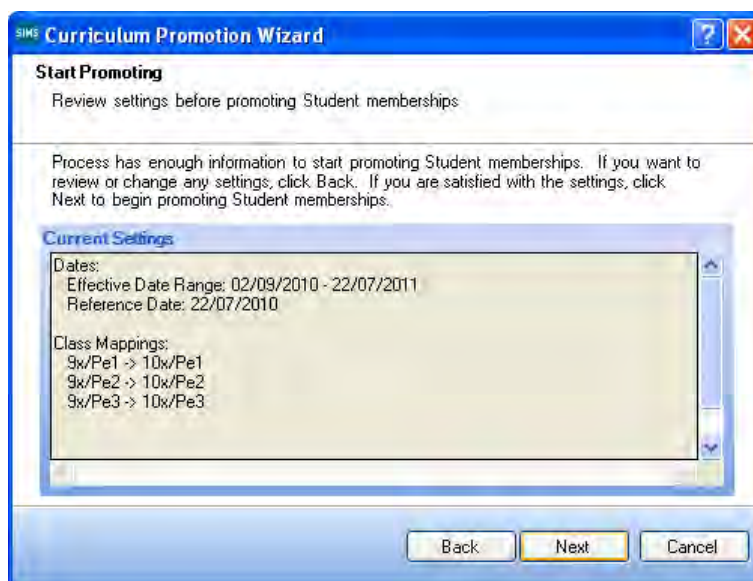
13. Click the **OK** button to continue. The number of students who could have been promoted, but were filtered out of the tick grid, is displayed.
14. Click the **OK** button to continue.

The number of students who, at the **Reference Date** in the previous academic year, were members of more than one group belonging to the scheme, is displayed. This is possible, although highly unusual. Such student memberships will not be promoted. If you want to assign such students to a group, you must do this manually.

15. Click the **OK** button to continue.

The number of students whose row in the tick grid was read-only on entering the **Curriculum Promotion** wizard is displayed. Their class memberships will not be promoted to the new academic year. To enable these class memberships to be promoted to the new academic year, you should close the wizard and relax the eligibility rules by clicking the **Relax** button. You can then run the wizard again and the students will not be displayed in this list.

16. Click the **OK** button to display the **Current Settings** page.



This page displays a summary of the information that will be used when promoting academic data to the next academic year and is based on the options previously selected in the wizard. This information includes:

- the **Effective Date Range** (over which the new memberships will be created)
- the **Reference Date** (on which previous memberships will be read)
- the mapping of groups from the previous year to the groups of the *next year* scheme that you have selected for promotion and the names of students who could not be promoted for various reasons (detailed previously).

17. Click the **Next** button to continue.

Promoted memberships are displayed on the tick grid, but are not yet saved to the database. The changes can still be rejected by clicking the **Undo** button once the wizard has been closed.

Once the Academic Promotion process has been completed successfully, the final page of the wizard is displayed and informs you that the process has been completed.

18. Click the **Finish** button to close the wizard and return to the tick grid.

Those student group memberships that could not be promoted (i.e. because of their status on the tick grid, or not having a membership on the **Reference Date**, etc.) are tagged automatically.

To display all tagged students at the top of the tick grid, right-click anywhere on the tick grid and select **Sort by | Tagged** from the pop-up menu. This enables the subsequent manual assignment of students to their new classes.

19. Click the **Save** button to save the changes of the Academic Promotion process.

Only after clicking the **Save** button, are the changes made by Academic Promotion saved to the database.

Exporting and Importing Student Group Memberships

The export and import of student memberships function can be used extensively at year end to allocate students to classes. For full instructions, please refer to the *Importing and Exporting Student Group Memberships* chapter in the *Academic Management in SIMS* handbook.

NOTE: When you have finished assigning students to their classes, select **Tools | Academic Management | Course Manager | Update Course Memberships**). This routine should always be run when any changes to class memberships are made.

Allocating Applicants to Registration Groups/Classes

Before allocating applicants to registration groups, you must have:

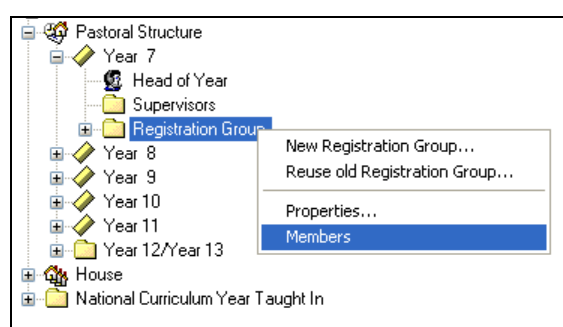
- added the applicants via **Focus | Admission | Application**, or imported via ATF or CTF. For more information, please refer to the appropriate SIMS Admissions Code of Practice handbook.
- given each applicant an application status of **Offered** or **Accepted**. For more information, please see *Change the Status of Applications to Offered or Accepted*.

