

Preparing for the Spring School Workforce Census 2009

Version 1.02

Contents

Contents	2
Revision history	4
Introduction	4
Overview of the Process of Producing the School Workforce Census 2009 Return	4
What Version of SIMS .net do I Need to Run the Spring School Workforce Census 2009?	5
Permissions Required	5
Applying the School Workforce Census Licence.....	5
Importing Lookup Files	6
Overwriting the Existing WorkforceReturnSettings.XML File	8
Importing Service Term Definitions	8
Reviewing Service Term Definitions.....	9
Mapping Subjects to DCSF Codes.....	12
Preparing Staff Level Information	13
Importing Pre-defined Report Definitions	15
Running the SWC Spring Report.....	16
Dealing with Unwanted Teacher/Support Staff Records.....	16
Preparing School Level Information	16
What Next?	17
Carrying Out a Dry Run	17
Producing a Detail Report	20
Producing the School Workforce Census 2009 Return.....	20
Where Can I Get More Information?	20

Preparing for the Spring School Workforce Census 2008 Check List

Use this check list to tick off each of the preparation tasks when they have been completed.

Description
<input type="checkbox"/> Check with the System Administrator/Manager that you have the appropriate Permissions to run the School Workforce Census and record associated data. See <i>Permissions Required</i> on page 5.
<input type="checkbox"/> Upgrade to the SIMS 2008 November Main Release (version 7.112) or later as soon as possible to enable dry runs to be carried out. See <i>What Version of SIMS .net do I Need to Run the Spring School Workforce Census 2009?</i> on page 5.
<input type="checkbox"/> Apply the School Workforce Census licence, if not applied previously. See <i>Applying the School Workforce Census Licence</i> on page 5.
<input type="checkbox"/> Import the latest CCS_Base_lookups file, if not already imported. See <i>Importing Lookup Files</i> on page 6.
<input type="checkbox"/> If an LA base lookups file has been provided by your LA or support team, import these. See <i>Importing Lookup Files</i> on page 6.
<input type="checkbox"/> Import the Service Term definitions file, if one has been provided by your LA or support team. See <i>Importing Service Term Definitions</i> on page 8.
<input type="checkbox"/> Ensure Subject Codes are mapped to DCSF codes. See <i>Mapping Subjects to DCSF Codes</i> on page 12.
<input type="checkbox"/> Import the latest Pre-defined Report Definitions into SIMS .net. See <i>Importing Pre-defined Report Definitions</i> on page 15.
<input type="checkbox"/> Ensure Service Term definitions are correct and make any required edits. See <i>Reviewing Service Term Definitions</i> on page 9.
<input type="checkbox"/> Review all staff details and ensure these are correct. See <i>Preparing Staff Level Information</i> on page 13.

Revision history

Doc. Version	Change Description	Date
1.0	Initial Release	04/01/08
1.01	Updated Release	20/02/08
1.02	Updated Release	22/10/08

Introduction

This preparation guide has been produced to help identify the tasks that need to be carried out before running the Spring School Workforce Census 2009 and includes instructions for the most common tasks. It is applicable to all schools involved in the pilot. This guide covers the preparations required for the Spring School Workforce Census (15 January 2009) only.

The following documents/resources may also be of interest:

- *Producing the School Workforce Census Spring Return 2009* handbook.
- *School Workforce Census 2009 Errors and Resolutions* document.

These can be obtained from our SupportNet website (<http://support.capitaes.co.uk>) as soon as they are made available by entering **SWCENSUS** in the **Site Search** field on the **Home** page, then clicking the **Go** button. A list of all available supporting information will be displayed from which the required resources can be selected. Please check SupportNet on a regular basis as documents will be posted as soon as they become available.

Overview of the Process of Producing the School Workforce Census 2009 Return

The following list provides a brief outline of the steps involved in producing the School Workforce Census return. For full instructions, please see the associated handbook (available by clicking the **Other handbooks** link in the SIMS .net **Documentation** panel and selecting the School Workforce Census Spring Return 2009 handbook).

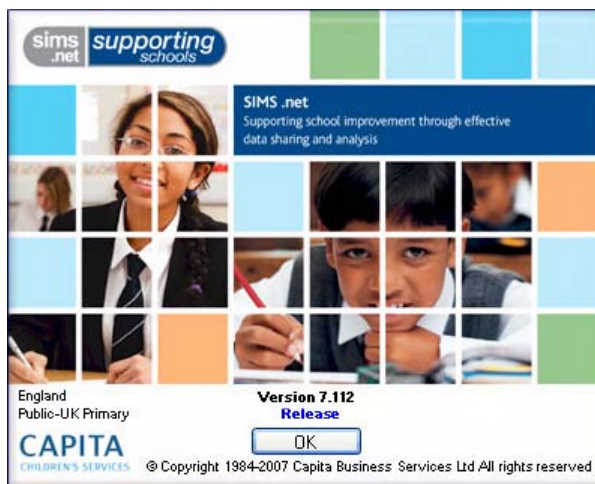
- Upgrade to the SIMS 2008 November Main Release (7.112) or later as soon as possible and carry out one or more dry runs to identify any errors that may exist in your data.
- Ensure that the relevant workforce and school data exists in SIMS .net and that it is complete and correct.
- Generate the School Workforce Census return, manually entering vacancies information as required.
- Resolve any errors/warnings and validate the return again until you are satisfied with its content.
- Authorise the return by obtaining the Head Teacher's authorisation.
- Send the return to your Local Authority or to the DCSF.

