Reporting
Producing School Census Reports

Due to the sensitive nature of some of the data stored in SIMS, careful consideration should be given when specifying the location of any folder into which you save sensitive data, e.g. Census returns, imported and exported CTFs, etc.

You should be mindful of your school's responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a server. Please refer to the government website for more information about securing your information (https://www.gov.uk/service-manual/technology/securing-your-information). If you are in any doubt, consult with your IT Security Officer before proceeding.

Before producing any School Census reports, the data must be calculated and saved, and the return created and validated.

All School Census reports are saved automatically in the folder specified in the **Census Return** browser, e.g. `S:\SCHOOL CENSUS`. For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

After the return is authorised, the reports can be viewed by selecting **Tools | Statutory Tools | Retrieve Authorised Census Return Files**. For more information, please see *Retrieving Authorised Census Return Files* overleaf.

Creating the Return

1. Select **Routines | Statutory Returns | School Census** to display the **Census Return for <term><year>** browser.

2. Ensure that the required **Term** is selected and that the required **Census Folder** (in which the return files will be stored) has been specified.

3. Ensure that the required **Security Message for Reports** is displayed.

   By default, `This report contains sensitive information` is displayed at the top of each detail report and the Validation Errors Summary report. Edit the default text, if required.

4. Click the **New** button to create a new return. Alternatively, click the **Search** button then double-click the required **File Name** in the subsequent list to display the **Census Return Details** page.

5. Ensure that you **Calculate All Details** at least once.

   *IMPORTANT NOTE: Clicking the **Calculate All Details** button overwrites any edited data and previously collected data (in every panel where details are calculated automatically) with the data currently stored in SIMS.*

6. Check and complete the details in the remaining panels. For more information, please refer to the School Census Return handbook that is applicable to your school phase and the current return.

7. Click the **Create & Validate** button.

   Messages inform you if additional information is required, e.g. **Some attendance marks are missing**.

   Validating the return creates an unauthorised return file, which is then run against a set of DfE rules. When the validation is complete, a list of errors and queries is displayed in the **Validation Errors Summary** panel at the bottom of the **Census Return Details** page.

Producing the Validations Errors Summary Report

Click the **Report** button (located at the top left-hand side of the **Validation Errors Summary** panel) to view the Validation Errors Summary report in your web browser, from where it can be printed, if required.

The filename consists of the following data fields, separated by underscores ('_'):

`<LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_`
`<SerialNumber>_ValidationErrorsSummary.html`

Producing Detail Reports

Detail reports can be used to check the data stored in SIMS that has been used to create the return.

The reports can be produced as soon as the return has been validated.

Each detail report header displays the **Security Message** (defined in the **Census Return** browser), the **Report Criteria** and the **Total Pupil/Students** that are listed in the report.

Also shown at the top of the report is the **School Name**, the **Fileset Number**, the **Filename**, the **Report Created** date and the **XML Version**.

NOTE: The number of reports available in each return depends on the School Census term (i.e. Autumn, Spring or Summer) and your school phase.

Generating Detail Reports

To run a single detail report, select the required report from the **Detail Report** drop-down list, which is located at the top of the **Census Return Details** page.

The selected report is generated automatically and displayed in your web browser, e.g. Microsoft® Internet Explorer®.

To run several detail reports, select **Multiple Reports** from the **Detail Report** drop-down list to display the **Detail Reports** dialog.

The reports available for selection are dependent on your school phase and school term.

By default, all detail reports are selected. If any reports are not required, deselect the associated check box.

Click the **Report** button to generate the selected report(s).

The report(s) are displayed in your web browser, from where the data can be transferred to a spreadsheet, such as Microsoft® Excel, if required.

The reports are saved automatically in the **Census Folder** (specified in the **Census Return** browser).

For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or Local Support Unit.

The report is saved with a filename that consists of the following data fields, separated by underscores ('_'):

`<LACode><SchoolNumber>_<SurveyType>_`
`<LACode><LL><ear>_<SerialNumber>_<name of the report>_`
`detail_report.html`
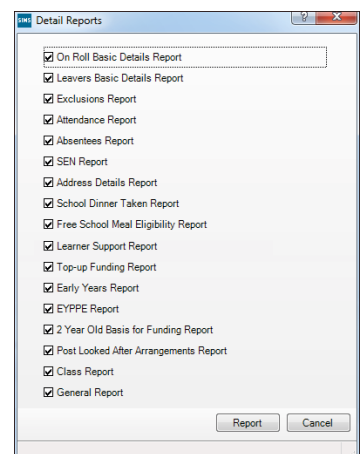
Producing the Summary Report

The Summary report enables the accuracy and completeness of the return to be assessed by the school staff involved in preparing the return. It can also be used to assist the Head Teacher in the checking of data before authorising the return.

