

**SIMS**

# Getting Started with SIMS

Applicable to 7.132 Onwards

**Handbook**



**CAPITA**  
CHILDREN'S SERVICES

## Revision History

| Version      | Change Description | Date     |
|--------------|--------------------|----------|
| 7.132 – v1.0 | Initial release    | 02/06/10 |

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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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# 01 Introduction

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## Overview

This guide has been designed to help familiarise new users with SIMS. It covers the basic and most frequently used functionality within the application. Detailed instructions can be found in the various other SIMS handbooks. All handbooks can be accessed from the **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button, select the required category, and then click the required handbook from the **Handbooks** page.

It is assumed that the current academic year and pastoral structures have been set up.

SIMS supports schools in managing their statutory returns, raising standards of achievement and student attainment, managing finances and sharing good teaching practices.

SIMS offers a wide range of specialist solutions, which integrate seamlessly to provide an all-inclusive, single MIS. This approach provides schools with the benefit of customising their MIS to meet their everyday administrative and management activities. The solutions enable schools to manage student registration and truancy, student performance, personalised learning, exam organization, timetable construction, cover management and many more school activities.

## Permission and Licensing Requirements

Permissions are assigned using SIMS System Manager to ensure that only the functionality appropriate to each user is available. Therefore, users with few requirements are not overwhelmed by unwanted complexity and users with more extensive needs are not frustrated by a lack of functionality. This will be reflected in the number of menu options available to you.

Using permissions, it is also possible to protect sensitive areas of data, e.g. medical information. Such data is blanked out in report outputs and will not be visible on-screen for users who do not have the appropriate permissions.

Please contact your System Manager if you are unsure whether you have the applicable permissions to use the various areas of SIMS.

## Logging in to SIMS

Your System Manager will supply you with a user name and a password for SIMS. If your System Manager has set up your login script using Windows Authentication, you can log into SIMS without entering a user name or password. Please contact your System Manager to find out the appropriate method of logging into SIMS.

1. Select **Start | All Programs | SIMS Applications | SIMS .net** to display the **SIMS .net** login dialog.



2. If you are using Windows Authentication, select the **Current Windows User** radio button then click the **OK** button to log into SIMS and to display the **Home Page**. Alternatively, select the **SIMS User** radio button then enter your allocated **User name** and **Password** then click the **OK** button.

## Title Bars

There are two Title Bars in SIMS. The top Title Bar always displays the title **SIMS .net** and your school name, as shown in the following graphic.



The second Title Bar displays your current location in SIMS. In the following example, the **Home Page** is displayed together with the name of the user who is currently logged into SIMS.



In SIMS, it is possible to have many windows open at a time and therefore, many areas of functionality can be open at the same time. For example, you can access the **Student Details** page and the **Staff Details** page, then switch between the two windows as required. The Title Bar is therefore a useful way of identifying your location in SIMS.



### More Information:

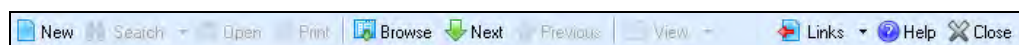
*Moving Between Open Windows on page 15*

## Toolbars

As with Title Bars, there can also be more than one toolbar in SIMS. The main toolbar is located immediately below the Menu Bar and provides access to commonly used functionality in SIMS. These buttons act as shortcuts to functionality that can otherwise be accessed via the menu system.



The browser toolbar is displayed immediately below the browser Title Bar and provides access to frequently used browser functions.

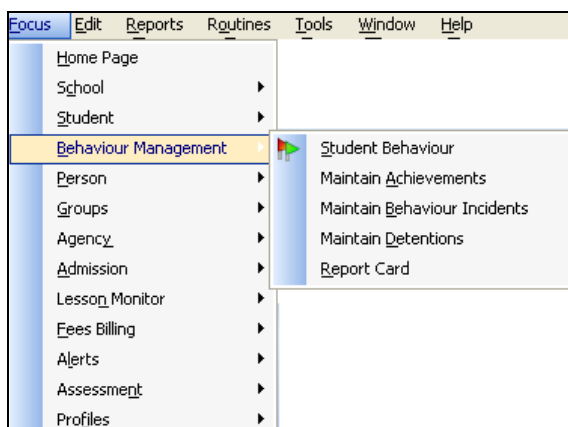


The page toolbar is displayed immediately below the page Title Bar and provides access to frequently used page functions, such as **Save** and **Print**.



## Menu Bar

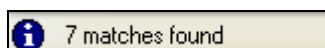
Menus are used to navigate around SIMS and to perform functions. The menu options available depend on the permissions that have been assigned to you by your System Manager. Therefore if you have limited permissions, fewer menu options are available. The following graphic shows some of the options available from the **Focus** menu:



**IMPORTANT NOTE:** Users with the appropriate permissions can rename menu routes. It is therefore possible that menu routes may be named differently to those described in this handbook. Additionally, the naming of menu routes, pages, dialogs, etc. throughout SIMS vary between school phases. This includes the use of the terms Pupil and Student. For example, the menu structure in the previous graphic would be displayed as **Focus | Pupil**, **Focus | Behaviour Management | Pupil Behaviour**, etc. in a Primary school.

## Status Bar

The **Status Bar** is displayed at the bottom of the screen and provides information on the status of your current task.



The information displayed may include warnings, prompts or the number of matches found as a result of a search.

## Documentation Centre

All handbooks can be accessed from the **Documentation Centre**, which is launched by clicking the **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button, select the required category, then click the required handbook on the **Handbooks** page.

## Home Page

For in depth information relating to the configuration of the **Home Page**, please refer to the *Managing Pupil/Students in SIMS* handbook or the *SIMS Home Page Mini Guide*.



# 02 | Navigation in SIMS

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## Introduction

There are several functions in SIMS that facilitate navigation around the system. On most screens, these functions are accessible from the main toolbar.

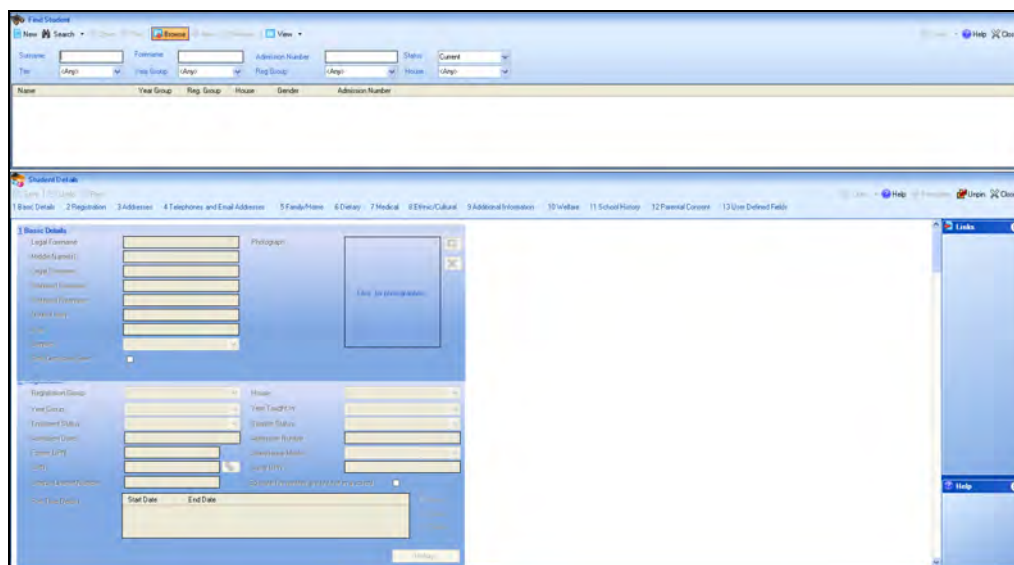
## Searching for Information

Browsers are used throughout SIMS to help you to search for specific records or items of data. For example, browsers are available in the **Pupil** (or **Student**) and **Person** focus areas to help to search for specific pupil/students or people (such as members of staff, contacts, etc.). When adding new data records in SIMS, you are strongly advised to perform a search to ensure that the data has not already been recorded. Carrying out a search reduces the risk of recording duplicate details, therefore maintaining the integrity of your data.

The following example describes how to search for a pupil/student, however the principle is the same throughout the rest of SIMS.

Navigate to the area of SIMS in which you want to perform a search, e.g. select **Focus | Pupil** (or **Student**) | **Pupil** (or **Student**) **Details**.

The browser is displayed at the top of the page. In this example, this is called the **Find Student** browser.



The **Student Details** page (displayed in the lower section of the screen) displays the record selected from the browser but it remains blank until a record is selected or until a new record is created.

The following search criteria can be used, either individually or in combination.



**NOTE:** The more search criteria you apply, the fewer records will be returned and the faster the search will be completed.

## Listing All Available Records

To list all the records in the selected area of SIMS, click the **Search** button in the browser without entering or selecting any search criteria. If there is a large number of records, it may take some time to populate the browser with matching records.