What Version of SIMS .net do I Need to Run the Spring School Workforce Census 2009?

In order to run the Spring School Workforce Census 2009, you must be running the SIMS 2008 November Main Release (7.112) or later.

Once upgraded to version 7.112, you can carry out 'dry runs' of the return. This will help to identify any potential data issues which can be corrected ahead of the final return. For more information, please see *Carrying Out a Dry Run* on page 17.

If you are unsure which version of SIMS .net you have installed, open SIMS .net and select **Help | About SIMS .net** to display the following dialog:



The version should read 7.112 or above.

Permissions Required

You will need to be a member of the *Personnel Officer* User Group in System Manager to produce the School Workforce Census return.

Users with these Permissions can run and edit the School Workforce Census. In addition, they can correct failed data for vacancies, staff and any curriculum information that fails validation.

Please see your System Administrator/Manager if you are not sure whether you have the required Permissions.

Applying the School Workforce Census Licence

Two patches are available from SOLUS to license the SIMS School Workforce Census functionality.

Patch ID 11118

This patch licenses the School Workforce functionality for schools with Personnel 7 in read/write mode. Users applying this licence will need to manually deselect the **Eligible for SWR** check box in the **Basic Details** panel of every staff member's **Employee Details** record.

Patch ID 12196

This patch licenses the School Workforce functionality for schools with Personnel 7 in read/write mode and in addition, provides a helpful initial position for the **Eligible for SWR** check box in the **Basic Details** panel of every staff member's **Employee Details** record. Further details on the patches can be found in their respective release notes.

Importing Lookup Files

Lookups that are defined by your LA or support team can be imported into SIMS .net for use with the staff related functionality. You should import the latest CCS_Base_Lookups file provided by Capita Children's Services before importing any provided by your LA. The following instructions apply to both processes.

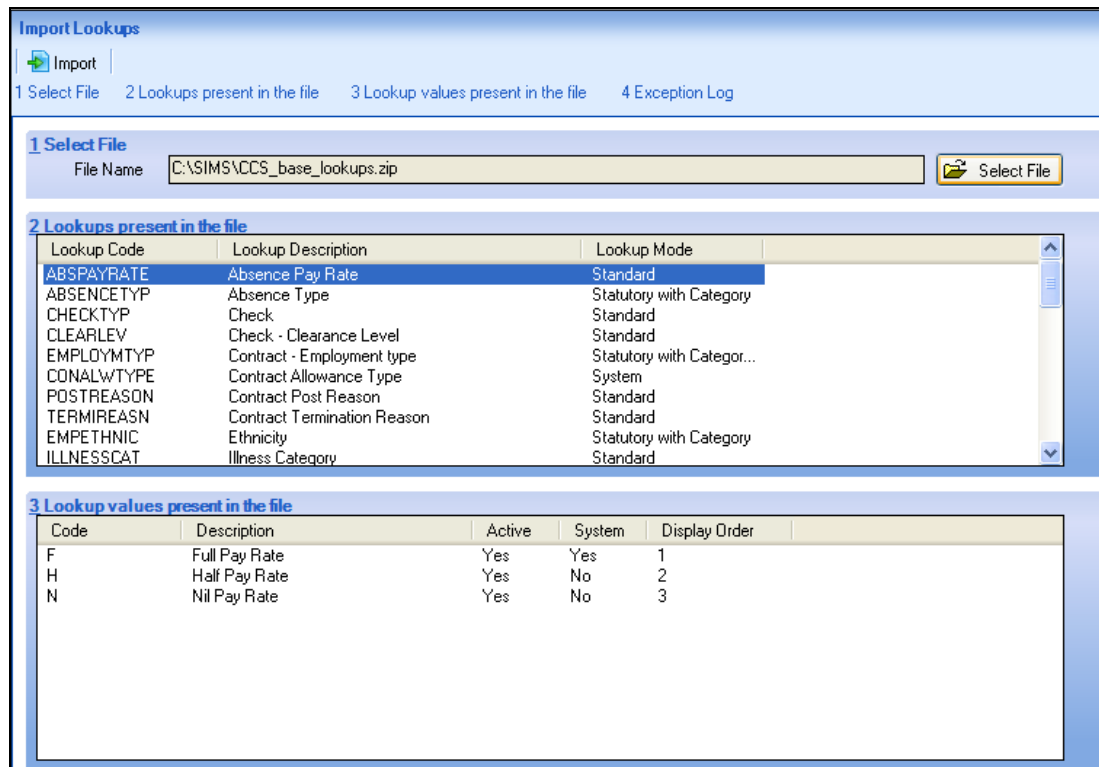
The import mechanism automatically identifies the correct file for your school/region type. There may be more than one file of lookups pertinent to your school/region type in the archive file and all of them are required to be imported. This may mean that to complete the import process, you have to invoke the import function more than once.

