

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://synergy.hackney.gov.uk/Synergy/Schools using your school username and password:

Sign In	
Sign in or create an account with us.	
Enter your username	
0]
You must enter a username to continue	
Next	
Create Account	
	-

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 'SAM Report - Secondary Transfer Rankings' or 'SAM Report - Reception Rankings' from the report drop down menu:

Working for every child	H Hackney
	Cancel Run Report
Format *	SAM Report - Secondary Transfer Rankings
E-much th	SAM Report - Reception Rankings
Report *	•
School Reports	×

 Select 'Microsoft Excel Spreadsheet' from the format drop down menu and tick the 'Open report after creation' button:



• 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 <u>here</u> 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 that 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 that 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.



- 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:



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. Each child's random number is also included in the report in case this is needed for your tie break.
- 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 🤅 🤆	D)	

- 6. Highlight and copy the relevant columns from your master spreadsheet to your new import tab to reduce the likelihood of import errors:
 - a. Application Reference
 - b. Criteria
 - c. Position
 - d. Distance



	Α	В	С	D	Segoe UI - 10 - A*	1 CC -
1	Application F -	Criteria 🚽	Position -	Distance	p r = /b · A	
2	204-2023-09-E-	1-EHCP	1	1.055	P 1 = 2 . H	
3	204 2023 09 E	1 - EHCP	2	1.159	NI R	a-dulaahi
4	204-2023-09-E-	2 - L A C	3	0.815	or Cot	tullah
5	204-2023-09-E-	Z-LAC	4	2.137	LA COPY	fur Rahn
6	204-2023-09-E-	3 - Sibling	5	0.039	R. Parte Options:	
7	204-2023-09-E-	3 - Sibling	6	0.205	A Contraction	nah
8	204-2023-09-E-	3 - Sibling	7	0.277		a Smith
9	204-2023-09-E-	3 - Sibling	8	0.39	Paste Special	te
10	204-2023-09-E-	3 - Sibling	9	0.412	-	elai
11	204-2023-09-E-	3 - Sibling	10	0.442	Insert	i i
12	204-2023-09-E-	3 - Sibling	11	0.779	Delete	yne

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:

clipboard	5		Font	18 I
A1	• =	Cali	bri - 11 - A' A' 😳 -	% , 🖸
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1				_
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9			Delete	
10			Clear Contents	
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12		徳	Quick Analysis	
13			Filter	F
14			Sgrt	F.

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	٣	Criteria	۳	Position	•	CAT/TA Score	r
204-2023-09	-E-001196								11	2
204-2023-09	-E-001326								10	8
316-2023-09	-E-004012								10	2
204-2023-09	-E-002369								11	8
204-2023-09	-E-001782								8	0
309-2023-09	-E-000805								9	9
204-2023-09	-E-000862								11	3
204-2023-09	-E-000488								9	0
204-2023-09	-E-001728								9	0
204-2023-09	-E-000688								11	8
204-2023-09	-E-002912								11	5
204-2023-09	-E-001140								9	5
204-2023-09	-E-000098								7	3
211-2023-09	-E-005484								8	3
204-2023-09	-E-000754								1	2
204-2023-09	-E-001228								10	2
204-2023-09	-E-001664								7	9
\leftarrow \rightarrow	School X R	an	king L	ist	Scho	ool	X Criteria		\oplus	

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:

School X Ranking Lis	t Sheet4	Sheet5	Sheet6	Sheet7	School X Criteria	\oplus

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':

_								
				Insert				
			8	Delete				
				<u>R</u> ename				
				Move or Copy				
			ā	View Code				
				Protect Sheet				
				<u>T</u> ab Color	F			
				<u>H</u> ide				
				<u>U</u> nhide				
Scho	ol X Ranking	List S	heet4	Select All Sheets	Sheet7	School X C	riteria	(+



- 4. 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.
- 5. 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':