## Entering and Selecting Search Criteria

You can enter or select search criteria to find the required record(s). In the previous example, you can enter all or part of a pupil/student's **Surname**, **Forename**, etc. or select the required option(s) from the drop-down list(s).



**NOTE:** Search fields are not case sensitive.

## Entering Complete Values

Entering Smith in the **Surname** field searches for all pupil/students with the surname of Smith.

The screenshot shows the 'Find Student' window with the 'Surname' field set to 'smith'. The search results table is as follows:

| Name          | Year Group | Reg. Group | House  | Gender | Admission Number |
|---------------|------------|------------|--------|--------|------------------|
| Smith, Adam   | 7          | 7A         |        | Male   | 003328           |
| Smith, Callum | 7          | 7B         |        | Male   | 003751           |
| Smith, Colin  | 13         | H          | Newton | Male   | 002535           |
| Smith, Dan    | 8          | 8D         |        | Male   | 003437           |
| Smith, Jason  | 9          | 9B         |        | Male   | 003394           |
| Smith, Jason  | 13         | J          | Newton | Female | 002629           |
| Smith, Kyle   | 9          | 9F         |        | Male   | 003395           |
| Smith, Mark   | 7          | 7C         |        | Male   | 003693           |

## Entering Partial Values

Partial values can be useful for limiting the number of records returned, perhaps when information is being edited in batches. For example, entering At in the **Surname** field returns all students whose names begin with At: Atkins, Atkinson, Atlieri, etc.

The screenshot shows the 'Find Student' window with the 'Surname' field set to 'At'. The search results table is as follows:

| Name             | Year Group | Reg. Group | House | Gender | Admission Number |
|------------------|------------|------------|-------|--------|------------------|
| Atlieri, Carmela | 7          | 7E         |       | Female | 003719           |

## Using Wildcards

Wildcards are particularly useful when you are unsure of a spelling. You can use either \* or ? as wildcards. For example, entering Ahm\*d or Ahm?d would return either of the following spellings: Ahmad or Ahmed.

The screenshot shows the 'Find Student' window with the 'Surname' field set to 'Ahm\*d'. The search results table is as follows:

| Name         | Year Group | Reg. Group | House | Gender | Admission Number |
|--------------|------------|------------|-------|--------|------------------|
| Ahmad, Aafia | 10         | 10F        |       | Female | 003109           |
| Ahmed, Mohan | 10         | 10F        |       | Male   | 003110           |

## Selecting from Drop-Down Lists

Most browsers contain drop-down lists that enable you to select a value on which to search, such as a **Year Group**. By default, most drop-down lists default to **<Any>**. Select the required value from the drop-down list.

You can select from multiple drop-down lists to facilitate a search.

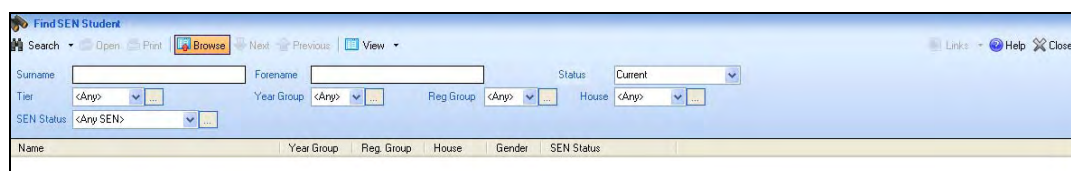
The **Status** drop-down list determines the currency of what is being searched on. For example when searching for pupil/students, you can search for all children, children on-roll, guest children, current, etc.

## Searching for Inactive Items

By default, all active records are searched. However there may be occasions when you want to search for records that have been made inactive. Records are considered inactive if they have been set accordingly, such as lookup codes that are no longer required but cannot be deleted because their removal would affect historical data.

In addition, year groups, registration groups and houses may be made inactive if a school changes from being a Middle school to a Secondary school, for example, or where the pastoral structure of the school has been changed.

Inactive items can still be viewed in many browsers throughout SIMS by clicking the **Inactive Items** button, which is displayed adjacent to the appropriate drop-down lists.

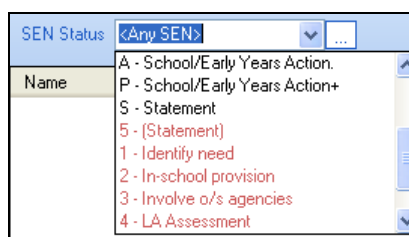


You can remove the inactive items from the drop-down lists by clicking the **Inactive Items** button again.



*Inactive Items button*

The following graphic shows an example of some inactive items in a drop-down list. The inactive items are identified by red text.



## Carrying Out the Search

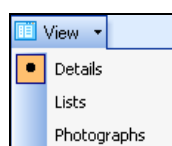
Once the required search criteria have been entered, click the **Search** button to display all matching records.

## Changing the Search Results Display

The following graphic shows the results of a search carried out in a Secondary school, for students in **Year 11** and **Flemming** house. Click any of the column headings to order the results on the selected column, e.g. clicking the **Reg. Group** column header orders the results in alphabetical order (**11A**, **11B**, **11C**, etc.). Clicking it again reverses the order (**7C**, **7B**, **7A**, etc.).

| Name             | Year Group | Reg. Group | House    | Gender | Admission Number |
|------------------|------------|------------|----------|--------|------------------|
| Ashman, Lucy     | 11         | 11E        | Flemming | Female | 002925           |
| Barber, Cerys    | 11         | 11E        | Flemming | Female | 002928           |
| Docking, Gemma   | 11         | 11E        | Flemming | Female | 002955           |
| Kenchington, Seb | 11         | 11E        | Flemming | Male   | 002991           |
| Singer, Jason    | 11         | 11E        | Flemming | Male   | 003047           |

In addition, the type of information displayed in the browser can be changed by selecting any of the following options from the drop-down list adjacent to the **View** button:



Selecting **Details** displays key additional information about the records returned by the search. When searching for pupil/students in the following Secondary school example, the **Year Group**, **Reg. Group**, **House**, **Gender** and **Admission Number** are also displayed.

| Name                | Year Group | Reg. Group | House    | Gender | Admission Number |
|---------------------|------------|------------|----------|--------|------------------|
| Abdelkoder, Mohamed | 11         | 11C        | Flemming | Male   | 002915           |
| Allbright, Frankie  | 11         | 11B        | Flemming | Female | 002921           |
| Archer, Patrik      | 11         | 11E        | Flemming | Male   | 002924           |
| Ashman, Lucy        | 11         | 11E        | Flemming | Female | 002925           |
| Barber, Cerys       | 11         | 11E        | Flemming | Female | 002928           |
| Burbank, Amber      | 11         | 11F        | Flemming | Female | 002941           |
| Diddams, Zoe        | 11         | 11F        | Flemming | Female | 002951           |
| Docking, Gemma      | 11         | 11E        | Flemming | Female | 002955           |
| Fish, Lucas         | 11         | 11C        | Flemming | Male   | 002962           |

Selecting **List** displays just the names of the matching records.

|                     |                  |                           |                    |
|---------------------|------------------|---------------------------|--------------------|
| Abdelkoder, Mohamed | Gough, Matt      | Kitching, Lydia           | Singer, Jason      |
| Allbright, Frankie  | Gunning, Patrick | Lawrence, Thomas          | Slaughter, Belinda |
| Archer, Patrik      | Halliday, Mitzi  | Long, Aimee               | Starsmore, Elliot  |
| Ashman, Lucy        | Hayter, Joel     | Macgregor-Prangnell, Leon | Torro, Stephen     |
| Barber, Cerys       | Haywood, Leon    | Machin, David             | Trueman, Philip    |
| Burbank, Amber      | Hoffman, Rebecca | Mist, Conor               | Tsang, Ling        |
| Diddams, Zoe        | Hopkins, John    | Morey, Dominic            | Vinson, Zac        |
| Docking, Gemma      | Isaac, Lara      | Pendle, Harriot           | Walsh, Erin        |
| Fish, Lucas         | Kenchington, Seb | Powell, Corey             | Weedon, Emma       |

Selecting **Photographs** displays photos associated with the matching records.



**WARNING:** Displaying photographs when carrying out a search can lead to a significant reduction in the performance of SIMS. You are strongly advised to view photographs only where a small number of records will be returned (such as a class or registration group).

It is possible to turn off the display of photographs, if required. For more information please see *Specifying the Visual Settings* on page 38.

## Selecting a Record or Item from the Browser

Once the required record or item has been found, its content can be displayed using either of the following methods:

- Click the record or item in the browser then click the **Open** button on the toolbar.
- Double-click the required item.



*NOTE: By default, once a record has been selected using either of these methods, the browser is automatically minimised in order to maximise the display space for the selected record. For information on how to display the browser again, please see Switching the Browser On and Off on page 12.*

## Switching the Browser On and Off

Once a record has been selected, the browser is automatically minimised in order to maximise the display space for the selected record. To display the browser again, click the **Browse** button on the toolbar.

