



Discover User Guide

Applicable to 7.138 Onwards

CAPITA

Handbook



Revision History

Version	Change Description	Date
7.138 v-2.0	Installation Process Simplified	28/06/11

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Providing Feedback on Documentation

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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 | Getting Started with Discover

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Overview

Discover has been developed to enable schools to analyse their SIMS data and to display the results in a variety of graphical formats, e.g. bar graphs, progression line graphs, pie charts and Venn diagrams.

Discover draws the data from a data warehouse which is an extract of the SIMS SQL database. The Discover data warehouse is designed to manage a high level of data traffic so that several graphs can be created and viewed at the same time for the purposes of data comparison. It is possible to drag and drop various data items from one graph on to another to create a compilation graph as a Venn diagram.

Additional Documentation

Please ensure that you have read and understood the *Discover Typical Installation Guide* before attempting to use Discover.

For hosted sites and advanced installations, please ensure that you have read and understood the *Discover Hosted Technical Guide* to enable you to set your system up correctly.

As the software develops further in the future, additional functionality and predefined graphs will be incorporated.

Using the Discover SIMS Configuration Utility

Predefined graphs have been provided with default data items specified by Capita SIMS Ltd. However, as all schools are different, a utility has been provided to enable schools to specify some of their own data items so that you can measure and analyse the data as you wish.

The **Discover SIMS Configuration** utility provides the ability to change or customise different areas within Discover. These areas mainly concern the display and interval ranges of specific graphs but it is also possible to specify the analysis depth for Post Code searches and the offset timeframe for the SIMS to Discover Transfer routine. Schools can also use the **Discover SIMS Configuration** utility to specify the information to be included in the creation of their own Assessment graphs.

The **General Settings** should be specified before initial use of Discover but they can be changed at any time if the relevant graphs are not displaying the data in the manner that you require or if the **Transfer** process needs to be run immediately instead of waiting for the specified time slot.

There are several pages within the **Discover SIMS Configuration** utility and each page enables the configuration of a different element of data. As a result of this, various user permissions are required for the different areas. Further information relating to the customisation of the Assessment areas can be found in *Using the Discover SIMS Configuration Utility to Create Assessment Graphs* on page 61.

Permissions

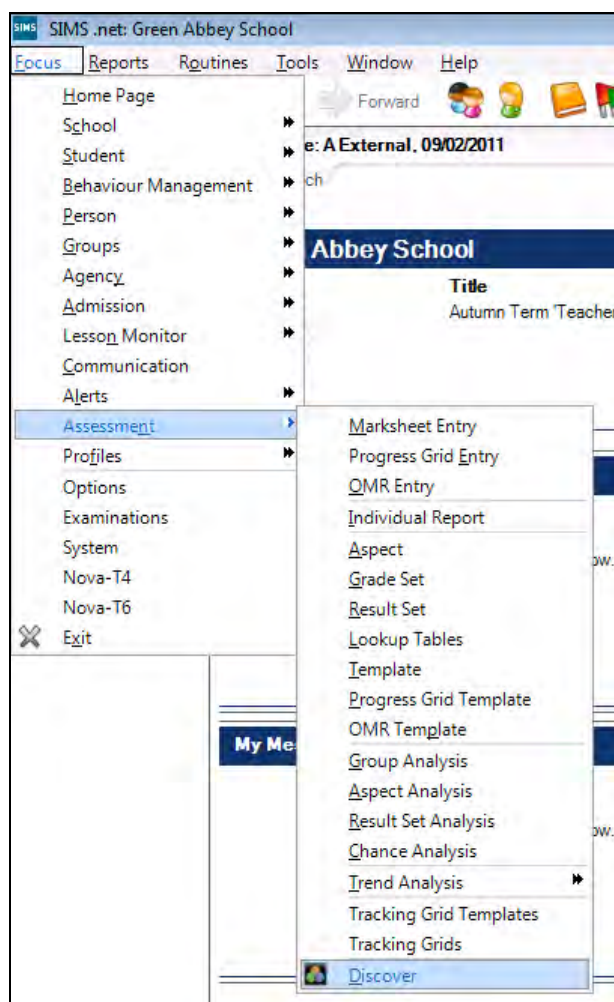
It is only possible to see data items in Discover for which you have been granted suitable permissions in SIMS.

- The following user roles can specify and amend the **General Settings** page in the **Discover SIMS Configuration** utility:
 - Senior Management Team members
 - School Administrators
 - Administration Assistants
 - System Managers.
- The following user roles can initiate the **Transfer** process from the **Discover SIMS Configuration** utility:
 - Senior Management Team members
 - School Administrators
 - Administration Assistants
 - Assessment Coordinators
 - System Managers.

- The following user roles can add and amend aspects, result sets and Assessment graph parameters in the **Selected Aspects**, **Selected Result Sets** and **Assessment Graphs** pages in the **Discover SIMS Configuration** utility:
 - Senior Management Team members
 - Assessment Coordinators.

Logging Into Discover via SIMS

1. Open SIMS in the usual way.
2. Select **Focus | Assessment | Discover**.



Alternatively, click the **Discover** button on the **SIMS Tool Bar**.



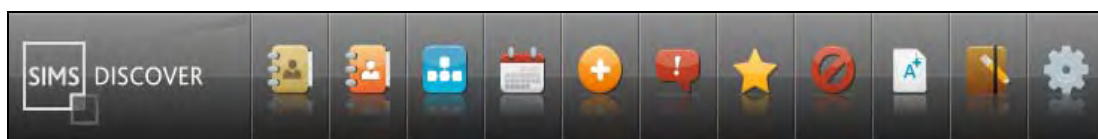
Discover button

02 Navigation in Discover

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Introduction

The predefined graphs that are provided with Discover are accessible from a series of **Category** buttons on the **Discover Application Bar**.



These include options such as **Pupil** totals, **SEN**, **Behaviour** and **Achievement** records and **Attendance** statistics.



Pupil button



PreAdmission button



Pastoral button



Attendance button



SEN button



Behaviour button



Achievement button



Exclusions button



Assessment button



Custom Graphs button



Groups button

Once created, graphs can be shared amongst other members of staff, governors and members of the Senior Management Leadership Team. It is also possible to export graphs to a .CSV file.

It is possible to rotate a graph to view the reverse side which summarises a breakdown of the data details, e.g. the names, date of birth, admission numbers of the pupil/students and their memberships of the various data items that are included in the graph.

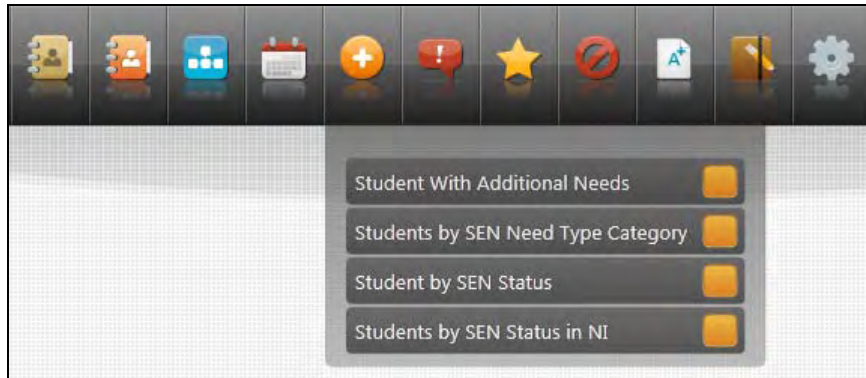
Opening a Graph

1. Click one of the **Category** buttons on the **Discover Application Bar**. In the following example, the **SEN** button has been clicked.



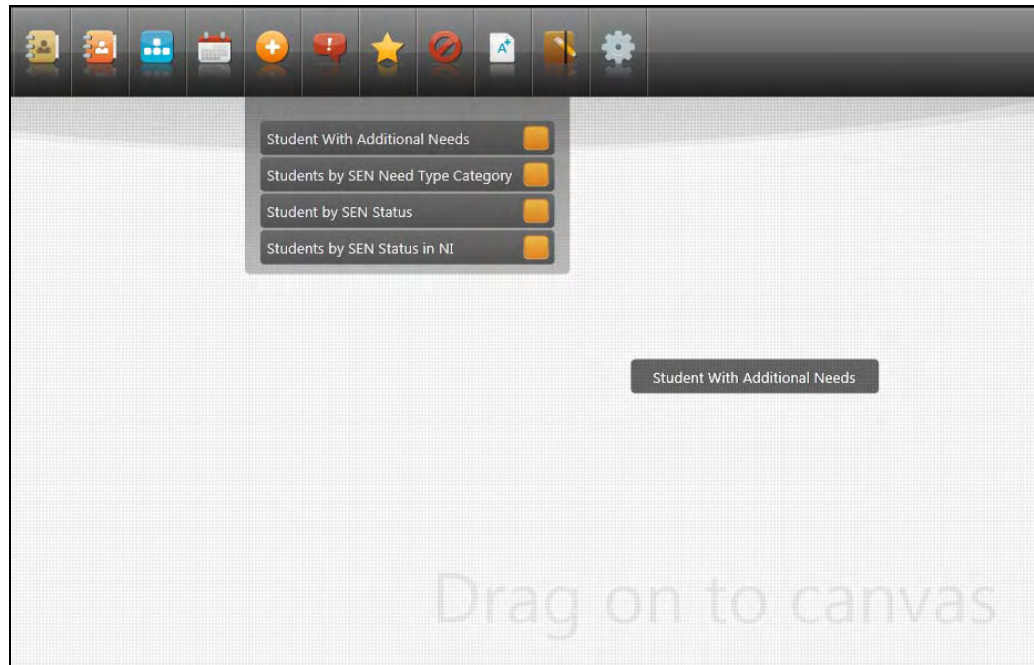
SEN button

A drop-down list of available graph names is displayed.



2. Click one of the graph names with the mouse and drag the graph name or the associated orange box onto the Discover canvas.

The Discover canvas is the white background area of the application. Looking closely at the canvas, the words **Drag on to canvas** can be seen in ghosted grey text. The canvas is where the graphs and groups are created and is essentially the work space area of Discover.

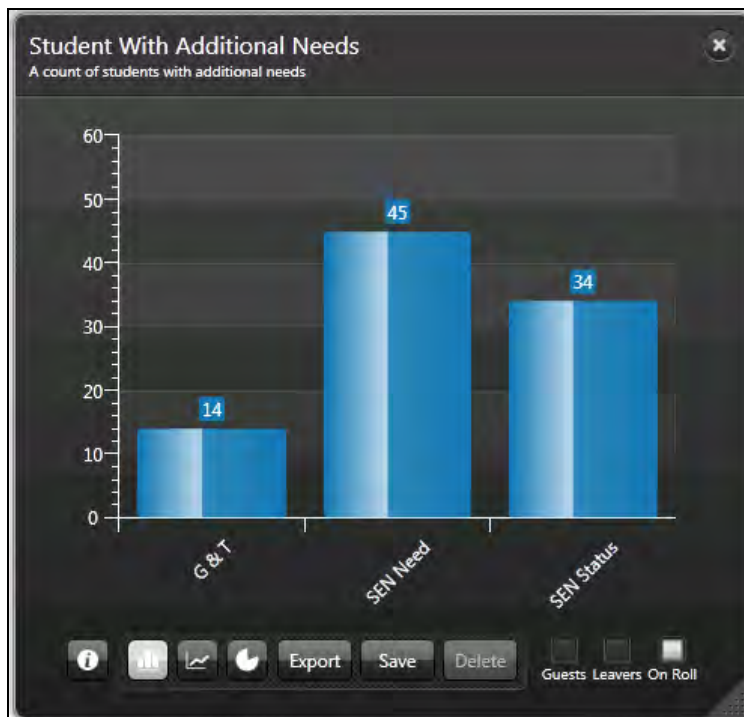


3. Release the mouse button to enable the data to be compiled as a graphical output.



TIP: For users with a touch screen, a stylus or a finger can be used in a similar way to the mouse to drag graphs onto the Discover canvas and to move them around.

In most instances, the graphical output is initially created as a bar graph. Please refer to *Graphical Outputs Available in Discover* on page 26 for further information on changing the type of graphical output.



Moving a Graph Around the Canvas

Once a graph has been created, it is possible to move it around the canvas to enable you to maximise the space available. This gives you the opportunity to drag and drop additional graphs onto the canvas at the same time.

1. Click into the title area of the graph and drag it around the canvas.
2. Release the mouse button to position the graph in the required location.
3. If the graph is positioned so that you cannot see the **Close** button or the graph title, click onto the Discover canvas and move the mouse to scroll and view the graph.

Resizing a Graph

Once a graph is compiled on the canvas, it can be stretched to maximise its size and to enable you to see the data items more clearly.

1. Click a border or a corner of the graph until the two-way arrow cursor is displayed.
2. Drag the cursor in the required direction to increase or decrease the size of the graph on the canvas.



IMPORTANT NOTE: There is a limit to the size that the graph can be reduced to whilst still displaying the data in a readable form.

Bringing a Graph to the Front of the Canvas

If you have several graphs or groups open on the Discover canvas at the same time and you want to view a graph or a group that is hidden 'beneath' several others, click anywhere on the perimeter of the required graph or group to bring it to the front of the canvas.

Using the Slide Bar to View all the Data Points on the x Axis

Where a graph has a large number of data points on the x axis, for example, a data point for each Registration Group in the **Behaviour Points by Registration Groups** graph, a slide bar is available at the bottom of the graph.

This enables you to view all the data points on the x axis by moving the slide bar backwards and forwards.

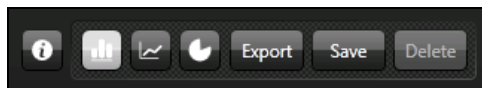


The previous graphical representation does not contain any data in the data points but has been used to demonstrate the slide bar only.

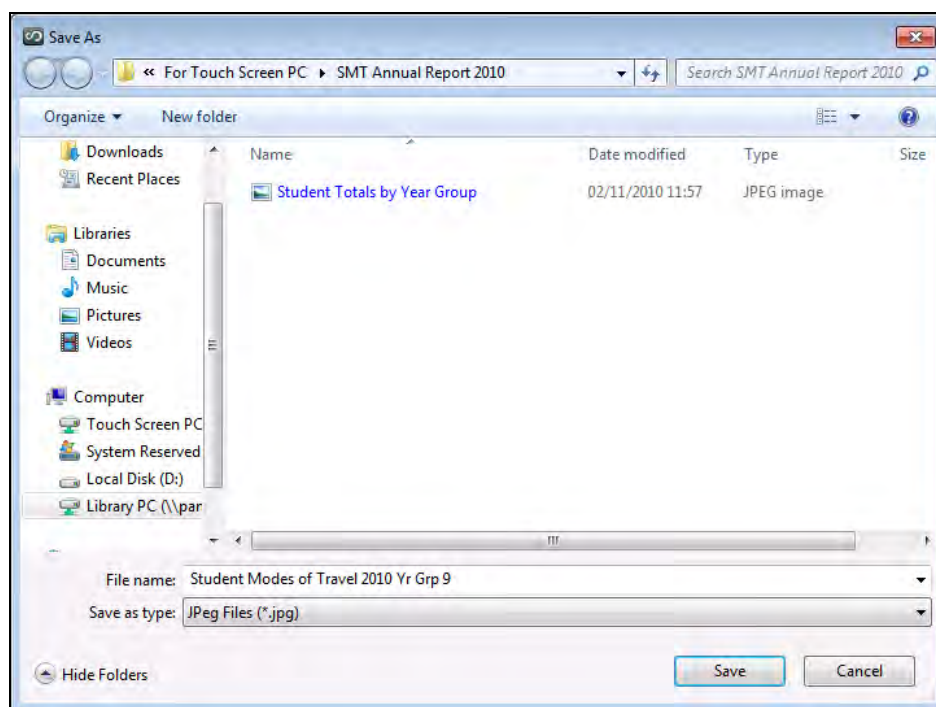
Exporting a Graph as an Image

If you want to share the graphical output of data with other colleagues, governors or members of the Senior Management Team, it is possible to save a graph as an image. This enables you to insert the image into correspondence or reports and in the case of Behaviour graphs, even letters to parents.

