

# Primary Report Writer user's guide

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# 1 Overview

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*Primary Report Writer* enables teachers in a school to produce pupil reports for parents using the same design and format throughout the school.

As *Primary Report Writer* is web-based software it can be viewed securely from any internet connected PC, Apple Mac or iPad either at home or school.

If an error should arise just contact us by phone or email and in most cases the error can be quickly corrected because the software is controlled from our location.

You don't need any special hardware or software to use *Primary Report Writer* except for internet browsing software (e.g. *Internet Explorer* for Windows operating systems or *Safari* for Apple Mac/iPAD) and Adobe Reader to preview and print your reports. Adobe Reader can be automatically downloaded and installed from within *Primary Report Writer*.

The program has been designed to meet the needs of the whole primary age range.

Guidelines on reporting to parents as presented in the QCA/DCFS document *Assessment and Reporting Arrangements* were used as a reference point in the program design.

The program contains banks of sentence-length statements based on the National Curriculum, P scales, the QCA Schemes of Work for every subject and the Literacy and Numeracy Frameworks. It also contains sample sets of comments (2 or 3 sentences) for pupils at different attainment levels (at, above, below expected level for the year group) for every subject for every year group.

There are also banks of targets for Reading, Writing, Speaking and Listening and Maths sourced from the Literacy and Numeracy Frameworks.

Teachers using *Primary Report Writer* have the choice of using pre-installed statement, comment and target banks, composing their own customised comments, or writing reports "manually". All text, after selection can be edited.

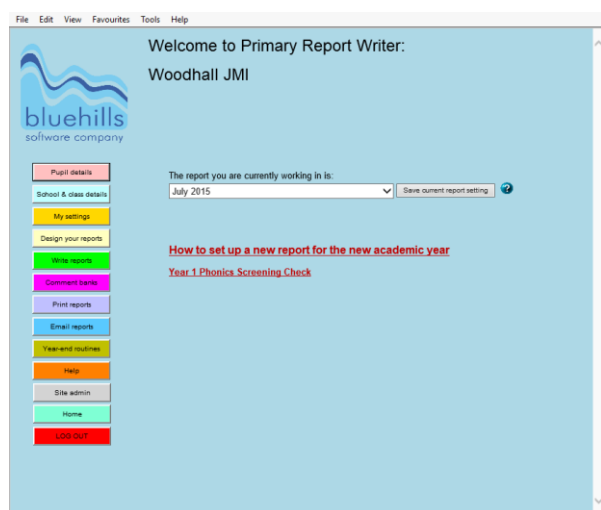
## 2 Logging in and getting started

Open *Primary Report Writer* at: [www.bluehills.co.uk/prw](http://www.bluehills.co.uk/prw)

After logging-in, if you are the very first person at your school to log in, you will be asked to set up a new report by month and year.

You will now see the “Welcome” screen.

On the left of “Welcome” screen is a menu bar that will comprise 7 or 12 buttons. If your school has chosen to restrict access to administrative pages then you may only see 7 buttons, otherwise, as an administrator, you will see 12 buttons.



Admin. menu



Teacher menu

**This menu bar comprises the following buttons:** (buttons that are restricted to the administrator login are marked as “Admin”):

1. **Pupil details (Admin.)** The pupil details include name, gender, year group, UPN, attendance and class. All pupil details, except class, can be imported from your school’s administrative system.
2. **School & class details (Admin.)** Details of the school (including school logo) and class(es) can be entered on this page. On this page, you can also begin and name a new report (e.g. “Summer 2017”)
3. **My settings.** Here you can select only your own pupils to view throughout the program. You can also choose to view the built-in comment banks when writing reports. These settings can be saved for the machine you are working on.
4. **Design your reports (Admin.)** Choose your school’s subject report order, subject headings, optional subjects and report formatting.
5. **Write pupil reports.** Write reports using NC/QCA statement banks, sample comments, your own customised comments or write reports “manually”. All text can be edited.
6. **Comment banks.** View, edit or write customised comments for Progress reports or Targets for individual subjects. There is access to large banks of National Curriculum and QCA statements and sample sets of comments. The comment banks are available for use when writing your reports.

7. **Print reports.** Enter this section of the program in order to see what the final report looks like for any or all of your pupils and also to print your reports.
8. **Email Reports.** Options and settings that allow you to email pupil reports to parents/carers.
9. **Year-end routines (Admin.)** Quickly update year groups or classes for multiple pupils for example at the beginning of each year.
10. **Help.** Read the manual or email Blue Hills for support.
11. **Site admin (Admin)** Change your school's User or Admin password and contact details. Spell-check dictionary options: UK or US English.
12. **Home.** Always takes you back to the "Welcome" page.
13. **Log out.** To stay connected to *Primary Report Writer* but prevent unauthorised viewing of the program or log back in with the administrator's password.

