



PULSE

last updated for the Autumn 2020 release

Handbook

CAPITA

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01 | Document Change Control

Date	Release	Description
Sep 2020		<p>Importing Data Against a UDF</p> <p>The User Defined Field Data Map enables the import of data to UDFs for Person Details and Student Details entity types ONLY.</p> <p>See Mapping Data Groups on page 25.</p>

02 | Introduction to PULSE

Overview

Pupil Level data for School Effectiveness (PULSE) enables the Local Authority to work with schools to analyse and evaluate the progress of individual pupils and groups of pupils. Using PULSE, Local Authorities can manage, analyse and share statutory and local attainment targets.

PULSE enables the LA to import and analyse data from a variety of sources including:

- SIMS Assessment Manager.
- .csv and .tsv files from existing LA systems.
- QCA data.
- NFER data.
- DfE data.

PULSE uses aspects to define the criteria for measuring performance. Aspects enable student results to be recorded against both national and locally defined assessments.

B2B attainment functionality enables Local Authorities to transfer attainment information between SIMS in schools and One in the Local Authority. For more information, please refer to the *B2B: Student* handbook, available on the One Publications website.

Using this Handbook

This handbook is intended for PULSE users at the Local Authority.

The first chapter provides an overview of PULSE.

The second chapter covers creating users and assigning permissions.

The third chapter describes how aspects are used to define the criteria for measuring performance.

The fourth chapter covers managing data including importing data, exporting data to schools and other LAs and managing marksheets and templates.

The fifth chapter covers the analysis and reporting functionality in PULSE.

The sixth chapter explains how to manage school census and attainment data.

03 | Managing Users

Introduction

Creating a PULSE user is a two stage process.

Firstly, if they do not already exist, a One Administrator must create the user in the One v4 Client via **Tools | Administration | User Management | User Accounts** with a user name and unique email address.

Secondly, the user must be assigned to the correct security group in the v4 Client. Permissions are assigned to a security group in the v4 Client via **Tools | Permissions | User Group Processes**.

More Information: *Managing Users in v4* chapter in the *One System – Managing Users, Groups & Permissions* handbook available on the One Publications website (www.onepublications.com).

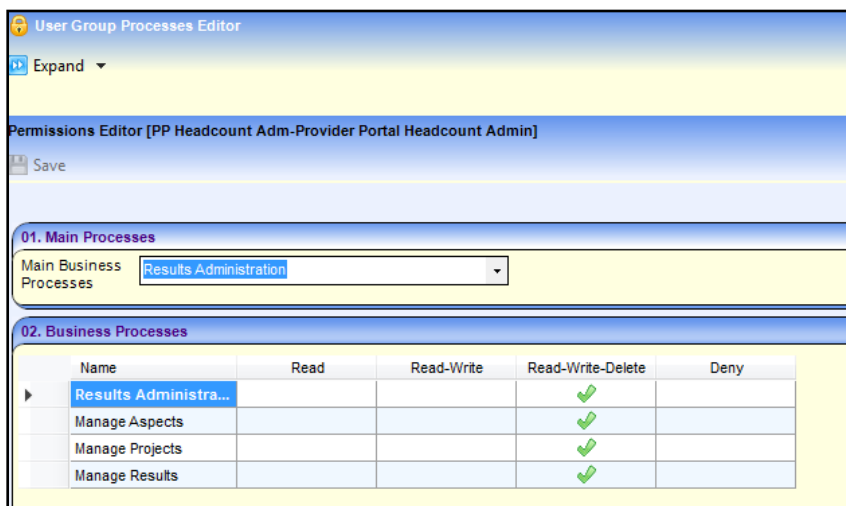
Assigning Permissions

Permission to access business processes are assigned to a user group in the v4 Client via **Tools | Permissions | User Group Processes**.

Permission to Manage Aspects and Results

To manage aspects, the permission required is **Read-Write-Delete** for the business process **Manage Aspects** under the **Results Administration** main business process.

To manage results, the permission required is **Read-Write-Delete** for the business process **Manage Results** under the **Results Administration** main business process.



Permission to Import Results Data

Permissions are required to import results data.

The user must be a member of a group with the permissions displayed in the following image. In the v4 permissions area, select **Data Importing** from the **Main Business Process** drop-down to display the **Business Processes** panel. At a minimum, the group must have **Read-Write** permissions for the **Results** and **Student Details** business processes.

Managing Users

01. Main Processes				
Main Business Processes	Data Importing			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
▶ Data Importing				
CTF Importing				
Early Years Enquiries				
ISPP Details				
Results				
School Census				
Service Providers				
Student Details				
UDF Values				

04 | Managing Aspects and Gradesets

Overview

Aspects are used to define the criteria for measuring performance. They enable student results to be recorded against both national and locally defined assessments.

An aspect must have at least one gradeset assigned to it. A gradeset identifies the valid values (grades or marks) for an aspect at a particular point in time.

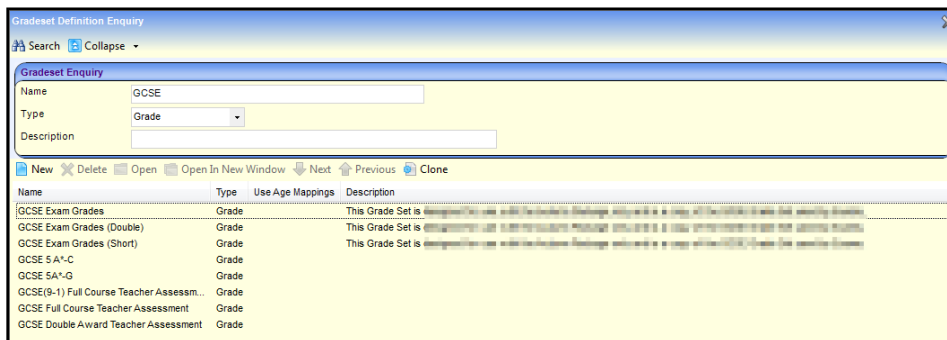
Managing Gradesets

A gradeset identifies the valid values (grades or marks) for an aspect at a particular point in time.

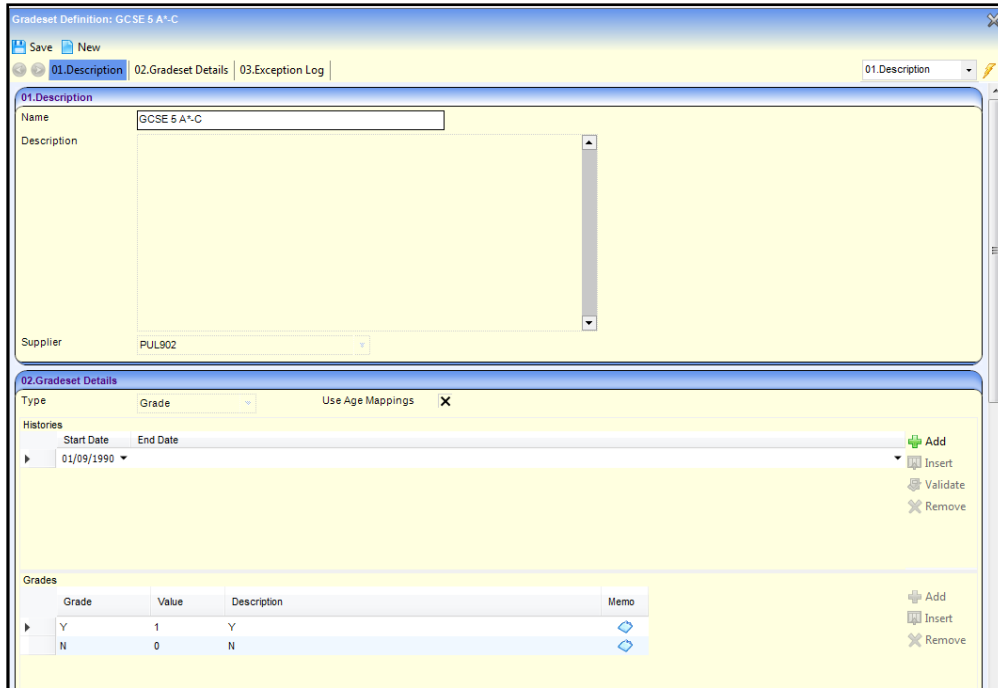
An aspect must have a gradeset assigned to it.

Viewing Gradesets

1. Select **Focus | Aspects Management | Gradesets** to display the **Gradeset Definition Enquiry** page.
2. If required, enter search criteria.
3. Click the **Search** button to display a list of matching gradesets.



4. Select the required gradeset and click the **Open In New Window** button.

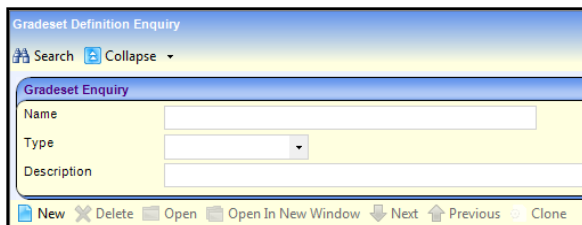


Defining a New Gradeset

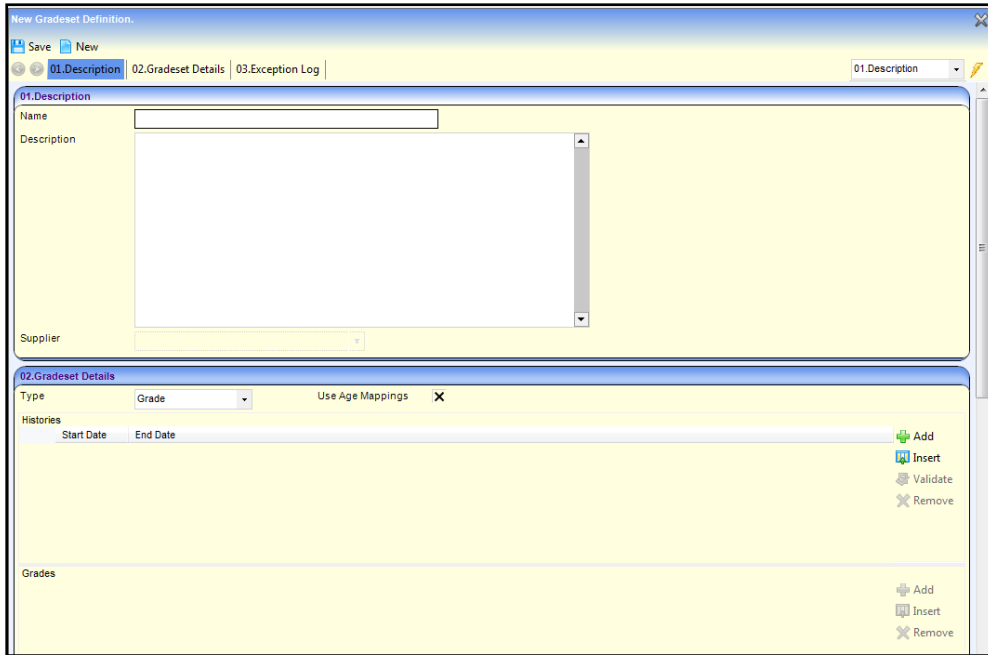
A new gradeset can be defined or cloned from an existing gradeset.

To define a new gradeset:

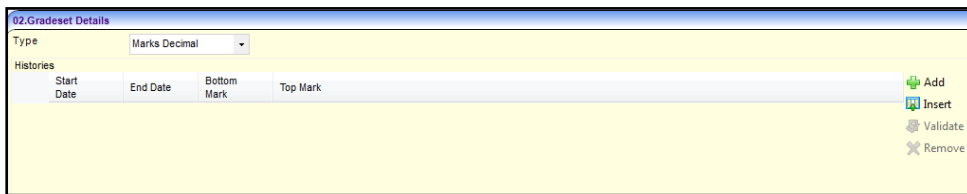
1. Select **Focus | Aspects Management | Gradesets** to display the **Gradeset Definition Enquiry** page.



2. Click the **New** button to display the **New Gradeset Definition** page.



3. Enter a **Name** and **Description**.
4. Select a **Type** from the drop-down list.

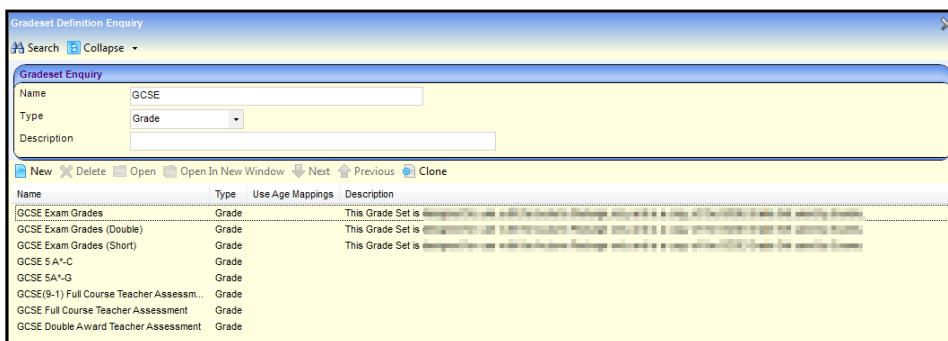


5. Click the **Add** button.
6. Select a **Start Date**.
7. Enter mark or grade details.
8. Click the **Save** button.

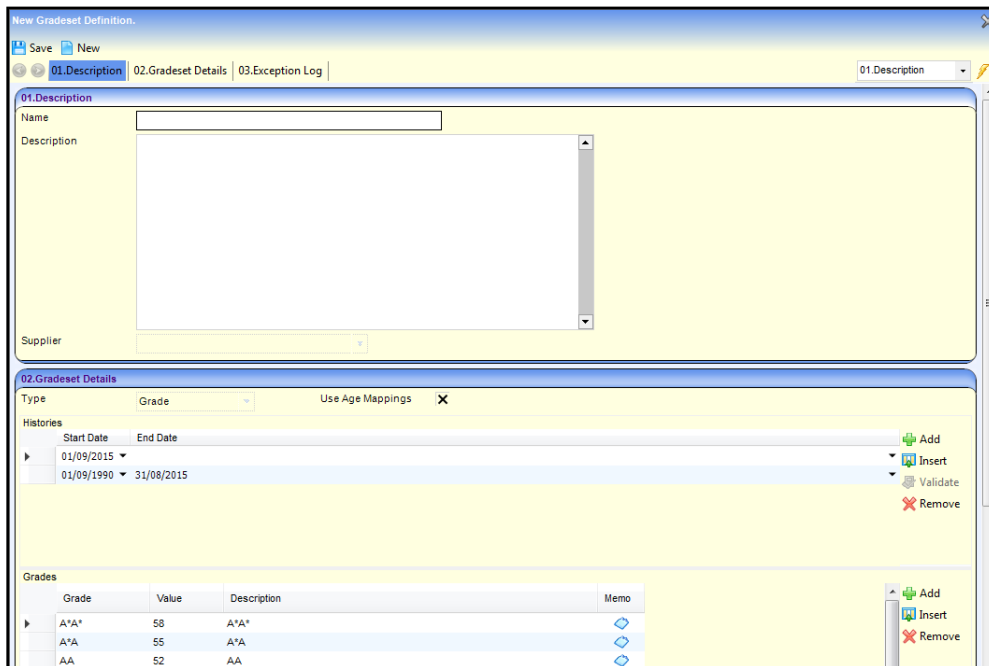
Cloning a Gradeset

A new gradeset can be cloned from an existing one.

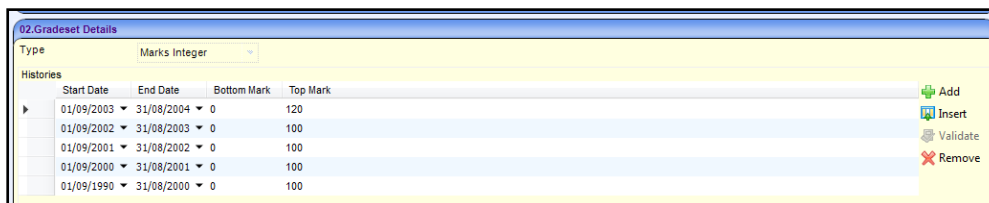
1. Select **Focus | Aspects Management | Gradesets** to display the **Gradeset Definition Enquiry** page.
2. If required, enter search criteria.
3. Click the **Search** button to display a list of matching gradesets.



4. Highlight the required gradeset and click the **Clone** button to display the **New Gradeset Definition** page with the cloned details. If the **Type** is **Grade**, the **Grades** are displayed on the **Gradeset Details** panel as shown in the following graphic:



If the **Type** is **Marks Integer** or **Marks Decimal**, the marks are displayed on the **Gradeset Details** panel as shown in the following graphic:



5. Enter a **Name** and **Description** for the new gradeset.
6. If required, update the **Histories** details on the **Gradeset Details** panel.

To add a new gradeset history record to the beginning of the list:

- a. Click the **Add** button on the **Histories** list.
- b. Enter the gradeset history details.
- c. Click the **Save** button.

To insert a new history record above the one selected:

- a. Click the **Insert** button.
- b. Enter the gradeset history details.
- c. Click the **Save** button.

To remove a history record:

- a. Highlight the record.
- b. Click the **Remove** button.
- c. Click the **Yes** button to confirm.
- d. Click the **Save** button.

7. If the **Type** is **Grade**, the list of **Grades** can be updated as follows:
 - To add a new grade to the end of the list, click the **Add** button and enter the details.
 - To insert a grade above the one selected, click the **Insert** button and enter the details.
 - To remove a grade, select it and click the **Remove** button.
8. Click the **Save** button.

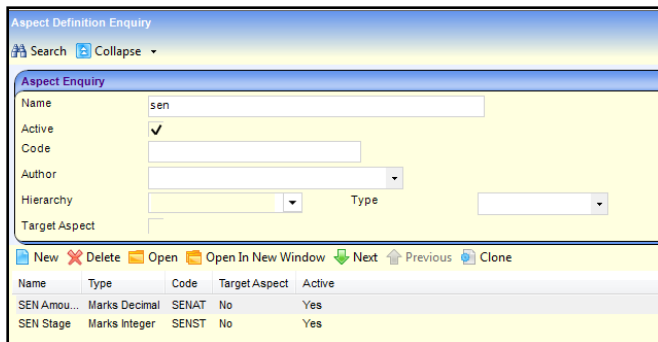
Managing Aspects

There are five types of aspect and the aspect type determines the details that are recorded for the gradeset associated with the aspect.