The **Browse** button is a toggle button and therefore, clicking the button again minimises the browser.

It is possible to change the default setting so that the browser remains open once a record is selected. For more information, please see *Specifying the Visual Settings* on page 38.

## Viewing Next and Previous Records

Once a record has been selected from the browser, it is possible to cycle through all the other records that were listed in the browser. This is achieved by clicking the **Next** and **Previous** buttons on the toolbar.

For example, if the search listed all the children in registration group 7B, clicking the **Next** button would display the next child (alphabetically) in 7B.

## Using the Hyperlinks

Hyperlinks in SIMS are similar to links available on the Internet and can be identified by:

- an underlined field label in a panel
- the display of an underline when the cursor hovers over a panel-related item below the toolbar at the top of the page.

**Student Details: Rebecca Hoffman**

Save | Undo | Print | Links | Help | Favourites | Unpin | Close

1 Basic Details 2 Registration 3 Addresses 4 Telephones and Email Addresses 5 Family/Home 6 Dietary 7 Medical 8 Ethnic/Cultural 9 Additional Information 10 Welfare 11 School History 12 Parental Consent 13 User Defined Fields

**1 Basic Details**

Legal Forename: Rebecca  
 Middle Name(s):  
 Legal Surname: Hoffman  
 Preferred Surname: Hoffman  
 Preferred Forename: Rebecca  
 Date of birth: 02/07/1994  
 Age: 15 years, 11 months  
 Gender: Female  
 Title:

Photograph: [Image]  
 Birth Certificate Seen: ☐  
 History: [Button]

[Quick Note](#)

**2 Registration**

Registration Group: 11C  
 Year Group: Year 11  
 Enrolment Status: Single Registration  
 Admission Date: 05/09/2005  
 Former UPN:  
 UPN: Z820432105071  
 Unique Learner Number:  
 Part Time Details: Start Date: End Date:  
 Locker Number:

House: Fleming  
 Year Taught In: Curriculum Year 11  
 Boarder Status: Not a Boarder  
 Admission Number: 002985  
 Attendance Mode: All day  
 Local UPN:

New  
 Update  
 Delete  
 History: [Button]

The previous graphic shows numbered hyperlinks below the main toolbar, which relate to panels on the **Student Details** page, and hyperlinks in the **Registration** panel, for fields such as **Registration Group**, **Year Group**, **House**, **Year Taught In**, and **Boarder Status**.

By default the panels are displayed numerically, in sequence with the panel hyperlink list below the toolbar. Clicking a panel hyperlink (e.g. **Medical**), displays that panel at the top of the page.

Hyperlinks in panels display a page listing all other pupil/students associated with the selected hyperlink. The following graphic shows what happens when you click the **Year Taught In** hyperlink in the **Registration** panel; all pupil/students in **Curriculum Year 11** are displayed.

National Curriculum Year Curriculum Year 11 12/05/2010

New Open Save Undo Print

1 Details 2 Members

Effective Date  
Effective Date 12/05/2010 Refresh

1 Details  
Name Curriculum Year 11 Supervisor

2 Members  
Count 162

| Admission Number | Surname    | Forename    | Year |
|------------------|------------|-------------|------|
| 002915           | Abdelkoder | Mohamed     | 11   |
| 002916           | Adams      | James       | 11   |
| 002917           | Adams      | Owen        | 11   |
| 002918           | Alzal      | Kashif      | 11   |
| 002919           | Aldridge   | Rachel      | 11   |
| 002920           | Ali Agca   | Pasha       | 11   |
| 002921           | Allbright  | Franchester | 11   |
| 002922           | Anderson   | Dylan       | 11   |
| 002923           | Antanouchi | Rosina      | 11   |
| 002924           | Archer     | Patrik      | 11   |
| 002925           | Ashman     | Lucy        | 11   |
| 002926           | Bainbridge | Olivia      | 11   |
| 002927           | Balchin    | Liam        | 11   |
| 002928           | Barber     | Cerys       | 11   |
| 002929           | Barton     | Oliver      | 11   |
| 002930           | Basan      | Selima      | 11   |
| 002931           | Bateman    | Alfie       | 11   |
| 002932           | Bendall    | Nathan      | 11   |
| 002933           | Bennett    | Jill        | 11   |
| 002934           | Blaber     | Jacob       | 11   |
| 002935           | Bloom      | Alexander   | 11   |
| 002936           | Borel      | Kayleigh    | 11   |
| 002937           | Borley     | Charles     | 11   |
| 002938           | Bratt      | Tyler       | 11   |
| 002939           | Briscoe    | Benjamin    | 11   |
| 002940           | Buryan     | Minna       | 11   |
| 002941           | Burbank    | Amber       | 11   |
| 002942           | Callum     | Garvett     | 11   |
| 002943           | Chapman    | Tom         | 11   |
| 002944           | Cheema     | Lakeesha    | 11   |
| 002945           | Chewan     | Sagar       | 11   |
| 002946           | Chokri     | Micheal     | 11   |
| 002947           | Christian  | Morgan      | 11   |
| 002948           | Cooper     | Rebecca     | 11   |
| 002949           | Cruwys     | Dafydd      | 11   |
| 002950           | Dickinson  | Mila        | 11   |
| 002951           | Diddams    | Zoe         | 11   |
| 002952           | Diganerio  | Raphael     | 11   |
| 002953           | Dillon     | Suzanne     | 11   |
| 002954           | Dixon      | Madison     | 11   |
| 002955           | Docking    | Gemma       | 11   |
| 002956           | Doherty    | Liam        | 11   |
| 002957           | Dwyre      | Maisie      | 11   |
| 002958           | Edwards    | Ethan       | 11   |

New Open Delete

Double-clicking any pupil/student name in this list then displays their individual record.

To return to the original record being viewed, click the **Back** button on the toolbar.

## Unpinning SIMS Windows

It is possible to **Unpin** (or detach) any window in SIMS so that it can be treated as a separate entity. For example, if you are designing a report, unpinning the **Report Design** window enables you to simultaneously display another **Report Design** window. This enables you to compare or copy elements of both report designs. It is also possible to display a completely different function, such as **Student Details**, in a separate window.

Windows are unpinned by clicking the **Unpin** button on the main toolbar.

Once detached, windows can be minimised, maximised and resized in the usual way.

## Moving Between Open Windows

In a single SIMS session, you might access many areas of functionality. Unless each window is closed (by clicking the **Close** button on the toolbar), each function remains open. You can cycle through open windows by clicking the **Back** and **Forward** buttons.

Click the **Back** button to view other open windows, noting that the button is active only if more than one window is open. The **Forward** button is active only if you have gone back to view a previous screen by clicking the **Back** button.



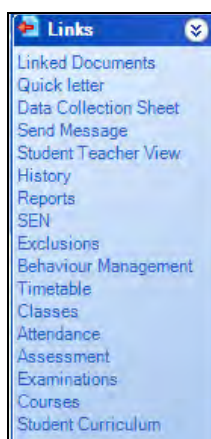
# 03

## Using Links

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| Viewing Curriculum Information.....                | 27 |

### Introduction

Links can be used to access functional areas in SIMS that are directly related to the current page. For example, if you are viewing or editing pupil/student details, the **Links** panel becomes active and provides shortcuts to **Attendance**, **Assessment**, Special Educational Needs (**SEN**) details and other information recorded against them.



Links can also be accessed by clicking the drop-down arrow adjacent to the **Links** button (located on the right-hand side of the toolbar), which displays a drop-down list matching those displayed in the **Links** panel.

The menu options displayed depend on your current location in SIMS. Options indicated by a **Calendar** button rely on an effective date being selected, which identifies the date on which you want the information to be based.