NOTE: Applicants who are to be allocated to curriculum classes must have an application status of **Accepted** before they can be assigned their timetable/to their curriculum classes. Schools that have applicants assigned to an admission group should ensure that the appropriate **Enrolment Status** is selected from the drop-down list on the applicant record.

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information.

2. Expand the **Pastoral Structure** until the **Registration Group** folder is visible under the required year.



3. Right-click the applicable **Registration Group** folder and select **Members** from the pop-up menu to display the **Allocate Students/Applicants** dialog.

The **Name**, **Gender**, current **Year Group** and current **Reg Group** is displayed for each applicant together with the total number of applicants allocated to each registration group (at the bottom of the grid).

SIMS Allocate Students/Applicants : Year 11

Effective Date Range
☒ From effective date to end of the academic year ()
☐ Over the whole academic year (01/09/2010 - 31/08/2011)

Student Status
☒ Students ☒ Accepted Applications ☒ Current Applications (Applied / Offered / Reserved)

Members Print Actions

Name	Gender	Year Group	Reg Group	11A	11B	11C	11D	11E	11F
Abbot, Clarissa	Female	Year 11	11A	✓					
Able, Benjamin	Male	Year 11	11A	✓					
Abu-Koash, Frederik	Male	Year 11	11C			✓			
Adair, Geoffrey	Male	Year 11	11B		✓				
Adams, Louise	Female	Year 11	11C			✓			
Addison, Avie	Female	Year 11	11D				✓		
Addison, Graham	Male	Year 11	11E					✓	
Agathocleous, George	Female	Year 11	11F						✓
Agathocleous, Sulvina	Female	Year 11	11F						✓
Ahmad, Arfa	Female	Year 11	11F						✓
Ahmed, Mohan	Male	Year 11	11F						✓
Total				29	28	27	28	27	28

OK Cancel

The **Student Status** section enables you to limit the applicants displayed in the grid, as follows:

- **Students** – select this check box to display any on-roll students who have been assigned to any registration group within the selected year. These students are displayed with a grey background.
- **Accepted Applications** – select this check box to display any applicants who have an application status of **Accepted** (i.e. they have accepted a place at your school). These applicants are displayed with a pink background.
- **Current Applications** – select this check box to display any applicants who have an application status of **Offered** (i.e. they have been offered a place at your school). These applicants are displayed with an orange background.

*NOTE: Although you can specify which registration group the applicants will go in, the applicants must be admitted (via **Routines | Admission | Admit Applications**) before they become a member of this registration group.*

Additional columns (**House, Ethnicity, Previous School, Admission no.** and **Date of Birth**) can also be displayed in the grid by selecting the appropriate option from the **Actions** drop-down menu.

Effective Date Range

☒ From effective date to end of the academic year (☐ Over the whole academic year (01/09/2010 - 31/08/2011)

Student Status

☒ Students ☒ Accepted Applications ☒ Current Applications (Applied / Offered / Reserved)

Members Print Actions

Name	Gender	Year Group	Reg Group	DOB	11A	11B	11C	11D	11E	11F
Abbot, Clarissa	Female	Year 11	11A	22/06/1995	✓					
Able, Benjamin	Male	Year 11	11A	19/02/1995	✓					
Abu-Koash, Frederik	Male	Year 11	11C	05/08/1995			✓			
Adair, Geoffrey	Male	Year 11	11B	22/09/1994		✓				
Adams, Louise	Female	Year 11	11C	01/10/1994			✓			
Addison, Avie	Female	Year 11	11D	03/03/1995				✓		
Addison, Graham	Male	Year 11	11E	17/09/1994					✓	
Agathocleous, George	Female	Year 11	11F	24/10/1994						✓
Agathocleous, Sulvina	Female	Year 11	11F	04/04/1995						✓
Ahmad, Arfa	Female	Year 11	11F	30/11/1994						✓
Ahmed, Mohan	Male	Year 11	11F	30/11/1994						✓
Total					29	28	27	28	27	28

OK Cancel

The previous graphic shows that **Date of Birth** has been added to the grid. It can also be useful to change the view to **View Triple**, which displays a breakdown of the totals for females and males in each group.

- Select the required registration group for each applicant in the grid by clicking the appropriate cell to display a tick. Clicking the cell again removes the tick.
- Once you have selected registration groups for each applicant, click the **OK** button to save the changes.