## Saving your work

Generally, if you make manual changes to any text there will be a "Save" button which must be clicked to save your changes. If you select a comment from a comment bank by using the "drop-down" lists, then this will be saved automatically.

In the unlikely event of two teachers working on exactly the same pupil and exactly the same subject at the same time, changes will be accepted from the first teacher to click the "Save" button. When the second teacher clicks "Save", a message will be shown warning that somebody else has made changes to the report since that report was first loaded onto the page; the second teacher's changes will not be saved and the subject report will be reloaded showing the changes made by the first teacher.

## Spell-checking your work

Spellings can be checked in the report-writing pages each time you write a subject report but you can also spell-check a pupil's entire report in one go in the "Quick edit" screen which is accessed from the report-writing pages for progress or targets. When a report is first started for a pupil, that pupil's first name is automatically added to the spellchecker dictionary. You can choose from dictionary options (UK or US English) in Site Admin page.

## 3 Statement banks

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Both statement banks for Progress reporting and Targets comprise two elements:

- a library of statements based on the National Curriculum, P scales, QCA, Literacy and Numeracy Framework.
- customised comment banks that can be built using the library of statements or simply entered "manually".

You do not have to use customised comment banks for report-writing; your progress reports and targets can all be written directly into the report-writing areas without reference to the comment banks but by using comment banks you ensure more consistent reporting and in the long term save a lot of time.

## Progress statement bank

The Progress statement bank holds your customised comments for pupil progress that can be applied to reports when you write them.

It also holds a bank of National Curriculum and QCA statements that can be used to build sets of comments pertinent to your school and pupils.

## Target statement bank

The Target statement bank holds your customised sets of targets for each subject that can be applied to reports when you write them. You only need to use these if you wish to report targets for individual subjects for parents. You may only wish to report targets for Literacy and Numeracy in which case the target banks for all the other subjects can be ignored.

There are pre-installed banks of Targets for Reading, Writing, Speaking and Listening and Maths based on the Literacy, Numeracy and Primary Strategies that can be used to build your own sets of targets.

If you decide not to report targets for individual subjects, you have the option of reporting overall targets for a pupil. This is available as a “subject” called “Individual Targets” in the Progress report-writing area.

## Adding new comments or amending built-in comments for Progress and Targets

On the menu, click “Comment Banks”. The following description is for the Progress comment banks but can also be applied to the Target statement banks also.

Click on the required subject.

When you first open a subject’s comment bank, you will see a sample set of pre-installed comments. You cannot edit or delete the pre-installed comments (categories ending with “...PRW”). You can however “clone” any comment, including the pre-installed comments in order to make a duplicate that can then be edited and saved.

To add new comments of your own, click the “Add new comment” button. You can choose to show or hide the sample comments if required by clicking the “Show/Hide built-in comments” button but they cannot be deleted.

*Bear in mind that every new comment should be written as if for a boy; gender pronouns will be automatically changed when comments are selected for girls. Use “xNAMEx” wherever you want a pupil’s name to automatically appear when it is selected for their report.*

When naming your categories e.g. “Yr 1 below average”, it is better to adhere to a naming convention because your categories will be arranged in alphabetical order when presented in a “drop-down” list for selection or when you view them in the comment bank page itself. Therefore, with the above example, your next category would be named “Yr 1 above average” rather than “Yr1 above average”, “Year 1 above average” or “Y1 above average”

You may create as many comments as you need.

## Inserting National Curriculum and QCA sentences

When creating or editing comments for progress or targets, you have access to a large bank of NC, P scales, QCA, NLS, NNS and General statements which can be dropped into your comments; click the one you want then click at the required insertion point in the comment.

To undo an inserted sentence, click “Cancel”.

You may return to any comment bank at a later date to make amendments if you decide to redefine your categories or comments or spot any errors when previewing or printing reports (but see *"Editing and deleting customised comments"* below).

### Printing comment banks

Click the “Preview/print” button in the comment bank pages to preview or print your comment bank for the selected subject.

### Size of comment banks

Within each comment there is no limit to the amount of text you can enter.

The “Category” for each statement e.g. “Y1 above expected level” is limited to 30 characters so that it is easily visible in the “drop-down” selection lists in the reporting areas.

### The “Special needs” comment bank

If you decide to use a comment bank for SEN or Gifted and Talented, you may want to write statements for each of the provision levels of the SEN Code of Practice. The statements might be short and briefly explain what the provision level indicates e.g. “is receiving support at provision level School Action Plus.”

You will be able to add further personalised details of each pupil’s special educational needs or marked aptitudes in the report-writing screens.

