

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

These notes detail how to create two reports to extract data for [Parents Booking](#) – 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

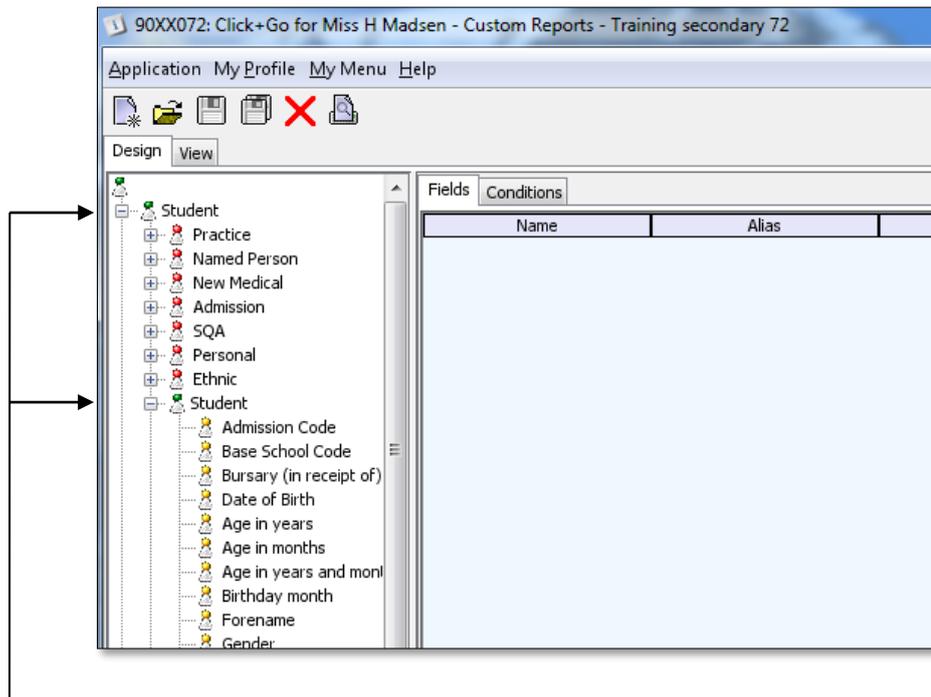
Section 3: Optional Extra Advice

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

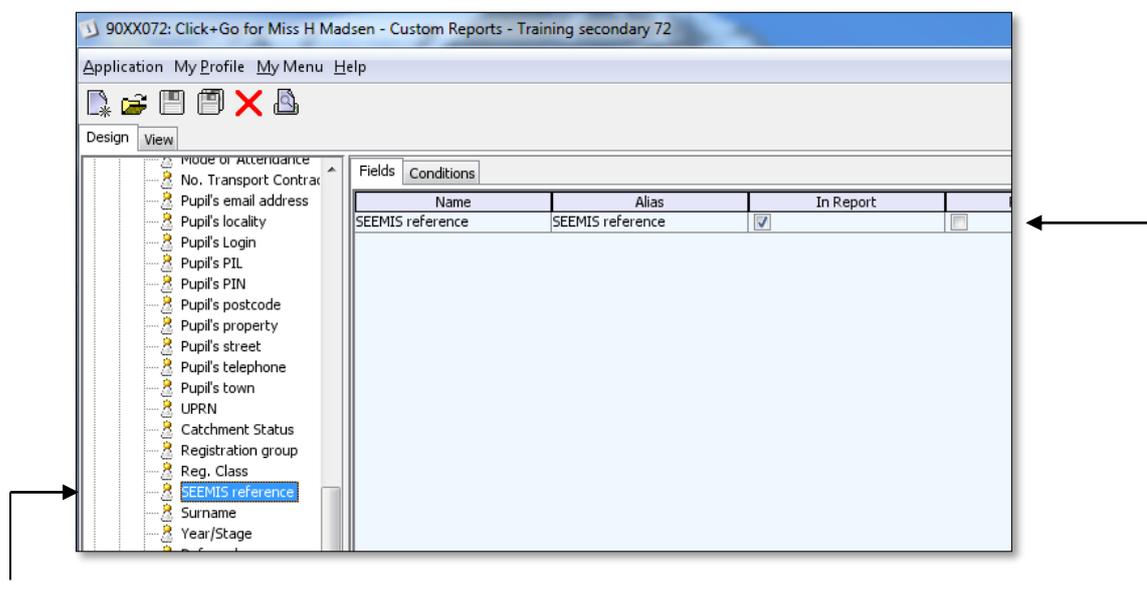
Creating the Contacts Export

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



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: -

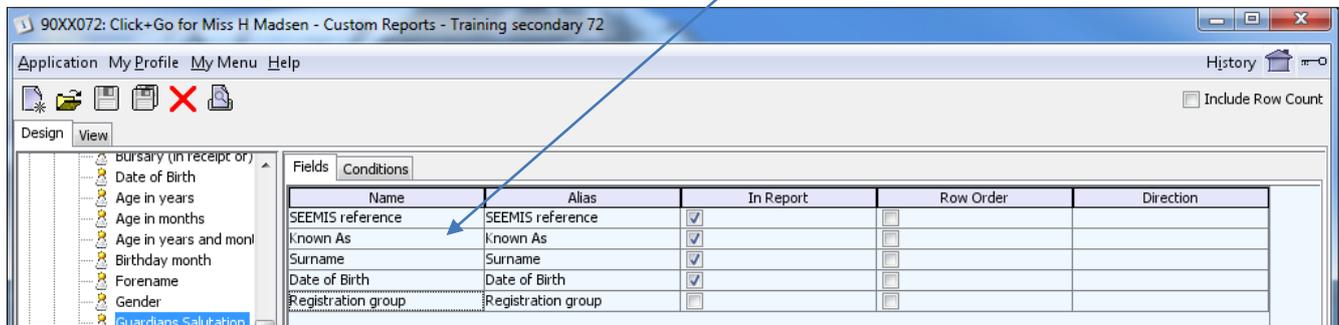
Known As

Surname

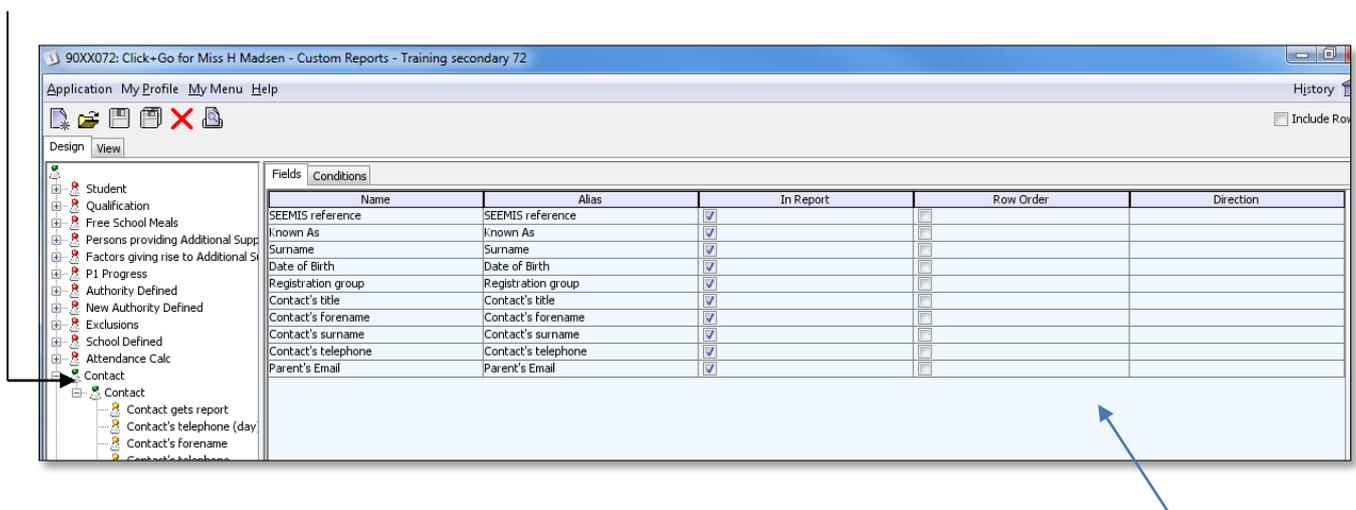
