



THE BUSINESS OF EDUCATION

Reporting Quick Guide

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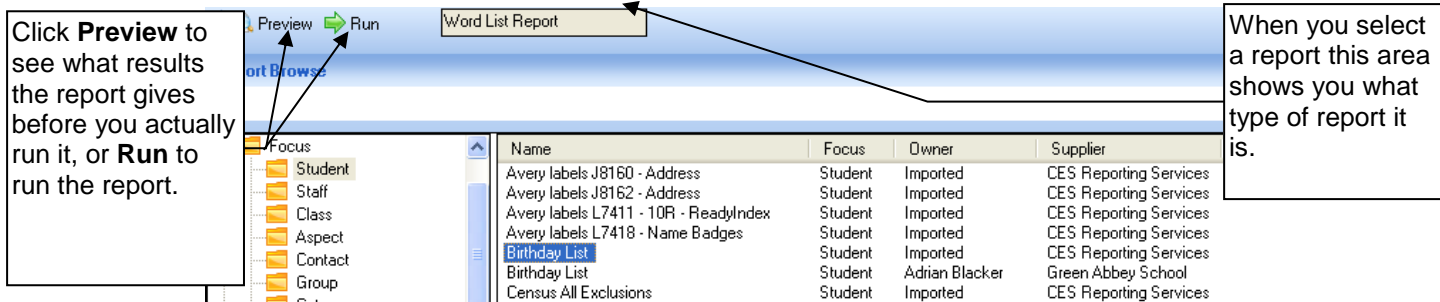
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CONTENTS

How to run a report	1
Previewing a report	2
Deleting a report.....	3
Adding a report to Favourites	3
Downloading and importing new reports	3
Exporting a report.....	4
Running a report for a specific pupil.....	5
Running a class list for a future date	5
Matching a name on a cheque to a pupil	5
Amending an existing report to include mailing point	6
How to check if the mailing point has been set	8
A report showing the breakdown of ethnicity, gender, FSM & PP & Ever 6	8
A report to check where there are missing, postcodes, UPNs & ethnicity	9
Changing the output of a report?.....	10

How to run a report


1. Choose **Reports > Run Report** or click  on the Focus Bar to open the **Report Browse**. Click on the + sign next to the **Focus** folder to see all the different focuses. Select a folder e.g. **Student, Group** to display the reports available for that focus.