## Editing and deleting customised comments

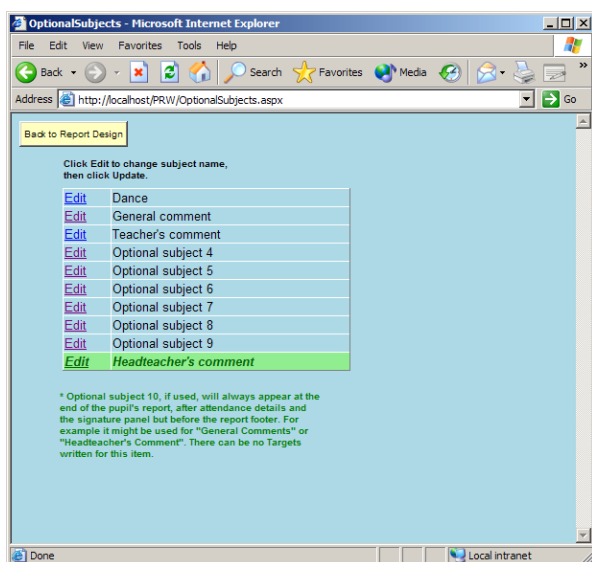
**If you have already begun to use your comment banks** in writing your pupil reports and then decide you wish to amend (or delete) a particular comment which has already previously been applied to any number of pupils, the **ORIGINAL SELECTED COMMENT WILL REMAIN IN THE PUPIL REPORTS UNTIL YOU RETURN TO THE PUPIL REPORT SCREEN AND RESELECT THE CATEGORY FOR THE RELEVANT PUPILS.**

The built-in comments, whose categories end with “PRW” cannot be edited.

## Optional comment banks

If you wish to report on any non-standard or non-statutory reporting areas, there are ten optional comment banks available for this purpose. As with all of the other subjects, the optional subjects will only be shown in a pupil’s report when they have been used for that pupil.

Optional subjects can be named as required. On the menu, click *“Design your reports”*. Then click *“Create/edit optional subject names”*.



Optional subject page

Any subject, including optional subjects, can be placed in any position on your reports as required.

Optional subject 10 is reserved for the end of the report (but before the report footer) and can be used for example for "Headteacher's comment" or "General comments".

## 4 Entering class and school details

On the menu, click "*School and class details*".

In this page you can:

- amend the school name as you want it to appear on the report front covers
- import your school's logo to appear on the report front covers
- add a new report for the school
- add and edit classes for the school

### School name

In the box at the top of the page amend the name of your school as you would like it to appear on the front cover of your reports then

If for any reason you do not want the school name to appear on the cover as a separate item, for example if the school name is part of the school logo, you can delete the school name to leave the box blank; again, click "*Save school name*".

### School logo

If you have your school logo saved as a graphics file (bmp, jpeg, tiff etc.), click "*Browse*" and go to the location of the file. Click on the file name and then click "*Open*". The file name and file location path will appear in the box.

Next click "*Upload logo*". Wait for the file to upload and it will then appear in the logo box.

If you do not have a school logo saved as a computer file then you need to scan it and save it as a .bmp/.jpg/.tiff or other graphic format then follow the instructions above.

If you do not have a school logo as a computer file, and you cannot scan it yourself in order to create one, then send us a good paper copy of it and we will scan it, save it as a graphic-type file and send it back to you by email or floppy disk at no additional charge.

Please note that if you are planning to print your pupils' reports on a colour printer then a colour logo will be fine. Otherwise a black and white logo is better if you are planning to print on a black and white printer.

## Class names

Class names are useful in providing an extra option when selecting your own pupils to view throughout the program or selecting pupils for printing. Class names can also optionally be made to appear on the front-covers of your reports.

You can enter any number of class names.

You can quickly assign pupils to classes in the “*Flood-fill classes*” page: go to the *Pupil details* page and then click “*Flood-fill classes*” (see page 10).

## Report dates

This is where you can add a new report for the school each term or year or as required. Be very careful about deleting report dates because you will delete all the reports associated with that date.

### Creating a new report for your school

Click “*Add new report*”.

Select a month and a year for your new report.

You can apply the report design and format of your most recent report to this new report if required.

Give the report a unique name e.g. 'KS1 summer 2020'

Click “*Save*”.

## 5 Entering pupil details

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On the menu click “*Pupil details*”. It is HIGHLY recommended that you enter pupil data by means of the Common Transfer File.

### Importing pupils from your school’s administrative system with the CTF

The quickest way to enter pupil details is by importing from your school’s administrative system using the Common Transfer File (**see *Appendix A for further instructions***). Most school offices will be very familiar with the CTF as it is a statutory requirement to produce such files when pupils transfer from the school to another.

The CTF can be produced for the whole school roll. When creating the CTF from your admin. system, the Containers to be Exported section, you only need to select the “Student Basic Details” and “Attendance summary” (if required).