Date of Birth

Registration Group

These fields should appear on the right-hand side of the screen as shown below.



Now, on the left-hand side of the screen, scroll down to the **Contact** folder. Click on the + sign to open the folder and then click on the + sign in the **Contact** folder that appears below.



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

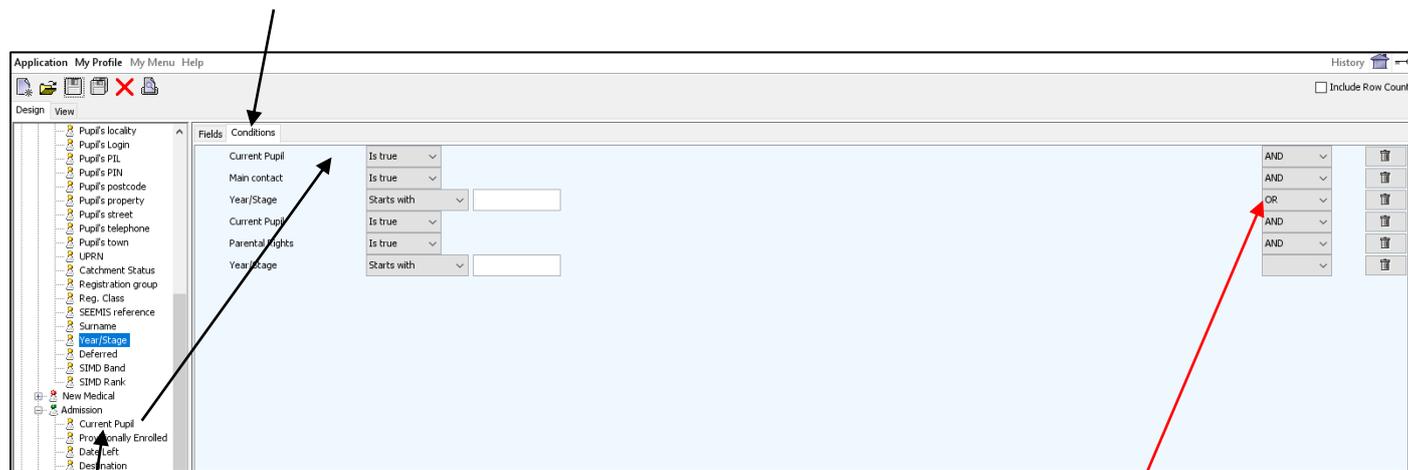
Next: Decide whether you want to import both parents (the 'Main Contact' and 'Parental Rights' contacts) or only 1 parent/guardian for each student (the 'Main Contact' in SEEMIS). We recommend uploading BOTH.