1. Click the **Export** button on the front of the graph that you are viewing.



The **Save As** dialog is displayed.



2. Browse to a suitable storage location and enter an appropriate **File name** for the graphical image.

The **Save as type** field defaults to Jpeg Files (*.jpg) but it is possible to save the image as a Bitmap File (*.Bmp) or as a Png File (*.Png).

3. Click the **Save** button.



More Information:

Please refer to *Graphical Outputs Available in Discover* on page 26 for further information on changing the type of the graph.

Viewing the Reverse Side of a Graph

All graphs can be rotated to display the reverse side which reveals a summary of the underlying data that the graph is composed of. The summary of the data is displayed in a tabular format. There are a number of different standard formats used for the reverse side of the predefined graphs depending on the data structure used within the graph.

Rotating a Graph

Click the **information** button on the front of the graph that you are viewing.



Information button

The graph is rotated by 180 degrees and the underlying data is displayed.

	Forename	Surname	DOB	Registration
	Michael	Varwood	01/11/1997	8A
	Petra	Yates	12/11/1997	8B
	William	Yates	09/10/1992	N

Student count: 1031



TIP: After rotating a graph to view the details, click on a column heading to change the sort order of the pupil/students.

To enable you to view all of the information, the reverse side of the graph can be resized so that all the column headings are visible.

Student Totals by Year Group
A count of students in each year group

	Forename	Surname	DOB	Registration Group	Enrolment Status	Admission Number	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Total
	Michael	Yarwood	01/11/1997	8A	On Roll	003715		☒						
	Petra	Yates	12/11/1997	8B	On Roll	003758		☒						
	William	Yates	09/10/1992	N	On Roll	002896							☒	
							161	160	164	167	167	103	109	1031

Student count: 1031

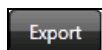
Export

View the entire list of pupil/students by moving the slider up and down on the right-hand side of the reverse side of the graph.

Exporting the Details on the Reverse Side of a Graph to a .CSV File

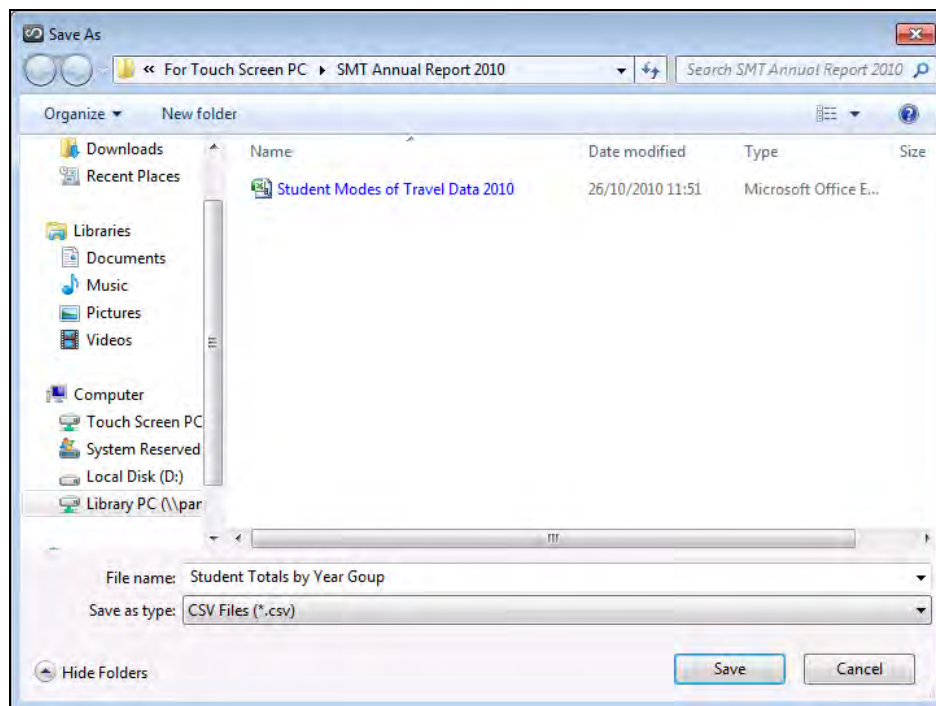
You may wish to export the data details from the reverse side of a graph to a spreadsheet so that you can further analyse or monitor trends.

1. Click the **Export** button on the reverse side of the graph.



Export button

The **Save As** dialog is displayed.



2. Browse to a suitable storage location and enter an appropriate **File name** for the data details.

The **Save as type** field defaults to CSV File (*.csv). It is not possible to save the data details in another format at present.

3. Click the **Save** button to load the data details into a comma separated file in Microsoft® Excel.

	A	B	C	D	E	F	G	H	I	J
1	Forename	Surname	DOB	Registrati	Enrolmen	Admissior	Year 8	Year 9	Year 10	Year 11
2	Jimmy	Abbey	#####	8A	On Roll	3599	TRUE			
3	Nigel	Aitken	#####	11E	On Roll	3111				TRUE
4	Amina	Akram	#####	11A	On Roll	3115				TRUE
5	Chaz	Ambrose	#####	10B	On Roll	3274			TRUE	
6	Dennis	Amis	#####	11C	On Roll	3120				TRUE
7	Robin	Arkle	#####	11B	On Roll	3128				TRUE
8	Angela	Ashfield	#####	10A	On Roll	3280			TRUE	
9	Harry	Auden	#####	Q	On Roll	2890				
10	Alison	Austin	#####	11D	On Roll	3131				TRUE

The data details can be sorted and manipulated as required.

Graph to Graph Filtering

When multiple graphs are open on the canvas, it is possible to further refine the results displayed in a selected graph by dragging and dropping a data item from one graph onto another graph.

For example, you are viewing the **Student Totals by Key Pastoral Factors** graph and the **Student Totals by Gender** graph and would like a further break down of the pastoral factor results that focus on the girls in Year 7.



In the **Student Totals by Gender** graph, select the colour coded data item for the girls in Year 7 and drag and drop it onto the **Student Totals by Key Pastoral Factors** graph.



As you drag the data item, the cursor displays the name of the data item that you have selected as an additional filter.



NOTE: When you drop a data item onto another graph, please ensure that the cursor is within the area of the **x** and **y** axis.

Once the data item has been dropped onto the selected graph, the results in the graph are re-calculated to incorporate the new filter.

An information caption advises you that the re-calculation is **Adding Series** to the current results.

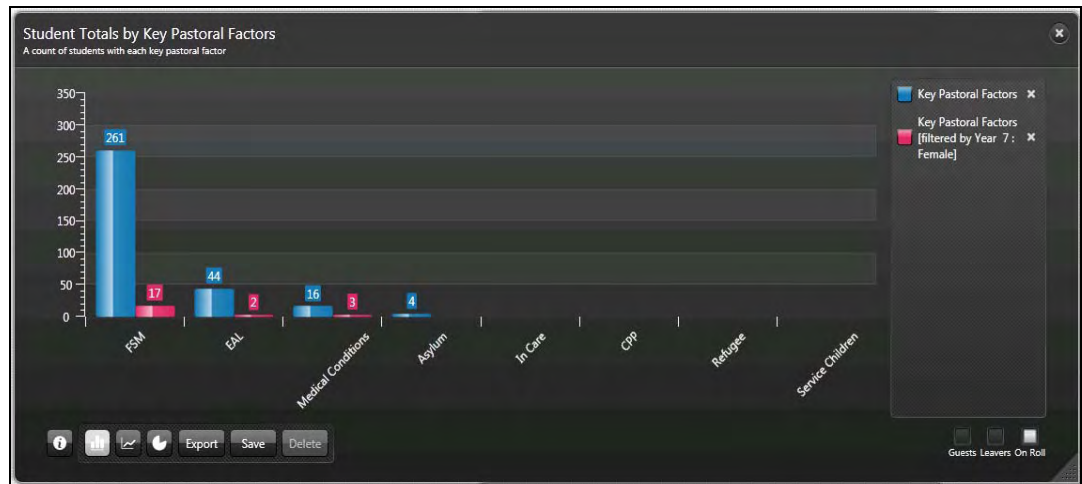


Once the re-calculation is complete, an additional data point is added to the existing results. A panel on the right-hand side of the selected graph displays a key of the filters that comprise the results.

In the example, this shows that of 261 pupil/students in the school who are recorded as taking Free School Meals (FSM), 17 of these are girls in Year 7, of the 44 children who speak English as an Additional Language (EAL), 2 of these are girls in Year 7, etc.



It may be necessary to expand the graph by stretching it across the canvas so that you can view all the data points that are obscured beneath the key panel.



It is also possible to remove the original results from the selected graph and to filter the data points solely on the filter that you have selected.

If you want to remove the original results from the selected graph, select the relevant data point name from the key panel and click the **x** button to remove the filter.

The graph is re-calculated and an information caption advises that the re-calculation is **Removing Series** from the current results.



The resulting graph still displays the key pastoral factors but solely from the focus of girls in Year 7.



If you want to remove the additional data item from the selected graph *instead* of removing the original results, select the relevant data point name from the key panel and click the x button to remove the filter.



The graph is re-calculated and an information caption advises you that the re-calculation is **Removing Series** from the current results.

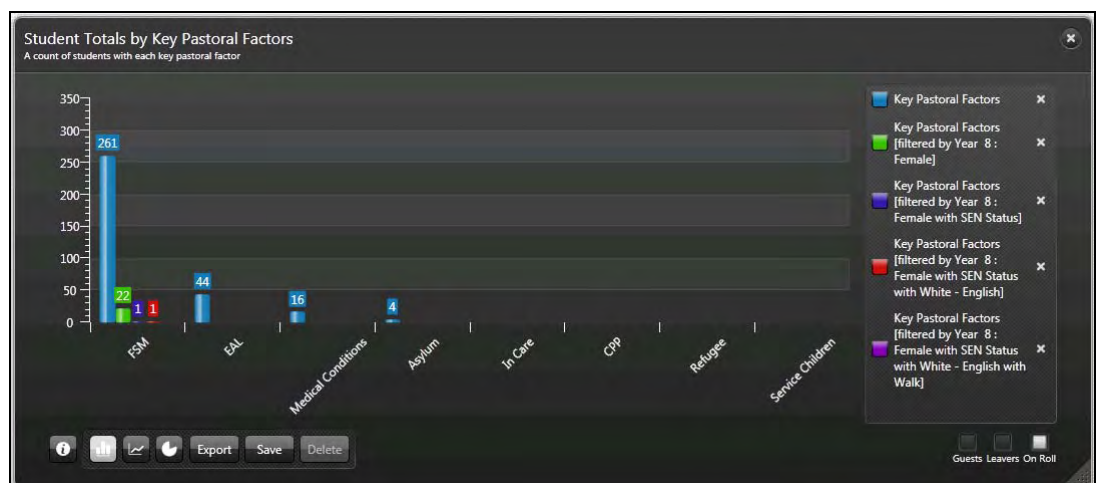
The graph is restored to its original condition.



NOTE: It is not possible to carry out the removal of a data item from a graph where the key panel is not available.

Collective Filtering

It is possible to add data items from several different graphs to a selected graph in order to further refine the results using the same method as in **Graph to Graph Filtering**. You can also add a data item that is a combination of previously filtered data items from various graphs.



Each time an additional data item is dropped onto the graph, the results are re-calculated based primarily on the original data points, and then on the order that the data items were subsequently added to the graph.

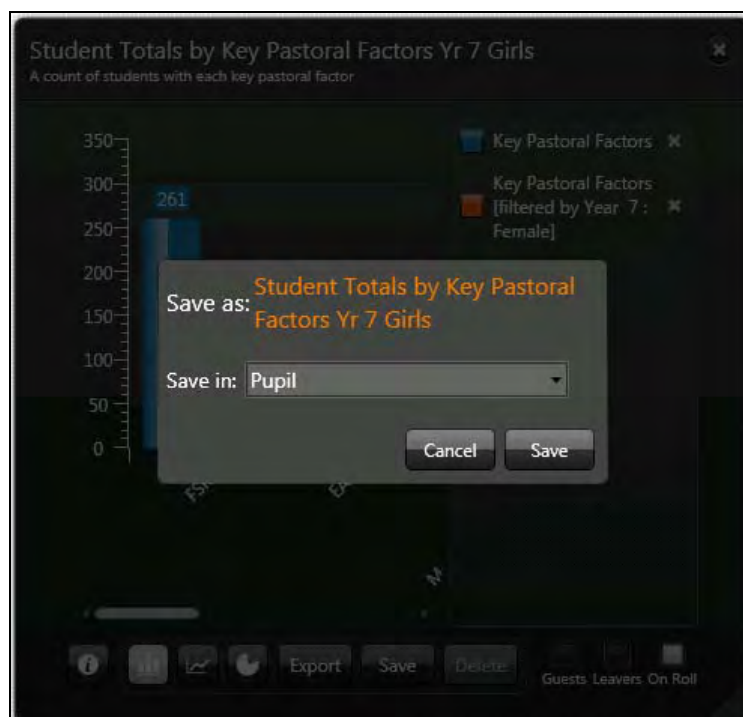
In the previous example, the key panel clearly indicates the calculation order of the data items together with the representative colour that is used to differentiate each data item on the graph.

Saving a Graph of Your Own Creation

As you combine data items from multiple graphs and create graphical outputs that are specifically required in your school, you can save these user defined graph definitions to any of the Catalogue buttons on the **Discover Application Bar**.



1. When you have created a graph definition that you want to keep for future use, click the **Save** button at the bottom of the selected graph dialog to display the **Save as** dialog.



A default name for the new graph is suggested but this can be changed, if required by overtyping the text.

2. Select the **Save in:** drop-down arrow and select the most appropriate **Catalogue** in which to save the graph, from the list.

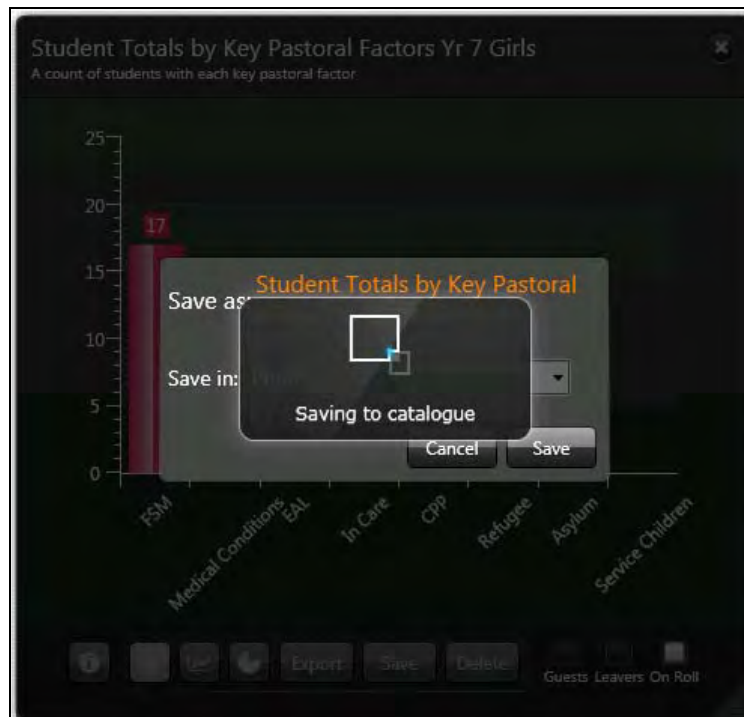
If you want to create your own collection of specific graphs, select the **Custom Graphs** catalogue from the list displayed.