The CTF automatically imports pupil name, gender, year group, UPN (Unique Pupil Number) and attendance data (if it has been entered for the current academic year on the school admin. system). Attendance data can be updated with a subsequent CTF file import if the data is added to the school system after the initial CTF import (see Appendix A).

The CTF will not import class details but you can add classes quickly and easily in one go with the Class Flood-fill (see “Flood-fill class details” below).

Once you have created the CTF, on the menu, click “*Pupil details*” then click “*Import pupil details*”.

Click “*Browse*” to locate your CTF and then click “*Upload CTF*” to make the file available to *Primary Report Writer*.

Click “*View import file*” to view the pupils held in your CTF.

“*Click here to import PREFERRED forename*”: you may wish to import the preferred forename e.g. "Josh" rather than "Joshua" - these are held as two separate data items in your school admin. system. The forenames you are about to import are automatically inserted into comments when selected for reports so it depends on how informal you want your reports to appear

Click “*Import new pupils*” to import the pupils into *Primary Report Writer*.

## **Adding pupils “manually”**

Pupils can be entered entirely manually if required. In the “Pupil Details” screen, click the “Add new pupil” button. Enter text in the appropriate boxes and click “Update” when finished.

Attendance details can be omitted if you are not including attendance as part of your reports.

## **Unique Pupil Number (UPN)**

The UPN is very important in correctly identifying pupils. If you do manually enter pupils without a correct UPN, when you come to update your pupil list using the CTF at a later date either to add new pupils or to update details for existing pupils, the program will not recognise that some pupils already exist because it will look for their UPN and not find it - this will of course result in duplicate pupils in your pupil list.

## **Attendance and absence details (optional)**

Attendance details can be omitted if you are not including attendance as part of your reports.

In the appropriate columns, enter the number of sessions (half days) present, the number of sessions of unauthorised absence and the number of times late up to the date specified by the DfES for the purpose of the Annual Pupil Absence Survey.

## **Class or pupil group (optional)**

Class names provide an extra option when selecting groups of pupils to view throughout the program or selecting reports to print.

Select the class or pupil group to which the pupil belongs; you should have previously named your classes or pupil groups in the *School and class details* page.

If you are using the program only to report on one class or only one named group of pupils, you may leave this column blank; in this case you only need to add the name of your class in the Preview/Print section of the program to enable it to appear on your reports (see: “Add a class name to a report front cover.” below.)

## **Flood-fill class details**

You should first add class names in the *School & class details* screen.

You can now enter all your class details for multiple pupils quickly: go to the *Pupil details* screen and click “*Flood-fill classes*”.

In the Class flood-fill page you can select pupils quickly by year-group (or by class if you are *changing classes*) or select pupils individually.

Once you have selected your pupils, select a class from the drop-down list and click “*Make class changes*”.

### **Deleting individual pupils and deleting groups of pupils**

To delete a pupil, click “*Delete*” at the end of the pupil’s row. You will be asked to confirm the deletion. **All the pupil’s current and previous reports will be deleted.**

To delete a group of pupils, for example leavers at the end of the previous year, you can either archive them or delete the pupils and their reports completely (see: “*Archiving reports*”).

### **Editing pupil details**

From the *Pupil Details* screen, click “*Edit*” at the end of the row of the pupil you wish to edit then click “*Update*” when you want to save your changes.

**IMPORTANT: if you change a pupil’s forename in any way after having composed any of that pupil’s subject reports you may need to revise the pupil’s report otherwise the original forename will remain as part of the text.**

### **Selecting pupils to view throughout the program**

You can select just your own pupils to view throughout the program, regardless of how many pupils are held in the program.

On the menu, click “*My settings*”.

Select your pupils by year group and/or by class. Then click “*Save these settings*” so that you see the same pupils every time you log in.

The settings will only be saved on the particular computer that you are using at the time you save the settings. If you use other computers you will have to repeat this process the first time that you log in to each further computer.

### **Updating details for existing pupils by using the CTF**

The quickest way to update details for existing pupils (name, year group and attendance) is by importing a Common Transfer File.

#### **To update surname, forename and year group**

From the *Welcome* page click “*Pupil details*” then click “*Import pupil details*”.

Locate and upload your newly-created CTF then click “*Update existing pupils*”.

**WARNING:** names and year groups will also be changed on your current reports. If you are updating details at the beginning of the academic year you might want to create your new report for the academic year first.

#### **To update attendance data**

From the *Welcome* page click “*Pupil details*” then click “*Import pupil details*”.

Locate and upload your newly-created CTF then click “*Update attendance*”.

## 6 Writing your reports

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On the menu click "*Write reports*".

Select a pupil and then select a subject.