- To import both parent/guardians, continue to page 4
- To import only one Parent/Guardian, skip page 4 and move to page 5

We recommend uploading a Mum and Dad wherever possible, e.g. Main Contact and 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

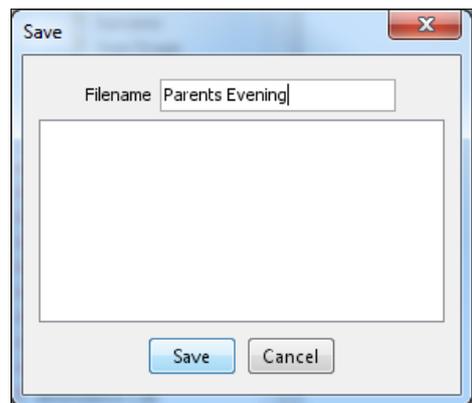
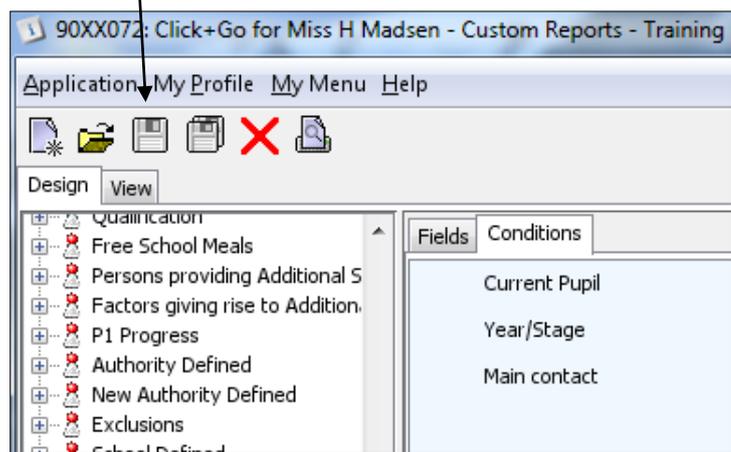


On the left-hand side of the screen, in this very specific order, find the below conditions in their respective 'sections' and drag them over to the conditions (blue) area...

- 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.

Next click on the floppy disk icon to save the custom report...



Name the report **Parents Evening** and then click on **Save**.

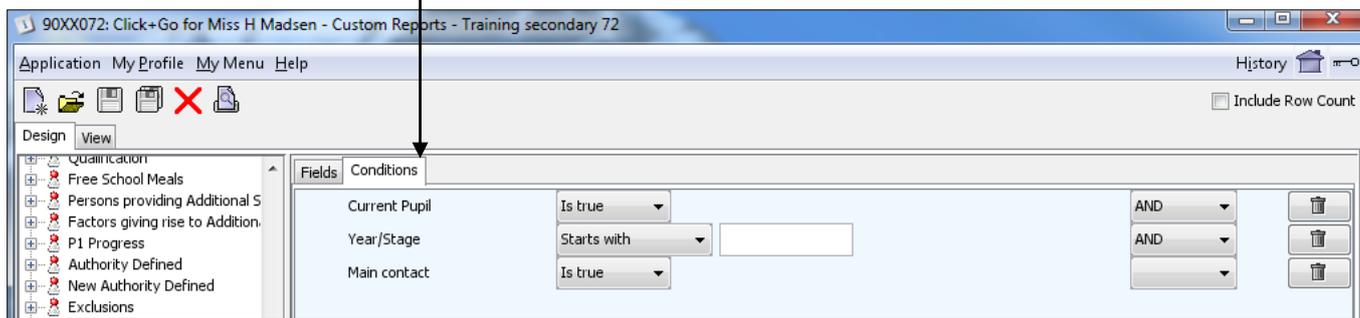
Do not add a ' to the name (i.e. Parents' Evening).

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

Tip: If you want to only 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:

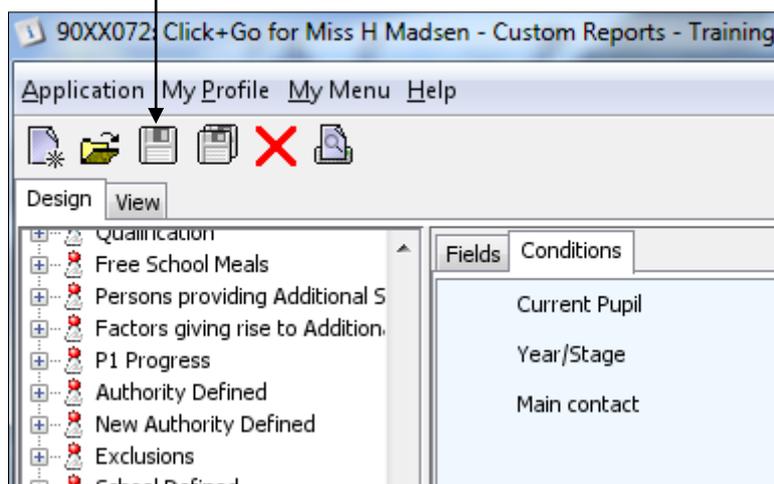
Click on the **Conditions** tab



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.