Saving graphs to the **Custom Graphs** catalogue means that you can revisit graphs that you have previously defined without the need to create them again.



Custom Graphs button

- Click the **Save** button and an information caption advises you that this graph is **Saving to catalogue**.



This graph can now be found at the bottom of the list of available graph outputs from the selected catalogue button or the **Custom Graphs** button on the **Discover Application Bar**.

Deleting a Graph of Your Own Creation

If any of your user defined graphs have ceased to be relevant or the drop-down list of graphical outputs has become cluttered, user defined graphs can be deleted from the catalogue to which they were saved.

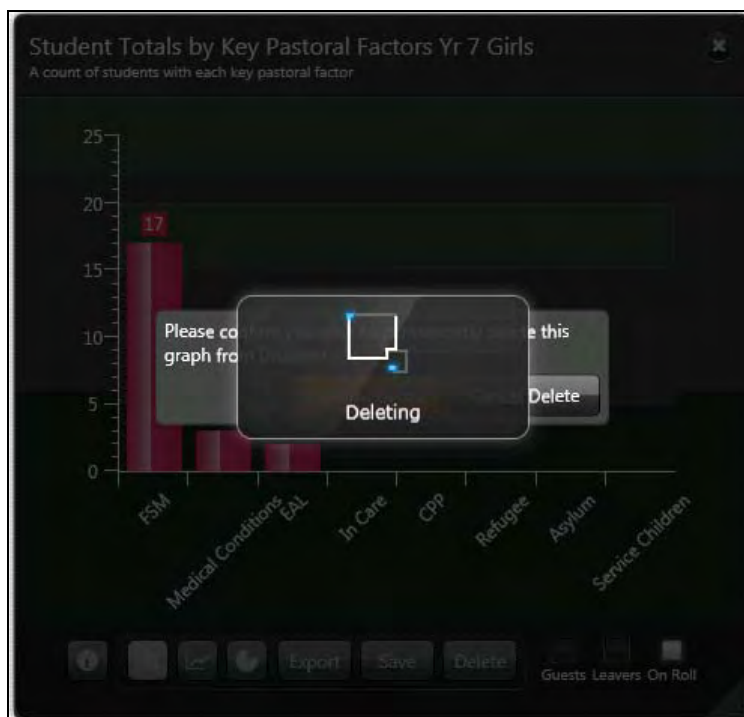
- Click the relevant **Catalogue** button on the **Discover Application Bar** to display the list of available graph outputs.



2. Select the relevant graph name and drag and drop it onto the Discover canvas.
3. Click the **Delete** button at the bottom of the dialog to display the following message:



4. Click the **Confirm Delete** button and an information caption advises you that Discover is **Deleting** this graph.



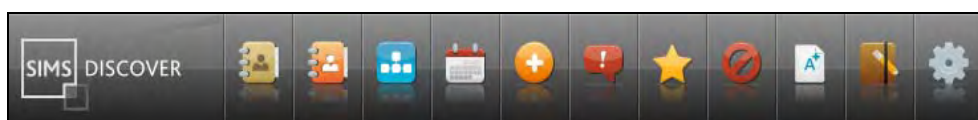
The graph definition is removed from Discover and the graph is no longer available from the drop-down list of available graph outputs from the selected **Catalogue** button on the **Discover Application Bar**.

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Introduction

The predefined graphs that have been provided are accessible from a series of category specific **Catalogue** buttons on the **Discover Application Bar**. These include options such as **Pupil**, **Students with Additional Needs**, **Behaviour** and **Achievement** records and **Attendance** statistics.

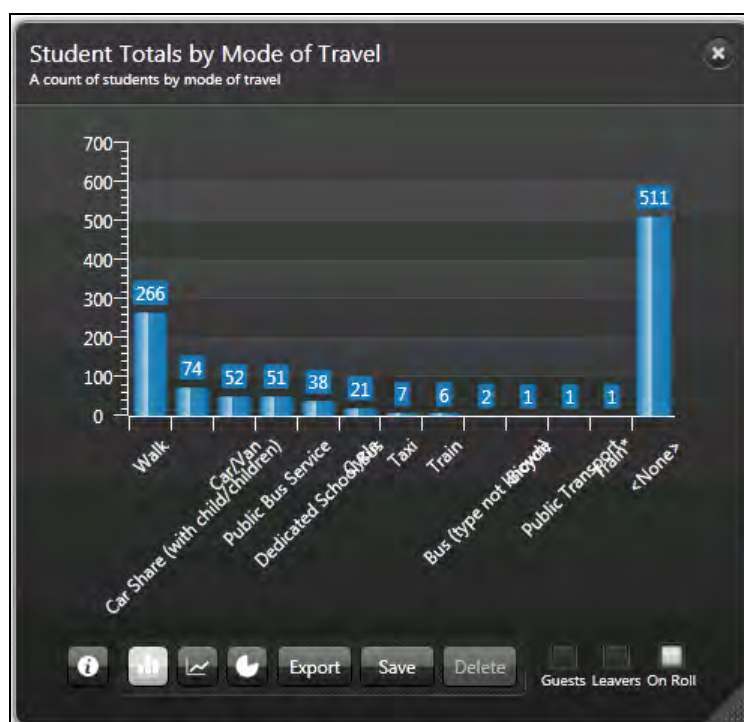


Graphical Outputs Available in Discover

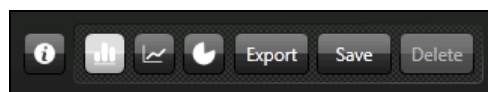
The majority of the predefined graphs initially open as bar graphs. However, it is possible to change the type of graphical display so that the data can be seen more clearly.

Whichever type of graphical display you select, the data points on the **y** axis are marked with a count of the number of pupil/students who fall into each criteria or data item on the **x** axis.

In the following example, 266 pupil/students have been recorded as having a **Mode of Travel** of **Walk** and 511 come to school by means of a **Car/Van**.



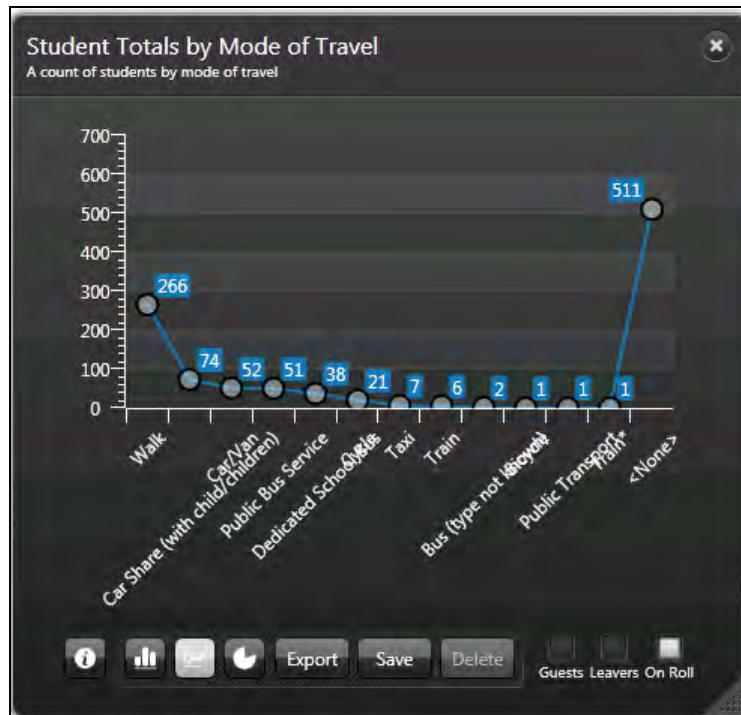
From the bottom of a graph, select the appropriate button to display the data in a different format from the default of bar graph.



Click the **Progression Line** button to display the data as a Progression Line graph.



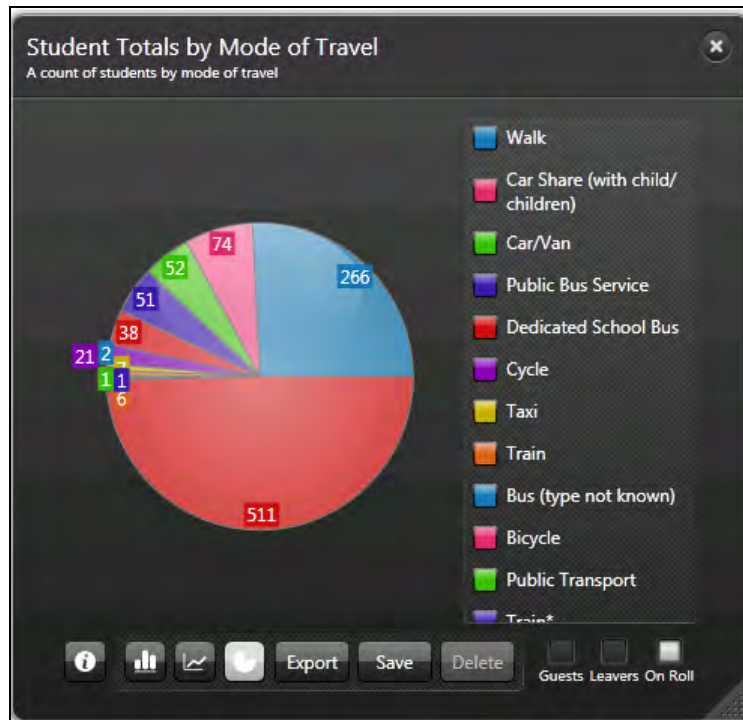
Progression Line button



Click the **Pie Chart** button to display the data as a Pie Chart.



Pie Chart button



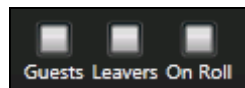
Click the **Bar Graph** button to return to the default graphical display.



Bar Graph button

Client Filters on the Front of Graphs

It is possible to change the filter of the data items displayed in the graph by selecting **Guests**, **Leavers** and **On Roll**.



Toggling the client filters updates the graphical display from the default filter.

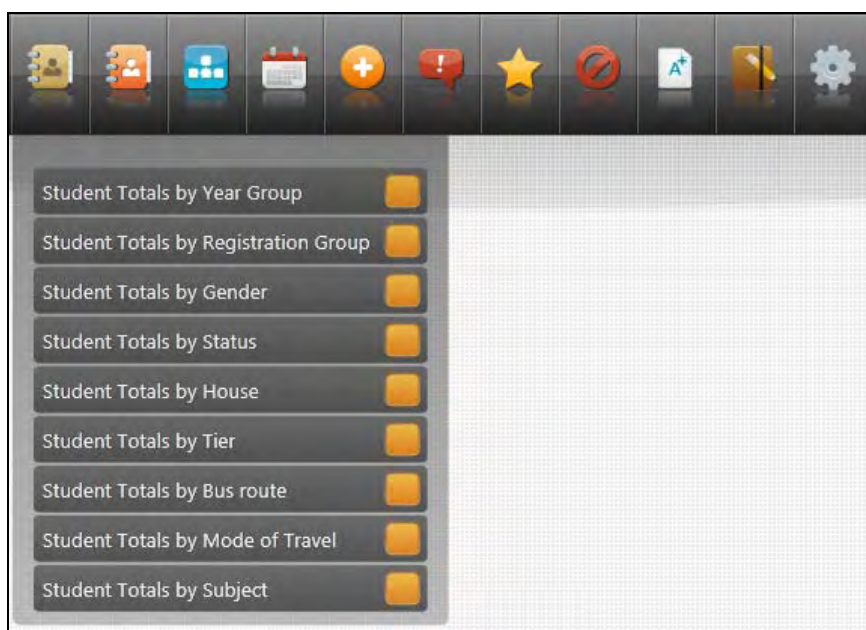
Pupil/Student Graphs

Click the **Pupil** button to display the drop-down list of available graph outputs.



Pupil button

All graphical outputs are based on the pupil/student population who are on-roll as of today.



- **Student Totals by Year Group** – the default graphical display is a bar graph of on-roll pupil/students.
- **Student Totals by Registration Group** – the default graphical display is a bar graph of on-roll pupil/students.
- **Student Totals by Gender** - the default graphical display is a multi-series bar graph of on-roll pupil/students. It is not possible to create a pie chart from the results of this graph. However, it is possible to create pop-ups from any of the data points on both the front and the reverse of the bar or progression lines graph.
- **Student Totals by Status** - the default graphical display is a bar graph of on-roll pupil/students. Filters of **Leavers** and **Guest** can be applied.
- **Student Totals by House** - the default graphical display is a bar graph of on-roll pupil/students.
- **Student Totals by Tier** - the default graphical display is a bar graph of on-roll pupil/students.

- **Student Totals by Bus Route** - the default graphical display is a bar graph of on-roll pupil/students.
- **Student Totals by Mode of Travel** - the default graphical display is a bar graph of on-roll pupil/students.
- **Student Totals by Subject** - the default graphical display is a bar graph of on-roll pupil/students.

PreAdmission Students

Click the **PreAdmission** button to display the drop-down list of available graph outputs.



PreAdmission button

All graphical outputs are based on the pupil/student population who are current applicants as of today.

Please refer to *Using the Discover SIMS Configuration Utility to Create Assessment Graphs* on page 61 for more detailed information regarding the setting up of Post Code analysis search depths.



- **Number of Applications by Intake Group** – the default graphical display is a bar graph of applicants. All intake groups for the current academic year are displayed.
- **Number of Applications by Application Status Category** – the default graphical display is a bar graph of applicants. All possible statuses are displayed even if they have a null value.
- **Number of Applications by Feeder School** – the default graphical display is a bar graph of applicants.

- **Number of Visits by Intake Group** – the default graphical display is a bar graph of applicants. Results are displayed for visits in the past or scheduled for a future date within the current academic year. If an applicant has made multiple visits for various intakes, each visit is counted within the total for each intake group.
- **Number of Enquiries by Country** – the default graphical display is a bar graph of all enquiries received. This graph is only available for Independent schools.
- **Number of UK Enquiries by Post Code (Academic YTD)** – the default graphical display is a bar graph of all enquiries received. This graph is only available for Independent schools. Only enquiries from a United Kingdom post code can be displayed.

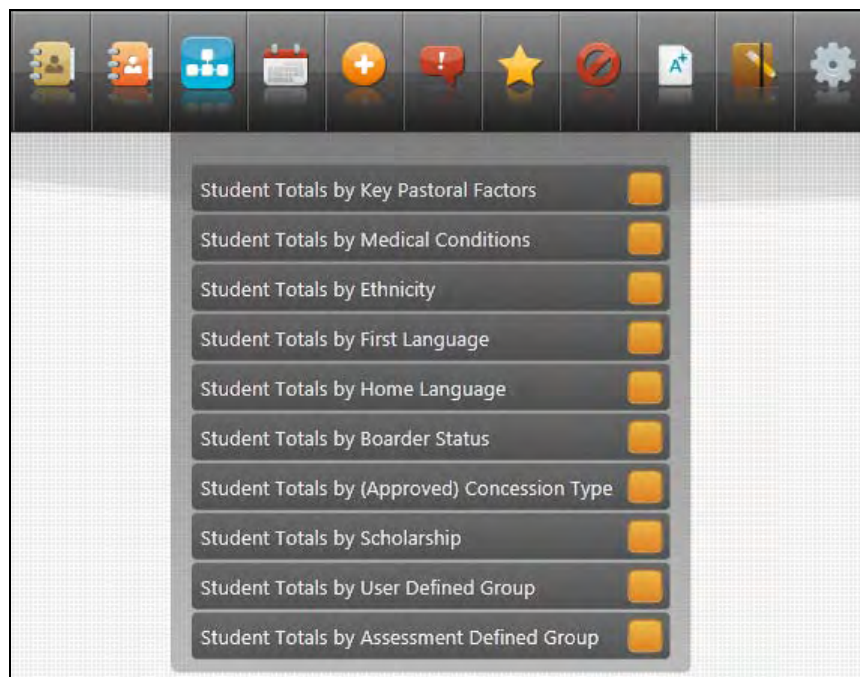
Pastoral Graphs

Click the **Pastoral** button to display a drop-down list of available graph outputs.



