



THE BUSINESS OF EDUCATION

Hertfordshire County Council offsite visit forms and School trip financial reconciliation spreadsheet

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Offsite visit forms and school trip financial reconciliation

Importing the appropriate reports.

The following reports are available to run for specific registration groups or, for those pupils/students that are going on a specific trip, they can be run as User Defined Groups (UDG).

Please ensure that pupils have only one contact 1 and one contact 2 or an error will occur when running reports.

We recommend that once imported, the reports are placed into a **Category** of Offsite Visits to ease navigation. (Step by step instructions for creating a Category is given on page 4).

Focus > Student *(The following reports can be filtered by Reg Group(s):*

- **OV REG - Initial Trip Letter.** *A basic letter relating to instalments. This needs to be edited to your schools' preferred style. Please refer to 'Modifying Mail Merge Letters' on page 7.*
- **OV REG - Instalment Reminder.** *A basic letter relating to missed payment.*
- **OV REG - OV10 Missing Person.** *An HCC standard form. This form is to be used by the group leader to provide information to the Police or other Emergency Services in the event of someone going missing during an offsite visit.*
- **OV REG - OV7A Consent.** *An HCC standard form. Parental consent for a specific trip.*
- **OV REG - OV7C Annual Consent.** *An HCC standard form. Parental consent for the year. **NOTE:** It is imperative that information is checked prior to each trip in case of changes to medical, dietary and contact information.*
- **OV REG - Photo Sheet.** *A print out of pupil photos.*
- **OV REG – School Journey Pink Book (Y&R).** *Creates an excel reconciliation spreadsheet detailing expenditure and income.*

Focus > Student *(The following reports can be filtered by User Defined Groups):*

- **OV UDG – OV10 Missing Person.** *An HCC standard form. This form is to be used by the group leader to provide information to the Police or other Emergency Services in the event of someone going missing during a visit.*
- **OV UDG – OV7A Consent.** *An HC standard form. Parental consent for a specific trip to be sent to a user defined group.*

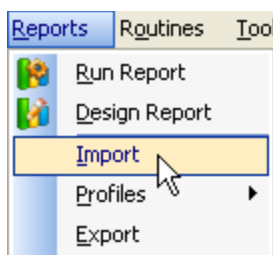
- **OV UDG - OV7C Annual Consent.** An HCC standard form. *Parental consent for the year. **NOTE:** It is imperative that information is checked prior to each trip in case of changes to medical, dietary and contact information.*

Focus > Group:

- **OV REG - Medical & Dietary Needs.** *List of all pupils and details medical and dietary needs.*
- **OV REG - OV8 – Contact Information.** An HCC standard form. *Summary of pupil information – name, d.o.b., primary contacts 1 and 2. **NOTE:** does not include medical or dietary information. This information must be checked and manually input into the report to ensure information contained within SIMS is up to date.*
- **OV UDG - Medical and Dietary Needs.** *Prints user defined groups with medical and dietary information.*
- **OV UDG - Photo Sheet.** *Prints pupil photos for user defined groups.*
- **OV UDG - Initial Trip Letter.** *A basic letter relating to instalments for user defined groups.*
- **OV UDG - Instalment Reminder Letter.** *A basic letter relating to missed payments to be sent to a user defined group.*
- **OV UDG - OV8 Contact Information.** An HCC standard form. *A summary for a user defined group detailing pupil name, d.o.b, primary contacts 1 and 2. **NOTE:** does not include medical or dietary information. This information must be checked and manually input into the report to ensure information contained within SIMS is up to date.*
- **OV UDG School Journey Pink Book.** *Creates an excel reconciliation spreadsheet detailing expenditure and income.*