If you are importing the CCS_Base_Lookups file, this can be found in the C:\SIMS folder (where C:\ represents the drive where the SIMS folder is located). If you are importing a file from your LA or support team, save the file and the matching signature file to an appropriate location on your computer before beginning the import process.

Schools can also import JACSCodes from the C:\SIMS folder, if required.

NOTE: Both the file and its matching signature file must be saved to the same location.

1. Select **Tools | Lookups | Import Lookups** to display the **Import Lookups** page.



2. Click the **Select File** button to display a standard Windows® **Open** browser.
3. Navigate to the location of the ZIP or XML file and click the **Open** button.
4. The **Lookups present in the file** panel is then populated. To view the lookup values present in the file, highlight the required lookup. The values are then displayed in the **Lookup values present in the file** panel.
5. To import the lookups, click the **Import** button.

NOTE: The CCS_Base_Lookups file has a number of files that contain lookups for different regions i.e. England, Wales, Northern Ireland and the Rest of the World. Once you have selected the location of the CCS_Base_Lookups file, the import process ensures that only lookups that are appropriate for your region, based on your own settings, are imported.

*This means that there is a short period of time during the import where the following message is displayed in the bottom left-hand corner of the Status Bar: **'File cannot be imported as the selected file is not valid for this school.'***

*Once the file(s) are located in the CCS_Base_Lookups file for your region, they are displayed on-screen. Click the **Import** button to import the files. If any files are still displayed on the screen after the initial import process is complete, click the **Import** button again. Continue this process until all the files are imported.*

If no problems are found, the lookups file will be imported into SIMS .net. These lookups are available for use once SIMS .net has been closed and re-opened.

NOTE: This applies to all users in SIMS .net at the time the lookups are imported.

6. Any errors in the ZIP or XML file that prevent it from being imported successfully are displayed in the **Exceptions Log** panel.

NOTE: A faulty lookup will not prevent the other lookups from being imported, although other errors may.



7. To save a copy of the Exception Log in TXT format, click the **Save** button. A Windows® **Save** dialog is displayed. Select a location, enter the required filename and click the **Save** button.
8. To print a copy of the Exception Log, click the **Print** button.

IMPORTANT NOTE: Any changes made will not be visible until all users, including yourself, have restarted the SIMS .net application. If users proceed to run the School Workforce Census without restarting SIMS .net, an error message is displayed.

Overwriting the Existing WorkforceReturnSettings.XML File

This file contains strings of XML code that indicate to the SIMS .net database, which containers or types of Staff data should be collected when running the School Workforce Census Return. The default file supplied by Capita Children's Services currently specifies that all containers or types of Staff data should be collected.

It is possible for LAs to decide which of the Staff data containers should be supplied by the school and to this end, it is possible for LAs only to edit the contents of this file. The edited file should be imported by receiving schools and copied into the C:\Program Files\SIMS\SIMS .net folder to overwrite the existing copy.

Once the amended file has been copied to the C:\Program Files\SIMS\SIMS .net folder and has successfully overwritten the existing version of the file, select **Tools | Setups | Statutory Returns | School Workforce Census Defaults** to check that the data containers with a value of **True** are selected. When the School Workforce Census Return is run, only the Staff information in these data containers will be collated and incorporated into the return.

Importing Service Term Definitions

If the LA or support team has provided you with Service Term definitions, these should be imported into SIMS .net. This file includes Superannuation Schemes, National Insurance Rates and Service Terms. These may require editing after import.

1. Save the Service Term Definitions file and the matching signature file sent by the LA or support team to an appropriate location on your computer.
2. Select **Tools | Staff | Pay Related Import** to display the **Import Service Terms** page.
3. Click the **Select File** button to display a standard Windows® **Open** browser.
4. Navigate to the location of the XML file and click the **Open** button.

The **Service Terms** and **Superannuation Schemes** panels will be populated.



5. To import the lookups, click the **Import** button.

If no problems are found, the lookups file is imported into SIMS .net. These lookups are available for use immediately.

Any errors in the XML file that prevent it from being imported successfully into SIMS .net will be displayed in the **Exceptions Log** panel.

NOTE: If there is an error within a Service Term, that Service Term is not imported. This will not prevent other Service Terms in the same file from importing.

6. To save a copy of the Exception Log in TXT format, click the **Save** button. This will open a Windows® **Save** dialog. Select a location, enter the required filename and click the **Save** button.
7. To print a copy of the Exception Log, click the **Print** button.

Reviewing Service Term Definitions

A Service Term helps define a staff contract. It contains generic information including the number of hours worked per week, weeks worked per year, etc. Some Service Terms have scales defined within them, which determine the annual salary or hourly rate payable and allow spinal progression, where an employee's salary increments annually.

Service Term information can be imported from a file provided by your LA or support team as described in the previous section, or entered manually. For more information on adding and editing Service Term information, please refer to *Chapter 2* in the *Managing Staff in SIMS .net* handbook, accessed by clicking **Other handbooks** in the SIMS .net **Documentation** shortcuts panel and clicking **Personnel – Managing Staff in SIMS .net**.