Pastoral button

All graphical outputs are based on the pupil/student population who are on-roll as of today.



- **Student Totals by Key Pastoral Factors** – the default graphical display is a bar graph of on-roll pupil/students. EAL is displayed as Newcomer in NI. Only pupil/students with any of the key pastoral factors are displayed, pupil/students who have none of the factors are excluded.
- **Student Totals by Medical Conditions** – the default graphical display is a bar graph of on-roll pupil/students.
- **Student Totals by Ethnicity** – the default graphical display is a bar graph of on-roll pupil/students. Only data points with a positive value are displayed.
- **Student Totals by First Language** – the default graphical display is a bar graph of on-roll pupil/students. Only data points with a positive value are displayed.
- **Student Totals by Home Language** – the default graphical display is a bar graph of on-roll pupil/students. Only data points with a positive value are displayed.
- **Student Totals by Boarder Status** – the default graphical display is a bar graph of on-roll pupil/students. This graph is only available for Independent schools.
- **Student Totals by (Approved) Concession Type** – the default graphical display is a bar graph of on-roll pupil/students. This graph is only available for Independent schools.
- **Student Totals by Scholarship** – this graph is only available for Independent schools.
- **Student Totals by User Defined Group** – the default graphical display is a bar graph of on-roll pupil/students. Groups identified for inclusion in Discover via **Focus | Groups | User Defined Groups** in SIMS. Profiles groups cannot be included in Discover.
- **Student Totals by Assessment Defined Group** – groups identified for inclusion in Discover via **Focus | Groups | Assessment Defined Groups** in SIMS. Profiles groups cannot be included in Discover.

Attendance Graphs

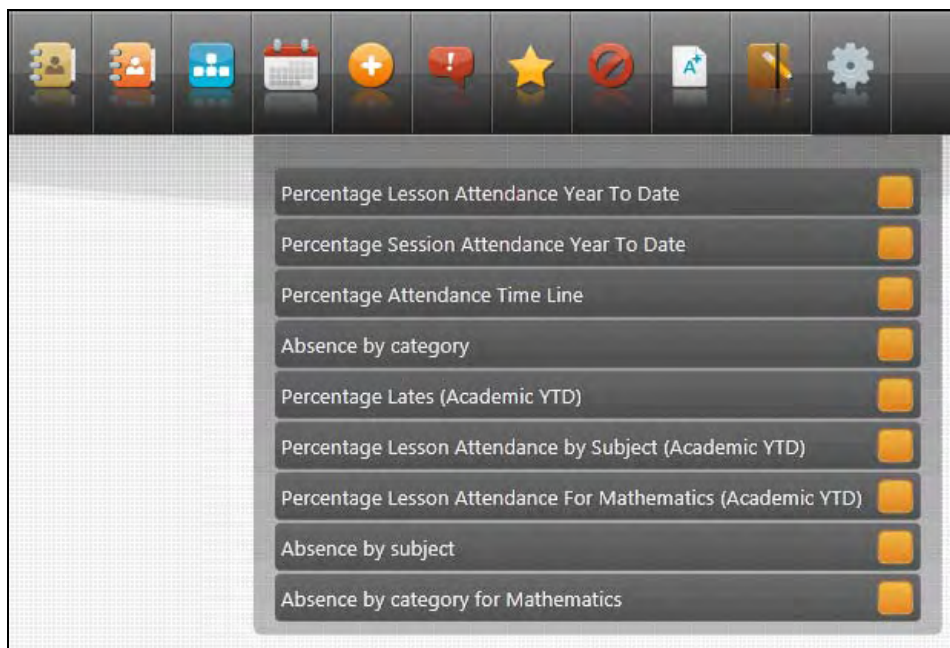
Click the **Attendance** button to display a drop-down list of available graph outputs.



Attendance button

All graphical outputs are based on the pupil/student population who are on-roll as of today.

Please refer to *Using the Discover SIMS Configuration Utility to Create Assessment Graphs* on page 61 for more detailed information regarding the setting up of Attendance Intervals.



- **Percentage Lesson Attendance Year to Date** - the default graphical display is a bar graph of on-roll pupil/students. This graph is only available for Secondary schools using Lesson Monitor.
- **Percentage Session Attendance Year to Date** - the default graphical display is a bar graph of on-roll pupil/students.
- **Percentage Attendance Time Line** - the default graphical display is a bar graph of on-roll pupil/students. Percentage session attendance is calculated by adding together the number of Present Marks and the number of Approved Educational Absences and dividing this figure by the number of Possible Marks.
- **Absence by Category** - the default graphical display is a bar graph of on-roll pupil/students.
- **Percentage Lates (Academic YTD)** - the default graphical display is a bar graph of on-roll pupil/students. This graph is based on any L or U marks (Late before/after register closes).
- **Percentage Lesson Attendance by Subject (Academic YTD)** - the default graphical display is a bar graph of on-roll pupil/students. This graph is only available for Secondary schools using Lesson Monitor.
- **Percentage Lesson Attendance for Mathematics (Academic YTD)** - the default graphical display is a bar graph of on-roll pupil/students. This graph is only available for Secondary schools using Lesson Monitor.

- **Absence by Subject** - the default graphical display is a bar graph of on-roll pupil/students. This graph is only available for Secondary schools using Lesson Monitor.
- **Absence by Category for Mathematics** - the default graphical display is a bar graph of on-roll pupil/students. This graph is only available for Secondary schools using Lesson Monitor.

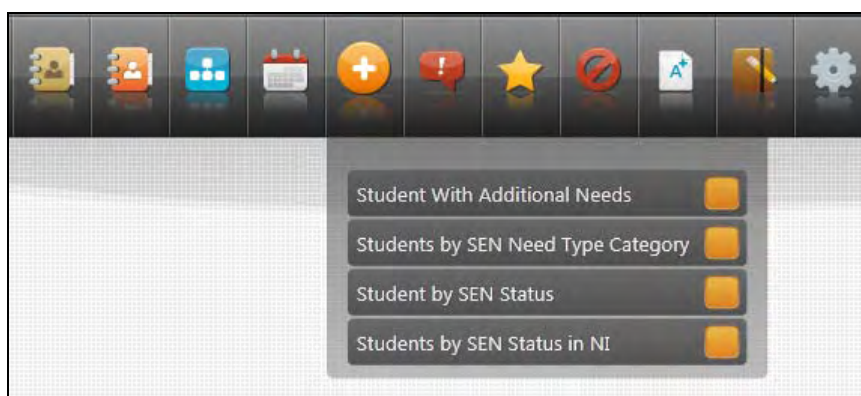
SEN Graphs

Click the **SEN** button to display the drop-down list of available graph outputs.



SEN button

All graphical outputs are based on the pupil/student population who are on-roll as of today.



- **Student with Additional Needs** - the default graphical display is a bar graph of on-roll pupil/students.
- **Students by SEN Need Type Category** - the default graphical display is a bar graph of on-roll pupil/students. Pupil/students can have multiple SEN Need Types assigned so these are displayed in ranked order. A pupil/student with multiple need types assigned will appear in each data point that is applicable to them.
- **Student by SEN Status** - the default graphical display is a bar graph of on-roll pupil/students. Pupil/students with a null SEN Status are not displayed in the graph.
- **Students by SEN Status in NI** - the default graphical display is a bar graph of on-roll pupil/students.

Behaviour Graphs

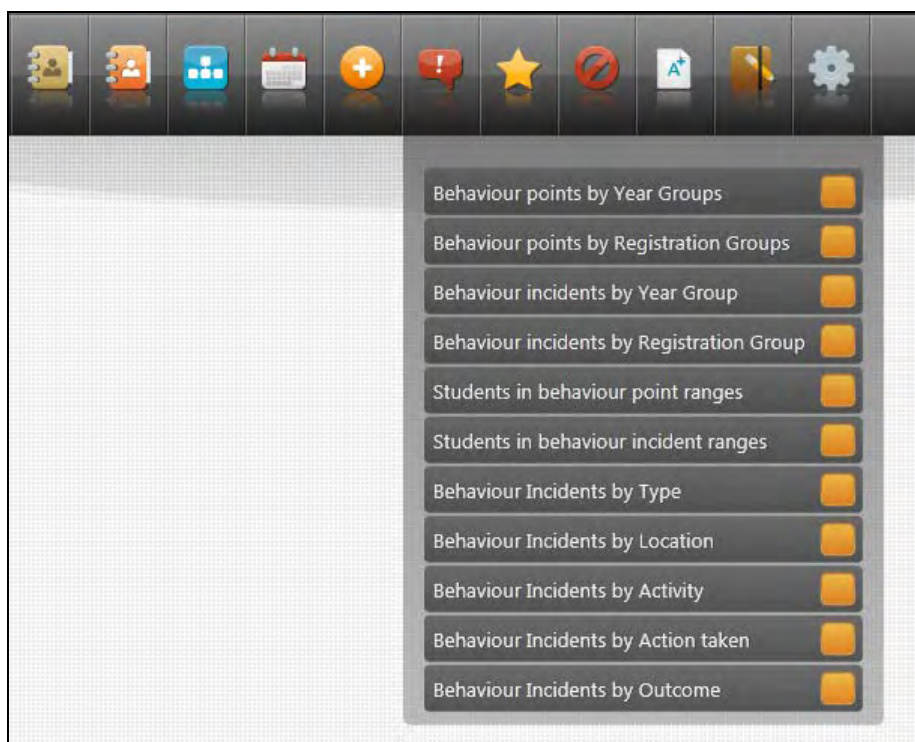
Click the **Behaviour** button to display a drop-down list of available graph outputs.



Behaviour button

All graphical outputs are based on the pupil/student population who have been on-roll in the current academic year and as such, Leavers are included.

Please refer to *Using the Discover SIMS Configuration Utility to Create Assessment Graphs* on page 61 for more detailed information regarding the setting up of Behaviour Intervals.



- **Behaviour Points by Year Groups** - the default graphical display is a bar graph of on-roll pupil/students.
- **Behaviour Points by Registration Groups** - the default graphical display is a bar graph of on-roll pupil/students.
- **Behaviour Incidents by Year Group** - the default graphical display is a bar graph of on-roll pupil/students.
- **Behaviour Incidents by Registration Group** - the default graphical display is a bar graph of on-roll pupil/students.

- **Students in Behaviour Point Ranges** - the default graphical display is a bar graph of on-roll pupil/students.
- **Students in Behaviour Incident Ranges** - the default graphical display is a bar graph of on-roll pupil/students.
- **Behaviour Incidents by Type** - the default graphical display is a bar graph of on-roll pupil/students. A pupil/student with multiple incidents will appear in each data point that is applicable to them.
- **Behaviour Incidents by Location** - the default graphical display is a bar graph of on-roll pupil/students. A pupil/student with multiple incidents will appear in each data point that is applicable to them.
- **Behaviour Incidents by Activity** - the default graphical display is a bar graph of on-roll pupil/students. A pupil/student with multiple incidents will appear in each data point that is applicable to them.
- **Behaviour Incidents by Action Taken** - the default graphical display is a bar graph of on-roll pupil/students. A pupil/student with multiple incidents will appear in each data point that is applicable to them.
- **Behaviour Incidents by Outcome** - the default graphical display is a bar graph of on-roll pupil/students. A pupil/student with multiple incidents will appear in each data point that is applicable to them.

Achievement Graphs

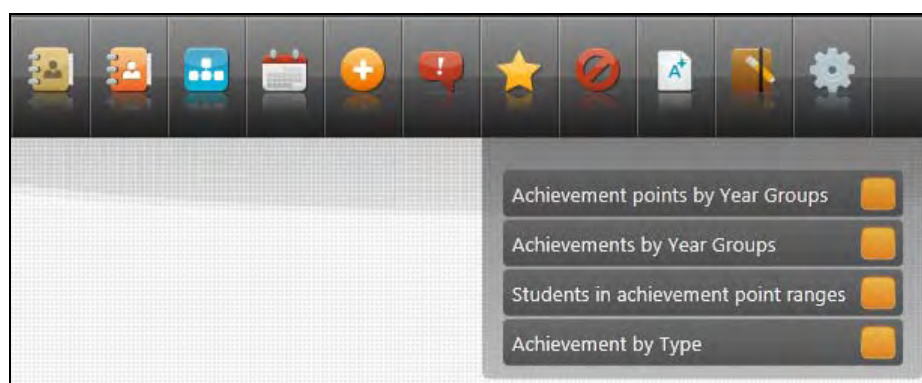
Click the **Achievement** button to display a drop-down list of available graph outputs.



Achievement button

All graphical outputs are based on the pupil/student population who are on-roll as of today.

Please refer to *Using the Discover SIMS Configuration Utility to Create Assessment Graphs* on page 61 for more detailed information regarding the setting up of Achievement Intervals.



- **Achievement Points by Year Groups** - the default graphical display is a bar graph of on-roll pupil/students.
- **Achievements by Year Groups** - drill down into data points is enabled, the default graphical display is a bar graph of on-roll pupil/students.
- **Students in Achievement Point Ranges** - drill down into data points is enabled, the default graphical display is a bar graph of on-roll pupil/students.
- **Achievement by Type** - the default graphical display is a bar graph of on-roll pupil/students.

Exclusions Graphs

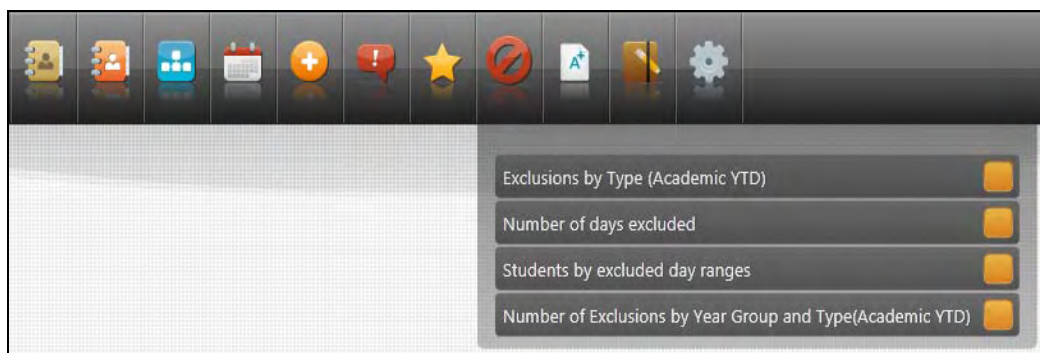
Click the **Exclusions** button to display a drop-down list of available graph outputs.



Exclusions button

All graphical outputs are based on the pupil/student population who have been on-roll in the current academic year and as such, Leavers are included.

Please refer to *Using the Discover SIMS Configuration Utility to Create Assessment Graphs* on page 61 for more detailed information regarding the setting up of Exclusions Intervals.



- **Exclusions by Type (Academic YTD)** - the default graphical display is a bar graph of on-roll pupil/students.
- **Number of Days Excluded** - the default graphical display is a bar graph of on-roll pupil/students.
- **Students by Excluded Day Ranges** - the default graphical display is a bar graph of on-roll pupil/students.

- **Number of Exclusions by Year Group and Type (Academic YTD)** – the default graphical display is a multi-series bar graph of on-roll pupil/students. It is not possible to create a pie chart from the results of this graph. However, it is possible to create pop-ups from any of the data points on both the front and the reverse of the bar or progression lines graph.