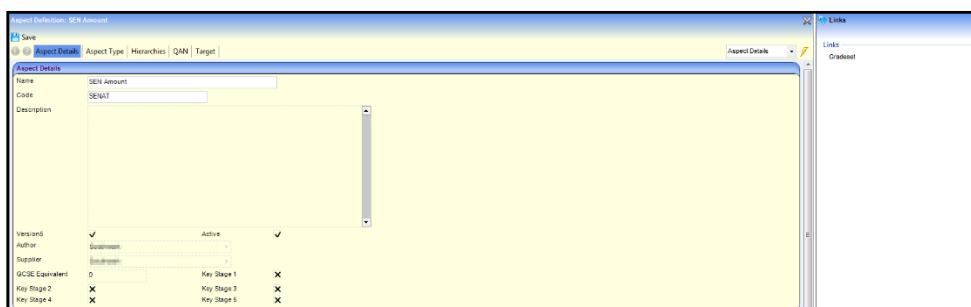
Aspect Type	Gradeset Details
Age	The lowest and highest reading age for the aspect.
Grade	A grade and associated value.
Marks Decimal	The lowest and highest marks in decimal format.
Marks Integer	The lowest and highest marks in whole number format.
Comment	No associated gradeset.

Viewing Aspects

1. Select **Focus | Aspect Management | Aspects** to display the **Aspect Definition Enquiry** page.
2. Enter search criteria and click the **Search** button to display a list of matching aspects.



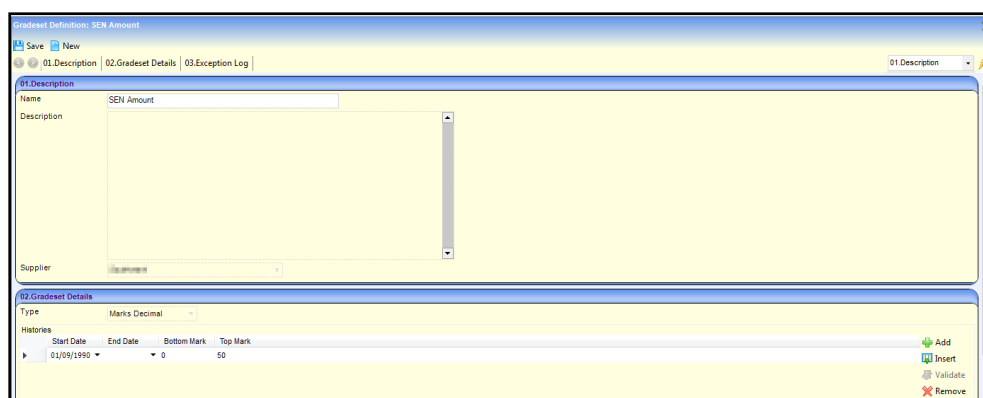
3. Select the required aspect and click the **Open In New Window** button to display the **Aspect Definition** page.



A link to the gradeset details is displayed on the **Links** panel.

4. If required, click the **Gradeset** link to display the **Gradeset Definition** page.

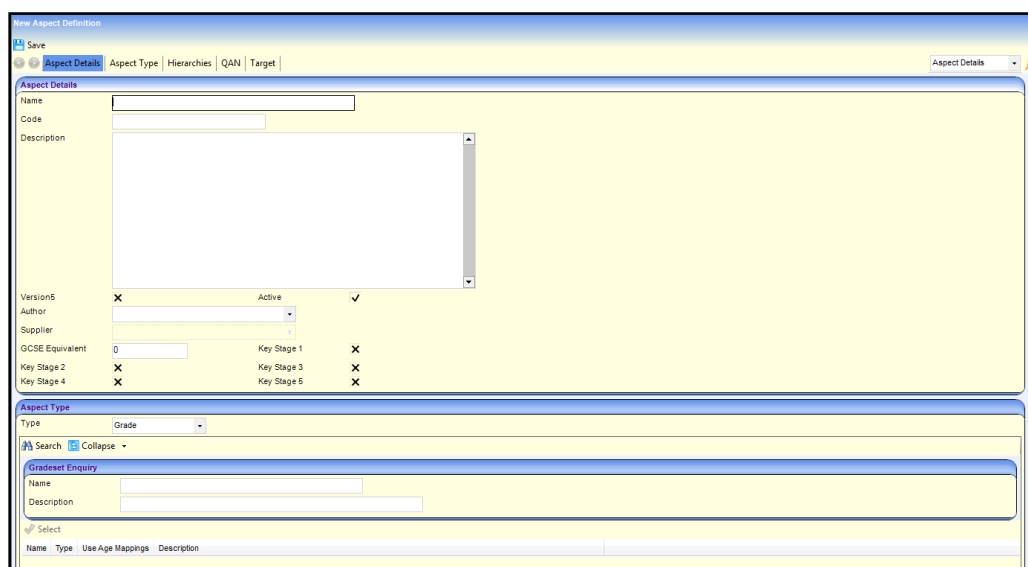
Managing Aspects and Gradesets



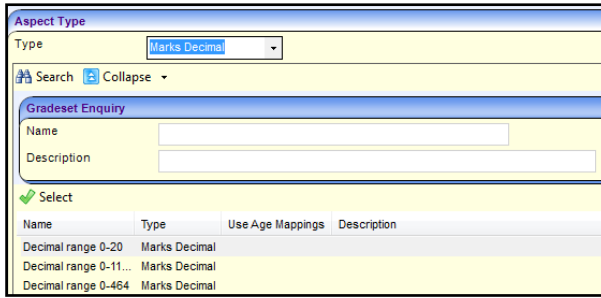
The **Gradeset Details** panel displays the valid values (grades or marks) at a specific date.

Defining a New Aspect

1. Select **Focus | Aspect Management | Aspects** to display the **Aspect Definition Enquiry** page.
2. Click the **New** button to display the **New Aspect Definition** page.

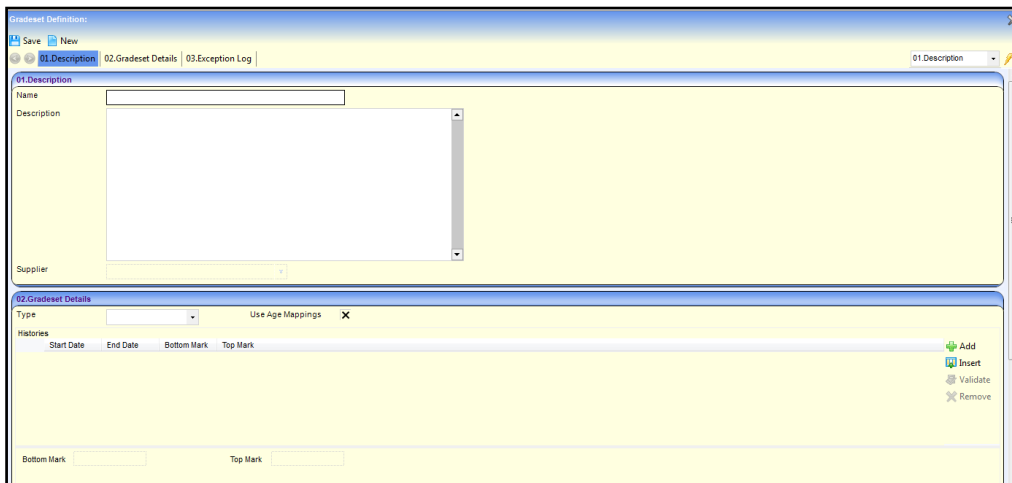


3. Enter a **Name** and a **Code**.
4. If required, enter a **Description**.
5. Select an **Author** from the drop-down list.
6. **Supplier** is automatically completed to display the origin of the aspect.
7. If required, enter a **GCSE Equivalent** grade.
8. If required, select a check box to identify a key stage to which this aspect applies.
9. To select a gradeset for the aspect:
 - a. Select a **Type** from the drop-down list.
 - b. Click the **Search** button.



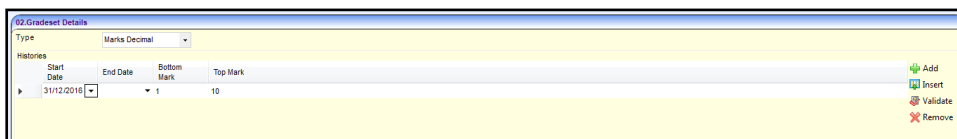
c. Highlight the required gradeset and click the **Select** button.

Alternatively, define a new gradeset for the aspect via the **Gradeset** link in the **Links** panel. For more information, see [Defining a New Gradeset](#) on page 8.



10. On the **Gradeset Details** panel enter the following information:

- a. Select a **Type** from the drop-down list.
- b. Click the **Add** button.
- c. Select a **Start Date**.
- d. Enter mark or grade details.



11. Click the **Save** button.

Defining Grades and Age Mapping Bands for Better Start

Grades used in Better Start assessments are defined in the One v4 Client using PULSE.

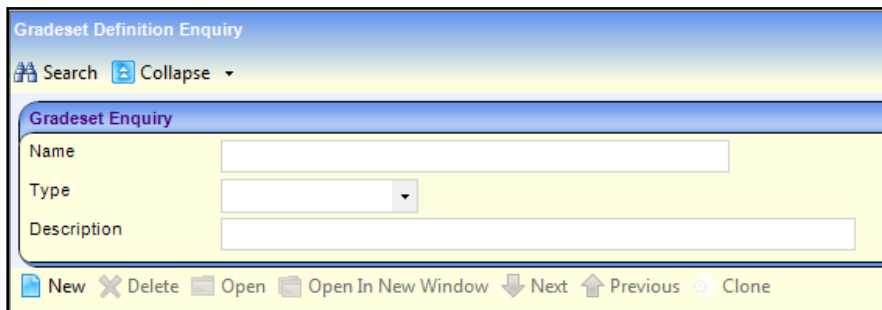
The Local Authority can update gradesets and define age mapping bands to produce reports to identify which children need support in particular areas.

For more information about the One Better Start Assessment portal, please refer to the *One Early Years Better Start Provider Portal* handbook on the One Publications website.

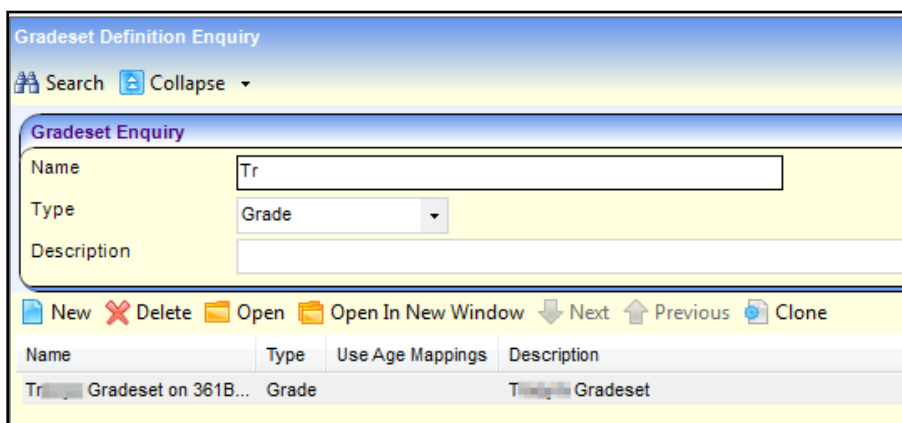
Adding a Memo for a Grade

A memo can be added to provide a long text description against a grade. This enables providers to produce reports for parents that describe the grade that their child has achieved.

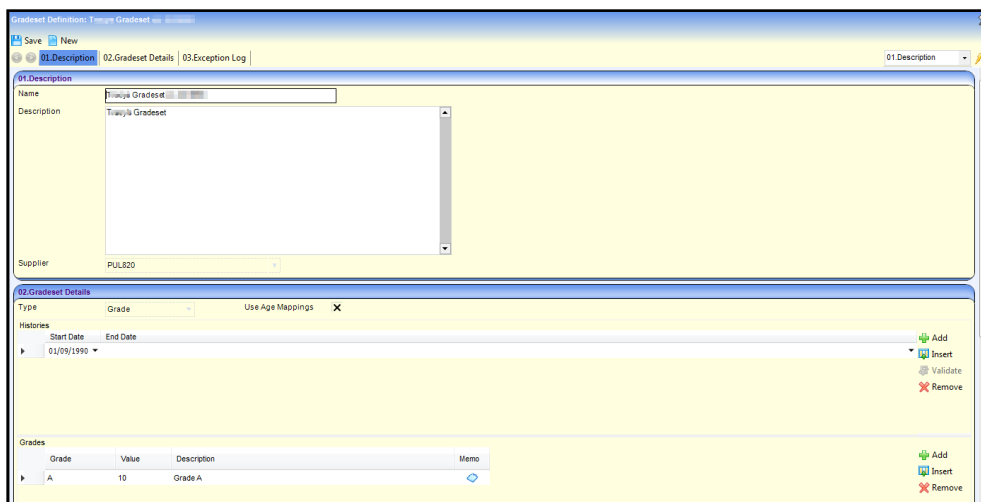
1. Select **Focus | Aspects Management | GradeSets** to display the **Gradeset Definition Enquiry** page.



2. Enter the required search criteria and click the **Search** button to display a list of matching gradesets.



3. Select the required gradeset and click the **Open In New Window** button to display the **Gradeset Definition** page.



4. Click the **Memo** icon adjacent to the required grade in the **Gradeset Details** panel to display the **Memo** dialog.
5. Record the required details and click the **OK** button.

Mapping Grades to Bands

Children can be placed into bands based on their age at the assessment date when they were given a particular grade. Once children are categorised, reports can be produced to help to identify children who need support in certain areas.

The Local Authority needs to define the age range for each band for a particular grade, by selecting an age mapping code.

Selecting an Age Mapping Code

1. Select **Focus | Aspects Management | GradeSets** to display the **Gradeset Definition Enquiry** page.

The screenshot shows the 'Gradeset Definition Enquiry' interface. It includes a search bar with a magnifying glass icon and a 'Collapse' button. The main area contains a form with three input fields: 'Name', 'Type', and 'Description'. Below the form is a toolbar with buttons for 'New', 'Delete', 'Open', 'Open In New Window', 'Next', 'Previous', and 'Clone'.

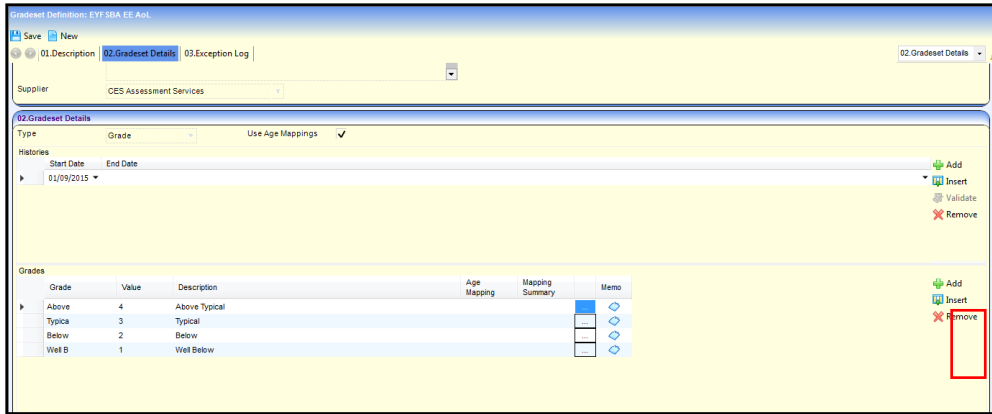
2. Enter the required search criteria and click the **Search** button to display a list of matching gradesets.
3. Select the required gradeset and click the **Open In New Window** button to display the **Gradeset Definition** page.

The screenshot displays the 'Gradeset Definition' page for 'EYFSA EE AOL'. The 'Supplier' is listed as 'CES Assessment Services'. The '02.Gradeset Details' section shows the 'Use Age Mappings' checkbox is checked. Below this, there is a table of grades:

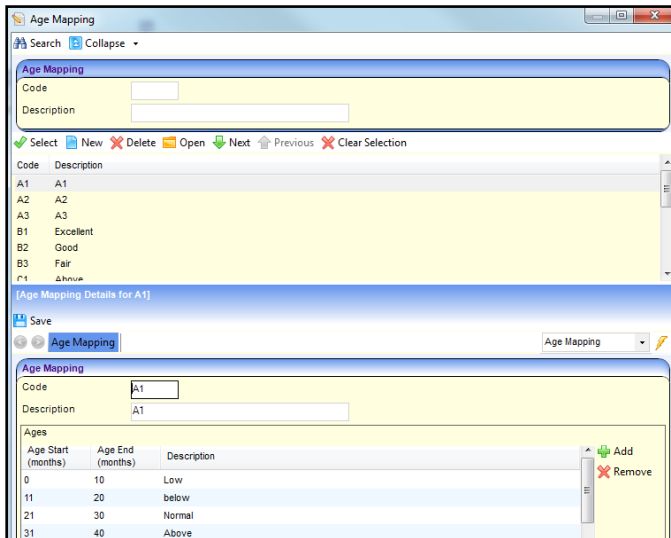
Grade	Value	Description	Memo
Above	4	Above Typical	
Typical	3	Typical	
Below	2	Below	
Well B	1	Well Below	

4. Select the **Use Age Mappings** check box to display a tick. The age mapping fields are displayed.

Managing Aspects and Gradesets

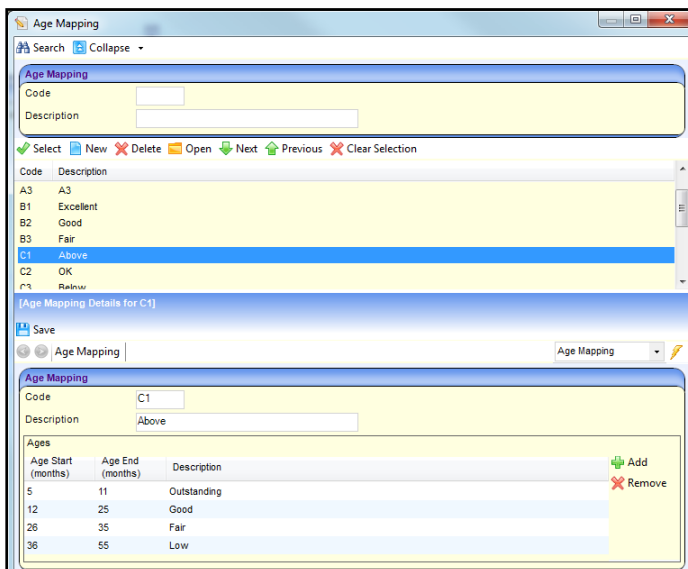


- Click the button adjacent to the required grade to display the **Age Mapping** dialog.