2		5	¢	÷								School X	(- Ranking Lis	t - Exc
	FILE	HOME	INSERT	PAG	GE L/	AYOUT	FORMUL	AS	DATA	RE	VIEW	VIEW	ACROBAT	
iet	External Data -	Refresh All •	Con	nections verties Links		2↓ X↓	ZAZ Sort	Filter	illter	Clear Reappl Advance	y :ed	Text to Columns	Flash Fi	II e Dupl lidatio Da
D	149	•	\times	f _x		204-2023-	09-E-000	896						
		D		E		F	G		н			J		
1	Applicati	on_Refe	rence 💌	Band 💌	r Cr	riteria 💌	Position	▼ CA	T/TA Sco	re 🔻	Surna	me		۳F
2	204-2023	-09-E-00	1196	2	à↓	Sort Smalle	st to Large	st			Abdul	lah		N
3	204-2023	-09-E-00	1326	2	KL.	Sort Larges	t to Smalle	st			Abrah	am		E
4	316-2023	-09-E-00	4012	· · · · · · · · · · · · · · · · · · ·		Sort by Col	or				Adam	ek		Z
5	204-2023	-09-E-00	2369		_	JOIL DY COI	01			r	Adejo	bi		N
6	204-2023	-09-E-00	1782	· · · ·	×	<u>C</u> lear Filter	From "CA"	T/TA So	ore"		Adeko	oya		S
7	309-2023	-09-E-00	0805			Filter by Co	lor			- F.	Adere	mi		N
8	204-2023	-09-E-00	0862			Number <u>F</u> il	ters			•	E	quals		A
9	204-2023	-09-E-00	0488			Search				0	D	oes Not Equa	al	Т
10	204-2023	-09-E-00	1728			Search				~				A
11	204-2023	-09-E-00	0688			✓ (Sele	ect All)			^	<u>0</u>	reater Inan		C
12	204-2023	-09-E-00	2912								G	reater Than <u>(</u>	<u>O</u> r Equal To	J
13	204-2023	-09-E-00	1140			🗹 3				~	Ŀ	ess Than		Α
14	204-2023	-09-E-00	0098								L	ess Than Or E	gual To	J
15	211-2023	-09-E-00	5484				OK	1	Cance	el	В	et <u>w</u> een		N
16	204-2023	-09-E-00	0754					-		.:	т			N
17	204-2023	-09-E-00	1228		_					102	1	op 10		Ji
18	204-2023	-09-E-00	1664		١.					79	A	bove Averag	e	L
	< >	Sch	ool X Ran	king Lis	st	Band A	Band	3 E	Band C	Ban	В	el <u>o</u> w Average	e	÷

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

Custom AutoFilter		?	×
Show rows where: CAT/TA Score			
is greater than or equal to <u>And</u> O <u>O</u> r			~
is less than or equal to 90			~
Use ? to represent any single character Use * to represent any series of characters			
	ОК	Car	ncel

7. 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	.T
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':

X			5	¢	Ŧ								School X	- Ranking List	- Exc
I	FILE	НО	ME	INSERT	P	AGE I	LAYOUT	FORMUL	AS.	DATA	RE	VIEW	VIEW	ACROBAT	
jet [External Data =	Ref	fresh	Con	nectior verties Links	15	₽↓ Z↓	Z A A Z Sort	Filter	ilter	Clear Reapply	/ :ed	Text to Columns	Flash Fil Remove Data Vali	l Dup datic Da
D1	.49		1 :	×	/ 1	r x	204-2023	-09-E-000	896						
			D		E		F	G		н			J		
1	Applica	ation	Refe	rence 💌	Band	- (Criteria 💌	Position	▼ CA	T/TA Sco	re 🔻	Surna	ne		▼ F
2	204-20	23-09	-E-001	196		ĄĻ	Sort Small	est to Large	est			Abdul	lah		P
3	204-20	23-09	-E-001	1326		Z	Sort Large	st to Smalle	et.			Abrah	am		E
4	316-20	23-09	-E-004	1012		A4	Cost hu Co	lee				Adam	ek		7
5	204-20	23-09	-E-002	2369			Sor <u>t</u> by Co	IOF			,	Adejo	bi		P
6	204-20	23-09	-E-001	1782		×	Clear Filter	From "CA	T/TA So	ore"		Adeko	ya		5
7	309-20	23-09	-E-000	0805			Filter by C	olor			÷	Adere	mi		1
8	204-20	23-09	-E-000	0862			Number <u>F</u>	ilters			►	E	uals		Ļ
9	204-20	23-09	-E-000	0488			Ceaseb				0	D	oes Not Equa	ı	T
10	204-20	23-09	-E-001	1728			Search				~	-			- 4
11	204-20	23-09	-E-000	0688			Sel	ect All)			^	<u>G</u>	reater Inan		C
12	204-20	23-09	-E-002	2912			2					G	reater Than <u>(</u>	<u>)</u> r Equal To	J
13	204-20	23-09	-E-001	140			🖌 3				~	Le	ess Than		4
14	204-20	23-09	-E-000	0098							_	Le	ess Than Or E	gual To	J
15	211-20	23-09	-E-005	5484				O	<	Cance	el	B	etween		
16	204-20	23-09	-E-000	0754		_					.:	т	an 10		-
17	204-20	23-09	-E-001	1228							102	10			J
18	204-20	23-09	-E-001	1664					_		79	A	bove Averag	e	L
	4 ►		Scho	ool X Ran	king l	.ist	Band A	Band	BE	Band C	Ban	B	el <u>o</u> w Average	2	Ð

