

Maintaining Lookups in SIMS

There is a large number of lookups already defined within SIMS. Predominantly, these are specified by the DfE and Capita SIMS. These lookups are presented as a list of options when selecting from various drop-down lists throughout SIMS.

Some lookups consist of a category and one or more values. The category identifies the nature of the lookup and the value(s) further identify an attribute within that category, e.g. **Dietary Needs** is a category whilst **GLUT - Gluten Free**, is a value within that category.

Lookup values are available from many of the drop-down lists in SIMS, e.g. the **Title** lookup contains values such as **Mr, Mrs, Miss, Ms**, etc. It is possible to add values that do not currently exist and/or remove values that are not used or are not applicable to your school. The order in which the lookup values are displayed can be edited so that the most frequently used values are displayed at the top of lists throughout SIMS, facilitating selection.

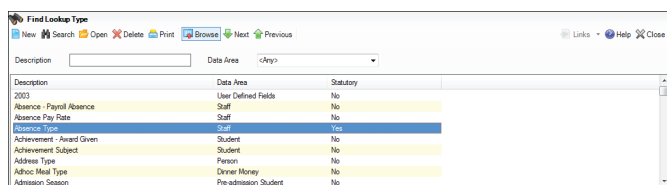
Four types of lookup are available. Schools can add values to **Standard** and **Statutory with Category** type lookups only:

- **Standard** - fully editable by users.
- **Statutory (fixed)** - defined by the DfE, WG and DENI. Cannot be edited.
- **Statutory with Category** - defined by the DfE, WG and DENI. Values can be added as long as they are linked to a category.
- **System** - required by SIMS and are not editable.

Always check with your LA before making changes to lookups. Some authorities provide a standard set of lookup values for their schools to use.

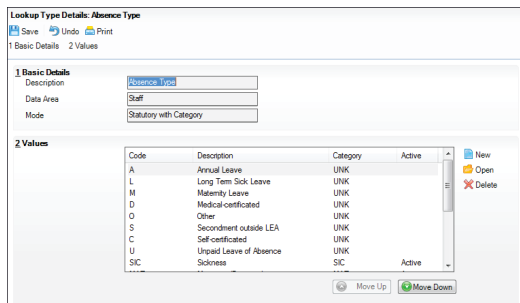
Adding/Editing Lookup Values

1. Select **Tools | Lookups | Maintain** to display the **Find Lookup Type** browser then click the **Search** button to display the current lookups.



The lookups are displayed in alphabetical order. To sort by the **Data Area** to which they relate, click the column heading.

2. Highlight the required lookup then click the **Open** button to display the **Lookup Type Details** page.



3. Click the **New** button in the **Values** panel to display the **Add/Edit Lookup Value** dialog. Alternatively, to edit an existing value, highlight it then click the **Open** button.

4. Enter the **Code** for the lookup value, ensuring it is unique. The **Code** is not displayed elsewhere in SIMS.

5. Enter a meaningful **Description**.

NOTE: This is the text that is displayed in the drop-down lists in SIMS.

6. Select the required **Category** from the drop-down list.

7. Ensure that the **Active** check box is selected so that the lookup value is available for selection once saved. Lookup values can be made inactive by deselecting this check box.

NOTE: SIMS must be restarted for the change to be affected.

8. Click the **OK** button.

9. Repeat steps 3 to 8 to add any other new values then click the **Save** button.

*NOTE: Editing existing lookup values changes any records that currently use this lookup value. For example, changing the value of the **Title** lookup of **Father** to **Fr** replaces the use of **Father** in a person's title to **Fr**.*

Adjusting the Display Order of Lookup Values

To change the order in which lookup values are displayed in drop-down lists:

1. Highlight the value you want to move then click the **Move Up** or **Move Down** button to achieve the correct display order.
2. Repeat this process until all lookup values are displayed in the required order.
3. Click the **Save** button.

Adding/Editing a Medical Event Lookup Type

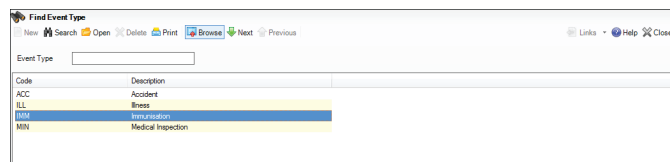
There are already a number of pre-defined medical events associated with the **Medical Event Type** lookup, but these are not exhaustive and it is quite likely that your school will need to define its own selection of illnesses, accidents and immunisations.

The **Medical Event Type** is defined as a standard lookup and enables you to add, amend or augment the values already available. For example, the MMR immunisation may be required as a value of the **Immunisation Medical Event Type**.