- If required, enter search criteria and click the **Search** button.
- Highlight the required **Code** and click the **Open** button to display the **Age Mapping Details** for the code.

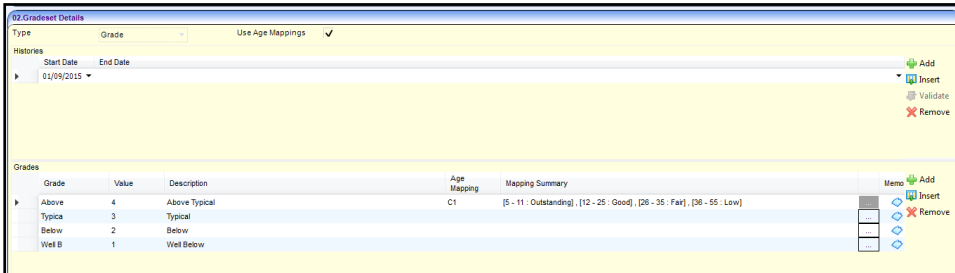
Alternatively, click the **New** button to create a new code. For more information, see [Creating a New Age Mapping Code](#) on page 17.



8. If required, update the age ranges for the code:
 - a. Click the **Add** button to add a new age range or click the **Remove** button to remove an age range.

NOTE: Age ranges cannot overlap.

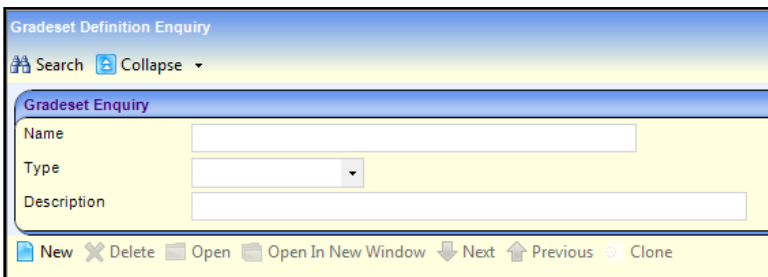
- b. Click the **Save** button.
9. Click the **Select** button.



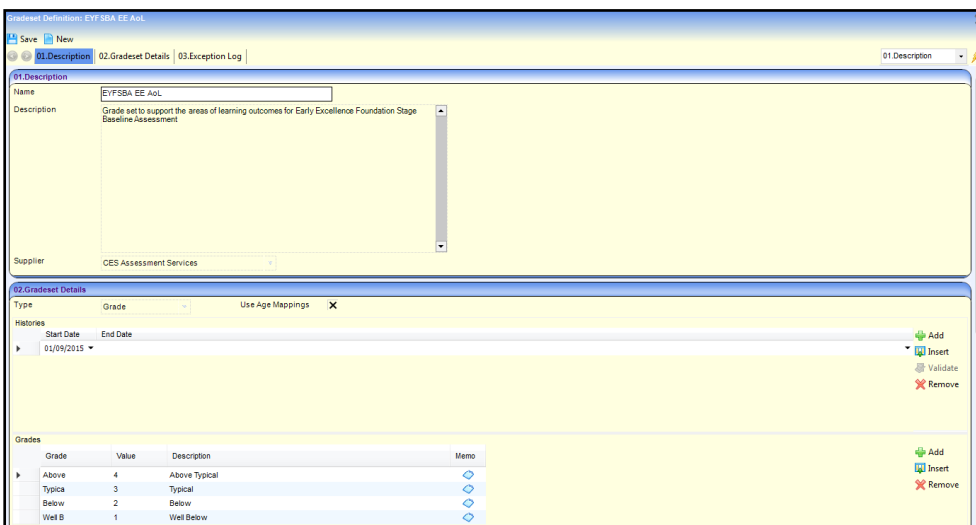
10. Click the **Save** button.

Creating a New Age Mapping Code

1. Select **Focus | Aspects Management | Gradesets** to display the **Gradeset Definition Enquiry** page.

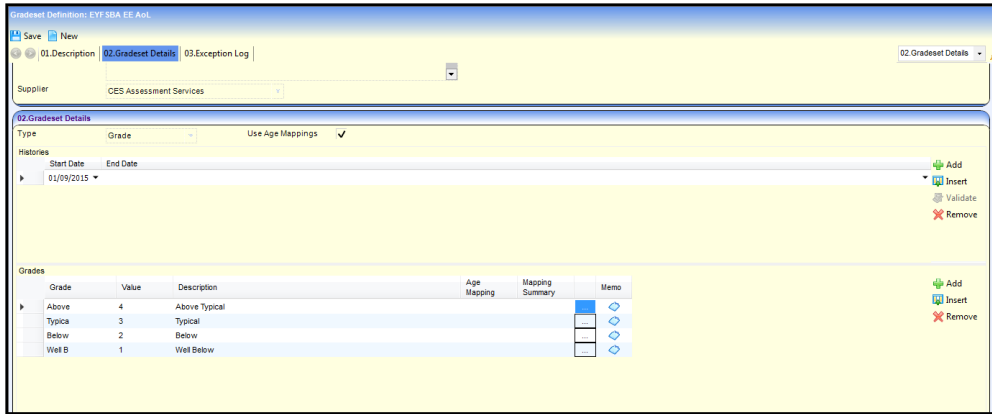


2. Enter the required search criteria and click the **Search** button to display a list of matching gradesets.
3. Select the required gradeset and click the **Open In New Window** button to display the **Gradeset Definition** page.

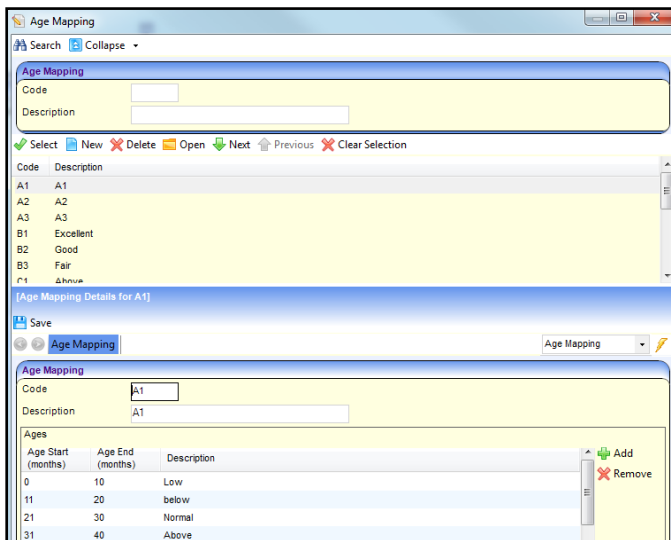


4. Select the **Use Age Mappings** check box to display a tick.

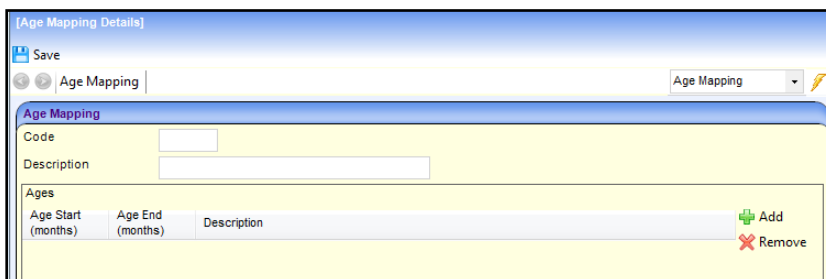
Managing Aspects and Gradesets



- Click the button adjacent to the required grade to display the **Age Mapping Details**.



- Click the **New** button.



- Enter a **Code** and **Description**.
- Enter one or more age ranges with descriptions:
 - Click the **Add** button.
 - Enter an **Age Start (months)** and **Age End (months)** and a **Description**.

NOTE: Age ranges cannot overlap.

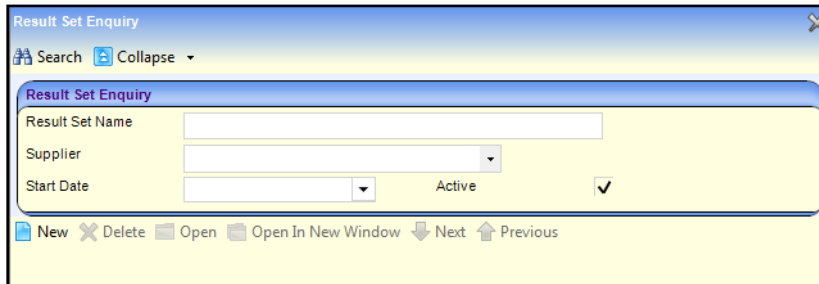
- Click the **Save** button.

Managing Result Sets

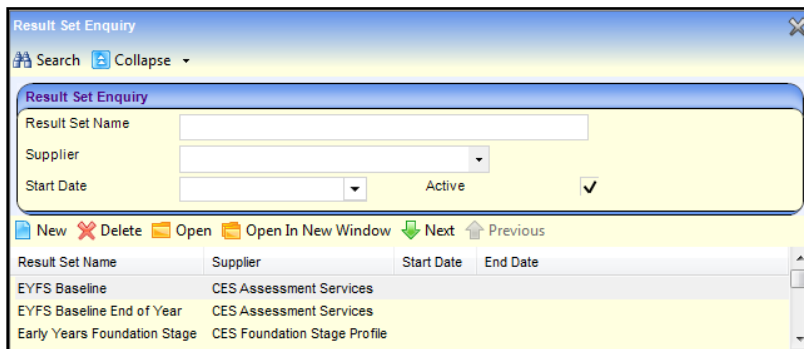
A result set groups aspects and results together to enable bulk import or export and analysis.

Viewing Result Sets

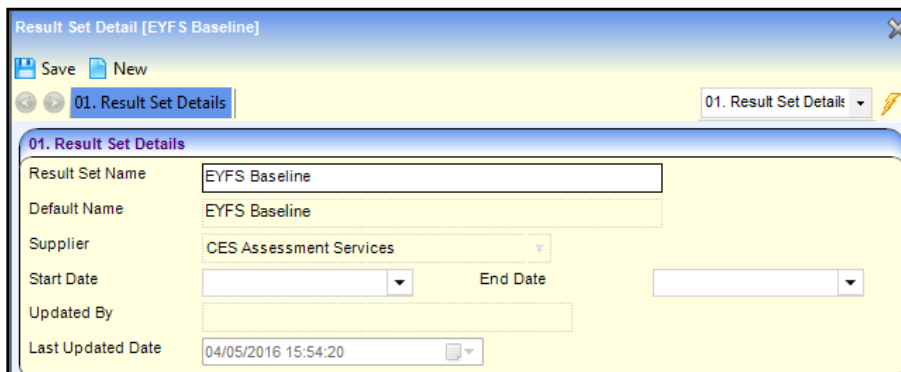
1. Select **Focus | Aspects Management | Result Sets** to display the **Result Set Definition Enquiry** page.



2. If required, enter search criteria.
3. Click the **Search** button to display a list of matching result sets.



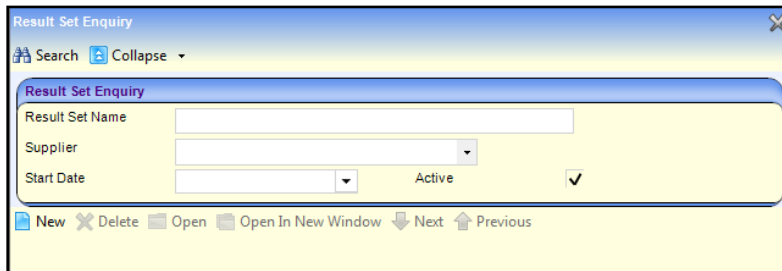
4. Highlight the required record and click the **Open In New Window** button to display the **Result Set Detail** page.



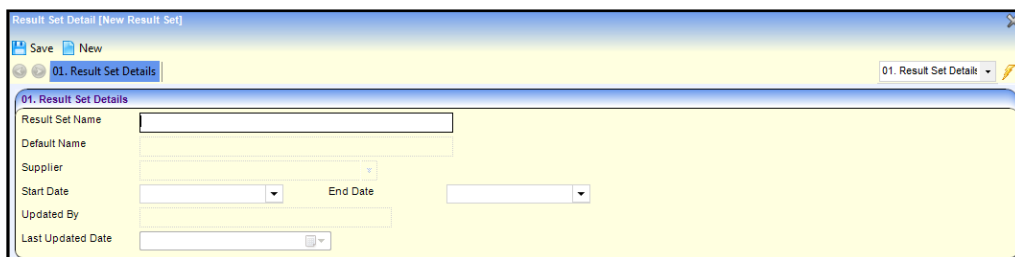
Defining a New Result Set

To define a new result set:

1. Select **Focus | Aspects Management | Result Sets** to display the **Result Set Enquiry** page.



2. Click the **New** button to display the **Result Set Detail** page.

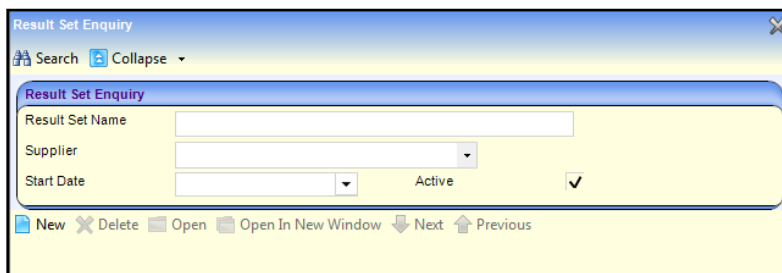


3. Enter a **Result Set Name**.
4. Select a **Start Date**.
5. If required, select an **End Date**.
6. Click the **Save** button.

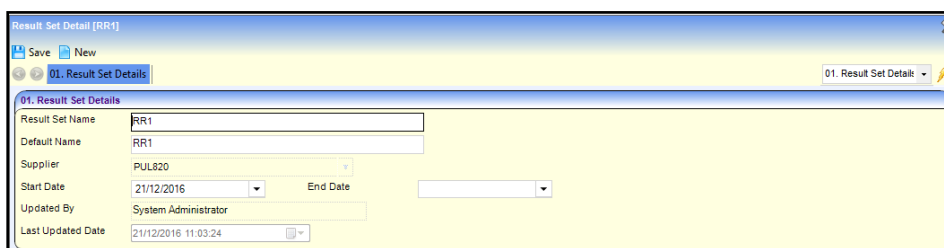
Updating a Result Set

The result set can be updated.

1. Select **Focus | Aspects Management | Result Sets** to display the **Result Set Enquiry** page.



2. If required, enter search criteria and click the **Search** button to display a list of results.
3. Highlight the required result set and click the **Open In New Window** button to display the **Result Set Detail** page.



4. If required, select a **Start Date** or **End Date**.

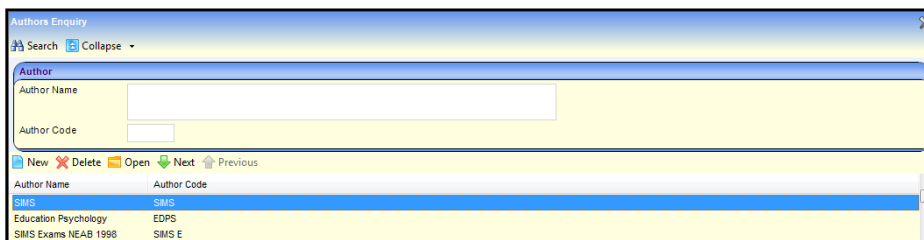
5. If required, select a **Default Name**.
6. Click the **Save** button.

Managing Authors

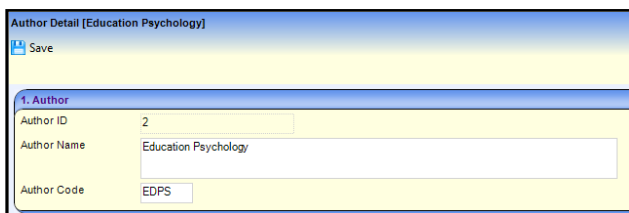
The author is the person who defines an aspect. When a new aspect is defined, the author is selected from a drop-down list.

Viewing an Author

1. Select **Focus | Aspect Management | Authors** to display the **Authors Enquiry** page.
2. Enter search criteria and click the **Search** button to display a list of matching authors.

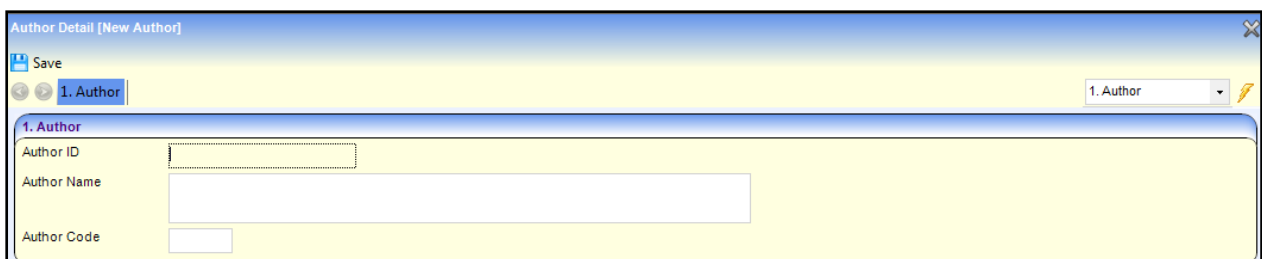


3. Select the required record and click the **Open** button to display the **Author Detail** panel beneath the list.



Adding a New Author

1. Select **Focus | Aspect Management | Authors** to display the **Authors Enquiry** page.
2. Click the **New** button to display the **Author Detail (New Author)** page.



