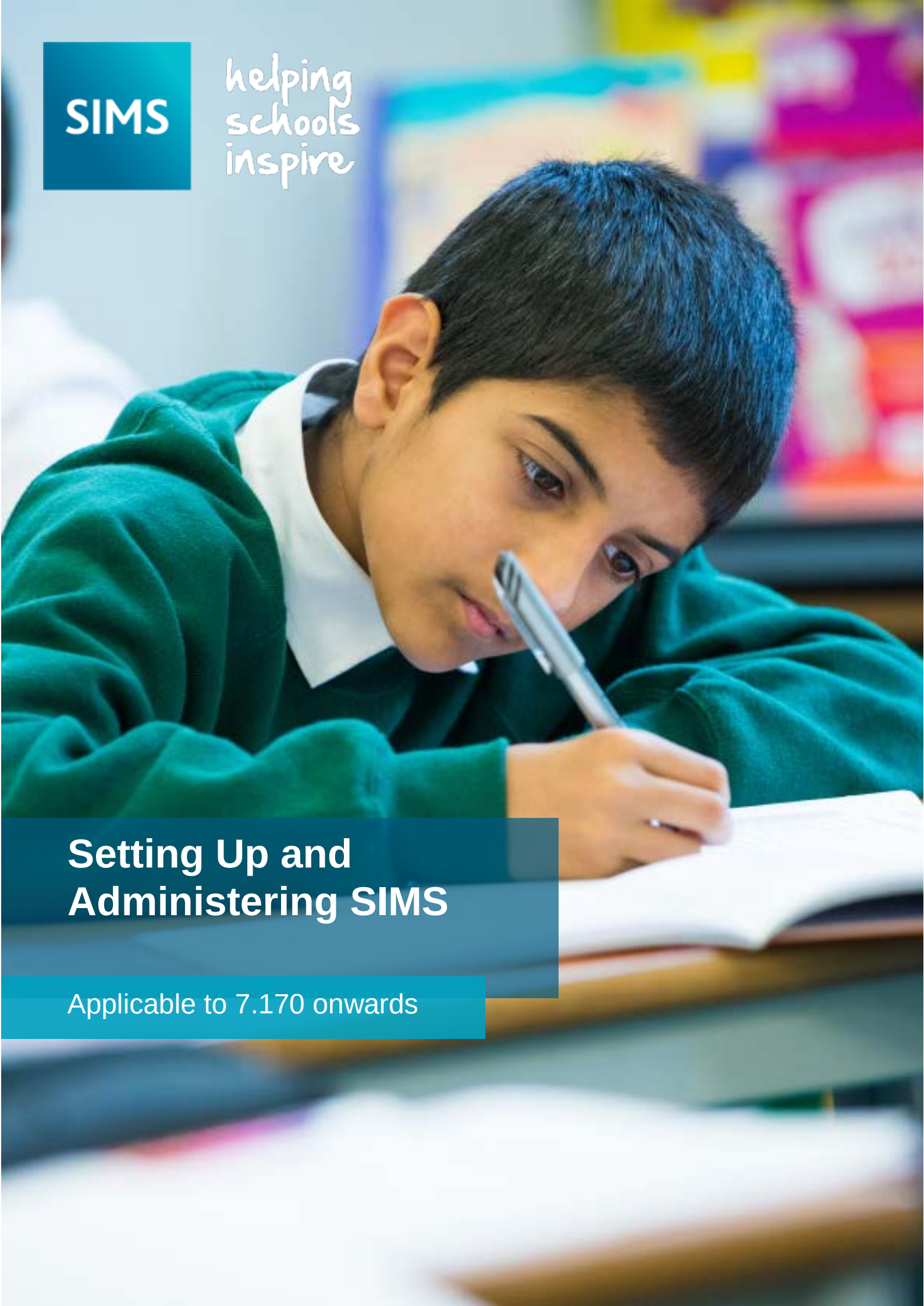
SIMS

helping schools inspire



Setting Up and Administering SIMS

Applicable to 7.170 onwards

Revision History

Version	Change Description	Date
7.170 - 1.0	Initial release.	09/06/2016

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Please ensure that you include the module name, version and aspect of documentation on which you are commenting.

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Overview

This handbook provides information on how to set up the various areas of SIMS in readiness for day-to-day use, such as setting up lookups (drop-down lists), creating academic years/admission groups, setting up behaviour management defaults, etc. It also covers the more complex processes that are likely to be carried out by a School/System Administrator.

What's New in this Release?

The following changes have been made in this release.

Addition of Lookups

Tools | Lookups | Maintain

The following lookups have been added in order to help maintain accurate Census returns:

- Proficiency in English
- Country of Birth
- Level of Study (for schools in Northern Ireland only).

More Information:
Importing and Maintaining Lookups on page *151*

Additional Information Included in CTF Imports and Exports for Schools in England

Routines | Data In | CTF | Import CTF
Routines | Data Out | CTF | Export CTF

In CTF version 16.0 onwards, new tags are now included in **General** CTF imports and exports for the following data:

- **Country of Birth** (**<CountryofBirth>**)
- **Proficiency in English** (**<ProficiencyInEnglish>**)
- **Nationality** (**<Nationality>**).

More Information:
Data Included in the CTF Files on page *237*

Additional Information Included in CTF Imports and Exports for Schools in Northern Ireland

Routines | Data In | CTF | Import CTF
Routines | Data Out | CTF | Export CTF

In CTF version 16.0 onwards, the **ULN Data Share** tag (**<ULNDataShare>**) is now included in **General** CTF imports and exports.

More Information:
Data Included in the CTF Files on page *237*

Additional Information Included in CTF Imports and Exports for Schools in Wales

Routines | Data In | CTF | Import CTF
Routines | Data Out | CTF | Export CTF

In CTF version 16.0 onwards, the **Country of Birth** tag (**<CountryofBirth>**) is now included in **General** CTF imports and exports.

More Information:
Data Included in the CTF Files on page *237*

Enhancements to User Defined Groups

Focus | Groups | User Defined Groups

The **Bulk Update End Dates** button has been added so that multiple group memberships can be set to end on a selected date.

It is now possible to view the **Total** and **Current** number of members in a group, and the **Latest membership** date in the **Maintain User Defined Groups** browser.

The **Selected Member** and **Selected Membership** fields have been added to the **Membership** panel.

The **Terminate selected membership(s) on effective date end**, **Extend selected membership(s) to effective date end** and **Extend membership(s) forever** options have been added to the **Action** drop-down list.

More Information:
Bulk Updating Membership End Dates on page *146*
Creating User Defined Groups on page *141*

Permissions and Licensing Requirements

Some Licence Activation Keys are required for certain functions outlined in this handbook. These are referred to in the specific handbook section and must be applied in order for the function to work.

A majority of the functions in this handbook required School Administrator permissions. Please contact your System Administrator if you are unsure whether you have the applicable permissions.

An Excel spreadsheet describing the numerous permissions available in SIMS is available on the My Account website (https://myaccount.capita-cs.co.uk). To find the spreadsheet, search for `<sims version> sims permissions spreadsheet`, e.g. `7.170 sims permissions spreadsheet`.

Additional Resources:

Managing SIMS Users, Groups and Databases handbook

Where to Find More Information

A wide range of documentation is available from within SIMS via the **Documentation Centre**. This documentation includes handbooks, mini guides, quick reference sheets, etc. and can be accessed by clicking the **Documentation** button on the SIMS **Home Page**. Once open, click the **Handbooks** button, select the required category, then select the required handbook from the **Handbooks** page.

References to any other documents mentioned in this handbook can be accessed from the **Documentation Centre** unless otherwise specified.

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

Additional supporting documentation can also be found on our My Account website (https://myaccount.capita-cs.co.uk). The most popular documents can be located by selecting **Knowledge Base**, **SIMS Publications** (located in the **Popular Searches** list) and then clicking the **Find** button. Alternatively, use the search facility on the My Account Home Page to display a list of all **Documents** containing the search criteria.

- Select the product you need help with to filter search results.
- Surround a phrase with double quotes to find that exact phrase.
- Prefix words with **+** to make them essential.
- Prefix words with **-** to exclude them from results.

Recording People in SIMS

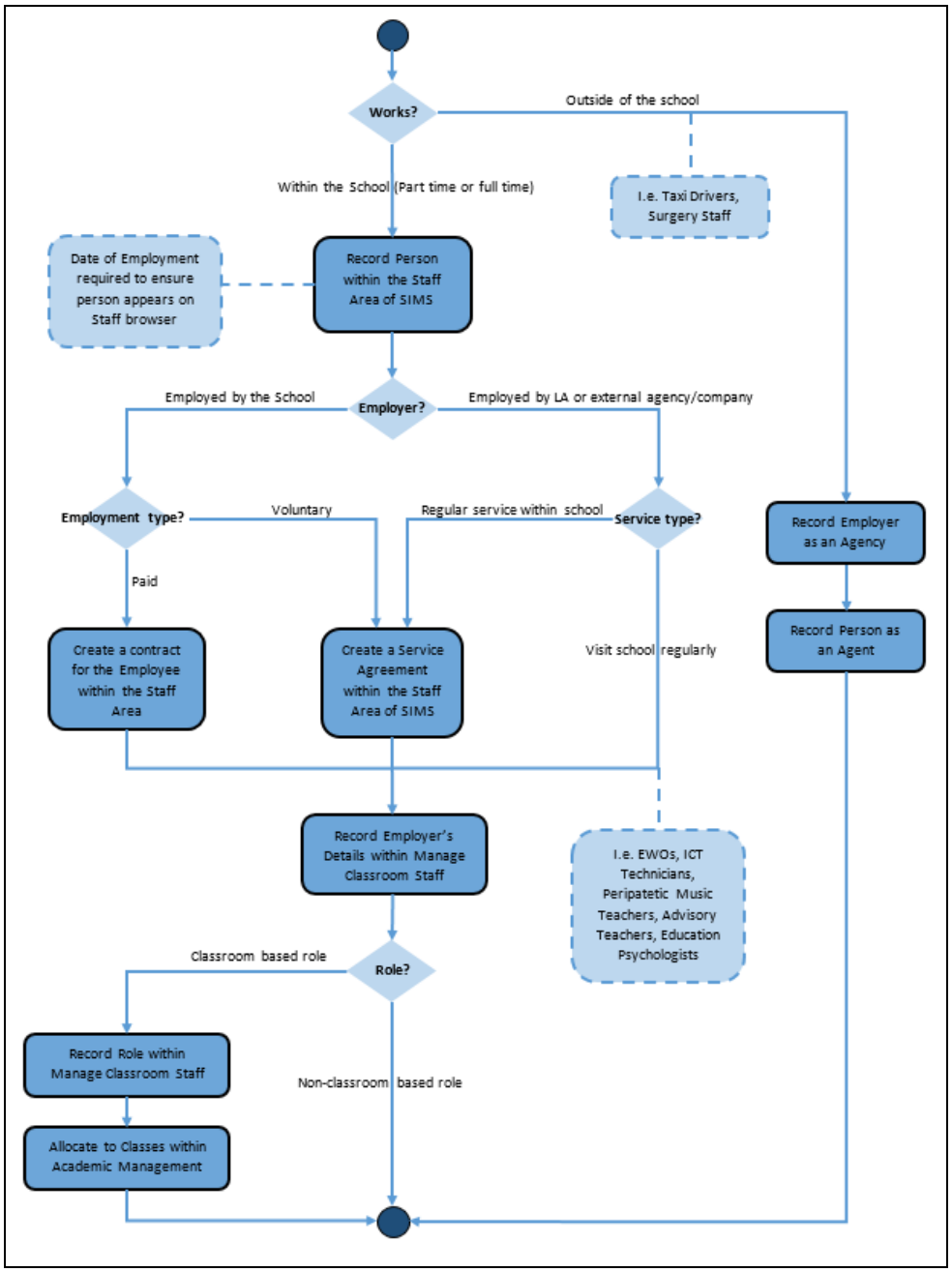
When adding a new person into SIMS, it is advisable to consider the type of role, function or data responsibilities that they will be required to undertake in the school before entering their details. These considerations will help you to determine which area of SIMS the person 'belongs' to, e.g. as a staff member, a pupil/student's contact, an agent for an external agency, etc.

The following table details the four main 'people' areas in SIMS:

Term	Definition	Menu Route
Employee	A person who has a contract of employment paid by the school, e.g. dinner lady, grounds man, etc. They are employed by the school and are included in the School Workforce Return.	**Focus | Person | Staff**
Staff	A person who has a contract of employment paid by the school. In SIMS, they are generally teachers, LSA's and TA's and are included in the School Workforce Return.	**Focus | Person | Staff** or **Manage Classroom Staff**
Agent	An individual who works for a recognised, external agency and who may have some involvement with a pupil/student, e.g. as a doctor, speech therapist, etc. They are not paid by the school and are not included in the School Workforce Return.	**Focus | Person | Agents**
Contact	Often a family member or a close friend of the pupil/student's family who can be contacted in the case of an emergency. They may also be former pupil/students or employees whose children attend the school in which they work. They are not paid by the school and are not included in the School Workforce Return.	**Focus | Person | Contacts**

Where an element of doubt or uncertainty exists, individuals who work within the school but are not employed by the school should be recorded as Agents in SIMS.

Please see the following flow chart for additional information.



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Introduction

This chapter describes the various setups that need to be carried out in order for functions to work correctly in SIMS. Some of these may have been completed when SIMS was first installed, but can be amended if necessary.

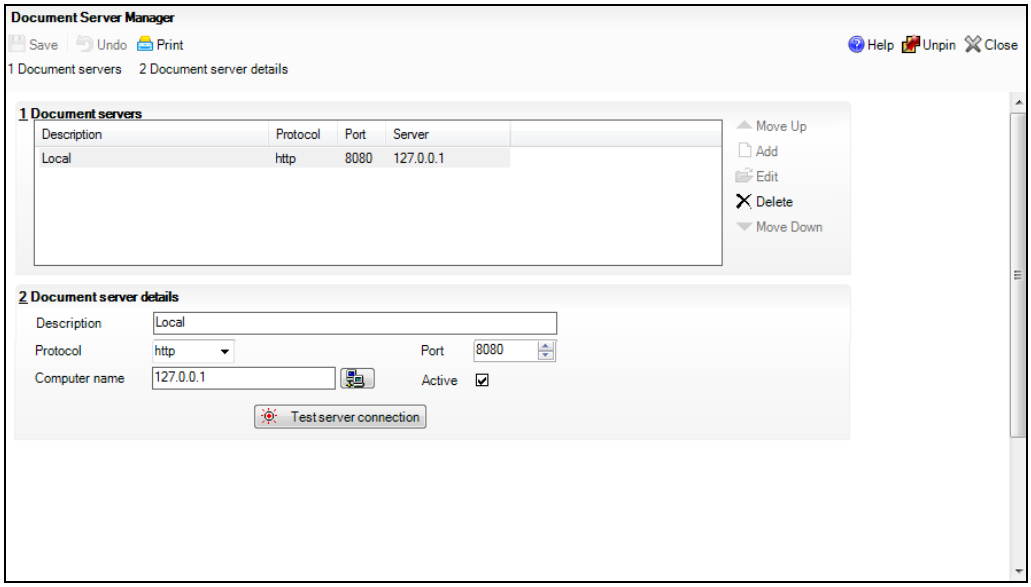
Setting up the Document Management Server

The Document Management Server (DMS) is a server used to manage the storage and retrieval of saved reports, SEN documents and any other documents available that are added to, and view from within SIMS.

The DMS is installed and set up when SIMS is first installed, either on the SIMS SQL Server or on a separate machine. Following installation, you will need to identify the location of the Document Management Server to be used and then test the connection.

> ***IMPORTANT NOTE:*** *It is only necessary to have one DMS (either on a standalone or network installation).*

Select **Tools | Setups | Document Management Server** to display the **Document Server Manager** page.



*NOTES: If you are using a standalone system and a DMS is already listed, this process has already been performed and you do not need to continue. Click the **Test server connection** button to ensure the DMS is working.*

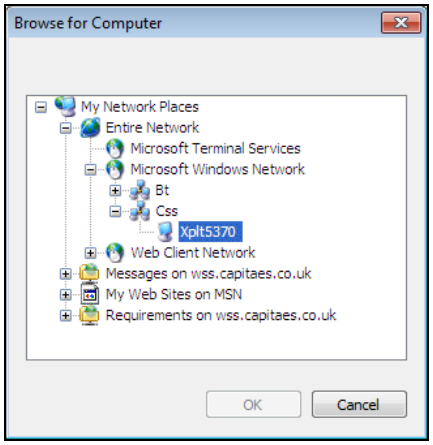
If the Document Management Server has been installed on the SIMS SQL Server, or on another server, and your machine is a SIMS Workstation (i.e. you are connected to a SIMS network), you need to add the DMS to SIMS as described in the remainder of these instructions.

Adding a New Document Management Server

Only one DMS can be added in the **Document servers** panel. If a DMS is already inserted, then the **Add** button adjacent to the **Document Servers** panel will be inactive.

1. On the **Document Management Server** page, click the **Add** button adjacent to the **Document Servers** panel. The **Document server details** panel is enabled.
2. Enter a **Description** for the DMS.
3. The **Protocol** field defaults to http and should not be edited.

4. Click the **Browser** button adjacent to the **Computer name** field to display the **Browse for Computer** dialog.



5. Navigate to the location of the DMS then click the **OK** button. The **Computer name** field is populated with the machine name/number.

   The **Port** field will be populated with a number between 0 and 65535, usually 8080. This will normally not need to be adjusted.

6. Ensure the **Active** check box is selected to indicate that the DMS is in use.
7. Click the **Save** button to save the DMS.

Testing the Server Connection

1. If you have just attached a DMS to SIMS, or if you are experiencing any problems with the DMS, click the **Test server connection** button to test the connection between your machine and the Server on which the DMS is installed.
2. A message dialog is displayed stating **Server OK**. Click the **OK** button to close the dialog.

Deleting a Document Management Server

You must have System Manager permissions to be able to use this function.

If a DMS has been added in error, or if the location of the DMS has changed, an existing DMS can be deleted.

1. Highlight the name of the DMS in the **Document Servers** panel and click the **Delete** button.
2. Click the **Save** button to save the deletion.

Tracking Data Changes in SIMS

This functionality enables the system to track the changes made to certain data recorded in your SIMS system and subsequently, to write checkpoints to a log. Third Party suppliers may make use of these checkpoints to populate their database(s) with any amended data that has been tracked.

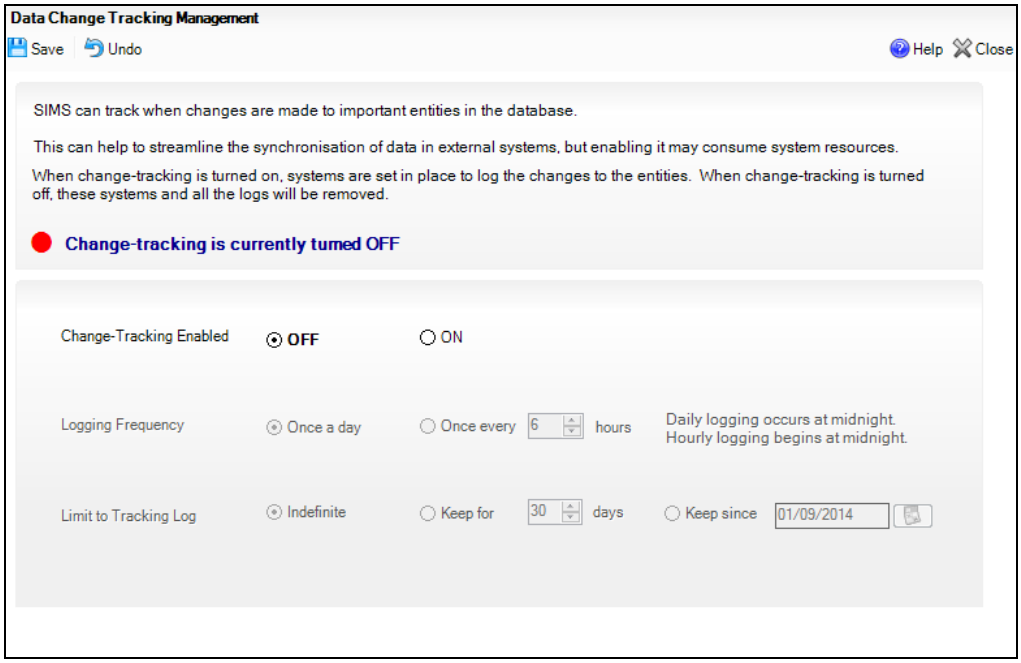
> ***IMPORTANT NOTE:*** *The log is implemented as a database table and is not a physical file on the hard drive.*

This process should be run only if you have a defined use for this functionality and if you have been advised to do so by one of your Third Party software suppliers.

WARNING: *Data change tracking may increase server activity and could potentially result in a reduction in performance of your SIMS SQL Server at peak times.*

NOTE: Enabling data change tracking is available only to users assigned to a user group with the Edit All Data Change Management permission (normally assigned to members of the System Manager user group).

1. Select **Tools | Setups | Data Change Management** to display the **Data Change Tracking Management** page.

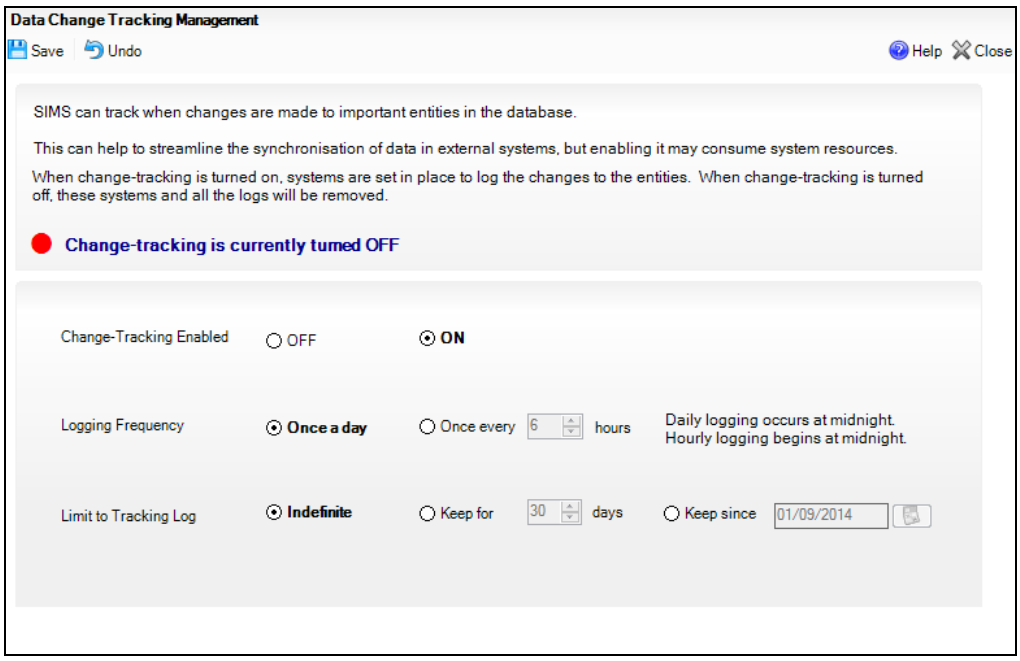


IMPORTANT NOTE: *The SQL component named Service Broker must be activated in order to use the change tracking functionality. This component is activated automatically as part of the SIMS upgrade process. If a message is displayed at the top of the screen informing you that Service Broker is not enabled, please follow the on-screen instructions to resolve this issue.*

The status of the change tracking process is displayed at the bottom of the first panel. If it is currently switched off, the **Change-Tracking Enabled** option in the second panel is set to **OFF**.

2. To enable the tracking of data changes in your SIMS system, select the **ON** radio button in the **Change-Tracking Enabled** section.

When the **ON** radio button is selected, the remaining options on the screen become available for editing. Only when you save the settings on this page does the active status change from **OFF** (accompanied by a red circle) to **ON** (accompanied by a green circle).



The **Logging Frequency** section indicates the frequency at which you wish to write change tracking information to the log.

3. Select the frequency that you wish to log any changes by selecting the appropriate radio button in the **Logging Frequency** section. The following options are available:

   - **Once a day** – writes any changes to the log at midnight each night, at which time the effect on system performance will be less noticeable.
   - **Once every nn hours** – starting from midnight, writes any changes to the log at the interval specified. Enter a figure in the field or use the **Up** and **Down** buttons to select the required interval.

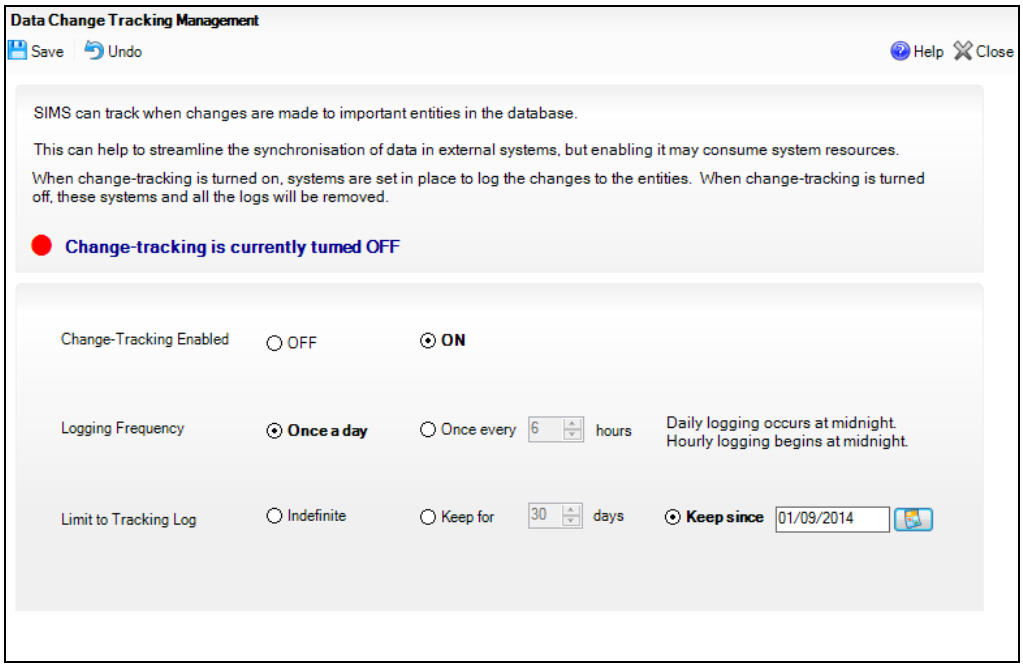
> *NOTE: Consideration must be given to the frequency of change logging. Selecting the **Once every nn hours** radio button and writing frequently to the log could affect the overall performance of SIMS. For this reason, the logging frequency defaults to **Once a day**.*

4. Select the range of data you wish to retain in the tracking log by selecting the appropriate radio button in the **Limit to Tracking Log** section.

   - **Indefinite** – retains the entire content of the tracking log until another option is selected.
   - **Keep for nn days** – retains the content of the tracking log for the number of days specified. For example, entering **30** days retains the content of the tracking log that day for the next 30 days. Once this period of time lapses, the content for that day is permanently deleted.

- **Keep since** – retains the content of the tracking log from a specified date, with no end date. This would be particularly useful if, for example, you wanted to retain details for a whole academic year. Selecting **01/09/09** (for example) will retain all change tracking information in the log from this date (start of the current academic year) onwards. Click the **Calendar** button and select the date from which you wish to retain the content of the log

5. If you have incorrectly edited any of the information on this screen and wish to revert to the point of your last save, click the **Undo** button.



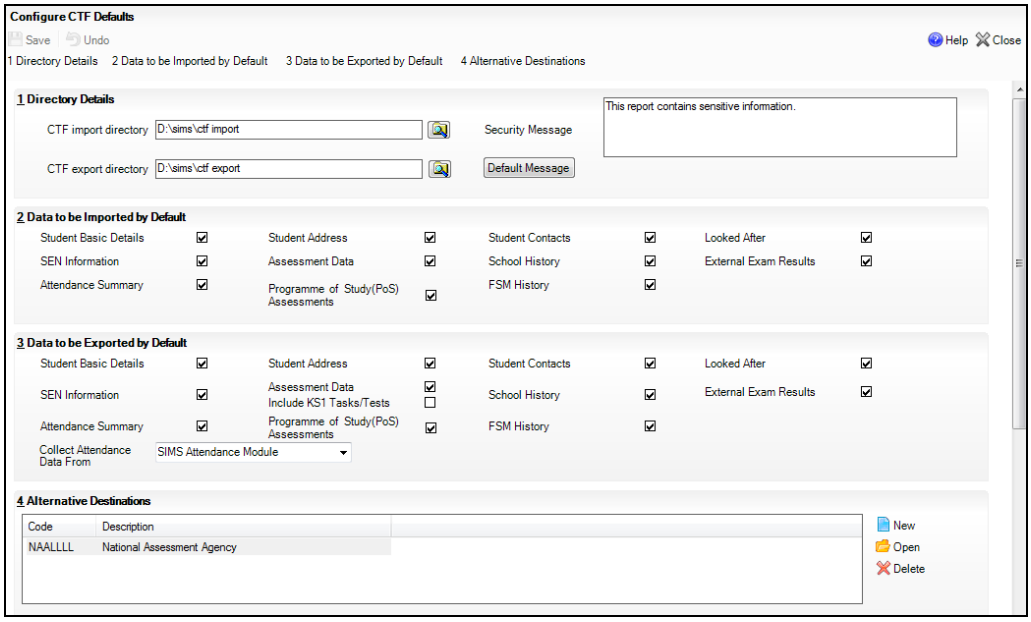
6. Once you have achieved the appropriate settings, click the **Save** button to save any changes made.

> ***IMPORTANT NOTE:*** *The change tracking process can be switched off by selecting the* ***OFF*** *radio button in the* ***Change-Tracking Enabled*** *section and clicking the* ***Save*** *button. Please be aware that switching off this functionality also permanently deletes the current content of the tracking log.*

Setting Up CTF Configuration Defaults

CTF configuration defaults must be set up before CTFs can be imported or exported. This includes setting the import/export directory details, specifying the data to be imported/exported by default in addition to adding any required alternative destinations. These enable the export of CTFs for pupil/students whose destination is unknown or for those who are moving to a school outside the maintained sector.

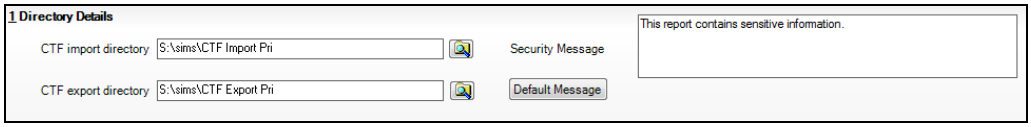
Select **Tools | Setups | CTF** to display the **Configure CTF Defaults** page.



Setting the Directory Details

Before a CTF can be imported or exported, CTF import and export folders must be specified. The folder must be available to any workstations on which CTFs will be accessed.

> ***IMPORTANT NOTE:*** *Due to the sensitive nature of some of the data stored in SIMS, careful consideration should be given when specifying the location of any folder into which you save sensitive data, e.g. statutory returns, imported and exported CTFs, etc.*
>
> *You should be mindful of your school's responsibilities with respect to information security. Consider which users have access to the chosen folder, especially if the folder is shared on a server. If you are in any doubt, you should consult with your IT Security Officer before proceeding.*



Specify the location of the **CTF import directory** (the folder where import files are stored prior to import) by clicking the **Browser** button in the **Directory Details** panel. Select the required folder from the **Browse for Folder** dialog.

Specify the location of the **CTF export directory** (the folder where export files are stored once created) by clicking the **Browser** button in the **Directory Details** panel. Select the required folder from the **Browse for Folder** dialog.

Below the folder names is a **Security Message** field, which contains text that will be displayed at the top of the applicable reports.

1. The security message text defaults to **This report contains sensitive information**, but can be edited, if required.

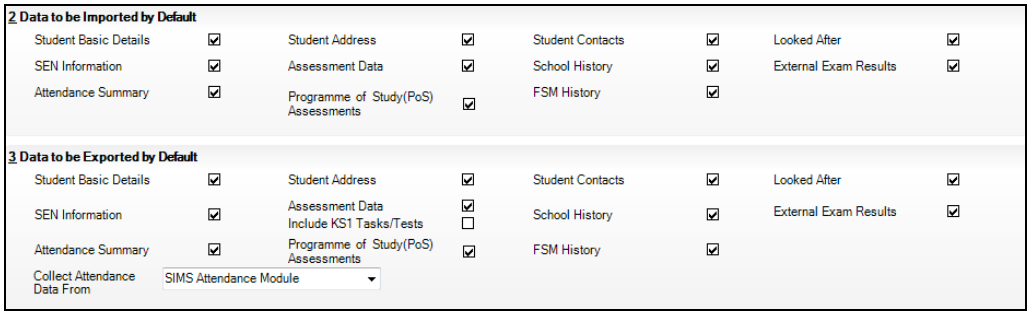
   If any edits are made, you can click the **Default Message** button to return to the default text.

2. Click the **Save** button.

Specifying the Data to be Imported by Default

Specify the data that should be imported by default (if it exists in the CTF file) by selecting the required check boxes in the **Data to be Imported by Default** panel.

> *TIP: Hover the mouse over each check box to view a list of the data in each section.*



These default selections can be changed on an individual file basis when importing a CTF file (via the **Import CTF** page) if required.

Matching Pupil/Students

This section describes how SIMS matches pupil/student records in the CTF file with existing pupil/students or applicant records already held in SIMS.

SIMS uses five mandatory pupil/student data items to match the records as follows:

- UPN
- Surname
- Forename
- Date of Birth
- Gender

A pupil/student record is considered a match if:

- all five of the mandatory data items match

  or

- the former UPN of an incoming student/applicant record matches with the UPN in SIMS and all the other four core data items match.

  or

- the Surname, Forename, Date of Birth and Gender match a pupil/student or applicant in SIMS, but there is no UPN recorded – the UPN recorded is a Temporary UPN.

Some schools may receive a CTF that contains additional information, not already in SIMS. For example, the CTF could contain Name, Address, UPN, Ethnicity, Religion. In SIMS, the applicant would have the Name, Address and UPN but not have the Ethnicity or Religion. By importing the CTF, SIMS would match the applicant and update the Ethnicity and Religion.

An assumption is made that data stored in SIMS for applicants that are in an Admission Group or pupil/students who are on-roll is the most current. For example, if the Ethnicity of a given record is present in the CTF, but missing from the SIMS database, then the import would store the new Ethnicity in SIMS.

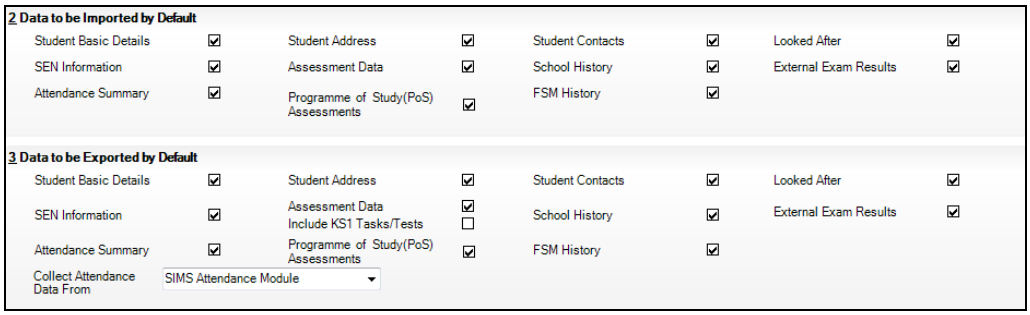
IMPORTANT NOTE: *Any pupil/student records where the reason for leaving is recorded as* ***Deceased*** *are not imported.*

More Information:
Data Included in the CTF Files on page *237*

Specifying the Data to be Exported by Default

1. Specify the data that should be exported by default by selecting the required check boxes in the **Data to be Exported by Default** panel.

   These default selections can be changed on an individual file basis when exporting a CTF file (via the **Export CTF** page) if required.



NOTE: While the administration of the Tasks and Tests at Key Stage 1 is still required (except for those working towards Level 1), the export of these results is optional. The default option is to export Teacher Assessments only.

2. Specify where attendance data should be collected from by selecting either **Pupil** (or **Student**) **Attendance Summary** or **SIMS Attendance Module** from the **Collect Attendance Data From** drop-down list.

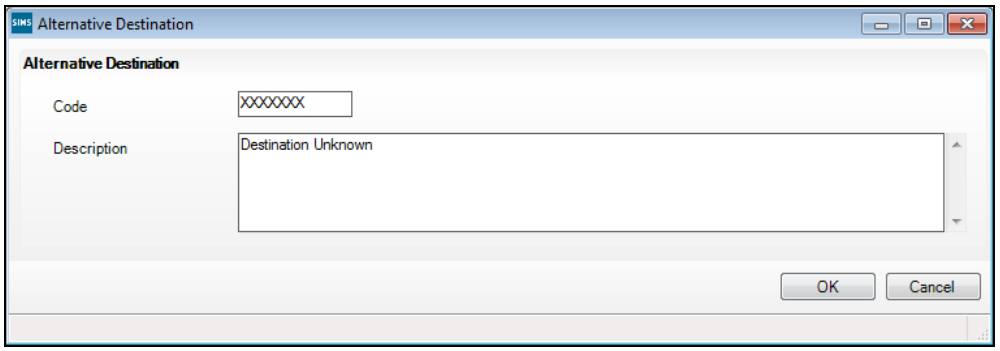
   The **Attendance Summary** exports data manually entered in the **CTF Attendance Summary** panel within a specific pupil/student record (in the **School History** panel). The **SIMS Attendance Module** collects data from the Attendance records.

Specifying Alternative Destinations

Alternative destinations are used to create destinations other than the schools defined in your SIMS system. You can for example, set alternative destinations for pupil/students whose destination is currently unknown, for pupil/students moving outside the maintained sector and/or for the NAA.

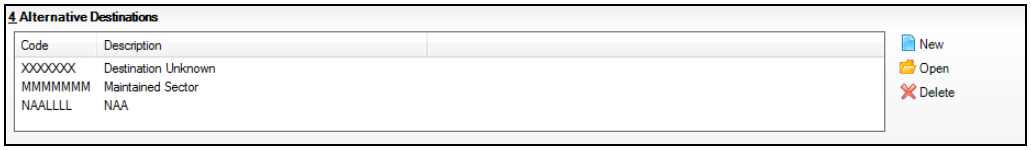
1. Click the **Alternative Destinations** hyperlink to display the **Alternative Destinations** panel.
2. Click the **New** button to display the **Alternative Destination** dialog.
3. To create an alternative destination for pupil/students moving to an unknown destination, enter a **Code** of XXXXXXX and a **Description** of `Destination Unknown`. Click the **OK** button to add the destination.

> *NOTE: Text entered in the **Description** field is displayed in the **Destination LA** and **Destination School** drop-down lists when exporting the CTF.*



To create an alternative destination for pupil/students moving outside the maintained sector (such as overseas or to a private school), click the **New** button then enter a **Code** of `MMMMMMM` and a **Description** of `Maintained Sector`. Click the **OK** button to add the destination.

To create an alternative destination for the NAA, click the **New** button then enter a **Code** of NAALLLL and a **Description** of NAA (or similar). Click the **OK** button to add the destination.



4. Repeat this process for any other required alternative destinations.

Saving the CTF Configuration Defaults

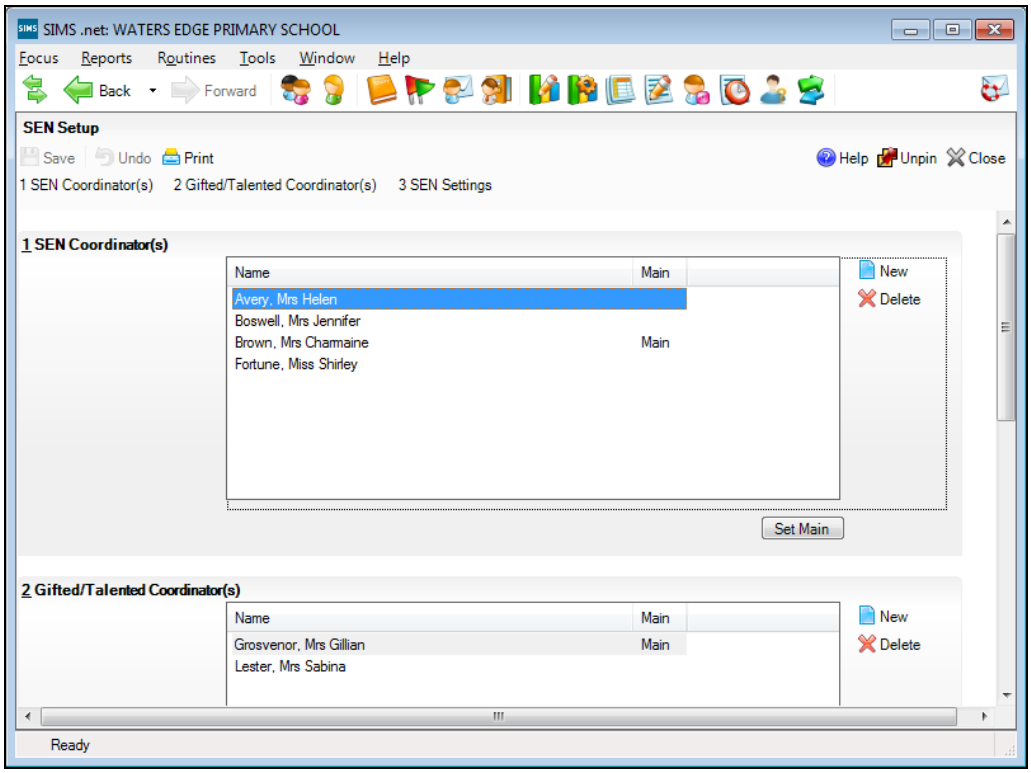
Click the **Save** button on the toolbar to save the configuration defaults.

Setting Up Special Educational Needs

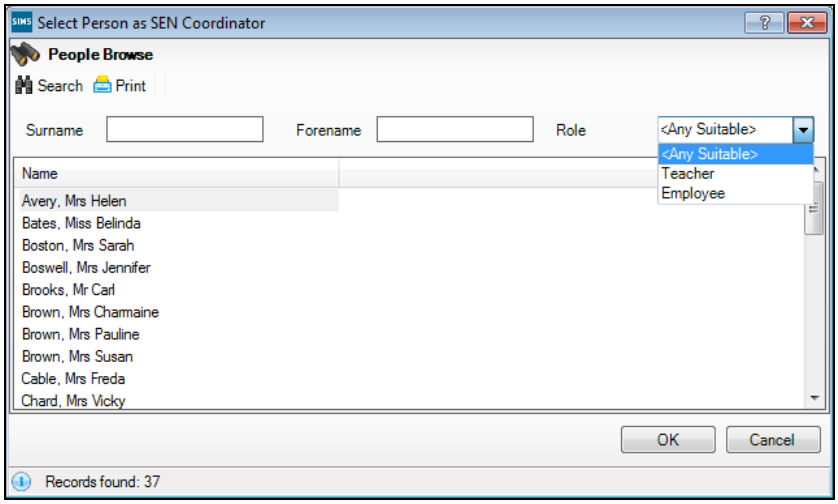
Before using the Special Educational Needs area of SIMS, you need to identify the members of staff within your establishment who will be assigned the role of SEN co-ordinators. They must already exist as a staff member in your SIMS system before they can be assigned to the role.

The role of co-ordinator can be assigned to one or more staff members according to the needs of your establishment. If multiple co-ordinators are required, you will need to identify the **Main** co-ordinator, i.e. the staff member who has overall responsibility. If only one co-ordinator has been specified, they will automatically be designated as the **Main** co-ordinator. The main co-ordinator's name is displayed by default when adding SEN reviews, etc.

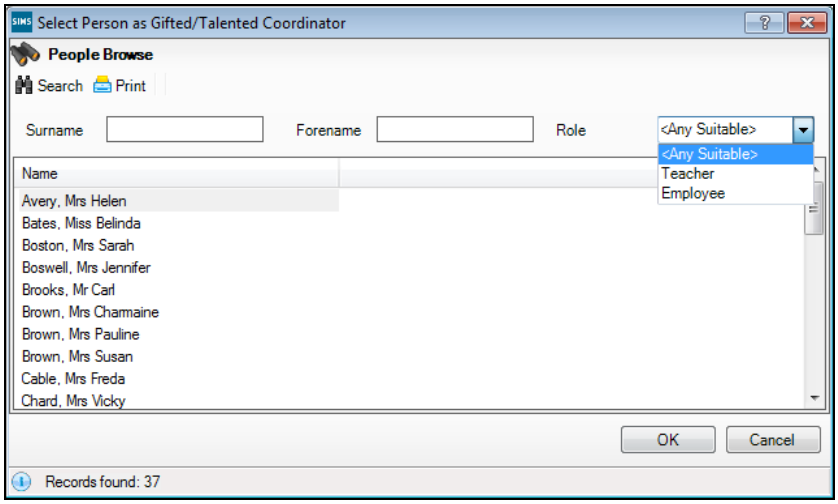
1. Select **Tools | Setups | SEN Setup** to display the **SEN Setup** page.



2. Click the **New** button adjacent to the **SEN Coordinator(s)** field to display the **Select Person as SEN Coordinator** dialog.



3. Find the required person by entering a combination of their **Surname**, **Forename** and selecting their current **Role** from the drop-down list and clicking the **Search** button.
4. Highlight the required person from the list and click the **OK** button. Their name is now displayed in the **SEN Coordinator(s)** panel on the **SEN Setup** page.
5. If you have assigned more than one SEN co-ordinator, highlight the name of the individual who has overall responsibility for Special Educational Needs and click the **Set Main** button.
6. Click the **New** button adjacent to the **Gifted / Talented Coordinator(s)** panel to display the Select Person as Gifted/Talented Coordinator dialog.



7. Find the required person by entering a combination of their **Surname**, **Forename** and selecting their current **Role** from the drop-down list. Click the **Search** button to locate the required individual.
8. Highlight the required person from the list and click the **OK** button. Their name is now displayed in the **Gifted / Talented Coordinator** panel.

9. If you have assigned more than one Gifted/Talented co-ordinator, highlight the name of the individual who has overall responsibility for overseeing the category and click the **Set Main** button.
10. In the **SEN Settings** panel, enter the number of days in the **Review Reminder Days** field. This enables you to specify the number of days in advance that you will be reminded about forthcoming reviews.

> *NOTE: If zero is entered, no review reminders are generated. If 1 is entered, review reminders are displayed for reviews due today and the following day.*

11. Click the **Browse** button adjacent to the **IEP Writer Path** field and navigate to the location of the **IEPWriterV3** executable file.

    This should be located in `C:\IEP` but it might have been installed to a different location.
12. Click the **Open** button to select the file name.
13. In the **SEN Settings** panel, select the **Hide Additional Support** check box. This option is applicable to English schools that do not wish to view or record data in these fields. For more information, please refer to the *Hiding the Additional Support Fields* topic in the *Getting Started with Special Educational Needs* chapter of the *Special Educational Needs* handbook.
14. Click the **Save** button to save the details.

Additional Resources:

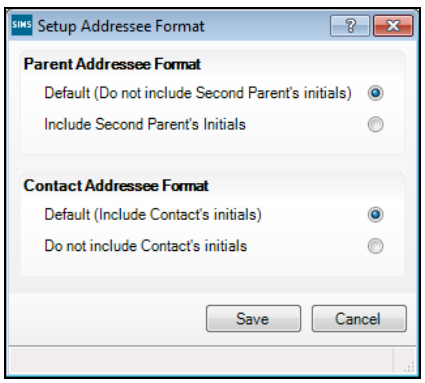
Special Educational Needs handbook

Setting up the Addressee Format

The addressee format is used when sending letters to pupil/student's parents or contacts. It is customary to use the term 'Dear' when addressing someone at the start of a letter or an email. However, the remainder of the salutation depends on the information provided by the parents or contacts at the time of their child's acceptance to your school.

To ensure that all your formal school letters are of a consistently high standard, it is possible to specify how SIMS routinely displays the available parental and contact information.

1. Select **Tools | Setups | Setup Addressee Format** to display the **Setup Addressee Format** dialog.



On the **Parental Addressee Format** panel there are two radio buttons to choose from:

- **Default (Do not include Second Parent's initials)** - This indicates that for a Mr B. and Mrs H. Thompson, the addressee format displays only `Mr and Mrs B. Thompson`.
- **Include Second Parent's Initial -** From the example above, the addressee format displays `Mr B. and Mrs H. Thompson`.

On the **Contact Addressee Format** panel there are two radio buttons to choose from:

- **Default (Include Contact's initials)** - For example, `Mr B. Thompson`
- **Do not include Contact's initials** - For example, `Mr Thompson`

2. When you have decided how you would like the letters to be addressed, click the **Save** button to apply the setting.

   Please refer to the *Managing Pupil/Students* handbook for further information.

Setting up the Emergency Alert Notification

It may be necessary for a class teacher to request immediate assistance as a result of an emergency in the classroom. The use of emergency alerts in SIMS enables a class teacher to request assistance from anywhere in SIMS, both quickly and efficiently.

Prior to using this functionality, you must select the member(s) of staff who will be notified immediately in the event of an emergency, together with the preferred method of contacting them.

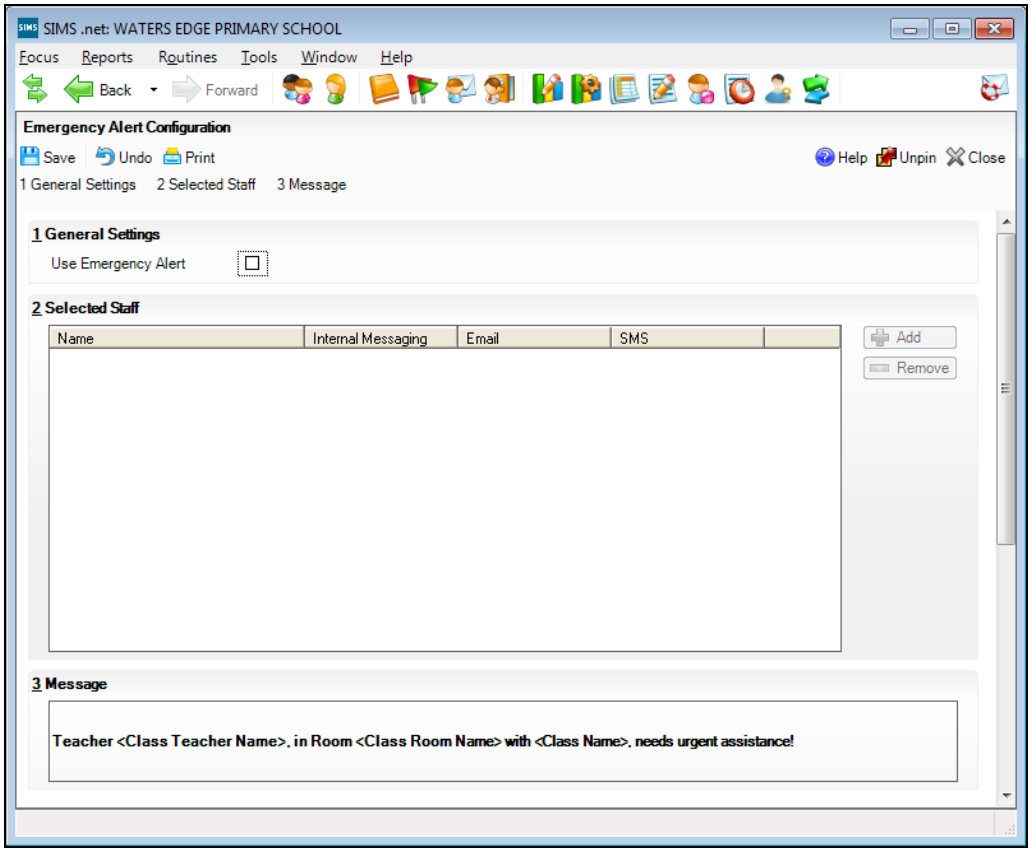
Once the intended recipients of emergency alerts have been selected, they will receive an internal message (accessible via the **My Messages** panel on the SIMS **Home Page**). Careful consideration should be given to the selection of intended recipients for an emergency alert.

Once opened, the message displays the following predefined text. This text is read-only.

Teacher <Class Teacher Name>, in Room <Class Room Name> with <Class Name>, needs urgent assistance!

The **<Class Teacher Name>**, **<Class Room Name>** and **<Class Name>** tags are populated automatically by SIMS once the emergency alert message is sent. This information is extracted from your SIMS database, preventing the need to enter it manually.

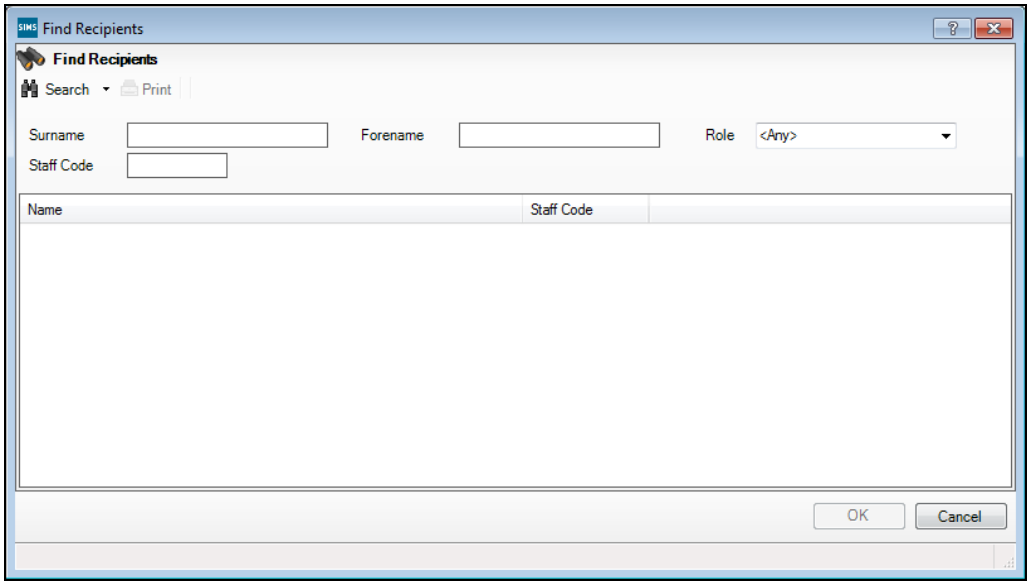
1. Select **Tools | Setups | Emergency Alert** to display the **Emergency Alert Configuration** page.



2. If you wish to make use of the emergency alert functionality, select the **Use Emergency Alert** check box in the **General Settings** panel.

> *NOTE: It is possible to use this functionality only if the **Use Emergency Alert** check box is selected.*

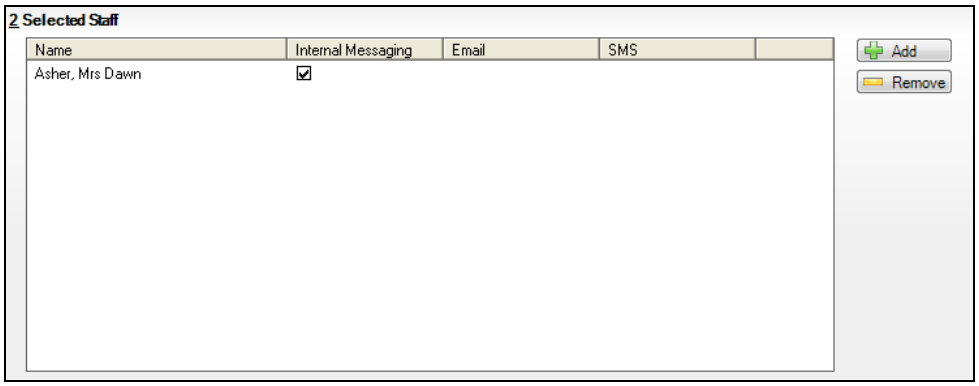
3. Select the member(s) of staff you wish to notify each time an emergency alert is triggered by clicking the **Add** button in the **Selected Staff** panel to display the **Find Recipients** dialog.



4. Enter the intended recipient's **Surname**, **Forename** and/or **Staff Code**.
5. Select their staff **Role** from the drop-down list.
6. Select the type of search you wish to carry out by clicking the drop-down arrow adjacent to the **Search** button then making your selection, e.g. **Names Begin With** or **Names Sound Like**.

   The default option is **Names Begin With**, so if you wish to use this option click the **Search** button.

   Alternatively click the **Search** button without entering search criteria to display all members of staff recorded in SIMS.
7. Highlight the required intended recipient(s) then click the **OK** button to return to the **Emergency Alert Configuration** page, where the selected recipient is displayed in the **Selected Staff** panel.



8. Repeat steps 3 to 7 to add more recipients of an emergency alert, if required.
9. Any members of staff added in error can be removed by highlighting their name then clicking the **Remove** button.

10. Select the preferred method of communication for each recipient of an emergency alert by selecting the appropriate check boxes. The options are:
    - **Internal Messaging** – this option is available only if the person is recorded as being a SIMS user.
    - **Email** – this option is available only if an email address is recorded against the person and the address has been marked as **Home / Main** or **Work / Main**.
    - **SMS** – this option is available only if a mobile phone number is recorded against the person and the number has been marked as their **Main** number.

    NOTE: More than one method of communication can be selected, if required.
11. The **Message** panel displays the text that will be sent to the selected recipients each time an emergency alert is sent. This text is read-only.
12. Once the required information has been selected, click the **Save** button to save your changes.

Setting Up SIMS Services

Specific functions within SIMS require the use of an external **Service** to enable them to function correctly. An **Address Validation Service** is one of these functions.

Other services can also be specified. For example, the **Document Management Server** might be located on a separate machine and require the addition of an internal service to enable users to connect to it and access the information that is stored on it.

From time to time, these services might need to be amended to reflect any changes made by the service providers and this can be done using the **SIMS .net Services** page.

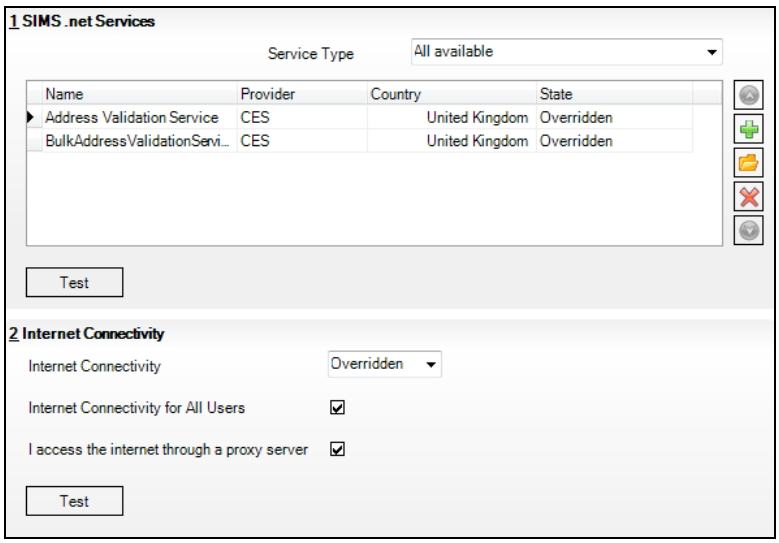
Setting Address for the Bulk Address Validation Service

For schools to benefit from the Address Validation Service/Bulk Address Validation Service, the system must be able to connect to an external database that holds address point data. Existing and new address details in SIMS can be validated against this data.

A URL must be specified so that whenever the Address Validation Service is called from within SIMS, SIMS connects to the specified location to access the information held in the external database.

NOTE: Only users with System Manager permissions can add and edit existing services.

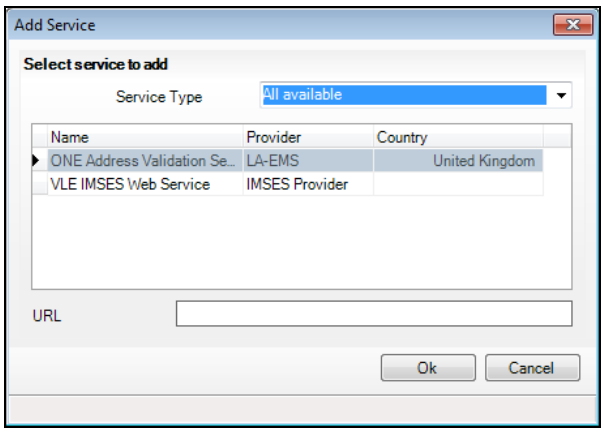
1. Select **Tools | Setups | SIMS Services** to display the **SIMS .net Services** page.



2. In the **SIMS .net Services** panel, select the **Service Type** that you want to view from the drop-down list.

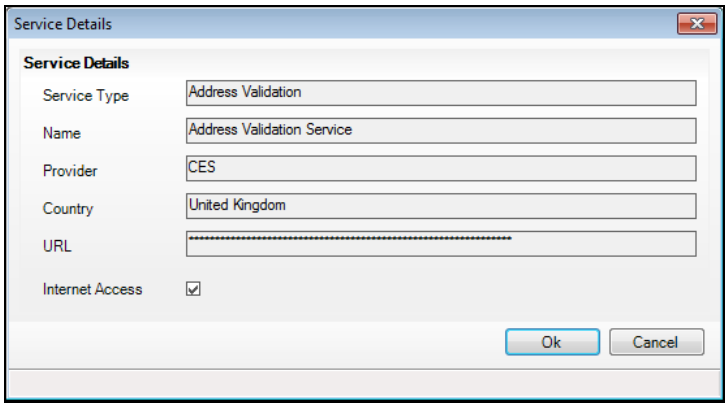
   If you select the **All available** option, all the existing services are displayed, regardless of their type. The **Name** of the service, the **Provider**, the **Country** and its current **State** are displayed. Internal services display **SIMS** in the **Provider** field, while external services display **User Defined**.

3. If you want to define an additional service (either internal or external), click the **Add new service of the selected type** button to display the **Add Service** dialog. These services might include LA services for the transmission of Business to Business data, etc.

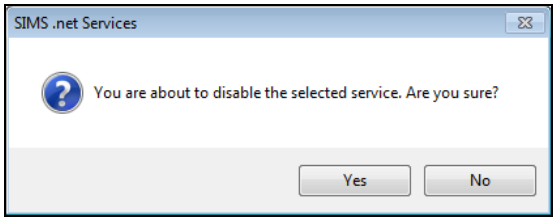


4. Select **Address Validation** or **Bulk Address Validation** from the **Service Type** drop-down list.
5. Enter the **URL** provided by the third party supplier. This is used to connect to the external database when address validation is requested from within SIMS.
6. Click the **OK** button.

7. Once the new service has been saved, highlight the name and click the **Test** button in the bottom left-hand corner of the **SIMS .net Services** panel to ensure that the connection works satisfactorily.
8. Click the **Save** button.
9. If you want to edit or view an existing service, highlight the service **Name** and click the **Inspect selected service details** button to display the **Service Details** dialog.



10. Edit any of the details and click the **OK** button.
11. If you want to delete a service that is no longer required, highlight the name of the service in the **SIMS .net Services** panel and click the **Remove selected service** button.



12. Select the **Yes** button to disable the selected service.
13. If you have amended any of the service details, click the **Test** button to ensure that the service is still fully operational.
14. Click the **Save** button.
15. If you would like to change the priority of any existing services, use the **Up** and **Down** arrows. For example, if there are two Address Validation Services specified, you can select the preferred service by moving it to the top of the list.
16. Click the **Save** button.

Defining the Internet Connectivity Settings

In the **Internet Connectivity** panel, you can specify whether you want the SIMS system to connect to the Internet whilst the application is running.

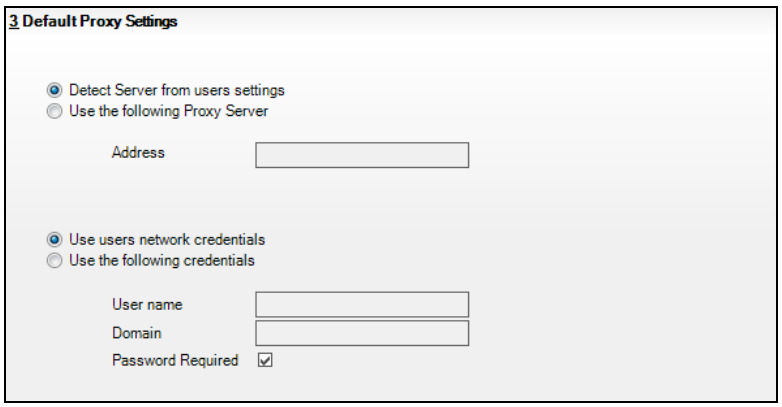
1. The **Internet Connectivity** status can be changed by selecting an alternative option from the drop-down list. The options are **Online**, **Offline** or **Overridden**. If **Overridden** is selected, the ability to specify **Internet Connectivity Credentials** is not available.
2. If you want all users of the system to be able to connect to the Internet whilst the application is in use, for this session, select the **Internet Connectivity for All Users** check box.
3. If applicable, select the **I access the internet through a proxy server** check box.
4. Click the **Test** button to ensure that the PC can connect to the Internet.
5. When you are certain that the service is fully operational, click the **Save** button.

Specifying Default Proxy Server Settings

To enable users of SIMS to access external services, e.g. the Address Validation Service, through the safety of a protected internet connection, schools can specify the location of a default proxy server to filter requests and protect the integrity of their secure network.

It is the responsibility of schools to ensure that credentials are managed correctly to prevent unauthorised access.

Click the **Default Proxy Settings** hyperlink to display the **Default Proxy Settings** panel.



If your system is set up so that a proxy server controls access to the Internet resource then the **Address** for the proxy server must be specified and this must be a school-wide setting.

Once the default proxy server has been specified, most users are able to access the Internet resource by selecting the **Detect Server from users settings** radio button.

If an alternative proxy server is required, for whatever reason, users should select the **Use the following Proxy Server** radio button. This activates the **Address** field and enables the entry of an alternative resource location.

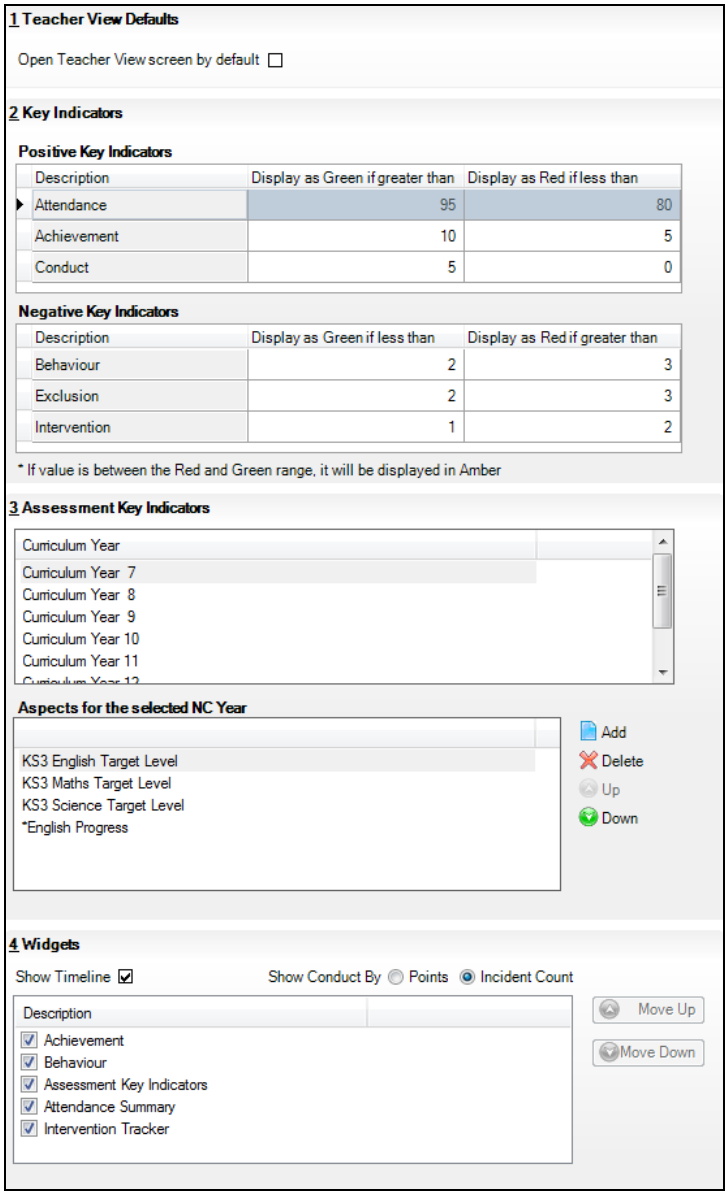
If the **Use users network credentials** radio button is selected, the default proxy server identifies and uses the **User name**, **Password** and **Domain** of the current user.

If the **Use the following credentials** radio button is selected, users are required to enter an alternative **User name** and an alternative **Domain**. If a password is required to access the alternative domain, select the **Password Required** check box.

Configuring the Pupil (or Student) Teacher View

The **Pupil** (or **Student**) **Teacher View** page enables you to view a summary of pupil/student information. Before using the Pupil (or Student) Teacher View, the School Administrator must define default settings, which determine the scope of information displayed in line with your school's behaviour policy and assessment monitoring procedures.

Select **Tools | Setups | Pupil** (or **Student**) **Teacher View** to display the **Pupil** (or **Student**) **Teacher View Setup** page.



Setting the Purpose of the Pupil / Student Button on the Quick Launch Toolbar

The default behaviour of the left-hand icon on the SIMS **Home Page** quick launch toolbar depends on the type of user:

Pupil (or Student) icon / Pupil (or Student) Teacher View icon

- When a Class Teacher clicks this icon, the **Pupil** (or **Student**) **Teacher View** is displayed by default.
- When any other user clicks this icon, the **Pupil** (or **Student**) **Details** page is displayed by default.

However, the default behaviour of this button can be toggled between the **Pupil** (or **Student**) **Teacher View** and the **Pupil** (or **Student**) **Details** page.

> *NOTE: This setting works on a per user basis, so the definition of the default behaviour of this button affects only the user who makes the change.*

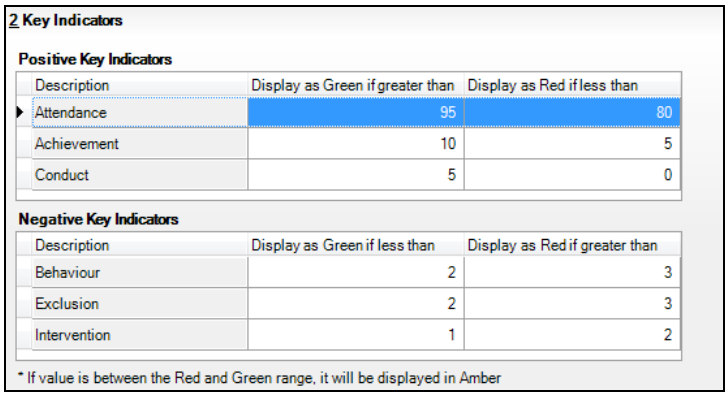
1. If you wish to change the default behaviour of the icon, either select or deselect the **Open Teacher View screen by default** check box in the **Teacher View Defaults** panel.

2. Click the **Save** button.
3. Restart SIMS to affect the change of behaviour of this icon.

   When you hover over the icon, its label changes to either **Pupil** (or **Student**) **Details** or **Pupil** (or **Student**) **Teacher View**, depending on the option selected.

Setting Up the Key Indicators

The **Pupil** (or **Student**) **Teacher View** displays a range of positive and negative key indicators (via a range of colours) for each pupil/student in the **Basic Details** widget, providing a high level summary throughout the academic year. The Pupil (or Student) Teacher View can be configured to display information in green if a pupil/student attains greater than 10 **Achievement** points and to display information in red if their **Attendance** drops below 80%.



The points value for each of the following factors can be defined and in turn, the colour coding is implemented on the Pupil (or Student) Teacher View.

For **Positive Key Indicators**, **Display as Green if greater than** and **Display as Red if less than** figures can be entered:

- Attendance
- Achievement
- Conduct

For **Negative Key Indicators**, **Display as Green if less than** and **Display as Red if greater than** figures can be entered:

- Behaviour
- Exclusion
- Intervention

> *NOTE: If a value falls between the defined range of red and green values, it is displayed in amber.*

1. In the **Positive Key Indicators** panel, click in the **Display as Green if greater than** cell of the required key indicator and enter a value. For example, clicking in the **Attendance** cell and entering 95 displays the pupil/student's attendance information in green if they achieve greater than 95% attendance over the course of the current academic year.
2. Click in the **Display as Red if less than** cell of the same key indicator and enter a value. For example, clicking in the **Attendance** cell and entering 80 displays the pupil/student's attendance information in red if they achieve less than 80% attendance over the course of the current academic year.
3. Repeat Steps 1 and 2 for the remaining **Positive Key Indicators**.

> *NOTE: Attendance data is categorised as a Positive Key Indicator because the higher the percentage figure, the better their attendance record.*

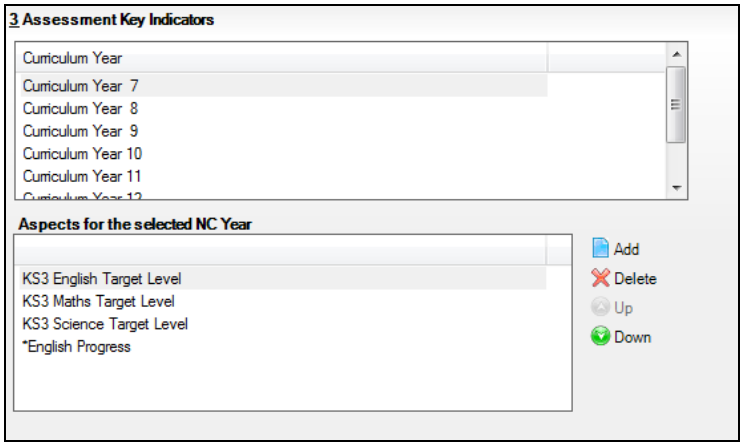
4. Repeat Steps 1 to 3 for the **Negative Key Indicators**, noting that the column headers are named **Display as Green if less than** and **Display as Red if greater than**.
5. Click the **Save** button.

Setting Up the Assessment Key Indicators

Key Stage levels of attainment can be displayed on the Pupil (or Student) Teacher View.

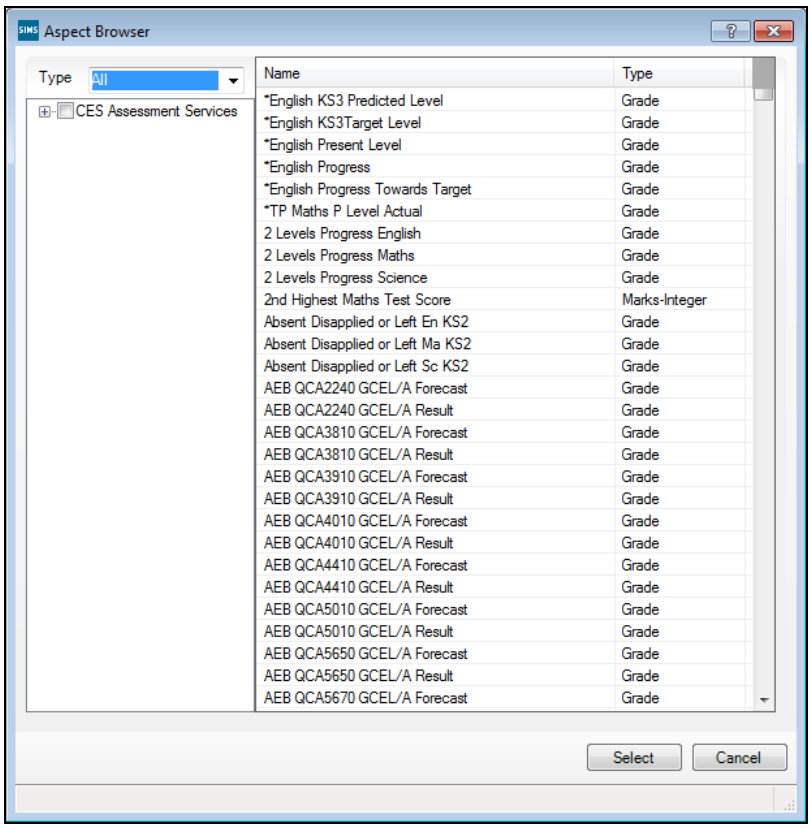
> *NOTE: A maximum of six Assessment Key Indicators can be displayed on the **Pupil** (or **Student**) **Teacher View** page at a time.*

1. In the **Assessment Key Indicators** panel, click the **Curriculum Year** for which you wish to select aspects to display on the Pupil (or Student) Teacher View.



