Parents Booking

Exporting secondary 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 8-13.

Contents

Section 1: First Time Set Up

> 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

Section 3: Optional Extra Advice

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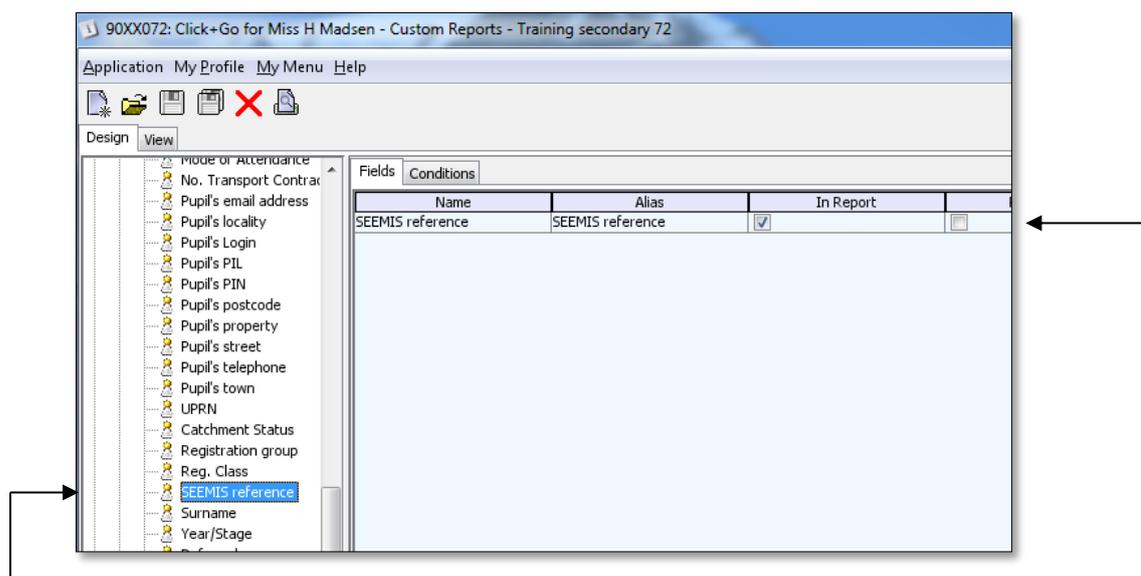
In the list that appears under **Student**, find **SEEMIS Reference** and then click and drag the field over to the empty space on the right hand side of the screen.

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.
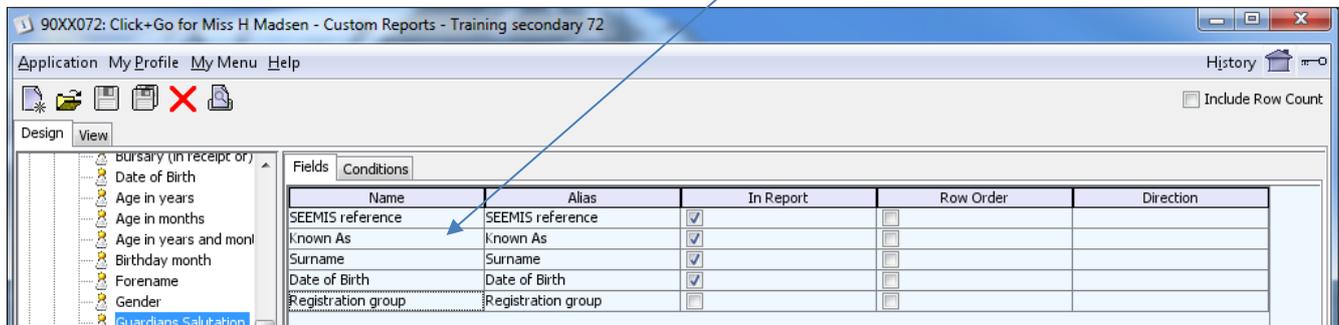
Now, on the left-hand side of the screen, scroll down to the **Contact** folder. Click on the **+** sign to open the folder and then click on the **+** sign in the **Contact** folder that appears below.
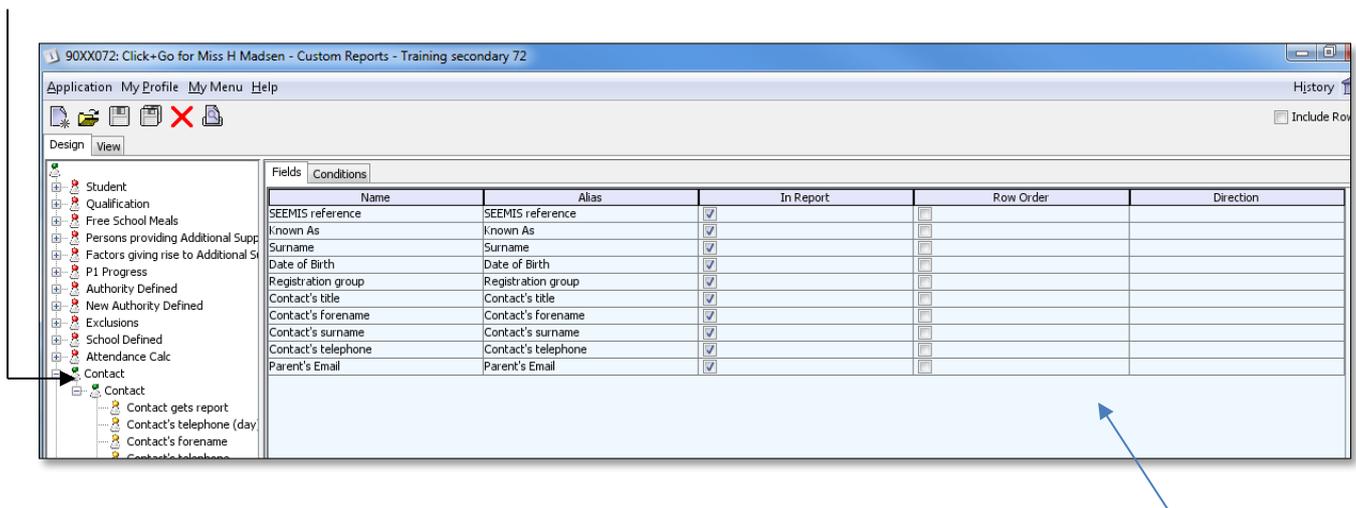
Click and drag the below fields onto the right hand side of the screen. Once completed, the screen should look the same as above.