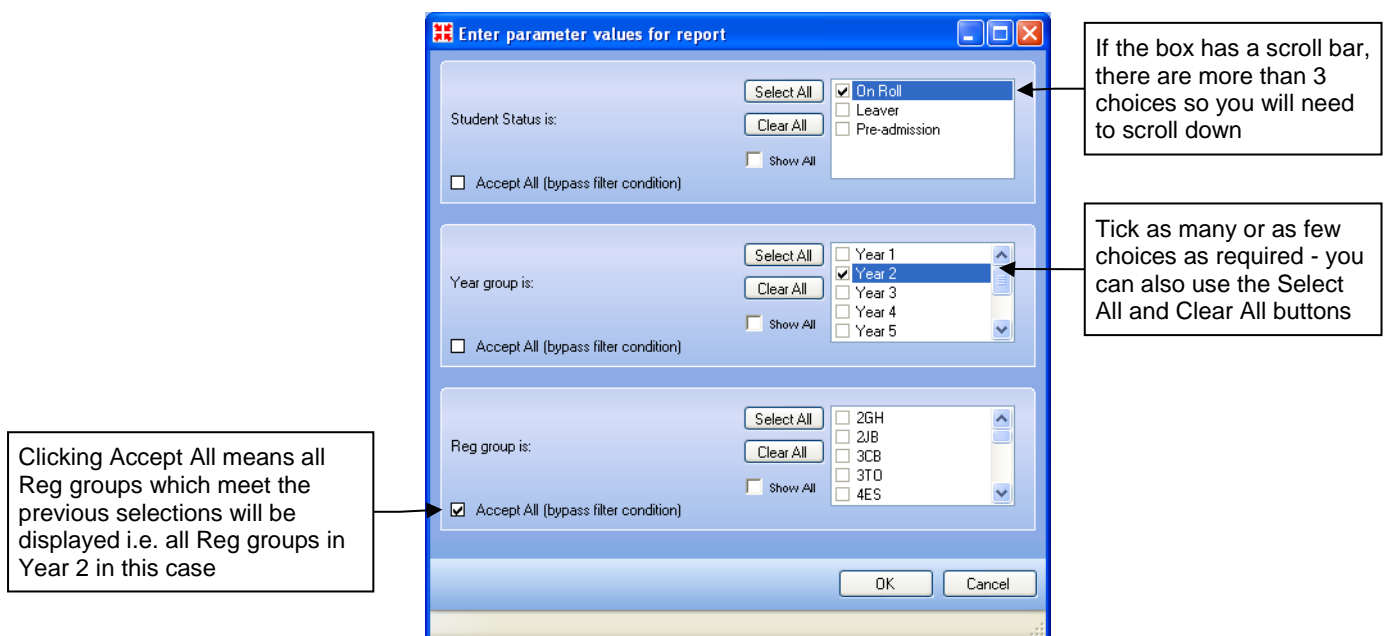


Click **Preview** to see what results the report gives before you actually run it, or **Run** to run the report.

When you select a report this area shows you what type of report it is.

Name	Focus	Owner	Supplier
Avery labels J8160 - Address	Student	Imported	CES Reporting Services
Avery labels J8162 - Address	Student	Imported	CES Reporting Services
Avery labels L7411 - 10R - ReadyIndex	Student	Imported	CES Reporting Services
Avery labels L7418 - Name Badges	Student	Imported	CES Reporting Services
Birthday List	Student	Imported	CES Reporting Services
Birthday List	Student	Adrian Blacker	Green Abbey School
Census All Exclusions	Student	Imported	CES Reporting Services


2. Select the report and click the **Run** button  on the focus bar or **double click on the report name** to generate the report.
3. Most reports either go to **Word** or **Excel**. Many require parameters to be filled in each time they are run. When you have made your selections, click **OK**.



If the box has a scroll bar, there are more than 3 choices so you will need to scroll down


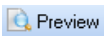
Tick as many or as few choices as required - you can also use the Select All and Clear All buttons

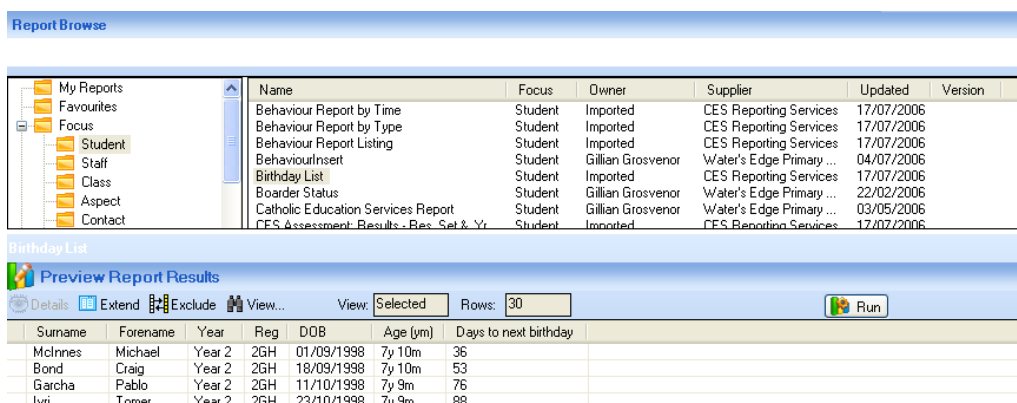
Clicking Accept All means all Reg groups which meet the previous selections will be displayed i.e. all Reg groups in Year 2 in this case

4. If reports are not opening correctly in Word or Excel, you may need to check your macro security levels in these programs. To do this select **File** then **Options** in Excel or Word 2010 or the **Office** button  and **Excel Options** or **Word Options** (in Excel and Word 2007). Then select **Trust Centre > Trust Centre Settings > Macro Settings** and ensure that **Disable with Notification** is selected. When you run some reports you will be prompted to **Enable** macros.
5. Once you have run the report to either **Word** or **Excel** you can edit and save the results as a document or spreadsheet as you would with any other Microsoft file.
6. It is important to always close Word or Excel before trying to run another report.

Previewing a report

If you need to run a report for specific pupils, use the **Preview** facility. Previewing allows you to add and remove pupils from the current selection. The changes you make are not saved in any way: if you wish to run reports regularly for a selection of pupils, you should do this with a user defined group.