You can now either select a comment from the comment bank or begin typing directly into the large white text box.

You can also build or add to your report by selecting sentences from the NC/QCA statement bank: click "*View NC/QCA statements*", select a sentence then click at the desired insertion point in the report text.

### Saving changes

If you select from the comment bank, the selection is automatically saved to the database. You can of course amend the selected text in any way required.

With any "manual" editing of the text, i.e. typing directly into the text box, your changes must be saved by clicking "*Save changes*".

### Undoing changes

Click "*Undo changes*" to remove any manually entered text or NC/QCA sentence that you have inserted. Changes can only be undone if you have not previously saved those changes.

### The Quick Pupil page: writing a pupil's reports for all subjects quickly

In the "*Write reports*" (or "*Write targets*") page, click "*Quick Pupil*".

Select a pupil from the list. Click on the drop-down arrows at the end of the subject boxes and select a comment from the drop-down list of categories – **NOTE: selections are automatically saved.**

Repeat the process until all the boxes have been filled for that pupil. Repeat this process for each pupil.

Click "*Back to Write reports*" (or "*Back to Write targets*") and you can then see the text that your selections have produced one subject at a time.

### The Quick Subject page: writing subject reports for all pupils quickly

In the "*Write reports*" (or "*Write targets*") page, click "*Quick Subject*".

Select a subject from the list.

Select a comment from the comment bank box.

Tick the pupils for whom the selected comment applies. **NOTE: selections are automatically saved.**

Click "*Back to Write reports*" (or "*Back to Write targets*") and you can then see the text that your selections have produced one subject or one pupil at a time.

### How much text can I add to a pupil's report?

For all subjects you can add *as much text as you want*, printed reports will expand and contract accordingly.

## Inserting National Curriculum or QCA statements

When writing or editing subject reports for progress or targets, you have access to a large bank of NC, P scales, QCA, Primary Framework and General statements which can be dropped into your text. Below the large text box, click the “*View NC/QCA statements*” button. (You must select a pupil and a subject before the button becomes visible). By default, the NC/QCA statement bank relates to the subject report you are currently writing but you can choose any other subject’s NC/QCA statement bank to draw from.

Find and then click the statement you want; click at the required insertion point in the subject report box above.

To remove an inserted statement, click the “*Undo*” button; this will only work if you have not clicked “*Save changes*” since inserting the statement.

You can add as many NC/QCA statements to the comment box as you need.

Click “*Save changes*” before adding each subsequent statement.

Click “*Save changes*” when satisfied with the subject report.

## The Quick Edit page: spell-checking and editing a complete report quickly

In the “*Write reports*” (or “*Write targets*”) page, click “*Quick Edit*”.

Select a pupil from the list.

You can manually edit any report text.

You can spell-check the selected pupil’s entire report.

Click “*Save changes*” when you have finished.

## 7 Adding Targets to reports

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Targets can be added for each subject in a similar way to writing progress reports. In the “*Write reports*” page click “*Write learning targets*” button.

Targets can be selected from your customised sets of targets for each subject or else type in manually from scratch.

As with Progress Reports, there is access to a bank of targets based on the National Numeracy, and Primary Framework for Reading, Writing, Speaking and Listening and Maths that can be dropped directly into the text box.

## 8 Designing your reports

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To design your reports exactly as you want them, on the menu click “*Design your reports*”.

### Subject order:

Move subjects up and down the subject list by clicking on a subject and then using the up and down arrows to move the subject into the required position.

One click of an arrow will move a subject one position. After clicking an arrow please wait for the screen to refresh and move the subject into its new position before clicking the arrow again.

## Add or remove subjects

To remove a subject from the report list, select the subject in the report list and click the “ – “ button; the subject will be moved to the unused subjects list.

To add a subject to the report list, select the subject in the unused subjects list and click the “ + “ button; the subject will be moved to the bottom of the report list and can then be moved up the list to the position required.

IMPORTANT: when you have completed your subject list click “*Save your subject order*”.

If you want to restore the original default subject order click “*Restore to default order*”.

## Change subject headings:

Click “*Change report headings*”. For each subject as required, click “*Edit*” to change the headings that will appear above each subject in the report. You can change the headings for your optional subjects here too regardless of how you have named them originally.

If you want a subject heading to be invisible, delete the heading to leave the heading box completely blank then click “Update”. When you return to the report-writing pages you will notice that the subject with the invisible heading is now bracketed e.g. “(Writing)”.

## Optional subjects

See page 7: “Optional comment banks”.

## Formatting your reports

In the “*Design your reports*” page, click “*Format reports*”.