Any aspects that are already selected for the **Curriculum Year** are displayed in the **Aspects for the selected NC Year** panel.

2. Add an aspect for the **Curriculum Year** by clicking the **Add** button to display the **Aspect** browser.



The **Type** of aspect defaults to **All** but can be amended by selecting from the drop-down list.

3. To filter the list of aspects displayed in the **Aspect** browser, navigate through the tree structure in the left-hand panel using the **+** and **–** buttons then select the category or categories with which the required aspect is associated.
4. Select its check box to display, in the right-hand panel, the aspects that belong to the selected category.
5. To include an aspect on the Pupil (or Student) Teacher View for the selected Curriculum Year, highlight it then click the **Select** button to return to the **Pupil** (or **Student**) **Teacher View Setup** page.
6. Repeat this process to add further assessment key indicators to the Pupil (or Student) Teacher View, up to a maximum of six.
7. An aspect can be removed by highlighting it in the **Aspects for the selected NC Year** panel then clicking the **Delete** button.
8. The display order of the aspects can be changed by highlighting an aspect then clicking either the **Up** or **Down** button.
9. Click the **Save** button.

Selecting the Widgets to Display

You can define the range of widgets displayed on the Pupil (or Student) Teacher View and the order in which they are displayed. It is also possible to toggle the display of the **Timeline** widget on or off.

1. If you want to display the **Timeline** widget on the Pupil (or Student) Teacher View, select the **Show Timeline** check box in the **Widgets** panel.

> *NOTE: This option is selected by default for Secondary schools and deselected for Primary schools.*

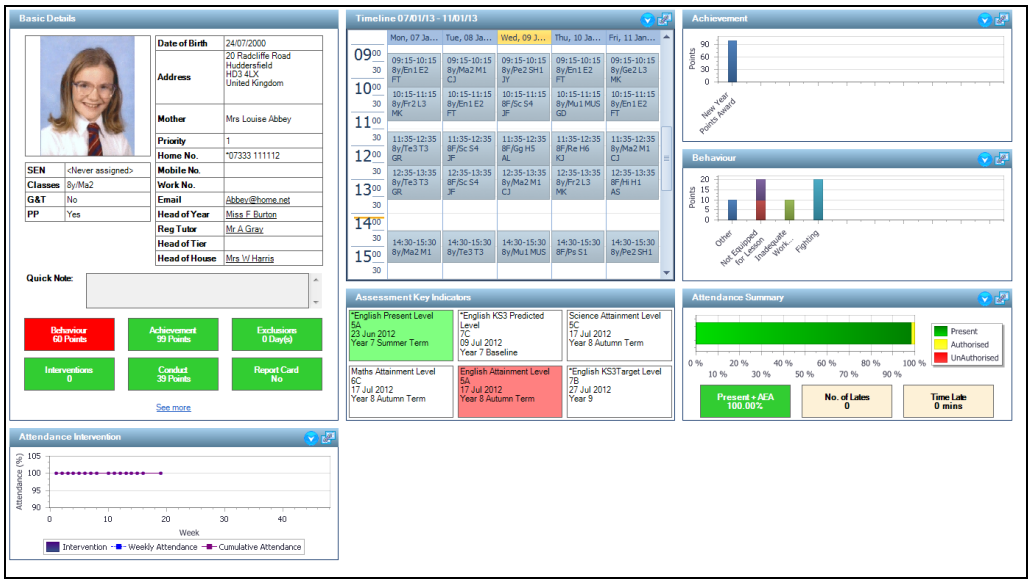
2. To determine whether conduct widgets displayed on the Pupil (or Student) Teacher View show the number of **Points** or the number of **Incidents**, select the appropriate **Show Conduct By** radio button.
3. Define the additional widgets that you wish to display on the Pupil (or Student) Teacher View by selecting or deselecting the following check boxes:
   - Achievement
   - Behaviour
   - Assessment Key Indicators
   - Attendance Summary
   - Intervention Tracker.

4. Select the order in which you want the widgets to display on the Pupil (or Student) Teacher View by clicking the name of a widget then clicking either the **Move Up** or **Move Down** button. Repeat this process until the widgets are displayed in the required order.
5. Click the **Save** button.

   Widgets are added to the Pupil (or Student) Teacher View by filling any available space on-screen to the right of any existing widget. Where there is no available space on the right-hand side of the screen, the widget is placed in the next available space on the following row.

   In the following graphic of the Pupil (or Student) Teacher View, the widgets have been placed in the order described in Step 1 (where the **Achievement** widget is first in the list and the **Intervention Tracker** is last).

   The **Basic Details** widget is <u>always</u> displayed as the first widget and the **Timeline** widget is also displayed because the **Show Timeline** check box is selected; if displayed on the Pupil (or Student) Teacher View, the **Timeline** is <u>always</u> displayed as the second widget. The remaining five widgets that have been selected are displayed on the Pupil (or Student) Teacher View in the prescribed order ensuring that, as far as possible, all available space is used.



Managing Home Page Groups

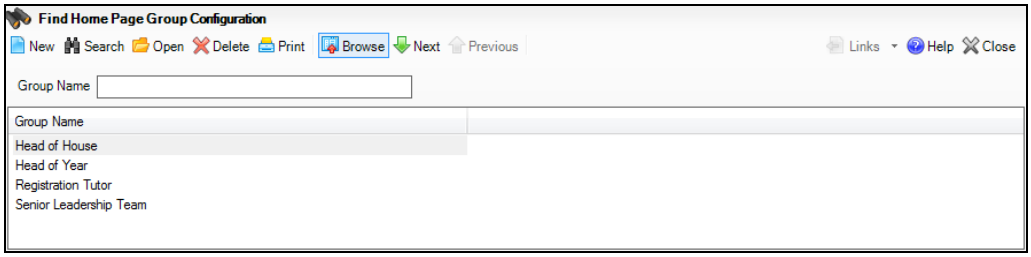
SIMS provides four pre-defined Home Page groups by default. Three of the pre-defined groups are populated automatically with SIMS users, based on their role in the pastoral structure; the Senior Leadership Team is the exception because it requires users to be assigned manually. If the pre-defined Home Page groups do not provide sufficient groupings of SIMS users, you can create your own ones then assign users and Home Page panels to these groups.

A user can be assigned to more than one Home Page group, meaning that they will be assigned the aggregate of the panels selected for each Home Page group. If a user is not assigned to at least one Home Page group, they are assigned a default set of panels on their Home Page.

Searching for a Home Page Group

Before adding a Home Page Group, you are advised to search for existing groups to ensure that a group with a similar or identical purpose does not already exist.

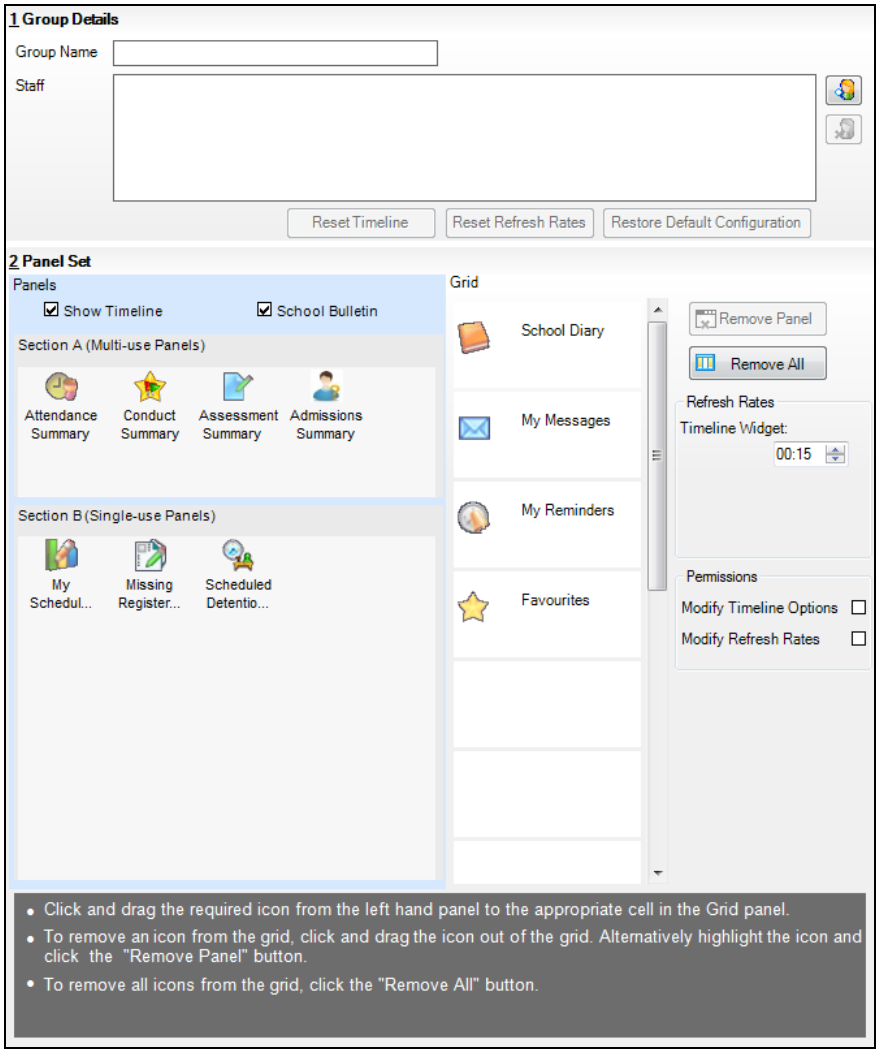
1. Select **Routines | Home Page | Home Page Group Configuration** to display the **Find Home Page Group Configuration** browser.



2. Enter all or part of the **Group Name** then click the **Search** button to display all Home Page groups that match the search criteria entered. Alternatively, leave the search criteria blank then click the **Search** button to display all recorded Home Page groups.

Adding/Editing Home Page Groups

1. Search for the Home Page group you wish to edit. If you intend to add a Home Page group, search to ensure that an identical one does not already exist.
2. Highlight the Home Page group you wish to edit then click the **Open** button or add a Home Page group by clicking the **New** button to display the **Home Page Group Configuration Details** page.

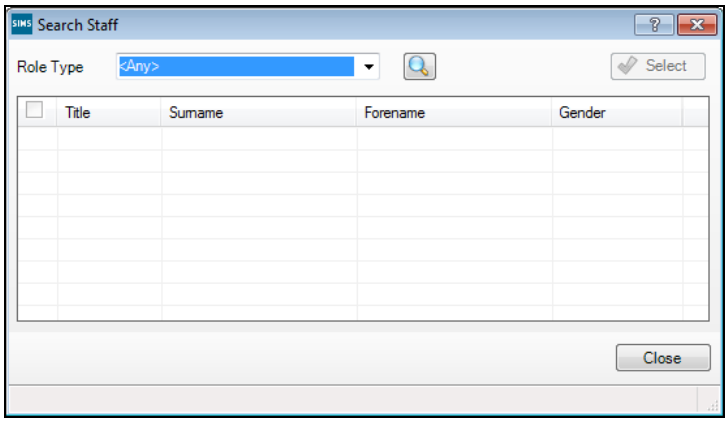


3. Enter a unique **Group Name**.

Assigning Users to a Home Page Group

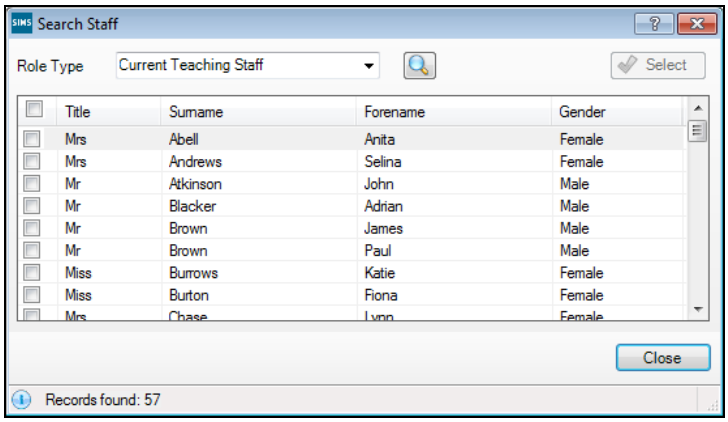
1. Click the **Search Staff** button to display the **Search Staff** dialog.

Search Staff button



2. Search for the required member(s) of staff by selecting their **Role Type** from the drop-down list (e.g. **Current Teaching Staff**) then clicking the **Search** button to display all members of staff with that role. Searching by **Role Type** is a convenient method of assigning all current teaching staff to a single Home Page group.

Search button



3. Select the check box of the member(s) of staff you wish to add to the Home Page group. Alternatively, select the check box in the header row to select all members of staff currently displayed in the **Search Staff** dialog.
4. Click the **Select** button to assign the member(s) of staff to the Home Page group.
5. Click the **Close** button to return to the **Home Page Group Configuration Details** page, where the **Staff** list is populated with the selected member(s) of staff.

6. Any members of staff who have been added in error can be removed from the group by highlighting their name then clicking the **Remove Staff** button.

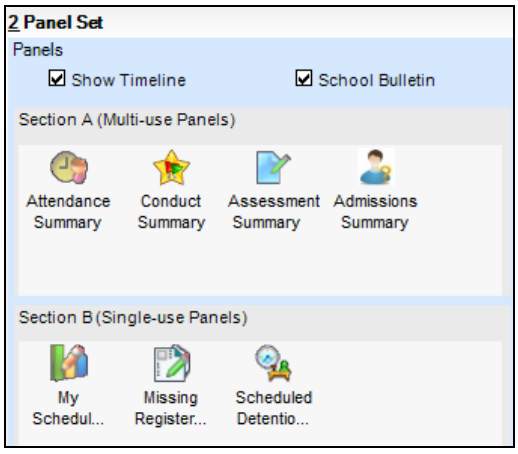
Remove Staff button

> *NOTES: A user can be assigned to more than one Home Page group, meaning that they will be assigned the aggregate of the panels selected for each Home Page group.*
>
> *If a staff member is assigned to more than one Home Page group, and you subsequently remove them from one of these groups, the panels assigned to the group from which they have been removed will still be displayed on their Home Page until they have been removed manually by the user. To remove all group panels from a user's Home Page, the user must be removed from all Home Page groups.*
>
> *If a user is not assigned to at least one Home Page group, they are assigned a default set of panels on their Home Page.*

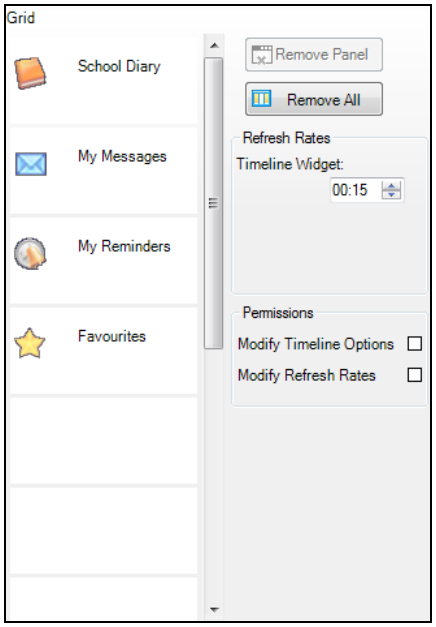
Allocating Panels to a Home Page Group

1. In the **Panel Set** panel, select the **Show Timeline** and **School Bulletin** check boxes to display these panels on the Home Page of users assigned to the selected Home Page group.

   The icons in **Section A** and **Section B** represent the panels that can be added to the Home Page group.



The **Grid** section on the right-hand side of the **Panel Set** panel consists of any panels already assigned to the Home Page group, together with a number of available spaces into which additional panels can be placed.



2. To add a panel to the selected Home Page group, click and drag it from the **Section A** or **Section B** on the left-hand side of the **Panel Set** panel into the required position in the **Grid** on the right-hand side of the **Panel Set** panel.
3. To switch the position of panels in the grid, click and drag the panel you wish to move to the required location.
4. To remove a panel, click and drag the panel out of the grid. Alternatively, click the panel you wish to remove then click the **Remove Panel** button. To remove all panels from the **Grid**, click the **Remove All** button.

> ***WARNING:*** *Careful consideration should be given when adding panels to a Home Page group, particularly when the group consists of a large number of users. Some of the panels have frequent refresh intervals, so a large number of panels displaying on several workstations could lead to a reduction in the performance of the SIMS system.*

5. Click the **Save** button to save the changes. The changes to a Home Page group come into effect once SIMS is restarted on a user's workstation.

Preventing Changes to the Home Page Configuration and Resetting Configurations

1. If you want to prevent users who are members of a Home Page group from changing the configuration of the **My Timeline** widget, i.e. prevent users from selecting the events displayed on the widget:
   a. Deselect the **Modify Timeline Options** check box in the **Permissions** panel.
   b. Click the **Save** button.

2. If you want to reset the **My Timeline** widget for users who are members of a Home Page group to its original configuration as defined in the **Home Page Timeline Configuration** dialog:
   a. In the **Staff** list in the **Group Details** panel, highlight the members of staff for whom you wish to affect the change.
   b. Click the **Reset Timeline** button, click the **OK** button to confirm the selection of staff then click the **Yes** button.
3. If you want to prevent users from changing the refresh rates for the widgets displayed on their Home Page:
   a. Deselect the **Modify Refresh Rates** check box in the **Permissions** panel.
   b. In the **Refresh Rates** panel, enter the refresh rate of the **Timeline Widget** or select the rate by clicking either the **Up** or **Down** button. This is a global value that cannot be changed by a user, if the **Modify Timeline Options** check box is selected.
   c. Click the **Save** button.
   d. To set a default refresh rate (which cannot then be changed by a user), click each widget displayed in the **Grid** panel then enter a refresh rate in the widget-named field in the **Refresh Rates** panel or select the rate by clicking either the **Up** or **Down** button. This option is available only for widgets that have a configurable refresh rate.
   e. In the **Staff** list in the **Group Details** panel, highlight the members of staff for whom you wish to affect the change.
   f. Click the **Reset Refresh Rates** button, click the **OK** button to confirm the selection of staff then click the **Yes** button to affect the change.
4. If a user's Home Page configuration has been corrupted, you can reset the configuration of the Home Page for all members of staff associated with the selected Home Page group.
   a. In the **Staff** list in the **Group Details** panel, highlight the members of staff for whom you wish to affect the change.
   b. Click the **Restore Default Configuration** button, click the **OK** button to confirm the selection of staff then click the **Yes** button to affect the change.
5. Click the **Save** button then restart SIMS to update the system configuration.

Locking Home Page Groups

The panels assigned to each Home Page group can be locked to ensure that users cannot remove them from their Home Page. This functionality can also be used to prevent users from displaying additional panels on their Home Page.

> *NOTES: Setting a lock on Home Page groups does not prevent users from configuring panels that are already displayed on their Home Page.*
>
> *Careful consideration should be given to the locking options selected because any setting applied affects all Home Page groups. It is not possible to select the Home Page groups to which you wish to apply a lock.*

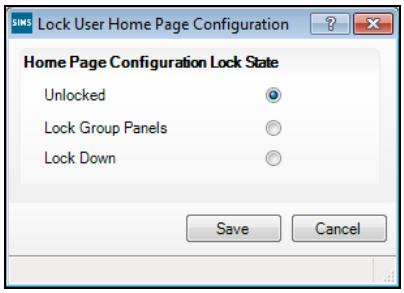
Three levels of locking are available:

- **Unlocked** - this is the default option. The panels assigned to all Home Page groups are initially displayed on each member's Home Page. However, each group member can add or remove panels as required. The additional panels selected by each user do not affect the panel configuration of the remaining members of the Home Page group.
- **Lock Group Panels** - selecting this option prevents the removal of panels assigned to each group member. Each group member can display additional panels on their Home Page. However, none of the default panels assigned to the Home Page group can be removed. Any additional panels that a member chooses to display do not affect the panel configuration of the remaining members of the Home Page. Any additional panels that a member chooses to display can be removed, if required.

> *NOTE: The **Lock Group Panels** option does not lock the **Show Timeline** or **School Bulletin** check boxes, or the **School Diary**, **My Messages**, **My Reminders** or **Favourites** panels in the **Configure Home Page** dialog (accessed by clicking the **Configure** button at the top of the SIMS **Home Page**. All of these panels are user-defined and therefore can be removed by each user.*

- **Lock down** - selecting this option locks all panels on the Home Page for all users. This rule applies to panels that are assigned to a Home Page group, to panels that have been added by each user and to panels of any user who is not a member of a Home Page group. Selecting this option prevents a user from displaying additional panels and from removing existing panels.

1. Select **Routines | Home Page | Lock Home Page Configuration** to display the **Home Page Configuration Lock State** dialog.



2. Select the required radio button then click the **Save** button to save the lock configuration.

   The lock setting comes into effect when SIMS is restarted on a user's workstation.

Deleting Home Page Groups

Home Page groups that have been added in error or are no longer required can be deleted.

1. Select **Routines | Home Page | Home Page Group Configuration** to display the **Find Home Page Group Configuration** browser.
2. Click the **Search** button to display all Home Page groups.

3. Highlight the group you wish to delete then click the **Delete** button.

Managing the Quick Letter Template

The Quick Letter functionality provides the means to create a default letter to a pupil/student's contact. The letter automatically includes relevant details such as the parent/guardian's address, pupil/student name, etc. The letter can be printed, saved locally onto a workstation or uploaded to the Document Management Server (DMS) as an attachment to a pupil/student record making it available to other users.

The Quick Letter template is a `.doc` file. It includes macros that are designed to insert the relevant information into the letter.

> ***IMPORTANT NOTES:*** *Before editing the template, it is essential that the macro security in Microsoft Word is set to* ***Medium*** *via* ***Tools | Macro | Security****.*
>
> *It is also essential to check whether you are sharing a workstation with other users. If so, you are strongly advised to make a copy of the template (please see* Personalising The Quick Letter Template *on page* 41*).*
>
> *To prevent any existing letters being affected, it is essential that any existing* `QuickLetterTemplate.rtf` *file is not edited or deleted.*

Personalising The Quick Letter Template

If you are sharing a workstation with other users, you are strongly advised to create a copy of the quick letter template before editing it. This can then be personalised without affecting the templates of other SIMS users.

> *NOTE regarding Centrally Hosted SIMS Systems:*
>
> *The ability to have local copies of the quick letter templates should enable Terminal Server / Citrix installations to share the SIMS* `.net` *installation folder for all the schools on the server, saving much time and effort during upgrades to SIMS. Server administrators may wish to deploy appropriate copies of a school template to the My* `SIMS Documents` *folder for each user in a given school to enable this new facility.*

1. In Windows Explorer, navigate to the location of the template file, typically `C:\Program Files\SIMS\SIMS .net`.
2. Hold the **Ctrl** key and highlight the `QuickLetterTemplate.doc` and the `QuickLetterTemplate_enquiry.doc`.
3. Press **Ctrl**+**C** to copy the two files.
4. Navigate to your `My Documents\My SIMS Documents` folder.
5. Press **Ctrl+V** to paste the files.
6. Right-click the `QuickLetterTemplate.doc` and select **Rename**, then rename the file to `QuickLetterTemplate_local.doc`.

7. Right-click the QuickLetterTemplate_enquiry.doc and select **Rename**, then rename the file to QuickLetterTemplate_enquiry_local.doc.

   The template can now be edited as per your requirements, without affecting other SIMS users.

Editing the Quick Letter Template

1. In Windows Explorer, navigate to the location of the template file:
   - For users on a shared workstation, ensure that you have made a copy of the template and stored it in your My Documents\My SIMS Documents folder (please see *Personalising The Quick Letter Template* on page *41*). Navigate to this location and double-click the QuickLetterTemplate_local.doc to display the template in Microsoft Word.
   - For users on their own workstation, navigate to C:\Program Files\SIMS\SIMS .net, then double-click QuickLetterTemplate.doc to display the template in Microsoft Word.

   *NOTE: If the **Security Warning** dialog is displayed, please click the **Enable Macros** button.*

2. Make any necessary amendments to the QuickLetterTemplate.doc (or QuickLetterTemplate_local.doc), such as adding the school address and logo, your name etc. and save the changes.

   NOTE: It is not possible to add any additional fields from SIMS.

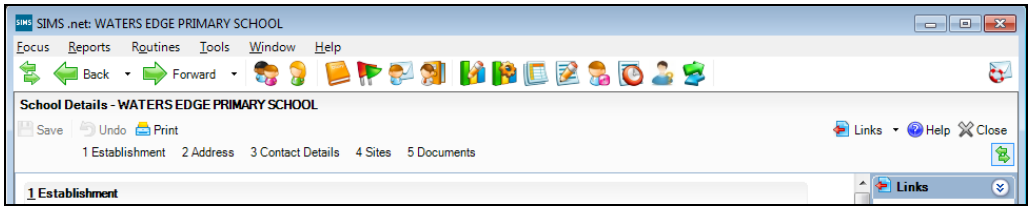
3. Click the **Save** button to save the template.

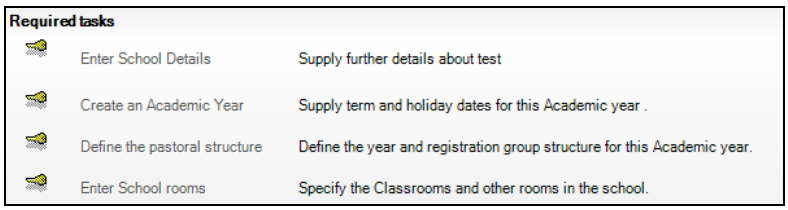
Recording / Editing School Details

It is essential that the school details are defined before using SIMS in earnest. This information is always required when producing annual school census returns and other Government returns, so it must be entered accurately.

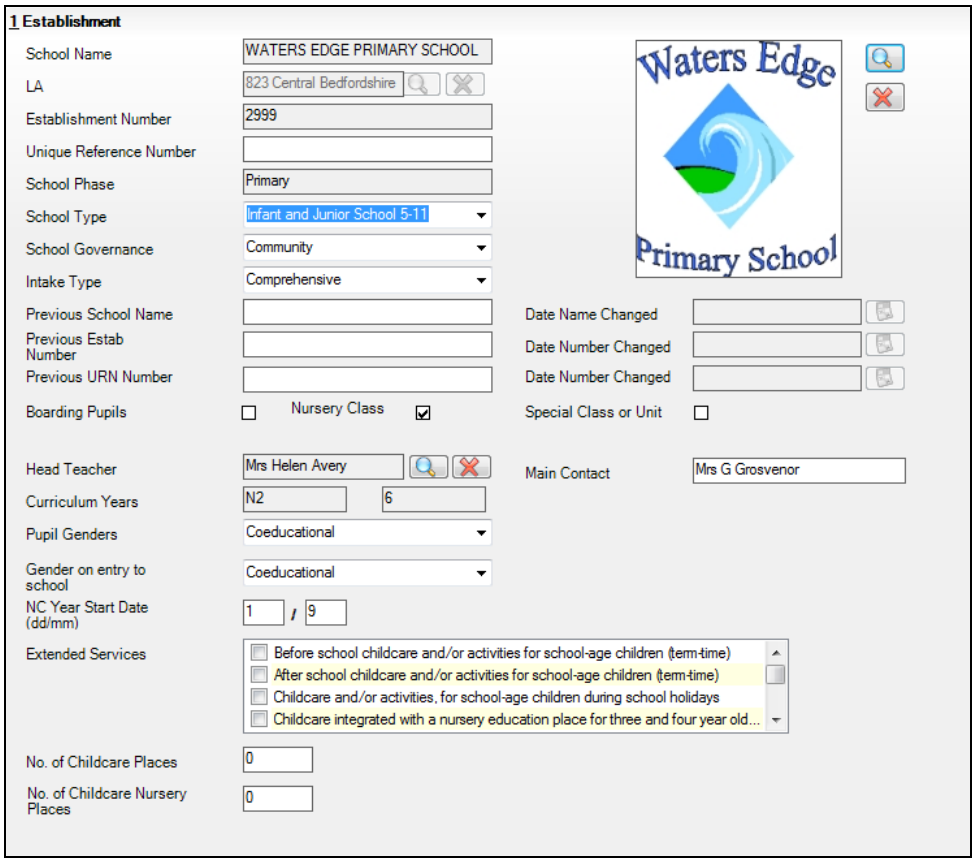
Once saved for the first time, some information on the **School Details** page cannot be edited. For instance, the information in the **School Name**, **LA**, and **School Phase** fields cannot be changed.

1. Select **Focus | School | School Details** to display the **School Details** page or click the **Enter School Details** hyperlink from the **Required Tasks** panel on the **Setup** page, if you are running this process immediately following the installation of SIMS.

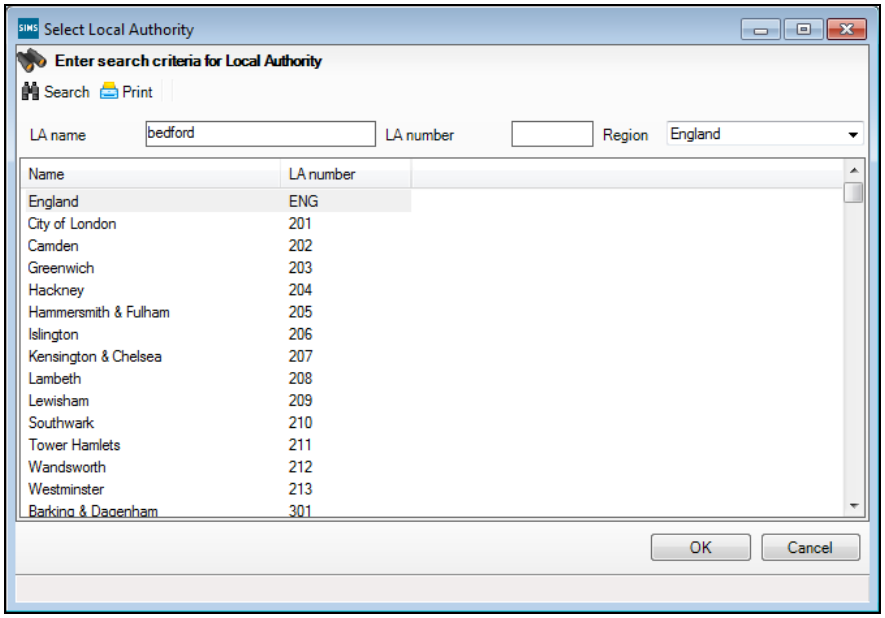




2. In the **Establishment** panel, enter your **School Name** (mandatory).



3. Specify the **LA** from which your school takes support by clicking the adjacent **Browser** button and selecting from the list displayed in the **Select Local Authority** dialog.



Enter the **LA name** or the associated **LA number** and click the **Search** button.

Highlight the appropriate LA from the list displayed and click the **OK** button.

4. Enter the **Establishment Number, Unique Reference Number** and the **UK Provider Reference Number** (if applicable).

   The **UK Provider Reference Number** is required for English Secondary Schools and Special School phases.

5. Enter the **School Phase**. This indicates the type of establishment, e.g. Nursery, Primary or Secondary school.

6. Select the **School Type**, **School Governance** and **Intake Type** from the appropriate drop-down lists.

7. Use the **Previous School Name**, **Previous Estab Number** and **Previous URN Number** fields to record historical details, if required, then enter or select the **Date Name Changed** and the applicable **Date Number Changed** fields.

   Information for Academies:

   Academies should ensure that the following information is recorded, if applicable:

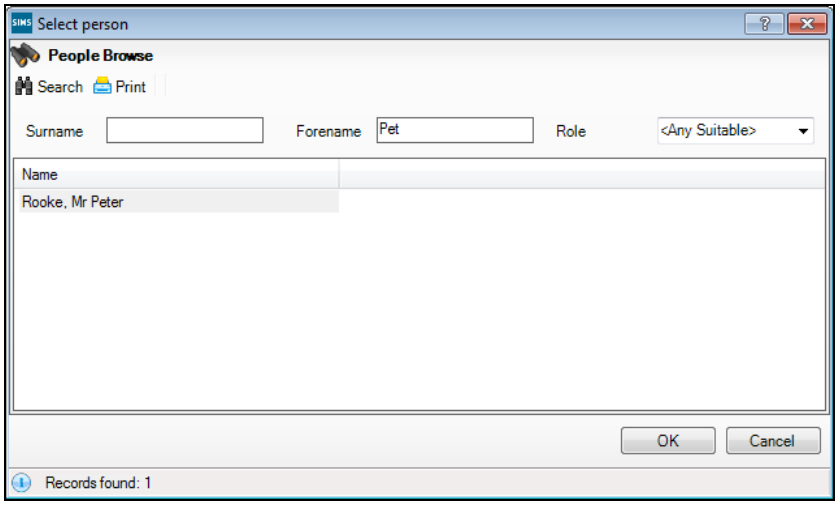
   - The **School Type** and **School Governance**.

     Select **Academies** from the applicable drop-down lists.
   - The school's **Previous Name** and **Date Name Changed**.
   - The **Previous Estab Number** and **Date Number Changed** (both used by the School Census).

> *NOTE for Sponsor-led Academies where the DfE number has changed: If applicable, the date of arrival is reported as the date the DfE number changed and historical information is not collected.*

- The **Previous URN Number** (used by other census returns) and **Date Number Changed**.

8. If the school accepts **Boarding Pupils**, has a **Nursery Class** or a **Special Class or Unit**, select the appropriate check box(es).
9. Click the **Browser** button adjacent to the **Head Teacher** field to display the **Select Person** dialog.



Enter a **Surname**, **Forename** or **Role** in the relevant fields and click the **Search** button. Only members of staff who have already been defined as teachers within SIMS are available for selection.

Highlight the required individual and click the **OK** button to save the details.

10. Enter the name of the **Main Contact** at the school.
11. Enter the spread of **Curriculum Years** that your school teaches, e.g. `7-13`.

    Year groups are automatically created for each National Curriculum Year that is selected.
12. Specify the **Pupil Genders** taught at your school by selecting from the drop-down list.
13. Select the **Gender on entry to school** and the **Gender on entry to 6th form** (if applicable) from the respective drop-down lists.

    The **Gender on entry to school** field enables users to change the school details if the intake type alters from single sex to co-educational and vice versa.

    The **Gender on entry to 6th form** field only applies to schools that have defined Years 12 and above. Some schools may have a single sex Sixth Form.
14. Enter the **NC Year Start Date (dd/mm)**. For example, entering `01/09` indicates that the start date of the National Curriculum Year will be 1 September.

15. Select the relevant check boxes from the **School Specialism** panel.

    This panel applies to English Secondary schools that have chosen to specialise in a particular subject area(s).

    Although specialist schools have a concentrated focus on their chosen subject area(s), they must continue to meet National Curriculum requirements and deliver a balanced education to their students.

    Schools are able to select any two specialist subjects from the options available.

16. Select the relevant check boxes from the **Extended Services** panel.

    This panel applies to schools that provide additional services outside of normal school opening hours.

    These services may be community oriented or designed to allow parents some flexibility when dropping off and picking up their children by offering breakfast clubs or after school homework clubs, etc.

    Schools are required to record all additional services that they provide on site and can select any number of options from those available.

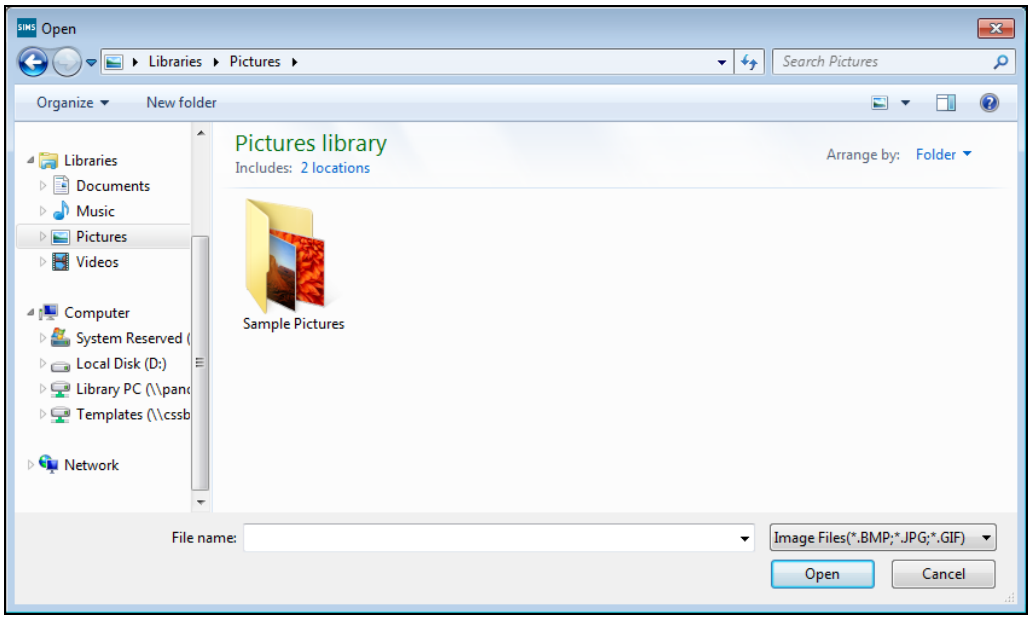
17. Enter a figure in the **No. of Childcare Places** field.

    This field must be completed if schools provide an extended service of child care or extra curricular activities.

    Schools with nursery age children must enter the number of places that are available for nursery age children between the hours of 8am and 6pm.

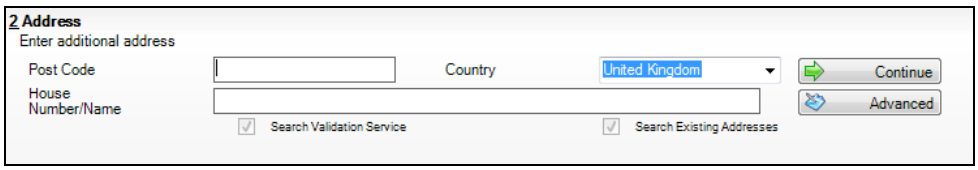
    Schools with school age children must enter the number of places that are available for school age children between the hours of 8am and 6pm.

18. Click the **Browser** button on the far right-hand side of the page to display a standard Windows® **Open** dialog. Navigate to the location where your school's logo is stored. Double-click on the image to populate the logo field.



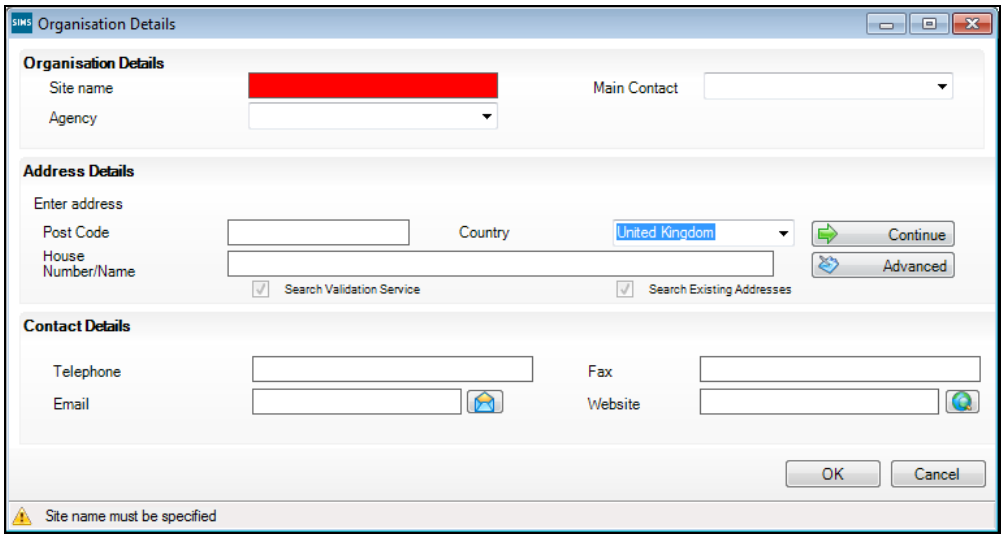
> *NOTE: The logo is not visible until the **Save** button has been selected and the page has been closed and opened again through **Focus | School | School Details**.*

19. Click the **Address** hyperlink to display the **Address** panel.



20. Add the school address.
21. Click the **Save** button to save the details.
22. In the **Contacts Details** panel, enter the **Telephone** and **Fax** numbers in the relevant fields.

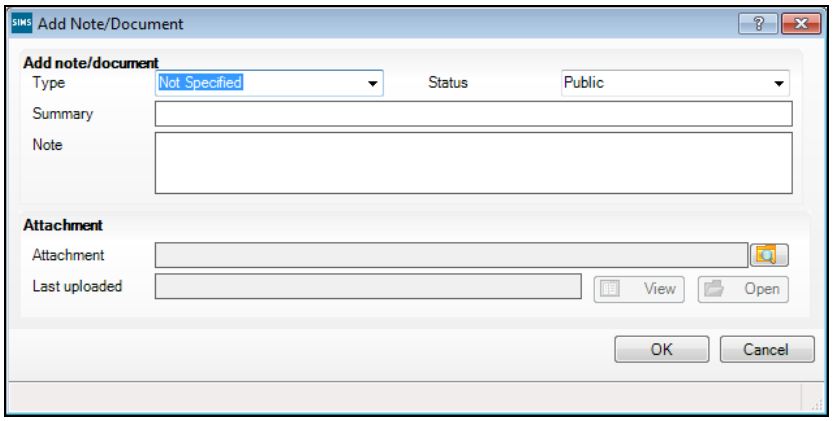
23. Enter the central school **Email** address and an http address for the school's **Website**, if one has been established.
24. In the **Sites** panel, click the **New** button to display the **Organisation Details** dialog and enter a **Site name**.



25. Select an **Agency**, and **Main Contact** from the drop-down lists.
26. Add the school address in the **Address Details** panel.
27. In the **Contact Details** panel, enter the **Telephone** and **Fax** numbers together with the school **Email** and **Website** address if available.
28. Click the **OK** button, in order to display the **Schools Details** page.

Adding Note / Document

1. In the **Documents** panel, click the **New** button to display the **Add / Note Document** dialog. The **Documents / Notes** panel is used to record any additional information relating to the school.

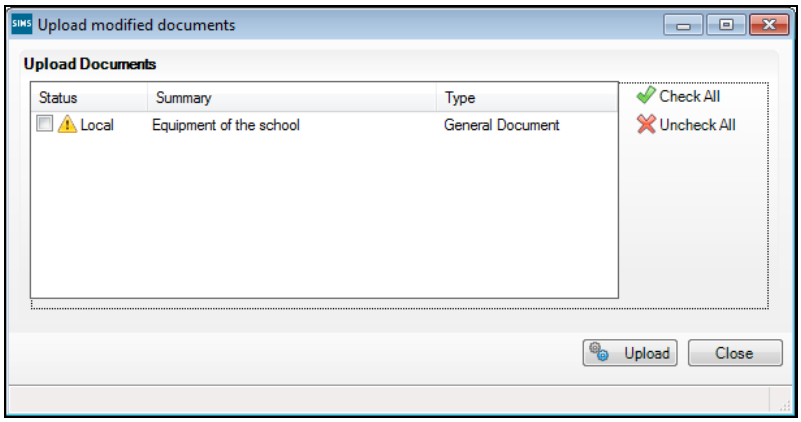


2. Select the **Type** of Document from the drop-down list. The **Type** defaults to **Not Specified**.
3. Select the **Status** of the note/document from the drop-down list.
   - **Public** – the note/document is available to all users who have sufficient add/view/edit permissions.
   - **Private** – the note/document is available only to you.
   - **Confidential** – the document is available to SIMS users with School Administrator or Senior Management Team permissions.
4. Enter a **Summary** and a **Note** relating to the contents of the Document. These may help in future, if the document ever becomes orphaned.
5. Click the **Browser** button and navigate to the location of an **Attachment**. This could be a copy of your school's prospectus, for example.
6. Click the **OK** button to save the attachment.
7. In the **Add Note / Document** dialog, the **Last uploaded** field remains empty until the record is saved. You can then view the date and time of the last file upload, together with the name of the user who uploaded it.

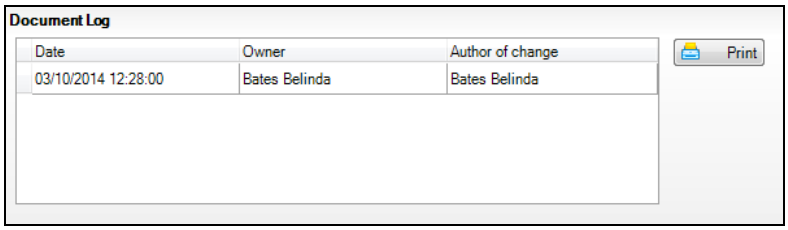
   The **View** button adjacent to the **Last uploaded** field enables users with insufficient permissions to simply read the contents of the attachment. These users are not able to amend or edit attachments.

> *NOTES: The **Upload modified documents** dialog will not be displayed, unless you click the **Save** button in **Schools Details** page.*

The **Open** button enables users with sufficient permissions to read, amend and edit attachments. When the record of an amended attachment is saved, then click the **Save** button in the **Schools Details** page so to display the **Upload modified documents** dialog. Select the **Status** check box then click the **Upload** button to upload the amended copy of the attachment. Click the **Close** button to close the dialog.



The **Document Log** panel at the bottom of the **Edit Note/Document** dialog records the **Date**, original **Owner** of the document and the **Author of change** for any amended attachments. The log can be printed for future reference by clicking the **Print** button. This panel is available only when you **open** an existing note/document from the **School Details** page.



Click the **OK** button to display the **Schools Details** page.

8. Click the **Save** button.

Recording Childcare Information

1. Click the **New** button in the **Childcare** panel to display the **Update Childcare Details** dialog.
2. Enter the applicable details.
   - **Type** - select the type of childcare being provided from the drop-down list:
     - **Before School Childcare**
     - **After School Childcare**
     - **Holiday Childcare**
     - **Under Fives Childcare**.
   - **Site** - select as applicable from the drop-down list:
     - **On site** - select this option if childcare is being provided on the school premises.

- **Off site** - select this option if childcare is undertaken off the school premises, i.e. your school promotes or point parents towards a regular off-site childcare service, e.g. a private or voluntary organisation.

> *NOTE: If **Off site** is selected, the applicable **Signposted** option must also be selected but additional information, e.g. opening/closing times, number of childcare place, etc. are not required.*

- **Signposted** - If there is a regular **Off site** service that the school promotes or signposts parents towards, one of the following options must be selected:
  - **Yes, formal arrangements including transport** - Select this option if your school has formal arrangements with another provider who provides childcare for your pupil/students including transport to their site.
  - **Yes, list of providers that pick up from school** - Select this option if a list of local providers who will pick up pupil/students from the school to help parents is provided.
  - **No**
  - **Not Known**
- **Opening Time** - enter the time that the service becomes available.

> *NOTE: Ensure that the time is entered in 24 hour format. A colon should be entered between the hours and the minutes, e.g. 07:00.*

- **Closing Time** - enter the time that the service closes.

> *NOTE: Ensure that the time is entered in 24 hour format. A colon should be entered between the hours and the minutes, e.g. 17:30.*

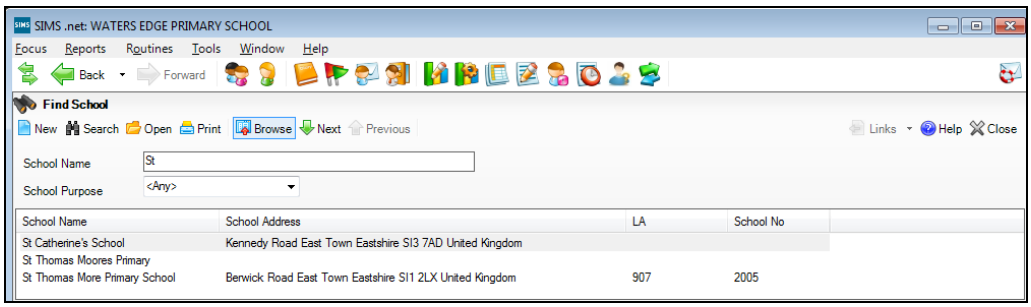
- **No of Childcare Places** - enter the maximum number of childcare places that the service can provide.
- **Provider** - select the description from the drop-down list that most accurately describes the provider of the service:
  - **School**
  - **School in Partnership** (with another provider)
  - **Other (non-school) Provider**.
- **Other Schools** - is the service made available to children from other schools? Select as applicable from the drop-down list:
  - **Yes**
  - **No**
  - **Unknown**
- **Weeks Open** - enter the number of weeks for which childcare is provided.

3. Click the **OK** button to return to the **School Details** page.
4. Repeat the process to record additional childcare records, if required.

Adding / Editing Other Schools

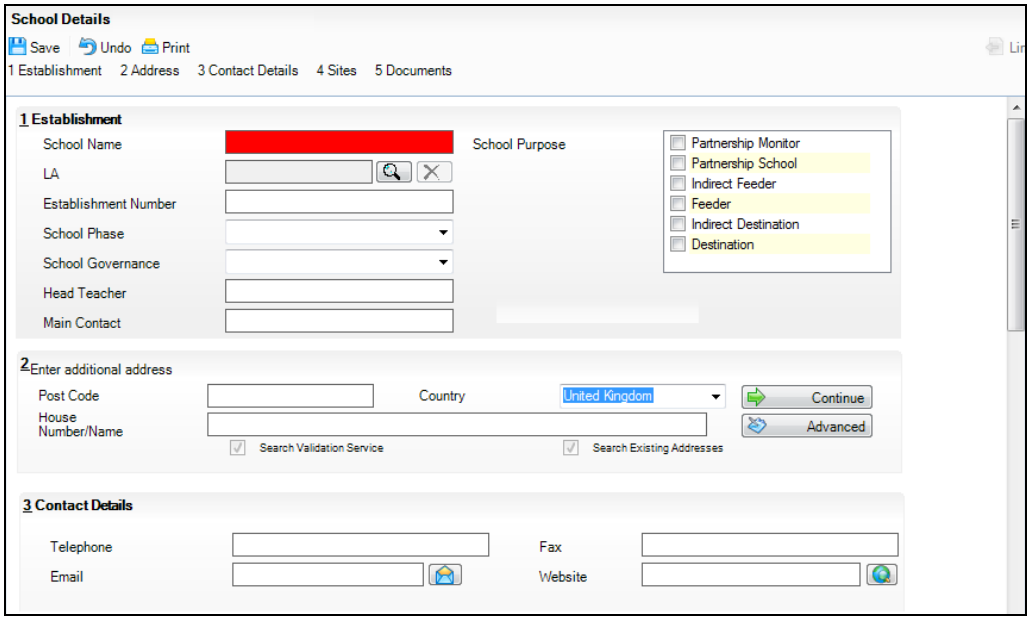
It is necessary to add various schools to SIMS. These schools can include previous schools attended by pupil/students, feeder schools (that need to be added in order to import CTFs) or other schools in your area that you correspond with on a regular basis with regard to local procedures or educational issues.

1. Select **Tools | Other Schools** to display the **Find School** browser.

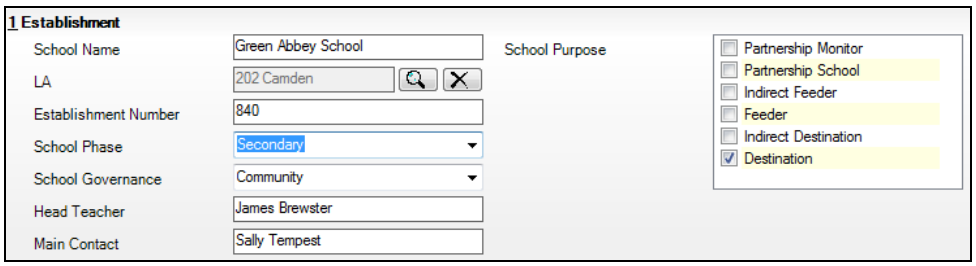


> *NOTE: It is also possible to add other schools from the **School History** panel of a pupil/student or applicant page by clicking the **New** button.*

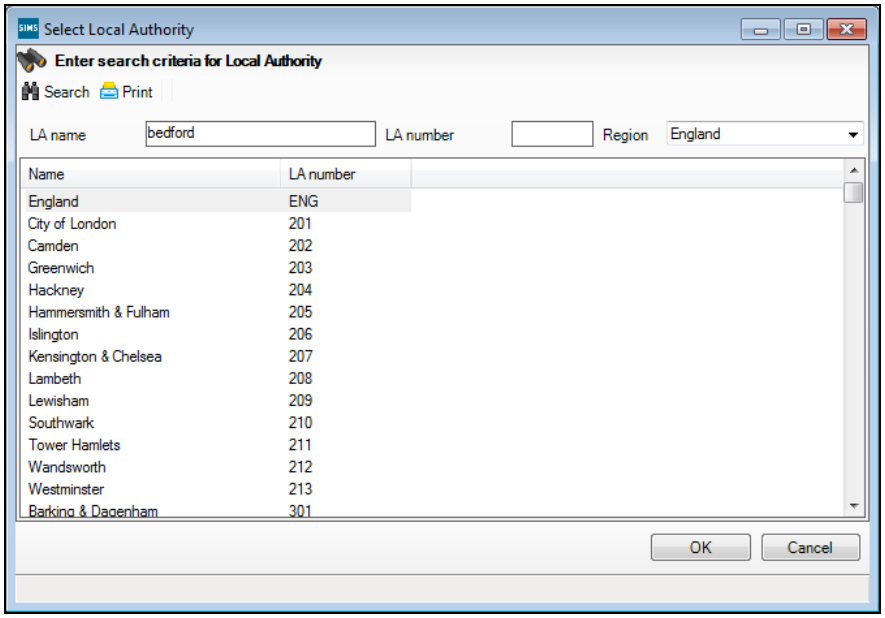
2. Click the **New** button to display the **School Details** page.



3. Enter the **School Name** (mandatory) and select the applicable check boxes in the **School Purpose** section, e.g. **Feeder**, **Destination**, etc. Additional categories can be added to this field via the **Tools | Lookups | Maintain** menu route (please see *Adding/Editing Other Schools* on page *51*).



4. Click the **Browser** button to display the **Select Local Authority** dialog. Search for and highlight the required LA then click the **OK** button to select them.



5. Enter the **Establishment Number** for the new school, if required.

> *NOTE: This field must be completed if this school is a Destination school for exporting Common Transfer Files.*

6. Select the **School Phase** from the drop-down list, e.g. **Secondary**.
7. Select the **School Governance** from the drop-down list.
8. Enter the **Head Teacher** and **Main Contact** names.
9. Add the school address in the **Address** panel.
10. In the **Contact Details** panel, enter the **Telephone** and **Fax** numbers together with the school **Email** and **Website** address if available.
11. If you would like to insert additional school sites for your school, click the **New** button in the **Sites** panel to display the **Organisation Details** dialog.

12. Complete the fields of the **Organisation Details**, **Address Details**, and **Contact Details** panels as required (please see *Recording/Editing School Details* on page *42*).
13. Click the **OK** button, in order to display the **Schools Details** page.
14. You can attach any documents to the school (such as maps, school prospectus, etc.), by clicking the **New** button on the **Documents** panel (please see *Adding Note/Document* on page *48*).
15. Click the **Save** button on the toolbar to add the school.

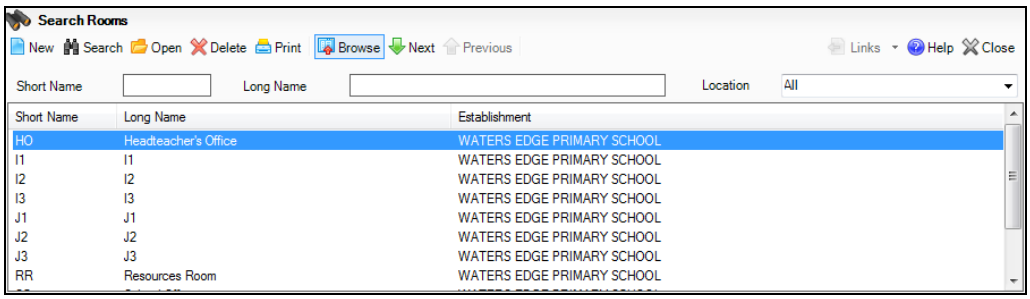
Additional Resources:

Using the Pupil/Student Links Panel chapter in the *Managing Pupil/Students* handbook

Adding/Editing Rooms

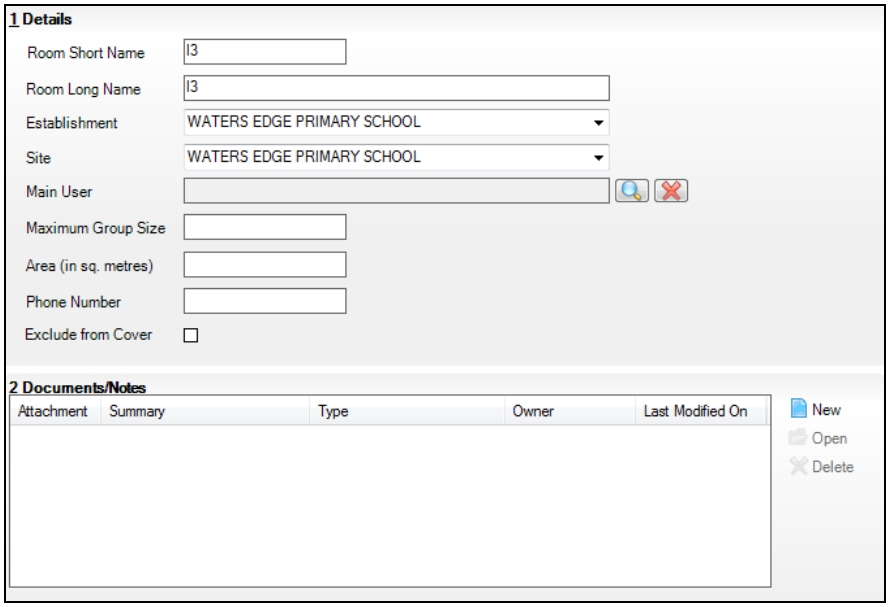
A room in SIMS is classified as any area where an activity takes place. This could be a classroom, lecture theatre, library or even a sports field. It is necessary to add rooms into SIMS so that classes can be timetabled to take place in them and the location of individual pupil/students and staff members can be ascertained at any point throughout the course of the school day.

1. Select **Focus | School | Rooms** to display the **Search Rooms** browser.

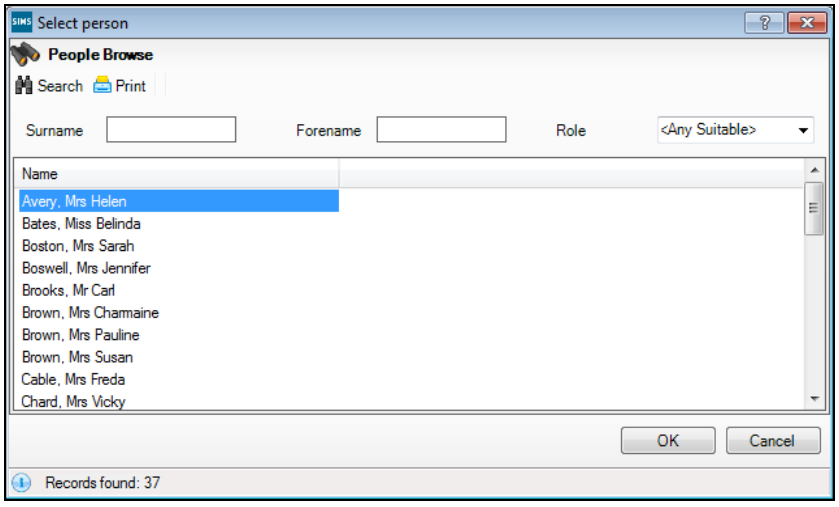


2. Enter the **Short Name** or **Long Name** of the room or select its **Location** from the drop-down list. Alternatively, leave all the search criteria blank to display all rooms recorded in SIMS.
3. Click the **Search** button to display all the rooms that match the search criteria entered.

4. Highlight an existing room then click the **Open** button or click the **New** button to display the **Room Details** page.



5. Enter the **Room Short Name**. This should be an abbreviation of the **Room Long Name** and must be unique for each room, e.g. `A1` for `Art Room 1`.
6. Enter the **Room Long Name**. This should be the full name of the room as it is known in your school.
7. Select the **Establishment** and the **Site** where the room is located from the drop-down lists.
8. Specify the **Main User** of the room by clicking the **Browser** button to display the **Select person** browser.



   a. Enter the **Surname** or **Forename** of the required person.
   b. Select their **Role** of the room from the drop-down list.
   c. Click the **Search** button to display all the people who match the search criteria entered.

d. Highlight the required person then click the **OK** button to return to the **Room Details** page.

9. To remove a **Main User** added in error, click the adjacent **Delete** button.
10. Enter the room's capacity in the **Maximum Group Size** field. This can be used to ascertain whether a room is large enough to hold the intended number of people.

> ***IMPORTANT NOTES:*** *If you change the value in the* ***Maximum Group Size*** *field, when the record is saved you will be notified that the change may not take effect until all users restart SIMS.*
>
> *If this room is used for a detention, the* ***Optimum Number Of Attendees*** *field in the* ***Details*** *panel of the* ***Detention Details*** *page defaults to the value set in the* ***Maximum Group Size*** *field for all new detention sessions.*

11. Enter the size of the room in the **Area (in sq. metres)** field. This can be used to assist with the school's building insurance quotation or used in conjunction with your school's fire regulations.
12. Enter the **Phone Number** for the room, if applicable. This could be an internal extension number.
13. Leave the **Exclude from Cover** check box deselected if you want this room to be considered as an alternative location for any class or activity that needs to be moved from its original location.

    The **Documents/Notes** panel is used to record any additional information relating to the room.
14. Highlight an existing item then click the **Open** button to display the **Edit Note/Document** dialog or click the **New** button to display the **Add Note/Document** dialog.
15. Complete the fields of the **Add Note/document** and **Attachment** panels (please see *Adding Note/Document* on page *48*).
16. Click the **Save** button.

Setting Up School Options

Changes can be made to customise SIMS based on your school's needs.

Select **Tools | Setups | School Options** to display the **School Options** page.

Showing/Hiding the Home Language Field

The **Home Language** fields in SIMS can be removed, as the information is no longer collected by the Census.

Navigate to the **School Options** panel. Select or deselect the check box adjacent to **Hide Home Language** as required, then click the **Save** button. Any change made is implemented immediately.

03 | Creating an Academic Year

Introduction 57
Defining an Academic Year 57

Introduction

This chapter describes how to create an academic year in the future including adding school terms, half term holidays, together with dates for public holidays and staff training days, etc.

Defining an Academic Year

This process defines the start and end dates for each of the school terms and half-term holidays, together with dates for public holidays and staff training days. If SIMS Attendance is in use, appropriate attendance records are created for each pupil on the dates entered.

IMPORTANT NOTES:

Due to the amount of processing resource required to create an academic year, whilst not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. Continuing to work whilst an academic year is being created is likely to result in error messages.

Please be aware that the process can take anything up to 20 minutes while the system creates attendance records for the new academic year.

When creating an academic year, the start date of the first term is deemed to be the first day of the academic year. This may not necessarily be the day that pupils arrive in school, it could be an INSET day for example. An end date is calculated for 365 days later. For example, if the academic year starts on 02/09/09 then an end date of 03/09/10 is automatically supplied.
The first day of term should be specified even if pupils are not in attendance.

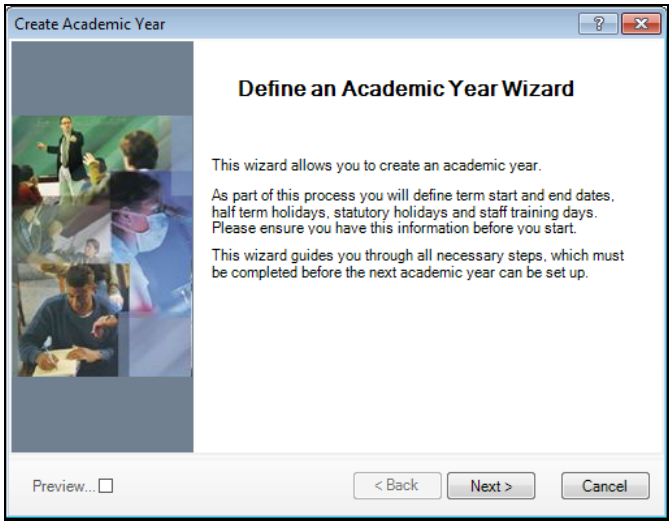
Any dates within the start and end dates of the academic year that are not term dates or training days, are considered to be holidays. This prevents the need to manually enter holidays (apart from half-terms and bank holidays).

Promotion into new year groups, etc. occurs automatically on the first day of the first term of the new academic year (providing that the promotion process has been carried out).

Before proceeding, please check that you have carried out the following:

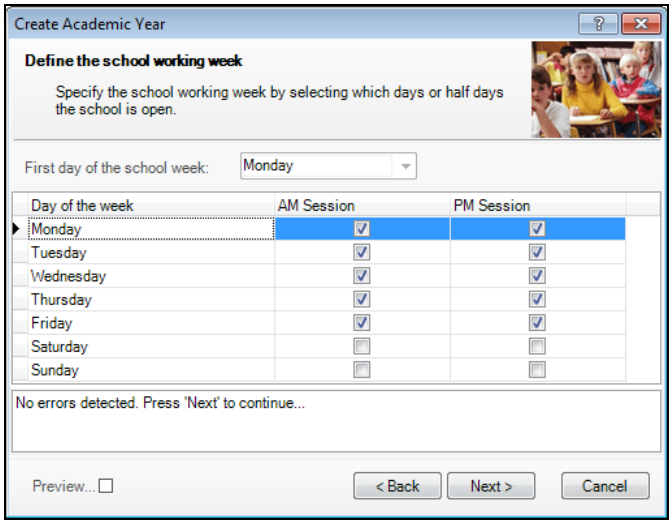
- Recorded any changes to teaching staff (adding any new teachers and dates of leaving for any leavers).
- Ensured that you have the new academic year term dates, training days, etc. to hand.

1. Select **Routines | School | Academic Year** to display the **Create Academic Year** dialog.



2. Click the **Next** button to display the **Define the school working week** page.

Defining the School Working Week



The **First day of the school week** drop-down list is read-only and displays the first day of your school week as specified when your system was first set up.

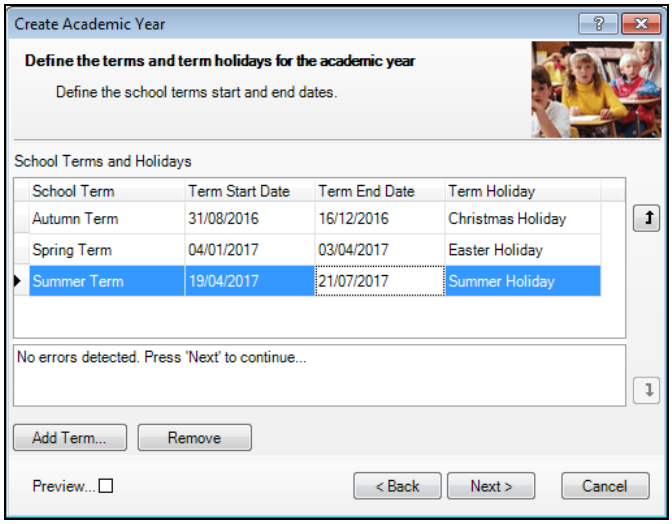
1. Define the days when the school is open by selecting the relevant check boxes adjacent to each day including both **AM** and **PM Sessions** as required. **AM Session** and **PM Session** check boxes are selected by default for Monday through to Friday.

> *NOTE: Boarding schools will need to select all fourteen sessions if they wish to include weekend registration.*

2. Click the **Next** button to display the **Define the terms and term holidays for the academic year** page.

Defining School Terms

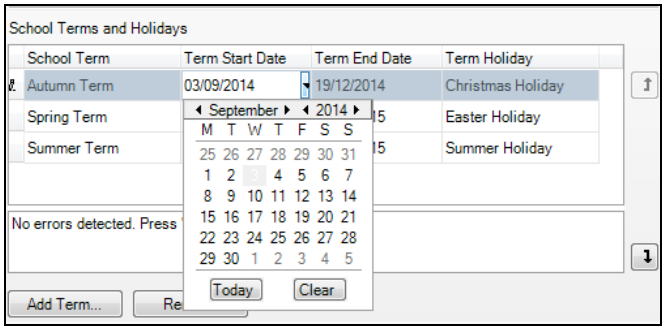
When entering term dates, the start date should always be the date the term starts, even if pupils are not in school on those days.



1. Enter the dates for the Autumn, Spring and Summer terms by clicking in the applicable **Term Start Date** and **Term End Date** fields and entering the dates in dd/mm/yyyy format.

> *NOTE: Schools who have more than three terms in their academic year will need to add additional terms (please see* Adding Additional School Terms *on page* 60*).*

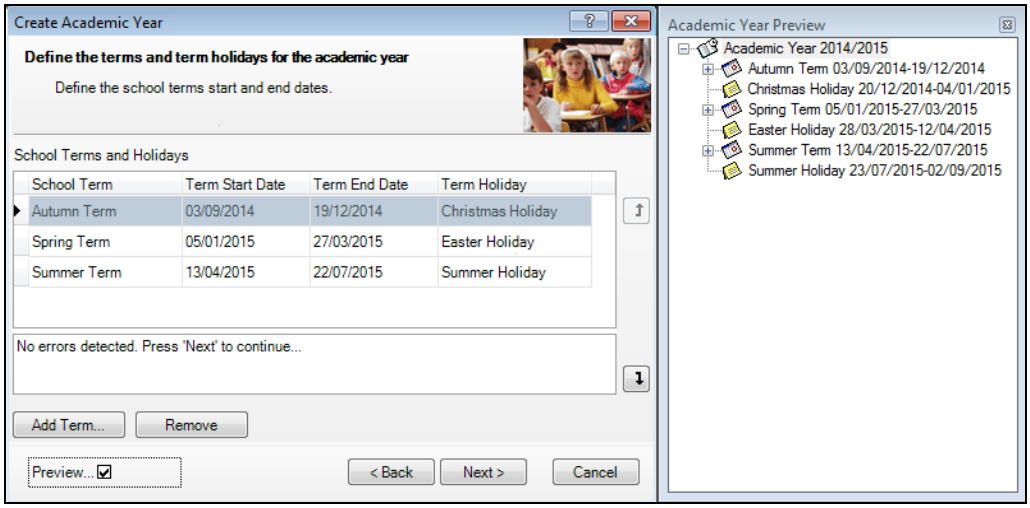
Alternatively, click in the date cell until a down arrow is displayed, then click the arrow to display a calendar from which the required date can be selected.



> *NOTE: You can overtype the name of the term in the **School Term** column if a different name is preferred.*

2. Each term has a default holiday displayed in the **Term Holiday** column. If required, select a different holiday from the drop-down list or manually type a new holiday name.
3. Repeat this process for all the default terms displayed, selecting the applicable holiday for each term. Any errors are displayed in the lower section of the wizard and must be resolved before you can proceed.
4. If you are happy with the default three school terms, click the **Next** button to display the **Define the half-term holidays** page.

> *NOTE: If the **Next** button is greyed out, move the cursor off the last **Term End Date** by pressing the **Tab** key.*



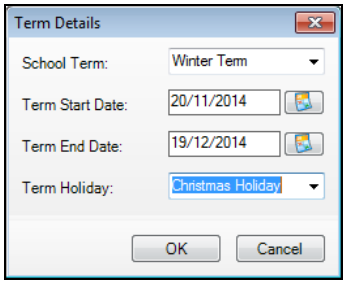
At this point onwards, you can select the **Preview** check box on the wizard to display the preview panel on the right of the wizard. The preview panel will update based on the selections you make throughout the wizard. Deselect the **Preview** check box whenever you want to hide the preview panel.

Adding Additional School Terms

Some schools may wish to add additional terms, if for example your school has four or six terms in an academic year. The following example shows the addition of a Winter term.

> *NOTE: When adding terms, the start date should always be the date the term starts, even if pupils are not in school on that day.*

1. From the **Define the terms and term holidays for the academic year** page of the wizard, click the **Add Term** button to display the **Term Details** dialog.



2. Select the term name from the **School Term** drop-down list. If the required name does not exist, enter a name manually e.g. **Winter Term**.
3. Enter the **Term Start Date** and **Term End Date** for the term in dd/mm/yyyy format. Alternatively, click the **Calendar** button and select the required dates from the calendar.

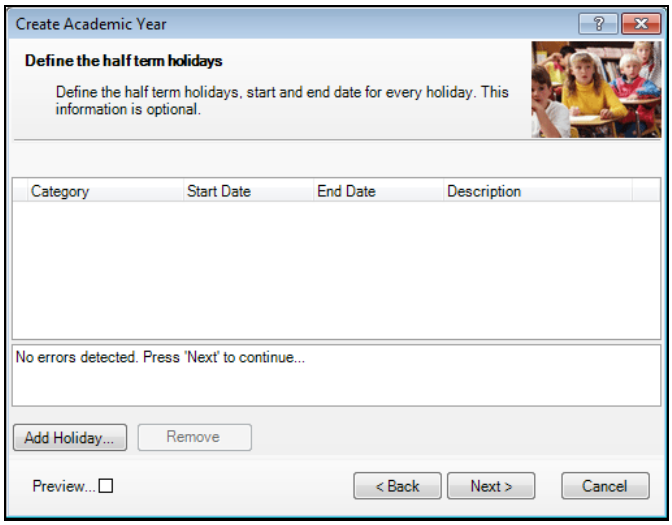
Calendar button

4. Select the holiday that will follow the term from the **Term Holiday** drop-down list, e.g. **Christmas Holiday**. If the required name does not exist, enter the holiday name manually.
5. Click the **OK** button to add the term.
6. Repeat for any other additional terms that may be required.
7. Click the **Next** button to display the **Define the half term holidays** page.

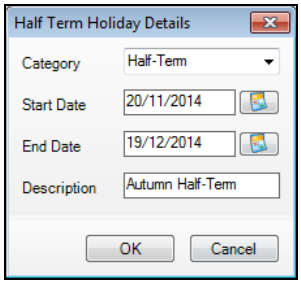
Defining Half Term Holidays

Holidays are automatically created for the dates in between the term dates entered. For example, if the Spring term ends on 01/04/2010 and the Summer term starts on the 19/10/2010, then it is assumed that the dates in between are holidays. In addition however, you need to enter the dates for half term holidays.

NOTE: You do not need to define half term holidays if you have created a six term academic year where the half-term dates fall between the terms.

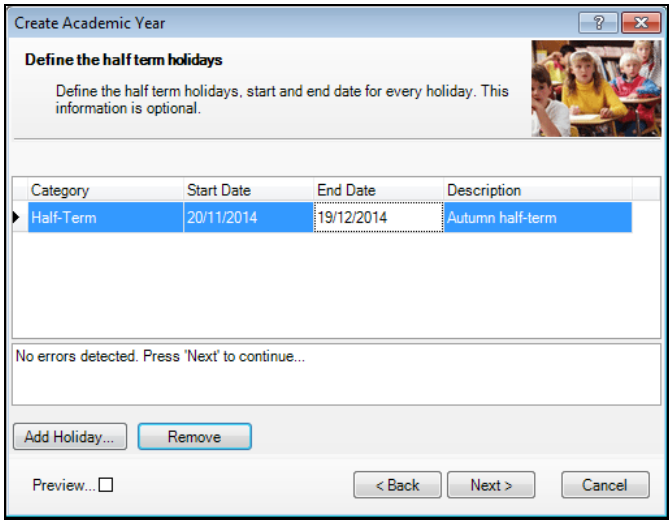


1. From the **Define the half-term holidays** page, click the **Add Holiday** button to display the **Half Term Holiday Details** dialog.



