

Exporting primary school SEEMiS data for Parents Booking – instructions version 2.8

These notes detail how to create two reports to extract data for <u>Parents Booking</u> – one for exporting pupil and contact information and another for curricular data. These reports will later be uploaded to Parents Booking so as to create parents' evening events.

The first time you use this document, follow pages 2-7 to create the reports. You should only need to do this the first time. Each time (in the future) that you come back to run more events, you can pick up on Page 8-12.

Contents

Section 1: First Time Set Up

- Creating the Contacts report pages 2 5
- Creating the Curriculum/Teacher report pages 6 7

Please note that the creation of the above reports is a one-off exercise. Once they have been created they will be saved and can be run again for each future data extraction.

You can move directly to Section 2 if you or the school have previously completed Section 1.

Section 2: Extracting the two data spreadsheets you need

- Exporting the Contact information pages 8 9
- Optional: Changes to consider making to your Contacts file page 10
- Exporting the Curriculum/Teacher Information pages 11 12

Section 3: Optional Extra Advice

• Optional: How to set up your parents' evening events from start to finish - pages 13 - 14

Go to Application > Reports > Custom Reports

Click on the plus + sign next to Student and then Student



The student folder will open up as shown above

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	Pupil's property						
	💆 Pupil's town						
	UPRN						
	Catchment Status						
	Registration group						
	Reg. class						

In the list that appears under **Student**, find **SEEMIS Reference** and then click and drag the field over to the empty space on the right hand side of the screen.

Creating the Contacts Export					
Repeat this process for the following fields	S: -				
Known As					
Surname					
Date of Birth	These fields should appear on the right-hand				
Registration Group	side of the screen as shown below.				
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Alias

SEEMIS reference

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Known As

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Now, on the left-hand side of the screen, scroll down to the Contact folder. Click on the + sign to open the folder

Row Order

Direction

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Authority Defined	Registration group	Registration group				
New Authority Defined	Contact's title	Contact's title				
Exclusions	Contact's forename	Contact's forename				
School Defined	Contact's surname	Contact's surname				
Attendance Calc	Contact's telephone	Contact's telephone				
Contact	Parent's Email	Parent's Email				
Contact Contact gets report Contact's telephone (day Contact's forename				•		

Click and drag the below fields onto the right-hand side of the screen. Once completed, the screen should look the same as above.

Contact's Title Contact's Forename Contact's Surname Contact's Mobile Telephone Parent's Email

Next: Decide whether you want to import both parents (the 'Main Contact' and 'Parental Rights' contacts) or only 1 parent/guardian for each student (the 'Main Contact' in SEEMIS). We recommend uploading BOTH.

To import both parent/guardians, continue to page 4 •

Fields Conditions

SEEMIS reference

Registration group

Known As

Date of Birth

Surname

Name

and then click on the + sign in the Contact folder that appears below.

🚊 Date of Birth 8

8

8

8

Age in years

Age in months

Birthday month

Forename 8 Gender

Age in years and mon

• To import only one Parent/Guardian, skip page 4 and move to page 5 We recommend uploading a Mum <u>and</u> Dad wherever possible, e.g. Main Contact <u>and</u> Parental Rights parents/carers. This is not so that both parents can book, but so that either can. This will also allow both to join the same video meetings from different location if the situation arises (as is likely to be the case for some parents).

Instructions to import the 'Main Contact' and 'Parental Rights' parent/guardian contacts for each pupil:

Click on the **Conditions** tab



On the left-hand side of the screen, in this very specific order, find the below conditions in their respective 'sections' and drag them over to the conditions (blue) area...

- Student > Admission > Current Pupil
- Contact > Contact > Main Contact
- Student > Student > Year/Stage
- Student > Admission > Current Pupil
- Contact > Contact > Parental Rights
- Student > Student > Year/Stage

Also make sure that the first 'Year/Stage' has an 'OR' in this drop-down. All the other drop-downs should be 'AND', while the last should be blank.

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Application My Profile My Menu H	elp		
Design View Commission Com	Fields Conditions Current Pupil Year/Stage	ĺ	Save
Authority Defined Authority Defined Exclusions School Defined	Main contact		
Name the report Parents Evening Do not add a ' to the name (i.e. Po	and then click on Save.		Save Cancel

Now move to page 6 to create your 'Curriculum' custom report.