### General settings

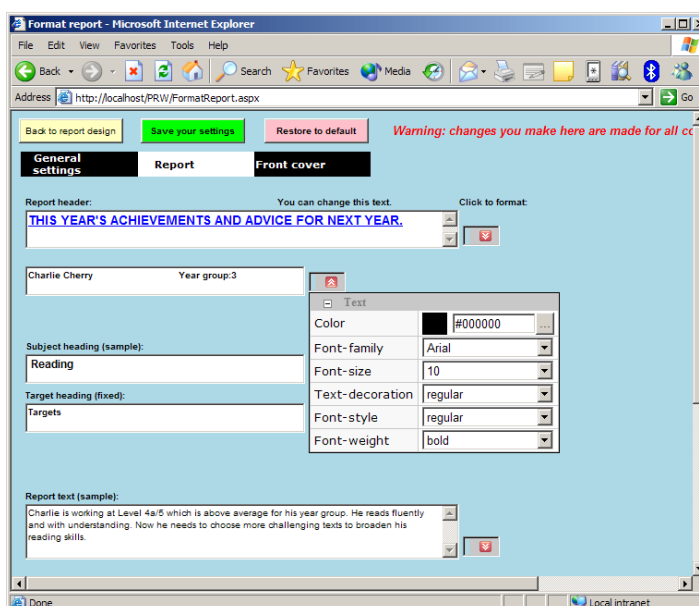
In this section you must choose to include or exclude targets for individual subjects, attendance data and signature box (see: “*Signature box*” below) in your reports.

You can also choose other design options on this page.

### Report settings

In the “*Format report*” page, click “*Report*”.

All of the items on this page appear as elements of the report itself and all can be formatted for font, size, colour, bold and underline; click the red button to the right of each box to open the formatting box. Click the red button again to close the box when you have finished formatting.



For some items, the text that shows in the final report can actually be changed on this page, for example the report header and the report footer; such boxes are annotated “*You can change this text*”.

### **Front cover settings**

In the “*Format report*” page, click “*Front cover*”.

As with Report settings, all the items on the front cover can be formatted for appearance and some of the text can be edited.

Three of the items on the front cover, Class name, Report name and Additional text have the option to shown or hidden.

## **9 Previewing and printing reports**

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On the menu click “*Print Reports*”.

You may preview or print reports for individual pupils, for groups of pupils or for all pupils by clicking on the appropriate buttons to select them.

You can choose to include the front page when printing reports or choose to print the front pages separately.

You can choose to send reports straight to Adobe Reader format (.PDF) for previewing and printing. If you don't have Adobe Reader installed you should click the “*Get Adobe Reader*” button to download and install it.

By default, the reports printed are current reports but at the top of the page you can select a previous report to print or even all reports from current and previous years.

### **Quickly add a class name to a report front cover**

To add an instant class name to the front covers of all your reports, type the required class name into the “*Class name*” box on the “*Print Reports*” page. This will override any class names that have been assigned to pupils in the “*Pupil details*” page.

To save the class name for printing future reports on the current machine that you are using, click the “Save” button.

To clear a class name, click the “Clear” button; the class name shown on your reports will now be the class names assigned in the “Pupil details” page.

If you don't want class names or teachers to be shown on your reports then don't assign class names or teachers to pupils in the “Pupil details” page and don't enter an instant class name on this page. Alternatively, go to the “Design your reports” page, click “Format”, click “Front cover”, then uncheck the “Show class name and label” box; finally, click “Save your settings”.

### **Printing from Apple Macs**

On an Apple Mac, with either Safari or Internet Explorer for Mac, when you send your reports straight to PDF, the Mac will initially open the reports in its own “Preview” program rather than in Adobe Reader. If you try to print your reports directly from “Preview” there will be errors and unwanted punctuation marks. The Adobe Reader PDF containing your reports will actually be placed on your desktop and it is this file that you should open in Adobe Reader and print from.

## Printing archived reports

You can print reports for archived pupils in the "*Print reports*" page. Click the "*Show archived pupils*" option to include archived pupils in the list of current pupils.

You can also print reports for archived pupils in the "*Year end routines / Archive*" screen: click "*View archived pupils*". Select pupil(s) whose report(s) you wish to print. Select the report to be printed. Click "*Preview/print selected reports*".

## 10 Emailing reports

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You can email reports to parents or carers as follows:

- 1) Log in with the Admin password and then click "*Email reports*" on the menu bar.
- 2) Click the "*Email admin*" tab.
- 3) To import contacts and their email addresses for your pupils, you must create a file in CSV format containing the following information for each pupil:

- i) Pupil's UPN (Unique Pupil Number)
- ii) Contact title
- iii) Contact forename or initial(s)
- iv) Contact surname
- v) Contact's email address

The file MUST have a header row with the following column titles:  
UPN, ContactTitle, ContactForename, ContactSurname, EmailAddress.

You should be able to export this information from your school admin system.

