SIMS

Administering and Registering Candidates for Exams

applicable to 7.180 onwards

Handbook

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C| Contents

01| Introduction 1
Overview 1
What's New in this Release? 1
Enhancements to External Results Manual Entry Dialogs 1
Where to Find More Information 1

02| Administering Internal Candidates 3
Selecting Potential Candidates for Examinations 3
Understanding Examination Numbers 3
Generating Examination Numbers 4
Tidying Examination Numbers 5
Tidying Examination Numbers for Candidates with Entries but No Results 7
'Unfreezing' Examination Numbers 8
Understanding the Unique Candidate Identifier (UCI) 9
How the UCI is Generated 9
Generating the Unique Candidate Identifier.................................... 9
Adding Internal Candidates 11
Viewing/Editing Internal Candidate Details.................................. 13
Viewing Personal, Year and Reg Group Details 14
Viewing Examination Details.. 14
Editing a Candidate's Exam Name 14
Setting Qualifier Flags 15
Managing Examination Entries and Forecast Grades for Internal Candidates 16
Transferring the Candidate Status from Internal to External 19
Deleting Internal Candidates 19

03| Administering External Candidates........................... 21
Selecting Potential Candidates for Examinations 21
Adding External Candidates 21
Searching for an Existing Person 23
Adding a New Person 23
Viewing/Editing External Candidate Details 24
Viewing/Editing Personal Details... 25
Viewing/Editing Address and Contact Details 26
Viewing Examination Details.. 28
Editing a Candidate's Exam Name 28
Setting Qualifier Flags 29

Managing Examination Entries and Forecast Grades for External Candidates 30
Transferring the Candidate Status from External to Internal 33
Deleting External Candidates 33

04| Entering Data Using an OMR 35

Quick Start 35
Introduction 35
OMR Templates 36
OMR Sheets 36
Marking OMR Sheets 37
Result Date, Result History and Result Sets 38
Creating OMR Sheets at the Same Time as a Template 38
Creating OMR Sheets Using Existing Templates 43
Printing and Deleting OMR Sheets 47
Printing OMR Sheets 48
Deleting OMR Sheets 48
Reading OMR Sheets 49
Editing Results Entered via the OMR 50

05| Registering Candidates for Examinations 51

Introduction 51
What are Aspects? 52
What are Marksheets? 52
What are Templates? 52
Creating Marksheets at the Same Time as a Template 52
Creating Marksheets Using Existing Templates 57
Batch Creation of Marksheets 59
Adding and Entering Data in Marksheets 62
Navigating Around the Marksheet 62
Selecting a Value for a Column 62
Entering Grades, Forecast Grades and Marks for Individual Candidates 66
Restoring Saved Column Values 67
Viewing the Properties of a Column 68
Restoring the Original Column Order 68
Clearing the Contents of a Column 68
Copying and Pasting Data 68
Copying a Single Cell 69
Copying an Entire Column 69
Adding Notes 69
Changing the Display Order 69
Changing the Column Width 70

Printing and Exporting Marksheets 70
Previewing Marksheets 70
Printing Marksheets 71
Exporting Marksheet Data 71
Deleting Marksheets 72
Deleting Multiple Marksheets 72

06| Creating Submission and Amendment Files 75
Introduction 75
Generating a Submission File 75
Selecting a Submission File Type 80
Submitting Entries 80
Submitting Forecast Grades 81
Submitting Coursework Marks 81
Submitting Amendments 82
Tidying EDI Folders 83

07| Organising Examination Seating 85
Booking Rooms for Examinations 85
Adding/Editing a Component Sitting 86
Viewing/Selecting the Candidates for the Component Sitting88
Removing Candidates from a Component Sitting 88
Viewing the Candidates Selected for a Sitting 89
Making Special Arrangements for Candidates 90
Changing Special Arrangement Details 92
Making a Candidate Eligible for Special Arrangements.......... 92
Allocating Additional Time to a Candidate with Special Arrangements 94
Viewing the Additional Time Allocation in Examinations Organiser Reports 96
Activating and De-Activating Seats 97
Generating a Seating Plan 98
Seating Individual Candidates 101
Dealing with Clashes 101
Understanding the Clash Status 102
Viewing Potential Clashes 102
Viewing Existing Commitments for a Candidate 103
Removing an Examination Booking from a Room 104
Seating Unit Tests 104

08| Manually Recording External Exam Results with a QN109
Entering and Editing External Examination Results 109
Searching for the Required Students 109
Manually Recording External Exam Results with a QN 110

Viewing or Editing an External Exam Result 112
Deleting an External Exam Result 112
Differences Between the Edit PI Data and External Results Routines 113

09| Producing Reports 115
Introduction 115
Viewing Reports 116
Changing the Orientation of the Report 116
Zooming In and Out of the Report 116
Printing Reports 116
Exporting/Saving Report Data 117
Importing a CSV File into Microsoft Excel 117
Disallowed Combinations Report 121
Producing Entries Reports 121
Statement of Entry Report 121
Candidate Fees Payable Report 123
Examination Entry Lists Report 125
Exam Entry Costs and Totals Report 126
Individual Candidate Timetables (Default) Report 127
Amendment Audit Trail Report 128
Producing Candidate Labels 129
Candidate Labels 130
Candidate/Components Labels 130
Producing the Candidate Report 132
Linear Integrity Check Report 133
Producing Seating Organiser Reports 133
Summary Examination Timetable Report 134
Exam Room Usage Report 134
Seating Plans Report 135
Examination Registers Report 137
Individual Candidate Timetables Report 138
Candidate Special Arrangements Report 139
Running the Component Sitting Integrity Report 143
Components with Incomplete Seating Report 144
Unseated Candidates Report 145
Resolved Clashes Report 146

10| Additional Information 147
How an Optical Mark Reader Works 147
Setting Up an Optical Mark Reader 148
OMR Printing Page 149
OMR Port Settings Page 150

Changing Sensitivity and Discrimination Settings 151
Unable to Handshake with OMR 152

Glossary 155

Index 159

01 | Introduction

Overview 1
What's New in this Release? 1
Where to Find More Information 1

Overview

This handbook has been created to provide you with all the relevant information that you need to administer and register internal and external candidates for an Exams season.

It also explains how you can enter student data using an Optical Mark Reader, create submission and amendment files, arrange the seating for examinations and produce a number of useful reports in a variety of formats.

What's New in this Release?

A number of additional features and enhancements have been provided for this release.

Enhancements to External Results Manual Entry Dialogs

Tools | Examinations | External Results Manual Entry

Cosmetic enhancements have been made to the **Add External Exam Result** and **Edit External Exam Result** dialogs.

More Information:
Manually Recording External Exam Results with a QN on page *110*

Where to Find More Information

Online help can be accessed by pressing **F1** or clicking the applicable **Help** button in SIMS.

A wide range of documentation is available from the SIMS **Documentation Centre**, including handbooks, quick reference sheets and tutorials. Click the **Documentation** button located on the top right-hand side of the SIMS **Home Page**, select the required category and then select the document you require.

The following additional handbooks for Examinations Organiser are available from the **Documentation Centre**:

- *Preparing Examinations Organiser for an Exams Season*
- *Guide to Importing and Structuring your Basedata*
- *Setting Up Domestic Exams in Examinations Organiser*
- *Using the Unit Seating Wizard in Examinations Organiser*
- *Guide to Importing and Analysing Examination Results*

- *Processing Results and Calculating PI Data in Exams and SIMS (Welsh specific and general versions)*.

02| Administering Internal Candidates

Selecting Potential Candidates for Examinations 3
Understanding Examination Numbers 3
Generating Examination Numbers 4
Tidying Examination Numbers 5
'Unfreezing' Examination Numbers 8
Understanding the Unique Candidate Identifier (UCI) 9
Generating the Unique Candidate Identifier 9
Adding Internal Candidates 11
Viewing/Editing Internal Candidate Details 13
Managing Examination Entries and Forecast Grades for Internal Candidates 16
Transferring the Candidate Status from Internal to External 19
Deleting Internal Candidates 19

Selecting Potential Candidates for Examinations

Internal candidates are students who are on-roll at your school and who may potentially be sitting examinations in a specific examination season.

The candidates taking the examinations must be associated with each season. For internal candidates, you will need to identify the students that you expect to be potential candidates for examinations. This is achieved by selecting required groups of students from your SIMS system, e.g. Year 10, Year 11, etc.

Once a student has been selected within the appropriate season, Exam and UCI numbers can be assigned and the student entered for the examination(s). Once the entries have been finalised, you can create a submission file and send this file to the appropriate examination board.

At the time of making entries to the examination boards, the list of potential candidates is reviewed and each candidate entered for one or more examinations is included in the entry file.

Understanding Examination Numbers

Examination boards require all candidates to have a unique number by which they can be identified. The user can input the number manually or allow the module to allocate numbers automatically.

1. Exams Numbers must <u>not</u> be modified if an entry has been made to any board for any open season using the existing number.
2. The number should consist of a 4 digit number.
3. External candidates could be numbered as if their cohort was the year that had just left.

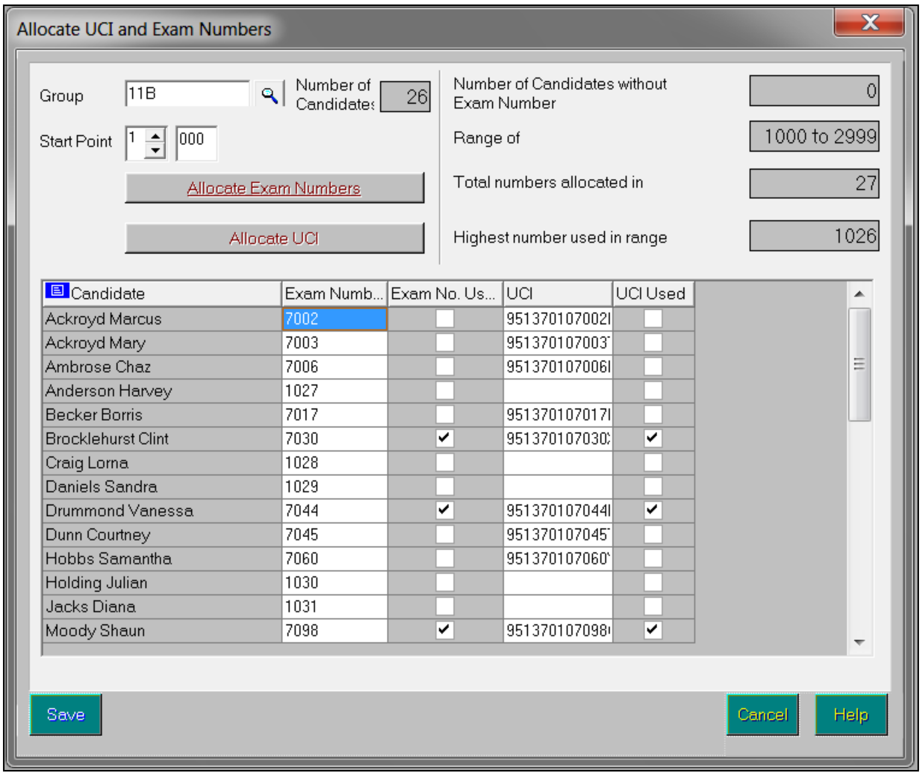
Once assigned, you should use this number when entering a candidate for any examinations offered by any other examination board.

The Exam Number must be assigned before the UCI can be assigned.

Generating Examination Numbers

Examination boards require all candidates to have a unique number by which they can be identified. It is not possible to assign Exam Numbers to individual candidates automatically. The user can input the number manually or allow the module to allocate numbers automatically (please see *Understanding Examination Numbers* on page *3*).

1. Select **Tools | Allocate UCI & Exam Numbers** to display the **Allocate UCI and Exam Numbers** dialog.



2. Select the required **Group** of candidates by clicking the **Field Browser** button.

   Once selected, the **Number of Candidates** field displays the number of candidates in that group.

3. Select the **Start Point** from which the Exam Numbers will commence.

   The list box at the bottom of the screen displays the name and details of each candidate in the group. These details include the Exam and UCI numbers (if they have already been assigned) and whether either number has been used (i.e. the numbers have been registered with the examination board by making a submission using these numbers).

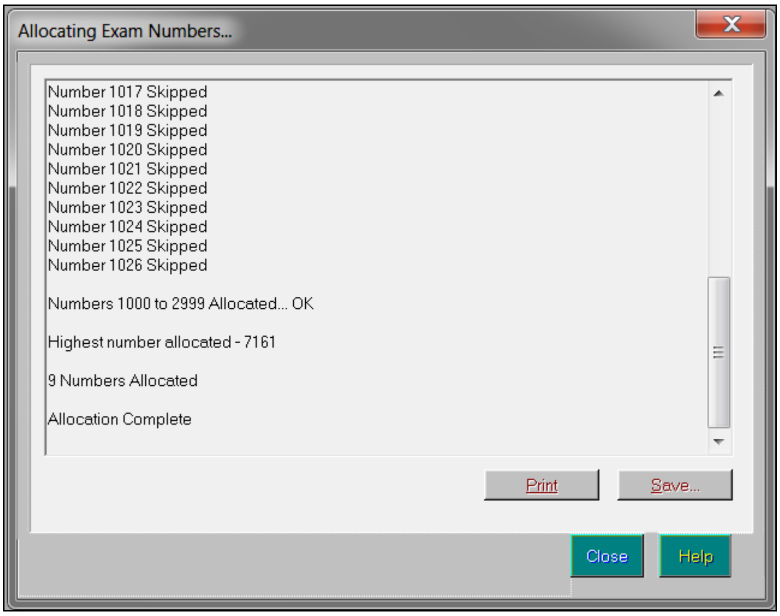
   If you are assigning numbers for use in domestic examinations, and you opt to do it in Registration Group order with a view to annual re-allocation, you should be careful not to select the **Exam No. Used** check box manually. Once selected and saved, it cannot be reversed.

IMPORTANT NOTE: *Examination numbers are assigned only to candidates who do not already have an Exam Number.*

The right-hand side of the dialog displays the **Number of Candidates without Exam Number**, the **Range of Numbers** in use, **Total numbers allocated in range** and the **Highest number used in range**.

4. Click the **Allocate Exam Numbers** button to allocate these numbers based on the information displayed on screen.

   The **Allocating Exam Numbers** dialog displays a summary of the process, together with a message when the process has completed.



5. Click the **Close** button to complete the process.

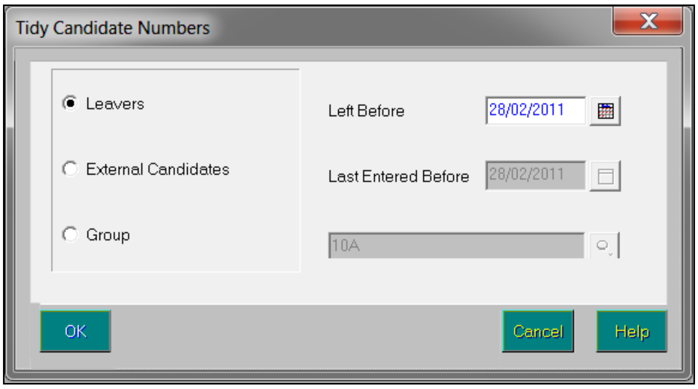
   You can subsequently amend an Exam Number in the **Allocate UCI and Exam Numbers** dialog.
6. Click the **Save** button.

Tidying Examination Numbers

This routine can be used to remove Exam Numbers from candidates who left your school more than one year ago, together with Exam Numbers for external candidates who last appeared more than a year ago or for a group of candidates.

If a member of a selected cohort is still on-roll or associated with an open season, it is not possible to remove their Exam Number. Only one radio button can be selected at a time. To remove another set of candidates, select the menu route again and proceed accordingly.

1. Select **Tools | Tidy Exam Numbers** to display the **Tidy Candidate Numbers** dialog.



2. If you want to tidy Exam Numbers for candidates who have left your institution, select the **Leavers** radio button.

   Click the **Calendar** button adjacent to the **Left Before** field to select the required date. Any candidates who still have Exam Numbers assigned, but left before this date, will have their Exam Numbers removed. The date defaults to exactly a year prior to the current system date.

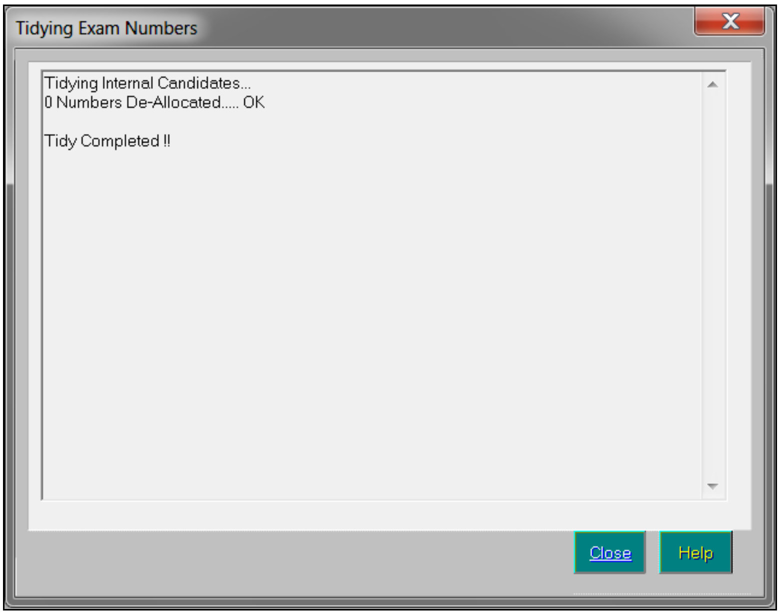
3. If you want to tidy Exam Numbers for all external candidates, select the **External Candidates** radio button.

   Click the **Calendar** button adjacent to the **Last Entered Before** field to select the required date. Any candidates who were not entered for an examination after this date will have their Exam Numbers removed. The date defaults to exactly a year prior to the current system date.

4. If you want to tidy Exam Numbers for a group of candidates, select the **Group** radio button. Candidates in a year group who have been assigned candidate numbers purely for the processing of domestic Exams, can have their numbers cleared by this route ready for reassignment for the next academic year.

   Click the **Field Browser** button adjacent to the radio button and select the required group from the drop-down list.

5. Click the **OK** button.



A message is displayed once the process has completed successfully.

6. Click the **Close** button to complete the process.

Tidying Examination Numbers for Candidates with Entries but No Results

It is not possible to tidy Exam Numbers for candidates who have been entered for an examination but where no corresponding result has been recorded. If you want to tidy Exam Numbers under these circumstances, you must carry out the following process:

1. Select **Focus | Change Current Season** to display the **Change Current Season** browser.
2. Highlight the last season in which the candidate(s) were presented and click the **Select** button.

> *NOTE: You can also change the current season at any time by clicking the season name and selecting the required season from the* ***Change Current Season*** *browser.*

3. Select **Tools | Allocate UCI & Exam Numbers** to display the **Allocate UCI and Exam Numbers** dialog.
4. Click the **Field Browser** button adjacent to the **Group** field and select the **All** candidate group for the season from the drop-down list (e.g. **Summer Exams 201n All**).
5. From the candidate list, click the **Exam No. Used** check box for the candidate whose Exam Number you want to recycle. If the selected candidate has examination entries in the selected season but no corresponding examination results, the following message is displayed:

   This Candidate has n entries without associated results. Are you sure you wish to proceed?

6. If you are certain that no future results import will be compromised by the removal of the Exam Number (e.g. the candidate left your establishment two years ago), click the **Yes** button.

   The **Exam No. Used** check box is deselected for the candidate and the Exam Number can now be deleted.
7. Select **Tools | Tidy Exam Numbers** to display the **Tidy Candidate Numbers** dialog.
8. Select the required parameters and click the **OK** button to display the **Tidying Exam Numbers** dialog.

   A message is displayed once the process has completed successfully.
9. Click the **Close** button to complete the process.

‘Unfreezing’ Examination Numbers

It is possible to edit a candidate’s Exam Number manually, even if you have already used this number in correspondence with an examination board.

Originally, it was not possible to edit a candidate’s Exam Number once it had been submitted to an examination board, but the rules surrounding this have been relaxed in Examinations Organiser. This is particularly useful if your school has recently merged and you need to re-allocate a batch of Exam Numbers.

1. Select **Tools | Allocate UCI & Exam Numbers** to display the **Allocate UCI and Exam Numbers** dialog.
2. Select the required **Group** of candidates by clicking the **Field Browser** button.

    *Field Browser button*

   Any candidate whose Exam Number has been assigned and has been submitted to an examination board will display a tick in the **Exam No. Used** column.
3. Deselect the check box of the candidate(s) whose number you wish to unfreeze.

   IMPORTANT NOTE: *If you attempt to carry out this process after submitting an entries file to an examination board and before receiving the results from the examination board, a message is displayed informing you of the number of affected entries and asking if you wish to continue. Click the **Yes** or **No** button, as appropriate.*
4. Click the **Save** button.

   Once the Exam Numbers have been ‘unfrozen’, open the **Allocate UCI and Exam Numbers** dialog again and enter any Exam Numbers manually, or click the **Allocate Exam Numbers** button to generate them automatically.

Understanding the Unique Candidate Identifier (UCI)

Each candidate beginning a course should be allocated a 13 character unique identifier, unless the candidate already has a UCI. The candidate will retain this identifier throughout the course.

Once the UCI has been generated, it must be used for all specifications entered with the examination board or any other examination board and for all examinations at any examination Centre.

> *NOTE: Each candidate must have only one UCI.*

The UCI is used for:

- entries and results for individual units/components
- entries and results for subject awards
- certificates.

It is essential for candidates moving from one centre to another to know their UCIs, particularly if they are continuing courses at a new centre. The UCI is quoted on results documentation.

How the UCI is Generated

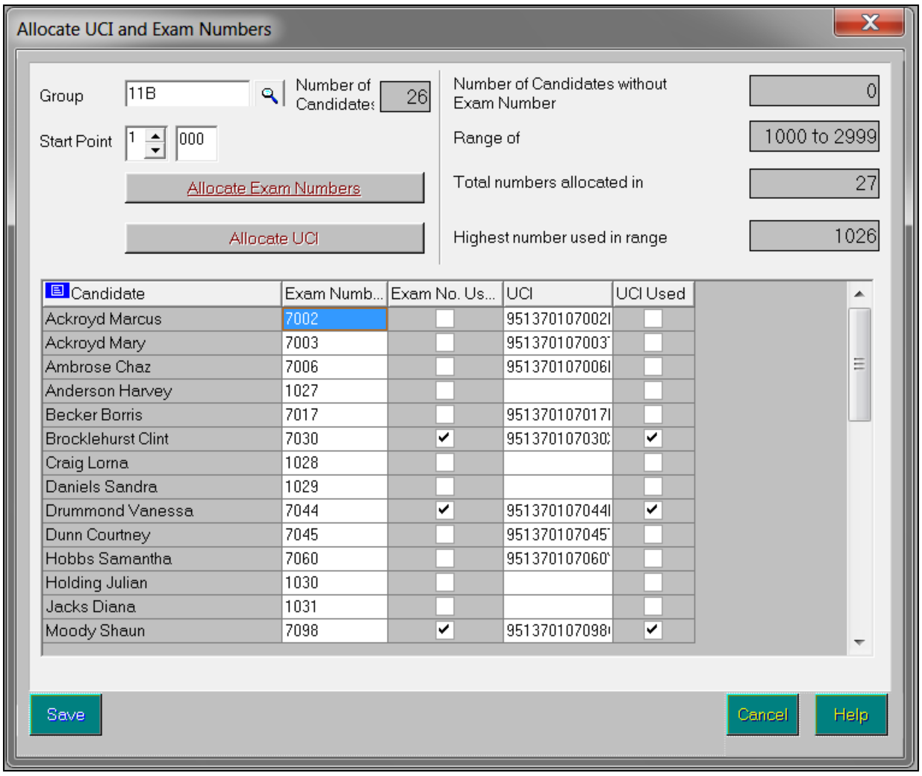
The UCI consists of 13 characters:

- Centre number (5 digits) - the number of the centre where the candidate took their first unit. Candidates moving to different centres part-way through the course will retain their original UCI.
- Board Identifier (1 digit) - usually set to zero.
- Academic year of registration (2 digits) - the academic year in which the candidate enters for the first unit.
- Candidate serial number (4 digits) - this is under your control and must be in the range 0001 to 9999 and for any year of registration, there must be no duplicates. In subsequent years, when new candidates are entered with a new year of registration, serial numbers may be re-used.
- Check character (1 digit) - this is automatically generated. It provides a useful means of validation to ensure that no mistakes have been made when providing the other characters in the identifiers.

Generating the Unique Candidate Identifier

Each candidate beginning a course should be allocated a 13 character unique identifier, unless the candidate already has a Unique Candidate Identifier (UCI). This could be where they have previously taken a GCSE modular syllabus. The candidate retains this identifier throughout the course (please see *Understanding the Unique Candidate Identifier (UCI)* on page *9*).

1. Select **Tools | Allocate UCI & Exam Numbers** to display the **Allocate UCI & Exam Numbers** dialog.



2. Select the required **Group** of candidates by clicking the **Field Browser** button.

   Once selected the **Number of Candidates** field displays the number of candidates in that group.

   The list box at the bottom of the screen displays the name and details of each candidate in the group. These details include the Exam and UCI numbers (if they have already been assigned) and whether either number has been used (i.e. the numbers have been registered with the examination board by making a submission using these numbers).

   > *NOTE: A UCI number is only assigned to candidates who do not already have a UCI Number.*

   The right-hand side of the form displays the **Number of Candidates without Exam Number**, the **Range of Numbers** in use, **Total numbers allocated in range** and the **Highest number used in range**.

3. Click the **Allocate UCI** button to allocate these numbers based on the information displayed on screen.

   The **Allocating UCI Numbers** dialog displays a summary of the process, together with a message when the process has completed.

4. Click the **Close** button to complete the process.

   You can subsequently amend a UCI number in the **Allocate UCI and Exam Numbers** dialog.

5. Click the **Save** button.

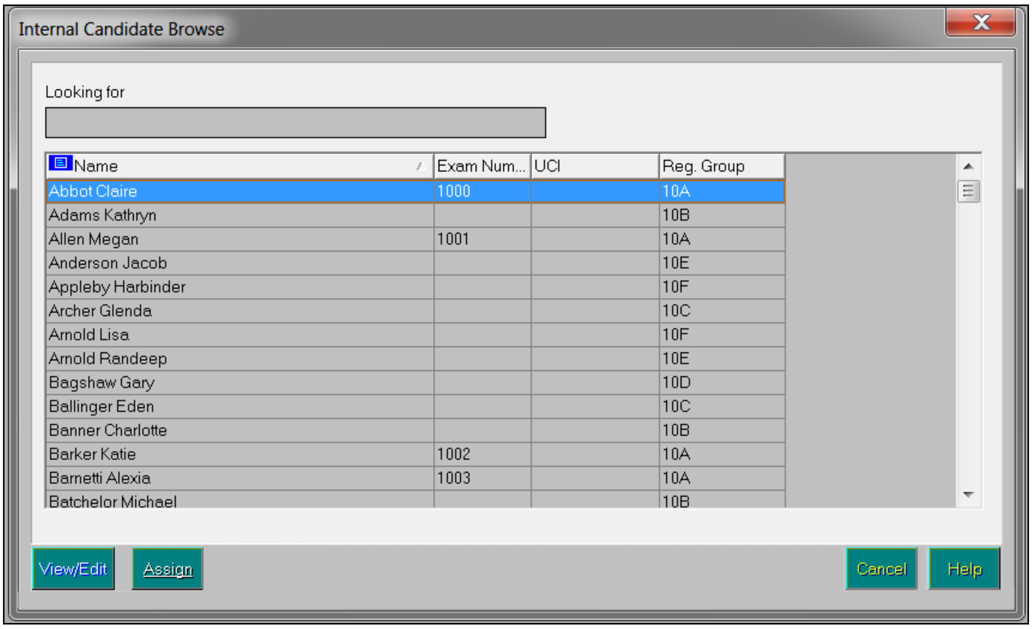
Adding Internal Candidates

For a person to be considered for taking an examination, they must first be recognised as a **Candidate** in Examinations Organiser.

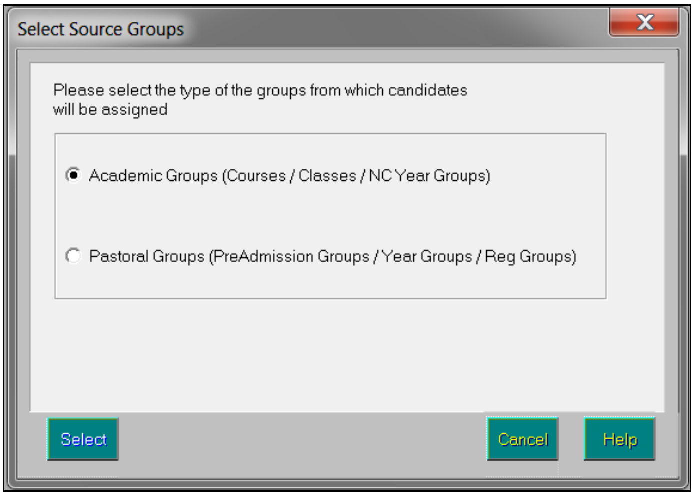
Registering a person as an internal candidate consists of associating them with a season and allocating both an Exam Number and a UCI number. These details are displayed in the **Registration** panel of the **Student Details** page in SIMS.

NOTE: You cannot add internal candidates if the season is locked or closed.

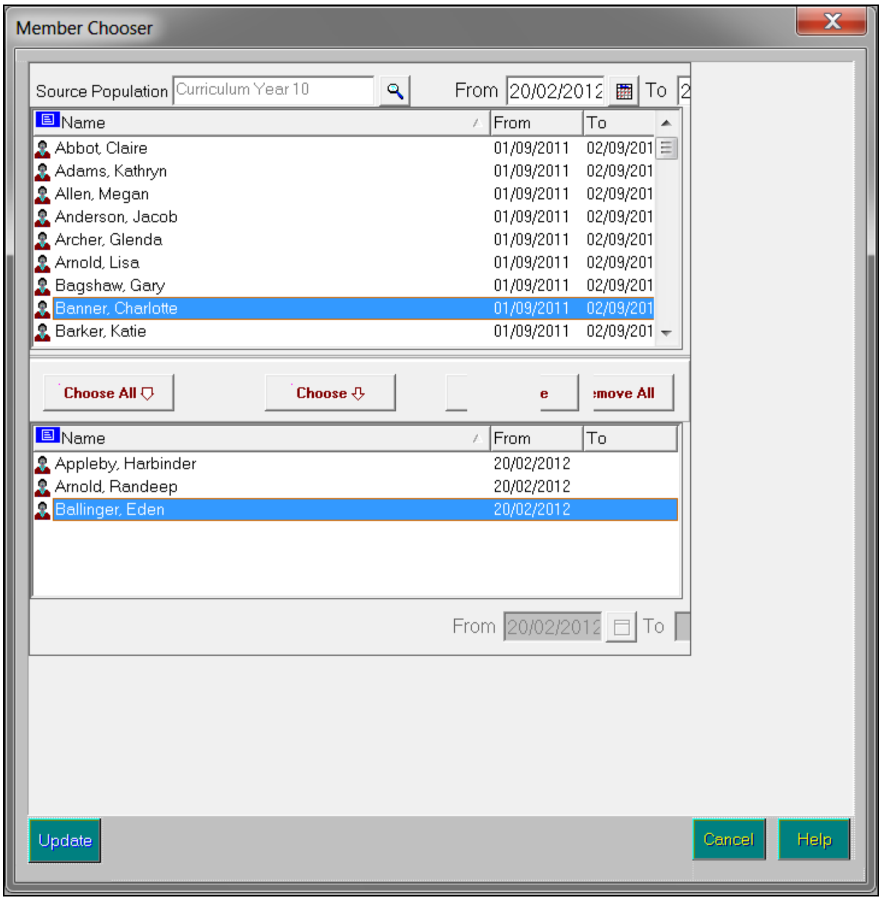
1. Select **Focus | Candidates | Internal** to display the **Internal Candidate Browse** dialog.



2. Click the **Assign** button to display the **Select Source Groups** dialog.



3. Click the relevant radio button to select the type of groups from which the candidates will be assigned, **Academic Groups (Courses/Classes/NCYear Groups)** or **Pastoral Groups (PreAdmission Groups/Year Groups/Reg Groups)**.
4. Click the **Select** button to display the **Member Chooser** dialog.



5. Click the **Source Population** browser button and select the required group. You can also specify the **From** and **To** dates by clicking the respective **Calendar** button.

   The top panel of the **Member Chooser** is populated with the names of the candidates in the selected group.
6. Select the required candidates by double-clicking their names or highlighting their name and clicking the **Choose** button. Multiple candidates can be selected by holding down the **Ctrl** key and clicking each candidate name, then clicking the **Choose** button. Select all the candidates by clicking the **Choose All** button.
7. If you make a mistake in your selection, highlight the candidate's name in the bottom pane and click the **Remove** button. Alternatively, click the **Remove All** button and begin your selection again.

   All selected candidates are displayed in the bottom pane of the **Member** chooser.
8. Click the **Update** button to return to the **Internal Candidate** browser.

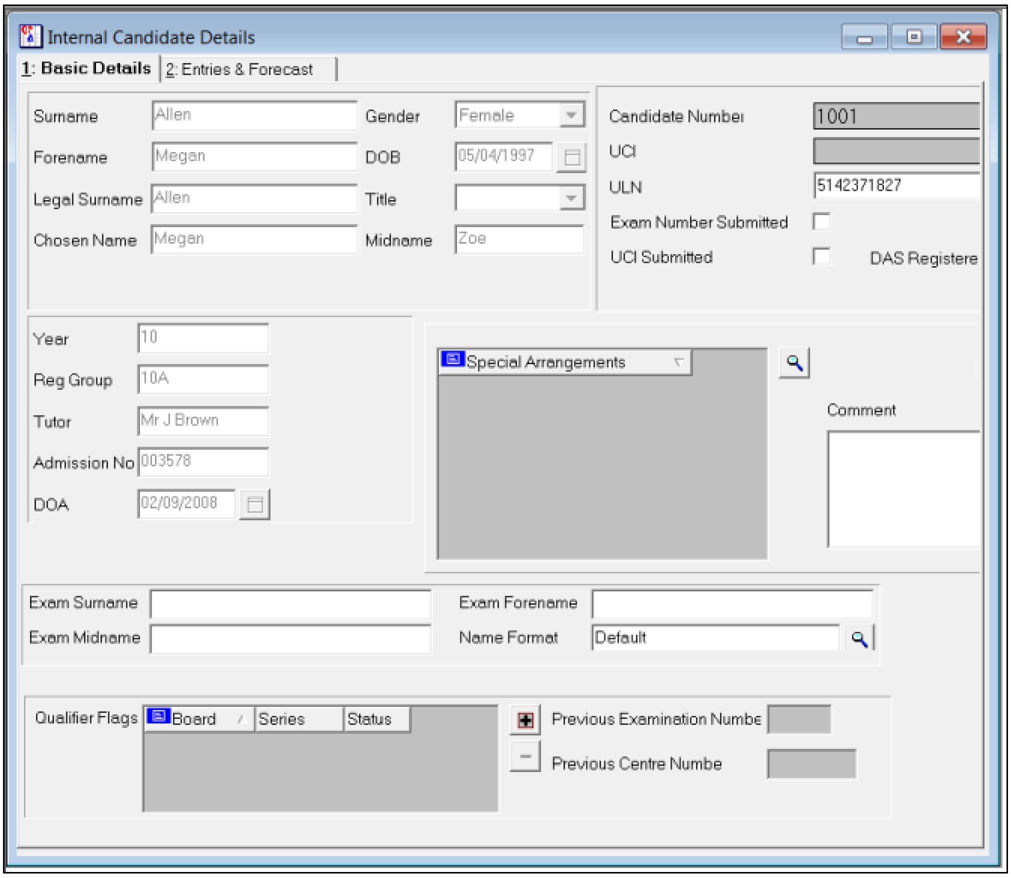
More Information:
Making Special Arrangements for Candidates on page *90*

Viewing/Editing Internal Candidate Details

All internal candidates and their details are made available to Examinations Organiser from students recorded on the **Student Details** page (via **Focus | Students | Student Details**).

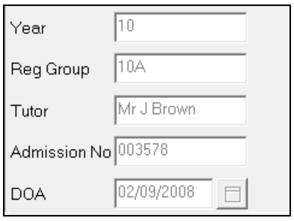
It is possible to edit only examination-related details in Examinations Organiser, such as the name format and previous Examination and Centre numbers. Changes to any personal details must be performed in SIMS. For more information, please refer to the *Managing Pupil/Students* handbook.

1. Select **Focus | Candidates | Internal** to display the **Internal Candidate** browser.
2. Highlight the candidate whose details you want to edit and click the **View/Edit** button to display the **Internal Candidate Details** form. The **Basic Details** page is selected automatically.



Viewing Personal, Year and Reg Group Details

The details displayed in this section are read-only and as such cannot be edited. Any changes to these details should be made in SIMS.

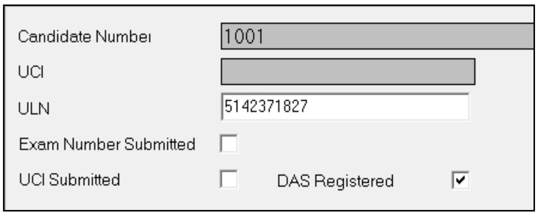


Additional Resources:

Important Information on the Usage of the Candidate Name Fields in the *Getting Started with Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook

Viewing Examination Details

The details displayed in this section relate to Examinations Organiser and are editable either on this page or elsewhere in the module.



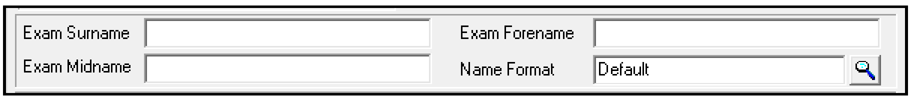
The **Candidate Number** and **UCI** fields are populated with any existing numbers that were assigned in **Tools | Allocate UCI & Exam Numbers**.

The **ULN** field displays the candidate's Unique Learner Number and can be edited, if required.

The **Exam Number Submitted** and **UCI Submitted** check boxes will automatically be selected if these numbers have been registered with the examination board (i.e. submissions have been made using these numbers).

Select the **DAS Registered** check box if the candidate has been registered with the Diploma Aggregation Service.

Editing a Candidate's Exam Name



Enter or edit the **Exam Surname**, **Exam Midname** and **Exam Forename**, if required.

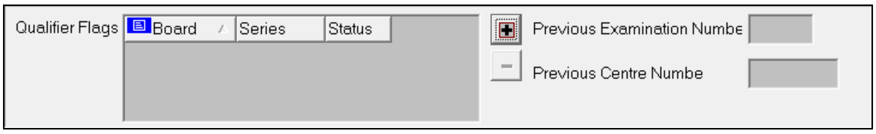
The **Name Format** field indicates the way in which this candidate's name is displayed. The default setting is **Default**, which sets the name format to that set in **Tools | School Setup | School Details**. Change this value by clicking the **Field Browser** button adjacent to the **Name Format** field and selecting a value from the **Format** drop-down list.

Additional Resources:

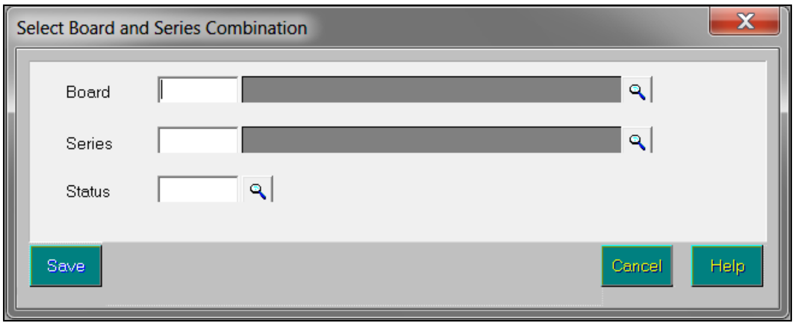
Important Information on the Usage of the Candidate Name Fields in the *Getting Started with Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook

Setting Qualifier Flags

Qualifier Flags should be used only if you want to notify the examination board that a candidate is a Guest, or if you want coursework previously submitted for a candidate to be taken into account for any series in the current season. Qualifier Flags are fully described in the booklet **Formats for the Exchange of Examination Related Data** published by the Joint Council for General Qualifications.



Click the **Add Item** button adjacent to the **Qualifier Flags** list box to display the **Select Board and Series Combination** dialog.



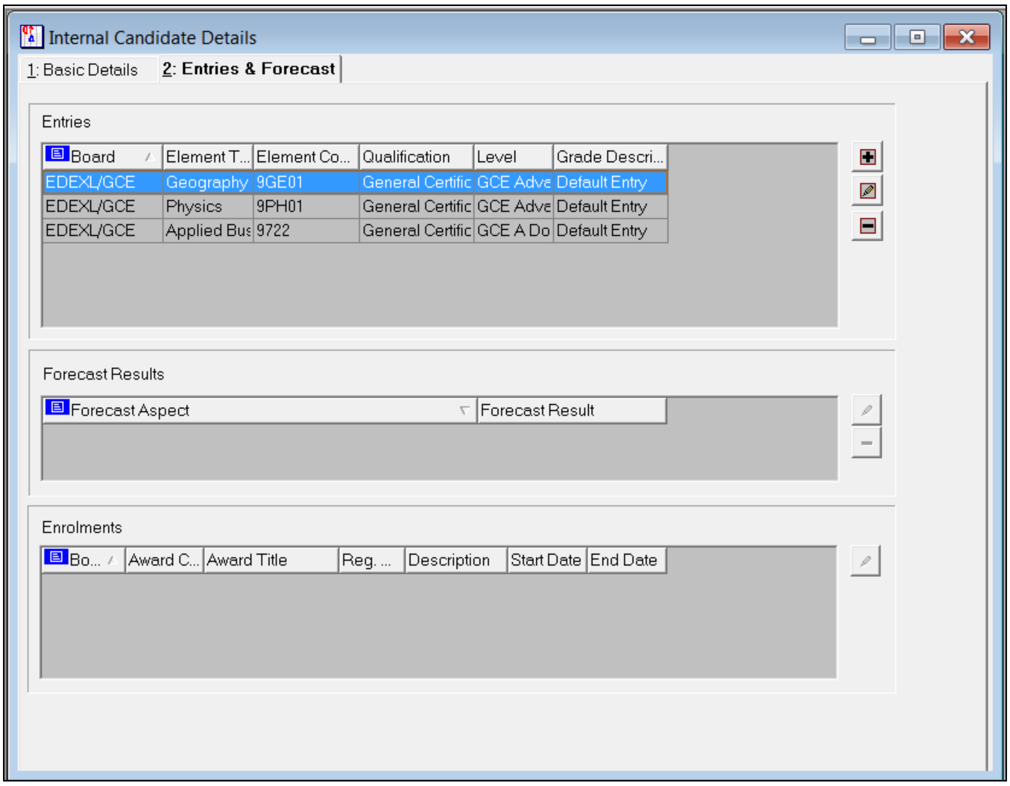
This enables you to choose the **Board**, **Series** and **Status** with which to associate a candidate. Select a **Status** of **Guest** if the candidate is not on-roll at your school or **Previous** if coursework has already been sent to, and accepted by the examination board in association with a previous entry, and you want the coursework to be carried forward for the current entry.

> *NOTE: Where a coursework mark from a previous season is to be carried forward, this flag must be set to **P** before a coursemark submission is generated. Such marks should be entered as **0**, with Status **F**. The Formats book specifies that the form of submission should be **F<space><space><space>**. The conversion from **0** to spaces is performed by the submission routine itself.*

Managing Examination Entries and Forecast Grades for Internal Candidates

There are two methods that can be used to make examination entries. You can enter candidates using a marksheet, which is useful for a large number of examination entries for a common component. Alternatively, you can enter individual candidates for an examination using the **Entries & Forecast** page of the **Internal Candidate Details** form.

1. Select **Focus | Candidates | Internal** to display the **Internal Candidate** browser.
2. Highlight the candidate for whom you want to add an examination entry and click the **View/Edit** button to display the **Internal Candidate Details** form. The **Basic Details** page is automatically selected.
3. Select the **Entries & Forecast** page.



The **Entries & Forecast** page enables you to enter individual candidates for examinations and, where necessary, assign forecast grades. This method of entering candidates for examinations is particularly useful when there is a small number of candidates to be entered for a particular examination.

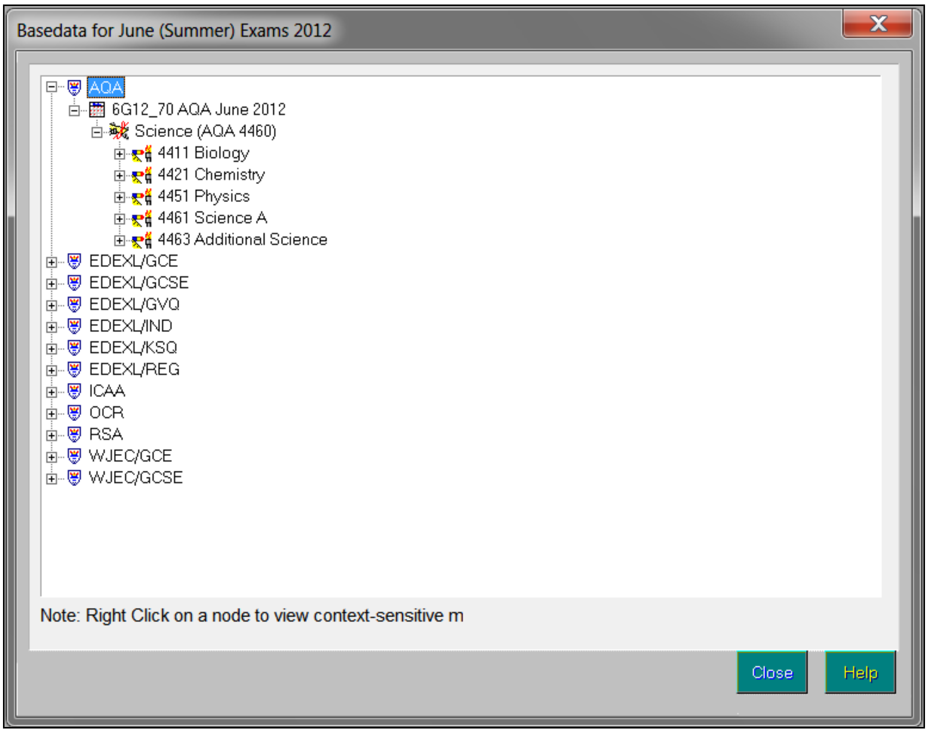
The **Entries** panel displays details of any examinations for which the selected candidate has been entered. The examination board, element, qualification and level, etc. are displayed for each examination entry.

The entries displayed include those made via a marksheet or by adding examination entries manually.

The **Enrolments** panel is currently unused.

4. Click the **Add Item** button to display the **Entry Details** dialog.

Alternatively, highlight an existing examination entry in the **Entries** panel and click the **Edit Item** button to edit an existing entry.



This dialog displays a navigation tree, comprising the examination boards (at the top level), the series (at the second level) and the elements (at the third level) for the selected season. This dialog enables the selection of multiple elements.

> *NOTE: Unlike the standard Basedata tree, the award and component nodes are not displayed.*

Any examination board and series for which the selected candidate has entries is identified by a grey tick in its check box. When expanded, the following conventions are used:

- Elements for which entries are already recorded are shaded in grey, with a black tick (e.g. **015001 English Foundation**).
- If there is a withdrawn entry on record (i.e. **Entry Mode = 'N'**), this element is shaded in pink, with its check box deselected (e.g. **014501 Drama Basic**).
- When a new element has been selected, its check box is selected, but the node is unshaded (e.g. **Science Single Higher**).

5. Select the element(s) to enter the selected candidate. Navigate through the tree structure, using the **+** and **–** buttons, from the top level (examination board) to the third level (element) and select the check box(es) for the element(s) you want to enter the selected candidate.

> *NOTE: Examination awards are not displayed in this tree structure.*

The **Number Selected** refers only to the items selected for addition in the current process.

6. Select an **Entry Mode** by clicking the **Field Browser** button at the top of the dialog. This mode is applied to all entries added on this visit.

   There are three modes of entry: Centre (**C**), Default (**Y**) and Private (**P**).

   Default indicates to the system that individual entries are to be marked according to the value set in the **School Details** dialog (in **Tools | School Setup | School Details**). The other two are taken literally, over-riding this default, if necessary.

   > *NOTE: When editing existing examination entries, you can withdraw a candidate from an examination by selecting **No Entry** from the **Grade** list. This option is only available from the list when editing an existing examination entry.*

7. When you are satisfied with the entries you have made, click the **Select** button to confirm your choice and return to the **Entries & Forecast** page of the **Internal Candidate Details** form.
8. Click the **Save Record Changes** button.