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 <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.

Next click on the floppy disk icon to save the custom report…
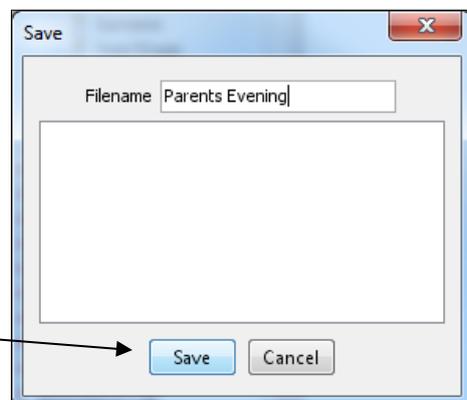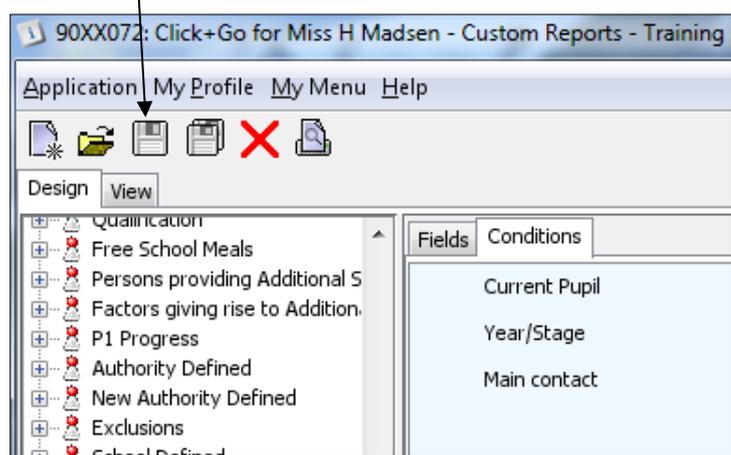
Name the report **Parents Evening** and then click on **Save.**
Do not add a ' to the name (i.e. Parents' Evening).

Now skip 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 (parent/guardian) Contact' from SEEMIS for each pupil:

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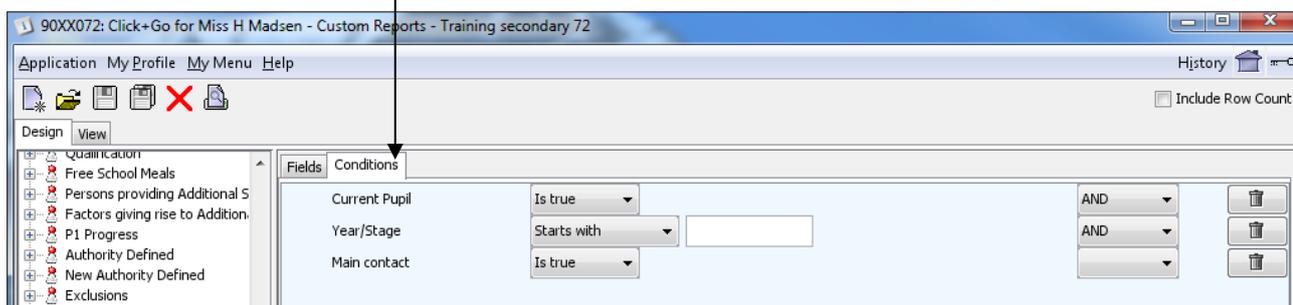
On the left-hand side of the screen, scroll back up to the **Student** folder and then drag over **Year / Stage.**
Scroll back down to the **Contact** folder and then drag over **Main Contact.**