Assessment Graphs

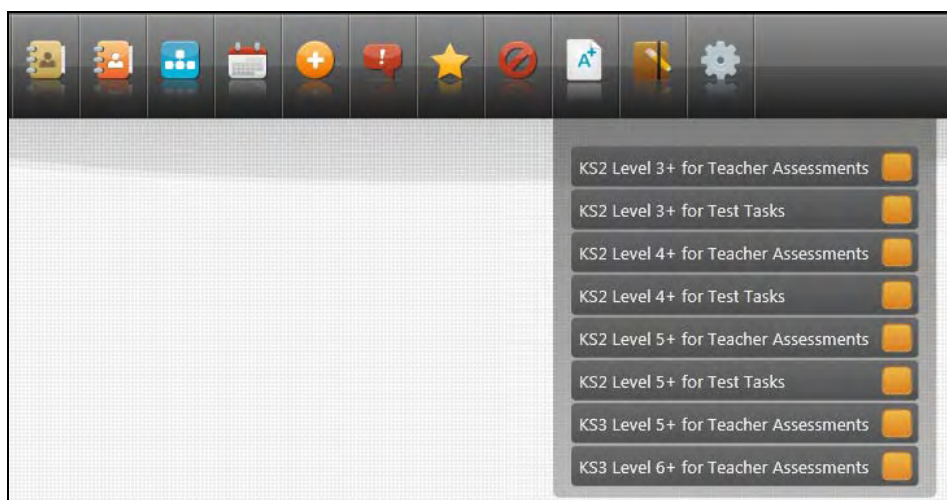
Click the **Assessment** button to display a drop-down list of available graph outputs.



Assessment button

All graphical outputs are based on the pupil/student population who are on-roll as of today.

Please refer to *Using the Discover SIMS Configuration Utility to Create Assessment Graphs* on page 61 for detailed information relating to the setting up and creation of your own specific Assessment Graphs.



For English Primary Schools

10 pre-defined Assessment graphs have been provided:

- **KS1 Level 2+ for Teacher Assessments** – Boolean Bar output
- **KS1 Level 3+ for Teacher Assessments** – Boolean Bar output
- **KS1 Level 2+ for Test Tasks** – Boolean Bar output
- **KS1 Level 3+ for Test Tasks** – Boolean Bar output
- **KS2 Level 3+ for Teacher Assessments** - Boolean Venn output

- **KS2 Level 3+ for Test Tasks** - Boolean Venn output
- **KS2 Level 4+ For Teacher Assessments** - Boolean Venn output
- **KS2 Level 4+ for Test Tasks** – Boolean Venn output
- **KS2 Level 5+ for Teacher Assessments** – Boolean Venn output
- **KS2 Level 5+ for Test Tasks** – Boolean Venn output.

For English Secondary Schools

Two pre-defined Assessment graphs have been provided:

- **KS3 Level 5+ for Teacher Assessments** – Boolean Bar output
- **KS3 Level 6+ for Teacher Assessments** – Boolean Bar output.



IMPORTANT NOTE: If you have previously imported CTF files or the Key Stage 1 and 2 Wizards and Aspects from AMPARK, into SIMS, the pre-defined graphs for Primary schools will also be available for selection in secondary schools.

For Welsh Primary Schools

Two pre-defined Assessment graphs have been provided:

- **KS1 Level 2+ for Teacher Assessments** – Boolean Bar output
- **KS2 Level 3+ for Teacher Assessments** - Boolean Venn output.

For Welsh Secondary Schools

One pre-defined Assessment graph has been provided:

- **KS3 Level 5+ for Teacher Assessments** – Boolean Bar output.



IMPORTANT NOTE: If you have previously imported CTF files or the Key Stage 1 and 2 Welsh Wizards and Aspects from AMPARK, into SIMS, the pre-defined graphs for Primary schools will also be available for selection in secondary schools.

04 | Setting up SIMS to Enable the Creation of Assessment Graphs

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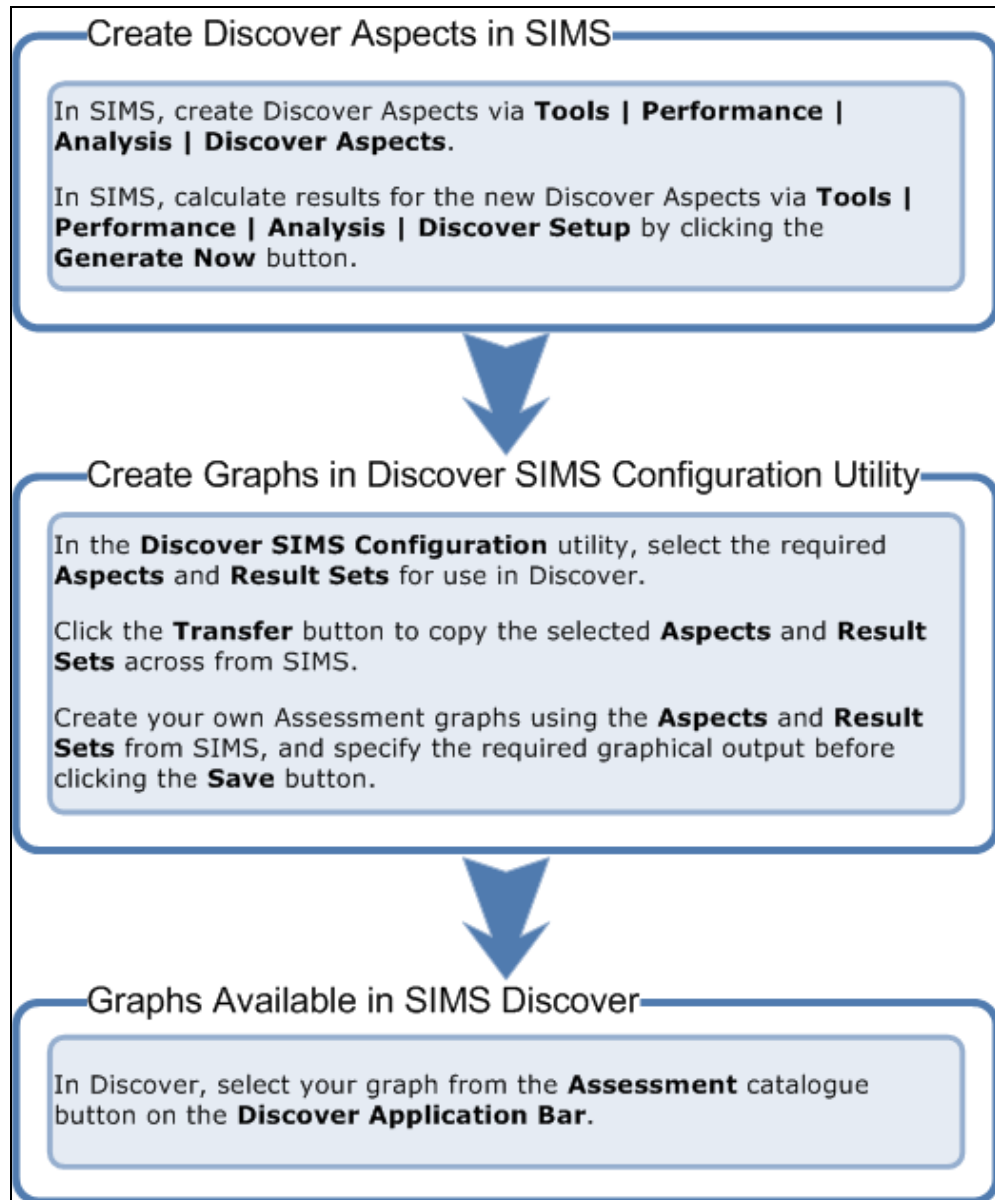
Introduction

The process of setting up and configuring Assessment graphs for use in Discover begins in SIMS with the creation of Discover Aspects. Once Discover Aspects have been created and the results for these aspects have been generated in SIMS, the Discover Aspects must be transferred from SIMS into Discover.

It is possible to create your own graphs in Discover so that you can run analysis for targets, reviews and forecasts across each Key Stage, and to incorporate your school's own Discover Aspects as well as the statutory aspects. You can also create new Discover Aspect definitions that are composed of existing aspects from SIMS Assessment.

The actual creation of specific graphs is undertaken in the **Discover SIMS Configuration** utility. Once graphs have been created, the data is transferred into Discover so that the compiled graphs can subsequently be viewed in Discover.

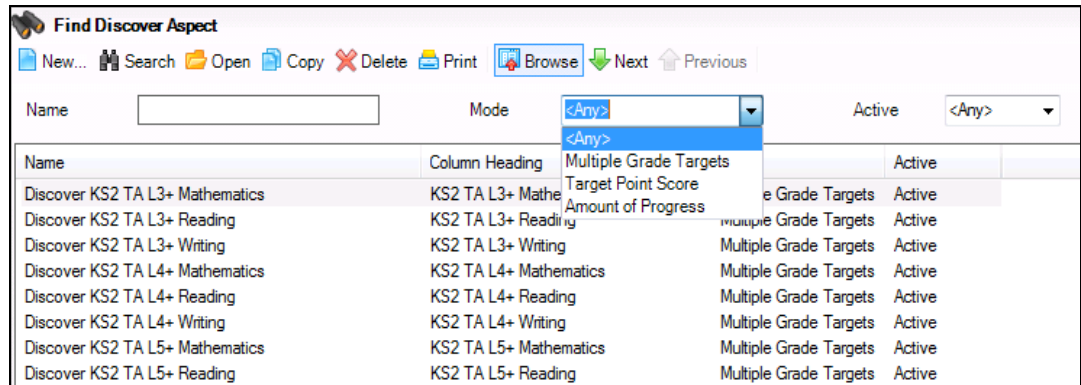
The Process of Creating Discover Aspects in SIMS and Copying them into Discover



Searching for an Existing Discover Aspect

The pre-defined Assessment graphs that have been provided in Discover have been created using a number of aspects. These aspects can be located in the **Find Discover Aspect** browser in SIMS and can be identified by the word 'Discover' at the beginning of their name.

1. In SIMS, select **Tools | Performance | Analysis | Discover Aspects** to display the **Find Discover Aspect** browser.



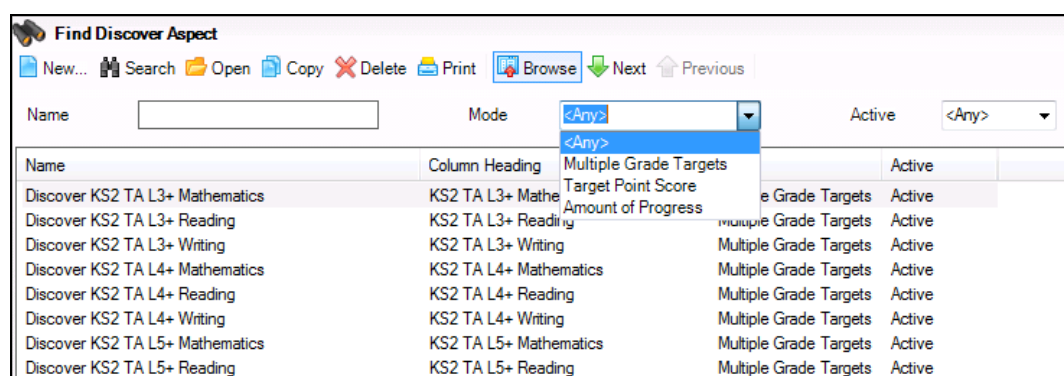
2. Enter the **Name** or a partial name of the Discover Aspect that you are searching for.
3. Alternatively, select the appropriate mode of the aspect from the **Mode** drop-down list:
 - Multiple Grade Targets
 - Target Point Score
 - Amount of Progress.
4. Select the **Active** status from the drop-down list before clicking the **Search** button to display a list of all the aspects that match the search criteria entered.
5. Highlight the required aspect and click the **Open** button on the browser to display the **Discover Aspect Detail** page.

You can view the components of the 'Discover' aspect but it is not possible to change any of these for an aspect that has been provided for use with the pre-defined Assessment graphs.

Creating a New Discover Aspect

If you want to create other aspects for use in the creation of your own specific Assessment graphs in Discover, this can now be done. You may want to create only one or two aspects at a time or several in one go. Whichever approach you choose to adopt when creating your own aspects, it is essential that the **Generate Now** button is clicked in the **Discover Setup Details** page every time new aspects are created in SIMS if you want these aspects to be available for use in Discover immediately. Please see *Generating the Discover Aspect Results* on page 59 for further information.

1. Select **Tools | Performance | Analysis | Discover Aspects** to display the **Find Discover Aspect** browser.



2. After searching for the aspect to see if it already exists, click the **New** button and select the relevant mode for the new Discover Aspect:
 - **Multiple Grade Targets.** Please refer to *Creating a Multiple Grade Targets Discover Aspect* on page 46 for detailed information.
 - **Target Point Score.** Please refer to *Creating a Target Point Score Discover Aspect* on page 52 for detailed information.
 - **Amount of Progress.** Please refer to *Creating an Amount of Progress Discover Aspect* on page 56 for detailed information.

It is possible to create three different modes of Discover aspect, each with specific **Value Definitions**, **Range Definitions**, **Result Sets** and **Amount of Progress** parameters.

The **Discover Aspect Detail** page displays different fields for completion, depending on the mode selected. However, the **Basic Details** panel remains the same for all modes of aspect.

The screenshot shows the 'Discover Aspect Detail' window. At the top, there are 'Save', 'Undo', and 'Print' buttons. Below them are tabs for '1 Basic Details', '2 Range Definitions', and '3 Result Set(s)'. The '1 Basic Details' tab is active. It contains the following fields:

- Name:** A text input field.
- Column Heading:** A text input field.
- Description:** A large text area with a vertical scrollbar.
- External ID:** A text input field.
- Mode:** A dropdown menu currently showing 'Target Point Score'.
- Active:** A checked checkbox.

3. Enter a unique **Name** for the new Discover aspect in the **Basic Details** panel.
4. Enter a unique **Column Heading** and a clear and concise **Description** to differentiate this Discover aspect from existing aspects.

The **External ID** field is created when the aspect is saved.

The **Mode** field is populated automatically according to the mode selected when clicking the **New** button to add a new aspect.

The **Active** check box is selected by default.

Creating a Multiple Grade Targets Discover Aspect

When creating a new Discover aspect with the mode of **Multiple Grade Targets**, the **Discover Aspect Detail** page contains two additional panels for completion, **Grade Value Definitions** and **Result Set(s)**.

In the **Grade Value Definitions** panel, the **Equivalence Minimum** field is set to 1.0 by default. This value can be changed, if required. The valid range is 1.0 to 100.0.

The **Equivalence Maximum** field is set to 100.0 by default. This value can be changed, if required but the maximum cannot be greater than 100.0.

The screenshot displays the 'Discover Aspect Detail' page. The top section is titled '2 Grade Value Definitions' and contains two input fields: 'Equivalence Minimum' with a value of '1.0' and 'Equivalence Maximum' with a value of '100.0'. Below these fields is a table with four columns: 'Grade Set', 'Equiv.', 'Source Aspect(s)', and 'Grade(s)'. To the right of the table are three buttons: 'New' (with a plus icon), 'Open' (with a folder icon), and 'Delete' (with an X icon). The bottom section is titled '3 Result Set(s)' and contains a table with one column labeled 'Name'. To the right of the table are two buttons: 'Add' (with a plus icon) and 'Remove' (with a minus icon).

1. Click the **New** button adjacent to the **Grade Set** panel to display the **Add/Edit Discover Grade Value Definition** dialog.

Add/Edit Discover Grade Value Definition

Basic Details

Grade Set: *Progress + = -

Equivalence: 1.0

Source Aspect(s)

Name	Column Heading	Owner
*English Progress Since Last Term	*English Progress Si...	

Grade(s)

Grade	Description
+	Is above target at this stage
=	Is on target at this stage
-	Is below target at this stage

OK Cancel

2 matches found

2. In the **Basic Details** panel, click the **Browser** button adjacent to the **Grade Set** field to display the **Find Grade Set Browser** dialog.