   This form can be used only to add entries, not to withdraw an entry or change the entry mode.
9. If you want to delete an entry from within the candidate focus, as opposed to changing the entry mode to 'N', click the **Delete Item** button.

   You are prompted to confirm the deletion, and informed that any forecast grade records are deleted at the same time. If seating arrangements exist relating to the element, you are informed but the seating arrangements are not removed.

   The seating arrangements remain because often, options have components in common, and where the deletion of the element entry is performed as part of a transfer from one option to another, deletion of seating arrangements is not necessarily appropriate.
10. To allocate a forecast grade for a candidate, highlight the associated entry in the **Entries** panel.

    The **Forecast Results** panel displays the forecast details for examinations for which the selected candidate has been entered.
11. Click the **Edit Item** button adjacent to the **Forecast Results** panel to display the **Forecast Entry Details** dialog.
12. Click the **Field Browser** button adjacent to the **Result** field and select the forecast **Grade** from the list of valid grades.
13. Click the **Update** button to confirm your choice and return to the **Entries & Forecast** page of the **Internal Candidate Details** form.

    The **Forecast Result** field is populated with the selected value.
14. Click the **Save Record Changes** button.

Transferring the Candidate Status from Internal to External

If a candidate was previously defined as an internal candidate for the season, and has since left your establishment but is still sitting examinations at the establishment, you can transfer their status from internal candidate to external candidate. Using this routine means that you would not have to create an external candidate manually, and would not therefore end up with duplicate people in your SIMS SQL database.

This process can also be used to transfer candidates from internal to external who were added as internal candidates in error.

NOTES: Transferring a candidate from internal to external does not affect any examination results previously recorded for that candidate. Any existing examination results are retained within the SIMS SQL database.

It is not necessary to reassign Exam Numbers or UCIs to candidates who have been transferred in this way.

1. Select **Focus | Candidates | Internal** to display the **Internal Candidate** browser.
2. Highlight the candidate you wish to transfer to an external candidate and click the **View/Edit** button to display the **Internal Candidate Details** form.
3. Select **Internal Candidate | Transfer as External Candidate** to transfer the selected candidate.

   The candidate's details are replaced with the next candidate in the browser. The transferred candidate will no longer be displayed in the **Internal Candidate** browser, but is displayed in the **External Candidate** browser (which can be opened by selecting **Focus | Candidates | External**).

Deleting Internal Candidates

It is only possible to delete a candidate who does not have any entries recorded.

1. Select **Focus | Candidates | Internal** to display the **Internal Candidate** browser.
2. Highlight the required candidate and click the **View/Edit** button to display the **Internal Candidate Details** form.
3. Click the **Delete Record** button.

03| Administering External Candidates

Selecting Potential Candidates for Examinations 21
Adding External Candidates 21
Viewing/Editing External Candidate Details 24
Managing Examination Entries and Forecast Grades for External Candidates 30
Transferring the Candidate Status from External to Internal 33
Deleting External Candidates 33

Selecting Potential Candidates for Examinations

External candidates are people who are not on-roll at your school and who may potentially be sitting examinations in a specific examination season. They are usually people for whom you have not been responsible as far as the supervision of their coursework is concerned.

They will ordinarily require adding to the SIMS system through Examinations Organiser, although it is essential that you check whether the person already exists (as a parent, member of staff, etc.) before adding them, to avoid duplication.

External candidates taking the examinations must be associated with each required season. For external candidates, you will need to identify the people that you expect to be potential candidates for examinations.

Once a person has been selected within the appropriate season, Exam and UCI numbers can be allocated and they can be entered for one or more examinations. Once the entries have been finalised, you can create a submission file and send it to the appropriate examination board.

At the time of making entries to the examination boards, the list of potential candidates is reviewed and each candidate entered for one or more examinations is included in the entry file.

More Information:
Generating Examination Numbers on page *4*
Generating the Unique Candidate Identifier on page *9*

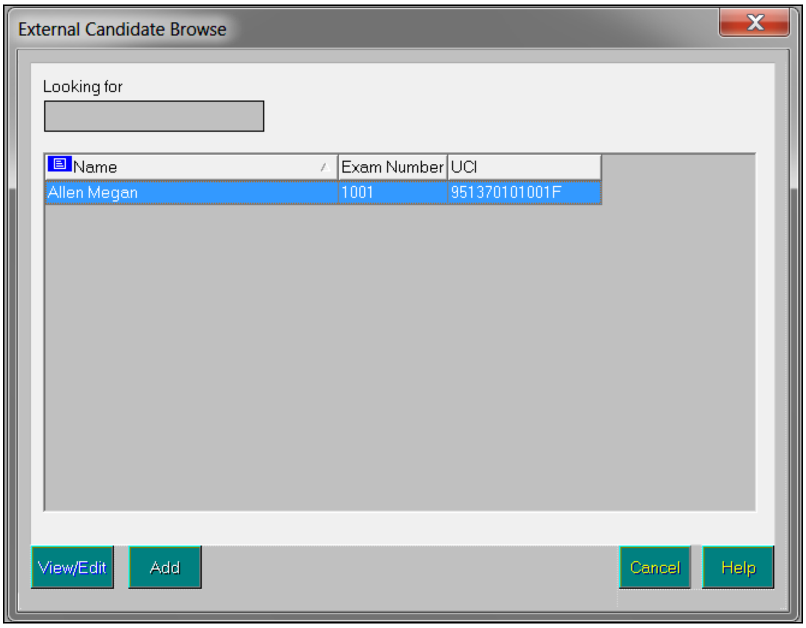
Adding External Candidates

For a person to be considered for taking an examination, they must first be recognised as a **Candidate** in Examinations Organiser.

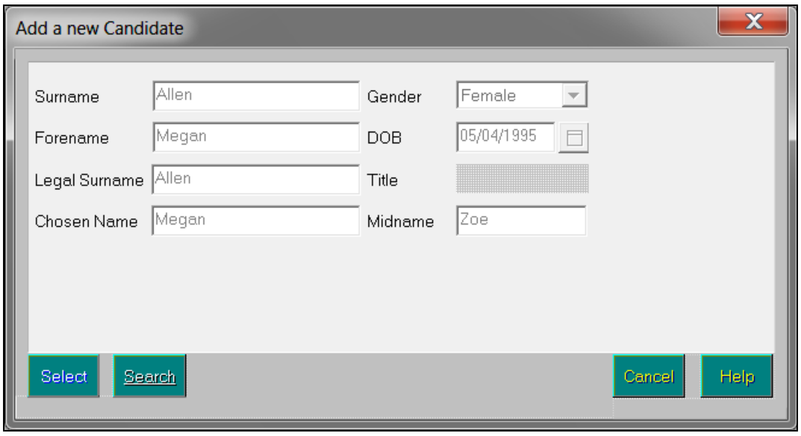
Registering a person as an external candidate consists of associating them with a season and allocating both an Exam Number and a UCI number.

NOTE: You cannot add external candidates if the season is locked or closed.

1. Select **Focus | Candidates | External** to display the **External Candidate Browse** dialog.



2. Click the **Add** button to display the **Add a new Candidate** dialog.



This dialog serves two purposes. Firstly, it acts as a search facility, so before you enter a candidate's details into the system, you can check to see whether their details already exist. Alternatively, if you are sure that they do not already exist, you can enter some basic details in the dialog and this forms the basis of the candidate's record.

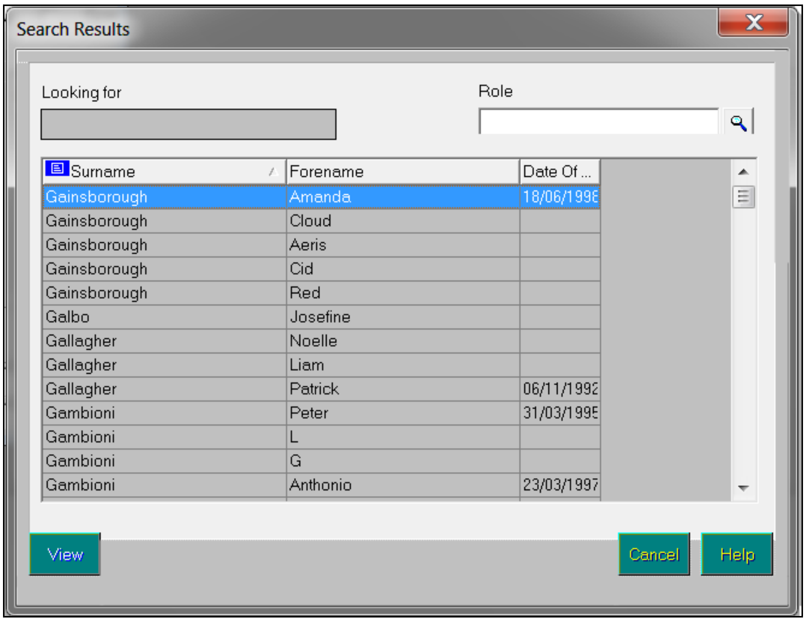
IMPORTANT NOTE: *If you intend to enter a former student for examinations as an external candidate, ensure that you find them as an existing person, rather than entering their details manually. If you enter their details manually, it will not be possible to enter their UCI number because the system will detect that it is a duplicate and therefore reject it.*

Searching for an Existing Person

If you want to check whether a person's details already exist on the system, enter some search parameters in the **Add a new Candidate** dialog. You can search on their name, gender and date of birth. Partial details can be entered as search parameters, so by entering 'Smi' in the **Surname** field, people whose surname is 'Smith', 'Smithers', etc. are located.

> *NOTE: These search fields are <u>not</u> case sensitive.*

When the search parameters have been entered, click the **Search** button to perform the search. Any matches to the criteria entered are displayed in the **Search Results** browser.



> *NOTE: If a large number of people matching the search criteria are displayed, filter the results by selecting a person role. This is achieved by clicking the **Field Browser** button adjacent to the **Role** field and selecting an appropriate value. Selecting a value in this way ensures that only a specific type of person is displayed in the **Search Results** browser. Available values include **Candidate**, **Employee**, **Student**, **Parent** and **Governor**.*

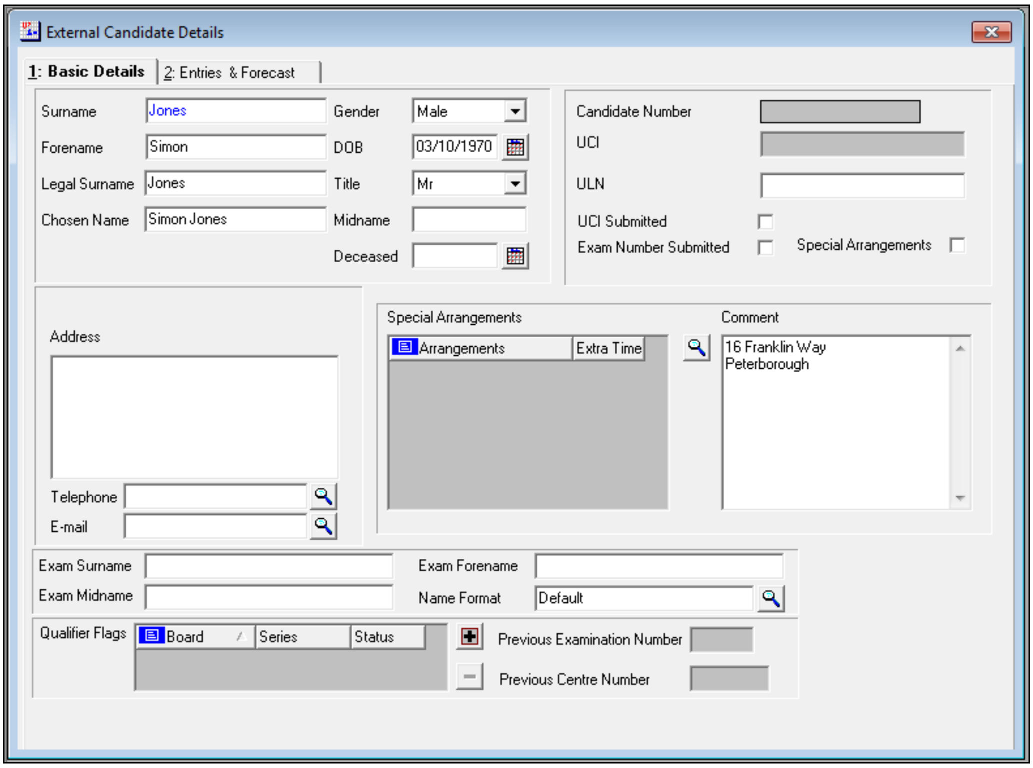
If the person for whom you are searching exists in this list, you do not need to enter their details. Click the **View** button to display the **Add a new Candidate** dialog to view their basic details and click the **Select** button to view or edit the rest of their details in the **External Candidate Details** form.

Adding a New Person

Instead of searching for an existing person on the system, you can add a person's details from the **Add a new Candidate** dialog. This is the preferred method if you are <u>certain</u> that the person does not already exist in SIMS.

> *NOTE: For cases where you are <u>not</u> certain whether their details already exist, you are encouraged to search for an existing person (please see* Searching for an Existing Person *on page* 23*).*

Enter the person's details in the **Add a new Candidate** dialog, such as their surname, forename, gender and date of birth and click the **Select** button to display the **External Candidate Details** form.

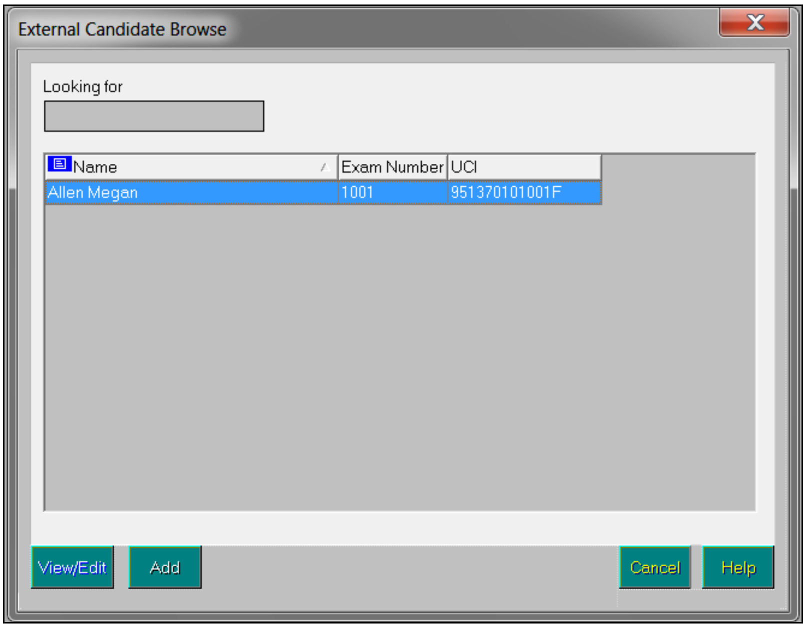


Viewing/Editing External Candidate Details

External candidate details can come from two sources. They may have been made available to Examinations Organiser from SIMS. Alternatively, their details may have been added to the system manually in Examinations Organiser (please see *Adding a New Person* on page *23*).

Changes to any personal details <u>must</u> be performed in Examinations Organiser because no record of their data is held in SIMS.

1. Select **Focus | Candidates | External** to display the **External Candidate Browse** dialog.

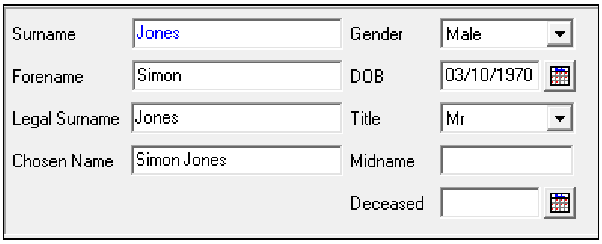


The names of those registered as external candidates are displayed, together with their **Exam Number** and their **UCI** number.

2. Highlight the candidate whose details you want to edit and click the **View/Edit** button to display the **External Candidate Details** form. The **Basic Details** page is automatically selected.

Viewing/Editing Personal Details

The following personal details can be edited as required.



Additional Resources:

Important Information on the Usage of the Candidate Name Fields in the *Getting Started with Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook

Viewing/Editing Address and Contact Details

The **Telephone** and **Email** details can be edited as required. The **Address** details are read-only and as such cannot be edited.

*TIP: If you want to record an address for an external candidate, add their address into the **Comment** section of the **External Candidate Details** dialog. This ensures that their address is associated with their record and is readily available when viewing their details.*

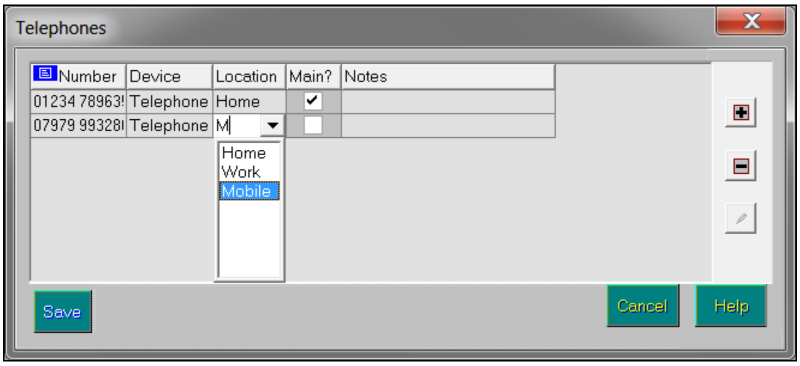
Adding/Editing Telephone Number Details

It is possible to compile a list of telephone numbers relating to the selected person. One number can be assigned a status of **Main** for each type (e.g. land line, fax, pager) or location (e.g. home, work, mobile) of telephone. This indicates the number that is most likely to be used as a contact for each of these types or locations.

Any number of telephone numbers may be associated with a particular person, but only one status of **Main** can be assigned to each identical combination of type or location. For example, if two home land line numbers have been associated with a person, only one can be assigned as **Main** because both the type (land line) and location (home) are identical. The telephone number assigned as **Main** is displayed in the **Telephone** field of the **Contact Details** panel.

If one home land line number and one work land line number have been associated with a person, each can be assigned as a **Main** number because the type of number is the same (land line) but the location is different (one for home, one for work).

1. Click the **Field Browser** button adjacent to the **Telephone** field to display the **Telephones** dialog.



2. Click the **Add Item** button to add a telephone number for the selected person. Alternatively, highlight an unwanted telephone number and click the **Delete Item** button. To edit a telephone number, highlight the appropriate record and edit the details accordingly.
3. Enter the **Number** of the communication device up to a maximum of 20 alpha-numeric characters.
4. Select the **Device** using the drop-down list. Available devices are **Telephone**, **Fax** and **Pager**.
5. Select the **Location** using the drop-down list. Available locations are **Home**, **Work** and **Mobile**.
6. Select the number(s) to assign as main numbers by highlighting the appropriate **Main?** check box and clicking the **Edit Item** button.
7. Click the **Save** button or click the **Cancel** button to cancel the changes made, as appropriate.

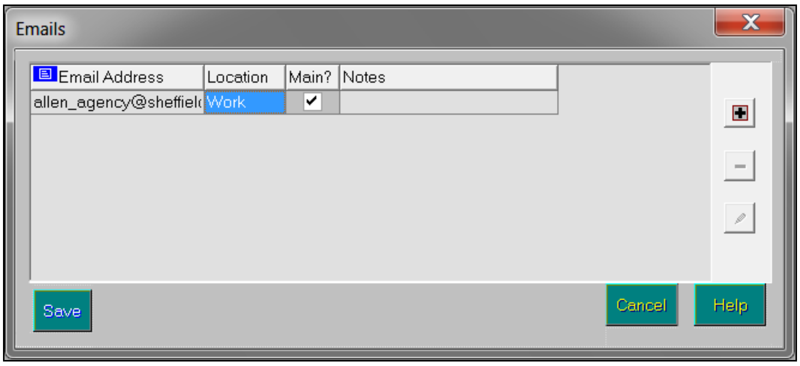
Adding/Editing Email Address Details

It is possible to compile a list of email addresses relating to the selected person. One address can be assigned a status of **Main** for each location (e.g. home, work, mobile). This indicates the email address that is most likely to be used as a contact for each of these locations.

Any number of email addresses may be associated with a particular person, but only one status of **Main** may be assigned to each location. For example, if two home email addresses have been associated with a person, only one can be assigned as **Main** as the locations are identical. The email address assigned as **Main** is displayed in the **Email** field of the **Contact Details** panel.

If one home email address and one work email address have been associated with a person, each can be assigned as a **Main** address as, although there are two email addresses, the location is different.

1. Click the **Field Browser** button adjacent to the **Email** field to display the **Emails** dialog.



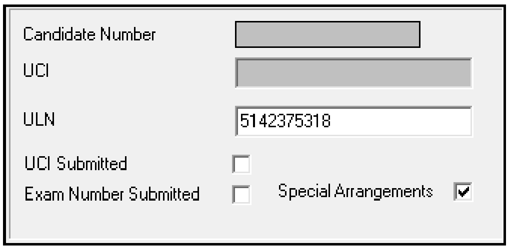
2. Click the **Add Item** button to add an email address for the selected person. Alternatively, to delete an unwanted email address, highlight a redundant or incorrect address and click the **Delete Item** button.
3. Enter the **Email Address** up to a maximum of 60 alpha-numeric characters.

> *NOTE: The **Email Address** <u>must</u> contain '**@**' <u>before</u> the last character for it to be accepted as a valid email address.*

4. Select the **Location** using the drop-down list. Available locations are **Home**, **Work** and **Mobile**.
5. Select the address(es) to assign as main addresses by highlighting the appropriate **Main?** check box and clicking the **Edit Item** button.
6. Click the **Save** button or click the **Cancel** button to cancel the changes made, as appropriate.

Viewing Examination Details

The details displayed in this section relate to Examinations Organiser and are editable either on this page or elsewhere in the module.



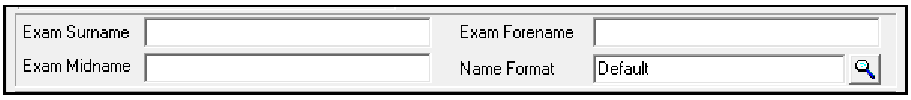
The **Candidate Number** and **UCI** fields are populated with any existing numbers that were assigned in **Tools | Allocate UCI & Exam Numbers**.

The **ULN** field displays the candidate's Unique Learner Number and can be edited, if required.

The **Exam Number Submitted** and **UCI Submitted** check boxes are automatically selected if these numbers have been registered with the examination board (e.g. submissions have been made using these numbers).

Select the **Special Arrangements** check box if the candidate is eligible for additional time for an examination. Special examination arrangements may be approved for candidates who are unable to sit examinations under normal examination conditions, as a result of a disability or other medical condition. Special arrangements are designed to ensure that fair and just examination conditions are provided to enable candidates to demonstrate their knowledge and competence notwithstanding their disability (please see *Making a Candidate Eligible for Special Arrangements* on page *92*).

Editing a Candidate's Exam Name



Enter or edit the **Exam Surname**, **Exam Midname** and **Exam Forename**, if required.

The **Name Format** field indicates the way in which this candidate's name is displayed. The default setting is **Default**, which sets the name format to that set in **Tools | School Setup | School Details**. Change this value by clicking the **Field Browser** button adjacent to the **Name Format** field and selecting a value from the **Format** drop-down list.

 *Field Browser button*

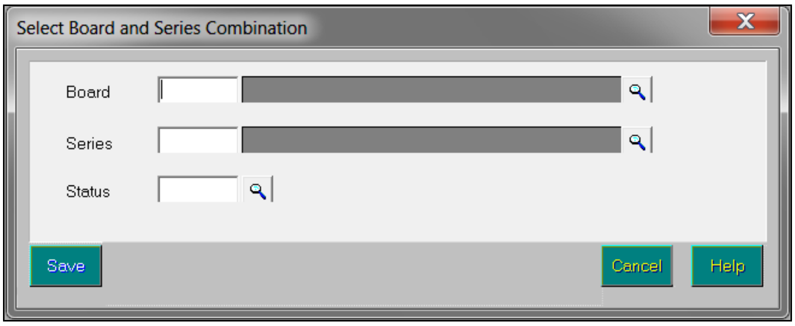
Additional Resources:

Important Information on the Usage of the Candidate Name Fields in the *Getting Started with Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook

Setting Qualifier Flags

Qualifier Flags should be used only if you wish to notify the examination board that a candidate is a Guest, or if you wish coursework previously submitted for a candidate to be taken into account for any series in the current season. Qualifier Flags are fully described in the booklet **Formats for the Exchange of Examination Related Data** published by the Joint Council for General Qualifications.

Click the **Add Item** button adjacent to the **Qualifier Flags** list box to display the **Select Board and Series Combination** dialog.



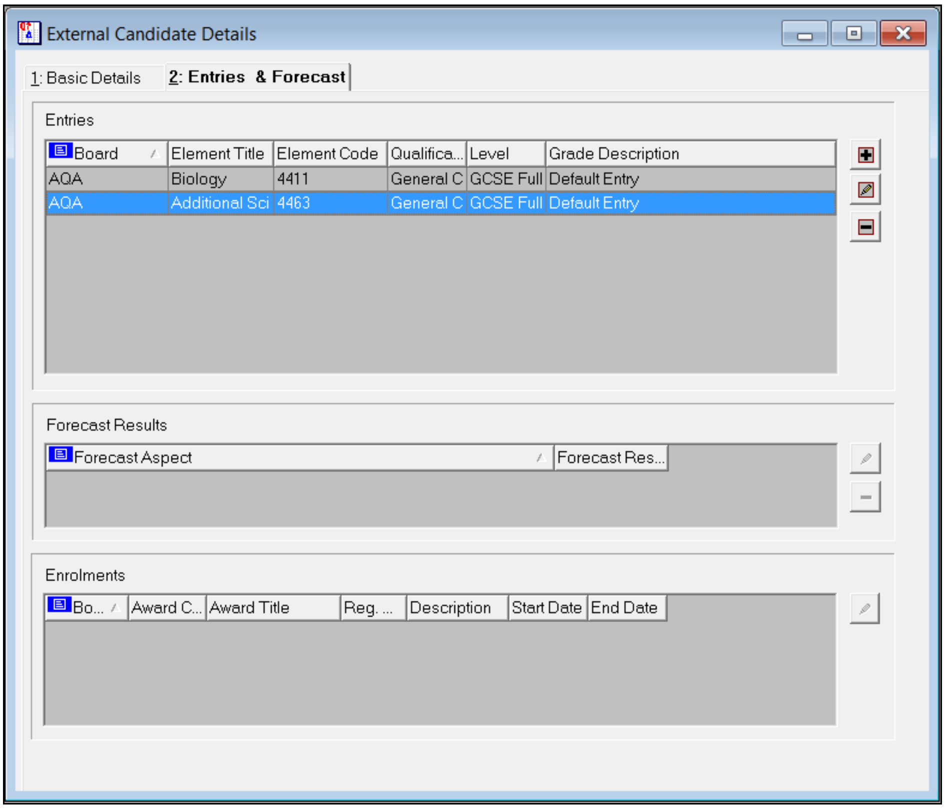
This enables you to choose the **Board**, **Series** and **Status** with which to associate a candidate. Select a **Status** of **Guest** if the candidate is not on-roll at your school or **Previous** if coursework has already been sent to, and accepted by the examination board in association with a previous entry, and you want the coursework to be carried forward for the current entry.

*NOTE: Where a coursework mark from a previous season is to be carried forward, this flag must be set to **P** before a coursemark submission is generated. Such marks should be entered as **0**, with Status **F**. The Formats book specifies that the form of submission should be **F<space><space><space>**. The conversion from **0** to spaces is performed by the submission routine itself.*

Managing Examination Entries and Forecast Grades for External Candidates

There are two methods that can be used to make examination entries. You can enter candidates using a marksheet, which is useful for a large number of examination entries for a common component. Alternatively, you can enter individual candidates for an examination using the **Entries & Forecast** page of the **External Candidate Details** form.

1. Select **Focus | Candidates | External** to display the **External Candidate** browser.
2. Highlight the candidate for whom to add an examination entry and click the **View/Edit** button to display the **External Candidate Details** form. The **Basic Details** page is automatically selected.
3. Select the **Entries & Forecast** tab.

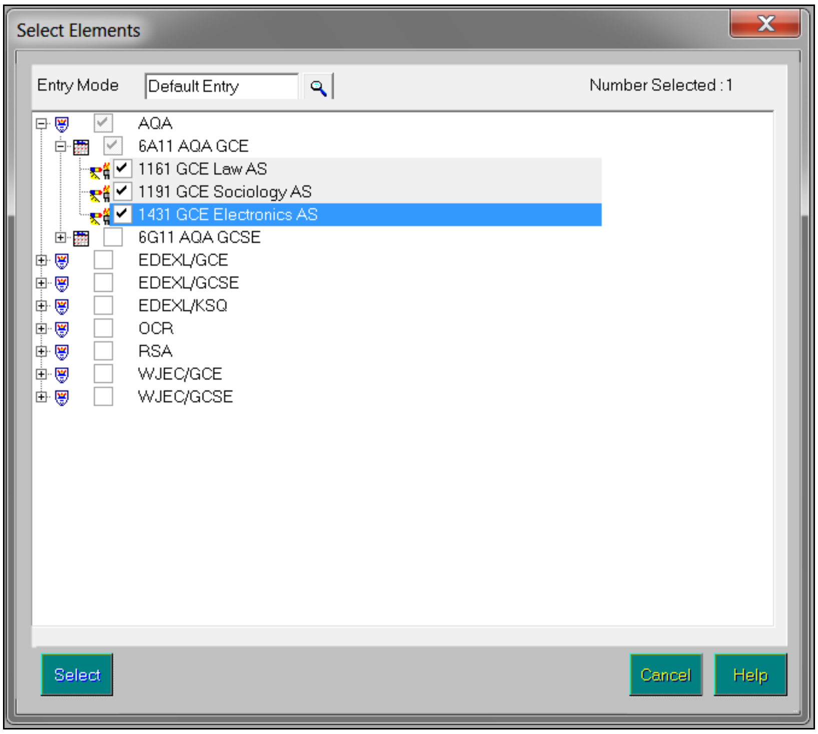


The **Entries & Forecast** page enables you to enter individual candidates for examinations and, where necessary, assign forecast grades. This method of entering candidates for examinations is particularly useful when there is a small number of candidates to be entered for a particular examination.

The **Entries** panel displays details of any examinations for which the selected candidate has been entered. The examination board, element, qualification and level, etc. are displayed for each Examination Entry.

The entries displayed include those made via a marksheet or by adding examination entries manually.

4. Click the **Add Item** button to display the **Select Elements** dialog.



This dialog displays a navigation tree, comprising the examination boards (at the top level), the series (at the second level) and the elements (at the third level) for the selected season. This dialog allows for the selection of multiple elements.

> *NOTE: Unlike the standard Basedata tree, the award and component nodes are not displayed.*

Any examination board and series for which the selected candidate has entries is identified by a grey tick in its check box. When expanded, the following conventions are used:

- Elements for which entries are already recorded are shaded in grey, with a black tick (e.g. **015001 English Foundation**).
- If there is a withdrawn entry on record (i.e. **Entry Mode = 'N'**), this element is shaded in pink, with its check box deselected (e.g. **014501 Drama Basic**).
- When a new element has been selected, its check box is selected, but the node is unshaded (e.g. **Science Single Higher**).

5. Select the element(s) for which to enter the selected candidate. Navigate through the tree structure, using the **+** and **–** buttons, from the top level (examination board) to the third level (element) and select the check box(es) for the element(s) to enter the selected candidate.

> *NOTE: Examination awards are not displayed in this tree structure.*

The **Number Selected** refers only to the items selected for addition in the current process.

6. Select an **Entry Mode** by clicking the **Field Browser** button at the top of the dialog. This mode is applied to all entries added on this visit.

   There are three modes of entry: Centre (**C**), Default (**Y**) and Private (**P**).

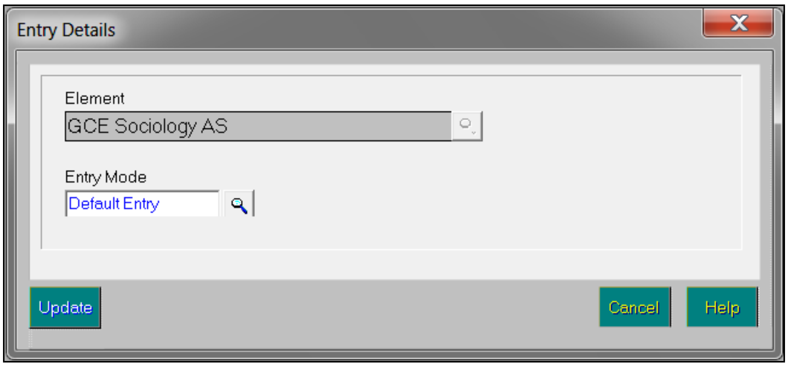
   Default indicates to SIMS that individual entries are to be marked according to the value set in the **School Details** dialog (in **Tools | School Setup | School Details**). The other two are taken literally, over-riding this default if necessary.

   > *NOTE: When editing existing examination entries, you can withdraw a candidate from an examination by selecting **No Entry** from the **Grade** list. This option is only available from the list when editing an existing examination entry.*

7. When you are satisfied with the entries you have made, click the **Select** button to confirm your choice and return to the **Entries & Forecast** page of the **External Candidate Details** form.
8. Click the **Save Record Changes** button.

   This form can be used only to add entries, not to withdraw an entry or change the entry mode.

   Alternatively, highlight an existing examination entry in the **Entries** panel and click the **Edit Item** button to display the **Entry Details** dialog.



9. If you want to delete an entry from within the candidate focus, as opposed to changing the entry mode to 'N', click the **Delete Item** button.

   You are prompted to confirm the deletion, and informed that any forecast grade record will be deleted at the same time. If seating arrangements exist relating to the element, you are informed, but the seating arrangements are not removed.

   The seating arrangements remain because often, options have components in common, and where the deletion of the element entry is performed as part of a transfer from one option to another, deletion of seating arrangements is not necessarily appropriate.

10. To allocate a forecast grade for a candidate, highlight the associated entry in the **Entries** panel.

    The **Forecast Results** panel displays the forecast details for those examinations for which the selected candidate has been entered.

11. Click the **Edit Item** button adjacent to the **Forecast Results** panel to display the **Forecast Entry Details** dialog.

12. Click the **Field Browser** button adjacent to the **Result** field and select the forecast **Grade** from the list of valid grades.
13. Click the **Update** button to confirm your choice and return to the **Entries & Forecast** page of the **External Candidate Details** form.

    The **Forecast Result** field is populated with the selected value.
14. Click the **Save Record Changes** button.

Transferring the Candidate Status from External to Internal

If a candidate was previously defined as an external candidate, but has since joined your establishment, you can transfer their status from external candidate to internal candidate. Using this routine means that you do not have to delete their entries, delete them as an external candidate, re-assign them as an internal candidate and recreate their entries.

This process can also be used to transfer candidates from external to internal who were added as external candidates in error.

> *NOTES: Transferring a candidate from internal to external does not affect any examination results previously recorded for that candidate. Any existing examination results are retained within SIMS.*
>
> *It is not necessary to reassign Exam Numbers or UCIs to candidates who have been transferred in this way.*

1. Select **Focus | Candidates | External** to display the **External Candidate Browse** dialog.
2. Highlight the candidate to be transferred to an internal candidate and click the **View/Edit** button to display the **External Candidate Details** form.
3. Select **External Candidate | Transfer as Internal Candidate** to transfer the selected candidate.

   The candidate's details are replaced with the next candidate in the browser. The transferred candidate is no longer displayed in the **External Candidate Browse** dialog, but are displayed in the **Internal Candidate Browse** dialog (accessed via **Focus | Candidates | Internal**).

Deleting External Candidates

It is only possible to delete a candidate who does not have any entries recorded.

1. Select **Focus | Candidates | External** to display the **External Candidate Browse** dialog.
2. Highlight the required candidate name and click the **View/Edit** button to display the **External Candidate Details** form.
3. Click the **Delete Record** button.

04| Entering Data Using an OMR

Quick Start 35
Introduction 35
Creating OMR Sheets at the Same Time as a Template 38
Creating OMR Sheets Using Existing Templates 43
Printing and Deleting OMR Sheets 47
Reading OMR Sheets 49
Editing Results Entered via the OMR 50

Quick Start

If you are responsible only for entering the marks on to OMR sheets, please see *OMR Sheets* later in this chapter.

Introduction

An Optical Mark Reader (OMR) can be used in Examinations Organiser to:

- enter candidates for examinations
- enter forecast grades for candidates
- enter coursework marks for candidates
- enter examination results for candidates

For these purposes, an OMR can be used in conjunction with keyboard entry, if required. For example, you might use OMRs for entering candidates for examinations, whilst individual departments may prefer to enter Forecast Grades using the keyboard.

Where only one person is responsible for entering candidates for examinations, using an OMR is a quicker and more accurate method of entering information onto your system.

> ***IMPORTANT NOTE:*** *The design of OMR sheets has been altered for Examinations Organiser 6 and therefore the OMR stationery for Examinations for DOS should not be used.*

The process for registering candidates for examinations via OMR entry often involves entering forecast grades for each potential candidate (both internal and external). This is achieved by providing teachers with a list of candidates (in rows), together with the potential examinations that they can sit. This list is known as an OMR sheet. Each teacher will then enter a character to indicate that the candidate should be entered for that examination, to indicate their forecast grade or coursework mark or to indicate their examination result.

> *NOTES: Coursework component OMRs – it is not possible to create an OMR form for a coursework component when the component assessment takes the form of a grade. This is not generally an issue for public examinations because there are very few instances where a board specifies this. However, if you are using Examinations Organiser to manage the process of domestic examinations, you should be aware of this limitation.*
>
> *When printing OMR sheets for coursework marks, only candidates who have an element entry that is linked to the selected component are displayed.*

The process of entering information via OMR also uses functionality from SIMS Assessment, including the selection of aspects and the creation of marksheets.

OMR Templates

Before OMR sheets can be printed and distributed for marking, you must first create one or more OMR templates. The OMR template defines the content of the associated OMR sheets, including the aspect, process type, elements, columns and group(s) to be included on the OMR sheets.

Due to the number of columns available in an OMR sheet, each OMR template can only consist of one aspect, which in turn might be associated with one or more elements.

OMR Sheets

OMR Sheets can be created using one of the following methods:

- making selections from each page of the **OMR Sheet** wizard, which automatically creates and saves a template that can subsequently be used to recreate the OMR sheets at a later date.
- selecting an existing template and making ad hoc changes, if required, to the content of the template.

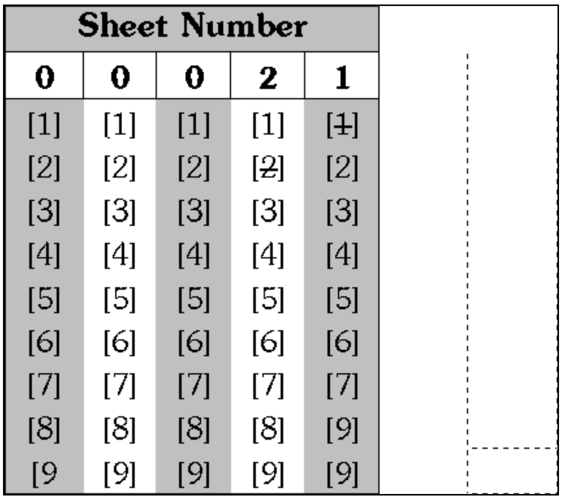
Both methods provide you with the opportunity to print the resulting OMR sheets at the end of the OMR sheet creation process, although you may wish to print them at a later date instead.

Once printed, the OMR Sheets can be passed to teachers for marking as entries, forecast grades, coursework marks or results and then fed into the system through the OMR. The same type of OMR sheet is used to collect each of the four process types, with just the range of grades, marks or entry types being different. The pupil/students in the selected group(s) are listed in rows, whilst the appropriate grade, mark or entry type available for selection are displayed across 26 of the 27 columns.

> *NOTE: The 27th column (annotated with an "X") should only be marked when you do **not** want a result read in for a pupil/student and will indicate a valid omission (e.g. when a pupil/student has been absent due to illness).*

Sheet Numbers

Each OMR sheet is given a unique Sheet Number (sheet id). This is displayed in the top left-hand corner of the printed OMR sheet.



Sheet Number				
0	0	0	2	1
[1]	[1]	[1]	[1]	[~~1~~]
[2]	[2]	[2]	[~~2~~]	[2]
[3]	[3]	[3]	[3]	[3]
[4]	[4]	[4]	[4]	[4]
[5]	[5]	[5]	[5]	[5]
[6]	[6]	[6]	[6]	[6]
[7]	[7]	[7]	[7]	[7]
[8]	[8]	[8]	[8]	[9]
[9	[9]	[9]	[9]	[9]

In addition to the display of the sheet number in the second row (00021 in this example), the sheet must also be marked, either with the sheet number as dashes in the lozenges or with a barcode. This choice is made in the **OMR Setup** dialog.

In this example, the option to mark the sheet number as dashes has been selected. If the barcode option is selected then it would be printed within the dotted lines to the right of the lozenges. If neither option is chosen then the OMR Sheet Number will need to be marked manually or the sheet will be rejected by the OMR.

The information on the header of the printed sheet will also detail the template Name, the pupil/student group name, the group Supervisor's name (if known), the result set (if selected) and the date of printing.

Duplicate OMR Sheets

You may need to reprint an OMR sheet, if perhaps the original becomes damaged or lost. The reprinted sheet has a unique **Sheet Number** and contain the same pupil/students in the same rows. When reading in a duplicate sheet, (or indeed an original sheet with changed results), then any existing results with the same **Result Date**, are overwritten.

> *NOTE: If you choose to re-read an OMR sheet, any previously selected results (entered either through the OMR sheet or by the keyboard, with the same result date) that are no longer marked on the sheet, will not be deleted.*

Marking OMR Sheets

To mark the sheet, a HB graphite pencil, which may be erased in case of an error, should be used. Avoid the use of a harder pencil, such as 2H as the mark may be too indistinct to be read reliably.

Result Date, Result History and Result Sets

Before reading OMR sheets through the OMR you are given the opportunity to select the **Result Date**. This is usually the date the results are attained and is the result date with which the results that are read in are associated. Unless you change it, the default result date (i.e. today's date) is applied. By reading in results for a pupil/student and applying different result dates you can build up a **Result History** for that pupil/student. If you choose to do this you may wish to group OMR sheets according to their result date to simplify the reading in process.

Care must be taken not to inadvertently build up a result history. For example, if you re-read the same sheet on two different days (perhaps because a mark was unclear or missing), without applying the same result date, the two default result dates (i.e. the current date) would be used and a result history would be created.

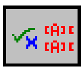
If you have associated the OMR template with a result set then only a single result can be stored for a pupil/student and an aspect, at any one time. If another result is read in then it will overwrite any existing result. Consequently, a result history cannot be created. Results sets can be locked, at any stage, to prevent further entry of results.

More Information:
How an Optical Mark Reader Works on page *147*
Setting Up an Optical Mark Reader on page *148*

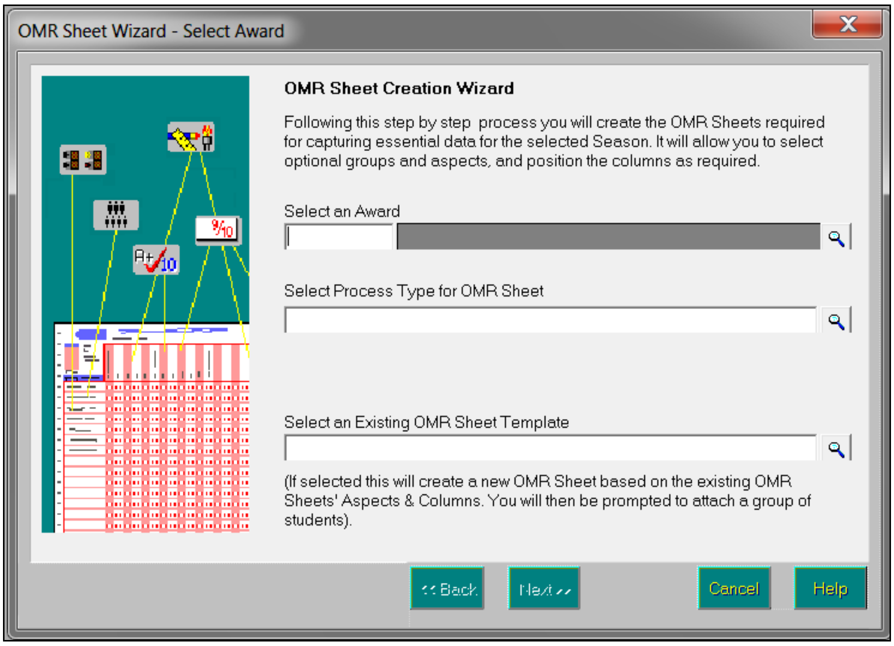
Creating OMR Sheets at the Same Time as a Template

This method creates an OMR Sheet based on the selections made in the **OMR Sheet** wizard and in doing so, creates a template that can subsequently be used to recreate the OMR Sheet at a later date. This would be particularly useful if you wish to use the same OMR Sheets year after year using a different group of candidates, for example. The data within an OMR Sheet is saved separately and therefore when an OMR Sheet is deleted, the data is retained.

1. Click the **OMR Sheet Setup** button on the Application Bar or select **Focus | OMR Sheet Setup** to display the **OMR Sheet** wizard. The **Select Award** page is automatically selected.



OMR Sheet Setup button



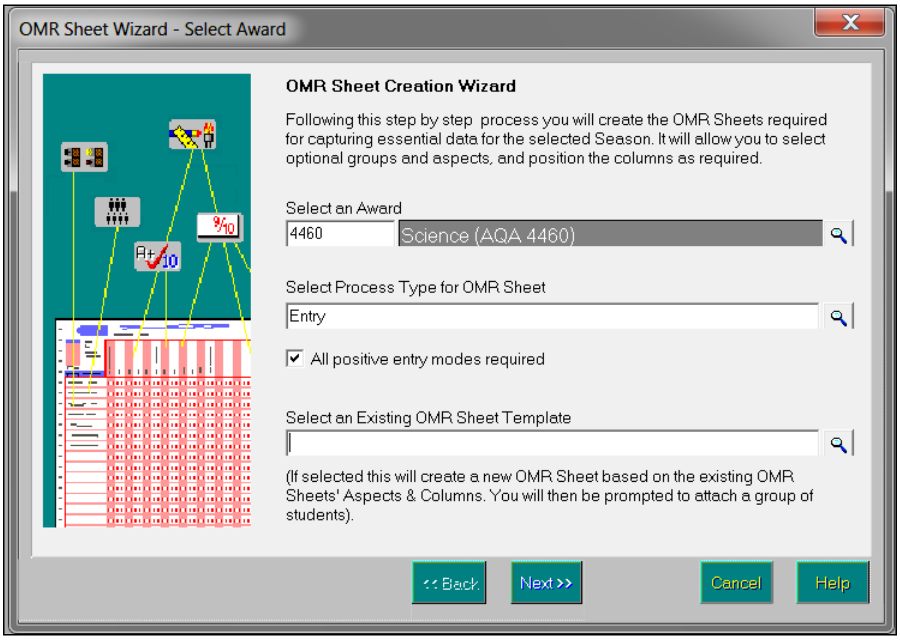
2. **Select an Award** on which you wish to base the OMR sheet by clicking the **Field Browser** button and selecting the appropriate award from the drop-down list.

    *Field Browser button*

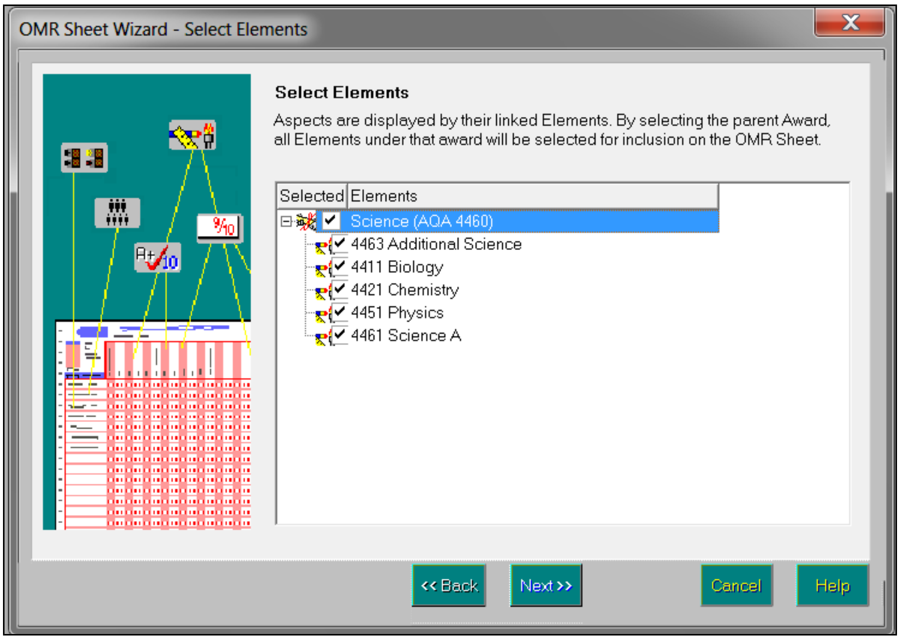
   The awards displayed are those imported as part of the basedata for the current season and those that have been created manually.