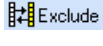
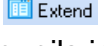

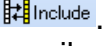
1. Go to **Reports > Run Report** or click  on the Focus Bar and highlight the report you need.
2. Click on **Preview** . If the report needs parameters, make the required selections and click **OK**.




The screenshot shows two windows. The top window is 'Report Browse' with a tree view on the left and a list of reports on the right. The bottom window is 'Preview Report Results' with a toolbar and a table of pupil data.

Name	Focus	Owner	Supplier	Updated	Version
Behaviour Report by Time	Student	Imported	CES Reporting Services	17/07/2006	
Behaviour Report by Type	Student	Imported	CES Reporting Services	17/07/2006	
Behaviour Report Listing	Student	Imported	CES Reporting Services	17/07/2006	
BehaviourInsert	Student	Gillian Grosvenor	Water's Edge Primary ...	04/07/2006	
BirthDay List	Student	Imported	CES Reporting Services	17/07/2006	
Boarder Status	Student	Gillian Grosvenor	Water's Edge Primary ...	22/02/2006	
Catholic Education Services Report	Student	Gillian Grosvenor	Water's Edge Primary ...	03/05/2006	
CES Assessment Results - Res. Set & Yr	Student	Imported	CES Reporting Services	17/07/2006	



Surname	Forename	Year	Reg	DOB	Age (ym)	Days to next birthday
McInnes	Michael	Year 2	2GH	01/09/1998	7y 10m	36
Bond	Craig	Year 2	2GH	18/09/1998	7y 10m	53
Garcha	Pablo	Year 2	2GH	11/10/1998	7y 9m	76
Ivri	Tomer	Year 2	2GH	23/10/1998	7y 9m	88


3. The sort order can be changed by clicking on the column headings. This will be reflected in the final output.
4. Highlight a pupil and click **Exclude**  to remove them from the selection. They are then marked with an **R**.
5. The Extend button  will add in all the other possible records for the report; in this case all the pupils in the school. They are marked with an **X**. Change the view to **Excluded** using the **View**  button, highlight the pupils that you wish to include then click **Include** . Now change the view to **Selected** to see your selection of pupils. The pupils you have added to your list are marked with an **&**.
6. When you change the view to **All** you can change whether a pupil is included in the selection or not by selecting the pupil and then clicking **Toggle**.
7. Rows which appear in white are included in the report while those shaded in grey are not. The symbols shown in the first column indicate the following:

No symbol	original report selection record
&	record added to the original selection
R	record removed from the original selection
X	record not included in the original selection and not required (excluded)

8. When your selection is complete, click **Run**  in the **Preview Report Results** window, NOT the usual one at the top of the screen.

Deleting a report

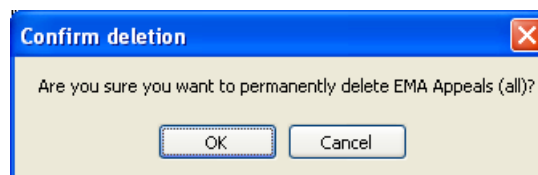
1. Choose **Reports > Design Report** or click  on the **Focus Bar** and click either the **Open** button  or the **Open an existing report** hyperlink.

2. 

3. In the **Open report** box, find the report you wish to delete and right-click on its name.



4. Select **Delete** from the menu.
5. A **Confirm deletion** box will be displayed: click **OK** to continue with the deletion.



You can delete any imported reports and reports that you have created, but not those created by other users in your school. If you do not get the option to delete any report, then you may not have the required access rights to delete reports.

Adding a report to Favourites

1. You can add a shortcut to a report in the **Favourites** folder making it easier to find and run reports that you use frequently.
2. Locate the report in the **Report Browse** that you wish to add to Favourites, right click and choose Add to Favourites.

Downloading and importing new reports

Reports created by HfL can be downloaded and imported into Sims from the following address:

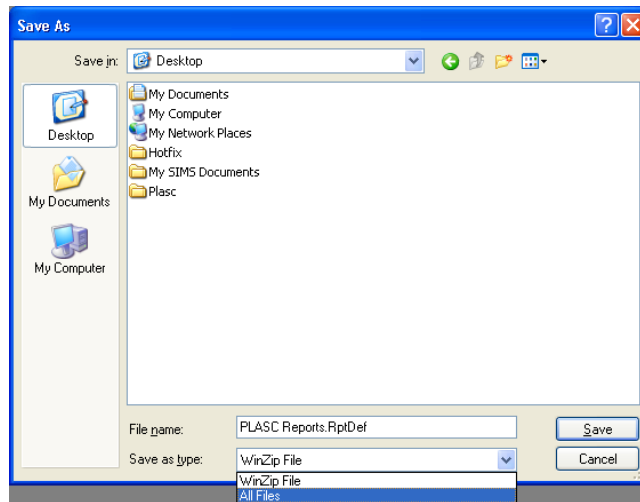
<http://bit.ly/hertsreports>

or

<http://www.thegrid.org.uk/info/traded/sitss/data/reporting/>


New reports are made available regularly.