Tip: If you want to <u>only</u> upload Main Contact (which we do not recommend, we believe this will cause you extra work later where other parents need access and will not have access), use these instructions.

Instructions for schools who only want to import the 'Main Contact' from SEEMIS for each pupil:

Click on the Conditions t	tab —				
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Exclusions					

On the left-hand side of the screen, scroll back up to the **Student** folder and then drag over **Year / Stage**. Scroll back down to the **Contact** folder and then drag over **Main Contact**.

The **Conditions** tab should now look the same as the screenshot above.



Name the report Parents Evening and then click on Save. Do not add a 'to the name (i.e. Parents' Evening).

Save	×
	Filename Parents Evening
	Save Cancel

Now skip to page 6 to create your 'Curriculum' custom report

Go to Application > Reports > Custom Reports Curriculum

Select a **Stage** from the drop down list at the top of the screen (note – it doesn't matter which stage you select – this can be changed when running the report)

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Application My Profile My Menu Help	History 🚔 ≖•
Stage Second	ary 4
Absent to die (penings) Admission code (ichart code) Admission code (ichart code) Atts 10 [P1:50) Atts 20 [P1:50) Atts 20 [P1:50) Atts 20 [P1:50] Attendance in August Attendance in August Attendance in August Attendance in February Attendance in Jawary Attendance in March Attendance in September Attendance in September Attendance in September CSP CSP Current puol Date exclusion approved Date left Date of birth Date of birth Date March	Column Abbreviation Subject Level Section Title Teacher's fait name Teacher's Summe Subject name SG Presentation Level
Add Remove	Add Remove
Open List Save Ready	Next Training secondary 72

On the left hand side of the screen, double click on the following field:-

SEEMIS Reference

On the right hand side of the screen, double click on the following fields:-

Section Title Teacher's First Name Teacher's Surname Subject Name

Creating the	Curriculum/	Teacher	Export
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The fields you have double clicked on should now appear in the lower part of the screen, which should look like the screenshot below.

Year/stage Cycling Proficiency	*
Add Remove	Add Remove
SEEMIS reference	Section Title Teacher's first name Teacher's Surname Subject name
Open List Save	Next
Ready	Training secondary 72

Click on Save

Name the report Parents Evening and then click on Save

Save	
Parents Evening	
Save Cancel	

• •					
Go to Application > Reports > Custom Reports					
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From the list of reports that appears, select the Parents Evening report and then click on Open

Open X)
Filename	
Parents Evening	
Open Cancel	

Click on the conditions tab

Exporting the Contact information



Leave the Year/Stage field blank to extract the whole school. This will be easier than extracting certain year groups. Later you can decide to delete, or not include, certain register classes and year groups in your parents' evening.

Click on the View tab |

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Pupil's telephone	Fields Conditions								
	Current Pupil	Is true 👻							
Catchment Status	Year/Stage	Starts with 👻							
Reg. Class	Main contact	Is true 👻							
SEEMIS reference									
Surname									
Year/Stage									

The information to be exported will be displayed as shown below:

Application My P	rofile My Menu 9 🗙 🗳	Help				
SEEMIS reference	Known As	Surname	Date of Birth	Registration gr	Contact's title	Contact
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MICLIPHENELYS.	Jania	Lakahar	(MAR)1995	4.1	Mara I	No. No.
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Right click anywhere on the list and then left click on Copy All

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Even if you are exporting separate year groups, e.g. one year at a time, paste them all in to **the same spreadsheet**.

Save the spreadsheet as a <u>CSV (Comma delimited)</u>, (ideally the CSV UTF-8 if your Excel has this option) e.g. "March Parents Evening <u>Contacts</u> 2022"

There will be problems caused later if your Register Classes include commas, OR if register classes (such as "1/2", "2/3", "3/4", or "4/5") are used. Excel will think these are a date (such as "1/2" becoming 1st Feb and "2/3" becoming 2^{nd} March).

Fix these issues by changing the data in the Register Class (see figures 1 and 2 below), replacing all commas with a hyphen, OR changing the Reg Class to have a P in front, i.e. P1/2, P2/3, etc.