2. Select **Half-Term** from the **Category** drop-down list.
3. Enter the **Start Date** and **End Date** for the half term holiday in dd/mm/yyyy format. Alternatively, click the **Calendar** button and select the required dates from the calendar.
4. Enter a **Description** for the half term holiday if required, such as `Autumn Half-term`. This description is displayed in the **School Diary**.

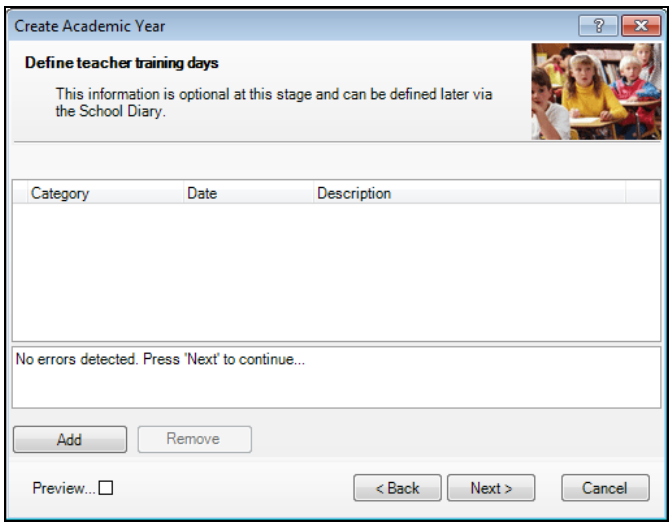
5. Click the **OK** button to add the half term holiday. Repeat for all the required half term holidays.



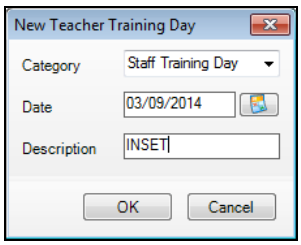
6. Click the **Next** button to display the **Define teacher training days** page.

Defining Teacher Training Days

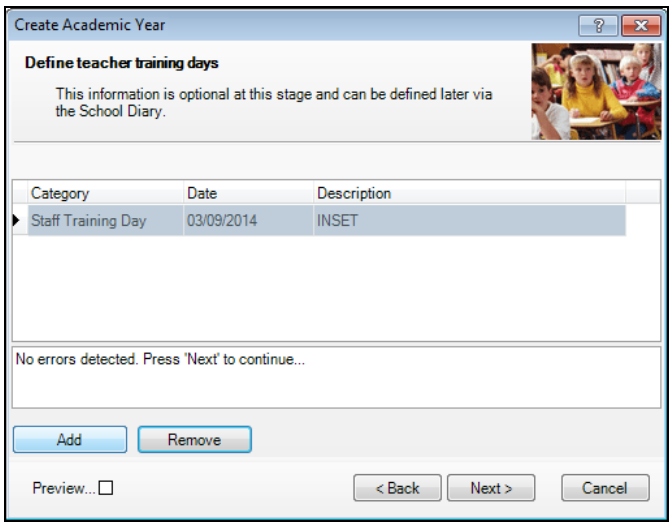
The **Define teacher training days** page is used to enter any training days where pupils will not be attending school. It is advisable to enter any known INSET days at this point. Alternatively, they can be added later via the School Diary (please see *Adding/Editing Events* on page *113*).



1. From the **Define teacher training days** page, click the **Add** button to display the **New Teacher Training Day** dialog.



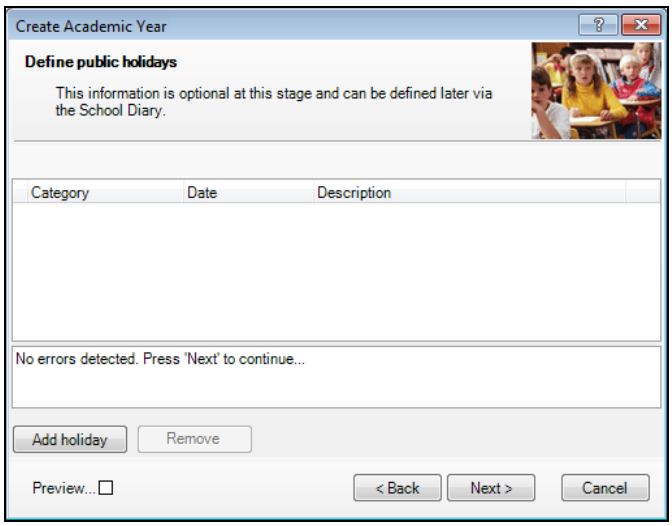
2. Select **Staff Training Day** from the **Category** drop-down. If the required category name does not exist, enter the name manually.
3. Enter the **Date** of the training day in dd/mm/yyyy format or click the **Calendar** button and select the date.
4. Enter a relevant **Description** if required, such as **INSET** to ensure that the type of training can be identified. The description is displayed in the **School Diary**.
5. Click the **OK** button to add the teacher training day. Repeat for any other required teacher training days.



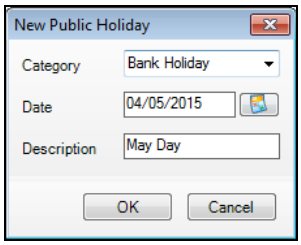
6. Click the **Next** button to display the **Define public holidays** page.

Defining Public Holidays

In addition to other dates, you will also need to specify any public holidays such as Bank Holidays, particularly those that occur during a term.

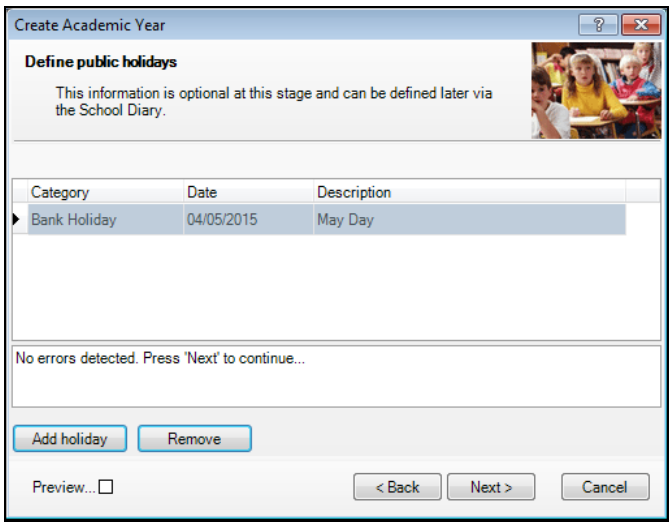


1. From the **Define public holidays** page, click the **Add Holiday** button to display the **New Public Holiday** dialog.



2. Select **Bank Holiday** from the **Category** drop-down list. If the category name does not exist, enter the name manually.
3. Enter the **Date** of the public holiday in dd/mm/yyyy format or click the **Calendar** button and select the required date.
4. Enter a relevant **Description**, such as May Day. The description is displayed in the **School Diary**.

5. Click the **OK** button to add the public holiday. Repeat for any other required public holidays.

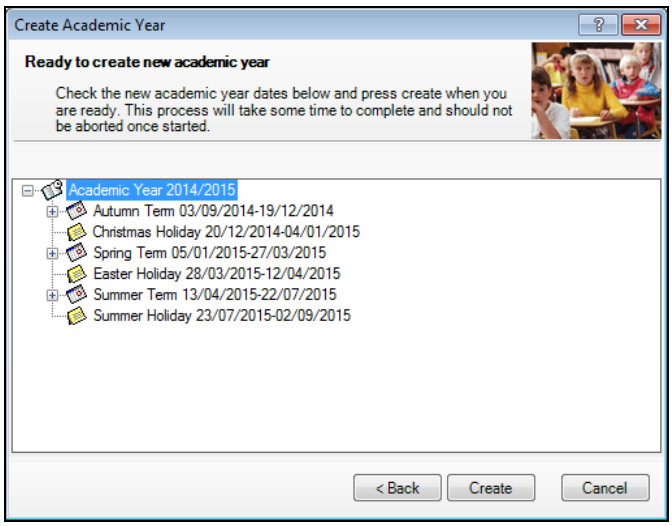


6. Click the **Next** button to display the **Ready to create new academic year** page.

Creating the New Academic Year

Whilst it is not essential, it is strongly recommended that all other users log out of SIMS before commencing this process. This is because a large amount of processing resource is required to create an academic year.

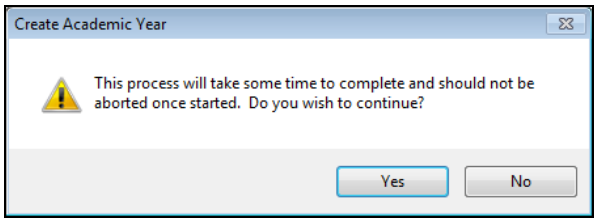
Please be aware that the process can take anything up to 20 minutes while the system creates attendance records for the new year.



1. A summary of the data entered is displayed in the **Ready to create new academic year** page. The detail can be expanded by clicking the applicable **+** icon. Check this information carefully for any errors or inaccuracies.

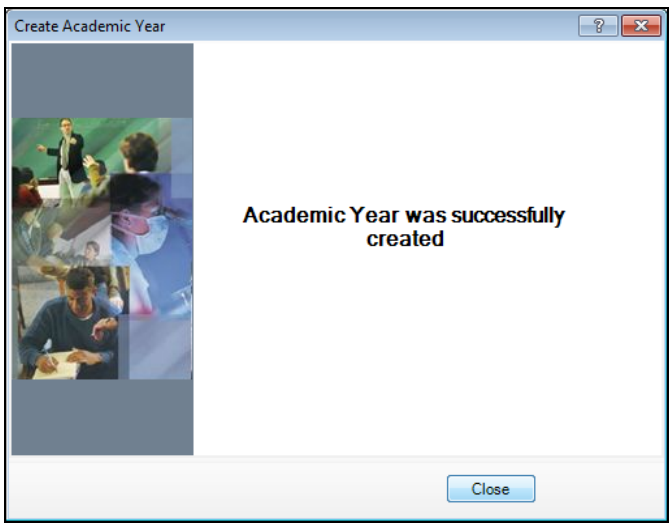
   Once you are sure the information is correct, click the **Create** button to create the new academic year. If there are any anomalies in your settings, a warning message will ask you to confirm whether you wish to proceed or review your settings. Ensure that you are confident the data is correct before proceeding.

   The following warning message is displayed.

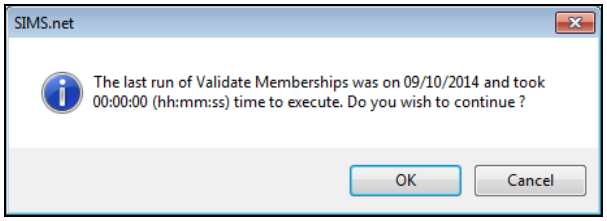


   Progress is displayed via a progress indicator at the bottom of the wizard.

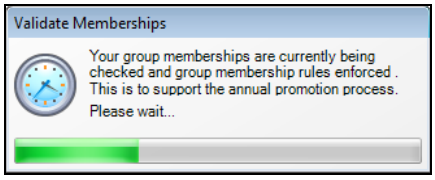
   Once complete, the wizard will display the following page.



2. Click the **Close** button to close the wizard and complete the process.



3. Click the **OK** button to display the **Validate Memberships** dialog.



04 | Setting Up Admissions

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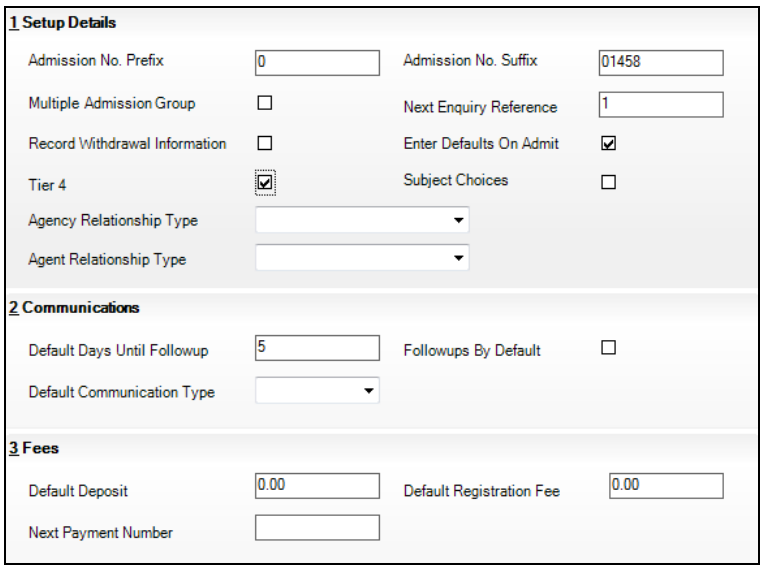
Introduction

This chapter describes how to set up SIMS to suit your admissions process including setting up admissions defaults and the creation of intake/admission groups. You may also want to review the default lookups which define certain values that appear in various admissions drop-down lists, such as Admission Season, Application Status, etc (please see *Importing and Maintaining Lookups* on page *151*).

Setting up Admissions Defaults

Select **Tools | Admissions | Defaults** to display the **Setup Details** page.



*NOTE: The **Communications** panel is visible only to users with a Full Admissions Licence or Independent schools.*

Configuring Admission Numbers

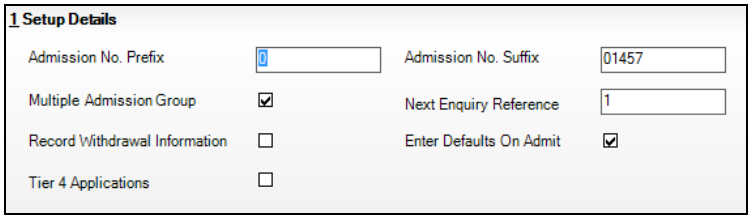
An admissions number in SIMS is a six, alphanumeric character string. It consists of a single alphanumeric prefix, followed by a five digit number in the range 00000-99999. A unique admissions number is allocated to each applicant when they are admitted to the school, e.g. **A12345**.

Admission No. Prefix defaults to **A** in a newly installed site. Edit this value as required.

Admission No. Suffix defaults to **00000** for a newly installed site. Edit this value as required.

Using Multiple Admission Groups

It is possible to create an intake group which contains one or more admission groups. For example, in a Primary school an intake group could be created for the Nursery which contains separate admission groups for those joining in the Autumn, Spring and Summer terms. In a Secondary school, an intake group could be created for Year 7 with admission groups for either Feeder Schools or Registration Groups.



The use of multiple admission groups (as shown in the previous graphic) is optional by selecting or deselecting the **Multiple Admission Group** check box as required.

If you elect not to use multiple admission groups, the admission group is automatically created when the intake group is added.

> *NOTE: If you change this setting, you will need to restart SIMS before the change takes effect.*

Configuring Enquiry Reference Numbers

This facility enables you to define how the enquiry reference number is generated. The number is displayed as a 10 digit number with leading zeros (1 is the initial default for a new installation – there is no need to enter leading zeros) and is incremented by 1 for each enquiry. The initial number can be changed if required by entering a different value in the **Next Enquiry Reference** field.

Supplying a Reason for Withdrawal

If an applicant withdraws from the application process, you may wish to capture a reason for the withdrawal and the school the applicant has accepted a place at. The default is this information is not mandatory, but if you wish to capture this information, select the **Record Withdrawal Information** check box. The **Edit Withdrawal Reasons** button will then be enabled on the **Application Details** page.

Using Tier 4 Applications

Select the **Tier 4** check box if you wish to record this information. Once this has been selected, a Tier 4 Application record can be created and the **CAS Reference** (Confirmation of Acceptance for Studies) can be recorded via the **Application** page (**Focus | Admission | Application**).

Only schools that accept foreign nationals (requiring a VISA) as pupil/students need to manage the application of these pupil/students. This functionality assists schools in tracking this type of application. Schools can decide whether or not the fields associated with Tier 4 applications are displayed.

Additional Resources:

Recording Tier 4 Application Information in the *Managing Applications to your School* chapter of the *Managing Pupil/Students* Handbook

Using Subject Choices

When prospect students apply to the school for Sixth form and GCSE they will normally apply for Subjects. Select the **Subject Choices** check box if you want to record the subjects they are applying for to enable further analysis. Once you select this check box, the **Subject Choices** table becomes available in the **Registration Details** panel of the **Application** page.

Additional Resources:

Adding/Editing Subject Choices topic in the *Managing Applications to your School* chapter of the *Managing Pupil/Students* handbook

Adding/Editing Subject Choices topic in the *Recording Applications to your School* chapter of the *SIMS Admissions for Independent Schools* handbook

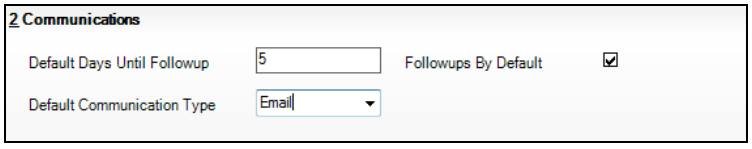
Agency/Agent Relationship Type

Select a default **Agent Relationship Type** and **Agency Relationship Type** from the drop-down lists.

The options available from these drop-down lists are controlled by lookups. The lookup values can be edited using the **SEN Linked Adult Relation Type** and **Agency Student Relationship Type** lookup tables respectively. You are advised to set up look up values in SIMS for any agent/agency relationship types that are required and to ensure that these are active.

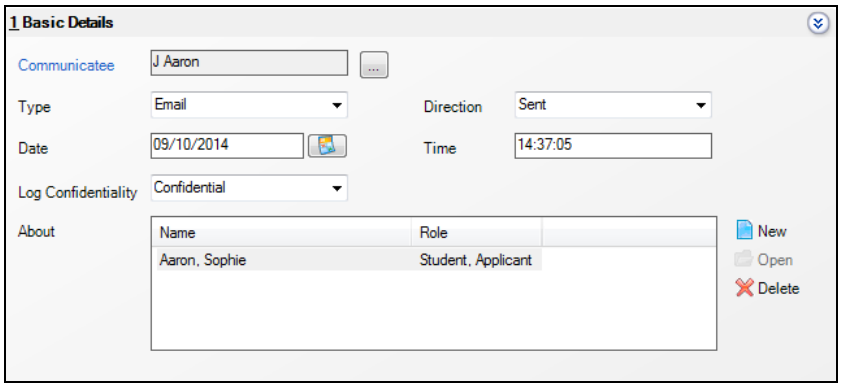
Setting up Communications

The **Communications** panel will only be visible to users who have an Own Admission Authority Full Licence or Independent licence (not applicable to Northern Ireland schools).



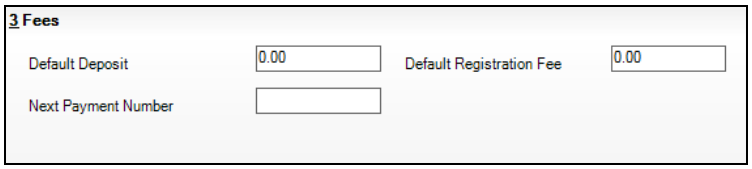
The **Default Days Until Followup** field is automatically set to 5 which indicates the number of days after which a follow up to a communication, such as a letter, should be made. If the **Followups By Default** check box is also selected, a message is displayed on the Home page indicating that a follow up is required after the default number of days has elapsed.

The final setting in the **Communications** panel provides the facility to define the default communication type that your school typically uses (if required). By default, the **Default Communication Type** drop-down list is empty and therefore, when a communication record is created, the **Type** drop-down list is blank. If a default is selected, e.g. **Email** then this is displayed in the **Type** drop-down list on the **Communication Details** page (**Focus | Communication**) as shown in the following graphic.



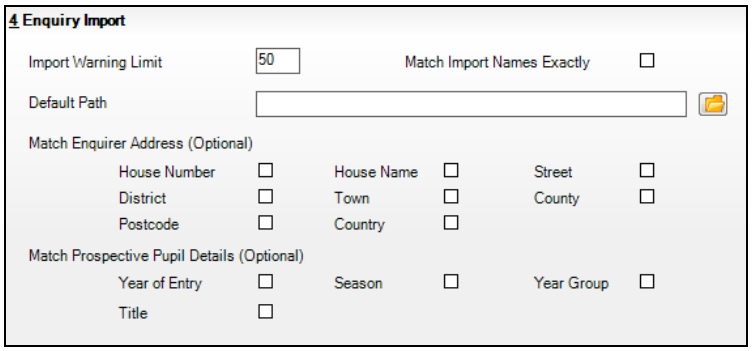
Configuring Fees

1. From the **Setup Details** page (via **Tools | Admission | Defaults**), click the **Fees** hyperlink.



2. In the **Fees** panel, enter a figure in the **Default Deposit** field. This figure represents the standard monetary value of any deposits that may be requested from parents to confirm their child's place at your school.
3. Enter a figure in the **Default Registration Fee** field. This figure represents the standard monetary value of a fee that may be collected on registration and is often non-refundable.
4. Enter a figure in the **Next Payment Number** field. This figure increments as receipts are allocated within the Fees module.

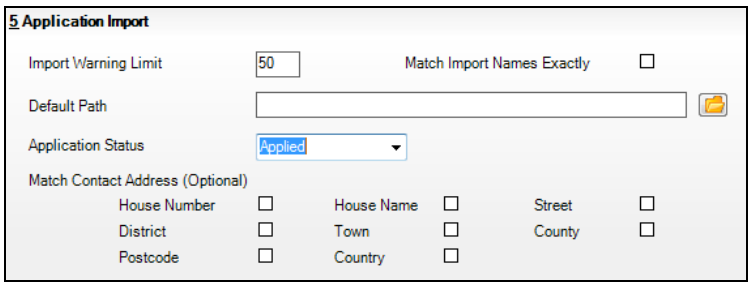
   Schools with an Independent licence can complete additional fields in the **Enquiry Import** and **Application Import** panels.



If you wish to use the enquiry import functionality, the **Enquiry Import** panel must be completed.

5. Enter a figure in the **Import Warning Limit** field to indicate the maximum number of records that can be imported into SIMS in a single file. It is envisaged that enquiry records will be imported into SIMS at regular intervals (e.g. every day), so the default is set to 50. Selecting a low number also minimises the system resources used to import the file.
6. Select the **Match Import Names Exactly** check box if, during the import process, you want to check for an enquiry that has already been recorded in SIMS based on an exact match on prospective pupil/student name.
7. The **Default Path** to XML import files can be specified if you intend to store all import files in the same location, reducing the need to navigate around a folder system. This path can be amended prior to an import. Enter the path name or click the **Search** button then select the required path.
8. SIMS will carry out a range of checks prior to importing the content of an XML file. These checks reduce the risk of importing an enquirer who may already exist in SIMS and importing a prospective pupil/student who is already recorded in SIMS. Select the appropriate **Match Enquirer Address (Optional)** and **Match Prospective Pupil Details (Optional)** check boxes, if required.
9. Click the **Save** button.

   If you wish to use the application import functionality, the **Application Import** panel must be completed.



10. Enter a figure in the **Import Warning Limit** field.
11. Select the **Match Import Names Exactly** check box if, during the import process, you want to check for an application that has already been recorded in SIMS based on an exact match on prospective pupil/student name.
12. Define the **Default Path** to XML import files if you intend to store all import files in the same location, which reduces the need to navigate around a folder system. Enter the path name or click the **Search** button then select the required path.
13. Select the **Application Status** from the drop-down list. The **Application Status** defaults to **Applied**.
14. Select the appropriate **Match Contact Address (Optional).** SIMS will carry out a range of checks prior to importing the content of an XML file. These checks reduce the risk of importing an application that may already exist in SIMS.
15. Click the **Save** button.

Saving the Defaults

Once all the defaults have been set, click the **Save** button on the toolbar to save the settings.

Creating Intake / Admission Groups

Intake and admission groups are used to maintain lists of the applicants who have registered an interest in being taught at your school. These lists are organised by the intake that the applicant is applying for, e.g. Reception, Year 7, etc. Schools will maintain different lists depending on how their applications are organised.

Secondary schools for example, may maintain one list for applicants to Year 7 and another list for applicants to the Sixth Form, or have separate lists based on the feeder schools the applicants are currently attending. Primary schools with a nursery intake may stagger the intake over a number of days and may wish to maintain separate lists for each group of applicants being admitted on a specific day.

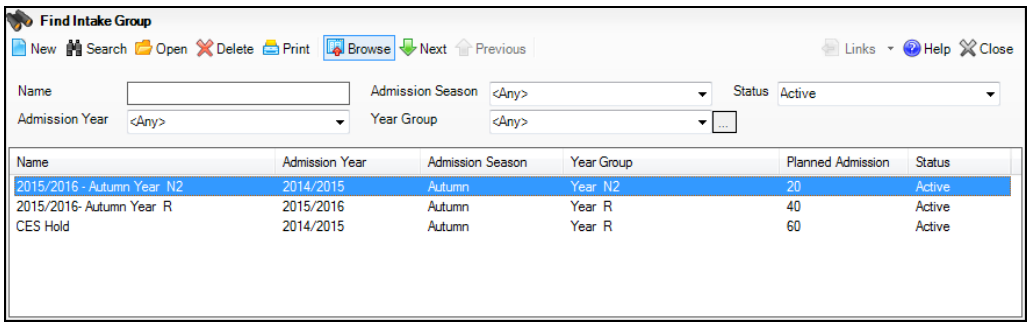
It is possible to create an intake group which contains one or more admission groups. For example, in a Primary school an intake group could be created for Nursery which contains separate admission groups for those joining in the Autumn, Spring and Summer terms. In a Secondary school, an intake group could be created for Year 7 with admission groups for either Feeder Schools or Registration Groups.

Intake and admission groups must be set up in order to manage the annual admissions process for the forthcoming academic year, and it is possible to set up groups for several future academic years if required. Once set up, applicants can be manually added to the applicable admission group or imported via CTF, ADT or ATF files. Once added, their application status can be changed to indicate the progress of their admission.

Independent schools and Own Admission Authority Maintained schools using selection criteria should set up an Admissions Policy before setting up intake and admission groups.

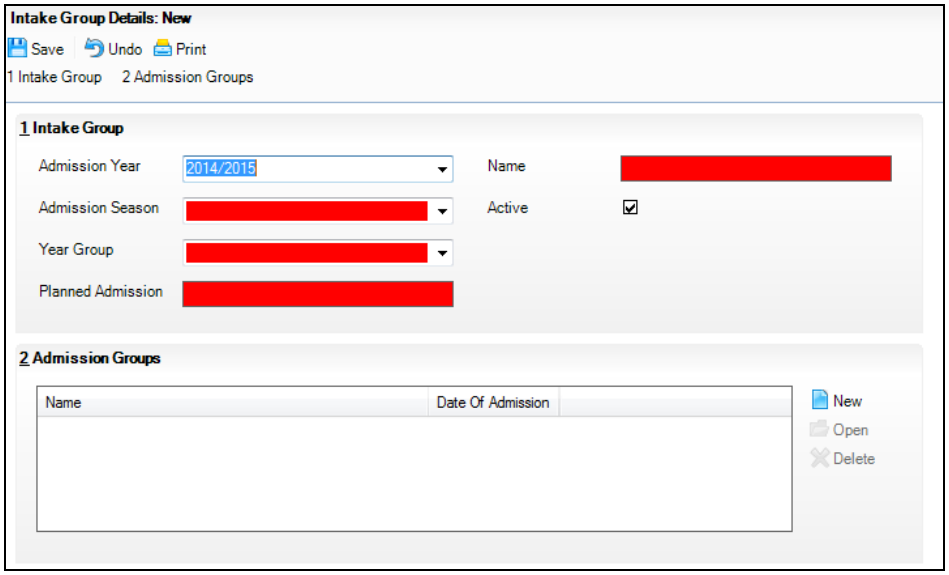
Creating an Intake Group

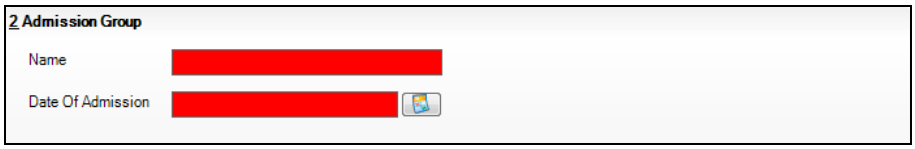
1. Select **Routines | Admission | Admission Groups | Setup** to display the **Find Intake Group** browser.



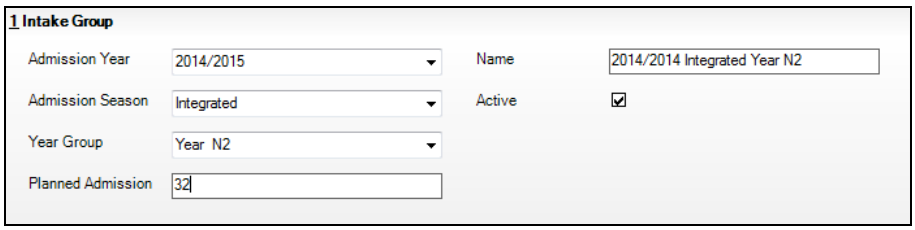
2. Carry out a search to ensure that the intake group does not already exist.

3. Click the **New** button to display the **Intake Group Details** page. Mandatory fields are highlighted in red. The page will look slightly different depending on whether you have set up admissions to use multiple admission groups.





4. In the **Intake Group** panel, select the **Admission Year** to which the intake group relates (e.g. 2014/2015) from the drop-down list (this defaults to the current academic year).
5. Select the required **Admission Season** (**Autumn Spring** or **Summer**) or, if the intake group does not apply to a specific season, select **Integrated** from the drop-down list.

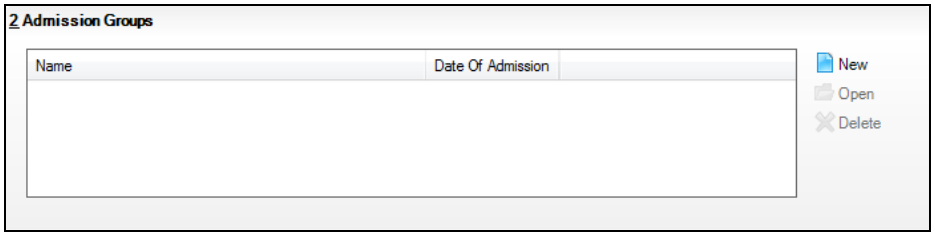


6. Select the required **Year Group** from the drop-down list (click the **Inactive** button if you wish to select a year group that is not currently active, e.g. a future year group such as a new sixth form).
7. Enter the number of applicants that you expect to admit to this intake group in the **Planned Admission** field.
8. If you have previously defined an admissions policy for this intake group, select it from the **Admission Policy** drop-down list (Independent and Own Admission Authority Maintained schools Basic/Full Licence only).

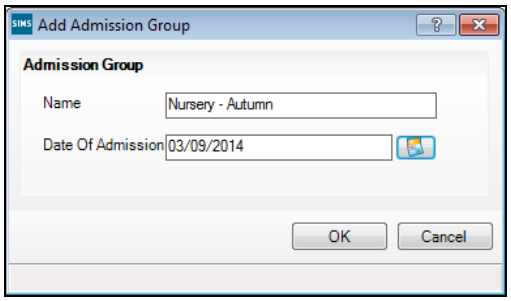
9. Enter the number of applications that should be ranked in the **Numbers to Rank** field (Independent and Own Admission Authority Maintained schools Basic/Full Licence only). By default, all applications within an intake are ranked. If you have agreed with your Local Authority that you will rank only a certain number of applications, enter that agreed number in this field.
10. If you press the **Tab** key through the **Name** field or click in the field, a default name is supplied for the intake group based on the **Admission Year, Admission Season** and **Year Group**, e.g. `2014/2015 – Integrated Year N2`. Edit the default name as required.
11. The **Active** check box is selected by default and indicates that the intake group is available for use. Deselect this check box only if you wish to create intake groups that will be used in the future (they will not be displayed in the **Find Intake Group** browser by default).

Adding Multiple Admission Groups

If you do not use multiple admission groups, please move onto the next section.



1. From the **Admission Groups** panel, click the **New** button to open the **Add Admission Group** dialog.

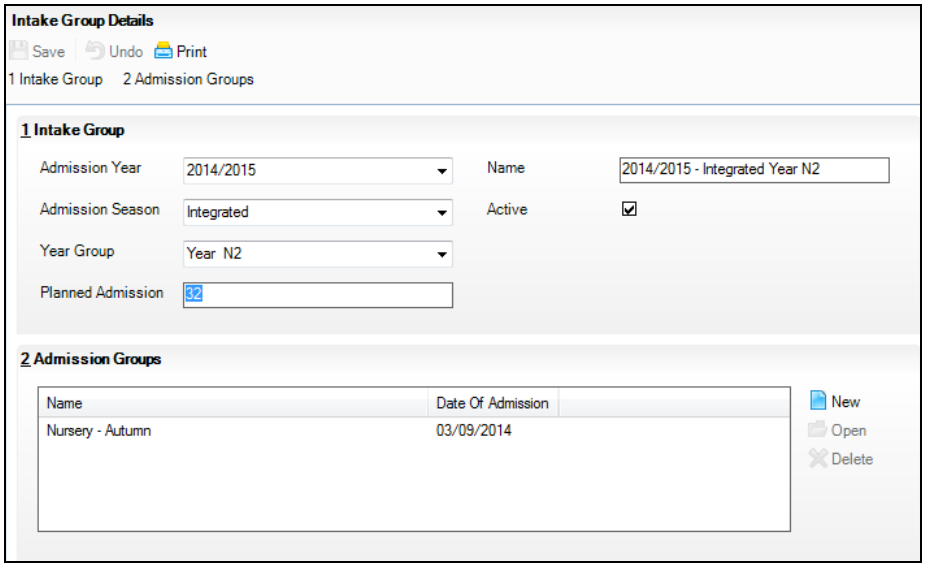


2. Enter a **Name** for the admission group together with the **Date of Admission** (click the **Calendar** button and select the required date if preferred).

> ***IMPORTANT NOTE:*** *Please ensure that the* ***Date of Admission*** *falls within the applicable academic year. We recommend that the date of admission is the day that the children will actually arrive in school, i.e. not a teacher training day. However, please check with your Local Authority for advice on the correct date to be used if you are unsure.*

3. Click the **OK** button to add the admission group.

4. If any further admission groups are required, click the **New** button and repeat the previous process.



5. Click the **Save** button on the toolbar to create the intake and admission groups.

Adding a Single Admission Group

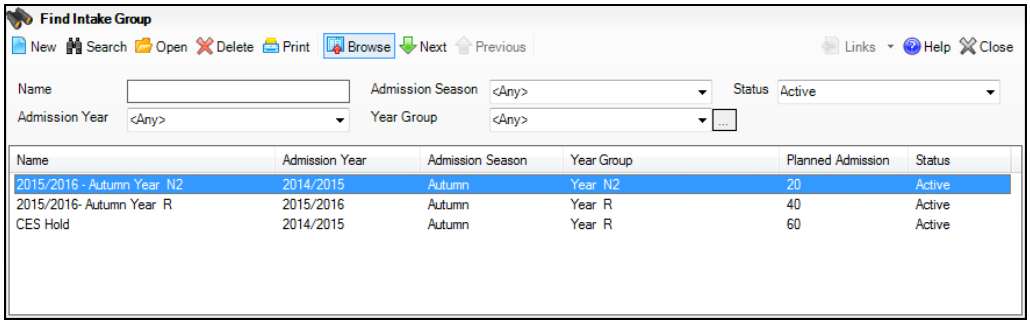
1. Clicking in the **Name** field adds a default name for the group which can be overtyped as required.

2. Enter the **Date of Admission** for the group.
3. Click the **Save** button on the toolbar to create the intake and admission group.

Making Intake/Admission Groups Inactive

Making intake groups inactive will ensure that by default, they are not available for selection from applicable browsers unless the user specifically elects to view inactive groups.

1. Select **Routines | Admission | Admission Groups | Setup** to display the **Find Intake Group** browser.



2. Search for and then double-click the required intake group to select it.
3. Deselect the **Active** check box then click the **Save** button to save the change. The intake group will no longer be displayed in the browser unless **Inactive** is selected from the **Status** drop-down list.

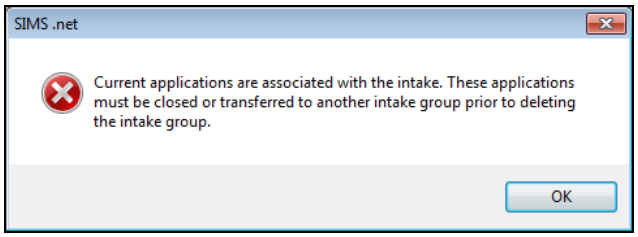
Deleting Intake/Admission Groups

Intake Groups can be deleted providing you have dealt with all the applications in that group (i.e. admitted or withdrawn them).

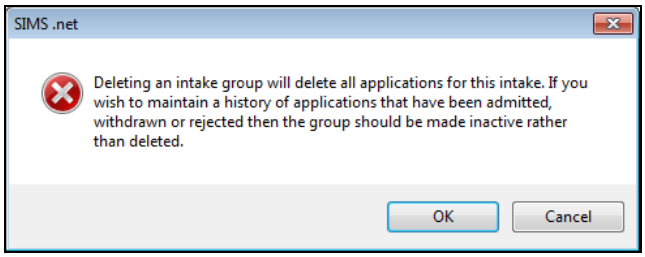
> ***IMPORTANT NOTE:*** *Deleting the intake group will delete all the admission groups and application records contained within it.*

It may therefore be preferable to mark the intake group as inactive (as described in the previous section) to remove it from the browser, rather than delete it completely.

The following message is displayed if you attempt to delete an intake group that still has active applications.



1. Select **Routines | Admission | Admission Groups | Setup** to display the **Find Intake Group** browser.
2. Search for and then highlight the required intake/admission group.
3. Click the **Delete** button. The following error message is displayed.



05 | Recording Communications and Follow Ups

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Introduction

It is possible to search for and record details of any communications that you receive from, or send to, the contact or parents of a prospective pupil or existing applicant. It is also possible to attach documents that you have received electronically or scanned into SIMS.

The type of communication could range from an initial enquiry regarding admission places, through to the application being accepted and subsequent correspondence during the applicant's time at the school.

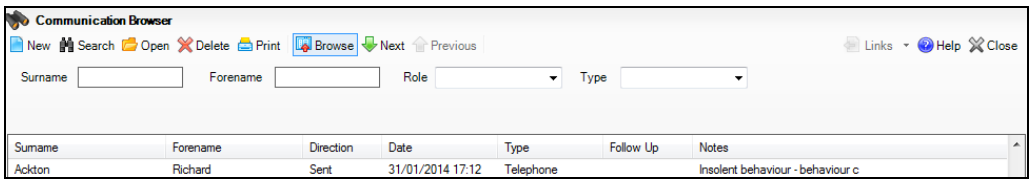
This facility also enables the recording of communications relating to fees, deposits and bills, for those schools using Fees.

Communication details can be accessed and entered in a number of ways. Accessing the **Communication** browser via **Focus | Communication** enables you to search for all communications to see which may have already been entered into SIMS. You can click on the relevant columns in the **Communication** browser to sort them and aid in your search. For example, clicking on the **Follow Up** column allows you to sort the communications in order of their need for a follow up contact. For schools using Fees 7, the search functionality enables the sorting of communications by **Priority** using this method. Communications can be added via **Focus | Communication**, which is beneficial in selecting multiple applicants (or prospective pupil/students) for communications made on behalf of several people.

You can also access the **Communication Details** page from within an applicant's or enquirer's details by clicking the **New** button adjacent to the **Communications** panel on the **Application Details** or **Enquiry Details** page. This is useful when searching for, or adding, a specific communication regarding an applicant (or prospective pupil/student).

Searching for a Communication

1. Select **Focus | Communication** to display the **Communication** browser.



2. Enter the **Forename** and **Surname** of the individual from whom the communication was sent or received. Alternatively, select their **Role** from the drop-down list e.g. **Enquirer** or select the **Type** of the communication.
3. Click the **Search** button to display all individuals who match the search criteria entered.

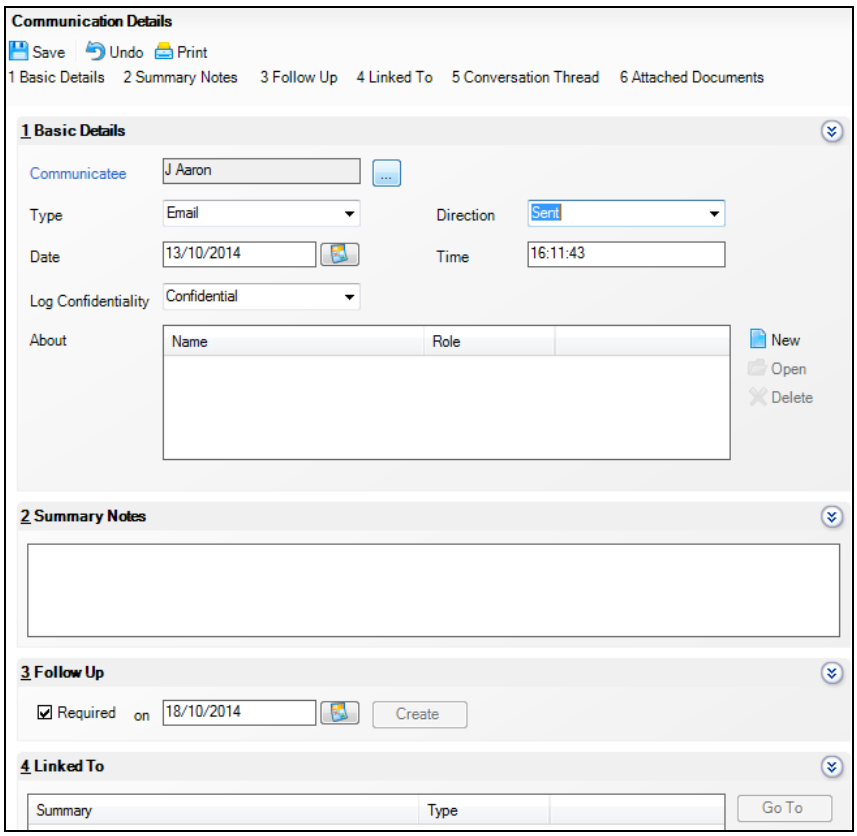
> *NOTE: You can click the column headings to sort the communications by various criteria. Clicking the same heading again reverses the sort order. For example, clicking the **Direction** heading enables you to sort the communications in order of those **Received** or **Sent** by the school.*

4. Highlight the required communication then click the **Open** button to display the **Communication Details** page.

Adding a Communication

Using the Communications facility, you can add new communications, follow-up any communications that have already been received and keep a complete history of all correspondence between the school and the applicant's contact/parents.

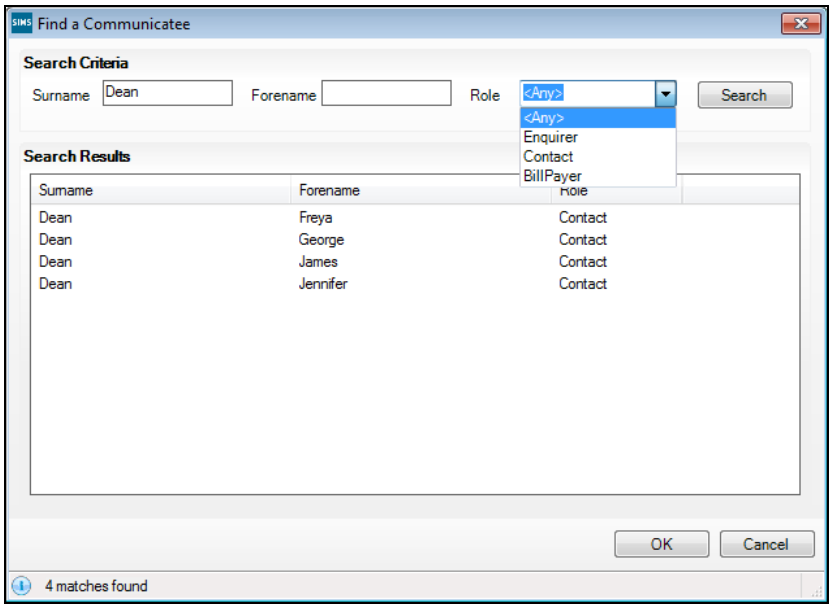
1. Select **Focus | Communication** to display the **Communication** browser.
2. After searching for an existing communication to ensure that it does not already exist, click the **New** button to display the **Communication Details** page.



To ease navigation and to enable only the details you wish to view to be displayed, click the **chevron** button at the top right-hand side of any of the panels on this page to show or hide its content.

Adding Basic Communication Details

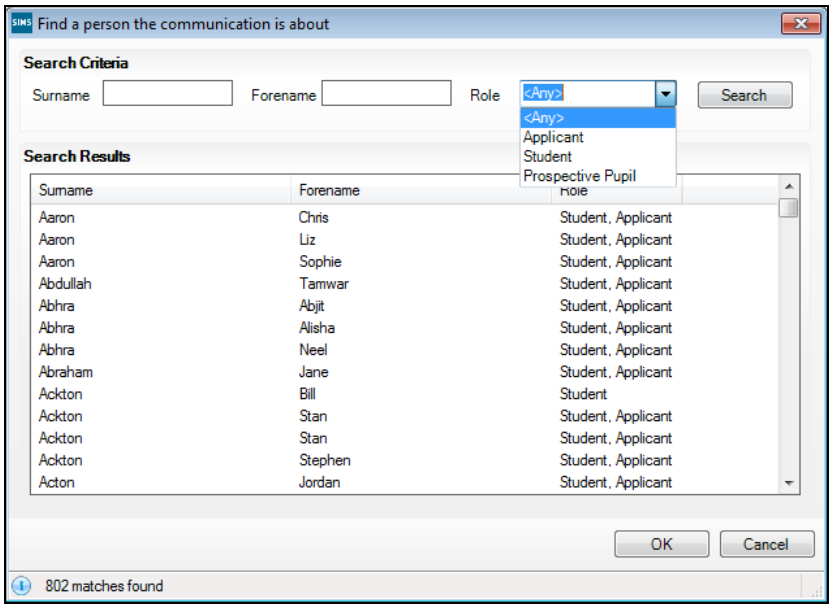
1. To select the person to whom the communication is concerned, click the **Browse** button adjacent to the **Communicatee** field in the **Basic Details** panel to display the **Find a Communicatee** dialog.



2. Enter the **Surname** and **Forename** of the communicatee or select their **Role** from the drop-down list. Alternatively, leave all the fields blank then click the **Search** button to display all communicatees recorded in SIMS.
3. Highlight the required communicatee then click the **OK** button to return to the **Communication Details** page, where the **Communicatee** field is populated in the **Basic Details** panel.
4. For users of Fees 7, the **Priority** field is provided. Select the **Priority** from the drop-down list. This provides a **Priority** field, which can be used to order the display of communications when searching.
5. Select the **Type** of communication from the drop-down list. Additional communication types can be added via **Tools | Lookups | Maintain**.
6. For users of Fees 7, an additional **Type** field is provided, which enables you to select a fees-related communication type e.g. **Fees Communication**.
7. Select the **Direction**, which indicates whether the communication was **Received** by the school or **Sent** from the school.

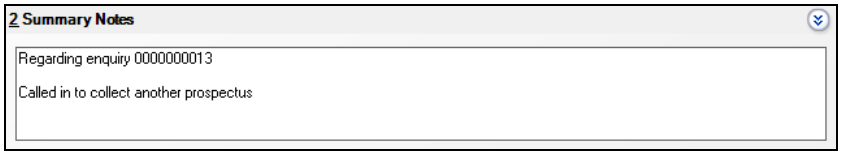
   The **Date** that the communication was received or sent defaults to today's date but it can be changed by clicking the **Calendar** button then selecting the required date. The **Time** field is also populated automatically.

8. Select the status of the communication from the **Log Confidentiality** drop-down list.
   - **Public** - the communication is available to those with view and view/edit permissions. Users with view and view/edit permissions to private and confidential as well as public communications can also change the status of the communication from public to private or confidential.
   - **Confidential** - the communication is available only to the school administrator, the senior leadership team and the SENCo for messages. These people have permission to view and view/edit a communication. Only the owner of a confidential communication and the school administrator have permissions to delete any confidential communication and to make any confidential communication public. This will be particularly important where originators of the communication have left the school.
   - **Private** - the communication is available to those who save the record. If required, only the owner of a private communication can make it public. The system manager can delete the private communication where, for example, the owner is no longer employed by the school.
9. Click the **New** button adjacent to the **About** field to display the **Find a person the communication is about** dialog.



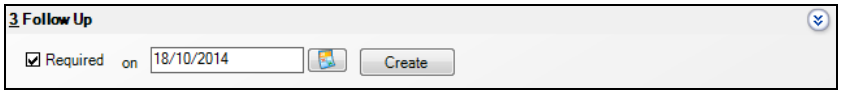
10. Enter the **Surname** and **Forename** of the person or select their **Role** from the drop-down list. Alternatively, leave all the fields blank then click the **Search** button to display all people recorded in SIMS.
11. Highlight the required person then click the **OK** button to return to the **Communication Details** page, where the **About** table is populated.
12. Enter any comments (up to a maximum of 500 characters) in the **Summary Notes** panel.

The **Summary Notes** panel is useful for viewing/adding concise details of the communications sent from, and received by, your school.

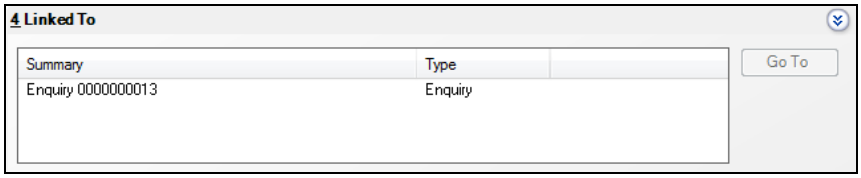


If the communication relates to an enquiry, the **Summary Notes** field displays the enquiry reference number allocated by SIMS.

13. If a **Follow Up** is actioned by the school, select the **Required** check box then enter the date on which the follow up should be carried out. If you click the **Create** button before clicking the **Save** button, a thread is created with a date and time stamp in the **Conversation Thread** panel.



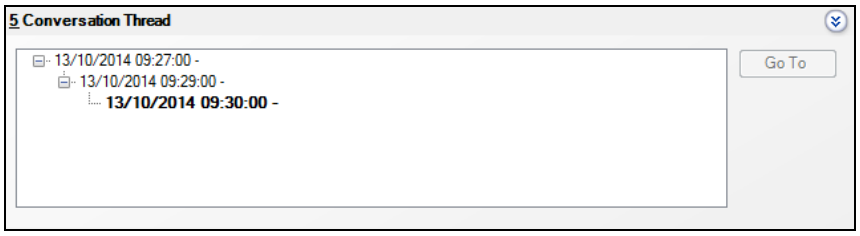
14. If the communication is connected to an enquiry, an application or a fees payment, the nature of the link is displayed in the **Linked To** panel. Click the **Go To** button to view the details of the link.



15. Click the **Save** button.

Viewing the Conversation Thread

The **Conversation Thread** panel enables you to view the full details of all communication traffic involved in the current communication.



The panel displays information on the date and time at which each communication entry has been saved, together with the details entered in the **Summary** panel.

Click to highlight an entry, and click the **Go To** button to display the full details of this communication entry in the **Communication** page.

Attaching Documents

Documents can be attached to the communication record (please see *Adding Note/Document* on page *48*).

Deleting a Communication

> ***WARNING:*** *Careful consideration should be given before deleting a communication because once it has been deleted it cannot be recovered.*

1. Select **Focus | Communication** to display the **Communication Details** browser or click the **Communications** hyperlink on the **Enquiry Details** or **Application Details** page.
2. Search for the required communication, highlight it then click the **Delete** button.

06 | Defining the Pastoral Structure

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Introduction

A new academic year's pastoral structure is automatically set up when the new academic year is created and is based on the current academic year's structure. Therefore, you must have created a new academic year before proceeding with the instructions in this section (please see *Creating an Academic Year* on page *57*).

There may be occasions when the new academic year's pastoral structure needs to be different from the current structure. For example, you may wish to:

- add additional classes where numbers have increased.
- merge registration groups where numbers have decreased.
- add a new year, such as the introduction of a Nursery to your school.
- change the names of your classes.

NOTES: It is not essential to assign teachers to classes at this stage. This can be done when the information is known, but must be done before the start of the academic year in order not to affect Attendance records.

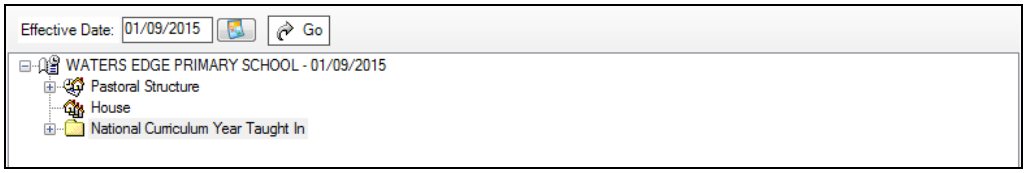
If you want teachers to move up with their pupils in the next academic year, this can be achieved as part of the pastoral promotion process.

If an additional year group is required, such as the introduction of a Nursery, this should be added before admission groups are created to ensure that the new year group is available for selection.

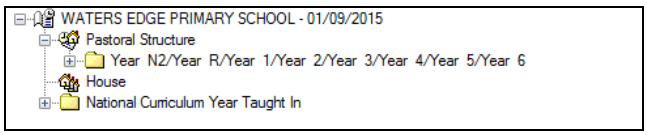
Opening the New Academic Year's Structure

1. Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

***IMPORTANT NOTE:** Please ensure that the next academic year is displayed in the **Effective Date** field to ensure that changes are being made for the next, rather than the current academic year.*



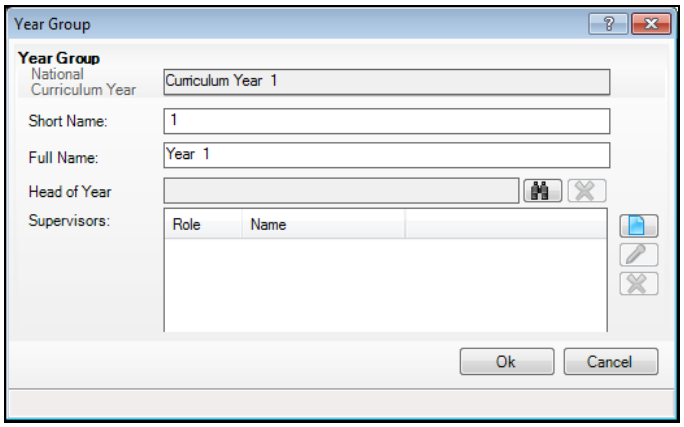
2. The **Effective Date** defaults to the start date of the next academic year. Whilst it is possible to change this date to view information, the default date must be used in order to edit information.



3. The full structure can be viewed by clicking the **+** or **-** icons to expand/contract various areas.

Checking National Curriculum Years

Please ensure that the National Curriculum year attached to each year group is correct. This can be achieved by right-clicking on each year group and selecting **Properties** from the pop-up menu. The National Curriculum year attached to the year group is displayed in the top field.



Adding / Editing a School Tier

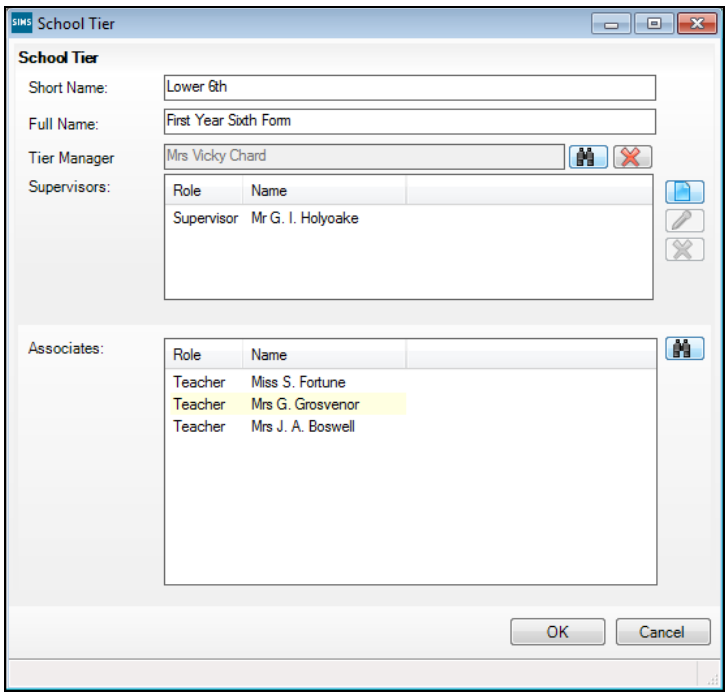
It is possible to organise a school into Tiers, such as Lower, Middle and Upper, or for independent schools, Pre-preparatory and Preparatory. Tiers are likely to have been created when SIMS was set up for first time use, but they can be subsequently added or edited, if required.

Some schools may cover the full age range from 3-18 and may therefore wish to organise themselves into tiers so that pupil/students move from one tier to the next as they reach the appropriate age. If one tier is defined for a range of year groups, all the remaining year groups must also be organised into tiers, it is not possible to have a mixture.

A teacher or a member of non-teaching staff can be linked to one or more school tiers via the Pastoral Structure. Once linked, they become known as an associate of a tier and this enables members of staff associated with a particular tier to be retrieved in person browsers throughout SIMS.

1. Select the required pastoral structure.

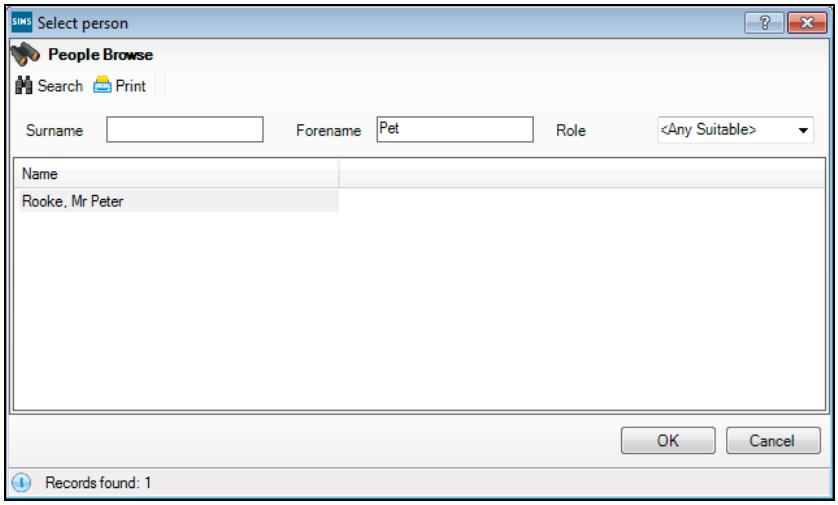
2. Right-click the **Pastoral Structure** icon and select **New School Tier** from the pop-up menu to display the **School Tier** dialog.



3. Enter a **Short Name** and **Full Name** for the new School Tier.

   The **Full Name** (up to 32 characters) is used throughout SIMS to identify the School Tier, the **Short Name** (up to 10 characters) is used in columnar reports when using the Reporting tool in SIMS. Both names must be unique within the school.

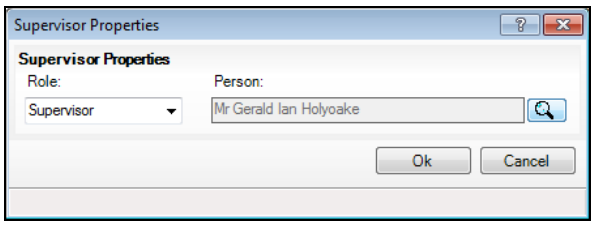
4. Select the manager for the tier by clicking the **Browser** button adjacent to the **Tier Manager** field to display the **Select person** browser.



5. Search for, then highlight the required person from the list and click the **OK** button to choose them.

   Only members of staff who have been defined as teachers within your SIMS system are available for selection.

6. Select a supervisor for the tier if required, by clicking the **New** button adjacent to the **Supervisors** panel to display the **Supervisor Properties** dialog. Alternatively, edit an existing supervisor by highlighting their name and clicking the **Edit** button.



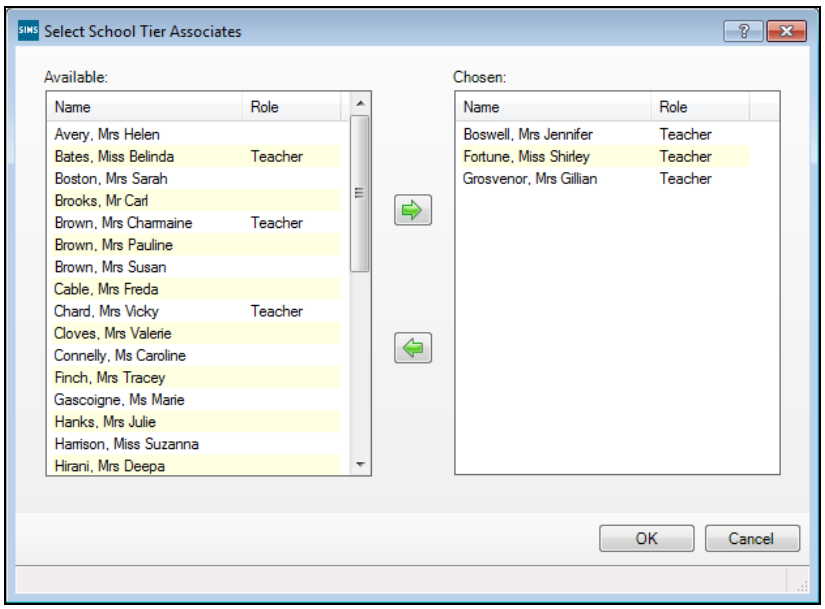
New button

Edit button

7. In the **Supervisor Properties** dialog, select the **Role** from the drop-down list then click the **Browser** button adjacent to the **Person** field to display the **Select person** browser.

> *NOTE: By default, the **Role** drop-down list displays **Supervisor**.*

8. Choose the person in the same way as for the Tier Manager then click the **OK** button on the **Supervisor Properties** dialog to set the person as the supervisor for the tier.
9. Select the teacher(s) or member(s) of non-teaching staff you wish to record as associates of the selected tier by clicking the **Search** button in the **Associates** panel to display the **Select School Tier Associates** chooser.



10. Highlight the required person (or people) then click the **Select** button to move them from the **Available** panel to the **Chosen** panel. Anybody selected in error can be removed from the **Chosen** panel by highlighting their name and clicking the **Remove** button.

11. Click the **OK** button to return to the **School Tier** dialog.
12. Click the **OK** button to save the tier details.

> *NOTE: Creating a school tier can take some time for the system to complete.*

Deleting School Tiers

Tiers can be removed from the school structure if they are no longer required. The year groups that have been organised in **Tiers** and that contain a **Registration Group** can be removed from the tier structure once their **Registration Group** has been removed.

1. Select the required pastoral structure.
2. Right-click the **Tier** to be deleted and select **Remove** from the pop-up menu.

> *NOTE: If you delete a **Tier** that includes a **Registration Group**, then another warning message states that the **Selected Year Group contains Registration Group and cannot be deleted**. If you want to delete that tier, remove its **Registration Group** then right-click the **Tier** and select **Remove** from the pop-up menu (please see* Deleting Registration Groups/Classes *on page* 98*).*

A warning message is displayed asking you to confirm that the action you are about to undertake is correct.

3. Click the **Yes** button if you are sure that the selected **Tier** is no longer required.

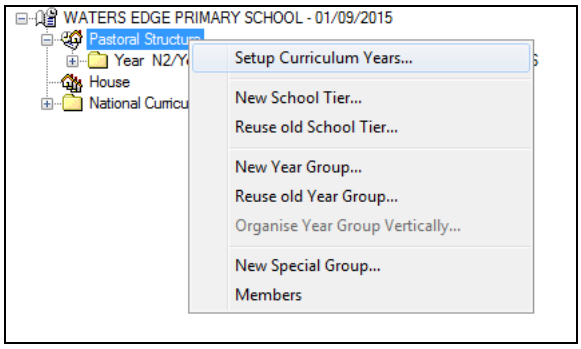
Adding New Year Groups

If an additional year group is required, such as the introduction of a Nursery, this should be added before admission groups are created to ensure that the new year group is available for selection.

> *NOTE: Schools who have a nursery and admit pupils into the nursery later on in the academic year, e.g. in January, may benefit from creating either an N1 or N2 year at this point. This will enable pupils to be assigned to the appropriate National Curriculum Year when they join the school. This will ensure the accuracy of a School Census return.*

1. Select next year's pastoral structure.

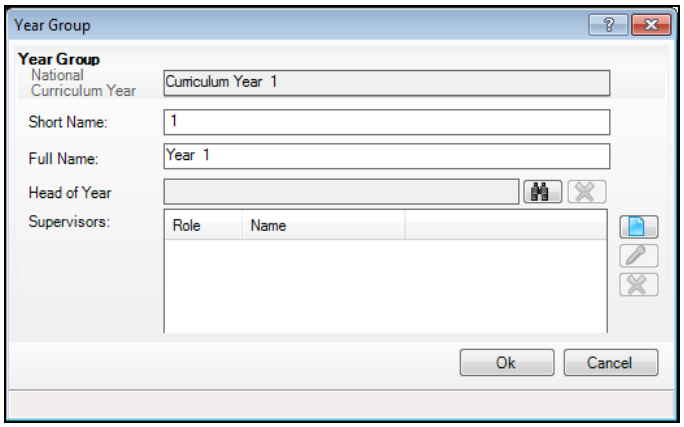
> *NOTE: If you are adding a year group because you are extending your range of years, you will also need to set up a National Curriculum year. This is achieved by right-clicking on **Pastoral Structure**, selecting **Setup Curriculum Years** then selecting the required curriculum year check box.*



Errors are displayed at the bottom of the screen until year and classes have been added (as shown in the following graphic):

> *NOTE: Once a National Curriculum year has been created, it cannot be deleted. Therefore, please ensure that if required, the correct NC year is added.*

2. Right-click on **Pastoral Structure** and select **New Year Group** from the pop-up menu to display the **Year Group** dialog.



3. Select the **National Curriculum Year** from the drop-down list to which the year group will be attached.
4. Enter a **Short Name** and a **Full Name** for the year group.

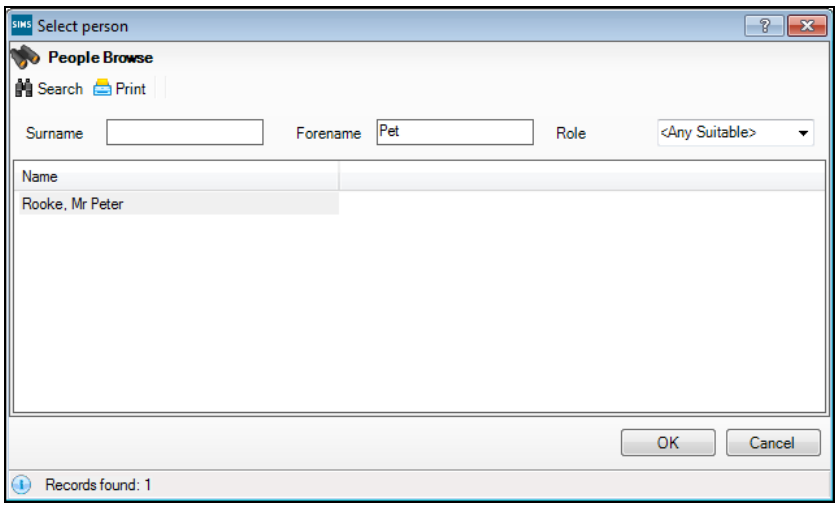
The **Full Name** (up to 32 characters) is used throughout SIMS to identify the year group (e.g. **Year 1**). The **Short Name** (up to 10 characters) is used for column headings in reports (e.g. **1**). As a consequence, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of 6 characters. Both names must be unique within the school.

5. Select the **Head of Year** if required, by clicking the **Browser** button to display the **Select person** browser. This is optional (as many Primary schools do not have Heads of Year) and/or can be done at a later date if preferred. If you do not intend to add a Head of Year, please go to step 8.

Browser button

6. Enter a **Surname** and/or **Forename** then click the **Search** button. Alternatively, leave the fields blank to search for all staff.

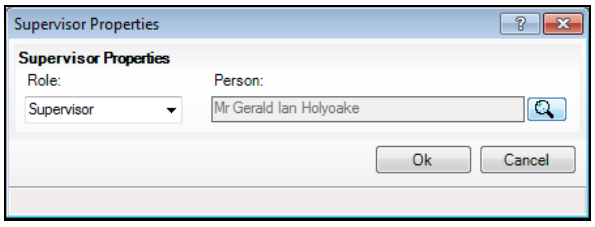
> *NOTE: Only members of staff who have been defined as teachers within your SIMS system are available for selection (i.e. the **Teaching Staff** check box on the **Employee Details** page is selected).*



Highlight the required person and click the **OK** button to select them as the Head of Year and return to the **Year Group** dialog.

7. Select a Supervisor for the year group (if required) by clicking the **New** button adjacent to the **Supervisors** panel to display the **Supervisor Properties** dialog. This is optional and/or can be done at a later date if preferred. If you do not intend to add a Supervisor, please go to step 8.

New button



- Select the **Role** from the drop-down list then click the **Browser** button adjacent to the **Person** field to display the **Select person** browser.

  *NOTE: By default, the **Role** drop-down list displays **Supervisor** and **Pastoral Manager**.*

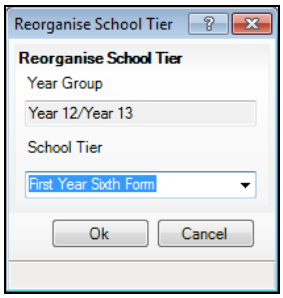
- Search for, and select, the required Supervisor in the same way as the Head of Year. Click the **OK** button on the **Supervisor Properties** dialog to set the selected person as the Supervisor and return to the **Year Group** dialog.

8. Click the **OK** button on the **Year Group** dialog to add the year group. You will next need to add applicable classes as described in the next section.

Associating Classes with Year Groups

If you have previously defined school tiers, you may wish to move an existing year group to the tier.

1. In the Pastoral Structure, right-click the required year group name and select **Associate with New School Tier** from the pop-up menu to display the **Reorganise School Tier** dialog.



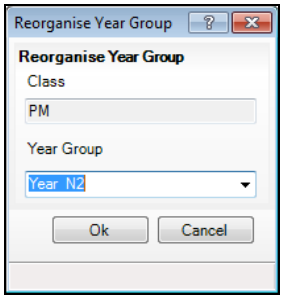
2. Select the **School Tier** from the drop-down list.
3. Click the **OK** button to transfer the Year Group.

The selected year group can now be accessed by clicking on the icon in the new tier in the **Pastoral Structure** tree and can be treated like any other year group in SIMS. Repeat for any other year groups to be transferred.

Re-organising Year Groups

If you have previously assigned a class in the registration group of a year group, you may wish to move this existing class to the registration group of another year group.

1. In the **Registration Group** of a **Year Group**, right-click the required **Class** (e.g. **PM**), and select the **Associate with New Year Group** from the pop-up menu to display the **Reorganise Year Group** dialog.



2. Select the **Year Group** from the drop-down list.
3. Click the **OK** button to transfer the Class.

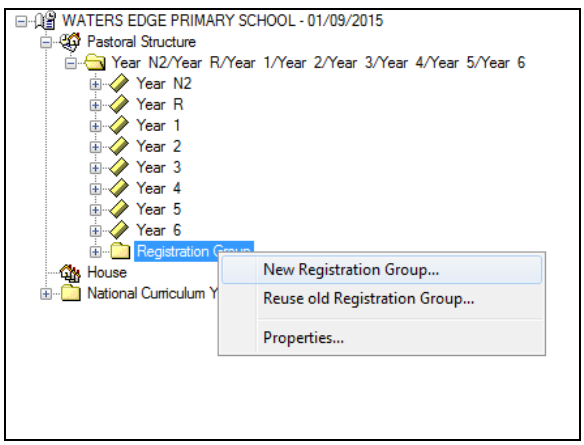
   The required class can now be seen in the **Registration Group** of the selected **Year Group**.

Adding Classes (Registration Groups)

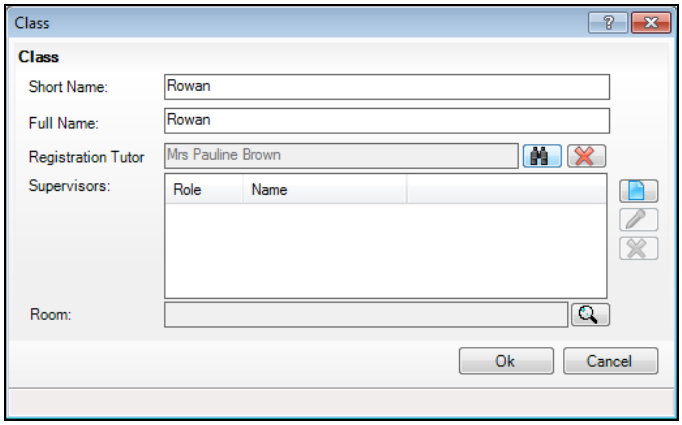
It is strongly recommended that you check to see if the name you intend to use for a new class has not previously been used. This is achieved by right-clicking on the required **Registration Group** folder in the pastoral structure and selecting **Reuse Old Registration Groups**. A dialog will open listing any classes that have previously been deleted.

If the required name is listed, highlight the name and click the **OK** button to re-use the class rather than creating a new class with the same name. If the required name is not listed, create a new class as follows:

1. Select next year's pastoral structure as described in *Opening the New Academic Year's Structure*.
2. Expand the year group to which the class will be added by clicking the adjacent **+** icon.



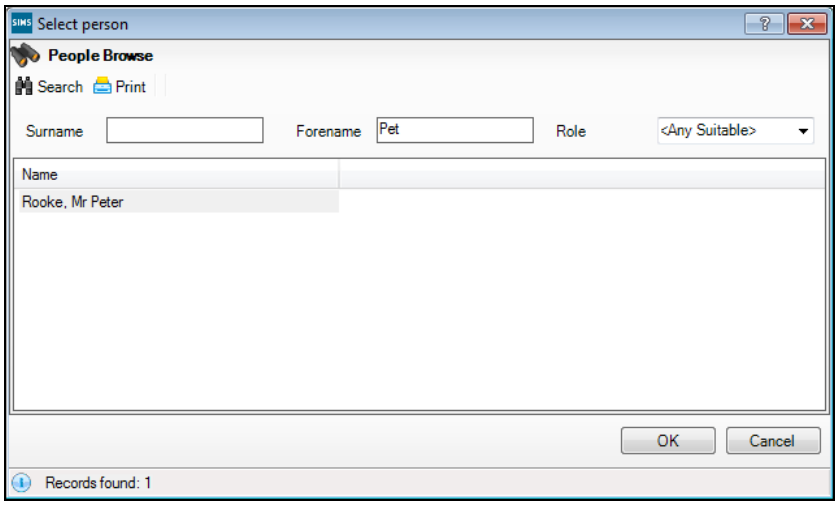
3. Right-click on the **Registration Group** folder and select **New Registration Group** from the pop-up menu to display the **Class** dialog.



4. Enter a **Short Name** and **Full Name** for the new class.

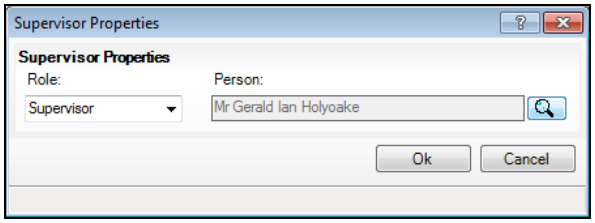
   The **Full Name** (up to 32 characters) is used throughout SIMS to identify the class, e.g. **Rowan**. The **Short Name** (up to 10 characters) is used for column headings in reports. As a consequence, to ensure column headings fit comfortably on the report page, it is recommended that short names should be as short as possible, e.g. a maximum of 6 characters. Both names must be unique within the school.