Four reports are available in SIMS .net to facilitate preparation for the School Workforce Census. The reports can be found through **Reports | Run Report**.

Name	Focus	Owner	Supplier	Updated	Version
ST Allowances	Service ...	Imported	CES Reporting Services	06/12/2007	
ST Definition	Service ...	Imported	CES Reporting Services	06/12/2007	
ST Pay Scale Definitions	Service ...	Imported	CES Reporting Services	06/12/2007	
ST Post Definitions	Service ...	Imported	CES Reporting Services	06/12/2007	

The report names (including their location in the **Report Browser** navigation tree) are:

- **Focus | Service Term | ST Allowances**

Green Abbey School		
Service Term Allowance Definitions		
AT: Advanced Skills Teacher		
Allowance	Allowance	Category
LD: Leadership		
Allowance	Allowance	Category
MW: Manual Staff		
Allowance	Allowance	Category
NJ: NJC - APT & C Staff		
Allowance	Allowance	Category
TE: Teachers		
Allowance	Allowance	Category
MGT1	Management 1	Management Allowances
MGT2	Management 2	Management Allowances
MGT3	Management 3	Management Allowances
MGT4	Management 4	Management Allowances
TL1B	Teacher Learning 1B	Teaching and Learning Responsibility Payments

Select **Tools | Staff | Pay Related** and click the **Allowances** hyperlink. Highlight an **Allowance** and click the **Open** button to allocate **Categories** to **Allowances**. The default **Category** of **Other** is displayed in the report if Categories are not allocated to Allowances.

Focus | Service Term | ST Definition

WATERS EDGE PRIMARY SCHOOL			
AT: Advanced Skills Teacher			
Spinal Progression:	F	Salaried:	T
Increment Mth:	0	Teacher:	T
Hrs / Wk:	27.5000	Term Time Only:	F
Wks / Yr:	52.14300	Hidden:	F
Points, Min:	1.0	Single Pay Spine:	T
Points, Max:	27.0	Interval:	1.0
Superannuation:			
TEAC	Teachers	8.05	
Financial Sub-groups			
LD: Leadership			
Spinal Progression:	F	Salaried:	T
Increment Mth:	0	Teacher:	T
Hrs / Wk:	26.2500	Term Time Only:	F
Wks / Yr:	52.14300	Hidden:	F
Points, Min:	1.0	Single Pay Spine:	T
Points, Max:	43.0	Interval:	1.0
Superannuation:			
TEAC	Teachers	8.05	
Financial Sub-groups			
MW: Manual Staff			
Spinal Progression:	F	Salaried:	F
Increment Mth:		Teacher:	F
Hrs / Wk:	37.5000	Term Time Only:	F
Wks / Yr:	52.14300	Hidden:	F
Points, Min:	1.0	Single Pay Spine:	F
Points, Max:	1.0	Interval:	1.0

Focus | Service Term | ST Pay Scale Definitions

Green Abbey School				
Pay Scale Definitions				
AT: Advanced Skills Teacher				
Scale		Points	Region	National Scale
AST	Advanced Skills Teacher	1.0 - 27.0	Rest of England	Advanced Skills Teachers
LD: Leadership				
Scale		Points	Region	National Scale
HTG4	Headteacher Group 4	14.0 - 25.0	Rest of England	Leadership
HTG5	Headteacher Group 5	18.0 - 29.0	Rest of England	Leadership
MW: Manual Staff				
Scale		Points	Region	National Scale
GR 1	Grade 1	1.0 - 1.0	Rest of England	Other
GR 2	Grade 2	1.0 - 1.0	Rest of England	Other
GR 3	Grade 3	1.0 - 1.0	Rest of England	Other
GR 4	Grade 4	1.0 - 1.0	Rest of England	Other
NJ: NJC - APT & C Staff				
Scale		Points	Region	National Scale
SC 2	Scale 2	11.0 - 13.0	Rest of England	National Joint Council (Local Government Services)
SC 3	Scale 3	14.0 - 17.0	Rest of England	National Joint Council (Local Government Services)

▪ **Focus | Service Term | ST Post Definitions**

Green Abbey School			
Service Term Post Definitions			
AT: Advanced Skills Teacher			
Post		Category	SWR Post
AST	ADVANCED SKILLS TEACHER	Teacher, Other	Excellent Teacher
LD: Leadership			
Post		Category	SWR Post
HT	Headteacher	HT Headteacher	Head Teacher
DH	Deputy Head	Teacher, Other	Head Teacher
MW: Manual Staff			
Post		Category	SWR Post
CARE	Caretaker	Not inc on Form 7/PLASC	Support Staff
KITC	Kitchen Staff	Not inc on Form 7/PLASC	Support Staff
MID	Midday Supervisor	Not inc on Form 7/PLASC	Support Staff
ASCK	Assistant Cook	Not inc on Form 7/PLASC	Support Staff
ASCA	Assistant Caretaker	Not inc on Form 7/PLASC	Support Staff
HDCK	Head Cook	Not inc on Form 7/PLASC	Support Staff
CLEA	Cleaner	Not inc on Form 7/PLASC	Support Staff
NJ: NJC - APT & C Staff			
Post		Category	SWR Post
ADMN	Admin Clerk	AC Other Admin/Clerical	Support Staff
LAB	Lab Assistant	TE Laboratory Assistant/Tech	Support Staff
TECH	Technology Technician	TE Laboratory Assistant/Tech	Support Staff

Mapping Subjects to DCSF Codes

Job vacancies are collected as an integral part of the School Workforce Census return. These are usually entered manually into SIMS .net and should be associated with the subject where the vacancy exists. To enable vacancies to be recorded accurately, it is recommended that all the subjects taught in school are mapped to DCSF subject codes.