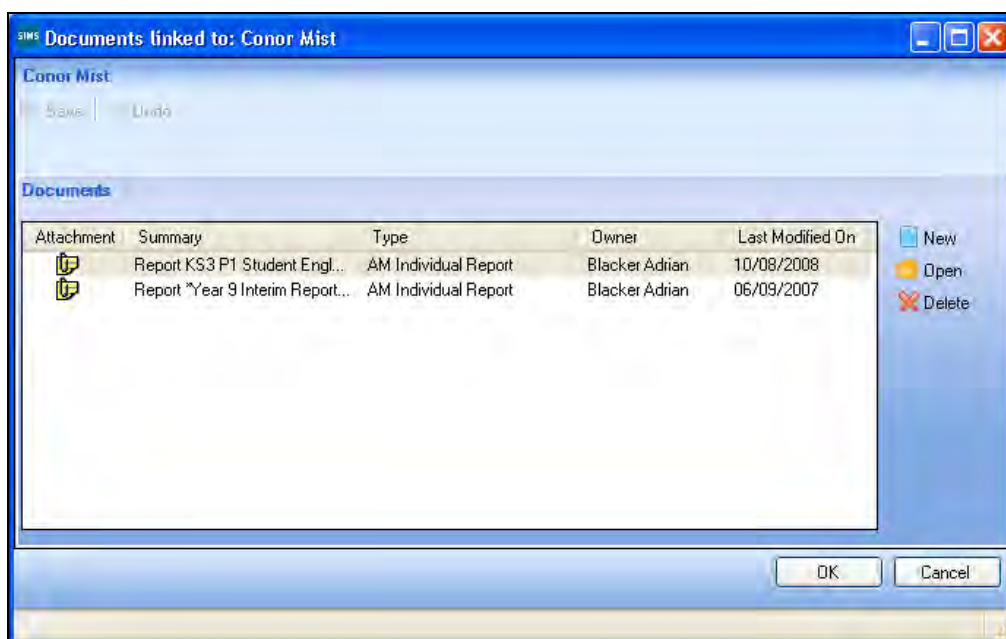
The **Links** panel can be hidden or restored to view by clicking the **Hide/Show Links Panel** button, situated on the right-hand side of the toolbar.



*Hide/Show Links Panel button*

## Viewing Linked Documents

Any documents associated with the selected pupil/student can be viewed by clicking the **Linked Documents** hyperlink in the **Links** panel to display the **Documents linked to** dialog. These can include pupil/student medical notes, SEN Statements, SEN Full Descriptions or general documents.



To display a document, either double-click it or highlight it then click the **Open** button. The **Edit Note/Document** dialog displays the content of the document. If the document then has an associated attachment, click the **View** button then click the **OK** button to display the attachment.

Linked documents can also be viewed through a number of panels on the **Pupil** (or **Student**) **Details** page. For example, in a pupil/student's record, click the **Medical** hyperlink below the toolbar to display the **Medical** panel.

If there are any documents associated with the pupil/student in any of the fields in the panel, either highlight the required document then click the **Open** button or double-click the document to display it. If the document then has an associated attachment, highlight it, click the **Open** button, click the **View** button then click the **OK** button to display the attachment.

## Producing a Quick Letter

Basic letters to a pupil/student's parent(s) or guardian(s) can be produced, saved and printed from within SIMS by selecting a pupil/student then clicking the **Quick letter** hyperlink in the **Links** panel, which opens Microsoft® Word with a predefined letter template selected.

The template automatically provides the relevant salutation and address information for the selected pupil/student's parent(s) or guardian(s).

[Edit QuickLettertemplate.rtf](#)  
 to put your own address here  
 and to make any other  
 changes to the template

12/05/2010

Mr and Ms S Mist  
 14 Sweetlands Corner  
 KENTS HILL  
 Milton Keynes  
 Bucks  
 MK7 6DR

Student: Conor Mist

Dear Mr and Ms Mist

Enter the required text in the body of the letter before printing or saving it.

## Viewing Pupil / Student History

Selecting **History** displays the pupil/student page with an **Effective Date** field below the toolbar, which can be used to specify the date on which the viewed data is to be based. For example, if you want to see a pupil/student's record for the last academic year, change the date accordingly then click the **Refresh** button. This is particularly useful for viewing previous year groups, registration groups, houses, etc.

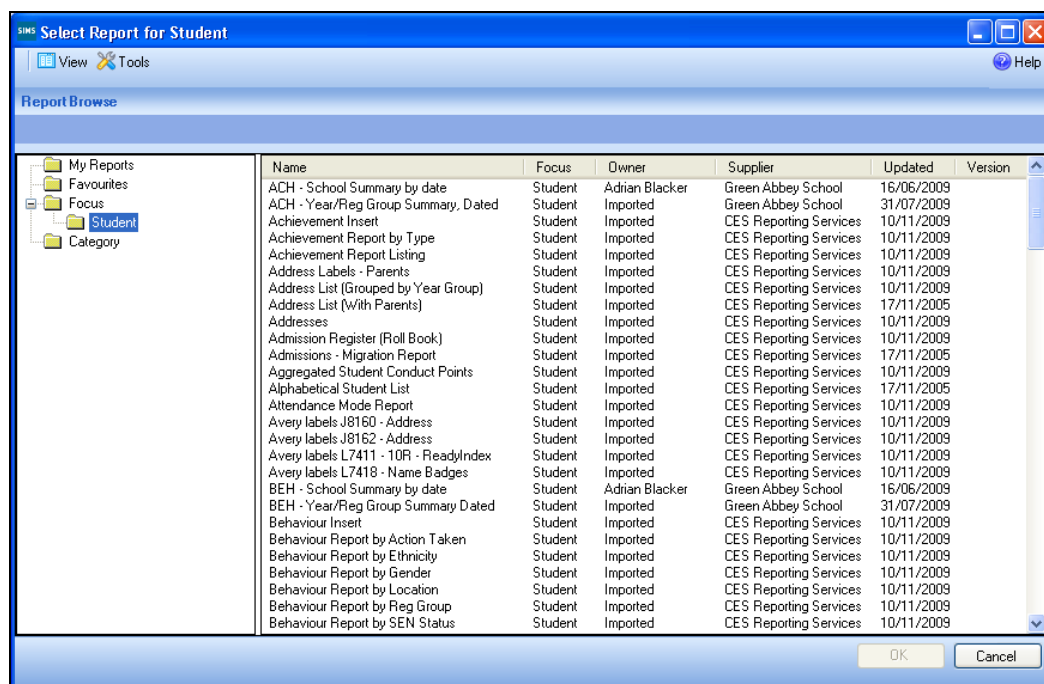


### More Information:

*Moving Between Open Windows on page 15*

## Running Reports

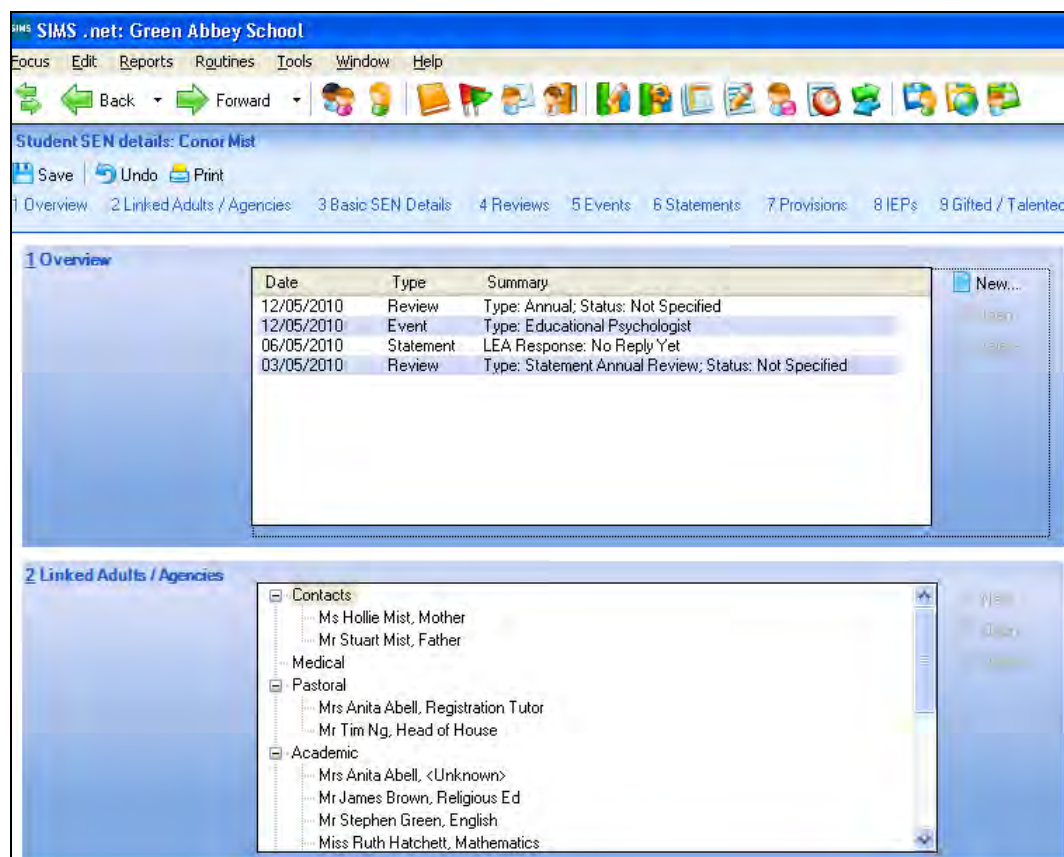
Selecting **Reports** displays the **Select Report for Student** dialog, enabling you to select the report you wish to produce.



Navigate to the required report then click the **OK** button to run the report. For further information on reporting, please refer to the *Reporting in SIMS* handbook.