Click on the floppy disk icon  to save the custom report.



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

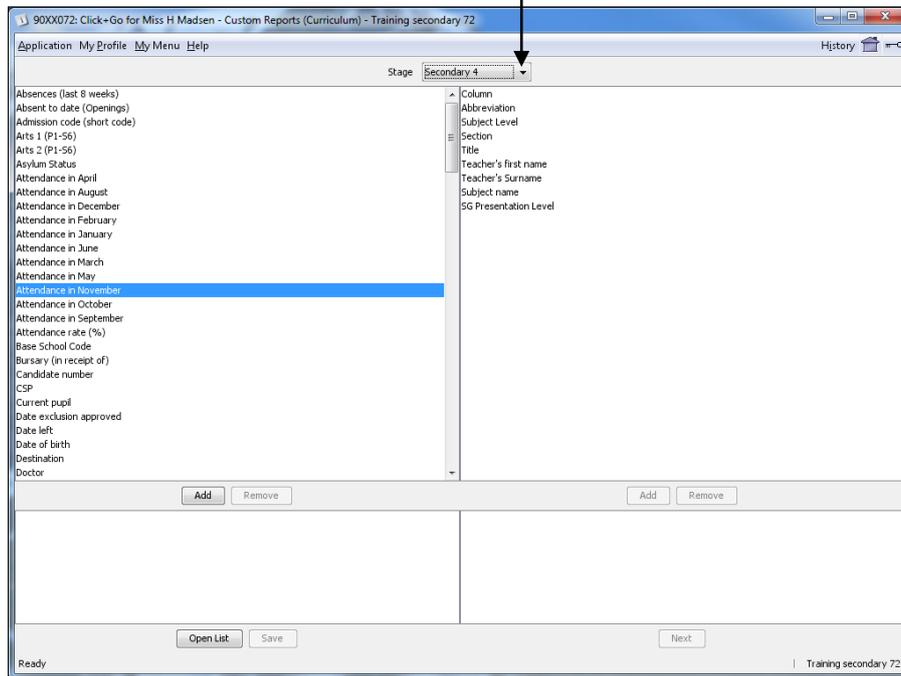


Now skip to page 6 to create your 'Curriculum' custom report

Creating the Curriculum/Teacher Export

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)



