



CASPA 2009

Comparison and Analysis of Special Pupil Attainment

Installation and first use instructions for schools using SIMS .net

This document gives brief details of the procedure for upgrading from CASPA 2008 to CASPA 2009 for existing users, or installing CASPA 2009 for new users, and includes instructions for the set-up and first use of the School Data Collection Module of CASPA 2009 for schools who are using SIMS .net.

1. Installation of the School Data Collection module of CASPA 2009

If you are an existing user of CASPA 2008:

For existing users of CASPA 2008, CASPA 2009 installs as an upgrade. Click **Help | Check for updates...** in CASPA 2008 to start the upgrade process, during which CASPA 2008 will be upgraded to the latest version and CASPA 2009 will be installed and short-cuts created on the desktop. If you are able to use the built-in 'Check for updates' functionality, this will provide the simplest upgrade route, as CASPA 2008 will be able to supply the upgrade installer with the information it requires; if you manually upgrade from CASPA 2008 to CASPA 2009, you will have to ensure the CASPA 2009 installer is saved to and run from the CASPA 2008 installation directory.

To upgrade to CASPA 2009 using the built-in 'Check for updates' functionality in CASPA 2008:

Click **Help | Check for updates...** in CASPA 2008 to start the upgrade process.

In order to download the upgrade set-up file, CASPA 2008 will need to connect to the Internet. If you are running a firewall or other Internet security package, you may receive a warning that a program named 'Caspa08.exe' is attempting to connect to the Internet; if you receive such a warning, please allow the connection to take place. If you permanently block connections from this software, you will not be able to download the upgrade using the built-in 'Check for updates' functionality until you manually remove the download block from your Internet security package.

The 'Check for updates' process supports the use of authenticating proxy servers; if you use an authenticating proxy server, please click the 'Set proxy information' button to enter proxy server id, proxy user name and proxy password. For all other cases, CASPA uses the same Wininet information that is used to allow, for example, Internet Explorer to connect to the Internet.

The following steps will complete the upgrade:

1. On completion of the download, CASPA 2008 will close to allow CASPA 2008 to be updated, and the self-extractor for the CASPA 2009 Installer will launch automatically;
2. Review the licence conditions, click the check box to accept and click the 'Continue' button to proceed with the installation;
3. On completion, please select the appropriate type of school MIS (SIMS) to display the relevant setup instructions and click the 'Finish' button.

Please now proceed to Section 2 of this document, 'Exporting pupil data from SIMS .net for import into CASPA'.

To manually upgrade to CASPA 2009:

Please follow these steps:

Click **Help | Check for updates...** in CASPA 2008 to display the 'Check for updates' dialog, then click the button labelled 'Launch web browser for manual download of updates' to display the CASPA manual upgrade web page, from where the upgrade package can be manually downloaded and applied. Full instructions are given on the manual upgrade web page, which you are recommended to

print, and are summarised below:

1. Click the 'Launch web browser for manual download of updates' button;
2. A dialog box will display the drive and directory where CASPA 2008 is installed - make a note of this as you will require this information when downloading the upgrade package;
3. Your web browser will display the CASPA manual upgrade web page; please print this page for reference, and decide which type of download you require;
4. Right-click your chosen type of installation package, select 'Save Target As' or 'Save As', depending on your browser type, browse to the CASPA 2008 installation directory noted at step 2, and click Save;
5. Close your browser;
6. Close CASPA 2008;
7. Browse to your CASPA 2008 installation directory;
8. If you have downloaded the upgrade as a zip archive, unzip the archive Caspa09Setup.zip to your CASPA 2008 installation directory;
9. Locate the file Caspa09Setup.exe and double-click to run the self-extractor for the CASPA 2009 Installer;
10. On completion, the CASPA 2009 Installer will launch automatically;
11. Review the licence conditions, click the check box to accept and click the 'Continue' button to proceed with the installation;
12. On completion, please select the appropriate type of school MIS (SIMS) to display the relevant setup instructions and click the 'Finish' button.

Please now proceed to Section 2 of this document, 'Exporting pupil data from SIMS .net for import into CASPA'.

If you are a new user of CASPA:

New users of CASPA can install CASPA to either a local or a network drive. Your data is valuable, so we recommend installing to a location that will automatically be backed up. Please contact your network administrator if you require further advice.

If you are installing CASPA to a network location, it is strongly recommended that the CASPA installer is run from a workstation that will be used to access CASPA, rather than being run on the server itself. This will ensure that the short-cuts created on the desktop during installation point to the server location of CASPA; to make CASPA accessible from other machines, simply copy these desktop short-cuts.