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

Click on the floppy disk icon ⬛ to save the custom report.
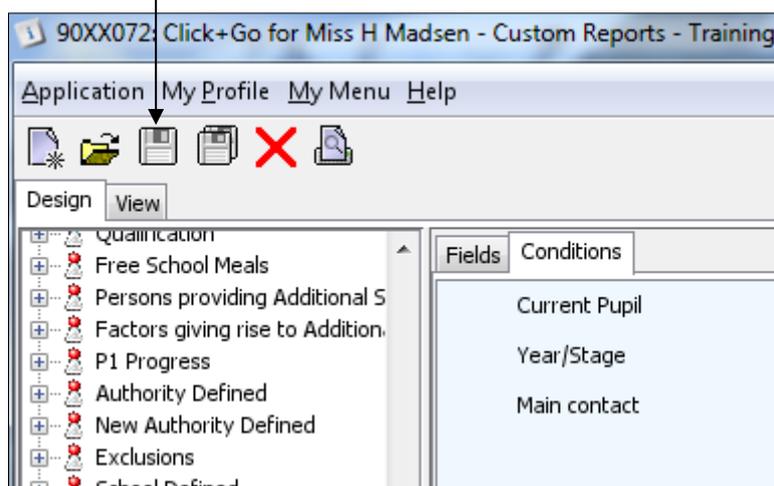
Name the report **Parents Evening** and then click on **Save.** *Do not add a ' to the name (i.e. Parents' Evening).*
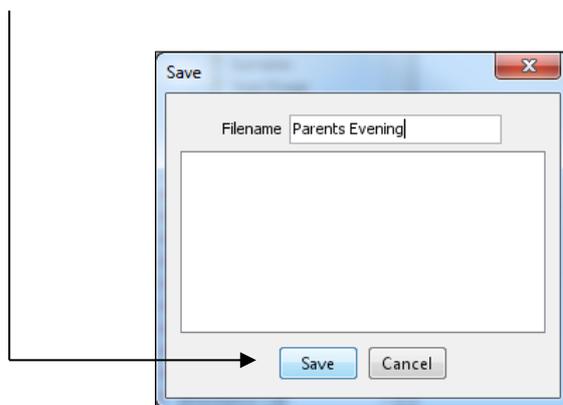
<div style="border:2px solid red; text-align:center; color:red; font-weight:bold">
Now skip to page 6 to create your 'Curriculum' custom report
</div>

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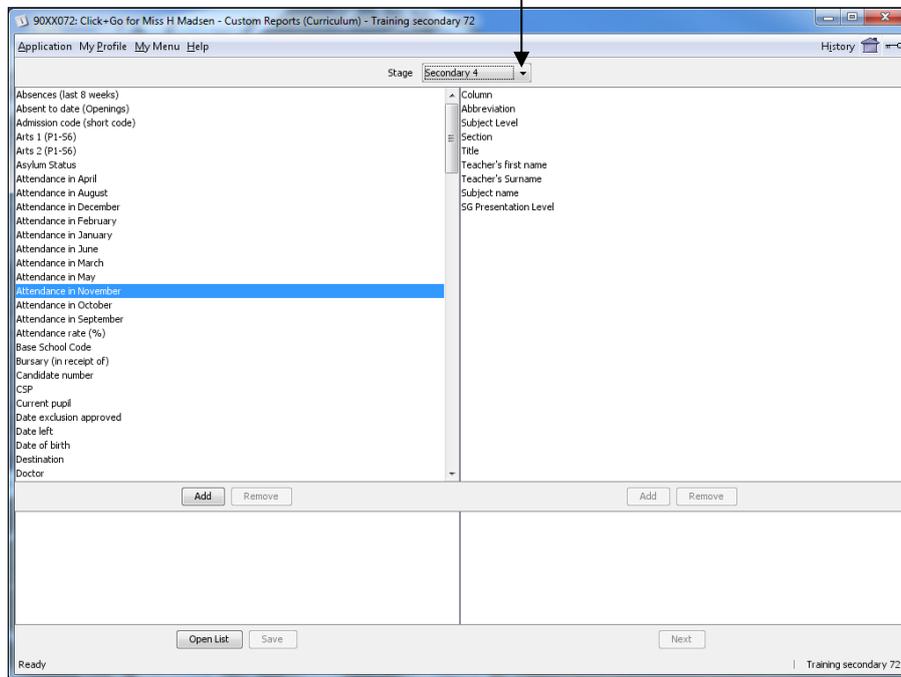
On the **left** hand side of the screen, double click on the following field:-