Find Grade Set

Search Print

Grade Set Name: Module: Assessment Manager Supplier:

Name	Module	Supplier
*Progress + = -	Assessment Manager	820 4321 Green Abbey School
AIDA	Assessment Manager	820 4321 Green Abbey School
Art Music PE 2000	Assessment Manager	CES Assessment Services
Art Music pre 2000	Assessment Manager	CES Assessment Services
BTec 1st Certificate	Assessment Manager	820 4321 Green Abbey School
BTec 1st Certificate Target	Assessment Manager	820 4321 Green Abbey School
CIDA	Assessment Manager	820 4321 Green Abbey School
CZ Teacher Assessments	Assessment Manager	CES Assessment Services
DIDA	Assessment Manager	820 4321 Green Abbey School
Effort / Homework / Behaviour Grades	Assessment Manager	820 4321 Green Abbey School
EMA B	Assessment Manager	CES Assessment Services
FFT Grade Set	Assessment Manager	CES Assessment Services

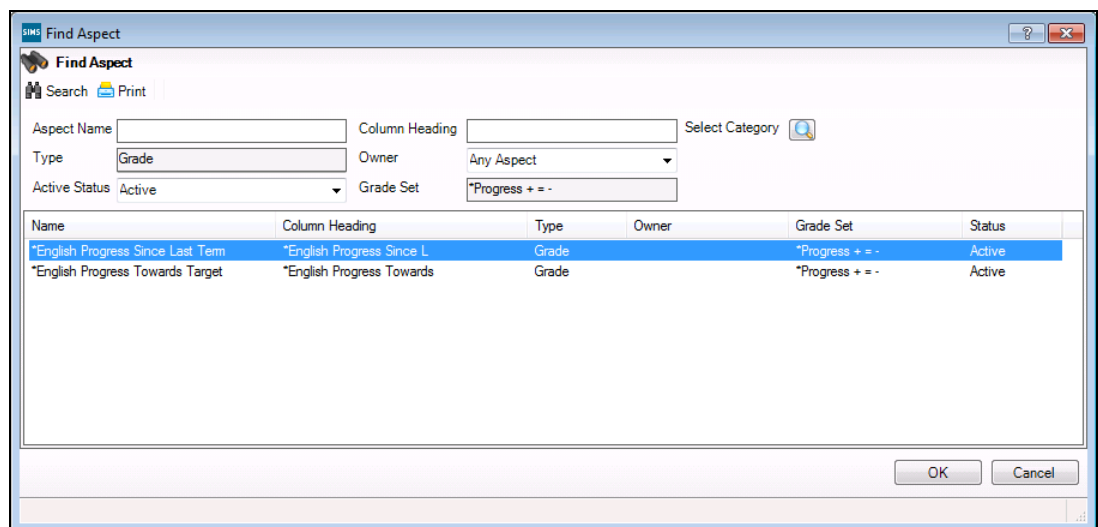
OK Cancel

3. Enter the **Grade Set Name**, if known or select the **Module** from the drop-down list.

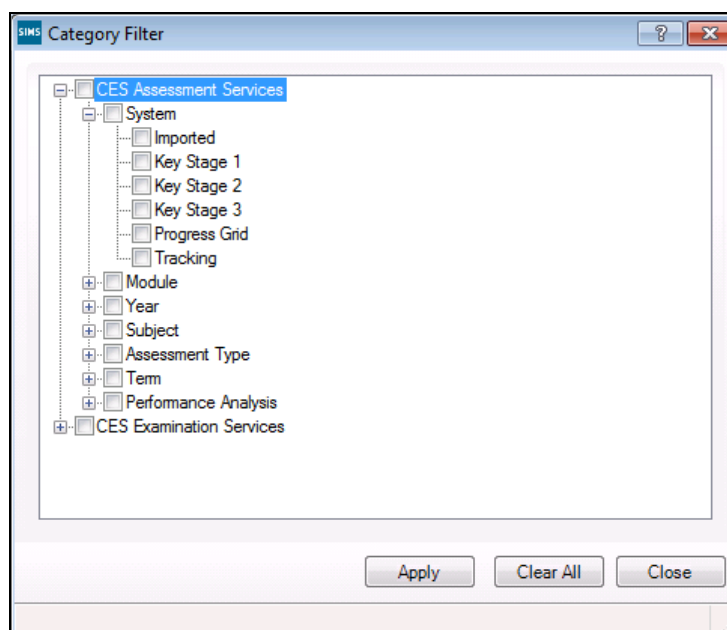
The **Module** field filters the grade sets on the name of the SIMS module that was originally used to create the grade set, e.g. Examinations Organiser, Assessment Manager, etc.

The **Supplier** field displays the establishment that created the grade set, e.g. your LA or someone in your own school.

4. Click the **Search** button to display a list of grade sets that match the search criteria entered.
5. Highlight the required **Name** and click the **OK** button to return to the **Add/Edit Discover Grade Value Definition** dialog.
6. In the **Source Aspect(s)** panel, click the **Add** button to display the **Find Aspect** dialog.



7. Enter the **Aspect Name**, the **Column Heading** or click the **Select Category** browser button to display the **Category Filter** dialog.



8. Use the + and – symbols to expand and contract the tree structure and select the check box of any filters to be applied.
9. Click the **Apply** button to return to the **Find Aspect** browser.



NOTE: Delete the default entry in the **Grade Set** field in the **Find Aspect** dialog to view all available aspects before searching.

10. Click the **Search** button to display a list of aspects that match the search criteria.
11. Select the required **Aspect** and click the **OK** button to populate the **Source Aspect(s)** panel. Continue adding source aspects until you have selected all those required.

Add/Edit Discover Grade Value Definition

Basic Details

Grade Set: Teacher Assessments KS3

Equivalence: 1.0

Source Aspect(s)

Name	Column Heading	Owner
EN AT1: Speaking and Listening KS3	EN AT1 Speak and ...	
EN AT2: Reading KS3	EN AT2 Reading KS3	
EN AT3: Writing KS3	EN AT3 Writing KS3	

Grade(s)

Grade	Description
☒ E	Exceptional Performance
☒ 8	Level 8
☒ 7	Level 7
☒ 6	Level 6
☒ 5	Level 5
☐ 4	Level 4

OK Cancel

24 matches found

The **Grade(s)** panel is populated as the source aspects are selected.

12. Select the appropriate **Grade(s)** by clicking in the check box adjacent to each grade.

13. Click the **OK** button on the **Add/Edit Discover Grade Value Definition** dialog to return to the **Discover Aspect Detail** page.

Discover Aspect Detail: Key Stage 3 Teacher Assessments

Save Undo Print

1 Basic Details 2 Grade Value Definitions 3 Result Set(s)

1 Basic Details

Name: Key Stage 3 Teacher Assessments

Column Heading: Key Stage 3 Teacher Asses

Description:

External ID: 3112

Mode: Multiple Grade Targets

Active: ☒

2 Grade Value Definitions

Equivalence Minimum: 1.0 Equivalence Maximum: 100.0

Grade Set	Equiv.	Source Aspect(s)	Grade(s)
Teacher Assessments KS3	1.0	- EN AT1: Speaking and Listening KS3 - EN AT2: Reading KS3 - EN AT3: Writing KS3	E, 8, 7, 6, M

New Open Delete

3 Result Set(s)

Name
Key Stage 3 Validated Result

+ Add - Remove

14. In the **Result Set(s)** panel, click the **Add** button to display the **Find Result Set** dialog.

Name	Module	Supplier	Status	Locked	Lock Date	Locked By
Key Stage 1 Validated Result	Assessment Manager	SIMS	Active	No		
Key Stage 2 Validated Result	Assessment Manager	SIMS	Active	No		
Key Stage 3 Validated Result	Assessment Manager	SIMS	Active	No		
KS4 Target	Assessment Manager	820 4321 Green Abbey School	Active	No		
Mock Exams	Assessment Manager	820 4321 Green Abbey School	Active	No		
QCDA Optional Tests Y07	Assessment Manager	CES Assessment Services	Active	No		
QCDA Optional Tests Y08	Assessment Manager	CES Assessment Services	Active	No		
QCDA Optional Tests Y09	Assessment Manager	CES Assessment Services	Active	No		
Year 1	Assessment Manager	678 0000 Torfaen LEA	Active	No		
Year 1 Autumn	Assessment Manager	678 0000 Torfaen LEA	Active	No		
Year 1 Spring	Assessment Manager	678 0000 Torfaen LEA	Active	No		
Year 1 Summer	Assessment Manager	678 0000 Torfaen LEA	Active	No		

15. Enter the **Result Set Name**, if known or select the **Module** from the drop-down list.

The **Module** field filters the result sets on the name of the SIMS module that was originally used to create the result set, e.g. Examinations Organiser, Assessment Manager, etc.

The **Supplier** field displays the establishment that created the result set, e.g. your LA or someone in your own school.

16. Select the **Active Status** or **LockStatus** from the respective drop-down lists. Locking a result set prevents the entry or editing of results in any column associated with that result set. The **Lock Date** and **Locked By** details are displayed if the result set has previously been locked.
17. Click the **Search** button to display a list of result sets that match the search criteria entered.
18. Highlight the required **Name** and click the **OK** button to return to the **Discover Aspect Detail** page.
19. Click the **Save** button on the **Discover Aspect Detail** page to save the newly created Discover aspect.

Creating a Target Point Score Discover Aspect

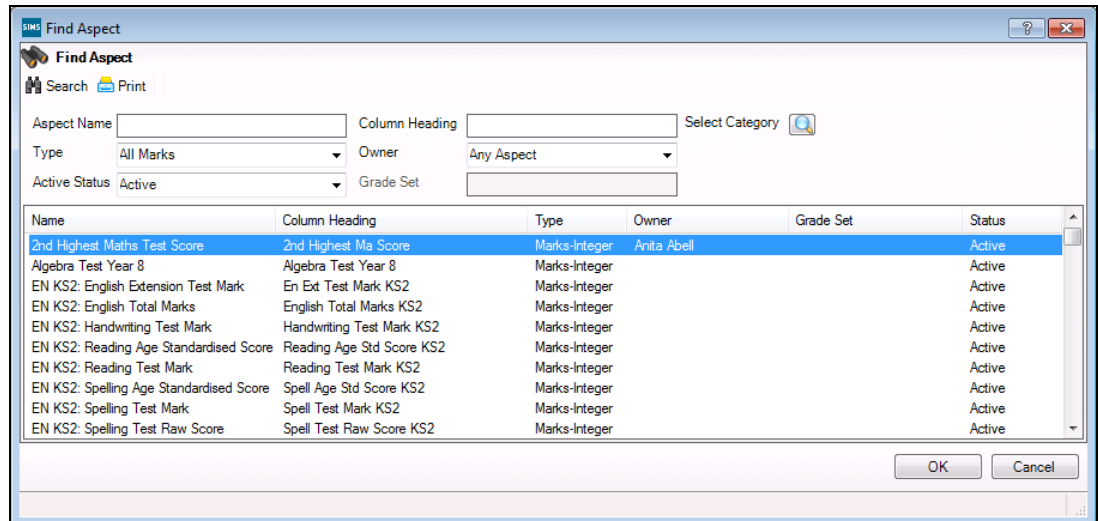
When creating a new Discover aspect with the mode of Target Point Score, the **Discover Aspect Detail** page contains two additional panels for completion, **Range Definitions** and **Result Set(s)**.

The screenshot shows the 'Discover Aspect Detail' page with two main panels. The top panel, titled '2 Range Definitions', contains a table with three columns: 'Source Aspect', 'Column Heading', and 'Range'. To the right of the table are three buttons: 'New' (with a plus icon), 'Open' (with a folder icon), and 'Delete' (with an X icon). The bottom panel, titled '3 Result Set(s)', contains a table with one column: 'Name'. To the right of the table are two buttons: 'Add' (with a plus icon) and 'Remove' (with a minus icon).

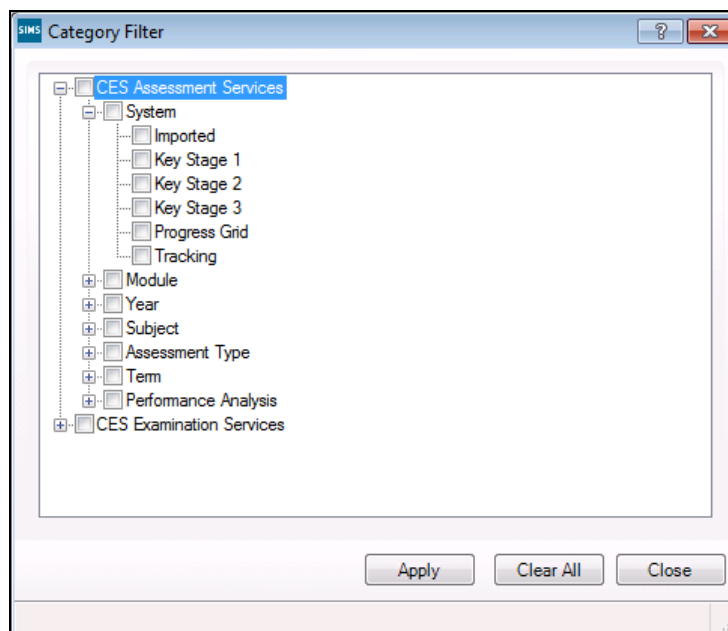
1. In the **Range Definitions** panel, click the **New** button to display the **Add/Edit Discover Range Definition** dialog.

The screenshot shows the 'Add/Edit Discover Range Definition' dialog box. It has a title bar with the SIMS logo and the text 'Add/Edit Discover Range Definition'. The dialog contains a 'Basic Details' section with four input fields: 'Source Aspect', 'Range Minimum', and 'Range Maximum'. There is also a search icon (magnifying glass) next to the 'Source Aspect' field. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

- Click the **Browser** button adjacent to the **Source Aspect** field to display the **Find Aspect** dialog.



- Enter the **Aspect Name**, the **Column Heading** or click the **Select Category** browser button to display the **Category Filter** dialog.



- Use the + and – symbols to expand and contract the tree structure and select the check box of any filters to be applied.
- Click the **Apply** button to return to the **Find Aspect** browser.
- Click the **Search** button to display a list of aspects that match the search criteria.
- Select the required **Aspect** and click the **OK** button.

Once an aspect has been selected, the remaining fields in the dialog are populated automatically from the existing range definition in SIMS Assessment or Examinations Organiser (depending on the filters applied).

SIMS Add/Edit Discover Range Definition

Basic Details

Source Aspect: Algebra Test Year 8

Range Minimum: 0.00

Range Maximum: 50.00

OK Cancel

8. Modify the **Range Minimum** and **Range Maximum** fields, if required.
9. Click the **OK** button to populate the **Range Definitions** panel.
10. In the **Result Set(s)** panel, click the **Add** button to display the **Find Result Set** dialog.

SIMS Find Result Set

Find Result Set

Search Print

Result Set Name: Module: Assessment Manager Supplier: Active Status: Active LockStatus: <Any>

Name	Module	Supplier	Status	Locked	Lock Date	Locked By
Key Stage 1 Validated Result	Assessment Manager	SIMS	Active	No		
Key Stage 2 Validated Result	Assessment Manager	SIMS	Active	No		
Key Stage 3 Validated Result	Assessment Manager	SIMS	Active	No		
KS4 Target	Assessment Manager	820 4321 Green Abbey School	Active	No		
Mock Exams	Assessment Manager	820 4321 Green Abbey School	Active	No		
QCDA Optional Tests Y07	Assessment Manager	CES Assessment Services	Active	No		
QCDA Optional Tests Y08	Assessment Manager	CES Assessment Services	Active	No		
QCDA Optional Tests Y09	Assessment Manager	CES Assessment Services	Active	No		
Year 1	Assessment Manager	678 0000 Torfaen LEA	Active	No		
Year 1 Autumn	Assessment Manager	678 0000 Torfaen LEA	Active	No		
Year 1 Spring	Assessment Manager	678 0000 Torfaen LEA	Active	No		
Year 1 Summer	Assessment Manager	678 0000 Torfaen LEA	Active	No		

OK Cancel

11. Enter the **Result Set Name**, if known or select the **Module** from the drop-down list.

The **Module** field filters the result sets on the name of the SIMS module that was originally used to create the result set, e.g. Assessment Manager, Examinations Organiser, etc.