3. Select the process to be associated with the resulting OMR sheet by clicking the **Field Browser** button adjacent to the **Select Process Type for OMR Sheet** and selecting the appropriate process from the drop-down list. The options include **Coursework**, **Entry**, **Forecast** and **Result**.

4. To display all of the entry types for each element on the marksheet for an Entry OMR sheet, (e.g. C for Centre entry, P for Private entry, and Y for Default entry) select the **All positive entry modes required** check box.

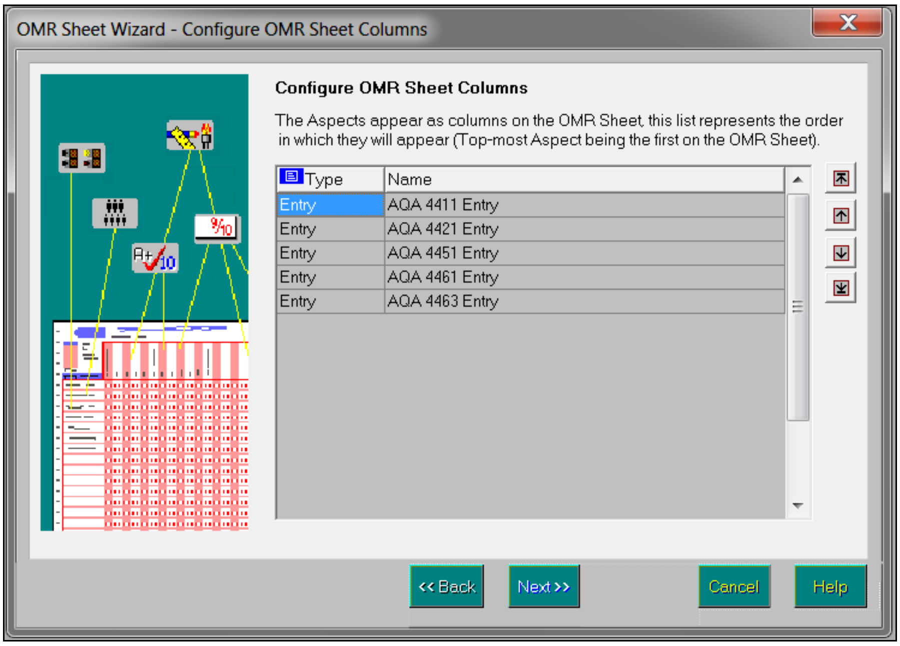


5. Click the **Next** button to display the **Select Elements** page.



6. Select the **Award** check box (top level) to select the award and all of its associated elements to include on the marksheet. Alternatively, you can select any combination of elements (second level) you wish to include in the marksheet by selecting the appropriate **Element** check box(es).

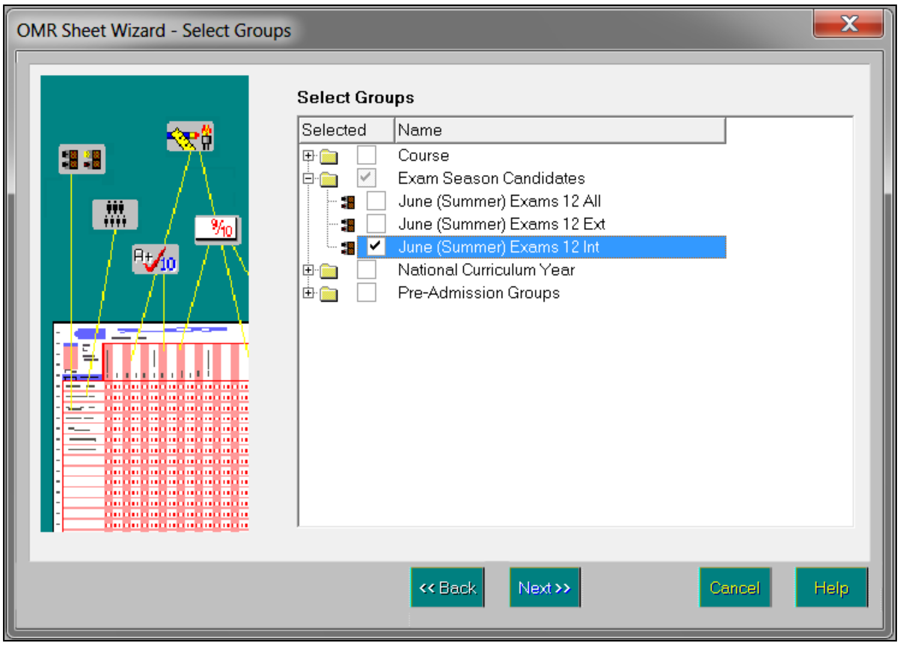
7. Click the **Next** button once the required elements have been selected for inclusion to display the **Configure OMR Sheet Columns** page (only if an **Entry** process type was selected). For all other process types selected, please continue from Step 10.



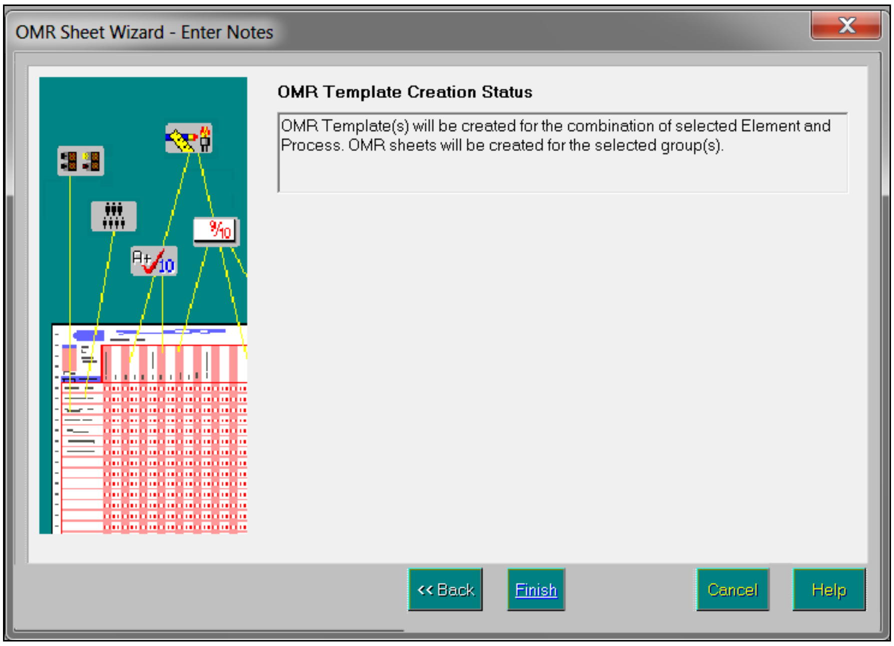
The OMR sheet **Type** selected on the first page of the wizard is displayed along with the **Name** of the aspect.

8. Use the buttons on the right-hand side of the page to manoeuvre the columns to the correct order. The aspect at the top of the list is displayed on the left-hand side of the resulting marksheet.
9. Click the **Next** button to display the **Select Groups** page.

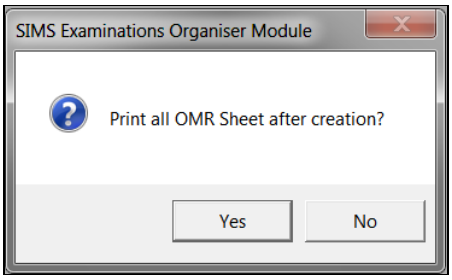
10. Using the navigation tree, select the group of examination candidates from which you wish to populate the marksheet. Select **Course**, **Exam Season Candidates** or **National Curriculum Year**.



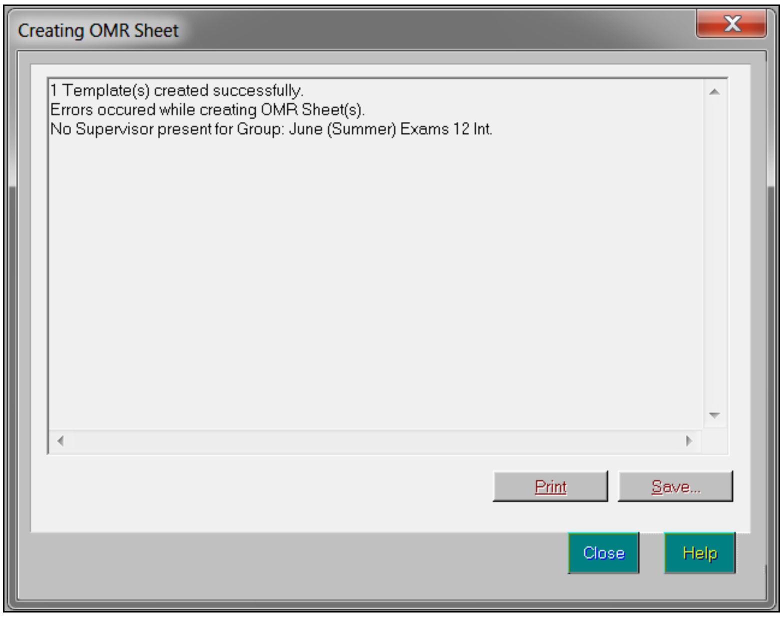
11. Click the **Next** button to display the **Enter Notes** page.



12. Click the **Finish** button and confirm whether you wish to automatically print all OMR sheets after creation.



As the OMR sheets are being created, the **Creating OMR Sheet** dialog is displayed.



13. Any errors encountered during the creation of the OMR sheets are displayed. These errors can be printed or saved by clicking the appropriate buttons.
14. Click the **Close** button to complete the process. These OMR sheets can then be accessed selecting **Tools | Manage OMR Sheets**.

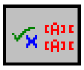
More Information:
Creating OMR Sheets Using Existing Templates on page *43*

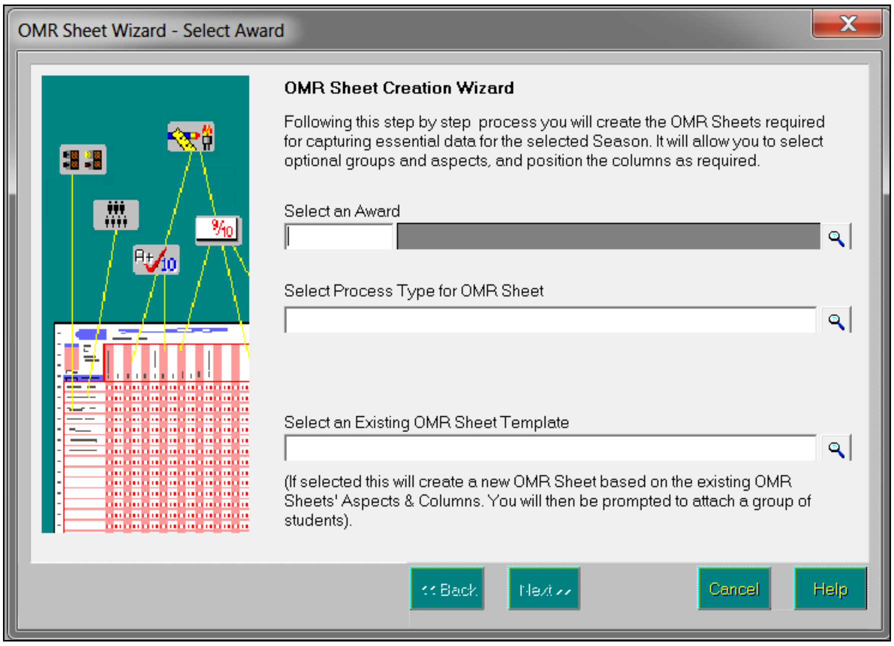
Creating OMR Sheets Using Existing Templates

This method creates a marksheet based on a previously created template and removes the need to continuously recreate identical marksheets. This would be particularly useful if you wish to use the same marksheets year after year but wish to select a different cohort of candidates, for example. The data within a marksheet is saved separately and therefore when a marksheet is deleted, the data is retained.

When creating marksheets using existing templates, the **Marksheet** wizard enables you to select the groups on which you want to base the marksheet. It will not allow you to select the required aspects or to position the columns, as this would have been defined when the template was created. The existing template notes can be edited as required.

1. Click the **OMR Sheet Setup** button on the Application Bar or select **Focus | OMR Sheet Setup** to display the **OMR Sheet** wizard. The **Select Award** page is automatically selected.

    *OMR Sheet Setup button*

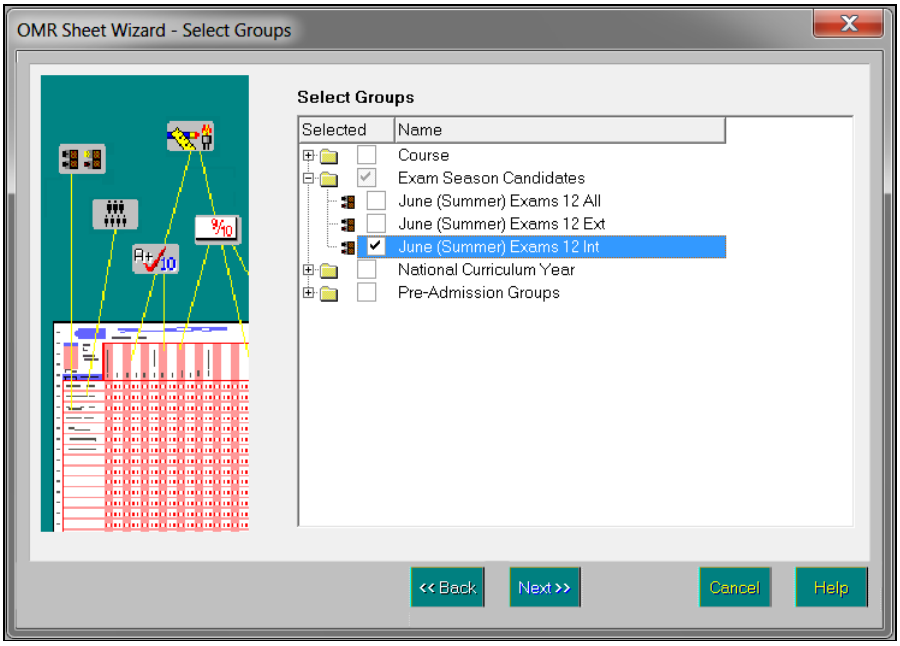
   

2. **Select an Existing OMR Sheet Template** on which you want to base the OMR sheet by clicking the **Field Browser** button and selecting the existing template from the drop-down list. Selecting a template bases the new OMR sheets on the aspects and columns in an existing template.

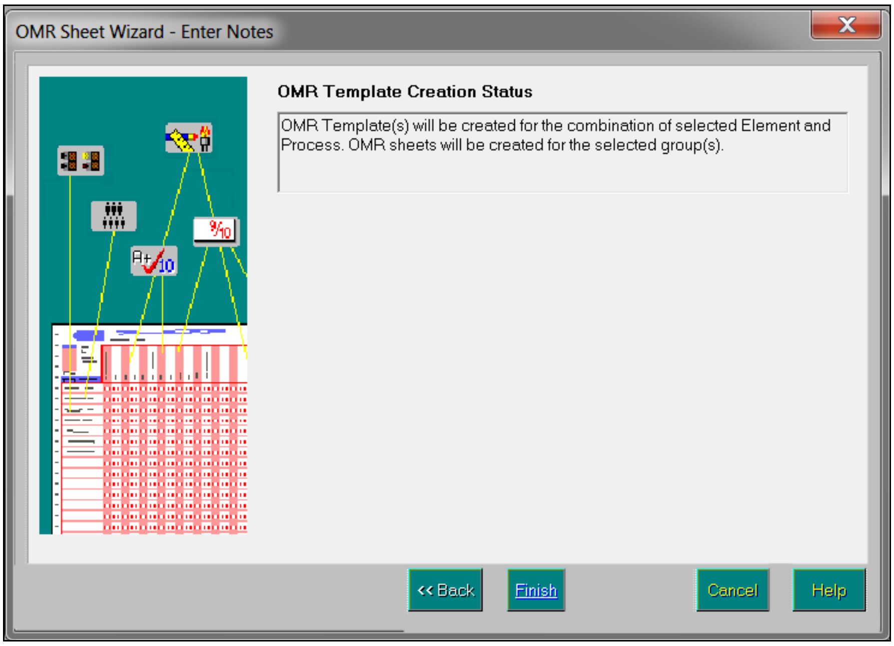
    *Field Browser button*

   The templates available are identical to the names of previously created OMR sheets.

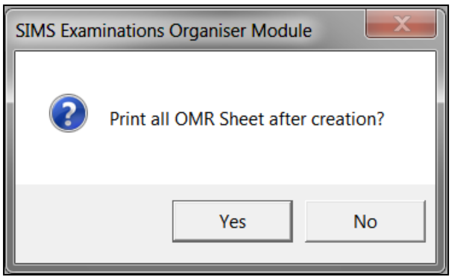
3. Click the **Next** button to display the **Select Groups** page.



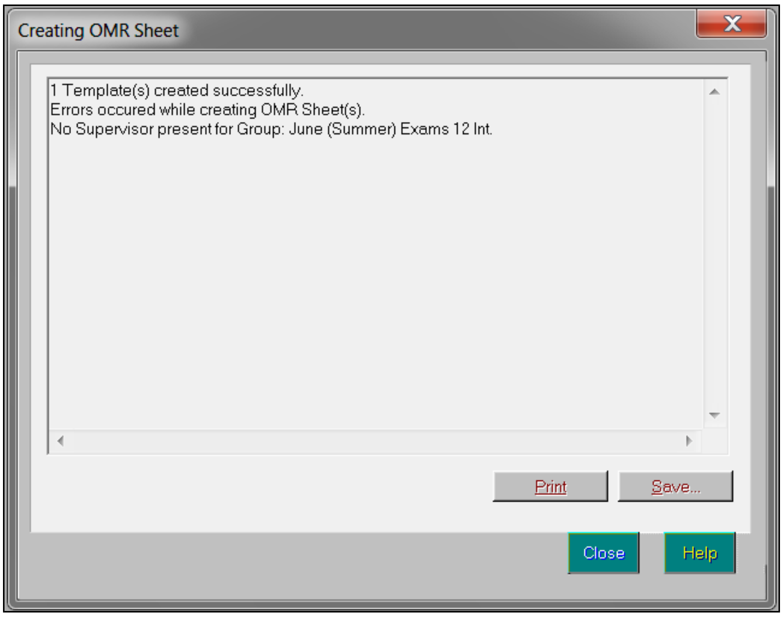
4. Using the navigation tree, select the source of examination candidates from which you wish to populate the OMR sheet. Select **Course**, **Exam Season Candidates** or **National Curriculum Year**.
5. Click the **Next** button to display the **Enter Notes** page.



6. Click the **Finish** button and confirm whether you wish to automatically print all OMR sheets after creation.



7. As the OMR sheets are being created, the **Creating OMR Sheet** dialog is displayed.



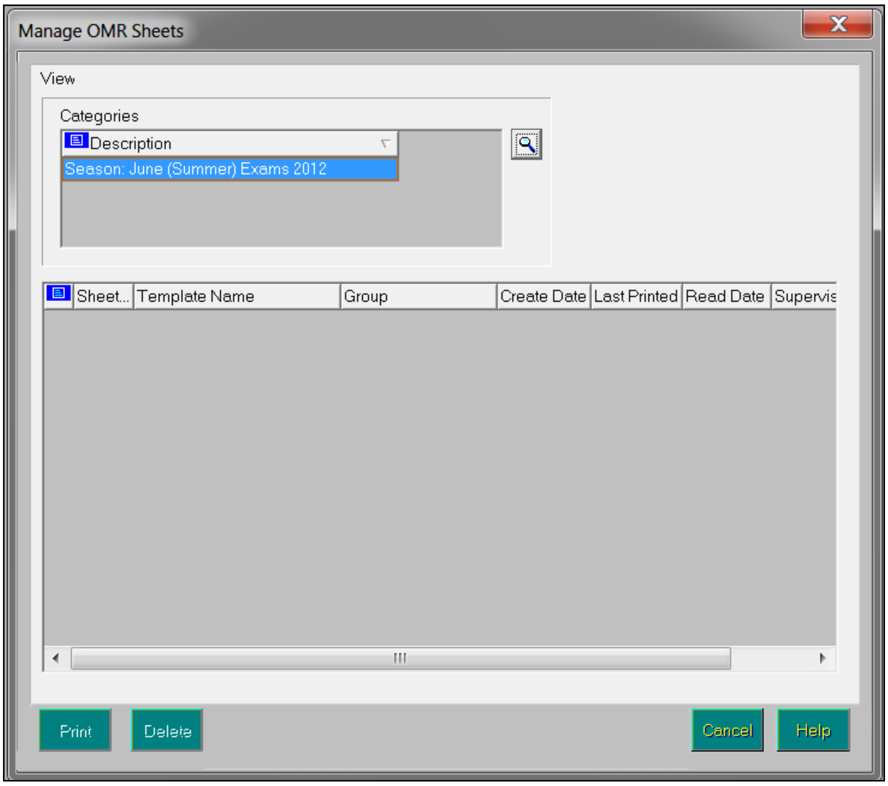
8. Any errors encountered during the creation of the OMR sheets are displayed. These errors can be printed or saved by clicking the appropriate buttons.
9. Click the **Close** button to complete the process. These OMR sheets can then be used by selecting **Tools | Manage OMR Sheets**.

> *NOTE: Unlike a marksheet, where the list of candidates displayed is that which is current on the date selected, the list of candidates on an OMR is not dynamic – it represents the membership of the selected group on the first day of the season.*
>
> *Furthermore, again unlike a marksheet, it is not filtered against membership of the season candidates group. This is to protect you from the situation where a large number of OMR sheets are printed, only to discover that not all of the candidates that you intended to assign have been assigned. Be aware however that this does permit you to enter candidates for examinations who are not assigned to the season, which may cause unexpected problems at submission time.*

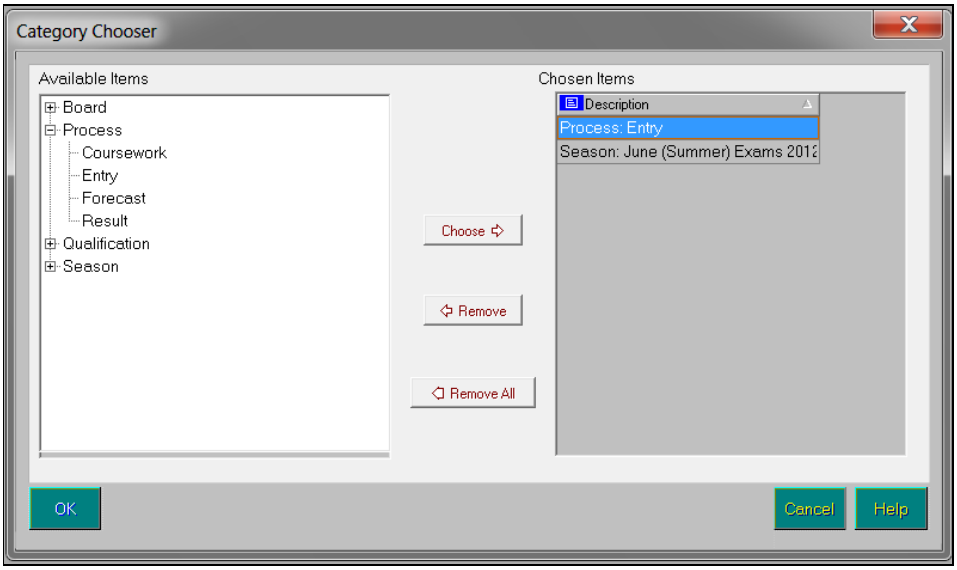
More Information:
Creating OMR Sheets at the Same Time as a Template on page *38*

Printing and Deleting OMR Sheets

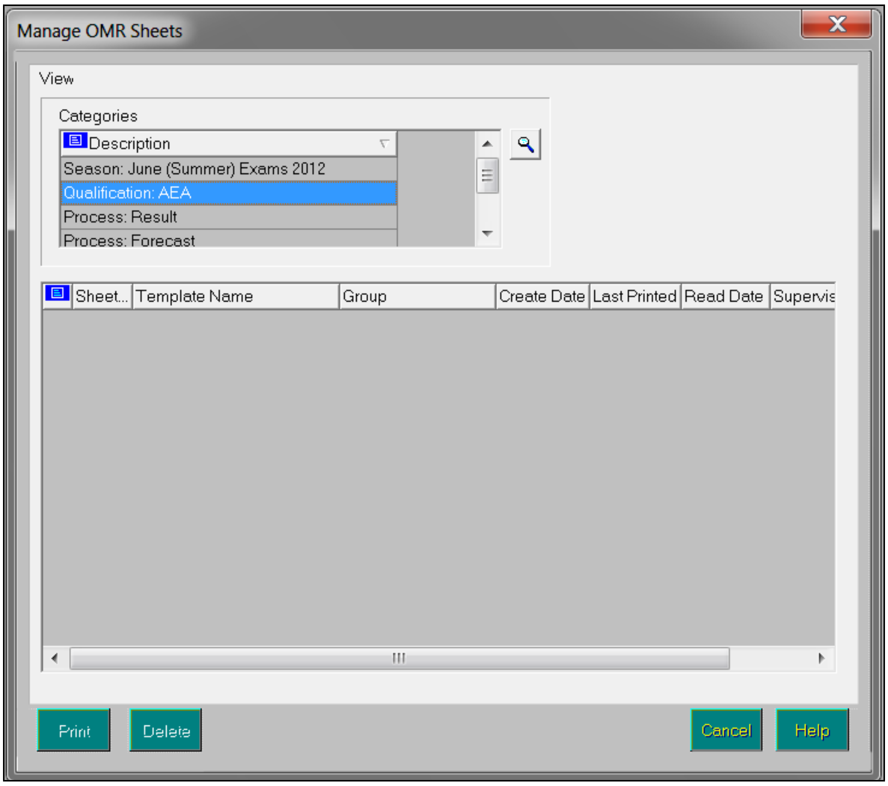
1. Select **Tools | Manage OMR Sheets** to display the **Manage OMR Sheets** dialog.



2. To populate the dialog with the appropriate selection of OMR sheets, click the **Categories** Field Browser button to display the **Category** chooser.



3. Select the appropriate category or categories with which the required OMR sheets are associated. For example, you may want to select the **Process** category you selected when previously creating the OMR sheet.
4. Click the **OK** button to confirm your choice and return to the **Manage OMR Sheets** dialog. The categories selected are displayed in the **View** panel, together with details of the OMR sheets associated with the selected categories.



Printing OMR Sheets

1. Select the check boxes of the OMR sheets you wish to print. Multiple check boxes can be selected, if required.
2. Click the **Print** button to print the selected OMR sheets.
3. Once the required OMR sheets have been sent to the selected printer, the **Print OMR Sheets** dialog is displayed, confirming the OMR sheets that have been printed. This list can be printed or saved as required.
4. Click the **Close** button to close the dialog.

Deleting OMR Sheets

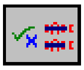
1. Select the check boxes of the OMR sheets you wish to delete. Multiple check boxes can be selected, if required.
2. Click the **Delete** button to delete the selected OMR sheets.
3. If any of the selected OMR sheets have been printed but not yet read into Examinations Organiser, a dialog is displayed asking you to confirm whether you wish to continue with the deletion. Once deleted, sheets cannot be read.

4. Once the OMR sheet deletion has completed successfully, the **Delete OMR Sheets** dialog is displayed, confirming the OMR sheets that have been deleted. This confirmation message can be printed or saved as required.
5. Click the **Close** button to close the dialog.

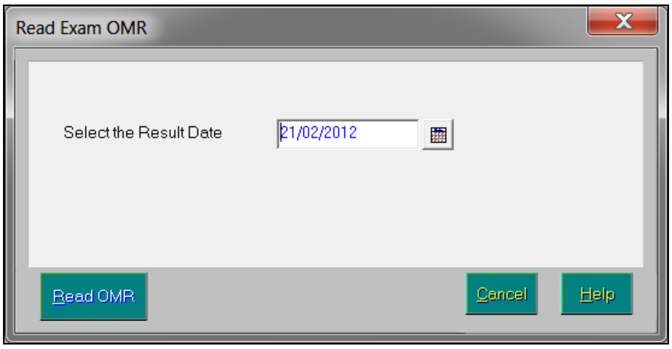
Reading OMR Sheets

The method for reading OMR sheets varies slightly depending on whether the Optical Mark Reader has a manual sheet feed (sheets are fed through individually) or automatic sheet feed (sheets are fed through in batches). If you are using an OMR with automatic sheet feed, rejected sheets are stored in a separate tray enabling the read process to continue.

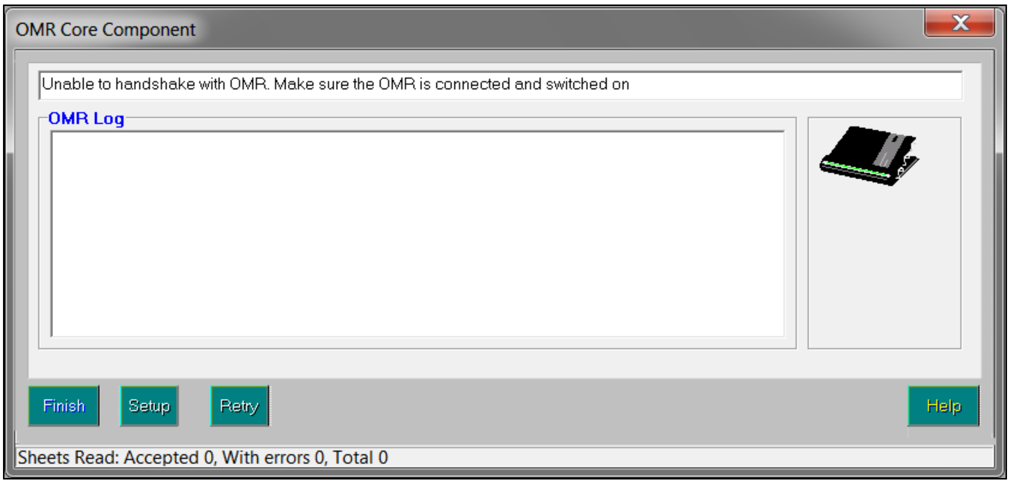
1. Ensure the OMR is connected and switched on.
2. Click the **OMR Read** button to display the **Read Exam OMR** dialog.



OMR Read button



3. The **Select the Result Date** field (i.e. the date the result is entered) defaults to the current date. To change it, enter the date on which you are reading the OMR sheet or select the required date by clicking the **Calendar** button to display the calendar.
4. Click the **Read OMR** button to display the **OMR Core Component** dialog.



The system attempts to communicate with the OMR. An error message is displayed if communication fails (please see *Unable to Handshake with OMR* on page *152*).

5. Start the process of feeding in the OMR sheets (the method will depend on the type of OMR your school is using).

   The total number of sheets read is shown at the bottom of the dialog. In addition, details about the individual sheets, including sheet number and whether it was successfully read or rejected, is also shown.

   Once the results have been fed in through the OMR they can be viewed/edited in any marksheet containing the relevant aspect(s). Or, if necessary, you can create a new template and marksheet to view/edit the results.

   Any problems that occur are shown in the **OMR Log panel**. The **Error Log** can be printed if required, when the read process is complete. If for any reason an OMR sheet cannot be read through the Optical Mark Reader, the results may be entered through a marksheet.

Editing Results Entered via the OMR

Once results have been entered into the system through the OMR they can be edited:

- through a relevant marksheet; or
- by re-reading the relevant OMR sheet, using the same result date.

05| Registering Candidates for Examinations

Introduction 51
Creating Marksheets at the Same Time as a Template 52
Creating Marksheets Using Existing Templates........ 57
Batch Creation of Marksheets 59
Adding and Entering Data in Marksheets 62
Navigating Around the Marksheet........ 62
Selecting a Value for a Column 62
Entering Grades, Forecast Grades and Marks for Individual Candidates........ 66
Restoring Saved Column Values........ 67
Viewing the Properties of a Column........ 68
Restoring the Original Column Order 68
Clearing the Contents of a Column........ 68
Copying and Pasting Data 68
Adding Notes 69
Changing the Display Order 69
Changing the Column Width 70
Printing and Exporting Marksheets........ 70
Deleting Marksheets 72

Introduction

The process for registering candidates for external examinations involves entering forecast grades for each potential candidate (both internal and external).

This is achieved by providing teachers with a list of candidates (in rows), together with the potential examinations that they can sit. This list is known as a marksheet. Each teacher will then enter a character to indicate that the candidate should be entered for that examination.

The whole process uses functionality from SIMS Assessment including aspects and marksheets.

What are Aspects?

An aspect is any assessable task or event. When basedata is imported into the module, aspects are automatically generated in preparation for recording all the necessary examinations data including:

- to hold an indication of entry
- to hold predicted grades
- to store grades or marks
- to record coursework marks or grades
- to record final results
- to record the results of any endorsement

Once created, aspects can then be grouped together and included in a marksheet, according to your requirements.

What are Marksheets?

Marksheets consist of a grid, similar to a spreadsheet, where the areas of assessment (aspects) are listed in columns and candidates are listed in rows. Marksheets can be used to record and review a variety of examination data and can be likened to a teacher's mark or record book.

A marksheet could contain columns for three options, of which each candidate will be included in only one, together with a column for the syllabus in which an estimated grade will be recorded.

Alternatively, a marksheet might have columns for three units and any candidate could be included with an estimated grade in any or all of the columns.

Marksheets are created using templates. Once created, they can be made available to class teachers, enabling them to indicate which candidate is entering which examination. Marksheets can be completed via Examinations Organiser or printed for teachers to complete manually and then entered into the module by the Examinations Officer.

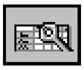
What are Templates?

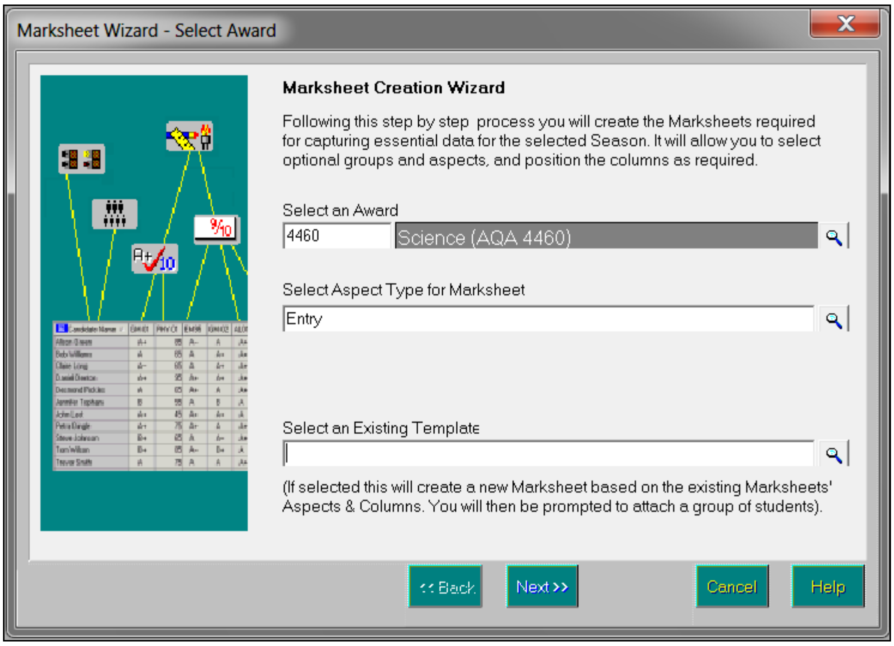
Marksheets can be generated using a previously defined template, which determines the aspects (columns) that will be included in the resulting marksheet. By associating a template with one or more groups, it is possible to create a set of marksheets (one per group) containing the aspects (columns) defined in the template. A template is the definition of a set of columns that will be merged with a group of candidates to produce a marksheet.

Creating Marksheets at the Same Time as a Template

This method creates a marksheet based on the selections made in the **Marksheet** wizard and in doing so, creates a template that can subsequently be used to recreate the marksheet at a later date. This would be particularly useful if, having created marksheets for classes, you later want to use the same template for the corresponding course. The data within a marksheet is saved separately and therefore when a marksheet is deleted, the data is retained.

1. Click the **Marksheet Setup** button or select **Focus | Marksheet Setup – Award** to display the **Marksheet** wizard. The **Select Award** page is automatically selected.

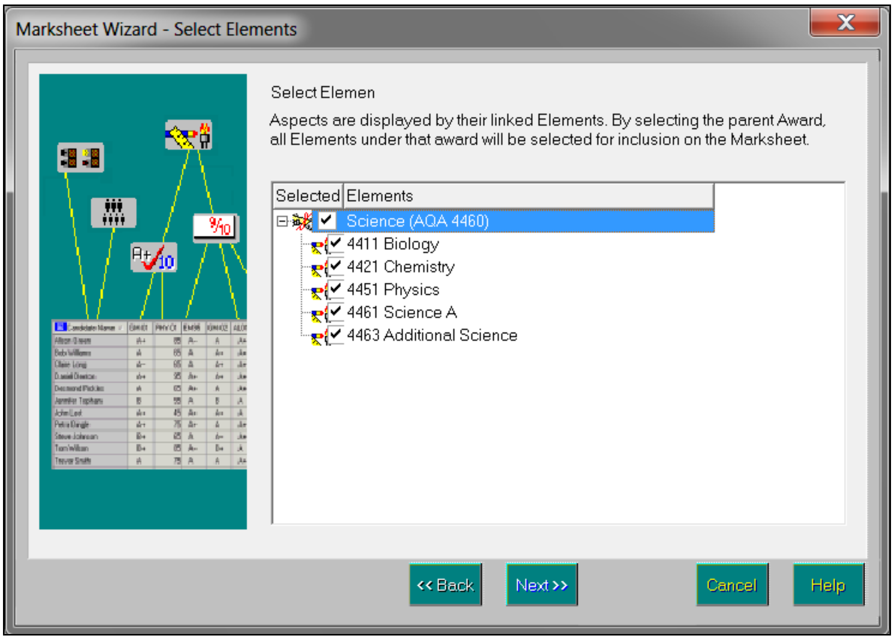
    *Marksheet Setup button*

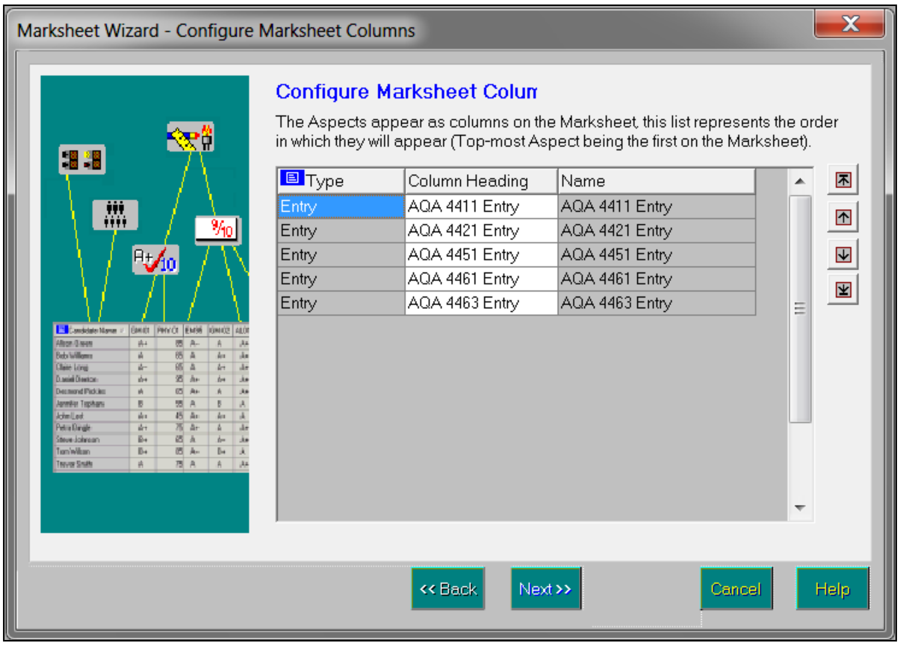
2. Select an **Award** on which you want to base the marksheet by clicking the **Field Browser** button and selecting the appropriate award from the drop-down list.

   The awards displayed are those imported as part of the basedata for the current season and those that have been created manually.
3. Select the **Aspect Type** to use for the marksheet by clicking the **Field Browser** button and selecting the appropriate aspect type from the drop-down list. The options include **Coursework**, **Endorsement**, **Entry**, **Equivalent**, **Forecast** and **Result**.

4. Click the **Next** button to display the **Select Elements** page.



5. Select the **Award** check box (top level) to select the award and all of its associated elements to include on the marksheet. Alternatively, you can select any combination of elements (second level) to include in the marksheet by selecting the appropriate **Element** check box(es).
6. Click the **Next** button once the required elements have been selected for inclusion to display the **Configure Marksheet Columns** page.



The marksheet **Type** selected on the first page of the wizard is displayed along with the name of the aspect.

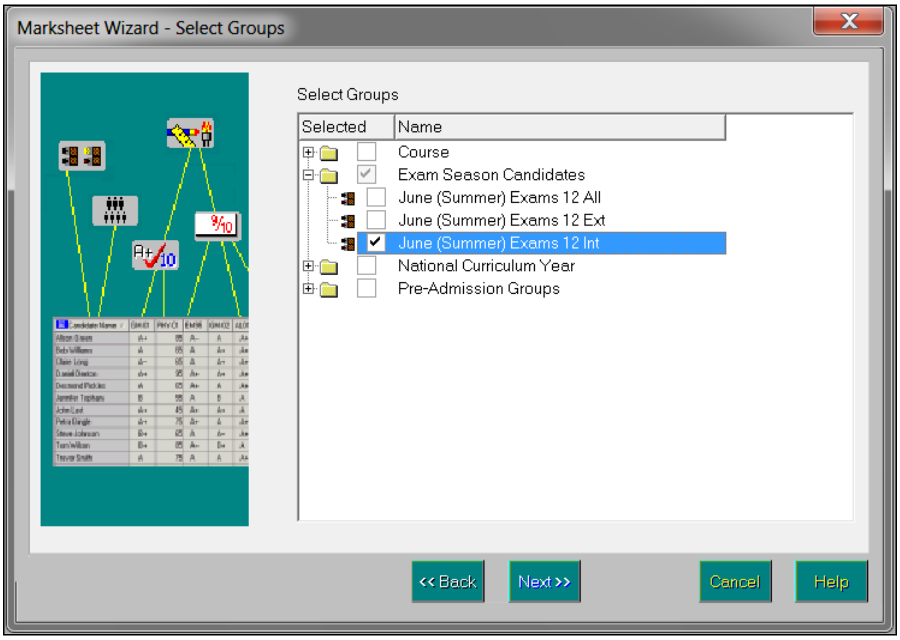
The **Column Heading** is editable, enabling it to be renamed according to your requirements.

Use the buttons on the right-hand side of the page to manoeuvre the columns to the correct order. The aspect at the top of the list is displayed on the left-hand side of the resulting marksheet.

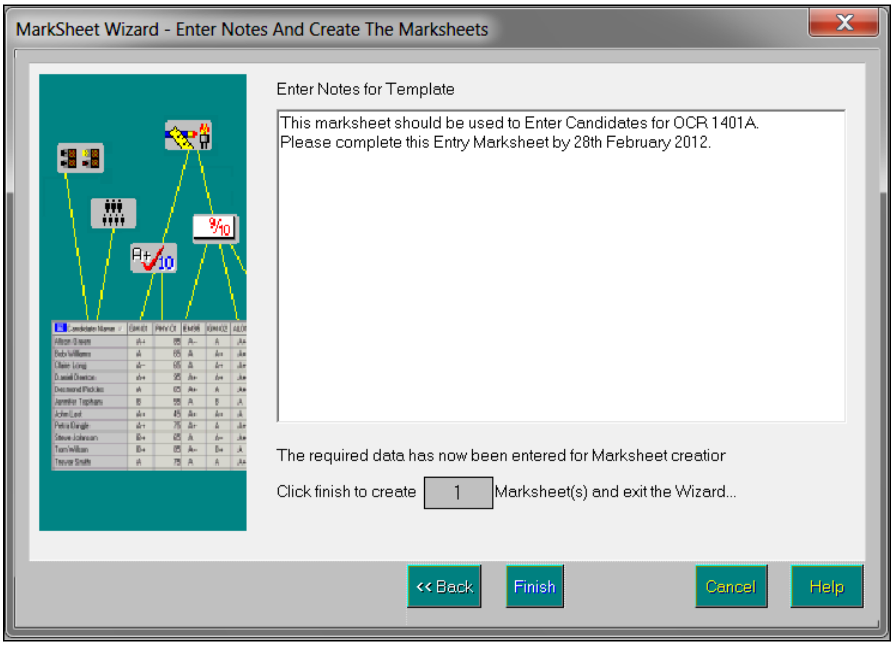
*NOTES: If you selected an **Aspect Type** of **Entry by Forecast Grade** on the first page of the wizard, both a Forecast Grade and Entry aspect for each element attached to the selected award are displayed in alternating columns in the marksheet. The column order for an Entry by Forecast Grade aspect type cannot be altered.*

Marksheets for Entry by Forecast Grade will function correctly only in Examinations Organiser. The inference that a forecast also means an entry requires additional code that is not present in SIMS Assessment or SIMS. Exams Officers who want to make this facility available to class teachers will need to ensure that they have Class Teacher access to Examinations Organiser.

7. Click the **Next** button to display the **Select Groups** page.
8. Using the navigation tree, select the group of examination candidates from which to populate the marksheet. Select **Course**, **Exam Season Candidates** or **National Curriculum Year**.



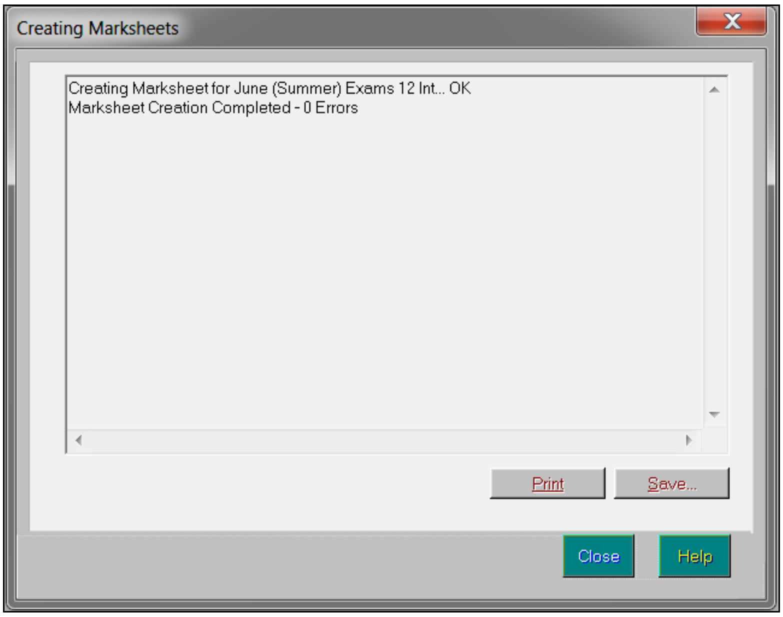
9. Click the **Next** button to display the **Enter Notes And Create The Marksheets** page.



10. Enter the appropriate notes for the template, which is displayed on each marksheet associated with this template. These notes may include an overview of the purpose of the marksheet as well as guidance notes on the date by which the marksheets should be completed.

    The number of marksheets that are created is displayed at the bottom of the page. This refers to the number of aspects selected for inclusion in the marksheet.

11. Click the **Finish** button to display the **Creating Marksheets** dialog and to create the selected marksheets.



Any errors encountered are displayed. The errors can be printed or saved by clicking the appropriate buttons.

