



SAM – Importing Rankings, Criteria and Banding

**Guidance for school
admissions staff on preparing
and importing rankings via
SAM**

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Introduction

Hackney Education must ensure all primary and secondary transfer applications are ranked before iterations take place. Own admitting authority schools and academies are responsible for ranking their own applications in line with their admissions arrangements. This task must be completed by secondary schools in January and by primary schools in March each year.

At the appropriate time during the admissions process the Admissions and Pupil Benefits Team will contact schools via email to confirm they are able to start ranking their applications within SAM.

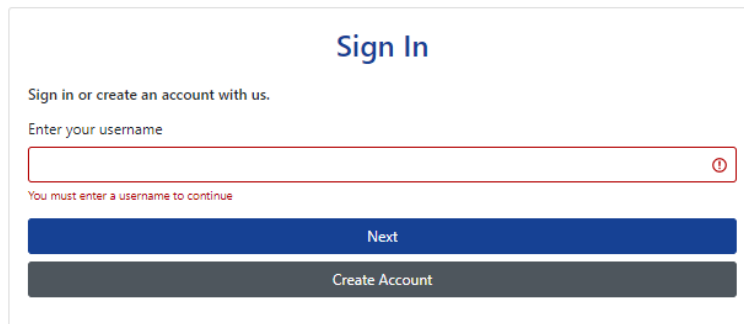
This document explains how schools can prepare for and import their ranked list(s) within SAM.

If you have any queries regarding ranking, you can contact the Admissions and Pupil Benefits Team on 0208 820 7125 Monday to Friday from 9am to 5pm.

Accessing the list via the School Access Module (SAM)

The Admissions and Pupil Benefits Team will send an email once the list of applications to be ranked is ready to be downloaded via SAM. Schools must use the school report provided rather than exporting a list direct from the admissions round because additional information has been included in the report to help with ranking. This includes confirmation of children with a Child Protection Plan, the CAT or TA score for schools that use banding and the criteria that you will need to use for ranking.

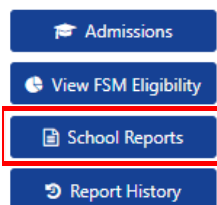
- ◆ To download the report, log in to SAM at <https://portal.learningtrust.co.uk/Synergy/Schools> using your school username and password:



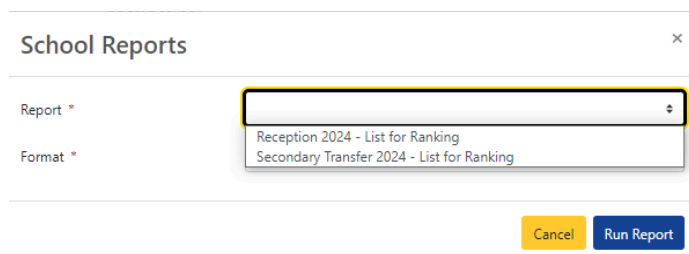
- ◆ Click 'School Reports':

School Access Module Home

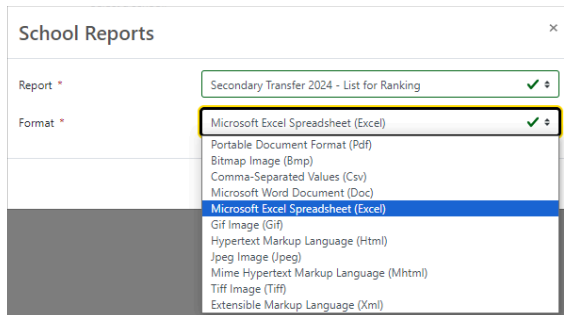
Welcome to the School Access Module. Here you can manage School Admissions, view the Free School Meals Eligibility Report, and send referrals to your Local Authority.



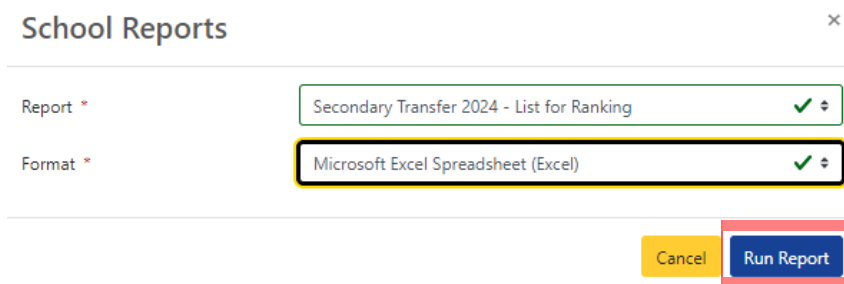
- ◆ Select the 'Secondary Transfer 202X - List for Ranking' or 'Reception 202X - List for Ranking' from the report drop down menu:



- ◆ Select 'Microsoft Excel Spreadsheet' from the format drop down menu:



- ◆ Click 'Run Report':



- ◆ Open and save the list as an 'Excel Workbook' (not as an Excel 97-2003 Workbook).

Preparing your ranked list(s) – schools using criteria only

Please click [here](#) if you are a school that uses bands **and** criteria.

Please use the SAM report as a master list for updating each applicant's position and qualifying criteria. You can add new columns and amend existing columns with the exception of the 'Application Reference', 'Position' and 'Criteria' columns. These columns must remain in the spreadsheet or you will not be able to import it back into SAM.