Installation and preparation of the system comprises two tasks:

1. Select your installation location, as described above
2. Download and run the single-image setup file from the following url:
<http://www.sgasystems.co.uk/caspa/setups/Caspa09Setup.exe>

To install CASPA 2009, download the CASPA 2009 set-up file in accordance with the instructions supplied by your Local Authority and follow these steps:

1. On completion of the download, run the self-extractor for the CASPA 2009 Installer;
2. Review the licence conditions, click the check box to accept and click the 'Continue' button to proceed with the installation;
3. Confirm that you are installing CASPA 2009 as a new installation and that you do not already have CASPA 2008 installed to upgrade. If so, click the 'Install CASPA 2009' button.
4. Enter your Local Authority number and ensure the installation type radio button remains checked as 'School Module'. Select the location for installation of CASPA 2009 using the 'Browse' button and click on the 'Make new folder' button to create the directory into which CASPA 2009 will be installed. This directory name is normally called 'CASPA09' but you can choose to name it differently if required. Click the 'Install CASPA09' button to continue.
5. On completion, please select the appropriate type of school MIS (SIMS) to display the relevant setup instructions and click the 'Finish' button.

2. Exporting pupil data from SIMS .net for import into CASPA 2009

To avoid the need to re-key pupil data recorded in your school MIS, and to ensure that your school MIS is the definitive record of pupil data in your school, basic pupil data in CASPA is maintained by the import or refresh

of records based on data exported from SIMS .net. Preparing an export of pupil data from SIMS .net for import into CASPA requires two steps:

1. Import the supplied Report Definition file into SIMS .net
2. Run the supplied report in SIMS .net to export data to intermediate file

Importing CASPA's Report Definition file into SIMS .net

If CASPA 2009 is installed in a location from which SIMS .net is accessible, you can proceed immediately with the import of the supplied SIMS .net report definition file into SIMS .net; otherwise, please copy the SIMS .net report definition file **CASPA Pupil Data 2009.RptDef** located in the directory to which CASPA 2009 was installed to removable media from which it can be imported into SIMS .net.

To import the supplied SIMS .net report definition file into SIMS .net, please proceed as follows. Start SIMS .net, and select **Reports|Import**. At the 'Import report(s)' dialog, click the Open button, which will display a standard Windows 'Open file' dialog. Browse to either the CASPA 2009 installation directory or the removable media to which the report definition file was copied at the previous step, and select the file **CASPA Pupil Data 2009.RptDef**. Click Open to return to the 'Import report(s)' dialog, which will now list the selected file as awaiting import. To complete the import, click the Import button.

Exporting pupil data from SIMS .net:

IMPORTANT!! Prior to exporting data from SIMS .net, SIMS .net must be shut down and restarted.

This is because the default behaviour of the SIMS .net report generator is to attempt to create the export file in the directory last used for any file-based operation. Restarting SIMS .net ensures that the export file will be created in the default location in which CASPA expects to find it.

To export pupil data from SIMS .net, select **Reports|Run**, browse to select the report 'CASPA Pupil Data 2009' (under Focus | Student) and click Run; the relevant pupil data will be exported to a file in XML format.

3. First use of the School Data Collection module of CASPA 2009

CASPA user accounts:

For security reasons, CASPA 2009 requires every user to have their own UserName and Password. Each user will be assigned to one of the CASPA roles described below, which will determine their privileges within CASPA.

CASPA user accounts can be created and managed by users allocated the CASPA role of System Manager via the the menu option **Admin | Maintain CASPA user accounts for this installation**. This menu option will only be available to CASPA users who are designated as a System Manager. For more information please refer to the CASPA Help system.

- **System manager:** the System Manager role allows the creation, editing, enabling and disabling of user accounts and the resetting of 'lost' passwords; a System Manager inherits the highest of the remaining three roles available for the specific type of CASPA installation
- **Administrator:** the Administrator role allows full access to all data maintenance and reporting features of CASPA and is available for the MAIN installation of CASPA only
- **Teacher:** the Teacher role allows all data to be viewed and reports to be run; it does not allow assessment results to be edited, but it does allow multi-media evidence supporting assessments to be added, edited and deleted; the Teacher role is available for MAIN and CLASSROOM installations of CASPA
- **Guest:** the Guest role allows data to be viewed and reports to be run but does not allow any data to be altered and is available for MAIN, CLASSROOM and GUEST installations of CASPA

First use of CASPA 2009 - basic system configuration:

Configuration of CASPA comprises a number of steps, as outlined below:

- **For all CASPA installations:**
 1. Create a System Manager user account for the installation of CASPA
 2. Select the required type of CASPA installation
- **For MAIN installations only:**
 3. Identify the school to which the CASPA installation belongs
 4. Identify your school MIS type and identify any external sources of assessment data

To launch CASPA 2009, please click the short-cut for CASPA 2009 that will have been installed to your desktop.