12. Click the **Close** button. The marksheets can be used by selecting **Focus | Marksheet – Data Entry**.

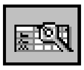
More Information:
Creating Marksheets Using Existing Templates on page *57*

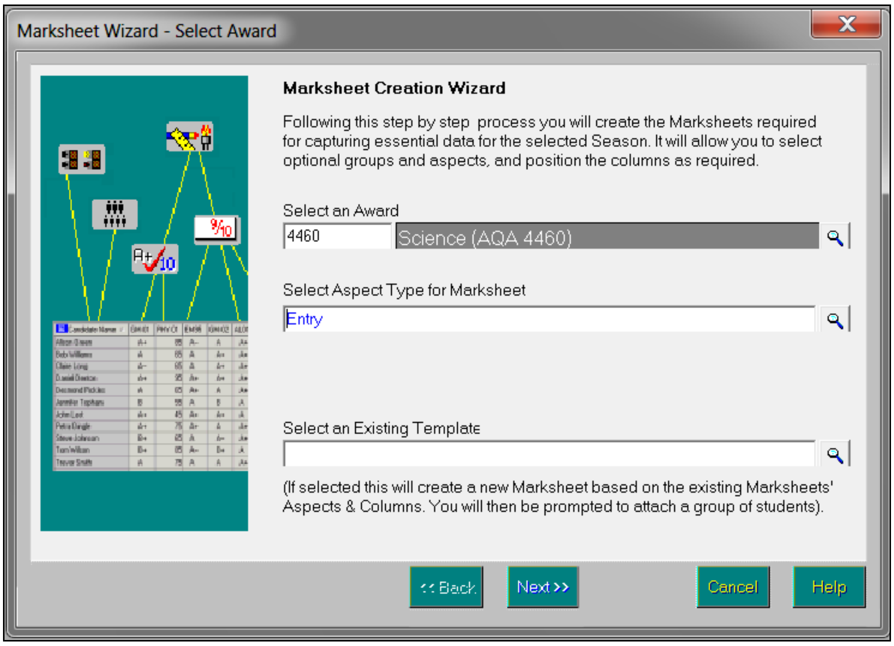
Creating Marksheets Using Existing Templates

This method creates a marksheet based on a previously created template and removes the need to continuously recreate identical marksheets. The data within a marksheet is saved separately and therefore when a marksheet is deleted, the data is retained.

When creating marksheets using existing templates, the **Marksheet** wizard enables you to select the groups on which you want to base the marksheet. It does not enable you to select the required aspects or to position the columns, as this would have been defined when the template was created. The existing template notes can be edited as required.

1. Click the **Marksheet Setup** button or select **Focus | Marksheet Setup – Award** to display the **Marksheet** wizard. The **Select Award** page is automatically selected.


Marksheet Setup button

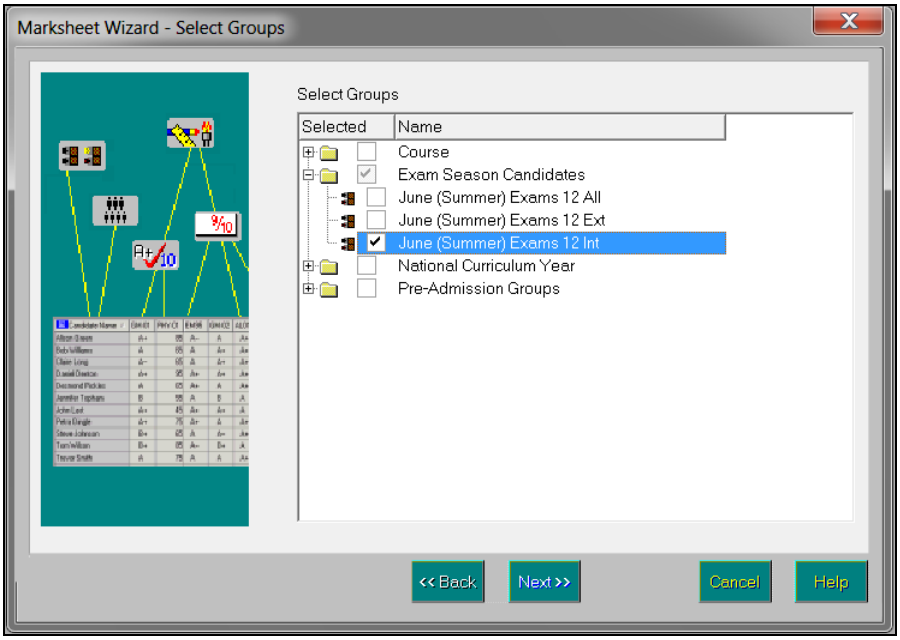


2. **Select an Existing Template** on which you want to base the marksheet by clicking the **Field Browser** button and selecting the existing template from the drop-down list.

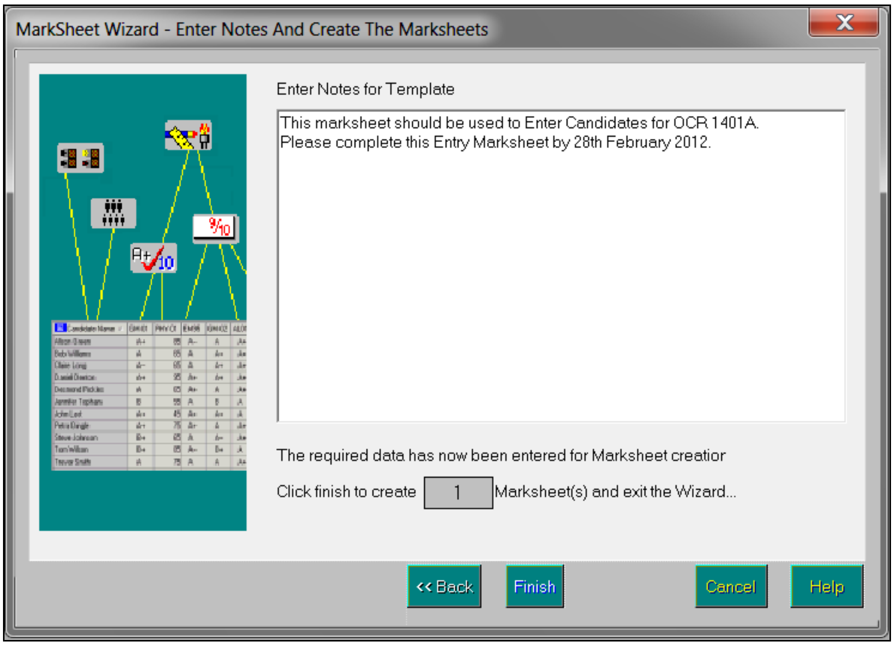
   The templates available are identical to the names of previously created marksheets.

3. Click the **Next** button to display the **Select Groups** page.

4. Using the navigation tree, select the source of examination candidates from which to populate the marksheet. Select **Course**, **Exam Season Candidate** or **National Curriculum Year**.



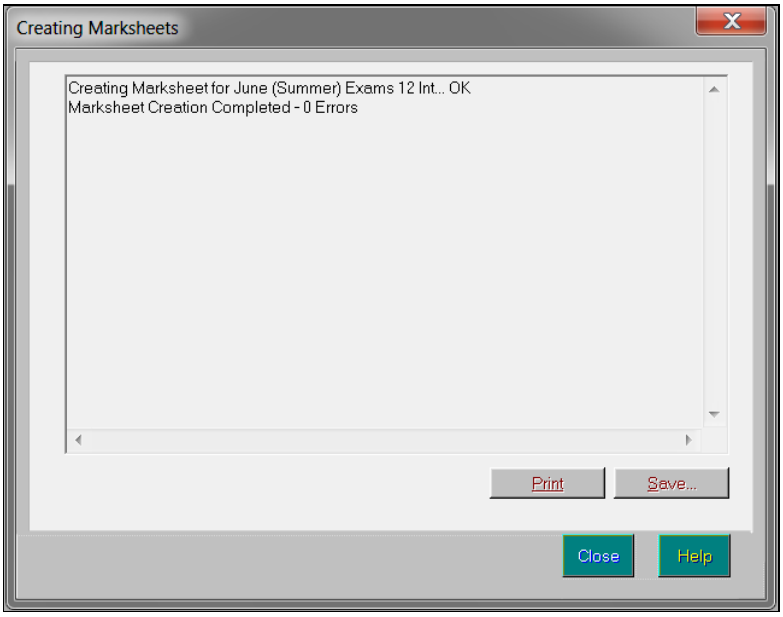
5. Click the **Next** button to display the **Enter Notes And Create The Marksheets** page.



Edit the template notes if required, which are displayed in all subsequently generated marksheets. These notes may include an overview of the purpose of the marksheet as well as guidance notes on the date by which the marksheets should be completed.

The number of marksheets that are created is displayed at the bottom of the page. This refers to the number of aspects selected for inclusion in the marksheet.

6. Click the **Finish** button to display the **Creating Marksheets** dialog and to create the selected marksheets.



Any errors encountered are displayed. The errors can be printed or saved by clicking the appropriate buttons.

7. Click the **Close** button. The marksheets can be used by selecting **Focus | Marksheet – Data Entry**.

More Information:
Creating Marksheets at the Same Time as a Template on page *52*

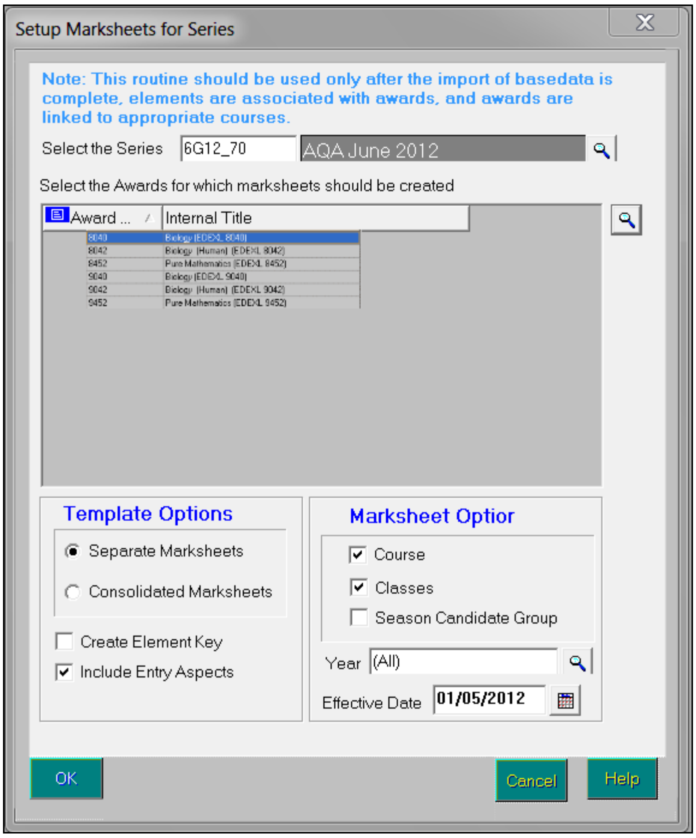
Batch Creation of Marksheets

This enables templates and marksheets for a series to be created as a batch process, rather than individually.

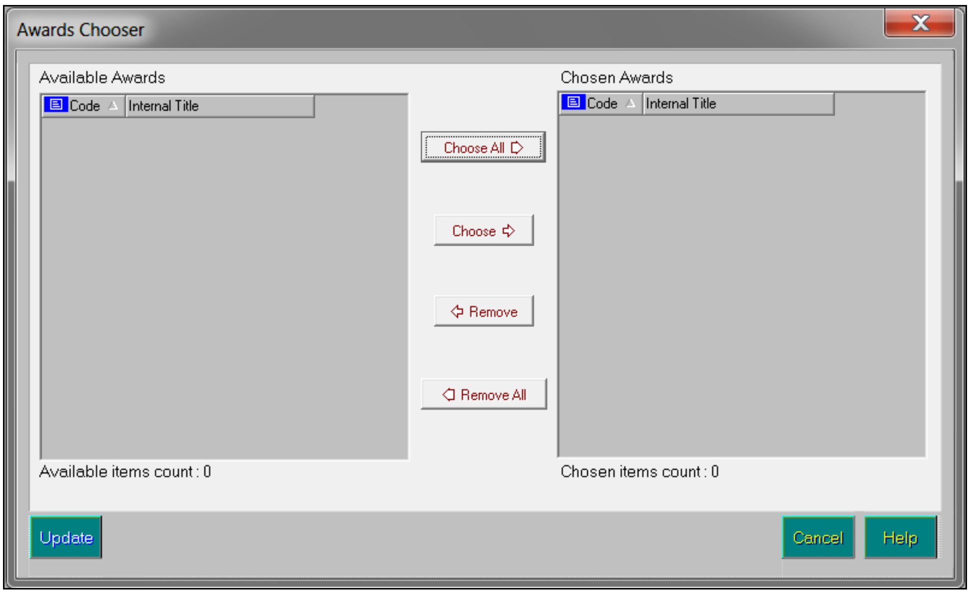
Before starting this procedure, you must ensure that the structure of the basedata is complete and correct. To do this, please ensure that:

- all of the required elements have been imported and ensure that Heads of Departments have signed off their requirements.
- all elements are associated with awards in the appropriate way.
- the awards for which marksheets will be created are associated with courses.
- the courses are linked to the appropriate classes. This can be confirmed by opening **Marksheet Setup – Award** and checking that courses expand as expected.

1. Select **Focus | Marksheet Setup – Series** to display the **Setup Marksheets for Series** dialog.



2. Click the **Select the Series** Field Browser button and select the series for which you want to create marksheets. The selection of series is limited to those that belong to the currently selected season.
3. Click the **Field Browser** button adjacent to the list of awards to display the **Awards** chooser.



The list of awards displayed are those associated with the selected series and linked with courses.

4. Select the required awards by clicking the **Choose** or **Choose All** buttons. awards selected in error can be removed from the list by clicking the **Remove** or **Remove All** buttons.
5. Click the **Update** button to return to the **Setup Marksheets for Series** dialog.
6. In the **Template Options** panel, select either the **Separate Marksheets** or **Consolidated Marksheets** radio button.

   If you select the **Separate Marksheets** radio button, separate marksheets are created for entries, forecasts, results, endorsements and equivalents. However if you select the **Consolidated Marksheets** radio button, the entire life cycle of the elements are displayed on a single marksheet.
7. Select the **Create Element Key** check box if you want to compile a list, within the template notes, of all of the elements included, with their title indicated against the code.
8. Select the **Include Entry Aspects** check box if you want to include read-only entry columns for forecast and result marksheets.

   > *NOTE: This option is available only if you have selected the* ***Separate Marksheets*** *radio button.*
9. In the **Marksheet Options** panel, select any combination of the **Course**, **Classes** and **Season Candidate Group** check boxes. The **Course** and **Classes** check boxes are selected by default.
10. Click the **Year** button and select the required year. This limits the classes to those belonging to the selected year.
11. Enter the **Effective Date** or click the **Calendar** button and select the date. This governs both the course and classes links, and the inclusion of classes depending on their membership. They must have members in common with the season candidates group on the Effective Date.

    The explicit selection of awards provides a degree of control over how different kinds of awards are to be processed. For example, if you have awards that consist only of a couple of options (Foundation and Higher, for example), you might decide that it would be more appropriate to present these as consolidated marksheets because the whole marksheet might comprise only six or eight columns. On the other hand, where you have awards consisting of 10 items (Units and Certifications), you might decide that the resulting 40-column width is excessive, and instead present these as separate marksheets. Splitting the operation in two enables you to cater for this differential.

    Similarly, if you are offering Modular Science and/or Maths, which involve both Year 10 and Year 11, but other subjects involve only Year 11, you can create your modular awards with Year (All), and thus get your Year 10 and 11 classes for these subjects (other years will not be included because these two are the only ones with members on the GCSE courses). You can then go around again, selecting all the other subjects, and set Year to 11.

If the system detects that a template or marksheet already exists, having perhaps been created earlier as part of a single-award process, it will not be duplicated. However, you are informed at the end of the process how many templates and marksheets have been created, and how many have not been created because they already exist.

Adding and Entering Data in Marksheets

Marksheets consist of a grid, similar to a spreadsheet, where the areas of assessment (aspects) are listed in columns and candidates are listed in rows. Marksheets can be used to record and review a variety of examination data and can be likened to a teacher's mark or record book. Marksheets are created by designing a *template*.

Marksheets are made available to the supervisor(s) of the group of candidates contained within the marksheet. If appropriate permissions have been assigned, each supervisor can complete their own marksheets. Alternatively, printed copies can be manually completed and results entered by a user with permissions to enter data in all marksheets, e.g. the Examinations Officer.

Navigating Around the Marksheet

Once you have altered the marksheet display according to your requirements, you are ready to enter data. You can move around the marksheet using any of the following methods:

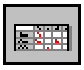
- click in a cell to enter data.
- press the **Right** cursor key to move one cell to the right.
- press the **Left** cursor key to move one cell to the left.
- press the **Up** cursor key to move up one cell.
- press the **Down** cursor key to move down one cell.
- press the **Tab** key to move one cell to the right.
- press **Shift + Tab** move one cell to the left.
- press the **Enter** key to move down one cell.
- press **Page Up** and **Page Down** to move up and down the grid in steps equal to the number of rows that can be displayed on the screen.
- press **Ctrl + Home** to move to the top left cell of the grid.
- press **Ctrl + End** to move to the bottom right cell of the grid.

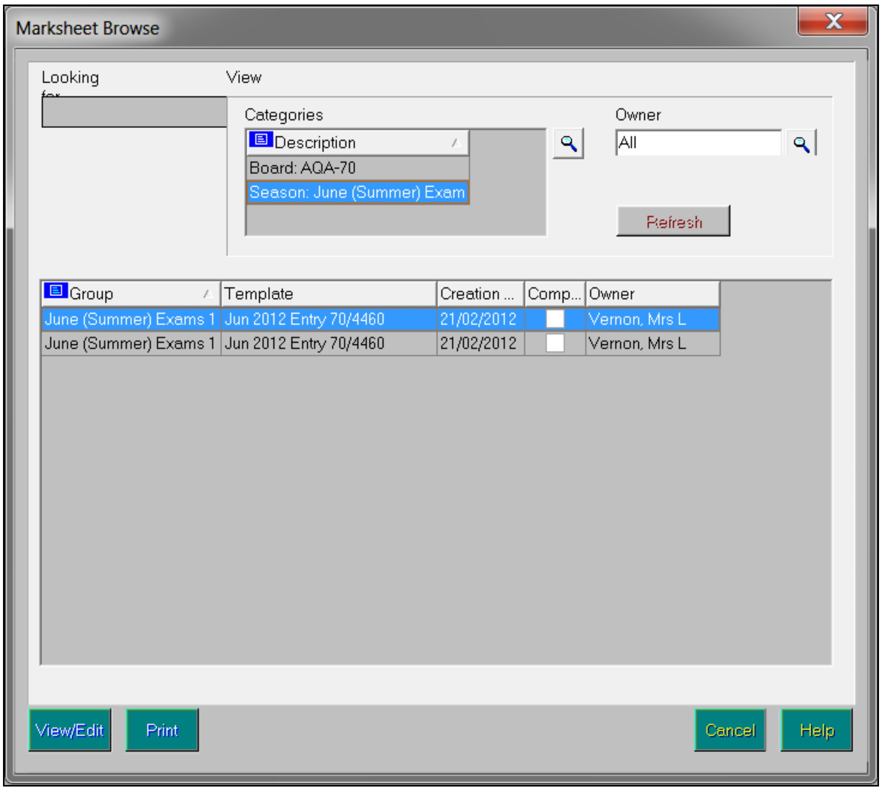
Selecting a Value for a Column

This would be particularly useful if you wish to default the grade or mark, etc. for each candidate to a given value, if you perceive that one particular value is common for most candidates. Selecting **Default** from the **Select a grade** drop-down list will fill the column with this value. Ad hoc changes can subsequently be made to individual grades, etc.

This method can be used to save you from repeatedly entering the same grade for numerous candidates as you will only have to edit the exceptions.

1. Click the **Marksheet** button or select **Focus | Marksheet – Data Entry** to display the **Marksheet** browser.

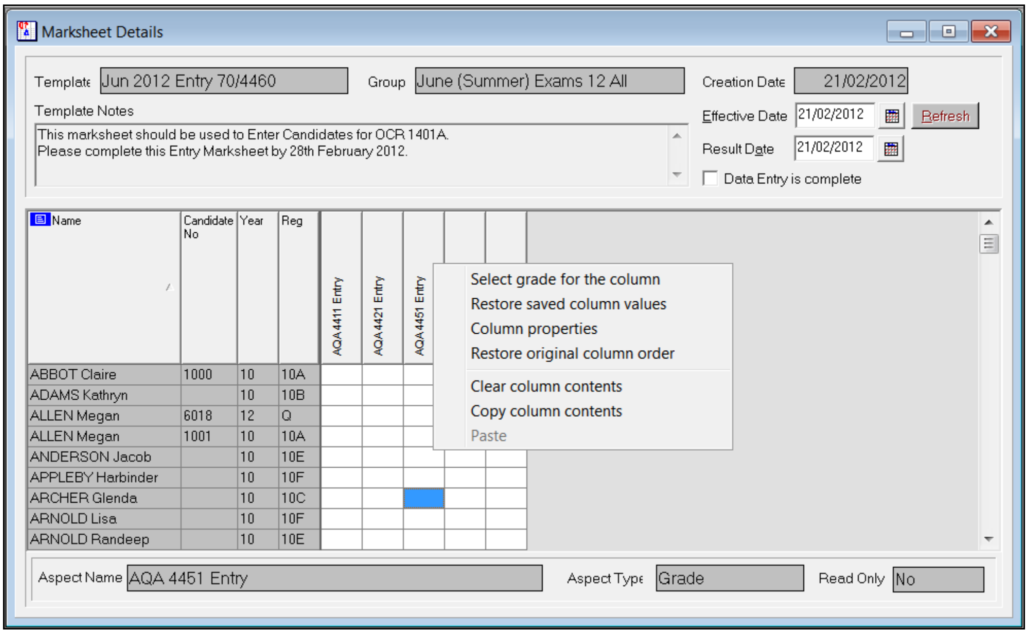
 *Marksheet button*



2. Use the viewing tools in the top part of the **Marksheet** browser to filter the list of marksheets as required and click the **Refresh** button to display the marksheets that match the search criteria.

> *NOTE: If you have been granted the **View All Marksheets** permission and select **All** from the **Owner** list, the selected marksheet opens in read-only mode. To edit your own marksheets, you should select your name from the **Owner** list.*
>
> *If you have been granted the **Edit All Marksheets** permission, on selecting a marksheet for which you are not the owner, you are warned that if you update any grades or marks then you are assigned as the owner.*

3. Highlight the marksheet to be edited and click the **View/Edit** button to display the **Marksheet Details** form.

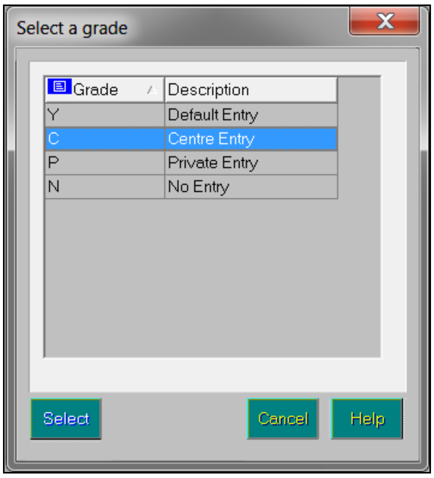


The **Effective Date** defaults either to today's date or the start date of the current season but can be edited, if required by selecting from the **Calendar**. For example, if the season start date is a date in the future, (e.g. June 201n season with season start date 01/05/1n and today is 21/04/201n) the **Effective Date** defaults to today's date. If the season start date has already passed, (e.g. June 201n season with season start date of 01/04/1n) the **Effective Date** defaults to the season start date. The candidates listed in the marksheet are those who were a member of the selected group on that date.

4. Click the **Calendar** button adjacent to the **Result Date** field to select the date on which the results, forecast, coursework marks, etc. were *attained* or *decided*.

> ***IMPORTANT NOTE:*** *The result date does <u>not</u> refer to the date on which entries, forecast grades, coursework marks, etc. were entered onto the marksheet.*

5. Right-click the column header to assign a default value to and select **Select grade/mark for the column** from the pop-up menu to display the **Select a grade** dialog.



6. Highlight the required grade or mark and click the **Select** button to confirm your choice.

   The selected value is displayed in red type in the highlighted column. The red type signifies data that has not yet been saved.

   Special Cases:

   - Entries

     When entering data in entries marksheets, the following options are available:

     Y Yes, the candidate is entered for the examination. This code is interpreted at query time according to the Centre default entry type specified in the **School Details** dialog.

     C The candidate is treated as a Centre-funded entry, regardless of the default entry type specified in the **School Details** dialog.

     P The candidate is entered for the examination as a Private candidate.

     N The candidate is not entered for the examination (same as blank) or a request for the candidate to be withdrawn from the examination (if an entries file has already been submitted to an examination board).

     <Blank> The candidate is not entered for the examination.

     *NOTE: If you are editing an Entry by Forecast Grade marksheet, both a Forecast Grade and Entry aspect for each element attached to the selected award are displayed in alternating columns in the marksheet. Entering a Forecast Grade in an appropriate cell will automatically populate the Entry aspect with a **Y**, denoting an entry is to be made.*

- Coursemarks

  Every coursemark must be accompanied by a status. This will generally be **V**, but a non-zero mark may be declared as **E** (educated elsewhere or parent assessed). **0** must be explained as **Z** (a genuine zero mark recorded), **A** (absent for this component), **M** (missing mark or grade) or **N** (no work available at present). These codes are explained on pages 20-21 in the Formats book.

  A special case is **F** (coursework carried forward). Such marks should be entered as **0**, with status **F**. The Formats book specifies that the form of submission should be **F<space><space><space>**. The conversion from **0** to spaces is performed by the submission routine itself.

7. Click the **Save Record Changes** button.

   The values set as default are displayed in black text to indicate that the data has been saved.

More Information:
Entering Grades, Forecast Grades and Marks for Individual Candidates on page *66*

Entering Grades, Forecast Grades and Marks for Individual Candidates

You may wish to do this, for example, if the selected group of candidates carry a diverse range of forecast grades. In this case, there would be no benefit in setting a default grade and editing the exceptions, as there would be so many exceptions. This also gives you greater control over the data entered in a marksheet and you can be more assured that the appropriate and correct grade is being specified for each individual candidate.

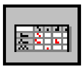
Ad hoc changes can subsequently be made to individual grades, etc. but this method can be time consuming as you are entering a result for every single candidate. If a large number of the selected group share a common grade, for example, you may prefer to set a default grade for the column and edit the exceptions.

IMPORTANT NOTE: *If an embargo has been set for the current season to disable the viewing or examination related data for a defined period of time, and you are currently in the embargo period, only authorised personnel can view marksheets for the current season.*

Additional Resources:

Setting Up the Results Embargo for Results Download Days in the in the *Setting up Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook

1. Click the **Marksheet** button or select **Focus | Marksheet – Data Entry** to display the **Marksheet** browser.



Marksheet button

2. Use the viewing tools in the top part of the **Marksheet** browser to filter the list of marksheets as required and click the **Refresh** button to display the marksheets that match the search criteria.

> *NOTE: If you have been granted the **View All Marksheets** permission and select **All** from the **Owner** list, the selected marksheet are opened in read-only mode. To edit your own marksheets, you should select your name from the **Owner** list.*
>
> *If you have been granted the **Edit All Marksheets** permission, on selecting a marksheet for which you are not the owner, you are warned that if you update any grades or marks then you are assigned as the owner.*

3. Highlight the marksheet you wish to edit and click the **View/Edit** button to display the **Marksheet Details** form.
4. Click the **Calendar** button adjacent to the **Result Date** field to select the date on which the results, forecast, coursework marks, etc. were *attained* or *decided*.

> ***IMPORTANT NOTE:*** *The result date does <u>not</u> refer to the date on which entries, forecast grades, coursework marks, etc. were entered onto the marksheet.*

5. Click the cell into which you wish to enter a grade or mark and enter the appropriate value.

   If an invalid grade or mark is entered, you are asked to select a valid entry from the list. To manually view a list of valid grades, right-click the column heading and select **Column properties** from the pop-up menu.
6. Press the **Enter** key to confirm the value entered.

   The selected value is displayed in red type in the highlighted column. The red type signifies data that has not yet been saved.
7. Repeat steps 4-5 until you have entered as many grades or marks as you wish.
8. Click the **Save Record Changes** button.

   The values entered are now displayed in black text to indicate that the data has been saved.

Restoring Saved Column Values

If you have edited a set of grades or marks for a group of candidates and, before saving these details, realise that the values have been edited incorrectly, you can revert to the values as they were at the time the data was last saved.

1. Right-click the column header for which you wish to restore the values and select **Restore saved column values** from the pop-up menu.

> *NOTE: This function restores the column results from the database. Any changes made to the data since the last save are lost.*

2. If you wish to restore the values, click the **Yes** button.

The column reverts to the values stored in the database, overwriting the existing values.

3. Click the **Save Record Changes** button.

Viewing the Properties of a Column

1. Right-click the column header for which you wish to view the properties and select **Column properties** from the pop-up menu to display the **Properties of Column** dialog.

   The **Aspect** associated with the column is displayed as well as the **Aspect description**, a list of valid grades, the column **Status** (read-only, data entry, etc.) and the **Result Set Status** (locked, unlocked, etc.).

2. Click the **Close** button to return to the **Marksheet Details** form.

Restoring the Original Column Order

It is possible to revert the display order of the column to its original value i.e. the order specified by the template.

Right-click the column header to restore the original order and select **Restore original column order** from the pop-up menu.

The column order reverts to the predefined order.

Clearing the Contents of a Column

Clearing the contents of a column is particularly useful if, as planned, the marksheets created are used year-on-year. Using this method, you can clear the values from previous years and enter the new values from scratch.

> *NOTE: If you clear the contents of a column and save the marksheet before entering all of the new values, the original column values are restored, i.e. the values from last year, for cells in the marksheet whose contents are blank.*

Another reason for using this area of functionality is for occasions when you have entered values in a column for a group of candidates and later believe that the majority have been entered incorrectly. You will therefore need to clear the column contents so that you can re-enter the values from scratch.

Right-click the column header and select **Clear column contents** from the pop-up menu.

Copying and Pasting Data

Copying and pasting either individual cells or entire columns can reduce the amount of time taken to enter your examinations data.

It is possible to copy the contents of a cell or a column to the Windows® clipboard so that it can be pasted into another column of the current marksheet or to another Windows application. For example, you may want to copy a column of grades and paste it into Microsoft® Excel to carry out further analysis of your data or you may want to paste the same grade into a number of cells.

Copying a Single Cell

1. Right-click the cell in the marksheet you wish to copy and select **Copy** from the pop-up menu.

   The contents of this cell are copied to the Windows® clipboard.

2. Select the required Windows application and paste the content of the cell.

Copying an Entire Column

1. Right-click the column header for the column to be copied and select **Copy column contents** from the pop-up menu.

   The contents of this column are copied to the Windows clipboard.

2. Right-click the column header for the column into which to paste these values and select **Paste** from the pop-up menu.

Adding Notes

You can add notes that relate to a candidate's grade, mark, etc. This may be a note stating a reason why a certain forecast grade was given, i.e. due to recent illness it is predicted that this candidate will achieve this grade.

> ***IMPORTANT NOTES:*** *It is not possible to add notes for candidates without grades or marks assigned on the marksheet.*
>
> *You can add notes to read-only columns in forecast, result and coursework marksheets.*

1. Right-click the candidate name, admission number or individual cell containing the grade or mark, etc. and select **Notes** from the pop-up menu to display the **Notes** dialog.
2. Enter the notes as required.
3. Click the **Update** button to save the notes entered and return to the **Marksheet Details** form.

> *NOTE: The notes entered relate to the candidate, not an individual grade or mark. If more than one grade or mark exists for a candidate on a marksheet, please specify the grade or mark to which the note relates.*

Changing the Display Order

The order in which data is displayed in a marksheet can be changed by clicking the appropriate column header.

Example

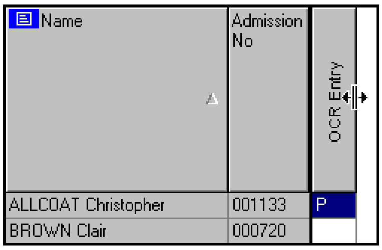
To sort the data in the **Name** column alphabetically, click the **Name** column header. The data is sorted alphabetically. Clicking the **Name** column header again sorts the data in reverse alphabetical order. The same principle also applies to columns whose contents hold numerical values.

An 'up arrow' or a 'down arrow' on the column header indicates the order in which the data is presented.

Changing the Column Width

To view the complete contents of a column, it may be necessary to change the column width.

1. Hover the cursor over the right-hand border of the column for which the width needs to be amended. The shape of the cursor changes accordingly.



2. Click and drag the mouse to expand or shrink the width of the column.
3. Release the mouse button when the optimum column width has been attained.

NOTE: If the width of the column changes so that all columns are no longer visible on screen, use the vertical and horizontal scroll bars to navigate around the screen.

4. Alternatively, double-click the column border to set the minimum width of the column whilst viewing the complete column contents.

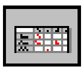
NOTE: Please be aware that the column width on screen relates directly to the column width when the marksheet is printed. When printing, ensure that the columns are of suitable width to avoid printing a large number of unwanted sheets.

Printing and Exporting Marksheets

Once the marksheet has been prepared and the results have been entered, you can print and export the marksheet.

Previewing Marksheets

1. Click the **Marksheet** button or select **Focus | Marksheet – Data Entry** to display the **Marksheet** browser.



Marksheet button

2. Use the viewing tools in the top part of the **Marksheet** browser to filter the list of marksheets as required and click the **Refresh** button to display marksheets that match the search criteria.
3. Highlight the marksheet you wish to print and click the **View/Edit** button to display the **Marksheet Details** form.
4. Click the **Print Record** button to display the **Print Options** dialog.

Select the appropriate radio button to determine the recipients of the printed output and click the **OK** button to display the **Print Preview** window. The marksheet is displayed for previewing.

5. The first page of the report is shown on screen. Scroll up and down the report using the cursor keys or the **Page Up/Page Down** keys.

   To view subsequent pages of the report, either:

   - click the **Focus Browser** button to display the **Display Page** dialog. Enter the page number you wish to view and click the **Display** button.

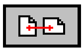
     or

   - click either the **Next Page** or **Previous Page** button to navigate through the report one page at a time.

6. Click the **Close Report Window** button.

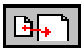
Changing the Orientation of the Report

To change the orientation of the report between portrait and landscape, click the **Report Orientation** button.


Report Orientation button

Zooming In and Out of the Report

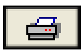
To zoom in on or zoom out from the report for easy viewing, click the **Report Zoom** button.


Report Zoom button

Printing Marksheets

Once produced, the marksheet is displayed and can be printed as follows.

1. Click the **Print Marksheet** button to display the **Print** dialog.


Print Marksheet button

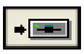
2. Select the appropriate printing parameters and click the **OK** button.

Exporting Marksheet Data

Once produced, the marksheet is displayed. You may wish to export the marksheet data to disk, for use in another Windows application, such as Microsoft Word® or Microsoft® Excel.

Data can be saved as a **Tab Separated File**, with each item of data separated by a tab mark or a **Comma Separated File**, with each item of data separated by a comma. Data can also be saved in **Quick Report** format, so that it can be viewed using Quick Reports or as a plain text file.

1. Click the **Export Data** button to display the **Export File As** dialog.


Export data button

2. Enter the **File name** for the marksheet you are saving.
3. Select **QuickReport**, **Tab Separated**, **Comma Separated** or **Text file** from the **Save as type** drop-down list.

4. Click the **OK** button to export the marksheet to the required destination using the specified file name and to return to the **Marksheet** page.

> *NOTE: If you select a file or enter a file name that already exists, you are be prompted as to whether you wish to overwrite the existing file.*

5. Click the **Close Marksheet Window** button.

Close Marksheet Window button

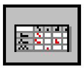
> *NOTE: Marksheet data can also be exported by opening the required marksheet and selecting **Marksheet | Export Marksheet**.*

Deleting Marksheets

Marksheets are a mechanism for entering results. Once the data is saved, the marksheet can be subsequently deleted. Only the marksheet is deleted, the marksheet data is retained. You may also wish to delete any marksheets created in error.

> *NOTE: It is possible to recreate a deleted marksheet if further amendments are required to results, but this should be avoided wherever possible.*

1. Click the **Marksheet** button or select **Focus | Marksheet – Data Entry** to display the **Marksheet** browser.



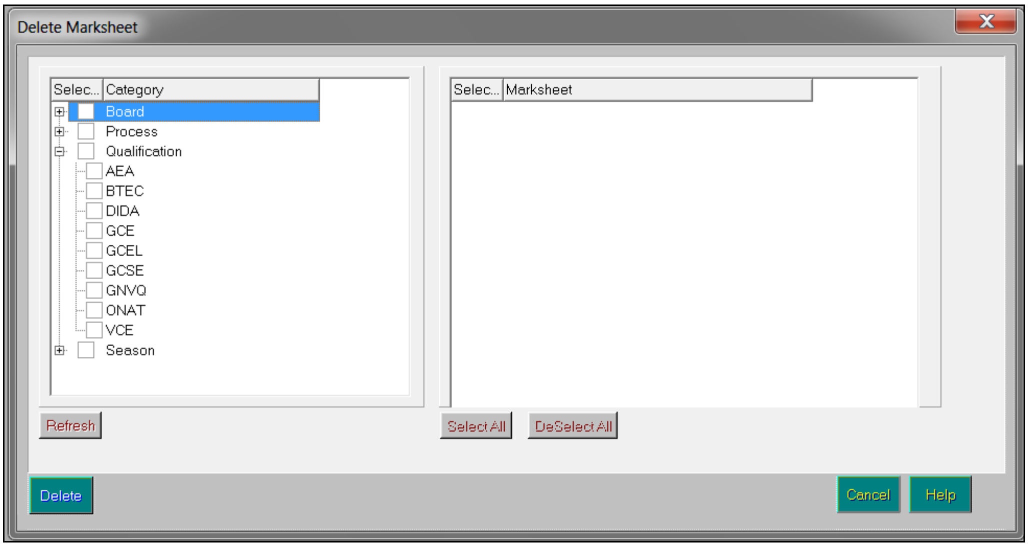
Marksheet button

2. Use the viewing tools in the top part of the **Marksheet** browser to filter the list of marksheets as required and click the **Refresh** button to display marksheets that match the search criteria.
3. Highlight the marksheet you wish to delete and click the **View/Edit** button to display the **Marksheet Details** form.
4. Click the **Delete Record** button.

Deleting Multiple Marksheets

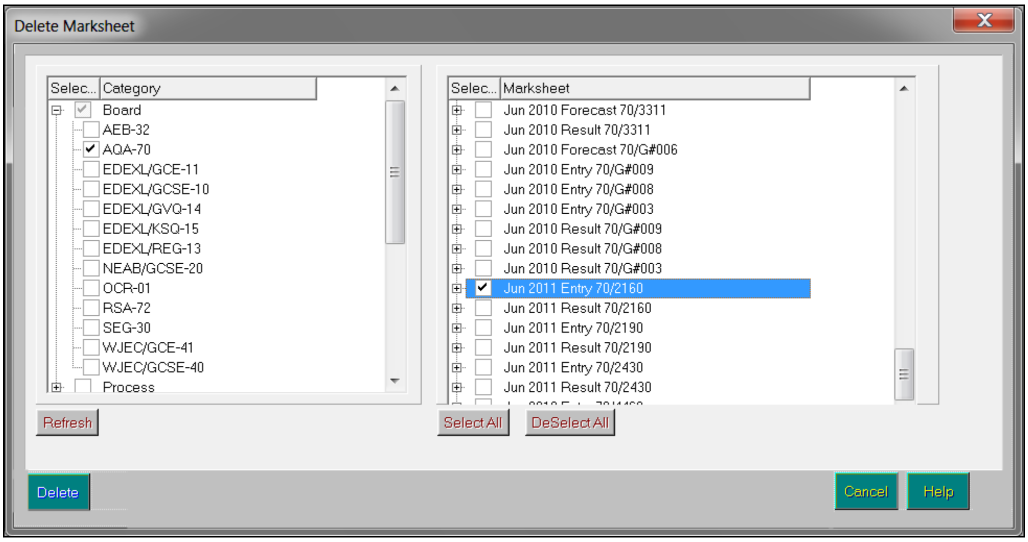
Multiple marksheets and templates can be deleted through a single process. This is a batch process and reduces the need to delete marksheets individually.

1. Select **Tools | Delete Marksheets** to display the **Delete Marksheet** dialog.



2. Select the category or categories with which the required marksheets are associated by expanding or contracting the navigation tree as required and selecting the corresponding check box(es).
3. To display marksheets associated with the selected category or categories, click the **Refresh** button.

   The associated marksheets are displayed in the right-hand panel.

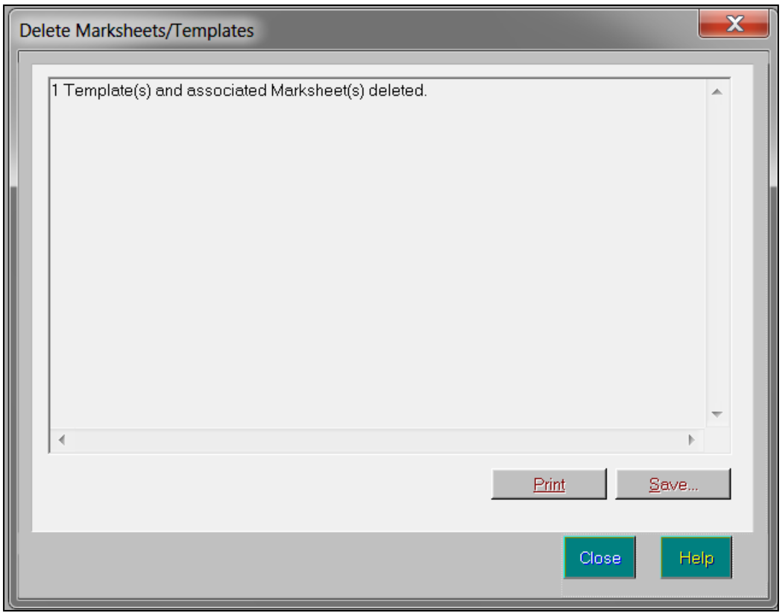


4. Expand the list on the right-hand side and select the check boxes for the marksheets and templates you want to delete.

   The top level item is the template (**Sum 2003 Entry 70/8990** in the previous graphic) and the bottom level item is the marksheet (**Sum 2003 Entry 70/8990 Curriculum Year** in the previous graphic).
5. Click the **Delete** button.

Once the marksheets and templates have been successfully deleted, a confirmation message is displayed.

6. Click the **Close** button.



06| Creating Submission and Amendment Files

Introduction 75
Generating a Submission File.. 75
Selecting a Submission File Type 80
Tidying EDI Folders.. 83

Introduction

Submission files are created by Examinations Organiser for external seasons and provide the examination boards with details regarding candidates sitting specific examinations, their forecast grades, their coursework marks and any amendments to the these details over the course of an Examination season.

There are seven types of submission files that can be created by Examinations Organiser:

Amendments

Amendments are required when changes are made to entries because either the candidate details have changed (change of name, spelling corrections, etc.) or entries are added or withdrawn.

Coursework Marks

This is the grade or mark awarded to candidates for an internally assessed component.

Entries

A notification to the examination board that a candidate is presenting themselves for elements A, B, C as part of series Z.

Forecast Grades

Many examination boards request estimated grades for their examinations.

Joint Council

The submission file formats are fully described in the booklet **Formats for the Exchange of Examination Related Data** (version 10) published by the Joint Council for General Qualifications.

Generating a Submission File

There are four types of submission file that can be generated and sent to the appropriate examination board. These are Entry, Amendment, Forecast Grade and Coursework Mark submission files.

IMPORTANT NOTE: *It is strongly suggested that each coursework submission file only contain one component. If the inspection window is expanded to enable checking of the contents, the window must be closed and the submission file saved before submitting the file.*

The first transaction with an examination board must be an Entry file. This informs the examination board of the candidates scheduled to sit their examinations. Once the Entries file has been submitted to the examination board, Forecast Grade, Coursework Mark and Amendment files can be sent if necessary, to provide further important information for the examination board.

The method of generating a submission file is virtually the same for all types of submission file, i.e. the same form is used to generate each of the submission files but you must select a different **Type** of file to indicate which file is to be generated.

The naming convention for the submission file follows the same pattern, irrespective of the type of submission file, i.e. `SCCCCCBB.Xnn`, where:

S is the submission file type, i.e. E for Entries, A for Amendments, C for Coursework marks or F for Forecast grades.

CCCCC is the 5-digit Centre number.

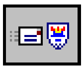
BB is the 2-digit UAB number.

Xnn indicates the Sequence Number

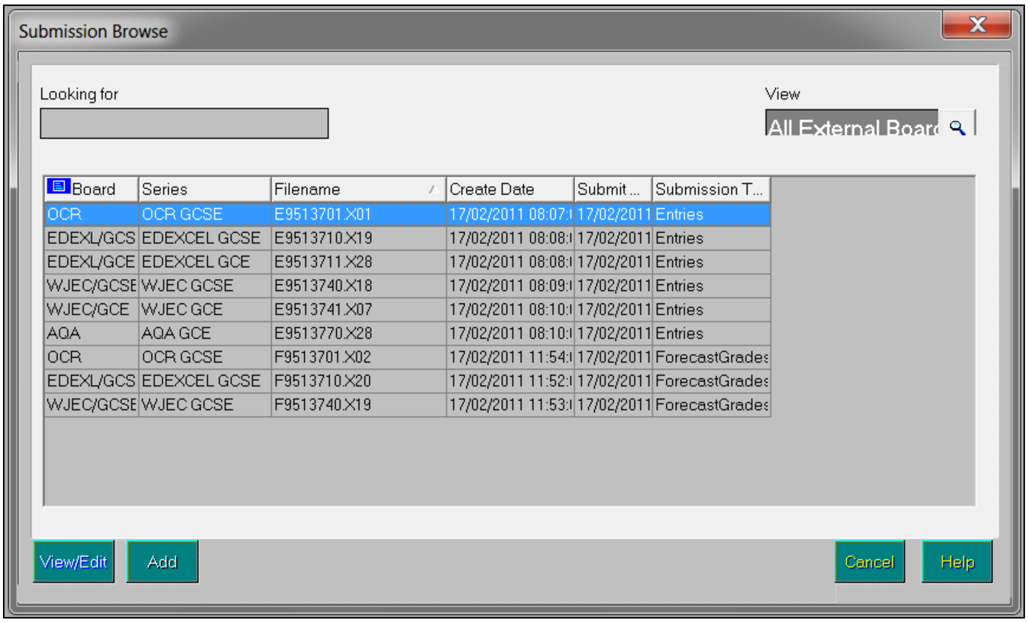
For example, a submission file named `E9513701.X01` would be defined as an **Entries** file for Centre **95137** for board **01** (OCR) and is the first in a sequence of transactions with this examination board in this series.

NOTE: The Sequence Number indicates the order in which files were produced and the order in which they should be processed.

1. Click the **Submissions** button on the Application Bar or select **Focus | Submissions** to display the **Submission** browser.



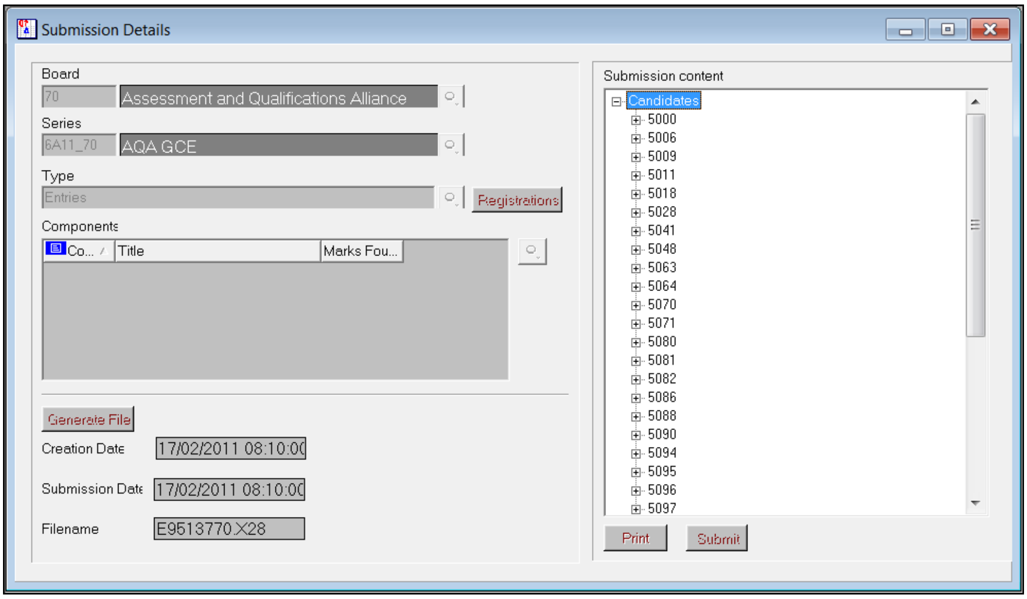
Submissions button



The **Submission** browser displays a list of the files already submitted to the examination boards.

2. To view further details of a submission file already sent to the examination board, highlight the required file and click the **View/Edit** button.