Please be aware of the following which will help you to rank each child:

- There are columns in the spreadsheet which confirm whether the child has an Education Health and Care Plan, is or was a Looked After child and/or has a Children Protection Plan. We have verified the status of these children with the relevant teams across Hackney Education, therefore if the status shows as 'Y' the child must be ranked accordingly. You can use the filter to select children who are 'Y'.
 - There are columns in the spreadsheet which indicate where applicants have made a Social/Medical, Sibling and/or Staff claim. You must ensure you check whether these children qualify under these criteria in line with your admission arrangements and rank them accordingly. You can use the filter to select children who have a claim set as 'Y'.
 - There is a free text column where applicants have given additional reasons for expressing a preference at your school/academy. You are advised to read these reasons. You can filter the children with additional reasons by unticking the 'Blanks'.
 - Each child can only be assigned ONE criteria. If they qualify for more than one criterion, you should rank the child using the highest criteria that they qualify for.
1. Open the spreadsheet and navigate to the 'Criteria' column. Enter the qualifying criteria for each child. You can copy and paste the criteria to the relevant children. Please be aware that the criteria entered must **exactly** match the name of the criteria that is shown in the 'Criteria' tab of your master spreadsheet. If the criteria you enter for a child does not match the name of a criteria in SAM an error will occur when trying to import the information.

	A	B	C	D	E
1	Application Reference	CAT or TA Score	Band	Criteria	Position
2	204-2024-09-E-002710	12			

2. Sort the spreadsheet by:
 - a. Late,
 - b. Criteria &
 - c. Distance (or alternative tie breaker)

3. Next enter the position number of each child in the 'Position' column:

A	B	C	D	E	F
Application Reference	CAT or TA Score	Band	Criteria	Position	Distance
204-2024-09-E-002710	12		EHCP		

Please be aware of the following which will help you to position each child:

- Position numbers must reflect the order in which the children should be offered places, therefore those that meet the criteria best must be ordered first.
- Position numbers should be in numerical order. For example, if there are 70 applicants, you must order the children from 1-70.
- Position numbers must be ordered in line with the tie break set out in your admission arrangements. For example, if there are more applications than places available, children must be ordered within each criteria using the tie break, i.e. – distance. Please refer to your admissions arrangements. You can use the sort function to order the children by criteria and distance (or other tie break) if necessary.
- Late applicants must be ranked after all on time applicants. There is a column titled 'Late' which confirms whether the child is a late applicant.

4. Next check each child to ensure they all have a criteria and position applied to them. You should not import the list back into SAM until all children in the spreadsheet have been ranked and you are happy that the ranking is correct.

5. Add a new tab to your master spreadsheet which you can use to carry out the import:

204-2023-09-E-3 - Sibling	14	0.893	N
204-2023-09-E-3 - Sibling	15	1.226	N
204-2023-09-E-3 - Sibling	16	1.773	N
204-2023-09-E-3 - Sibling	17	2.056	N
204-2023-09-E-3 - Sibling	18	2.091	N

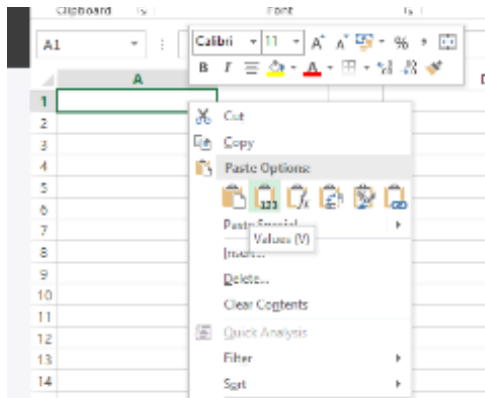
Applicants | Criteria | (+)

6. Highlight and copy the relevant columns from your master spreadsheet to your new import tab to reduce the likelihood of import errors:

- Application Reference,
- Criteria
- Position
- Distance

	A	B	C	D
1	Application F	Criteria	Position	Distance
2	204-2023-09-E-1 - F H C P		1	1.055
3	204-2023-09-E-1 - E H C P		2	1.159
4	204-2023-09-E-2 - L A C		3	0.815
5	204-2023-09-E-2 - L A C		4	2.137
6	204-2023-09-E-3 - Sibling		5	0.099
7	204-2023-09-E-3 - Sibling		6	0.205
8	204-2023-09-E-3 - Sibling		7	0.277
9	204-2023-09-E-3 - Sibling		8	0.39
10	204-2023-09-E-3 - Sibling		9	0.412
11	204-2023-09-E-3 - Sibling		10	0.442
12	204-2023-09-E-3 - Sibling		11	0.779

7. Go to your 'Import' worksheet, right click on your mouse in cell A1 and select 'Paste values' to copy the data. Paste values will remove any formatting that may cause the import to error:



8. Once you are happy, save your final spreadsheet and move on to page 16.

Preparing your ranked list(s) – schools using bands and criteria

Please use the SAM report as a master list for updating each applicant's position and qualifying criteria. You can add new columns and amend existing columns with the exception of the 'Application Reference', 'Position' and 'Criteria' columns. These columns must remain or you will not be able to import it back into SAM.

1. You will need to ensure there is a separate worksheet for each of your bands. This must be done so you can import the data back into SAM. To do this, you should click on the + button:

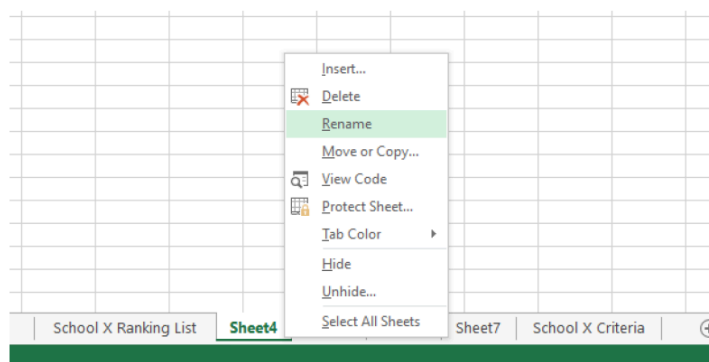
Application Reference	Band	Criteria	Position	CAT/TA Score
204-2023-09-E-001196				112
204-2023-09-E-001326				108
316-2023-09-E-004012				102
204-2023-09-E-002369				118
204-2023-09-E-001782				80
309-2023-09-E-000805				99
204-2023-09-E-000862				113
204-2023-09-E-000488				90
204-2023-09-E-001728				90
204-2023-09-E-000688				118
204-2023-09-E-002912				115
204-2023-09-E-001140				95
204-2023-09-E-000098				73
211-2023-09-E-005484				83
204-2023-09-E-000754				12
204-2023-09-E-001228				102
204-2023-09-E-001664				79

School X Ranking List | School X Criteria | +

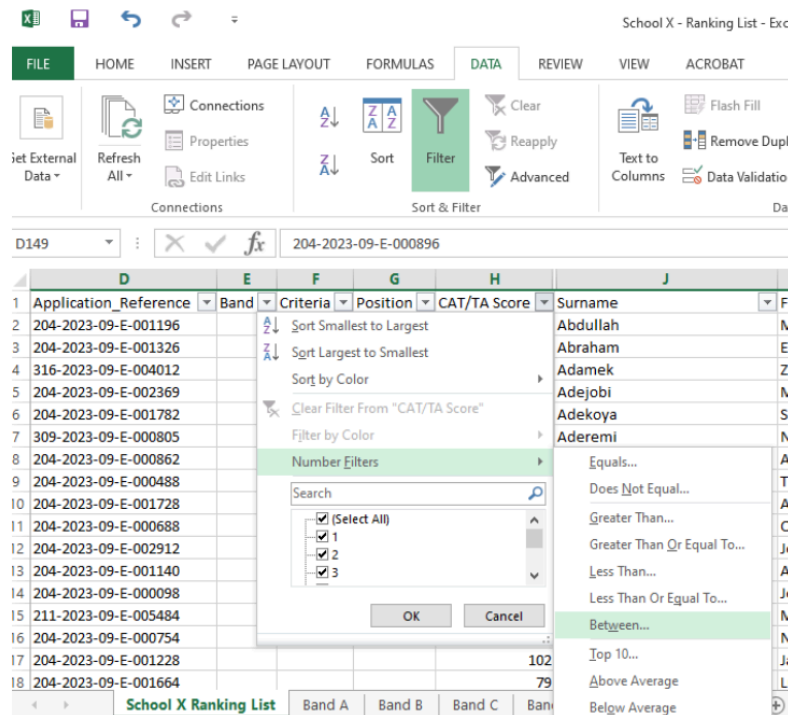
2. This will add a new worksheet. You should repeat this step until the number of new worksheets corresponds with the number of bands you have. In this example, I have added 4 new sheets to represent 4 bands:



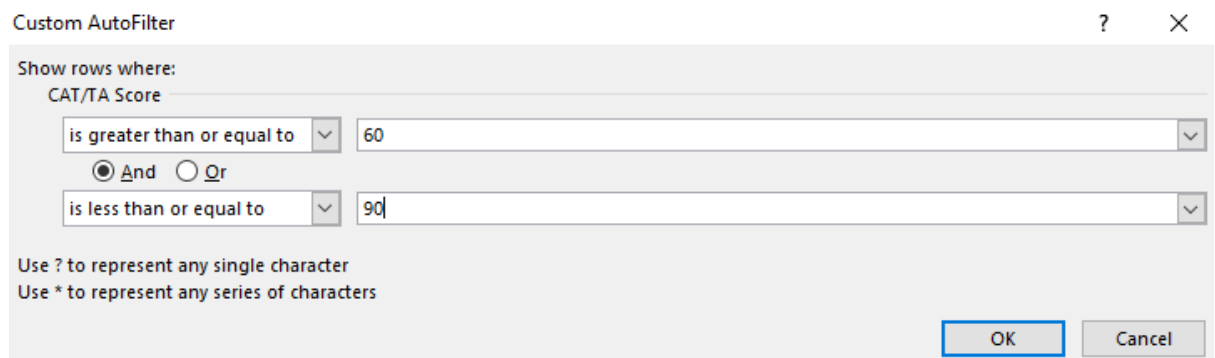
3. Once you have the right number of worksheets, rename each of the sheets to correspond with each band name. You can do this by using your mouse to right-click on the worksheet, and selecting 'Rename':



- Return to your original 'Ranking List' worksheet where you will need to rank the children who qualify under each band. For example, if the CAT score for Band D applicants is between 60 and 90, you will need to filter the children in your original 'Ranking List' worksheet with a score between 60 and 90 and mark them as Band D.
- You can add a filter to the original worksheet by selecting the 'Data' menu and then 'Filter'. Select the filter drop down arrow on the 'CAT or TA score' column, highlight 'Number Filters' and then 'Between':



- Add the values to the pop up box and click 'OK':



- This will automatically select the children who qualify with a CAT score between 60 and 90. You can then add 'Band D' in the 'Band' column for all children who are filtered:

Application Reference	Band	Criteria	Position	CAT/TA Score
204-2023-09-E-000022	Band D			81
204-2023-09-E-000026	Band D			78
204-2023-09-E-000098	Band D			73
204-2023-09-E-000125	Band D			88
204-2023-09-E-000134	Band D			87
204-2023-09-E-000141	Band D			88
204-2023-09-E-000154	Band D			87
204-2023-09-E-000187	Band D			80
204-2023-09-E-000209	Band D			88
204-2023-09-E-000218	Band D			88
204-2023-09-E-000248	Band D			86

8. You will then need to repeat this step to select the children who qualify using the TA score. For example, if the TA score for Band D applicants is between 0 and 5, you will need to filter the children in your original 'Ranking List' worksheet with a score between 0 and 5. Select the filter drop down arrow on the 'CAT/TA score' column, highlight 'Number Filters' and then 'Between':

The screenshot shows the Excel interface with the 'DATA' tab selected. The 'Filter' button is highlighted in the ribbon. A dropdown menu is open for the 'CAT/TA Score' column, showing 'Number Filters' selected. The 'Between...' option is highlighted in the sub-menu. The worksheet below shows columns for Application Reference, Band, Criteria, Position, CAT/TA Score, and Surname.