NOTE: Primary schools must ensure that at least one subject has been mapped to the DCSF subject code of Primary Curriculum.

1. Select **Tools | Setups | Subjects** to display the **Find Subject** browser.



A combination of subject **Title**, **Year Taught In** and **Active** status can be used to refine the search for the required subject. Alternatively the fields can be left blank to list all subjects.

2. Click the **Search** button to display a list of subjects that match the search criteria.
The list of subjects can be sorted by each column (**Code**, **Title**, **Coordinator** or **Active**) by clicking the required column heading.
3. Highlight the required subject and click the **Open** button to display the **Subject Detail** page.

4. Amend the details as necessary and click the **Save** button.

*NOTE: Secondary schools are not permitted to edit the subject **Code** or **Title** if a subject is used by more than just Curriculum and Lesson Planner. If Secondary schools want to edit these elements they must do so using the normal procedures in NOVA -T.*

5. Click the **Close** button in the top right-hand corner of the **Subject Detail** page.

NOTE: When these subject codes are exported to NOVA-T6, NOVA will recognise that changes have been made and will seek confirmation from the NOVA user that the corresponding NOVA Subject Code should also be updated. NOVA-T4 users will have to duplicate the changes to subject codes in NOVA-T4.

Preparing Staff Level Information

Before beginning the School Workforce Census return, ensure that all current staff are included in SIMS .net and that as far as possible, the information is current and accurate.

Ensure that:

- new staff have been added.
- any leavers have been recorded as such.
- any duplicated or unwanted staff records have been amended (see *Dealing with Unwanted Teacher/Support Staff Records* on page 16).
- part-time details have been checked/updated for all applicable members of staff.
- staff address information is up-to-date and complete.

Basic staff information and contract information will be included in the return for all teachers and support staff with contracts of one month or greater on the census day. Minimal information will be collected regarding occasional staff (staff with service of one month or less).

This table highlights key areas in Staff Records that should be checked thoroughly to minimise errors.

Panel Name/Location of Field	Notes	Action Required
Personal Information panel		
Ethnicity	Select from the Ethnicity lookup values	Check for all staff members
NI Number	Correctly structured numbers entered	Check for all staff members
Professional panel		
HLTA Status	Selected where applicable	Complete for relevant staff members
HLTA Date	Selected where applicable	Complete for relevant staff members
QTS Route	Qualified Teachers only	Complete for teaching staff, if known
Training	Record associated classroom absence	Complete for past year only
Qualifications	Level, First Subject, Second Subject and Verified	Enter, if known
Absences panel		
Absences	Dates, Working Days Lost, Type/Reason and Payroll Absence Category	Complete for past year only
Employment Details panel		
Teacher Number	Correctly structured numbers entered	Must be entered for all teachers
Teacher Category	Select from drop-down list	Must be entered for all teachers
Qualified Teacher Status	Mandatory if Teacher Number entered	Must be entered for all teachers
Employment Start Date	Required information	Check for all staff members
Employment Details/Contract panel		
Employment Type	Required information	Check for all staff members
Contract Start Date	Required information	Check for all staff members
Contract End Date	Required information	Contract End Date
Service Term Hours/Week	Required information	Check for all staff members
Hours/Week	Required information	Check for all staff members
Weeks/Year	Required information	Check for all staff members
Origin	Current staff defaults to Not Known , required information for new staff	Enter for new staff only
Safeguarded Salary	Selected where applicable	
Destination	Required information	
SWR Post	Implemented by Pay Related Definitions	No action required
Pay Scale	Implemented by Pay Related Definitions	No action required
Allowances	Implemented by Pay Related Definitions	No action required
Role	Complete for all staff	Check for all staff members
Employment Details/Service Agreement panel	New fields	Complete for relevant staff members
For Past Contracts		
Service End Date	Required information	