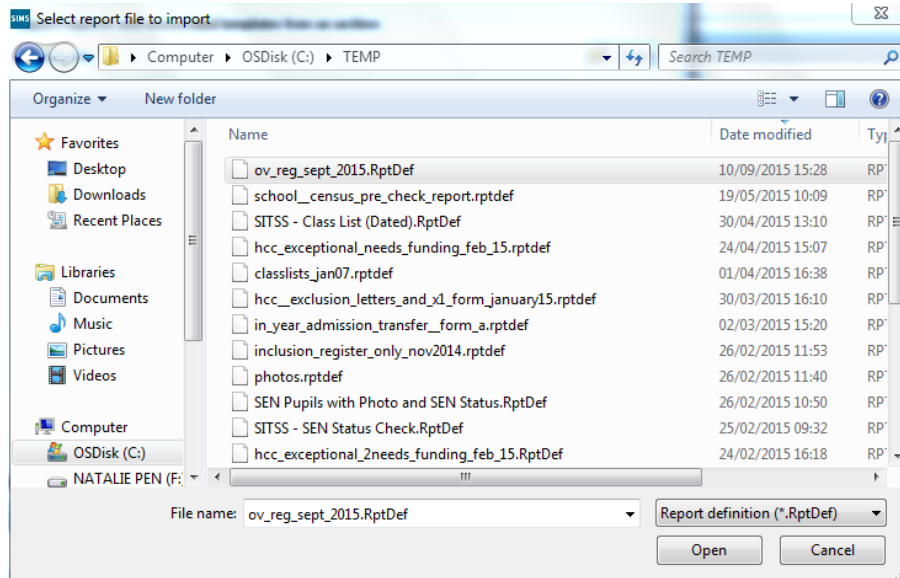
Importing the Reports into SIMS

1. Click on **Reports > Import**

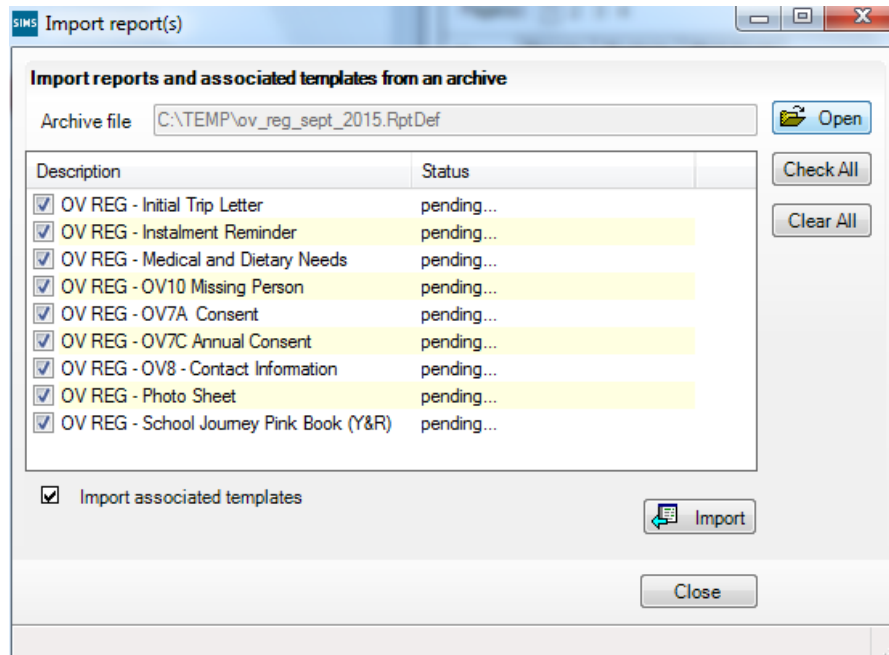


2. Click the **Open** button and navigate to where you saved the report.

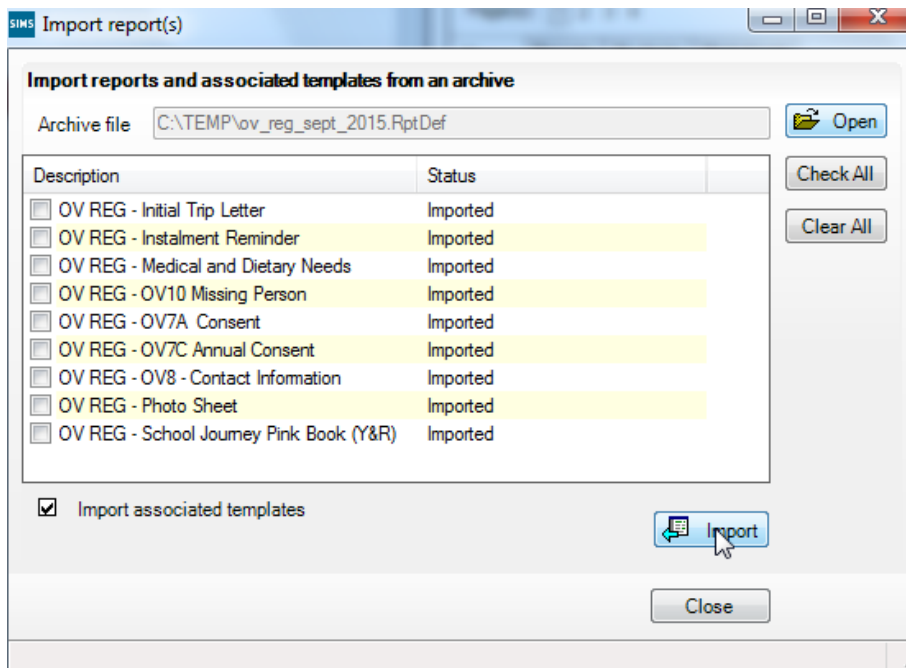
3. Select the **Report** file and click **Open**.