☐ **Completed**

Printing Class (Registration Group) Lists for the New Academic Year

Class (Registration Group) lists can be easily produced using any of the following pre-defined reports:

- Registration Groups (Dated)
- Registration Groups (Dated – DOB Sort)
- Registration Groups (Dated – Gender Sort)
- Registration Groups (Dated with Columns).

If these reports do not exist on your system, you will need to import the latest pre-defined reports as described in the *Reporting in SIMS* handbook.

- Select **Reports | Run Report** to display the **Report** browser.

- Expand the **Student** focus and double-click the required pre-defined report, e.g. **Registration Groups (Dated)** to display the **Enter parameter values for report** dialog.

- Deselect the **Bypass effective date** check box.
- Enter the required date, e.g. **01/09/2010** or click the **Calendar** button and select the required date.
- Select the required **Year Group(s)** and **Registration Group(s)** then click the **OK** button to produce the required report.

Registration Groups (Dated) Report

Registration Groups (Dated)

Registration Groups (Dated)
Year group is Year 8 and Reg group is 8A

Registration Group: 8A
Tutor: Miss J Foster
Room: English Room 4
Effective date: 01/09/2010

Name	Gender	Date of Birth
Abbey Jimmy	F	17-04-1998
Burns Paul	M	01-11-1997
Cronin Michael	M	02-03-1998
Edgeworth Rosemary	F	18-06-1998
Garcha Inderjeet	F	26-03-1998
Hawthorne Amanda	F	19-11-1997
Hawthorne Megan	F	19-11-1997
Hawthorne Rachel	F	19-11-1997
Houghton Howard	M	31-07-1998

Total: Males	16
Total: Females	10
Group Total:	26

Registration Group (Dated – DOB Sort)

As per the Registration Groups (Dated) report, but in Date of Birth order.

Registration Group (Dated – Gender Sort)

As per the Registration Groups (Dated DOB Sort) report but in Gender order.

Registration Group (Dated – With Columns)

As per the Registration Group (Dated) report but with five additional blank columns.

Registration Groups (Dated with Columns)

Registration Groups (Dated with Columns)
Year group is Year 8 and Reg group is 8A

Registration Group: 8A
Tutor: Miss J Foster
Room: English Room 4
Effective date: 01/09/2010

Name	Gender	Date of Birth	1	2	3	4	5
Abbey Jimmy	F	17-04-1998					
Burns Paul	M	01-11-1997					
Cronin Michael	M	02-03-1998					
Edgeworth Rosemary	F	18-06-1998					
Garcha Inderjeet	F	26-03-1998					
Hawthorne Amanda	F	19-11-1997					
Hawthorne Megan	F	19-11-1997					
Hawthorne Rachel	F	19-11-1997					
Houghton Howard	M	31-07-1998					

Total: males	16
Total: Females	10
Group Total:	26

☐ Completed

In SIMS Attendance - Print OMR Registration Sheets for the First Week of Term

1. Select **Routines | Attendance | OMR Entry | Print OMR Registration Sheets** to display the **Print OMR Registration Sheet** page.

Print OMR Registration Sheet

Search Print

From w/b 22/03/2010 to w/b 22/03/2010

Group Type: Reg Group

☐ Include accepted applicants

Short Name	Description
7A	7A
7B	7B
7C	7C
7D	7D
7E	7E
7F	7F
8A	8A
8B	8B
8C	8C

Select All Deselect All

2. Highlight the required group(s) using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required registration sheets.

☐ Completed

In SIMS Attendance - Entering Reasons for Absence Last Year (if Required)

If you are using OMR Absence sheets, read the sheets via **Routines | Attendance | OMR Entry | Read OMR Absence Sheets**.

If you are using Edit Marks (via **Focus | Attendance | Edit Marks**), put the date back in the **Week Beginning** field to the required date, then click the **Search** button.

Double-click the required registration group to display marks for the chosen group(s) then edit as required.