5. Add the **Registration Tutor** by clicking the **Browser** button to display the **Select person** browser.



6. Enter a **Surname** and/or **Forename** then click on the **Search** button. Alternatively, leave the fields blank to search for all staff.
7. Highlight the required person and click the **OK** button to select them as the Registration Tutor and return to the **Class** dialog.
8. Select a Supervisor for the class (if required) by clicking the **New** button adjacent to the **Supervisors** panel to display the **Supervisor Properties** dialog. This is optional and/or can be done at a later date if preferred. If you do not wish to add a Supervisor, please go to step 9.

New button

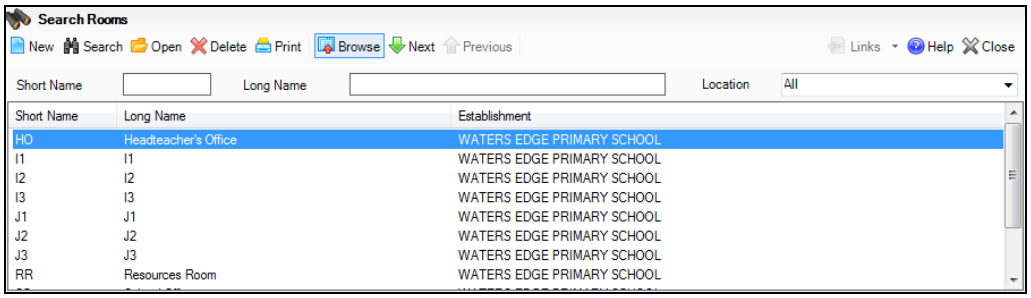


- Select the **Role** from the drop-down list then click the **Browser** button adjacent to the **Person** field to display the **Select person** browser. Select the required person in the same way as for the Registration Tutor.

> *NOTE: By default, the **Role** drop-down list displays **Supervisor**, **Pastoral Manager** or **Joint Main Supervisor**.*

- Click the **OK** button on the **Supervisor Properties** dialog to select the person as the Supervisor for the class return to the **Class** dialog.

9. Select the **Room** that will be used by this class (if required) by clicking the **Browser** button to display the **Room** browser.



- Enter either the **Short Name** or the **Long Name** of the room then click the **Search** button. Alternatively, leave both fields blank to search for all rooms.
- Highlight the required room from the list displayed and click the **OK** button to return to the **Class** dialog.

10. Click the **OK** button on the **Class** dialog to create the class.

Important Note on Editing Class Names

There may be occasions when you wish to rename classes either in the current, or in next year's pastoral structure. This is sometimes required by schools who name their classes based on teacher's initials and the teacher then leaves the school.

It is essential that you do not simply rename the class. This is because the class name is recorded in the class history. If you change the name, the change is made throughout the history of that class and a class is recorded as always having been in the changed name class.

*NOTE: To ensure that you don't rename a class to a name that has already existed, right-click on the required **Registration Group** folder in the pastoral structure and select **Reuse Old Registration Groups**. A dialog will open listing any classes that have previously been deleted. If the required name is listed, highlight the name and click the **OK** button to re-use it rather than creating a new class with the same name. If the required name is not listed, create a new class.*

Please see the following two examples:

Example 1:

A class is currently called 4AB after a teacher named Anita Brown. At the end of current academic year, Anita will move up with her class which will become 5AB.

If you rename 4AB to 5AB then all the pupils in 4AB are recorded as always having been in 5AB because the history is also amended.

In this circumstance, all you need to do is to create a new class, called 5AB in the pastoral structure for the new academic year (e.g. 2015/2016) and set the promotion mapping to promote to this class at the start of the new academic year. All pupils in 4AB will move up to 5AB at the start of the new academic year.

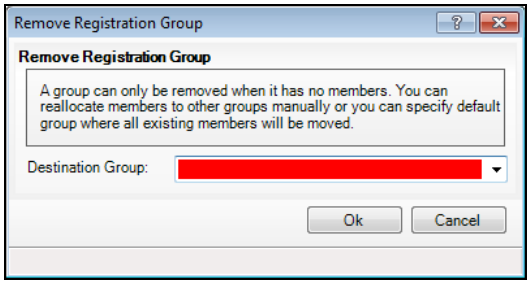
Example 2:

A class is currently called 4SL after a teacher named Sonia Lovell. Sonia is leaving and is replaced by Andrew White during the same academic year.

If you rename 4SL to 4AW then all the classes in 4SL are recorded as always having been in 4AW because the history is also amended.

To correctly change a class name, you must:

1. Add a new class in the current pastoral structure (e.g. 2014/2015) labelled with the new class name (e.g. 4AW).
2. Delete the old class by right-clicking on the required class name and selecting **Remove** from the pop-up menu to display the **Remove Registration Group** dialog.



3. Select the newly created class (e.g. 4AW) from the **Destination Group** drop-down list. All members from the old class are automatically transferred to the new class.
4. Click the **OK** button to delete the group and transfer the pupil memberships.
5. Click the **Save** button on the toolbar to save the changes.

General Advice

The naming of classes is entirely up to each school. However, you should note that if you use teachers' initials, there will be the requirement to carry out the previous instructions each time a teacher leaves or if there are any teaching changes that result in a class name change, e.g. teachers change class or years mid-year. In addition, you will need to create new classes based on the teacher's initials for each new academic year as described in **Example 1**. If you wish to use teacher's initials, then it is far easier if you do not precede the class name with the year, e.g. use SL rather than 4SL.

Primary schools may wish to use class names such as trees, colours, animals, etc. An alternative is to name classes by year and a single initial (not based on a teacher's name) such as 3A, 3B, etc. that will remain static year on year.

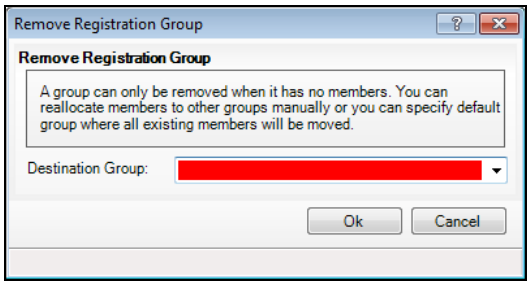
Deleting Registration Groups/Classes

Before removing a registration group/class in the current academic year, you will need to remove the pupil/students currently contained within it. You can only delete an empty registration group/class.

The pupil/students can either be collectively re-assigned to another registration group/class at the time the group/class is removed or you can use **Allocation** routines (accessed by right-clicking the required registration group/class and selecting **Members** from the pop-up menu) to divide the pupil/students into several other groups/classes.

Registration groups/classes can be easily removed from the next academic year as they do not yet contain any pupil/students.

1. Select the required pastoral structure.
2. Right-click the **Registration Group/Class** that you wish to delete and select Remove from the pop-up menu to display the **Remove Registration Group/Class** dialog.



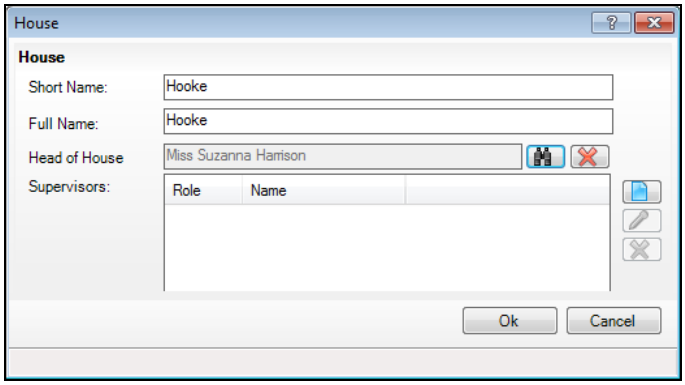
3. If you have not already reallocated pupil/students, select the required group from the **Destination Group** drop-down list.
4. Click the **OK** button to reallocate pupil/students and remove the selected registration group/class.

Adding / Editing a New School House

Houses can be created to enable pupils/students to be grouped for the duration of their time at the school. They can be placed into school houses whilst still at applicant status and from a selected date that falls within the current academic year. It is entirely optional whether houses are defined in your pastoral structure.

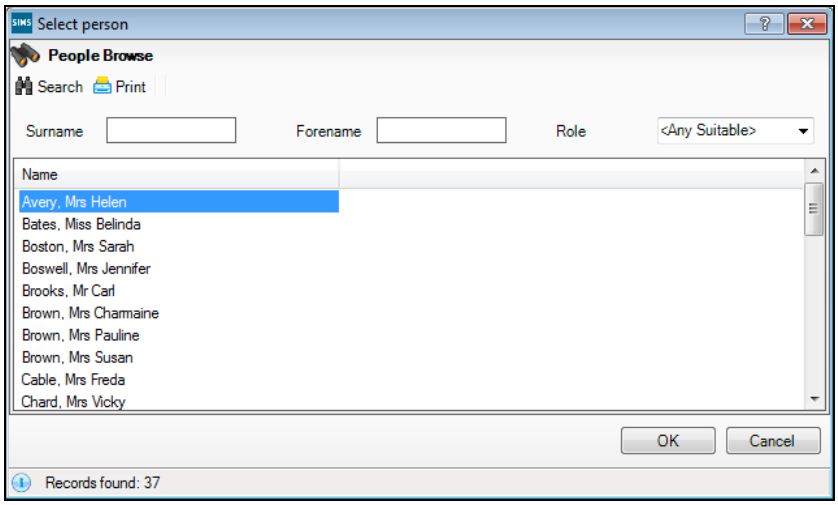
> ***IMPORTANT NOTE:*** *You should only edit the pastoral structure just before creating a new academic year, i.e. to make sure the existing pastoral structure meets your requirements before creating another academic year.*

1. Select the required pastoral structure.
2. Right-click the **House** icon and select **New House** from the pop-up menu to display the **House** dialog.

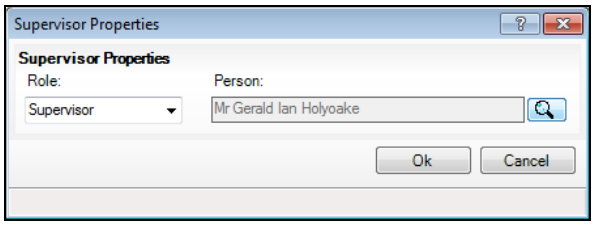


3. Enter a **Short Name** and a **Full Name** for the new house.

   The **Full Name** (up to 32 characters) is used throughout SIMS to identify the House, the **Short Name** (up to 10 characters) is used in columnar reports when using the Reporting tool in SIMS. Both names must be unique within the school.
4. Select the Head of the House by clicking the **Browser** button adjacent to the **Head of House** field to display the **Select person** browser.



5. Enter a **Surname** and/or **Forename** in the relevant fields and click the **Search** button. Alternatively, leave both fields blank to search for all staff.
6. Highlight the required person from the list displayed and click the **OK** button to set them as Head of House.
7. To add a new Supervisor, click the **New** button adjacent to the **Supervisors** panel to display the **Supervisor Properties** dialog. Click the **Edit** button to edit an existing supervisor.



New button

Edit button

8. Select the **Role** from the drop-down list then click the **Browser** button adjacent to the **Person** field to display the **Select person** browser. Select the required person in the same way as for Head of House.

> *NOTE: By default, the **Role** drop-down list displays **Supervisor** and **Pastoral Manager**.*

9. Click the **OK** button on the **Supervisor Properties** dialog to select the person as the supervisor for the house.
10. Click the **OK** button on the **House** dialog to save the details.

Deleting School Houses

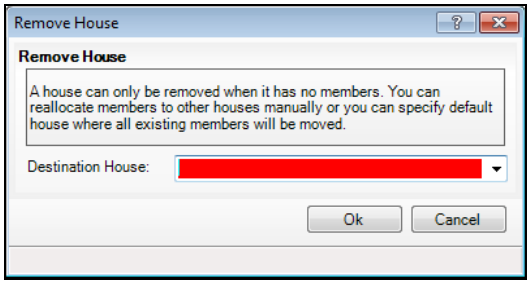
Before removing a house in the current academic year, you will need to remove the pupil/students that are currently assigned to it. Only empty houses can be deleted.

The pupil/students can either be collectively re-assigned to another house at the time the group/class is removed or you can use the **Allocation** routines (accessed by right-clicking the required group and selecting **Members** from the pop-up menu) to divide the pupil/students into several other houses.

Houses can be removed easily from the next academic year as they will not yet contain any pupil/students.

1. Select the required pastoral structure.
2. Right-click the required **House** and select **Remove** from the pop-up menu to display the **Remove House** dialog.

A warning message is displayed to ensure that the house you are about to delete no longer contains any pupil/students.



3. If you have not already re-allocated pupils/students to another house, select the required house from the **Destination Group** drop-down list.
4. Click the **OK** button to save the details.

Changing Year Group Horizontal / Vertical Structures

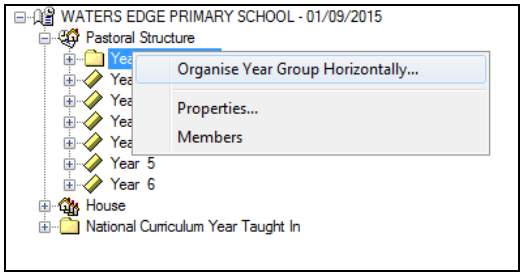
There may be occasions where you want the pastoral structure for the new academic year, to be different from the current year. For example:

- As a consequence of falling pupil/student numbers. This may require changing from a horizontal to a vertical structure to enable children from mixed year groups to be taught in the same class.
- As a consequence of increasing pupil/student numbers. This may require changing from a vertical to a horizontal structure to enable children from the same year to be taught in the same class.
- As a consequence of a change in pupil/student numbers across the years, e.g. low birth rate one year, then a high birth rate two years later. This may require changing to a combined horizontal and vertical structure.

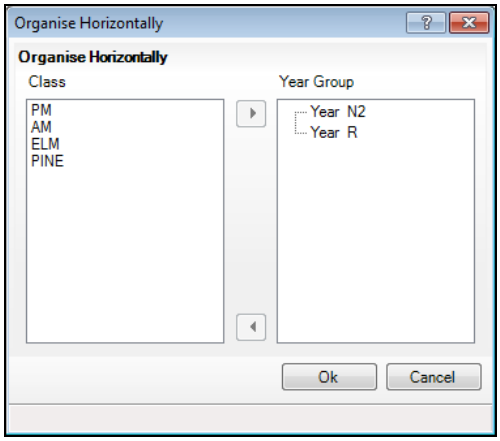
Changing from a Vertical to a Horizontal Structure

This process may be required if for example, your pupil numbers have increased. This could allow previously merged years, such as Nursery/Reception (vertically structured) to be split into two separate years (horizontally structured) because there are now sufficient pupils from the same year group to be taught in one class.

1. Select next year's pastoral structure.
2. Expand the **Pastoral Structure** heading by clicking the + icon. Vertically organised year groups can be identified by their names, separated by a forward slash, e.g. **Nursery / Reception**.

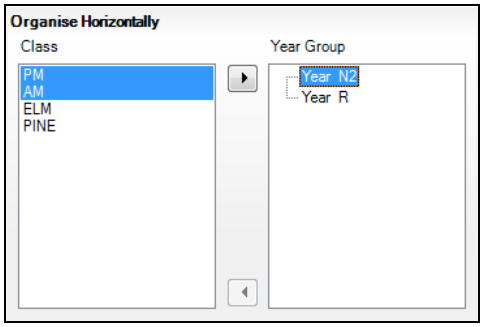


3. Right-click on the vertically organised year group and select **Organise Year Group Horizontally** from the pop-up menu to display the **Organise Horizontally** chooser.



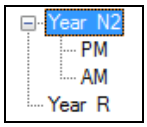
This chooser enables you to determine the classes you wish to attach to each year.

4. Highlight the classes to be attached to a year in the **Class** pane (hold down the **Ctrl** key to highlight more than one class then click the required year group in the **Year Group** pane).

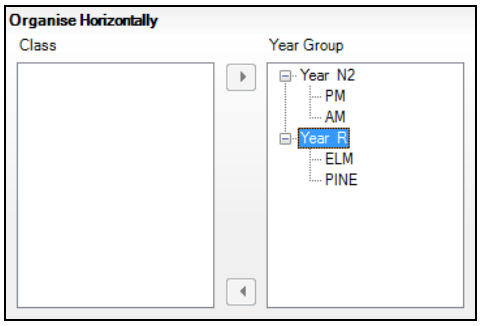


In the previous example, **PM** and **AM** are being attached to **Nursery**.

5. Click the right arrow button (i.e. **Add selected group to the selected year** button) in the centre of the dialog to attach the class to **Nursery**. The class is moved under the **Nursery** heading as shown in the following example.



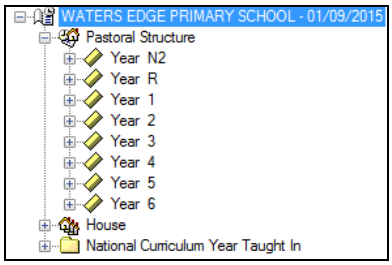
6. Repeat for all the remaining classes in the **Class** pane.



> *NOTE: Each class must be attached to a year group and the class pane must therefore be empty before you can complete the process.*

7. Click the **OK** button to save the details.

   The pastoral structure should now show the two previously merged years, as separate years as shown in the following example.

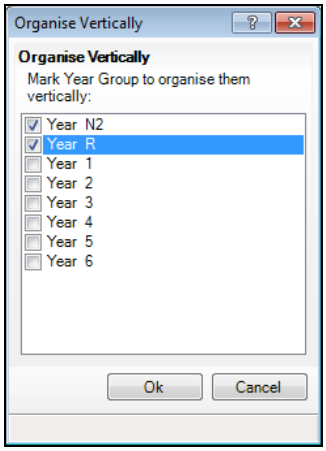


Changing from a Horizontal to a Vertical Structure

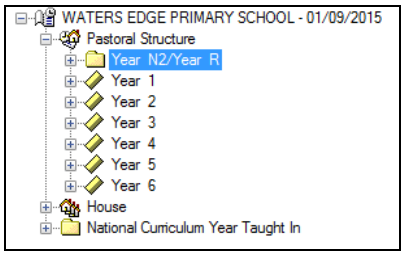
This process may be required if for example, your pupil numbers have decreased. This could allow previously separate years, such as Nursery and Reception (horizontally structured) to be merged into a single year (vertically structured) because there are insufficient pupils from the same year group to be taught in one class.

1. Select next year's pastoral structure.

2. Right-click on **Pastoral Structure** and select **Organise Year Group Vertically** from the pop-up menu to display the **Organise Vertically** dialog.



3. Select the check boxes adjacent to the year groups you wish to merge into a vertical structure then click the **OK** button. In the previous example, **Nursery** and **Reception** are being merged into a vertical structure.
4. Click the **OK** button to merge the selected years which are then displayed in the pastoral structure separated with a **/** as shown in the following example.



Additional Options for Special Schools

Special schools are able to create a year that is not associated with a National Curriculum year where all pupils/students are exempt from the National Curriculum.

Where only some of the pupils/students taught in the school are exempt, an **Exempt Year** can be defined in addition to a normal range of Year Groups that are associated with National Curriculum years.

> *NOTE: It is also possible to create an Exempt from National Curriculum Year in the Next Academic Year.*

Adding an Exempt Year from National Curriculum Year

1. Select the required pastoral structure.
2. Highlight the Pastoral Structure tree and select **Setup Curriculum Years** to display the **Curriculum Years Taught** dialog.
3. At the bottom of the list of **Curriculum Years Taught** dialog, select the **Exempt from National Curriculum Year** check box.

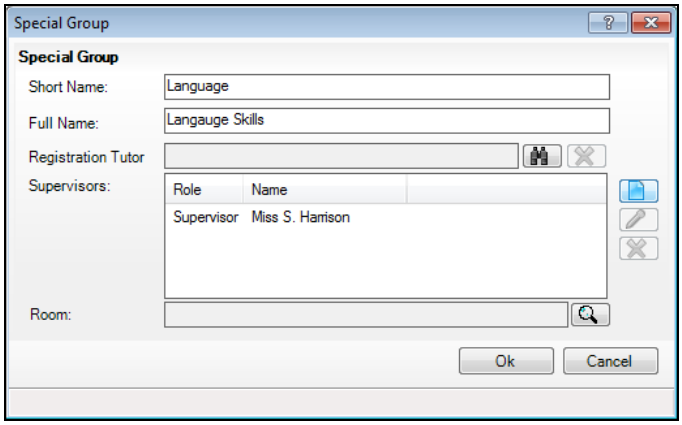
> *NOTE: This option is only available if your school was initially set up as a Special School when running the SIMS Configuration Utility. Please contact your Support Unit if this check box is required, but not visible.*

4. Click the **OK** button to save the details. There are a number of options available to you at this point. You can:
   - Associate a student with the Exempt Year Group directly, by selecting this option from the **Year Group** drop-down list in the **Registrations** panel of the **Pupil** (or **Student**) **Details** page.
   - Define a new year group and associate it with the Exempt from National Curriculum Year that you have defined. If you choose this option, you must also create a Registration Group to associate with the Exempt from National Curriculum year group.

Adding/Editing a Special Registration Group

Some schools may have the need for Special Registration Groups. These enable schools to combine the registration of students with Special Educational Needs of varying ages.

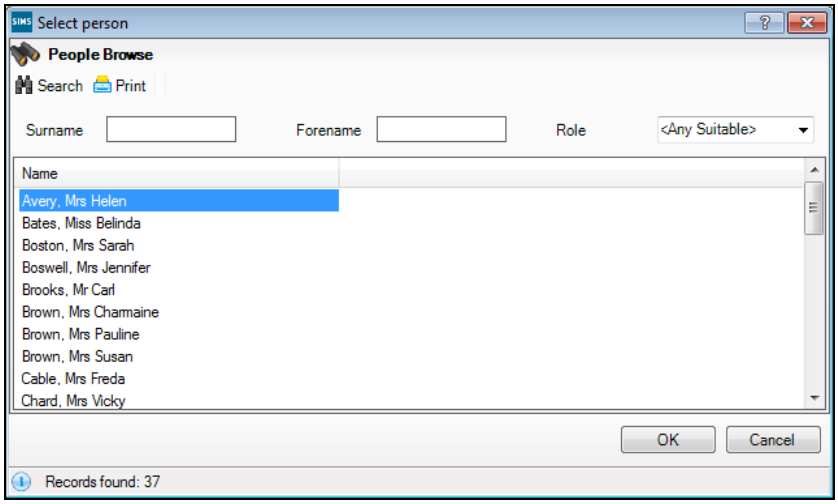
1. Select the required pastoral structure.
2. Right-click the **Pastoral Structure** tree and select **New Special Group** from the pop-up menu to display the **Special Group** dialog.



3. Enter a Short Name and Full Name for the Special Unit Registration Group.

   The **Full Name** (up to 32 characters) is used throughout SIMS to identify the group, the **Short Name** (up to 10 characters) is used in columnar reports when using the Reporting tool in SIMS. Both names must be unique within the school.

4. Select the **Registration Tutor** by clicking the **Browser** button to display the **Select person** browser.



5. Enter a **Surname**, **Forename** or select a **Role** from the drop-down list and click the **Search** button. Alternatively, leave all the fields blank to search for all staff.

   Only members of staff who have already been defined as teachers within your SIMS system are available for selection.

6. Highlight the required person from the list displayed and click the **OK** button to set them as the Special Group Registration Tutor.
7. To add a new supervisor, click the **New** button adjacent to the **Supervisors** panel to display the **Supervisor Properties** dialog. Highlight the required name and click the **Edit** button to edit an existing supervisor.

   New button

   Edit button

8. Select the **Role** from the drop-down list then click the **Browser** button adjacent to the **Person** field to display the **Select person** browser. Select the required person in the same way as for the Registration Group tutor.

   > *NOTE: By default, the **Role** drop-down list displays **Supervisor, Pastoral Manager** and **Joint Main Supervisor**.*

9. Click the **OK** button on the **Supervisor Properties** dialog to select the person as the Supervisor for the Special Group.
10. Click the **OK** button on the **Special Group** dialog to save the details.

Saving the Amended Pastoral Structure

Once the required changes have been made to the structure, click the **Save** button on the toolbar to save the structure. This may take some time depending on the amount of changes that have been made.

07 | Setting Up the School Diary

Introduction **107**
Changing the School Diary View **107**
Setting up the School Diary **111**
Adding / Editing Events **113**
Adding / Editing Recurring Events **114**
Deleting Events **116**

Introduction

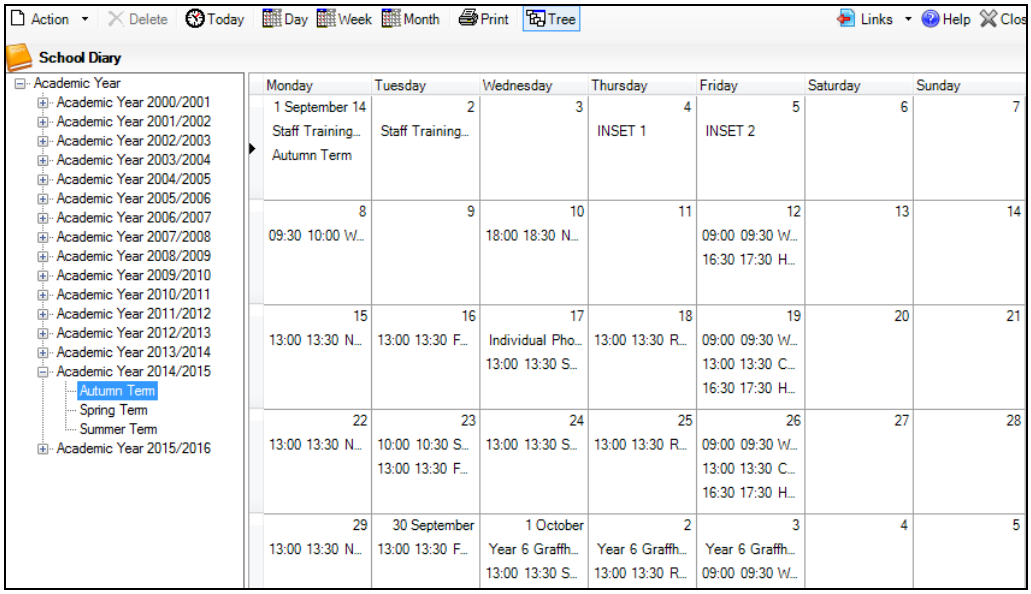
The School Diary is used to provide information on all the events and important dates for the school. When an academic year is created, the key dates are also added to the school diary, i.e. term dates, half-term holidays, public holidays, etc. In addition, you can add other school events to the School Diary such as school trips, staff meetings and parent's evenings, etc.

Changing the School Diary View

Unlike a normal diary, the School Diary is based on academic years. By default, the current academic year is displayed, but it is also possible to view previous and future academic years (providing future years have been defined).

In addition, you can change the view to look at events on a specific **Day**, **Week** or **Month**.

Select **Focus | School | School Diary** to display the **School Diary** page.

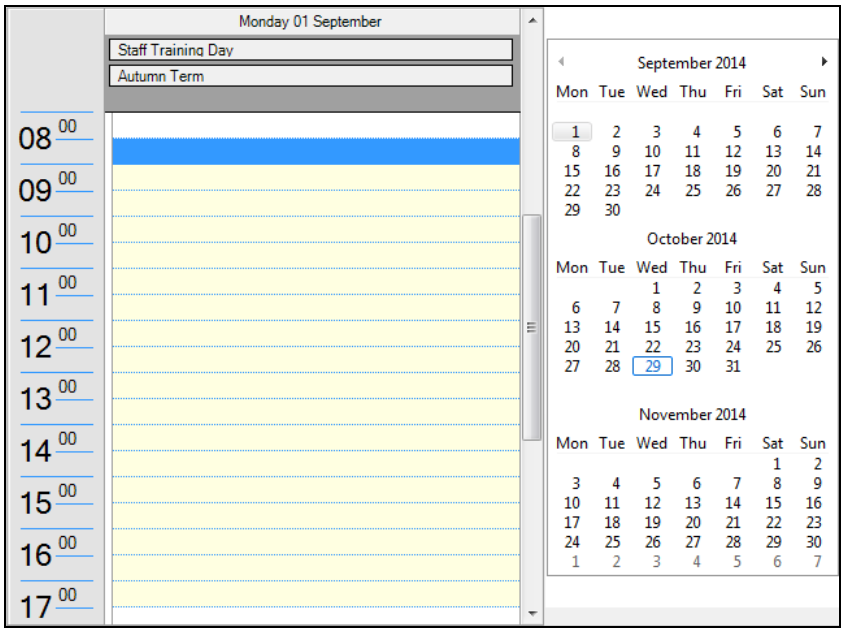


Changing the View to Today

Click the **Today** button on the toolbar to switch to a single day view based on today's date.

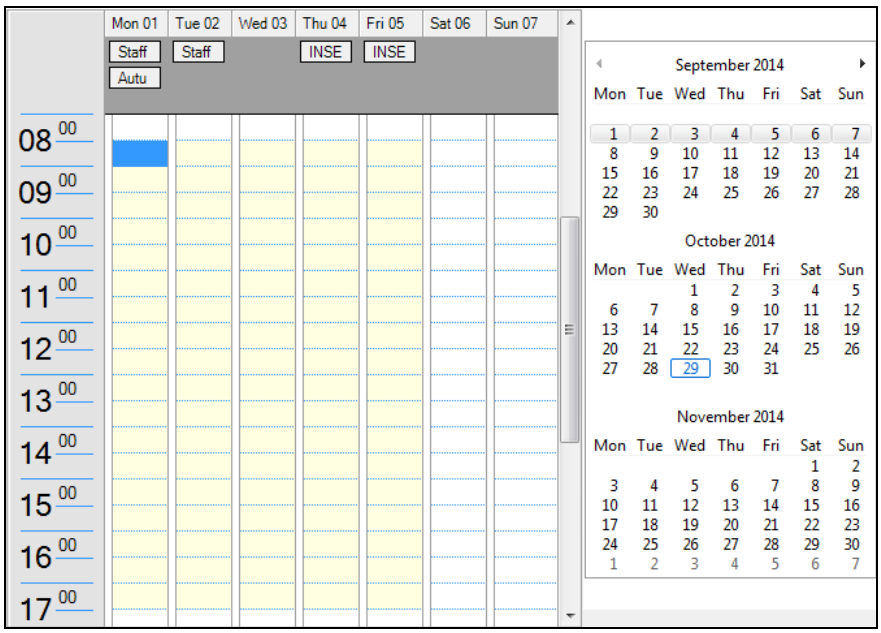
Changing the View to a Day

Click the **Day** button on the toolbar to switch to a single day view. You can then select the required day to view from the **Date Selector** on the right-hand side of the School Diary. Click the required date to view the events on that day.



Changing the View to a Week

Click the **Week** button on the toolbar to switch the view to show the current week.

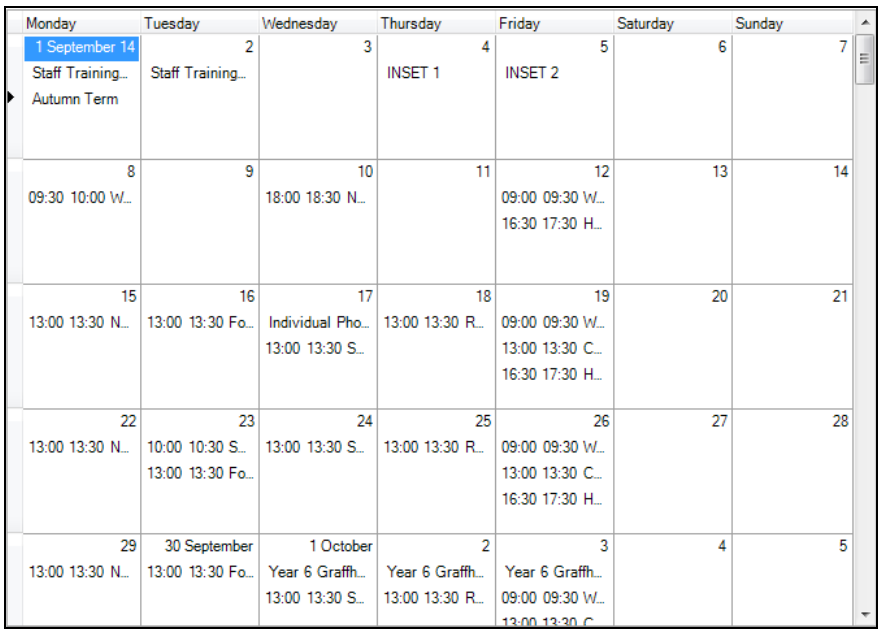


NOTE: Boarding schools who selected the appropriate registration sessions when SIMS was first set up can also see weekends.

You can change the week displayed by selecting the appropriate date from the **Date Selector** on the right-hand side of the School Diary.

Changing the View to a Month

Click the **Month** button on the toolbar to switch the view to show the current month.



Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1 September 14 Staff Training... Autumn Term	2 Staff Training...	3	4 INSET 1	5 INSET 2	6	7
8 09:30 10:00 W...	9	10 18:00 18:30 N...	11	12 09:00 09:30 W... 16:30 17:30 H...	13	14
15 13:00 13:30 N...	16 13:00 13:30 Fo...	17 Individual Pho... 13:00 13:30 S...	18 13:00 13:30 R...	19 09:00 09:30 W... 13:00 13:30 C... 16:30 17:30 H...	20	21
22 13:00 13:30 N...	23 10:00 10:30 S... 13:00 13:30 Fo...	24 13:00 13:30 S...	25 13:00 13:30 R...	26 09:00 09:30 W... 13:00 13:30 C... 16:30 17:30 H...	27	28
29 13:00 13:30 N...	30 September 13:00 13:30 Fo...	1 October Year 6 Graffh... 13:00 13:30 S...	2 Year 6 Graffh... 13:00 13:30 R...	3 Year 6 Graffh... 09:00 09:30 W...	4	5

You can scroll down through the remaining months of the academic year.

Selecting Another Academic Year

The School Diary defaults to displaying the current academic year. It is possible however, to view events in previous or future academic years.

Select another academic year by expanding the **Academic Year** section (click the **+** icon) in the tree to list all the available academic years. If preferred, you can select a specific term by expanding the individual academic year.

You can hide this 'tree' view by clicking the **Tree** button on the toolbar. This is a toggle button and therefore, clicking on the button switches the 'tree' view back on.

Setting up the School Diary

Once the current academic year has been set up (which would have been done when SIMS was first used), the School Diary is ready to use.

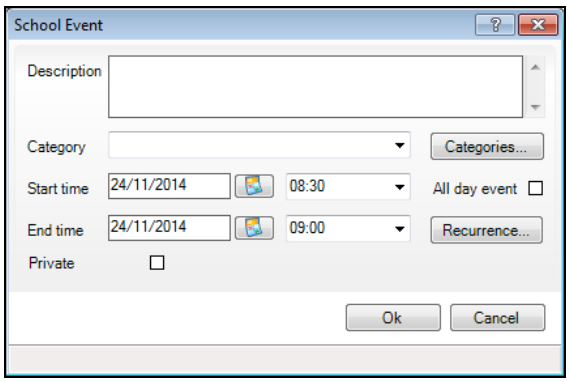
Each entry that is added to the School Diary is referred to as an Event. An event can be anything that you wish to record in the diary. Events can be organised into categories which can be used when reporting. For example, in addition to the default set of event categories, you may wish to add additional categories, such as Staff Meetings, Sports Practise, etc. This would therefore enable you to create reports on specific types of events. For example, a report could be produced listing all the staff meetings that occurred in a specific academic year.

Adding/Editing Event Categories

You can define the Event Categories all at once, or they can be added on an ad-hoc basis at the point when individual events are added to the diary, whichever is preferable.

The following instructions describe how to add event categories all at once. Subsequent categories can be added at any point in the future using the same method or added at the same time an event is created (please see *Adding/Editing Events* on page *113*).

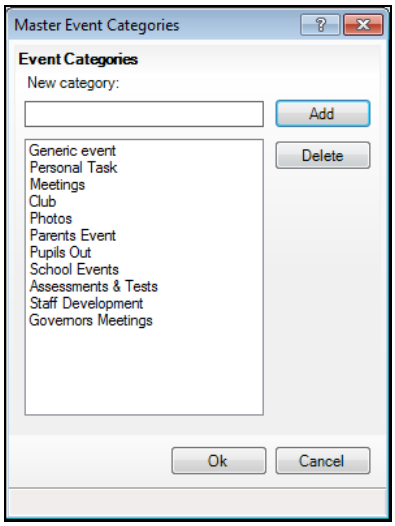
1. Select **Focus | School | School Diary** to display the **School Diary** page.
2. Click the **Action** button to display the **School Event** dialog, or click the down arrow adjacent to the **Action** button, select the **Create New Event** from the pop-up menu followed by the required event type from the drop-down list (please note that the **School Event** dialog is named according to the type of event you are creating).



3. Click the **Categories** button to display the **Master Event Categories** dialog.

> *NOTE: Any default or existing entries are listed in the lower section of the dialog.*

4. Enter the name of the category in the **New Category** field then click the **Add** button. The new category is displayed in the lower section. Repeat for all the categories to be added. The following graphic shows some examples of other user-defined categories.



5. Once you have finished adding additional categories, click the **OK** button.
6. You can also add an event at this point (please see *Adding/Editing Events* on page *113*). If you do not wish to add an event, click the **Cancel** button.

Deleting Event Categories

Any default or existing categories can be deleted if required.

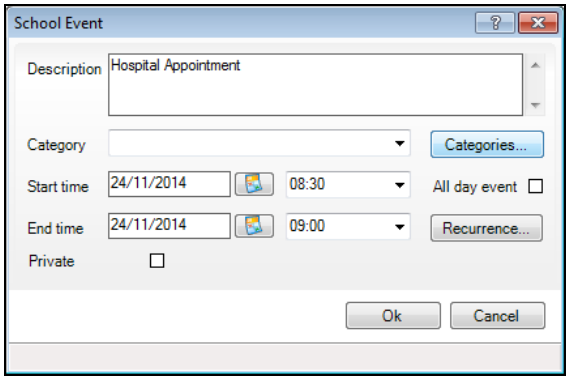
> *NOTE: Any existing events using the deleted category are unaffected.*

1. Double-click any existing event to display the **School Event** dialog.
2. Click the **Categories** button to display the **Master Event Categories** dialog.
3. Highlight the required category and click the **Delete** button. Repeat as required.
4. Click the **OK** button then click the **Cancel** button on the **School Event** dialog.

Adding / Editing Events

There are several ways in which events can be added to the diary depending on the view that is currently displayed.

1. Select **Focus | School | School Diary** to display the **School Diary** page. If required, change the academic year (please see *Selecting Another Academic Year* on page *110*).
2. Use any of the following methods to display the **School Event** dialog (please note that the dialog is named according to the type of event you are creating).
   - Click the **Action** button to create a new school event.
   - Double-click anywhere on the **School Diary** view (either **Day**, **Week** or **Month** view).
   - Right-click anywhere on the **School Diary** view (either **Day**, **Week** or **Month** view) and select **New School Event** from the pop-up menu. You can select any of the other menu items if you wish to create a different type of event.



3. Enter a **Description** for the event. This description is displayed in the School Diary.
4. Select the relevant **Category** from the drop-down list.

> *NOTE: You can create new categories at this point if required (please see* Adding/Editing Event Categories *on page* 111*).*

5. If the event is planned for an entire day, select the **All day event** check box. This causes the time drop-down lists to disappear.
   - Specify the **Start Time** for the event by entering the required date (if different from the default) or click the **Calendar** button to select the required date. Select the **Start time** from the drop-down list (only if the **All day event** check box was not selected).
   - Specify the **End time** for the event by entering the required date (if different from the default) or click the **Calendar** button to select the required date. Select the **End time** from the drop-down list (only if the **All day event** check box was not selected).

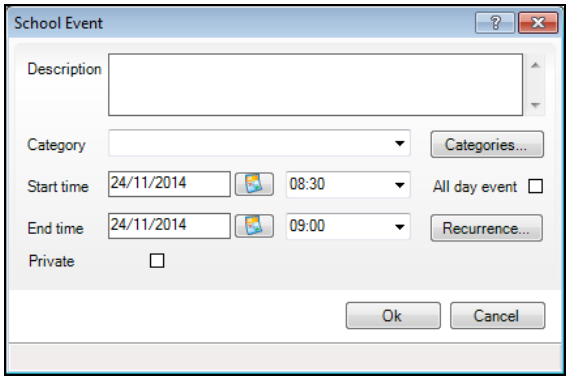
It is possible to create a recurring event. Please see the next section for more information.

6. Select the **Private** check box if the event is of a personal nature. This prevents other users from seeing the details of the event. The **Private** check box should not be used for normal school events. Any events that you mark as **Private** are only visible from your personal Home Page. Personal appointments and days off can be added to your individual **School Diary** view as reminders, etc.
7. Click the **OK** button to save the event.

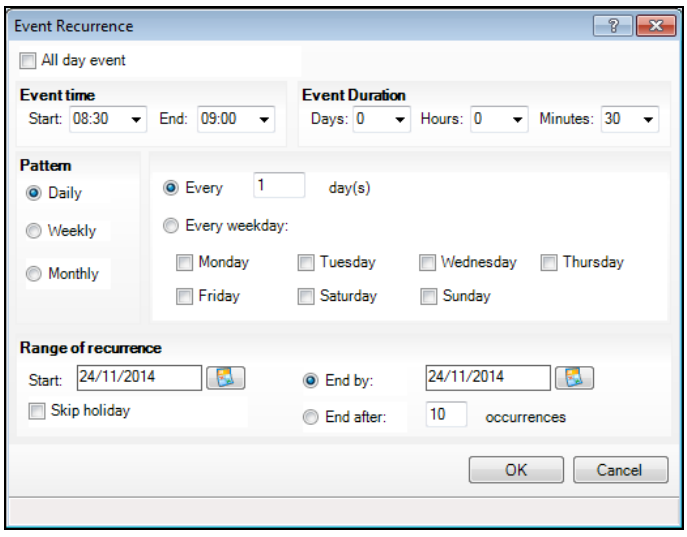
Adding / Editing Recurring Events

Some school diary events may occur on a regular basis such as staff meetings. To reduce the time spent on administration, it is possible to define an event once and to identify it as a recurring event so that you do not have to repeatedly enter the event details.

1. Select **Focus | School | School Diary** to display the **School Diary** page.
2. Click the **Action** button and select **Create New Event** followed by the required event type from the drop-down list.



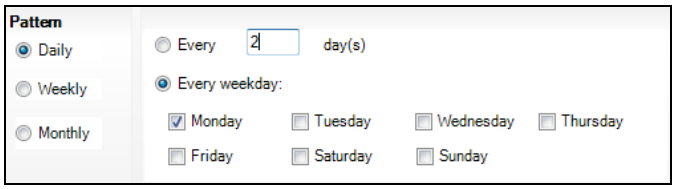
3. Enter a **Description** for the event and select the required **Category** from the drop-down list.
4. Click the **Recurrence** button to display the **Event Recurrence** dialog.



5. Select the **All day event** check box at the top of the dialog, if applicable. This disables the fields in the **Event time** and **Event Duration** panels.
6. Specify the **Event time** by selecting the **Start** and **End** times from the respective drop-down lists (only if the **All day event** check box was not selected).
7. Indicate the **Event Duration** by selecting from the **Days**, **Hours** and **Minutes** drop-down lists (only if the **All day event** check box was not selected).
8. Define the recurrence **Pattern** of the event by selecting the relevant radio button from the options supplied.
9. Select the **Daily**, **Weekly** or **Monthly** radio button in the **Pattern** panel, depending on the frequency of the recurrence.

Daily Pattern

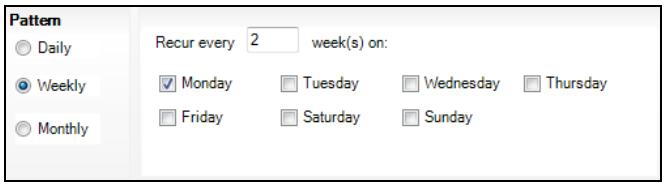
Two options are available when selecting a **Daily** pattern.



Daily Pattern

- Select the **Every** radio button and enter the number of days in which the event should be repeated e.g. entering a 2 in this field will cause the event to occur every two days.
- Alternatively, select the **Every Weekday** radio button if you wish to specify the days on which the event is scheduled to occur. Select the appropriate check boxes to denote the days on which the event is due to take place. The previous example shows an event being repeated every Monday.

Weekly Pattern



Weekly Pattern

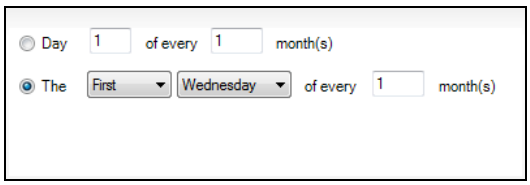
1. Enter the number of weeks in which the event should be repeated in the **Recur every** field e.g. entering a 2 here will cause the event to occur every two weeks.
2. Select the appropriate check boxes to denote the days on which the event will take place. The previous example shows an event being repeated every second week on a **Monday**.

Monthly Pattern

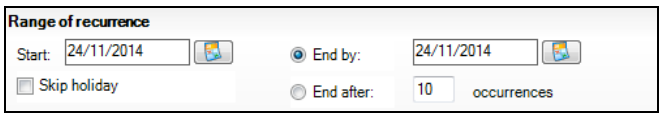
Two options are available when selecting a **Monthly** pattern.

Monthly Pattern

- To repeat the event on a specific date, select the **Day** radio button, enter the date adjacent to the radio button then enter the number of months in which the event should be repeated. In the previous example, the event is repeated on the **1**st of every month.
- Alternatively, to repeat an event on a specific day of the month, select the **The** radio button, then select the required values from the drop-down lists such as **First** and **Monday**. Enter the number of months in which the event should be repeated. The following example shows the event repeated on the **First Wednesday** of every month.



1. Specify the range of recurrence by entering the **Start** and **End by** dates of the recurrence or click the **Calendar** button and select the required dates.



Alternatively, select the **End after** radio button and enter the number of occurrences before the event ends.

2. Select the **Skip holiday** check box to suspend the recurrence of the event during the school holidays.
3. Click the **OK** button to save the recurring event.

Deleting Events

It is important to bear in mind that deleting a Teacher Training Day affects Attendance marks and Timetable details.

1. Select **Focus | School | School Diary** to display the **School Diary** page.
2. To remove an existing School Diary Event, find the relevant date, highlight the entry and click the **Delete** button on the toolbar.

08 | Setting Up Behaviour Management

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Setting up Achievement Types 127
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Setting up Report Card Templates 136

Introduction

Behaviour Management is used to record, monitor and manage pupil/student behaviour in your school and consists of the following four areas:

- Behaviour
- Achievements
- Detentions
- Report cards.

The Behaviour area is used by schools to record incidences of misbehaviour, such as disruption, bullying, etc. and the outcome of such incidences. Information recorded in Behaviour Management can often be accessed via the **Links** panel on various pages in SIMS.

Each behaviour incident can be allocated a number of points. Points are recorded against the pupil/student across the current academic year and a cumulative points total is available. This enables schools to monitor and compare points for behaviour and achievements. A net points total, which is the result of subtracting the number of behaviour points from the number of achievement points, provides a useful overview of a pupil/student's conduct in school.

When recording behaviour incidents, some of the values available from drop-down lists can be edited to meet the specific needs of your school. You are advised to review these lookups and if necessary, remove any unwanted values, de-activate values so that they are not visible (they can be activated in the future if required) or add new values (please see *Editing Lookups* on page *154*).

The following lookups are available when recording behaviour events:

Lookup Name	Comment	Drop-Down List Name
Behaviour - Action Taken	What sanctions exist in your school? Are these available in this lookup?	Action Taken
Behaviour Activity Type	The activity during which the incident took place, e.g. English, Physical Education, etc.	Activity
Behaviour Location	Add/remove locations to match those in your school, e.g. Classroom, Corridor, Hall, etc.	Location
Behaviour Status	The status of the incident such as Resolved, Unresolved, More Information Required, etc.	Status
Behaviour Time	Does this lookup reflect the times in your school day?	Time
Intervention Type	The type of intervention that took place, e.g. communication with Home, Meeting, etc.	Intervention Type
Type of Bullying	The type of bullying that has occurred, e.g. Name Calling, Threatened, etc.	Type of Bullying

The following lookups are applicable when recording achievements:

Lookup Name	Comment	Drop-Down List Name
Achievement – Award Given	What outcomes do you have at your school, e.g. merits, certificates, etc.?	Awards Given
Achievement Subject	Do the values match applicable subjects in your school?	Activity Type

The following lookups are applicable when recording detentions:

Lookup Name	Comment	Drop-Down List Name
Detention Activity	What activities can pupil/students be asked to carry out during their detention, e.g. homework, special assignment, etc.?	Select Activities dialog (accessed from the **Linked Activities** panel)
Detention Frequency Type	How frequently can detentions be repeated, e.g. daily, weekly, etc.?	Frequency

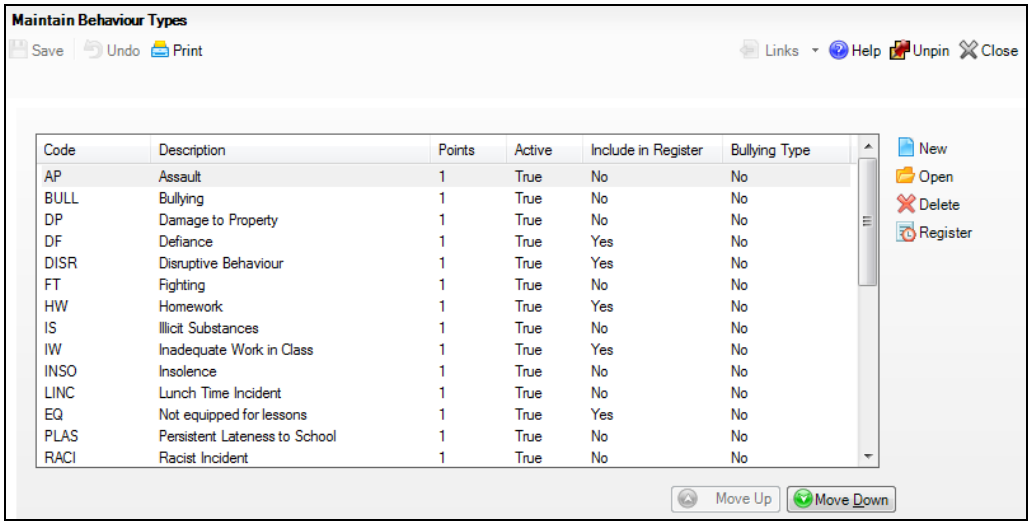
The following lookups are applicable when recording report cards:

Lookup Name	Comment	Drop-Down List Name
Report Card Target Type	What targets do you want to set pupil/students who will be on report, e.g. produce homework, punctuality, discipline, etc.	Select Target Types dialog accessed via the **Targets** panel.

Before using Behaviour Management, you are strongly advised to set up the types of behaviour, achievement and detention that can be recorded at your school. This includes reviewing the default types supplied by Capita SIMS and, if necessary, deleting unwanted types and recording new types. You are also advised to keep all lists (including lookups) as short as possible to restrict the options a user can select and also to increase the value of data analysis.

Setting up Behaviour Types

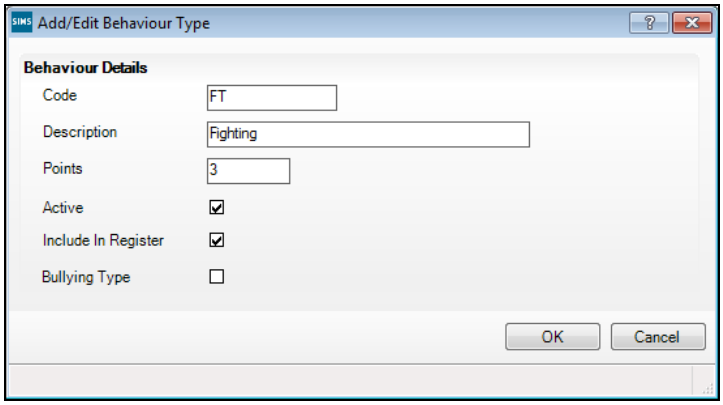
1. Select **Tools | Setups | Behaviour Management | Behaviour Type** to display the **Maintain Behaviour Types** page.



2. Before creating a behaviour type, ensure that it does not already exist by scrolling through the list.

> *NOTE: Adjust the order in which behaviour types are displayed in drop-down lists throughout SIMS, if required (please see* Adjusting the Order of Behaviour Types *on page* 121*).*

3. Click the **New** button or highlight an existing behaviour type then click the **Open** button to display the **Add/Edit Behaviour Type** dialog.



4. Enter a unique **Code** (up to a maximum of 10 characters), e.g. FT and a **Description**, e.g. Fighting. The description is displayed in the **Type** drop-down list when recording behaviour incidents.
5. Enter the default **Points** value for the behaviour type in accordance with your behaviour policy. This value will be assigned automatically when a behaviour incident is recorded but can be amended on an individual pupil/student basis, if required.
6. The **Active** check box is selected by default and indicates that the behaviour type will be available from drop-down lists. Deselect this check box if you do not want it to be available.

> *NOTE: If you deselect the **Active** check box, the **Include In Register** and **Bullying Type** check boxes cannot be selected.*

7. Select the **Include In Register** check box if you want this behaviour type to be available for selection when recording behaviour incidents via the register (please see *Making Behaviour Types Available via the Register* on page *122*).
8. Select the **Bullying Type** check box if you wish to associate this type of behaviour incident with bullying, enabling you to record additional information on the **Behaviour Incident Details** page. For example, if you associate **Racist Incident** with bullying, you can then record the **Type Of Bullying** as **Name Calling**, **Teasing**, etc (please see *Associating a Behaviour Type with Bullying* on page *123*).

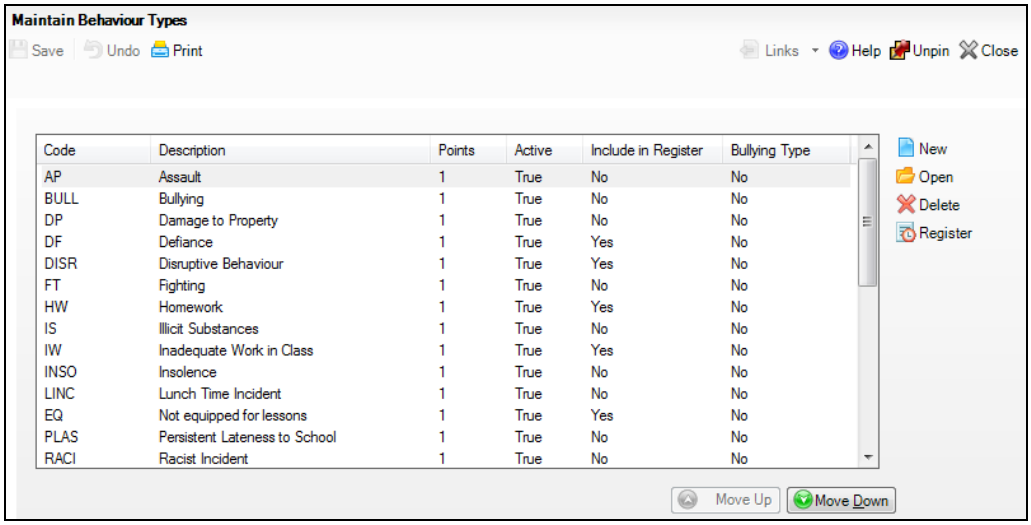
> ***IMPORTANT NOTE:** To record additional information regarding the incident, you must ensure the **Bullying Type** check box is selected for the **Bullying** behaviour type and any other behaviour types you want to associate with it.*

9. Click the **OK** button to add the behaviour type and return to the **Maintain Behaviour Types** page.

Adjusting the Order of Behaviour Types

It is possible to change the order in which behaviour types are displayed in behaviour **Type** drop-down lists. This functionality enables you to improve efficiency by positioning the behaviour types used most frequently at the top of the list.

1. Select **Tools | Setups | Behaviour Management | Behaviour Type** to display the **Maintain Behaviour Types** page.



By default, all behaviour types are displayed in alphabetical order and any behaviour types added manually are displayed at the bottom of the list.

2. Highlight the required behaviour type then click the **Move Up** or **Move Down** buttons to reposition the behaviour type as required.
3. Repeat for all required behaviour types until the list is displayed in the appropriate order.
4. Click the **Save** button to save the changes.

Setting Behaviour Types as Inactive

Behaviour types can be set as inactive so that they are not available for selection from drop-down lists.

A behaviour type cannot be deleted if it is assigned to a record in SIMS. Instead, you may wish to de-activate a behaviour type to ensure that it cannot be selected. This is particularly useful if you are consolidating several similar values, such as **Damage – Property** and **Damage – Vandalism** to a single value of **Damage**.

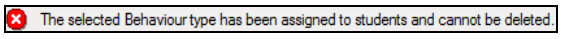
To de-activate a behaviour type, deselect the **Active** check box then click the **OK** button to return to the **Maintain Behaviour Types** page, where the **Active** column now displays **False** for the selected behaviour type.

Deleting Unwanted Behaviour Types

A behaviour type can be deleted if it was added in error or is no longer required. It can be deleted only if it has not been used in any saved records. If the behaviour type is required elsewhere in SIMS, it may not be possible to delete it. If you cannot delete a behaviour type, instead you may want to make it inactive (please see *Setting Behaviour Types as Inactive* on page *121*).

1. On the **Maintain Behaviour Types** page (via **Tools | Setups | Behaviour Type**), highlight a behaviour type then click the **Delete** button and click the **Yes** button to confirm the deletion.

   If the behaviour type is assigned to any pupil/students, the following message is displayed on the Status Bar.

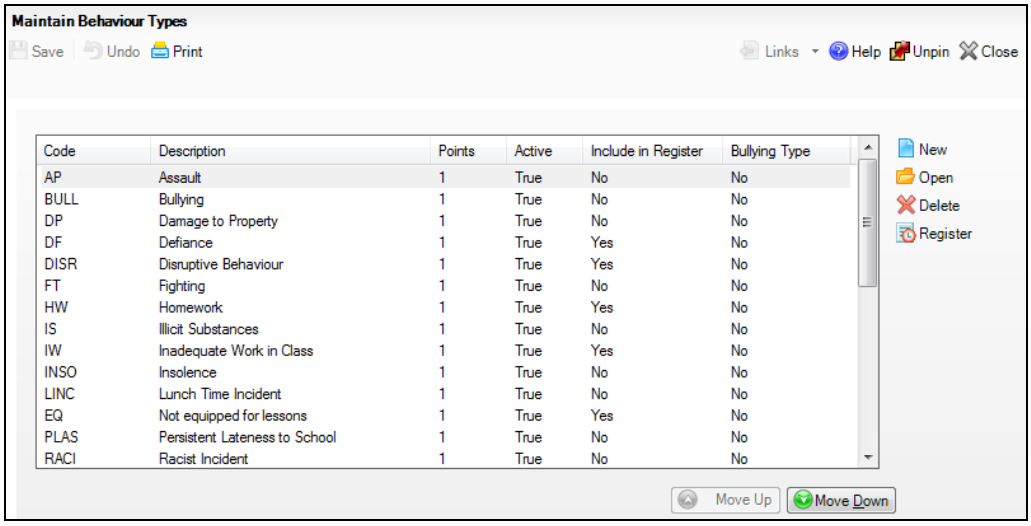
   

   This behaviour type cannot be deleted.
2. Click the **Save** button to save the change.

Making Behaviour Types Available via the Register

It is possible to record behaviour incidents directly via the register. Prior to doing this, you must indicate the types of behaviour incident you wish to be available via the register and you must ensure that these types have been marked as **Active**.

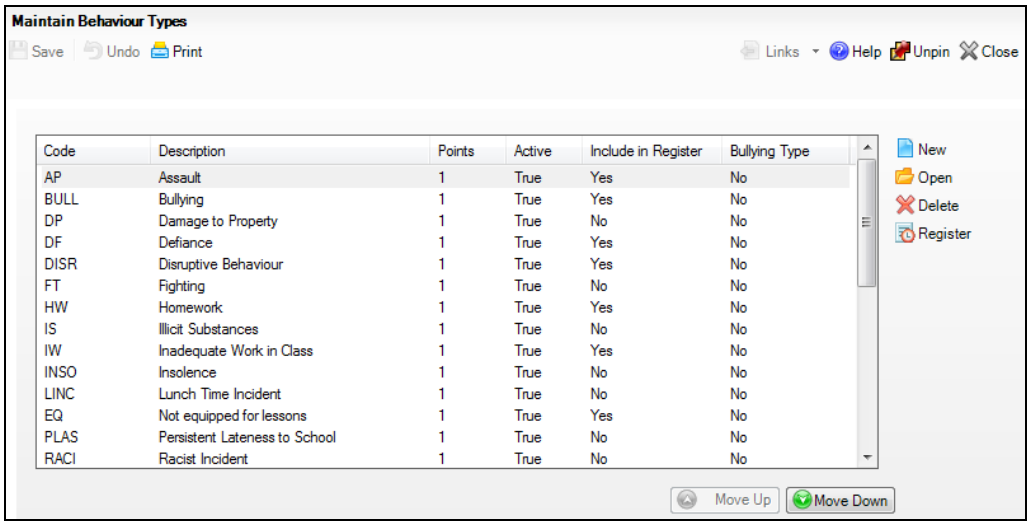
1. Select **Tools | Setups | Behaviour Management | Behaviour Type** to display the **Maintain Behaviour Types** page.



2. Highlight the behaviour incident type you wish to make available on the register.
3. In case the highlighted behaviour incident type is inactive, click the **Open** button to display the **Add/Edit Behaviour Type** dialog, select the **Active** check box and click the **OK** button. Behaviour types can be accessed via the register only if they are marked as **Active**.
4. To make a behaviour incident type accessible via the register, highlight it then click the **Register** button.

Multiple behaviour incident types can be made available by highlighting the required items (using **Shift+Click** or **Ctrl+Click)** then clicking the **Register** button.

The **Include in Register** column now displays **Yes**, indicating that it is available for selection via the register.



5. To make an item inaccessible via the register, highlight it then click the **Register** button again.
6. Click the **Save** button to save the changes.

Additional Resources:

Taking the Register chapter of the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook

Associating a Behaviour Type with Bullying

Associating a behaviour type with bullying enables you to record additional information regarding the incident on the **Behaviour Incident Details** page. For example, if you associate **Racist Incident** with bullying, then selecting this item from the **Type** drop-down list enables you to identify the **Type Of Bullying** as **Name Calling**, **Teasing**, etc.

> ***IMPORTANT NOTE:*** *In order to record additional information regarding the incident, you must ensure the* ***Bullying Type*** *check box is selected for the* ***Bullying*** *behaviour type and any other behaviour types you wish to associate with it.*

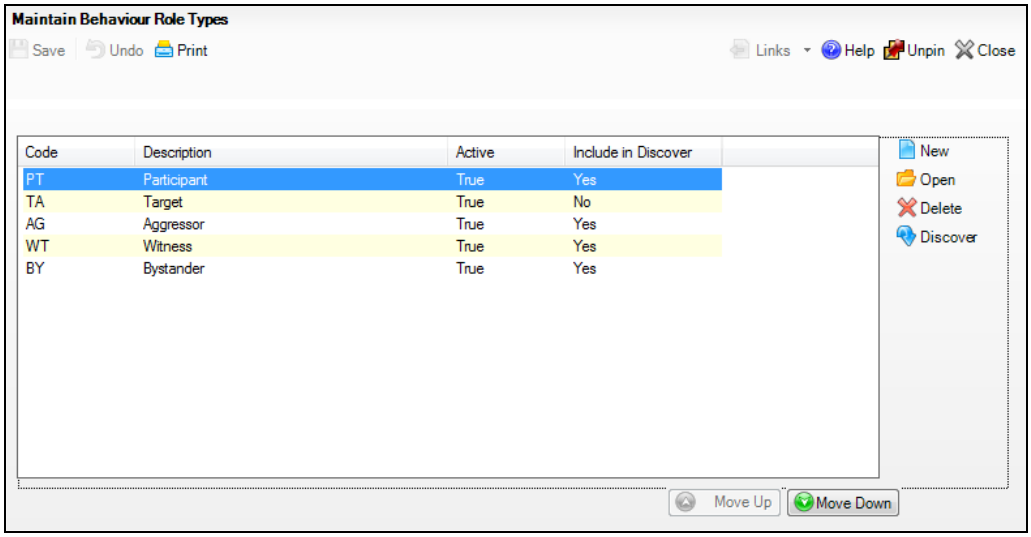
1. Select **Tools | Setups | Behaviour Management | Behaviour Type** to display the **Maintain Behaviour Types** page.
2. Highlight the behaviour incident type you wish to associate with bullying then click the **Open** button to display the **Add/Edit Behaviour Type** dialog.
3. Select the **Bullying Type** check box then click the **OK** button.

> *NOTE: The **Bullying Type** check box can be selected only if the **Active** check box is also selected.*

The **Bullying Type** column now displays **Yes**, indicating that it is now associated with bullying.

Setting up Behaviour Role Types

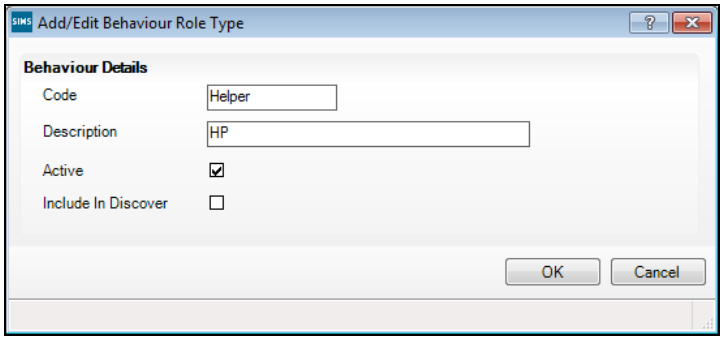
1. Select **Tools | Setups | Behaviour Management | Behaviour Role Type** to display the **Maintain Behaviour Role Types** page.



2. Ensure that the behaviour role type does not already exist.

> *NOTE: Adjust the order in which behaviour role types are displayed in drop-down lists throughout SIMS, if required (please see* Adjusting the Order of Behaviour Role Types *on page* 125*).*

3. Click the **New** button to display the **Add/Edit Behaviour Role Type** page.



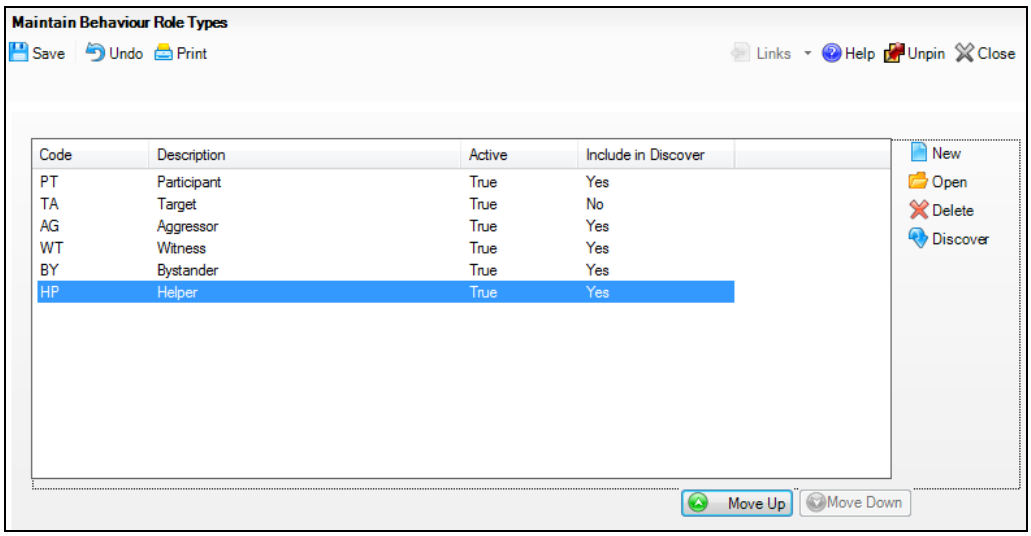
4. Enter a **Code**, e.g. HP and a **Description**, e.g. `Helper`. The description is displayed in the **Role** drop-down list when recording a behaviour.
5. The **Active** check box is selected by default and indicates that the behaviour role type will be available from the **Role** drop-down list when recording a behaviour.

6. Click the **Save** button.

Adjusting the Order of Behaviour Role Types

It is possible to change the order in which behaviour role types are displayed in the **Role** drop-down list when recording a behaviour. This functionality enables you to improve efficiency by positioning the behaviour role types used most frequently at the top of the list.

1. Select **Tools | Setups | Behaviour Management | Behaviour Role Type** to display the **Maintain Behaviour Role Types** page.



Any behaviour role types added manually are displayed at the bottom of the list.

2. Highlight the required behaviour role type then click the **Move Up** or **Move Down** buttons to reposition the behaviour role type as required.
3. Repeat for all required behaviour role types until the list is displayed in the appropriate order.
4. Click the **Save** button to save the changes.

Setting Behaviour Role Types as Inactive

Behaviour Role types can be set as inactive so that they are not available for selection from drop-down lists.

A behaviour role type cannot be deleted if it is assigned to a record in SIMS. Instead, you may wish to deactivate a behaviour role type to ensure that it cannot be selected. This is particularly useful if you are consolidating several similar values, such as **Bystander** and **Observer** to a single value of **Passive Behaviour**.

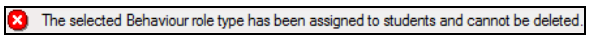
1. Select the behaviour role type that you want to deactivate.
2. Click the **Open** button to display the **Add/Edit Behaviour Role Type** dialog.
3. Deselect the **Active** check box then click the **OK** button to return to the **Maintain Behaviour Role Types** page, where the **Active** column now displays **False** for the selected behaviour role type.

Deleting Unwanted Behaviour Role Types

A behaviour role type can be deleted if it was added in error or is no longer required. It can be deleted only if it has not been used in any saved records. If the behaviour role type is required elsewhere in SIMS, it may not be possible to delete it. If you cannot delete a behaviour role type, instead you may want to make it inactive.

1. On the **Maintain Behaviour Role Types** page (via **Tools | Setups | Behaviour Role Type)**, highlight a behaviour role type then click the **Delete** button and click the **Yes** button to confirm the deletion.

   If the behaviour role type is used elsewhere in SIMS, the following message is displayed on the Status Bar.

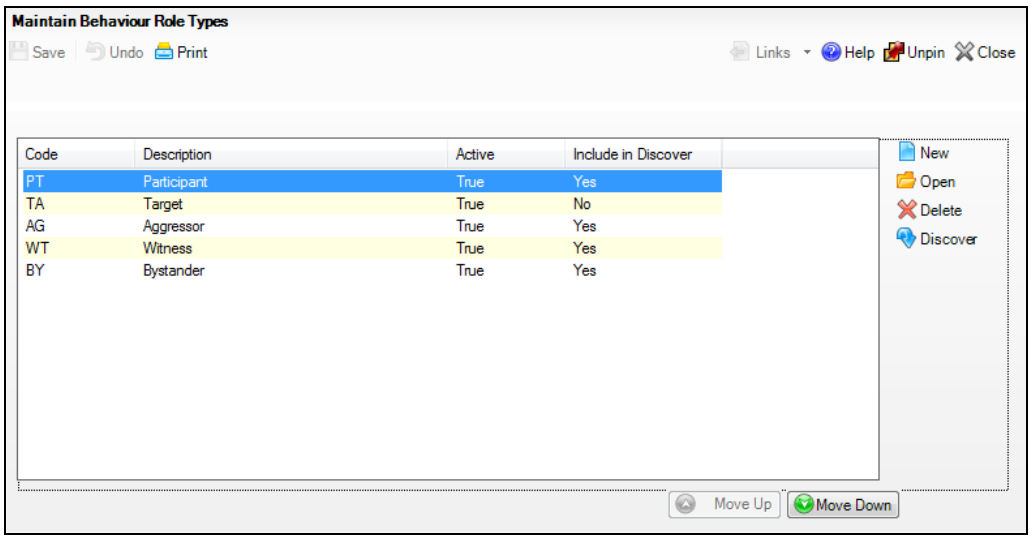
   

   This behaviour role type cannot be deleted.
2. Click the **Save** button to save the change.

Making Behaviour Role Types Available via Discover

It is possible to record behaviour role types directly via Discover. Prior to doing this, you must indicate the types of behaviour role you wish to be available via Discover and you must ensure that these types have been marked as **Active**.

1. Select **Tools | Setups | Behaviour Management | Behaviour Role Type** to display the **Maintain Behaviour Role Types** page.



2. Highlight the behaviour role type you wish to make available on the discover.
3. In case the highlighted behaviour role type is inactive, click the **Open** button to display the **Add / Edit Behaviour Role Type** dialog, select the **Active** check box and click the **OK** button. Behaviour role types can be accessed via Discover only if they are marked as **Active**.
4. To make a behaviour role type accessible via Discover, highlight it then click the **Discover** button.

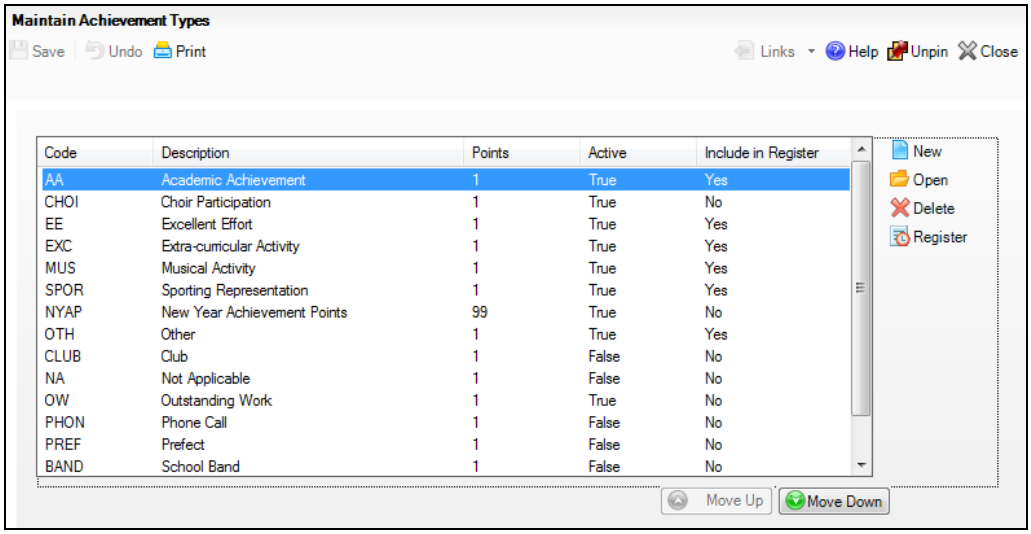
Multiple behaviour role types can be made available by highlighting the required items (using **Shift+Click** or **Ctrl+Click**) then clicking the **Discover** button.

The **Include in Discover** column now displays **Yes**, indicating that it is available for selection via Discover.

5. To make an item inaccessible via Discover, highlight it then click the **Discover** button again.
6. Click the **Save** button to save the changes.

Setting up Achievement Types

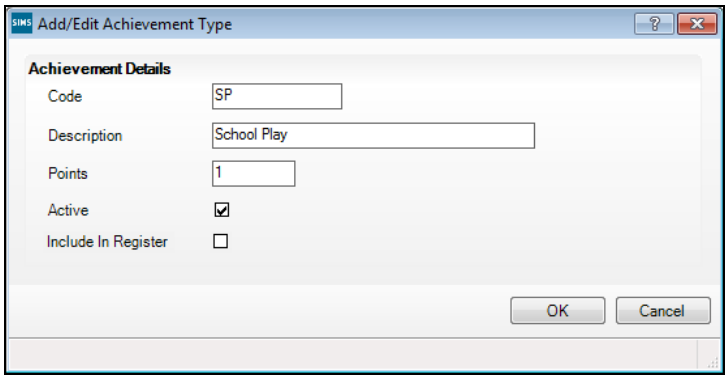
1. Select **Tools | Setups | Behaviour Management | Achievement Type** to display the **Maintain Achievement Types** page.