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

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

Click on **Save**

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

N.B. Do not add a ' to the name (i.e. Parents' Evening) or the report will not save

Exporting the Contact information

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

Click on the yellow folder icon
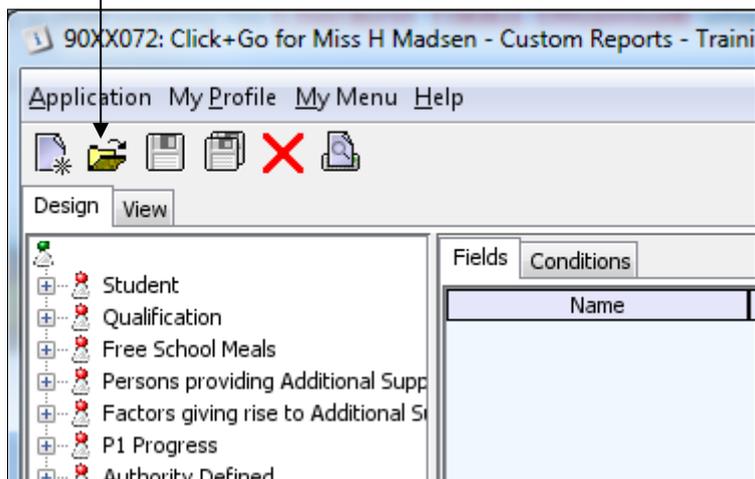
From the list of reports that appears, select the **Parents Evening** report and then click on **Open**
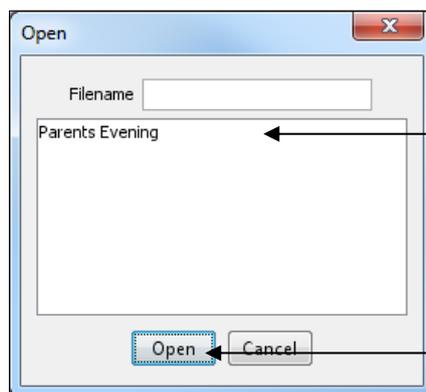
Click on the conditions tab
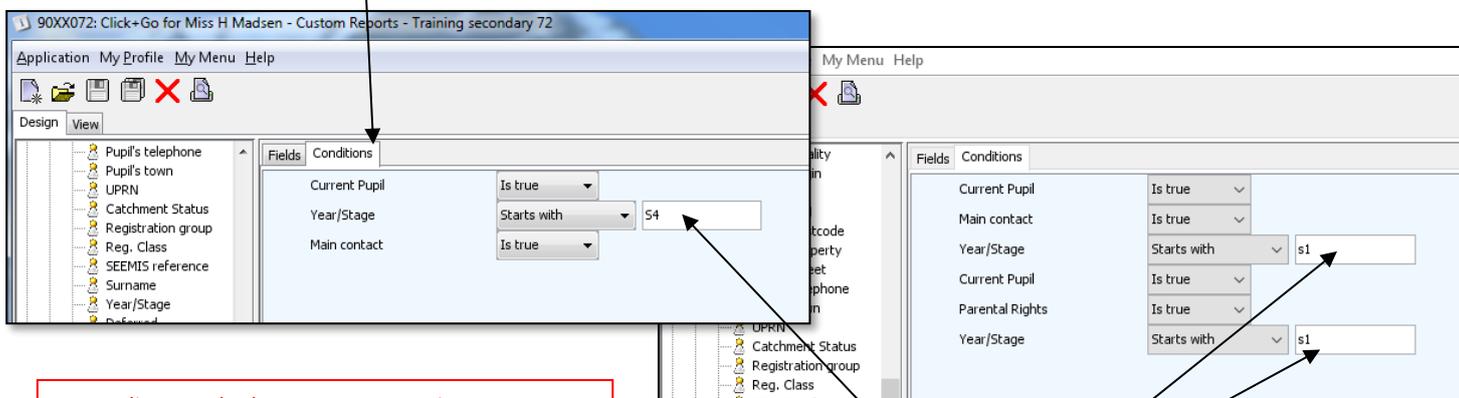
Depending on whether you are extracting 1x parent or 2x, the Conditions tab will look like one of the above.

Extracting the correct year group: Make sure the correct year group is in all of the 'Year Stage' text boxes shown. If you leave these blank the whole school will extract. As an example, you can type in: "S1" or "S4".

