## PRIMARY SCHOOL TRANSFER DATA

A SIMS report file (.rptDef) containing Primary Data fields to export from SIMS has been created for you and attached to this email. - Report Name: Primary Transfer Data (Fil Yr Group).RptDef

The Report extracts the following fields from SIMS and creates an Excel Spreadsheet:

- 1. Destination Institution
- 2. UPN
- 3. Legal Forename
- 4. Legal Surname
- 5. % Attendance to date
- 6. FSM
- 7. SEN Status
- 8. SEN Needs (Need Type and Need Code)
- 9. Exclusion Count
- 10. Child Protection Plan (Count)\*

 [Student]

 Destination Institution

 UPN

 Legal Forename

 Legal Sumame

 % Present + AEA [% Attendance to date]

 Eligible for free meals [FSM]

 SEN Status Code [SEN Status]

 SEN Needs

 Need Type Description [SEN Need Type]

 Need Type Code [SEN Need Code]

 Exclusions [Exclusion Count]

 Child Protection Plan [CPP]

\*CPP Information will only be extracted if the SIMS User account has the permissions to view this information. If the report is generated from an account without these permissions the CPP count will be omitted.

To use the report it must first be imported into SIMS. You may have already done this last year and in this instance you would just follow the instructions on page 2 **RUNNING THE REPORT IN SIMS** 

- 1. Save the report file to a location which is accessible (for example C:\ or Desktop)
- 2. From within SIMS follow this route: <u>Reports/Import</u>
- 3. Click the Open button and navigate to where the report has been saved/stored

Import report(s)	Select report file to import	
Import reports and associated templates from an archive	C ⊂ E Desktop →	<ul> <li>✓ ✓ f Search Desktop</li> </ul>
Archive file 🖉 Open	Organize 🔻 New folder	
Description     Status     Check All       Clear All     Clear All       Import associated templates     Import	<ul> <li>★ Favorites</li> <li>Desktop</li> <li>Downloads</li> <li>Recent Places</li> <li>Computer System Folder</li> <li>Computer System Folder</li> <li>School Census File folder</li> <li>Music</li> <li>Pictures</li> <li>Videos</li> <li>Rohert</li> </ul>	Robert System Folder Network System Folder AbsenceRecord Shortcut 884 bytes Primary Transfer Data (Fil Yr Group).RynDef RPTDEF File
Close	File name: Primary Transfer Data (Fil Yr Group).RptDe	ef   Report definition (*.RptDef)  Open Cancel .ti

- 4. Click on the report name and click on the Open button
- 5. Click on the Import button, the status will change from pending to Imported.

sins Import report(s)			sims Import report(s)		
Import reports and associated templat Archive file C:\Users\robert\Desktop\	<b>es from an archive</b> Primary Transfer Data (Fil Yr Group	).RptDef 😰 Open	Import reports and associated to Archive file C:\Users\vobert\De	<b>emplates from an archive</b> sktop\Primary Transfer Data (Fil Yr G	roup).RptDef
Description	Status	Check All	Description	Status	Check All
<ul> <li>Primary Transfer Data (Fil Yr Group)</li> <li>Import associated templates</li> </ul>	pending	Clear All	Primary Transfer Data (Fil Yr Grou		Clear All
		Close			Close

6. The report has now been Imported, Click on the Close button.

## **RUNNING THE REPORT IN SIMS**

Using the report:

- 1. From within SIMS follow this route: <u>Reports\Run Report</u>
- Double click on the Focus (folder) and then click on the Student (folder)
   Report Browse

My Reports	*	Name	Focus	Owner
Favourit		Primary Transfer Data (Fil Yr Group)	Student	Imported
Focus	-	Progress Matrices - Fil (11 10)	Student	
Staff		Progress Matrices - Fil (Yr 11)	Student	
Class		Progress Matrices - Fil (Yr Grp)	Student	
Aspect		Progress Matrices Sub Lvl - Fil (Yr 10)	Student	
		Progress Matrices Sub Lvl - Fil (Yr 11)	Student	
Group		Progress Matrices Sub IvI - Fil (Yr Grp)	Student	
Room		Progress Tracking Spreadsheet (BLMH)	Student	
Period		Progress Tracking Spreadsheet (Level)	Student	
		Progress Tracking Spreadsheet (Scores)	Student	
		Program Tracking Competence (TA Lough	Chudoet	