Example for how to change all commas in a spreadsheet to a hyphen:

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A	В	с	D	E	F	G	н	1	J	к	L	1	<u>G</u> 0 T0
1 SEEMIS reference	e Known As	Surname	Date of Bi	Registration group	Contact's title	Contact's forename	Contact's surname	Contact's telephone	Parent's E	mail		1	Go To Special
2 14N02024ED003	Rupert	Kinch	01-Jan-00	5,6,7	Mrs	Helen	Kinch						Form <u>u</u> las
3 07G56024EC010	Nicole	McDonald	01-Jan-00	5,6,7	Ms	Nicola	Kidd						Co <u>m</u> ments
4 07G31024EC008	Rhyanne	Watson	01-Jan-00	5,6,7	Miss	Lisa	Paterson						Conditional Formatting
5 07G56524EC010	Abbie	Watt	01-Jan-00	5,6,7	Mrs	Lisa Jane Kathleen	Watt						Constants
6 09H13722EC045	Cara	McGaff	01-Jan-00	5,6,7	Mrs	Susan	McGaff						Data Validation
7 07G13924EC024	Claire	McGhee	01-Jan-00	5,6,7	Miss	Debbie	Bernard						Data Validation
8 07F01824EC001	Adam	Aitken	01-Jan-00	5,6,7	Mrs	Nicky	Aitken					3	Select Objects
9 07G57424EC017	Jordan	McEwan	01-Jan-00	5,6,7	Mrs	Marie	McEwan					8	Selection Pane



Figure 2:

In this example, type a comma into the 'Find what' and a hyphen into the 'Replace with' and then press 'Replace All' to have the commas replaced by a – throughout your spreadsheet (which should just be in your Register Classes).

Remember to save your spreadsheet now that you have made these changes.

How to save is explained at the bottom of Page 9.

Go to Application OR My Profile > Reports > Custom Reports Curriculum

Click on the Open List button in the bottom left corner of the screen

Date or birth	
Doctor	
	Add Remove
	Open List Save
Ready	

Select **Parents Evening** from the drop down list and then click on **OK**

Select List :
 Parents Evening 🗸 🗸
OK Cancel

3 90XX072: Click+Go for Miss H Madsen - Custom Reports (Curriculum) - Training secondary 72								
Application My Profile My Menu Help								
	Stage	Seconda	ary 4 🔹					
Absences (last 8 weeks)			Column					
Absent to date (Openings)			Abbreviation					
Admission code (short code)			Subject Level					
Arts 1 (P1-56)		=	SG Presentation Level					

Click on Next in the bottom right of the screen

	le	
	acher's first name acher's Surname	
	bject name	
L	Next	Training secondary 72

Exporting the Curricular Information

The curricular information will be displayed. Ensure you 'view vertically' (do not change to view horizontally).

24ED003: Click+Go for Mr G Andrew - Custom Reports (Curriculum) - Lasswade Hig										
Application My Profile My Menu Help										
SEEMIS ref	Section	Title			Teacher's f	Teacher's	Subject name			
	ENCEA8	Miss			м.		English			
	MACEB9	Miss			с.	1 –	Mathematics			
	MSCEC2	MSCEC2 Mr		CEC2 Mr R.			R.		Modern Stu	
	BMCED2	Mrs			с.		Business Ma			
	SCCEEC	Mrs		Co	pv Selected		Science			
	PECEF2	Miss			,		Physical Edu			
	CRI1G2		Цŝ	Co	py All		Constructio			
	CPCEH1	Mr			A		Computing s			
	PRCEI2	Mr	1r Ӫ Pr		nt Selected		Product Design			
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Right click anywhere on the screen and then **left click** on **Copy all** Open a blank workbook in Excel



Click on the Paste button. All of the teachers for the stage you selected will be pasted in Excel.

<u>IMPORTANT – repeat these steps for all year groups:</u> You have only extracted teachers for the students who were in the Stage you picked earlier (Primary 1). You need to extract all other year groups and paste these (don't leave gaps) underneath the stage you have already pasted.