   Alternatively, to create a new submission file, click the **Add** button to display the **Submission Details** form.



3. Click the **Field Browser** button adjacent to the **Board** field and select the examination board for which you want to submit a file from the drop-down list.

> *NOTE: You can only select examination boards whose status is **Active** in the **Exam Board** browser.*

4. Click the **Field Browser** button adjacent to the **Series** field and select the required series for which you want to submit a file from the drop-down list.

   > *NOTE: Only series associated with the currently selected season are available for selection.*

5. Click the **Field Browser** button adjacent to the **Type** field and select the required submission file type from the drop-down list.

   The options include **Amendment**, **Coursework Marks**, **Entries** and **Forecast Grades**.

   The **Components** list box displays the coursework components, if any, that are included in the submission file, together with the number of **Marks Found** for these components.

6. Click the **Field Browser** button adjacent to the **Components** list box to select the components you want to include in the submission file.

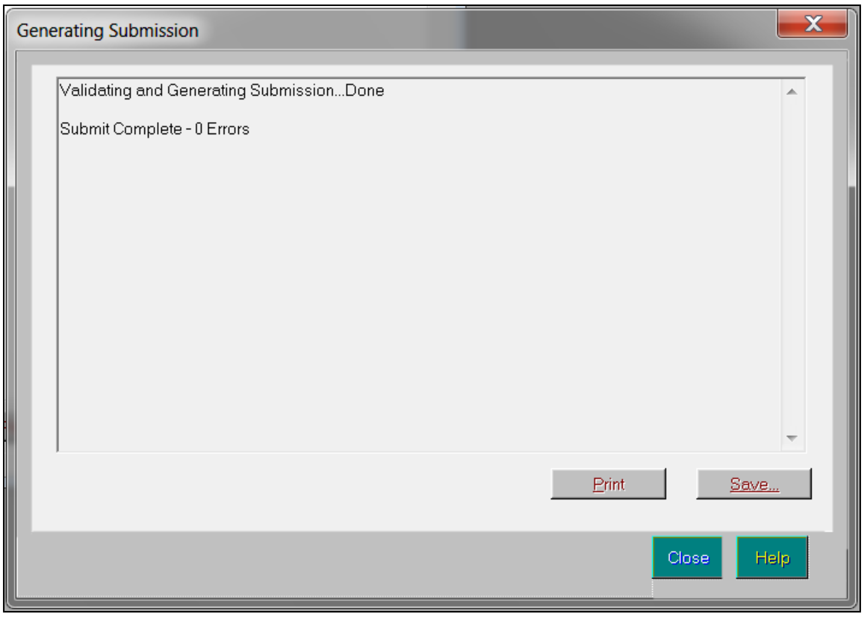
   > *NOTE: If no components are listed or no components are available for selection, please ensure that the appropriate elements that have been imported for the selected series have coursework components.*
   >
   > *If a coursework component has already been submitted, that coursework component is not displayed in the components list during subsequent submissions.*

7. Click the **Generate File** button to create the submission file according to the options selected.

   If this is the first submission file of a specific type for a specific examination board and series combination, the submission file is created automatically. If it is the second submission file of a specific type for a specific examination board and series combination, you are warned that the submission file for this examination board and series is recorded as having been sent.

   > *NOTE: The result set must be locked when generating submission files. This is done automatically as part of the submission process, but you are asked to confirm before continuing. A locked result set ensures that no work can be performed on the affected data whilst the submission file is being created. Click the **Yes** button to lock the result set and generate the submission file.*

8. Whilst the submission file is being generated, the **Generating Submission** dialog displays the progress of the process. When the file has been created, any errors that occurred can be printed or saved by clicking the **Print** or **Save** button.



Alternatively, click the **Close** button to close the **Generating Submission** dialog and return to the **Submission Details** form.

The **Creation Date**, **Submission Date** and the resulting **Filename** is displayed for the associated submission file.

9. The **Submission Content** panel displays a list of candidate details by **Examination Number** and the **Entries** made for these candidates.

   This list can be printed by clicking the **Print** button.

10. If you are satisfied that the file has been generated correctly and want to send this file to the associated examination board, click the **Submit** button. This generates a submission file and copies this file to the `Examout` folder in preparation for EDI transfer.

    At this time, the submission file will also be copied to the `Examhold` folder. This ensures that you retain a copy of any submission file that has been created. This file might also be of use to your local support unit, if you encounter any problems during the submission process.

> ***IMPORTANT NOTES:*** *Where a forecast grade or coursework mark has been entered which is not associated with an entry, a warning is displayed but this does not invalidate the submission.*
>
> *A coursework mark is normally associated with an entry for only one of the elements linked to the component. One such association is sufficient to validate the mark.*

11. Click the **Close Form** button.

> *NOTE: Once the submission file has been generated and the* ***Submission Details*** *form is closed, the result set can be unlocked. If you unlock a result set, all submission files that have been generated but not yet been submitted are deleted. Click the* ***Yes*** *button to unlock the result set and close the form.*

More Information:

Submitting Entries on page *80*
Submitting Forecast Grades on page *81*
Submitting Coursework Marks on page *81*

Selecting a Submission File Type

To ensure the correct type of file is generated and sent to the examination board, it is important to understand the differences between each of the submission file types and when it is necessary to use each of them.

Submitting Entries

Once you have collected, entered and checked all your entries and made provision to charge the appropriate entries, you can submit the entries to the examination boards.

There are various methods of examination entry that the examination boards will accept, although each examination board has specific rules governing the process. Therefore, they may need to be told in advance of the method of entry you plan to use. This usually occurs around the end of November for examinations to be sat in the Summer and around the end of July for examinations to be sat in Autumn.

- Only one entry file can be sent to a board for a single series.
- The entry file format must conform to current requirements.

> *NOTE: The submission file formats are fully described in the booklet* ***Formats for the Exchange of Examination Related Data*** *published by the Joint Council for General Qualifications.*

A number of reports are available within Examinations Organiser that can be run to enable your examination entries to be thoroughly checked. A number of routine checks can also be performed manually to aid with this process:

- Ensure that all examination marksheets have been completed.
- Ensure that any candidate in a class associated with a course has either an entry or an explained non-entry for the appropriate examination.
- Ensure that all entries include a forecast grade, if required.
- Ensure that the complete entry for a candidate has been accepted by the candidate. This involves distributing the Individual Statement of Entry report to each candidate and asking for their signed authorisation.
- Ensure that the proposed entries are acceptable to group tutors. This involves distributing the group Statement of Entry report to the appropriate tutors.

You should submit only <u>one</u> entry to an examination board for <u>each</u> Examination series. This file will usually contain the majority, if not all of the Examination Entries for your Centre.

Unless an examination board specifically requests otherwise, separate files should be submitted for GCE (A-Level) and GCSE examinations.

Once you are satisfied that the Examination entries are correct for the selected series, you can generate the examination entries submission file. The result set will automatically be locked, preventing previously made entries from being changed by another user. The result set remains locked until the submission file has been generated.

When selecting the candidates to be entered for an examination using a marksheet, the following codes can be used:

Y Yes, the candidate will be entered for the examination. This code will be interpreted at query time according to the Centre default entry type specified in the **School Details** dialog.

C The candidate will be treated as a Centre-funded entry, regardless of the default entry type specified in the **School Details** dialog.

P The candidate will be entered for the examination as a Private candidate.

N The candidate will not be entered for the examination (same as blank) or a request for the candidate to be withdrawn from the examination (if an entries file has already been submitted to an examination board).

<Blank> The candidate will not be entered for the examination.

Submitting Forecast Grades

Once the required Examination entries have been accepted, some examination boards may require forecast grades to be sent.

Where forecast grades are required, the information should be recorded in the module via an appropriate marksheet or via the **Entries & Forecasts** page of the **Internal/External Candidate Details** form.

Submitting Coursework Marks

Once the required examination entries have been accepted, the relevant coursework marks should be sent to the examination board.

Where a syllabus includes a coursework component, the information should be recorded in the module via an appropriate marksheet.

A coursework mark for a component should normally be sent only once.

To be included in a coursemark submission file, a mark must:

- be part of a complete set of marks for a component – a component with incomplete marks will not be submitted.
- be supported by a currently valid entry.
- be supported by an appropriate status.
- if indicating coursework carried forward, be supported by an appropriate qualifier flag as part of the candidate record.

The mark element of coursework marks being carried forward must be recorded in the system as **0** but are converted by the submission process to three spaces, as specified in the Formats book.

Submitting Amendments

Only one entries file for a given Examination series should be submitted to each examination board. This file should contain the majority, if not all of your entries.

An amendment file should be submitted in the event of any change to the original entry or to the personal details of a candidate. The file will include complete replacement records for all candidates whose entries and/or personal details have changed since the entries file or last amendment file was submitted. The examination board will then determine the differences between the amended and submitted record and the data held on their database.

Examinations Organiser checks the entries file sent to the examination board and then applies to this image, in order, any subsequently submitted amendments. Once it has established this consolidated image, it compares it with the data currently held in the system. Any alterations found are reported as an amendment. It follows that, if an amendment file is generated for every change that occurs, the process will progressively slow down. It is inadvisable therefore to generate more than one amendment file per day for any series.

A candidate with no subject entries is interpreted as an instruction to withdraw the candidate for all subjects. Individual examination boards may, however follow their own procedures on candidate withdrawal.

IMPORTANT: UAB Web Portals

All the UABs are in the process of developing and rolling out web portals, initially to enable Exams Officers to inspect the current state of entries for their Centre, but also in due course offering the ability to update candidate entries online. Please note that such changes will not automatically be replicated within Examinations Organiser, and there are significant risks in using this facility.

Consider the following scenario:

- To meet an entry deadline, you submit a candidate entry online
- You omit to update Examinations Organiser
- You then withdraw or switch an entry for the same candidate and submit an amendment file.

The effect of the receipt of this amendment by the board is to withdraw the candidate from the online entry.

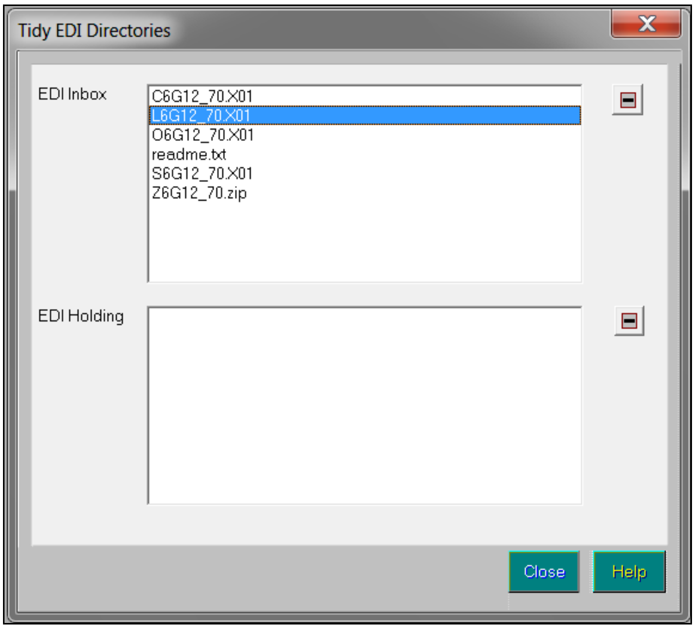
You are strongly advised to use such online update facilities <u>only in emergency</u>, e.g. a system failure coinciding with a deadline. In such cases, ensure that all changes submitted online are replicated within Examinations Organiser. The next time an amendment file is generated, the examination board will receive a second notification of the same data; but this should be non-destructive.

Tidying EDI Folders

Occasionally, you may find that the EDI folders, where transfer files are either stored after being imported or stored before being imported, become unmanageable due to the large amount of obsolete files they hold. For example, you may have files stored in the EDI folders relating to the previous season's examination entries.

It is possible to remove any unwanted or obsolete files through the module. This is the recommended method of removing unwanted EDI files because all record of them is removed from Examinations Organiser. Using Microsoft® Windows® Explorer to remove these files can still leave a trace of them in SIMS. The process enables you to tidy the files, so only those needed by your school will remain.

1. Select **Tools | Tidy EDI Folders** to display the **Tidy EDI Directories** dialog.



This dialog displays the contents of the **EDI Inbox** and the **EDI Holding** folders.

2. Highlight the required file and click the **Delete Item** button.

07| Organising Examination Seating

Booking Rooms for Examinations 85
Adding/Editing a Component Sitting.. 86
Making Special Arrangements for Candidates 90
Activating and De-Activating Seats.. 97
Generating a Seating Plan 98
Dealing with Clashes...101
Removing an Examination Booking from a Room..........................104
Seating Unit Tests..104

Booking Rooms for Examinations

Once examination rooms have been defined, the basedata has been imported into Examinations Organiser and Examination entries have been made, it is necessary to associate a room with the examination component. This is the room in which the examination will be sat.

NOTE: No examination rooms are available when Examinations Organiser is first installed. Examination rooms must be created from existing rooms defined in SIMS.

Candidates for a component may need to be split into separate groups, for instance there may not be a single venue that will accommodate all the candidates, or clash resolution may result in different candidates sitting the component at different times. In such cases, the component may be divided among multiple component sittings, i.e. groups of candidates sitting the same component in the same venue with the same start time.

The process of creating the sitting(s) for a particular component consists of a number of stages. The component must first be selected and then all sittings for this component are displayed. From here, you can create a sitting for the selected component by selecting an examination room and accepting the default date and time. The candidates sitting the examination can then be selected.

On occasions, it may be necessary to make individual adjustments to a seating plan or to the timing of a particular examination. For example, a candidate with a special need may have to be located in a particular room or perhaps by a door. In addition, a candidate may need to have the timing of an examination changed to meet a particular need (although this would require the permission of the examination board).

NOTE: Examinations Organiser provides a period of five minutes between the end of one examination in a room and the start of another examination in the same room, during which an examination cannot be scheduled to start.

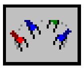
Any examination to be scheduled during this period will automatically be scheduled five minutes after the end of the previous examination. This is designed to give sufficient time to seat candidates, although this interval also applies for candidates who will remain in their seats from one examination to the next.

Additional Resources:

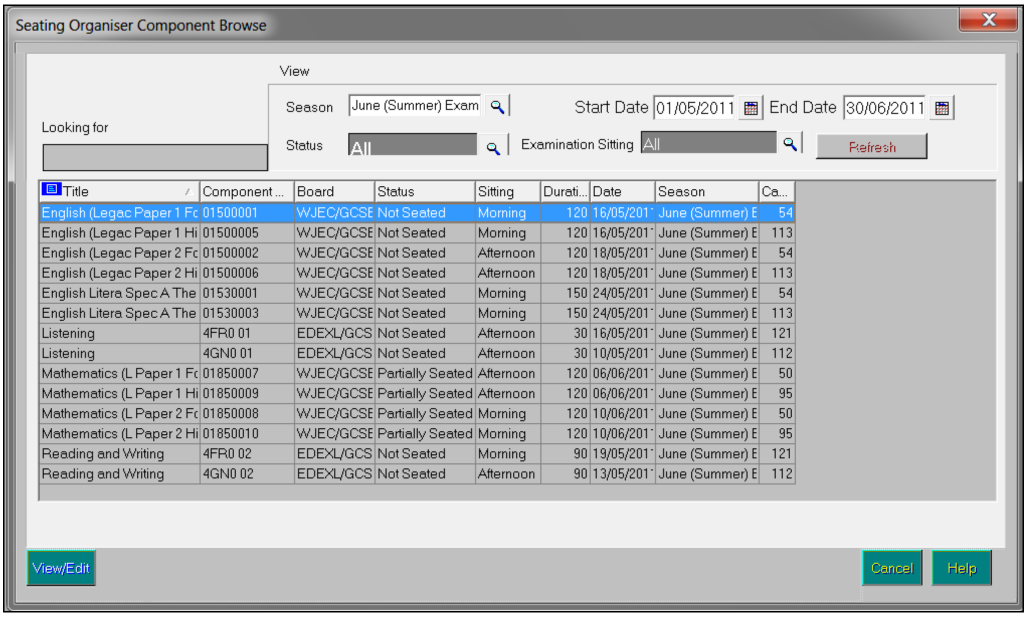
Adding/Editing Examination Rooms in the *Setting up Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook

Adding/Editing a Component Sitting

1. Click the **Seating Organiser** button on the Application Bar or select **Focus | Seating Organiser** to display the **Seating Organiser Component Browse** dialog.



Seating Organiser button

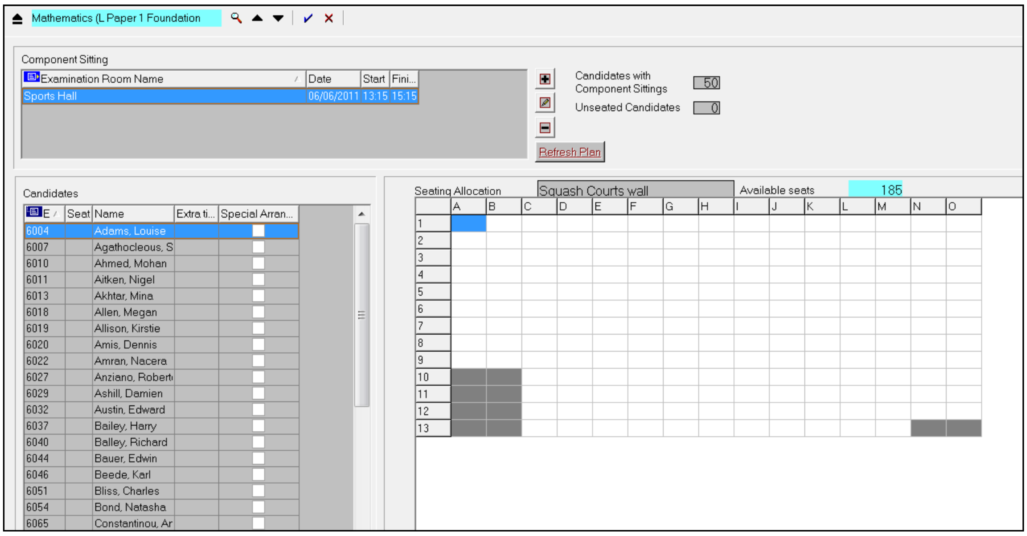


The view can be changed by specifying or selecting the required parameters in the **View** panel. The information displayed in the browser includes the **Status** of each component sitting, i.e. **Complete**, **Partially Seated** or **Not Seated** to give you an indication of seating that still needs to be arranged.

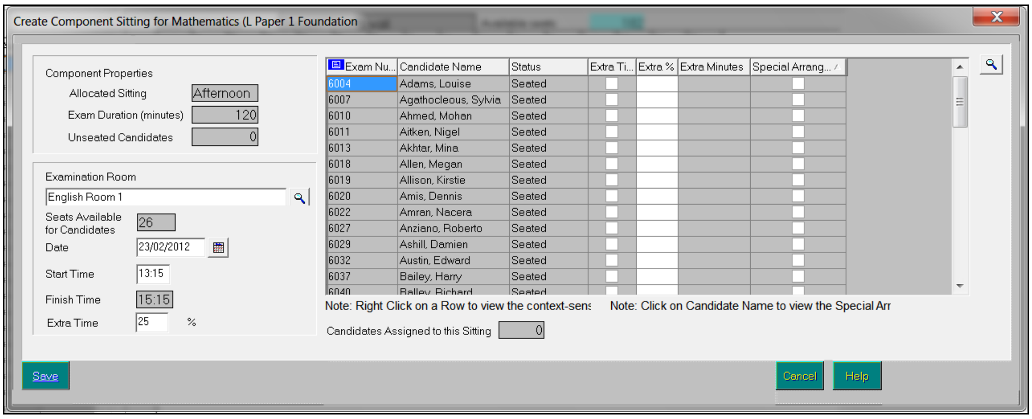
2. Click the **Refresh** button to view all seating plans that match the specified criteria.

3. Highlight the component **Title** for which you wish to arrange the seating and click the **View/Edit** button to display the **Seating Organiser Details** form.

   The **Component Sitting** panel displays information for any seating already arranged for the selected component.



4. Click the adjacent **Add Item** button to display the **Create Component Sitting** dialog. Alternatively, highlight an existing **Component Sitting** and click the **Edit Item** button.



   The **Component Properties** panel displays the **Allocated Sitting** (Morning, Afternoon, Evening, etc.), the **Exam Duration** in minutes and the number of **Unseated Candidates**.

5. Select the examination room in which you wish the examination to take place by clicking the **Examination Room** Field Browser button.

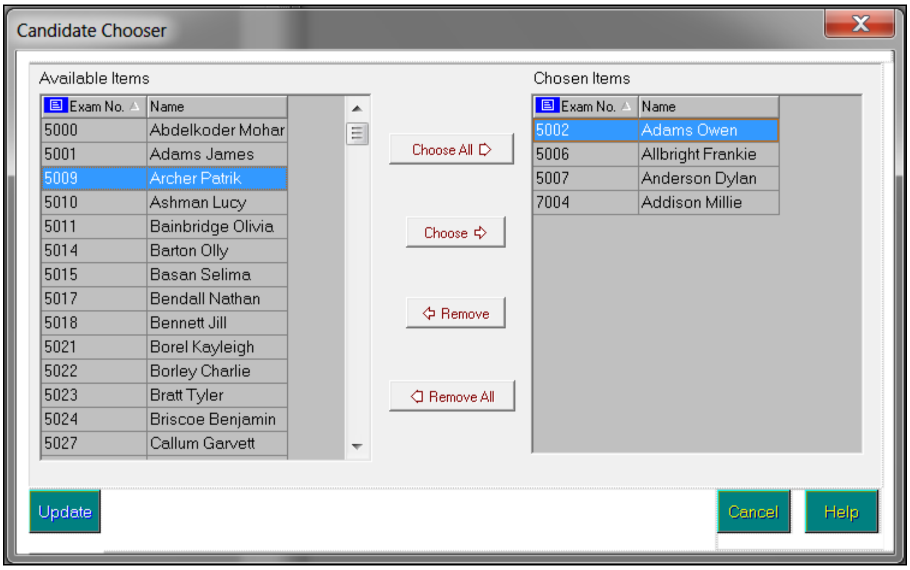
   The number of **Available Seats** is displayed. This is calculated by subtracting the number of seats already allocated for the examination from the total number of available seats.

6. The examinations **Start Time** defaults to the start time specified in the **School Setup** dialog, although this can be edited for individual sittings if required.

The **Finish Time** is automatically calculated from the start time and the duration. This is a read-only field and as such cannot be edited.

Viewing/Selecting the Candidates for the Component Sitting

1. Click the **Field Browser** button on the right-hand side of the **Create Component Sitting for Component** dialog to display the **Candidate Chooser** dialog.



2. Double-click each required candidate so that they are displayed in the **Chosen Items** panel then click the **Update** button to confirm your selections.

   Alternatively, highlight the required candidates and use the appropriate chooser buttons to select or deselect them all as required.

3. Click the **Update** button to confirm your selections and return to the **Create Component Sitting for Component** dialog.

Removing Candidates from a Component Sitting

A candidate can be removed from a component sitting if, for example, they are scheduled to sit two examinations at the same time, and if your establishment is granted permission to do so from the examination board. A candidate can be removed from a component sitting in two ways.

From the **Create Component Sitting for Component** dialog, right-click the candidate you wish to remove and select **Remove from Sitting** from the pop-up menu.

OR

1. Click the **Field Browser** button on the right-hand side of the **Create Component Sitting for Component** dialog to display the **Candidates** chooser.
2. Double-click each candidate in the **Chosen Items panel** then click the **Update** button to confirm your selections.

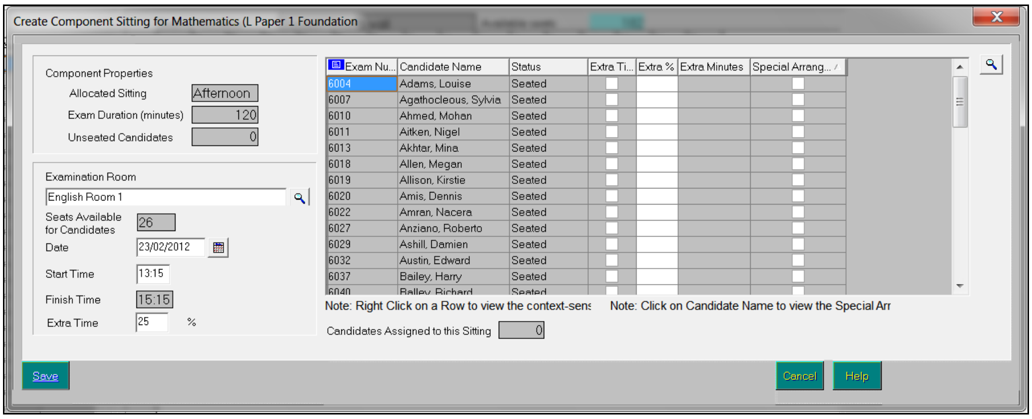
   Alternatively, highlight the candidates to be removed and use the appropriate chooser buttons to deselect them as required.

3. Click the **Update** button to confirm your selections and return to the **Create Component Sitting for Component** dialog.

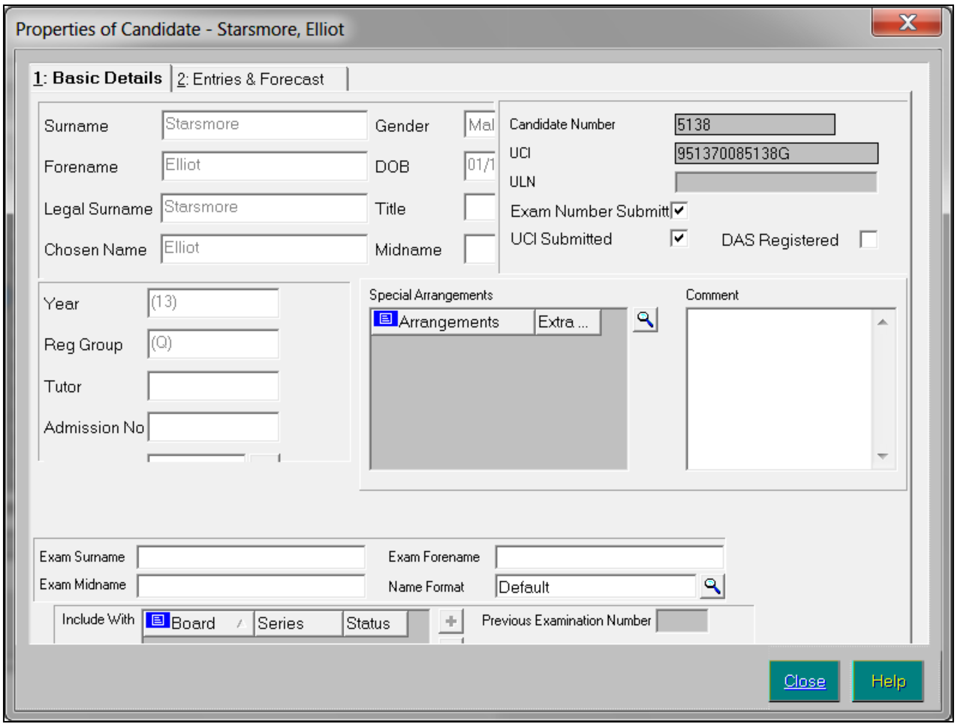
   The candidate is removed from the seating plan and this is reflected in the **Unseated Candidates** field of the **Component Sitting** dialog.

Viewing the Candidates Selected for a Sitting

The candidates who have been selected for this sitting are displayed in the list box on the right-hand side of the screen, together with their **Exam Number** and their **Status**.



To view candidate details and any associated examination entries or forecast grades, right-click the required candidate and select **Properties** from the pop-up menu to display the **Properties of Candidate** form.



Close this dialog and return to the **Create Component Sitting** dialog.

The number of **Candidates Assigned to this Sitting** is displayed and is a total of the number of candidates selected.

1. Click the **Save** button to return to the **Seating Organiser Details** form.

There are various values for the **Status**. These are:

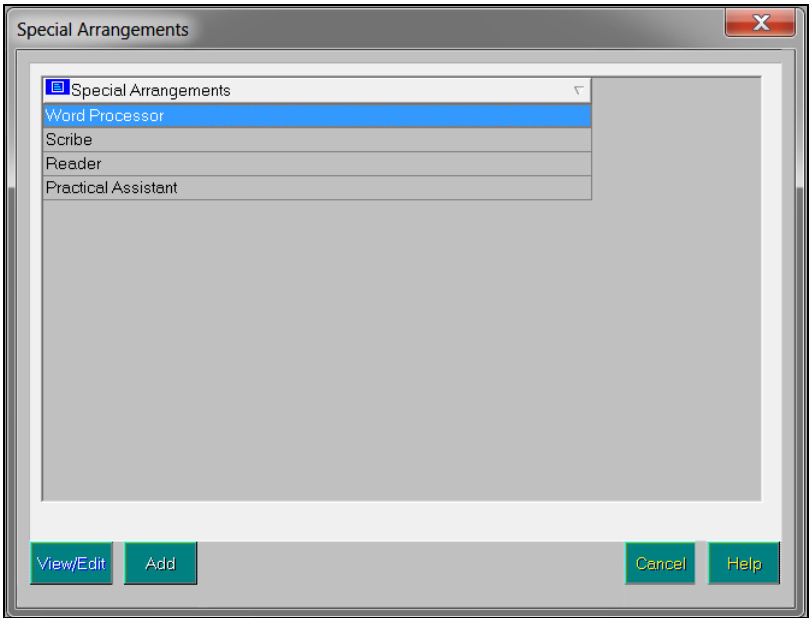
- **No Clash** – this indicates that the system cannot find an entry for another component in the same session.
- **Potential Clash** – this indicates that the candidate has an entry for another component scheduled for the same session, but this is not yet seated and you may proceed with seating them for the currently selected component.
- **Actual Clash** – this indicates that the candidate is already seated for another component at the time selected, and seating will not be permitted for the currently selected component.
- **Seated** - the candidate has already been assigned a seat.

More Information:
Viewing/Editing Internal Candidate Details on page *13*
Viewing/Editing External Candidate Details on page *24*

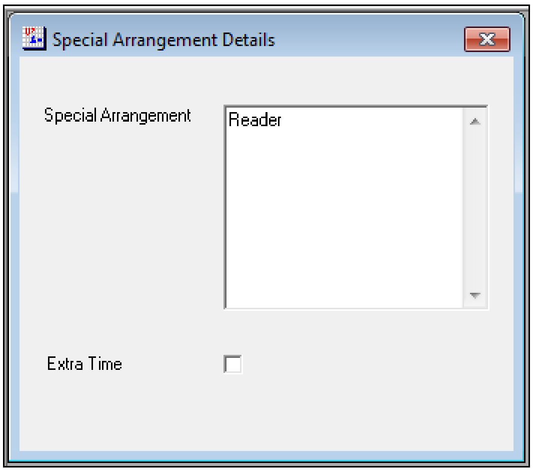
Making Special Arrangements for Candidates

The process for recording Special Arrangements enables you to be specific about the nature of a candidate's particular requirements. It is possible to assign extra time to a candidate's details but you can also record any other additional requirements that they may have, e.g., the presence of a reader or a scribe to assist them with the examination paper, etc. Special Arrangements can be recorded for a candidate without the need to allocate Extra Time.

Select **Tools | School Setup | Special Arrangements** to display the **Special Arrangements** dialog.



A number of pre-defined special arrangement types are provided, these are: Reader, Scribe, Practical Assistant and Word Processor. You can edit the definitions of the pre-defined arrangement types, if required, by highlighting the definition and clicking the **View/Edit** button to display the **Special Arrangement Details** dialog.

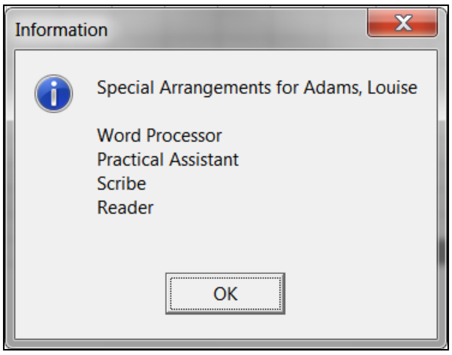


It is possible to create an additional eight special arrangements of your own specification to ensure that you have planned for all possible pupil/student requirements. Any additional special arrangement types that you specify are visible in the following reports: **Examination Register** (if the **Show Special Arrangements** check box is selected), **Individual Candidate Timetable** and the **Candidate Report**.

If the new Special Arrangement that you are adding requires **Extra Time** to be allocated to the candidate, select the check box before clicking the **Save** button.

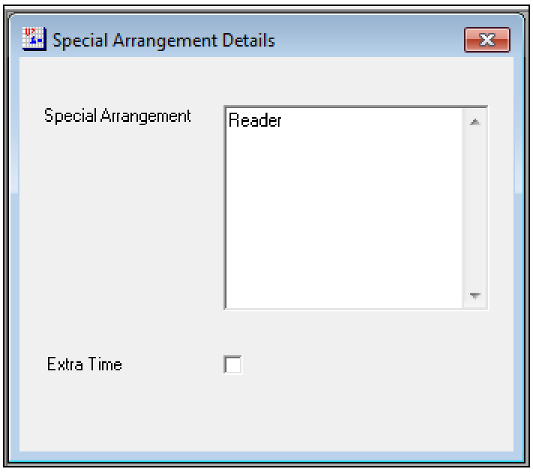
The special arrangements are available for selection on the **Candidate Details** dialog so that you can indicate each individual candidate's requirements.

When you begin the seating process for exams, candidates who have been assigned any special arrangements can be clearly identified by a tick in the **Special Arrangement** column adjacent to their name on the **Create Component Sitting** dialog. If you highlight the name of a candidate with special arrangements, an **Information** dialog is displayed listing the details of the special arrangements that have been assigned to them.



Changing Special Arrangement Details

1. Edit the existing text displayed in the **Special Arrangement** panel or select/deselect the **Extra Time** check box and click the **Save** button.



2. Alternatively, click the **Add** button and create additional special arrangements of your own specification. Any special arrangements that you create yourself are visible for selection on the **Internal/External Candidate Details** dialog.
3. Click the **Save** button.
4. You can also delete any existing special arrangements by clicking the **Delete** button. Any special arrangements that have been assigned to a pupil/student and are subsequently deleted, continue to be relevant for the pupil/student to whom they have been assigned but will not be available for assigning to further candidates. Once an additional special arrangement has been created, it remains available across all the seasons for the candidate(s) to whom it has been assigned.

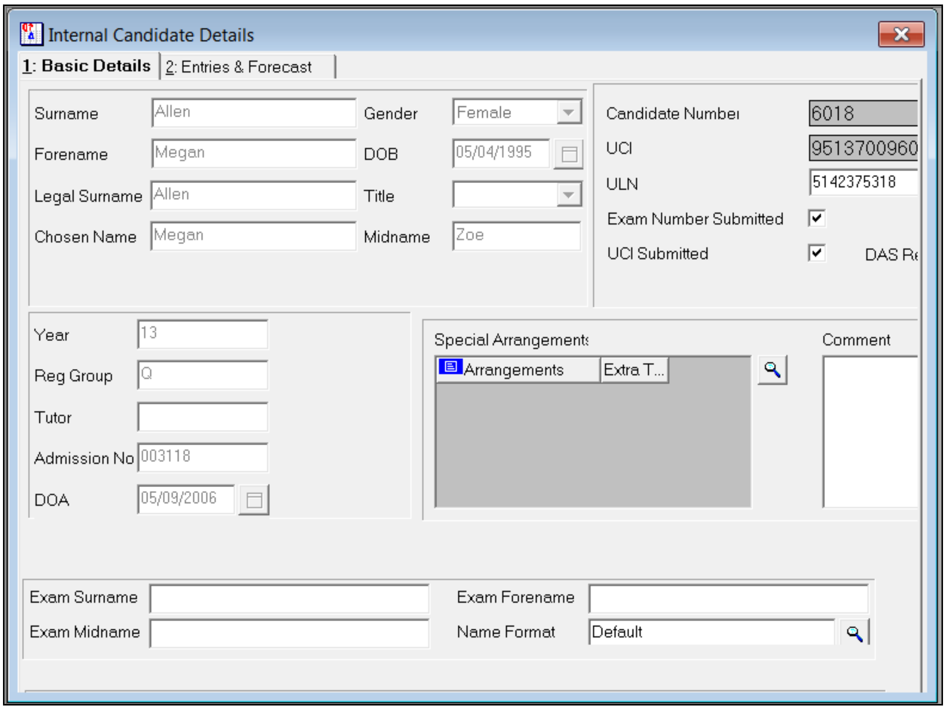
Making a Candidate Eligible for Special Arrangements

Special examination arrangements can be allocated to candidates who are unable to sit examinations under normal examination conditions, perhaps, as a result of a disability or other medical condition. Special arrangements are designed to ensure that fair and just examination conditions are provided for all candidates.

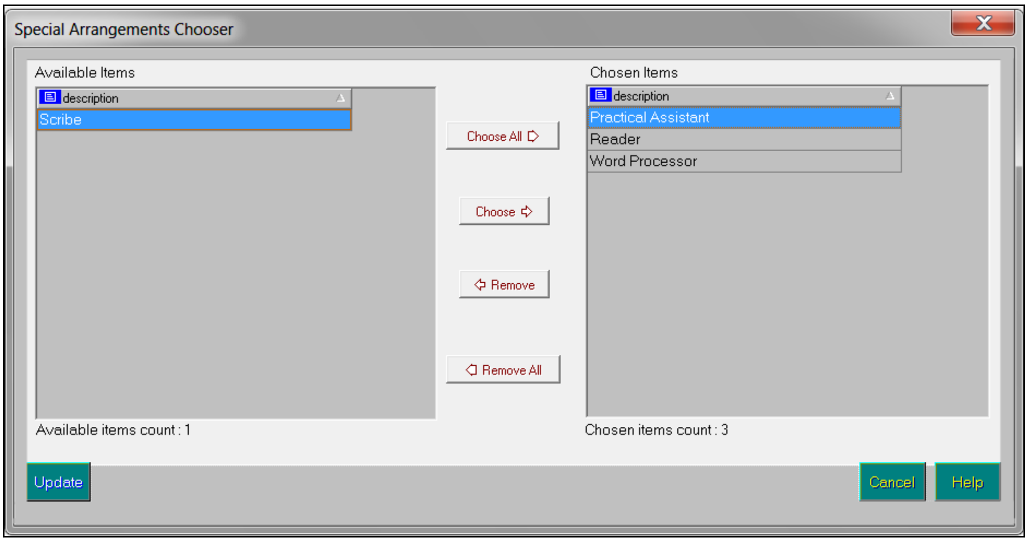
It is possible to grant candidates more time in an examination sitting if they are eligible for **Special Arrangements**. This is carried out on the **Internal Candidate Details** form or the **External Candidate Details** form. Any additional time that is granted to candidates who are eligible for special arrangements is displayed when organising examination seating and when producing reports that relate to examination sittings.

1. Select **Focus | Candidates | Internal** to display the **Internal Candidate Browse** dialog, or select **External** to display the **External Candidate Browse** dialog.

2. Highlight the candidate for whom you want to grant Special Arrangements and click the **View/Edit** button to display the relevant **Candidate Details** form. The **Basic Details** page is selected automatically.



3. Click the browser button adjacent to the **Special Arrangements** panel to display the **Special Arrangements Chooser** dialog.



4. Select the required **Available Item(s)** and click the **Choose** button to move them into the **Chosen Items** panel.
5. When you have selected the necessary special arrangements, click the **Update** button to return to the **Basic Details** page of the relevant **Candidate Details** form.

6. You can add additional instructions in the **Comment** box to ensure that all the candidate's requirements are fully explained and documented.
7. Click the **Save Record Changes** button.
8. Click the **Close Form** button.

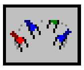
Allocating Additional Time to a Candidate with Special Arrangements

Once a candidate has been made eligible for special arrangements, it is possible to assign to them additional time for an examination sitting. The special arrangement defaults to a 25% increase in **Extra Time** and this is applied to all component sittings. Each component sitting for which you want to assign additional time for a candidate must be visited and amended manually for the extra time to be awarded.

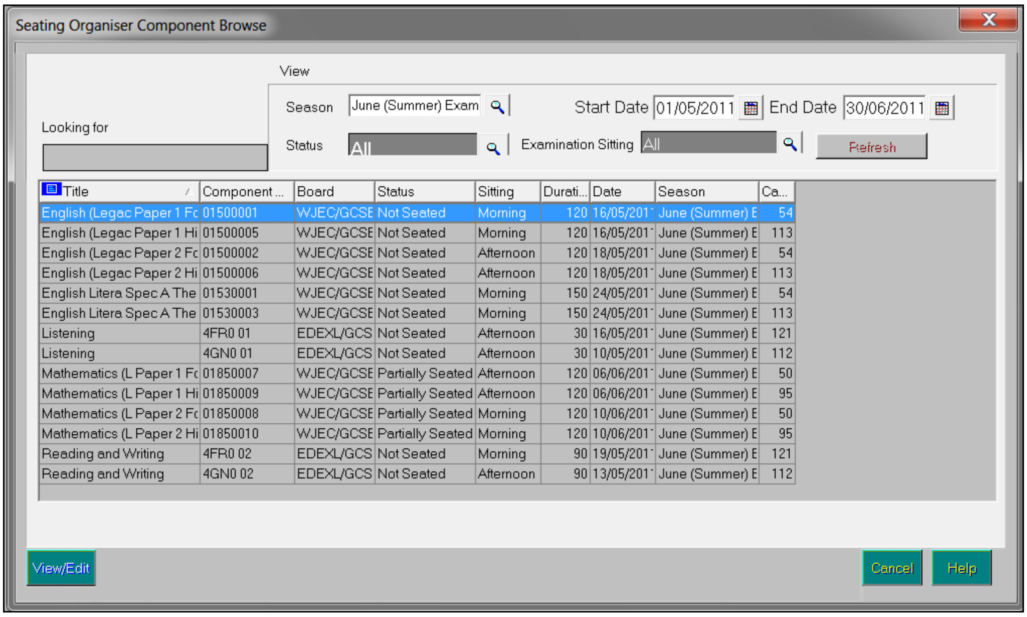
This process can be carried out when a new component sitting is being defined, or at a later date by editing an existing component sitting.

> ***IMPORTANT NOTE:*** *Seats in an examination room are deemed available only if they are available for the duration of the examination of the slowest candidate. For example, if an examination is scheduled to last 60 minutes but one candidate is granted an additional 15 minutes to complete their work, the seats made available for the examination are limited to those that are accessible to the slowest candidate.*

1. Click the **Seating Organiser** button or select **Focus | Seating Organiser** to display the **Seating Organiser Component** browser.

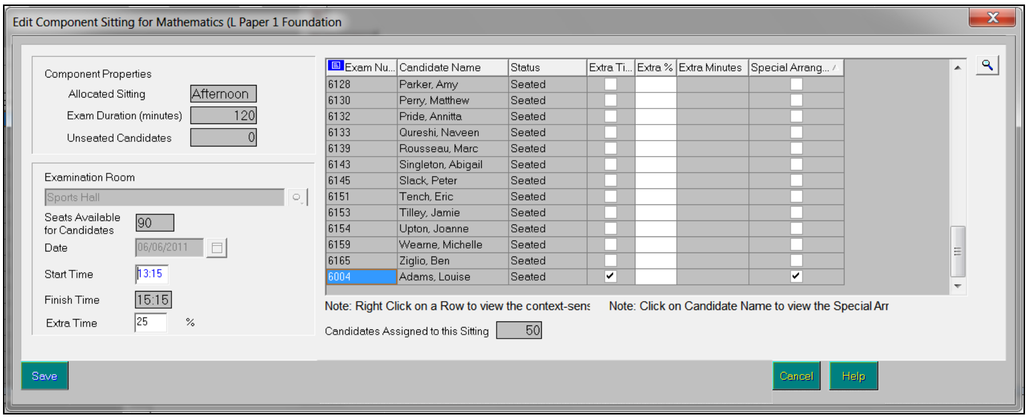

Seating Organiser button

The view can be changed by specifying or selecting the required parameters in the **View** panel. The information displayed in the browser includes the status of each component sitting, i.e. **Complete**, **Partially Seated** or **Not Seated** to give an indication of seating that still needs to be arranged.



2. Click the **Refresh** button to view all seating plans that match the specified criteria.
3. Highlight the component **Title** and click the **View/Edit** button to display the **Seating Organiser Details** form.

   The **Component Sitting** panel displays information for any seating already arranged for the selected component.
4. Highlight an existing **Component Sitting** and click the **Edit Item** button to display the **Edit Component Sitting** dialog. Alternatively, click the **Add Item** button to create a new component sitting.



The **Component Properties** panel displays the **Allocated Sitting** (Morning, Afternoon, Evening, etc.), the **Exam Duration** in minutes and the number of **Unseated Candidates**.

The examination **Start Time** defaults to the start time specified in the **School Setup** dialog, although this can be edited for individual sittings if required.

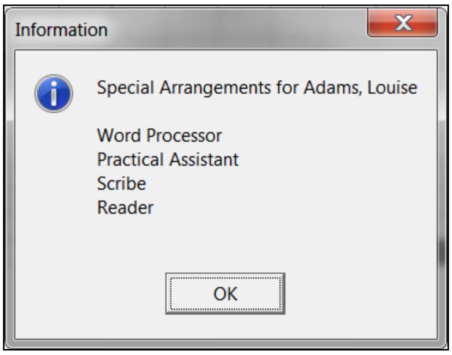
The **Finish Time** is automatically calculated from the start time and the duration. This is a read-only field and cannot be edited.

> *NOTE: The **Finish Time** field displays the standard finish time for the selected component sitting. Any additional time allocated for candidates with special arrangements is not indicated here.*

5. The **Extra Time %** field displays the default amount of additional time that is allowed for candidates who have been granted special arrangements (the default is **25%**). This figure is used for all new component sitting records created, but can be edited if required.

   Candidates who have been selected for this sitting are displayed in the list box on the right-hand side of the screen, together with their **Exam Number**, **Status** and any additional time allocated for special arrangements.
6. Enter the amount of additional time to be granted to the candidate (in per cent format) in the **Extra %** field, if this is different from the default figure of **25%**.
7. Press the **Tab** key to populate the **Extra Minutes** column with the number of additional minutes assigned to the candidate. This column converts the per cent figure entered in the **Extra %** column into a number of minutes.

The **Special Arrangements** column displays a tick against the names of any students who have been allocated special arrangements to enable them to sit the exam. This column is read-only and relates to the value set in the **Internal** or **External Candidate Details** dialog. However, double-clicking in a column next to the name of a student who has been allocated special arrangements, displays the **Information** dialog.



This displays the details of any special arrangements that have already been assigned to the candidate.

8. Click the **OK** button.
9. Click the **Save** button to return to the **Seating Organiser Details** form.

   The **Extra time** column in the candidates list updates to display the number of additional minutes assigned to the candidate for the selected component sitting. This is a read-only field. To edit this value, repeat Steps 4 to 8.
10. Click the **Save Record Changes** button.

More Information:
Making a Candidate Eligible for Special Arrangements on page *92*

Viewing the Additional Time Allocation in Examinations Organiser Reports

A number of reports in Examinations Organiser display the additional time allocated to a candidate with Special Arrangements. These reports are:

- Candidate Special Arrangements report (please see *Candidate Special Arrangements Report* on page *139*) (**Reports | Seating Organiser | Candidate Special Arrangements**).
- Individual candidate Timetables (Default) report (please see *Individual Candidate Timetables (Default) Report* on page *127*) (**Reports | Entries | Candidate Timetables – Default**).
- Individual candidate Timetables report (please see *Individual Candidate Timetables Report* on page *138*) (**Reports | Seating Organiser | Individual Candidate Timetables**).
- Examination Register report (please see *Examination Registers Report* on page *137*) (**Reports | Seating Organiser | Examination Registers**).
- Seating Plans report (please see *Seating Plans Report* on page *135*) (**Reports | Seating Organiser | Seating Plans**).

- Summary Examination Timetable report (please see *Summary Examination Timetable Report* on page *134*) (**Reports | Seating Organiser | Summary Examination Timetable**).
- Exam Room Usage report (please see *Exam Room Usage Report* on page *134*) (**Reports | Seating Organiser | Exam Room Usage**).
- Candidate report (please see *Producing the Candidate Report* on page *132*) (**Reports | Candidate Report**).