9. Add the values to the pop up box and click 'OK':

The screenshot shows the 'Custom AutoFilter' dialog box. The 'Show rows where:' section is set to 'CAT/TA Score'. The first condition is 'is greater than or equal to' with the value '0'. The second condition is 'is less than or equal to' with the value '5'. The 'And' radio button is selected. The 'OK' button is highlighted.

10. This will automatically select the children who qualify with a TA score between 0 and 5. You can then add 'Band D' in the 'Band' column for all children who are filtered:

Application_Reference	Band	Criteria	Position	CAT/TA Score
204-2023-09-K-004396	Band D			3
206-2023-09-E-001459	Band D			4
204-2023-09-E-002160	Band D			2
204-2023-09-E-001784	Band D			5
204-2023-09-E-000911	Band D			4
211-2023-09-E-004271	Band D			5
211-2023-09-E-004375	Band D			5
211-2023-09-E-001264	Band D			5
204-2023-09-E-002889	Band D			3
309-2023-09-E-000622	Band D			5
211-2023-09-E-005314	Band D			4

11. Repeat the filtering step for all bands and scores in your original ranking list. Once you are finished, you should check to see if there are any children without a band. You can do this by using the filter on the 'Band' column to see if there are any 'Blanks':

The screenshot shows a filter menu for the 'Band' column. The filter is set to 'Blanks'. The background shows a list of children with their application references, bands, criteria, positions, and CAT/TA scores.

Application_Reference	Band	Criteria	Position	CAT/TA Score
204-2023-09-E-001004	Band D			112
				108
				102
				118
				80
				99
				113
				90
				90
				118
				115
				95
				73
				83
				12
				102
				79

12. It is likely that the blanks will be children who do not have a CAT or TA score. You will need to ensure these children are assigned a band in line with your admission arrangements:

Application_Reference	Band	Criteria	Position	CAT/TA Score
204-2023-09-E-002139				
204-2023-09-E-000882				
204-2023-09-E-001240				

13. Once all children have been assigned a band, you can start working on assigning the criteria each child qualifies under. Please be aware of the following which will help you to rank each child:

- There are columns in the spreadsheet which confirm whether the child has an Education Health and Care Plan, is or was a Looked After child and/or has a Children Protection Plan. We have verified the status of these children with the relevant teams across Hackney Education, therefore if the status shows as 'Y' the child must be ranked accordingly. You can use the filter to select children who are 'Y'.
- There are columns in the spreadsheet which indicate where applicants have made a Social/Medical, Sibling and/or Staff claim. You must ensure you check whether these children qualify under these criteria in line with your admission arrangements and rank them accordingly. You can use the filter to select children who have a claim set as 'Y'.
- There is a free text column where applicants have given additional reasons for expressing a preference at your school/academy. You are advised to read these reasons. You can filter the children with additional reasons by unticking the 'Blanks'.
- Each child can only be assigned ONE criteria. If they qualify for more than one criterion, you should rank the child using the highest criteria that they qualify for.

14. Enter the qualifying criteria for each child. If there are a high number of children who qualify under the same criteria, you can also copy and paste the criteria to the relevant children. Please be aware that the criteria entered must **exactly** match the name of the criteria that is shown in the 'Criteria' tab of your master spreadsheet. If the criteria you enter for a child does not match the name of a criteria in SAM an error will occur when trying to import the information.

	A	B	C	D	E
	Application Reference	CAT or TA Score	Band	Criteria	Position
1	204-2024-09-E-002710	12			
2					

15. Once all children have been assigned criteria, you can start working on assigning the position number for each child. Please be aware of the following which will help you to position each child:

- Position numbers must reflect the order in which the children should be offered places, therefore those that meet the criteria best must be ordered first.
- Position numbers must also be ordered in line with the tie break set out in your admission arrangements. For example, if there are more applications than places available, children must be ordered within each criteria using the tie break, i.e. – distance. Please refer to your admissions arrangements. You can use the sort function to order the children by band, criteria and distance (or other tie break) if necessary.
- Position numbers must be in criteria order by band. For example, if there are 70 Band A applicants and 80 Band B applicants, you must order the children

in Band A from 1-70 and in Band B from 1-80. You can use the filter to order the children in each band.

- Late applicants must be ranked after all on time applicants. There is a column titled 'Late' which confirms whether the child is a late applicant.