The **Supplier** field displays the establishment that created the result set, e.g. your LA or someone in your own school.

12. Select the **Active Status** or **LockStatus** from the respective drop-down lists. Locking a result set prevents the entry or editing of results in any column associated with that result set. The **Lock Date** and **Locked By** details are displayed if the result set has previously been locked.
13. Click the **Search** button to display a list of result sets that match the search criteria entered.

14. Highlight the required **Name** and click the **OK** button.
15. Click the **OK** button to return to the **Discover Aspect Detail** page.

Discover Aspect Detail: Algebra Tests Year 8

Save Undo Print

1 Basic Details 2 Range Definitions 3 Result Set(s)

1 Basic Details

Name:

Column Heading:

Description:

External ID:

Mode:

Active: ☒

2 Range Definitions

Source Aspect	Column Heading	Range
Algebra Test Year 8	Algebra Test Year 8	0.00 - 50.00
2nd Highest Maths Test Score	2nd Highest Ma Score	0.00 - 100.00

New Open Delete

3 Result Set(s)

Name
Key Stage 1 Validated Result
Year 8

Add Remove

Creating an Amount of Progress Discover Aspect

When creating a new Discover aspect with the mode of Amount of Progress, the **Discover Aspect Detail** page contains two additional panels for completion, **Amount of Progress** and **Result Sets**.

The screenshot shows two panels in a software interface. The top panel, titled '2 Amount of Progress', contains two rows of input fields. The first row is labeled 'Source Aspect (From)' and the second 'Source Aspect (To)'. Each row has a text input field followed by a magnifying glass icon. The bottom panel, titled '3 Result Sets', contains two rows of input fields. The first row is labeled 'Result Set (From)' and the second 'Result Set (To)'. Each row has a text input field followed by a magnifying glass icon.

1. In the **Amount of Progress** panel, click the **Browser** button adjacent to the **Source Aspect (From)** field to display the **Find Aspect** dialog.

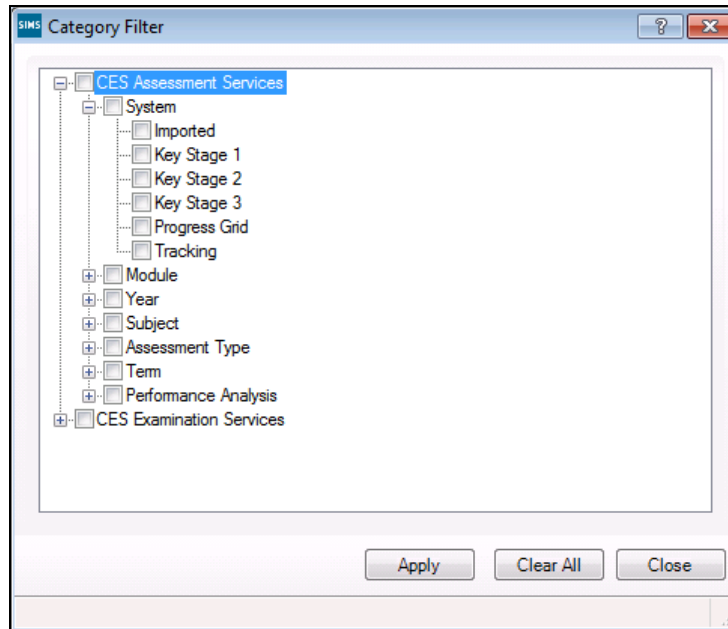
The screenshot shows the 'Find Aspect' dialog box. It has a title bar with 'SIMS Find Aspect'. Below the title bar is a toolbar with 'Search' and 'Print' icons. The main area contains several input fields: 'Aspect Name', 'Column Heading', 'Select Category', 'Type' (set to 'Grade'), 'Owner' (set to 'Any Aspect'), 'Active Status' (set to 'Active'), and 'Grade Set' (set to '*Level'). Below these fields is a table with the following columns: Name, Column Heading, Type, Owner, Grade Set, and Status. The table contains several rows of data, including 'English KS3 Predicted Level', 'English KS3 Target Level', 'English Present Level', '2 Levels Progress English', '2 Levels Progress Maths', '2 Levels Progress Science', 'EN KS2: English Test Lev', 'EN KS3: English Reading Test Level', 'EN KS3: English Test Level', and 'EN KS3: English Writing Test Level'. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Name	Column Heading	Type	Owner	Grade Set	Status
*English KS3 Predicted Level	*English KS3 Predicted Le	Grade		KS3 Sub Levels (GA) 1	Active
*English KS3Target Level	*English KS3Target Level	Grade		KS3 Sub Levels (GA) 1	Active
*English Present Level	*English Present Level	Grade		KS3 Sub Levels (GA) 1	Active
2 Levels Progress English	2 Levels Progress English	Grade		NC Whole Levels	Active
2 Levels Progress Maths	2 Levels Progress Maths	Grade		NC Whole Levels	Active
2 Levels Progress Science	2 Levels Progress Science	Grade		NC Whole Levels	Active
EN KS2: English Test Lev	English Test Level KS2	Grade		KS2 Sub Levels	Active
EN KS3: English Reading Test Level	EN Read Test Level KS3	Grade		KS3 Read/Write Test Lev...	Active
EN KS3: English Test Level	EN Test Level KS3	Grade		KS3 English Test Levels	Active
EN KS3: English Writing Test Level	EN Write Test Level KS3	Grade		KS3 Read/Write Test Lev...	Active



NOTE: Delete the default entry in the **Grade Set** field in the **Find Aspect** dialog to view all available aspects before searching.

2. Enter the **Aspect Name**, the **Column Heading** or click the **Select Category** browser button to display the **Category Filter** dialog.



3. Use the + and – symbols to expand and contract the tree structure and select the check box of any filters to be applied.
4. Click the **Apply** button to return to the **Find Aspect** browser.
5. Click the **Search** button to display a list of aspects that match the search criteria.
6. Select the required **Aspect** and click the **OK** button.

Click the **Browser** button adjacent to the **Source Aspect (To)** field to display the **Find Aspect** dialog again.

Repeat Steps 2-6 to populate the **Source Aspect (To)** field.

7. In the **Result Sets** panel, click the **Browser** button adjacent to the **Result Set (From)** field to display the **Find Result Set** dialog.

Name	Module	Supplier	Status	Locked	Lock Date	Locked By
Key Stage 1 Validated Result	Assessment Manager	SIMS	Active	No		
Key Stage 2 Validated Result	Assessment Manager	SIMS	Active	No		
Key Stage 3 Validated Result	Assessment Manager	SIMS	Active	No		
KS4 Target	Assessment Manager	820 4321 Green Abbey School	Active	No		
Mock Exams	Assessment Manager	820 4321 Green Abbey School	Active	No		
QCDA Optional Tests Y07	Assessment Manager	CES Assessment Services	Active	No		
QCDA Optional Tests Y08	Assessment Manager	CES Assessment Services	Active	No		
QCDA Optional Tests Y09	Assessment Manager	CES Assessment Services	Active	No		
Year 1	Assessment Manager	678 0000 Torfaen LEA	Active	No		
Year 1 Autumn	Assessment Manager	678 0000 Torfaen LEA	Active	No		
Year 1 Spring	Assessment Manager	678 0000 Torfaen LEA	Active	No		
Year 1 Summer	Assessment Manager	678 0000 Torfaen LEA	Active	No		

8. Enter the **Result Set Name**, if known or select the **Module** from the drop-down list.

The **Module** field filters the result sets on the name of the SIMS module that was originally used to create the result set, e.g. Assessment Manager, Examinations Organiser, etc.

The **Supplier** field displays the establishment that created the result set, e.g. your LA or someone in your own school.

9. Select the **Active Status** or **LockStatus** from the respective drop-down lists. Locking a result set prevents the entry or editing of results in any column associated with that result set. The **Lock Date** and **Locked By** details are displayed if the result set has previously been locked.
10. Click the **Search** button to display a list of result sets that match the search criteria entered.
11. Highlight the required **Name** and click the **OK** button.
12. Click the **Browser** button adjacent to the **Result Set (To)** field to display the **Find Result Set Browser** dialog again.

Repeat Steps 8-11 to populate the **Result Set (To)** field.

13. Click the **Save** button on the **Discover Aspect Detail** page to save the newly created Discover aspect.

Discover Aspect Detail: KS2-KS3 Progress Maths

Save Undo Print

1 Basic Details 2 Amount of Progress 3 Result Sets

1 Basic Details

Name: KS2-KS3 Progress Maths

Column Heading: KS2-KS3 Progress Maths

Description: KS2-KS3 Progress Maths

External ID: 3115

Mode: Amount of Progress

Active: ☒

2 Amount of Progress

Source Aspect (From): MA KS2: Maths Test Lev
Maths Test Level KS2

Source Aspect (To): MA KS3: Maths Test Level
MA Test Level KS3

3 Result Sets

Result Set (From): Key Stage 2 Validated Result

Result Set (To): Key Stage 3 Validated Result

Generating the Discover Aspect Results

Once the required Discover aspects have been defined, it is essential that the results for these aspects are generated in SIMS before the aspects, grade sets and result sets are transferred into Discover to be used in the creation of Assessment graphs.

Before the generation of results is begun, the **Aspect Result Generation Settings** can be modified, if required.

1. In SIMS, select **Tools | Performance | Analysis | Discover Setup** to display the **Discover Setup Details** page.

SIMS .net: Green Abbey School

Focus Reports Routines Tools Window Help

Back Forward

SIMS Shortcuts

Applications

Discover Setup Details

Save Undo Print

1 Aspect Result Generation Settings

1 Aspect Result Generation Settings

Before Transfers: ☒

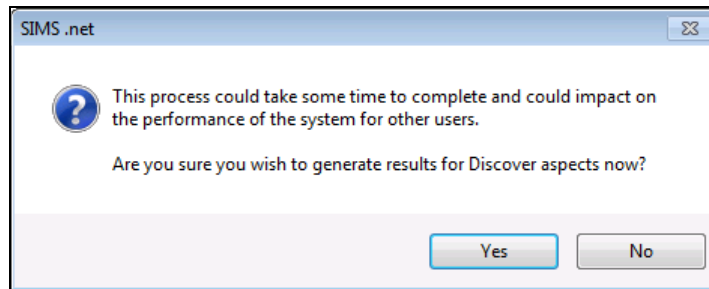
Day(s) Between Generation: 7

Generate Now

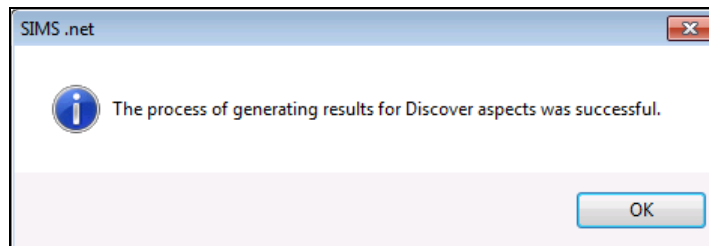
The **Before Transfers** check box is selected by default.

The **Day(s) Between Generation** field defaults to the number 1 but this can be changed to a different number of your choice. This figure indicates the numbers of days to elapse before the results are generated.

2. Click the **Save** button.
3. Click the **Generate Now** button to display the following warning message:



4. Click the **Yes** button to begin the generation of results for the Discover aspects. When the process is complete, a message is displayed.



Once the results have been created for the Discover aspects, you can begin incorporating the aspects, grade sets and result sets into your own Assessment graphs via the **Discover SIMS Configuration** utility.

05 Using the Discover SIMS Configuration Utility to Create Assessment Graphs

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Introduction

The **Discover SIMS Configuration** utility sits between SIMS and Discover and provides the ability to change or customise different areas within Discover. The **General Settings** page mainly concerns the display and interval ranges of specific graphs but the other pages of the **Discover SIMS Configuration** utility are instrumental in the creation of your own Assessment graphs.

Permissions

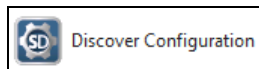
It is only possible to see data items in Discover for which you have been granted suitable permissions in SIMS.

- The following user roles can maintain the Assessment functions within the **Discover SIMS Configuration** utility:
 - Senior Management Team members
 - Assessment Coordinators.
- The following user roles can initiate the Transfer process from the **Discover SIMS Configuration** utility:
 - Senior Management Team members
 - School Administrators
 - Administration Assistants
 - Assessment Coordinators
 - System Managers.

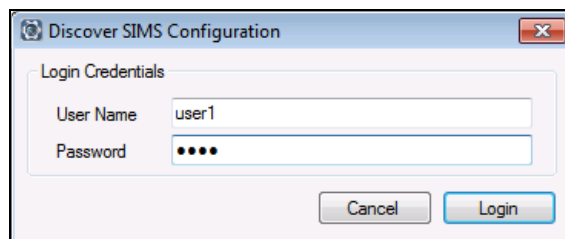
- The following user roles can add and amend aspects, result sets and Assessment graph parameters in the **Selected Aspects**, **Selected Result Sets** and **Assessment Graphs** pages in the **Discover SIMS Configuration** utility:
 - Senior Management Team members
 - Assessment Coordinators.

Logging into the Discover SIMS Configuration Utility

1. Click the **Start** button and select **All Programs | SIMS Applications | Discover Configuration**.
2. Alternatively, select the **Discover Configuration** icon from the list of frequently used programs.



3. Click the **Discover Configuration** icon to display the **Discover SIMS Configuration** dialog.



4. Specify your SIMS **Login Credentials** by entering your **User Name** and **Password**.
5. Click the **Login** button to display the **General Settings** page of the **Discover SIMS Configuration** utility.

Where your Windows account has been defined as a **Discover Group User** in SIMS with **Senior Management** and **System Manager** permissions, you can access the **Discover SIMS Configuration** utility without logging in.

Specifying the General Settings

The screenshot shows the 'Discover SIMS Configuration' window. The 'General Settings' tab is active. It contains several sections with input fields:

- Attendance Intervals:**
 - Percentage Attendance graph(s)*: Size (%) = 1.0, Count = 7
 - Percentage Lates graph(s)*: Size (%) = 1.0, Count = 7
- Achievement Intervals:**
 - Achievement Points graph(s)*: Size = 10, Count = 7
- Behaviour Intervals:**
 - Behaviour Points graph(s)*: Size = 10, Count = 7
 - Behaviour Incidents graph(s)*: Size = 10, Count = 7
- Exclusions Intervals:**
 - Excluded Days graph(s)*: Size = 10, Count = 7
- Postcode Analysis:**
 - UK Enquiries by Postcode graph(s)*: Level = Postcode Sector (eg "MK44 3")
- Transfer Offset:**
 - Time (h) = 0

In the **Attendance Intervals** panel, it is possible to specify the range to be used on the x-axis of the graphs.

6. For the **Percentage Attendance** and **Percentage Lates graph(s)** set the **Size (%)** to an interval between 0.2 and 20.0. The default is set to 1.0.
7. Set the **Count** to a figure between 4 and 10. The default is set to 7.

For example, if you select 7 data points in the **Count** field and you set the interval in the **Size (%)** field to 2.0, the x-axis of the graph shows seven bars for Attendance or Lates with an interval of 2% between them, e.g. 100%, 98%, 96%, 94%, 92%, 90% and <90%. The calculated value for a student's percentage attendance is always rounded down so, in this example, students with 98.1% or 99.9% are included in the 2nd bar of the graph.



IMPORTANT NOTE: The combination of the interval and the number of data points cannot allow the x-axis range to be less than 0% or greater than 100%.