1. To download a report file right click on the file and choose **Save Target As** from the menu.
2. Choose where you wish to save the file. Creating a folder for downloaded reports is a good idea.
3. Ensure that the **Save as type** box is set to **All Files NOT WinZip File or Compressed File**. You do not need to change the **File name** but ensure that the file extension is showing as **.RptDef** (type this in after the file name if necessary). Report files should all have the extension **.RptDef**.



4. Once you have set the location and the **Save as type**, click **Save**.
5. In **Sims**, go to **Reports > Import**.
6. Click the **Open** button and locate the report file from the **Look in box**.
7. Select the **Reports** file and click **Open**. The **Import report(s)** box is displayed.
8. A list of the reports included in the file will be shown. If necessary, you can change which reports to import by adding or removing the ticks. Click the **Import** button to import these reports. Click **Close** once the status changes to **Imported**.
9. The imported report(s) will now appear in the appropriate Focus. Our reports usually have a prefix of HfL or SITSS and also a Supplier name of HfL or SITSS.


Exporting a report

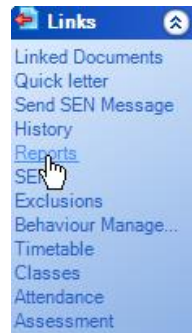
1. Go to **Reports > Export**.
2. Highlight the report or reports you wish to export – you can select more than one report by holding down the **Ctrl** key as you click on them.
3. Once the report or reports are selected, click **OK**. The **Export report(s)** box is displayed. Click the **Open** button  to choose a location for the exported file. The name of the file will default to the name of the first report – you can

change this name if you wish (it doesn't change the names of the actual reports in the file). Click **Save**, and then click **Export**  to create the file.

If you have created your own reports, we recommend exporting them so that if a report is accidentally deleted or becomes corrupted you can import it back again.

Running a report for a specific pupil

1. Choose **Focus > Pupil > Pupil Details** or click the **Pupil Details** button  on the Focus Bar.
2. Search and view the pupil details for the required pupil.
3. Click on the hyperlink to **Reports** from the **Links panel** to open the **Reports Browser**.



4. Select the report you need from the **Student Focus**. There will only be this focus available via this route.
5. Click **Run** or double click on the report name.

Running a class list for a future date

If you need a class list for a date in the future, you will need to download and import the report file for class lists from the SITSS website at:


<http://bit.ly/hertsreports> or

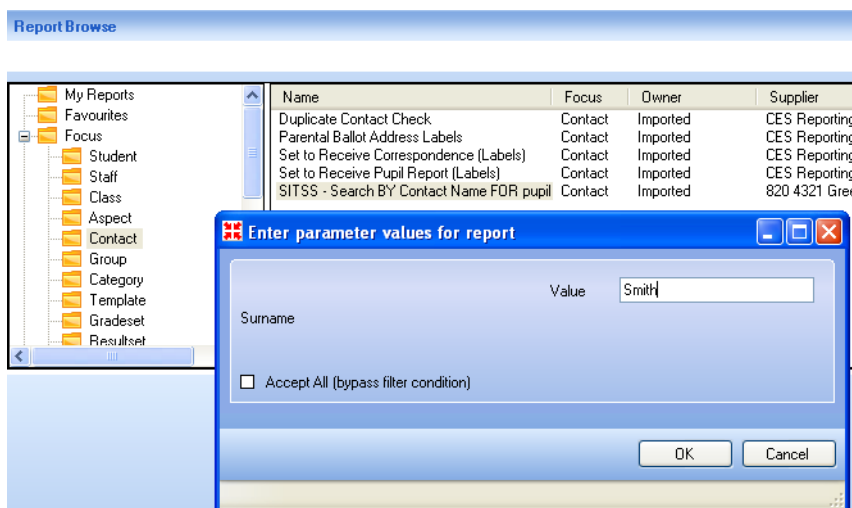
<http://www.thegrid.org.uk/info/traded/sitss/data/reporting/#documents>

Once imported, you will find most of these reports in the **Group** focus. There are also two Excel reports in the **Student** focus.