Activating and De-Activating Seats

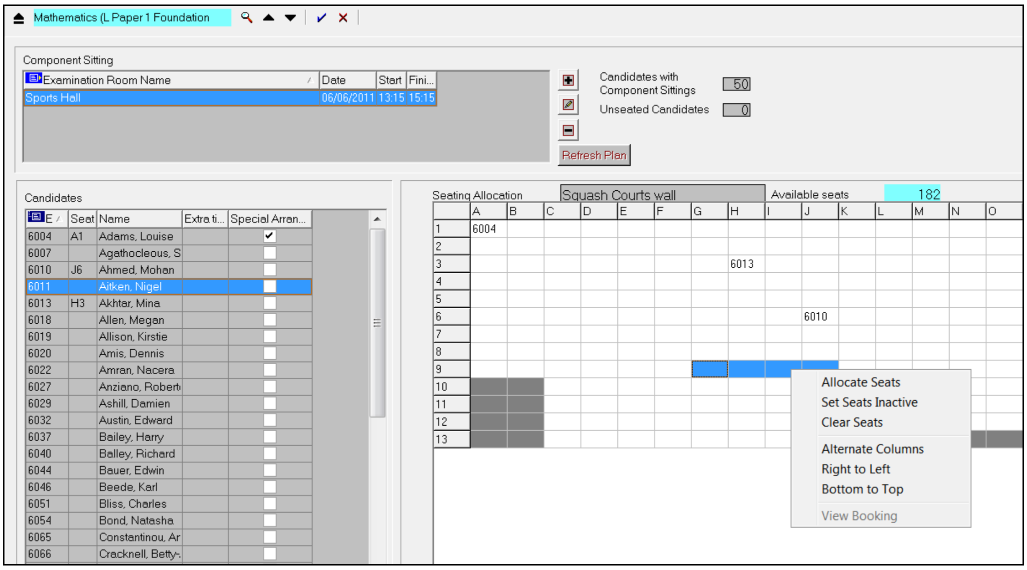
The room layout for this individual examination can be amended to suit your requirements. For example, you may wish to de-activate an extra block of seats to allow room for more invigilators.

NOTE: Changing the room layout within the individual sitting does not affect the default layout for the room and it does not affect other examinations scheduled for this room.

Additional Resources:

Adding/Editing Examination Rooms in the *Setting up Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook

1. Highlight the seat(s) to be de-activated by either clicking an individual seat or dragging across a group of seats.



2. Right-click the selection of seats and select **Set Seats Inactive** from the pop-up menu. These seats are displayed with a yellow background and will not be available when organising the seating. The **Current Seating Capacity** is also updated to reflect the reduced seating capacity.

> *NOTE: When defining the default room layout, any de-activated seats are displayed with a grey background. When de-activating seats for an individual sitting, these seats are displayed with a yellow background.*

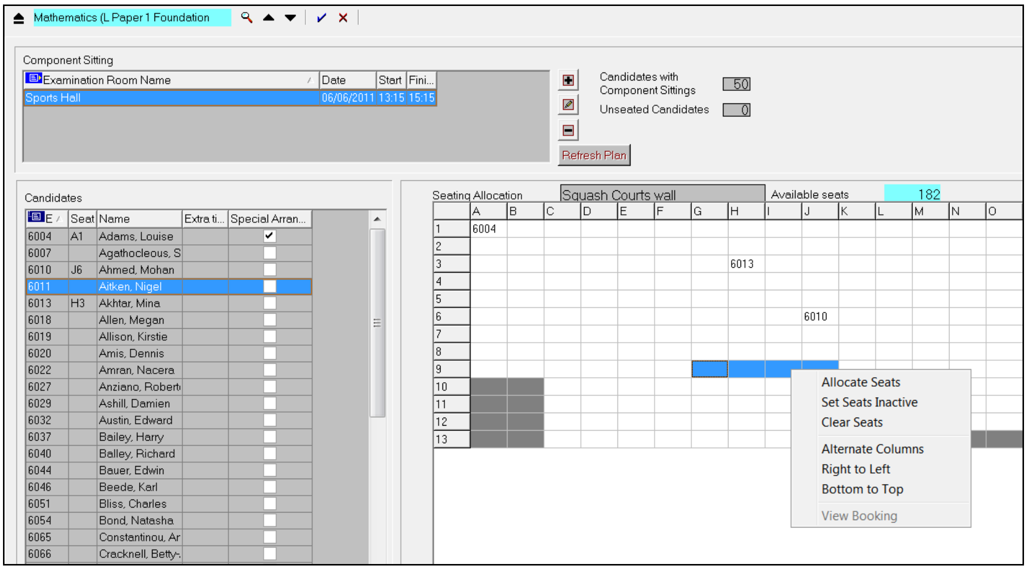
3. To reactivate these seats (if required), highlight the required area, right-click this selection of seats and select **Clear Seats** from the pop-up menu.
4. Click the **Save Record Changes** button.

Generating a Seating Plan

The candidates who have been selected for this sitting are displayed in the **Candidates** list. The seat allocated to them is displayed along with their Exam Number.

The **Seating Allocation** panel displays the layout of the room and the number of **Available seats**.

1. To allocate seating for all candidates in the list for the selected component, highlight an area on the layout. The highlight should encompass roughly the same number of seats as there are candidates.

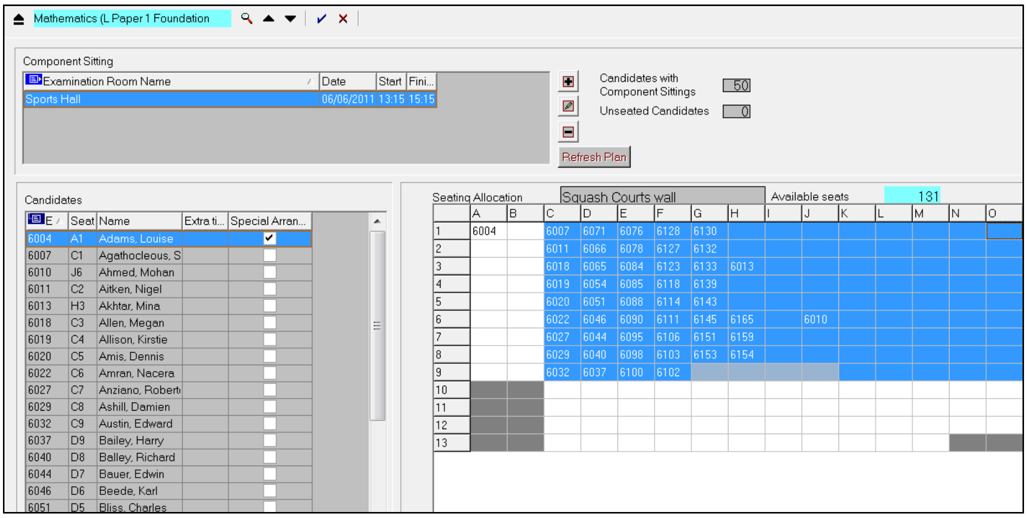


2. Right-click the highlighted area on the room layout diagram and select **Allocate Seats** from the pop-up menu.

> *NOTE: Before allocating seats, you can select the fill direction on the seating plan to indicate the order in which seats will be allocated. To achieve this, right-click the area on the seating plan to be filled and select **Right to Left** or **Bottom to Top** from the pop-up menu. To fill from left to right or top to bottom, deselect either of these options.*

Examinations Organiser fits as many people into the room layout as is possible. This depends on the seating capacity of the room and the number of candidates who need to be seated. Candidates are seated from the top left-hand seat of the highlighted area, unless otherwise specified.

> *NOTE: If you do not highlight at least the correct number of seats, some candidates will remain unseated. If this is the case, repeat this process to complete the component sitting.*



3. To correct an error made when seating candidates, highlight the required area of seating, right-click the selection and select **Clear Seats** from the pop-up menu.
4. Click the **Save Record Changes** button.

Alternating Columns

The way in which seats are allocated can vary depending on your requirements. You may wish to allocate seats in the ways described previously, with candidates assigned to the next available seat.

Alternatively, if you have scheduled two examinations at the same time in the same room, you may wish to arrange the seating in such a way so that candidates taking the same examination are not seated alongside each other. For example, there is one row of candidates taking a French examination, the next row of candidates are those taking a German examination, then another row of candidates taking the French examination and so on. Alternating columns in this way enables you to seat candidates in this way.

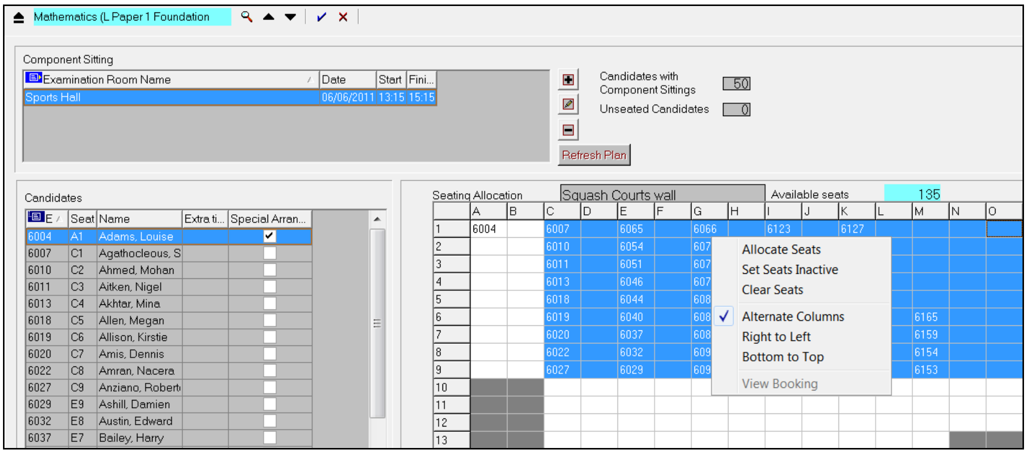
This method can also be used when there is just one examination being sat in a room. Candidates can be sat so that there is an empty row of seats to each side.

> *NOTE: The seating plan <u>must</u> be blank before alternating columns. You cannot alternate columns on a previously prepared seating plan. If a seating plan has already been prepared, you must clear and then re-allocate the seating, once you have selected the **Alternate Columns** option. If you want to seat two examinations in alternating columns, only the first needs the alternate columns option set. Conventional seating for the second will fill in the empty seats.*

1. Highlight an area on the layout. The highlight should encompass roughly the same number of seats as there are candidates.
2. Right-click the highlighted area on the room layout diagram and select **Alternate Columns** from the pop-up menu.
3. With the required area still highlighted, right-click the room layout diagram and select **Allocate Seats** from the pop-up menu.

   Examinations Organiser fits as many people into the room layout as is possible. This depends on the seating capacity of the room and the number of candidates who need to be seated.

   > *NOTE: If you do not highlight at least the correct number of seats, some candidates will remain unseated. If this is the case, repeat this process to complete the component sitting.*



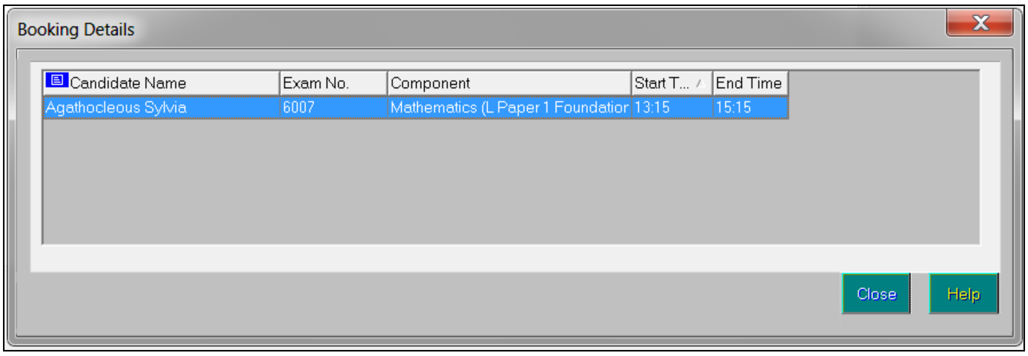
4. To correct an error made when seating candidates, highlight the required area of seating, right-click the selection and select **Clear Seats** from the pop-up menu.
5. Click the **Save Record Changes** button.

Viewing the Booking

This option can be selected if you want to view further details about a particular seat booking in the selected examination. This option can only be performed on one seat allocation at a time, once the seating allocation has been saved.

1. Highlight the required seat.

2. Right-click the seat and select **View Booking** from the pop-up menu to display the **Booking Details** dialog.



Seating Individual Candidates

As well as allocating seating for all candidates in one go, it is possible to allocate seating on an individual basis. This is particularly useful for making ad hoc changes to the current seating plan. For example, a candidate with special seating requirements can be seated automatically, together with the other candidates using the method described previously, but can then be moved to a more suitable position by swapping places with another candidate.

Seating candidates individually in this way enables you to tailor the seating arrangements for an examination session.

Seating an Individual Candidate in a Specific Seat

1. Hover over the individual candidate details in the **Candidates** list.
2. Click and drag the details onto the seating plan.
3. Release the mouse button over the required seat.

Reseating an Individual Candidate in a Specific Seat

To move two candidates so that you can reseat a candidate with special seating requirements:

1. For both candidates, right-click their allocated seat in the seating plan (indicated by their Exam Number) and select **Clear Seats** from the pop-up menu.
2. For the candidate with special seating requirements, hover over the individual candidate details in the **Candidates** list.
3. Click and drag the details onto the seating plan and release the mouse button over the required seat.
4. To seat the candidate who had to be moved to cater for this seating arrangement, repeat steps 2 and 3 and place them in the spare seat.

Dealing with Clashes

There are typically three circumstances in which candidates may find themselves double booked:

- They are genuinely taking two options which have papers scheduled for the same time.

This is a genuine clash. One of the papers may need to be rescheduled to an adjacent session with the appropriate quarantine arrangements in between. If they are both short examinations, they can be sat end-on to each other in the same session.

- The element is designed in such a way that separate components are clustered into a single session.

  The two components should be scheduled end-on to each other with the candidate remaining in the same seat.
- The candidate is entered for more than one Unit of a modular examination, where the Units are deliberately scheduled to be taken one after another in a single session.

Understanding the Clash Status

When viewing a component sitting in the **Create/Edit Component Sitting for Component** dialog, clash details are displayed in a list box on the right-hand side of the screen under the column heading **Status**. The four settings that might be displayed in this column are:

No Clash

This indicates that the component sitting for the associated candidate does not clash with any other sittings to which the candidate has been assigned, nor with the scheduled sitting of any component to which an entry commits him.

Potential Clash

This indicates that the candidate has a commitment to another component, which is not connected via an award linkage to the current component, whose default date and time coincides with the current component. There is no assignment to a component sitting for the other component.

Actual Clash

This indicates that the candidate has been assigned to a sitting of another component that conflicts with the current component sitting.

False Clash

This indicates that the candidate has a commitment to another component, which is connected via an award or element linkage to the current component, whose default date and time coincides with the current component. There is no assignment to a component sitting for the other component.

Viewing Potential Clashes

Clashes occur when a candidate has been scheduled to sit two examinations at the same time. If this is the case, this is identified by the clash **Status** reading **Potential Clash** in the list box on the right-hand side of the **Create Component Sitting for Component** dialog.

1. To view details of any potential clashes for a specific candidate, right-click the required candidate in the list box and select **Clash Properties** from the pop-up menu to display the **Clashes for Candidate** dialog.

The **Availability of Candidates** panel displays details of the component with which the seated examination clashes, including its name, code, room, date and start time.

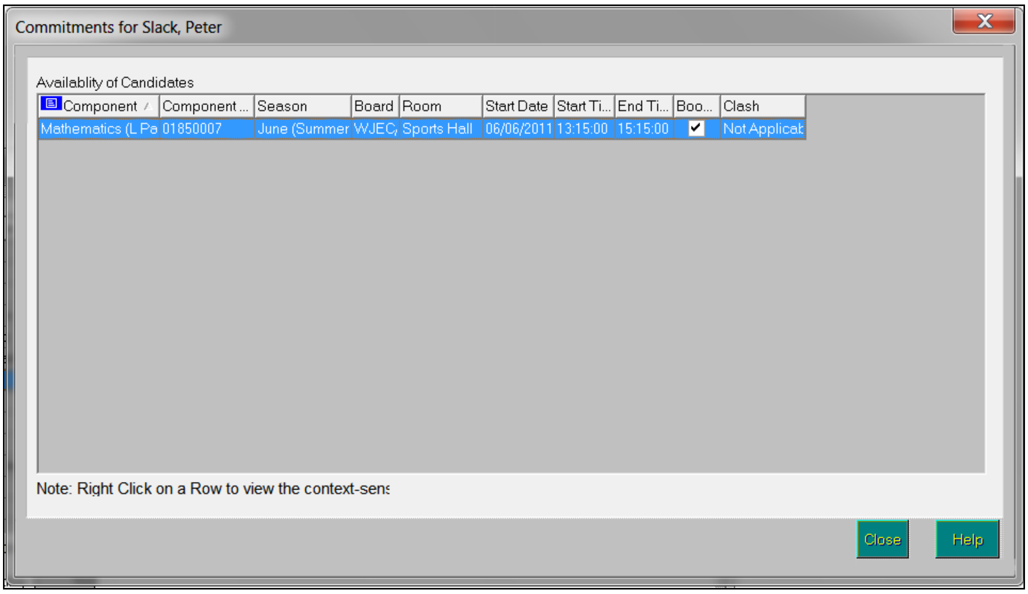
2. If any components are displayed as clashes in this way, you should contact the appropriate examination board to ask for permission to rearrange the sitting of one of the clashing examinations.
3. Once you have contacted the appropriate examination board and have been given permission to change the date and/or time for an examination, you can delete the clash booking by right-clicking the required booking and selecting **Delete Booking** from the pop-up menu.

   The **Seating Organiser Details** form can be used to create a new component sitting to replace the one deleted, editing the date and time as agreed with the examination board and assigning the required candidate(s) to that sitting.
4. Click the **Save** button.

Viewing Existing Commitments for a Candidate

The **Commitments** dialog displays the existing examination commitments for a candidate over a three day period – the day of the selected component sitting, the day prior to the selected sitting and the day after the selected sitting. This facilitates the identification of potential clashes, especially when seating unit exams which are usually scheduled at the same time on the same date.

1. Right-click the required candidate in the list box and select **Commitments** from the pop-up menu to display the **Commitments** dialog.



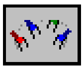
Any existing commitments for the selected candidate are displayed, with the currently selected one being displayed at the top of the list and with a **Clash** status of **Not Applicable**.

2. Click the **Close** button.

Removing an Examination Booking from a Room

If you have incorrectly allocated an examination to a specific examination room, you may want to remove the examination so that it can be allocated elsewhere.

1. Click the **Seating Organiser** button or select **Focus | Seating Organiser** to display the **Seating Organiser Component** browser.

    *Seating Organiser button*

   The view can be changed by specifying or selecting the required parameters in the **View** panel.
2. Highlight the component **Title** to remove the seating and click the **View/Edit** button to display the **Seating Organiser Details** form.
3. Highlight the room in the **Component Sitting** list and click the **Delete Item** button.

Seating Unit Tests

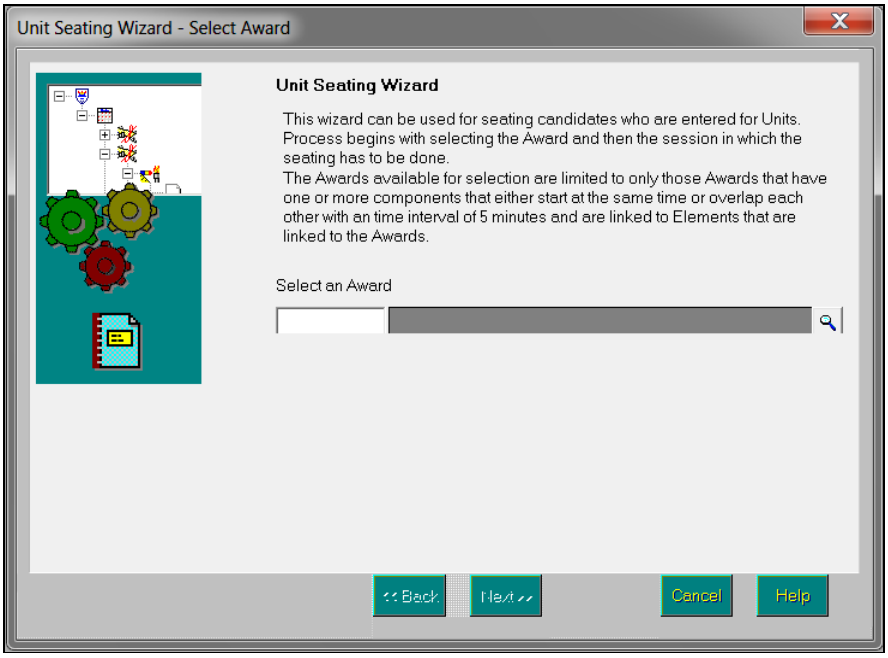
A major issue in the functionality of the Seating Organiser is its use to seat Unit Tests for GCE/VCE qualifications and increasingly for GCSE.

The problem arises because the scheduling pattern adopted by all boards, under the direction of QCA, consists of up to three 1-hour (potentially more and shorter at GCSE) unit tests, all scheduled for the same date and session. A candidate may be committed to taking one, two or three of these in that session.

There are two possible strategies for dealing with this situation:

- Assign each unit test a different start time, typically 9.00am, 10.05am and 11.10am. This allows the Seating Organiser to work relatively normally, except that candidates will have to move seats between each unit, unless you have worked it all out in advance and seated them manually.
- Get all the candidates in at 9.00am, to work through their individual combination of units sequentially.

1. Click the **Unit Seating Wizard** button or select **Focus | Unit Seating Wizard** to display the **Unit Seating** wizard.



The **Select Award** page is displayed.

2. Select the award to be used by clicking the **Field Browser** button and selecting the required award from the list.

   The list displays only the awards with more than one concurrently timetabled component attached.

3. Click the **Next** button to continue.

4. Select the **Date/Session** by clicking the **Field Browser** button and selecting the required date details from the list.

   If more than one session is displayed in the list, select the session in which you want to schedule the units. The associated components are displayed in the **Components** panel, together with the number of candidates with related entries and the duration of each of the components.

   > *NOTE: Only components that have been timetabled, that have an examination date and a start time are available for selection in the **Unit Seating** wizard. If a component is not available for selection but you believe it should be, click the **Manage Basedata** button or select **Focus | Basedata** and check the appropriate component properties.*

5. Enter the **Interval between components** or click the up or down arrow to select the required interval. The value entered must be between **5** (default) and **15** minutes.

   The **Maximum Duration** is updated according to your selections. This value is the sum of the duration of each of the selected components, the intervals between the components, and five minutes at the beginning and end of the complete sitting (to ensure that no other seating is impinged upon).

6. Select the order in which the units are to be seated by clicking the appropriate order buttons adjacent to the **Components** panel. For seating purposes, you might find it more convenient to sit the component with the most candidates first.

   > *NOTE: The convention of re-ordering the list by clicking the required column heading is disabled to avoid confusion.*

7. Select the required **Seating Order** by clicking the **Field Browser** button and selecting from the list. The option selected determines the order in which candidates are seated on the seating plan. Select either **Candidate Number** or **Component and Candidate Number** from the list.

   If you select the **Component and Candidate Number** order, candidates are seated in number order, grouped by their first component.

   The **Mode** field displays the mode in which the wizard is operating. The options are **Fixed** or **Flexible**.

   To operate in **Fixed** mode, each component must be given a distinct and non-overlapping time slot, with at least five minutes between components to allow for the distribution and collection of materials. When working in **Fixed** mode, the **Interval between components** field is disabled, as are the order buttons adjacent to the **Components** panel because the order is fixed by the start times. The **Date/Session** section offers three start times, but for this purpose select the first session available.

   To operate in **Flexible** mode, all of the components must have the same start time. This method enables you to select the interval between components and the order in which the components will be sat.

8. Click the **Next** button to continue.

   The **Session Details** panel at the top of the page is read-only. It confirms the session in which you are working, the selected **Mode**, the **Number of Candidates** to be processed and the **Maximum Duration** required by an individual candidate.

   > *NOTES: Only candidates with an Exam Number can be considered for seat allocation in the **Unit Seating** wizard. Candidates recorded as eligible for special arrangements are excluded.*

9. To display a list of candidates to be seated, together with the associated components and duration, click the **View Item** button to display the **Selected Candidates** dialog.

   The number of candidates displayed in this dialog might be more than the **Number of Candidates** displayed in the **Session Details** panel. This is because any candidate with a genuine clash is included in this list but excluded from the number of candidates, e.g. a candidate has actually been seated for another component which precludes inclusion in the current component.

   > *NOTE: This dialog is blank if all candidates have already been assigned seating.*

10. Click the **Close** button to return to the wizard.

You must now assign the seating for the selected candidates. This involves assigning a seat for each candidate, in the order specified in the **Seating Order** field, and then allocating them to the required components in the prescribed order.

11. Click the **Add Item** button in the **Seat Details** panel to display the **Select Seats** dialog.
12. To select the room for the sitting, click the **Field Browser** button adjacent to the **Select Room** field and select the required room from the list.
13. To allocate seating for the required candidates in the list for the selected component, highlight an area on the layout. The highlight should encompass roughly the same number of seats as there are candidates.
14. Click the **OK** button to return to the wizard.

    The **Seats** section displays the details of the newly selected block of seating and the **Total Seats** displays the number of seats selected in the layout.

    > *NOTE: If you want to use more than one room to seat the required candidates for the sitting, repeat Steps 12 to 15 and select a different examination room.*

15. Select the appropriate check boxes in the **Options** section to indicate the method of filling the seats.

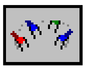
    Select the **Start from Right** check box to start seating candidates from the top right-hand side to the bottom left-hand side of the selected area. Select the **Start from Back** check box to start seating the candidates from the bottom left-hand side to the top right-hand side of the selected area.

    Alternatively, select both check boxes to start seating candidates from the bottom right-hand side to the top left-hand side of the selected area.

16. Click the **Next** button to continue.
17. If you are happy with the way in which candidates are seated for the components, click the **Finish** button to seat the candidates as specified.

    If you want to go back and change any of the options selected, click the **Back** button. Alternatively, click the **Cancel** button to cancel any changes made for the selected award.

18. Once the candidates have been seated, click the **Seating Organiser** button or select **Focus | Seating Organiser**, highlight the required component and click the **View/Edit** button to view your new seating plans.



Seating Organiser button

08| Manually Recording External Exam Results with a QN

Entering and Editing External Examination Results 109
Manually Recording External Exam Results with a QN 110
Differences Between the Edit PI Data and External Results Routines 113

Entering and Editing External Examination Results

Examinations Officers can add external examination results achieved at another centre (usually another school) via **Tools | Examinations | External Results Manual Entry** in SIMS. This enables the maintenance of external exam results achieved by students entering your school in the Sixth Form.

Although this functionality was originally available in Examinations Organiser, it was not previously possible to add the QN associated with the qualification to an external result. This has now been incorporated in SIMS, and enables exam results to be incorporated in a CTF export file.

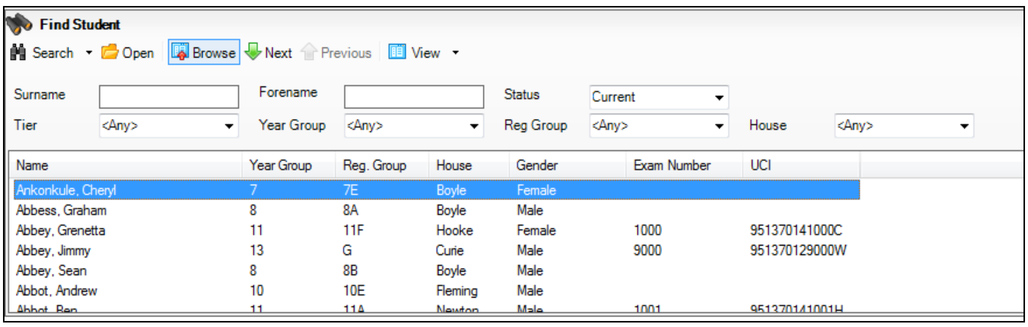
External exam results added via **Tools | Examinations | External Results Manual Entry** in SIMS are not included in the PI calculations. Any results achieved at another centre that are required for inclusion in the PI calculations must be entered in SIMS via **Tools | Examinations | Edit PI Data**.

It is no longer possible to record external results in Examinations Organiser via **Tools | External Results | Manual Entry**.

IMPORTANT NOTES: *When entering examination results manually, it is not necessary to import the associated basedata. Results cannot be entered for external candidates.*

Searching for the Required Students

1. Select **Tools | Examinations | External Results Manual Entry** to display the **Find Student** browser.



2. Enter all or part of the student's **Surname** and/or **Forename**.
3. Select applicable values from the drop-down lists to further restrict the list of students returned.

   By default, students with a status of **Current** will be displayed, but it is possible to select **On Roll**, **Ever On Roll** or **Guest** from the **Status** drop-down list.

   If you prefer to search for **Lists** of students or would like to view those who have a **Photograph** attached to their details, select either of these options from the **View** drop-down list. The default option is to display **Details**.
4. Click the **Search** button to display all students who match the search criteria specified.

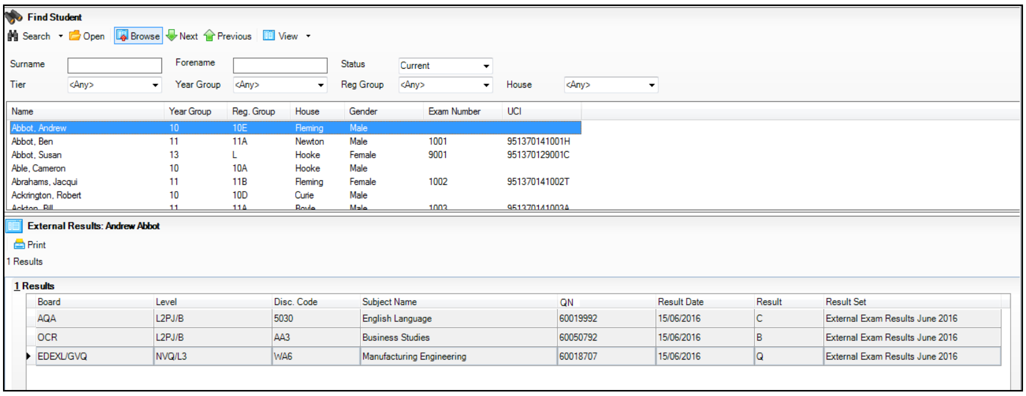
   The **Exam Number** and **UCI** (Unique Candidate Number) are displayed for all students.
5. Highlight the student's name and click the **Open** button to display the **External Results** page.

> ***IMPORTANT NOTE:*** *Before clicking the **Print** button, it is recommended that you change the print settings so that the paper orientation prints to landscape instead of to portrait. This ensures that the external results are output clearly and legibly.*

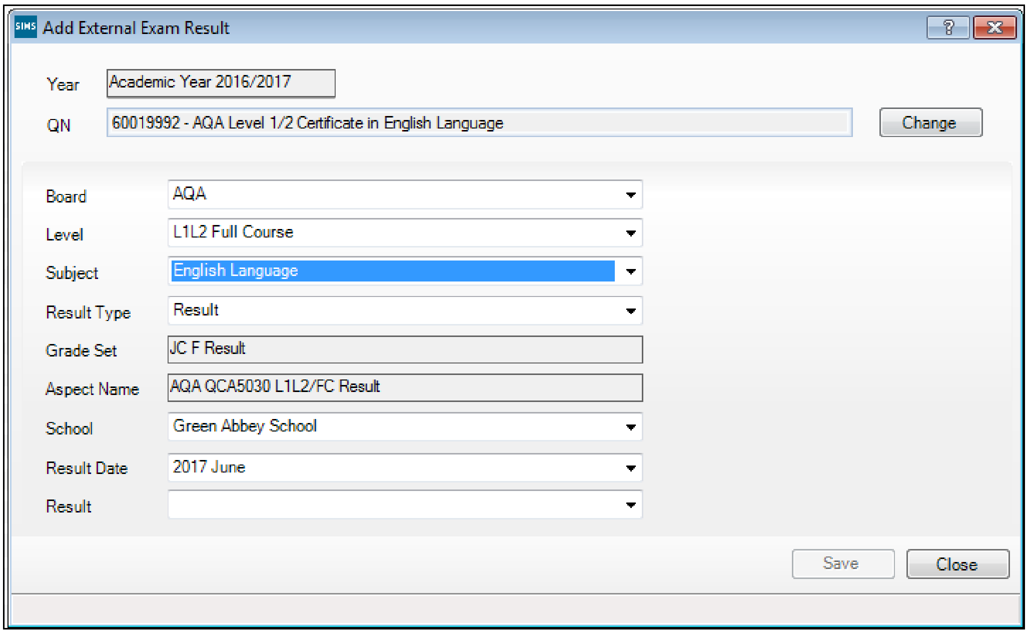
Manually Recording External Exam Results with a QN

Only previously imported EDI results and results entered manually via the External Results routine in Examinations Organiser prior to upgrading to the SIMS 2016 Spring Release will be visible.

1. After searching for the student whose results you want to view, highlight their name and click the **Open** button to display the **External Results** page.



2. Click the **Add Result** button to display the **Add External Exam Result** dialog.



3. Select the academic **Year** from the drop-down list and enter the first few digits of the **QN**.

> *NOTE: The QN code must be entered without slashes. As you enter the QN, the list of possible matches reduces until a single matching examination/course combination remains.*

4. Click the **Apply** button to activate the **Result Date** and **Result** fields at the bottom of the dialog.
5. Select the **Result Date**. However, it is not possible to specify the **Result** until the details of the external exam have been defined.

   Only examination boards that have been set to **Active** in Examinations Organiser are available from the **Board** drop-down list. If the board you require is not visible, you must change its status in Examinations Organiser via **Tools | School Setup | Exam Board**.
6. Select the applicable **Board**, **Level** and **Subject** from the respective drop-down lists.

   The **Result Type** defaults to **Result** but this can be changed to **Endorsement**, if required.

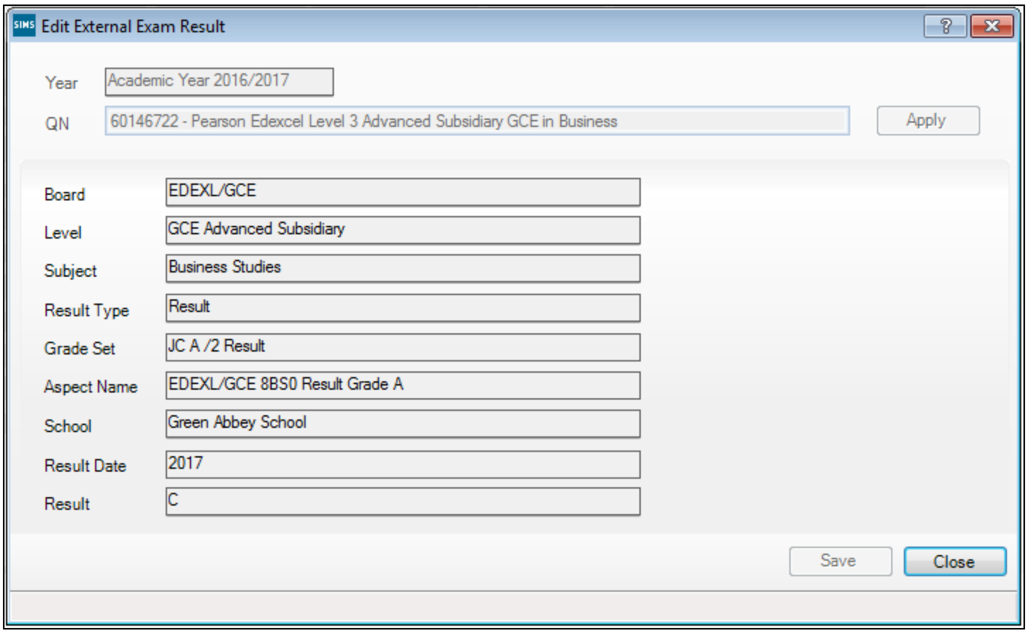
   The **Grade Set** and **Aspect Name** fields are populated automatically from the combination of details entered.

   The most recent school that the pupil/student attended (not including their current school) is displayed by default in the **School** field. Select the school they were attending when the result was achieved, from the drop-down list, if applicable.
7. Select the **Results** achieved from the drop-down list.
8. Click the **Save** button.

External results for individual pupil/students can be viewed via **Focus | Student | Student Details** and by clicking the **Examinations** link in the **Links** panel.

Viewing or Editing an External Exam Result

1. Select the required result and click the **View/Edit** button to display the **Edit External Exam Result** dialog.



It is only possible to select an alternative result from the drop-down list. The remaining fields cannot be amended.

IMPORTANT NOTE: *You cannot change the grade of an imported result from this page. Any changes to grades must be made in an exam results marksheet and then the Edit PI routine in SIMS must be revisited and the totals recalculated.*

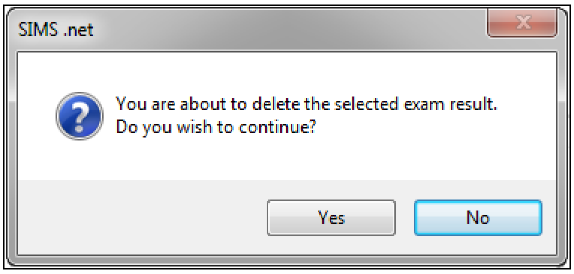
2. Click the **Save** button.

The entry most recently edited or viewed remains highlighted in the **External Results** page until you select another entry. This enables you to identify the last edited entry after the **Edit External Exam Result** dialog is closed.

Deleting an External Exam Result

IMPORTANT NOTE: *It is possible to delete an external result but <u>not</u> an imported result. Any changes to grades must be made in an exam results marksheet and then the Edit PI routine in SIMS must be revisited and the totals recalculated.*

1. Highlight the required result and click the **Delete** button.



2. Click the **Yes** button if you want to continue.

Differences Between the Edit PI Data and External Results Routines

Due to the differing nature of the two processes, there are some apparent inconsistencies between the Edit PI Data routine and the External Results routine in SIMS. This is explained in the following table.

External Results	Edit PI	Comment
Apply button	Refresh button	Apply button needed in External Results to activate fields when no QN.
Only AQA and OCR automatically populate	All AOs automatically populates	External Results are restricted to the Active Board list in Exams Organiser. This is so you are not presented with the full QWS list which includes multiple obsolete boards. It is only possible to match AQA and OCR across the two lists.
Level is not always populated and reduced list		In External Results, the Levels list is based on the 'JCQ' spreadsheet with additional levels added to fulfil user requirements. A match is made when possible. Edit PI allows every available level from the QWS files.
Subject list in alphabetical order	Subject list in 'random' order	Behind the scenes, Edit PI is in code order. The Subject codes are not required for External Results so the list could be re-ordered.
Subject name may show differently for same QN in External Results and Edit PI. (England only)		This is because External Results uses the Subject as present in the QWS file. This is the same behaviour as was present in Examinations Organiser. When adding the same QN in Edit PI, the QWS subject code is mapped to the post Wolfe code (as present in the Performance Measures file) for discounting purposes, and displays a variant on the Subject name. This is a display issue only and does not affect any other processes.

09 | Producing Reports

Introduction 115
Viewing Reports 116
Printing Reports...116
Exporting/Saving Report Data 117
Importing a CSV File into Microsoft Excel 117
Disallowed Combinations Report 121
Producing Entries Reports 121
Producing Candidate Labels..129
Producing the Candidate Report 132
Linear Integrity Check Report..133
Producing Seating Organiser Reports 133

Introduction

A broad range of reports is available and can be accessed through the **Reports** menu. They are divided into the following six categories:

- Entries
- Basedata
- Checks
- Seating Organiser
- Labels
- Results.

Once produced, reports can be printed and saved to disk in one of the following formats:

- CSV (Comma Separated Values)
- TSV (Tab Separated Values)
- QRP (Quick Report Format)
- TXT (Plain Text Format).

Data exported in this way can be used in a variety of other Windows® applications, such as spreadsheets and word processors.

Each of the reports available is prepared according to the same general principles.

1. Select the required report from the **Reports** menu.
2. Specify the required report criteria using the **Report Criteria** dialog.
3. Click the **OK** button to produce the report based on the specified criteria.

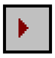
Viewing Reports

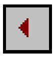
Once the report criteria have been selected, the report is produced and displayed on screen. Scroll up and down the report using the cursor keys or the **Page Up/Page Down** keys.

To view subsequent pages of the report, either:

- click the **Focus Browser** button to display the **Display Page** dialog. Enter the page number you wish to view and click the **Display** button; or
- click either the **Next Page** or **Previous Page** button to navigate through the report one page at a time.

 *Focus Browser button (red handle)*

 *Next Page button*

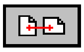
 *Previous Page button*

Click the **Close Report Window** button to exit from the report environment.

 *Close Report Window button*

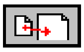
Changing the Orientation of the Report

To change the orientation of the report between portrait and landscape, click the **Report Orientation** button; but note that each report is in a fixed format, and changing the orientation from the default will not generally bring any benefit.

 *Report Orientation button*

Zooming In and Out of the Report

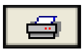
To zoom in on or zoom out from the report for easy viewing, click the **Report Zoom** button.

 *Report Zoom button*

Printing Reports

Once produced, the report is displayed and can be printed as follows.

1. Click the **Print Report** button to display the **Print** dialog.

 *Print Report button*

2. Select the appropriate printing parameters and click the **OK** button.

Exporting/Saving Report Data

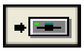
Once produced, the report is displayed. You may wish to export the report data to disk, for use in another Windows application, such as Microsoft® Word or Microsoft® Excel.

Data can be saved as a **Tab Separated File**, with each item of data separated by a tab mark or a **Comma Separated File**, with each item of data separated by a comma. Experience suggests however that because the printed report layout includes a lot of header data, tsv or csv export will rarely produce anything very useful when imported into Microsoft® Excel or other external applications. Accordingly, reports that comprise, after the headings, a simple homogeneous table have been provided with a dedicated Export button, which should be used in preference.

Data can also be saved in **Quick Report** format, so that it can be viewed using an application called Quick Reports or as a **Text File**.

To export from the **Print Preview** screen:

1. Click the **Export Data** button to display the **Export Report** dialog.

   Export Data button

2. Enter the **File name** for the report you are saving.
3. Select the appropriate file format from the **Save as type** drop-down list.
4. Click the **Save** button to export the report to the required destination using the specified file name and to return to the **Report** page.
5. Click the **Close Report Window** button to exit from the report environment.

   Close Report Window button

6. Click the **Export** button on the **Report Criteria** form to run the report.

   When data collection is complete, if there is no data found, you are informed. Otherwise the **Save As** dialog opens.

7. Select the **Path** and enter the **File name** for the report you are saving.
8. Select the appropriate file format from the **Save as type** drop-down list.
9. Click the **Save** button to export the report to the required destination using the specified file name and to return to the **Report Criteria** form.

   You may now modify the previously entered parameters to produce further variations of your report.

Importing a CSV File into Microsoft Excel

If a report is exported from SIMS in `.CSV` format (comma separated values), with a `.CSV` filename extension, the default behaviour of Microsoft Excel when importing such a file is to format all cells as type **General**. This entails examining each value in the file to determine whether its content is purely numeric (i.e. 0-9, comma or point); or is recognisable as a date; or neither of these. On this basis it treats the cell as numeric, date or text respectively. If it is numeric, it strips any leading zeros, and any subsequent re-declaration of the cell or column as type **Text** will not restore the leading zeros.

The effect of this on some types of data can be serious. In the multiple-row results export from Examinations Organiser 6.38 onwards, several columns comprise only numeric characters, but legitimately have leading zeros. These are:

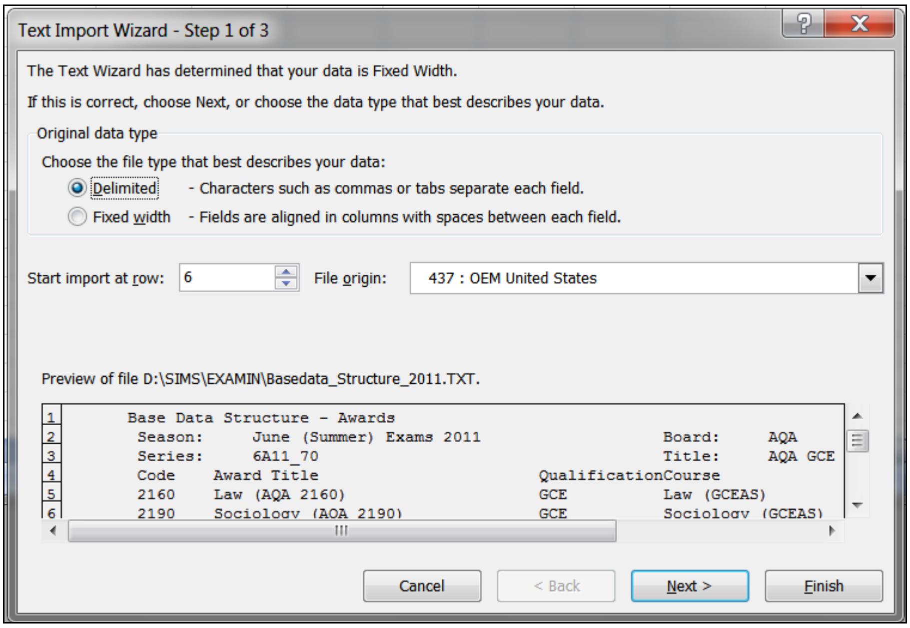
Column	Content
Candidate Number	**0001 – 9999** are valid values. It is a 4-character field, whose content is limited to numerics.
Year group	These are usually numeric, but following integration are preceded by a space if single-figure. Most exports of exam results are for years above **10**, so this will not generally be an issue for most users.
Board Code	**01**, **10**, **11**, etc. OCR's **01** is the only one affected, but it should still be **01**, not **1**.
QCA Subject Code	The traditional academically oriented code set started at **1010**, but codes for vocational subjects are in the range **0001** – **0021**.
Month	Exported as **01**, **02**, etc.
Year	Exported as **03**, **04**, etc.
Result	This will depend on what you have chosen to export. Entry, Forecast and Equivalent are invariably grades; Results will generally be numeric for Units, grades for Certifications. It will generally be best to allow default behaviour to operate here, but note that some grades, particularly at Entry level (**3**, **2**, **1**), look like numerics, and are treated as such unless overridden.

Once the data has been imported into Microsoft Excel, the formatting of the data can be changed as required. However, it is probable that the stripping of leading zeros from at least some of these values will distort the content.

The way to override this behaviour is as follows:

1. When asked to supply a filename for the export in SIMS, enter a suitable name with a `.TXT` file extension.
2. Once the export has completed, open the file using Microsoft Excel.

This displays the **Text Import** wizard, enabling you to specify the display format of the file.

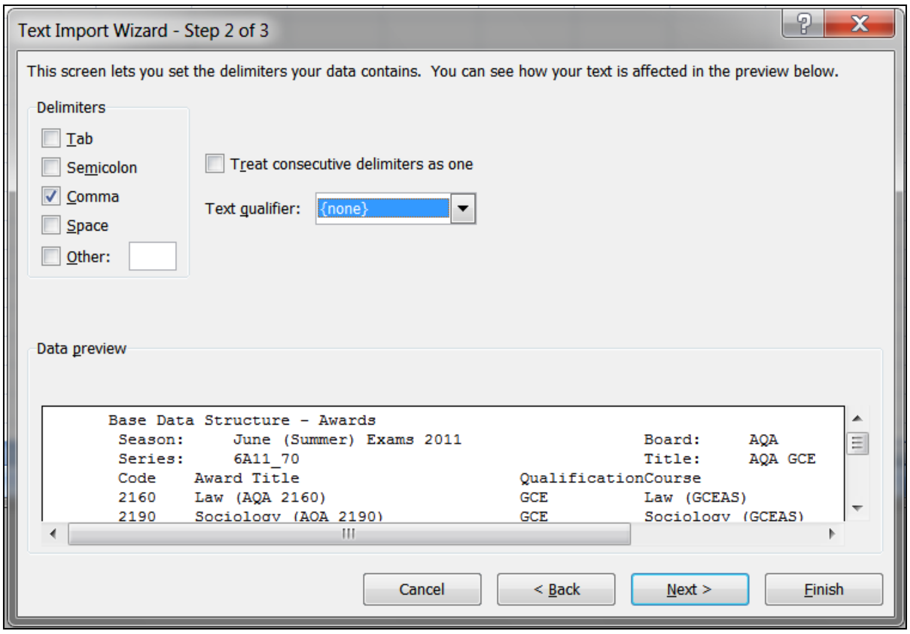


3. Select the **Delimited** radio button. This ensures that the commas present in the exported file act as separators, denoting where one field ends and another field begins.