3. Enter an **Author Name** and **Author Code**.
4. Click the **Save** button.
The **Author ID** is automatically completed.

Updating an Author

1. View the required author record. For more information, see [Viewing an Author](#) on page 21.
2. Make the required changes to the **Author Name** or **Author Code**.
3. Click the **Save** button.

05 | Managing Data

Importing Data

The **Import Data** menu option is used to import various types of data including gradesets, marksets, aspects, results, targets and templates.

Import File Specification

In order to import data, an import file specification must be specified. This can either be done using the autogenerate functionality or using the function buttons provided.

Import file specifications identify the mapping of the containers and data elements in an XML file with the tables in One.

Once the file specification has been set up, it can be used each time a file of this type is imported.

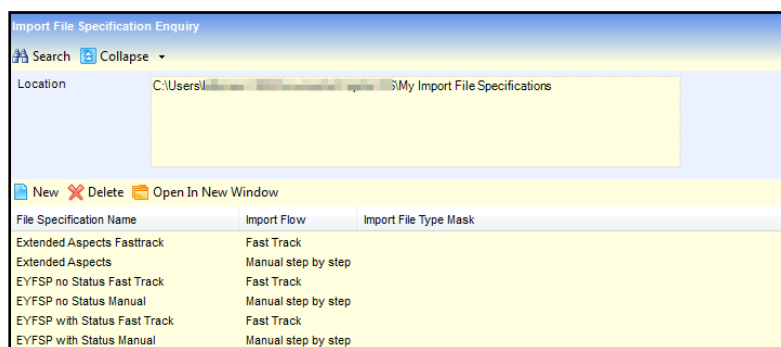
More Information: *Data Management-Import File Specifications* reference guide available on the One Publications website (www.onepublications.com).

Autogenerating a File Structure

The autogenerate functionality creates a new file structure based on an existing sample data file.

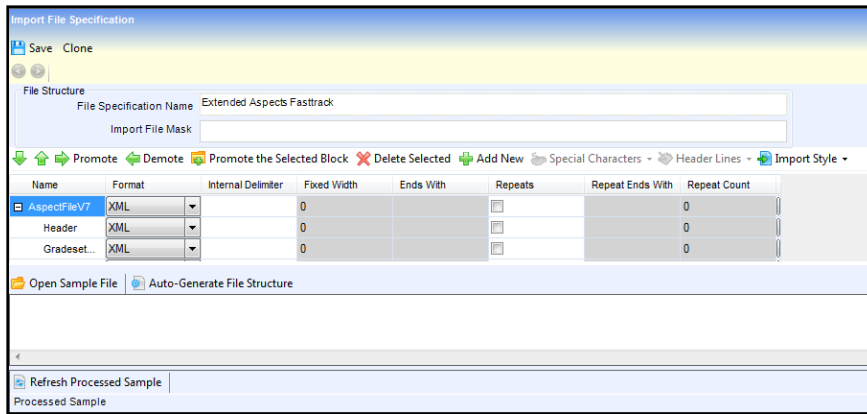
When autogenerating a file specification, you can use the translation facility to specify a text replacement for a field before the file is imported.

1. Select **Focus | Data Management | Import | Import File Specifications** to display the **Import File Specification Enquiry** page.

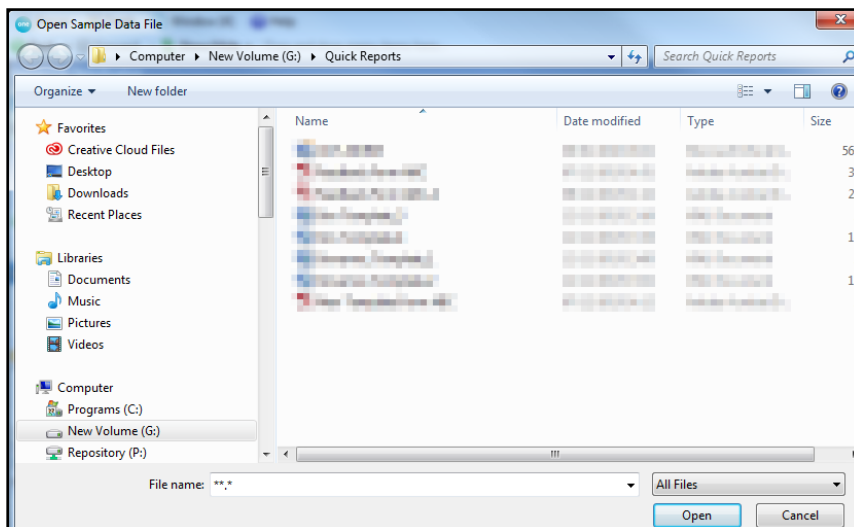


2. Select the required file in the list and click the **Open In New Window** button to display the **Import File Specification** page.

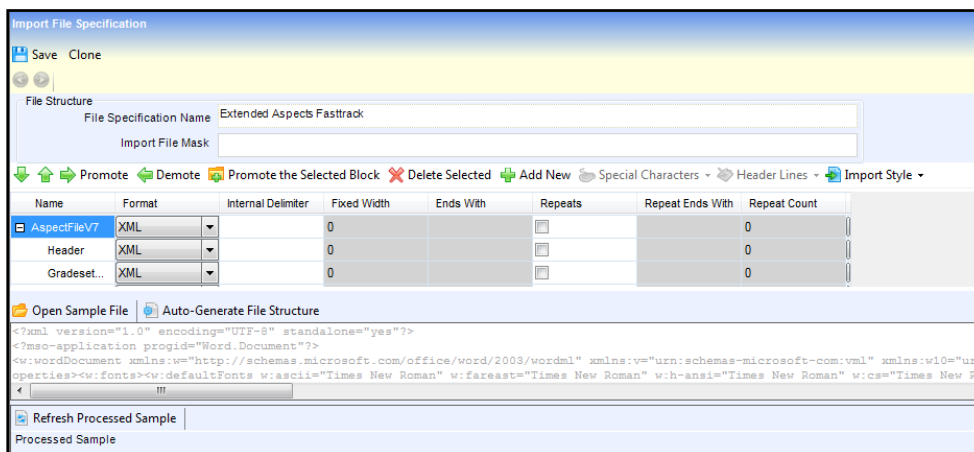
Managing Data



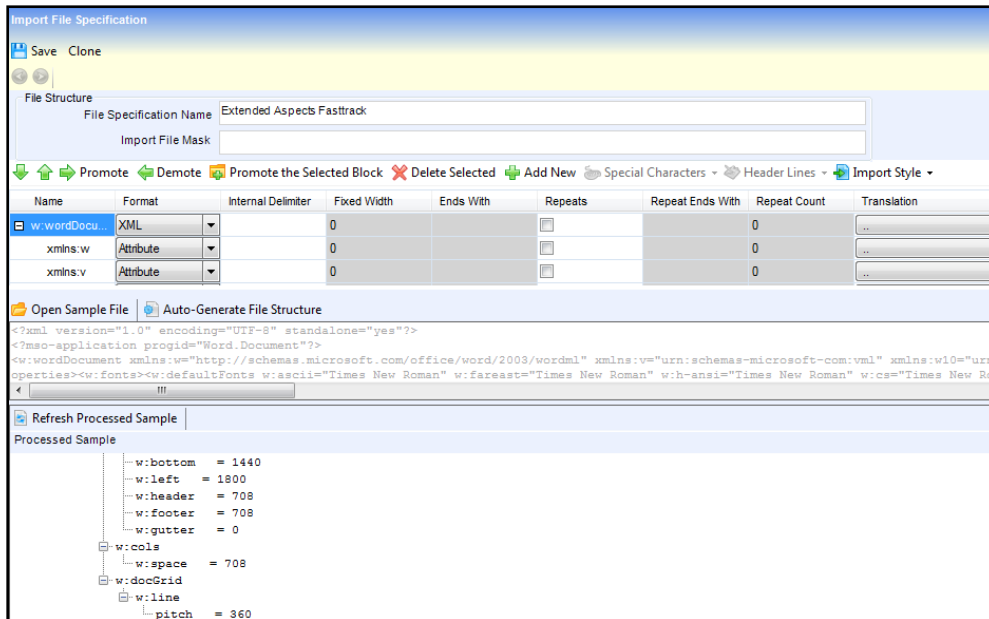
3. Click the **Open Sample File** button to display the **Open Sample Data File** file dialog.



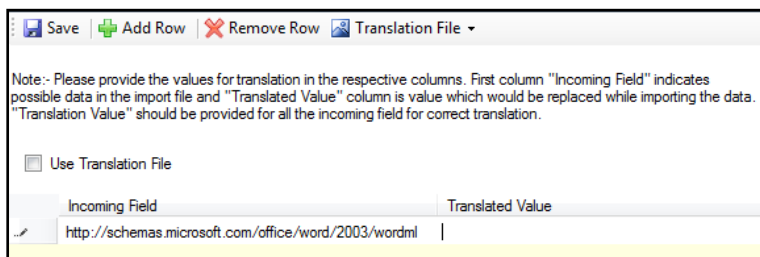
4. Select the required file to use as a sample and click the **Open** button.



5. Click the **Auto-Generate File Structure** button to generate the file structure and populate the file structure grid.



6. Enter a **File Specification Name**.
7. If required, click the **Translation** button adjacent to a field to display the translation dialog and specify a value for translation.



8. Enter a **Translated Value** and click the **Save** button.
9. Click the **Save** button to save the **Import File Specification**.

Mapping Data Groups

After the file has been set up, the data groups must be mapped to the database in order to import the data.

The data map controls the mapping between the the data fields in the file specification and the equivalent fields in the One database.

More Information: *Data Management-Import File Specifications* reference guide available on the One Publications website. (www.onepublications.com).

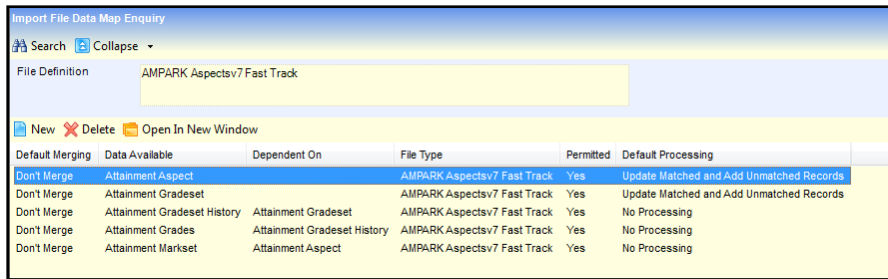
Viewing a Data Map

1. Select **Focus | Data Management | Import | Import File Specifications** to display the **Import File Specification Enquiry** page.

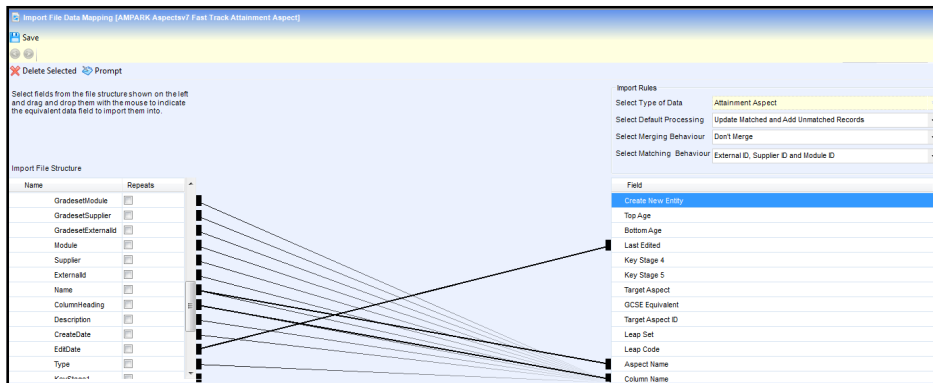


2. Select the required file specification in the list.
3. Click the **Data Maps** link in the **Links** panel to display the **Import File Data Map Enquiry** page.

Managing Data



4. Select a data map in the list and click the **Open In New Window** button to display the **Import File Data Mapping** page.



The data map displays a grid on the left showing the data fields in the file specification and the hierarchy. These are linked to the equivalent fields in the One database, shown on the right.

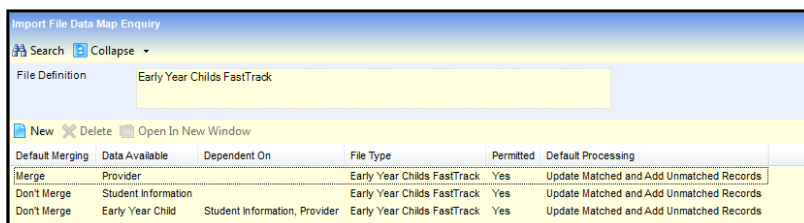
Creating a New Data Map

NOTE: This process must be completed by an experienced user who is familiar with the One database.

1. Select **Focus | Data Management | Import | Import File Specifications** to display the **Import File Specification Enquiry** page.



2. Select the required file specification in the list.
3. Click the **Data Maps** link in the **Links** panel to display the **Import File Data Map Enquiry** page.

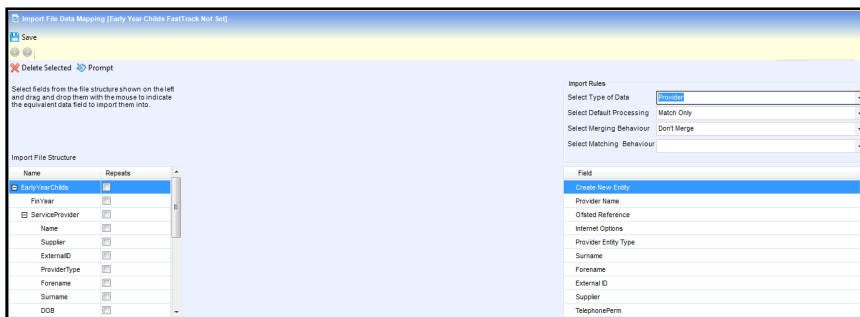


4. Click the **New** button to display the **Import File Data Mapping** page.



The data map displays a grid on the left showing the data fields in the file specification and the hierarchy.

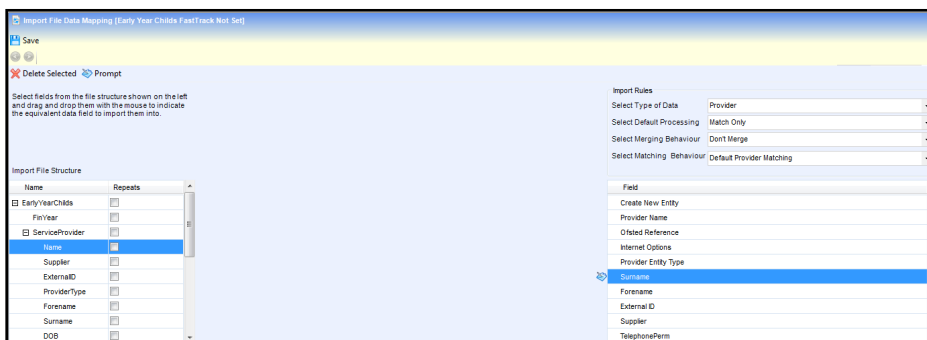
5. Select **Type of Data** from the drop-down list to display a list of fields from the One database on the right hand side of the grid.



6. Select the **Default Processing** option from the drop-down list.
7. Select the **Merging Behaviour** from the drop-down list.
8. If required, select **Matching Behaviour** from the drop-down list.

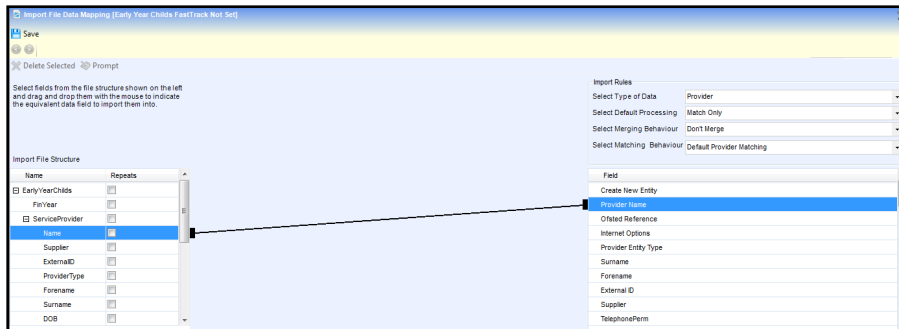
NOTES: Selecting a data item and clicking the **Prompt** button enables you to require the user to enter a value when data is imported.

9. If required, select a data item on the right-hand side of the grid and click the **Prompt** button to display the prompt icon next to the field.



10. Select a data field from the specification file structure on the left.
11. Using the mouse, drag and drop it to the equivalent One database field on the right.

Managing Data



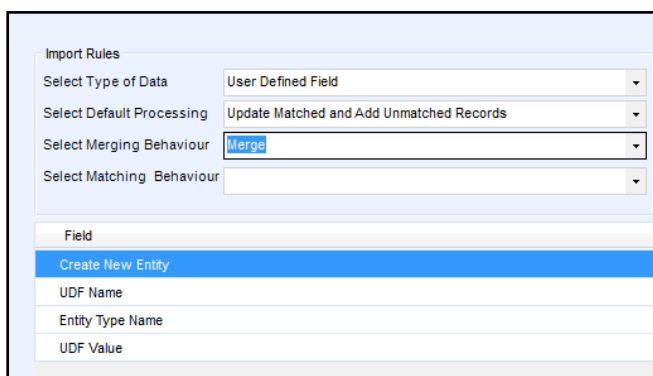
12. Click the **Save** button.

Importing Data against a UDF

The User Defined Field Data map enables the import of data to UDFs for Person Details and Student Details entity types **ONLY**.