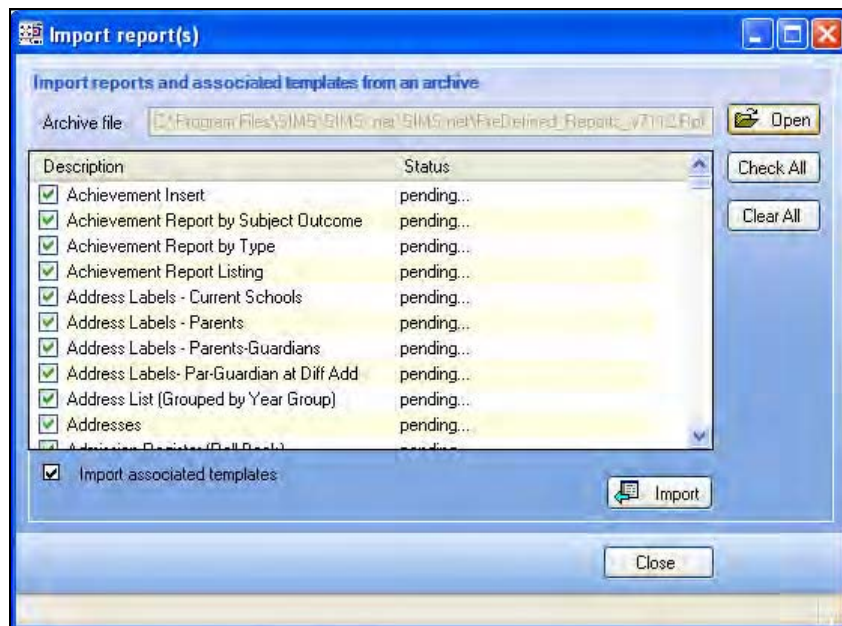
NOTE: Schools may find that teachers, who have a Teacher Number of eight digits, will have their Teacher Number truncated to seven digits and this may adversely affect the teacher's record. Schools should ensure that Teacher Numbers are obtained from the GTC to guarantee validity.

The SWC Spring Report has been provided as a pre-defined report. This enables the checking of staff contracts. The report can be printed and given to individual staff members so that they can check their own details are recorded correctly.

NOTE: The current RptDef file must have been imported after upgrading to the latest version of SIMS .net. This file contains all the up-to-date user defined report definitions provided by Capita Children's Services. Please see the following section for further information.

Importing Pre-defined Report Definitions

1. Select **Reports | Import** to display the **Import report(s)** dialog.
2. Click the **Open** button to display the **Select report file to import** dialog.
3. Navigate to the application folder, typically C:\Program Files\SIMS\SIMS .net and highlight the **Predefined_Reports_v7112.RptDef** file. The version number of the file name will increment each time an upgrade of SIMS .net is applied.



4. Click the **Open** button to return to the **Select report file to import** dialog. The file name and location are displayed in the **Archive file** field.

All pre-defined reports contained in the selected file are displayed in the dialog. However, you have the option to import selected reports only. If you do not wish to import a report, deselect the check box to the left of the **Description**.

If you do not wish to import the associated templates, deselect the **Import associated templates** check box.

5. Click the **Import** button. The status of the selected report(s) changes to **Imported**.
6. Click the **OK** button to complete the process and close the dialog.

All reports are stored on the Document Server. Imported reports are automatically stored in the appropriate \Focus folder (e.g. Student, Staff, Class, etc.) but can be copied to other folders if required (provided you have sufficient Permissions).

Pre-defined reports cannot be edited. However, users with appropriate permissions can delete reports.

Running the SWC Spring Report

1. Select **Reports | Run Report** to display the **Report Browse**.
2. In the report navigation tree, select **Focus | Staff | SWC Spring**.
3. Double-click the report name to collate the report.

This report captures all of the contracts that are valid for some or all of the period specified.

Green Abbey School										
Mrs Dawn Asher										
Given Name: Dawn Family Name: Asher										
Gender: F NINO: MW365527B Teacher No: Disability:			Date of Birth: 12 Feb 1968 Ethnicity: White Emp. Start: 20 Aug 1989				QTS: QTS Route: HLTA: F			
Previous name History										
Previous Surname								Date Changed		
Absences										
Start date	End Date	Days Lost	Category				Payroll Category			
Contracts Basic										
S. Term	Start	End	Origin	Destination	SWR Post	Emp. Type	FTE Hrs/Wk	Hrs/Wk	Wks/Yr	
Manual Staff	20 Aug 1989		Not known		Support Staff	Permanent	37.5000	20.0000	40.0000	
Contracts Pay										
S. Term			Payscale		Region		Point	Amount	Safeguarded Salary	
Manual Staff			Other		Rest of England		1.0	2653.7008	F	
Service Agreements										
Start Date	End Date	QTS Status	Reason	SWR Post	Type	Daily Rate	FTE Hrs/Wk	Hrs/Wk	Wks/Yr	
Allowances										
Allowance							Category		Amount	

Dealing with Unwanted Teacher/Support Staff Records

If there are teachers or support staff who have been entered in error (such as duplicates), it is recommended that you carry out the following actions in the records that are not required. This will ensure the duplicate records are not included in the School Workforce Census return.

- In **Focus | Staff | Employee Details**, ensure the **Eligible for SWR** check box is not selected.