Exporting the Contact Information

Click on the **View** tab
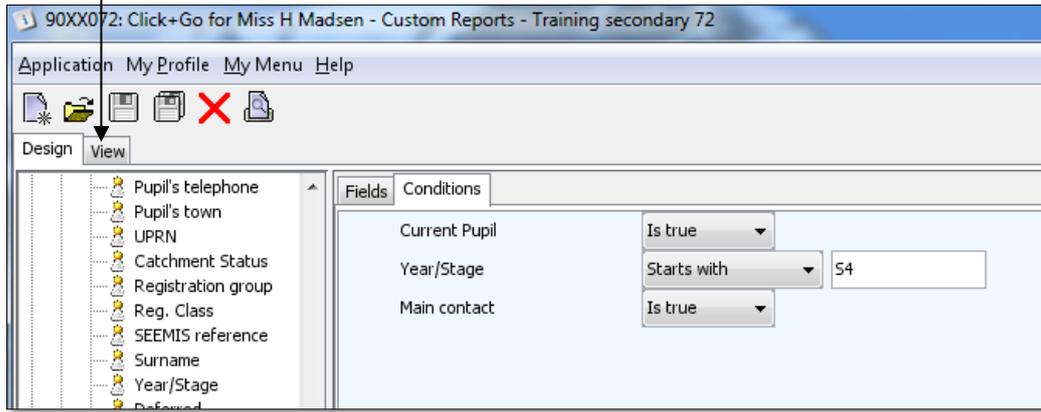
The information to be exported will be displayed as shown below.
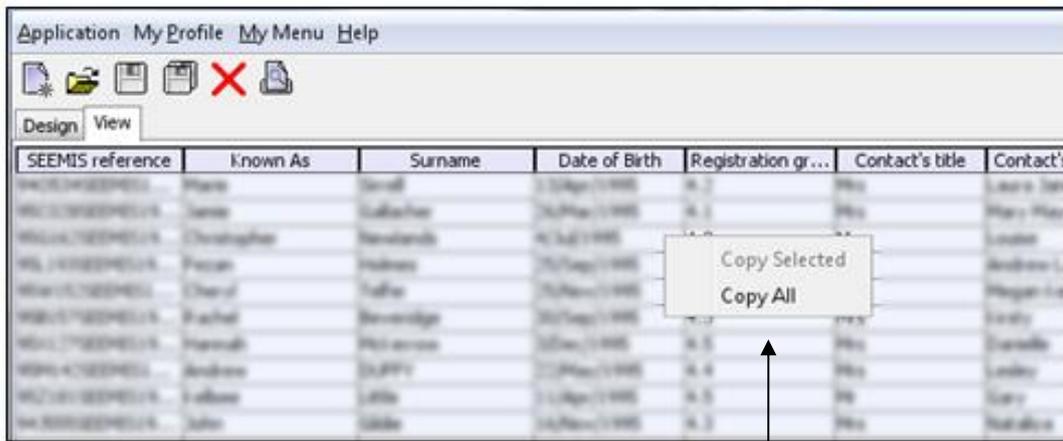
Right click anywhere on the list and then **left click** on **Copy All**

Open a blank workbook in Excel
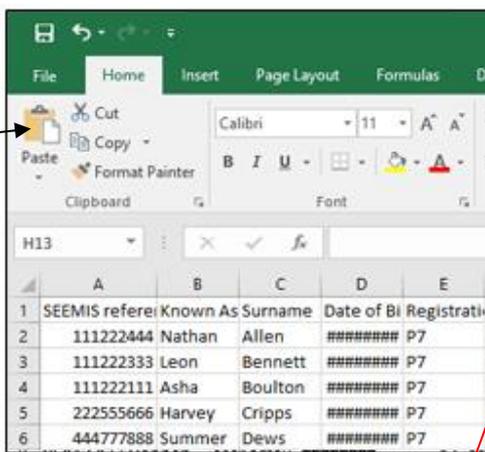
Click on the **Paste** button
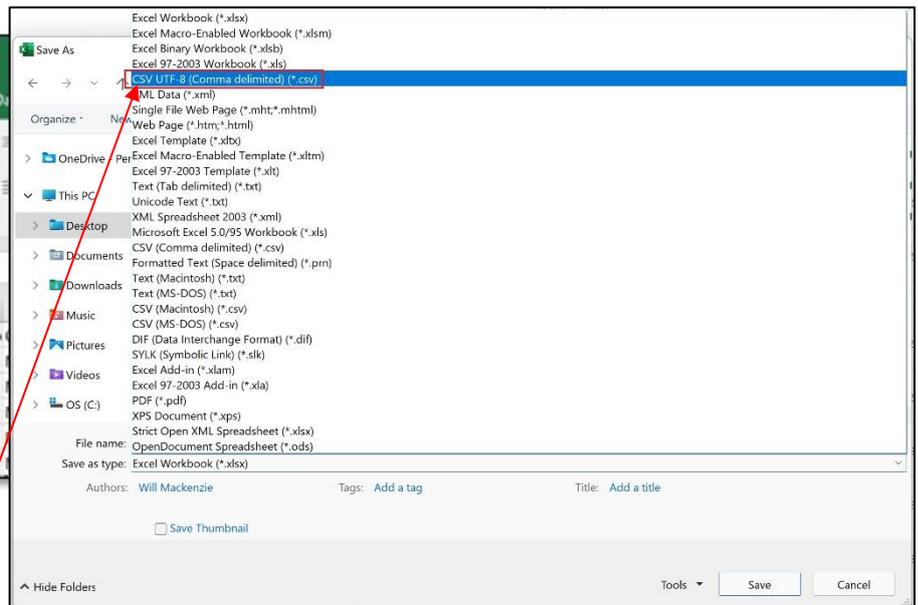
Save the spreadsheet as a **CSV (Comma delimited)** file (ideally the CSV UTF-8 if your Excel has this option), with a suitable name, (e.g. "S4 Parents Evening Contacts 2022").