Matching a name on a cheque to a pupil

Sometimes you may receive into the school office a cheque that you can't match to a pupil. The report **SITSS – Search by contact name for pupil** will help you quickly find the pupil.

1. Choose **Reports > Run Report** or click the **Run Reports** button  on the **Focus Bar**.
2. In the **Report Browse**, double click on **SITSS – Search by contact name for pupil** (found in the Contact Focus).




3. Type in the contact name from the cheque into the **Value** box, click **OK**.
4. The report opens in Word.

Find Student by Contacts Surname

Contact forename	Contact Surname	Name	Reg
ANDY	SMITH	Garry Smith	
		Charlotte Smith	
		Callum Smith	3CB
		Sofia Philips	2JB
Chloe	Smith	Erica Smith	OAK
Jessica	Smith	Tony Smith	ASH
Jessica	Smith	James Smith	2JB
JUDITH	SMITH	Anna Fischer	2GH

Amending an existing report to include mailing point

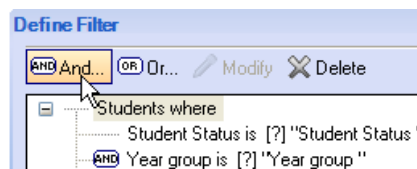
You can adapt any report to include a filter for mailing point so that the report will only display those with the mailing point set. First you **MUST** ensure that the mailing point is set correctly for either **Oldest** or **Youngest Child**. There is a Housekeeping routine for this under **Tools > Housekeeping**. Mailing point is shown in the **Family/Home** panel on a pupil record.

1. Choose **Reports > Design Report** from the menu or click  on the Focus Bar, then click the **Open an existing report** hyperlink.
2. In the **Open** report box, select the report you wish to amend and click **OK**. The screenshots show a particular label report, but you can choose any existing report.
3. The report will now be opened in **Design View**. In the **Report Summary** area at the bottom left of the design screen click on the hyperlink that reads **Filter**

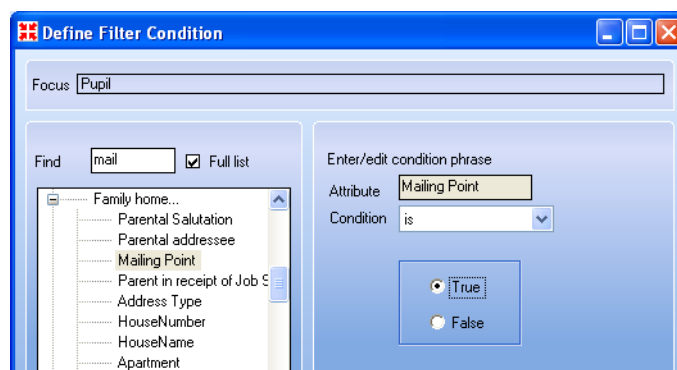
Students (if the report you have chosen is not in the Student focus, this hyperlink will read according to the chosen focus).



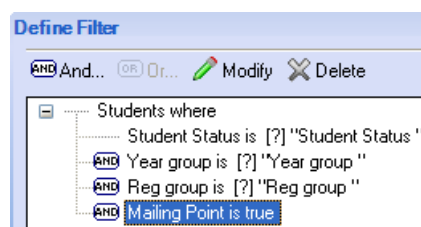
- The right hand side of the screen will now show any existing filters already set up.



- Click the **And** button to add a new filter. Type **mail** in the **Find** box to select Mailing Point and choose **True** as the option on the right of the screen.



- Click **OK** to add the filter.



- If the report is an existing predefined report or one that you have not made yourself, you will not be able to **Save** over the same report but must choose **Save As** to make a copy. If you have created the report yourself, you can **Save** over it, but you may wish to choose **Save As** in order to create a copy.
- Enter a name for the report then click **OK** and close the **Report Design** screen.