2. Ensure that the achievement type does not already exist by scrolling through the list.

> *NOTE: Adjust the order in which achievement types are displayed in drop-down lists throughout SIMS, if required (please see* Adjusting the Order of Achievement Types *on page* 128*).*

3. Click the **New** button to display the **Add/Edit Achievement Type** page.

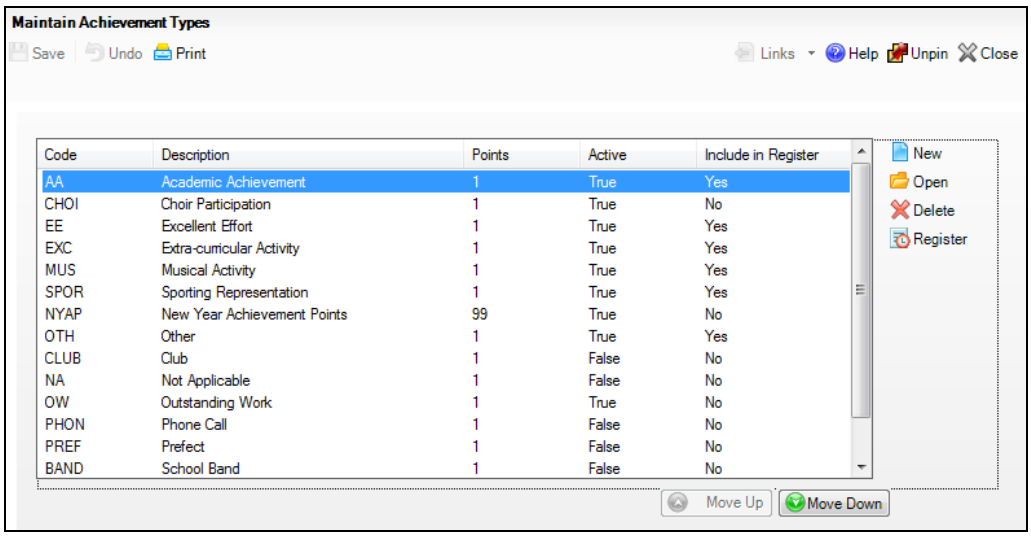


4. Enter a **Code**, e.g. SP and a **Description**, e.g. School Play. The description is displayed in the **Type** drop-down list when recording an achievement.
5. Enter the default **Points** value for the achievement type in accordance with your school policy. This value will be assigned automatically when the achievement is recorded but can be amended on an individual pupil/student basis, if required.
6. The **Active** check box is selected by default and indicates that the achievement type will be available from the **Type** drop-down list when recording an achievement.
7. Click the **Save** button.

Adjusting the Order of Achievement Types

It is possible to change the order in which achievement types are displayed in achievement **Type** drop-down list. This functionality enables you to improve efficiency by positioning the achievement types used most frequently at the top of the list.

1. Select **Tools | Setups | Behaviour Management | Achievement Type** to display the **Maintain Achievement Types** page.



By default, all achievement types are displayed in alphabetical order and any achievement types added manually are displayed at the bottom of the list.

2. Highlight the required achievement type then click the **Move Up** or **Move Down** buttons to reposition the achievement type as required.
3. Repeat for all required achievement types until the list is displayed in the appropriate order.
4. Click the **Save** button to save the changes.

Setting Achievement Types as Inactive

Achievement types can be set as inactive so that they are not available for selection from drop-down lists.

An achievement type cannot be deleted if it is assigned to a record in SIMS. Instead, you may wish to de-activate an achievement type to ensure that it cannot be selected. This is particularly useful if you are consolidating several similar values, such as **School Play** and **School Band** to a single value of **School Performance**.

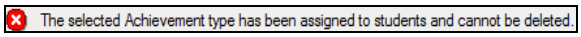
To de-activate an achievement type, deselect the **Active** check box then click the **OK** button to return to the **Maintain Achievement Types** page, where the **Active** column now displays **False** for the selected achievement type.

Deleting Unwanted Achievement Types

An achievement type can be deleted if it was added in error or is no longer required. It can be deleted only if it has not been used in any saved records. If the achievement type is required elsewhere in SIMS, it may not be possible to delete it. If you cannot delete an achievement type, instead you may want to make it inactive (please see *Setting Achievement Types as Inactive* on page *129*).

1. On the **Maintain Achievement Types** page (via **Tools | Setups | Behaviour Type**), highlight an achievement type then click the **Delete** button and click the **Yes** button to confirm the deletion.

   If the achievement type is used elsewhere in SIMS, the following message is displayed on the Status Bar.

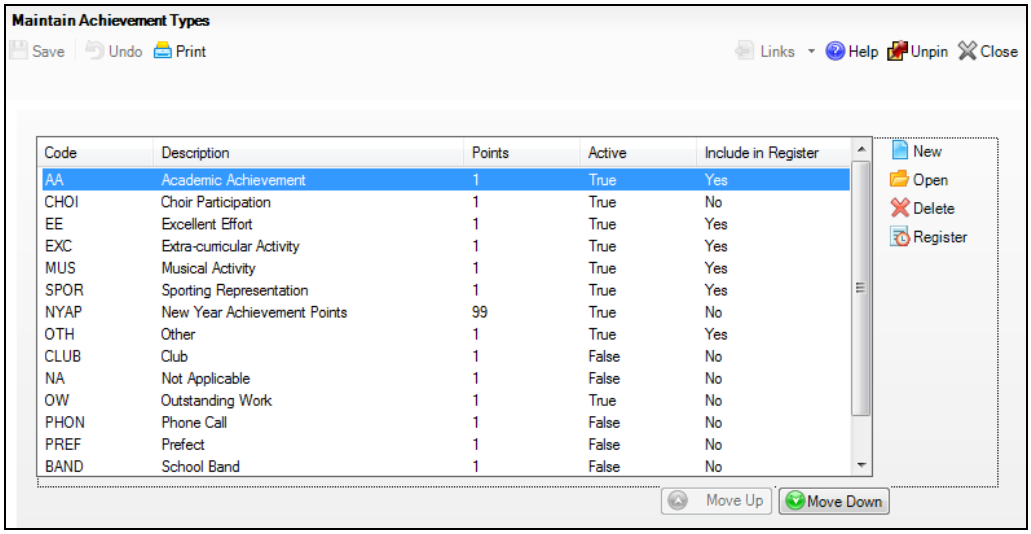
   

   This achievement type cannot be deleted.
2. Click the **Save** button to save the change.

Making Achievement Types Available via the Register

It is possible to record achievements directly via the register. Prior to doing this, you must indicate the types of achievement you wish to be available via the register and you must ensure that these types have been marked as **Active**.

1. Select **Tools | Setups | Behaviour Management | Achievement Type** to display the **Maintain Achievement Types** page.



2. Highlight the achievement type you wish to make available on the register.
3. In case the highlighted achievement type is inactive, click the **Open** button to display the **Add/Edit Achievement Type** dialog, select the **Active** check box and click the **OK** button. Achievement types can be accessed via the register only if they are marked as **Active**.
4. To make an achievement type accessible via the register, highlight it then click the **Register** button.

   Multiple achievement types can be made available by highlighting the required items (using **Shift+Click** or **Ctrl+Click**) then clicking the **Register** button.

   The **Include in Register** column now displays **Yes**, indicating that it is available for selection via the register.
5. To make an item inaccessible via the register, highlight it then click the **Register** button again.
6. Click the **Save** button to save the changes.

Additional Resources:

Taking the Register chapter of the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook

Setting up Detention Types

The different types of detention that may occur on a regular basis, such as missing a break time for minor incidents or after-school detentions for more serious behaviour incidents, can be recorded in SIMS.

> *NOTE: The setting up of detention types is optional.*

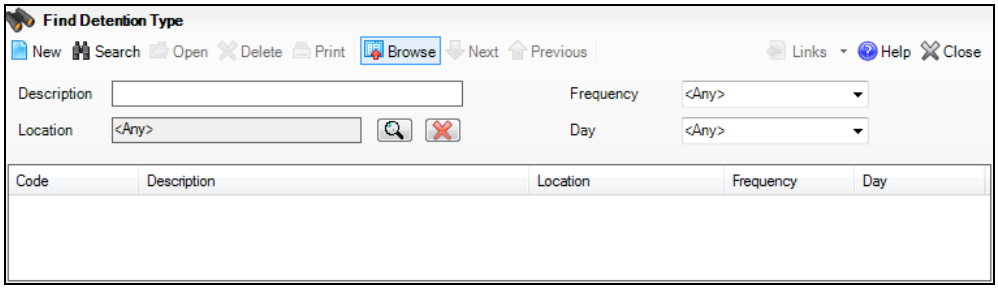
Pastoral Detention
Pastoral type detentions may involve the detention of pupil/student by staff involved with them on a day to day basis and they may be supervised by the Head of Year or other designated member of staff, during breaks and lunchtime, usually to complete work.

Departmental Detention
Further disciplinary action in the form of an after-school detention may be required for persistent misbehaviour. These detentions may be set up by the Head of the Department to occur once or twice a week.

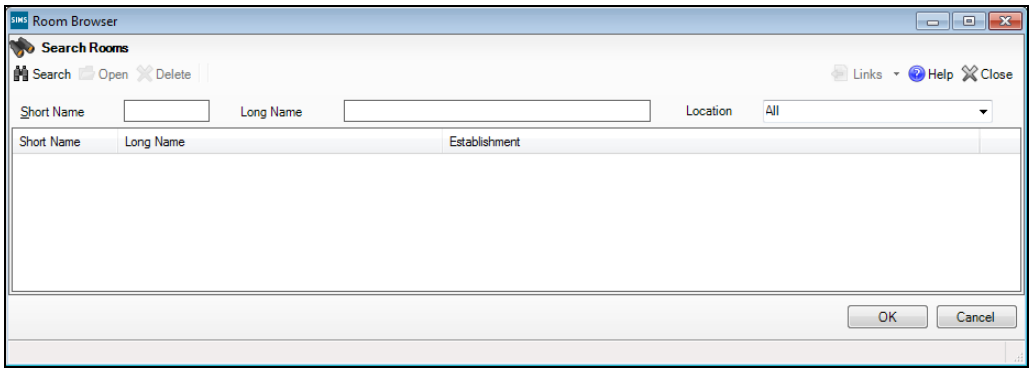
Special Detention
For serious offences, pupil/students can be referred to the Head Teacher or a senior member of staff who may decide to monitor pupil/students during an after-school detention period, set-up on a weekly basis.

Searching for a Detention Type

1. Select **Tools | Setups | Behaviour Management | Detention Type** to display the **Find Detention Type** browser.



2. Enter the **Description** of the detention type.
3. To search by room, click the **Browser** button adjacent to the **Location** field to display the **Room Browser** dialog.

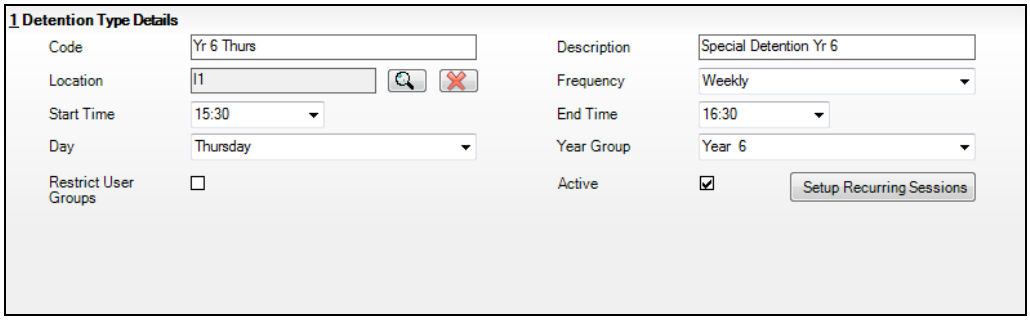


   a. Enter the **Short Name** or **Long Name** of the required room.
   b. Select the **Location** of the room from the drop-down list.
   c. Click the **Search** button to display all the rooms that match the search criteria entered.
   d. Highlight the required room then click the **OK** button to return to the **Find Detention Type** browser.
4. To remove a **Location** added in error, click the adjacent **Delete** button.

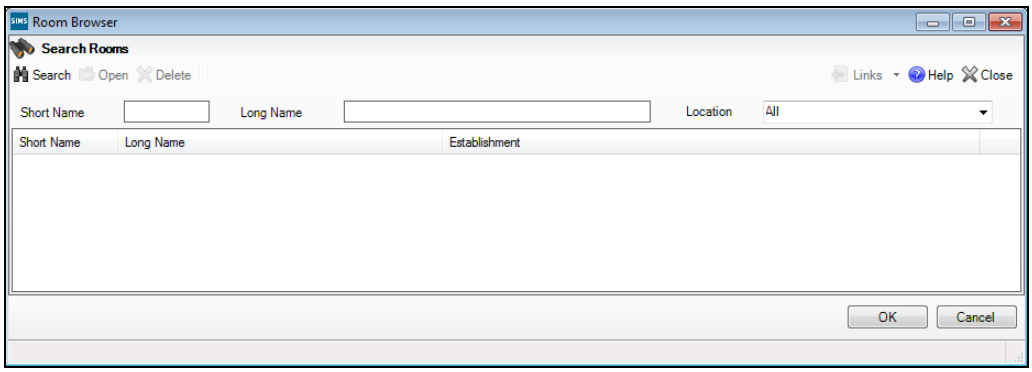
5. Select the **Frequency** of the detention type or the **Day** on which the detention is held from the drop-down lists.
6. Click the **Search** button to display all detention types that match the search criteria entered.

Adding/Editing Detention Types

1. Select **Tools | Setups | Behaviour Management | Detention Type** to display the **Find Detention Type** browser.
2. Search for and highlight the required detention type (please see *Searching for a Detention Type* on page *131*) then click the **Open** button or click the **New** button to display the **Detention Type Details** page.



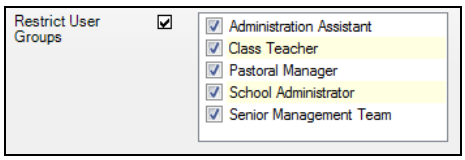
3. Enter a unique **Code** for the detention type, e.g. `Yr 6 Thurs`.
4. Enter an appropriate **Description** for the detention type, e.g. `Special Detention Year 6`.
5. Click the **Browser** button adjacent to the **Location** field to display the **Room Browser** dialog.



6. Enter either a **Short Name** or a **Long Name**, or select its **Location** from the drop-down list.
7. Click the **Search** button to display the rooms that match the search criteria entered.
8. Highlight the required room then click the **OK** button to return to the **Detention Type Details** page, where the **Location** is displayed.
9. Select the required **Frequency** from the drop-down list. The options available from the drop-down list can be changed (please see *Editing Lookups* on page *154*) using the Detention Frequency Type lookup (via **Tools | Lookups | Maintain**).

10. Select the **Start Time** and the **End Time** from the drop-down list.
11. Select the required **Day** from the drop-down list, if applicable. If you are setting up a daily detention, the **Day** drop-down list is not applicable.
12. Select the **Year Group** for which this detention type applies. If the detention type is applicable to several year groups, this field should remain blank.

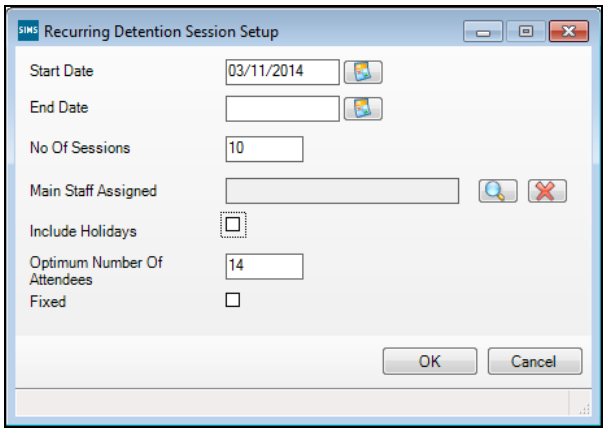
    When a detention session record is created (via **Focus | Behaviour Management | Maintain Detentions**), the types of detention that can be selected for the session can be restricted to users who have specific roles assigned to them in System Manager. Restricting the types of detention that can be created ensures that detention sessions set up by Senior Management, for example, cannot be modified inadvertently by other users.
13. To apply a restriction to the detention type, so that only specific users can create detention sessions of this type, select the **Restrict User Groups** check box to display a table of user roles. Deselect the check box if you want the detention type to be available to all users.



14. Select the check box of the user role(s) you want to have access to this detention type.
15. The **Active** check box is selected automatically. If you do not want the detention type to be used immediately, deselect this check box.
16. Click the **Save** button.

Setting up Recurring Detention Sessions

1. To set up recurring detention sessions (e.g. weekly), click the **Setup Recurring Sessions** button to display the **Recurring Detention Session Setup** dialog.



2. The **Start Date** defaults to today's date but can be changed by entering a new date or by clicking the **Calendar** button then selecting a new date.

3. Enter the **End Date** for the recurrence of detention sessions. Alternatively, leave this blank and enter the total number of detention sessions (from the **Start Date**) in the **No Of Sessions** field.

*NOTES: If a **Start Date** and **End Date** are entered, the detention session will occur on the selected **Day** and continue to occur at the **Frequency** specified in the **Detention Type Details** panel, until the **End Date** is reached. For example, if:*

*the frequency is set to **Weekly***
*the day is set to **Thursday***
*the **Start Date** is set to 21/06/2014*
*the **End Date** is set to 21/07/2014*

the first detention session will commence on Thursday 21 June and the last session will occur on Thursday 19 July.

*If an **End Date** is not entered or if you enter a value in the **No Of Sessions** field (in which case the **End Date** field becomes blank), the detention session will occur on the selected **Day** and will continue to occur at the **Frequency** specified in the **Detention Type Details** panel until the **No Of Sessions** is reached. For example, if:*

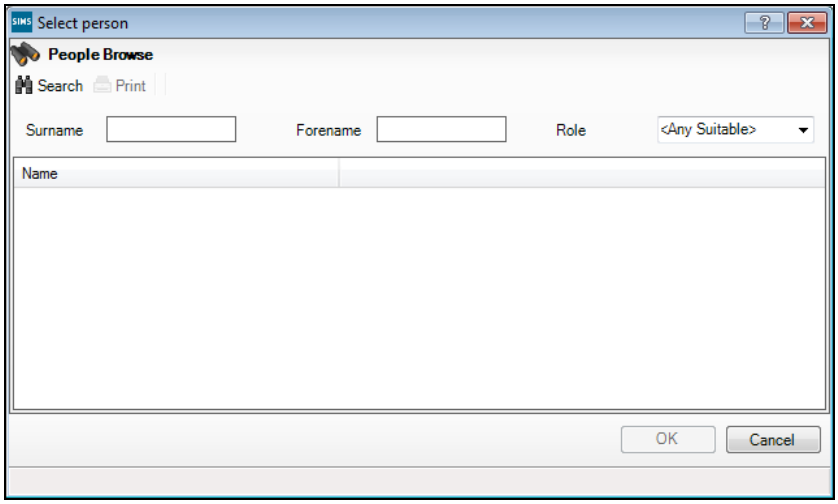
*the frequency is set to **Weekly***
*the day is set to **Monday***
*the **Start Date** is set to 30/04/2012*
*the **No Of Sessions** is set to 10*

the first detention session will commence on Monday 30 April, and the last session will occur on Monday 2 July.

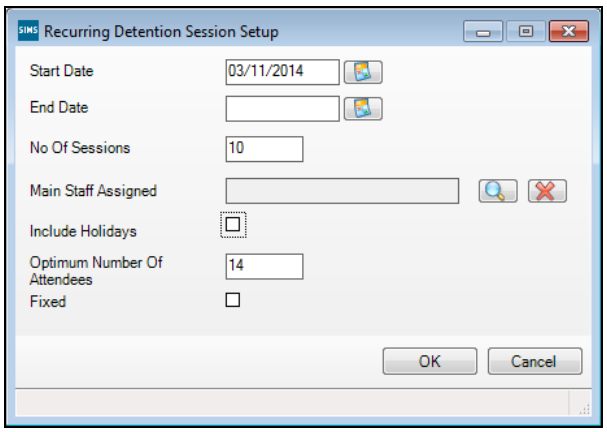
If the changes made when editing recurring detention types remove sessions that pupil/students are assigned to, you are prompted to remove the pupil/students linked to these sessions before you can save the changes.

A staff member can be assigned to the recurring detention. This is particularly useful if a particular member of staff hosts specific detention types. The selected staff member's name is displayed by default when detentions of this type are dispensed but can be changed for each detention if required.

4. To assign a member of staff to a recurring detention, click the **Browser** button adjacent to the **Main Staff Assigned** field to display the **Select person** dialog.



5. Enter the required staff member's **Surname** or **Forename**.
6. Select their **Role** from the drop-down list.
7. Click the **Search** button to display all members of staff who match the search criteria entered.
8. Highlight the required member of staff then click the **OK** button to return to the **Recurring Detention Session Setup** dialog, where the selected staff member's details are displayed.



9. A member of staff added in error can be remove by clicking the adjacent **Delete** button.
10. To enable the detention session to be held during a holiday period, select the **Include Holidays** check box.

> *NOTE: If you are setting up a detention that includes Saturdays, you must select the **Include Holidays** check box.*

11. The **Optimum Number Of Attendees** field defaults to the value set in the **Maximum Group Size** field of the selected room (via **Focus | School | Rooms**). If the **Maximum Group Size** field is blank, the **Optimum Number of Attendees** field will default to blank. This value can be edited for the selected detention session only (i.e. it does not affect the default value assigned to the room).
12. If you wish to enforce a rule that ensures no more than the **Optimum Number Of Attendees** attend the detention session, select the **Fixed** check box.
13. Click the **OK** button to save the recurring detention settings and return to the **Detention Type Details** page, where the **Detention Sessions** panel displays the recurring detention.
14. Click the **Save** button.

Setting Detention Types as Inactive

Detention types can be set as inactive so that they are not available for selection from drop-down lists.

A detention type cannot be deleted if it is assigned to a record in SIMS. Instead, you may wish to de-activate a detention type to ensure that it cannot be selected. This is particularly useful if you are consolidating several similar values, such as **Lunch Time Detention – Monday** and **Lunch Time Detention – Tuesday** to a single value of **Lunch Time Detention - Daily**.

To de-activate a detention type, deselect the **Active** check box then click the **Save** button.

Setting up Report Card Templates

A report card template enables the selection of a set of targets that a pupil/student is required to achieve over the course of the report card period and the list of subjects you wish to associate with it. It also enables you to select the columns you wish to include on the report. Once defined, the re-usable report card template can be applied to a report card record so that the record inherits the pre-defined attributes of the template. Using a template reduces the need to repeatedly create report cards with similar structures.

Once a template is applied to a report card record:

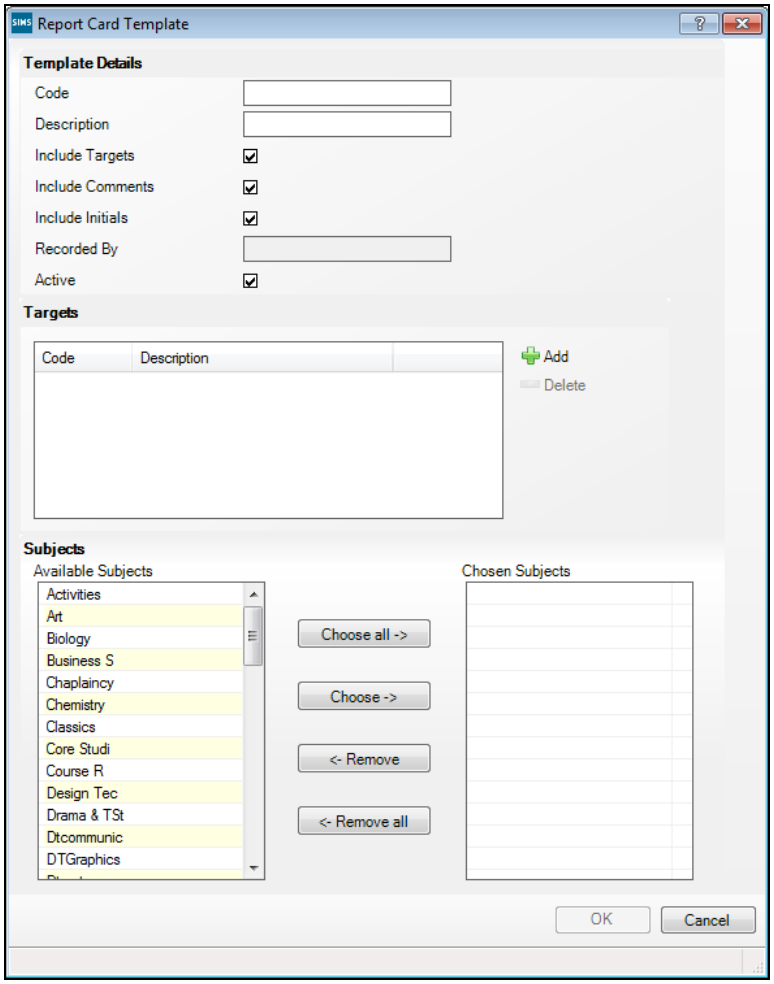
- the individual targets applied to the report card can be added to or removed
- the attributes of the report card template can no longer be edited (with the exception of the **Code**, **Description** and **Active** flag).

When a pupil/student is issued with a report card, this is indicated on the **Take Register** page (via **Focus | Attendance** (or **Lesson Monitor**) **| Take Register**) by the appearance of a **®** symbol in the pupil/student's **Name** field and their row is displayed in red text. If a report card template has been applied to the report card, the template **Code** is also appended to the **Name** field.

1. Select **Tools | Setups | Behaviour Management | Report Card Template** to display the **Add/Edit Report Card Template** page.

   The **Report Card Templates** panel displays all the templates recorded in SIMS.

2. Click the **New** button or highlight an existing template then click the **Open** button to display the **Report Card Template** dialog.



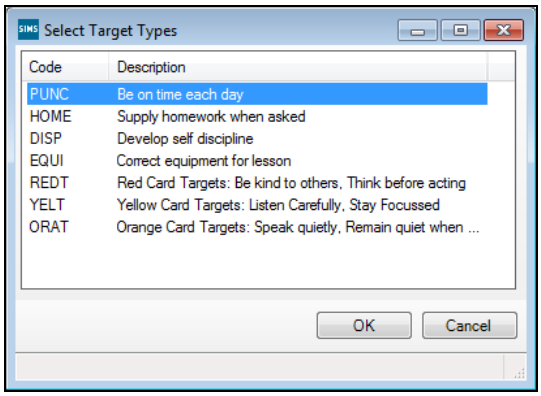
3. Enter a unique **Code** and **Description** for the report card template.

4. Indicate the columns you wish to display on the report card by selecting the **Include Targets**, **Include Comments** and **Include Initials** (the initials of the main supervisor from the timetable, based on subject) check boxes. These check boxes are selected by default.

   When the report card template is saved for the first time, the **Recorded By** field is populated with the name of the current SIMS user.

5. If you want the report card template to be available immediately, leave the **Active** check box selected.

6. Select the targets you wish to include in the template by clicking the **Add** button to display the **Select Target Types** dialog.



7. Highlight the required target(s) then click the **OK** button to return to the **Report Card Template** dialog, where the selected **Targets** are displayed. The targets available for selection are those marked as **Active** in the Report Card Target Type lookup (via **Tools | Lookups | Maintain**) that have not already been selected for inclusion on the report card template.

8. Unwanted targets can be removed by highlighting them and clicking the **Delete** button.

9. Select the **Subjects** you wish to include as part of the report card template.

> *NOTES: Subjects are displayed on a report card only if you are licensed to use Lesson Monitor.*
>
> *When a report card template is applied to a report card, the generated report card displays a line for each day on which a class associated with a selected subject is scheduled to take place.*

- Select all **Available Subjects** by clicking the **Choose all** button to move all subjects to the **Chosen Subjects** list.
- Highlight one or more **Available Subjects** (using **Shift + click** or **Ctrl + click**, if required) then click the **Choose** button to move the selected subject(s) to the **Chosen Subjects** list.
- Highlight one or more **Chosen Subjects** (using **Shift + click** or **Ctrl + click**, if required) then click the **Remove** button to remove the selected subject(s) from the report card template.
- Remove all **Chosen Subjects** from the report card template by clicking the **Remove all** button.

10. Click the **OK** button to return to the **Add/Edit Report Card Template** page. The report card template details are displayed in the **Report Card Templates** panel.

The **Report Card Templates** panel displays the **Code** and **Description** of a template, together with an indication of whether **Targets**, **Comments** and **Initials** will be included on the report card.

The status of the report card template defaults to **Active**, indicating that it can be applied to a report card record. Deselect the **Active** check box if you do not want it to be available for selection in a report card.

When the template is saved, the **Recorded By** field displays the name of the SIMS user who saved the record.

11. Click the **Save** button to save the report card template.

Once a report card template is created, it can be used to populate report card records (via **Focus | Behaviour Management | Report Card**).

Additional Resources:

Applying a Report Card Template in the *Creating Report Cards* chapter of the *Managing Pupil/Students* handbook

More Information:

Cloning Report Card Templates on page *139*
Deleting Report Card Templates on page *140*

Cloning Report Card Templates

This functionality is particularly useful if you wish to use an existing report card template as the framework for a new one. Instead of creating a similar template from scratch, you can clone a current template, change its name then change the associated targets. The original template is preserved in its saved form.

1. From the **Add/Edit Report Card Template** page, click the **Clone** button on the toolbar to display the **Report Card Template** dialog.
2. Complete the details as required (please see *Setting up Report Card Templates* on page *136*).

   Any columns included on the report card, together with any **Targets** set and associated **Subjects**, are associated with the newly cloned template automatically.
3. Click the **Save** button to save the template details.

Deleting Report Card Templates

A report card template can be deleted if it was added in error and has never been associated with a report card record.

> *NOTE: If a report card template cannot be deleted, you may wish to make it inactive so that it is not available for selection on a report card.*

1. In the **Report Card Templates** panel of the **Add/Edit Report Card Template** page, highlight one or more templates then click the **Delete** button.
2. Click the **Yes** button to confirm the deletion.
3. Click the **Save** button to save the change.

More Information:
Setting up Report Card Templates on page *136*

09 | Customising SIMS

Creating User Defined Groups 141
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Importing and Maintaining Lookups 151
Configuring Ethnic Codes 158
Customising the SIMS Screen 158
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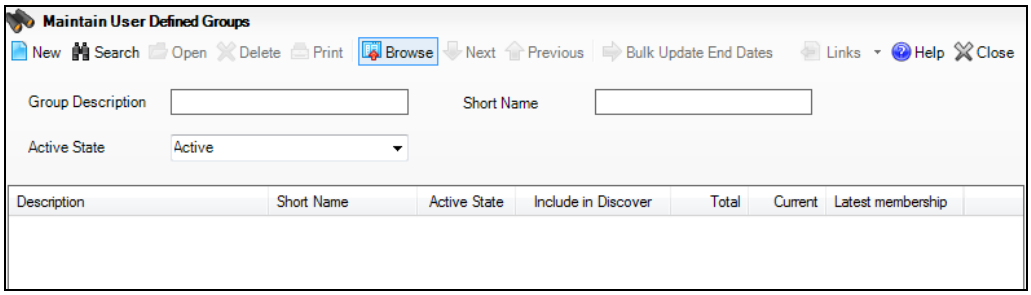
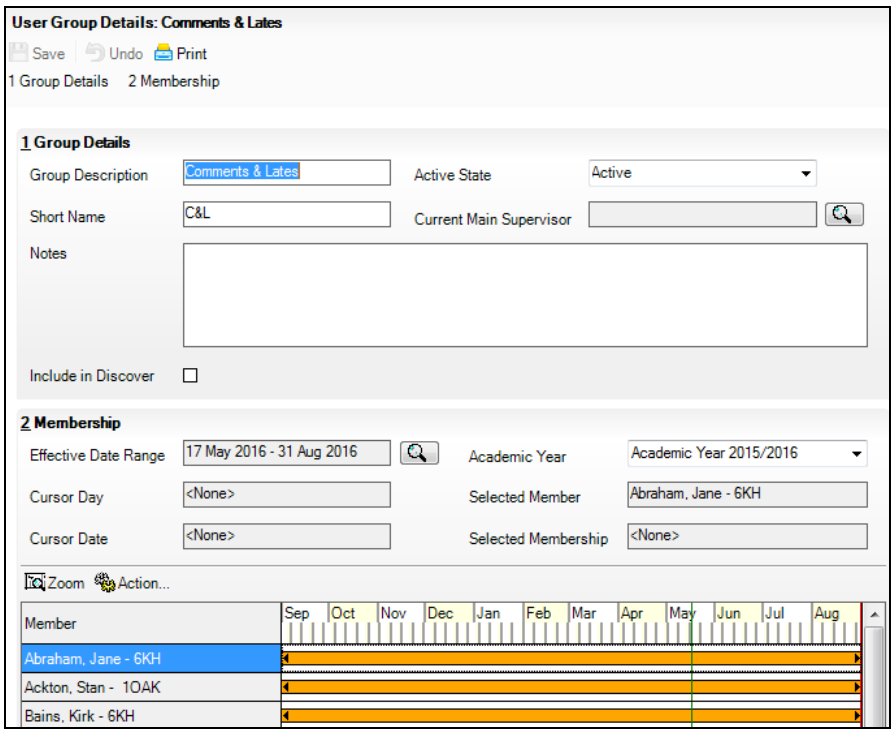
Creating User Defined Groups

User Defined Groups can be created to collect data for a group of related individuals. These can be pupil/students, members of staff, contacts, governors, etc. The individuals who are classed as members of a particular group can be amended throughout the life span of the group to reflect their involvement.

1. Select **Focus | Groups | User Defined Groups** to display the **Maintain User Defined Groups** browser.



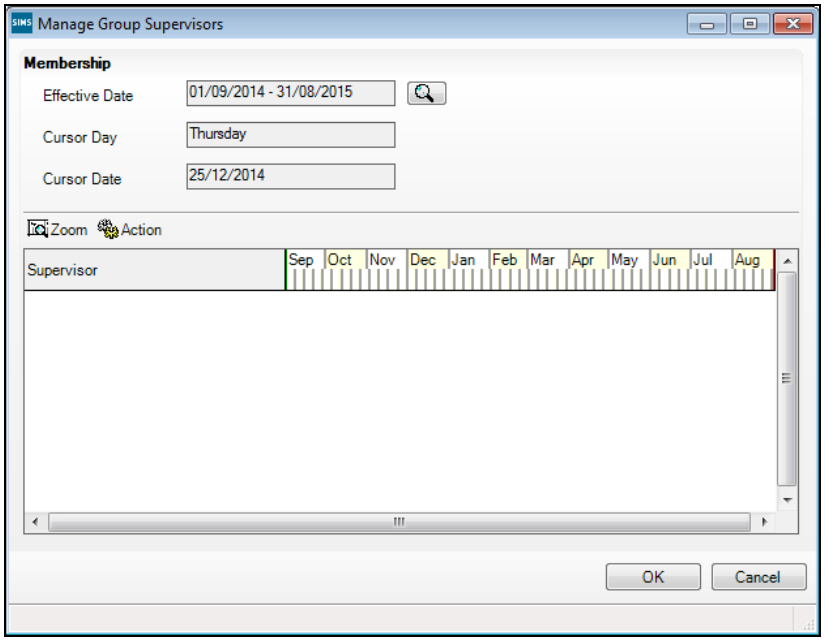
2. Search for and select a required group, or click the **New** button to create a new group. The **User Group Details** page is displayed.



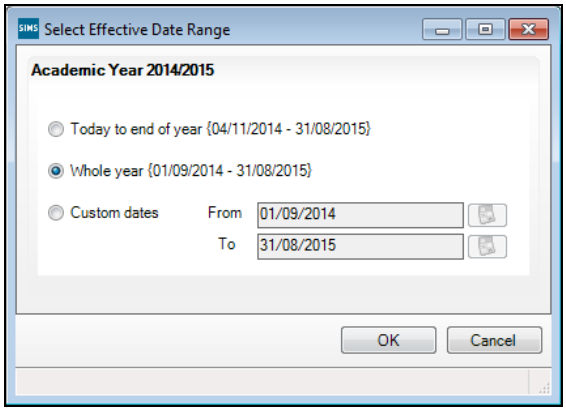
3. In the **Group Details** panel, enter a **Group Description** and a **Short Name** for the new group (used where there is limited space in reports).
4. Select the required **Active State** from the drop-down list. In most cases, this is **Active** unless you are not ready to use the group – in which case, set the state as **Inactive**.

Selecting the Group Supervisor

1. Select the supervisor of the group by clicking the **Browser** button adjacent to the **Current Main Supervisor** field. The **Manage Group Supervisors** dialog is displayed.

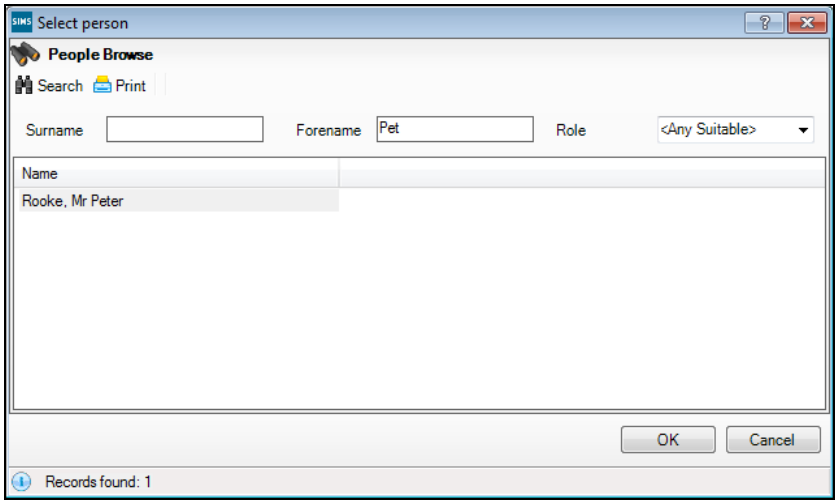


2. The supervisor's membership of the group defaults to the current academic year. To change this date range, click the **Browser** button adjacent to the **Effective Date** field to display the **Select Effective Date Range** dialog.

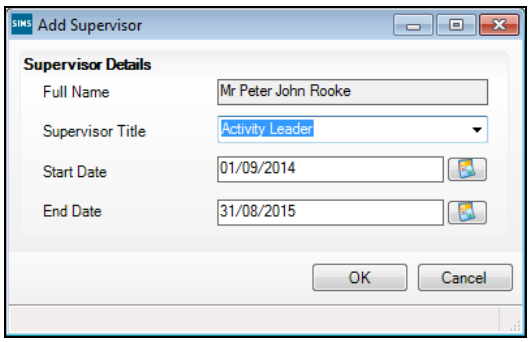


3. Select the required radio button then click the **OK** button.

4. Click the **Action** button and select **Add Supervisor** to display the **Select person** browser.

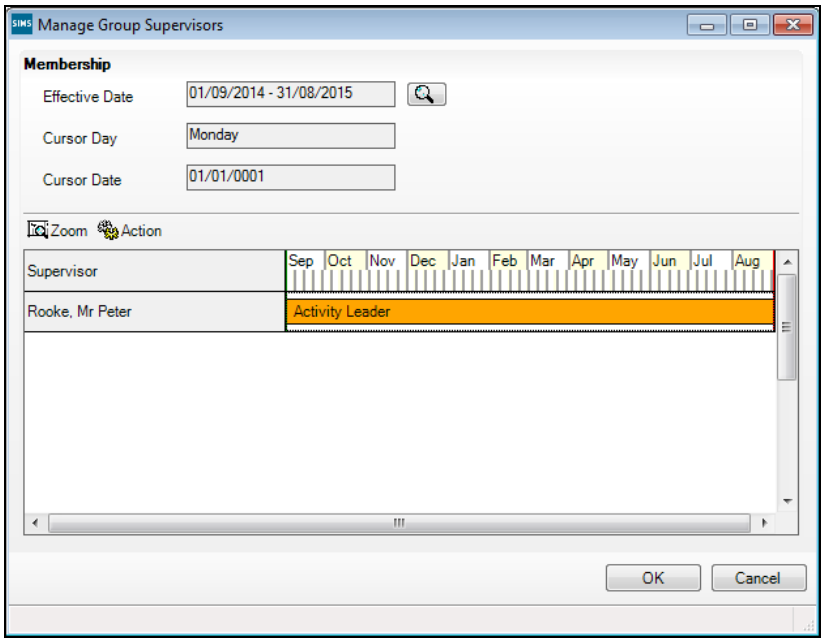


5. Search for the required person then click double-click their name to select them to display the **Add Supervisor** dialog.



6. Select the required **Supervisor Title** such as `Activity Leader`.

Enter the **Start** and **End Dates** identifying the period of time for which this person will be the group supervisor then click the **OK** button. The name of the selected supervisor is displayed in the **Manage Group Supervisors** dialog as shown in the following graphic.



7. Click the **OK** button on the **Manage Group Supervisors** dialog to return to the **User Group Details** page.
8. In the **Membership** panel, specify the **Effective Date Range** and select the relevant **Academic Year** from the drop-down list.

   The **Cursor Day** and **Cursor Date** fields are updated automatically to reflect the dates selected.
9. Click the **Action** button and select either **Add Student** or **Add Member**. Select **Add Student** to search solely for pupil/students. Select **Add Member** to broaden the search, enabling you to search for pupil/students, members of staff, parent/guardians, etc. and place them all in the group.

   To search solely for pupil/students:

   - Select **Add Student** to display the **Select Students** browser.
   - Enter the pupil/student's **Surname**, **Forename** and/or **Admission Number**.
   - Select their **Status**, **Tier**, **Year Group**, **Reg Group** and **House** (if known) from the drop-down lists.
   - Click the **Search** button to list all pupil/students who match the search criteria entered.
   - Highlight the required pupil/student(s) in the list then click the **OK** button to select their details.

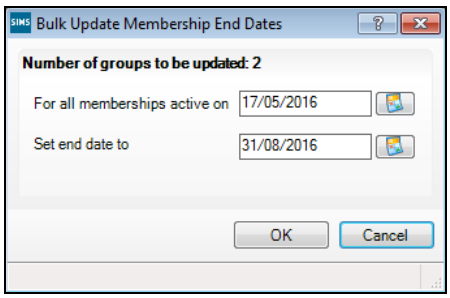
To search for people across a range of roles:

- Select **Add Member** to display the **Select Members** browser.
- Enter the individual's **Surname** and **Forename**. Their **Role** defaults to **Student** but can be changed, if required.
- Click the **Search** button to list everybody who matches the search criteria entered.
- Highlight the required person (or people) in the list then click the **OK** button to select their details.

10. Continue adding the group members in this way until all involved have been selected.
11. The following functionality can also be carried out by highlighting pupil/students and selecting the relevant option from the **Action** button drop-down list:
    - To set one or more memberships to end on a certain date, select **Terminate selected membership(s) on a selected date**.
    - To extend one or more memberships until a certain date, select **Extend selected membership(s) to effective date end**.
    - To extend one or more memberships indefinitely, select **Extend membership(s) forever**.
12. Click the **Save** button to save the user defined group details.

Bulk Updating Membership End Dates

1. **Search** for and select the required group(s) from the **Maintain User Defined Groups** browser.
2. Click the **Bulk Update End Dates** button to display the **Bulk Update Membership End Dates** dialog.



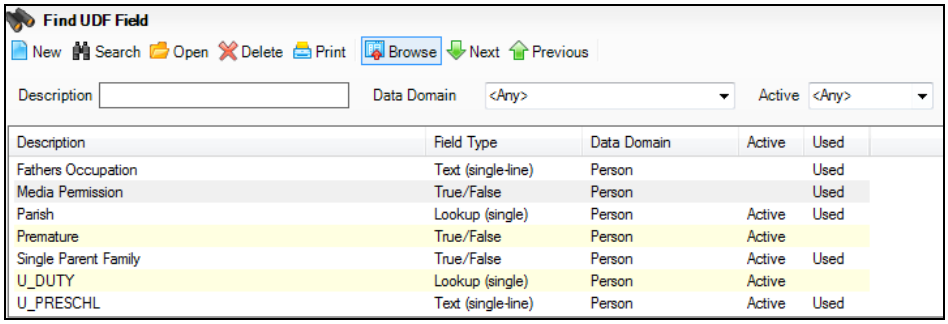
3. The **For all memberships active on** field defaults to today's date, but can be edited by selecting the relevant date from the Calendar.
4. Select the relevant end date from the Calendar adjacent to the **Set end date to** field.
5. Click the **OK** button to return to the **Maintain User Defined Groups** page.

Creating User Defined Fields

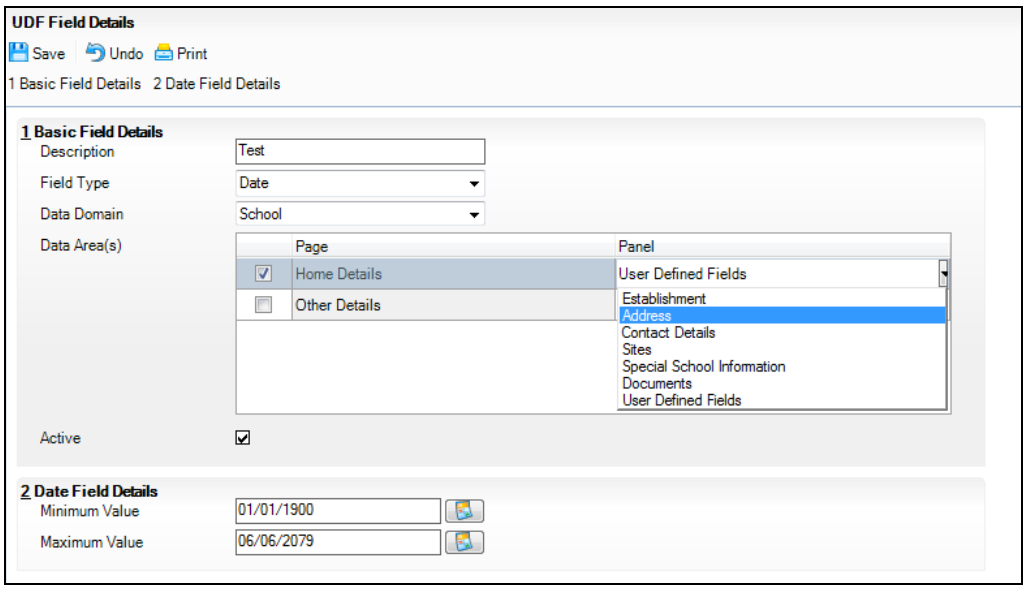
There may be cases where you wish to record new types of information in SIMS, such as pupil/student locker numbers. This is achieved by creating User Defined Fields. Various field types can be created such as data entry fields, drop-down lists, etc.

The location of the field can be specified enabling a field to be added to a specific panel in SIMS. Once created, the fields are also available for reporting when designing reports.

1. Select **Tools | Setups | User Defined Fields** to display the **Find UDF Field** browser.



2. Search for the User Defined Field to ensure that it has not already been created then click the **New** button to display the **UDF Field Details** page.



3. In the **Basic Field Details** panel, enter a **Description** for the new field.
4. Select the **Field Type** from the drop-down list.

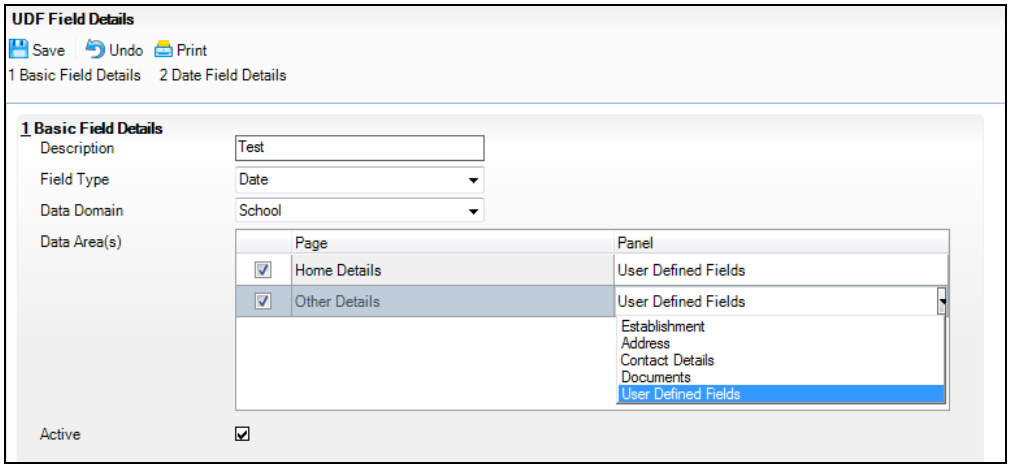
   Depending on the **Field Type** selected, a second panel may be displayed. This panel updates automatically to reflect the relevant details that apply to the chosen **Field Type**.

   For example, selecting the **Text (multi-line)** field type displays **Minimum** and **Maximum Length** fields that allow you to specify the number of characters required.
5. Select the **Data Domain** that the field relates to by selecting the appropriate option from the drop-down list. The **Data Domain** indicates the type of entity that the user defined field relates to.

For example, the new user defined field may relate to the school, an applicant during the admissions process or any other person with a role within the school.

School

If the **School Data Domain** is selected, the new user defined field(s) can be displayed on either or both of the following pages by selecting the check box adjacent to the relevant **Page** name(s). Depending on the **Data Area** selected, the user defined field can be displayed on various different panels.

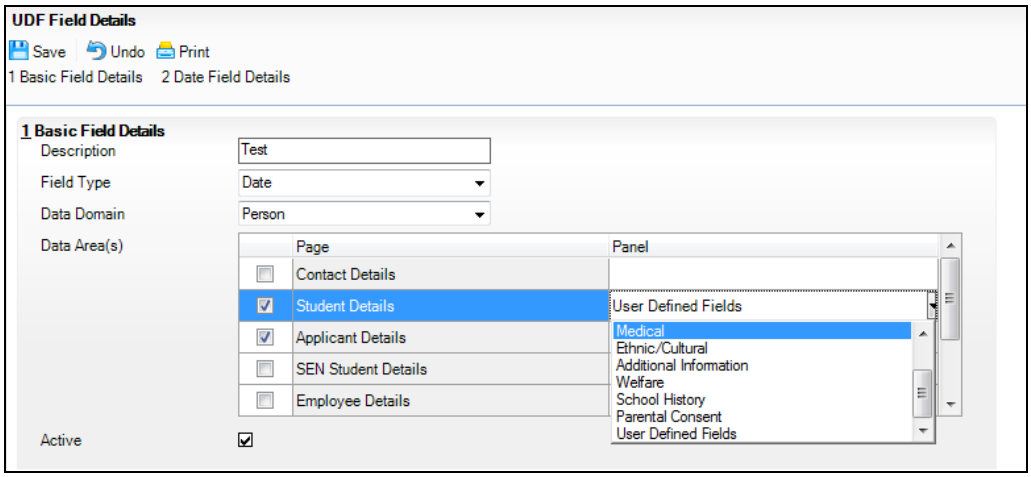


Home Details - Establishment, Address, Contact Details, Sites, Special School Information, Documents or a specific User Defined Fields panel.

Other Details - Establishment, Address, Contact Details, Documents or a specific User Defined Fields panel.

Person

If the **Person Data Domain** is selected, the new user defined field(s) can be displayed on any or all of the following pages by selecting the check box adjacent to the relevant **Page** name(s). Depending on the **Data Area** selected, the user defined field can be displayed on various different panels.



Contact Details - Basic Details, Addresses, Associated Student/Pupils, Telephones and Email Addresses, Language, Job Details, Documents or a specific User Defined Fields panel.

Student Details - Basic Details, Registration, Addresses, Telephone and email addresses, Dietary, Parental Consent, Family/Home, Medical, Ethnic/Cultural, Additional Information, Welfare, School History or a specific User Defined Fields panel.

Applicant Details - Basic Details, Registration Details, Address, Telephone and Email, Dietary, Welfare Details, Parental Consent, Application Status History, Communications, Visits, Family/Home, Medical, Ethnic/Cultural, Additional Information, Welfare, School History or a specific User Defined Fields panel.

SEN Student Details - Linked Adults/ Agencies, Basic SEN Details, Reviews, Events, Statements, Provisions, IEPs, Gifted/Talented, Linked SEN Documents or a specific User Defined Fields panel.

NOTE: Users will only be able to view user defined fields on panels that they already have Permissions to access. For example, some class teachers may not be able to view students' Medical or Welfare information.

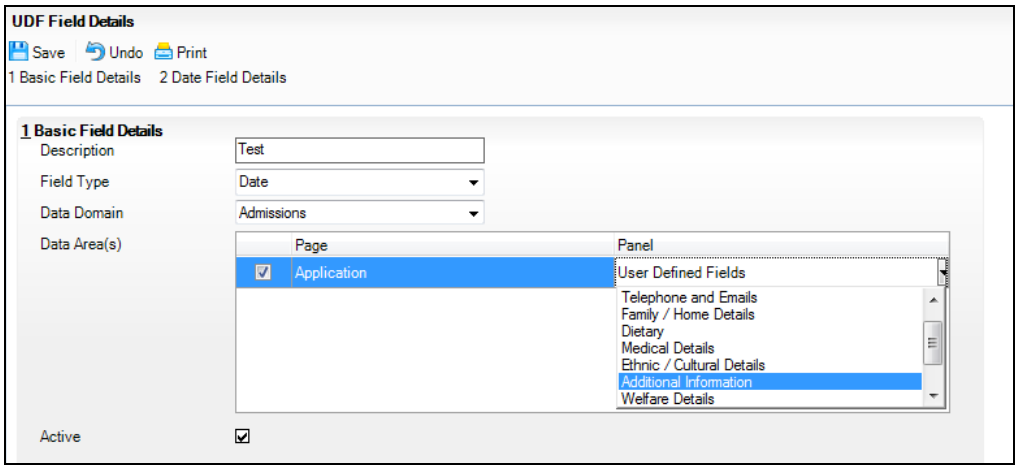
Employee Details - Absences, Addresses, Contact Information, Basic Details, Personal Information, Professional, Next of Kin, Employment Details, Documents or a specific User Defined Fields panel.

Agent Details - Basic Details, Addresses, Telephones and Email Addresses, Agencies, Linked Students, Notes and Documents or a specific User Defined Fields panel.

Prospective Pupil Details - Basic Details, Proposed Registration Details, or User Defined fields panel.

Admissions

If the **Admission Data Domain** is selected, the new user defined field(s) can be displayed on the **Application** page by selecting the check box adjacent to this **Page** name. After selecting the **Application Data Area**, the user defined field can be displayed on various different Panels.



Application - Basic Details, Registration Details, Address, Telephone and Emails, Dietary, Parental Consent, Application Status History, Communication, Visits, Family/Home Details, Medical Details, Ethnic/Cultural Details, Additional Information, Welfare Details, School History or a specific User Defined Fields panel.

NOTE: Users can only view user defined fields on panels that they already have Permissions to access. For example, some class teachers may not be able to view students' Medical or Welfare information.

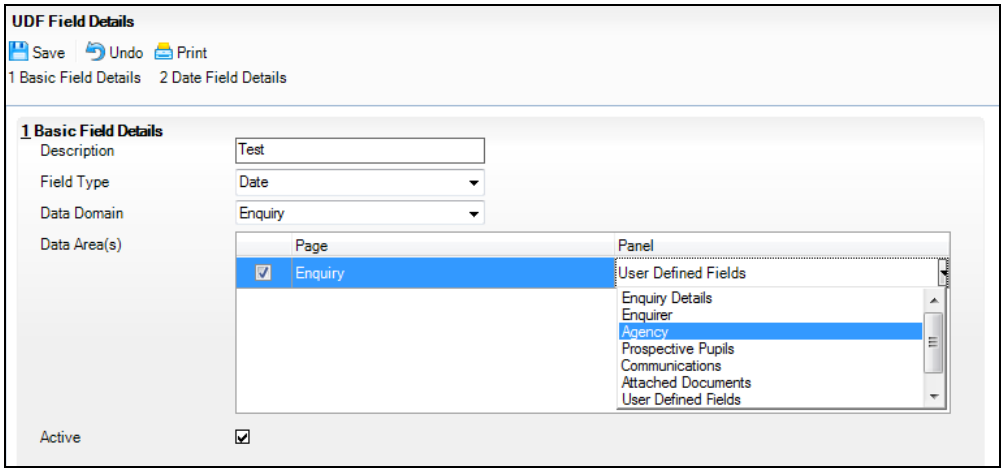
The **Active** check box is selected by default.

1. Complete the lower section of the page in line with the **Field Type** selected.
2. Click the **Save** button to save the details.

*NOTE: Once a User Defined Field has been created and is in use, you will only be able to edit the Minimum/Maximum Lengths and Values specified in the second panel of the **UDF Field Details** page.*

Enquiry

If the **Enquiry Data Domain** is selected, the new user defined field(s) can be displayed on the **Enquiry** page by selecting the check box adjacent to this **Page** name. After selecting the **Enquiry Data Area**, the user defined field can be displayed on various different Panels.



Enquiry - Enquiry Details, Enquirer, Prospective Pupils, Communications, Attached Documents, Agency or a specific User Defined Fields panel.

The **Active** check box is selected by default.

3. Complete the lower section of the page in line with the **Field Type** selected.
4. Click the **Save** button to save the details.

*NOTE: Once a User Defined Field has been created and is in use, you will only be able to edit the Minimum/Maximum Lengths and Values specified in the second panel of the **UDF Field Details** page.*

Deleting User Defined Fields

1. Select **Tools | Setups | User Defined Fields** to display the **Find UDF Field** browser.
2. After searching for an existing user defined field to remove from the database, highlight the required field name and click the **Delete** button.

> *NOTE: User Defined Fields can only be deleted when there are no values attached to them, e.g. where a duplicate user defined field has been created in error.*

Importing and Maintaining Lookups

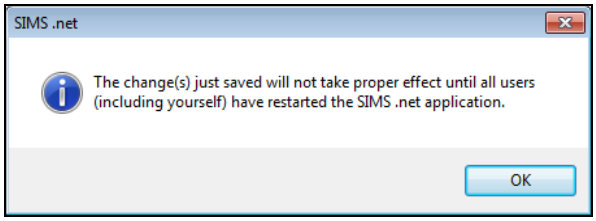
Lookups provide the facility to edit the values displayed in many of the drop-down lists within SIMS. For example, the **Title** lookup contains values such as Mr, Mrs, Ms, Miss, etc. You may wish to add values that do not currently exist, such as Colonel, and/or remove values that you do not think are applicable to your school. It is also possible to edit the order in which the values are displayed to ensure that the most frequently used values within your school, appear at the top of the list.

A lookup consists of a category and a value. For example, **Ethnicity** is a category, whilst **White – British** is a value within that category. The following types of lookup are available:

Standard	Fully editable by users.
Statutory (fixed)	Defined by the DfE, NAW, DENI and cannot be edited.
Statutory with category	Statutory bodies have defined the categories, but users are able to add their own values providing that they are linked to a category so that the value can be interpreted later.
System	Required by SIMS and is not editable.

It may be prudent to check with your Local Authority or Local Support Unit before making any changes as some authorities prefer schools to use a standard set of lookup values to enable data to be consistently recorded within their authority.

> ***IMPORTANT NOTE:*** *Any changes made to lookups will not be visible to users (including yourself) until SIMS has been restarted. The following message is displayed whenever changes are saved:*



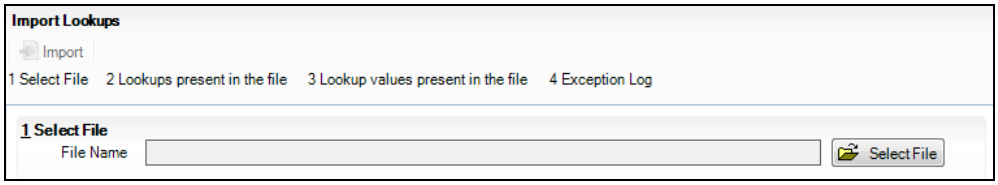
Importing Lookups

There may be occasions when your Local Authority supplies you with a set of lookups that they wish you to use, such as a specific set of language codes for the **First Language** drop-down list. One or more lookups can be supplied in a single file either in `.zip` or `.xml` file format. Once supplied, these lookup files will need to be imported into SIMS.

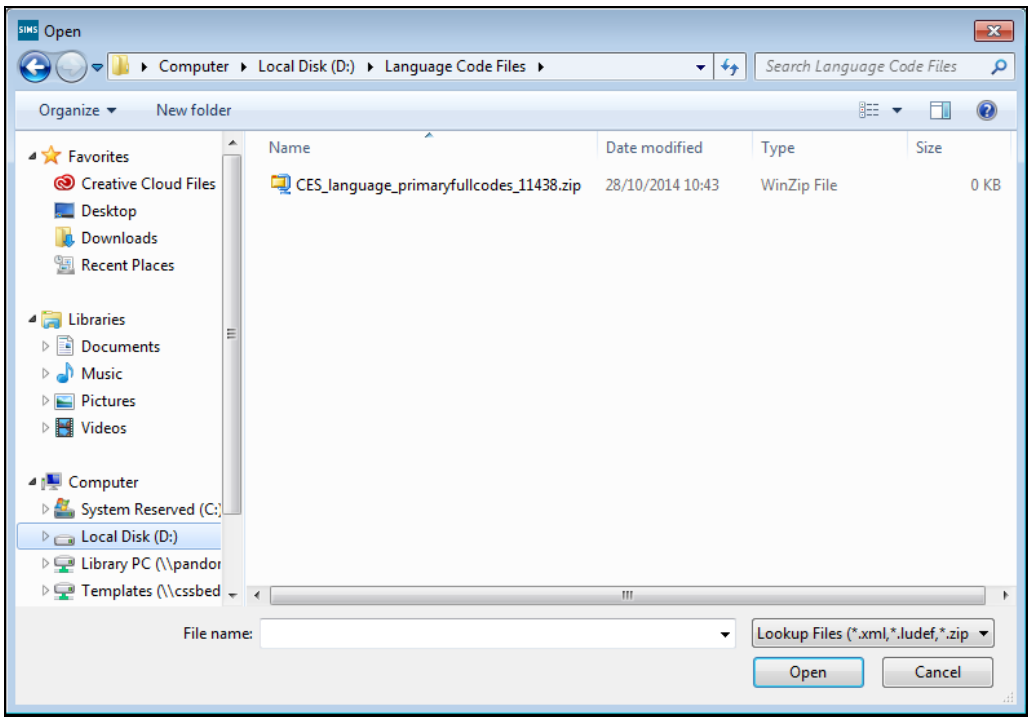
Once the file has been received, ensure that the file is stored in a known location on the PC before proceeding. It is only necessary to unzip a zip file if requested to do so by your Local Support Unit – some zip files can be imported directly into SIMS.

The following example shows how to import a set of language codes.

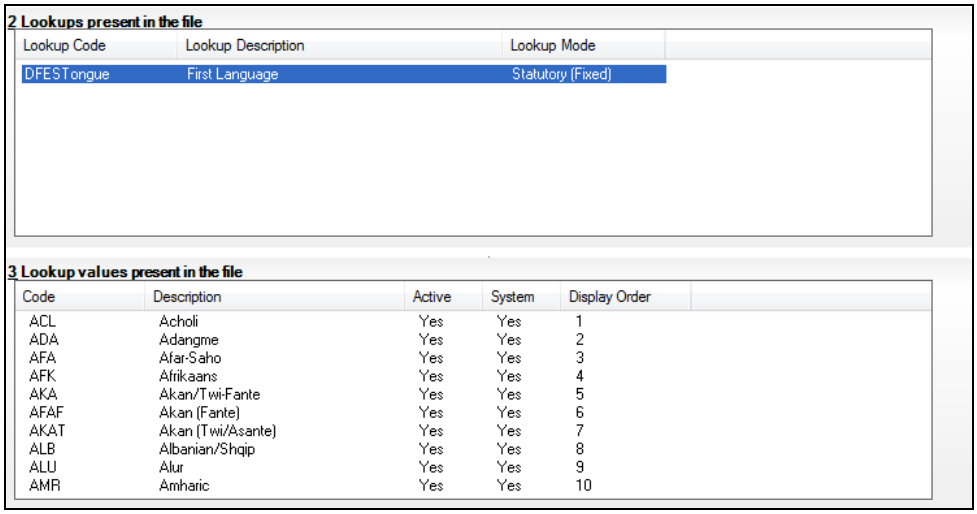
1. Select **Tools | Lookups | Import Lookups** to display the **Import Lookups** page.



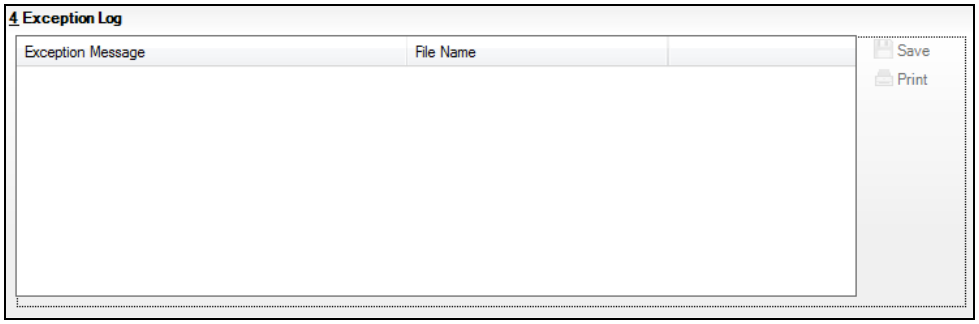
2. Click the **Select File** button to display the **Open** dialog.



3. Navigate to the location in which the lookup code file is stored. Highlight the required file then click the **Open** button. The **Lookups present in the file** and **Lookup values present in the file** panels are populated with the lookups and values included in the file. Clicking on the lookup in the **Lookups present in the file** panel will display the values within the lookup (if only one lookup is included in the file, then the values are displayed automatically).



4. To import the lookups, click the **Import** button on the toolbar. A timer is displayed whilst the import process is carried out.
5. Once complete, any errors are displayed in the **Exception Log** panel.



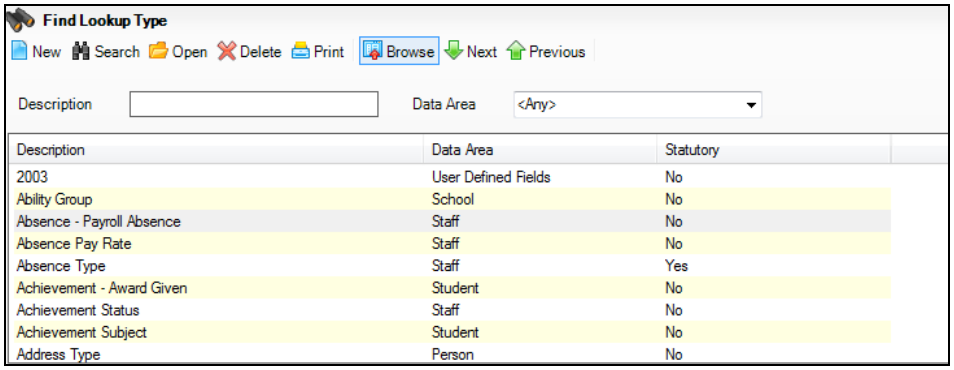
6. Any errors displayed can be saved and/or printed by clicking the appropriate button and the information can be forwarded to your Local Support Unit if required.
7. If this panel is blank, the import process has completed successfully and the lookups are available for use.

> *NOTE: It may be necessary for you to restart SIMS before the lookups are displayed.*

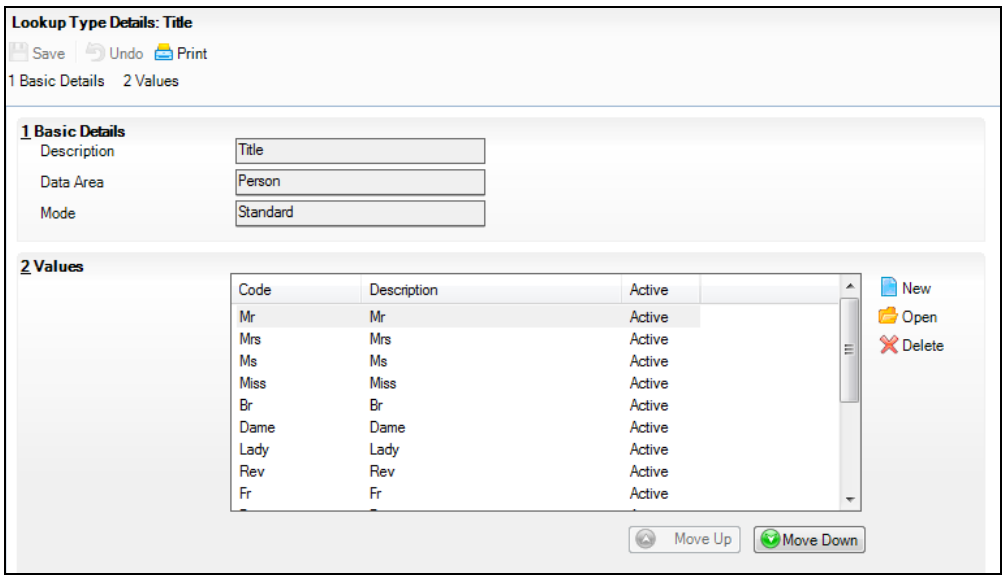
Editing Lookups

1. Select **Tools | Lookups | Maintain** to display the **Find Lookup Type** browser.

   Lookups are separated into the Data Area to which they relate. For example, many lookups are associated with the Student Data Area. The simplest way to search is to select the required Data Area, such as **Person** then click the **Search** button. In this example, the **Title** lookup which can be found in the **Person** Data Area, is being edited.



2. Double-click the required lookup to display the **Lookup Type Details** page.



   The information in the **Basic Details** panel is read-only as these are pre-defined lookups.

Adding New Values to the Lookup

1. Click the **New** button in the **Values** panel to open the **Add/Edit Lookup Value** dialog.

2. Enter a code for the lookup value (maximum of 10 characters), e.g. `Col`.
3. Enter a concise description (maximum 32 characters). This is the text that is displayed in the drop-down list.
4. Ensure that the **Active** check box is selected which determines whether the lookup value is displayed in the drop-down list.
5. Click the **OK** button to add the value to the lookup.
6. Repeat for any other required lookup values.
7. Click the **Save** button on the toolbar to save the added lookup values noting that the changes will not be visible until SIMS is restarted.

Editing Existing Lookup Values

Changing existing lookup values will change the value that is displayed in the applicable drop-down list, together with all values stored in SIMS records. For example, if you wish to change the value of **Colonel** to **Col**, any records that contain **Colonel** in the **Title** field are replaced with **Col**.

1. Highlight the value to be edited in the **Values** panel then click the **Open** button to open the **Add/Edit Lookup Value** dialog.
2. Edit the **Code** or **Description** as required.

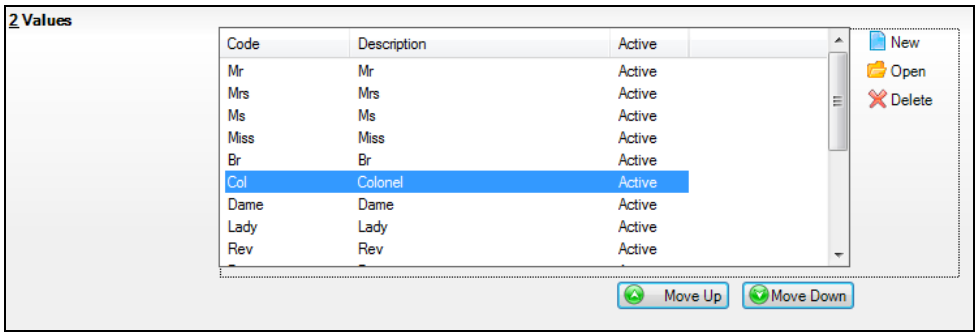
> *NOTE: A code that has a **(1)** at the end of the description indicates a duplicate description which has a different code. It is advisable to decide which of the two description/code combinations are required, then make the unwanted value inactive (please see* Activating/De-activating Lookup Values *on page* 156*).*

3. Click on the **OK** button to confirm the changes.
4. Click the **Save** button on the toolbar to save noting that the changes will not be visible until SIMS is restarted.

Changing the Display Order of the Lookup Values

You can determine the order in which the values are displayed in their drop-down lists.

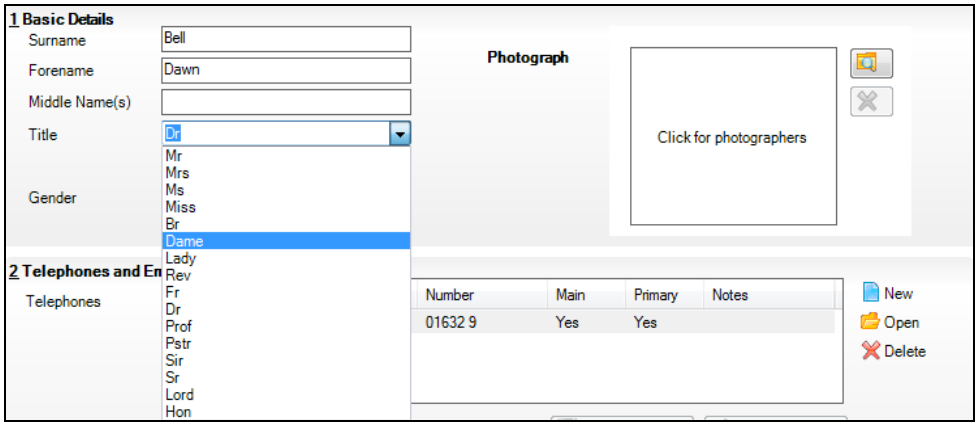
1. In the **Values** panel, highlight the value to be moved then click the **Move Up** or **Move Down** buttons until the desired location is achieved.



2. Click the **Save** button on the toolbar to save noting that the changes will not be visible until SIMS is restarted.

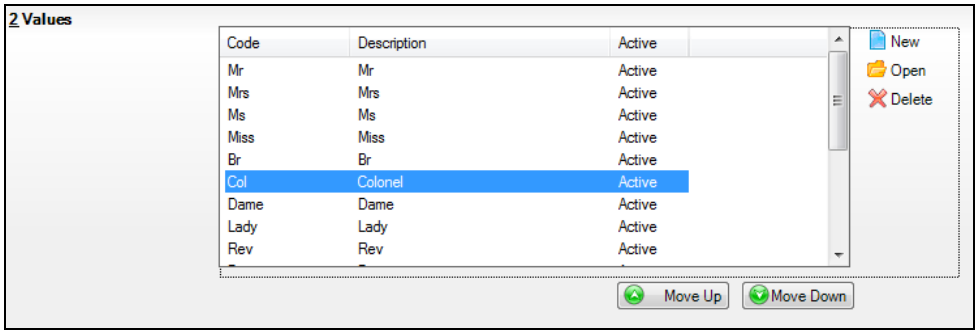
Activating / De-activating Lookup Values

It is possible to deactivate lookup values in order to prevent them from displaying in the drop-down list. Any records that used to contain the deactivated value will not show that value. As a result, the deactivated value will not be available for selection in any new records. For example, deactivating **Colonel** will mean that any existing records will not show **Colonel**, and this value will no longer be available from the **Title** drop-down list in any new records.

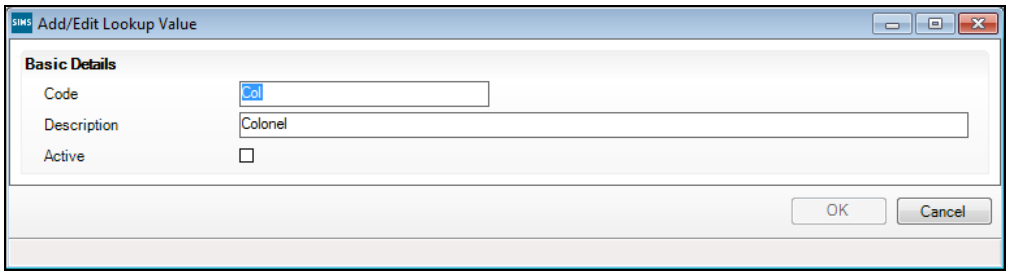


You can amend any deactivated values if required, using the bulk update functionality.