## Viewing SEN Information

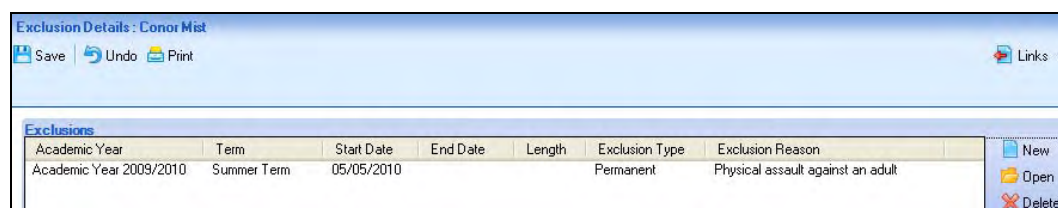
Selecting **SEN** displays any existing special education needs information on the **Student SEN details** page.



Information can be added or edited if you have the appropriate permissions. For further information, please refer to the *Special Educational Needs in SIMS* handbook.

## Viewing Exclusions Information

Selecting **Exclusions** displays any exclusions that have been applied. Double-click the required exclusion to display its details.



Information can be added or edited if you have the appropriate permissions. For further information, please refer to the *Managing Students in SIMS* handbook.

## Viewing Behaviour Information

Selecting **Behaviour Management** displays any recorded achievement or behaviour details recorded against the pupil/student.

**Behaviour Management: Conor Mist**

Save | Undo | Print

1 Academic Year 2 Achievement 3 Behaviour 4 Detention 5 Report Card

**1 Academic Year**

Academic Year: Academic Year 2009/2010

Achievements Points: 1 Behaviour Points: 1 Net Points: 0

No. Of Detentions Recorded: 0 No. Of Report Cards: 0

**2 Achievement**

| Date       | Type                 | Points | Comments | Award       | Award Date |
|------------|----------------------|--------|----------|-------------|------------|
| 12/05/2010 | Sporting Represen... | 1      |          | Certificate | 12/05/2010 |

New  
Open  
Delete

**3 Behaviour**

| Date       | Type     | Role      | Points | Comments | Action              | Action Date |
|------------|----------|-----------|--------|----------|---------------------|-------------|
| 12/05/2010 | Rudeness | Aggressor | 1      |          | Fixed Period Exc... | 12/05/2010  |

New  
Open  
Delete

Information can be added or edited if you have the appropriate permissions. For further information, please refer to the *Managing Students in SIMS* handbook.

## Viewing Timetable Information

Selecting **Timetable** (if this option is available) displays the timetable for the selected pupil/student. The following graphic shows an example from a Secondary school.

| Mon                           | Tue                          | Wed                           | Thu                           | Fri                           |
|-------------------------------|------------------------------|-------------------------------|-------------------------------|-------------------------------|
| Mon:1<br>German<br>MK         | Tue:1<br>English<br>L3 SG    | Wed:1<br>Science<br>A1        | Thu:1<br>Home Economics<br>GR | Fri:1<br>Mathematics<br>RH M5 |
| Mon:2<br>Home Economics<br>GR | Tue:2<br>French<br>MK        | Wed:2<br>Science<br>L3        | Thu:2<br>Home Economics<br>GR | Fri:2<br>French<br>MK L3      |
| Mon:3<br>English<br>SG        | Tue:3<br>CDT:Des & Com<br>EW | Wed:3<br>CDT:Des & Com<br>EW  | Thu:3<br>Technology<br>CH     | Fri:3<br>Technology<br>CH T1  |
| Mon:4<br>Mathematics<br>RH    | Tue:4<br>Science<br>M5       | Wed:4<br>CDT:Des & Com<br>EW  | Thu:4<br>Technology<br>CH     | Fri:4<br>Science<br>S2        |
| Mon:5<br>Religious Ed<br>JB   | Tue:5<br>Mathematics<br>RH   | Wed:5<br>Physical Ed<br>M5 JY | Thu:5<br>PSE<br>AS SH1        | Fri:5<br>English<br>SG H1 E3  |

Changing the **Effective Date** allows a previous or future timetable to be viewed (if available).

A number of options are available to change the way that the information is displayed: **Days** or **Periods**, **Timetable Cycle** or **Current Week**, **Show Subject** or **Show Class Code** and **Highlight Current Cell** or **Highlight Distribution**.

## Viewing Registration Group/Class Information

Selecting **Classes** displays the **Classes for Student** page, listing the classes that the selected pupil/student attends, together with the supervisor for each class. The following graphic shows an example from a Secondary school.

Classes for Student: Conor McK...

New Open Save Undo Print Refresh

Effective Date: 12/05/2010 Refresh

Classes: 11 Open

| Code    | Description    | Supervisor       | Number of Periods |
|---------|----------------|------------------|-------------------|
| 11A/Dc1 | CDT:Des & Com  | Mrs E Waters     | 3                 |
| 11B/Te1 | Technology     | Mr C Hughes      | 3                 |
| 11C/He1 | Home Economics | Miss G Ratcliffe | 3                 |
| 11D/Pe  | PSE            | Mr A Simmons     | 1                 |
| 11y/En1 | English        | Mr S Green       | 4                 |
| 11y/Fr1 | French         | Mr M Konchalski  | 2                 |
| 11y/Ge1 | German         | Mr M Konchalski  | 1                 |
| 11y/Ma1 | Mathematics    | Miss R Hatchett  | 3                 |
| 11y/Pe2 | Physical Ed    | Miss J Young     | 1                 |
| 11y/Re2 | Religious Ed   | Mr J Brown       | 1                 |
| 11y/Sc1 | Science        |                  | 4                 |

Double-clicking an item in the list displays a page that shows all of the pupil/students in the selected class.

## Viewing Attendance Information

Selecting **Attendance** displays the **Student Marks** page for the selected pupil/student.

**Student Marks: Conor Mist - 11D**

Print

**Views**

End Date:

Sessions: ☒ Week View ☐ Month View

Sessions and Lessons: ☐ Day View ☐ Week View

**Attendance marks (Attendance Year 2009/2010)**

| Week Beginning | Mon |    | Tue |    | Wed |    | Thu |    | Fri |    |
|----------------|-----|----|-----|----|-----|----|-----|----|-----|----|
|                | AM  | PM | AM  | PM | AM  | PM | AM  | PM | AM  | PM |
| 01/09/2009     |     |    | #   | #  | -   | -  | -   | -  | -   | -  |
| 07/09/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 14/09/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 21/09/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 28/09/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 05/10/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 12/10/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 19/10/2009     | -   | -  | -   | -  | -   | -  | #   | #  | #   | #  |
| 26/10/2009     | #   | #  | #   | #  | #   | #  | #   | #  | #   | #  |
| 02/11/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 09/11/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 16/11/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 23/11/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 30/11/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 07/12/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 14/12/2009     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 21/12/2009     | #   | #  | #   | #  | #   | #  | #   | #  | #   | #  |
| 28/12/2009     | #   | #  | #   | #  | #   | #  | #   | #  | #   | #  |
| 04/01/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 11/01/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 18/01/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 25/01/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 01/02/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 08/02/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 15/02/2010     | #   | #  | #   | #  | #   | #  | #   | #  | #   | #  |
| 22/02/2010     | #   | #  | -   | -  | -   | -  | -   | -  | -   | -  |
| 01/03/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 08/03/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 15/03/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 22/03/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 29/03/2010     | -   | -  | -   | -  | -   | -  | -   | -  | #   | #  |
| 05/04/2010     | #   | #  | #   | #  | #   | #  | #   | #  | #   | #  |
| 12/04/2010     | #   | #  | #   | #  | #   | #  | #   | #  | #   | #  |
| 19/04/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 26/04/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |
| 03/05/2010     | #   | #  | -   | -  | -   | -  | -   | -  | -   | -  |
| 10/05/2010     | -   | -  | -   | -  | -   | -  | -   | -  | -   | -  |

**Analysis of session marks 01/09/2009 - 11/05/2010**

| Description                   | Sessi... | %   |
|-------------------------------|----------|-----|
| Present                       | 0        | 0.0 |
| Authorised Absence            | 0        | 0.0 |
| Unauthorised Absence          | 0        | 0.0 |
| Possible Attendances          | 290      |     |
| Including                     |          |     |
| Approved Educational Activity | 0        | 0.0 |
| Late before reg closed        | 0        | 0.0 |
| Late after reg closed         | 0        | 0.0 |
| Unexplained Absence           | 0        | 0.0 |

**Session code totals 01/09/2009 - 11/05/2010**

| Code | Description                          | Sessi... | %     |
|------|--------------------------------------|----------|-------|
| -    | All should attend / No mark recorded | 290      | 100.0 |

**Attendance by session 01/09/2009 - 11/05/2010**

|           | AM % | PM % |
|-----------|------|------|
| All       | 0.0  | 0.0  |
| Monday    | 0.0  | 0.0  |
| Tuesday   | 0.0  | 0.0  |
| Wednesday | 0.0  | 0.0  |
| Thursday  | 0.0  | 0.0  |
| Friday    | 0.0  | 0.0  |
| Saturday  | 0.0  | 0.0  |
| Sunday    | 0.0  | 0.0  |

The page displays the attendance marks (if SIMS Attendance is in use) for the current academic year.