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

Custom AutoFilter		?	×
Show rows where: CAT/TA Score			
is greater than or equal to 🗸	0		\sim
is less than or equal to 🗸 🗸	s		\sim
Use ? to represent any single characte Use * to represent any series of charac	ters		
	ОК	Canc	el



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:

	-			
Band 💌	Criteria	٣	Position _	CAT/TA Score 🖵
Band D				3
Band D				4
Band D				2
Band D				5
Band D				4
Band D				5
Band D				5
Band D				5
Band D				3
Band D				5
Band D				4
	Band V Band D Band D	Band Criteria Band D Band D	Band V Criteria V Band D Band D	Band Criteria Position Band D Band D

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':

1	Application_Reference 💌 Band 💌 Criteria 💌	Position	CAT/TA Score 💌
₽↓	Sort A to Z		112
Ă↑	S <u>o</u> rt Z to A		108
	Sort by Color		102
₹.	<u>C</u> lear Filter From "Band"	_	118
	Filter by Color		99
	Text <u>F</u> ilters	•	113
	Search 0		90
			90
	E (Select All)		118
	Band A		115
	Band C		95
	Band D		73
	····· 🗹 (Blanks)		83
			12
	OK Cancel		102
10	204-2023-03-E-001004 Dalla D		79
	School X Ranking List Band A	A Band B	Band C Band

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 that 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 that 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.



- 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. Each child's random number is also included in the report in case this is needed for your tie break.
 - 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
 - a) Band,
 - b) Late,
 - c) Criteria &
 - d) 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

AJ	X	✓ fx Applica	tion Refe	rence			
	A	В	C	D	E	F	:
1	Application Reference	 CAT or TA Score	Band 1	Criteria 💌	Positio	n 🖃 Distan	ce 🕑 Lat
2	204-2023-09-E-001225	125	Band A	6 - Baptised Catholic - Sibling		1	0.436 N
	204-2023-09-E-002694	125	Band A	7 - Baptised Catholic	Calibri	- 11 -	A* A* 🔄
ŧ.	204-2023-09-E-002722	116	Band A	7 - Baptised Catholic	8.7	$= \Delta \cdot$	A - El -
1	320-2023-09-E-002450	116	Band A	7 - Baptised Catholic		=	
5	204-2023-09-E-000642	113	Band A	7 - Baptised Catholic	х.		N
7	211-2023-09-E-004473	16	Band A	7 - Baptised Catholic	9 C	u);	N
8	211-2023-09-E-004626	112	Band A	7 - Baptised Catholic	20 2	opy	N
•	204-2023-09-E-000785	119	Band A	7 - Baptised Catholic	i B B	aste Options:	N
0	309-2023-09-E-002836	127	Band A	7 - Baptised Catholic	-	2	N
1	211-2023-09-E-005111	122	Band A	7 - Baptised Catholic			N
2	204-2023-09-E-000371	112	Band A	12 - Other Christian - Sibling	P	iste Special	N
3	204-2023-09-E-000088	110	Band A	12 - Other Christian - Sibling	jn jn	sert	N
4	204-2023-09-E-001667	117	Band A	12 - Other Christian - Sibling	D	elete	N
5	204-2023-09-E-002112	110	Band A	13 - Other Christian	1 2	and Constants	N
6	204-2023-09-E-001658	133	Band A	13 - Other Christian	~	ear colliterits	N
17	204-2023-09-E-002031	110	Band A	13 - Other Christian	E 6	armat Cells	N
18	204-2023-09-E-002723	110	Band A	14 - Other Faith - Sibling	9	olumn Width.	N
	Applicants	Criteria Bandu	A Band	18 (4)	н	ide	

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:



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A1	* i	Cali	bri - 11 - A* A* 💱	- % , 🖸
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1				
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9			Delete	
10			Clear Contents	
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13			Filter	+
14			Sget	F

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: <u>https://synergy.hackney.gov.uk/Synergy/Schools</u>
- 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:		
Clapton Girls' Academ	Ŋ	\$
Admissions Round:		
Secondary Transfer 20	25	\$
	→ 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						
	Preference Statistics 🗸					
Total Applications: 143	On Waiting List: 143	Total Withdrawn: 0				
Ref 1.31 2175	Pret 1.31 2179 CQ	No Preferences				
Applicants	Files	Reports				
Performing an applicant query allows you to see a list of applicants to your school and rank them according to your admissions criteria.	Import and export files.	Predefined reports and adhoc querying.				