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

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

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

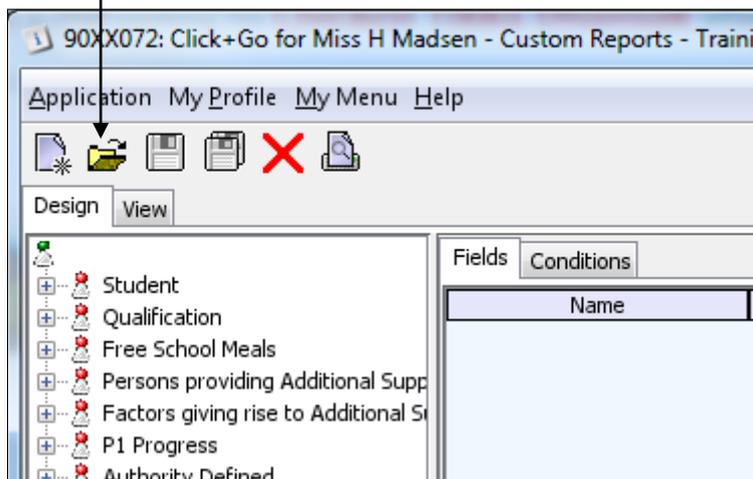
Parents Evening

Save Cancel

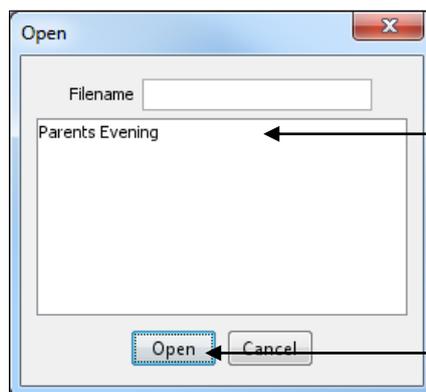
Exporting the Contact information

Go to **Application > Reports > Custom Reports**

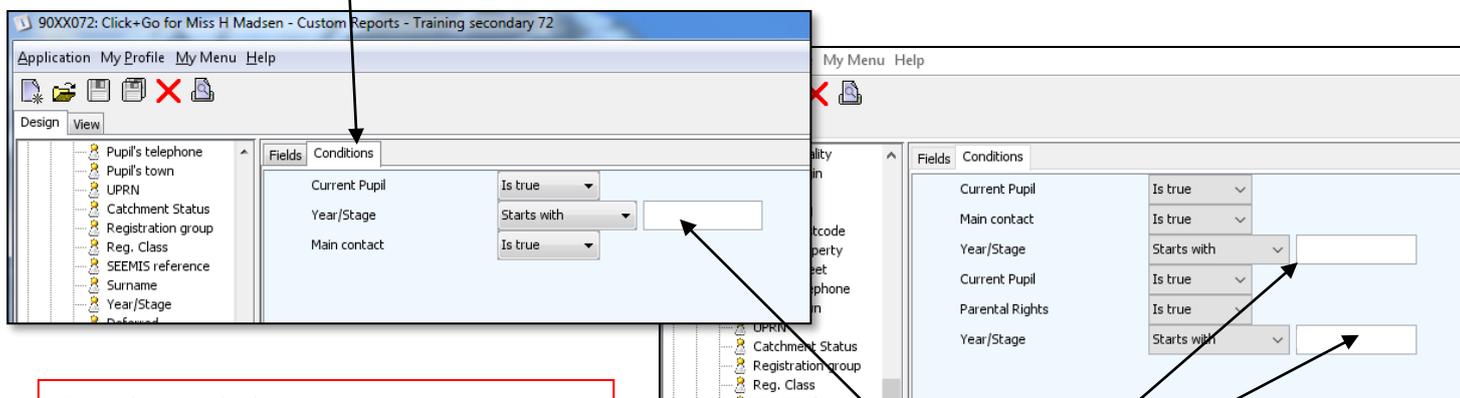
Click on the yellow folder icon 



From the list of reports that appears, select the **Parents Evening** report and then click on **Open**



Click on the conditions tab

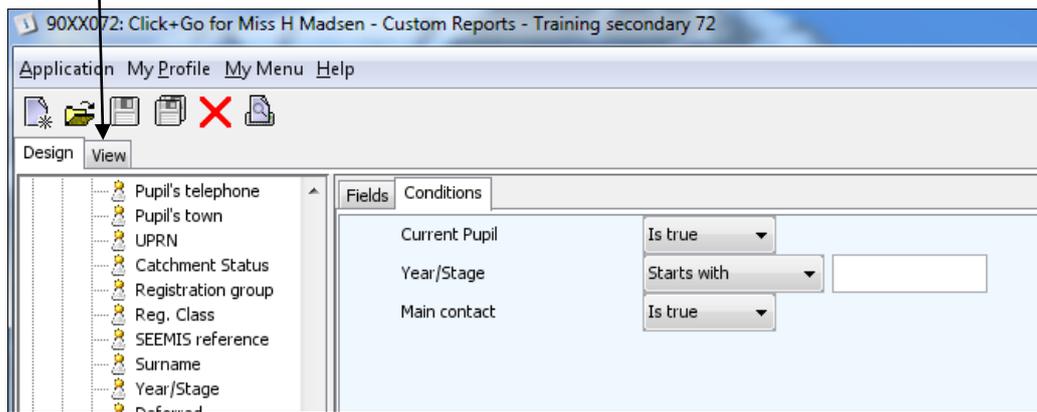


Depending on whether you are extracting 1x parent or 2x, the Conditions tab will look like one of the above.

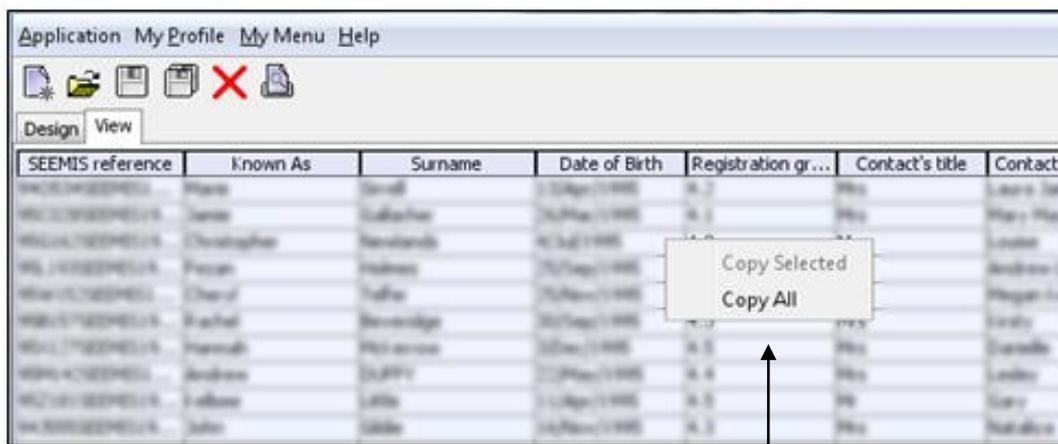
Leave the Year/Stage field blank to extract the whole school. This will be easier than extracting certain year groups. Later you can decide to delete, or not include, certain register classes and year groups in your parents' evening.