Edit Lesson Marks - W/b 22/03/2010 - 7A																																					
SaveUndoPrintCodesPreserveMinutes LateCommentsVerticalLinks HelpUnpinClose																																					
Previous WeekNext Week Select All☐ Show only students with Unexplained Absences today																																					
Name	Reg	Mon 22/03/2010							Tue 23/03/2010							Wed 24/03/2010							Thu 25/03/2010							Fri 26/03/2010							
		AM	1	2	3	4	PM	5	AM	1	2	3	4	PM	5	AM	1	2	3	4	PM	5	AM	1	2	3	4	PM	5	AM	1	2	3	4	PM	5	
Abbey, Jimmy	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Burns, Paul	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Cronin, Michael	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Edgeworth, Rosemary	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Garcha, Inderjeet	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Hawthorne, Amanda	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Hawthorne, Megan	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Hawthorne, Rachel	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Houghton, Howard	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Houghton, Raju	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Houghton, Storm	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Houghton, Suki	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Kamiya, Kaoru	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Lightfoot, Hassa	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Mills, Helena	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Ouchakov, Anton	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Prowse, Reggie	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Reeves, Vincent	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Richardson, Brian	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Singleton, Joseph	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Smith, Adam	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Stump, Shaun	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Verge, Neil	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Wellar, Ruthus	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
White, Mooreen	7A	L	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		
Yarwood, Michael	7A	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/	/		

☐ Completed

Applying the Timetable to the New Academic Year

IMPORTANT NOTE: *Lesson Monitor and Cover 7 will not work for the new academic year until this process has been completed successfully.*

The purpose of this routine is to take each day in the specified date range and map it to a day in the timetable cycle. For example, 6 October might be mapped to timetable day 1, 7 October mapped to timetable day 2, and so on.

It is recommended that you apply the timetable only as far in advance as you can be sure of the calendar, e.g. one term at a time.

Previous mappings can be overwritten. This may be necessary if mappings had previously been applied to the whole year, or if changes are required.

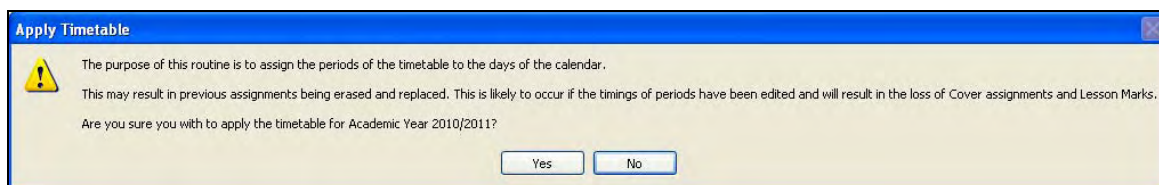
IMPORTANT NOTES:

Cover 7 will only be able to record cover arrangements as far in to the future as the timetable has been applied.

Remapping a day will result in the loss of any Cover arrangements made for that day together with any lesson marks.

It is important to note the following:

- If you have printed out OMR Registration sheets in lesson groups and have now changed the mappings, these sheets may no longer be useful, as the students listed may no longer meet on that date.
 - If you are using Lesson Monitor and have already used **Tools | Select Periods for Sessions** in preparation for printing registration sheets, then you must select the periods for sessions again after applying the new timetable.
1. Select **Tools | Academic Management | Apply Timetable**. A message dialog prompts for confirmation that you wish to proceed.



2. Click the **Yes** button to display the **Map calendar dates to timetable days** dialog.

Map calendar dates to timetable days

Period: Academic Year 2010/2011 Date Range: 01/09/2010 - 31/08/2011

Timetable Model: 25 Period A 01/09/2010 - 31/08/2011

Date Range: From 01/09/2010 To 31/08/2011

Method: ☒ Use default days ☐ Select start point

02/09/2010 maps to Timetable day: Thu

Apply

Date	Status	Timetable day
01/09/2010	Wed	None
02/09/2010	Thu	Full
03/09/2010	Fri	Full
04/09/2010	Sat	None
05/09/2010	Sun	None
06/09/2010	Mon	Full
07/09/2010	Tue	Full
08/09/2010	Wed	Full
09/09/2010	Thu	Full
10/09/2010	Fri	Full
11/09/2010	Sat	None
12/09/2010	Sun	None
13/09/2010	Mon	Full
14/09/2010	Tue	Full
15/09/2010	Wed	Full
16/09/2010	Thu	Full

Click on the 'Status' or 'Timetable day' column of a row to edit the status or timetable day.

OK Cancel Help

3. If more than one **Timetable Model** exists, select the required one from the drop-down list.
4. Specify the date range to which you wish to apply the timetable (e.g. dates of the next term) by entering dates in the **From** and **To** fields. Alternatively, click the **Calendar** buttons and select the dates from the calendars.

NOTE: The date range must be within the dates of the timetable model.

5. Two methods are available for mapping calendar dates to timetable days. Select either the **Use default days** or **Select start point** radio button.
 - **Use default days** - This method always maps a calendar Monday to timetable Monday, a calendar Tuesday to timetable Tuesday, etc.