When the School Census return is authorised, the Summary report is generated automatically and displayed in your web browser, e.g. Windows® Internet Explorer®. However, the report can be run at any time after the return is created and validated.

Generating the Summary Report

Click the **Summary** button located at the top of the **Census Return Details** page. The report is displayed automatically in your web browser but can be transferred to a spreadsheet, such as Microsoft® Excel, if required.

The report is saved with a filename that consists of the following data fields separated by underscores ('_'):

`<LACode><SchoolNumber>_<SurveyType>_<LACode><LL><Year>_<SerialNumber>_<name of the report>_Summary_Report.html`.

Producing the Authorisation Report

Before authorising the return, you should ensure that all the information displayed on the **Census Return Details** page is correct and does not require further editing. This is best achieved by reviewing the Summary report.

1. Click the **Authorise** button.

   If missing attendance marks exist, a message is displayed (applicable to schools from which attendance data is collected only).

2. Click the **No** button to return to SIMS, where edits to the attendance data can be made or click the **Yes** button to continue.

   A message is displayed to remind you that the return cannot be edited once it is authorised.

3. Click the **Yes** button to continue or the **No** button to return to SIMS, where edits can be made to the data before authorising.

4. If you choose to continue, the **Head teacher authorisation** dialog is displayed.

5. Enter any additional text that you want to display on the authorisation report, if required. This may be requested by your LA, e.g. to explain the reason for any validation failures.

6. Select the confirmation check box to confirm that the Head Teacher is satisfied that the Summary and/or detail reports have been checked and that the return file is ready for upload to your LA/DfE.

7. Click the **Continue** button to authorise the return.

The Summary report and the Authorisation report are generated automatically and displayed in your web browser, from where they can be printed, if required.

Printing a Report from your Web Browser

IMPORTANT NOTE: *Any printed reports containing information that could identify a person (e.g. their name, address, UPN, etc.) should be used for validation purposes* <u>only</u> *and should not be retained. The **Security Message** (displayed at the top of each report) can be customised to include instructions for the destruction of the printed reports, if required.*

1. With the generated report displayed in your web browser, select **File | Print** to display the **Print** dialog.

2. Ensure that the print settings are correct then click the **Print** button.

3. Click the **Close** button on the top right-hand corner of the web page to close the report and return to the **Census Return Details** page.

Transferring Report Data to a Spreadsheet

Transferring a report to a spreadsheet application enables the data to be sorted, the column order to be changed, etc.

In your web browser, right-click the report then select the required option, e.g. **Export to Microsoft Excel**, from the drop-down list.

The spreadsheet contains the same level of sensitive information as the original HTML report from which it was transferred therefore, it is <u>important</u> that the file is saved to a folder with the same level of security.

Retrieving Authorised Census Return Files

Authorised returns are stored in your Document Management Server (DMS). The Returns Manager can download and run the reports associated with previous authorised returns, enabling the data for the current return to be compared with that submitted previously.

1. Select **Tools | Statutory Returns Tools | Retrieve Authorised Census Return Files** to display the **Retrieve Authorised Return Files for <census name>** page.

2. Ensure that **School Census** is selected from the **Return Type** drop-down list, if required. The previous returns that match the selected criteria are displayed.

3. By default, the files **Download to** the folder specified in the census browser. If you wish to select or make a new folder, click the **Select a Folder** button (**...**).

   IMPORTANT NOTE: *Retrieved files contain sensitive information. Ensure that authorised personnel only have access to the download folder.*

4. Highlight the return you wish to retrieve then click the **Retrieve Files** button.

   The authorised return file (XML) and all reports associated with the selected return are downloaded from your DMS to the specified folder. The folder and its contents are then displayed automatically, enabling you to open the required reports in your web browser.

5. The contents of the specified folder can be viewed again by clicking the **Folder** button adjacent to the **Download to** field.

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