## Viewing Assessment Information

If SIMS Assessment is in use, selecting **Assessment** displays the **Student Assessment Results Detail** page.

Student Assessment Results Detail: Conor Mist, 11D

Print

1 Results

1 Results

Filters

From Date: 01/09/2009 To Date: 12/05/2010 Display All ☐ Refresh

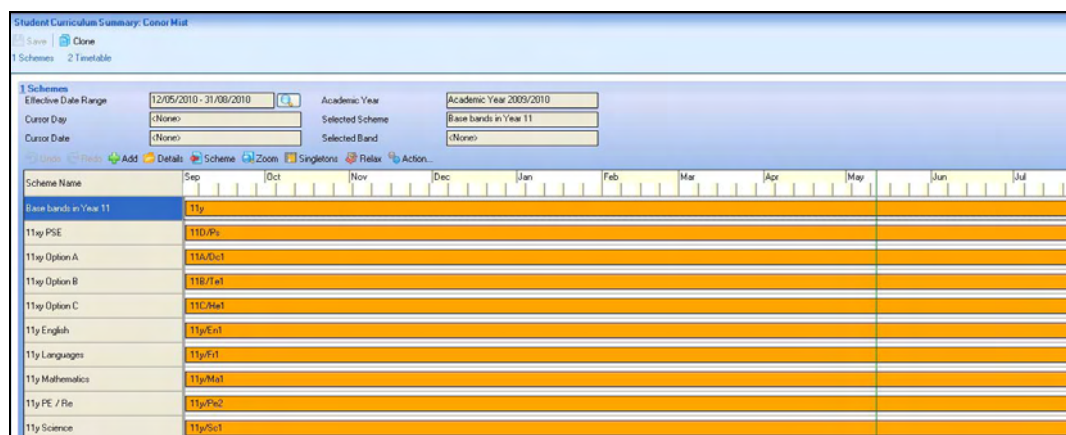
| Aspect Name                         | Result Date | Resultset           | Type          | Result |
|-------------------------------------|-------------|---------------------|---------------|--------|
| GA KS4 Attain GCSE English          | 10/09/2009  | Year 10 Autumn Term | Grade         | D      |
| GA KS4 Attain GCSE English          | 10/09/2009  | Year 10 Spring Term | Grade         | D      |
| GA KS4 Attain GCSE English          | 10/09/2009  | Year 10 Summer Term | Grade         | C      |
| GA KS4 Attain GCSE English          | 10/09/2009  | Year 11 Autumn Term | Grade         | C      |
| GA KS4 CAT English                  | 10/09/2009  | KS4 Target          | Grade         | D      |
| GA KS4 CAT French                   | 10/09/2009  | KS4 Target          | Grade         | D      |
| GA KS4 CAT Maths                    | 10/09/2009  | KS4 Target          | Grade         | C/D    |
| GA KS4 CAT PE                       | 10/09/2009  | KS4 Target          | Grade         | C/D    |
| GA KS4 CAT Sci Biology              | 10/09/2009  | KS4 Target          | Grade         | D      |
| GA KS4 CAT Sci Chemistry            | 10/09/2009  | KS4 Target          | Grade         | D      |
| GA KS4 CAT Sci DA                   | 10/09/2009  | KS4 Target          | Grade         | D      |
| GA KS4 CAT Sci Physics              | 10/09/2009  | KS4 Target          | Grade         | D      |
| GA KS4 GCSE Target English          | 10/09/2009  | KS4 Target          | Grade         | D      |
| GA KS4 GCSE Target French           | 10/09/2009  | KS4 Target          | Grade         | D      |
| GA KS4 GCSE Target Geography        | 10/09/2009  | KS4 Target          | Grade         | D      |
| GA KS4 GCSE Target History          | 10/09/2009  | KS4 Target          | Grade         | D      |
| GA KS4 GCSE Target Maths            | 10/09/2009  | KS4 Target          | Grade         | C/D    |
| GA KS4 GCSE Target Science Double   | 10/09/2009  | KS4 Target          | Grade         | D      |
| GA KS4 On Target GCSE Eng           | 10/09/2009  | Year 10 Autumn Term | Grade         | 0      |
| GA KS4 On Target GCSE Eng           | 10/09/2009  | Year 10 Spring Term | Grade         | 0      |
| GA KS4 On Target GCSE Eng           | 10/09/2009  | Year 10 Summer Term | Grade         | A      |
| GA KS4 On Target GCSE Eng           | 10/09/2009  | Year 11 Autumn Term | Grade         | A      |
| GA KS4 Residual GCSE Eng            | 10/09/2009  | Year 10 Autumn Term | Marks-Integer | 0      |
| 2 Levels Progress English           | 03/09/2009  |                     | Grade         | 7      |
| 2 Levels Progress Maths             | 03/09/2009  |                     | Grade         | 7      |
| 2 Levels Progress Science           | 03/09/2009  |                     | Grade         | 7      |
| KS3 English Predicted Level (Upper) | 03/09/2009  |                     | Grade         | 7      |
| KS3 Maths Predicted Level (UQ)      | 03/09/2009  |                     | Grade         | 8      |
| KS3 Science Predicted Level (Upper) | 03/09/2009  |                     | Grade         | 7      |

By default, the date range is set from the beginning of the current academic year to today's date. To specify a different date range, enter the required dates in the **From Date** and **To Date** fields, or click the appropriate **Calendar** button to select the required date from the calendar, then click the **Refresh** button.

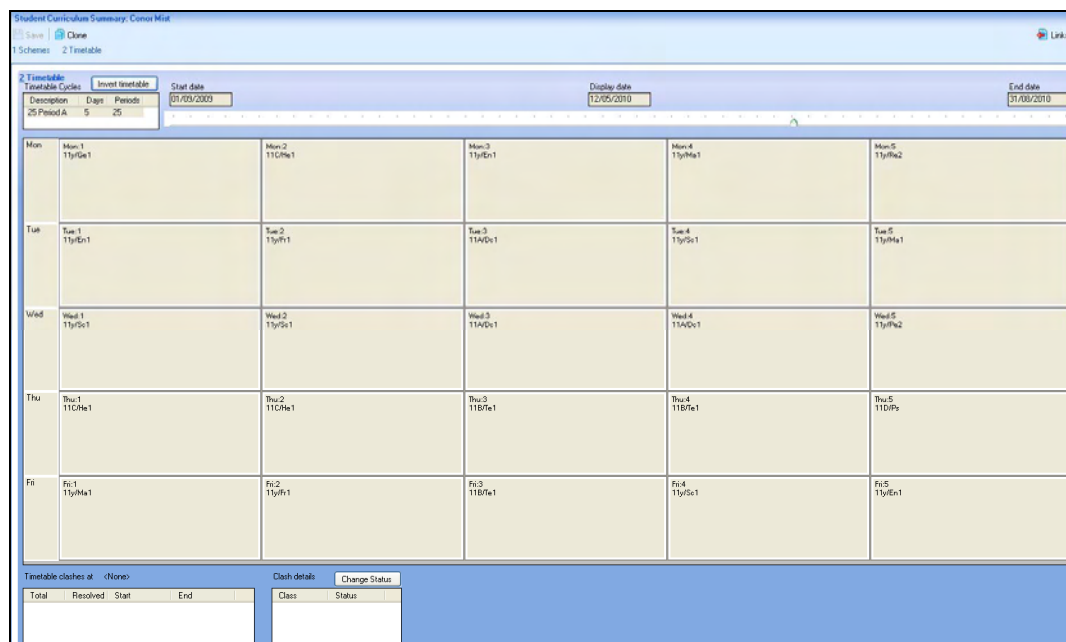
Also by default, selected pupil/student result details are displayed in **Result Date** order, i.e. the most recent result is displayed at the top of the list. The order can be reversed by clicking the **Result Date** column header. The details can also be ordered by **Aspect Name**, **Resultset**, **Type** and **Result** by clicking the appropriate column header.

## Viewing Curriculum Information

If Nova-T and Academic Management are in use, selecting **Student Curriculum** displays the **Student Curriculum Summary** page (once an effective date range has been selected). The following graphic shows an example from a Secondary school.



A **Timetable** panel is also available, which displays the timetable for the selected pupil/student. Any timetable clashes are also displayed. The following graphic shows an example from a Secondary school.



For further information, please refer to the *Academic Management in SIMS* handbook.



# 04 | Common Processes

Entering and Selecting Dates ..... 29

Adding and Editing Pupil / Student Data ..... 35

## Entering and Selecting Dates

SIMS enables the entry of dates in various formats, but automatically reformats them to be displayed in dd/mm/yyyy format once the cursor leaves the date field.