1. Highlight the value to be edited in the **Values** panel then click the **Open** button to open the **Add/Edit Lookup Value** dialog.



2. De-select the **Active** check box to de-activate the value. The value can be activated at a later stage by selecting the **Active** check box.



3. Click the **OK** button to confirm the changes.
4. Click the **Save** button on the toolbar noting that the changes will not be visible until SIMS is restarted.

Deleting Values from the Lookup

It is advisable to delete only values that you are sure are no longer required and will not be needed in the future. It is not possible to delete any statutory lookup values, any values required by SIMS, or any values that have been used in stored records. A message is displayed if you are not permitted to delete a specific lookup. Lookups that have been previously used, and are no longer required, should be deactivated as described in the previous section.

1. Highlight the value to be deleted in the **Values** panel then click the **Delete** button. An error message is displayed if the value has been used and therefore cannot be deleted.
2. Click the **OK** button to confirm the deletion.
3. Click the **Save** button on the toolbar to save the deletion noting that the changes will not be visible until SIMS is restarted.

Configuring Ethnic Codes

A pre-defined list of Ethnic Codes is supplied by your LA. Providing this list ensures that all schools in the LA's area use the same codes that are relevant for your typical student intake. The ethnic codes are compiled by the LA into a text file (.txt) to ensure ease of importing.

1. Select **Tools | Lookups | Configure Ethnic Codes** to display the **Configuration of Ethnic Codes** page.
2. Click the **Open** button adjacent to the **Select file to import** field to display the **Select text file to import** dialog.
3. Navigate to the location of the stored `Ethnic.txt` file supplied by your LA and click the **Open** button to attach the correct text file.

4. Click the **Configure** button to import the ethnic codes specified in the text file.

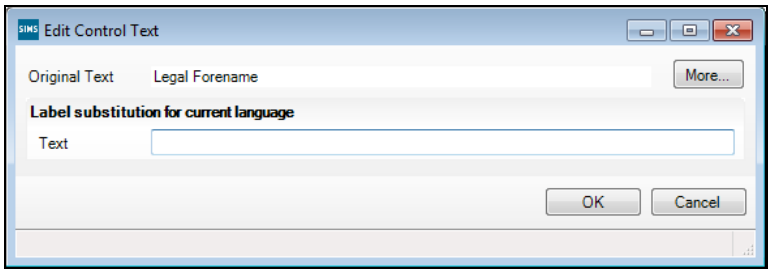
Customising the SIMS Screen

The language used in SIMS can be selected as English or Welsh. In addition, menu routes and screen labels can be changed to meet your requirements.

> *NOTE: All user documentation refers to default menu routes and screen labels.*

Changing Screen Labels

1. Individual field or panel labels can be edited by right-clicking on the field/panel name and selecting **Customise Text** to display the **Edit Control Text** dialog.



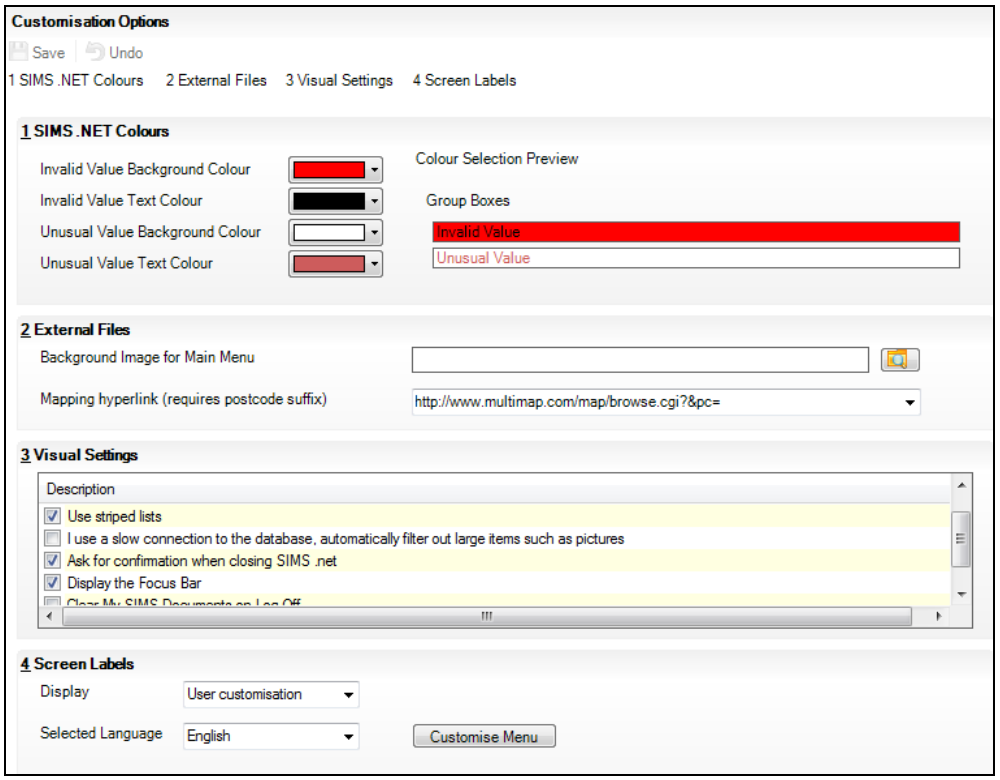
2. Enter the new label in the **Text** field then click the **OK** button.

Customising SIMS Colours

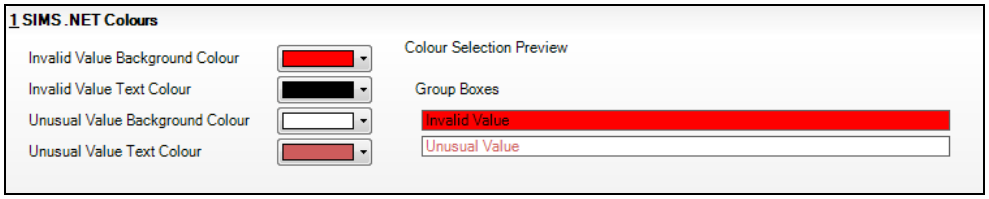
The language used in SIMS can be selected as English or Welsh and the menu routes can be relabelled to something more appropriate, if required.

Individual field names can be edited from the appropriate focus. To do this, right click a field name anywhere in SIMS and enter the preferred label.

1. Select **Tools | Setups | User Options** to display the **Customisation Options** page.



2. The colours for various areas of the desktop can be changed according to your requirements. Colours can be selected for the following:
   - **Invalid Value Background Colour** - Set by default to red, this is the colour displayed when invalid information has been entered into a field or when a mandatory field has not been completed.
   - **Invalid Value Text Colour** - Set to black by default.
   - **Unusual Value Background Colour** - Set by default to white.
   - **Unusual Value Text Colour** - Set by default to Indian red.



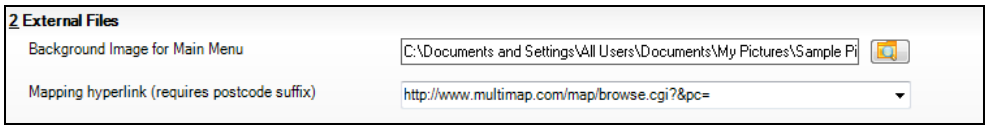
Changing a Default Colour

Double-click the colour in the field that you want to change. Select the colour of your choice from the **Choose a Colour** dialog and click the **Save** button.

Specifying External Files

It is possible for schools to display their own school logo instead of the SIMS default logo provided.

1. Click the **Browser** button adjacent to the **Background Image for Main Menu** field to display the **SIMS.net Background Image** dialog.
2. Navigate to the location of your stored school logo image and click the **Open** button to attach the chosen image.



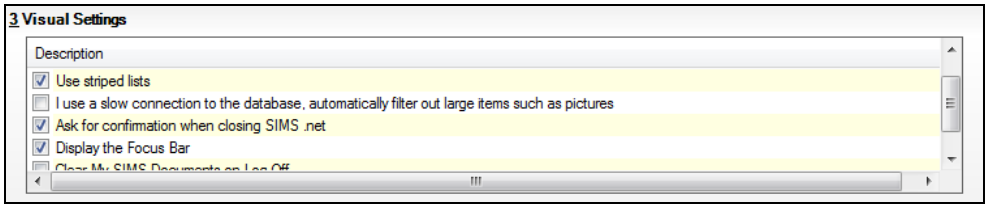
*NOTE: The logo of your choice will not be visible until you have clicked the **Save** button. The logo will only be displayed when the **Home Page** has been closed and re-opened.*

The **Mapping Hyperlink (requires postcode suffix)** enables you to specify an http address for a post code locating website. A number of options have been provided.

3. Select the preferred http address from the drop-down list.
4. Click the **Save** button.

Specifying Visual Settings

The following options are available to be amended in the **Visual Settings** panel.



- **Use striped lists** - This check box is de-selected by default. Select the check box to produce colour striped lists where applicable.
- **I use a slow connection to the database, automatically filter out large items such as pictures** - Allowing large items to be filtered out minimises the impact on the performance of your machine.
- **Ask for confirmation when closing SIMS** - If you select this check box, the system asks for confirmation that you wish to shut down the application before it automatically shuts down.

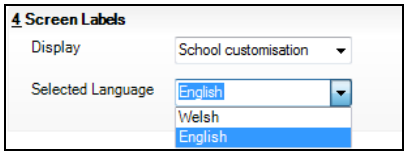
- **Display the Focus Bar** - If this check box is selected, the **Links** panel and the **Help** panel on the right-hand side of the screen are not displayed. However, the page width does not automatically expand to fill the space left by these two panels, if this option is selected.
- **Clear My SIMS Documents on Log Off** - If this check box is selected, any documents that have been opened and saved to your hard drive, are removed from the `C:\Documents and Settings\username\My Documents\My SIMS Documents` folder on logging off.

Specifying the Language and Screen Labels

1. In the **Screen Labels** panel, select the required **Display** type from the drop-down list.

Selecting **SIMS default** leaves all screen labels as they are currently displayed. Selecting **School customisation** enables you to dictate how all of your users will view the screen labels and selecting **User customisation** enables individual users to specify how their own desktop configuration is displayed.

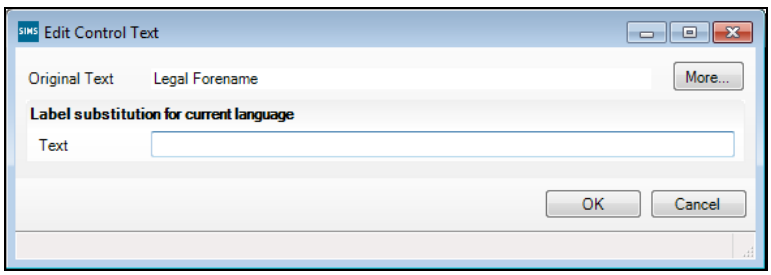
2. Select the **Selected Language** from the drop-down list.



Selecting **Welsh** as your Language option only takes effect if you are registered as a Welsh school.

> *NOTE: For the changes to take effect, you must save the changes, log out and then back in to SIMS.*

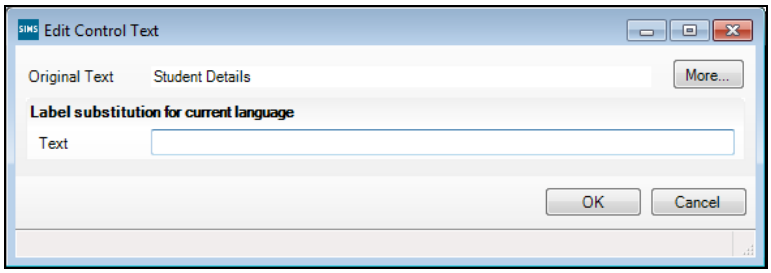
3. To edit the name of a menu route in SIMS, click the **Customise Menu** button to display the **Edit Menu Text** dialog.



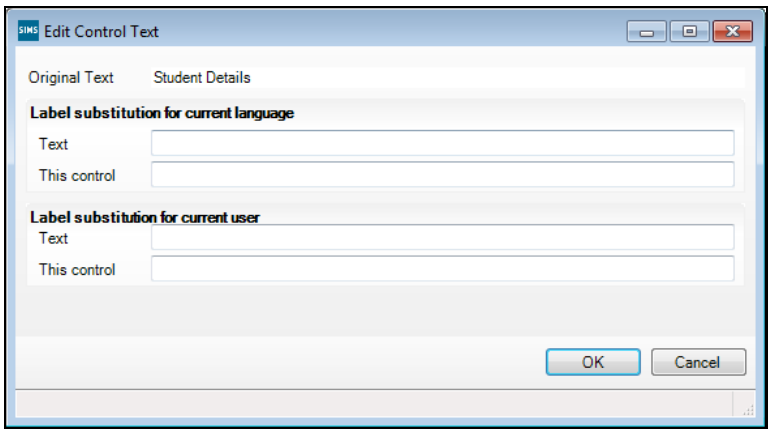
This option can be used to edit the name of any menu route in SIMS to suit the requirements of your establishment. For example, if you prefer to refer to **Pupils** rather than **Students**, you may wish to change any references in the menu routes as well.

4. Highlighting one of the **Menu Routes** displayed in the dialog, enables you to rename the specified menu route to a label of your choice.

   For example, clicking on **Focus | Student | Student Details** displays an **Edit Control Text** dialog. The **Original Text** is displayed at the top of the dialog indicating that you are changing the Student Details text.



5. In the **Label Substitution for Current language Text** panel, enter your substitute label name in the **Text** field and click the **More** button to display additional fields that enable **Label substitution for current user**.

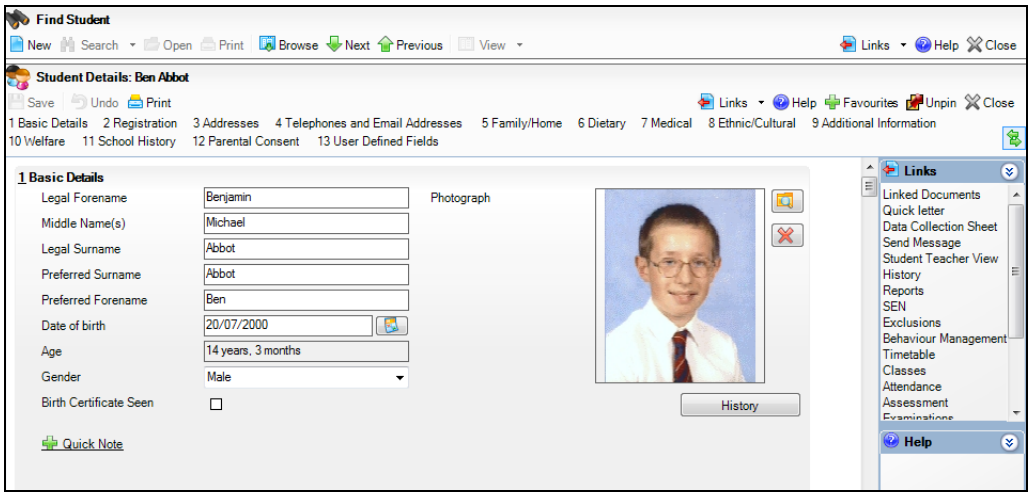


6. Enter the chosen **Text**, specify **This control** and click the **OK** button to save the changes. The **This Control** field enables you to decide whether or not you want your text substitution to apply to all areas where the text is displayed.

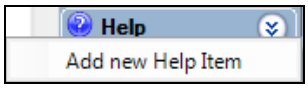
Adding Additional Help in SIMS

LAs and schools can attach their own help topics, web links, training materials and videos, to assist users with various areas or routines where more regional information is required.

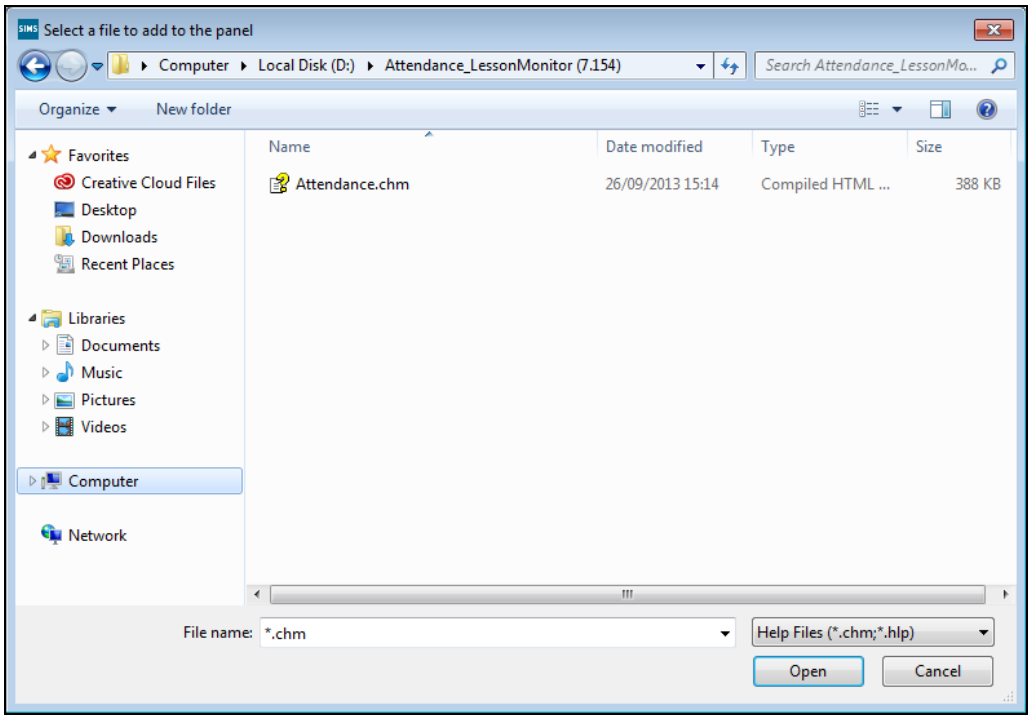
On the right-hand side of most of the pages within SIMS, there is now a **Links** panel and a **Help** panel.



1. In the **Help** panel, right-click the **Help** icon to display an action bar entitled **Add new Help Item**.

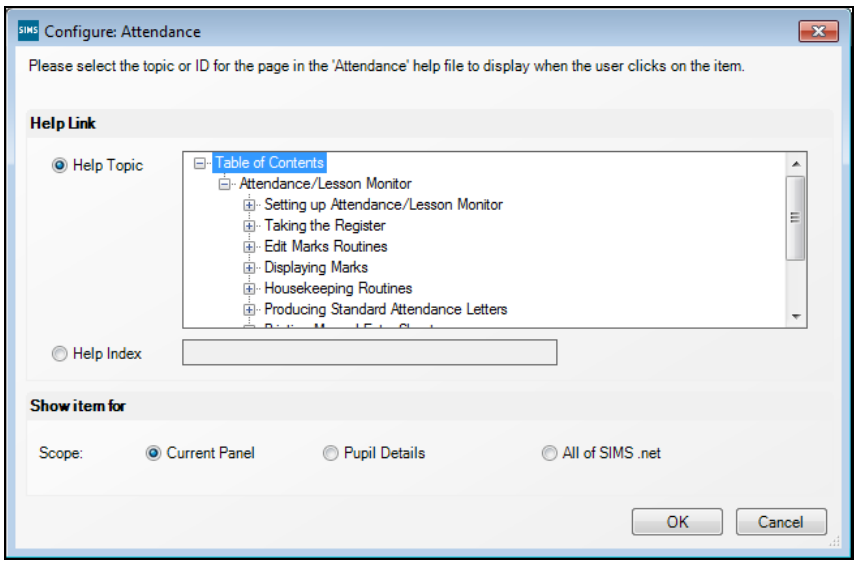


2. Click the action bar to display the **Select a file to add to the panel** dialog.



The Files of type: defaults to Help Files (`*.chm`, `*.hlp`).

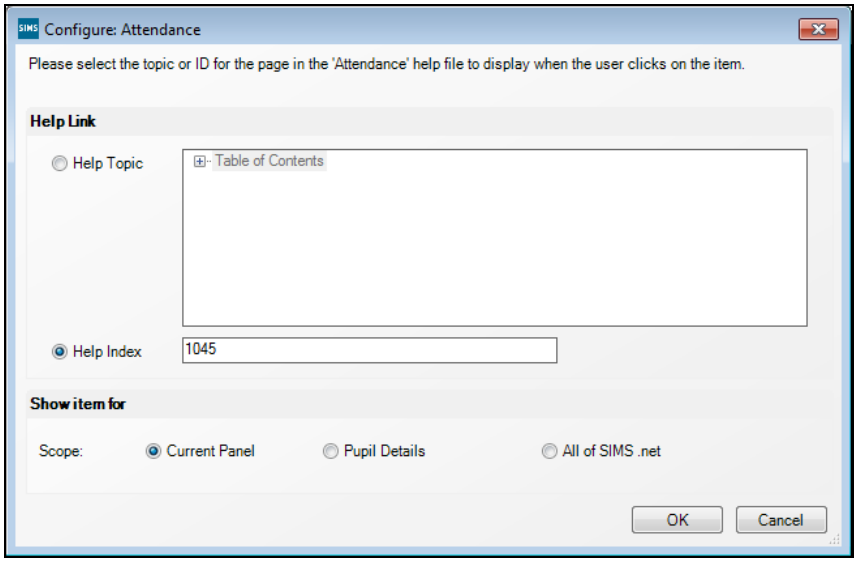
3. Navigate to the location of a stored help file. Highlight the relevant file and click the **Open** button to display the **Configure:** dialog.



NOTE: The relevant file must have been placed in the same directory as the `Pulsar.exe`.

There are two ways to attach the help file to the selected area:

- **Help Topic** - Clicking the **Help Topic** radio button displays the Table of Contents (TOC) contained within the help file. Expand the TOC until you locate the required help topic. Double-click the topic to select it.
- **Help Index** - Select the **Help Index** radio button and enter the map id of the required help topic.

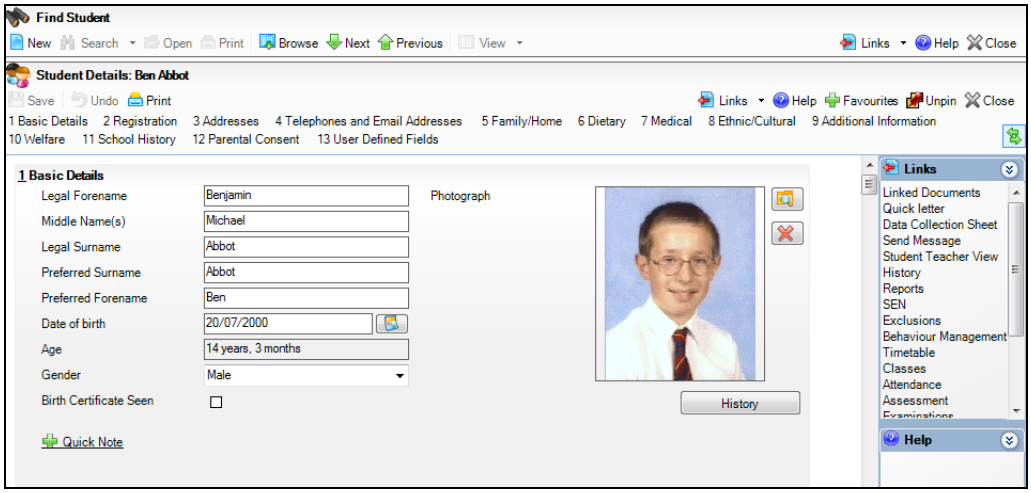


4. In the **Show item for** panel at the bottom of the **Configure:** dialog, select the required **Scope:** for the help topic. This indicates whether the help topic is available when viewing a specific named panel, the whole of the current page or all of SIMS.
5. Click the **OK** button on the **Configure:** dialog.
6. After attaching the required help topic by either of these methods, right-click the new help entry and select **Edit** to display the **Edit a Dynamic Help Item** dialog. Change the **Description** to something meaningful and click the **OK** button to save the details.

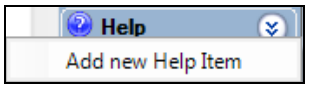
Attaching Bespoke PDF Files

The facility to attach Help and PDF files that have not been supplied by Capita Children's Services is now available. LAs and schools can now attach their own documents, web links, training materials and videos, to assist users with various areas or routines where more regional information is required.

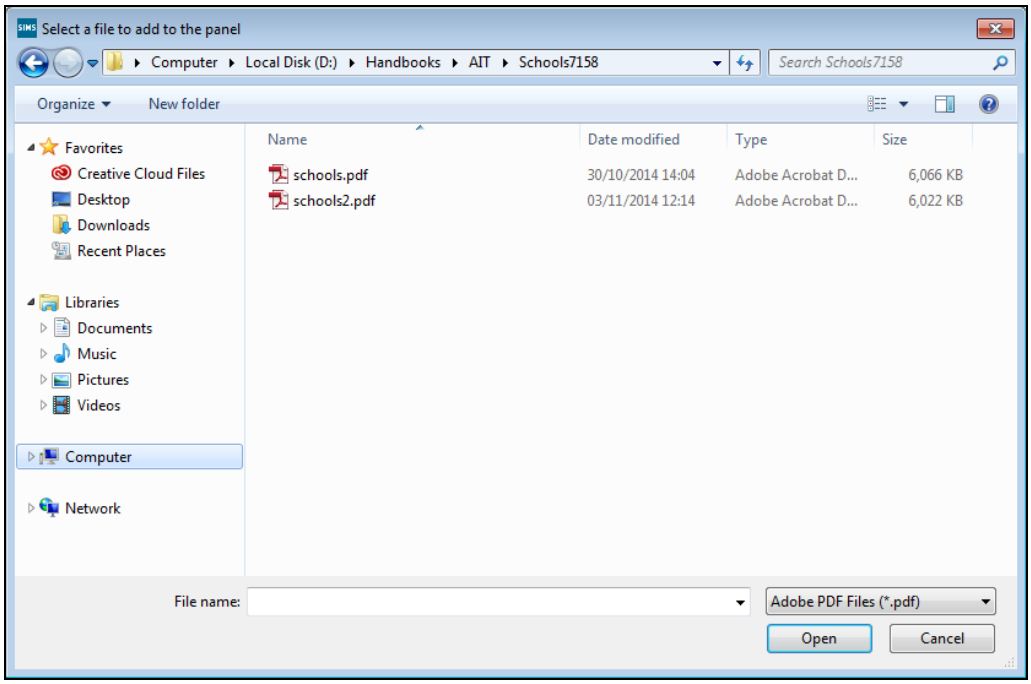
On the right-hand side of most of the pages within SIMS, there is a **Links** panel and a **Help** panel.



1. In the **Help** panel, right-click the **Help** icon to display an action bar entitled **Add a New Item**.



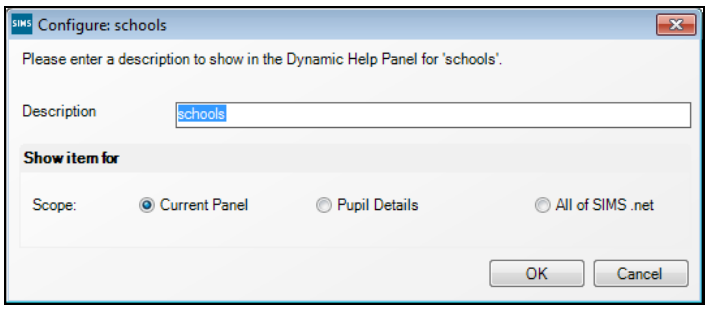
2. Click the action bar to display the **Select a file to add to the panel** dialog.



3. Change the files of type to **Adobe PDF Files (*.pdf)** and navigate to the location of the required document.
4. Highlight the relevant `.pdf` file and click the **Open** button to attach the file.

A warning message is displayed advising that the selected .pdf file should be copied to the SIMS folder to ensure that all users can access the link.

5. Click the **OK** button to display the **Configure:** dialog.



6. Enter a **Description** for the selected .pdf file.
7. In the **Show item for panel** at the bottom of the **Configure:** dialog, select the required **Scope:** for the .pdf file. This indicates whether the .pdf file is attached to a specific panel, the whole of the current page or all of SIMS.
8. Click the **OK** button to attach the .pdf file.

   After attaching the required .pdf file, right-click the new entry and select **Edit** to display the **Edit a Dynamic Help Item** dialog. Change the **Description** to something meaningful and click the **OK** button to save the details.

10| Importing and Recording Pupil Premium Information

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Importing Pupil Premium Information

Pupil Premium files can be downloaded from the Key To Success website.

1. Select **Tools | Pupil Premium | Import** to display the **Import Pupil Premium** page.
2. In the **Premium Type** panel, select the check box of the premium type(s) you wish to import.
3. In the **Premium Type to update Pupil Premium Indicator** panel, select the check box of the premium type(s) you wish to use to update the pupil premium indicator.
4. Click the **Browse** button adjacent to the **Choose File** field to display the **Open** dialog.
5. Search for and highlight the required import file then click the **Open** button to return to the **Import Pupil Premium** page.
6. Click the **Yes** button to confirm that this is the correct file.
7. Click the **Import** button. Any errors are displayed in the **Exception log** panel.
8. Click the **Save** button to save the import.

Recording Pupil Premium Information

It is possible to add and edit Pupil Premium records manually.

1. Select **Tools | Pupil Premium | Maintain** to display the **Maintain Pupil Premium** page.
2. In the **Premium Type to update Pupil Premium Indicator** panel, select the check box of the premium type(s) you wish to use to update the pupil premium indicator.
3. Use the **Search** fields to enter or select the required search criteria.
4. Click the **Search** button to display all the pupil/students who match the search criteria entered.
5. To create a new Pupil Premium record, click the **Add** button to display the **Add Pupil Premium** dialog.
   a. Use the **Search** fields to enter or select the required search criteria.
   b. Click the **Search** button to display all the pupil/students who match the search criteria entered.

c. Highlight the required pupil/student then click the **OK** button to return to the **Maintain Pupil Premium** page.

6. Edit the details, if required.
7. Click the **Save** button to save the changes. If you have selected any of the check boxes in the **Premium Type to update Pupil Premium Indicator** panel, you will be asked to confirm the update of the pupil premium indicator on the pupil/student record. It is not possible to save the changes without updating the pupil premium indicator on the pupil/student record.
8. Click the **Report** button to run the Pupil Premium report.

Running the Pupil Premium Report

1. On the **Maintain Pupil Premium** page, click the **Report** button to display the **Print Pupil Premium** dialog.
2. Select the **Destination Folder** by clicking the adjacent **Browser** button.
3. Navigate to the required location for the report output.
4. Click the **OK** button to return to the **Print Pupil Premium** dialog.
5. Click the **Report** button to produce the report. The report is displayed in your web browser, from where it can be printed.
6. Click the **Close** button to return to the **Maintain Pupil Premium** page.

11 | Housekeeping Routines

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Introduction

These routines enable users to tidy their existing data and make decisions about how their data is displayed globally throughout SIMS.

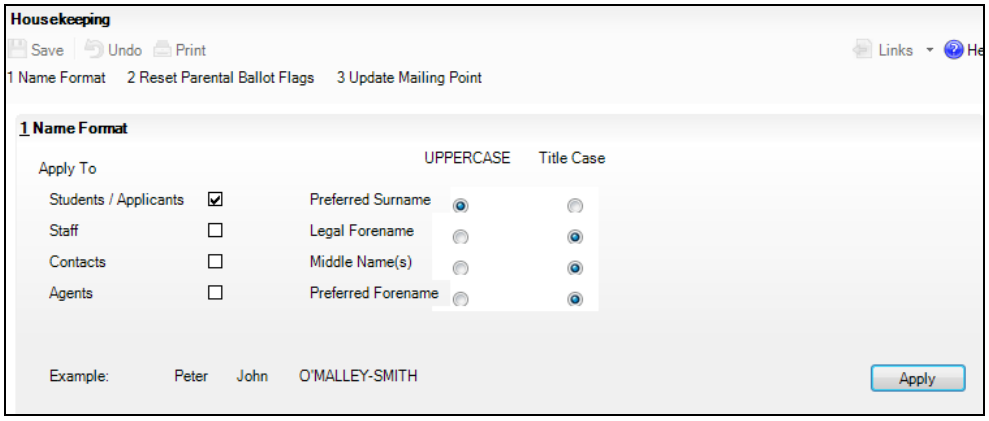
Running the Name Format Tidy

This housekeeping routine has been provided to enable School Administrators and Administration Assistants to 'tidy' the names of individuals entered in SIMS so that they are all displayed in a uniform way.

Changes can be applied to a combination of students/applicants, staff, agents and contacts or to everyone, as required. The actual case changes can be made to either upper case or title case depending on the selection made.

1. Select **Tools | Housekeeping | General** to display the **Housekeeping** page.
2. In the **Name Format** panel, select the relevant check box next to the type of individual to whom the changes will **Apply To**.

3. Select either the **UPPERCASE** or **Title Case** radio buttons next to the appropriate part of the name that you wish to change.



Any changes that you make are reflected below in the **Example** enabling you to preview how the new selection looks before applying it.

4. Click the **Apply** button to update the selected name formats.
5. Click the **Save** button to keep the changes.

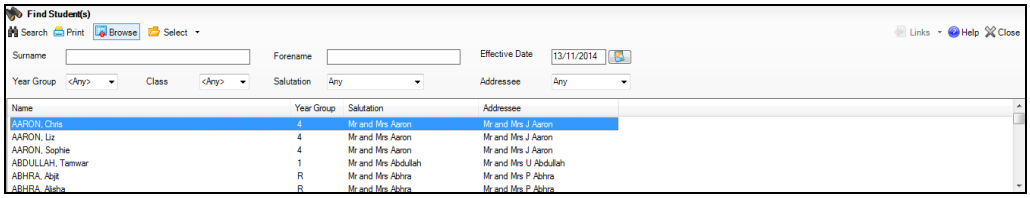
Updating Salutation/Addressee Information in Bulk

To ensure that parental and contact salutation/addressee information is recorded for all pupil/students and contacts, two housekeeping routines facilitate the entry of this information:

- The Generate Parental Salutation and Parental Addressee Information routine enables the **Parental Salutation** and **Parental Addressee** fields on pupil/student records to be generated and updated in bulk (please see *Updating Parental Salutation/Addressee Information in Bulk* on page *172*).
- The Generate Contact Salutation and Contact Addressee Information routine enables the **Salutation** and **Addressee** fields on contact records to be generated and updated in bulk (please see *Updating Contact Salutation/Addressee Information in Bulk* on page *174*).

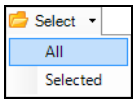
Updating Parental Salutation/Addressee Information in Bulk

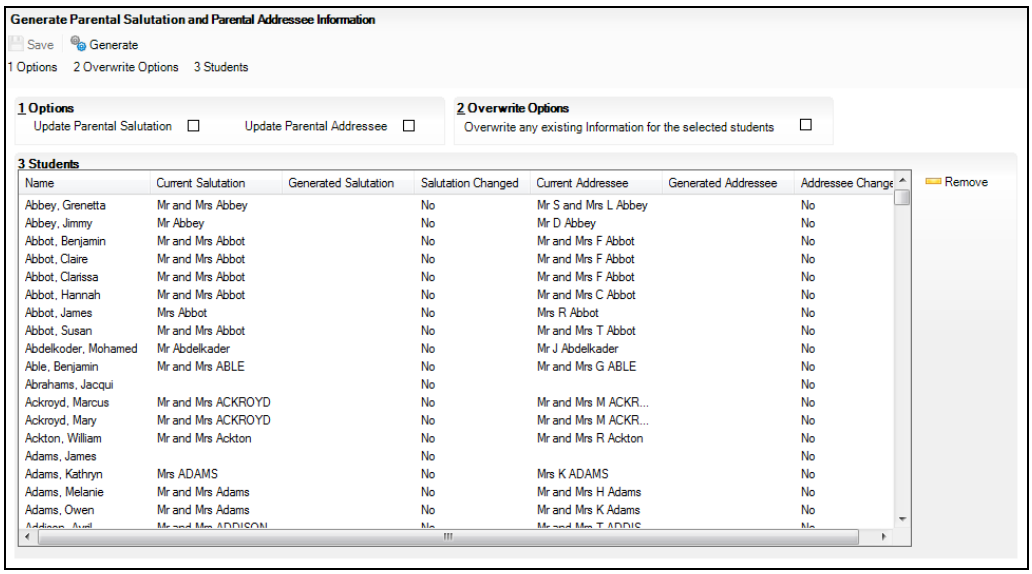
1. Select **Routines | Pupil** (or **Student**) **| Update Salutation/Addressee | Parental** to display the **Find Student(s)** browser.



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

4. Click the **Search** button to display all pupil/students who match the search criteria specified.
5. Click the **Print** button to print the details currently displayed in the **Find Student(s)** browser.
6. Highlight the required pupil/student (multiple pupil/students can be selected by holding down either the **Shift** or **Ctrl** keys and clicking the required names) then click the **Select** button to display their names in the **Generate Parental Salutation and Parental Addressee Information** panel. Alternatively, to display all pupil/students currently displayed in the browser, choose **All** from the **Select** drop-down menu.





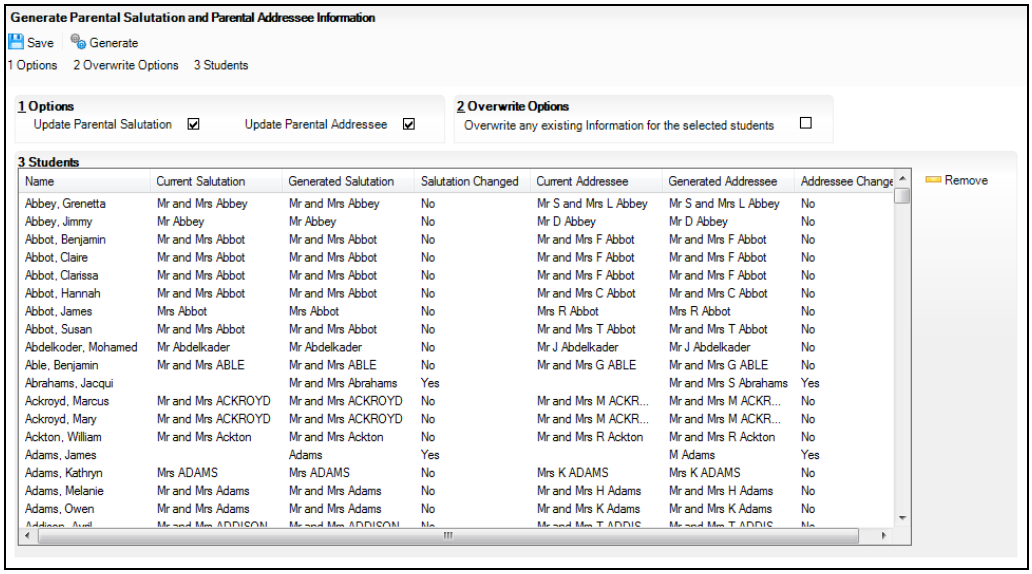
Name	Current Salutation	Generated Salutation	Salutation Changed	Current Addressee	Generated Addressee	Addressee Change
Abbey, Grenetta	Mr and Mrs Abbey		No	Mr S and Mrs L Abbey		No
Abbey, Jimmy	Mr Abbey		No	Mr D Abbey		No
Abbot, Benjamin	Mr and Mrs Abbot		No	Mr and Mrs F Abbot		No
Abbot, Claire	Mr and Mrs Abbot		No	Mr and Mrs F Abbot		No
Abbot, Clarissa	Mr and Mrs Abbot		No	Mr and Mrs F Abbot		No
Abbot, Hannah	Mr and Mrs Abbot		No	Mr and Mrs C Abbot		No
Abbot, James	Mrs Abbot		No	Mrs R Abbot		No
Abbot, Susan	Mr and Mrs Abbot		No	Mr and Mrs T Abbot		No
Abdelkoder, Mohamed	Mr Abdelkader		No	Mr J Abdelkader		No
Able, Benjamin	Mr and Mrs ABLE		No	Mr and Mrs G ABLE		No
Abrahams, Jacqui			No			No
Ackroyd, Marcus	Mr and Mrs ACKROYD		No	Mr and Mrs M ACKR...		No
Ackroyd, Mary	Mr and Mrs ACKROYD		No	Mr and Mrs M ACKR...		No
Ackton, William	Mr and Mrs Ackton		No	Mr and Mrs R Ackton		No
Adams, James			No			No
Adams, Kathryn	Mrs ADAMS		No	Mrs K ADAMS		No
Adams, Melanie	Mr and Mrs Adams		No	Mr and Mrs H Adams		No
Adams, Owen	Mr and Mrs Adams		No	Mr and Mrs K Adams		No

The **Students** panel displays the currently selected pupil/students, along with their **Current Salutation** and **Current Addressee** information, if recorded.

7. If you have inadvertently selected a pupil/student who you do not wish to update, highlight their name and click the **Remove** button.
8. To **Update Parental Salutation** and/or **Update Parental Addressee** information for the selected pupil/students, select the respective check boxes.
9. If required, select the check box to **Overwrite any existing Information for the selected students**.

> ***IMPORTANT NOTE:*** *If this check box is selected, any pupil/student records with existing parental salutation and/or addressee information will be overwritten with the default values, as determined by SIMS. If parental salutation and/or addressee information is not currently recorded for a number of student records, and you wish to update only the records where this information is missing, deselect the check box.*

10. Click the **Generate** button. A preview of the changes to be made is displayed the **Students** panel.



Name	Current Salutation	Generated Salutation	Salutation Changed	Current Addressee	Generated Addressee	Addressee Change
Abbey, Grenetta	Mr and Mrs Abbey	Mr and Mrs Abbey	No	Mr S and Mrs L Abbey	Mr S and Mrs L Abbey	No
Abbey, Jimmy	Mr Abbey	Mr Abbey	No	Mr D Abbey	Mr D Abbey	No
Abbot, Benjamin	Mr and Mrs Abbot	Mr and Mrs Abbot	No	Mr and Mrs F Abbot	Mr and Mrs F Abbot	No
Abbot, Claire	Mr and Mrs Abbot	Mr and Mrs Abbot	No	Mr and Mrs F Abbot	Mr and Mrs F Abbot	No
Abbot, Clarissa	Mr and Mrs Abbot	Mr and Mrs Abbot	No	Mr and Mrs F Abbot	Mr and Mrs F Abbot	No
Abbot, Hannah	Mr and Mrs Abbot	Mr and Mrs Abbot	No	Mr and Mrs C Abbot	Mr and Mrs C Abbot	No
Abbot, James	Mrs Abbot	Mrs Abbot	No	Mrs R Abbot	Mrs R Abbot	No
Abbot, Susan	Mr and Mrs Abbot	Mr and Mrs Abbot	No	Mr and Mrs T Abbot	Mr and Mrs T Abbot	No
Abdelkoder, Mohamed	Mr Abdelkader	Mr Abdelkader	No	Mr J Abdelkader	Mr J Abdelkader	No
Able, Benjamin	Mr and Mrs ABLE	Mr and Mrs ABLE	No	Mr and Mrs G ABLE	Mr and Mrs G ABLE	No
Abrahams, Jacqui		Mr and Mrs Abrahams	Yes		Mr and Mrs S Abrahams	Yes
Ackroyd, Marcus	Mr and Mrs ACKROYD	Mr and Mrs ACKROYD	No	Mr and Mrs M ACKR...	Mr and Mrs M ACKR...	No
Ackroyd, Mary	Mr and Mrs ACKROYD	Mr and Mrs ACKROYD	No	Mr and Mrs M ACKR...	Mr and Mrs M ACKR...	No
Ackton, William	Mr and Mrs Ackton	Mr and Mrs Ackton	No	Mr and Mrs R Ackton	Mr and Mrs R Ackton	No
Adams, James		Adams	Yes		M Adams	Yes
Adams, Kathryn	Mrs ADAMS	Mrs ADAMS	No	Mrs K ADAMS	Mrs K ADAMS	No
Adams, Melanie	Mr and Mrs Adams	Mr and Mrs Adams	No	Mr and Mrs H Adams	Mr and Mrs H Adams	No
Adams, Owen	Mr and Mrs Adams	Mr and Mrs Adams	No	Mr and Mrs K Adams	Mr and Mrs K Adams	No

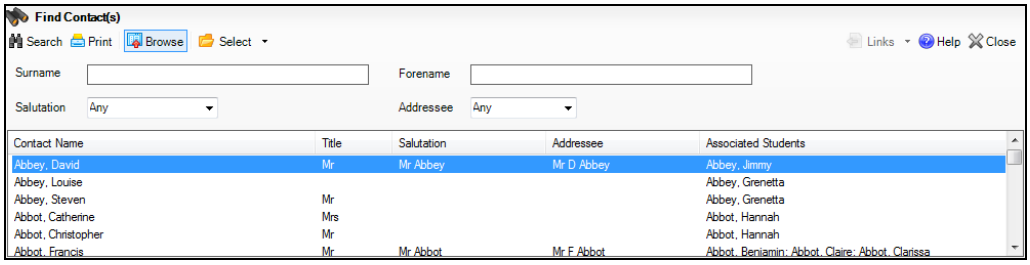
The **Generated Salutation** and **Generated Addressee** columns display the proposed changes. The **Salutation Changed** and **Addressee Changed** columns indicate where a change to the existing data will be made.

11. Once you have reviewed and are happy with the proposed changes, click the **Save** button to update the pupil/student records.

More Information:
Setting up the Addressee Format on page *19*

Updating Contact Salutation/Addressee Information in Bulk

1. Select **Routines | Pupil** (or **Student**) **| Update Salutation/Addressee | Contact** to display the **Find Contact(s)** browser.

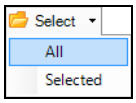


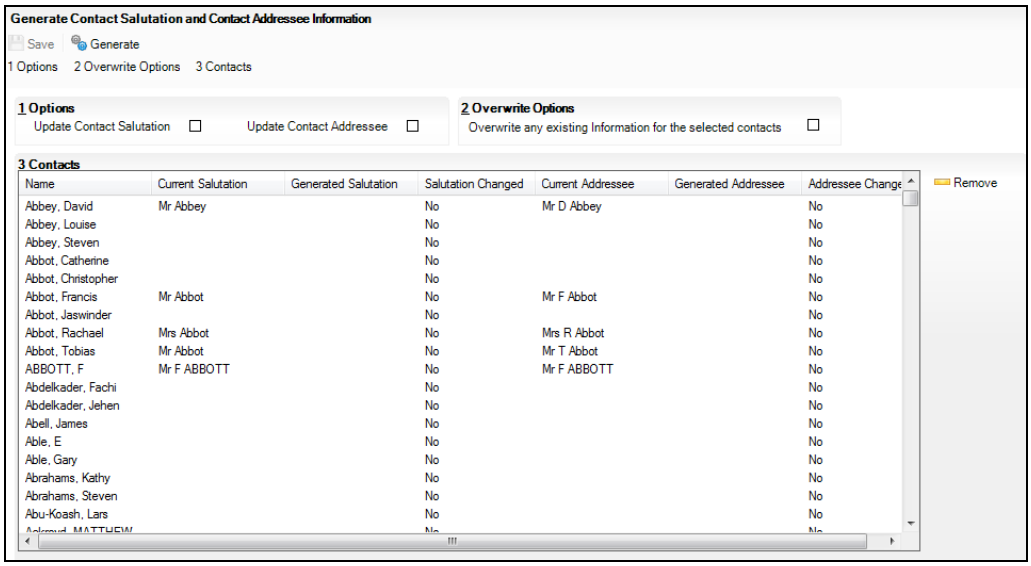
Contact Name	Title	Salutation	Addressee	Associated Students
Abbey, David	Mr	Mr Abbey	Mr D Abbey	Abbey, Jimmy
Abbey, Louise				Abbey, Grenetta
Abbey, Steven	Mr			Abbey, Grenetta
Abbot, Catherine	Mrs			Abbot, Hannah
Abbot, Christopher	Mr			Abbot, Hannah
Abbot, Francis	Mr	Mr Abbot	Mr F Abbot	Abbot, Benjamin; Abbot, Claire; Abbot, Clarissa

2. Enter either all or part of the pupil/student's **Surname** and/or **Forename**.
3. Select applicable values from the drop-down lists to further restrict the list of contacts returned.
4. Click the **Search** button to display all contacts who match the search criteria specified.

> *NOTE: Contacts associated with applicants will be displayed in the browser list but the applicants themselves will not be displayed in the **Associated Students** column because they are not yet on-roll pupil/students. However, this will not prevent you from generating salutation and/or addressee information for the associated contact.*

5. Click the **Print** button to print the details currently displayed in the **Find Contact(s)** browser.
6. Highlight the required contact (multiple contacts can be selected by holding down either the **Shift** or **Ctrl** keys and clicking the required names) then click the **Select** button to display their names in the **Generate Contact Salutation and Contact Addressee Information** panel. Alternatively, to display all contacts currently displayed in the browser, choose **All** from the **Select** drop-down menu.



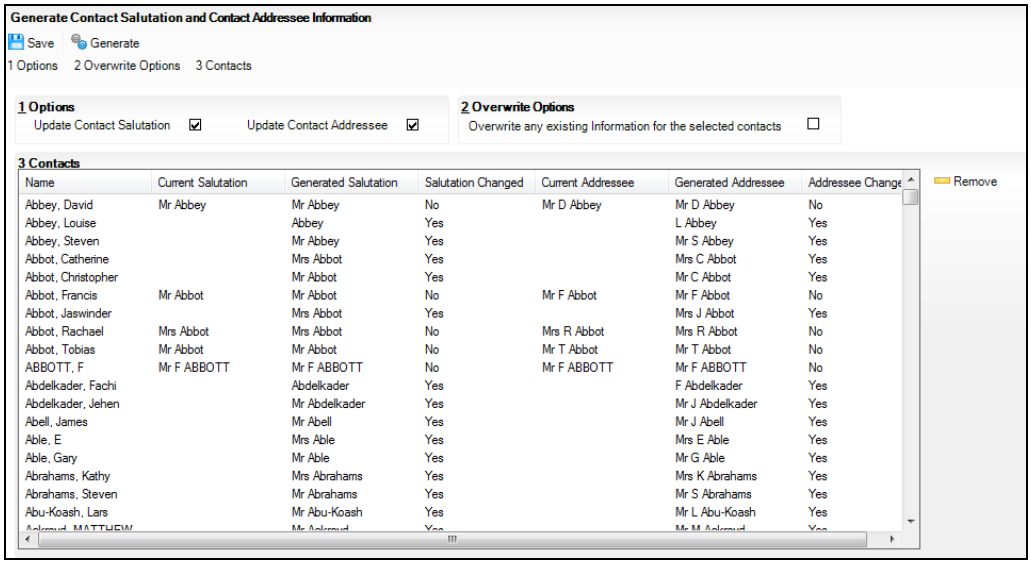


The **Contacts** panel displays the currently selected contacts, along with their **Current Salutation** and **Current Addressee** information, if recorded.

7. If you have inadvertently selected a contact who you do not wish to update, highlight their name and click the **Remove** button.
8. To **Update Contact Salutation** and/or **Update Contact Addressee** information for the selected contacts, select the respective check boxes.
9. If required, select the check box to **Overwrite any existing Information for the selected contacts**.

> ***IMPORTANT NOTE:*** *If this check box is selected, any contact records with existing contact salutation and/or addressee information will be overwritten with the default values, as determined by SIMS. If contact salutation and/or addressee information is not currently recorded for a number of contact records, and you wish to update only the records where this information is missing, deselect the check box.*

10. Click the **Generate** button. A preview of the changes to be made is displayed the **Contacts** panel.



Name	Current Salutation	Generated Salutation	Salutation Changed	Current Addressee	Generated Addressee	Addressee Change
Abbey, David	Mr Abbey	Mr Abbey	No	Mr D Abbey	Mr D Abbey	No
Abbey, Louise		Abbey	Yes		L Abbey	Yes
Abbey, Steven		Mr Abbey	Yes		Mr S Abbey	Yes
Abbot, Catherine		Mrs Abbot	Yes		Mrs C Abbot	Yes
Abbot, Christopher		Mr Abbot	Yes		Mr C Abbot	Yes
Abbot, Francis	Mr Abbot	Mr Abbot	No	Mr F Abbot	Mr F Abbot	No
Abbot, Jaswinder		Mrs Abbot	Yes		Mrs J Abbot	Yes
Abbot, Rachael	Mrs Abbot	Mrs Abbot	No	Mrs R Abbot	Mrs R Abbot	No
Abbot, Tobias	Mr Abbot	Mr Abbot	No	Mr T Abbot	Mr T Abbot	No
ABBOTT, F	Mr F ABBOTT	Mr F ABBOTT	No	Mr F ABBOTT	Mr F ABBOTT	No
Abdelkader, Fachi		Abdelkader	Yes		F Abdelkader	Yes
Abdelkader, Jehen		Mr Abdelkader	Yes		Mr J Abdelkader	Yes
Abell, James		Mr Abell	Yes		Mr J Abell	Yes
Able, E		Mrs Able	Yes		Mrs E Able	Yes
Able, Gary		Mr Able	Yes		Mr G Able	Yes
Abrahams, Kathy		Mrs Abrahams	Yes		Mrs K Abrahams	Yes
Abrahams, Steven		Mr Abrahams	Yes		Mr S Abrahams	Yes
Abu-Koash, Lars		Mr Abu-Koash	Yes		Mr L Abu-Koash	Yes

The **Generated Salutation** and **Generated Addressee** columns display the proposed changes. The **Salutation Changed** and **Addressee Changed** columns indicate where a change to the existing data will be made.

11. Once you have reviewed and are happy with the proposed changes, click the **Save** button to update the contact records.

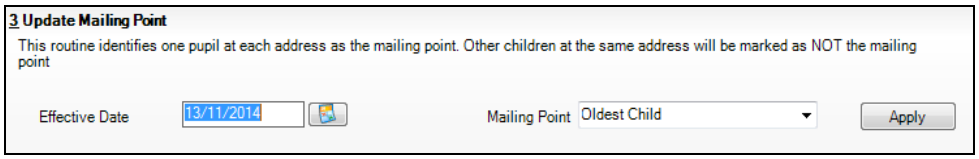
More Information:
Setting up the Addressee Format on page *19*

Updating the Mailing Point

The normal day-to-day correspondence intended for parent's perusal, is usually sent home with one of the students in the family. To identify the chosen pupil/student from each family who is considered to be the mailing point, the **Mailing Point** check box should be selected on their **Pupil** (or **Student**) **Details** page.

This flag really identifies one pupil/student at a particular home address, regardless of their familial relationship. For example, two pupil/students may be foster children and live at the same address but not actually be related, only one of these children would need to be designated as the mailing point. Two pupil/students may be brother and sister and live at different addresses so they would both be considered as a possible mailing point for each separate address. There is no reason why more than one pupil/student living at a particular address could not be flagged as the mailing point. This may ensure the safe delivery of letters by one or other of the pupil/students, if not both.

1. Select **Tools | Housekeeping | General** to display the **Housekeeping** page.
2. Click the **Update Mailing Point** hyperlink to display the **Update Mailing Point** panel.



3. Specify the **Effective Date** by clicking the **Calendar** button and selecting the date.

   The **Effective Date** field enables you to update the mailing point for dates in the past, present or future. Choosing an effective date in the future enables the school administrator to set which pupils/students/applicants will be used as their family's mailing point for the forthcoming academic year.

   The **Mailing Point** drop-down list defaults to **Oldest Child** but can be changed to **Youngest Child**, if required.
4. Click the **Apply** button to update the pupil/student's mailing point.

Resetting Parental Ballot Flags

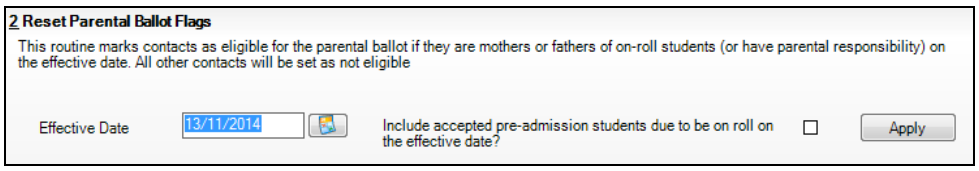
When there is a vacant position for a parent governor in the school, it is necessary to contact all the people who are eligible to stand for election to the position and who are eligible to vote for the final candidates.

All parents who have a child registered as 'on-roll' at the school are eligible for the election. The term 'Parents' includes natural parents and anyone else with parental responsibility.

The **Parental Ballot** check box, which is selected by the user on the **Contacts Basic Details** page (via **Focus | Person | Contacts**), indicates a contact's right to vote. If a contact is not eligible, the check box should be deselected.

1. Select **Tools | Housekeeping | General** to display the **Housekeeping** page.

2. Click the **Reset Parental Ballot Flags** hyperlink to display the **Reset Parental Ballot Flags** panel.



3. Specify the **Effective Date** by clicking the **Calendar** button and selecting the date.

Calendar button

The **Include accepted pre-admission students due to be on roll on the effective date?** check box defaults to **No**, i.e. deselected. Select the check box if you would like to reset applicant's contacts in addition to other pupil/student's contacts with parental responsibility.

4. Click the **Apply** button to reset parental ballot flags.

Deleting Unlinked Contacts

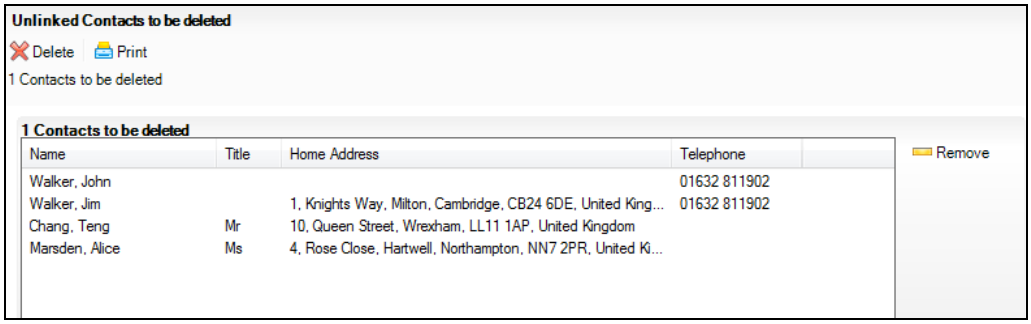
This routine enables users to delete contacts that are no longer linked to an individual within SIMS, e.g. a pupil/student, an agent or a staff member. The link may now be obsolete because the pupil/student, agent or staff member themselves has been deleted and these contacts have no other active role to justify them remaining in the database.

Contacts that are linked to pupil/students who have previously left the school cannot be deleted even if they have no other links to current pupil/students.

1. Select **Tools | Housekeeping | Delete Unlinked Contacts** to display the **Find Unlinked Contacts** browser.

2. Enter the contact's **Surname** or **Forename**. Alternatively, enter the **Town** or the **Post Code** where the contact resides or leave all the fields blank to search for all unlinked contacts.
3. Click the **Search** button to display a list of contacts who match the search criteria entered.
4. Highlight the names of the required contacts from the list displayed using the **Ctrl**, **Shift** and down-arrow keys. Contacts can be deleted individually, if preferred.

5. Click the **Select** button to copy the selected contacts into the **Unlinked Contacts to be deleted** panel.



6. If you have inadvertently selected a contact who you do not wish to delete, highlight their name from the list and click the **Remove** button. This places their details back into the **Find Unlinked Contacts** browser where they can be deleted at a later date, if required.
7. If you wish to retain a list of the contacts that are to be deleted, click the **Print** button before finally deleting the contacts.
8. Click the **Delete** button to delete the selected unlinked contacts.

Adding an Agency

In SIMS, an 'agency' is an organisation that employs agents who have been, or will be recorded in SIMS, such as the Education Welfare Service, Local Authority Support Team, a Taxi Firm, etc. An 'agent' is an individual who has some involvement with a pupil/student and works for an agency recorded in SIMS such as Education Welfare Officers (EWOs), doctors, educational psychologists, speech therapists, etc.

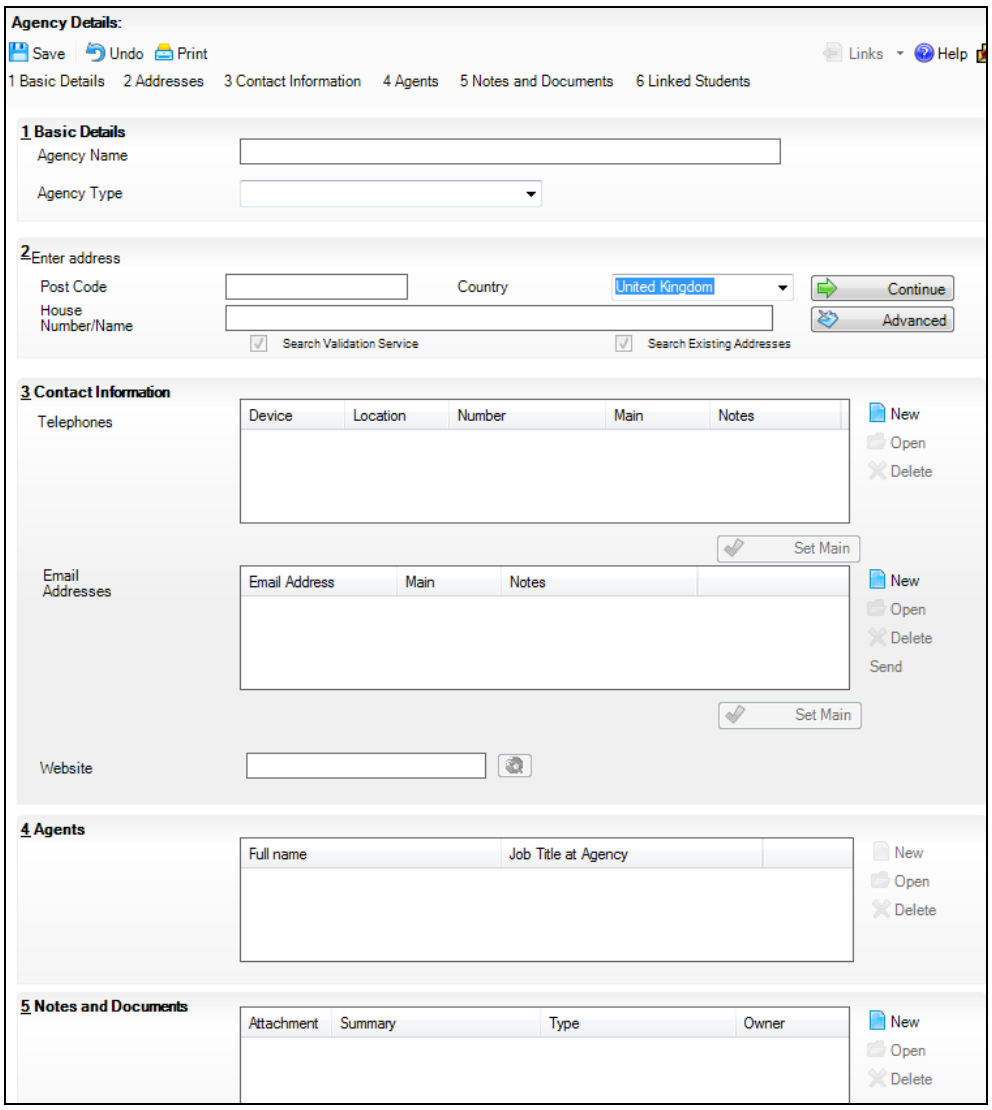
Once added, one or more pupil/students can be attached to the agency. This can be particularly useful for example, for recording all the pupil/students who use a specific Behavioural Support Service.

It is advisable to add agencies to SIMS before adding individual agents. This enables agents to be attached to the required agency at a later stage.

1. Select **Focus | Agency | Agencies** to display the **Browse Agency** browser.

2. Carry out a search to ensure the agency does not already exist by entering the **Agency Name** then clicking the **Search** button.

3. If you are sure the agency does not already exist, click the **New** button to display the **Agency Details** page.



4. Enter the **Agency Name** in the **Basic Details** panel.

5. Select the type of agency from the **Agency Type** drop-down list, such as **Local Authority**.

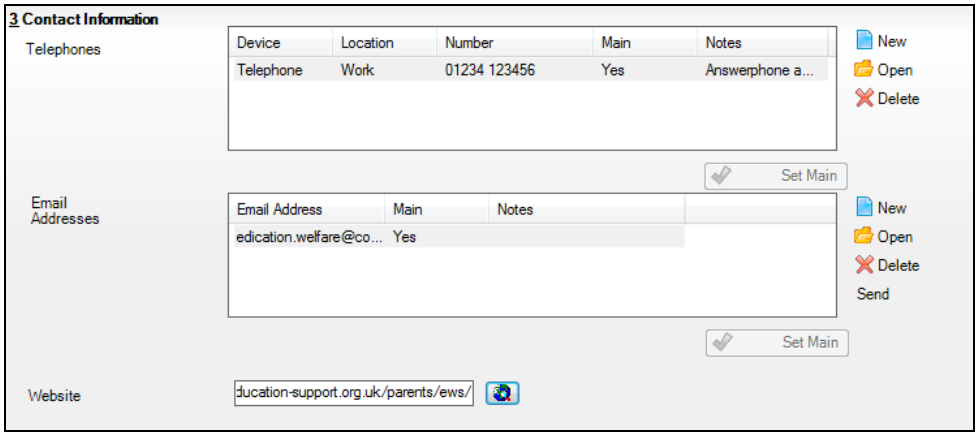
Adding Address Information

Click the **Addresses** hyperlink on the **Agency Details** page to display the panel.

To complete the addition of an agency address, follow the process as described in *Adding/Editing an Address* in the *Maintaining Pupil/Student Information* chapter of the *Managing Pupil/Students* handbook.

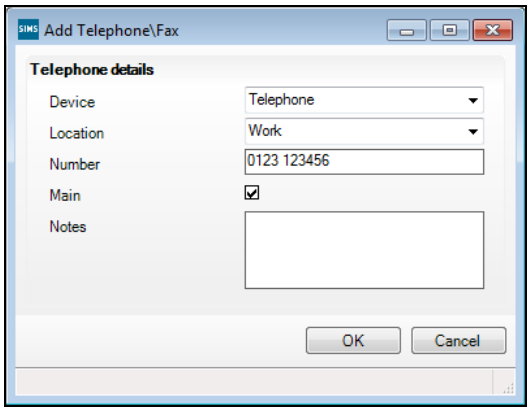
Adding Contact Information

Click the **Contact Information** hyperlink on the **Agency Details** page to display the **Contact Information** panel.



Adding a Telephone/Fax Number

1. Click the **New** button adjacent to the **Telephones** panel on the **Agency Details** page to open the **Add Telephone\Fax** dialog.

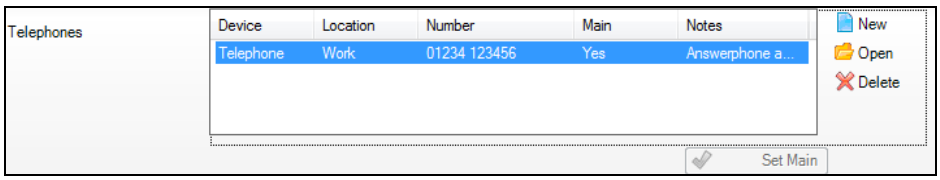


2. Specify the type of **Device** (Telephone or Fax), together with its **Location** (Work or Mobile) from the relevant drop-down lists.
3. Enter the telephone or fax **Number**.

> *NOTE: The format of the telephone/fax number is optional. STD codes can be inserted in brackets if required and spaces can be added between the STD code and number if preferred. It is recommended that either brackets or spaces are used to aid clarity.*

4. Indicate whether this is the main phone number by selecting or deselecting the **Main** check box. Only one number can be set as **Main** at any one time. It is recommended that the main number is the number to be used in the event of an emergency.
5. Enter any relevant **Notes** that may apply to the use of this telephone/fax number, e.g. `Answerphone available after 6pm`.

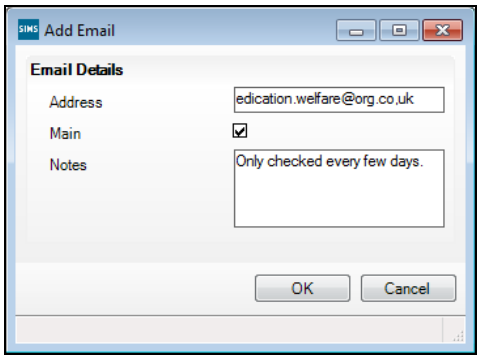
6. Click the **OK** button to add the number. Repeat as required. Any numbers added are displayed in the **Telephones** panel.



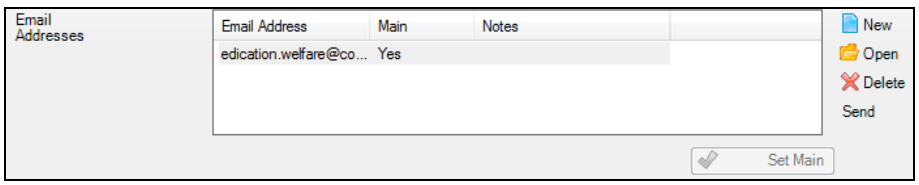
7. If required, change the main number by highlighting the required number and clicking the **Set Main** button.

Adding an Email Address

1. Click the **New** button adjacent to the **Email Addresses** pane on the **Agency Details** page to open the **Add Email** dialog.
2. Enter the email **Address** in the field provided. The field will remain red until both a @ symbol and a full stop have been included in the email address.



3. If this is the main email address for the Agent, select the **Main** check box.
4. Enter any relevant **Notes** that may apply to the use of this email address.
5. Click the **OK** button to add the email address. Repeat as required. Any email addresses added are displayed in the **Email Addresses** panel.



6. Change the main email address if required, by clicking the **Set Main** button.
7. Send an email whenever required, by highlighting the required email address then clicking the **Send** button.

Adding a Website

To add a website, enter the full website address. Click the **Launch website** button to check that the address has been entered correctly.

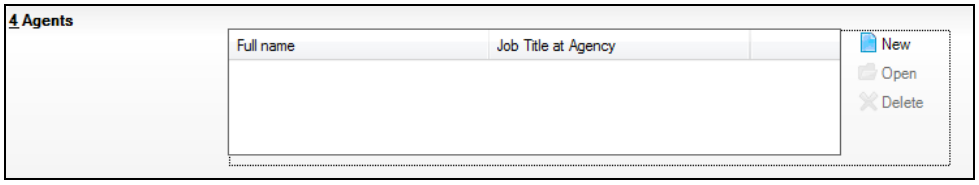
Launch Website button

Saving the Record

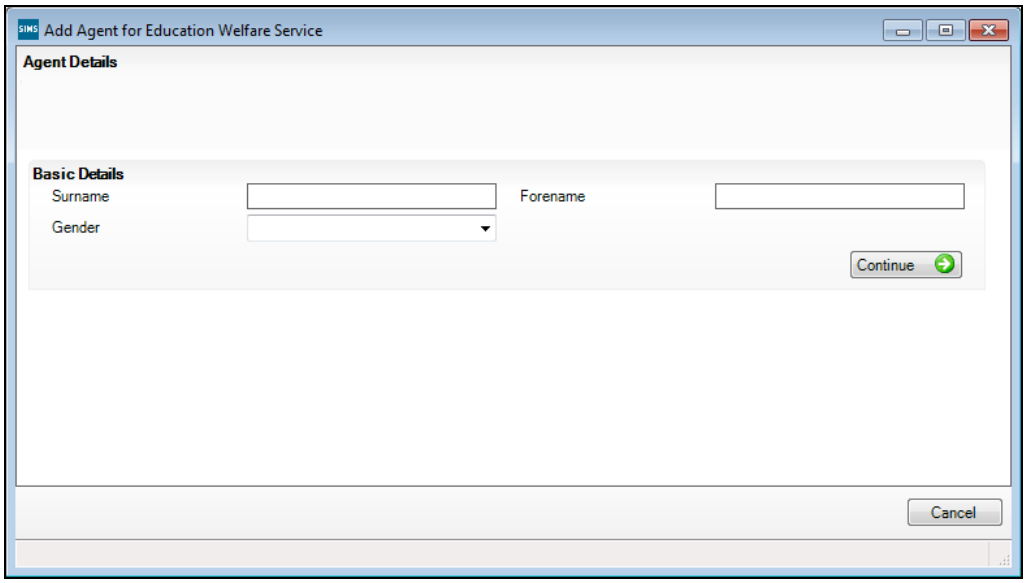
Click the **Save** button on the toolbar to add the agency.

Adding Agents

It is possible to link the pupil/student to any existing agency, such as an Education Welfare Officer, Speech Therapist, etc.

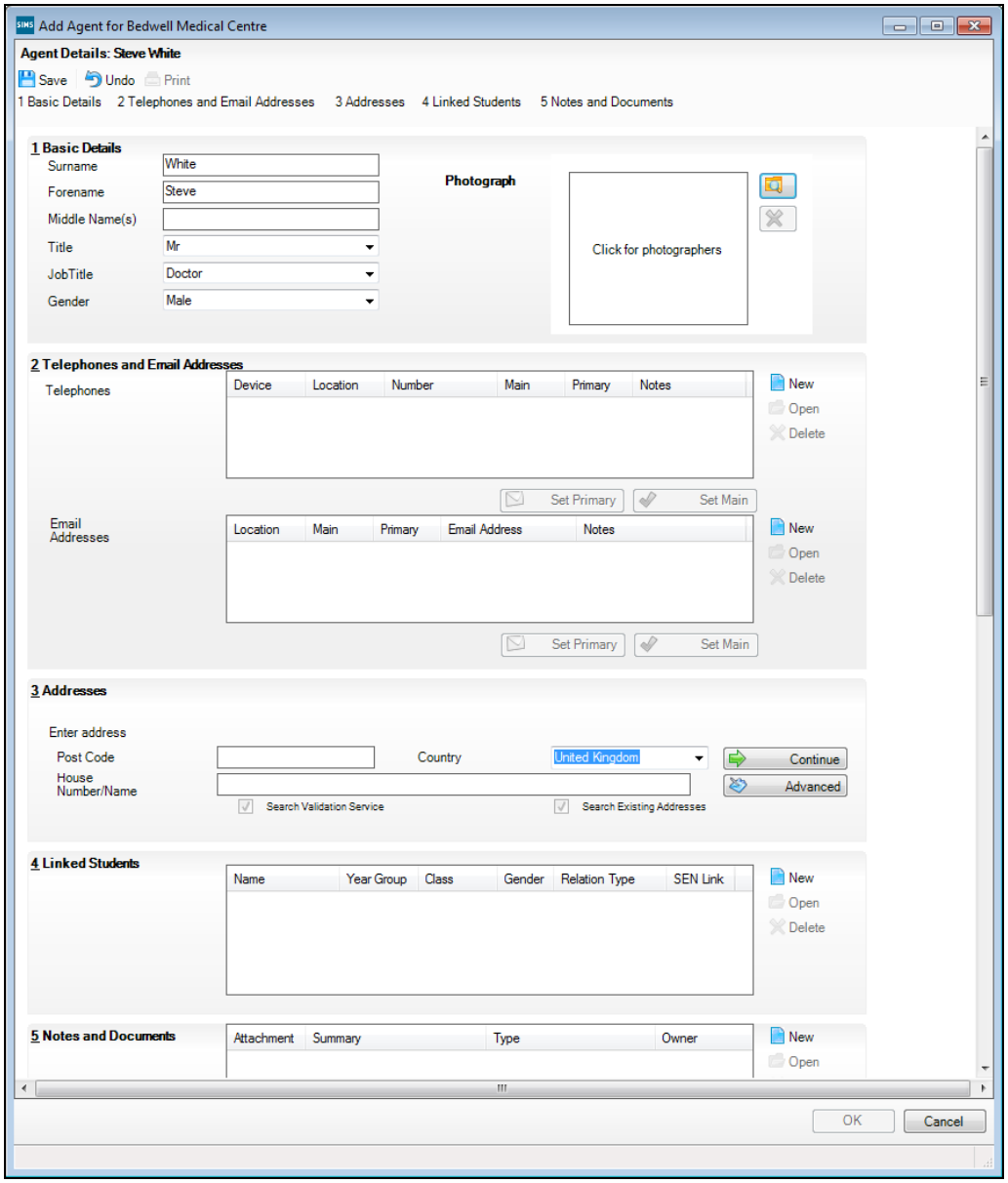


1. Click the **New** button adjacent to the **Agents** panel to display the **Add Agent** dialog.



2. In the **Basic Details** panel enter the **Surname** and **Forename** of the agent and select the **Gender** from the drop-down list.