*NOTE: If a ten day timetable cycle is in use, after selecting the **Use default days** radio button you must select a starting timetable day. For example, whether to map 02/09/2010 to Thursday1 or Thursday2.*

- **Select start point** - If you select this method, dates when the school is open are mapped to timetable days regardless of the day of the week. For example, if Friday 7 December is timetable day 5 and Monday 10 December is a staff training day, then Tuesday 11 December is mapped to timetable day 6. It is possible however, to avoid this situation by applying the timetable to each term separately (using **From** and **To** dates).

Within the specified date range, the system identifies the first date that does not have a status of **None** and is displayed in the bottom left-hand corner of the dialog. In the following graphic, the date selected from the drop-down list is shown as **02/09/2010 maps to Timetable day**.

Date	Status	Timetable day
01/09/2010	Wed	None
02/09/2010	Thu	Full
03/09/2010	Fri	Full
04/09/2010	Sat	None
05/09/2010	Sun	None
06/09/2010	Mon	Full
07/09/2010	Tue	Full
08/09/2010	Wed	Full
09/09/2010	Thu	Full
10/09/2010	Fri	Full
11/09/2010	Sat	None
12/09/2010	Sun	None
13/09/2010	Mon	Full
14/09/2010	Tue	Full
15/09/2010	Wed	Full
16/09/2010	Thu	Full

Click on the 'Status' or 'Timetable day' column of a row to edit the status or timetable day.

6. Select the timetable day that you wish this date to start on from the **dd/mm/yyyy maps to Timetable days** drop-down list.
7. Click the **Apply** button to validate your selections and apply the mapping. The resulting mapping is displayed in the **Timetable day** column, as shown in the following graphic.

Date	Status	Timetable day
01/09/2010	Wed	None
02/09/2010	Thu	Full
03/09/2010	Fri	Full
04/09/2010	Sat	None
05/09/2010	Sun	None
06/09/2010	Mon	Full
07/09/2010	Tue	Full
08/09/2010	Wed	Full
09/09/2010	Thu	Full
10/09/2010	Fri	Full
11/09/2010	Sat	None
12/09/2010	Sun	None
13/09/2010	Mon	Full
14/09/2010	Tue	Full
15/09/2010	Wed	Full
16/09/2010	Thu	Full

8. Click on the **Save** button to save the data and apply the timetable.

Other SIMS Module Processes

Assessment Housekeeping

It is recommended that the following tasks are carried out during the Summer holidays or in the first week of each new term.

- Delete unused aspects
- Delete marksheets for old registration groups
- Set up new marksheets for new groups for the new academic year.

EMA End of Year Processes

This section applies only to schools using EMA.

Performing the following steps will help you to prepare for the next EMA academic year.

1. From **Tools | Setups | EMA Setups**, set up a new EMA year with its associated study patterns.
2. In the **Years/Study Patterns** panel, click the **New** button to display the **Add EMA Year** dialog.

Code	Description
Ind	Individual
TmDt	Term Dates
TmDtSP	Term Dates to Study Period end

3. Enter a **Label** for the new year, e.g. **EMA AY 10/11**.
4. Enter the **Start Date** and **End Date**
This date range should represent the period during which you might make EMA payments to students. This is likely to be the period representing your academic year. Therefore, the **Start Date** should be set to the first day of term of the academic year on which students are present.
5. **Study Dates** for the new EMA year must be defined for two of the pre-defined **Study Patterns**, i.e. **Term Dates** and **Term Dates to Study Period end**.
Highlight **Term Dates** and click the **Open** button to display the **Add EMA Study Pattern** dialog.
6. Click the **New** button to display the **Add EMA Study Pattern** dialog.

Start Date	End Date
01/09/2010	17/12/2010
04/01/2011	08/04/2011

7. Enter a **Start Date** and **End Date** for the study pattern and click the **OK** button on each dialog, until the **Add EMA Year** dialog is displayed.
8. Define dates for the **Term Dates to Study Period end** Study Pattern using the same method.
9. Click **OK** at each dialog to return to the **EMA Setup** page.
10. Click the **Save** button to save your settings.

The Assessment and Payment Body (APB) now allow automatic transfer of enrolment and payment files from the SIMS EMA system.

If your school switches from using SIMS Attendance to SIMS Lesson Monitor, you can switch the attendance source on the **EMA Setup** page (via **Tools | Setups | EMA Setups**).

Therefore, for any current Year 11 students who are starting EMA in Year 12 this September, select **Routines | EMA | Student EMA Details** to set up an EMA record and an entitlement for the 2010/2011 EMA year. If you are still working in the 2009/2010 academic year, alter the default filter **Year Group** to include year 11 students. Make sure you choose the 2010/2011 entitlement record.