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.		
	Upload File	
Choose file		Browse
	Upload File	

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 Selected File	
Select Table	
School X Ranking List	
elect Application Reference Column	
Application_Reference	
elect List Position Column	
Position	
ielect Criteria Column	
Criteria	
elect Distance Column	
Distance	



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.		
mport Ranking Positions lease map the necessary information to the uploaded file.		
	Import Selected File	
Select Table		
Table		¢
Select Application Reference Column		
AppRef		
Select List Position Column		
Position +		
Select Criteria Column		
Criteria		¢
Select Distance Column		
Distance		\$
Validate Uploaded Applicants Start Again The following records failed validation and must be corrected before the file can be imported: File Content of Content		
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 succe	essfully validated. Please click the Import button below to import them to database.	the
Import Ranking Posi	itions _{aaded file.}	
	Import Selected File	
Select Table		
Table		\$
Select Application Reference Column		
AppRef		\$
Select List Position Column		
Position		¢
Select Criteria Column		
Criteria		\$
Select Distance Column		
Distance		¢
	Import Start Again	

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

	Preference Statistics 🗸	
Total Applications: 143	On Waiting List: 143	Total Withdrawn: 0
Pre 1.31 27%	Pret: 31 2175	No Preferences
Applicants	Files	Reports
Performing an applicant query allows you to see a list of applicants to your school and rank them according to your admissions criteria.	Import and export files.	Predefined reports and adhoc querying.

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':

Round Summary		
	Preference Statistics 🗸	
Total Applications: 734	On Waiting List: 731	Total Withdrawn: 3
active state	975 151 975	
Applicants	There are a set of the	Reports
Performing an applicant query allows you to see a list of applicants to your school, I view Rankings III View Indicators	Import and export files.	Predefined reports and adhoc querying. Over Leavers 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.

	Upload File	
Choose file		Browse
	Upload File	

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.		

Import Selected File	
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	¢
Validate Uploaded Applicants Start Again	





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		
Table		\$
Select Application Reference Column		
AppRef •		¢
Select List Position Column		
Position +		
Select Criteria Column		
Criteria		\$
Select Distance Column		
Distance		\$
Validate Uploaded Applicants Start Again The following records failed validation and must be corrected before the file can be imported: File Content in the start of the sta		
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.	

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

mport Ranking Positions ease map the necessary information to the uploaded file.	
Import Selected F	le
Select Table	
Table	\$
Select Application Reference Column	
AppRef	\$
Select List Position Column	
Position	\$
Select Criteria Column	
Criteria	\$
Select Distance Column	
Distance	\$

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.



 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:

Select Band:	
\$	
Files	Reports
Import and export files.	Predefined reports and adhoc querying.
📥 Import Rankings	View Leavers & Query Preferences
	3 Report History

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'.

Round Summary				
	Preference Statistics 🗸			
Total Applications: 734	On Waiting List: 731	Total Withdrawn: 3		
Q	Carbon Strate St	Q		
Applicants	Select Bard. Eard A 9 Tees	Reports		
Performing an applicant query allows you to see a fast of applicants to your school.	Import and export files.	Predefined reports and adhoc querying. O View Leavers County Preferences		

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

Display:									~	
O Unranked O Ranked										
Late Preferences:									~	
Include Late Preferences										
Page Size:									~	
\bigcirc	500	0 2	50	0	75	\bigcirc	25	\bigcirc	All	

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

Ranked Applicants There are 3 records matching the current selection and Showing applicants 1 to 3 of 3.	31 Places available.				
Full Screen	🚦 Generate List Positions	Save Changes	🛱 Unassign Selected	≓ Unassign All	
List Position	Select	Name	Criteria	Distance	
1		Blackwood, Tivon Omari	2 - L A C	4.399	
2		Peacock-Bacque, Lena	2 - L A C		
3		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