<div style="border:1px solid red; text-align:center; color:red; font-weight:bold;">
On the following page (page 10) are some tweaks you may
wish to consider, but can probably skip.
</div>

Optional: Changes to consider making to your Contacts file

There will be problems caused later if:

- **Register Classes (Column E) are of a 'vertical' year group format** (e.g. they do not have a year-specific number which shows that the class is related to a year group – 3A, 3B, 3C), because this will make it hard tell each parents' evening which students are meant to be in the event
- Some Register Class cells are blank, because the school has guest/visitor/consortium students on roll
- Some Register Classes have commas in them

You can fix these issues by changing the data in the Register Class column. **Example 1:** Replace vertical year groups with something year-specific (i.e. "Secondary 3" for an S3 data extract – see Figure 1 below); **Example 2:** replace blank cells with 'Consortium'; **Example 3:** Use "Find and Replace" (see figures 2 and 3 below) to replace all commas with a hyphen, perhaps.

Figure 1: Change Vertical Yeargroups

Type the new Register Class name into the first cell, then click the very small box in the bottom right of the cell and this will let you drag the new class name over all other cells in this column. Drag all the way down to replace all old Register Classes.

Figure 2: If you have commas in Reg Classes

Commas in the spreadsheets cause upload errors.

Click 'Find and Replace'.

Figure 3: Find and Replace Commas

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. Saving is explained on Page 9.

Optional: Before Exporting the Curricular Information

Before you extract your Curriculum spreadsheet, consider pressing the button in SEEMIS explained below, which will make sure that the timetable/curriculum data to be extracted is the most up-to-date timetable data available. This could save you having to make lots of changes to your class/teacher data later.

In SEEMIS go to:

Application > Data Utilities > Access Control > Add Current Classes – All Staff

On the page that is shown (see below) click on the "**Add Current Classes – All Staff**" button.
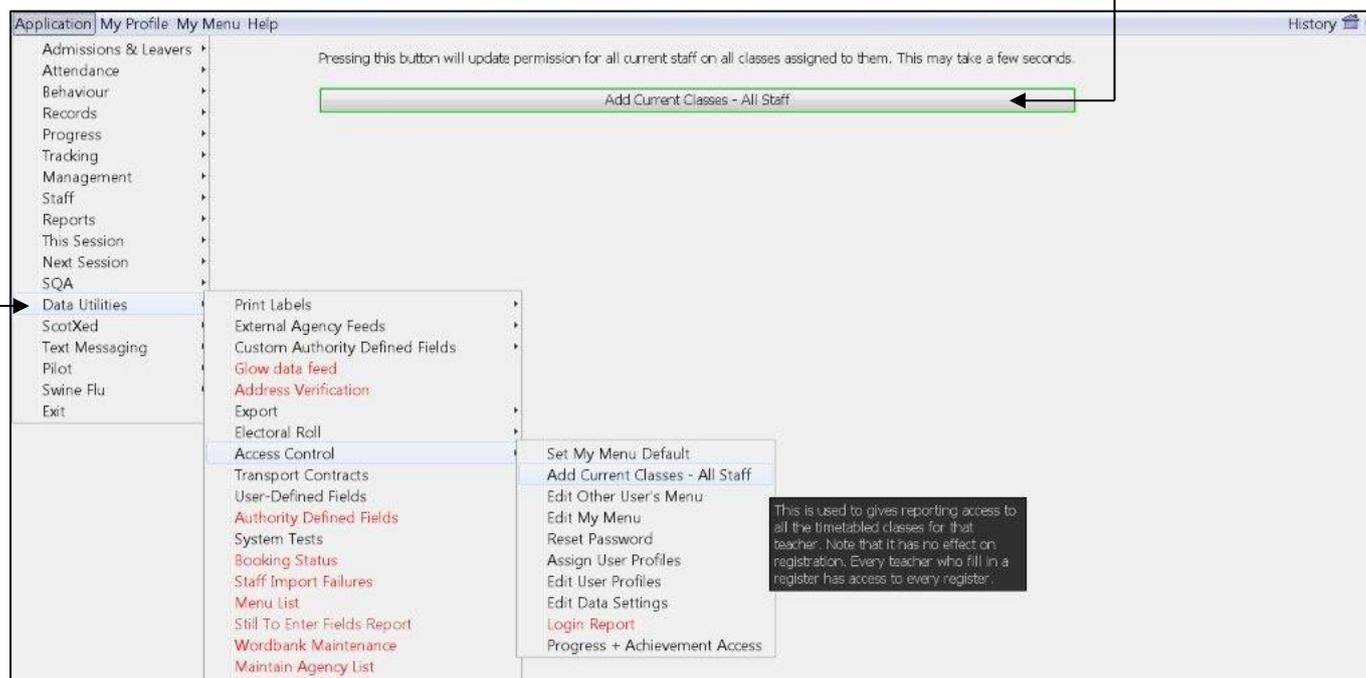
Clicking on this button will update your timetable (which was likely last updated/set up at the start of the academic year) so that, in the next steps, when you extract all of your classes, all of the teachers should be correctly assigned to their correct classes.