16. Sort the spreadsheet by

- Band,
- Late,
- Criteria &
- Distance (or alternative tie breaker)

17. Enter the position number for each child in the 'Position' column:

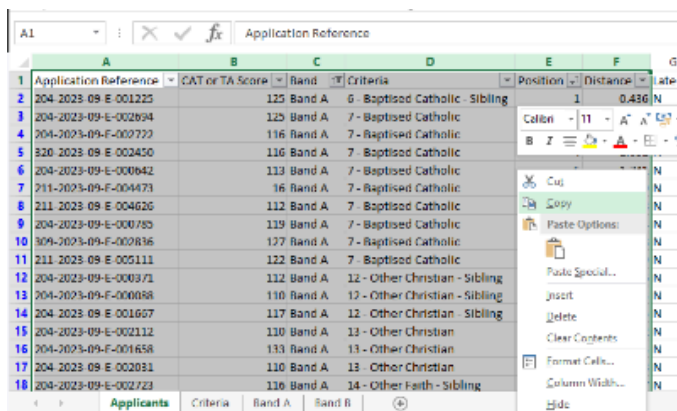
Application Reference	Band	Criteria	Position
309-2023-09-E-000805	Band A	1. EHCP	1
204-2023-09-E-001728	Band A	1. EHCP	2
204-2023-09-E-000098	Band A	2. LAC	3
204-2023-09-E-002112	Band A	3. CPP	4
204-2023-09-E-002204	Band A	4. Sibling	5
204-2023-09-E-000972	Band A	5. Staff	6
204-2023-09-E-002306	Band A	6. Distance	7
204-2023-09-E-000885	Band A	6. Distance	8
204-2023-09-E-002847	Band A	6. Distance	9
204-2023-09-E-001667	Band A	6. Distance	10
204-2023-09-E-001399	Band A	6. Distance	11

18. Check that every child now has a band, criteria and position assigned to them. You are also advised to carry out some checks on your rankings before preparing each list for import into SAM.

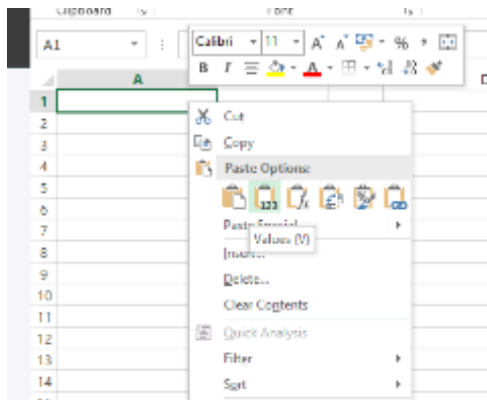
19. Once you are happy with your rankings, you can copy the data from your original ranking list to each of the Band worksheets you created at steps 1-3. Use the filter to select each band in turn.

20. Highlight and copy only the relevant columns to reduce the likelihood of import errors:

- Application Reference,
- Score,
- Band,
- Criteria
- Position
- Distance



21. Go to your Band A worksheet, right click on your mouse in cell A1 and select 'Paste values' to copy the data. Paste values will remove any formatting that may cause the import to error:

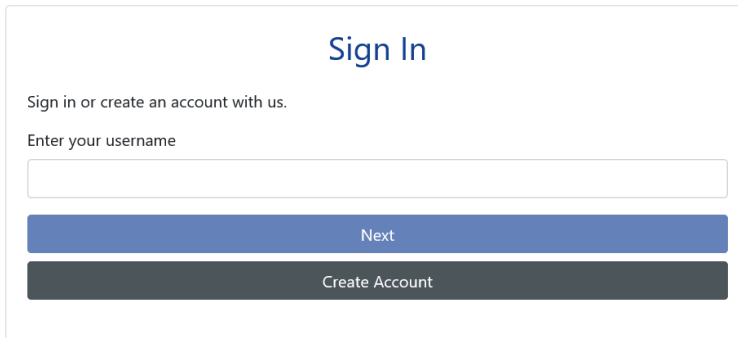


22. Repeat steps 19-21 for the remainder of your bands and save your final spreadsheet.

Accessing the SAM System

- ◆ To log in to SAM, click the following link:
<https://portal.learningtrust.co.uk/Synergy/Schools>

- ◆ Enter your school username and click Next:



Sign In

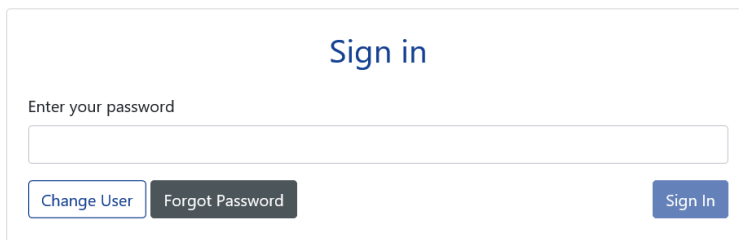
Sign in or create an account with us.

Enter your username

Next

Create Account

- ◆ Enter your password and click 'Sign In':



Sign in

Enter your password

Change User

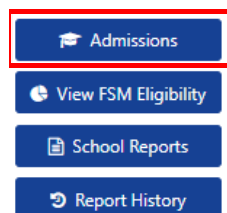
Forgot Password

Sign In

- ◆ Click the 'Admissions' button on the homepage:

School Access Module Home

Welcome to the School Access Module. Here you can manage School Admissions, view the Free School Meals Eligibility Report, and send referrals to your Local Authority.



- Using the drop down menu, select the relevant 'Secondary Transfer' round if you are a secondary school or the relevant 'Reception' round if you are a primary school then click 'Round Summary':

Admissions

Here you can view, manage and rank admissions applications. To view applications, use the drop down list below to select the Admissions Round, then press the Round Summary button.

Select a school:

Admissions Round:

→ Round Summary

⚙ Round Management

Importing your ranked list – schools using criteria only

Please click [here](#) if you are a school that uses bands **and** criteria.

In order to import the rankings, you must have the following columns - 'Application Reference Number', 'Position' & 'Criteria'. These columns must be in the spreadsheet or you will not be able to import it back into SAM.