3. Scroll down (the right hand panel) to the report called: Primary Transfer Data (Fil Yr Group)

-	Select All Year 07		
Year group	Clear All Year 09 Year 10		E
Accept All (bypass filter condition)	Show All Year 11		Ŧ
Destination Institution:	Uxbridge Co	s Community College Ilege	
Accept All (bypass filter condition)	Vyners Scho	ol	
		ОК	Cancel

- 4. Double click the report to run the report
- 5. Select the Year group (Year 6/Year 06)
- 6. If Destination Institutions have been entered into SIMS (School History Panel) for any students who will be leaving/or have already left a dropdown of selectable institutions will be listed. Selecting an institution will filter the students who will be exported to the Excel Spreadsheet. If Destination institutions have not been entered into SIMS please click on the <u>Accept All (bypass filter condition)\*</u> in the Destination Institution Panel.

\* If the bypass has been selected **ALL** Year 6 students will be exported to the Excel Spreadsheet and their Destination institution will have to be entered manually into the spreadsheet.

1.0			-									
	A	В	С	D	E	F	G	Н	I. I.	J	К	L
	1 Destination Institution	UPN	Legal Forename	Legal Surname	% Attendance to date	FSM	SEN Status	SEN Need Type	SEN Need Code	<b>Exclusion Count</b>	CPP/	Safe Guarding Issues
	2	U00000000001	Forename 1	Surname 1	100.00	F				0	0/	
	3	U00000000002	Forename 2	Surname 2	90.67	т	K	No Specialist Assessment	NSA	0	0	Y
	4	U0000000003	Forename 3	Surname 3	98.67	F				0	0	
	5	U00000000004	Forename 4	Surname 4	100.00	F	N			0	0	Y
	6	U000000000005	Forename 5	Surname 5	98.00	F	N			0	0	

At the end of the spreadsheet's columns (**K** if CPP has been omitted or **L** if CPP is present) please could ' you add the title 'Safe Guarding Issues' into Row 1. If a student currently/or previously has/had any Safe Guarding Issues please can you indicate with a 'Y' next to that student.

Please could you also add 4 additional columns at the end of the spreadsheet after Safeguarding Issues. Add the titles 'Reading', 'Writing', SPAG, and Maths to include Teacher Predicted attainment levels for the end of the year. Please ensure we all use the same coding BELOW, WORKING TOWARDS, EXPECTED, and HIGHER.

Please be aware that some students may appear more than once on the spreadsheet if they have multiple SEN Need Types. Each need type is treated as a new record (row).

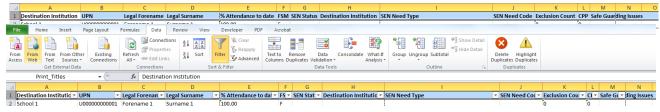
## HOW TO FILTER AND SAVE THE SPREADSHEET PER SECONDARY SCHOOL

The following information is for Excel 2010 – there may be some minor differences between earlier or later versions.

Once all the Destination Institutions have been entered into the Spreadsheet you can add a filter which will aid in collating the data for each destination institution:

A	В	С	D	E	F	G	Н	I. I.	J	K	L	M	N
1 Destination Inst	tution UPN	Legal Forename	Legal Surname	% Attendance to date	FSM	SEN Status	<b>Destination Institution</b>	SEN Need Type	SEN Need Code	<b>Exclusion Count</b>	СРР	Safe Guar	ding Issues
2 School 1	U000000000001	Forename 1	Surname 1	100.00	F					0	0		
3 School 2	U00000000002	Forename 2	Surname 2	90.67	Т	К		No Specialist Assessment	NSA	0	0	Y	
4 School 3	U00000000003	Forename 3	Surname 3	98.67	F					0	0		
5 School 4	U00000000004	Forename 4	Surname 4	100.00	F	N				0	0		
6 School 5	U00000000005	Forename 5	Surname 5	98.00	F	N				0	0	Y	
7 School 1	U00000000006	Forename 6	Surname 6	93.33	F					0	0		
8 School 2	U00000000007	Forename 7	Surname 7	98.67	F					0	0		
9 School 3	U0000000008	Forename 8	Surname 8	98.67	F	к		Speech, Language or Communication Need	SLCN	0	0		
0 School 4	U00000000009	Forename 9	Surname 9	98.67	т	к		Speech, Language or Communication Need	SLCN	0	0		
1 School 5	U00000000010	Forename 10	Surname 10	98.67	F					0	0		
2 School 3	U00000000011	Forename 11	Surname 11	99.67	F					0	0	Y	
3 School 4	U00000000012	Forename 12	Surname 12	99.33	F					0	0		
4 School 1	U00000000013	Forename 13	Surname 13	99.67	F	E		Autistic Spectrum Disorder	ASD	0	0		
5 School 1	U00000000014	Forename 14	Surname 14	100.00	F					0	0		
6 School 1	U00000000015	Forename 15	Surname 15	87.00	т	к		Social, Emotional and Mental Health	SEMH	0	0	Y	
7 School 2	U00000000015	Forename 15	Surname 15	87.00	т	К		Moderate Learning Difficulty	MLD	0	0	Y	
8 School 1	U00000000017	Forename 17	Surname 17	98.00	F					0	0		
9 School 2	U00000000018	Forename 18	Surname 18	100.00	F					0	0		
0 School 3	U00000000019	Forename 19	Surname 19	92.31	F	N				0	0		
1 School 5	U00000000020	Forename 20	Surname 20	97.33	F					0	0		

## 1. Click on row 1



2. Click on the data tab and filter

		3. Click o	on the	Destination	Institution D	ropdown/Filter	r A	Arrow					
1 2↓ Z↓	Destin Sort A Sort Z Sort by	:o A	4.	Select t	ne Destinatio	n Institution ar	nd	l press OK					
*	Cle	A		В	С	D		E		F	G		
	те 1	Destination Inst	titutic 🕶	UPN 💌	Legal Forenan 🔻	Legal Surname	-	% Attendance to da	Ŧ	FS 🔻	SEN Stat 💌 D		
	Se 2	School 1		U000000000001	Forename 1	Surname 1	1	100.00		F		_	
V	7	School 1		U000000000006	Forename 6	Surname 6	1	93.33	_	F		5.	The
	14	4 School 1		U00000000013	Forename 13	Surname 13	1	99.67	_	F	E	filte	ered
	1	5 School 1		U00000000014	Forename 14	Surname 14	1	100.00	C				
	1	5 School 1		U000000000015	Forename 15	Surname 15		87.00		opy aste Option	IS:	stu	dents
	_	School 1		U000000000017	Forename 17	Surname 17	-	98.00	Ē			can	then
	2									aste <u>S</u> pecial	······	cun	then
35		Canter	be	selected, co	pied and pas	ted to a new sp	pr	readsheet	-	elete			
35									C	lear Co <u>n</u> ten	ts		
		A	В	С	A	B C		D	E	ormat Cells.			
	1	Destination Institutic -	UPN	Legal Forenan	1 Destination Institutio	🕶 UPN 🔄 💌 Legal Foren	an	<ul> <li>Legal Surname</li> </ul>					
	2	School 1	U00000000	001 Forename 1	2 School 1	U000000000001 Forename 1		Surname 1					
	7	School 1	U00000000	006 Forename 6	7 School 1	U00000000006 Forename 6		Surname 6					
	1	School 1	U00000000	013 Forename 13	14 School 1	U00000000013 Forename 1		Surname 13					
	1	5 School 1	U00000000	014 Forename 14	15 School 1	U00000000014 Forename 1	_	Surname 14					
	1	5 School 1	U00000000	015 Forename 15	16 School 1 18 School 1	U000000000015 Forename 1 U000000000017 Forename 1		Surname 15					
		School 1	U00000000	017 Forename 17	22	COUCCULT Forename 1	./	Surname 17					
	2	2			22								

Click here to the left of Column 'A' and above the top Row or Press CTRL A. This will highlight all the data on the spreadsheet. Press CTRL C or Right Click and Copy. Open a new Spreadsheet and press CTRL P or Right Click and Paste.

Save the new Spreadsheet and send **securely** to the relevant secondary school via the School to School system.