Preparing School Level Information

Some additional school level data items are required for the School Workforce Census 2009 which will need to be checked in the school details area of SIMS .net via **Focus | School | School Details**. These include:

- School Type
- School Telephone Number

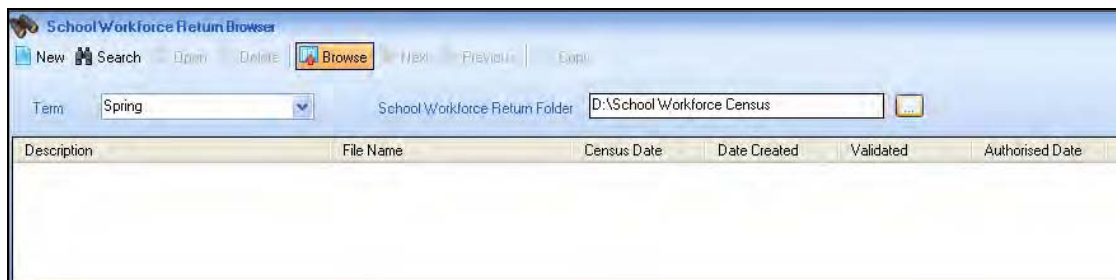
What Next?

If required, monitor any changes and update SIMS .net.

Carrying Out a Dry Run

Once the SIMS 2008 November Main Release has been installed, you can carry out one or more dry runs of the School Workforce Census. It is advisable to do this as early as possible, even if you know that your data has not yet been fully prepared or checked. The purpose of a dry run is to produce the **Validation Errors Summary** which will detail what corrections need to be made to your data.

1. To carry out a dry run, select **Routines | Statutory Returns | School Workforce Return** to display the **School Workforce Census Return Browser**.



2. Select an existing folder or specify a new location in which the School Workforce Census files will be stored in the **School Workforce Return Folder** field. You may wish to make this a temporary folder for the purposes of producing a dry run.

IMPORTANT NOTE: Careful consideration should be given to the location of the return folder, as it will contain sensitive information. You should be mindful of your school's responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a Server. The DCSF recommends ISO27001 as the standard for information security, a copy of which can be found at <http://www.itgovernance.co.uk/bs7799.aspx>. If you are in any doubt, you should consult with your IT Security Officer before proceeding.

3. Click the **New** button on the toolbar to create a new return. The **Schools Workforce Return Details** page is displayed.

Schools Workforce Census Details - New Return

Save Undo Validate Authorise Detail Report

1 Schools Workforce Census Details 2 School Information 3 Absent on Census Day 4 Vacancies 5 Occasional Teachers Information 6 Third Party Staff Count

1 Schools Workforce Census Details

Census Date: 15/01/2009 Schools Workforce Census Description: Spring Workforce Return 09

Workforce Return Type: Spring 2009

Absence Start Date: 01/01/2008 Absence End Date: 31/12/2008

Continuous Contracts Start Date: 01/09/2008 Continuous Contracts End Date: 31/12/2008

2 School Information

LA Number: 820 Establishment Number: 4321

School Type: Comprehensive all-through 11-18

School Phase: Secondary

School Name: Green Abbey School

School Detail Calculate All Details

3 Absent on Census Day

Staff Surname	Staff Forename	Staff Code	Absent On Census Day
Abell	Anita	AA	N
Andrews	Selina	SA	N
Asher	Dawn	DA	N
Atkinson	John	JA	N
Batchley	Andrea	ABY	N
Blacker	Adrian	AB	N
Brown	James	JB	N
Brown	Paul	PB	N
Burrows	Katie	KB	N

4. Enter a name for the dry run return in the **Description** field, such as **Test** (or any name that will clearly distinguish this dry run from actual returns that will be generated later).
5. Click the **Calculate All Details** button to extract the required information.
6. If there is any missing or invalid data on the screen, an error message will appear on the Status Bar.

 School E-mail Address is required.

This data must be corrected before attempting to validate the return.

7. Click the **Validate** button on the toolbar to validate the data.

When finished, a **Validation Errors Summary** panel is displayed listing the number of errors together with the **Type**, **Error Number**, **Error Message**, **Individual Data Item** and **Solution** for each error.

Print

Validation Errors Summary

Schools Workforce Census Validated - 268 Validation rules failed (Number of Errors - 262 and Number of Warnings - 6)

To resolve error : Double click in row to navigate to relevant screen

Type	Error Number	Error Message	Individual Data Item	Solution
F	6540	At least one staff record in this school's return should show		# Check Focus Person Staff for
F	4105	Teacher Number must be seven digits	Teacher Number: 60559162 Name: Blacke	# Go to Focus Person Staff and
F	4220	Ethnicity is invalid	Teacher Number: 60559162 Name: Blacke	# Go to Focus Person Staff and
F	4410	Post is missing	Teacher Number: 60559162 Name: Blacke	# Go to Focus Person Staff and
F	4220	Ethnicity is invalid	Teacher Number: 5995652 Name: Konchal	# Go to Focus Person Staff and
F	4160	Member of workforce with missing NI Number	Teacher Number: 5995652 Name: Konchal	# Go to Focus Person Staff and
F	4410	Post is missing	Teacher Number: 5995652 Name: Konchal	# Go to Focus Person Staff and
F	4220	Ethnicity is invalid	Teacher Number: 7932796 Name: Brown,	# Go to Focus Person Staff and
F	4150	NI Number has invalid format	Teacher Number: 7932796 Name: Brown,	# Go to Focus Person Staff and
F	4410	Post is missing	Teacher Number: 7932796 Name: Brown,	# Go to Focus Person Staff and
F	4220	Ethnicity is invalid	Teacher Number: 8576284 Name: Edward	# Go to Focus Person Staff and