- This data map must be used in conjunction with the student details data map.
- The Entity ID used for the UDF is the Student / Person ID associated with the matched student record
- UDF Name must be exactly the same as the UDF Field name (NOT Field Label)
- Entity Type Name can be either CCS.ENTITY.STUDENT for Student Details UDFs or CCS.ENTITY.PERSONDEFINITION FOR Person Details UDFs. **NB using any other Entity type name may cause unexpected results where the STUDENT_ID is equal to an existing ENTITY_ID of the type used.**
- UDF Value is the value to be added to the UDF.

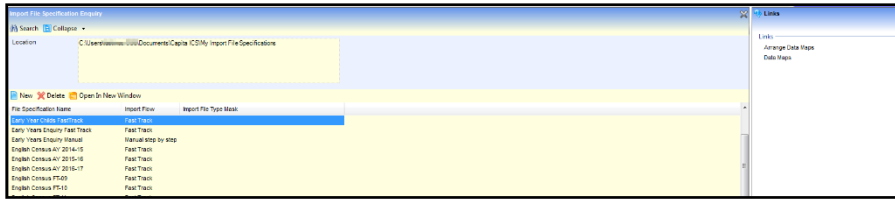
NOTE: When importing data against a UDF, you should ensure the UDF value is overwritten. To overwrite an existing value, select **Update Matched and Add Unmatched Records** from the **Select Default Processing** drop-down and select **Merge** from the **Select Merging Behaviour** drop-down as shown in the following graphic.



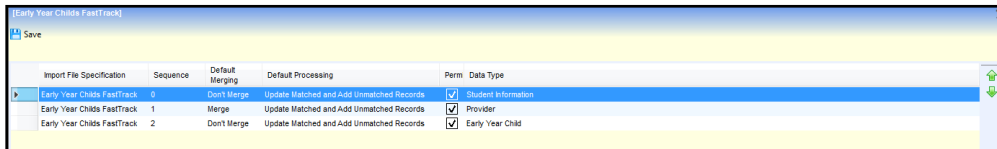
Arranging Data Maps

The **Arrange Data Maps** link enables you to define the order in which the data is imported.

1. Select **Focus | Data Management | Import | Import File Specifications** to display the **Import File Specification Enquiry** page.



2. Select the required file specification and click the **Arrange Data Maps** link to display the file specification showing the **Sequence** in which the data items are imported.



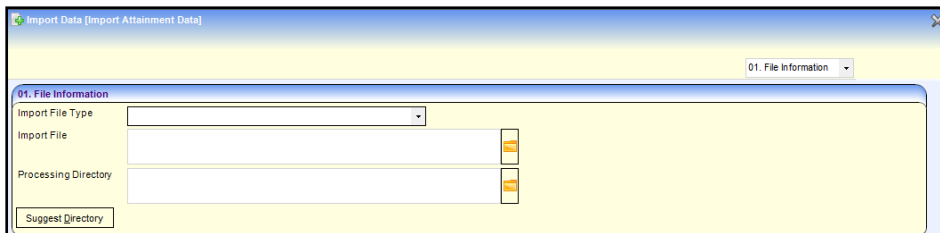
3. To change the order of the data items in the list, highlight a **Data Type** and click the up or down arrow.
4. Click the **Save** button.

Importing Attainment Data

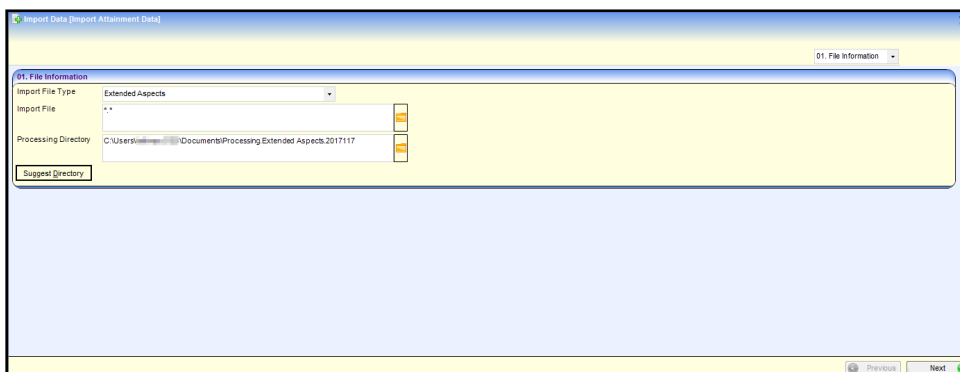
There are two methods of importing data, manual or fast track. The method used depends on the **Import File Type** selected.

Manual Step by Step Import

1. Select **Focus | Data Management | Import | Import Data** to display the **Import Data (Import Attainment Data)** page.

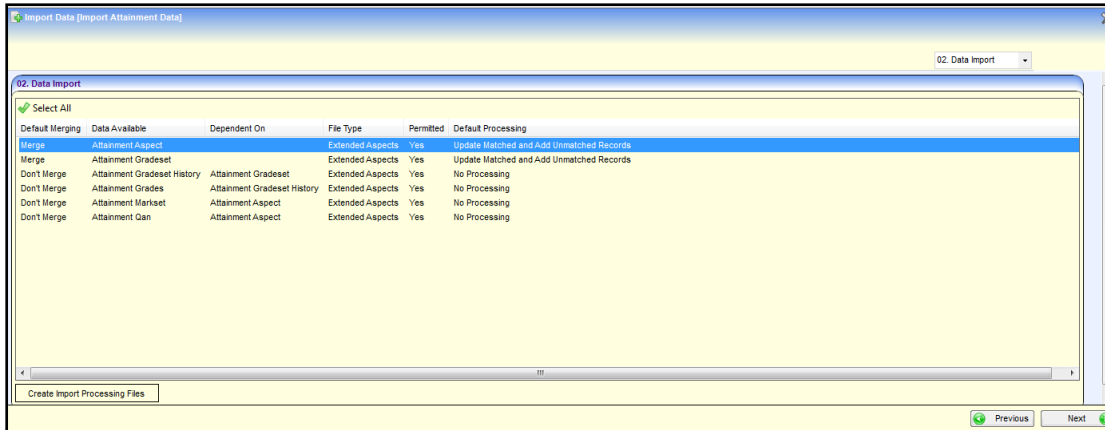


2. Select a manual **Import File Type** from the drop-down list.
3. Select an **Import File**.
4. Select a **Processing Directory** or click the **Suggest Directory** button to display the default directory.



5. Click the **Next** button to display the **Data Import** panel.

Managing Data



6. Select one or more data files or click the **Select All** button.
7. Click the **Create Import Processing Files** button to prepare the data for importing.

NOTE: If a data field in the import file has the prompt parameter set, a dialog is displayed to require a value to be entered.

8. Click the **Next** button to display the **Import Information** dialog with a set of tabs showing the current import status for each row of data: **Cannot be matched**, **Can be matched**, **Not matched** and **Matched**.

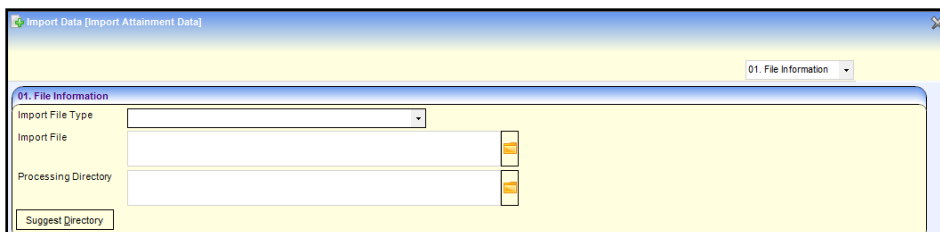
The tool bar at the top of each tab displays the following buttons: **Match**, **UnMatch**, **Compare**, **Store** or **Discard**. The buttons that are enabled depend on the type of data and its current status.

9. Click the required button for each row of data.
10. Close the dialog.

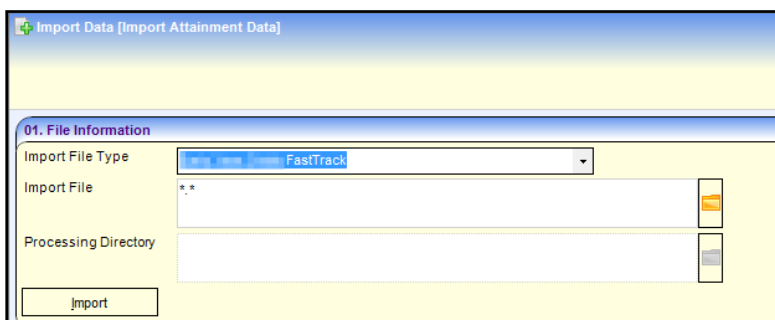
Fast Track Import

Fast track import is used to import data and update the One database.

1. Select **Focus | Data Management | Import | Import Data** to display the **Import Data (Import Attainment Data)** page.



2. Select a fast track **Import File Type** from the drop-down list.



3. Select an **Import File**.

- Click the **Import** button.

If a data field in the import file has the prompt parameter set, a dialog is displayed to enable a value to be entered.

- Enter a value.
- Click the **OK** button.

Exporting Data

Specific sets of data can be extracted and exported to schools or other Local Authorities. All export files are produced in XML format.

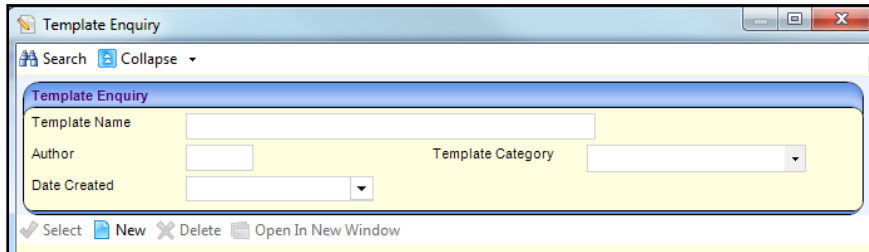
Exporting Aspects and Results Data

- Select **Focus | Data Management | Export | Aspects/Results Export** to display the **Export of Aspects/Results** page.

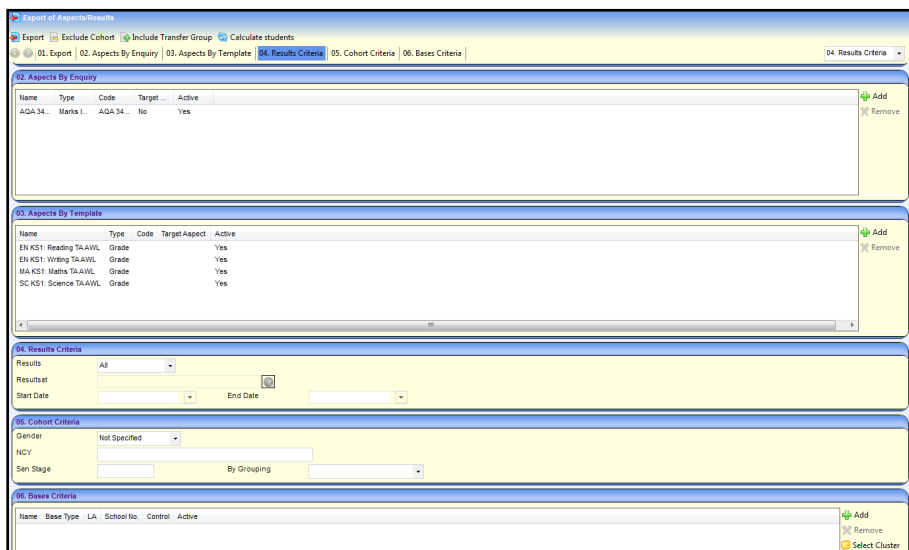
- Select the **Export Path**.
- If required, select the **Extended Aspect Details** check box to include details such as Key Stage 4 and 5 markers, QAN data and target information in the template export file.
- Click the **Add** button on the **Aspects by Enquiry** panel to display the **Aspect Definition Enquiry** dialog.

Managing Data

- If required, enter search criteria.
- Click the **Search** button to display a list of aspects.
- Select the required aspect and click the **Select** button.
- Click the **Add** button on the **Aspects by Template** panel to display the **Template Enquiry** dialog.

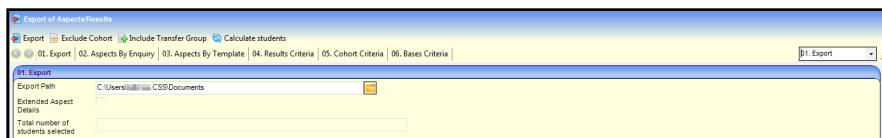


- If required, enter search criteria.
- Click the **Search** button to display a list of templates.
- Highlight the required template and click the **Select** button.
- If required, click the **Include Cohort** button to display the **Results Criteria**, **Cohort Criteria** and **Bases Criteria** panels to record specific information about the results that you want to export.

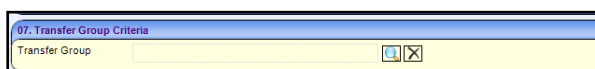


If **Include Cohort** is selected, the **Calculate Students** button is enabled.

- If required, click the **Calculate Students** button to display the **Total number of students selected** on the **Export** panel.



- If required, click the **Include Transfer Group** button to display the **Transfer Group Criteria** panel and select a **Transfer Group**.

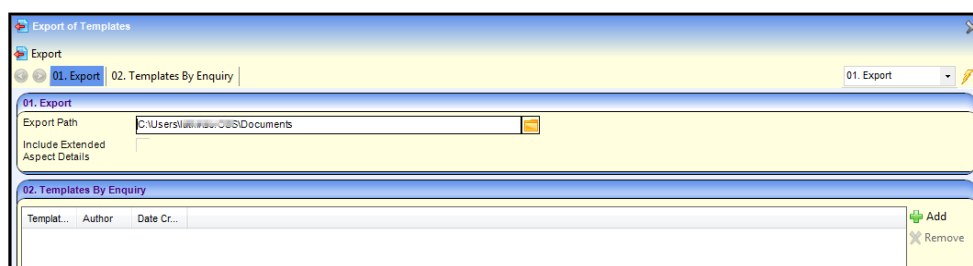


- Click the **Export** button to process the selected aspects and results and display the export information and list of processed XML export files.

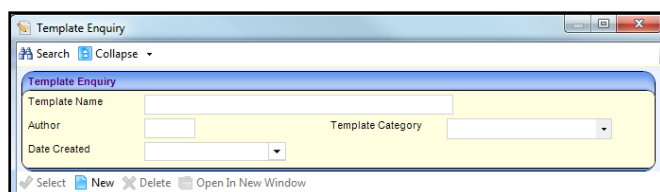
Exporting Data Files

To export any data file you must specify the export path and select at least one template. The export path determines where the exported file will be placed.

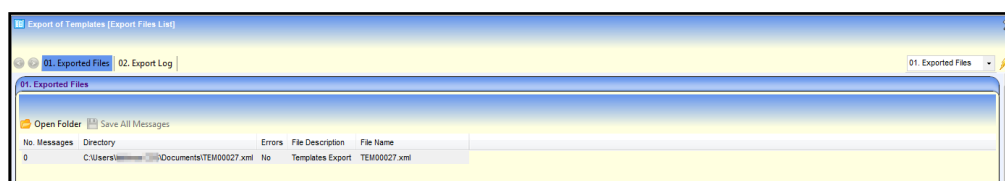
1. Select **Focus | Data Management | Export | Templates Export** to display the **Export of Templates** page.



2. Click the browse button to display the **Browse for Folder** dialog and select an **Export Path**.
3. If required, select the **Extended Aspect Details** check box to include details such as Key Stage 4 and 5 markers, QAN data and target information in the template export file.
4. Click the **Add** button on the **Templates By Enquiry** panel to open the **Template Enquiry** dialog.



5. If required, enter search criteria.
6. Click the **Search** button to display a list of templates.
7. Highlight the required template and click the **Select** button.
8. Click the **Export** button to export the file and display the **Export of Templates (Export Files List)** page.



The **Exported Files** panel lists the processed XML export files. The **Export Log** panel displays any errors for the selected export file.

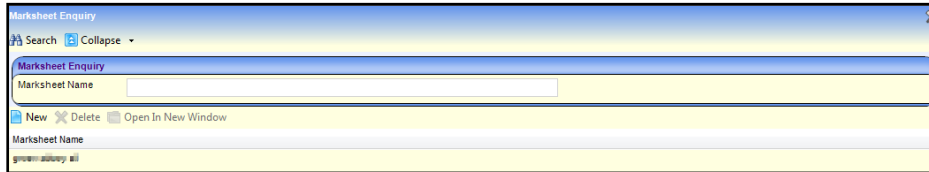
9. If required, click the **Save All Messages** button to save the error messages.

NOTE: The **File Name** is generated using a 3 character identifier for the type of export and a sequential export number. E.g. ASP (Aspect), RES (Results), TEM (Templates).

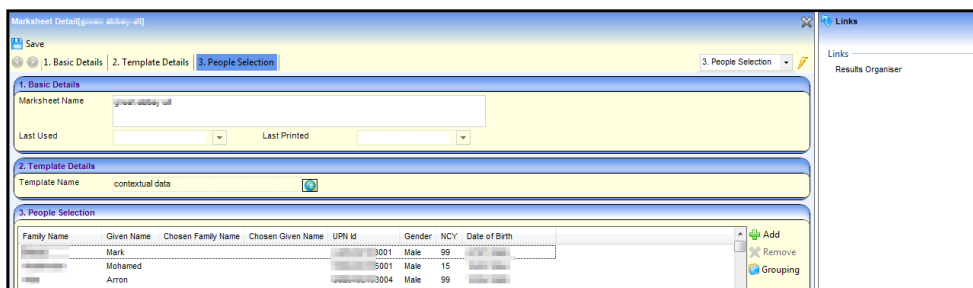
Managing Marksheets

Viewing a Marksheet

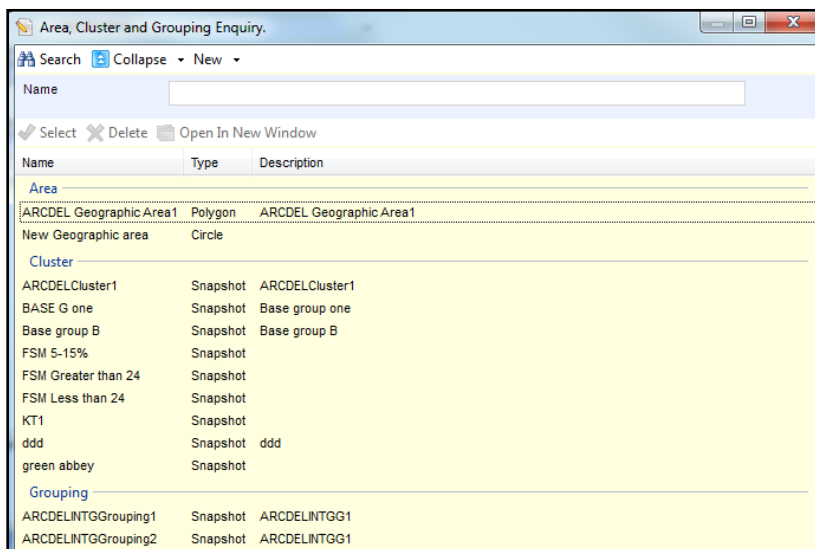
1. Select **Focus | Data Management | Marksheets** to display the **Marksheet Enquiry** page.
2. Click the **Search** button to display a list of marksheets.