This is a big help for schools who:

- Have had teachers join or leave the school
- Have has classes move from one teacher to another
- Have classes which are shared by two teachers (this tool will assign the class to the teacher who teaches the class most)

<div style="border: 2px solid red; padding: 10px; text-align: center; color: red; font-weight: bold;">
Once the above button has been pressed, and the task has finished, you can move directly to the next step, which is to extract your teacher/curriculum data, which is on Page 12.
</div>

Go to **Application > Reports > Custom Reports (Curriculum)**

Click on the **Open List** button in the bottom left corner of the screen
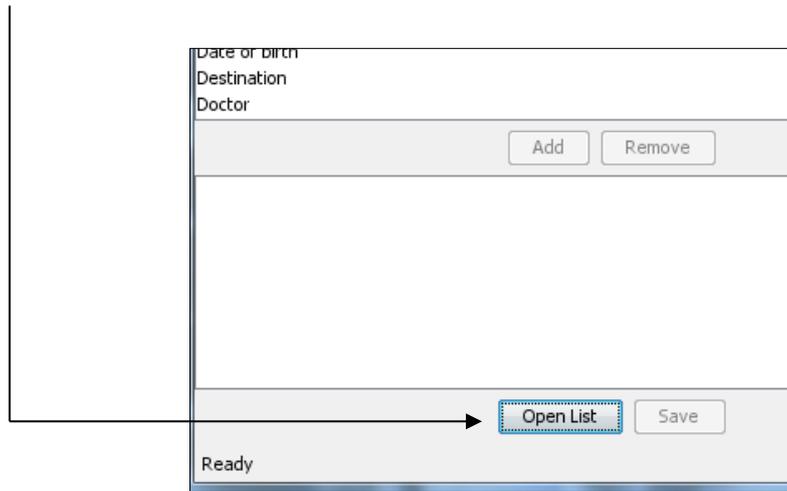
Select **Parents Evening** from the drop down list and then click on **OK**
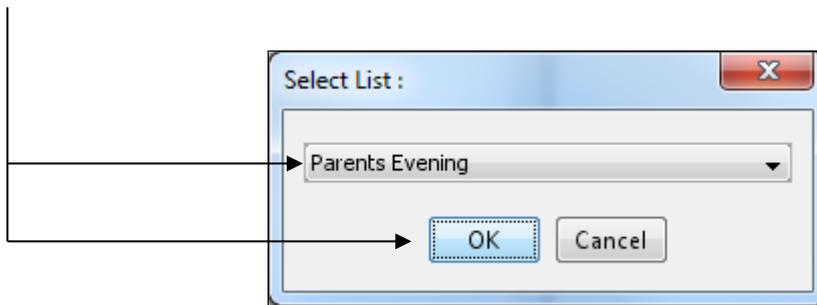
Select the appropriate **Stage** from the drop down list

If you are exporting multiple years, begin with one and export others later by repeating these steps.
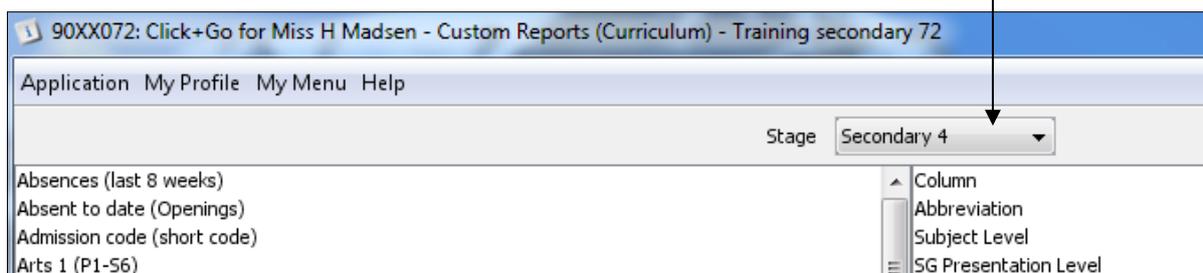
Click on **Next** in the bottom right of the screen

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

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

Open a blank workbook in Excel

Click on the **Paste** button

Save the spreadsheet as a **CSV (Comma delimited),** (ideally the CSV UTF-8 if your Excel has this option) with a suitable name (e.g. "S4 Parents Evening Curriculum 2022").