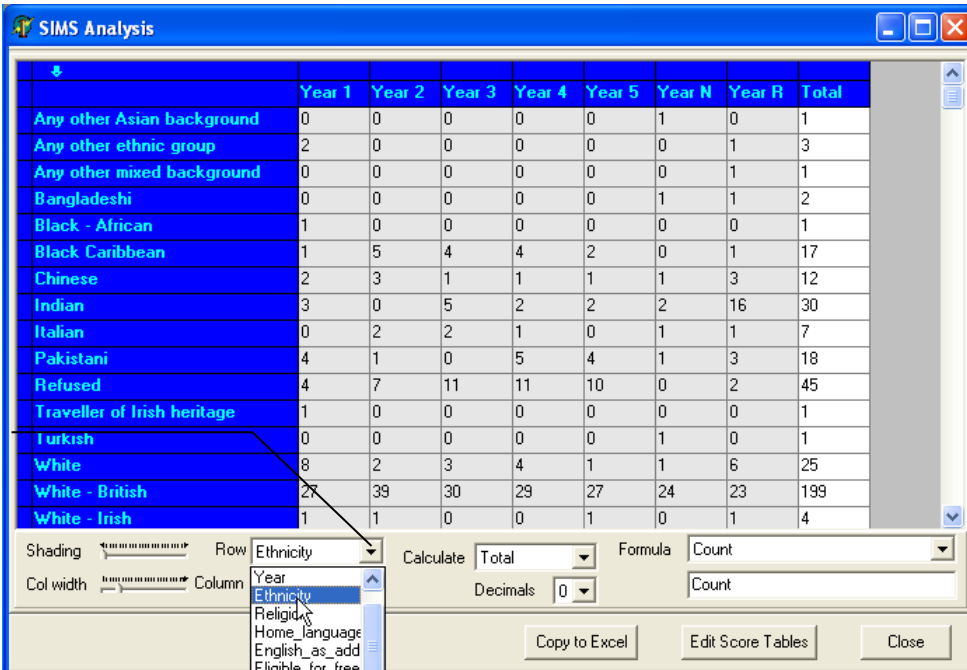
- To run the report, go to **Reports > Run Report** or click  on the Focus Bar. Your new report will appear in the **My Reports** folder and can be run in the usual way.

How to check if the mailing point has been set

- Run the report SITSS – Mailing Point check (this report is available on our website), accepting all in the parameter values to check the mailing point is set for all pupils.
- The report opens in Excel showing only those pupils with no siblings (i.e. they are the only member of their family) who DO NOT have the mailing point box ticked.
- Manually tick the box for all these pupils and then run the report again – it should then have no data.

A report showing the breakdown of ethnicity, gender, FSM & PP & Ever 6

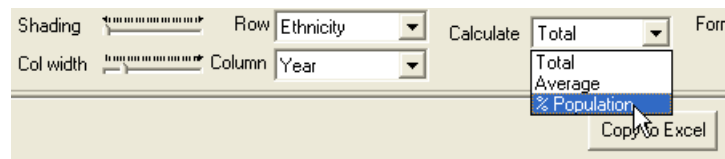
- Download the report **SITSS – Ofsted Report** from the SITSS website and import into Sims. (Alternatively if your school is using our Primary Assessment Resources may already have the *Ess Tools Analysis Report which you may run instead.)
- Run the report, choosing an effective date if needed.
- The SIMS Analysis window will open and you will then be able to choose different options for the rows and columns.



	Year 1	Year 2	Year 3	Year 4	Year 5	Year N	Year R	Total
Any other Asian background	0	0	0	0	0	1	0	1
Any other ethnic group	2	0	0	0	0	0	1	3
Any other mixed background	0	0	0	0	0	0	1	1
Bangladeshi	0	0	0	0	0	1	1	2
Black - African	1	0	0	0	0	0	0	1
Black Caribbean	1	5	4	4	2	0	1	17
Chinese	2	3	1	1	1	1	3	12
Indian	3	0	5	2	2	2	16	30
Italian	0	2	2	1	0	1	1	7
Pakistani	4	1	0	5	4	1	3	18
Refused	4	7	11	11	10	0	2	45
Traveller of Irish heritage	1	0	0	0	0	0	0	1
Turkish	0	0	0	0	0	1	0	1
White	8	2	3	4	1	1	6	25
White - British	27	39	30	29	27	24	23	199
White - Irish	1	1	0	0	1	0	1	4

Change the Row as required ie. Ethnicity, EAL etc

- If preferred, percentages can also be shown by selecting % Population on the Calculate drop down list.



- Clicking **Copy to Excel** will take the information on screen directly to Excel. This will allow you to save and print the information if required.