Remember, you can send enrolment records via the automated transfer at any time you are sure the student is coming back to your school and will be on roll in September 2010. The system will also know if you update any of the details of an EMA student and include these changes when it next exports the student to the APB. For example, if you change any period of entitlement (e.g. for a student doing fieldwork during a holiday period), or you change the course type on which the student is enrolled.

For existing EMA students who are staying for a further year in your school and have applied for a new EMA Year, set up a new entitlement for the 2010/2011 EMA Year. This will then be sent with your next enrolment export to the APB.

Curriculum and Lesson Planner

This section applies only to SIMS Curriculum and Lesson Planner users.

This section provides a brief description of the activities that should be considered in readiness for the next academic year. For full instructions on how to carry out each task, please refer to the *Curriculum and Lesson Planner handbook* which is available from the **Documentation Centre** (accessed by clicking the **Documentation** button on the **SIMS Home Page**).

- **Copy School Plans** - After the new academic year has been created, copy the existing School Plan and save it with a new name (e.g. Main Plan 2010-2011) via **Focus | School | Curriculum & Lesson Planner | School Plans**.
- **Check Cohorts** - Check that the number of Cohorts per year group is the same as last year – make adjustments as necessary via **Tools | Curriculum & Lesson Planner | Planning Cohorts**.
- **Review Teaching Plans** - Departments can review their teaching plans and make changes as necessary.
- As new academic classes are developed (in Nova), make sure they are assigned to the new School Plan:
 - Select **Focus | School | Curriculum & Lesson Planner | School Plans** then select the required plan.
 - Hover over the grey, left-hand cells to see the classes linked to courses.
 - Double-click the left-hand grey cells to gain edit control and select the correct classes.
- After the SIMS roll-over date, change the status of the old plan to **Draft** and the new plan to **Actual** status via **Focus | School | Curriculum & Lesson Planner | School Plans**.

SIMS Partnership Xchange

This section applies only to Partnership Xchange Users

Partnership Xchange users need to set up their partnership links for the next academic year. This is achieved by adding a new Partnership Instance for the new academic year linked to the same zone as their current active Partnership Instance. A school can only have one active Partnership Instance per academic year.

For instructions on creating the Partnership Instance, please refer to the *Joining/Managing a Partnership* chapter in the *Partnership Xchange for School Administrators* handbook.

After the New Academic Year has Started

The following routines should be undertaken once the new academic year has been started.

- In SIMS, admit applicants – see page 70.
- In SIMS, record any re-admission students – see page 72.
- In Attendance, print the official register for July – see page 73.

Admitting Applicants

Applicants should be admitted on the first day that you expect them to attend at your school and not, when they actually arrive at the school. If however, you have been contacted by a parent who explains why their child will not be able to start on the specified date, you can agree a new start date for that applicant.

*NOTE: Guest students will be admitted and a student record created. They will not have an admission number (because they are a guest) and therefore, will not appear on-roll. They can be selected in the Student browser by selecting **Guest** from the **Status** drop-down list.*

For more detailed instructions, please refer to appropriate SIMS Admissions Code of Practice handbook.

1. Select **Routines | Admission | Admit Applications** to display the **Find Intake Group** browser.

Name	Admission Year	Admission Season	Year Group	Planned Admission	Status
2005 - Autumn - 7	2005/2006	Autumn	Year 7	160	Active
2009/2010 - Autumn Year 7	2009/2010	Autumn	Year 7	250	Active
2009/2010 - Autumn Year 8	2009/2010	Autumn	Year 8	10	Active
2010/2011 - Autumn Year 7	2010/2011	Autumn	Year 7	250	Active

2. Search for and then double-click the required intake group to display the **Admit Applicant Detail** page.

The **Summary** panel displays read-only statistics about the selected intake group as shown in the following graphic.

Summary	
Total Applicants	7
Accepted	5
Planned Admission	3
Withdrawn	1
Applied	0
Rejected	0
Offered	0
Admitted	1

Total Applicants	The number of applicants who have applied for a place in this intake group.
Planned Admission	The original number of new applicants intended for this intake group.
Applied	The number of applicants who have applied for places in this intake group.
Offered	The number of applicants offered places in this intake group.
Accepted	The number of applicants who have accepted places in this intake group.
Withdrawn	The number of applicants who have withdrawn their application.
Rejected	The number of rejected applications in this intake group (Independent schools only).

The **Applications** panel displays by default, all applicants with an application status of **Accepted**. The display includes the **Name**, **Gender**, **Date of Birth**, proposed **Date of Admission**, **Enrolment Status**, **Application Status**, **UPN** and whether a UPN will be assigned. A tick grid is provided enabling the application status to be amended as required. The order of the display can be changed by clicking on any column heading.