3. Click the **Continue** button to display the **Agent Details** page.

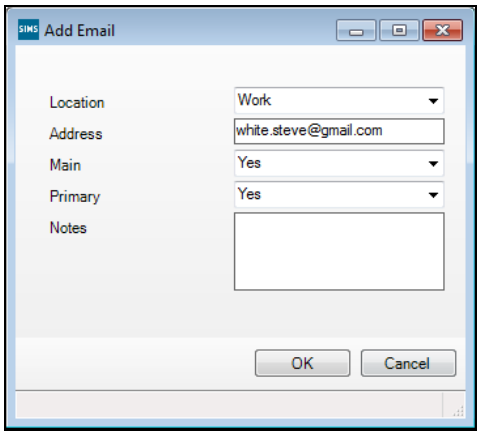


4. In the **Basic Details** panel enter the **Middle Name(s)** of the agent.
5. Select the **Title** and **Job Title** from the drop-down lists.
6. Click the **Add Photo** button to display the **Select photograph** dialog.

Add Photo button

7. Select the required photograph and click the **Open** button to display agent's photograph in the **Photograph** pane.
8. In the **Telephones and Email Addresses** panel click the **New** button adjacent to the **Telephones** pane to display the **Add Telephone\Fax** dialog.

9. Complete the fields of the dialog (please see *Adding a Telephone/Fax Number* on page *181*).
10. Click the **New** button adjacent to the **Email Addresses** pane to display the **Add Email** dialog.



11. Specify the **Location** of the email address from the drop-down list.
12. Enter the email **Address** in the field provided.
13. Specify whether this is the **Main** email address for contacting the selected individual.

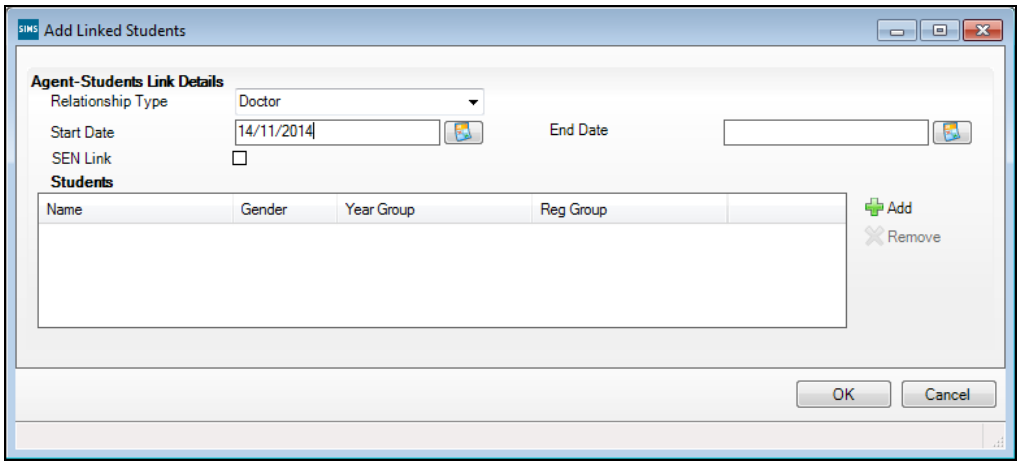
    It is possible to change the status of an existing email address and identify it as the main address by clicking the **Set Main** button.
14. Indicate if this is the **Primary** email address by selecting **Yes** from the drop-down list.

    It is possible to change the status of an existing email address and identify it as the Primary address by clicking the **Set Primary** button.
15. Enter any relevant **Notes** that may apply to the use of this email address.
16. Click **OK** to save the details.
17. Click the **Save** button on the **Agent Details** page.
18. Click the **Addresses** hyperlink on the **Agent Details** page to display the **Addresses** panel.

    To complete the addition of an agent address, follow the process as described in *Adding/Editing an Address* in the *Maintaining Pupil/Student Information* chapter of the *Managing Pupil/Students* handbook.

Adding Linked Students

1. Click the **New** button adjacent to the **Linked Students** panel to display the **Add Linked Students** dialog.



2. In the **Agent-Students Link Details** panel select the appropriate **Relationship Type** from the drop-down list. This indicates the capacity in which the agent is associated with the pupil/student.

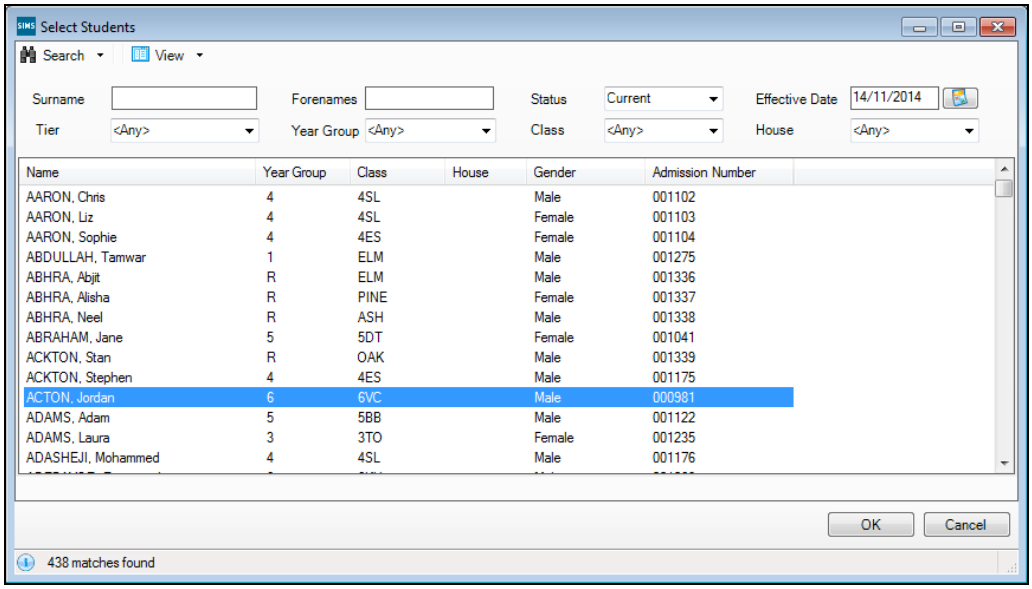
   The **Start Date** defaults to today's date but can be changed by clicking the **Calendar** button and selecting a different date. Alternatively, the date can be entered in dd/mm/yyyy format.

   The **End Date** can be left blank until the pupil/student ceases to be linked to the agent.

3. Select the **SEN Link** check box if the agent is providing additional support for a pupil/student with Special Educational Needs.

   If this is the case, then the pupil/student's Special Educational Needs record must be updated to reflect that they are receiving additional support from this agent.

4. Click the **Add** button adjacent to the **Students** pane to display the **Select Students** browser.



5. Use the **Search** fields to display all the pupil/students, who match the search criteria entered or click the **Search** button to display all the pupil/students.
6. Select the required student and click the **OK** button to display the **Add Linked Students** dialog. The name of the selected student is now displayed in **Students** pane.
7. Click the **OK** button on the **Add Linked Students** dialog when all relevant students/agents have been linked.

Adding Notes/Documents

In the **Notes and Documents** panel you can attach documents relevant to agent's work.

1. Click the **New** button adjacent to the **Notes and Documents** panel to display **Add Note/Document** dialog.
2. Complete the fields of the dialog (please see *Adding Note/Document* on page *48*).

Viewing Linked Applicants/Prospective Students to Agencies

1. Click the **Linked Applicants** hyperlink to display the **Linked Applicants** panel.

   In the panel, you can see all the current applicants associated with the selected agency. The **Total** number of the current applicants is displayed at the bottom left-hand side of the table.
2. Select the **Show Withdrawn Applicants** check box to display all the current and withdrawn applicants.

   The **Total** number of the current, and withdrawn applicants is displayed at the bottom left-hand side of the table.
3. Click the **Linked Prospective Students** hyperlink to display the **Linked Prospective Students** panel.

In the panel, you can see all the current prospective students associated with the selected agency. The **Total** number of the current prospective students is displayed at the bottom left-hand side of the table.

4. Select the **Show Withdrawn Prospective Students** check box to display all the current and withdrawn prospective students.

   The **Total** number of the current, and withdrawn prospective students is displayed at the bottom left-hand side of the table.

Merging Agents and Agencies

Over time, it is possible for duplicate agents and agencies to be entered into SIMS. This may have occurred during the migration from dBase to SQL, or simply where data has been inadvertently replicated.

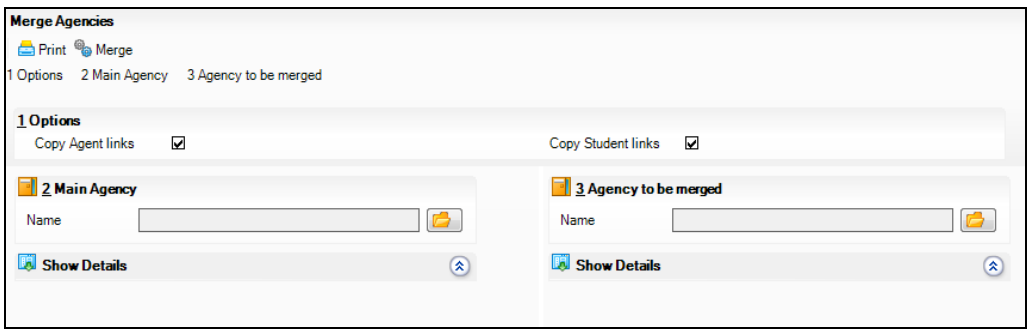
It is possible to merge the information stored against duplicate agencies (including linked agents and pupil/students) or agents (including linked agencies, pupil/students and documents). Once merged, the agency or agent is then removed from SIMS.

NOTE: This process permanently merges duplicate agents/agencies. You may wish to carry out a backup before proceeding.

Merging Agencies

Agencies being merged must be of the same agency type, such as **Medical** or **Social Services**.

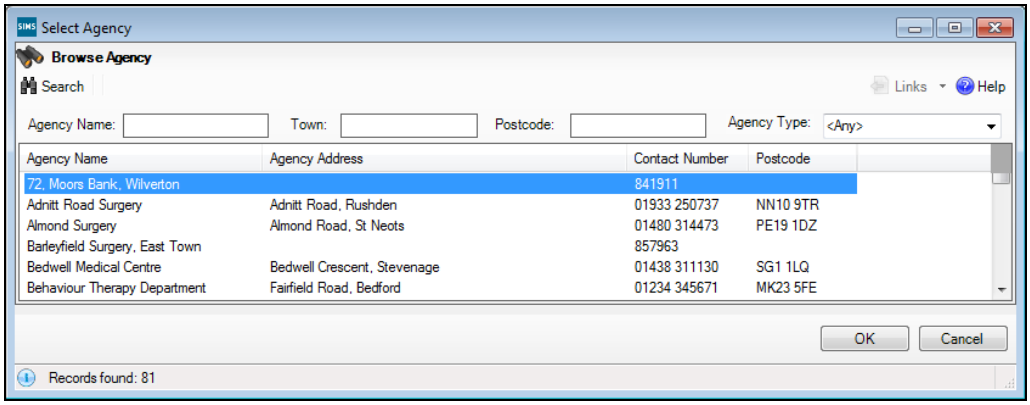
1. Select **Tools | Housekeeping | Merge Agencies** to display the **Merge Agencies** page.



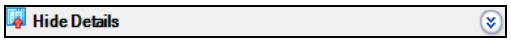
2. In the **Options** panel, the **Copy Agent Links** and **Copy Student Links** check boxes are selected by default. Deselect these check boxes if required.
   - **Copy Agent Links** – merges any agents associated with the agency (displayed in the **Linked Agents** panel).
   - **Copy Student Links** – merges any pupil/students who are linked to the agency (displayed in the **Linked Students** panel).

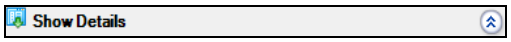
IMPORTANT NOTE: *If you elect not to copy agents to the main agency, you should ensure (either before or after merging) that they are assigned to another agency.*

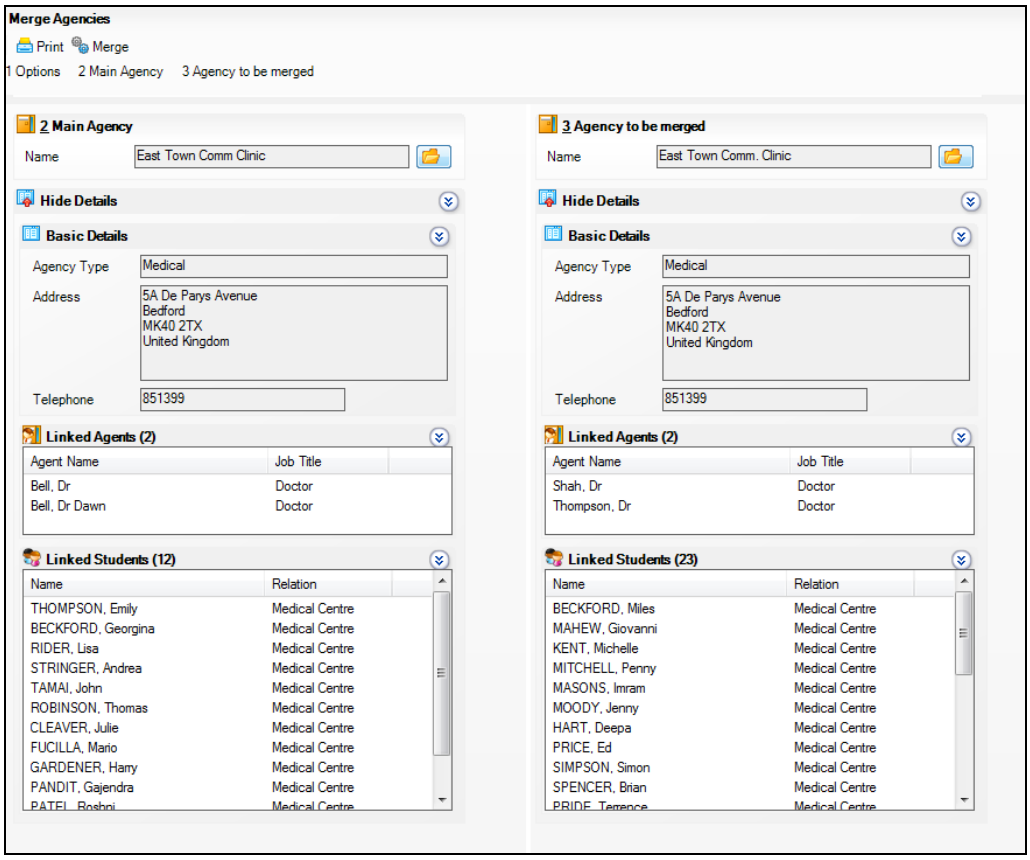
3. In the **Main Agency** panel, select the agency that is to be retained by clicking the **Open** button to open the **Select Agency** browser.



4. Search for the required agency, highlight the name then click the **OK** button to select them. The details of the agency (including the **Agency Type**, **Address** and **Telephone**) are displayed together with any **Linked Agents** and **Linked Students**. These details can be hidden at any point by clicking the **Hide Details** hyperlink, which changes to display **Show Details**. This is a toggle feature and can be used to alternative been hide and show.

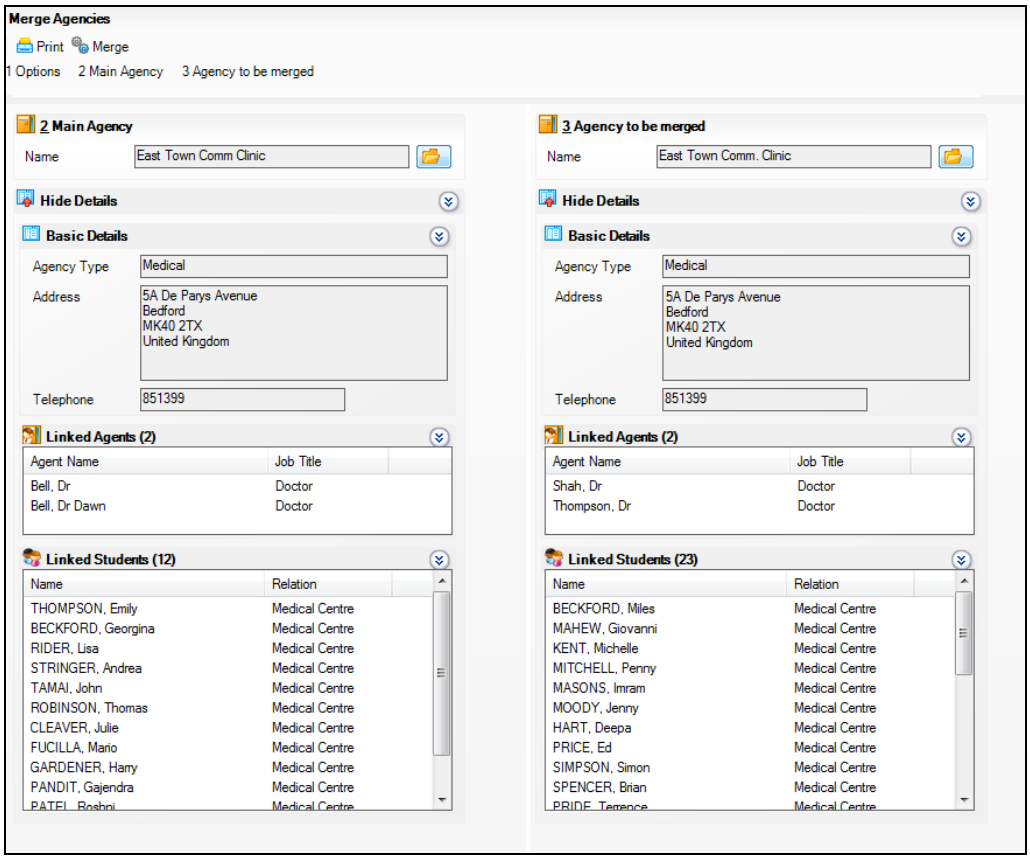




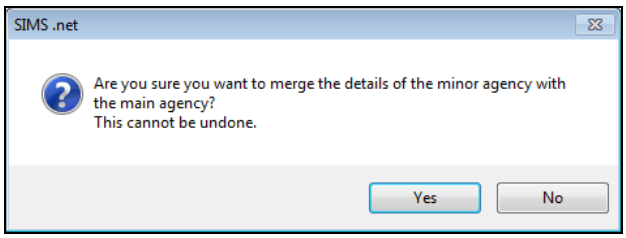


Alternatively, individual details can be hidden by clicking the **chevron** button on the individual section title, such as **Basic Details**. Click again to show the details.

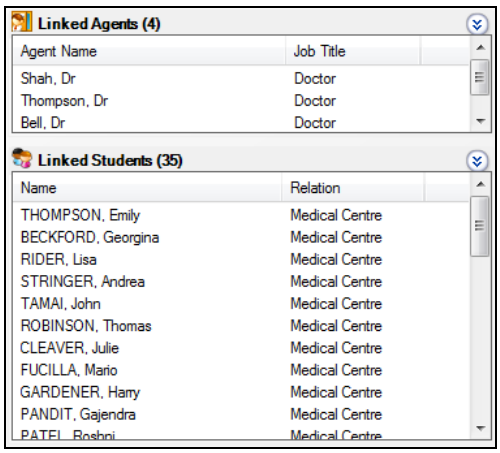
5. Select the agency whose details you wish to merge with the main agency by clicking the **Open** button in the **Agency to be Merged** panel. The details of the agency are displayed in the same way as the main agency.



6. If required, print a copy of the details by clicking the **Print** button on the toolbar.
7. Once you are certain that the required agencies have been selected, click the **Merge** button on the toolbar to merge the information.
8. A message is displayed prompting for confirmation that you wish to continue. This process is irreversible. Only click the **Yes** button if you are sure that these agencies are to be merged.



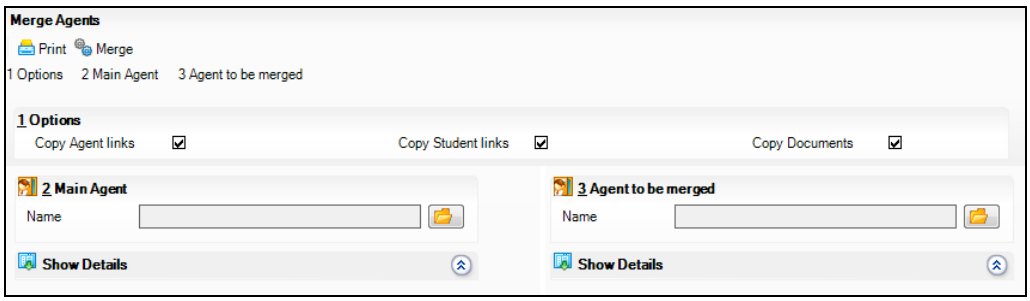
Any agents or pupil/students linked to the agency to be merged (minor agency) are linked the main agency (unless you elected not to do so). The **Linked Agents** and **Linked Students** panels for the main agency are updated to show any merged agents and/or pupil/students.



Merging Agents

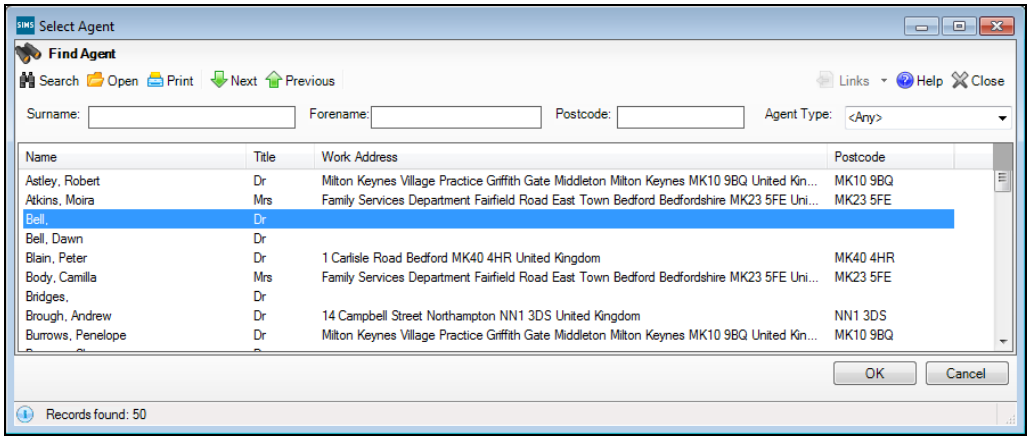
When merging agents, any other role that an agent has is retained – only the agents are merged. If for example, an agent is also a contact, the agents are merged, but the contact record will still be retained. Check the **Other Roles** panel when merging.

1. Select **Tools | Housekeeping | Merge Agents** to display the **Merge Agents** page.

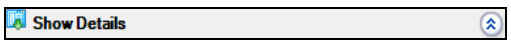


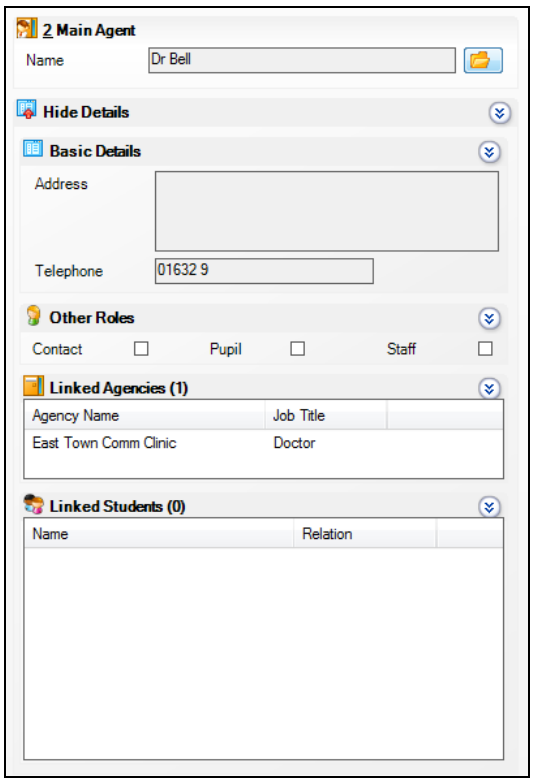
2. In the **Options** panel, the **Copy Agency Links**, **Copy Student Links** and **Copy Documents** check boxes are selected by default. Deselect these check boxes if required.
   - **Copy Agency Links** – merges any agencies with which the agent is associated (displayed in the **Linked Agencies** panel).
   - **Copy Student Links** – **merges** any pupil/students who are linked to the agent (displayed in the **Linked Students** panel).
   - **Copy Documents** – **merges** any attached documents to the main agent.

3. In the **Main Agent** panel, select the agent that is to be retained by clicking the **Open** button to open the **Select Agent** browser.



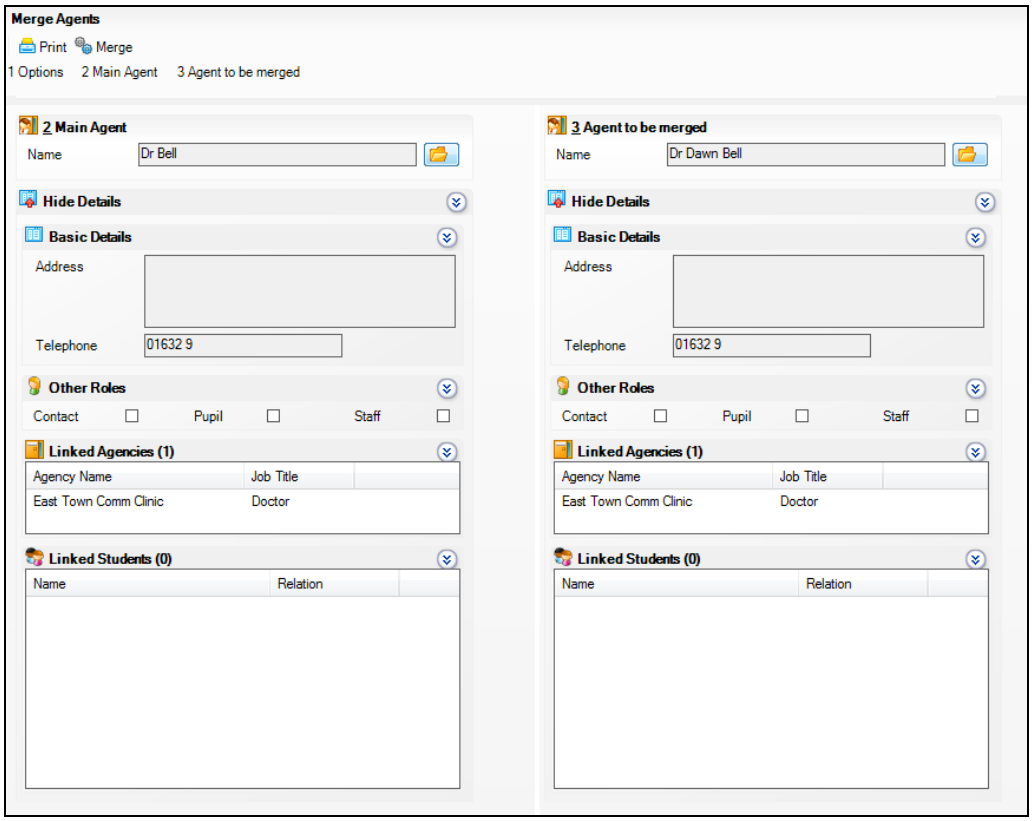
4. Search for the required agent, highlight the name then click the **OK** button to select them. The details of the agent (including the **Address** and **Telephone**) are displayed together with any **Linked Agencies** and **Linked Students**. Any other roles held by the agent are displayed in the **Other Roles** panel. They could for example, also be a contact, pupil/student or member of staff. These details can be hidden at any point by clicking the **Hide Details** hyperlink which changes to display **Show Details**. This is a toggle feature and can be used to alternative been hide and show.



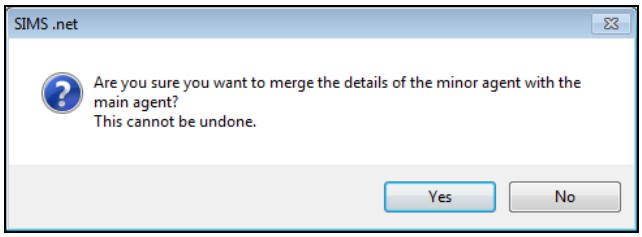


Alternatively, individual details can be hidden by clicking the **chevron** button on the individual section title, such as **Basic Details**. Click again to show the details.

5. Select the agent whose details you wish to merge with the main agent by clicking the **Open** button in the **Agent to be Merged** panel. The details of the agent are displayed in the same way as the main agent.



6. Check the **Other Roles** panel to see any other roles that the agent may have. Any other role records are retained following the merge.
7. If required, print a copy of the details by clicking the **Print** button on the toolbar.
8. Once you are certain that the required agents have been selected, click the **Merge** button on the toolbar to merge the information.
9. A message is displayed prompting for confirmation that you wish to continue. This process is irreversible. Only click the **Yes** button if you are sure that these agents are to be merged.



Any linked agencies, students or and/or documents are merged with the new agent. The **Linked Agencies** and **Linked Students** panels for the main agency are updated to show any merged agents and/or pupil/students.

Tidying and Merging Address Details

Overview of Tidying Addresses

The Address Tidy routine is used to review addresses stored in SIMS, identify those that contain erroneous or incorrectly formatted information, and wherever possible, make applicable changes to ensure addresses are accurate and uniformly formatted. A report identifying the proposed changes is produced, which can be checked before proceeding.

Address tidying can involve moving data between fields, (e.g. a post code that has been incorrectly entered in the **Town** field is moved to the **Post Code** field), moving telephone numbers and email addresses to their proper locations, or correcting the formatting in various ways (e.g. changing the capitalisation of county information).

Tidying addresses increases the likelihood of success when searching for an address and reduces the risk of the same address being added twice. The tidy process also increases the chances of identifying duplicate addresses (e.g. moving a post code incorrectly stored in the **Town** field, to the **Post Code** field, may then match another address based on that post code). Such addresses can subsequently be merged by the Address Merge routine.

When tidying addresses, all addresses that have not yet been validated are considered for tidying, including school and agency addresses. A count is applied to each address to ensure that it is included in the Address Tidy routine a maximum of two times only. This ensures that any manual changes to addresses are not overwritten by the Address Tidy routine in the future. It also reduces the number of addresses that need to be tidied and therefore increases the performance.

The Address Tidy routine should be run twice, because some of the rules used in the routine depend on a comparison with other addresses. Therefore, any addresses tidied during the first run may enable further improvements on the second run of the routine to be made.

It is therefore recommended that the Address Tidy routine is run either twice in succession, or ideally, within the same day. You should make any necessary further manual corrections to addresses only after the second run of the routine. This ensures that any addresses edited manually, are not affected by subsequent tidy routines.

Any new addresses added to the database since the tidy routine has been run are available for tidying twice.

Overview of Merging Duplicate Addresses

Duplicate addresses may exist in SIMS, because they have been double entered, or imported from an incorrectly formatted CTF/ATF file. These duplicate addresses can be merged into a single address, and each resident at that address is then assigned to the single address.

Running the Unmatchable Address Report

The Unmatchable Address report identifies any addresses that:

- are too incomplete to represent a unique residence
- have data in incorrect fields (e.g. post code data in the **Town** field
- contain superfluous data such as phone numbers or other contact details.

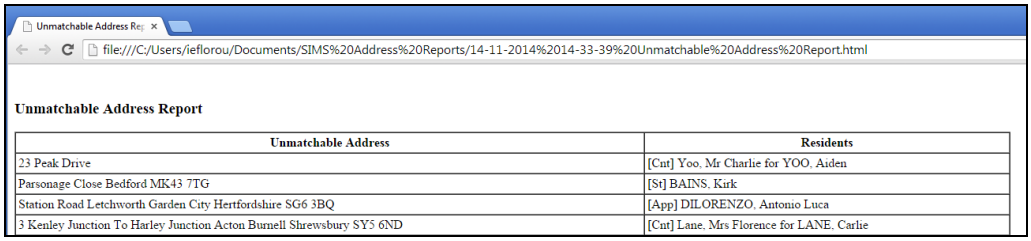
It is advisable to run this report before running the Tidy and Merge Addresses routine for the following reasons:

- It identifies addresses that obviously contain non-address information (e.g. telephone numbers, people's names, etc.), which can then be manually corrected.

  NOTE: This is particularly important because any phone numbers or email addresses found in address fields are removed during the tidy process, and assigned to all the residents living at that address. You may therefore wish to manually move this information before proceeding with the tidy routine.

- It identifies addresses that are not complete enough to identify a unique residence. Such addresses should be manually edited before proceeding with the merge routine.

Select **Tools | Housekeeping | Bulk Address Tools | Unmatchable Address Report** to display the report in your web browser (the report may take a short while to display).



The report lists any unmatched addresses together with the name of the people who are residents at the address. It is recommended that these addresses are manually edited before proceeding further.

The report is saved to the following folder in both .html and .txt format:

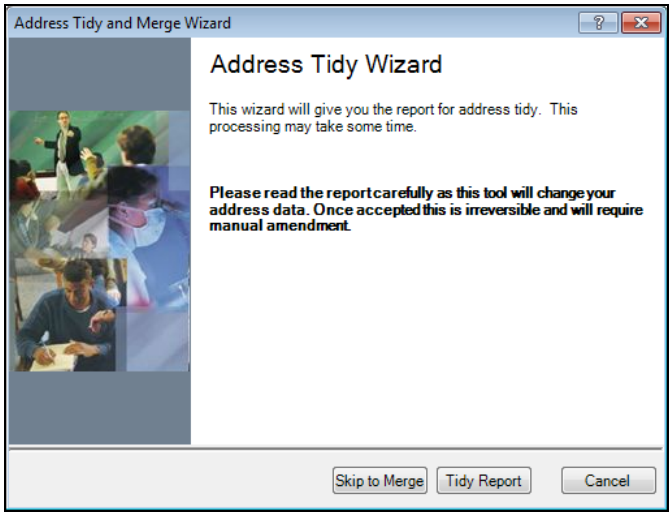
`C:\Documents and Settings\<Username>\My Documents\SIMS Address Reports`

Tidying Address Data

It is recommended that you run the Unmatchable Address report as described in the previous section before proceeding. Due to the memory intensive nature of this routine, it is recommended that all other users log out of SIMS when this routine is run.

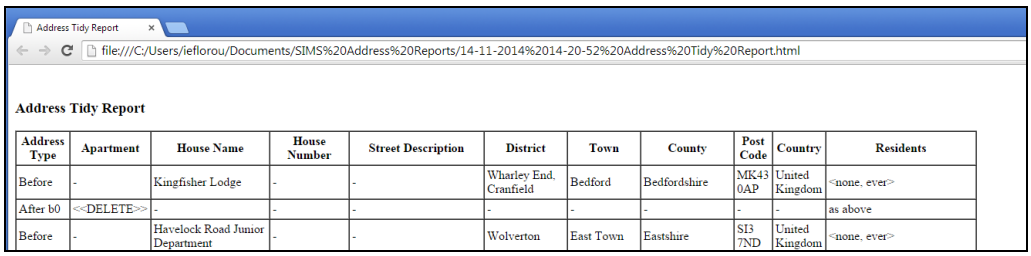
IMPORTANT NOTE: *Please carry out a full backup of the SIMS database before running either of tidy or merge routines.*

1. Select **Tools | Housekeeping | Bulk Address Tools | Tidy and Merge Addresses** to display the **Address Tidy and Merge** wizard.



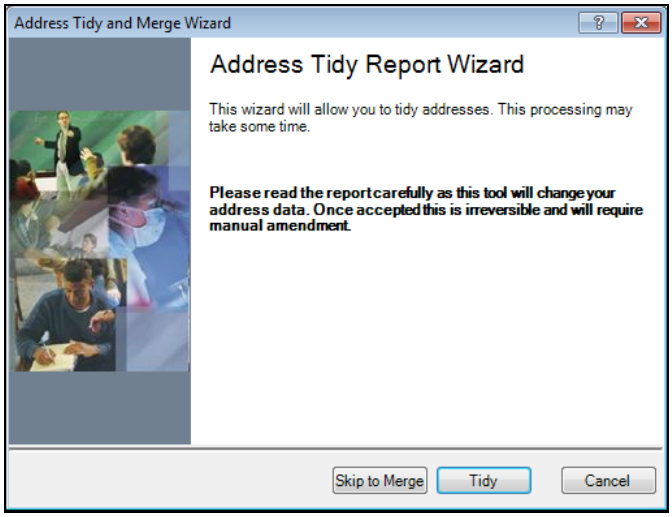
2. You must run the Tidy report before the tidy process can be run. Click the **Tidy Report** button to produce the Address Tidy report (this may take several minutes to complete).

   The report lists any incorrectly formatted addresses, together with the suggested reformat that will occur once the tidy and merge process has been run. It also shows the residents recorded as living at the address because their records are affected when the address is tidied.



WARNING: *Please check the report very carefully before clicking the* ***Tidy*** *button. The tidy process will permanently change the address data stored in SIMS. Any addresses that are incorrectly tidied will have to be manually amended.*

Once the Address Tidy report has been produced, review the content and make any required manual changes. Click the **Tidy** button to initiate the tidy process (this may take several minutes to complete).



The reports are saved to the following folder in both .html and .txt format.

`C:\Documents and Settings\<Username>\My Documents\SIMS Address Reports`

The text document also includes tables of abbreviations that are used to identify for example, that '`Drive`' might be abbreviated to '`Dr`' or '`Drv`'.

Once the tidy process has been completed, it is recommended that you run the process a second time and then run and check the Unmatchable Addresses report again. Any addresses that still feature in the list probably require some manual amendment. They may not be complete enough to identify a unique residence, or may contain non-address information that needs to be moved.

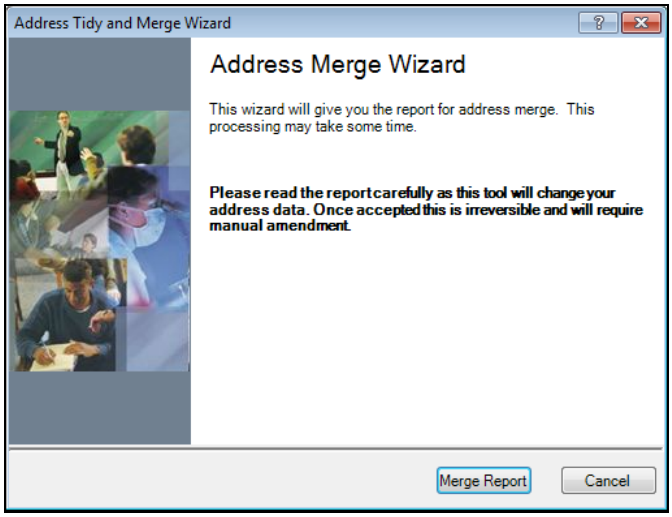
Merging Address Data

It is recommended that you run the **Unmatchable Address** report before proceeding. It is also strongly recommended that you run the Address Tidy routine (as described in the previous section) before merging address data because the tidy process increases the chances of duplicate addresses being identified.

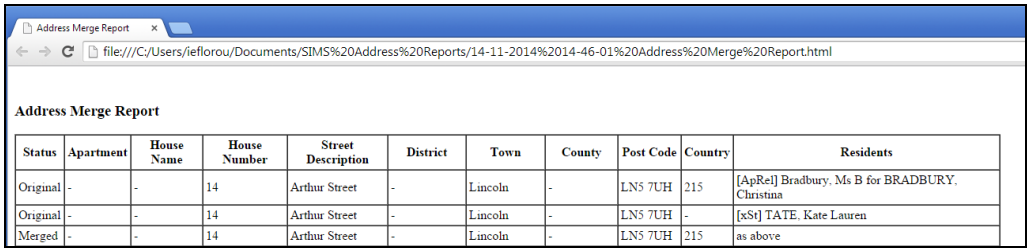
Due to the memory intensive nature of this routine, it is recommended that all other users log out of SIMS when this routine is run.

> ***IMPORTANT NOTE:*** *Please carry out a full backup of the SIMS database before running the tidy or merge routines.*

1. From the **Address Tidy and Merge** wizard, click the **Skip to Merge** button and then the **Merge Report** button to produce the Address Merge report (this may take several minutes to compile).



The report lists all duplicate addresses that will be merged into a single address, together with the residents who are recorded as living at the addresses about to be merged.



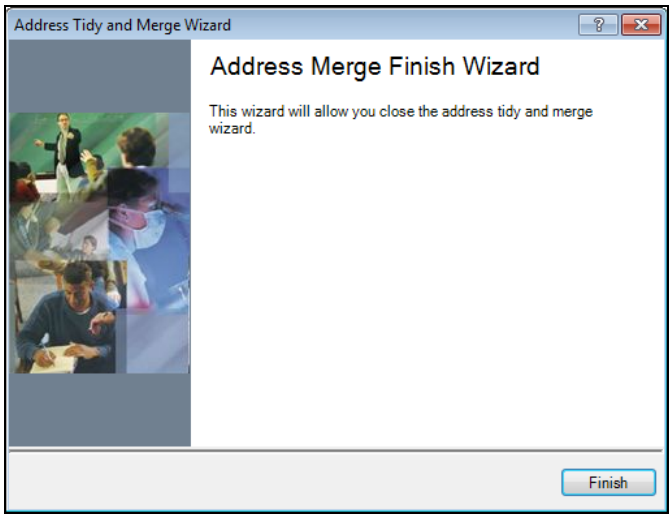
Status	Apartment	House Name	House Number	Street Description	District	Town	County	Post Code	Country	Residents
Original	-	-	14	Arthur Street	-	Lincoln	-	LN5 7UH	215	[ApRel] Bradbury, Ms B for BRADBURY, Christina
Original	-	-	14	Arthur Street	-	Lincoln	-	LN5 7UH	-	[xSt] TATE, Kate Lauren
Merged	-	-	14	Arthur Street	-	Lincoln	-	LN5 7UH	215	as above

WARNING: *Please check the report very carefully before clicking the* ***Merge*** *button. The merge process will permanently change the address data stored in SIMS. Any addresses that are incorrectly merged will have to be manually recreated.*

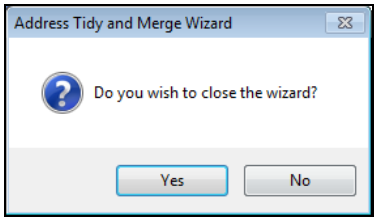
2. Once the Address Merge report has been produced, reviewed and printed, click the **Merge** button to start the merge process. This may take several minutes to complete.

The report is saved to the following folder in .html format:

`C:\Documents and Settings\<Username>\My Documents\SIMS Address Reports`



3. Click the **Finish** button to close the wizard.



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

Validating Addresses in Bulk

> *NOTE: Bulk Address Validation requires a Licence Key which can be obtained from your Local Support Unit. Only users with System Administrator, Admissions Officer or Administration Assistant permissions can carry out this process.*

In addition to validating individual addresses within SIMS, it also possible to select batches of addresses stored in SIMS to be automatically sent to the Address Validation Service for validation. For example, a School Administrator can elect to validate addresses for a specific year group, or after importing groups of pupil/students via CTF or ATF.

This is achieved by setting up a Bulk Address Validation scheduled task which is then sent to the Address Validation Service at the time specified in the task. The validated batches are then returned, enabling you to choose which existing addresses should be replaced with the validated address. The scheduled task must be set up before Bulk Address Validation can be run.

IMPORTANT NOTE: *Overseas addresses cannot be validated. For national security reasons, BFPO addresses cannot be validated by any Address Validation Service.*

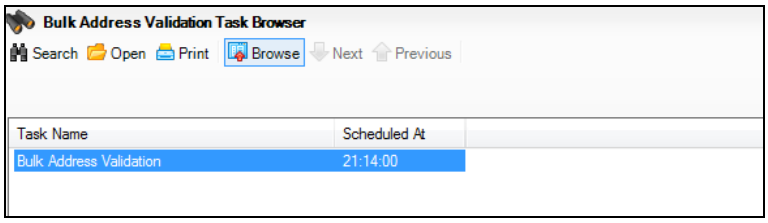
Adding/Editing a Scheduled Task for Bulk Address Validation

Before being able to use the Bulk Address Validation functionality, you must firstly create a scheduled task. The task can be set up from any SIMS workstation, but the scheduled task itself is created on the SIMS SQL Server.

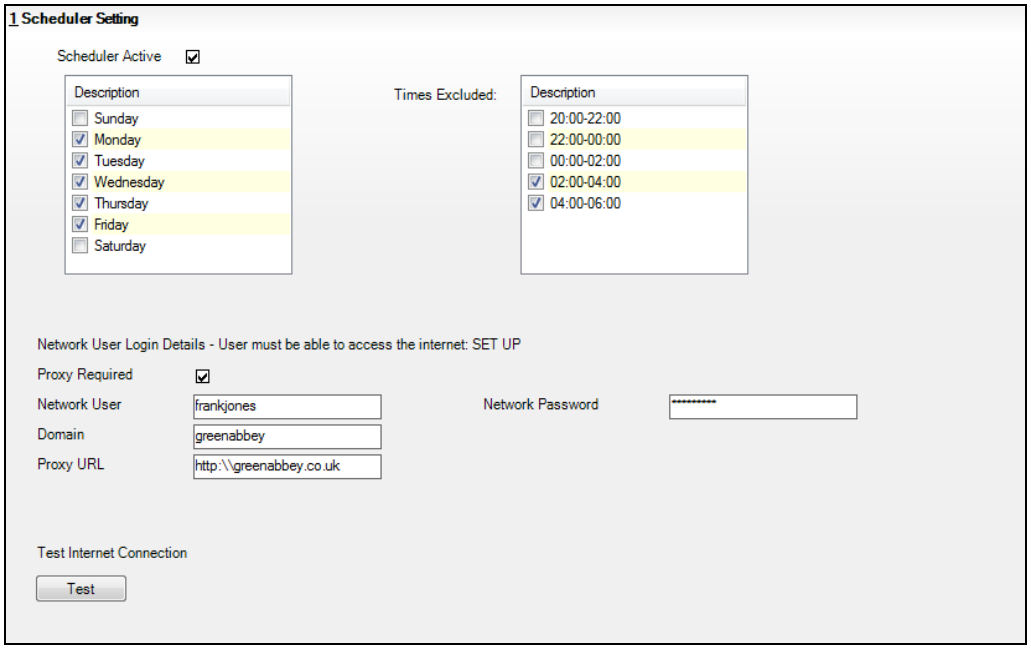
Once set up, the scheduled task will run at the time specified until it is de-activated or the details of the task are amended.

For security reasons, it is recommended that a new network user is created specifically to set up the scheduled task.

1. Select **Tools | Housekeeping | Bulk Address Validation Scheduler** to display the **Bulk Address Validation Task** browser.



2. Click the **Search** button then double-click the **Bulk Address Validation** task to display the **Bulk Address Validation Scheduler** page.



3. In the **Scheduler Setting** panel, specify the day of the week on which the scheduled task should be run by selecting the applicable day check box.

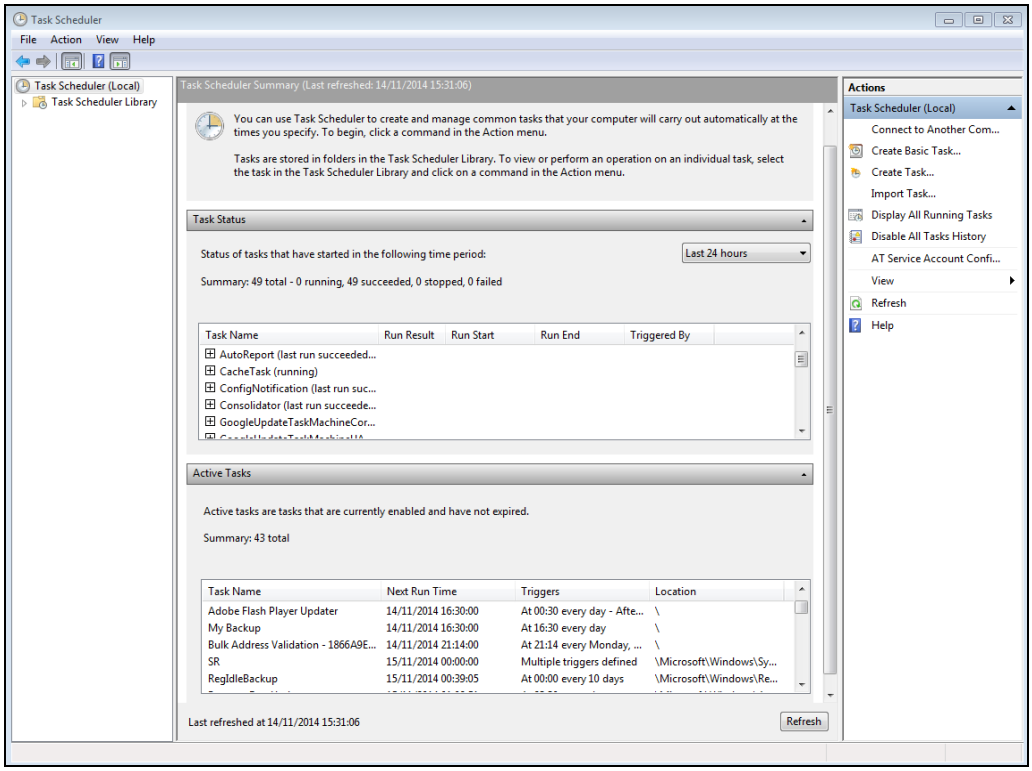
4. Address batches can be sent to the Address Validation Service between 8pm and 6am. This ensures that school's network is not affected during the working day, and that other SIMS users can validate single addresses during this time. The **Times Excluded** section enables you to specify any periods of time when the address batches should not be sent for validation by selecting the required check boxes. At least one period of time must remain deselected to enable the address batches to be sent for validation.
5. If a proxy server is in use, select the **Proxy Required** check box and complete the **Network User** and **Network Password** of the network user accessing the proxy server. Add the **Domain** name and **Proxy URL** address.

   NOTE: To enable you to access external services such as the Address Validation Service through the safety of a protected internet connection, you can specify the location of a default proxy server to filter requests and protect the integrity of your secure network. It is the responsibility of schools to ensure that credentials are managed correctly to prevent unauthorised access.
6. Click the **Test** button to test the internet connection.
7. Ensure the **Scheduler Active** check box is selected if you want the scheduled task to run at the next available scheduled time.
8. Click the **Save** button on the toolbar to save the scheduled task. The updated details are then displayed in the **Bulk Address Validation Task** browser.

   *NOTE: A random time is displayed in the **Scheduled At** column. This random time will change each time the scheduled task is amended and saved.*

   If the scheduled task is not amended or de-activated, it will continue to run as specified.
9. To check that the scheduled task has been successfully created, from the SIMS SQL Server machine, select **Start | All Programs | Accessories | System Tools | Task Scheduler** to display the **Task Scheduler** window.

In the **Active Tasks** panel, the task is displayed as **Bulk Address Validation** followed by a string of numbers under the **Task Name** heading, as shown in the following graphic.



If the task is not visible, check that the **Scheduler Active** check box has been selected and resave if necessary.

Creating Batches of Addresses for Validation

Once the Address Validation Schedule Task has been set up (as described in the previous section), batches of addresses can be sent to Address Validation Service. Batches can include addresses from different address categories including the following:

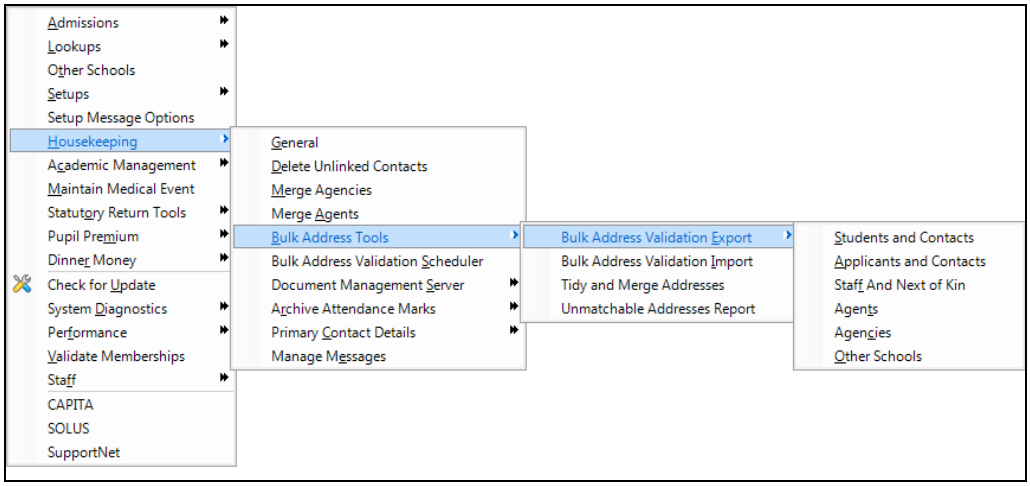
- Students and contacts
- Applicants and contacts
- Staff and next of kin
- Agents
- Agencies
- Other Schools

It is strongly recommended that the Tidy and Merge Address routines are run prior to creating address batches for export to the Address Validation Service. This ensures that the addresses contained in the batches are uniformly formatted and that duplicates have been removed thus increasing the chances of successful validation using the Address Validation Service.

NOTE: Only addresses that have not been previously validated are made available for selection. Previous addresses will not be included. Addresses in Northern Ireland and other overseas addresses are included in the address batch but these addresses will not be validated by the Bulk Address Validation Service.

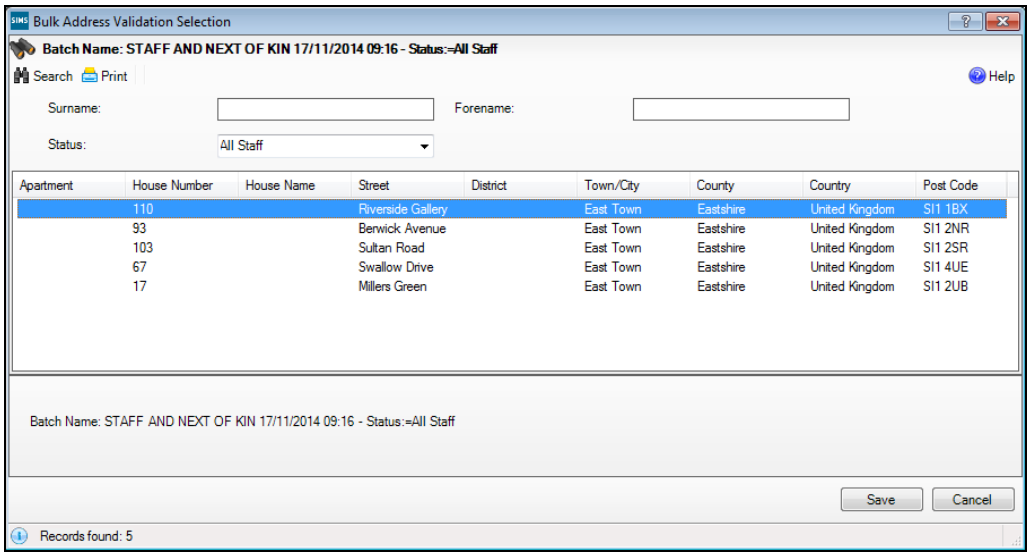
It is possible for address batches to contain large numbers of addresses that require validating. If an address batch contains more than 1000, the scheduled task will continue to send the batch to the Address Validation Service until all the addresses in the batch have been validated.

1. Select **Tools | Housekeeping | Bulk Address Tools | Bulk Address Validation Export** followed by the address category, e.g. **Staff And Next of Kin**.

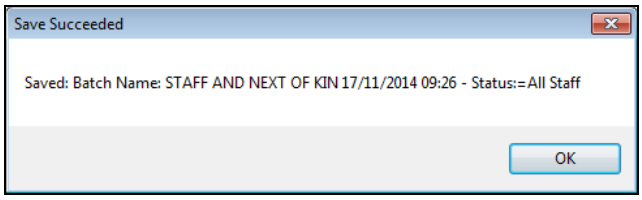


2. The **Bulk Address Validation Selection** browser is displayed. Click the **Search** button.

   With the exception of Students and Contacts, all available addresses are immediately displayed. For Students and Contacts, the number of addresses returned can be restricted using the applicable search fields and drop-down list. For example, you could run batches of addresses for each **Year Group**.



3. Once the required addresses are displayed, click the **Save** button to save the address batch. Please check that this is the batch you wish to add as once created, batches cannot be deleted.



4. A message is displayed showing the name of the created batch, together with the date and time created.

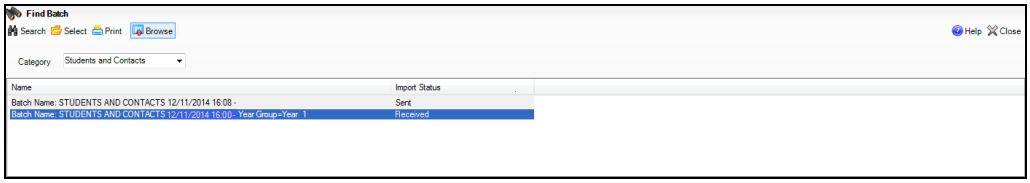
   Once saved, the address batch is sent to the Address Validation Service at the time specified in the Address Validation Scheduled Task.

Reviewing and Matching Validated Addresses

Once the validated address batch has been received back from the Address Validation Service, the validated addresses must then be matched with the existing addresses in SIMS.

Once matched, the records of all the people living at the matched address are updated.

1. Select **Tools | Housekeeping | Bulk Address Tools | Bulk Address Validation Import** to display the **Find Batch** browser.



2. Select the required address **Category** from the drop-down list then click the **Search** button.

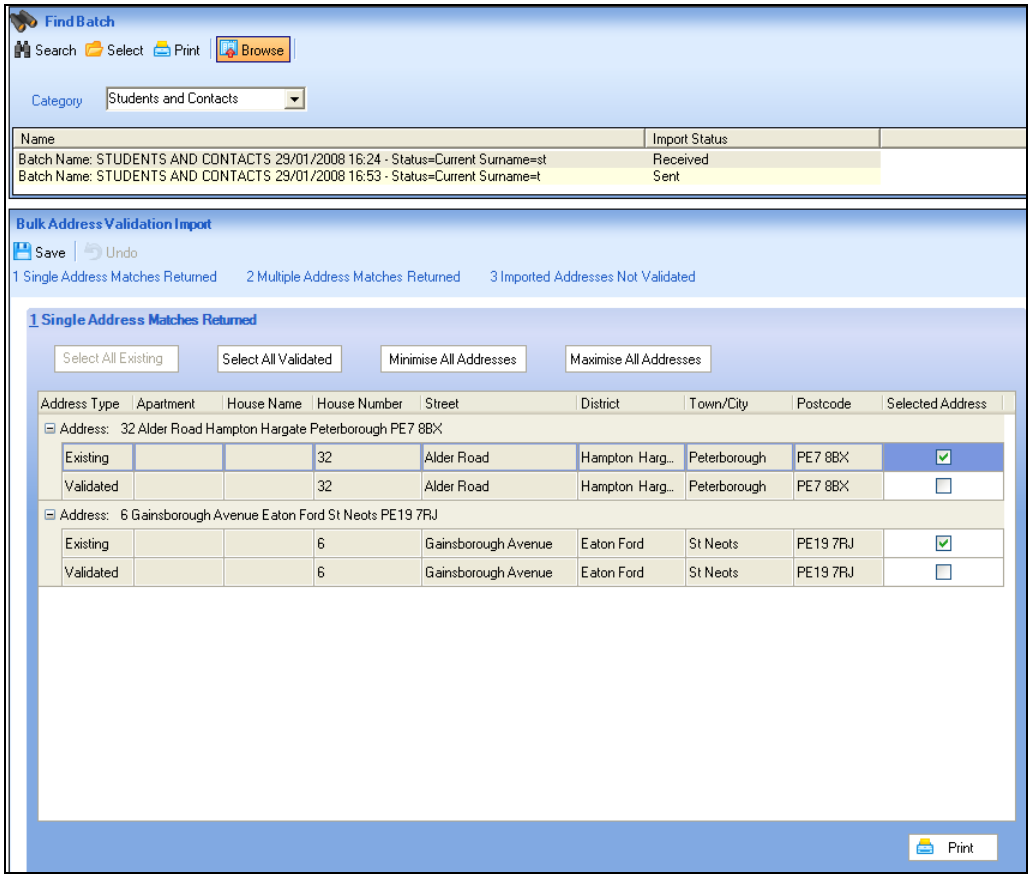
   Any previously created address batches for the selected address category are displayed.

   Each address batch has a unique **Name** that describes the contents of the batch and when it was created, e.g. `Students and Contacts 12/11/14 16.00 - Status=Current Year Group=Year 1`. The batch highlighted in the previous graphic shows that it contains address details for `Students and Contacts in Year Group 1` and that it was created on the `12/11/14` at `16:00`.

   The **Import Status** is also displayed. A status of **Received** indicates that the address batch has been sent to Address Validation Service, validated and received back at the school. A status of **Sent** indicates that the address batch has been created and is sent for validation on the day and time specified in the Bulk Address Validation scheduled task.

> *NOTE: Batches containing over 1000 addresses will continue to show a status of **Sent** until all the addresses contained within the batch have been validated.*

3. Highlight the required address batch with an **Import Status** of **Received** then click the **Select** button to display the **Bulk Address Validation Import** page.



The **Bulk Address Validation Import** page contains three different panels showing how the addresses have been validated:

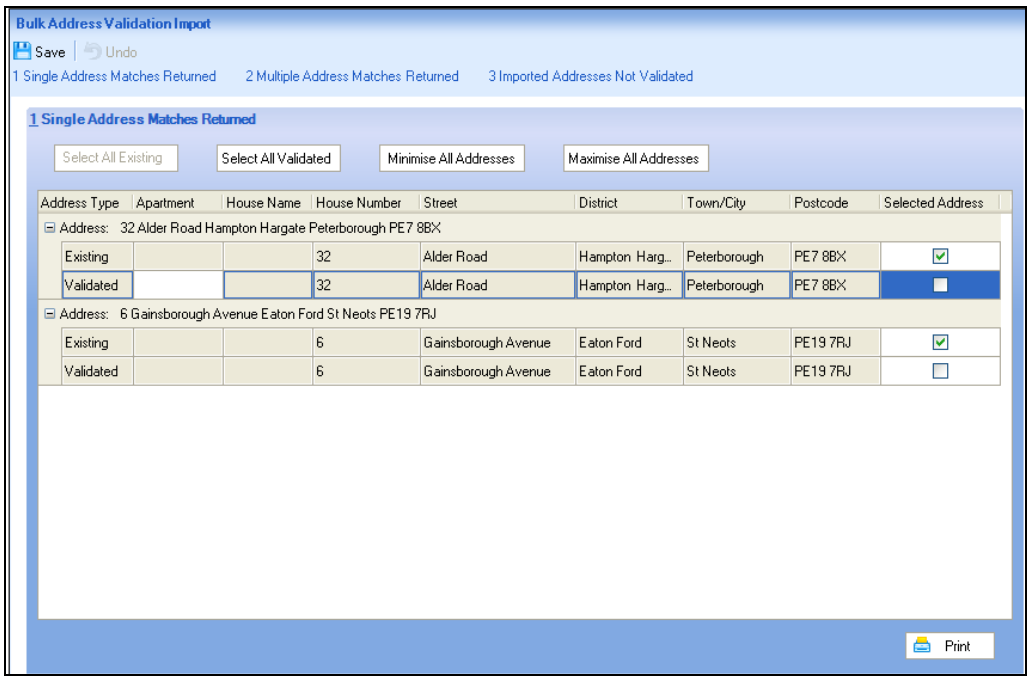
Single Address Matches Returned panel – lists addresses in SIMS that have been successfully matched with a single validated address.

Multiple Address Matches Returned panel – lists addresses in SIMS that could be a match for more than one validated address.

Imported Addresses Not Validated panel – lists any addresses that were unable to be validated.

Matching Single Addresses

The **Single Address Matches Returned** panel lists address in SIMS that have been successfully matched with a single validated address.



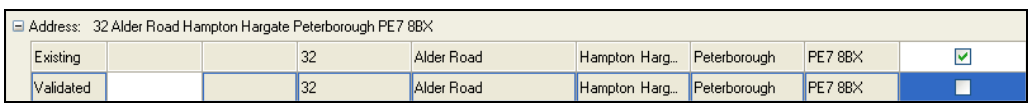
The addresses are listed in pairs. Each pair of addresses contains the **Existing** address and the **Validated** address based on the House Name/House Number and Postcode.

After reviewing the details in the **Single Address Matches Returned** panel, a decision must be made whether to overwrite all the existing addresses with validated addresses or to overwrite only selected addresses.

> *NOTE: Address lines can be minimised to show just the address by clicking the – icon adjacent to each address. Alternatively, click the **Minimise All Addresses** button to minimise the display for all addresses. Maximise the display again by clicking the **+** icon adjacent to each required address or clicking the **Maximise All Addresses** button.*

Matching Addresses Individually

1. To match addresses individually, for each address pair, select the **Selected Address** check box in either the **Existing** row (to retain the address in SIMS) or the **Validated** row (to overwrite the existing address with the validated address).



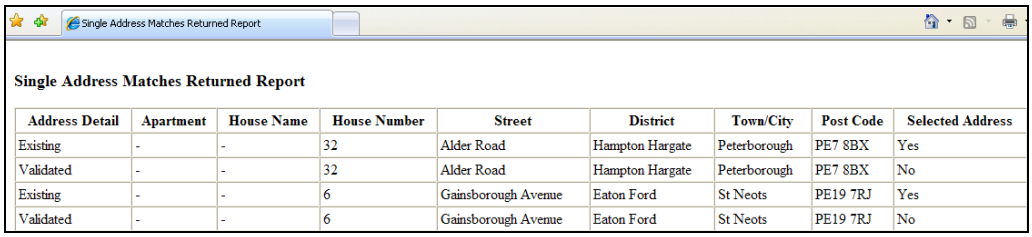
2. Repeat for each address pair listed in the **Single Address Matches Returned** panel.
3. Click the **Save** button to match the addresses as per your selections.

Matching All Addresses

1. To retain all existing addresses, click the **Select All Existing** button. To retain all the validated addresses, click the **Select All Validated** button. This will automatically select all the applicable check boxes in the **Selected Address** column.
2. Click the **Save** button to match the addresses as per your selections.

Printing Your Selections

If you want to retain a list of the selections made, click the **Print** button to produce a Single Address Matches Returned report displayed in your web browser.


Single Address Matches Returned Report

Single Address Matches Returned Report

Address Detail	Apartment	House Name	House Number	Street	District	Town/City	Post Code	Selected Address
Existing	-	-	32	Alder Road	Hampton Hargate	Peterborough	PE7 8BX	Yes
Validated	-	-	32	Alder Road	Hampton Hargate	Peterborough	PE7 8BX	No
Existing	-	-	6	Gainsborough Avenue	Eaton Ford	St Neots	PE19 7RJ	Yes
Validated	-	-	6	Gainsborough Avenue	Eaton Ford	St Neots	PE19 7RJ	No

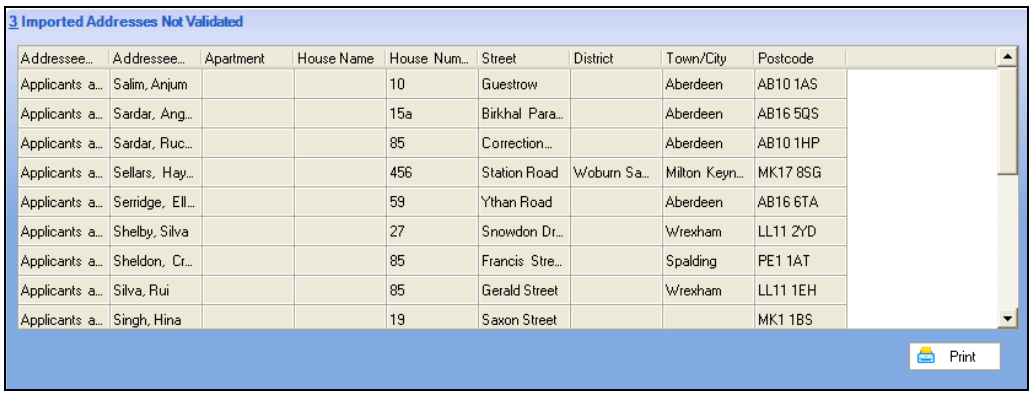
Matching Multiple Addresses

The **Multiple Address Matches Returned** panel lists addresses in SIMS that could be a match for more than one validated address returned by the Address Validation Service. This may be because the address is that of a building that has been divided into flats, all with the same Post Code. It may also be due to insufficient address information such as missing District, Country, etc.

1. In the **Selected Address** column, select the check box adjacent to the most likely matched address. Click the **Save** button to apply the changes.
2. Click the **Print** button to produce an html output of the Multiple Address Matches Returned report.

Addresses That Could Not be Validated

The **Imported Addresses Not Validated** panel displays any addresses that could not be validated. This information is read-only.

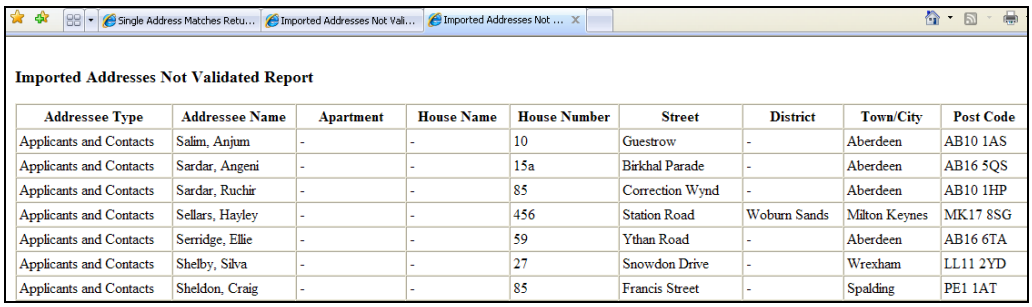

3 Imported Addresses Not Validated

Addressee...	Addressee...	Apartment	House Name	House Num...	Street	District	Town/City	Postcode
Applicants a...	Salim, Anjum			10	Guestrow		Aberdeen	AB10 1AS
Applicants a...	Sardar, Ang...			15a	Birkhal Para...		Aberdeen	AB16 5QS
Applicants a...	Sardar, Ruc...			85	Correction...		Aberdeen	AB10 1HP
Applicants a...	Sellars, Hay...			456	Station Road	Woburn Sa...	Milton Keyn...	MK17 8SG
Applicants a...	Serridge, Ell...			59	Ythan Road		Aberdeen	AB16 6TA
Applicants a...	Shelby, Silva			27	Snowdon Dr...		Wrexham	LL11 2YD
Applicants a...	Sheldon, Cr...			85	Francis Stre...		Spalding	PE1 1AT
Applicants a...	Silva, Rui			85	Gerald Street		Wrexham	LL11 1EH
Applicants a...	Singh, Hina			19	Saxon Street			MK1 1BS

Print

> *NOTE: Addresses in Northern Ireland and other overseas addresses cannot be validated.*

Click the **Print** button to produce an html output of the Imported Addresses Not Validated report displayed in your web browser.



Imported Addresses Not Validated Report

Addressee Type	Addressee Name	Apartment	House Name	House Number	Street	District	Town/City	Post Code
Applicants and Contacts	Salim, Anjum	-	-	10	Guestrow	-	Aberdeen	AB10 1AS
Applicants and Contacts	Sardar, Angeni	-	-	15a	Birkhal Parade	-	Aberdeen	AB16 5QS
Applicants and Contacts	Sardar, Ruchir	-	-	85	Correction Wynd	-	Aberdeen	AB10 1HP
Applicants and Contacts	Sellars, Hayley	-	-	456	Station Road	Woburn Sands	Milton Keynes	MK17 8SG
Applicants and Contacts	Serridge, Ellie	-	-	59	Ythan Road	-	Aberdeen	AB16 6TA
Applicants and Contacts	Shelby, Silva	-	-	27	Snowdon Drive	-	Wrexham	LL11 2YD
Applicants and Contacts	Sheldon, Craig	-	-	85	Francis Street	-	Spalding	PE1 1AT

If the address batch contains only overseas addresses and therefore, no addresses that could be matched, click the **Remove** button to delete the entire batch. If this is the case, the **Save** button remains greyed out.

Viewing the Bulk Address Validation Log File

The first time an address batch is received from the Address Validation Service, a `LogFile.txt` file is created in the `Binn` folder of your SQL installation. This will typically be in the following location:

```
C:\Program Files\Microsoft SQL
Server\MSSQL11.SIMS2012\MSSQL\Binn
```

Each subsequent time a batch is received, an additional entry is appended to the `LogFile.txt` listing the **Date**, the **Time**, the ID of the **Computer** importing the batch, together with any **Message(s)**. The **Messages** might show the number of addresses that have been validated successfully or an error message advising why the validation failed.

Double-click the file to view the contents.

Maintaining Orphaned Documents

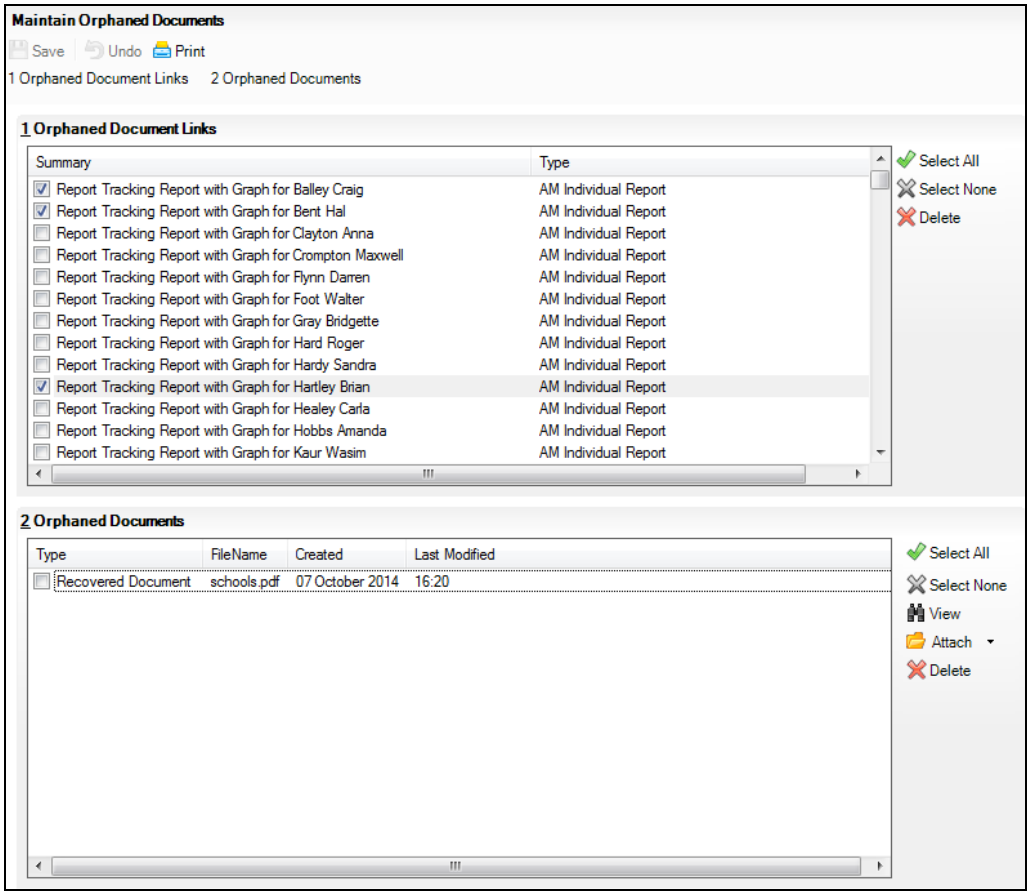
> *NOTE: This functionality is available to School Administrators only.*

The Document Management Server has the capacity to contain a large number of diverse documents, from individual profiles and assessment reports, through to general letters to parents. It is also possible that documents may become detached from their link to a person or organisation, making it impossible to trace documents back to their original source. This may occur because:

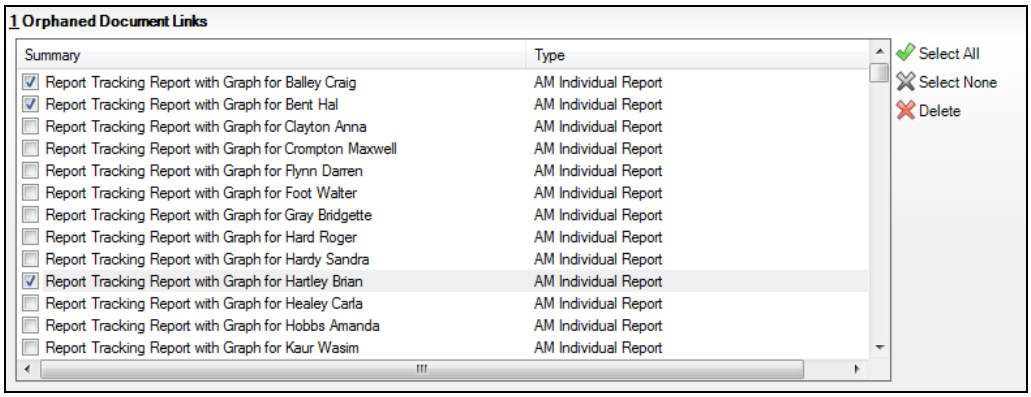
- The DMS was down when the document was selected for deletion such that only the link to the document was removed.
- Profiles and individual assessment reports have been superseded by a later version, but earlier versions still remain.