Optional: **How to edit your spreadsheet of Curriculum/Teacher data before uploading it**

Although you can edit pupil, parent, teacher and class data that you upload inside Parents Booking, sometimes schools want to edit their Curriculum/Teacher spreadsheet before uploading it. You may want to:

- Remove classes/subjects that are not required
- Swap teachers for classes that are incorrectly assigned to the wrong teacher (split/shared classes usually)

If so, here are the instructions:

1.   To make this process easy, let's add a Filter to each column. Click on Row 1 to highlight all column headers, then click on 'Sort and Filter' and then 'Filter' to add a filter to each header. This will help you search for what you are looking for.

2.   If you need to delete a class from the spreadsheet, so that it does not upload, search for the class using the filter on the 'Section' column. Search for the exact class code and the spreadsheet will only show those entries. Highlight and delete all of the rows which are left, to take these out of your spreadsheet.

3.   Change a teacher in the same way. Either search for the class code via the Section column, or the Teacher Surname column, and then replace the teacher's name on all of the entries which need changed. You can copy the replacement teacher and paste the name over all other cells to make this process quick.
N.B. Schools sometimes want to give half of one class to a different teacher, in which case replace the teacher's name with the new teacher for half of the entries provided.

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 too.

Download our **Admin Manual** from here.

Steps required to set up a parents' evening:

1. Follow Pages 8 to 13 of our instructions guide (above) and export the data for the relevant year(s). These steps will leave you with 1x .CSV spreadsheet for your Parent Contacts and 1x .CSV for your Curriculum.

2. Consider the following spreadsheet edits:

   - **Linking twins to the same parent**
     Parents of twins (or parents who have more than one student in the parents' evening event) must have an e-mail address against both their rows, otherwise our system won't be certain this is the same parent. If you Sort the spreadsheet A-Z in the Parent First Name and then the Surname columns, 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.

   - **Schools with vertical year groups (see Page 10)**
     If your school utilises a vertical year group system, we should change the parents/contacts spreadsheet so that you can make events which are specific to the year group you are creating them for. If you do not make this change, our system will not know which years the students are in, meaning that when you set up an event it will not know which students to include and which to exclude.
     Solution: Open your parents/contacts spreadsheet. Locate Column E ("Registration group"). In cell 2 (the first cell below the header "Registration group", input the year group name, e.g. "S4", over the existing cell contents. Now Copy this cell (CTRL + C). Now highlight all of the cells below this cell, all the way down the spreadsheet. Once all cells in this row (except the header "Registration group") are highlighted, Paste (CTRL+V) the year group (e.g. S4) over all cells. This will allow you to input only S4 in the 'Register Classes' box when setting up your event (Step 7 below).

   - **Schools with consortium students (see Page 10)**
     If your school has students without a register class, such as consortium students / guest students / students not linked to a school register class, these students will not upload unless they are given a Register Class (column E). Should you upload students without a Register Class, you will receive an error during the upload.
     To fix this issue (i.e. if you want to upload these students), simply replace these students' blank Register Class (column E) cells with a replacement register class. Perhaps: "Consortium". To do this, add a filter to the 'Register Class' header, then search for only the 'Blank' cells. This will let you then copy and paste the word "Consortium" into the blank cells. These students will not upload properly.

3. If you want to make changes to your Curriculum spreadsheet before you upload it, to remove classes you don't need, or swap teacher assignments, read the instructions on page 14.

4. Once you're satisfied your spreadsheets are correct, go to Parents Booking (www.parents-booking.co.uk) and login as an Admin, then go to 'Upload Data'.
   - Go down to the 'Add CSV File' button and upload the Parent Contacts file first
   - When the Parent Contacts file has uploaded 100%, upload the Curriculum spreadsheet and wait for this to also go to 100%.

5. 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.

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. Press 'Create New Evening' to set up your event. Complete all of the required fields (marked with a *) and then save 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 5 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
   - Use 'Download Class Codes' to download a spreadsheet of all teacher and class assignments in the parents' evening and send this around colleagues to check that all split classes have the correct assignment. Again, make changes on the Teachers tab (Step 5) and then return to this page to press 'Update' and have those changes appear in your event.

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 our template instruction letter for parents, go to https://knowledge.parents-booking.com/support/essential-downloads/