

How to Bulk Update Information

Applicable to SIMS Version

7.104 onwards.

Permissions Required

You will need to be a member of any of the following user groups in System Manager to bulk update information:

Administration Assistant, Admissions Officer, Returns Manager, Returns Operator, School Administrator.

Introduction

The facility to bulk update pupil/student information enables you to simultaneously assign values to a group of pupil/students, and then edit any individual exceptions, if required. For example, you may wish to set the **Emergency Consent** to **Yes** for all pupil/students in a group and then edit the exceptions. It is also a useful function for finding any missing values, such as missing Ethnicity or an invalid Religion code. This can be particularly helpful when preparing for statutory returns, such as the School Census.

The following information can be edited using bulk update:

- Boarder Status
- English Additional Language
- First Language
- Ethnic Data Source
- Ethnicity
- Home Language
- Home Religion
- SEN Status
- Meal Type
- Mode of Travel
- National Identity (Welsh schools)
- Speaks Welsh (Welsh schools)
- SEN Provision Type
- Gifted/Talented Subject

- Birth Certificate Seen
- Emergency Consent.

Choosing the Records to Bulk Update

1. Select **Routines | Student | Bulk Update** to display the **Bulk update Pupil (or Student)** page.

2. In the **Student Population** section, select the required **Group Type** and **Group** from the drop-down lists.

The **Group Type** indicates the type of group with which you wish to work. The **Group** enables you to select the specific group of pupil/students you wish to edit. For example, selecting a **Group Type** of **Year** enables you to select a specific year from the **Group** drop-down list, e.g. **Year 1**.

When searching for missing information, the **Group Type** is usually a field of data, e.g. **Ethnicity**, and the **Group** is a specific value, e.g. **<NONE>**. This selection displays any pupil/students who do not currently have an ethnicity recorded against them. This can be particularly useful when preparing data for statutory returns, such as the School Census.

It is also possible to use this functionality to review the data entered for all the pupil/students in the school. This is achieved by selecting **Year Group** from the **Group Type** drop-down list and **<ANY>** from the **Group** drop-down list then selecting the required **Data Item**.

3. To select a group that is no longer in use, click the **Inactive** button. Inactive groups can be identified by an accompanying yellow exclamation mark in the drop-down list.

 *Inactive button*

 *Inactive Icon*

4. The **Effective Date** is the date on which the group is based and defaults to today's date, e.g. the members of **Year 1** today. This can be changed by entering a new date or by clicking the **Calendar** button and selecting a different date.

 *Calendar button*

5. In the **Update Data Item** section, select the required **Data Item** from the drop-down list. This is the item of data that you wish to edit for the selected group of pupil/students. In the previous example, **Emergency Consent** has been selected.

6. The **Effective Date** is the date from which the data item will be changed and defaults to today's date. For example, setting the date to **01/01/09** means that the data item will be updated from that date onwards. Enter a different date, if required, or click the **Calendar** button and select a different date.

In some circumstances, it may be useful to edit the **Effective Date**. For example, there may be occasions when data needs to be historically edited for the purpose of statutory returns, such as the School Census.

7. Click the **Search** button to display a list of pupil/students matching the selected criteria, e.g. all pupil/students in **Year 1**.

The browser may automatically minimise (if you have applied this setting in **Tools | Setups | User Options**) to increase the available screen space (click the **Browser** button to display the browser if required). Members of the selected group are displayed, together with the columns of data that can be edited.

Name	Year Group	Assigned	Yes	No
Amiel, Tanzeel	1	No		✓
Araujo, Hitesh	1	No		✓
Basra, Jill	1	No		✓
Bland, Rod	1	No		✓
Boman, Chloe	1	No		✓
Buckley, Helena	1	No		✓
Burlison, Angus	1	No		✓
Burnside, Francesca	1	No		✓

The total number of records returned is listed at the bottom of the page. The totals are adjusted as the bulk edits are made.

Total	56		56	0	56
--------------	----	--	----	---	----

TIP: This functionality can also be useful for finding records with missing information. For example, to find records where Ethnicity is missing, select **Ethnicity** as the **Group Type**, **<None>** as the **Group** and **Ethnicity** as the **Data Item**. The missing information can then be entered.

Bulk Editing the Data

1. Right-click the heading of a data entry column (white background) and select **Check All** from the pop-up menu to populate the column with ticks. Alternatively, select **UnCheck All** to remove all the ticks from the column. The read-only **Assigned** column displays the selected choice.

Name	Year Group	Assigned	Yes	No
Amiel, Tanzeel	1	No		
Araujo, Hitesh	1	No		
Basra, Jill	1	No		
Bland, Rod	1	No		✓
Boman, Chloe	1	No		✓
Buckley, Helena	1	No		✓
Burlison, Angus	1	No		✓

2. Click in the cell of a specific pupil/student to change an individual value, as shown in the following graphic.

Name	Year Group	Assigned	Yes	No
Amiel, Tanzeel	1	Yes	✓	
Araujo, Hitesh	1	Yes	✓	
Basra, Jill	1	No		✓
Bland, Rod	1	Yes	✓	
Boman, Chloe	1	Yes	✓	
Buckley, Helena	1	No		✓
Burlison, Angus	1	Yes	✓	

3. Any changes can be undone by clicking the **Undo** button, which returns the data to its original state.



Undo button

4. Once you have made all the required changes, click the **Save** button to bulk update the records.

Tips

- Right-click the heading of a data entry column (white background) and select **Narrow Columns** to reduce the width of the columns. Repeat this process to revert to the original display.
- Right-click the heading of any read-only column (grey background) and select any additional columns you wish to display from the pop-up menu, e.g. **DOB**, **AdNo**, **Gender**, etc.
- Click any column heading to order the data by that column.
- Assign values to multiple pupil/students in the group using any of the following methods:
 - Hold down the **Ctrl** key and click the row of each required pupil/student to highlight them. Release the **Ctrl** key then click in the required column to add a tick to the selected pupil/student.
 - To enter values for sequentially listed pupil/students, click the first pupil/student, hold down the **Shift** key then click the last required pupil/student in the list (alternatively, hold down the **Shift** key and press the **Down Arrow** key). Release the **Shift** key then click in the required column to add a tick to the selected pupil/students.

More Information

- *Managing Pupil/Students in SIMS* handbook.

All handbooks can be accessed from the **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button and select the required handbook from the **Handbooks** page.

A selection of help sheets is available from the **Documentation Centre** in SIMS which can be accessed by clicking the **Documentation** button on the toolbar, then clicking the **Help Sheets** button. All available help sheets can be obtained from our SupportNet home page (<http://support.capitaes.co.uk>) by clicking the **Documentation** button, then selecting **Help Sheets** from the **Categories** drop-down list.

Training Courses

For information on training courses, please contact your SIMS Support Provider.

Providing Feedback on this Help Sheet

If you have any suggestions or comments about this or any of our other help sheets, please email helpsheets@capita.co.uk.

Help Sheet Revision History

Doc. Version	Change Description	Date
1010-001	Initial Release.	04/07/05
1010-002	Updated to include new visual design.	17/08/05
1010-003	Updated to include primary rather than secondary school graphics.	24/08/05
1010-004	Updated to reflect SIMS new look released with 7.78 plus some general improvements to text.	01/08/06
1010-005	Updated cross references to new handbook location.	03/11/08
1010-006	Help Sheet transferred to the new template.	10/09/09