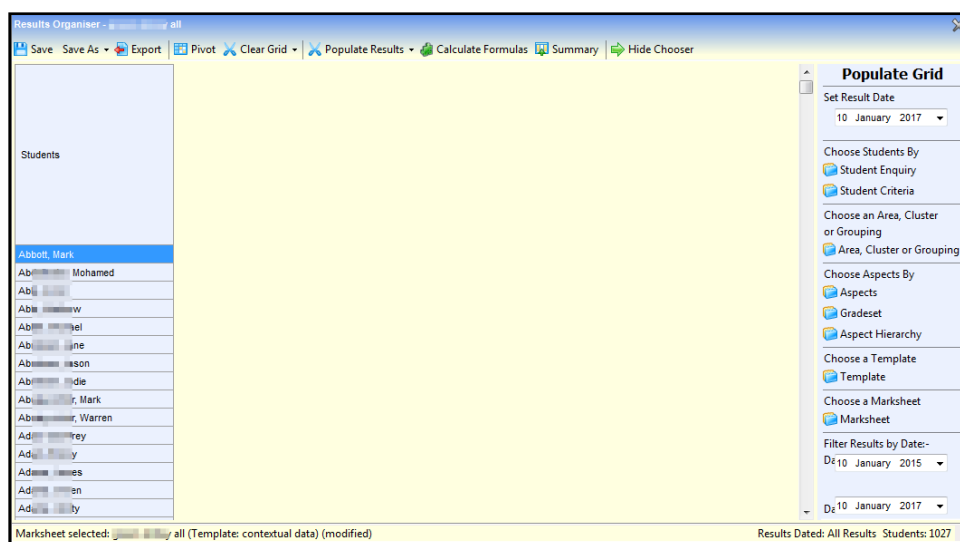
3. Select the required record and click the **Open In New Window** button to display the **Marksheet Detail** page.



4. If required, click the **Grouping** button to display the **Area, Cluster and Grouping Enquiry** dialog.



5. If required, click the **Results Organiser** link to display the **Results Organiser** page.



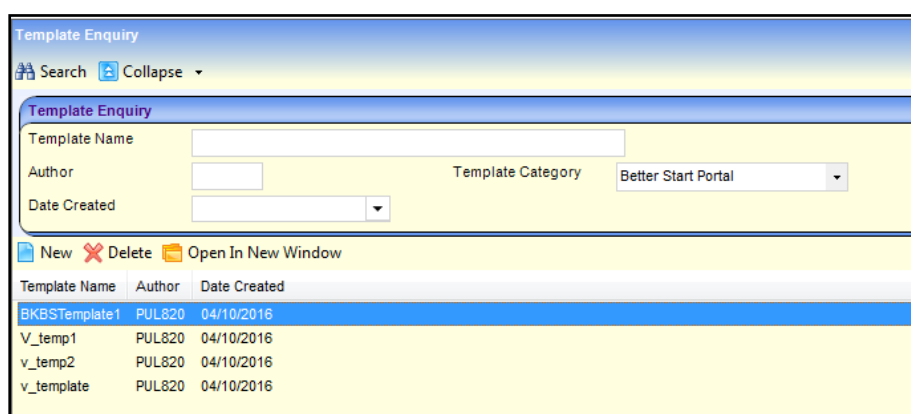
Managing Templates

Templates are used to define a set of columns to be used in marksheets. The columns are either aspects or a formula.

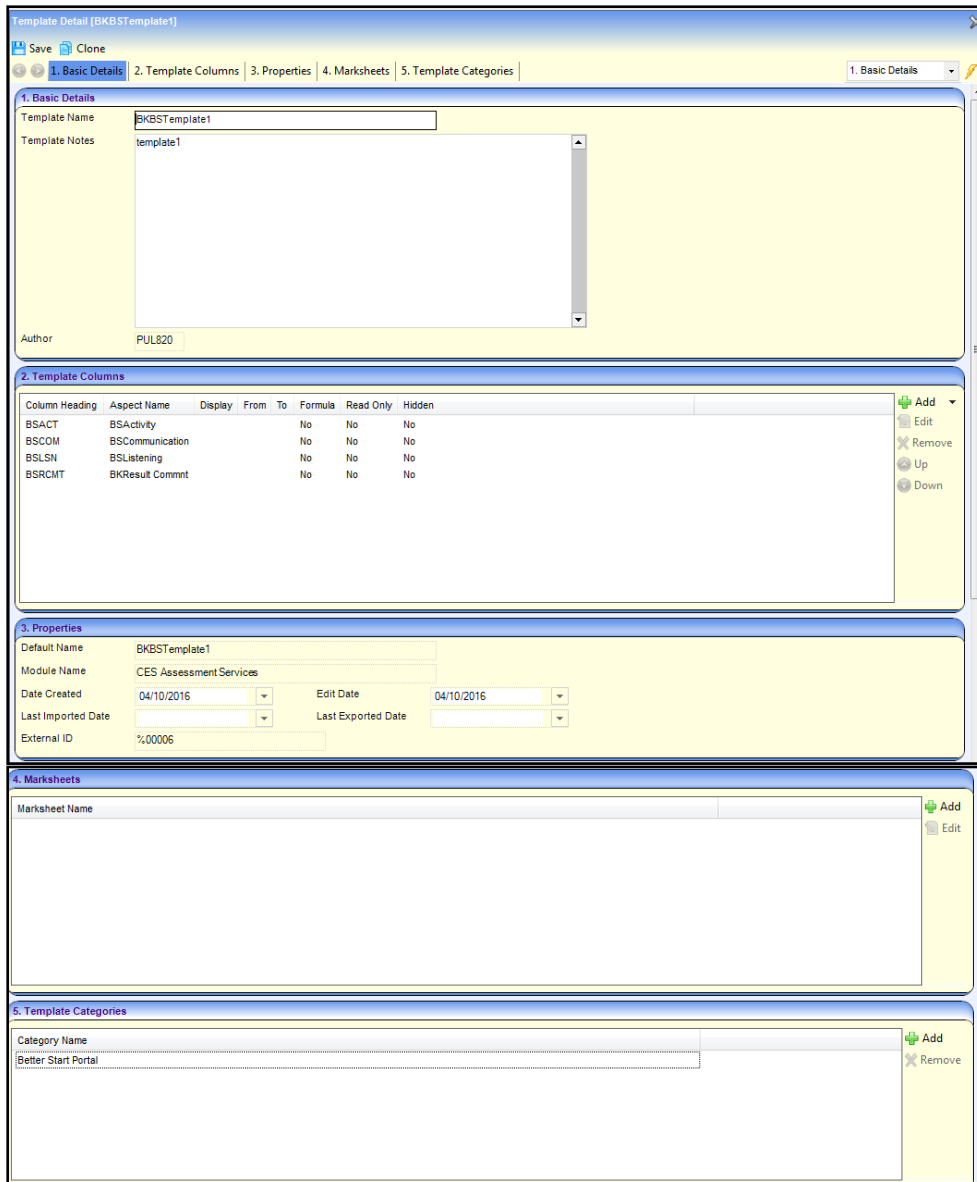
Aspects are used to define any criteria that can be used to measure performance against a student.

Viewing a Template

1. Select **Focus | Data Management | Templates** to display the **Template Enquiry** page.
2. Enter search criteria.
3. If required, select a category from the **Template Category** drop-down.
4. Click the **Search** button to display a list of matching templates.



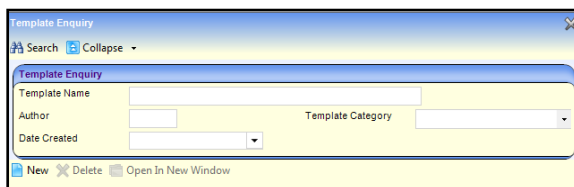
5. Highlight the required template and click the **Open In New Window** button.



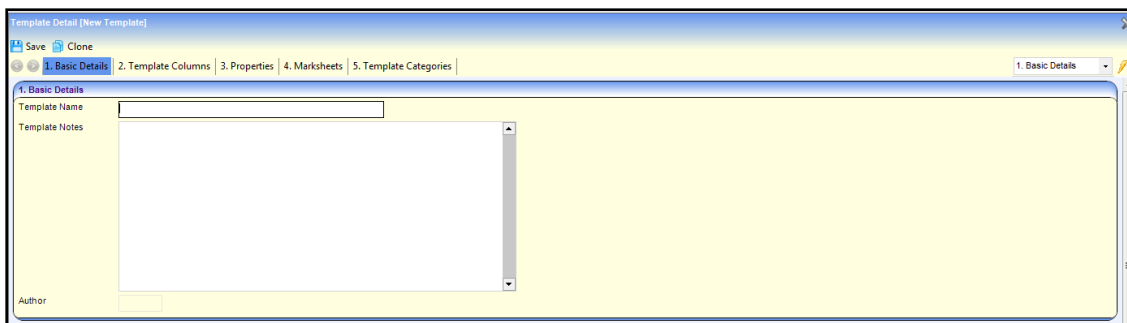
Adding a New Template

To add a new template you need to define the **Basic Details**, **Template Columns**, **Properties**, **Marksheets** and **Template Categories**.

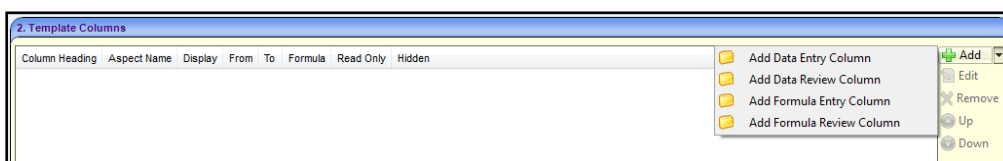
1. Select **Focus | Data Management | Templates** to display the **Template Enquiry** page.



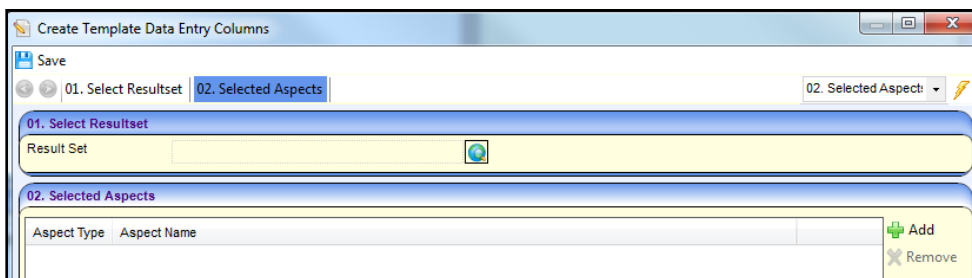
2. Click the **New** button to display the **Template Detail (New Template)** page.



3. Enter a **Template Name**.
4. If required, enter **Template Notes**.
5. Click the **Save** button.
6. Select the **Template Columns** panel.



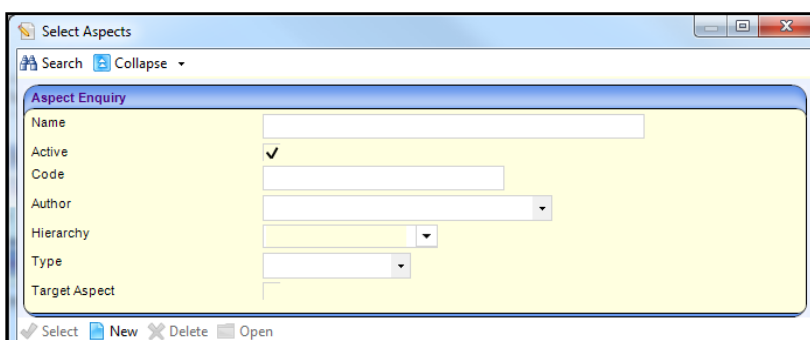
7. Select **Add Data Entry Column** from the **Add** drop-down to display the **Create Template Data Entry Columns** dialog.



8. If required, select a **Result Set**.

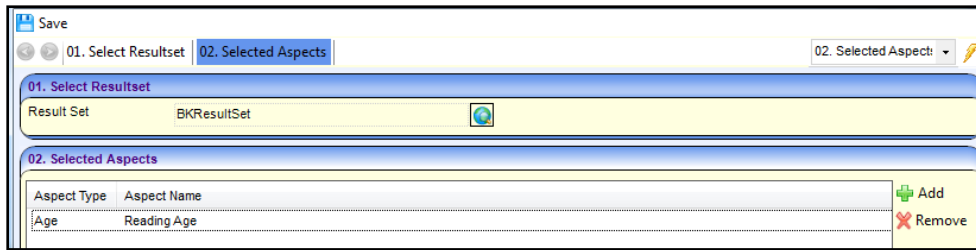
NOTE: A result set is used to group a set of aspects and results together. For more information, see [Managing Result Sets](#) on page 19.

9. Click the **Add** button on the **Selected Aspects** panel to display the **Aspect Enquiry** dialog.

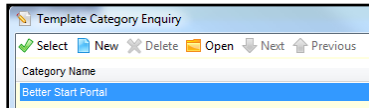


10. Enter search criteria and click the **Search** button.
11. Highlight one or more aspects and click the **Select** button.

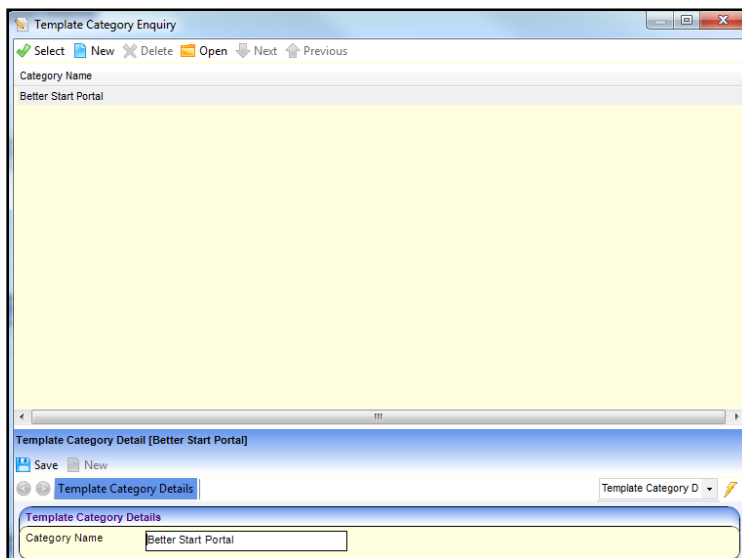
Managing Data



12. Click the **Save** button.
13. Select the **Template Categories** panel.
14. Click the **Add** button to display the **Template Category Enquiry** dialog.