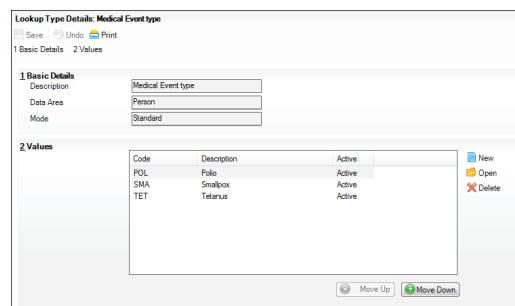
IMPORTANT NOTE: Caution should be taken when adding, editing or deleting Medical Event Lookup Types.

1. Select **Tools | Maintain Medical Event** to display the **Find Event Type** browser.

2. Enter the description of the **Event Type** you wish to search for, if known, then click the **Search** button to display a list of existing medical event types that match the search criteria entered.

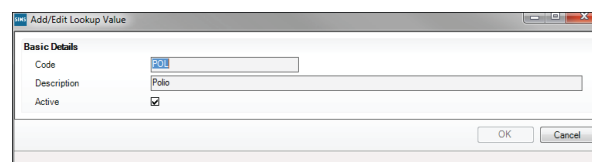


3. Highlight an existing value then click the **Open** button to display the **Lookup Type Details** page.



The information displayed in the **Basic Details** panel is read-only.

4. Click the **New** button adjacent to the **Values** panel to display the **Add/Edit Lookup Value** dialog.



5. Enter a unique **Code** and **Description** for the new lookup **Value**.
6. The **Active** check box is selected by default. If you do not want the lookup value to be in use immediately, deselect this check box.
7. Click the **OK** button to save the details.

Maintaining Lookups in SIMS

Importing Lookups and Lookup Values

IMPORTANT NOTE: To import lookups and lookup values, you must be a member of the School Administrator user group in System Manager.

There may be occasions when your Local Authority supplies a set of lookups that they want all of their schools to use, such as a specific set of language codes for the **First Language** drop-down list. One or more lookups can be supplied in a single file, either in .ZIP or .XML format.

Once the file has been received, ensure that the file and its associated signature file are saved to a known location on your PC.

NOTE: The XML and signature files must be saved to the same location.

Each Capita SIMS Base Lookups archive file contains a number of lookup files with region specific variations. To ensure that the files applicable to your school are imported, you may need to run the import process more than once.

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

2. Click the **Select File** button to display the **Open** dialog then navigate to the location of the stored lookup file.
3. Highlight the required file then click the **Open** button.

The **Lookups present in the file** and **Lookup values present in the file** panels are populated automatically.

4. Click the **Import** button to import the file.

If the file is imported successfully, a message is displayed at the bottom of the page.

NOTE: The new lookups are available for use once SIMS has been restarted.

If any errors are encountered during the import, they are displayed in the **Exception Log** panel. A copy of the errors can be saved and/or printed before forwarding the information to your LA for further advice.

NOTE: If a lookup fails to import, it does not prevent the other lookups in the file from being imported.

Configuring Ethnic Codes

Ethnic information may be recorded against a pupil/student at any stage from when they are recorded as an applicant or pupil/student to the point when they leave your school. Schools have an obligation to update and maintain this information over this period of time.

The DfE may introduce changes to the ethnic category codes by introducing new types, withdrawing previously included types and changing existing ones. School Administrators may need to change student ethnicity information to comply with the latest DfE requirements.

A pre-defined list of Ethnic Codes will be supplied by your LA. This ensures that all schools under the LA's jurisdiction use the same agreed codes that are appropriate for your usual pupil/student intake.

The Ethnic Codes will be compiled by the LA into a text file (.TXT) to facilitate the import.

1. Select **Tools | Lookups | Configure Ethnic Codes** to display the **Configuration of Ethnic Codes** page.

2. Click the **Open** button adjacent to the **Select file to Import** field to display the **Select text file to import** dialog.



Open button

3. Navigate to the location of the stored `Ethnic.txt` file that was supplied by your LA, highlight it then click the **Open** button.
4. Click the **Configure** button to import the ethnic codes contained in the text file.

Additional Information

For more information regarding lookups, the following handbook and tutorials can be accessed by clicking the **Documentation** button on the **SIMS Home Page**.

- *Setting up and Administering SIMS* handbook
- *Importing Lookups* tutorial
- *Maintaining Existing Lookups* tutorial.

Did you know?

In SIMS, communications with any interested parties regarding a behaviour incident are known as interventions. To help with the recording of these communications, the **Intervention Type** lookup is available.

Many of the lookups used when behaviour information is entered can be edited to meet the needs of your school. It is worth spending time reviewing these lookups and if necessary, removing any unwanted values, de-activating values (so that they are not visible, but they can be re-activated in the future if required) or adding new values. Restricting the list of options is likely to provide more valuable analysis information.

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This guide is based on the version of the software (7.150) in use at the time of publication.