1. Click on 'Import Rankings':

Round Summary

The screenshot shows the 'Round Summary' dashboard with the following sections:

- Preference Statistics:** Three panels showing 'Total Applications: 143', 'On Waiting List: 143', and 'Total Withdrawn: 0'. Each panel includes a donut chart for 'Prof 1: 31' at '21.7%'.
- Applicants:** A section with the text 'Performing an applicant query allows you to see a list of applicants to your school and rank them according to your admissions criteria.' and two buttons: 'View Rankings' and 'View Indicators'.
- Files:** A section titled 'Import and export files.' with a red box around the 'Import Rankings' button.
- Reports:** A section titled 'Predefined reports and adhoc querying.' with two buttons: 'View Leavers' and 'Query Preferences'.

2. Click on the 'Browse' button, navigate to your ranked list of applications and click on the 'Upload File' button:

Upload Ranking Positions File

Please select a file to be uploaded.

The 'Upload File' form consists of a blue header bar with the text 'Upload File'. Below it is a white input field labeled 'Choose file' with a 'Browse' button to its right. At the bottom center of the form is a blue 'Upload File' button.

3. Select the correct rankings worksheet from the 'Select Table' drop down menu. If SAM does not automatically find and display the corresponding column titles from the selected worksheet for 'Application Reference Number', 'List Position' and 'Criteria' drop down menus; the corresponding column titles must be manually selected from the drop down menus. Once all fields are complete, click 'Validate Uploaded Applicants':

Import Ranking Positions

Please map the necessary information to the uploaded file.

The 'Import Selected File' form has a blue header bar with the text 'Import Selected File'. It contains five dropdown menus for mapping information:

- Select Table: School X Ranking List
- Select Application Reference Column: Application_Reference
- Select List Position Column: Position
- Select Criteria Column: Criteria
- Select Distance Column: Distance

At the bottom of the form are two buttons: 'Validate Uploaded Applicants' (blue) and 'Start Again' (yellow).

4. If the validation is unsuccessful, the following message will be displayed and you will be informed of the Application Reference(s) of the children that failed validation. You must fix any failed records in your spreadsheet before you can attempt validation again:

Validation Failed - Records have failed validation, please see details below.

Import Ranking Positions

Please map the necessary information to the uploaded file.

Import Selected File

Select Table

Select Application Reference Column

Select List Position Column

Select Criteria Column

Select Distance Column

The following records failed validation and must be corrected before the file can be imported:

App Ref	Error
204-2023-09-E-000467	No preference exists for pupil reference 336528.

5. If the validation is successful, the following message will be displayed. You can then select 'Import':

Validation Successful - All records were successfully validated. Please click the Import button below to import them to the database.

Import Ranking Positions

Please map the necessary information to the uploaded file.

Import Selected File

Select Table

Select Application Reference Column

Select List Position Column

Select Criteria Column

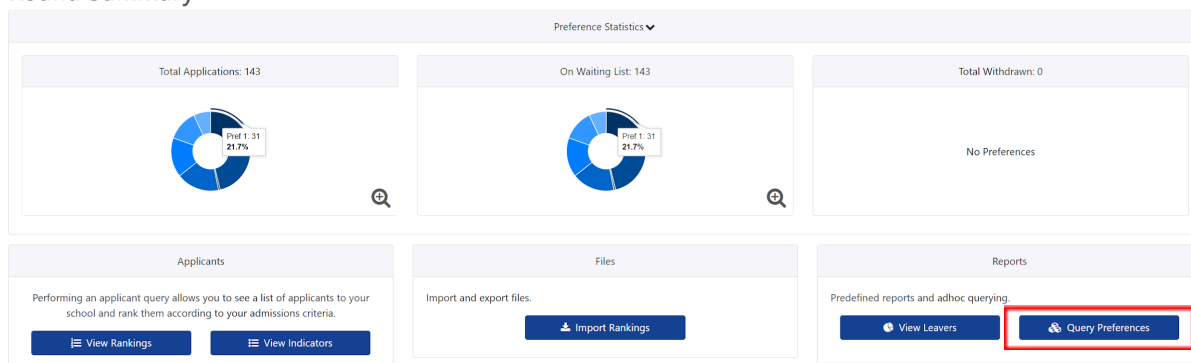
Select Distance Column

6. If the import is successful, the following message will be displayed:

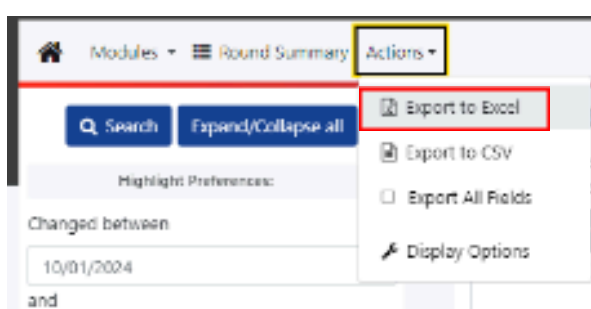
Import Successful - Records were successfully imported with no errors. Please ensure that you check the imported data.

7. To check that the rankings have been imported as expected, click on 'Round Summary' then 'Query Preferences'.

Round Summary



8. Select the 'Export to Excel' option from the 'Actions' drop down menu:

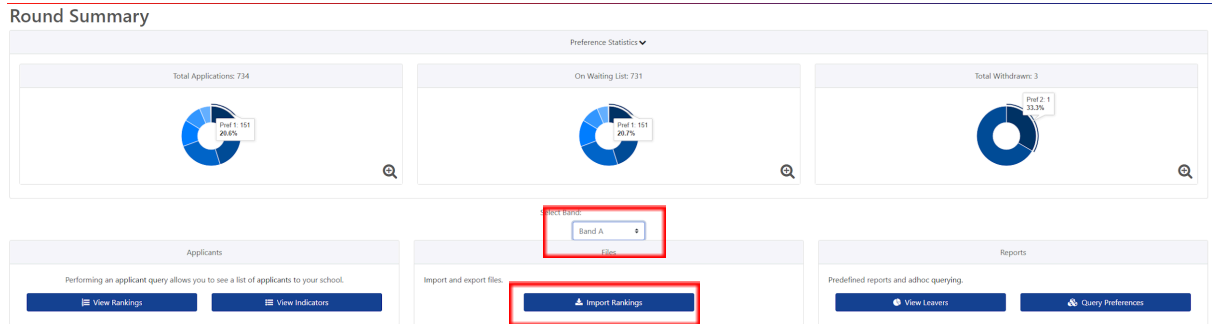


9. This will export a list of all the children in the round including their rankings if applicable. You can carry out some spot checks to make sure the ranking is as expected, in line with your spreadsheet.