A report to check where there are missing, postcodes, UPNs & ethnicity

There are a number of SITSS reports that are useful for checking you have all the information recorded. (Especially useful before PLASC!)

- To find addresses with missing post codes run **SITSS – Post Code is Blank**

Post Code is Blank

Forename	Surname	Postcode	Reg
Christina	Zhang		2JB
Anna	Clarkson		5BB
Tina	Zhang		ASH

- For missing UPNs run **SITSS – School List with UPN** or **SITSS – Blank UPN list**.

	A	B	C	D	E	F	G	H
1	Surname	Forename	UPN	Year	Reg	DOB	Gender	
2	Abu-Koash	Frederik	B820200104001	Year 3	3CB	05-Aug-98	M	
3	Ackroyd	Marcus	T820200100036	Year 4	4SL	21-Jan-96	M	
4	Ackroyd	Mary	L820200100003	Year 4	4SL	10-Nov-95	F	
5	Addison	Millie	H820200100001	Year 4	4SL	28-Apr-96	F	
6	Adedeji	Payal	Q820200104002	Year N	PM	03-Mar-02	M	
7	Agathocleous	Stelios	A82020010401A	Year N	PM	18-Jun-02	M	
8	Ahmad	Arfa	E820200102001	Year 1	ASH	30-Nov-98	F	
9	Ahmad	Carina	E820200104003	Year N	AM	01-Sep-01	F	
10	Ahmed	Mohan	U820200104004	Year 1	ASH	05-Jan-99	M	
11	Allcroft	Catherine	V820200100020	Year 3	3CB	21-Dec-96	F	
12	Allen	Megan		Year 3	3TO	05-Apr-96	F	
13	Allim	Farah	N82020010402A	Year N	PM	27-Dec-01	F	
14	Amiel	Tanzeel	Q820200103001	Year R	ASH	02-Jul-00	F	
15	Anderson	Jacob	E820200103002	Year 1	ELM	23-May-99	M	

- For Missing Ethnicity Information run **SITSS Ethnic Info Missing**.

Ethnic Information Missing



Surname	Forename	Adno	Year	Reg	Ethnicity	Ethnic data source	Mother tongue
Ahmad	Carina	781	Year N	AM	Kashmiri Pakistani		Other
Allcroft	Catherine	555	Year 3	3CB	Refused		English
Antas	Sergei	723	Year 3	3TO	Refused		Other
Aperen	Alexandra	685	Year 1	OAK	Refused		English
Araujo	Hitesh	817	Year R	ASH	Indian		English
Baggley	Christopher	792	Year N	AM	White - Irish		English
Basra	Jilna	819	Year R	ASH	Indian		English
Benito	Eduardo	707	Year 2	2GH	Black Caribbean		English
Bland	Rodney	836	Year R	PINE	White Eastern European		English
Boman	Jenni	844	Year N				
Buckley	Helena	823	Year R	ELM	White - English		English
Burlison	Angus	828	Year R	OAK	White - English		English
Burnside	Francesca	829	Year R	OAK	White - English		English

Changing the output of a report?

Reports can be output in several different formats; the most commonly used are:

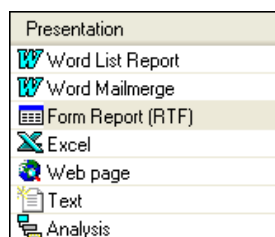
- Word:**
- Word List** Output as a standard Word table with borders.
 - Form Report** Output as a table, but borders have to be added. More flexibility, and can define page breaks.
 - Mail merge** For mail merge labels and letters.
- Excel:** Output to an Excel spreadsheet, so can control printing and add gridlines. Can then also add formulas.

If you wish to change the choice of output, you can change the design of the report.

1. Go to **Reports > Design Report** or click  on the Focus Bar and click the **Open** button . Select the report to be altered and click **OK**.
2. In the **Report Summary** area, click on the hyperlink for **Default Output** (you may have to scroll down the summary to see this).



3. The types of output are now shown at the top of the screen, and you can choose the new output from the list. Depending on which one is selected you will get other options such as page orientation (Portrait or Landscape settings) and options to create or edit templates.



4. To save your changes to the report, click the **Save** button. To save as a new report, click the drop down next to the **Save** button and choose **Save As**. You can amend the name of the report at this point if required. If you have made changes to an imported report, you will **ONLY** get the **Save As** option.



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