15. Highlight the required category and click the **Select** button.

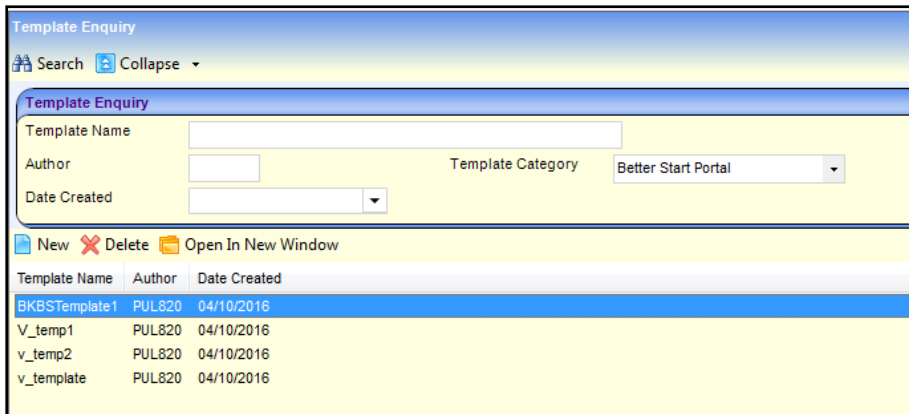


16. Click the **Save** button.
17. To save the template, click the **Save** button.

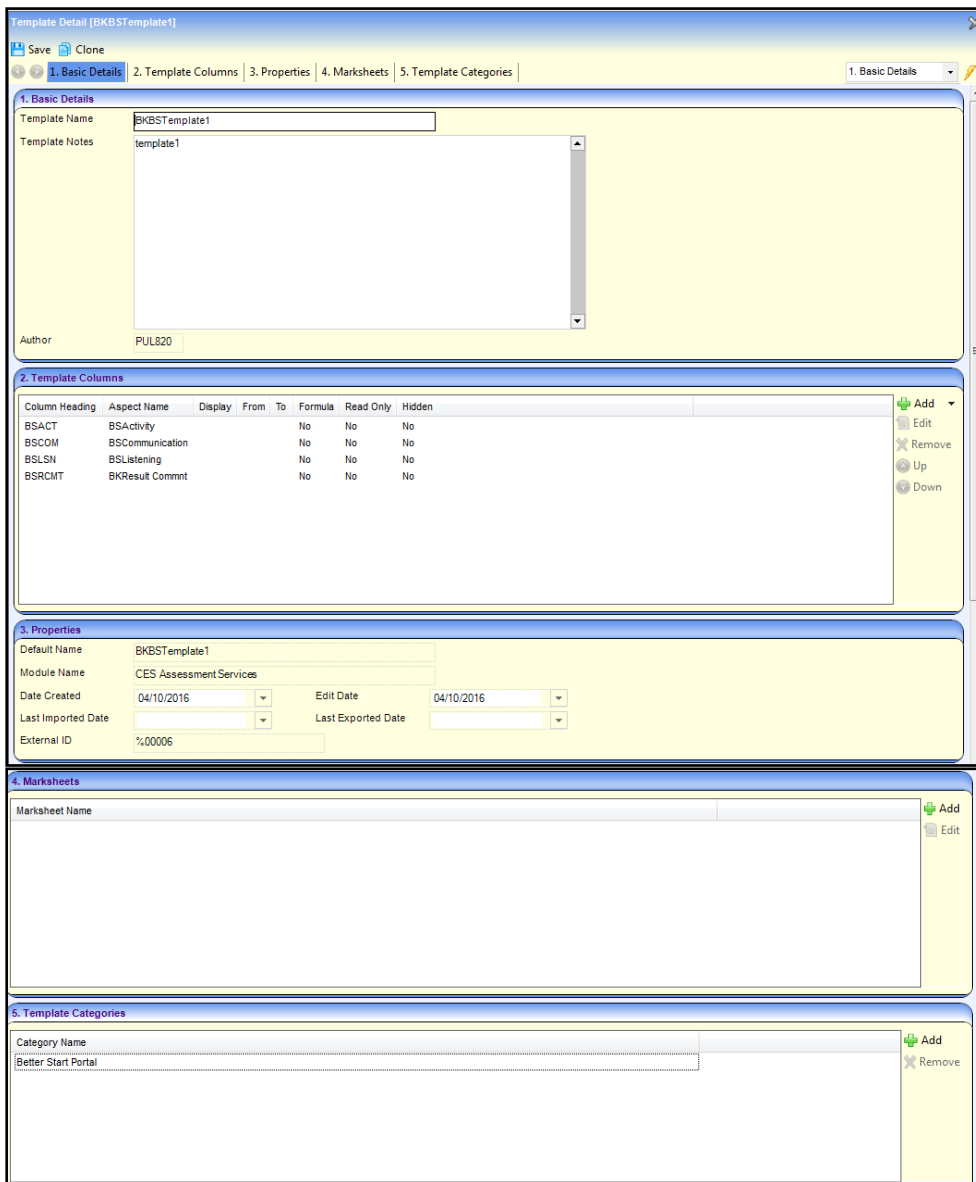
Updating a Template

To update a template:

1. Select **Focus | Data Management | Templates** to display the **Template Enquiry** page.
2. Enter search criteria.
3. If required, select a category from the **Template Category** drop-down.
4. Click the **Search** button to display a list of matching templates.



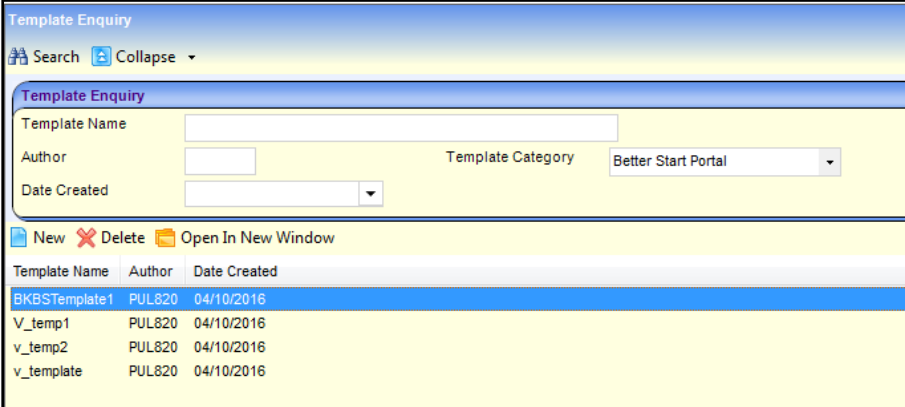
5. Highlight the required template and click the **Open In New Window** button.



6. Make the required changes and click the **Save** button.

Cloning a Template

1. Select **Focus | Data Management | Templates** to display the **Template Enquiry** page.
2. Enter search criteria.
3. If required, select a **Template Category** from the drop-down.
4. Click the **Search** button to display a list of matching templates.



The screenshot shows the 'Template Enquiry' interface. At the top, there is a search bar with a magnifying glass icon and a 'Collapse' button. Below this, the search criteria are displayed: 'Template Name' (empty text box), 'Author' (empty text box), 'Date Created' (empty date picker), and 'Template Category' (dropdown menu set to 'Better Start Portal'). Below the search criteria, there are three buttons: 'New' (blue), 'Delete' (red with an X), and 'Open In New Window' (orange). Below the buttons is a table with the following data:

Template Name	Author	Date Created
BKBSTemplate1	PUL820	04/10/2016
V_temp1	PUL820	04/10/2016
v_temp2	PUL820	04/10/2016
v_template	PUL820	04/10/2016

5. Highlight the required template and click the **Open In New Window** button.
6. Click the **Clone** button to display the **Template Detail (New Template)** page with the same details as the cloned template.
7. Enter a **Template Name**.
8. Update the details as required and click the **Save** button.

06 | Analysis Reporting

Using Areas, Clusters and Groupings

Introduction

Areas, clusters and groupings are used to populate groups of students in order to perform analysis.

Areas use a student's address to create a polygon or an area with a specified radius from a given point. To use this functionality, address details must contain Eastings and Northings.

A cluster is a collection of bases. It is used to populate a group of students within the selected bases.

A grouping enables you to define a group of students with common attributes regardless of base, e.g. eligible for free school meals or belonging to a particular ethnic group.

Using Attainment Targets

Introduction

Attainment targets enable you to store targets for aspects or groups of aspects (aspect hierarchies). Targets can be set for a base or a grouping of students or they can be national or Local Authority targets.

Setting Attainment Targets

The following four elements are used to set attainment targets:

- The aspect or aspect hierarchy against which the measure is calculated.
- The age, grade or mark values to be achieved.
- The group of students.
- The group percentage.

To support the targets, the following are used:

- An indication of the target threshold e.g. greater than C (>C) or equal to C (=C).
- The group percentage.

For example, School ABC should achieve greater than or equal to 54% as grades A* to C. This is expressed as follows:

Field	Value
Aspect Hierarchy	KS4 GCSE
Grade	C
Operand	>=
Group Percentage	54
Group Operand	>=

Field	Value
Base	ABC

Viewing an Attainment Target

1. Select **Focus | Analysis Reporting | Attainment Target** to display the **Attainment Target Enquiry** page.

2. If required, enter search criteria.
3. Click the **Search** button to display a list of matching attainment targets.
4. Select a record in the list and click the **Open In New Window** button to display the **Attainment Target** page.

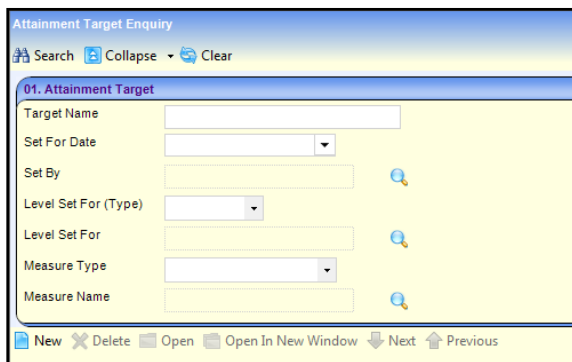
Adding a New Attainment Target

When a new attainment target is created, the following information can be recorded:

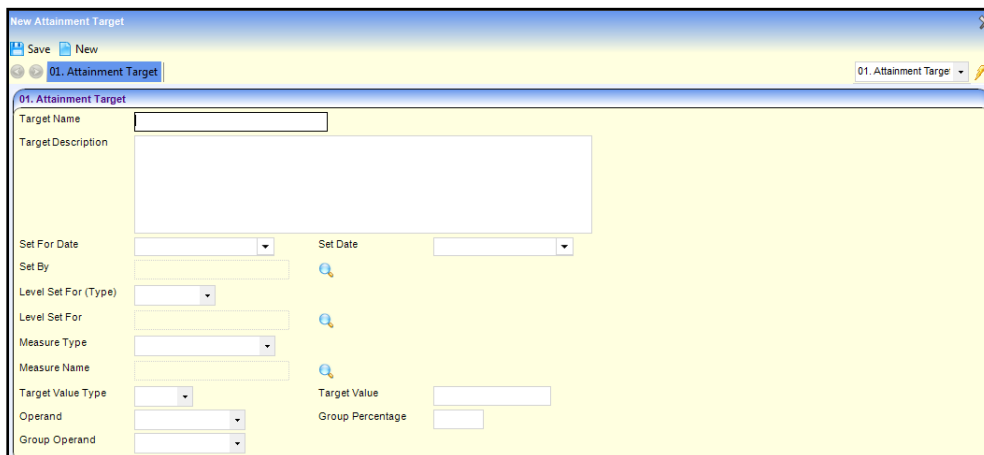
Field	Value
Target Name	Up to 25 characters.
Target Description	Up to 255 characters.
Set For Date	Date the target is set for (must be after the Set Date).
Set Date	Date the target is set (cannot be a future date).
Set By	Select from the Attainment Target Set By Enquiry.
Level Set For (Type)	National, LA, Base, Grouping or Cluster.

Field	Value
Level Set For	Automatically completed or selected from the browse depending on the value of Level Set For (Type).
Measure Type	Aspect or Aspect Hierarchy.
Measure Name	Select from Aspect Definition Enquiry or Aspect Hierarchy dialog.
Target Value Type	Grade, Age or Marks.
Target Value	The target value for the grade, age or marks.
Operand	Select from a list of possible values e.g. =, > or contains.
Group Percentage	The percentage of the group.
Group Operand	Select from a list of possible values e.g. =, > or contains.

1. To add a new attainment target, select **Focus | Analysis Reporting | Attainment Target** to display the **Attainment Target Enquiry** page.

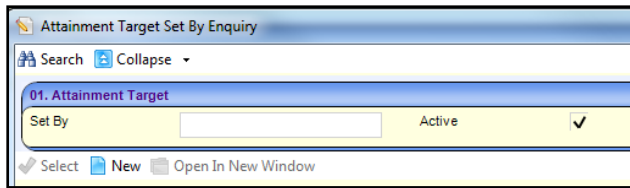


2. Click the **New** button to display the **New Attainment Target** page.



3. Enter a **Target Name** and a **Target Description**.
4. Select a **Set For Date**.
5. Select a **Set Date**.
6. Click the browse to display the **Attainment Target Set By Enquiry** dialog.

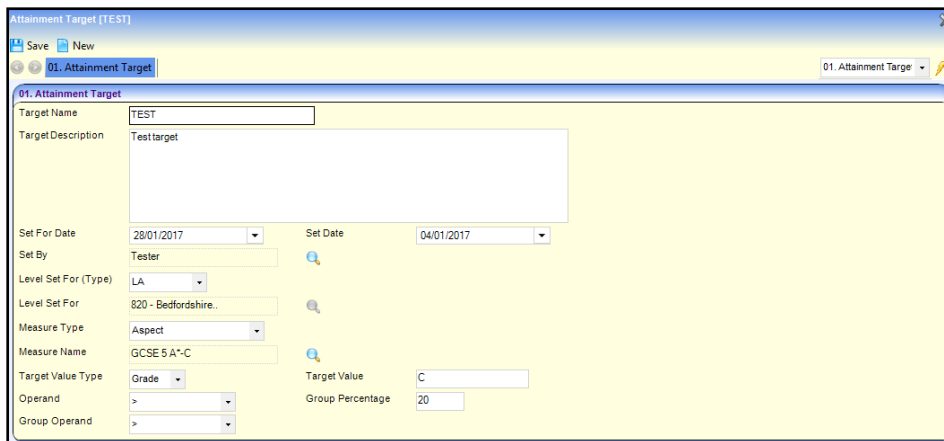
Analysis Reporting



7. If required, click the **New** button to create a new **Attainment Target Set By** record.
8. Click the **Search** button to display a list of **Set By** records.
9. Highlight the required record and click the **Select** button.
10. Select a **Level Set For (Type)** from the drop-down.
11. If required, select a **Level Set For** from the browse.
12. Select either **Aspect** or **Aspect Hierarchy** from the **Measure Type** drop-down.
13. Click the **Measure Name** browse button to select an aspect or aspect hierarchy.
14. Select a **Target Value Type** from the drop-down.
15. Enter a **Target Value**.
16. Select an **Operand** from the drop-down list.
17. Enter a **Group Percentage**.
18. Select a **Group Operand**.
19. Click the **Save** button.

Updating an Attainment Target

1. View the required attainment target. For more information, see [Viewing an Attainment Target](#) on page 42.



2. Update the required details:
 - a. Enter a **Target Description**.
 - b. Select a **Set For Date**.
 - c. Select a **Set Date**.
 - d. Select a **Level Set For (Type)** from the drop-down.
 - e. Select a **Level Set For** from the browse.
 - f. Select either **Aspect** or **Aspect Hierarchy** from the **Measure Type** drop-down.
 - g. Click the **Measure Name** browse button to select an aspect or aspect hierarchy.

- h. Select a **Target Value Type** from the drop-down.
 - i. Enter a **Target Value**.
 - j. Select an **Operand** from the drop-down list.
 - k. Enter a **Group Percentage**.
 - l. Select a **Group Operand**.
3. Click the **Save** button.

07 | Managing Attainment and Census Projects

Introduction

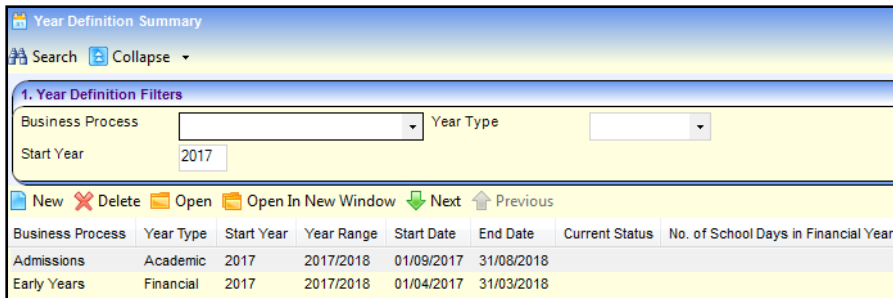
Attainment data is managed using attainment projects. Census data is managed using census projects. This chapter provides guidance on setting up attainment and census projects.

Setting up the Academic Year

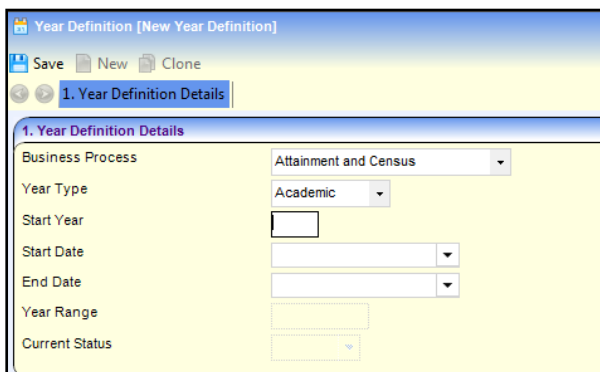
If the academic year has not already been set up for the attainment and census projects, it must be defined.

To set up the academic year for attainment and census projects:

1. Select **Tools | Year Settings | Year Definitions** to display the **Year Definition Summary** page.



2. Click the **New** button to display the **Year Definition (New Year Definition)** page.
3. Select **Attainment and Census** from the **Business Process** drop-down.
4. Select **Academic** from the **Year Type** drop-down.



5. Enter the **Start Year** (the year that the academic year starts).
6. Click the **Save** button.

Setting up a Base Cluster

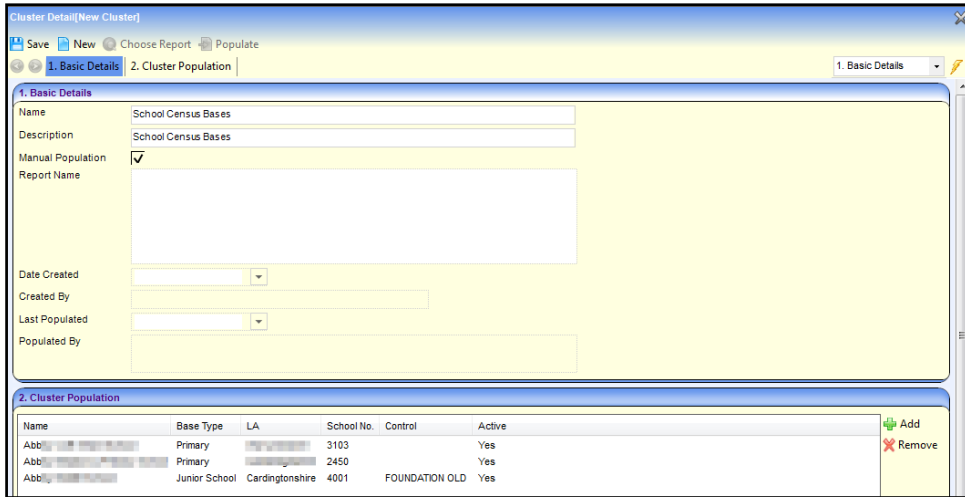
A base cluster must be set up for the attainment or census project. You can manually populate the base cluster or use an SSRS report:

1. Select **Focus | Analysis Reporting | Area, Clusters and Groupings**.
2. Select **Cluster** from the **New** drop-down to display the **Cluster Detail (New Cluster)** page.

3. Enter **School Census Bases** in the **Name** and **Description**.
4. To manually populate the cluster:
 - a. Select the **Manual Population** check box to display a tick.
 - b. On the **Cluster Population** panel, click the **Add** button to display the **Base Enquiry** dialog.
 - c. Enter the required search criteria and click the **Search** button.

Name	Base Type	LA	School No.	Control	Active
Abbas	Primary	...	3105		Yes
Abbey	Primary	...	3103		Yes
Abbey	Independent School	...	6049		Yes
Abbey	Secondary	...	4803		Yes
Abbey Maine School	High School	Cardingtonshire	4789		Yes

- d. Select one or more bases and click the **Select** button.