Click "Browse" to locate your file and then click "Import".

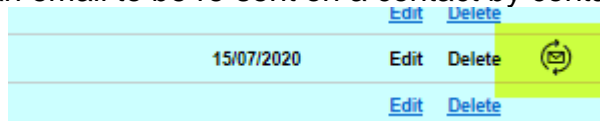
NOTE: you can add contacts and email addresses manually if you like. To do so click the "Email reports" tab and then click "Add contact". This will take you much more time than adding contacts from your admin system as described above.


- 4) Still in the "*Email admin*" tab, click "*Compose email*" to compose the subject and text of your email.
- 5) Choose the option "*Add password to pupil's emailed report*" if you want to increase the security of your emailed reports. The option requires the recipient of the email to open the report file with a password which is included at the bottom of the email and which Primary Report Writer will automatically generate.
- 6) Click the "*Email reports*" tab to begin emailing reports to the contacts you have imported.
- 7) You can email a maximum of 60 reports in one go so most schools will send one year group at a time or one class. Each batch of 60 will take about 3.5 minutes to complete.
- 8) You will probably receive a report that a few emails have failed. This is expected because not all email servers send delivery responses. Most of those emails will however have been delivered.

9) Many schools then choose to send a blanket email to all parents/guardians asking them to contact the school if they have not received their child's emailed report.

10) In the "*Email admin*" tab, click "View email history" for a complete report on your mailout in which you can filter for example any failed emails.

NOTE: you can only send a pupil's report to each contact just once. There is an option however to re-enable an email to be re-sent on a contact by contact basis – see below:



	<a href="#">Edit</a>	<a href="#">Delete</a>	
15/07/2020	<a href="#">Edit</a>	<a href="#">Delete</a>	
	<a href="#">Edit</a>	<a href="#">Delete</a>	

## 11 Year-end routines

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On the menu click "*Year end routines*". At the beginning or end of an academic year

### Update year groups

NOTE: it is recommended that year groups be updated by using the Common Transfer File (see page 11).

If you need to do this manually however, first select the pupils to be updated by year group and/or by class. Each selected pupil will be ticked.

Select the year group that you want the selected pupils to be assigned to then click "*Make year group changes*".

### Update classes

First select the pupils to be updated by year group and/or by class. Each selected pupil will be ticked.

Select the year class that you want the selected pupils to be assigned to then click "*Make class changes*".

NOTE: in order for classes to be available so that pupils can be assigned to them, you should first set up your classes in the "*School and class details*" page.

## Archive pupils and reports

In "*Year end routines*" click "*ARCHIVE pupils*".

When pupils leave the school, they and all their reports can be archived. Pupils that are to be archived can be selected by year group or by class. Click "*ARCHIVE selected pupils*" when you have selected the pupils to be archived.

When pupils and reports are archived, they no longer appear in any other screen within the program except for the "*View archived pupils*" screen (see: "To restore archived pupils" below).

If a pupil has no current or previous reports in the program then the pupil will simply be deleted without being archived. To reinstate such a pupil, details will have to be added manually in the "*Pupil details*" screen or by means of the Common Transfer File.

### To restore archived pupils

In the "*Archive*" screen, click "*View archived pupils*". You may restore archived pupils and their reports back into the program for example, if a pupil leaves the school but is then re-admitted.

Select pupils to be restored and then click "*RESTORE selected pupils*". The selected pupil(s) and all previous reports will be restored to the program.

### **To print reports of archived pupils**

In the "*Archive*" screen, click "*View archived pupils*". Select pupil(s) whose report(s) you wish to print. Select the report to be printed. Click "*Preview/print selected reports*".

You can also print reports for archived pupils in the "*Print reports*" page. Click the "*Show archived pupils*" option to include archived pupils in the list of current pupils.

## **12 My settings**

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### **Select your pupil**

In "My Settings" you can select only your own pupils to view throughout the program. You must click "Save these settings" after making your pupil selection.

### **Select your comments**

You can select only the categories of comments that you want to see throughout the program. From the "*My Settings*" page, click "Select my comments only". You can get to the "Select my comments only" page from various other pages too.

Possible selections are based on the first consecutive characters of the categories before a space e.g. "Year1 above expected" would be displayed in the selection list as "Year1". Therefore, it is important to remember this convention when naming your own categories e.g. if you name your category as "Year 1 above expected" (note the space after the first word), the selection displayed would be "Year" - which is not particularly helpful.

You can also tick the check-box to further limit your selection to the comments you have created as a school i.e. to hide the built-in comments.

Click "Save these settings" after making your selections which will be applied each time you log on with the same machine. Settings can be changed whenever you want.

Saved settings only apply to the machine on which you save the settings. If you start work on another machine you will need to save those settings again on the new machine.