2 Applications

Application Status: Accepted Assign Permanent UPN Admit All

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
► Caldwell Ley	Female	04/01/2005	01/09/2010	Single Registration	Accepted	D820200103009	No Change		
Dahl Sandra	Female	12/10/2004	01/09/2010	Single Registration	Accepted	T820200103012	No Change		
Gambioni Peter	Male	31/03/2005	01/09/2010	Single Registration	Accepted	C820200199045	No Change		
JACKS, Gary	Male	23/07/2005	01/09/2010	Single Registration	Accepted	X820200195026	No Change		
Magnus Olga	Female	19/12/2004	01/09/2010	Single Registration	Accepted	Q820200104029	No Change		
Taghavi Jilina	Female	13/12/2004	01/09/2010	Single Registration	Accepted	Y820200197021	No Change		
VEKANYA Nita	Female	16/04/2005	01/09/2010	Single Registration	Accepted	M820200196021	No Change		
Zabidi, Julie	Female	01/01/2005	01/09/2010	Single Registration	Accepted		No Change		

- If you wish to admit applicants with a different application status, such as **Offered**, select it from the **Application Status** drop-down list then follow the remainder of this process.
- If you need to add UPNs, click the **Assign Permanent UPN** button. The **Assign UPN** column is then be populated with **Assign Permanent UPN**, as shown in the following graphic.

2 Applications

Application Status: Accepted Assign Permanent UPN Admit All

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
► Chengahonwe-Somoo, Syn...	Female	05/06/1998	01/09/2010	Single Registration	Accepted		Assign Permanent...		
Jackson, Freya	Female	30/07/1998	01/09/2010	Single Registration	Accepted		Assign Permanent...		
Smith, Geoff	Male	30/06/1998	01/09/2010	Single Registration	Accepted		Assign Perman...		

- To edit individual applicants, select the required value from the drop-down list in the **Assign UPN** column, e.g. **No Change** (if the applicant already has a UPN) or **Assign Temporary UPN** as shown in the following graphic.

2 Applications

Application Status: Accepted Assign Permanent UPN Admit All

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
► Chengahonwe-Somoo, Syn...	Female	05/06/1998	01/09/2010	Single Registration	Accepted		Assign Permanent...		
Jackson, Freya	Female	30/07/1998	01/09/2010	Single Registration	Accepted		No Change		
Smith, Geoff	Male	30/06/1998	01/09/2010	Single Registration	Accepted		Assign Tempor...		
							No Change		
							Assign Permanent UPN		
							Assign Temporary UPN		

- Permanent UPNs** are issued to new applicants only when it is believed that they have never previously been allocated a UPN, or to replace a temporary UPN.
- Temporary UPNs** are issued to an applicant only when a school does not know their permanent UPN (e.g. awaiting transfer file/applicant's information).

IMPORTANT NOTE: UPN information is required for School Census. This is the only opportunity to bulk allocate UPNs. If you do not generate them here, you need to allocate UPNs on an individual basis via the **Student Details** page. Any known existing UPNs can be entered in the **Basic Details** panel either via **Focus | Admissions | Applicant**.

- If you intend to admit all the applicants in the selected intake group, click the **Admit All** button. Alternatively, click in the **Admitted** column adjacent to each applicant you wish to admit. The most effective method is to click the **Admit All** button and edit any exceptions.

Name	Gender	Date Of Birth	Date Of Admission	Enrollment Status	Application Status	UPN	Assign UPN	Admitted	Withdrawal
Chengahorwe-Somoo, Syn...	Female	05/06/1998	01/09/2010	Single Registration	Accepted		Assign Permanent...	☐	☒
Jackson, Freya	Female	30/07/1998	01/09/2010	Single Registration	Accepted		Assign Permanent...	☒	☐
Smith, Geoff	Male	30/06/1998	01/09/2010	Single Registration	Accepted		Assign Perman...	☒	☐

- Once complete, click the **Save** button to admit the applicants. The **Application** panel refreshes its display and shows only those applicants with an application status matching that selected in the **Application Status** drop-down list. In most cases, the list is empty.

☐ **Completed**

Re-Admitting Students

This section contains a summary of the required steps. For more information, please refer to the appropriate SIMS Admissions Code of Practice handbook.

Any students who have left your school and then subsequently return, must be re-admitted rather than added to the system again. This ensures that the student's educational **History** is maintained.