Create a System manager user account for the installation of CASPA:

To commence configuration of CASPA 2009, double-click the CASPA 2009 icon on your desktop. At the initial login dialog, please log in to CASPA as follows:

UserName: **SYSMAN**
 Password: **ChangeOnInstall** (Note: CASPA passwords are case-sensitive)

If the UserName and Password noted above are entered correctly, the 'Create a System Manager user account' dialog will be displayed and you will be required to create a System Manager user account for this installation of CASPA; press F1 to access the CASPA Help system for guidance.

Note: it is recommended that every MAIN or CLASSROOM installation of CASPA have at least two users with System Manager privileges; once configuration is complete, additional CASPA user accounts can be created as required via the menu option **Admin | Maintain CASPA user accounts for this installation**

Once a System Manager user account has been created, the newly-created System Manager will be required to log in again using their UserName and the temporary use-once Password generated by CASPA; once logged, the System Manager will be required to choose their own permanent Password. On completion, the 'Select type of installation' dialog will then display.

Select the required type of CASPA installation:

To cater for the needs of different audiences within schools and the varying network infrastructure in schools, CASPA offers three types of installation, as described on the 'Select type of installation' dialog box; press F1 to access the CASPA Help system for further guidance. Each school must have one and only one MAIN installation of CASPA.

If you have selected a CLASSROOM or GUEST installation of CASPA, configuration of the system is now complete as the CLASSROOM or GUEST installation inherits configuration information from the MAIN installation from which data will be imported; for MAIN installation types, the following two stages are required to complete configuration.

Identify the school to which the CASPA installation belongs:

For a MAIN installation of CASPA, the 'School registration' dialog box will now be displayed to allow you to select the school to which the system is to be registered. Please either enter the four-digit DCSF number for your school, or select the school name from the drop-down list; press F1 for additional guidance.

Identify your school MIS type and identify any external sources of assessment data:

Once you have confirmed you have selected the correct school, you will be prompted for to confirm the means by which pupil data is to be maintained in CASPA. Schools using SIMS .net should ensure that the SIMS.net option is selected, the click OK to continue.

To avoid the need to re-key assessment results held elsewhere, CASPA allows the import of assessment results from a variety of electronic sources. Whilst the import of assessment results from most of these sources will be a one-off event, if the school is maintaining their assessment data via a commercial assessment package such as B Squared or PIVATS it may be the case that the school will wish treat such a

system as their definitive record of assessment data and periodically import read-only data into CASPA for analysis. and B Squared. In other cases, selecting the default option to maintain results in CASPA by manual entry will be appropriate, in which case click OK to proceed. If you wish to import results from either PIVATS or B Squared, please select the appropriate option here. Further details on the interaction of CASPA with either PIVATS or B Squared and the dialog to allow selection of aspects for which to import results can be found in the documents '*Import assessment results from B Squared*' and '*Import assessment results from PIVATS*'.

On completion, the main CASPA screen will display. As pupil data has not yet been imported, the toolbar and most menu options will be disabled.

Creating pupil records in CASPA from data exported from SIMS .net:

To create pupil records using the pupil data exported from SIMS .net, select **File|Create pupil records from SIMS .net export file**.

- If you have installed your main installation of CASPA 2009 to a location from which SIMS .net is accessible, the file containing data exported from SIMS .net will be located automatically, and a series of dialog prompts will guide you through the import process. If you are warned that the file cannot be found, please refer to the important note above (in red) regarding export of data from SIMS .net
- If you have installed your main installation of CASPA 2009 to a location from which SIMS .net is not accessible, for example a different network, you will be prompted for the location from which the file exported from SIMS .net is to be imported; please click F1 for Help. A series of dialog prompts will guide you through the import process.

On completion of your import, a report will display to allow you to verify that the correct data has been imported.

A dialog will then allow you to select the pupils for whom you wish to maintain assessment data within CASPA; again, a series of dialog prompts will guide you through this.

You will then be offered the chance to view or print data recording sheets, which may be a useful means of gathering the assessment results to be entered into CASPA. If you choose to view or print data recording sheets, you must then select the pupils for whom they are to be generated; you can apply a condition to filter your pupils, and can then either use the buttons below the grid to select/deselect all matching pupils, or click on pupils individually to select them - press F1 for guidance. Once you have selected the required pupils, click the Report button; when you close the report, you will return to the pupil selection dialog to allow you to change your selection criteria should you wish to do so. When you are finished, click Close.

All features of CASPA will now be enabled. For any further guidance, please refer to the Help file file and the PDF files installed in your CASPA directory.