It is possible to enter dates in any of the following formats:

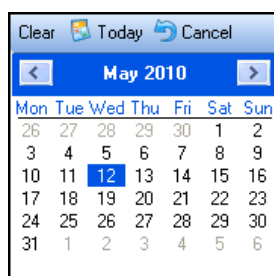
| Date Format | Example     |
|-------------|-------------|
| dd/mm/yyyy  | 01/01/2010  |
| dd/mm/yy    | 01/01/10    |
| dd-mm-yyyy  | 01-01-2010  |
| dd-mm-yy    | 01-01-10    |
| ddmmmyyyy   | 01Jan2010   |
| dd mmm yy   | 01 Jan 10   |
| dd mmm yyyy | 01 Jan 2010 |

Alternatively, you can select a date from the calendar whenever the **Calendar** button is displayed.



*Calendar button*

Click the **Calendar** button to display the calendar.



With the calendar displayed, the following options are available.

### Selecting today's date

Click the **Today** button at the top of the calendar.

### Select a specific date in the month displayed

Double-click the required date.

### Move forward a month at a time

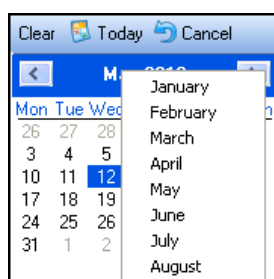
Click the right arrow button.

### Move backwards a month at a time

Click the left arrow button.

### Select a different month

Click the **Month** label and select the required month from the pop-up menu.



### Change the year

Click the year to display up and down arrows.

Click the up arrow button to scroll to future years or the down arrow to scroll to past years. The dates in the calendar change according to the year selected.

### Clear the date entered

Click the **Clear** button.

### Close the calendar

Click the **Cancel** button.

The selected date is displayed in the date field in dd/mm/yyyy format as soon as you exit the calendar.

## Selecting Effective Dates

The **Effective Date** field available in many areas of SIMS reflects the date on which the displayed data is based. It is therefore possible to view historical or future data (depending on what data is being viewed).

The **Effective Date** usually defaults to today's date but can be changed by manually entering or selecting a date from the calendar. For more information, please see *Entering and Selecting Dates* on page 29.

Once the **Effective Date** has been changed, click the **Refresh** or **Go** button (whichever is displayed) to refresh the data.

## Printing Information from SIMS

Many areas of SIMS display information that can be printed. Some examples include:

- The list of records returned in a browser.
- A pupil/student or staff record.
- Assessment, Timetable and Attendance data accessed via the **Links** button.
- Agency information, such as the details of a doctor's surgery.
- Room information.

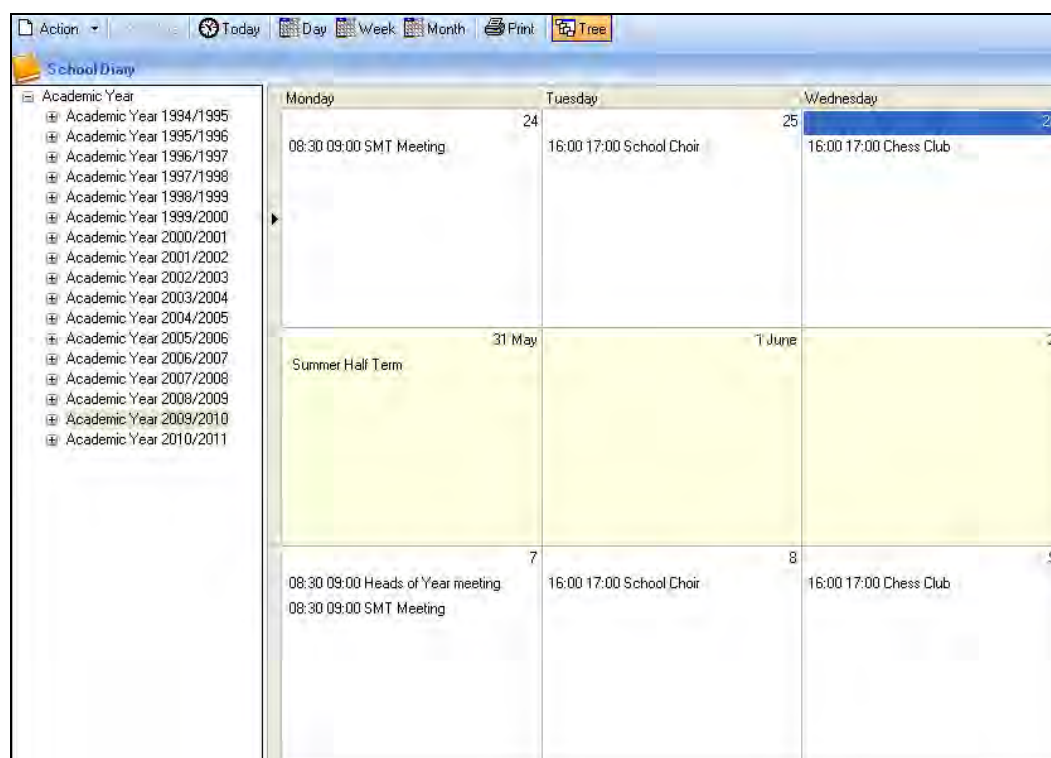
The ability to print is identified by the presence of the **Print** button on the toolbar. If print functions are not available, the **Print** button is disabled.

When available, click the **Print** button to print information in the selected area.

## Using the School Diary

The School Diary is accessible to all users. Users with the appropriate permissions can add events to the diary. These events can be viewed by all users and may relate to staff meetings, parent evenings, etc. For more information, please refer to the *Defining the Pastoral Structure* chapter of the *Setting up and Administering SIMS* handbook.

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



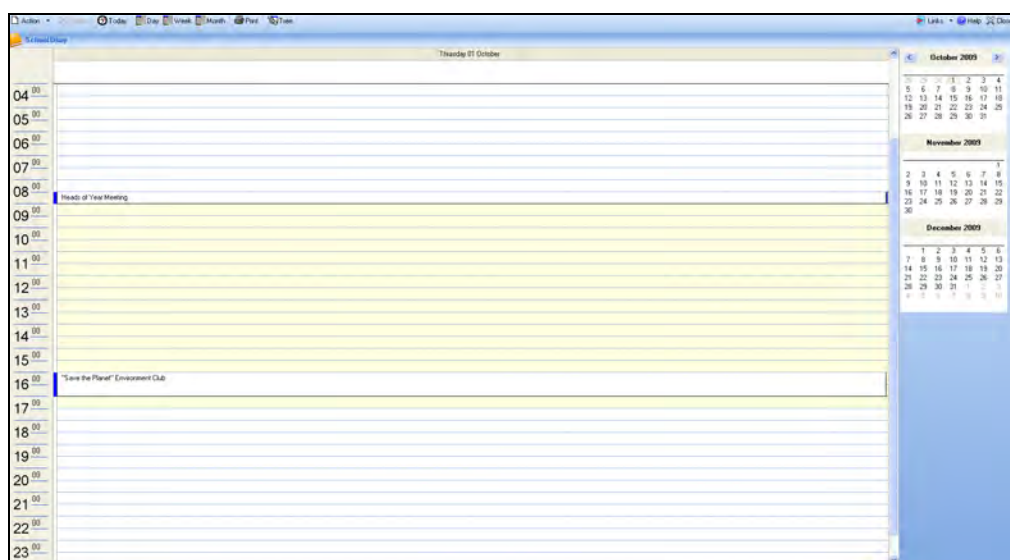
The School Diary is based on academic years. By default, the current academic year is displayed, but this can be changed to view previous and future academic years (providing future years have been defined). To select a different year, use the 'tree view' on the left-hand side.

You can view events that take place on a specific **Day**, **Week** or **Month** by clicking the appropriate button at the top of the page.

To increase the visible size of the **School Diary** page, the **Academic Year** panel can be hidden by clicking the **Tree** button located at the top of the page. Clicking the **Tree** button again displays the **Academic Year** panel.