Exporting the Contact Information

Click on the **View** tab

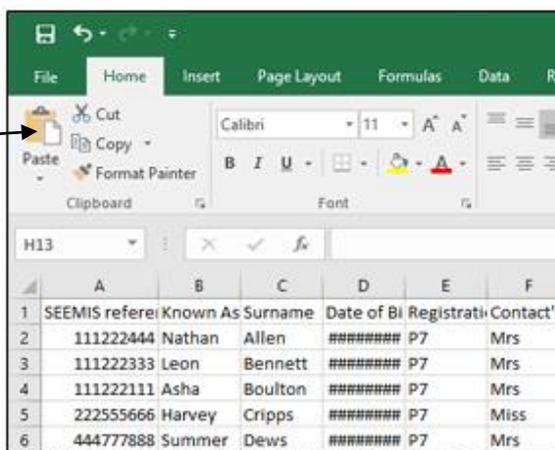


The information to be exported will be displayed as shown below:

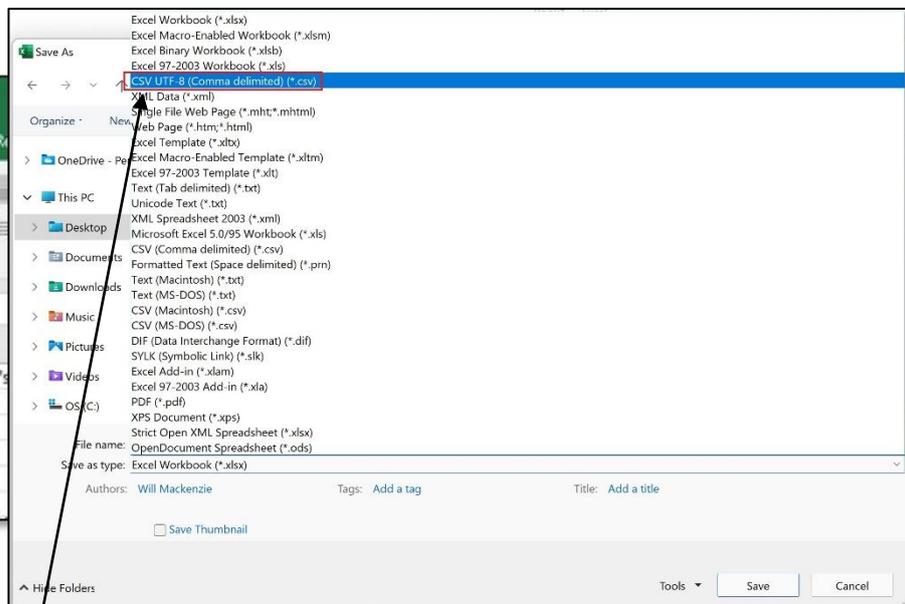


Right click anywhere on the list and then left click on **Copy All**

Open a blank workbook in Excel:



Click on the **Paste** button



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

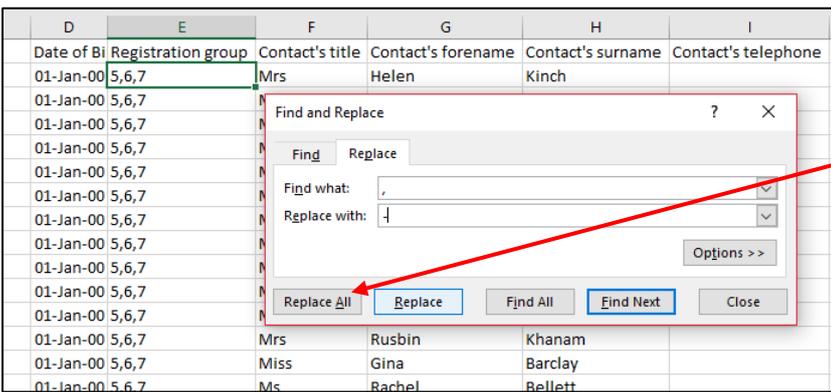
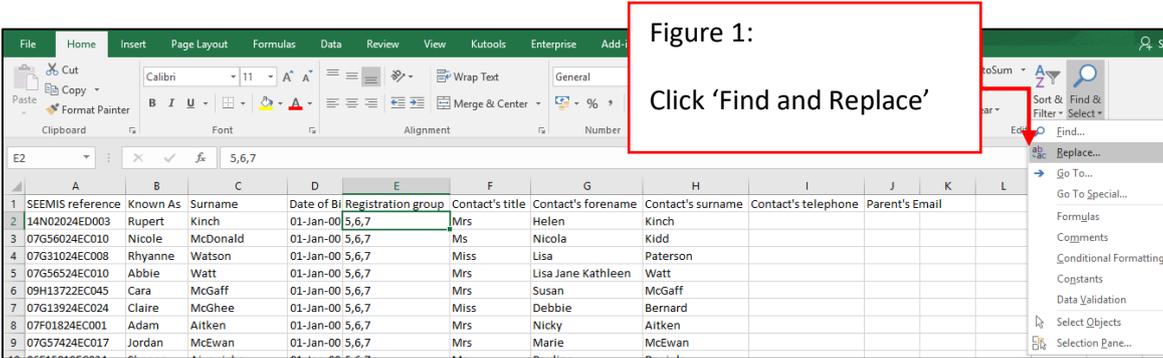
Save the spreadsheet as a **CSV (Comma delimited)**, (ideally the CSV UTF-8 if your Excel has this option) e.g. "March Parents Evening Contacts 2022"

Optional: Changes to consider making to your Contacts file

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 2nd 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:



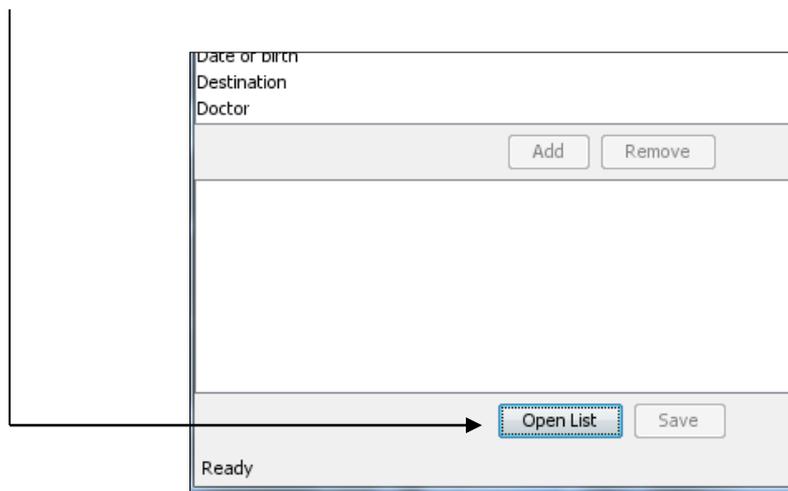
Remember to save your spreadsheet now that you have made these changes.

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

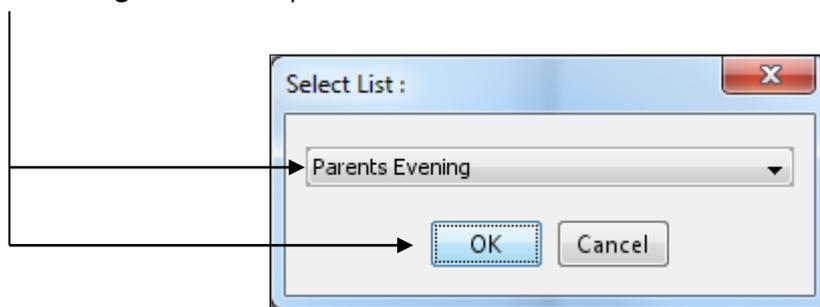
Exporting the Curricular Information

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

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

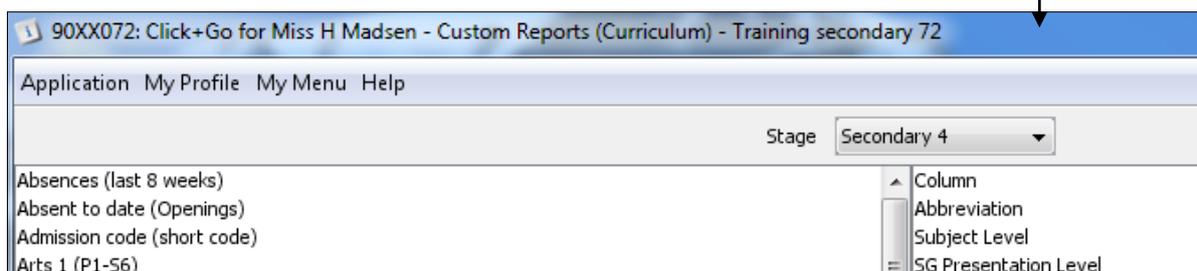


Select **Parents Evening** from the drop down list and then click on **OK**

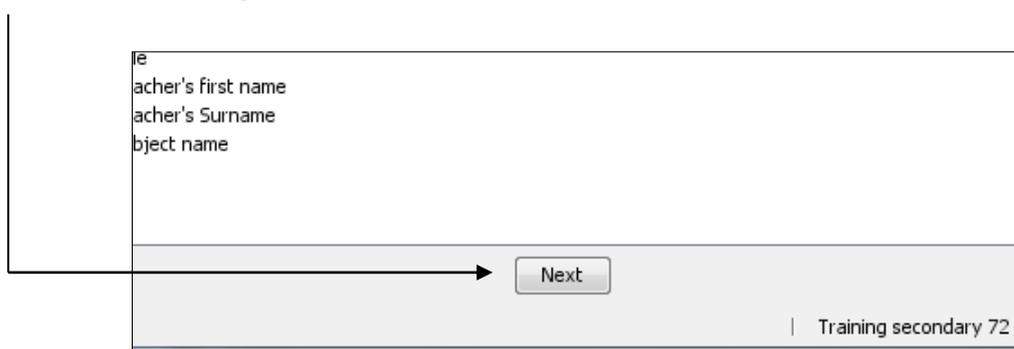


Select the appropriate **Stage** from the drop down list (i.e. Primary 1)

If you are exporting multiple years, begin with one and we will export all of the others separately later.
Also please note that it is rare that Nursery classes are in SEEMIS. These can be added later.