> *NOTE: If you want to suppress the header rows so that they are not displayed in Microsoft Excel, enter **6** in the **Start import at row** field. This ensures that the first row to be displayed is the column headers and each subsequent row is the associated data.*

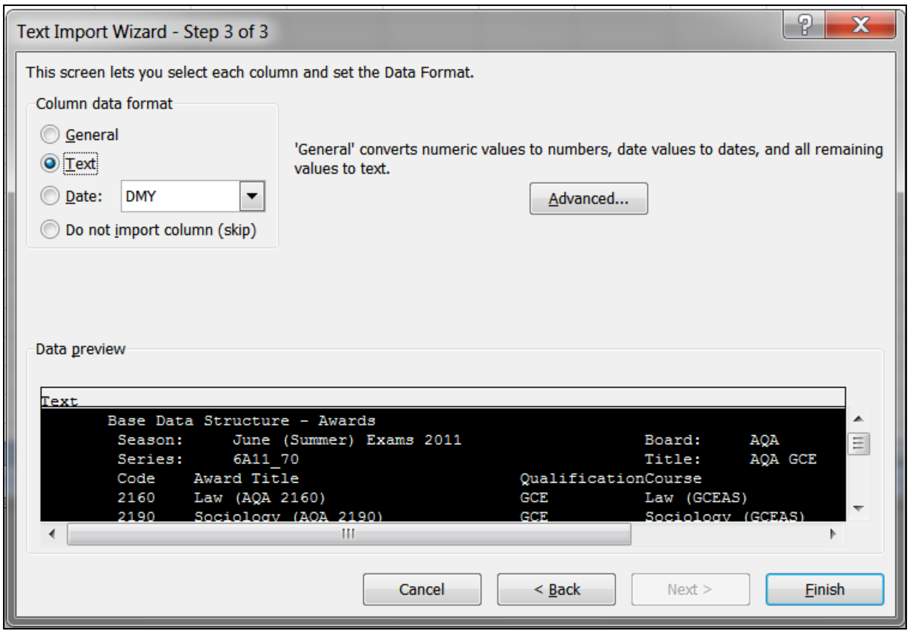
4. Select **437 : OEM United States** from the **File origin** drop-down list.

5. Click the **Next** button to continue.



6. Deselect the **Tab** check box in the **Delimiters** panel and select the **Comma** check box.

   This instructs Microsoft Excel that a comma should be used as a field delimiter.
7. Select **none** from the **Text qualifier** drop-down list.
8. Click the **Next** button to continue.



9. With reference to the table at the beginning of this section, click a column that will be affected by the removal of leading zeros, to highlight it.
10. Select the **Text** radio button in the **Column data format** panel.

> *NOTE: At this stage, the justification in each column is not displayed as it will be once it has been imported.*

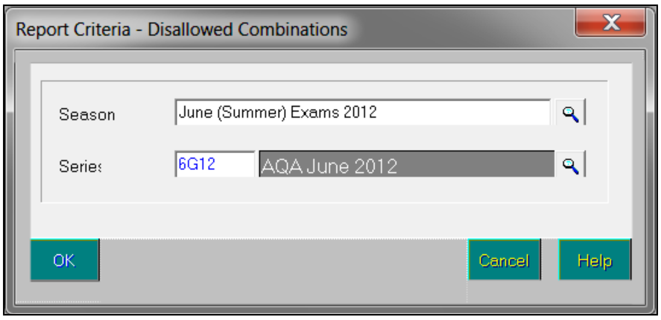
11. Repeat Steps 9 and 10 until you have amended the data format for each of the columns that are affected by the removal of leading zeros.
12. Click the **Finish** button to complete the process and to display the selected file in the format specified.

Disallowed Combinations Report

This report should be produced prior to the creation of a Joint Council Entry, amendment type file submission. It is used to check the entries for a selected series against the contents of the board's Disallowed Combinations file, the relevant parts of which will have been imported as part of the basedata import process.

The report header displays the season, examination board and series. The report body displays the name of the candidate, their Exam Number and a range of codes and titles.

1. Select **Reports | Checks | Disallowed Combinations** to display the **Report Criteria - Disallowed Combinations** dialog.



2. Select the **Season** and the **Series** by clicking the appropriate **Field Browser** button.
3. Click the **OK** button to produce the report.

Producing Entries Reports

Six reports are available in this section. These reports can be run by selecting **Reports | Entries** and selecting the required report.

Statement of Entry Report

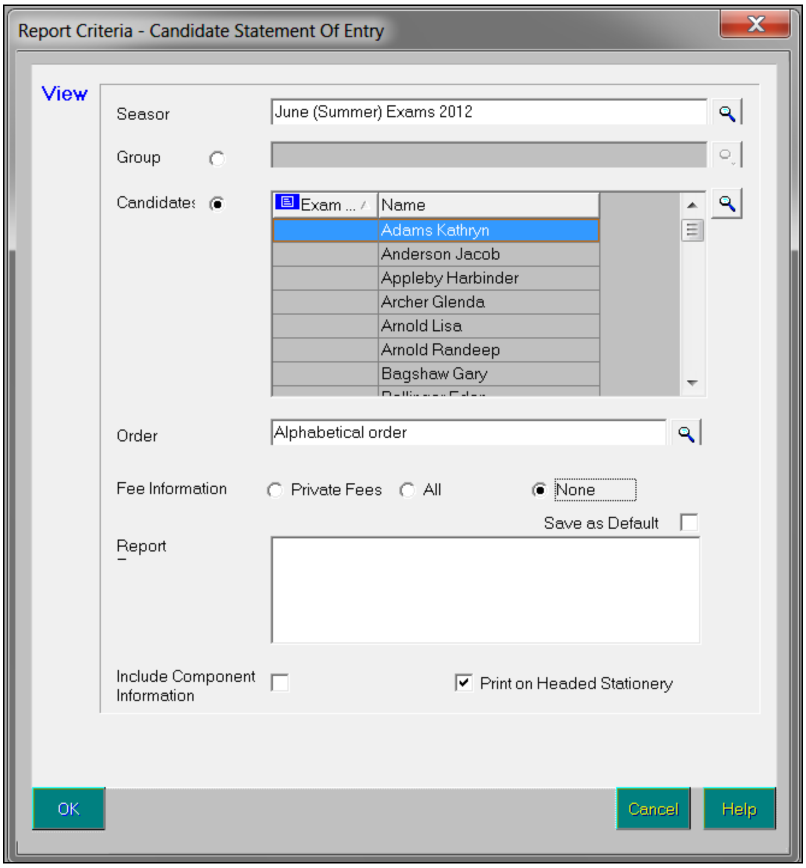
These forms provide information about the examinations options for which a candidate has been entered. They are mainly used for checking that entries have been made correctly. The candidate can be asked to check this and other details before signing. Space is also provided for the signature of the parent/guardian.

This report should be produced after entries have been made, but prior to submission to the exam boards.

For each candidate, the report header includes personal and school details. If a candidate's **Legal Surname** has been specified, this name is displayed in the **Name on Certificates** field on the report. The report body is a columnar list within each award and includes details such as the examination board, element and fees for each entry. Fees will only be displayed if they are non-zero.

If you elected to include component information, the report displays the date, time, duration, etc. for each element.

1. Select **Reports | Entries | Statement of Entry** to display the **Report Criteria – Candidate Statement of Entry** dialog.



2. Select the **Season** and <u>either</u> the **Group** <u>or</u> the **Candidate(s)** by clicking the appropriate **Field Browser** buttons.
3. Select an **Order** for the report and enter a **Report Footer** if required. The footer also contains the following text which is produced by default:

   The Date column against a Continuous Assessment Component should be taken as the date by which marks are due to the Board.

   The report footer can also be used to add a note to candidates asking for any errors in the Statement of Entry report to be reported to the Examinations Officer by a specific date.
4. If you want to save the content of the **Report Footer** so that it can be used when running this report in future, select the **Save as Default** check box.

5. Select the **Include Component Information** check box if you want the code, title, type, date, time and duration of each component included in the report.
6. If you want to print this report on your school's headed stationery, select the **Print on Headed Stationery** check box.

> *NOTE: Before producing this report, if you selected the **Print on Headed Stationery** check box you should also check the settings in the **Headed Stationery Parameters** panel in the **School Details** dialog (**Tools | Setups | School Details**).*

7. Click the **OK** button to produce the report.

> *NOTE: The dates shown on this report are those published by the examination board and may not be final.*

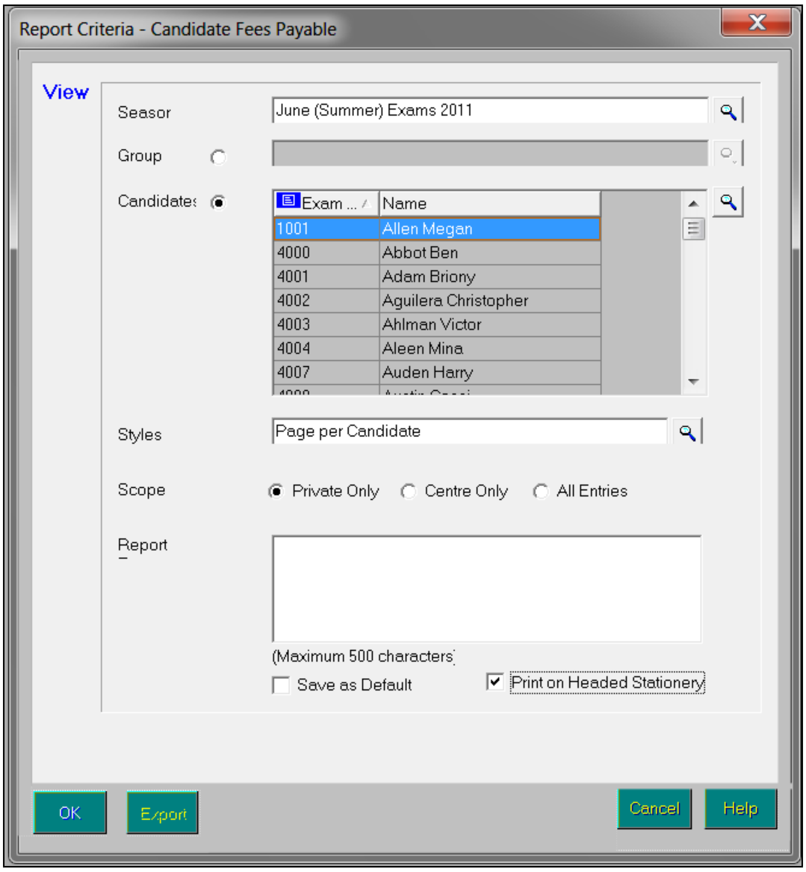
Additional Resources:

Setting the Headed Stationery Parameters in the *Setting up Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook
Important Information on the Usage of the Candidate Name Fields in the *Getting Started with Examinations Organiser* chapter of the *Preparing Examinations Organiser for and Exams Season* handbook

Candidate Fees Payable Report

This report provides schools with the facility to print and distribute to parents and candidates, details of any examination fees due. Once produced, this report can be used as supporting documentation to accompany a formal invoice which can be raised from your school's accounting system.

1. Select **Reports | Entries | Candidate Fees Payable** to display the **Report Criteria – Candidate Fees Payable** dialog.



2. Select the **Season** by clicking the **Field Browser** button and selecting from the drop-down list.
3. Select the method of candidate selection to include in the report by selecting either the **Group** or **Candidates** radio button and clicking the appropriate **Field Browser** button.
4. Select the style of the report by clicking the **Field Browser** button adjacent to the **Styles** field and selecting from the list. The options are **Continuous (Detailed)**, **Continuous (Summary)** and **Page per Candidate**.

   The Page per Candidate report displays a detailed view of fees owed by each candidate in the report scope and it can be used as part of a report sent to parents or to candidates. The Continuous (Summary) report displays the total of all fees owed by each candidate, together with a grand total for all candidates at the end of the report. The Continuous (Detailed) report displays the same information presented in the page per candidate report, but allows for more than one candidate to be displayed on each page.
5. Select the **Scope** of the report (the type of fees on which you want to report) by selecting the **Private Only**, **Centre Only** or **All Entries** radio button.
6. Enter a **Report Footer**, if required. The report footer can contain up to 500 alpha-numeric characters.

7. If you want to save the content of the **Report Footer** so that it can be used when running this report in future, select the **Save as Default** check box.
8. If you select the **Save as Default** check box, any text entered in the footer is displayed again the next time the report is run.

   > *NOTE: If you select the* ***Save as Default*** *check box, any text entered is displayed in the footer even if you select the summary or continuous style of report. If you do not want to use this text when running the report, delete the contents of the* ***Report Footer*** *field.*

9. If you want to print this report on your school's headed stationery, select the **Print on Headed Stationery** check box.

   > *NOTE: Before producing this report, if you selected the* ***Print on Headed Stationery*** *check box, you should also check the settings in the* ***Headed Stationery Parameters*** *panel in the* ***School Details*** *dialog (****Tools | Setups | School Details****).*

10. Click the **OK** button to produce the report or click the **Export** button to export the report.

    If you select to export the report, the **Save As** dialog is displayed. Enter or select the filename and location to which the export file will be saved. Select the required file type, either `.TXT` or `.CSV`, by selecting from the **Save as type** drop-down list and then click the **Save** button.

    > *NOTE: It is possible to export the report only if you select the* ***Continuous (Summary)*** *or* ***Continuous (Detailed)*** *style of report.*

Additional Resources:

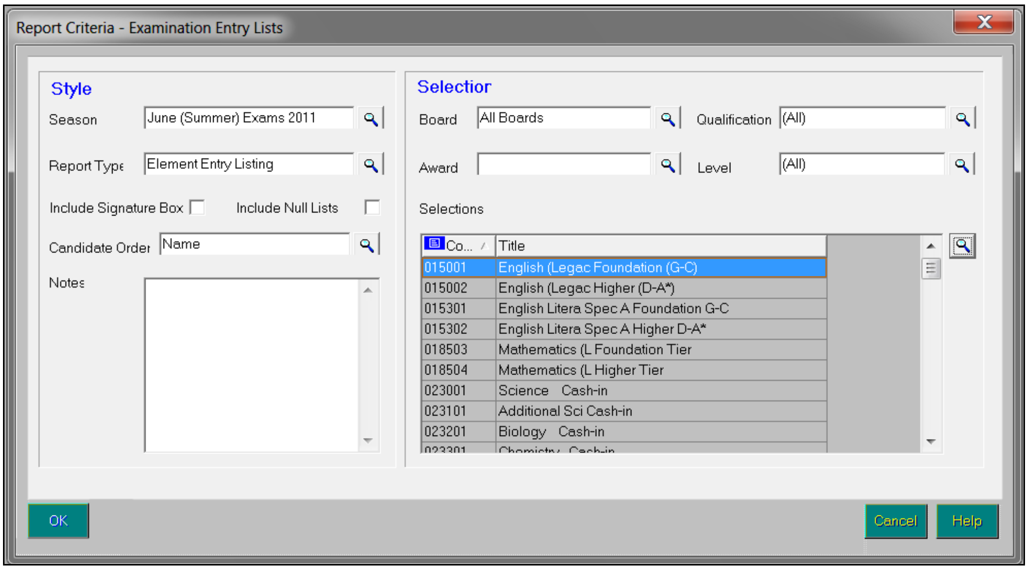
Setting the Headed Stationery Parameters in the *Setting up Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook

Examination Entry Lists Report

This report is used to circulate a list of entries currently stored in the module to Heads of Departments, Course Managers and Class Teachers, for them to check whether the information is correct and complete.

For each of the components selected, the report header includes season, board, award and component details, etc. For each of the components selected, the report body consists of the name of the candidate entered, their Year, Reg Group, Examination and UCI Numbers and the Entry Mode.

1. Select **Reports | Entries | Examination Entry Lists** to display the **Report Criteria – Examination Entry Lists** dialog.



2. Select the **Season** and the **Report Type** by clicking the appropriate **Field Browser** buttons.
3. Select the **Include Signature Box** check box if you want the entry sheet to be signed by the report reader. Select the **Include Null Lists** check box if you want elements or components with no entrants to be represented in the report.
4. Select an **Order** for the report, and enter any **Notes** to be displayed at the end of each element list.
5. Select the **Board**, **Qualification**, **Award** and **Level** by clicking the appropriate **Field Browser** buttons.

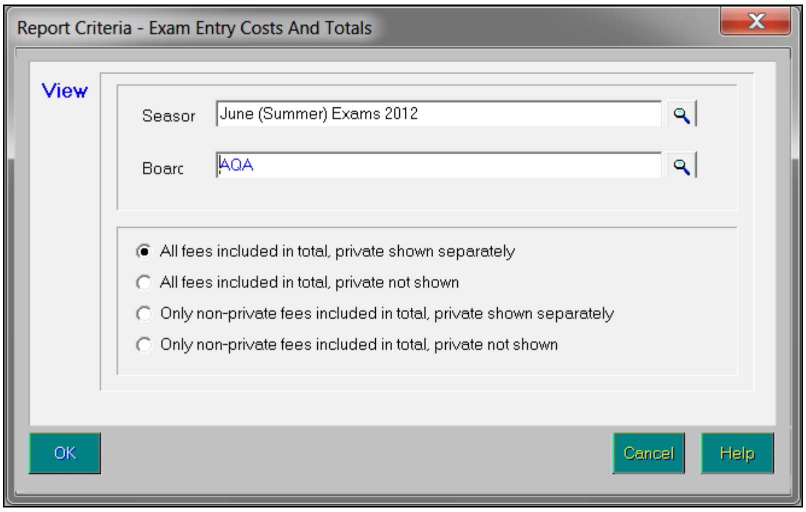
   The **Qualification** drop-down list only displays qualifications linked to awards.
6. Click the **Selections** Field Browser to display the **Component** chooser and select the components that you want to include in the report.
7. Click the **OK** button to produce the report.

Exam Entry Costs and Totals Report

This report produces a list, element by element, of the number of entries and unit costs, together with the total.

For the examination board selected, the report header consists of the season and examination board. The report body consists of the element code and title, level, unit fee, the number of candidates, total fees, the number of private candidates and the total of private fees (if selected).

1. Select **Reports | Entries | Exam Entry Costs & Totals** to display the **Report Criteria – Exam Entry Costs And Totals** dialog.



2. Select the required **Season** and **Board** by clicking the appropriate **Field Browser** buttons.

   The **Board** drop-down list only displays active boards.
3. Choose the type of fees to be included in the report by selecting the appropriate radio button.
4. Click the **OK** button to produce the report.

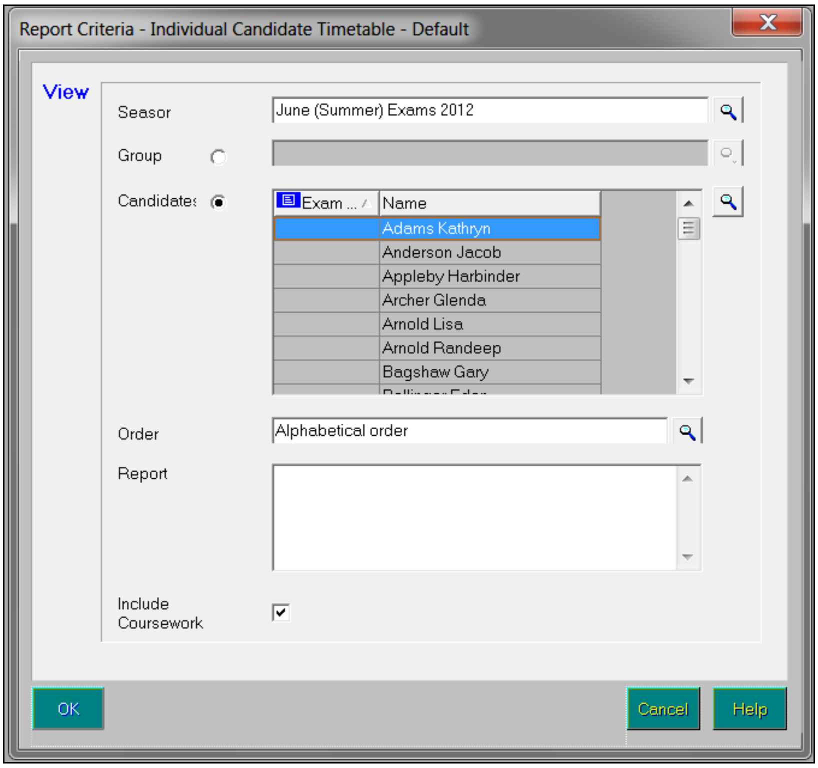
Individual Candidate Timetables (Default) Report

This report is similar to the Individual Candidate Timetables report as it provides a personal timetable for each candidate. However, this report extracts data directly from the imported basedata and does not provide information relating to Seating Organiser (exact times, venues, seating positions, clash resolutions, etc.).

For each candidate, the report header includes personal and school details and whether the candidate is eligible for special arrangements. The report body is a columnar list in two sections. The first section details the coursework components, if you elected to include this information in the report and includes details such as the examination board, element and component.

The second section details the Timetabled components and will always be displayed in the report. This section displays the date and time of the examination, the associated examination board, level and element details.

1. Select **Reports | Entries | Candidate Timetables – Default** to display the **Report Criteria – Individual Candidate Timetable – Default** dialog.



2. Select the **Season** and <u>either</u> the **Group** <u>or</u> the **Candidates** by clicking the appropriate **Field Browser** button.
3. Select an **Order** for the report and enter a **Report Footer** if required.

   The report footer can be used to add a note to candidates asking for any errors or omissions in the report to be reported to the Examinations Officer by a specific date.
4. Select the **Include Coursework Components** check box if you want the examination board, level, element, component, mark/grade and the date due to board of each coursework component to be included in the report.
5. Click the **OK** button to produce the report.

> *NOTE: The dates shown on this report are those published by the examination board and may not be final.*

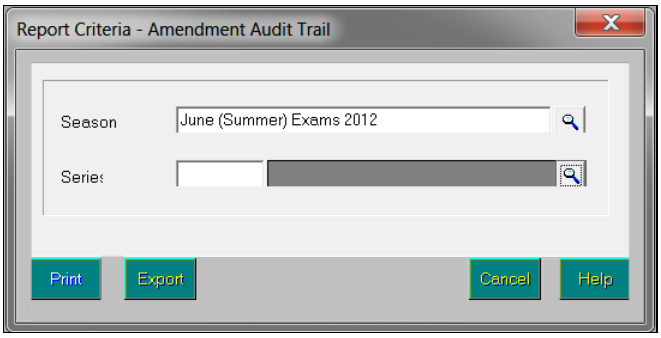
Amendment Audit Trail Report

This report enables Exams Officers to track the amendment history of candidates and elements. The report, based on the sequence of entry and amendment files relating to a selected series, details the additions and withdrawals submitted to the board.

For each submission file sent, the report header displays the season and series for which the report is being run.

The report body consists of the submission file name, date of submission, together with the contents of the submission, including the candidate name, submission status and the element code.

1. Select **Reports | Entries | Amendment Audit Trail** to display the **Report Criteria – Amendment Audit Trail** dialog.



2. Select the **Season** and **Series** by clicking the appropriate **Field Browser** buttons and selecting from the drop-down lists.

   The default season is the currently selected season and the series list displays only those within the selected season that have at least one amendment submission recorded.

3. To print the report, click the **Print** button to display the **Amendment Audit Trail** report.

4. Click the **Print** button to display the **Print** dialog and then click the **OK** button to print the report.

   To export the report, click the **Export** button to display the **Save As** dialog. Enter or select the filename and location where the export file will be saved. Select the required file type, either `.TXT` or `.CSV`, by selecting from the **Save as type** drop-down list and then click the **Save** button.

   IMPORTANT NOTE: *`.TXT` is the preferred format because it enables you to dictate to Microsoft Excel that fields that contain only numeric characters should nevertheless be treated as text fields – particularly significant in candidate numbers.*

   Exporting the data to a spreadsheet enables you to order it as required – by candidate, element, process, etc.

   The report is displayed or exported, as required.

Producing Candidate Labels

Two types of candidate label are available in this section. They can be created by selecting **Reports | Labels** and selecting the required label type.

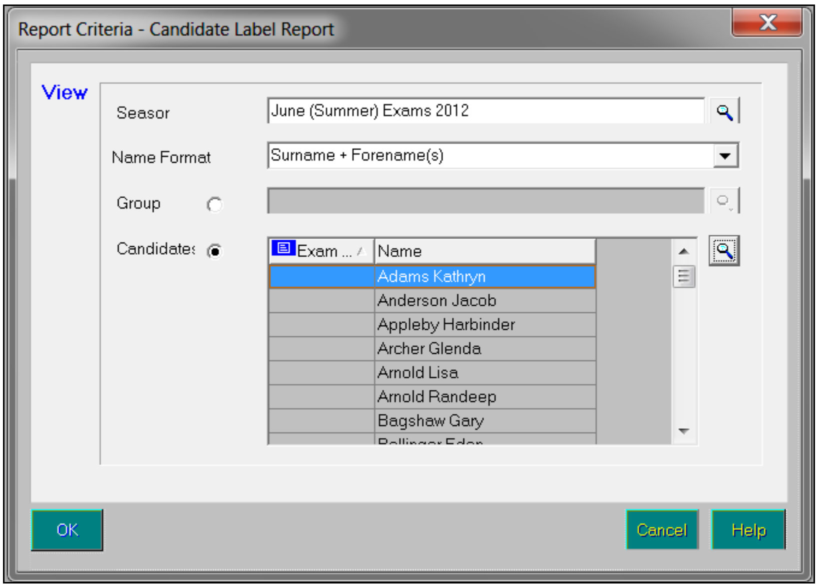
Candidate Labels

This report enables you to create labels for candidates, which can be used to allocate a desk in an examination room or to identify folders of work. This is particularly useful if you use Seating Organiser to resolve clashes and create component sittings but do not want to assign seats using Examinations Organiser.

For each label, the candidate's name, Year, Registration Group, Exam Number and UCI Number are printed.

IMPORTANT NOTE: *The label size is 7 ins x 2 ins (9.91cm x 3.81cm). The Avery reference for such labels is* ***L7163****. Due to the specific content of the label, the label size is fixed.*

1. Select **Reports | Labels | Candidates** to display the **Report Criteria - Candidate Label Report** dialog.



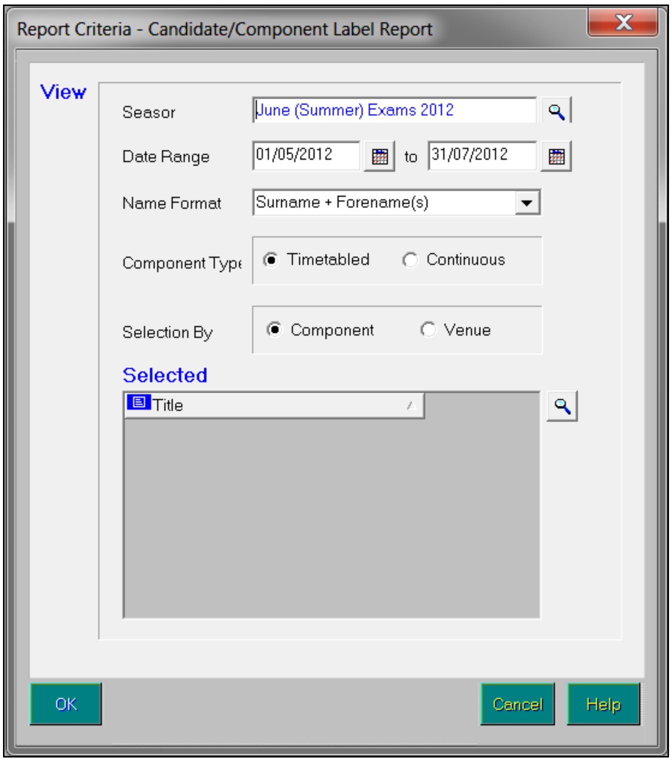
2. Select the required **Season** by clicking the **Field Browser** button.
3. Select the **Name Format** by selecting an option from the drop-down list.
4. Select <u>either</u> the **Group** <u>or</u> the **Candidates** by selecting the required radio button and clicking the appropriate **Field Browser** buttons.
5. Click the **OK** button to print the labels.

Candidate/Components Labels

This report enables you to create labels for candidate/component combinations, which can be used to allocate a desk in an examination room or to identify folders of work. This is particularly useful if you use Seating Organiser to resolve clashes and create component sittings but do not wish to assign seats using Examinations Organiser. Labels can be printed for both internal and external candidates in any open season.

For each label, the candidate's name, Year, Registration Group, Exam Number and UCI Number are printed.

1. Select **Reports | Labels | Candidate/Components** to display the **Report Criteria - Candidate/Component Label Report** dialog.



2. Select the required **Season** by clicking the **Field Browser** button.
3. Select the **Date Range** by either entering the required dates or clicking the **Calendar** buttons and selecting the required dates.
4. Select the required **Name Format** by selecting an option from the drop-down list.
5. Select either the **Timetabled** or **Continuous** radio button in the **Component Type** panel.

   Select the **Timetabled** radio button to select from a list of timetabled components or the **Continuous** radio button to select from coursework components.
6. Select the method by which components are to be selected by selecting either the **Component** or **Venue** radio button in the **Selection By** panel.

   The **Venue** radio button is disabled if you selected the **Continuous** radio button in the **Component Type** panel, as there is no examination venue for coursework components.
7. Click the **Field Browser** button in the **Selected** panel to display either the **Component** chooser or the **Venue** chooser.
8. Select the required components or venues by double-clicking their names in the **Available Items** panel or by highlighting the name then clicking the **Choose** button. Multiple items can be selected by holding down the **Ctrl** key and clicking each item, then clicking the **Choose** button. Select all items by clicking the **Choose All** button.

   All selected items are displayed in the **Chosen Items** panel.

9. Click the **Update** button to return to the **Report Criteria** dialog.

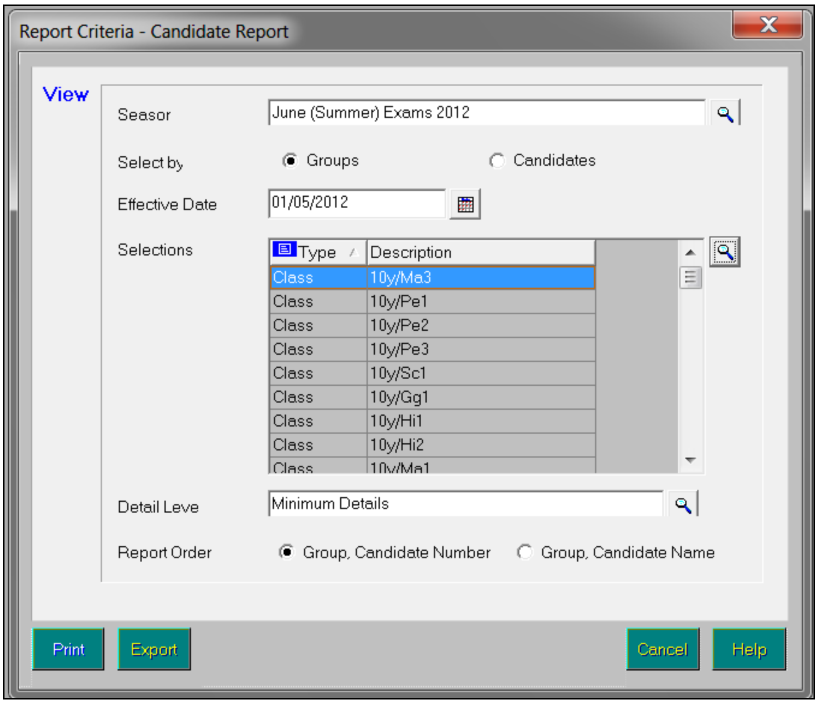
   All selected items are displayed in the **Selected** panel.
10. Click the **OK** button to print the labels.

Producing the Candidate Report

The purpose of this report is to enable a check to be made that the personal data to be submitted to the examination boards is correct.

Irrespective of the level of detail selected, the candidate's name, as formatted for submission to the examination boards, gender, date of birth, Examination and UCI numbers are displayed and whether the candidate is eligible for special arrangements. Depending on the level of detail selected in the **Report Criteria** dialog, other details including contact details, their name as displayed on any certificates (the formatted name) and elements for which the candidates have been entered, as well as a summary of the associated fees may also be displayed.

1. Select **Reports | Candidate Report** to display the **Report Criteria – Candidate Report** dialog.



2. Select the **Season** for the report by clicking the **Field Browser** button and selecting from the drop-down list.
3. Select the method of candidate selection by selecting either the **Groups** or **Candidates** radio button in the **Select by** section.
4. Enter the **Effective Date** for the report or click the **Calendar** button and select the required date. Alternatively, accept the default date, which is the first day of the selected season.
5. To select the candidates to include in the report, click the **Selections** Field Browser button and select either the group or the individual candidates to be included in the report.

6. Select the **Detail Level** for the report by clicking the **Field Browser** button and selecting the required option.
7. Select the radio button of the required **Report Order**.
8. Click the **OK** button to produce the report.

Additional Resources:

Important Information on the Usage of the Candidate Name Fields in the *Getting Started with Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook

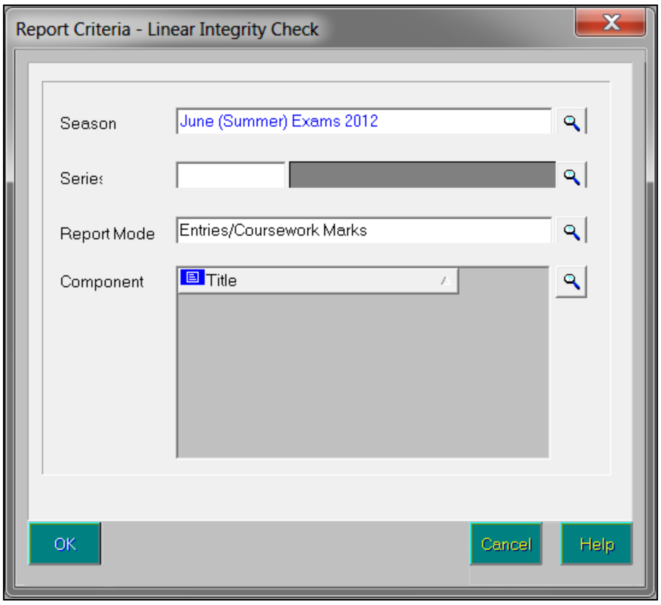
Linear Integrity Check Report

This report can be accessed by selecting **Reports | Checks | Linear Integrity Check**.

This report should be produced prior to generating a submission for a selected series. It is used to ensure that the necessary data has been entered and that orphaned results are not present in the system.

The report header displays the type of Integrity check being produced, the season, examination board and series. For each candidate, the report body consists of their name, Exam Number, element code, title, etc.

1. Select **Reports | Checks | Linear Integrity Check** to display the **Report Criteria – Linear Integrity Check** dialog.



2. Select the **Season**, **Series** and **Report Mode** by clicking the appropriate **Field Browser** buttons.
3. Select the **Components** by clicking the adjacent **Field Browser** button.
4. Click the **OK** button to produce the report.

Producing Seating Organiser Reports

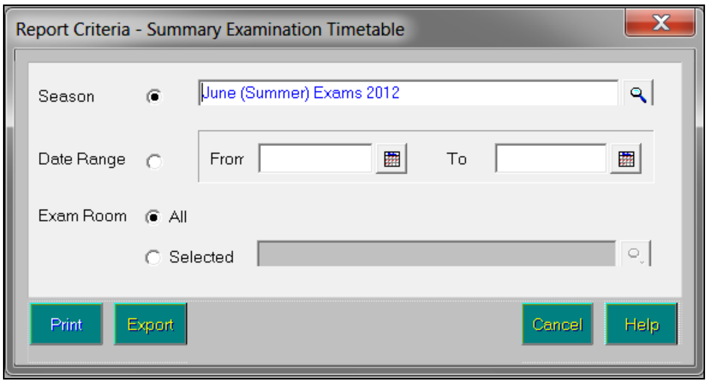
Eight reports are available in this section. These reports can be run by selecting **Reports | Seating Organiser** and selecting the required report.

Summary Examination Timetable Report

This report produces a summary of all the scheduled examination events within the selected season or specified date range.

For each examination, the report header includes either the season or the date range specified in the report criteria. The report body consists of the examination date, start time, room, duration and number of candidates, etc. The duration displayed is that of the candidate(s) granted the most amount of time (i.e. that of any candidate(s) eligible for Special Arrangements).

1. Select **Reports | Seating Organiser | Summary Examination Timetable** to display the **Report Criteria - Summary Examination Timetable** dialog.



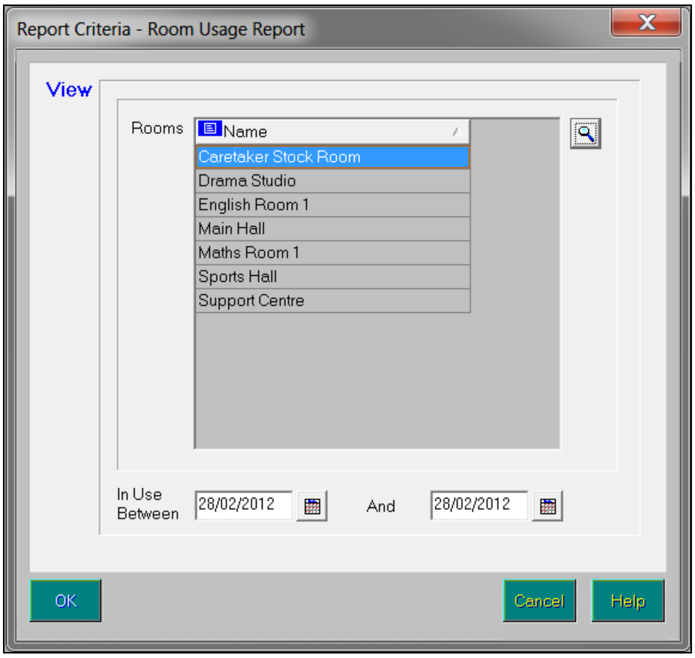
2. Select either the required **Season** or a **Date Range**, together with an **Exam Room**. Alternatively, you can select to run the report for **All** examination rooms.
3. Click the **OK** button to produce the report.

Exam Room Usage Report

This report displays a list of the usage of the chosen examination rooms within the specified date range. A new page is produced for each examination room selected.

The report header displays the selected date range, examination room and seating capacity of the room. The report body consists of the date, time, component title, duration and number of candidates, etc. The duration displayed is that of the candidate(s) granted the most amount of time (i.e. that of any candidate(s) eligible for special arrangements).

1. Select **Reports | Seating Organiser | Exam Room Usage** to display the **Report Criteria – Room Usage Report** dialog.



2. Select the **Rooms** and a date range from the respective Calendars.
3. Click the **OK** button to produce the report.

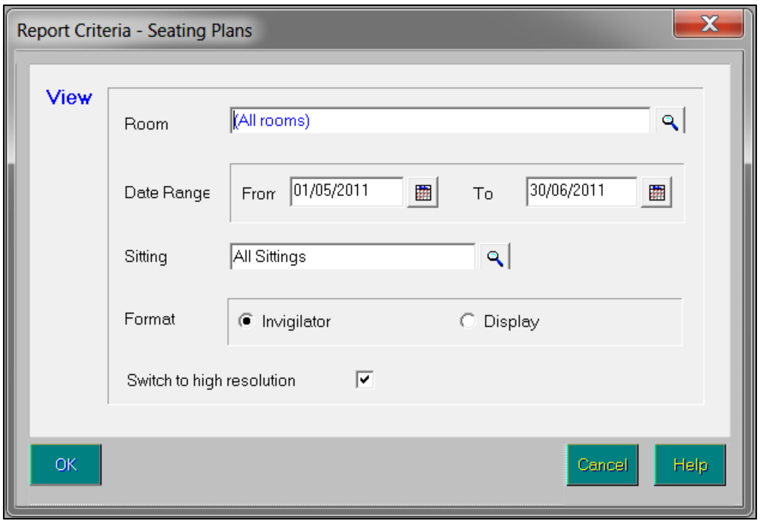
Seating Plans Report

This provides a seating plan of the examination sitting for a selected room. It enables invigilators to check for absentees and to ensure that all candidates are seated according to the prepared schedule.

The report header displays the selected rooms, the examination date, start time and seating capacity. The report body consists of a cell representing each occupied seat, showing the candidate’s name, component code, Exam Number and end time. Cells printed in italic font indicate seats already occupied at the start time of the plan, so that it shows all activity in the room, not just the items that start at the time indicated. Empty areas of the room are not printed, where this would involve printing blank sheets.

If a candidate is eligible for special arrangements and has been granted additional time for an examination, the end time displayed is inclusive of the additional time.

1. Select **Reports | Seating Organiser | Seating Plans** to display the **Report Criteria – Seating Plans** dialog.



2. Select the required **Room** by clicking the **Field Browser** button and selecting from the drop-down list.

   The **All Large** and **All Small** options enable you to view seating plans for all rooms of a certain size. The **All Large** option displays seating plans for all rooms with more than 14 rows <u>or</u> more than six columns. The **All Small** option displays seating plans for rooms with up to 14 rows <u>or</u> up to six columns.

   Seating plans for individual rooms can also be reported on, by selecting from the drop-down list.

3. Select the **Date Range** the report will cover by clicking the **Calendar** button and selecting the required dates, or by manually entering the dates.
4. Select the required **Sitting** by clicking the **Field Browser** button and selecting from the drop-down list.
5. Select the required report **Format** by selecting either the **Invigilator** or **Display** radio button. Selecting the **Display** radio button produces a similar report output, but the candidate end time is not displayed.

> *NOTE: If an individual candidate has been granted additional time to complete the examination, and will remain in the same room when the next examination sitting starts, their name is displayed in italics on the seating plan. If you have selected the **Display** format, the end time for such candidates are hidden, as is the italicised sittings.*

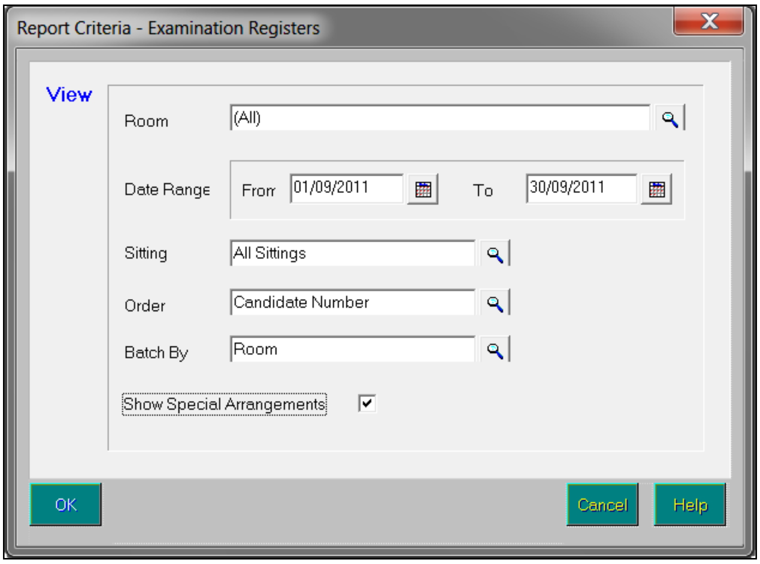
6. The **Switch to high resolution** check box is enabled only for rooms defined as 'large' (i.e. rooms that have more than 14 rows <u>or</u> more than six columns), and defaults to selected for all such rooms. Select or deselect this check box as required, to determine the layout of the report output.
7. Click the **OK** button to produce the report.

Examination Registers Report

This report provides a list of the expected candidates, together with their seating positions for each component sitting.

The report header displays the room, start time, date, duration, component code and exam title. For each candidate, the report body consists of their name, Exam Number, element code, seat code, whether they are present at the examination and whether they are eligible for special arrangements.

1. Select **Reports | Seating Organiser | Examination Registers** to display the **Report Criteria – Examination Registers** dialog.



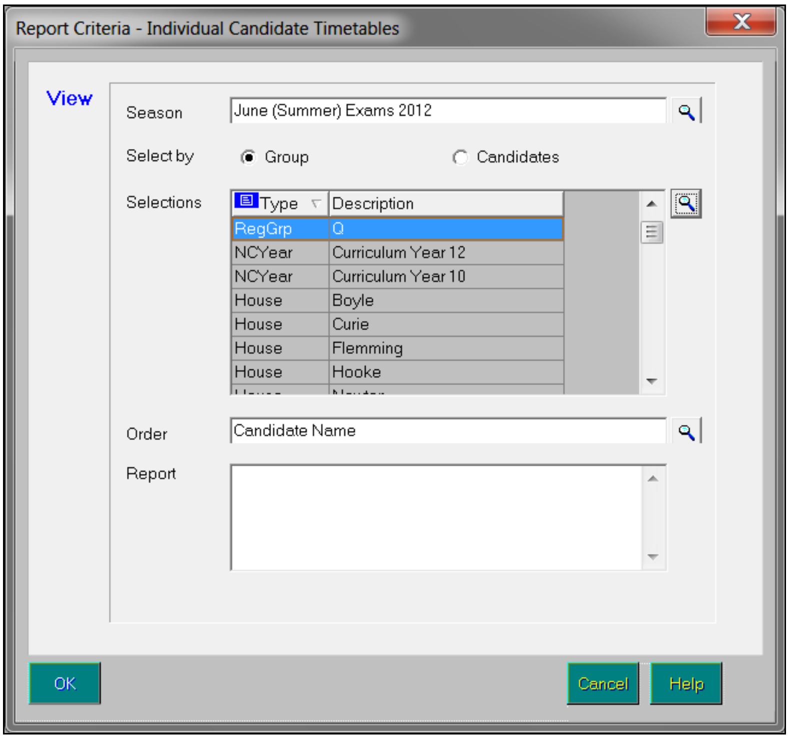
2. Select the required **Room** by clicking the **Field Browser** button and selecting from the drop-down list. The default is **(All)** rooms.
3. Select the **Date Range** to be covered in the report by clicking the **Calendar** button and selecting the required dates; or by manually entering the dates.
4. Select the required **Sitting** by clicking the **Field Browser** button and selecting from the drop-down list.
5. Select how you want the report to be ordered, i.e. by **Candidate Number**, **Name** or **Seat**, by clicking the **Field Browser** button and selecting from the **Order** drop-down list.
6. Select how you want the report to be batched, i.e. by **Room** or by **Date**, by clicking the **Field Browser** button and selecting from the drop-down list.
7. Select the **Show Special Arrangements** check box if you want the details of candidate's special arrangements to be included in the report. Candidates who have been assigned any special arrangements can be identified by an asterisk adjacent to their name on the initial report output. A subsequent page of the report is produced for each candidate who has been assigned any special arrangements. This page details their individual requirements and any additional extra time and pertinent comments.
8. Click the **OK** button to produce the report.

Individual Candidate Timetables Report

This report is produced for distribution to individual candidates within each season. It provides a personal timetable that shows clash resolutions and exact times, venues and seating positions.

The report header displays the season, candidate name, Exam Number, UCI number, Centre number, Year and Reg. Group details, the Centre number and whether they are eligible for special arrangements. For each examination, the report body consists of the date and start time, examination board, element code, component title, room, seat number, etc.

1. Select **Reports | Seating Organiser | Individual Candidate Timetables** to display the **Report Criteria – Individual Candidate Timetables** dialog.



2. Select the **Season** for the report by clicking the **Field Browser** button and selecting from the drop-down list.
3. Select the method of candidate selection to include in the report by selecting either the **Group** or **Candidates** radio button in the **Select by** section.
4. Click the **Field Browser** button in the **Selections** section and select either the group of candidates or individual candidates to be included in the report.

   If you select multiple groups, this determines the batching of the report output. For example, if you select six registration groups, timetables are printed in the selected order within the registration group. If the groups you choose are of different types, multiple copies are printed for any student who is in more than one of the selected groups.
5. Select a report **Order** by clicking the **Field Browser** button and selecting **Candidate Name** or **Exam Number** from the drop-down list.
6. Enter a **Report Footer**, if required.
7. Click the **OK** button to produce the report.

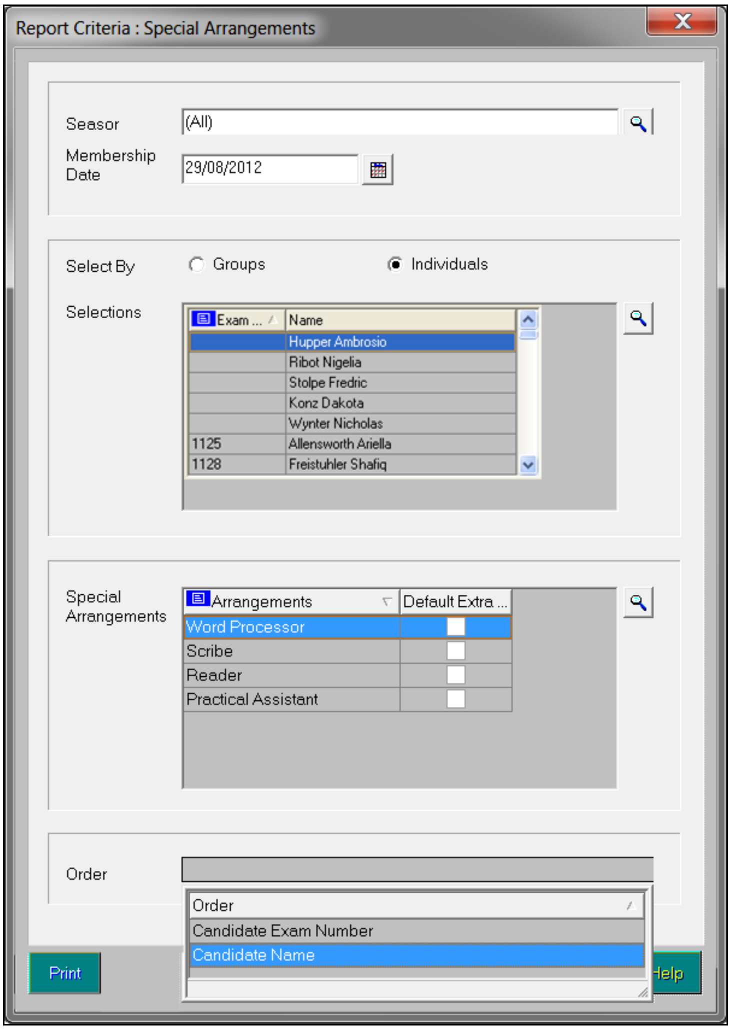
Additional Resources:

Important Information on the Usage of the Candidate Name Fields in the *Getting Started with Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook

Candidate Special Arrangements Report

This report enables you to see the pupil/students who have been assigned special arrangements to assist them when sitting their examinations. By printing this report you can ensure that the necessary preparations are in place for the relevant pupil/students.