IMPORTANT NOTES:

- It is essential that you follow this process for re-admissions (i.e. for students who have left your school and subsequently return). Do not remove the **Date of Leaving** as a method of re-admitting. However, if the student was originally leaving and changes their mind, i.e. they do not actually leave, then you should remove their **Date of Leaving**.
- It is perfectly acceptable for there to be a gap between the date of leaving and the date of return and this will be reflected in SIMS if it is the case (for example, if the student leaves in July but returns in September). If you do not want any gaps in the associated registration group memberships, then you will need to edit the history via **Focus | Student | Student Details** page by clicking the **History** button on the **Registration** panel.

- Select **Focus | Focus | Student | Student Details** to display the **Student Details** page.
- Click the **New** button to display the **Basic Details** panel. Enter the required **Surname** then click the **Continue** button. A list of **Matched People** matching the search criteria entered is displayed.
- Highlight the required student and click on the **Open** button to display a warning message The selected student is a Leaver, do you want to re-admit the Student?
- If you are certain that this is the student who should be re-admitted, click the **Yes** button to display the student's details.
- Add/edit further details as required, then click the **Save** button. All mandatory fields are highlighted in red and must be completed before the student's details can be saved.
- Click the **Save** button again if any additional data has been added.

☐ **Completed**

In SIMS Attendance - Printing the Official Register for July

Before printing the official register for July, you should deal with missing marks and add reasons for absence for the month you are going to print.

1. Select **Reports | Attendance | Whole Group Student Reports | Official Register** to display the **Official Register Report** page form.

2. Highlight the required group(s), using **Ctrl** or **Shift** to highlight multiple groups. Click the **Print** button to produce the required reports.

☐ **Completed**

Setting up a Pattern of Registration and Periods

This section applies only to Lesson Monitor users.

If you use Lesson Monitor, you will need to set up a new pattern of registration against periods at the beginning of the academic year, so that the new pattern is aligned with the current timetable. It is possible to associate a pattern with a timetable in the future, not just the current timetable, if required.

The current timetable structure, plus current AM and PM registrations, are displayed in the form of a grid. In some schools, PM registration takes place after the last period of the school day.

Any changes to the timetable will require the setup routine to be edited, e.g. if an extra period is included in the timetable or if a period is taken out. The start of a new academic year is an example of when this may occur.

When students have less than a full timetable, it is possible that they will not attend lessons that have been designated for registration. If this is the case, lesson marks for a student's earliest timetabled period can be counted as registration marks.

1. Select **Tools | Setups | Lesson Monitor Options | Lesson Monitor Setup** to display the **Lesson Monitor Setup** page.
2. In the **Registration and Periods Pattern** panel, select the required option from the **Timetable Models** drop-down list. The current (and any future) timetable models that have been applied to SIMS are available for selection. The selected timetable model (either one week or two weeks) is displayed in the grid.

3. Highlight the cells that belong to the AM session then click the **AM** button. A block of cells can be selected by clicking the cell located at the top left-hand side then, while holding down the **Shift** key, click the cell located at the bottom right-hand side. The selected AM cells are coloured pink.
4. Highlight the cells that belong to the PM session then click the **PM** button. The selected PM cells are coloured yellow.
5. To indicate the period when registration takes place each day, enter **A** (AM registration) and **P** (PM registration) in the appropriate cells.
 If registration takes place before a period, enter **A** or **P** in that period.
 If PM registration takes place after the last period, enter **N** in the last period.
6. Click the **Save** button. The registration and period pattern is saved for the date range of the selected timetable model.

1 Registration and Periods Pattern

Timetable Models
25 Period A 01/09/2010

	1	2	3	4	5
Mon	A				P
Tue	A				P
Wed	A				P
Thu	A				P
Fri	A				P

AM PM

Highlight the cells that belong to the AM session, then click the AM button. Repeat for the PM session. You can select a block of cells by clicking in the top left cell, then Shift-clicking in the bottom right cell.

Type A in the cells to show where AM registration occurs each day and type P to show where PM registration occurs. If you hold registration before or during a period then type A or P in that period. If you hold PM registration after last period then type N into last period.

☐ Completed

SIMS Learning Gateway

This section applies only to SIMS Learning Gateway users.

1. Create and distribute SIMS Learning Gateway accounts for new staff, students and parents.
2. Remove access to SIMS Learning Gateway from leavers, the parents of leavers (where they have no other children at the school) and staff who have left.

For full instructions, please refer to the *Removing Provisioned Users* chapter in the *SIMS Active Directory Provisioning Service* handbook.

Running Housekeeping Routines in SIMS

Now is a good time to carry out some general housekeeping routines in SIMS. For more information, please refer to the *Housekeeping Routines* chapter in the *Setting Up and Administering SIMS* handbook.