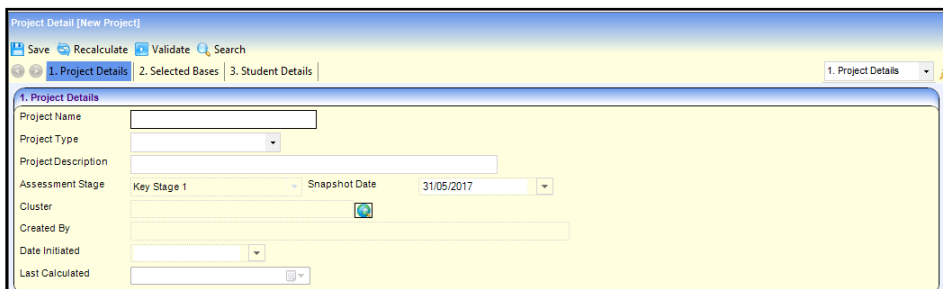
5. To populate the cluster using an SSRS report:
 - a. Select the **Manual Population** check box to display a cross.
 - b. Click the **Choose Report** button to display the **Report Chooser** dialog.
 - c. Select the required report and click the **Select** button.
6. Click the **Save** button.

Setting Up the Census Project and Importing Data

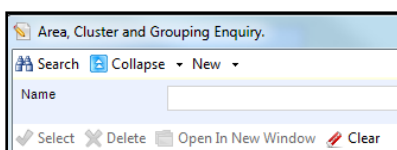
After defining the academic year and the base cluster for the census project, the project needs to be set up and then the data files can be imported.

To set up the census project:

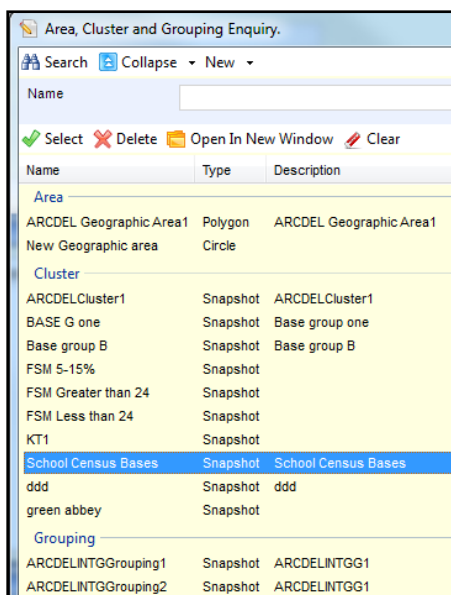
1. Select **Focus | Analysis Reporting | Data Collection | Projects**.
2. Click the **New** button.



3. Enter a **Project Name**.
4. Select **Census** from the **Project Type**.
5. Enter a **Project Description**.
6. Enter the **Snapshot Date** (date of the school census).
7. Click the browse button adjacent to **Cluster** to display the **Area, Cluster and Grouping Enquiry** dialog.



8. Click the **Search** button to display a list.



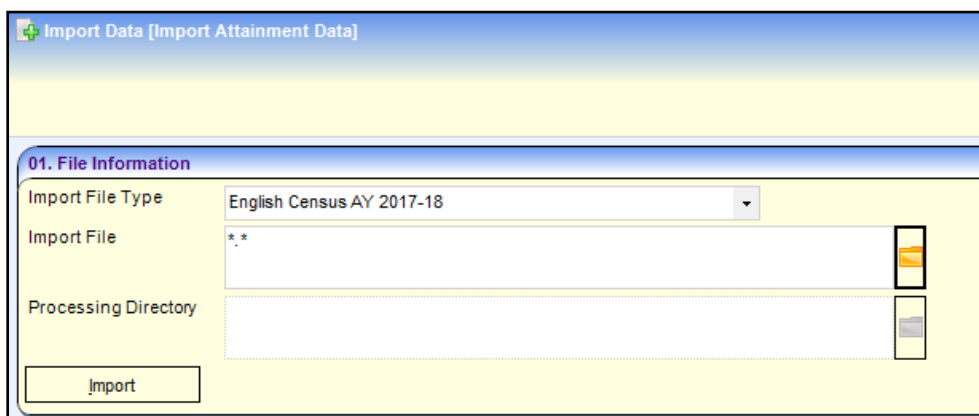
9. Select **School Census Bases** from the **Cluster** list and click the **Select** button.
10. Click the **Save** button.

NOTE: If you create the census project before census day, you will need to open the project after the day and click the **Recalculate** button to update the data in the project.

Importing the Census Files

To import the census files:

1. Select **Focus | Data Management | Import | Import Data**.
2. Select the latest English Census AY or Welsh Census FT from the **Import File Type** drop-down.



3. Select one or more school census files from the **Import File** browse.
4. Click the **Import** button.

NOTE: The census data is imported into its own tables. Importing census data does not affect the live tables. After the census files have been validated on COLLECT, the files can be downloaded and re-imported into Capita One. This overwrites the existing census data and ensures that any changes are captured. This is important if you intend to use the data for reporting purposes.

Running the Exception Report

NOTE: The Exception Report should be run as close to the census date as possible.

1. Select **Focus | Analysis Reporting | Data Collection | Projects** to display the **Project Enquiry** page.
2. Click the **Search** button to display a list of projects.

Project Name	Project Type	Assessment Stage	Snapshot Date	Created By	Date Initiated	Last Calculated	Threshold Mark
Project 2	Census		15/01/2015	Rama1	17/07/2014	17/07/2014 07:12:29	
Proj1	Assessment Manager	Key Stage 1	31/05/2014	Rama1	15/07/2014	25/07/2014 08:11:08	
	Assessment Manager	Key Stage 1 - Phonics	22/06/2014	Niran	08/07/2014	15/07/2014 05:49:22	
999	Census		16/01/2014	Niran	14/01/2014	08/07/2014 11:40:45	
	Assessment Manager	Key Stage 1 - Phonics	22/06/2013	System Administrator	09/07/2013	08/07/2014 11:40:56	
	Census		06/01/2016	System Administrator	06/01/2016	06/01/2016 05:10:45	
	Census		08/07/2014	Niran	08/07/2014	08/07/2014 06:30:09	
	Census		15/05/2014	Niran	08/07/2014	15/07/2014 08:46:18	

3. Select the required project and click the **Open In New Window** button to display the **Project Detail** page.

2. Selected Bases

Base Name	School No.	Status	Census	Count	Expected	Complete	Duplicated	Comments
Green Abbey School	4231	No Data	0	2	0	0	0	

3. Student Details

Student Name	Date of Birth	NCY	Validation Status	Exception
Ashley	07/08/2006	3	Error	Missing Student
Sri	01/01/2000	9	Error	Missing Student

4. Click the **Census Options** link in the **Links** panel to display the **Census Options** page.

02. Exception Report Filters

Unknown Student	<input checked="" type="checkbox"/>	Missing Student	<input checked="" type="checkbox"/>
FSM Eligible Flag Conflict	<input checked="" type="checkbox"/>	SEN Conflict	<input checked="" type="checkbox"/>
SEN Rank and Need Conflict	<input checked="" type="checkbox"/>	In Public Care Conflict	<input checked="" type="checkbox"/>
Ethnic Code Set Conflict	<input checked="" type="checkbox"/>	Inactive Student	<input checked="" type="checkbox"/>
Exclusion Display Details	<input checked="" type="checkbox"/>	Exclusion Public Care	<input checked="" type="checkbox"/>
SENProvision	<input checked="" type="checkbox"/>	Grants and Benefits FSM Conflict	<input checked="" type="checkbox"/>
Student FSM History Conflict	<input checked="" type="checkbox"/>	Early Years Pupil Premium Conflict	<input checked="" type="checkbox"/>

03. Selected Bases

Base Name	School No.	Status	Census	Count	Expected	Complete	Duplicated	Comments

Managing Attainment and Census Projects

5. Select the census date from the **Survey Date** drop-down.
6. On the **Exception Report Filters** panel, select the required check boxes to include these details in the **Exception Report**.
7. Click the **Save** button.
8. Close the **Census Options** window.

The screenshot shows the 'Project Detail [ggg]' window. It has a menu bar with 'Save', 'Recalculate', and 'Aggregate'. Below the menu are three tabs: '1. Project Details', '2. Selected Bases', and '3. Student Details'. The '2. Selected Bases' tab is active. The '1. Project Details' panel contains fields for Project Name (ggg), Project Type (Census), Project Description (gggg), Snapshot Date (18/01/2014), Cluster (ddd), Created By, Date Initiated (14/01/2014), and Last Calculated (11/07/2017 15:01:12). The '2. Selected Bases' panel shows a table with columns: Base Name, School No, Status, Census, Count, Expected, Complete, Duplicated, and Comments. One row is visible: Green Abbey School, 4231, No Data, 0, 2, 0, 0, 0. The '3. Student Details' panel shows a table with columns: Student Name, Date of Birth, NCY, Validation Status, and Exception. Two rows are visible: one with Date of Birth 07/08/2006, NCY 3, Validation Status Error, and Exception Missing Student; another with Date of Birth 01/01/2000, NCY 9, Validation Status Error, and Exception Missing Student.

9. On the **Selected Bases** panel, right-click on the required **Base Name** and click **View Exception Report**.

NOTE: After the census files have been validated on COLLECT, it is recommended that they are downloaded and re-imported into Capita One. This ensures that any changes are captured. The Exception Report does not need to be re-run.

Managing the Attainment Data

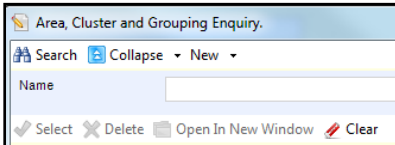
After defining the academic year and the base cluster for the attainment project, the project needs to be set up and then the data files can be imported.

1. Import the aspects and templates provided in the AMPARK.
2. Import the Translation table.
3. Select **Focus | Analysis Reporting | Data Collection | Projects**.
4. Click the **New** button to display the **Project Detail (New Project)** page.

The screenshot shows the 'Project Detail (New Project)' window. It has a menu bar with 'Save', 'Recalculate', 'Validate', and 'Search'. Below the menu are three tabs: '1. Project Details', '2. Selected Bases', and '3. Student Details'. The '1. Project Details' tab is active. The '1. Project Details' panel contains fields for Project Name, Project Type, Project Description, Assessment Stage (Key Stage 1), Snapshot Date (31/05/2017), Cluster, Created By, Date Initiated, and Last Calculated.

5. Enter a **Project Name**.

6. Select **Assessment Manager** from the **Project Type** drop-down.
7. Enter a **Project Description**.
8. Select an **Assessment Stage** from the drop-down.
9. Enter the **Snapshot Date** (date of the summer school census).
10. Click the browse button adjacent to **Cluster** to display the **Area, Cluster and Grouping Enquiry** dialog.



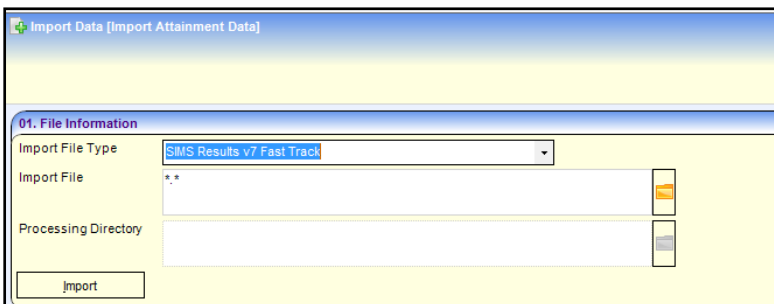
11. Click the **Search** button to display a list.
12. Select the required cluster from the list and click the **Select** button.
13. Click the **Save** button.

NOTE: If you create the attainment project before the snapshot date, you need to open the project on or after the snapshot date and click the **Recalculate** button to update the data.

Importing the Attainment Files

After the project has been set up, the files can be imported.

1. Select **Focus | Data Management | Import | Import Data**.
2. Select the **SIMS Results v7 Fast Track** import file specification from the **Import File** drop-down.
3. Select the attainment files to be imported.

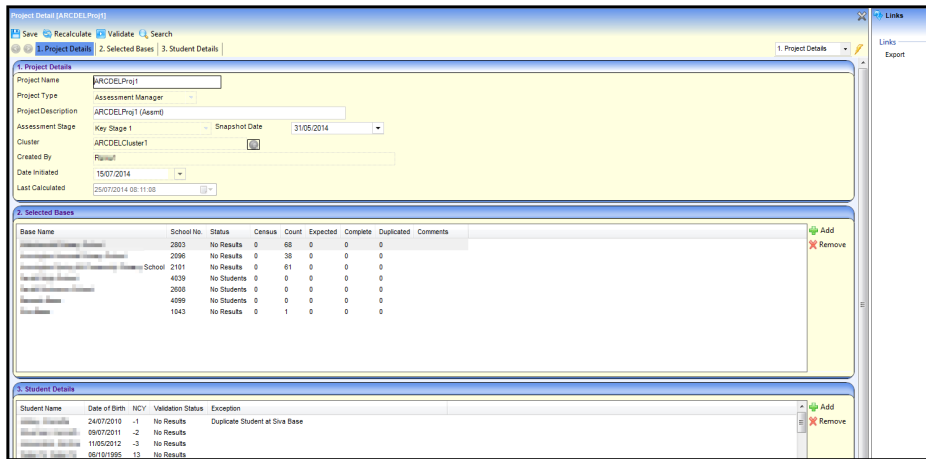


4. Click the **Import** button.

Validating the Results

1. Select **Focus | Analysis Reporting | Data Collection | Projects** to display the **Project Enquiry** page.
2. Click the **Search** button to display a list of projects.
3. Select the required project and click the **Open In New Window** button to display the **Project Detail** page.

Managing Attainment and Census Projects

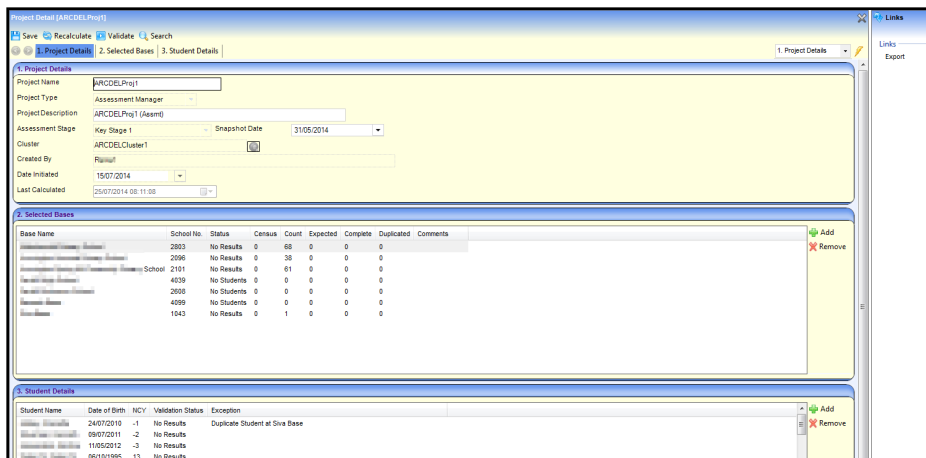


4. Click the **Validate** button.
5. Click the **Save** button.

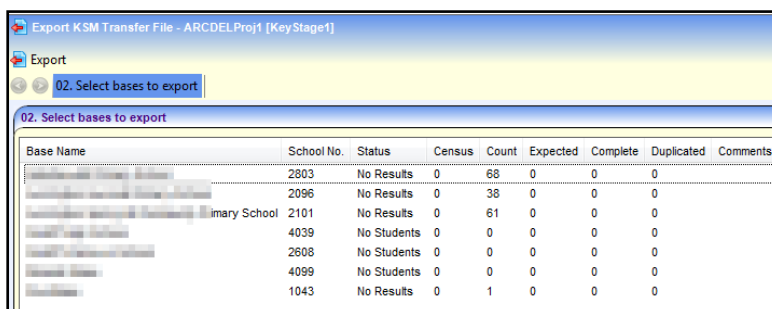
Exporting the Attainment Files

The results can be exported to upload onto COLLECT.

1. Select **Focus | Analysis Reporting | Data Collection | Projects** to display the **Project Enquiry** page.
2. Click the **Search** button to display a list of projects.
3. Select the required project and click the **Open In New Window** button to display the **Project Detail** page.



4. Click the **Export** link in the **Links** panel to display the **Export** page.



5. Select the required bases and click the **Export** button to display a dialog box.
6. Click the **OK** button.

7. Select **Window | My Home Page** to display the home page.
8. On the **My Workflow Messages** panel, click the **Refresh** button.

Subject	Task	Due	Assigned By	Post	Assigned On	Message
Case note is ch...		16/07/2016	System Administr...		16/07/2014	
Due Today						
ARCDELProj1		Today	System Administr...		18/07/2017	'KSM Export' Export created successfully for 'Siva Base'
Not Due						
test		24/07/2017	System Administr...		11/07/2017	

9. Save the required XML files.

08 | Glossary of Terms

AMPARK

AMPARK (Assessment Manager and Performance Analysis Resource Kit) is a set of resources that can be used for assessment and performance analysis.

Areas, Clusters and Groupings

Areas use a student's address to create a polygon or an area with a specified radius from a given point. To use this functionality, address details must contain Eastings and Northings.

A cluster is a collection of bases. It is used to populate a group of students within the selected bases.

A grouping enables you to define a group of students with common attributes regardless of base e.g. eligible for free school meals or belonging to a particular ethnic group.

Aspects

Aspects are a method of defining the criteria for measuring performance. They are used in PULSE to hold results against a student.

Assessment Template

An assessment template is used to define the set of columns displayed in a marksheet.

Attainment Targets

Attainment targets enable you to store targets for aspects or groups of aspects (aspect hierarchies).

COLLECT

The Department for Education's centralised data collection and management system.

Marksheet

A marksheet is used in PULSE to present and manipulate a set of results for a group of aspects and a group of students. A marksheet can only be associated with one template.

Result Set

A result set is a mechanism for grouping a set of aspects (results) together to enable their bulk import/export and analysis.

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