1. Select **Reports | Seating Organiser | Candidate Special Arrangements** to display the **Report Criteria - Special Arrangements** dialog.

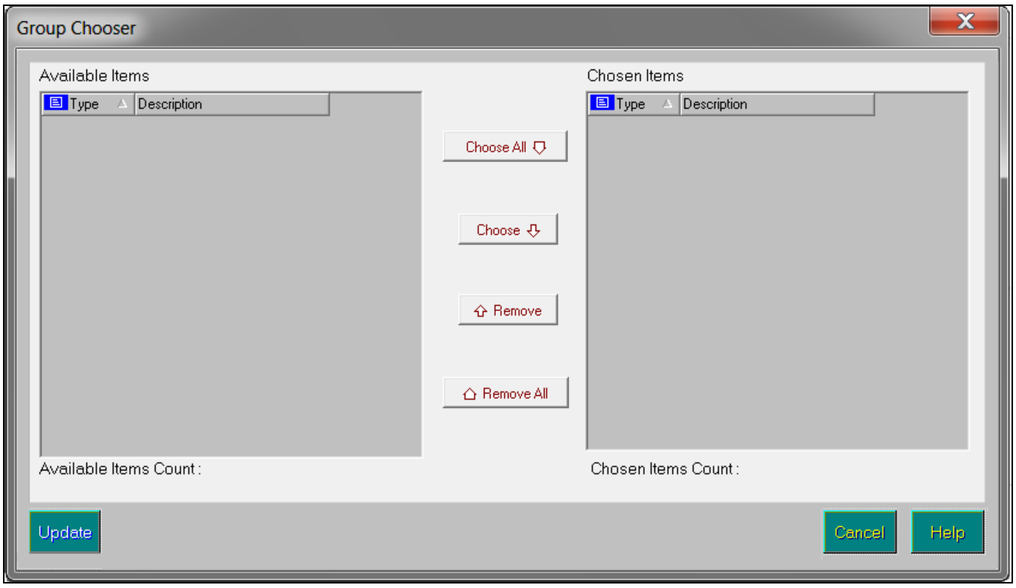


2. Select the **Season** for which you want to run the report by clicking the **Field Browser** button and selecting the required season from the drop-down list. You can also select **<All>** to view values for all seasons.

The **Membership Date** defaults to the **Start** date of the selected season. It can be changed by clicking the **Calendar** button and selecting a different date or by manually entering the required date in the field. If you have selected **<All>** from the **Season** drop-down list, the date in this field defaults to today's date.

3. Select either the **Groups** or the **Individuals** radio button adjacent to the **Select By** field. This enables you to specify the population of the report.
4. Click the **Field Browser** button in the **Selections** panel.

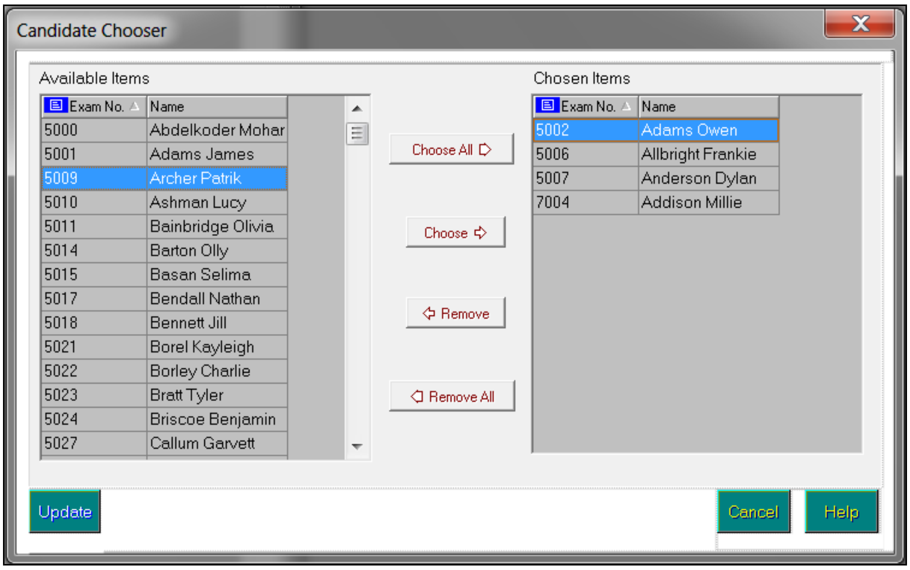
   If you selected the **Groups** radio button, the **Group Chooser** dialog is displayed.



5. Select the required group(s) by double-clicking the **Description**(s) or by highlighting them and clicking the **Choose** button. Multiple groups can be selected by clicking the **Choose All** button.
6. If you make a mistake in your selection, highlight the group **Description** and click the **Remove** button. Alternatively, click the **Remove All** button and begin your selection again.

   All selected groups are displayed in the **Chosen Items** pane of the **Group Chooser** dialog.
7. Click the **Update** button to return to the **Report Criteria - Special Arrangements** dialog.

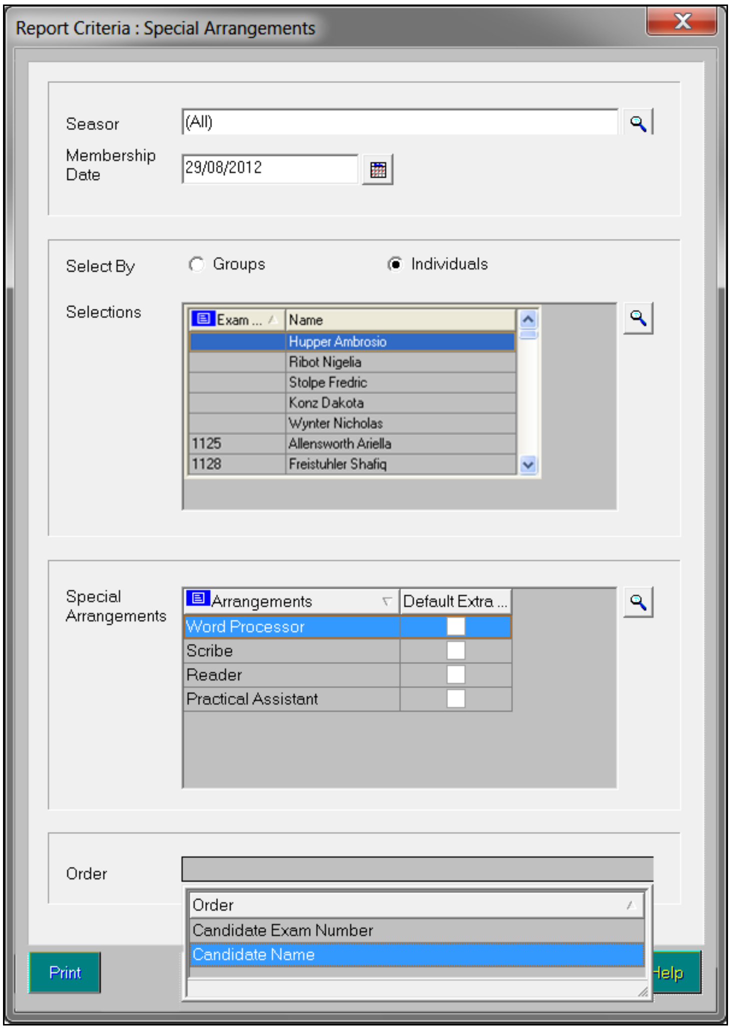
If you selected the **Individuals** radio button, the **Candidate Chooser** dialog is displayed.



8. Select the required candidates by double-clicking their names or highlighting their name and clicking the **Choose** button. Select all the candidates by clicking the **Choose All** button.
9. If you make a mistake in your selection, highlight the candidate's name and click the **Remove** button. Alternatively, click the **Remove All** button and begin your selection again.

   All selected candidates are displayed in the **Chosen Items** pane of the **Candidate Chooser** dialog.

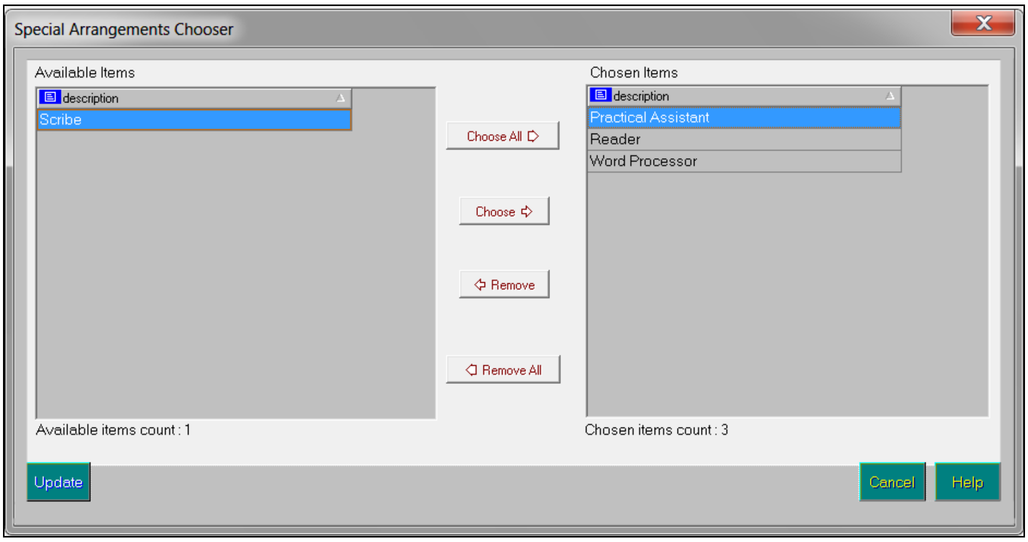
10. Click the **Update** button to return to the **Report Criteria - Special Arrangements** dialog.



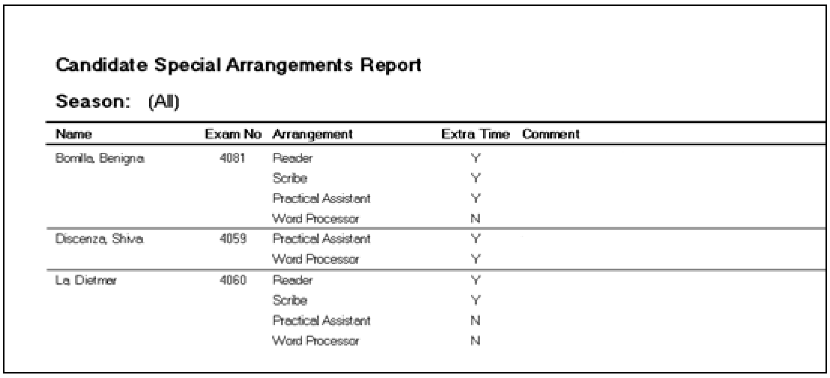
The **Selections** are displayed.

By default, all the **Special Arrangements** that are defined in Exams are displayed in the **Special Arrangements** panel. You may want to remove some of these from the report parameters before running the report.

11. Click the **Field Browser** button to display the **Special Arrangements Chooser** dialog.



12. Highlight the **Chosen Items** that you do not want to be included in the report by using the **Remove** and **Remove All** buttons, where appropriate.
13. Click the **Update** button to return to the **Report Criteria - Special Arrangements** dialog.
14. Click the **Field Browser** button to select the required **Order** for the report. You can select either the **Candidate Exam Number** or the **Candidate Name**.
15. Click the **Print** button to print the report.



Candidate Special Arrangements Report

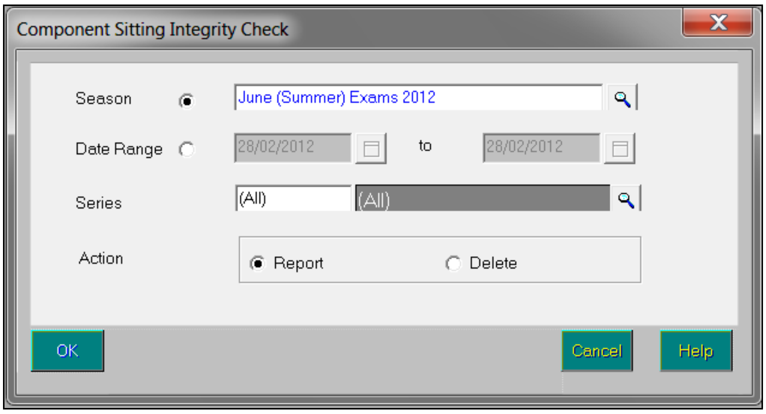
Season: (All)

Name	Exam No	Arrangement	Extra Time	Comment
Bonilla, Benigna	4081	Reader	Y	
		Scribe	Y	
		Practical Assistant	Y	
		Word Processor	N	
Discenza, Shiva	4059	Practical Assistant	Y	
		Word Processor	Y	
La, Dietmar	4060	Reader	Y	
		Scribe	Y	
		Practical Assistant	N	
		Word Processor	N	

Running the Component Sitting Integrity Report

This report identifies candidates who have been assigned a seat for an examination but have since been withdrawn from sitting it. This enables the Exams Officer to remove that candidate from the seating plan manually. Alternatively, this routine can be used to delete such candidates from the seating plan automatically.

1. Select **Tools | Component Sitting Integrity Check** to display the **Component Sitting Integrity Check** dialog.



2. Select either the **Season** or the **Date Range** radio button to determine the reporting range.

   If you select the **Season** radio button, click the adjacent **Field Browser** button and select the required season from the drop-down list. You can select **<All>** to view values for all seasons.

   If you select the **Date Range** radio button, click the appropriate **Calendar** buttons and select the required start and end date from the Calendar, or enter the dates directly in the date fields.

   If you have selected a season, rather than a date range, you must specify a series.
3. Select the required **Series** by clicking the appropriate **Field Browser** button. The drop-down contains all the series of the selected season, along with **All**, which is the default value.
4. In the **Action** panel, select the outcome of running this check.

   Select the **Report** radio button if you want to view the outcome on screen for analysis. Selecting this option displays the information in report format on-screen, informing you that the candidates in the report are seated for a component but do not have a corresponding entry.

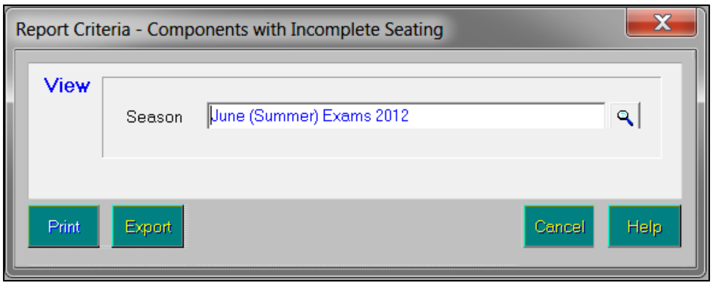
   Select the **Delete** radio button if you want the integrity check to search for candidates who have been seated for a component but do not have a corresponding entry, and then remove the candidate from the seating plan. Prior to deletion, the number of candidates who will be removed from the seating plan are displayed and you are asked to confirm the deletion. Once the candidate(s) have been removed and you return to the component sitting in Seating Organiser, you will see that they have been removed from the seating plan.
5. Click the **OK** button to perform the required function.

Components with Incomplete Seating Report

This report lists any components with unseated candidates enabling you to ensure that all candidates have been seated.

The report header displays the season. For each component, the report body consists of the date, start time, examination board, component title, duration, seating details, etc.

1. Select **Reports | Seating Organiser | Components with Incomplete Seating** to display the **Report Criteria – Components with Incomplete Seating** dialog.



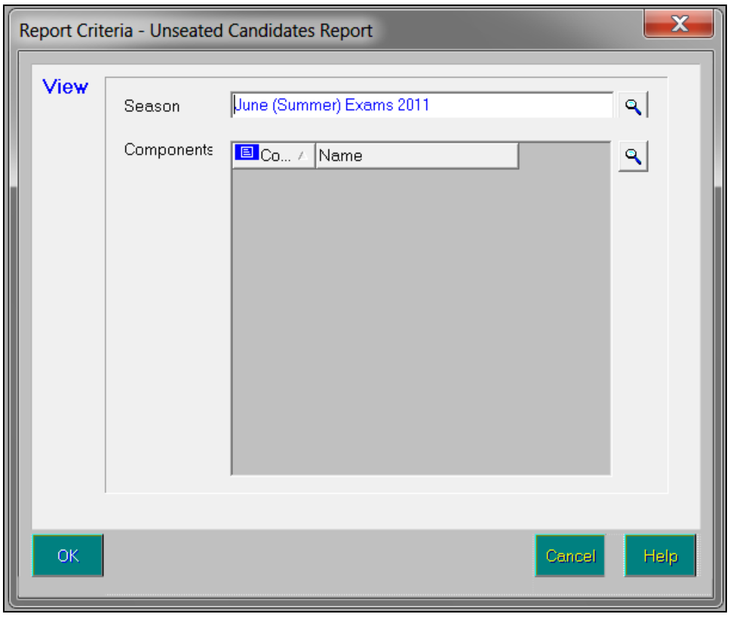
2. Select the **Season** to base the report on by clicking the **Season** Field Browser button.
3. Click the **OK** button to produce the report.

Unseated Candidates Report

This report is used to expand selectively on the information provided by the Components with Incomplete Seating report.

The report header displays the season, examination board, date, component title, start time, etc. For each candidate, the report body consists of their name, Exam Number and element code and title.

1. Select **Reports | Seating Organiser | Unseated Candidates** to display the **Report Criteria – Unseated Candidates Report** dialog.

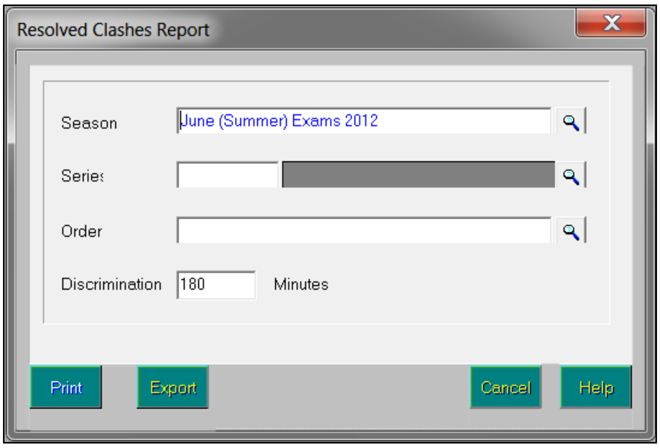


2. Select the **Season** and the **Components** to include in the report by clicking the appropriate **Field Browser** buttons.
3. Click the **OK** button to produce the report.

Resolved Clashes Report

This report lists occasions where a candidate is sitting a component at a time that varies from that declared in the basedata component record.

1. Select **Reports | Seating Organiser | Resolved Clashes** to display the **Resolved Clashes Report** dialog.



2. Select the **Season** and **Series** by clicking the appropriate **Field Browser** buttons and selecting from the drop-down lists.
3. Select a report **Order** by clicking the **Field Browser** button and selecting **Candidate Name**, **Candidate Number**, **Component** or **Series** from the drop-down list.
4. Enter the **Discrimination** (in minutes). This is the number of minutes (1-300) either side of the original start time at which the component will be sat. The default value of 180 is selected to identify components that have been moved into an adjacent session.
5. Click the **Print** button to produce the report or the **Export** button to export the report to file.

   If you select to export the report, the **Save As** dialog is displayed. Select the **Path** and enter the **File name** for the report you are saving. Select the appropriate file format from the **Save as type** drop-down list. Click the **Save** button to export the report to the required destination using the specified file name.

10| Additional Information

How an Optical Mark Reader Works 147
Setting Up an Optical Mark Reader 148

How an Optical Mark Reader Works

An Optical Mark Reader 'reads' marks on a specially designed sheet or **OMR form**.

The marks on the paper are detected by the reflection of light from the light source that fall on to the sensor. Each sheet is printed in a colour invisible to the OMR, known as the drop-out colour. The light used is either red or infra-red, so anything on the sheet printed in red will not be detected by the sensor. The drop-out colour may also be green. Typical OMR sheets will have the title and sub-headings printed in black and the areas to be filled are in red.

OMR sheets must be printed and guillotined to very precise tolerances, otherwise the marks made on them could be slightly out of alignment with the OMR's read heads, causing the sheets to be misread. Also, the precise shade of the drop-out colour must be carefully controlled during the printing process. For these reasons, OMR sheets are normally pre-printed by the OMR manufacturer to SIMS specifications.

The sheet to be read is considered to be divided into a matrix of read areas, each with rows and tracks. Typically, an OMR has exactly 42 tracks and typically 66 rows.

Each track corresponds to an individual light sensor and is parallel to the reference edge of the sheet and a fixed distance from it. The normal distance of this track is 0.2 inch.

The reference edge of the sheet is printed with a series of black blocks arranged vertically which may or may not be the same width, depending on the particular sheet. These correspond to the number of rows in each sheet. The black blocks are called the clock track or timing track. For example, the read areas available on a sheet used in Attendance consist of 38 tracks and 66 rows. Each track is 0.2 inches in width and there are 6 rows to an inch.

In actual use, it is unlikely that more than a few hundred of these read areas would be used on most sheets. A typical A4 sheet contains about 2400 read areas.

There are smaller blocks (see diagram) which are used to ensure that the paper is not skewed. In the track 2 position, there are a series of thin black rectangles, which identify the sheet.

In the top half of the sheet, there is a long red line, this is for testing purposes only.

White Line Test

This is a line printed in the drop-out colour (usually red). It is used to determine black and 'white' or mark and no mark. It is essential that the line is not marked in any way.

It is possible that due to a mark on the line or a fault in the read head, the line is read and the test fails.

Black Line Test

At the bottom of the sheet, there is a long black line. This line checks that every read head will register marks. If any part of the line is not read, the test fails.

The OMR performs its own auto-calibration. If the OMR passes a sheet backwards and forwards a number of times, it is calibrating its sensitivity to black and 'white' (in this context, 'white' is effectively the drop-out colour).

Consult your OMR user manual for more information on setting up these tests.

The white line, black line and skew tests are used to check that the OMR is working properly and that the sheet is being fed through the reader correctly.

OMR Supplier Information

Pre-printed data entry sheets for use with the OMR can be obtained from:

DRS Data & Research Services plc
Sunrise Parkway
Linford Wood
Milton Keynes
MK14 6LR

Telephone: (01908) 666088

Fax: (01908) 607668

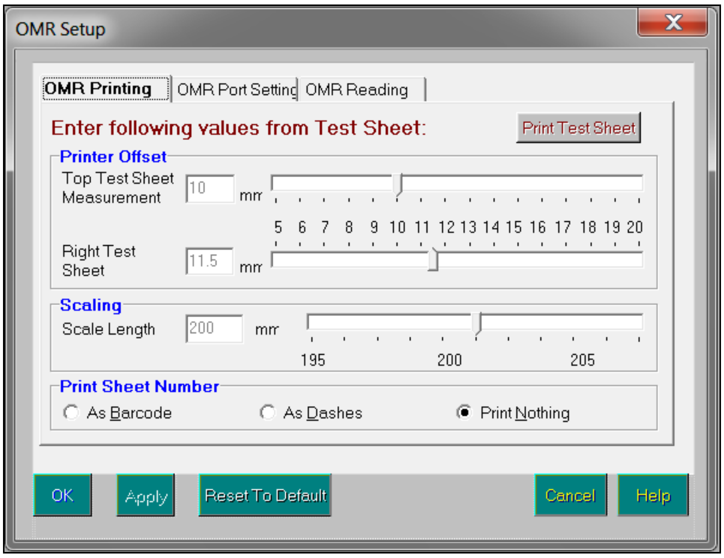
Setting Up an Optical Mark Reader

There are numerous options available for configuring your OMR but once it has been correctly set up and is working properly, it is unlikely that any settings will need to be adjusted until a new delivery of OMR sheets is received.

To adjust the OMR settings, select **Tools | OMR Setup** to display the **OMR Setup** form.

OMR Printing Page

The adjustments available on this page should only be applied after printing and reviewing a test sheet which is generated by clicking the **Print Test Sheet** button. The resulting test sheet enables you to take measurements, which can be entered in this page to ensure the accuracy of printing OMR sheets.



The following adjustments are available:

Printer Offset

The printer offset determines the distance from the edge of the paper to the printer boundary. The printed test sheet displays arrows enabling the distance from the top and the right of the test sheet to be measured. Once measured, these values should be entered in the **Top Test Sheet Measurement** and **Right Test Sheet Measurement** fields accordingly. Alternatively, the sliders can be used to select the required values.

Once these values have been entered, no further adjustment should be needed until a new delivery of OMR sheets is received or unless the current printer is changed.

Scaling

A vertical arrow is displayed on the OMR test sheet. The length of this arrow should be measured and the value entered in the **Scale Length** field. Alternatively, the slider can be used to select the required value.

Print Sheet Number

The sheet numbers for the different types of OMR sheet are all in the same series of numbers. For example, if you print six registration sheets and they are numbered one to six, then you print three absence sheets they are numbered seven to nine, then another four registration sheets, so they are 10 to 13 and so on.

There are three ways in which the sheet number may be recorded. Select one of the following radio buttons according to your requirements.

- **As Barcode** If barcode printing is enabled, then the sheet number is printed as a barcode alongside the sheet number box.
- **As Dashes** If this option is selected, then the sheet number is represented by dashes in the sheet number box. Please note that when a test sheet is printed the dashes are not part of the test and should therefore be ignored.
- **Print Nothing** Select this option if you wish to manually enter sheet numbers.

OMR Port Settings Page

The majority of the settings on this page are automatically set and should not require adjustment unless you are experiencing problems connecting to the OMR.

If you need to make any adjustments to these settings, do so in the following order:

1. Change the settings as appropriate (i.e. baud rate, parity, etc.).

   NOTE: It is likely that you will need to change the baud rate to either 1200 or 2400.

2. Click the **Apply** button to confirm the settings.
3. Switch the OMR off and on again. This discards any previous initialisation settings and resets the OMR.
4. Wait for the OMR to 'beep' and the light to change from green to red.
5. Click the **Test OMR Port** button and wait several seconds until the report or message is displayed.
6. Click **OK** to save the new parameter(s). You may wish to move to another tab to check more parameters before clicking **OK**.

Port

There are likely to be two or more ports available. Your choice of port will depend on the type of connector the OMR has, together with any other devices that may be using that port.

Parity

As data is sent, checks are made that the data being sent from the OMR is the same as that being received by the computer. This setting should only be changed on direct advice from your OMR supplier or your Local Support Unit.

Data Bits

Refers to the number of bits per character. This setting should only be changed on direct advice from your OMR supplier or your Local Support Unit.

Stop Bits

Refers to the number of bits sent to indicate the end of a character. This setting should only be changed on direct advice from your OMR supplier or your Local Support Unit.

Baud Rate

This is a measure of the rate at which data is sent from the OMR to the computer. Select the required value from the drop-down list. In most circumstances, the setting should be left at 19200.

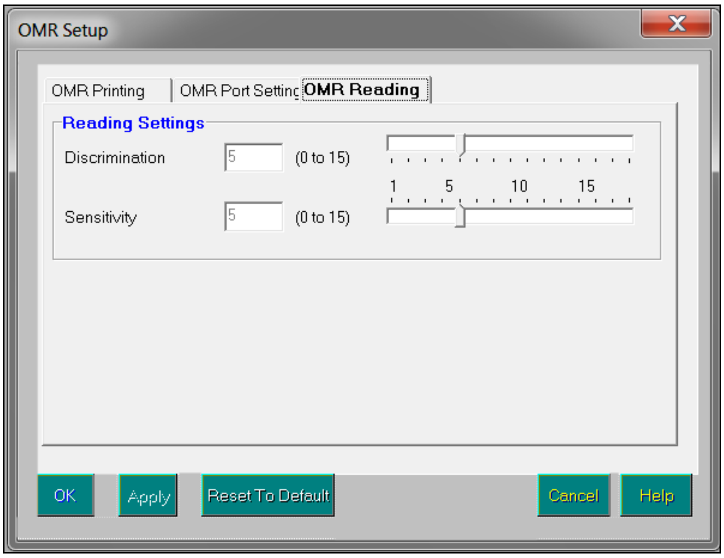
If you experience problems connecting to the OMR or persistent read problems, try resetting the value to 9600 or 1200/2400, noting that the OMR must be switched off and then on again to initialise the new setting.

Test OMR Port Button

Ensure that the OMR is switched on, then click this button to attempt communication with the OMR. A message is displayed, advising whether the communication has been successful. If the connection has failed, try reducing the baud rate, then retesting the connection, noting that the OMR must be switched off and then on again to initialise the new setting. If this does not resolve the problem, switch off the OMR, reboot the machine, then switch the OMR on and try again.

Changing Sensitivity and Discrimination Settings

The **Discrimination** and **Sensitivity** settings determine how the OMR will interpret different marks on OMR sheets. These settings are used to distinguish a genuine mark from an erased mark, partial mark or dirt/crease on OMR sheets.



The OMR measures the size, darkness and sharpness of marks on the OMR sheets and combines these to produce a single *mark density value (score)* for each read area. These scores range from 0-15, where 0 represents no mark and 15 represents a very good mark.

The **Sensitivity** setting determines the minimum threshold score that the OMR will recognise as a clear mark and therefore defines how leniently or strictly the software will interpret marks. The mark on the OMR sheet must produce a score greater than 5 for it to be accepted.

- If you are experiencing problems reading faint lines on an OMR sheet – reduce the **Sensitivity** setting.

- If you have OMR sheets that are crumpled or dirty, it is worth increasing the **Sensitivity** setting, perhaps to 8, to ensure that only clear, dark lines are recognised as valid.

  The **Discrimination** setting is used to set the minimum difference between the densities of competing marks. The setting is set by default to 5. Lowering the **Discrimination** forces the OMR to discriminate between marks that are very similar. This reduces the number of multiple mark errors, but risks the OMR making arbitrary decisions. Increasing this value reduces the scope of discrimination, except where the difference between the marks is obvious. This reduces the risk of marks being incorrectly discriminated, but increases multiple mark errors.
- If you are experiencing a high number of multiple mark errors, reduce the **Discrimination** setting.

Example:

Both **Discrimination** and **Sensitivity** are set to 5.

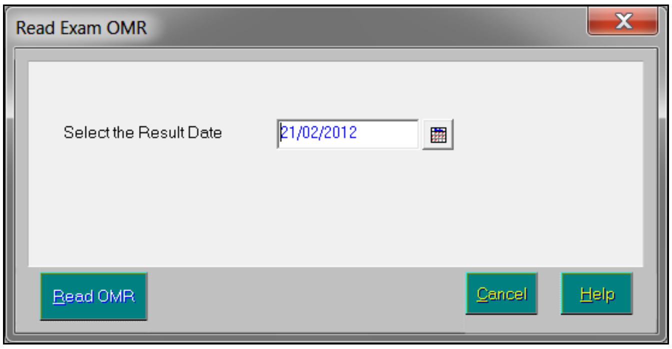
Two marks are read that are above the **Sensitivity** setting with scores of 10 and 7 and therefore pass the minimum threshold of 5. The difference between these scores is 3 which is lower than the **Discrimination** setting of 5 and are both marks are accepted. A multiple marks error may be produced.

Two marks are read that are above the **Sensitivity** setting with values of 10 and 4 and therefore pass the minimum threshold of 5. The difference between these values is 6 which is above the **Discrimination** setting of 5 and the mark with the highest score is accepted.

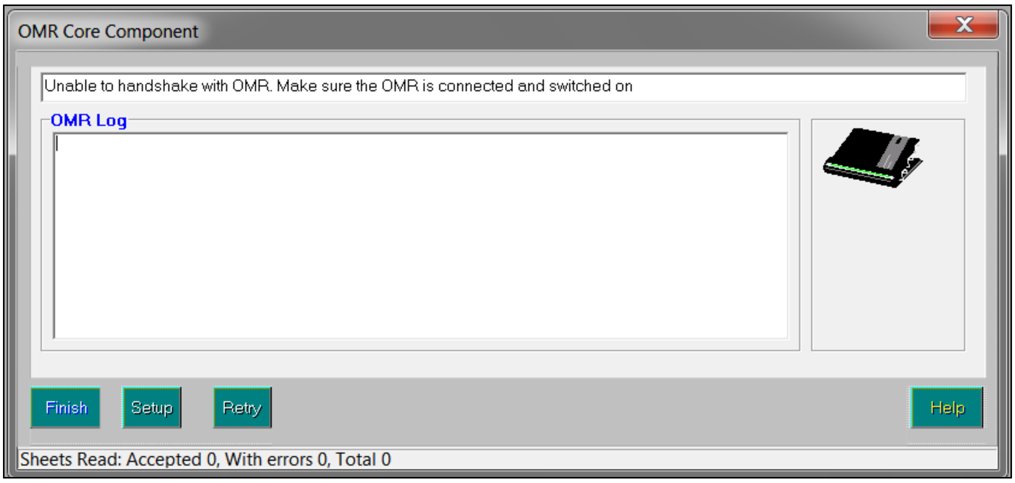
Unable to Handshake with OMR

1. Select **Focus | Read OMR** to display the **Read Exam OMR** dialog.

   The **Select the Result Date** defaults to today's date but this can be changed by selecting an alternative date from the Calendar.



2. Click the **Read OMR** button to display the **OMR Core Component** dialog. The system now attempts to communicate with the OMR. If this handshake attempt is unsuccessful an error message is displayed at the top of the screen.



Firstly, check that the OMR is connected and switched on, then check the OMR settings:

3. Click the **Setup** button to display the **OMR Setup** form.
4. Click the **OMR Port Settings** tab.
5. Make any adjustments necessary and click the **OK** button to return to the **Read OMR** screen (please see *OMR Port Settings Page* on page *150*).
6. Click the **Retry** button.

Glossary

Aspect

An aspect is the definition of an assessment used to hold predicted grades, record final results, record results for any endorsements, hold indication of entry and record coursework marks or grades. The definition includes what is to be assessed, the manner in which it is assessed and a range of acceptable grades.

Award

An award is defined in terms of an examination board, level, title and the course to which it relates. It specifies the qualification aim that members of a Course are directed towards. As basedata for successive series is imported from the examination boards, users will attach the options, units, certifications (elements), etc. to the appropriate award(s), to indicate the steps that eligible candidates may take towards certification.

Awarding Body (Organisation)

Any authority or agency recognised as competent to assess and issue qualifications in any academic or vocational field.

Board

Any authority or agency recognised as competent to assess and issue qualifications in any academic or vocational field.

Most activity will take place in relation to the three Unitary Awarding Bodies (UABs) in England – namely Edexcel, AQA and OCR – and their equivalent in Wales and Northern Ireland, WJEC and NICCEA.

Centre

An establishment licensed to administer examinations. All secondary schools are centres.

Centre Number

All centres have a 5-figure centre number issued by the National Centre Registry at Cambridge. A few colleges, particularly if they arise from an amalgamation of geographically separated sites, have more than one.

Certification Claim

The entry code required by the examination board signifies that, in the eyes of the school, the candidate has completed the requirements for certification and is now claiming the certification.

Component

A component is an examinable task that constitutes the whole or part of what a candidate must present to satisfy the requirements for an element. It may be a timed paper, a practical exercise, a coursework assignment, a test or a portfolio.

EDI

Electronic Data Interchange – the transfer of computer data from one computer system to another via a modem link.

Element

An element is a term used within Examinations Organiser to refer to a record in the 'O' (Options) basedata file. It may be an option in the traditional sense, a module, a unit, a registration or a certification claim – anything for which the board requires notification of candidate entry.

Enrolment

A dated link between a candidate and an award. It indicates a commitment on the part of the candidate to work towards one or more of the outcomes contained by the award.

This entity is not currently in use.

Entry

A link between a candidate and an element.

Examination Board

Any authority or agency recognised as competent to assess and issue qualifications in any academic or vocational field.

Most activity will take place in relation to the three Unitary Awarding Bodies (UABs) in England – namely Edexcel, AQA and OCR – and their equivalent in Wales and Northern Ireland, WJEC and NICCEA.

External Candidate

For a person to be considered for taking an examination, they must first be recognised as a candidate in Examinations Organiser. Registering a person as an external candidate consists of associating them with a season and allocating both an exam number and a UCI number.

> *NOTE: You cannot add external candidates if the season is locked or closed.*

Option

An option is anything for which the examination board requires notification of candidate entry. The Examinations Organiser term for this is 'element'.

QCA Code

QCA is the Qualifications and Curriculum Authority, the regulating body for all curriculum and assessment in schools. The QCA Subject Classification Code (formerly known as the LEAP code or SCAA code) is the standard subject code used for the subject-by-subject analysis in the Schools Performance Tables. Every certification element will have a QCA code, although the examination board may not include it in the 'O' file; units/modules are not subject to PI analysis and a code may not have been issued by QCA at this level and therefore will not appear in the 'O' file. However, these codes are the only standardised way of referencing subjects and are therefore used by SIMS Analysis to categorise elements by subject. The field is made editable in the element properties dialog to enable users who wish to perform such analysis at unit level to do so.

The QCA code is also known as the discount code.

QN

The Qualification (Accreditation) Number.

Qualification

In the context of basedata, a qualification indicates a framework for assessment, which may exist at a variety of levels. Examples are GCSE, GCE, VCE and GNVQ.

Result Set

Used in SIMS Assessment to collate results to be processed in a single 'view'. A season in Examinations Organiser maps directly to a result set in SIMS Assessment.

Season

A timeframe in which examinations are administered and are entirely user-defined. It is anticipated that a season will contain examinations of a generally similar character, e.g. external, Key Stage, internal, etc. seasons may run concurrently, but only one season can be current at a given time. All activity under the **Focus** menu operates within the selected season.

Season Pattern

Provides a way of grouping a set of examinations that are normally sat at a given time each year. They consist of a code, title, description and set of associated months. A *season* is then created based on a selected season pattern.

Series

A collection of syllabuses, options, components, etc. defined by the examination board for its own administrative purposes to manage the entry of the results process. A series will usually, although not always, have a single closing date for entries, together with a defined date for the return of results.

Template

The definition of a set of columns that are merged with a group of candidates to produce a marksheet.

UCI

Unique Candidate Identifier – a 12-digit number with a check letter, primarily used to track individual students who change schools during a modular course. It is calculated by the school's MIS from an algorithm defined by the Joint Council.

Index

A

activating
- seats 97

adding
- external candidate entry 30
- external candidates 21
- grades/marks for individual candidates 66
- internal candidate entry 16
- internal candidates 11
- marksheets and templates 52
- marksheets using existing templates ... 57
- notes to marksheet row 69
- omr sheets and templates 38
- omr sheets using existing templates.... 43
- seating plan 98

allocating
- additional time to candidate with special arrangements in examination 94

alternating columns 99

amending
- column width 70
- display order 69
- marksheet orientation 71

amendments
- submitting 82

aspects
- introduction 52

B

batch creation
- marksheets 59

black line test
- omr 148

booking
- viewing 100

C

candidate
- reports 132

candidate status
- changing from external to internal....... 33
- changing from internal to external....... 19

candidates
- adding external 21
- adding internal 11
- adding/editing/viewing external entries 30
- adding/editing/viewing internal entries 16
- allocating additional time in examination (special arrangements) 94
- deleting external 33
- deleting internal 19
- eligibility for special arrangements 92
- entering grades/marks for individual ... 66
- preparing marksheets for registration .. 51
- removing from component sitting........ 88
- seating in a specific seat 101
- seating individual 101
- selecting for component sitting 88
- selecting potential external for examinations 21
- selecting potential internal for examinations 3
- transferring from external to internal ... 33
- transferring from internal to external ... 19
- viewing commitments 103
- viewing for sitting 89
- viewing those selected for sitting 89
- viewing/editing external details 24
- viewing/editing internal details 13
- with special arrangements 92

changing
- column width 70
- display order 69
- marksheet orientation 71
- report orientation 71, 116

zoom factor ... 71, 116
checking
entries ... 80
clash status ... 102
clashes
dealing with ... 101
viewing potential ... 102
clearing
column contents ... 68
columns
alternating ... 99
changing width ... 70
clearing contents ... 68
restoring original order ... 68
restoring saved values ... 67
selecting default grade/mark ... 62
viewing properties ... 68
commitments
for candidate, viewing ... 103
completing and reviewing marksheets ... 62
component sitting integrity check ... 143
components
removing candidates from sitting ... 88
selecting candidates for sitting ... 88
selecting to seat ... 86
contents of column
clearing ... 68
copying
marksheet data ... 68
coursework marks
submitting ... 81
creating
batch marksheets ... 59
exam numbers ... 4
external candidates ... 21
internal candidates ... 11
marksheets and templates ... 52
marksheets using existing templates ... 57
notes for marksheet row ... 69
omr sheets and templates ... 38
omr sheets using existing templates ... 43
seating plan ... 98
UCI numbers ... 9
csv file
importing into excel ... 117

D

data
copying/pasting marksheet ... 68
exporting marksheet ... 71
de-activating
seats ... 97
dealing with clashes ... 101
default
selecting grade/mark for a column ... 62
deleting
column contents ... 68
external candidates ... 33
external results with QN ... 112
internal candidates ... 19
marksheets ... 72
display order
changing ... 69
duplicate omr sheets ... 37

E

EDI folders
tidying ... 83
editing
examination results ... 109
external candidate details ... 24
external candidate entry ... 30
forecast entry for external candidate ... 30
forecast entry for internal candidate ... 16
internal candidate details ... 13
internal candidate entry ... 16
results entered via the omr ... 50
seating plan ... 98
elements
selecting for entry ... 16, 30
enrolment status ... 16
entering

examination results 109
grades/marks for individual candidates 66

entries
adding/editing/viewing external candidate 30
adding/editing/viewing internal candidate 16
checking 80
reports.. 121
submitting 80
viewing/editing forecast for external candidates 30
viewing/editing forecast for internal candidates 16

exam numbers
generating.. 4

examination numbers
generating.. 4
understanding.................................. 3

examination results
exporting 117
manually entering and editing 109

examinations
assigning additional time for candidates with special arrangements 94
selecting potential external candidates 21
selecting potential internal candidates 3
tidying numbers 5

Excel
importing csv file........................... 117

existing commitments
for candidate, viewing 103

exporting
marksheets 70, 71
reports overview 117

external candidates
adding 21
deleting 33
transferring to internal 33
viewing/editing details....................... 24

external results with QN
deleting... 112
entering manually 109
searching for students 109
viewing or editing 112

F

flags
setting qualifier 15, 29

forecast
submitting grades 75

forecast entries
viewing/editing for external candidates 30
viewing/editing for internal candidates 16

forecast grades
submitting 81

G

generating
exam numbers 4
examination numbers 4
seating plan 98
the UCI 9
UCI... 9
UCI numbers...................................... 9

grades
entering for individual candidates........ 66
submitting forecast 81

I

importing
csv file into Excel 117

individual candidates
entering grades/marks 66
seating.. 101
seating in a specific seat 101

integrity check
component sitting 143

internal candidates

adding ... 11
deleting ... 19
transferring to external ... 19
viewing/editing details ... 13

M

marking omr sheets ... 37
marks
entering for individual candidates ... 66
submitting coursework ... 81
marksheets
adding notes for row ... 69
batch creation ... 59
changing orientation ... 71
completing and reviewing ... 62
copying/pasting data ... 68
creating ... 52
creating using existing templates ... 57
deleting ... 72
exporting ... 71
introduction ... 52
preparing for candidate registration ... 51
previewing and exporting ... 70
printing ... 71
zooming in/out ... 71, 116

N

notes
adding to marksheet row ... 69
numbers
tidying examination ... 5

O

offset
omr printer setup ... 149
omr
black line test ... 148
duplicate sheets ... 37
editing results ... 50
equipment and stationery suppliers ... 148
how it works ... 147
marking sheets ... 37
red line test ... 148
setting up ... 148
sheet numbers ... 37
sheets ... 36
templates ... 36
white line test ... 148
omr reading
unable to handshake with OMR error ... 152
omr setup
baud rate ... 151
data bits ... 150
discrimination setting ... 151
parity ... 150
port ... 150
port settings ... 150
print sheet number ... 149
printer offset ... 149
printing ... 149
scaling ... 149
sensitivity setting ... 151
stop bits ... 150
test omr port ... 151
omr sheets
creating ... 38
creating using existing templates ... 43
reading ... 49
omr usage ... 35
order
changing display ... 69
restoring original column ... 68
orientation
changing in reports ... 71, 116
changing marksheet ... 71

P

pasting
marksheet data ... 68
port
omr setup ... 150
port settings
omr setup ... 150

potential clashes 102
potential external candidates
  selecting for examinations 21
potential internal candidates
  selecting for examinations 3
preparing marksheets for candidate registration..................................... 51
previewing
  marksheets 70
print sheet number
  omr setup 149
printer offset
  omr setup 149
printing
  marksheets 71
  omr setup 149
  reports overview 116
producing
  reports... 115
properties
  viewing column 68

Q

qualifier flags
  setting 15, 29

R

reading
  omr sheets 49
red line test
  omr 148
registration
  preparing marksheets for candidates... 51
removing
  candidates from component sitting...... 88
  external candidates 33
  internal candidates 19
  marksheets 72
reports
  candidate 132
  changing orientation 71, 116
  entries 121
  printing 116
  producing 115
  seating organiser 133
  viewing 116
  zooming in/out 71
restoring
  original column order 68
  saved column values 67
result date.. 38
result history 38
result sets 38
results
  editing those entered via the omr........ 50
  manually entering and editing 109
reviewing
  marksheets...................................... 62
running
  component sitting integrity check...... 143

S

saved column values
  restoring 67
scaling
  omr setup...................................... 149
seating
  candidates with special arrangements.. 92
  individual candidate in specific seat ... 101
  selecting a component........................ 86
seating individual candidates............... 101
seating organiser
  reports... 133
  seating candidate with special arrangements................................ 92
  unit seating wizard.......................... 104
seating plan
  editing 98
  generating 98
seats
  activating and de-activating 97
  seating candidates in specific............ 101
selecting

candidates for component sitting 88
component to seat 86
default grade/mark for a column......... 62
elements for entry 16, 30
potential external candidates for examinations 21
potential internal candidates for examinations 3
submission file type 80
setting
qualifier flags 15, 29
setting up
omr 148
settings
port, omr setup 150
sheet number
printing, omr setup 149
sheet numbers
omr 37
sheets
creating omr 38, 43
duplicate omr.................................. 37
marking omr................................... 37
omr 36
reading omr.................................... 49
sitting
removing candidates from component 88
selecting candidates for component..... 88
special arrangements
allocating additional time to a candidate 94
making candidate eligible for............. 92
seating a candidate.......................... 92
submission file
selecting type 80
submitting
amendments................................... 82
coursework marks 81
entries 80
forecast grades 81
suppliers
omr equipment and stationery 148

T

templates
creating....................................38, 52
creating marksheets using existing.43, 57
introduction 52
omr 36
tests
seating unit 104
tidying
EDI folders 83
examination numbers 5
transferring
candidate status external to internal.... 33
candidate status internal to external.... 19

U

UCI numbers
generating 9
understanding 9
understanding
examination numbers 3
the UCI 9
unit seating wizard
seating unit tests 104
unit tests
seating... 104

V

values
restoring saved column 67
viewing
candidates selected for sitting 89
column properties............................. 68
existing commitments for candidate .. 103
external candidate details 24
external candidate entry 30
external results with QN 112
forecast entry for external candidate ... 30
forecast entry for internal candidate 16
internal candidate details 13

internal candidate entry 16
potential clashes 102
reports... 116
seat booking.................................. 100

W

what are aspects? 52
what are marksheets?.......................... 52
what are templates?............................ 52
white line test
omr... 148
width
changing for column 70

Z

zoom
in/out of marksheets......................... 71
in/out of reports........................ 71, 116