- Use the scroll bars to see all of the errors/warnings.
- Double-click on any row to navigate to the appropriate record (where applicable). This will launch the specific area in SIMS .net where the record can be amended/corrected.
- Change the order of the summary by clicking on the appropriate column heading. If required, change the width of the columns by dragging the dividing line between the column headings until the required size is achieved.
- Filter on the Error Number by clicking the drop-down arrow and selecting the required number from the list and then click the **Search** button.
- Print the summary by clicking the **Print** button, noting that a high number of errors will generate a high number of printed pages.

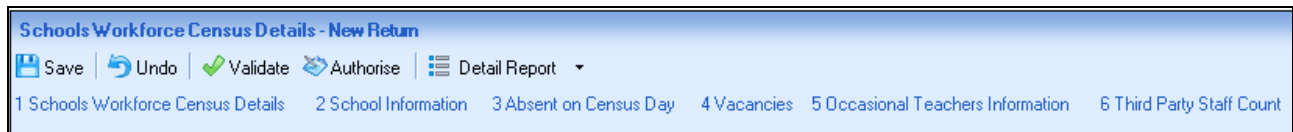
The errors listed will be displayed until they are corrected and the validation routine is run again.

In addition to the **Validation Errors Summary**, a document has been produced containing a list of the errors/queries that can be generated including explanations and information on how to resolve the error (or in fact, whether the error can be ignored). In addition, the document helps to identify the order in which errors should be corrected.

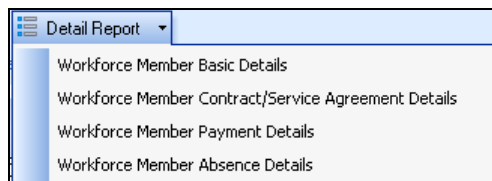
The School Workforce Census 2009 Errors and Resolutions document is available on SupportNet. Enter **SWCENSUS** in the **Site Search** field on the **Home** page and then click the **Go** button to find the latest version.

Producing a Detail Report

It is now possible to produce a detail report showing basic staff data, exclusions and/or attendance data. These reports enable the checking of the data used to generate the School Workforce Census return and can be produced once the School Census return has been validated.



1. From the **Schools Workforce Return Details** panel, click the **Detail Report** down-arrow and select the required report from the drop-down menu, e.g. **Workforce Member Basic Details**.



2. The required report is displayed in the Internet browser as shown in the following example:

Schools Workforce Census Spring - 2009 (Workforce Member Staff Basic Details)

Filename: 8204321_SW1_820LL09_001.UNA

Teacher Number	Forename	Surname	Former Surname	NI Number	Gender	DOB	Ethnicity	QT Status	HLTA Status	QTS Route	Disability	Absent on Census Day
8482693	Anita	Abell	-	BC172692B	F	11-02-1963		Yes	No	-	Information not yet obtained	N
7132865	Selina	Andrews	-	WE340235A	F	13-12-1955		Yes	No	-	Information not yet obtained	N
-	Dawn	Asher	-	MW365527B	F	12-02-1968		-	No	-	Information not yet obtained	N
-	John	Atkinson	-	WL300044D	M	01-08-1969		Yes	No	-	Information not yet obtained	N
-	Andrea	Batchley	-	NJ652736A	F	21-03-1965		-	No	-	Information not yet obtained	N

TIP: If required, the information can be copied and pasted into Excel for further manipulation, e.g. column sorting, etc.

Producing the School Workforce Census 2009 Return

If required, monitor any changes and update SIMS .net.

You should now be ready to produce the final School Workforce Census return. For specific instructions, please see the *Producing the School Workforce Census Spring Return 2009* which can be accessed by clicking **Other Handbooks** in the **Documentation** panel in SIMS .net. A comprehensive online help system is available within SIMS .net. To access the help, click the **Help** button whilst in the Census area.

Where Can I Get More Information?

- A variety of documentation is being provided to assist you with the production of the School Workforce Census 2009 return (including user handbooks, online help, etc.). If necessary, these documents will be updated as required and new documents added. It is, therefore, recommended that you regularly check SupportNet for any new or updated documents by entering **SWCENSUS** in the **Site Search** field on the SupportNet **Home** page and then click **Go**.
- The Service Desk provide a dedicated website listing all the available documentation together with all related solutions and any other useful resources. The website can be accessed at the following address:
<http://support.capitaes.co.uk/hottopics>

Once open, select the required topic from the list.

- The Teachernet website also contains preparation and guidance documentation that may be of interest and can be found at the following address:

<http://www.teachernet.gov.uk/management/ims/datacollections/>

*NOTE: Please check SupportNet on a regular basis for any further documentation (by entering **SWCENSUS** in the **Site Search** field on the **Home** page), especially leading up to the School Workforce Census return date.*