## Changing the View to Today

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

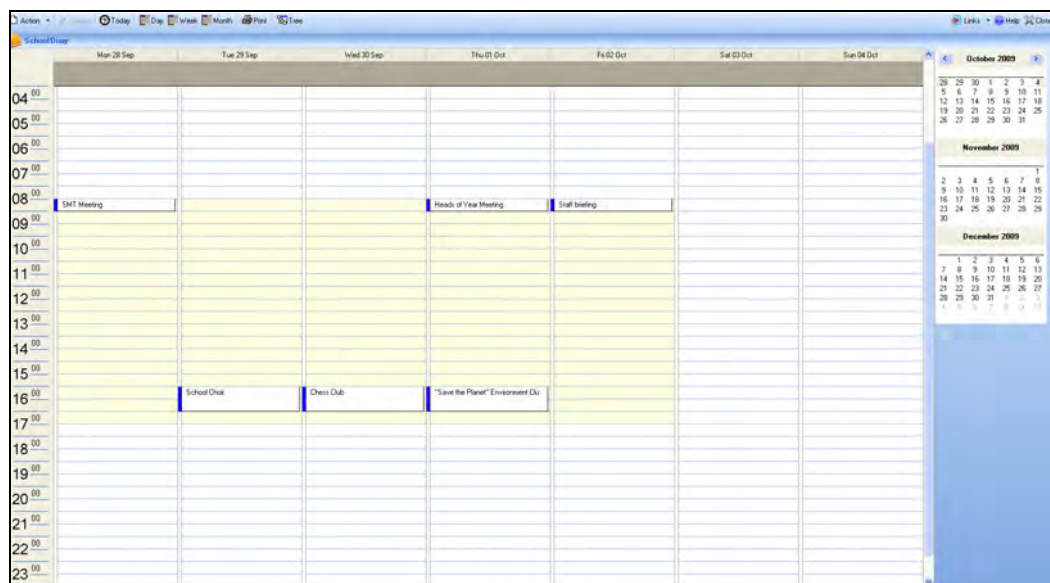


## Changing the View to a Day

Click the **Day** button on the toolbar to switch to a single day view. Select the day you wish to view by clicking the required date using the calendar on the right-hand side of the page.

## Changing the View to a Week

Click the **Week** button on the toolbar to switch to a view of the week.

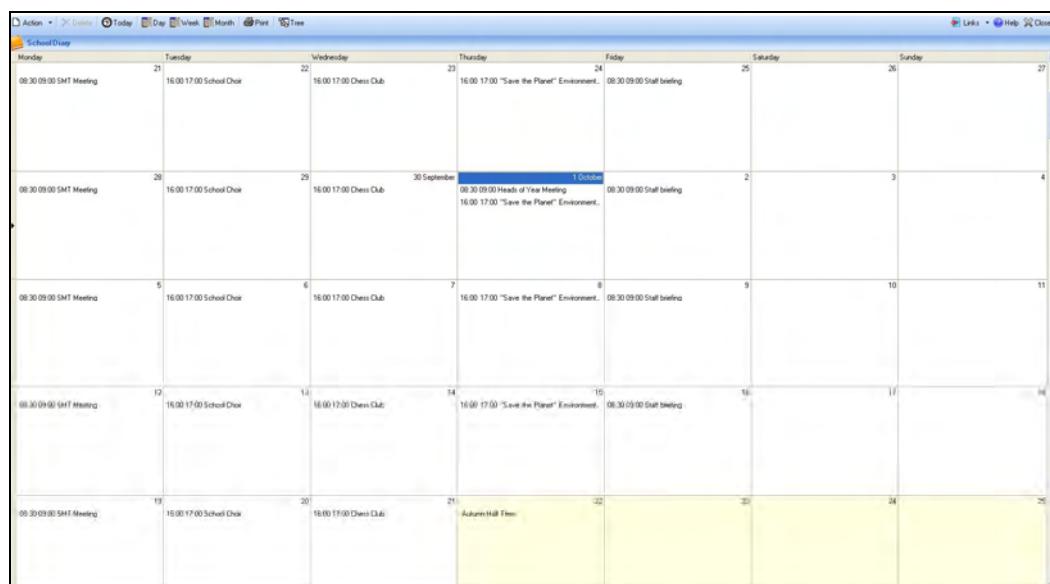


**NOTE:** Boarding schools who selected the appropriate registration sessions when SIMS was first set up will also see weekends.

You can change the week displayed by selecting the appropriate date from calendar on the right-hand side of the page.

## Changing the View to a Month

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



You can scroll down through the remaining months of the academic year using the scroll bar on the far right-hand side of the page.



**NOTE:** The calendar that is usually displayed on the right-hand side of the page is not available when the view is set to display a month.

## Adding Events to the School Diary

Users with the appropriate permissions can add events to the School Diary. These events are visible to all users. Additionally, all users can add events to their own view of the School Diary, so that hospital appointments, etc. can be recorded.



**NOTE:** There are several methods of adding events to the School Diary, depending on the view that is currently displayed.

1. Select **Focus | School | School Diary** to display the **School Diary** page.
2. The following methods can be used to create a school event using the **School Event** dialog. Please note that an event dialog is named according to the type of event that is being created.
  - Click the **Action** button to display the **School Event** dialog.
  - Click the drop-down arrow adjacent to the **Action** button and select **Create New Event | User Defined Event**, or select a different event type from the drop-down menu.



- Double-click any date in the School Diary (in **Day**, **Week** or **Month** view).
- Right-click anywhere on the School Diary (in **Day**, **Week** or **Month** view) then select **New School Event**. 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 is the text that will be displayed on the School Diary.
4. Select the appropriate **Category** from the drop-down list.

5. If the event is planned for an entire day, select the **All day event** check box. This hides the time drop-down lists.
6. 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 then select the **Start Time** from the drop-down list.
7. Specify the **End Time** details for the event by entering the required date (if different from the default) or click the **Calendar** button to select the required date then select the **End Time** from the drop-down list.
8. 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 marked as **Private** are visible only from your personal **Home Page**. Personal appointments and days off can be added to your individual School Diary view as reminders, etc.
9. Click the **OK** button to save the event.

For more information, please refer to the *Setting up the School Diary* chapter of the *Setting up and Administering SIMS* handbook.

## Adding and Editing Pupil / Student Data

There are various methods of adding pupil/student data in SIMS. For further information, please refer to the *Managing Pupil/Student Information in SIMS* handbook.



# 05 Customising SIMS

## Customising the User Interface ..... 37

### Customising the User Interface

The look and feel of SIMS can be changed to suit your requirements. For example, you can change the colours of screen areas and the visual display.

#### Changing Screen Area Colours

The colours system for various areas of SIMS can be changed, if required.

Select **Tools | Setups | User Options** to display the **Customisation Options** page.

**Customisation Options**

Save | Undo

1 SIMS .NET Colours   2 External Files   3 Visual Settings   4 Screen Labels

**1 SIMS .NET Colours**

Invalid Value Background Colour: [Red]   Invalid Value Text Colour: [Black]   Unusual Value Background Colour: [White]   Unusual Value Text Colour: [Red]

Colour Selection Preview

Group Boxes

Invalid Value: [Red]   Unusual Value: [White]

**2 External Files**

Background Image for Main Menu: [Text Box]   [Image Icon]

Mapping hyperlink (requires postcode suffix): <http://www.multimap.co.uk/map/browse.cgi?pc=> [Dropdown]

**3 Visual Settings**

Description

- ☒ Automatically hide lists once a choice has been made
- ☒ Use striped lists
- ☐ I use a slow connection to the database, automatically filter out large items such as pictures
- ☒ Ask for confirmation when closing SIMS .net
- ☒ Display the Focus Bar

**4 Screen Labels**

Display: [User customisation] [Dropdown]

Selected Language: [English] [Dropdown]   [Customise Menu]

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.
- **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.

Click the drop-down button adjacent to the type of colour you wish to change to display the **Choose a color** dialog. Select a new colour and click the **Save** button to save the changes.



## Specifying the Visual Settings

The display options for specific items can be specified using the **Visual Settings** panel on the **Customisation Options** page.

Select **Tools | Setups | User Options** to display the **Customisation Options** page.

The visual settings are as follows:

| Item                                                 | Description                                                                                                                                                                                                                                                                                                                                                                                              |
|------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Automatically hide lists once a choice has been made | This option allows you to specify whether you wish to close a browser once a selection has been made. This is particularly beneficial in the pupil/student and staff functional areas, as it leaves more space on the screen to view the appropriate details. This option is automatically selected, but you can deselect the check box if you would prefer the browsers to remain open after selection. |

| Item                                                                                           | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use striped lists                                                                              | <p>This option allows you to specify whether you would like lists, report rows, etc. to be 'striped' so that it is easier to identify the data on a line. This would be particularly useful for lists containing a large number of lines, where the line colours will alternate between two colours, ensuring that it is easy to distinguish between the data on each line of the list, report, etc.</p> <p>This option is automatically deselected, but you can select the check box if you would like to produce colour striped lists where applicable. This must be used in conjunction with the <b>Stripe colour for lists</b> option in the <b>SIMS .NET Colours</b> panel.</p> |
| I use a slow connection to the database, automatically filter out large items such as pictures | <p>Allowing large items to be filtered out of view minimises the impact on the performance of your machine. Items that can be filtered out include pupil/student and staff photographs. This option is automatically deselected, but you can select the check box if you would prefer the items to be filtered in SIMS.</p>                                                                                                                                                                                                                                                                                                                                                          |
| Ask for confirmation when closing SIMS .net                                                    | <p>If you select this check box, SIMS asks for confirmation before it closes.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Display the Focus Bar                                                                          | <p>If this check box is selected, the Focus Bar at the top of the page is hidden.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |



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