Importing your ranked lists – schools using bands and criteria

In order to import the rankings, you must have the following columns - 'Application Reference Number', 'Position' & 'Criteria'. These columns must be in the spreadsheet or you will not be able to import it back into SAM.

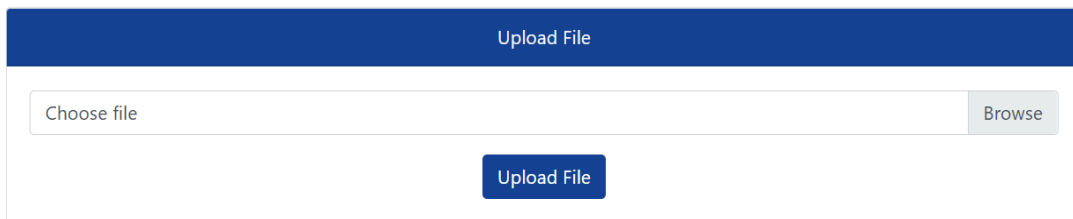
1. Select the first band from the list and click on 'Import Rankings':



2. Click on the 'Browse' button, navigate to your ranked list of applications and click on the 'Upload File' button:

Upload Ranking Positions File

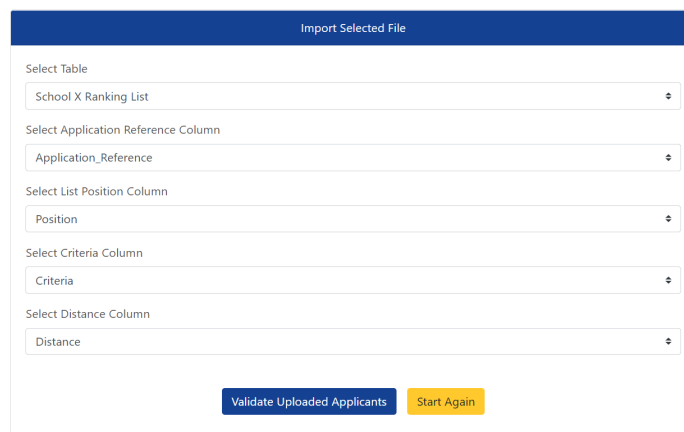
Please select a file to be uploaded.



3. Select the relevant band worksheet from the 'Select Table' drop down menu. If SAM does not automatically find and display the corresponding column titles from the selected worksheet for 'Application Reference Number', 'List Position' and 'Criteria' drop down menus; the corresponding column titles must be manually selected from the drop down menus. Once all fields are complete, click 'Validate Uploaded Applicants':

Import Ranking Positions

Please map the necessary information to the uploaded file.



- If the validation is unsuccessful, the following message will be displayed and you will be informed of the Application Reference(s) of the children that failed validation. You must fix any failed records in your spreadsheet before you can attempt validation again:

Validation Failed - Records have failed validation, please see details below.

Import Ranking Positions

Please map the necessary information to the uploaded file.

Import Selected File

Select Table

Select Application Reference Column

Select List Position Column

Select Criteria Column

Select Distance Column

The following records failed validation and must be corrected before the file can be imported:

App Ref	Error
204-2023-09-E-001791	The criteria 'LAC' was not found in the database.
204-2023-09-E-002144	The criteria 'LAC' was not found in the database.

- If the validation is successful, the following message will be displayed. You can then select 'Import':

Validation Successful - All records were successfully validated. Please click the Import button below to import them to the database.

Import Ranking Positions

Please map the necessary information to the uploaded file.