Such documents are referred to as orphaned documents. It is now possible to restore, recover (where possible) or delete orphaned documents.

1. Select **Tools | Housekeeping | Document Management Server | Maintain Orphaned Documents** to display the **Maintain Orphaned Documents** page.

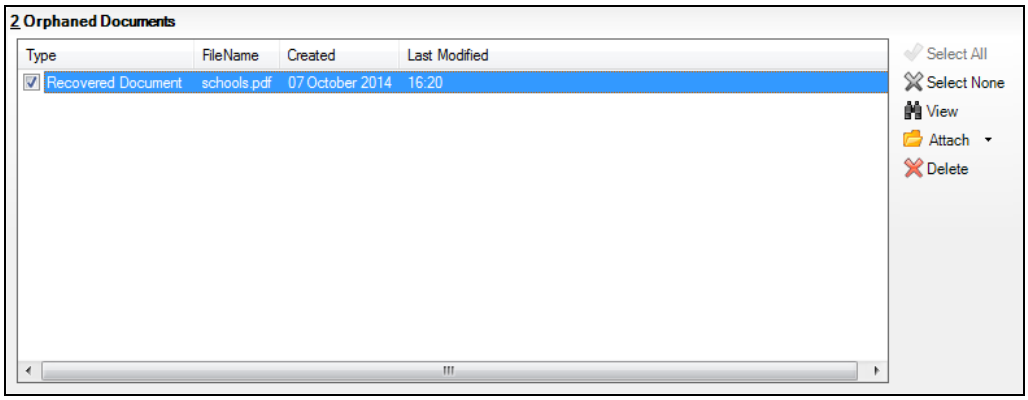


The **Orphaned Document Links** panel displays a list of any links that no longer have documents attached to them.

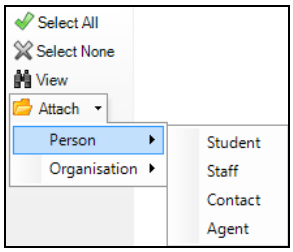


2. Because the documents are no longer stored on the DMS, the links cannot be restored and therefore need to be removed. This is achieved by clicking the **Select All** button, then clicking the **Delete** button. Alternatively, individual links can be removed by selecting the adjacent check box, then clicking the **Delete** button.

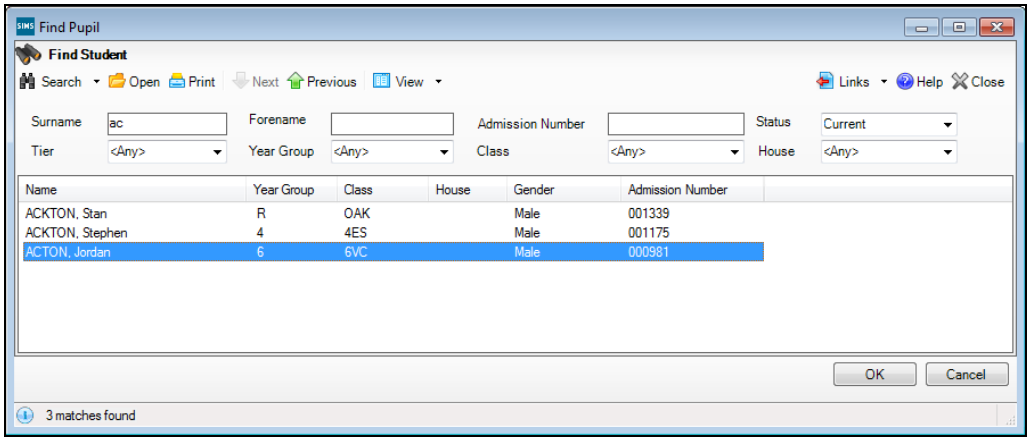
3. The **Orphaned Documents** panel displays any orphaned documents that are no longer linked to their original source. These documents are still stored on the DMS and as such, can often be re-attached to their original source if sufficient information is available.



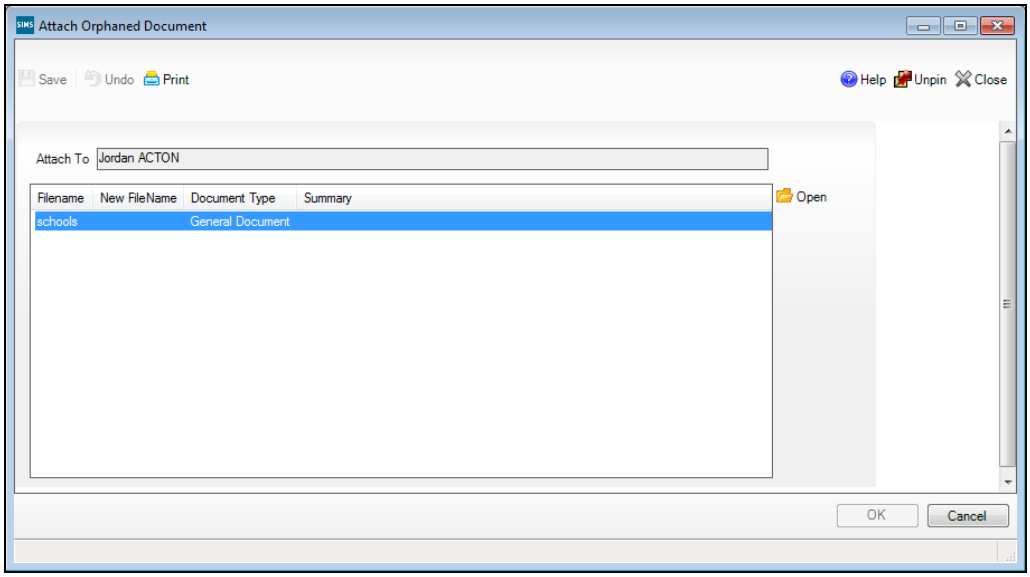
4. Select the check box adjacent to an individual orphaned document and click the **View** button to display the document contents. From the information contained in the document, it may be possible to determine the record the document was originally attached to.
5. If sufficient information has been found to enable the document to be re-attached to its original source, click the **Attach** button and select the appropriate option from the drop-down list, e.g. **Person | Student**.



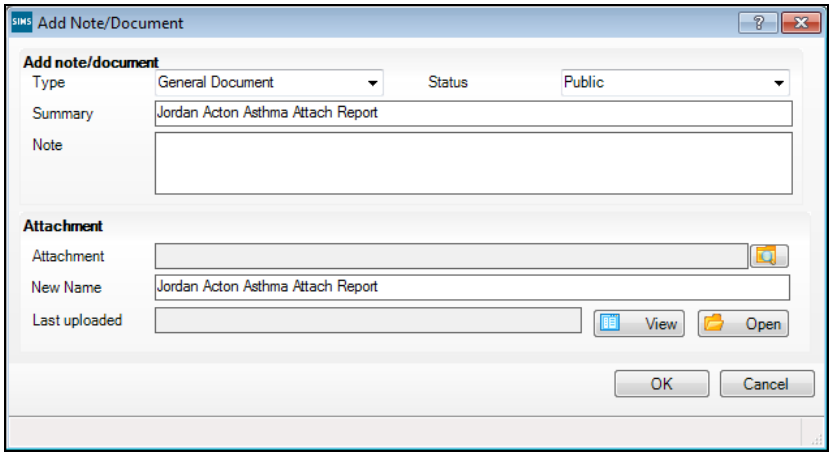
6. The applicable browser is displayed enabling you to select the required person or organisation. For example, selecting **Person | Student** displays the **Find Pupil** (or **Student**) browser.



7. Search for and select the required person or organisation then click the **OK** button to select them/it and display the **Attach Orphaned Document** dialog.



8. Highlight the filename of the orphaned document then click the **Open** button to display the **Add Note / Document** dialog.



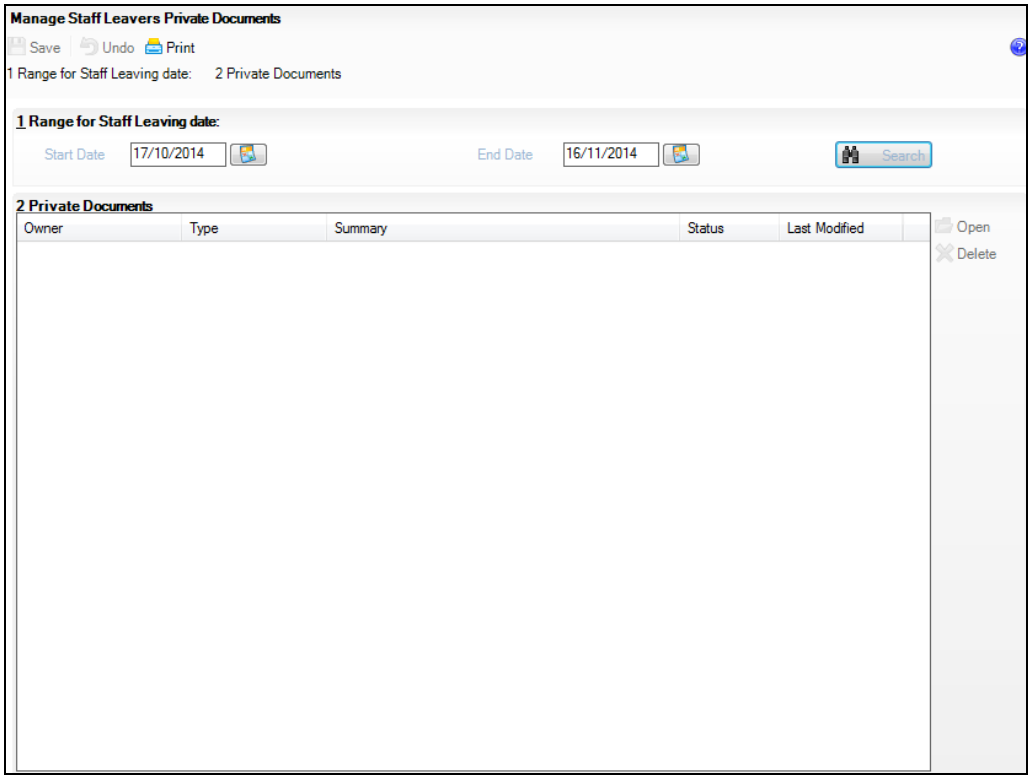
9. Ensure that the **Type** is selected from the drop-down list and that a clear and concise **Summary** is entered.
10. Select the **Status** of the document from the drop-down list as per the following options:
    - **Public** – the document is available to all users with sufficient add/view/edit document permissions.
    - **Private** – the document is available only to you.
    - **Confidential** – the document is available to SIMS users with School Administrator or Senior Management Team permissions.
11. Enter a **Note** that clearly describes the contents of the document. This may help in future if the document subsequently becomes orphaned.

12. Enter a New Name for the document and click the **OK** button to return to the **Attach Orphaned Document** dialog.
13. Click the **Save** button on the **Attach Orphaned Document** dialog to re-attach the document.
14. Click the **OK** button to return to the **Maintain Orphaned Documents** page and repeat for any remaining orphaned documents.
15. Click the **Save** button on toolbar to complete the process.

Maintaining Private Documents of Staff Leavers

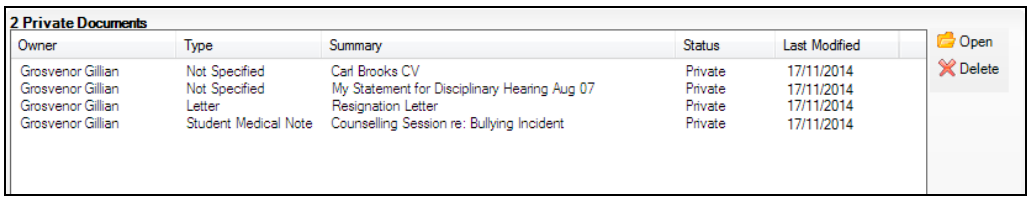
When staff leave your school, they may have attached documents within SIMS that have been marked as **Private**. As a consequence, no one else is able to access these documents. This function enables School Administrators to identify such documents, view their content if required then either delete the documents or amend the status to **Public** or **Confidential**.

1. Select **Tools | Housekeeping | Document Management Server | Maintain Private Documents of Staff Leavers** to display the **Maintain Staff Leavers Private Documents** page.

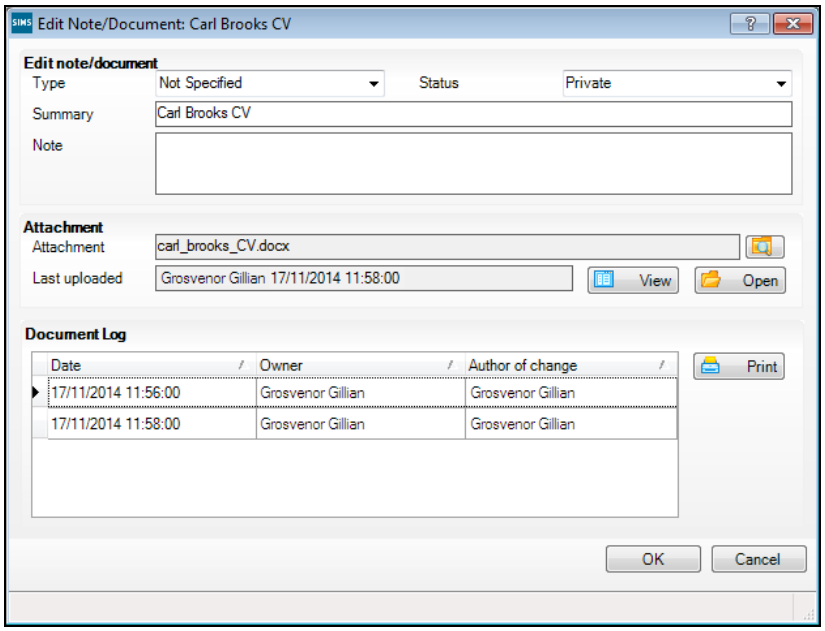


The **Start Date** and **End Date** default to dates to cover the last rolling month. These dates can be manually edited by entering required dates in dd/mm/yyyy format or by clicking the **Calendar** button and selecting the required date.

2. Click the **Search** button to display any documents marked as private for staff who have left in the **Private Documents** panel.

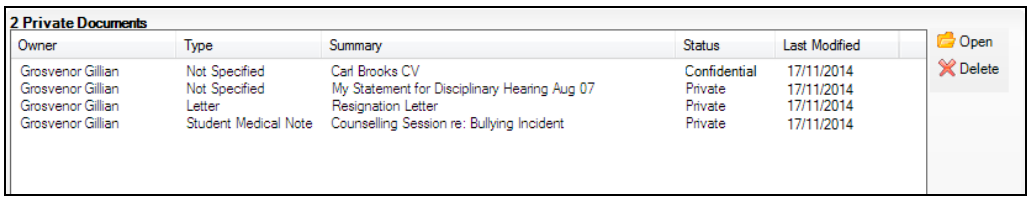


3. If you are sure that the document is no longer required, highlight the document name and click the **Delete** button to remove it.
4. To view more detail of the document, select the document name then click the **Open** button to display the **Edit Note / Document** dialog.



5. If you wish to retain the document and make it available to other users, you must select a different value from the **Status** drop-down list. The alternative values are either **Public** (available to all SIMS users who have permissions to access the areas where the document is stored) or **Confidential** (available to users with School Administrator or Senior Management Team permissions only).
6. If you want to check the content, the document can be viewed by clicking the **View** button.
7. A copy of the document log can be printed by clicking the **Print** button in the **Document Log** panel. The log includes the date and time the document was uploaded, the owner of the document and the name of any user who edited the document.

8. Click the **OK** button to save any **Status** change and return to the **Manage Staff Leavers Private Documents** page.



9. Any change in status is reflected in the **Status** column. Click the **Save** button on the toolbar to save any changes.

Tidying the Content of a User's Mailbox

Applicable to users with System Manager permissions only

The System Manager can delete messages sent to other SIMS users, to help to prevent mailbox full warnings from being displayed. You may also choose to include this as part of your general SIMS housekeeping process, to tidy the mailbox of all members of staff (current and leavers). Once messages have been deleted they are recorded in the audit log, so a record of deleted messages can be maintained. The log can be exported, if required.

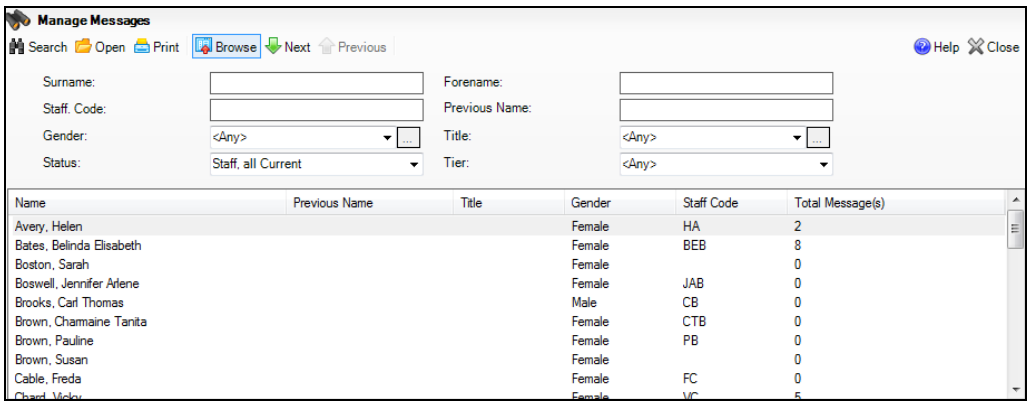
*NOTES: This process deals solely with the deletion of messages received by a SIMS user (i.e. messages in a user's mailbox, accessible from the **My Messages** panel on the SIMS **Home Page**. It does not delete messages from a user's Sent Items list (accessible from **Focus | Alerts | General Messages**).*

For privacy reasons, it is not possible to read the content of the messages displayed.

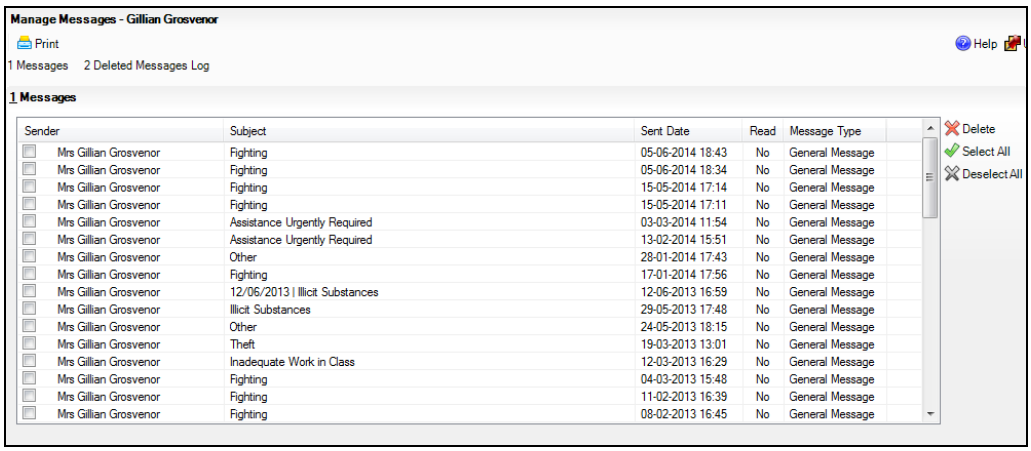
***WARNING:** This process is irreversible and therefore it must be carried out with caution. Any messages that have been deleted cannot be retrieved.*

1. Select **Tools | Housekeeping | Manage Messages** to display the **Manage Messages** browser.
2. Enter any combination of the staff member's **Surname**, **Forename**, **Staff. Code** and **Previous Name**. Additional search criteria is available from the drop-down lists. Alternatively, leave the search criteria blank if you do not wish to apply a filter.

3. Click the **Search** button to display all members of staff who match the search criteria specified. The **Total Message(s)** column displays the total number of messages in a user's mailbox (i.e. an aggregate of unread and read messages).



4. Highlight the user whose messages you wish to tidy then click the **Open** button to display the **Manage Messages** page.



The **Messages** panel displays all the messages that are currently held in the selected user's mailbox. The **Sender**, the **Subject** line, the **Sent Date**, an indication of whether or not the message has been **Read** and the **Message Type** are displayed for each message.

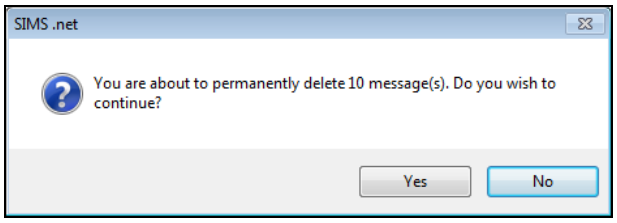
The content of the **Messages** panel can be printed, if required.

> *TIPS: Before printing, ensure that the width of the columns is set appropriately because the column width selected on-screen will be mirrored on the printed output. For the same reason, also ensure that the sort order displayed on-screen is appropriate for the printed output.*
>
> *You are advised to produce the output in landscape format to ensure that all the fields displayed on-screen are included on the output.*
>
> *The content of the **Deleted Messages Log** panel, described later in this topic, is also printed on the same output.*

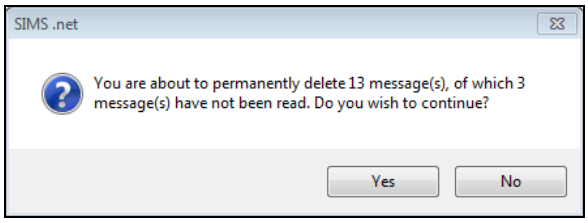
To print the list of messages, select the check box adjacent to each message you wish to include on the output then click the **Print** button to display the standard Windows® **Print** dialog. Select the appropriate print options then click the **OK** button to produce the output.

5. Select the check box adjacent to each message you wish to delete. Alternatively, use **Shift + click** or **Ctrl + click** to select a block of messages or selective messages respectively. Additionally, the **Select All** button and the **Deselect All** button can be used for global selection and deselection.
6. Click the **Delete** button. You are prompted to confirm the deletion of the selected message(s).

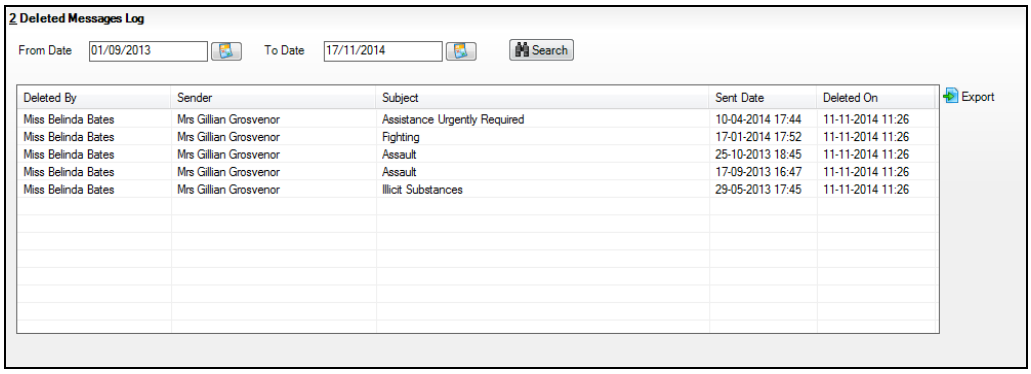
   If you have selected to delete one or more read messages, the following message is displayed.



If you have selected to delete one or more messages, including at least one unread message, the following message is displayed.



7. Click the **Yes** button to delete the selected message(s). The deleted message(s) are displayed in the **Deleted Messages Log** panel.



The **Deleted Message Log** panel, which acts as an audit log, displays all the messages that have been deleted from the selected user's mailbox until the log is exported in .XML format, at which time the log is cleared. The user who deleted the message (**Deleted By**), the **Sender**, the **Subject** line, the **Sent Date** and the date on which the message was deleted (**Deleted On**) are displayed for each message.

8. The display of deleted messages defaults to the first day of the current academic year (**From Date**) to today's date (**To Date**) but can be changed by clicking the respective **Calendar** buttons and selecting the required dates. If you change either or both of the dates, click the **Search** button to refresh the display of deleted messages.

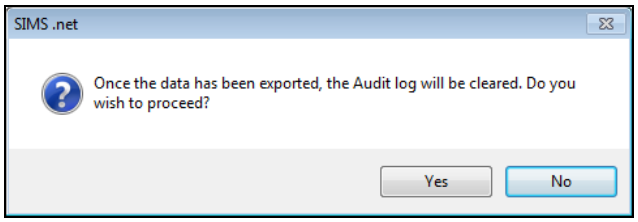
   The content of the **Deleted Messages Log** panel can be printed, if required.

   > *TIPS: Before printing, ensure that the width of the columns is set appropriately because the column width selected on-screen will be mirrored on the printed output. For the same reason, also ensure that the sort order displayed on-screen is appropriate for the printed output.*
   >
   > *You are advised to produce the output in landscape format to ensure that all the fields displayed on-screen are included on the output.*
   >
   > *The content of the **Messages** panel, described earlier in this topic, is also printed on the same output.*

   To print the list of messages, click the **Print** button to display the standard Windows® **Print** dialog. Select the appropriate print options then click the **OK** button to produce the output.

   The audit log can be exported in .XML format. Once the log has been exported, it will be removed from the **Deleted Messages Log** panel.

9. Click the **Export** button to export the audit log. You are prompted to confirm the export and you are advised that once the data has been exported, the audit log will be cleared.



10. Click the **Yes** button to display the standard Windows® **Save As** dialog.
11. Navigate to the required location and enter a **File name**. The file type defaults to .XML and cannot be changed.
12. Click the **Save** button to save the output and to remove all messages from the **Deleted Messages Log** panel.

Changing Ownership of a Report

With the required permissions, it is possible to change the allocation of a report (whether **Public** or **Private** status) from one staff member to another. This is particularly useful if, for example, a staff member who is the owner of a report leaves the school.

1. Select **Reports | Design Report**, then click **Open an existing report** to display the **Report Browser** and expand the Owners folder.
2. Select the current owner of the report that is to be re-assigned. This displays all the reports that they own.

3. Hold the **Ctrl** key to select multiple individual reports, or hold the **Shift** key to select a block of reports. Click and drag the relevant report(s) into the folder of the new owner.
4. A warning message displays to confirm the re-assignment. Click the **Yes** button to continue. Clicking the folder of the new owner now displays the re-assigned report(s), and the **Owner** column confirms that the ownership of the report has been re-assigned to that staff member.

12 | Setting Up Scheduled Reports

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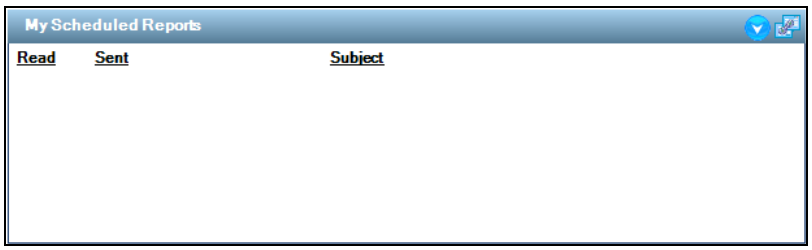
Setting up the AutoReports Scheduled Task 229
Editing the Scheduled Task Properties 234
Selecting Reports for Scheduling 236

Introduction

Scheduled reports can be set up in SIMS to automatically run at specified times. For example, Heads of Year may want to produce behaviour reports on a daily basis to keep track of any behaviour incidences. It is possible to schedule these reports to run for both yourself and on behalf of other users.

Once created, the reports are stored on the Document Management Server and a link to the report is displayed on the applicable user's Home page in their **My Scheduled Reports** panel.



In order for these reports to work, a Windows Scheduled Task must be created to run the `AutoReports.exe` which produces the scheduled reports. This Scheduled Task must be set up on the SIMS SQL Server. In addition, applicable permissions must be assigned to required users in System Manager.

Considerations

- In order to create the AutoReports Scheduled Task, you may prefer to create a network user account specifically for this purpose, together with a specific SIMS account for report scheduling.
- Any users who want to schedule their own reports, or schedule reports for others, will need both permissions to manage scheduled reports and permissions to run reports. They will also need access to any applicable data fields contained within the reports they wish to schedule.

- Consider the frequency that the AutoReports Scheduled Task will run. The frequency of the task will take precedence over the frequency set up in the scheduled reports area of SIMS. For example, if the AutoReports Scheduled Task is set to run weekly, but the scheduled report in SIMS is set to run daily, the report is run on a weekly basis. It is therefore advisable to set the AutoReports Scheduled Task to run on a daily basis to provide the maximum flexibility for other SIMS users.
- Consider the time that the AutoReports Scheduled Task will run. This will depend on the number of SIMS users who are likely to set up scheduled reports. If you have 20 SIMS users each setting up 10 reports to run each day, then the AutoReports Scheduled Task will generate 200 reports at the same time. It is therefore recommended that the task is run out of office hours, e.g. in the early hours of the morning.

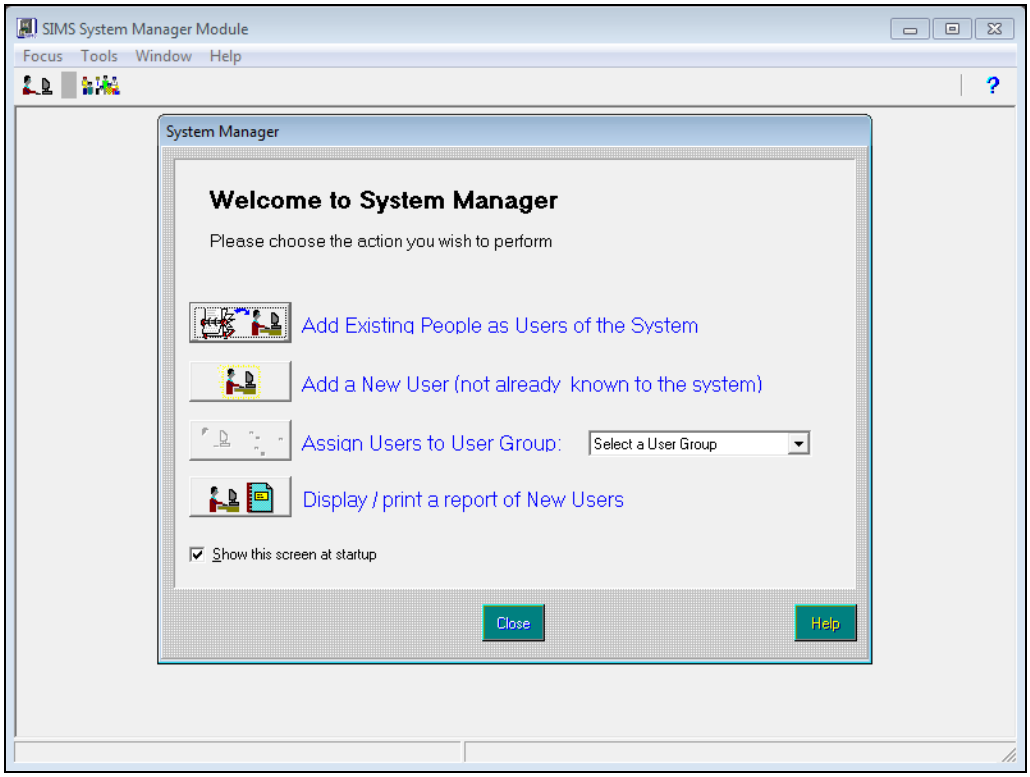
  However, this may affect the validity of the data in certain reports. For example, if a SIMS user wants to run a daily report listing pupil/students absent from morning registration, then the report must be run after such data is entered, e.g. after 9.30am. If the AutoReports Scheduled Task is set to run at 3am, then it will produce a report with data from the previous day. Therefore, consideration needs to be given to both the time that the task is set to run and the types of report that are produced.

Assigning Permissions to Execute Scheduled Reports

To enable users to **Execute the Scheduled Reports**, they require additional permissions. There are specific permissions available from the **Group Permissions | Core | Home Page** area of System Manager.

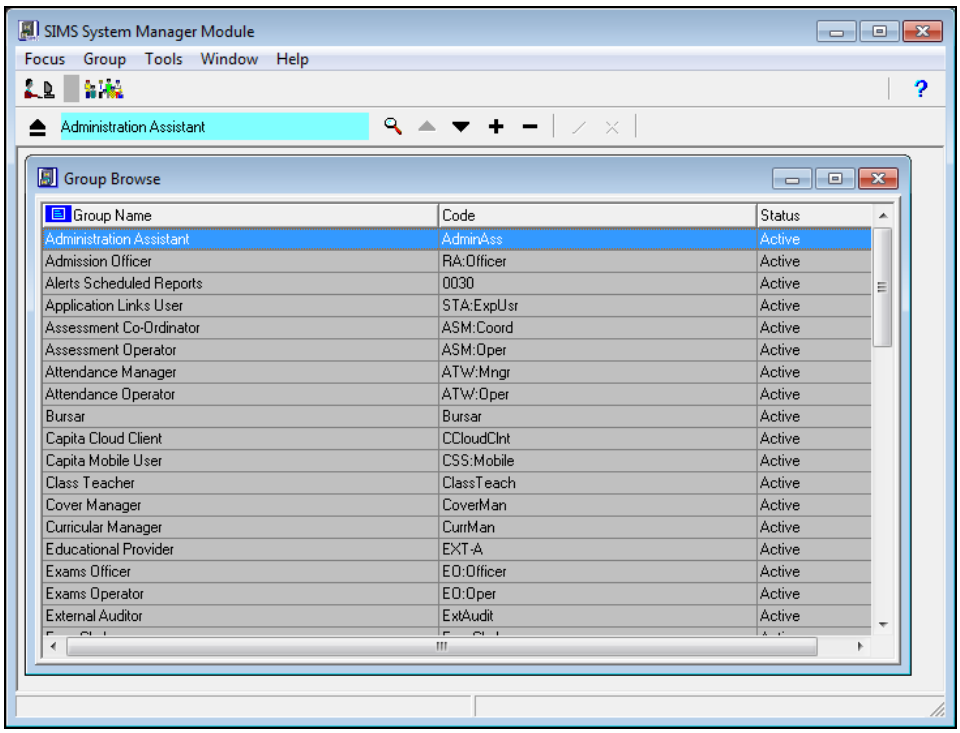
The following process describes how this can be achieved using System Manager 6.This process can also be performed using System Manager 7. For more information, please refer to the *Managing Groups* chapter of the *Managing SIMS Users, Groups and Database* handbook.

1. Select the **Focus | System Manager | System Manager 6** to open the **SIMS System Manager Module**.

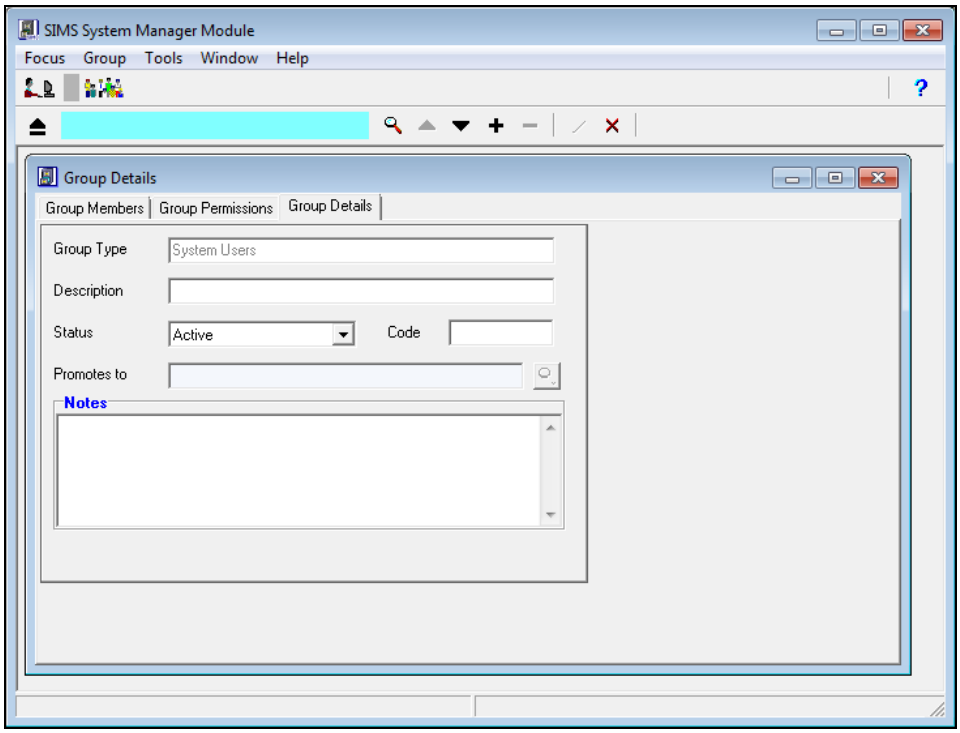


2. Click the **Close** button on the initial welcome page and click the **Group** button to display the **Group Browse** dialog.

Group button



3. Select **Group | Add Group** to display the **Group Details** dialog.



4. In the **Description** field enter a unique group name for those individuals, who will be granted access to run the AutoReports scheduler, e.g. `Alerts Scheduled Reports`.
5. Define as **Active** the **Status** of the group.

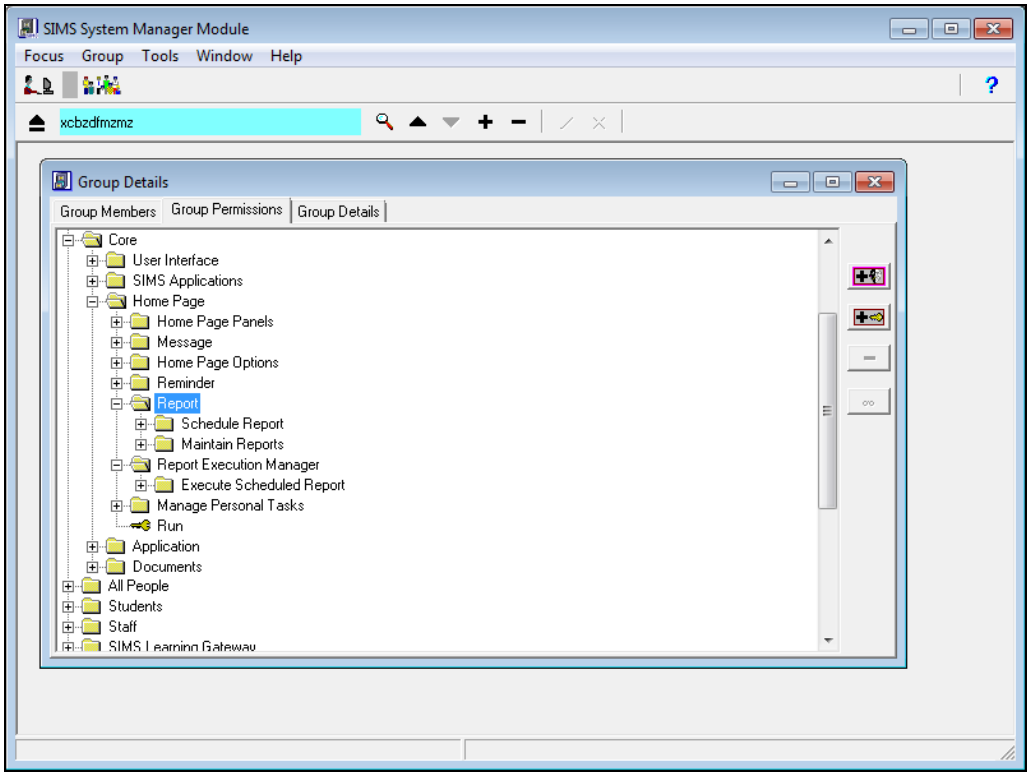
6. Enter a unique **Code**, e.g. RepSched.
7. Click the **Save** button.

Save button

8. In the **Group Permission** tab click the **Apply roles to the group** button and select the roles of the individuals who are responsible for setting up the scheduling of AutoReports, e.g. School Administrator, System Manager, etc.

Apply roles to the group button

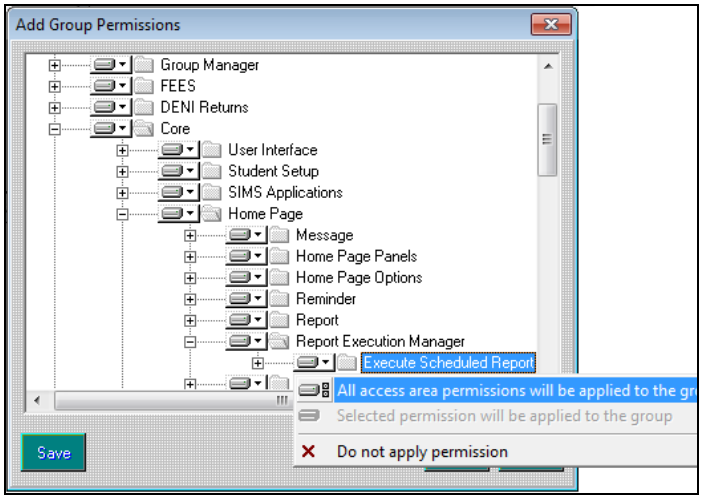
9. Click the **Save** button.
10. In the **Group Permissions** tab expand the **Core** folder and the embedded **Home Page** folder until the **Report Execution Manager** and **Execute Scheduled Report** permissions are displayed.



11. Select the **Execute Scheduled Report** permission and click the **Add permissions to the group** button to display the **Add Group Permissions** dialog.

Add permissions to the group button

12. Click the down arrow adjacent to the **Execute Scheduled Report** permission and select **All access area permissions will be applied to the group** from the options displayed.



13. Click the **Save** button to save the permissions for the new group.

Other Permissions Required

For users to run any of the scheduled reports, permissions for the following processes in SIMS is required:

- **Designing or Running a Report** - users must have sufficient access rights to design or run the existing report.
- **Document Management Server** - users must have sufficient rights to access the Document Management Server (DMS), to ensure that it is configured and running correctly. This permission is also required for running the report definitions and for storing the report outcomes on the Document Management Server.

Setting Up the Server to Run AutoReports.EXE

Scheduling tasks can be a complex activity because there is no user interface to assist you through the process. We have therefore provided processes outlined in the following sections. This method will enable you to check permissions and the progress of the setup at each step. It assumes that your server is in a domain.

Step 1

Create a Windows User Account, for example MyDomain\AutoReportsUser. This user needs access to the SQL Server hard drives, be able to log into SIMS and be a 'SIMS User' on the network. In addition to being able to access the server, this user should also be able to login to a sample workstation and run SIMS.

This user will have high level permissions to SIMS data (to ensure that all applicable reports can be run in SIMS) and hence it works better as an NT User, where the Network Administrators can manage the password and ensure that it complies with good password policies.

Step 2

1. On a workstation, login to SIMS as a System Manager and run the System Manager application.
2. Create a new user for the MyDomain\AutoReportsUser. Ensure that the user name is `MyDomain\AutoReportsUser`.
3. Grant this user access to all of the permission groups. The reason for this is that this user may be asked to produce reports for every SIMS user in the school and will therefore need access to all the data in SIMS in order to successfully produce the reports.

> ***IMPORTANT NOTE:*** *For obvious reasons, the compromise of this user's password would lead to a significant security issue within the school.*

Step 3

1. Login to a workstation as MyDomain\AutoReportsUser and check that you can access SIMS and create/run reports.
2. Select **Focus | Alerts | Schedule Reports** and add a report to the report scheduler ensuring that **AutoReportsUser** is selected as the recipient.
3. Go to the **Home Page**. Click the **Configure** button and ensure that the **My Reports** panel is selected.
4. Ideally, password lock the machine and leave it on so that you can return and check that everything is working.

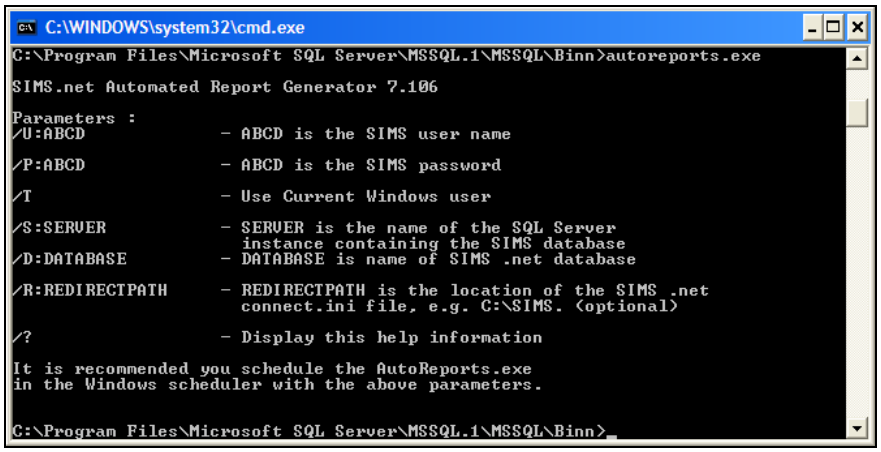
Additional Resources:

Using the Home Page chapter of the *Managing Pupil/Students* handbook

Step 4

1. Log into the SQL Server as the MyDomain\AutoReportsUser user and ensure that the SQL `Binn` folder, which contains the `AutoReports.exe`, can be accessed.
2. Open a command prompt window and navigate to the SQL `Binn` folder, e.g. `C:\Microsoft SQL Server\MSSQL.1\MSSQL\Binn`).

3. Run AutoReports.exe which should return the following usage instructions in the command window.



Troubleshooting

If any errors are displayed, it may be caused by the SQL Applications not being up to date. If you are in doubt, run the following file:

S:\SIMS\SETUPS\SIMSSQLApplicationSetup.exe

(where S:\SIMS\SETUPS is the location of your SIMS File Server Setups folder).

Check that the location of the SQL installation, matches the folder that you are currently in. Faults are often traced to SIMS.INI pointing to the SQL 2000 instance previously in use.

Step 5

In the command window run:

AutoReports■/S:<Server Name>\Instance Name]■/D:<Database Name>■/T

Where the ■ symbol represents a space.

For Example:

AutoReports■/S:MyServer\SIMS2014■/D:SIMS■/T

From the Control Panel, select **System and Security | Administrative Tools | Event Viewer** to display the **Event Viewer** window. Under the **Applications and Services Logs** event on the left-hand side of the **Event Viewer** window ensure that the AutoReports.exe has run successfully without any errors reported.

Step 6

1. Return to the SIMS workstation and unlock it.
2. From the **Home Page** in SIMS, click the **Refresh** button to refresh the display. If all is well then the report scheduled to the **AutoReportsUser** should be displayed in the **My Scheduled Reports** panel.
3. Click on the report hyperlink and make sure that it opens.

Troubleshooting

If the report does not open, you may need to delete the scheduled report request and create a new one for the same report so that you do not have to wait until tomorrow before you can try again.

- If it is a school holiday ensure the skip holidays box is unchecked via **Focus | Alerts | Schedule Reports**.
- In addition, make sure that the MyDomain\AutoReportsUser can indeed run the report that was selected, i.e. they have applicable permissions to run reports and to the data contained within the report.
- You may also want to check that the Document Management Server is visible to the SQL server via **Tools | Setups | Document Management Server**. Click the **Test** button to test the connection.

Step 7

1. Return to the Server.
2. Add a scheduled task to run autoreports with the parameters shown in Step 5 (please see *Setting up the AutoReports Scheduled Task* on page *229*). Sanity check the time of reports with server backup schedules. It is recommended that the scheduled task is set to Daily so that users requesting a report at the weekend will not be disappointed.
3. Log out and wait for the morning to ensure that the report has been produced at the scheduled time.

Step 8

Schedule a report to be received by another SIMS user and check that the report has been received at the scheduled time.

Step 9

Advise users of the availability of this process. Users will need to add the **My Reports** panel to their **Home Page** to enable them to see reports that are created for them.

Setting up the AutoReports Scheduled Task

Before being able to schedule reports in SIMS, a Windows® Scheduled Task must be created.

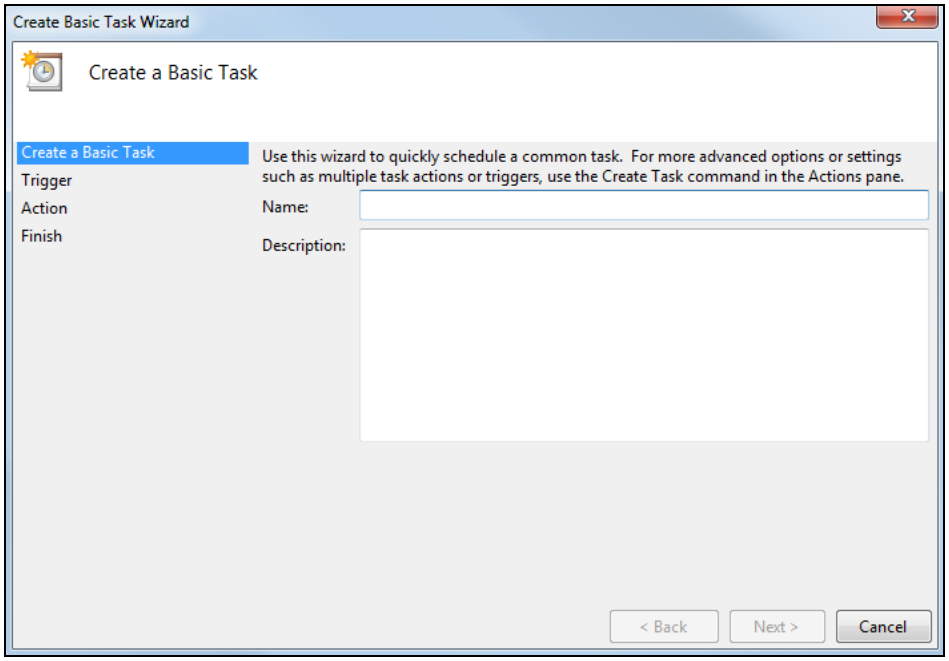
The Scheduled Task should be set up on the SIMS SQL server machine where the SIMS database is stored. The task will only run successfully if the Document Management Server and the SIMS SQL server machine are both available.

1. Click the Windows **Start** button to display the **Start menu**.
2. Select **All Programs | Accessories | System Tools | Task Scheduler** to display the **Task Scheduler** page.

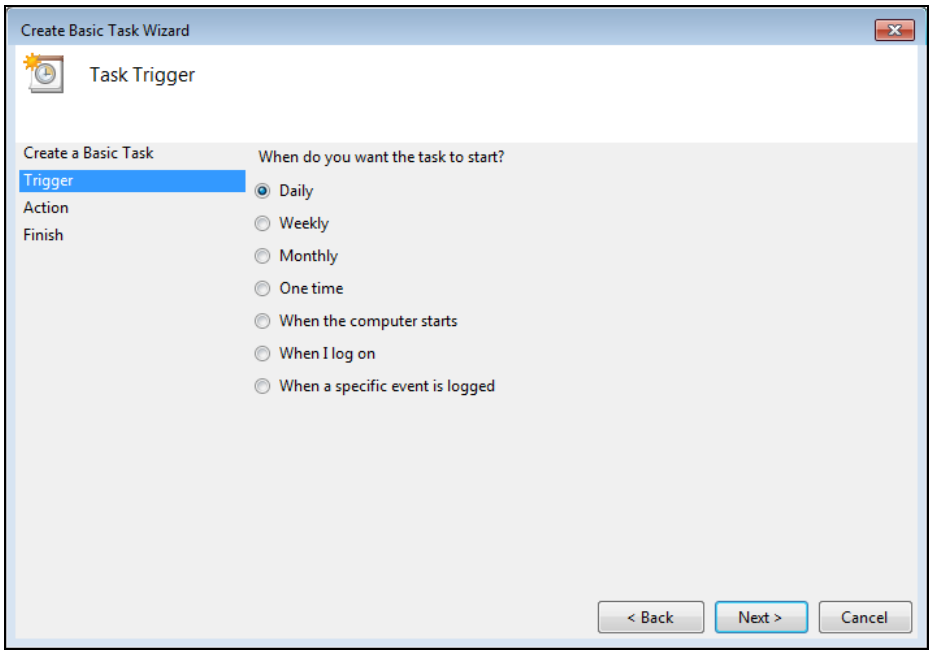
   Alternatively, click **Control** Panel then **System and Security**.

   If administrator rights have been set up you may be required to enter a **Password**.

3. Select **Action | Create Basic Task** to display the **Create Basic Task** wizard. Alternatively, select **Create Basic Task** from the **Actions** panel.



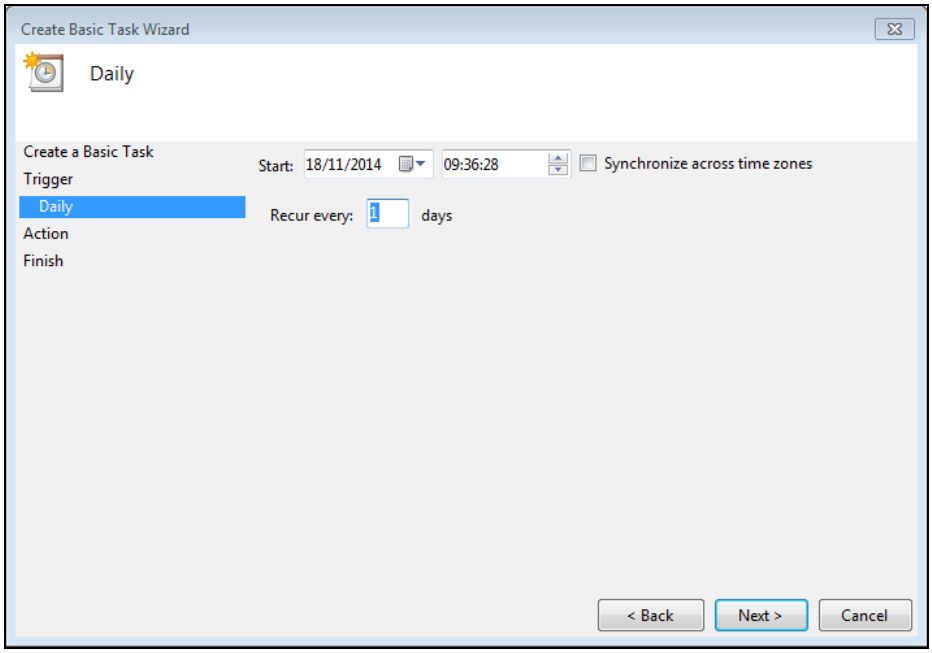
4. Enter the required **Name**, e.g. `AutoReports`, and a **Description** (optional) for the scheduled task.
5. Click the **Next** button to display the **Task Trigger** page.



6. Select the appropriate radio button to indicate how frequently the task should be run, e.g. **Daily**.

IMPORTANT NOTE: *Ensure that frequency is set to the most frequent time span that reports are scheduled in SIMS, i.e. Daily.*

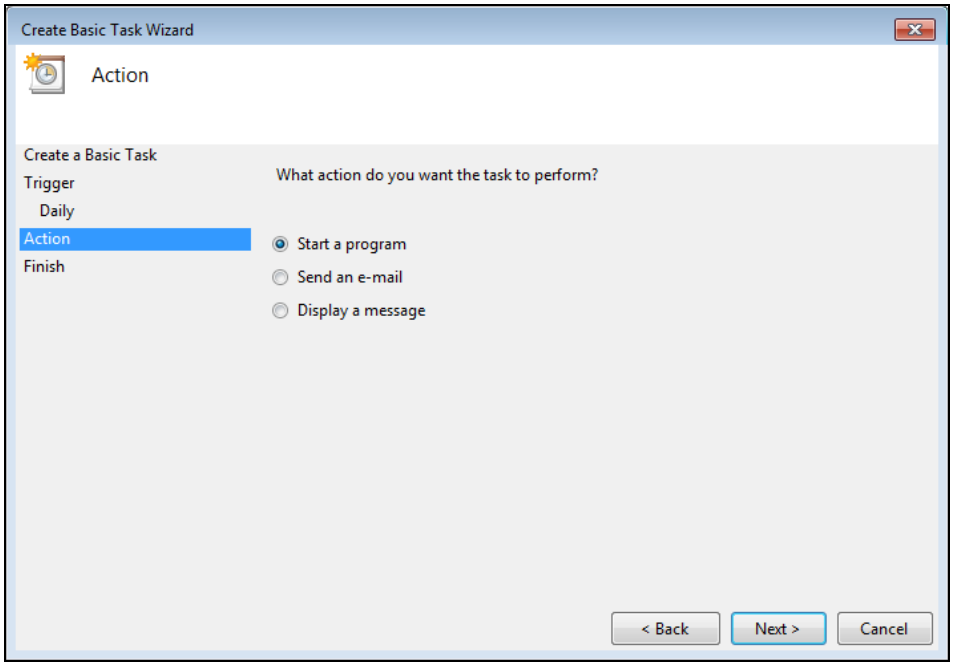
7. Click the **Next** button to continue. The content of the next page varies according to the radio button selected on the previous page, enabling you to select the detail of the task frequency. The following graphic shows the settings for **Daily**.



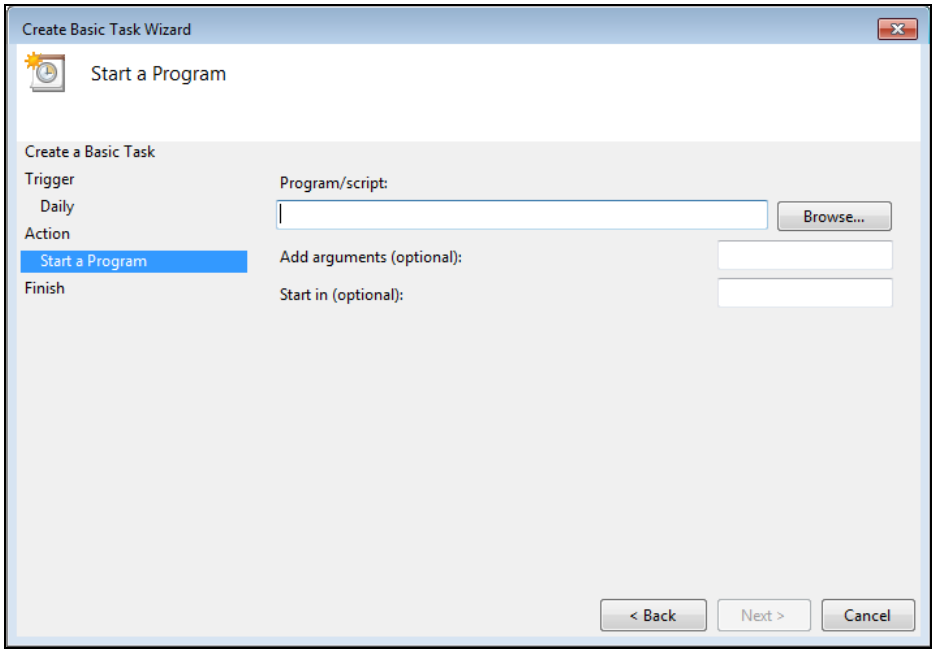
8. The **Start** date determines the first date that the Scheduled Task should run and defaults to today's date. Set the date as required by clicking the drop-down arrow and selecting an alternative date from the Calendar.
9. The **Start** time defaults to the system time set on your PC. This time can be changed by clicking the **Up** and **Down** arrows until the required time that you want the task to run is displayed.
10. Enter the number of days in which the scheduled task should be repeated in the **Recur every** field. The previous example shows an event being repeated every **1** day.

IMPORTANT NOTE: *Ensure that frequency is set to the most frequent time span that reports are scheduled in SIMS, i.e. every 1 day.*

11. Click the **Next** button to display the **Action** page.

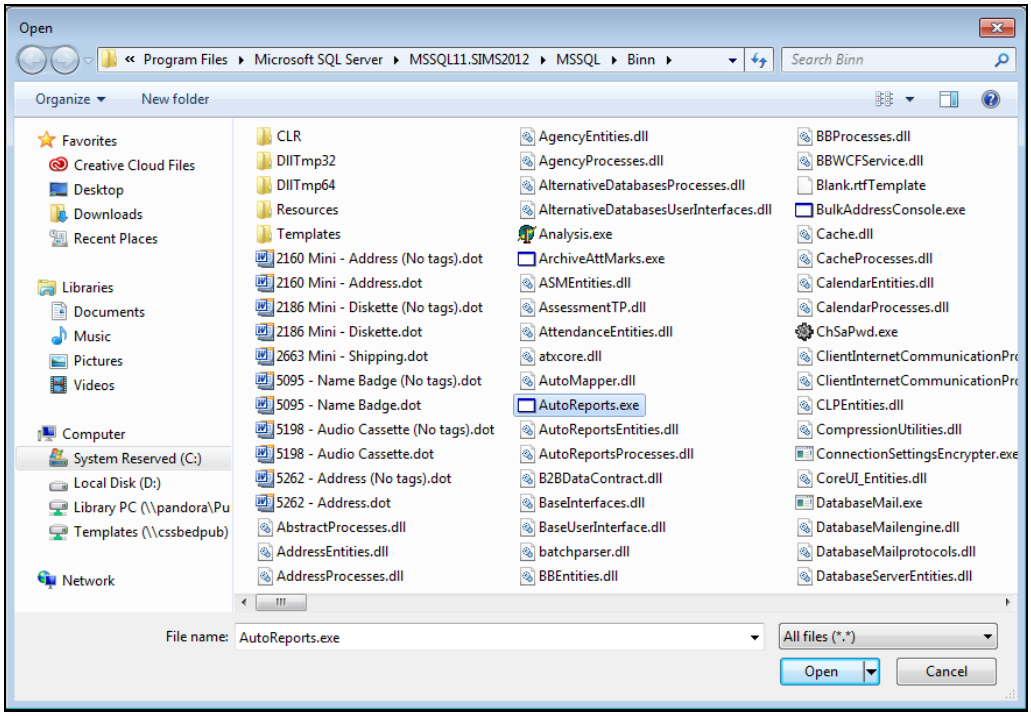


12. Select the **Start a program** radio button.
13. Click the **Next** button to display the **Start a Program** page.

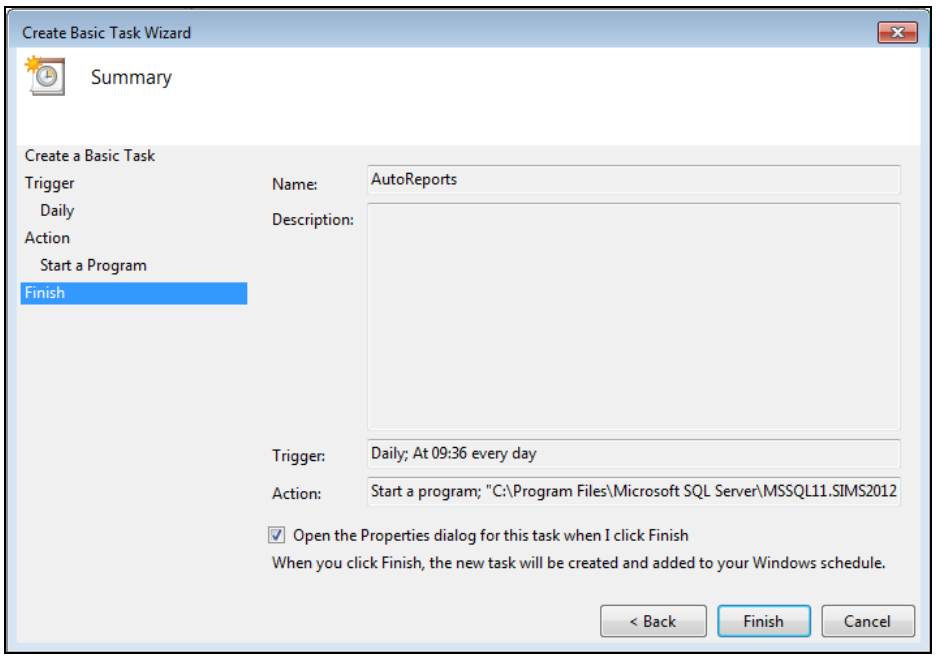


14. Click the **Browse** button to display Windows® **Open** dialog. Navigate to the location of your `Binn` folder for your SIMS SQL Server, typically: `C:\Program Files\Microsoft SQLServer\MSSQL11.SIMS2012\MSSQL\Binn` (where `C:\` is the network drive with SIMS installed).

For guidance on navigating to files on your local workstation when you are working in a Hosted environment, please contact your System Manager or local Support.



15. Highlight `AutoReports.exe` and click the **Open** button to return to the **Start a Program** page.
16. Click the **Next** button to display the **Summary** page.



17. Select the **Open the Properties for this task when I click Finish** check box.

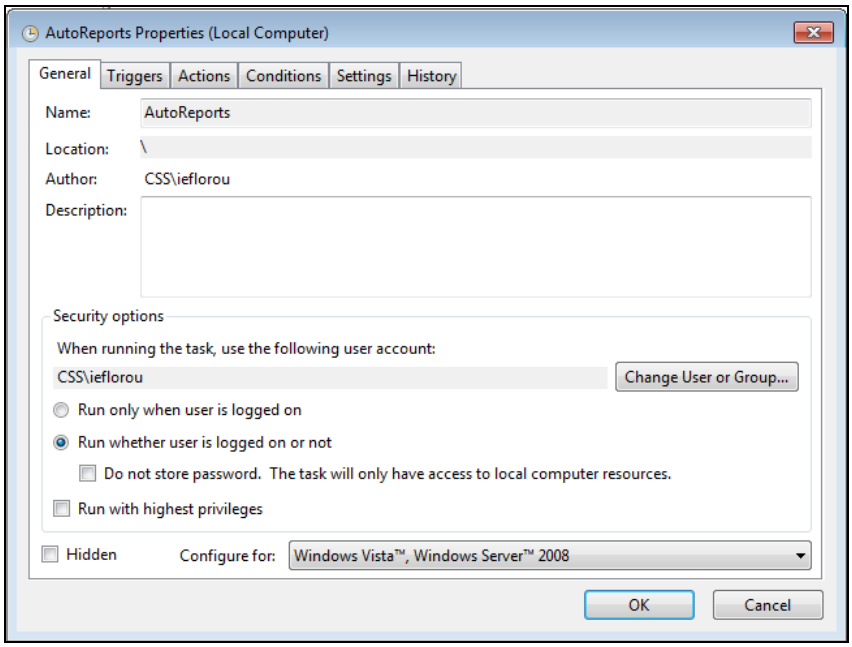
18. Click the **Finish** button to return to the **Task Scheduler** page, where the newly created scheduled task is displayed in the **Active Tasks** panel.

More Information:
Considerations on page *221*

Editing the Scheduled Task Properties

Once the Windows Scheduled Task has been created, various additional parameters need to be added.

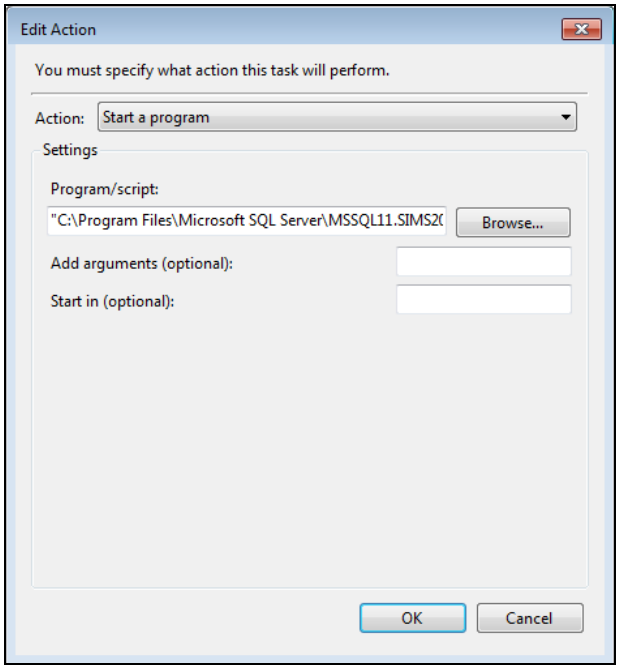
1. After the **Finish** button has been clicked in the previous step, the Windows® **<Scheduled Task Name> Properties (Local Computer)** dialog is displayed. If you need to edit these parameters in the future, open the scheduled task by selecting **Start | All Programs | Accessories | System Tools | Task Scheduler** to display the **Task Scheduler** window.
2. Double-click the scheduled task on the **Active Tasks** panel and then right-click the scheduled task, which is displayed in the table at the top of the page, and select **Properties** to display the **AutoReports Properties (Local Computer)** dialog.



3. In the **General** tab, check that the information is listed correctly in the **Name**, **Location**, **Author** and **Description** fields.
4. In the **Security Options** panel, the **When running the task, use the following user account** field is populated automatically from your Windows login name. Click the **Change User or Group** button if you want to change the user account.

   In the **Select User or Group** dialog, complete the fields by following the instructions in the Windows online help system.
5. Select the **Run whether user is logged on or not** radio button.

6. In the **Actions** tab, click the **Edit** button to display the Windows® **Edit Action** dialog.



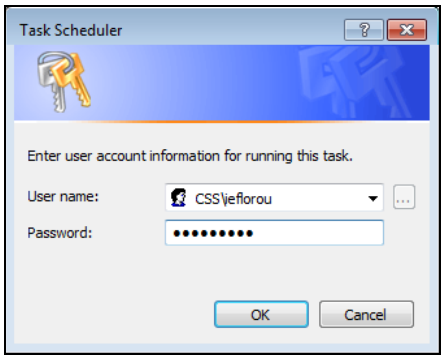
7. At the end of the **Program / script** field, add the following parameters:
`/U:username■/P:password■/S:machinename\SIMS■D:databasename`
The ■ symbol indicates a space which must be included as shown.
The following table describes the purpose of each parameter.

Parameter	Example	Purpose
/U:	e.g. `grosg`	The SIMS user name of the individual running the Scheduled Task. This should be a user who has permissions to all the applicable data in SIMS.
/P:	e.g. `abcd`	The SIMS password of the individual running the Scheduled Task
/S:	e.g. `XP4541\SIMS`	The name of the SQL Server instance containing the SIMS database.
/D:	e.g. `SIMS`	The name of the SIMS database
/T:		Logs in using the current Windows User. If you have created a specific windows account for the purpose of report scheduling, add this parameter to use that user's login credentials.

An example of a completed run time parameter is as follows:

```
C:\Program■Files\Microsoft■SQL■Server\MSSQL11.SIMS2012\MSS
QL\Binn\
AutoReports.exe''■/U:grosg■/P:abcd■/S:XPLT5370■/D:SIMS
```

8. Click the **OK** button to save these settings.
9. Click the **OK** button on the Windows® **<Scheduled Task Name> Properties (Local Computer)** dialog to display the **Task Scheduler** dialog.



The **User name** field is populated automatically from the user account details that you defined earlier.

10. Enter the **Password** for the selected user account.
11. Click the **OK** button to display the **Task Scheduler** window.

More Information:
Considerations on page *221*

Selecting Reports for Scheduling

Before scheduling any reports to run in SIMS, you should consider the following in order for the reports to run successfully:

- Ensure that you have applicable permissions to the data contained within the required report. If this is not the case, the scheduled report is created, but you are unable to open the report.
- Consider the validity of the report. Your System Administrator can advise what time of day scheduled reports will run. This is likely to be out of school hours, although this is not always the case. If you want to schedule a daily report, you will need to consider the content of that report. For example, if you are scheduling a report listing pupil/students who were absent at registration, the report is produced at the time set by the System Administrator. If this is in the early hours of the morning, the report is produced before today's data is entered and will therefore show yesterday's data (which may be acceptable to you).

For information on setting up scheduled reports, please refer to the *Using the Home Page* chapter in the *Managing Pupil/Students* handbook.

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Data Included in the CTF Files 237

Data Included in the CTF Files

Student Basic Details

Applicable Regions	Data Details
England and Wales	UPN (Unique Pupil Number) ULN (Unique Learning Number) Former UPN Preferred Surname Former Surname Legal Surname Preferred Forename Middle Names National Curriculum Year Ethnicity Ethnicity Source Language Information (Language Type and Language) Country of Birth Free School Meals eligibility Free School Meals Review Date Medical Flag Disabilities Enrolment Status Phones Email
England only	Nationality Proficiency in English

SEN Information (All Regions)

Applicable Regions	Data Details
England and Wales	SEN History SEN Basic Needs - (Start Date and SEN Provision) SEN Needs (SEN Type Rank, SEN Type)
Wales only	SEN Provisions (Curriculum and Teaching Methods, Grouping and Support, Advice and Assessment, Specialised Resources)

Attendance Summary

Applicable Regions	Data Details
England and Wales	Year Date Year LEA Establishment Number School Name Sessions Possible Sessions Attended Sessions Unauthorised Sessions Authorised

Student Address

Applicable Regions	Data Details
England and Wales	BS7666 Address Information SAON PAON Street Locality Town County Postcode Country UPRN (Unique Property Reference Number)

Assessment Data (for England, KS1 tasks/tests is also included)

Applicable Regions	Data Details
England and Wales	Key Stage Information Stage Description Stage Assessment Locale Year KS Subject Method Component Result Status Result Qualifier Result Result Date

Programme of Study (PoS) Assessments

Applicable Regions	Data Details
England and Wales	Supplier Result Date Grade

School History

Applicable Regions	Data Details
England and Wales	School Information LEA Number Establishment Number School Name Entry Date Leaving Date Leaving Reason Last School

FSM History

Applicable Regions	Data Details
England and Wales	FSM Review Date FSM Start Date FSM End Date

Looked After

Applicable Regions	Data Details
England and Wales	InCare Care Authority

Student Contacts

Applicable Regions	Data Details
England and Wales	Order Title Surname Forename Middle Names Gender Relationship Address Phones Email

External Exam Results

Applicable Regions	Data Details
England and Wales	SuppID Board Level Subject ResultType Gradeset AspectName LEA Estab Month Year Result

NAW Details (Welsh Tags)

Applicable Regions	Data Details
Wales only	Speak Welsh National Identity

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