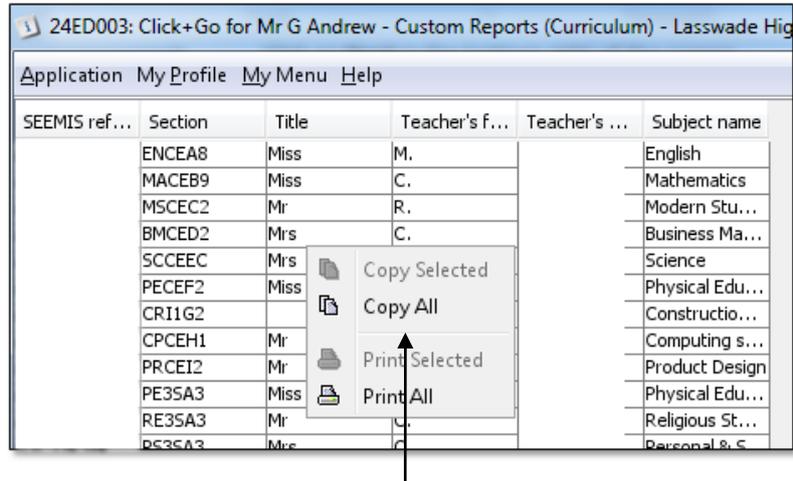


Click on **Next** in the bottom right of the screen



Exporting the Curricular Information

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

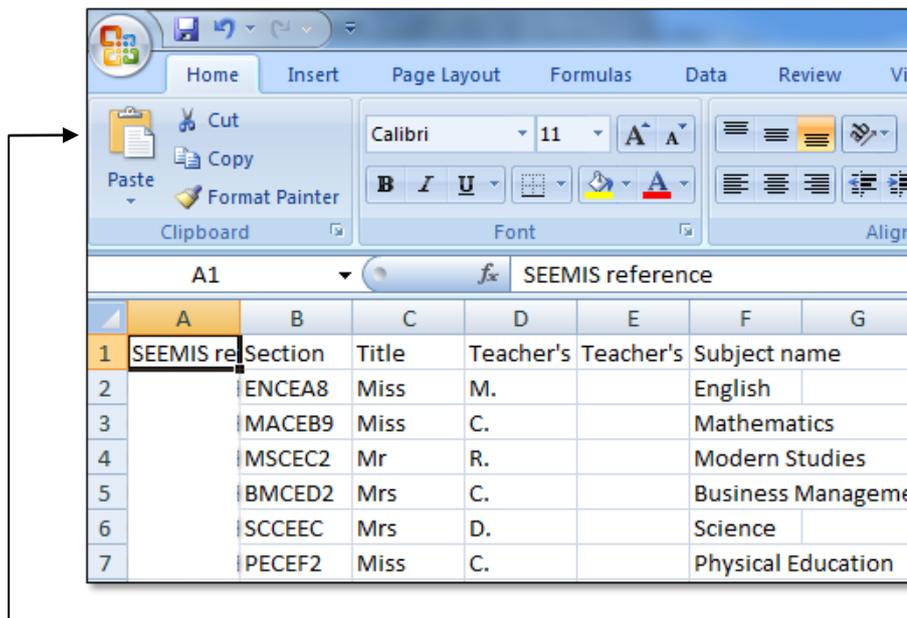


The screenshot shows a window titled "24ED003: Click+Go for Mr G Andrew - Custom Reports (Curriculum) - Lasswade Hig". The window contains a table with the following columns: SEEMIS ref..., Section, Title, Teacher's f..., Teacher's ..., and Subject name. The table lists several teachers and their subjects. A context menu is open over the table, showing options: Copy Selected, Copy All, Print Selected, and Print All. An arrow points from the text below to the "Copy All" option.

SEEMIS ref...	Section	Title	Teacher's f...	Teacher's ...	Subject name
	ENCEA8	Miss	M.		English
	MACEB9	Miss	C.		Mathematics
	MSCEC2	Mr	R.		Modern Stu...
	BMCED2	Mrs	C.		Business Ma...
	SCCEEC	Mrs			Science
	PECEF2	Miss			Physical Edu...
	CRI1G2				Constructio...
	CPCEH1	Mr			Computing s...
	PRCEI2	Mr			Product Design
	PE3SA3	Miss			Physical Edu...
	RE3SA3	Mr			Religious St...
	PE3SA3	Mrs			Personal & S...

Right click anywhere on the screen and then **left click on Copy all**

Open a blank workbook in Excel



The screenshot shows the Microsoft Excel interface. The 'Home' ribbon is active, and the 'Paste' button is highlighted. Below the ribbon, a spreadsheet is visible with the following data:

	A1	SEEMIS reference					
	A	B	C	D	E	F	G
1	SEEMIS ref	Section	Title	Teacher's	Teacher's	Subject name	
2		ENCEA8	Miss	M.		English	
3		MACEB9	Miss	C.		Mathematics	
4		MSCEC2	Mr	R.		Modern Studies	
5		BMCED2	Mrs	C.		Business Management	
6		SCCEEC	Mrs	D.		Science	
7		PECEF2	Miss	C.		Physical Education	

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

IMPORTANT – repeat these steps for all year groups: 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 **the same spreadsheet**. 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 Curriculum 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 Contacts and ONE for your Curriculum.
2. 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 Contacts 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. [a@a.com](#) or [b@b.com](#)). 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 (www.parents-booking.co.uk) and login as an Admin, then go to the 'Upload Data' tab.
 - Go down to the 'Add CSV File' button and upload the Contacts .csv file first
 - When the Parent Contacts file has uploaded 100%, upload the Curriculum .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/>