### **Select a different report**

Also from "My Settings". You can choose to view an earlier or different report design throughout the program – just click the selection box below "Select the report you want to view in this session." Click "Always show this report" if you want the selected report to be displayed by default when you open the program. This is particularly useful if you want to have two concurrent report designs for say KS1 and KS2.

## **13 Help and support**

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For advice, guidance or in case of difficulty with the program, click on the "*Help*" button on the menu and then choose the type of support required.

There are also quick-help buttons at various points like this:  which explain particular functions on the page you are looking at.

**Alternatively, you can call the telephone support line Monday to Friday, 8am-8pm on 0845 402 9918 or email: [support@bluehills.co.uk](mailto:support@bluehills.co.uk) any time.**

## Appendix A: Importing pupil data from school's administrative system (SIMs etc.)

Data can be imported into the program by means of the Common Transfer File (CTF). All school administrative systems (e.g. SIMs, Phoenix, Integris, CMIS, Wauton Samuel etc.) produce a CTF in identical formats. All schools are now required to produce a CTF when pupils transfer to another school so the routine should be familiar to school admin staff. The instructions below relate to SIMS; instructions for other systems should be available within the support sections of those systems.

Users of systems other than SIMS should note point (e) below relating to creation of a destination "school".

- a) Open SIMS on your school's administrative computer/network and go to the screen in which you would normally create a Common transfer File. In SIMS.Net the route is Routines\Data Out\CTF\Export CTF
- b) Before that, in Tools\Setups\CTF you can select the "Collect Attendance Data From" method from the drop-down list.

The options are Pupil/Student Attendance Summary or Attendance Module.

For users with the SIMS Attendance module, please select the latter option. The system will collate its data from the Attendance records already held. For users without SIMS Attendance, selecting the Student Attendance Summary will enable data to be entered manually into the CTF Attendance Summary panel within a specific Pupil's/Student's Details record.

- c) In Routines\Data Out\CTF\Export CTF, in the Pupil/Student Options panel, specify the View from the drop-down list and tick the check box to Include Pupils/Students Already Exported in the export file. Select pupils to include in the transfer as required (e.g. whole school roll or selected pupils). Right-clicking anywhere within the Pupil/Students grid (SIMS.Net) will allow you to *Select All* the pupils/students displayed.
- d) In the Containers to be Exported section (SIMS.Net), you only need to select the "Student Basic Details" and "Attendance summary" (if required).
- e) The first time you produce a CTF for *Primary Report Writer* you should create a dummy school called "PRWDATA" (or similar) with the number "777/7777" (there are no LEAs in England or Wales with such a number.) Users of SIMS.Net however can use "ENGLAND" which is pre-installed as a destination LEA specifically for these types of "global" CTF and there is no need to select a destination school. The recommended way to do this is to go to the first pupil in the list and click in the column headed "Destination LEA/Other". Then scroll to the bottom of the list. Then hold down the "Shift" key and against the last pupil in the list click in the column headed "Destination LEA/Other". Now from the drop-down list select "ENGLAND".
- f) Click on the "Export CTF" button to create and save the export file to the location specified when configuring the CTF Defaults. Note the name of the file and its location folder. The file will be named something like: "2345678\_CTF\_ENGLLLL\_001.XML". DO NOT RENAME THE FILE.

- g) Click “Continue”; if your school uses SIMS Attendance Module, attendance data will be automatically collected for the selected pupils – to allow your system to do this, go to Tools/Setup, open Setup, then CTF Setup and select the appropriate Collect Attendance Data option. Otherwise, attendance data can be added manually at this point, or manually in *Primary Report Writer* after import. You may wish to do a subsequent CTF import at a later date if the data is not yet complete in Attendance Module (see below: “Updating attendance data”).
- h) In “My Computer” or “Windows Explorer” navigate to the folder containing the CTF file you have just produced.
- i) If the CTF file is not stored on a shared folder, copy the CTF file to a memory stick, ZIP Disk, CD or any other appropriate external medium.

### **School admin. systems that cannot produce a CTF file for whole school**

Most school admin systems are capable of producing a CTF file for the whole school roll. If however your particular school admin. system is unable to do this then you should produce files, for example, one year group at a time or in the largest groups that your system allows. In this way groups of pupils can be added incrementally.

### **Updating attendance data**

When you first import pupils from the CTF into the program, attendance data may be missing from the school system; either it is too early in the year or else the data has not yet been entered on the school system. When you know that the attendance data is available on the school system, a second CTF can be produced for the same pupils as contained in the first CTF file; the second CTF file will contain the attendance data for the current academic year.

Once you have created the new CTF, from the menu in *Primary Report Writer* click “*Pupil details*” then click “*Update attendance*” and follow the on-screen instructions.

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