Import Selected File

Select Table

Select Application Reference Column

Select List Position Column

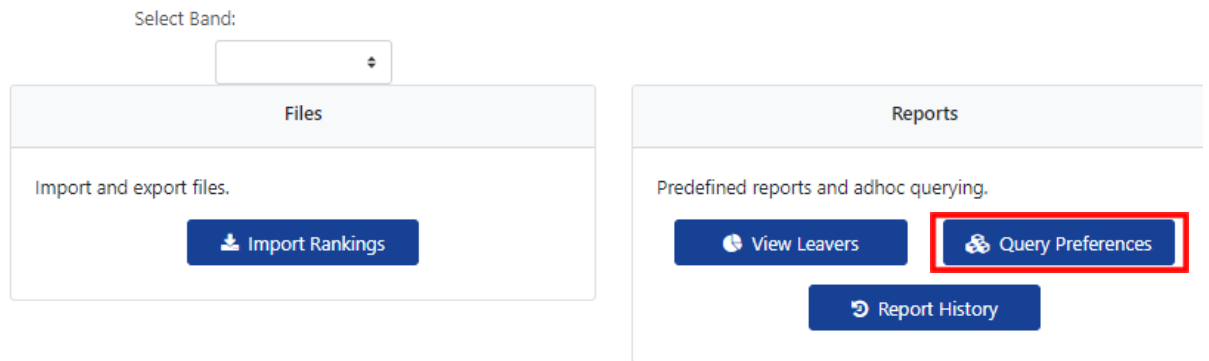
Select Criteria Column

Select Distance Column

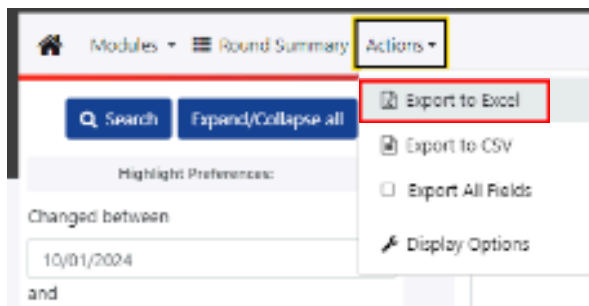
- If the import is successful, the following message will be displayed:

Import Successful - Records were successfully imported with no errors. Please ensure that you check the imported data.

7. To check that the rankings have been imported as expected, click on 'Round Summary' then 'Query Preferences'. **DO NOT** select a band to ensure you get the full list of applicants:



8. Select the 'Export to Excel' option from the 'Actions' drop down menu:

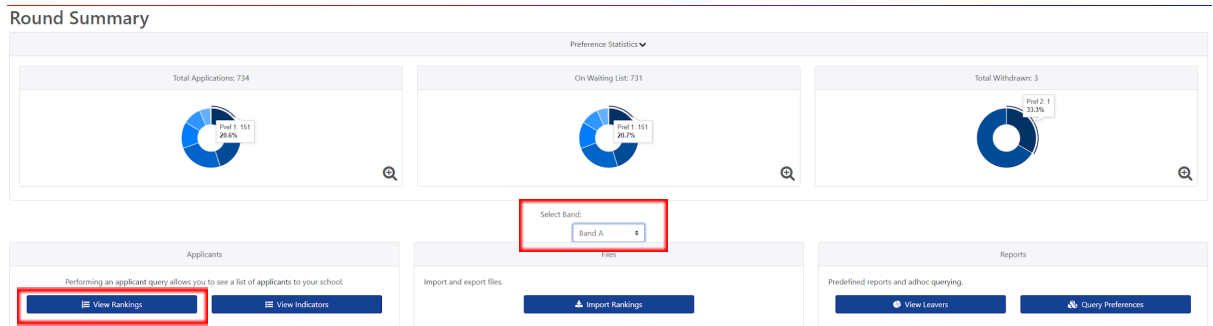


9. This will export a list of all the children in the round including their rankings if applicable. You can carry out some spot checks to make sure the ranking is as expected, in line with your spreadsheet.

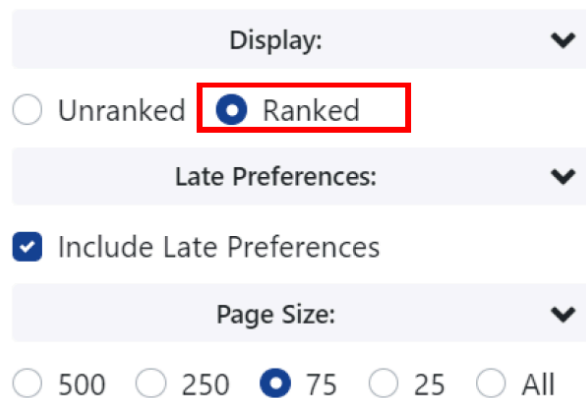
Removing and updating rankings in SAM

If you find that you have made an error with the rankings or there are children who are still left unranked, you can remove the rankings and re-import them again. To update the imported rankings, you will first need to amend the Excel spreadsheet(s) so that they are correct. Once this is done, you can then reload the rankings by following the steps below:

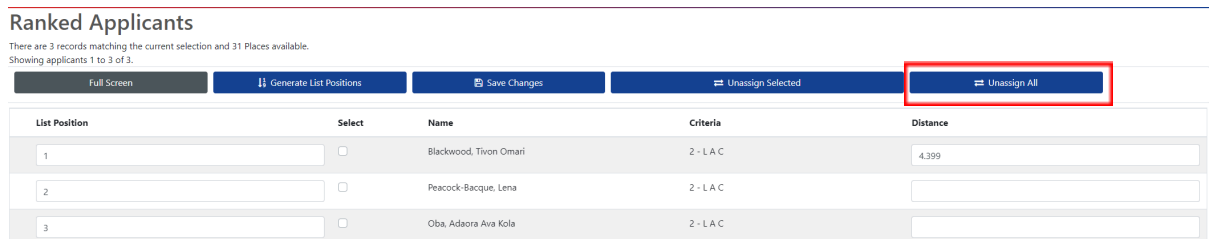
1. On the 'Round Summary' screen, select the 'Band' (if applicable) and click 'View Rankings'.



2. On the left hand side of the page choose the 'Ranked' radio button:



3. This will show you a list of all the children who are currently ranked. Click on 'Unassign All' button:



List Position	Select	Name	Criteria	Distance
1	<input type="checkbox"/>	Blackwood, Tivon Omari	2 - L A C	4,399
2	<input type="checkbox"/>	Peacock-Bacque, Lena	2 - L A C	
3	<input type="checkbox"/>	Oba, Adaora Ava Kola	2 - L A C	

4. Click on 'Confirm Unassign All' when presented with the following message:

Please confirm you wish to remove the list position and criteria of **all** applicants:

Confirm Unassign All

Cancel

5. This will remove all ranking information. You will then need to go repeat the steps outlined in the following instructions:
 - [Importing your ranked list – schools using criteria only](#)
 - [Importing your ranked list – schools using bands and criteria](#)