4. The following screen will open.





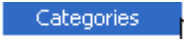

5. Click the **Import** button. The **status** will change to **Imported**. The reports will have been imported into both the Student and Group Focus.



6. Click **Close** on the Import report(s) screen.





Creating a category of Offsite Visits

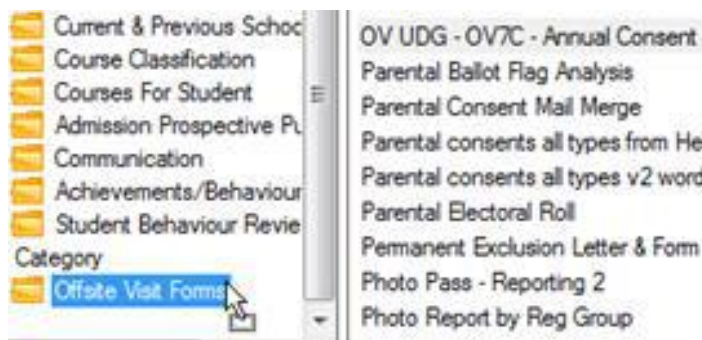
If you will be using both the REG and UDG then you may wish to create two separate categories. Alternatively you can create just one category for Offsite Visits.

1. Click on Reports > Design Report
2. Click on  [Open an existing report](#)
3. Click on  Tools
4. Click on 
5. Click on  type in a name for your category
6. Click **OK** on the Category Name dialogue box
7. Click **OK** on the Report Category dialogue box











Note: If another SIMS user has created a category this will be listed and can be accessed by putting a tick in the check box.

To move the reports into the Category of Offsite Visit

1. Click on the + by Category  Category
2. Click + by Focus  Focus
3. Click the folder for Student  Student or Group  Group depending which Focus your report has been imported to. (Pages 1 and 2 confirms where the reports will be listed ie. Focus > Student or Focus > Group.
4. Navigate to the report to be moved/copied into your new Category.
5. Left click on the report, keeping the mouse button suppressed (the report will be highlighted blue).
6. Drag the report to the Offsite Visit category (the category will turn blue identifying which folder it will be copied to). Release the mouse.



Creating a User Defined Group (UDG) for a Specific Trip

1. From the Menu Bar click on **Focus** , then **Groups** then **User Defined Groups**
2. Click on  **New** below Maintain User Defined Groups.
3. Complete the Group Description **Group Description** , press **Tab**, type the letter **A** in the Active window, press **Tab** type in a Code **Short Name** . This is the code you will need to enter when running reports for this group.
4. Add the Main Supervisor by clicking on  **Browse to the Supervisor**
5. Click on  at the end of Effective Date Range.
6. Click on the radio button for Custom Dates **Custom dates** .
7. Click on  at the end of the From box then double click on the start date of the trip. Now click on  at the end of the To box and double click on the end date of the trip. Click **OK** once your chosen dates are shown.
8. Click on  **Action** Add Supervisor.
9. Click on  **Search** click on the person required then click **OK**.
10. Type the letter **M** in the red field for Supervisor Title so that Main Supervisor is filled in.
11. Click **OK** then **OK** again to return to User Group Details.
12. Click on **Membership** amend the Effective Date Range as in 6 above.
13. Click on  **Action** then **Add Member** .
14. You are able to use the criteria boxes to limit your search or leave **Group Type** and click on  **Search** .
15. Click on the first person to be included then continue your selection holding down the **Ctrl** whilst doing so. Click **OK**
16. Once all members of the groups have been added click on  **Save** .

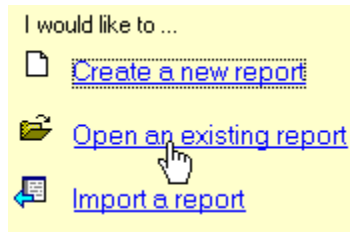
You are now ready to run reports please ensure that you enter the **Short Name** as entered in your UDG the parameter box.







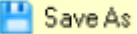

Enter Group code:	Value	<input type="text" value="S7"/>
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Modifying Mail Merge Letters for your school

Letters can be modified by editing the template of the report.

1. Click on **Reports > Design Report** then
2. Click Open an existing report.



3. Click on the + by  Category to expand the folder then click on folder  Offsite visits
4. In the right hand pane double click on the letter report you wish to amend
5. In the **Report Summary** click on  Default Output: then  in the right hand pane.
6. Amend the letter as required and then click  . Close Word by clicking 
7. Click on  Save As . Give your report a title, ensure that  Private does not have a tick in it then click **OK**

Your report will show under  My Reports in the **Report Browse**. Drag and drop your report into the Offsite Visit Folder you created earlier.



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