Now use "Back" in SEEMIS to retreat one screen to the Curriculum Report. Change the Stage and use "Next" to show the next stage's data. Paste this, and all future Stage's teachers (one at a time), in to <u>the same spreadsheet</u>. Keep pasting the data below the previous data. In the end you will have one spreadsheet with all years' teachers. You do not need the 'Headers' (SEEMiS reference, Section, Title, etc) between each year group, but you can also leave it if you prefer. Do not leave gaps between the year groups. This should be one big spreadsheet when you are done.

Save the spreadsheet

When you are finished, Save the spreadsheet as a **CSV (Comma delimited)**, (ideally the CSV UTF-8 if your Excel has this option) e.g. "March Parents Evening <u>Curriculum</u> 2022".

Optional: Instructions for how to set up a parents' evening from start to finish

We recommend that you download our **Admin Manual**, because it is a comprehensive manual, with pictures, showing you how to set up a parents' evening from start to finish. However, the below will also serve as a helpful guide for you.

Download our Admin Manual from here.

Steps required to set up a parents' evening:

- 1. Follow Pages 8 to 12 of this instructions guide and export the data for the relevant year(s). These steps will leave you with ONE .CSV spreadsheet for your parent <u>Contacts</u> and ONE for your <u>Curriculum</u>.
- Parents do not need an e-mail address to use the Parents Booking, BUT parents without an e-mail address parents will not be linked to all of their children. A unique e-mail address is the way we know two Mr John Smith's are the same parent, or two different parents, to use this name as an example. To link parents without an e-mail address to all of their children, let's open your <u>Contacts</u> spreadsheet and check parents are linked to all their children:
 - If you Sort the spreadsheet A-Z in the Parent First Name, and then Sort again A-Z the Surname column, you'll be able to put all of the parents next to each other.
 - If you see the same parent twice or more in the spreadsheet, and they do not have an e-mail, please enter one for both of their rows OR make one up (i.e. <u>a@a.com</u> or <u>b@b.com</u>). This will link the parent to both/all of their students. Making up an e-mail address does no harm as the parent will input their own e-mail when they login.
- 3. Once you're satisfied your spreadsheet is correct, let's go to Parents Booking (<u>www.parents-booking.co.uk</u>) and login as an Admin, then go to the 'Upload Data' tab.
 - Go down to the 'Add CSV File' button and upload the <u>Contacts</u> .csv file first
 - When the Parent Contacts file has uploaded 100%, upload the <u>Curriculum</u> .csv spreadsheet. Wait for this to also go to 100% before moving on.
- 4. Once the two spreadsheets have been uploaded, you can add any Pupil Support teachers, or other teachers who are not timetabled in SEEMIS (but who you want in the parents' evening). To do this:
 - Go to 'Teachers' tab and either edit the Pupil Support teachers OR, if they don't exist, add them ('Add New Teacher)
 - After you've added or found a Pupil Support teacher, 'edit' their account
 - Add all of the correct and relevant students to them using 'Add Child or Class'. The teachers won't appear in your event when you create it unless you add students to them.
- 5. Primary schools sometimes have classes which share teachers. If you would like to add a second teacher for a class, create the missing teacher on the Teachers page, then edit them and use the 'Add Students; button to add the class they teach to them.
- 6. Once you're happy that all of the data has been uploaded and extra teachers have been added or set up, go to 'Evenings' and create your event. You may need to create a new term or group, but then click on the correct Term or Group name and in side of this create your event.
- 7. Once you've set up your event, click the down arrow next to the 'Edit' beside your event and click on "Edit the Teachers in this Event" to check that there are no teachers missing, or to delete any you do not need to include.
 - If teachers need removed, tick them and then use 'Delete Selected' to remove them
 - Add new teachers in the Teachers tab by following step 4 above, then return to this page (the Edit the Teachers in this Event' page) and press 'Update' to bring the teachers into the event, then remember to once again remove any teachers who shouldn't be included
- 8. Finally, if you need to add breaks or block out times, once your parents' evenings has been set up:
 - Go to 'Dashboard' tab > blue Options button > Add Breaks

9. You can now send out a letter to parents inviting them to book. If you would like to download out template instruction letter for parents, go to https://knowledge.parents-booking.com/support/essential-downloads/