8. In the **Achievement Intervals** panel, set the **Size** to an interval between 2 and 100. The default is set to 10 for **Achievement Points graphs(s)**.
9. Set the **Count** to a figure between 4 and 10. The default is set to 7.

For example, if you select 7 data points in the **Count** field and you set the interval in the **Size** field to 10, the x-axis of the graph shows seven bars for Achievements with an interval of 10 points between them, e.g. 0, 1-10, 11-20, 21-30, 31-40, 41-50 and 51+.

10. In the **Behaviour Intervals** panel, set the **Size** to an interval between 2 and 100. The default is set to 10 for both **Behaviour Points** and **Behaviour Incidents** graph(s).

Discover SIMS Configuration

Save Undo Transfer Transfer Progress: Transfer requested - waiting for service...

General Settings | Selected Aspects | Selected Result Sets | Assessment Graphs

Attendance Intervals

Percentage Attendance graph(s)	Size (%)	1.0	Count	7
Percentage Lates graph(s)	Size (%)	1.0	Count	7

Achievement Intervals

Achievement Points graph(s)	Size	10	Count	7
-----------------------------	------	----	-------	---

Behaviour Intervals

Behaviour Points graph(s)	Size	10	Count	7
Behaviour Incidents graph(s)	Size	10	Count	7

Exclusions Intervals

Excluded Days graph(s)	Size	10	Count	7
------------------------	------	----	-------	---

Postcode Analysis

UK Enquiries by Postcode graph(s)	Level	Postcode Sector (eg "MK44 3")
-----------------------------------	-------	-------------------------------

Transfer Offset

Time (h)	0
----------	---

11. Set the **Count** to a figure between 4 and 10. The default is set to 7.

For example, if you select 7 data points in the **Count** field and you set the interval in the **Size** field to 10, the x-axis of the graph shows seven bars for **Behaviour Points** and **Behaviour Incidents** with an interval of 10 points/incidents between them, e.g. 0, 1-10, 11-20, 21-30, 31-40, 41-50 and 51+.

12. In the **Exclusions Intervals** panel, set the **Size** to an interval between 2 and 20. The default is set to 10.

13. Set the **Count** to a figure between 4 and 10. The default is set to 7.

For example, if you select 7 data points in the **Count** field and you set the interval in the **Size** field to 10, the x-axis of the graph shows seven bars for Exclusion Days with an interval of 10 days between them, e.g. 0, 1-10, 11-20, 21-30, 31-40, 41-50 and 51+.

In the **Postcode Analysis** panel, it is possible to specify the depth of the search level when analysing postcode data. Some schools may have a high proportion of international students or boarders who are not educated within their residential area, whereas, some Primary schools may have a very low number of pupils who live outside the school's catchment area. To enable both types of school to specify how the Postcode Analysis is conducted, there are four depths of search level available:

Postcode Area (e.g. "MK")

Postcode District (e.g. "MK44")

Postcode Sector (e.g. "MK44 3")

Postcode Unit (e.g. "MK44 3JZ")

14. Click the **Level** drop-down list and select the appropriate search depth for your school. The default is set to Postcode Sector (e.g. MK44 3) which is an example only.
15. In the **Transfer Offset** panel, it is possible to specify the number of hours, either before or after its preset time, when the transfer of data from SIMS to the Discover database will take place. This is only a precaution in the unlikely event that the transfer is unable to complete successfully at its preset time because it has overlapped or coincided with another backup routine, for example.

It is possible to offset the **Time (h)** by up to **+12** or **-12** hours from the original preset time.



IMPORTANT NOTE: *It is strongly recommended that transfer routines are not set to run at 12 midnight as memberships generally change at this time. The transfer routines should be staggered to run one after another with a suitable time lapse in between to ensure that each routine has sufficient time to complete successfully.*

- For example, if the transfer of data from SIMS to Discover is scheduled to run at 23.00 or 11pm every night, entering a 2 in the **Transfer Offset** field ensures that the memberships will be as of the following day.
- The transfer is always run at the time specified in the scheduled task, but the effective date for all dated queries is the current date and time at the point of execution with the offset number of hours added to that (either positive or negative).
 - For example, a scheduled task run at 01:00 (or 1.00am), with transfer offset of 0 - transfer is actually run at 01:00 (or 1.00am), and all dated queries use 01:00 (or 1.00am) the same day when viewing dated memberships.
 - For example, a scheduled task run at 23:00 (or 11.00pm), with transfer offset of 2 - transfer is actually run at 23:00 (or 11.00pm), but all dated queries use 01:00 (or 1.00am) the next day when viewing dated memberships.

If another backup routine is still running at 1am, the routine attempts to run on five consecutive occasions with an interval of one minute between each attempt. If it is still not possible for the routine to run, an error is logged in the `Discover.Warehouse.Service.log` for your information.

The log file is located in the local application data directory of the service you are running. For example, in Windows 7, when running the service as `MYCOMPUTER\DiscoverTransfer`, the log file is located in the `C:\Windows\ServiceProfiles\NetworkService\AppData\Local\Discover` directory on the machine that the service is running on. The log file can be viewed and opened using Microsoft Notepad or the **Discover Log Viewer** utility.

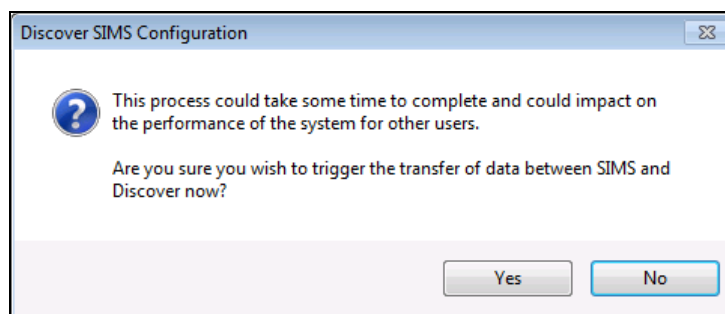
The **Undo** button can only be used to undo any unsaved changes.

16. Click the **Save** button to capture the changes.

Click the **Transfer** button at any time to initiate an immediate transfer without waiting until the preset time.



NOTE: Please ensure that no other users will be affected by the transfer process before continuing.



17. Click the **Yes** button to proceed with the Transfer process.

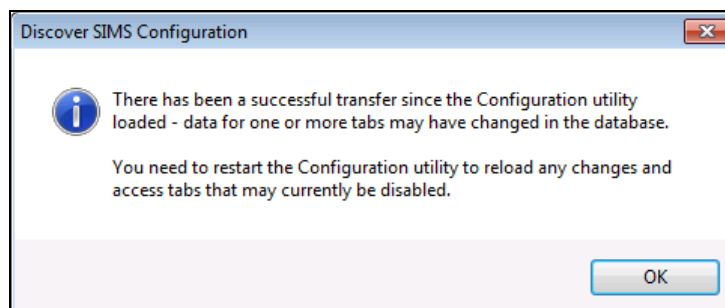
The remaining pages of the **Discover SIMS Configuration** utility are instrumental in enabling you to create your own Assessment graphs. For more detailed information, please refer to *Chapter 5: Creating Your Own Assessment Graphs* in the *Discover User Guide*.

Transfer Progress Messages and What they Mean

When the Transfer process is initiated by clicking the **Transfer** button on the **Discover SIMS Configuration** utility, a number of possible messages may be displayed for information as the routine progresses.

Message Displayed	Occurrence	Message Meaning
Transfer yet to be run	After installation of Discover but before any attempt has been made to transfer the data.	You must initiate the first Transfer process before using Discover.
Transfer requested, waiting for service	After the scheduled task has begun or you request a Transfer manually.	The SIMS Discover Data Transfer Service is pending.
Transfer started	After the SIMS Discover Data Transfer Service responds to the request and has started a Transfer.	The Transfer process is underway.
Transfer succeeded	After a Transfer has completed successfully.	The Transfer process was successful.
Transfer failed, will try again in <i>N</i> seconds	After a Transfer has completed with an error (typically <i>N</i> is 60 seconds for default settings).	The Transfer process tries to run on five consecutive attempts.
Transfer failed, see log file for details	After the final attempt (usually 5), the transfer has completed with an error.	Please see the <i>Reviewing the Discover Warehouse Log File</i> section below.

If the transfer process has completed successfully, the following message is displayed and it is strongly recommended that you close the **Discover SIMS Configuration** utility and re-open it before accessing Discover.



The status of a pending or previous **Transfer** can be viewed by hovering over the **Transfer Progress** field in the **Discover SIMS Configuration** utility. The following states are reported:

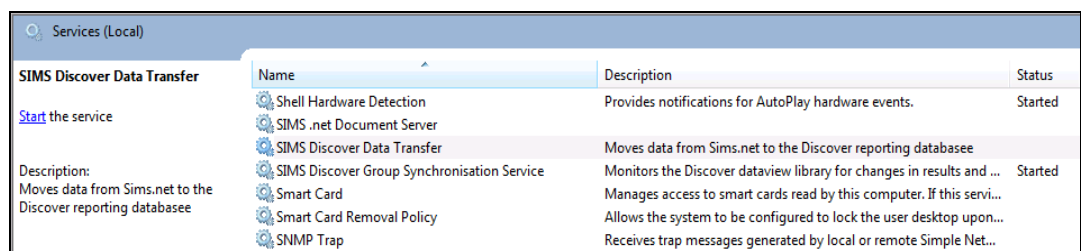
- Progress last updated on 15/02/2011 at 11.02. There has never been a successful transfer!
- Progress last updated on 15/02/2011 at 11.02. Last successful transfer on 14/02/2011 at 01.03.
- Data transfer triggered.

Investigating a Pending Transfer

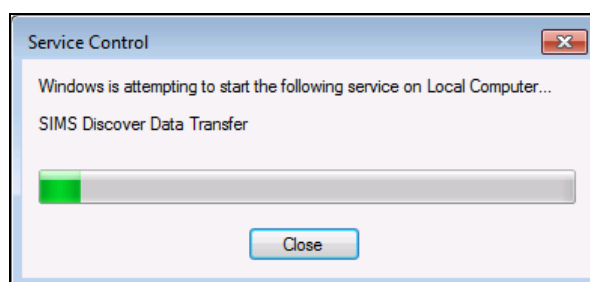
If the Transfer process fails to initiate after several minutes, you should check that the **SIMS Discover Data Transfer** service is running.

1. From the **Control Panel** on the server that is running the **SIMS Discover Data Transfer** service, select the **Administrative Tools** icon and click **Services** to display the **Services (Local)** page.
2. Scroll down the page until you locate the details of the **SIMS Discover Data Transfer** service.

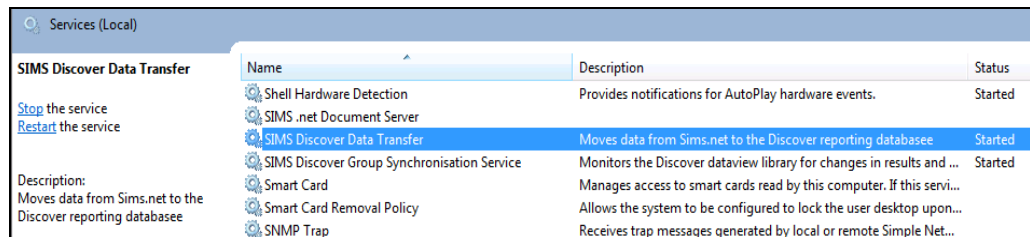
The **Status** of this service should be displayed as **Started**.



3. If this is not the case, highlight the name of the service and click on **Start the service** in the left-hand column of the **Services (Local)** page.



The selected service should now start.



Services (Local)			
	Name	Description	Status
SIMS Discover Data Transfer Stop the service Restart the service Description: Moves data from Sims.net to the Discover reporting database	Shell Hardware Detection	Provides notifications for AutoPlay hardware events.	Started
	SIMS .net Document Server		
	SIMS Discover Data Transfer	Moves data from Sims.net to the Discover reporting database	Started
	SIMS Discover Group Synchronisation Service	Monitors the Discover dataview library for changes in results and ...	Started
	Smart Card	Manages access to smart cards read by this computer. If this servi...	
	Smart Card Removal Policy	Allows the system to be configured to lock the user desktop upon...	
	SNMP Trap	Receives trap messages generated by local or remote Simple Net...	

The Transfer process will initiate when the service is running and no further action is required.

If the Transfer process still fails to initiate, please review the `Discover.Warehouse.Service.log` for further information.

Reviewing the Discover Warehouse Service Log File

Every time the Transfer process is run, a log file entry is recorded in the `Discover.Warehouse.Service.log`. This log file details any issues identified in the data during the Transfer process and also acts as an audit log for any usage or error messages that may occur whilst using Discover.

The log file is located in the local application data directory of the service you are running. For example, in Windows 7, when running the service as `MYCOMPUTER\DiscoverTransfer`, the log file is located in the `C:\Windows\ServiceProfiles\NetworkService\AppData\Local\Discover` directory on the machine that the service is running on. The log file can be viewed and opened using Microsoft Notepad or an xml editing programme.

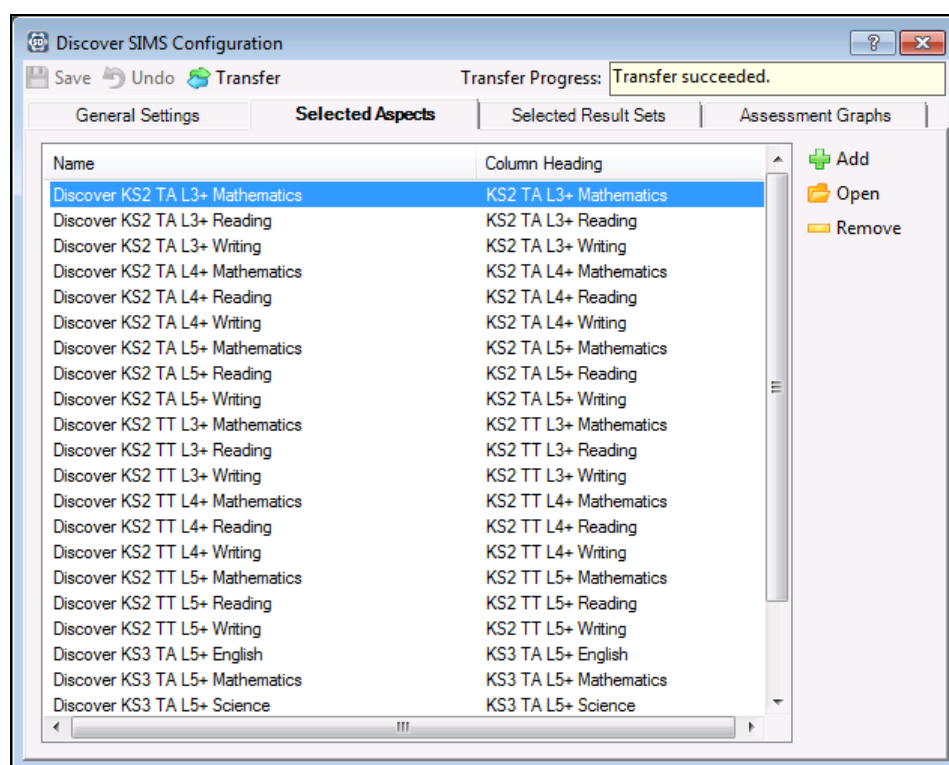
Selecting Aspects to Build Assessment Graphs in Discover

The **Selected Aspects** page is empty until the first **Transfer** process is complete. Once the first transfer has completed successfully, the aspects used to build the pre-defined Assessment graphs provided in Discover, are visible in the **Selected Aspects** page.



More Information:

Pre-defined Graphs Available in Discover on page 25



Once you have created your own Discover aspects in SIMS and generated the results for these aspects, these can be transferred into Discover where they can be incorporated into your own Assessment graphs.

After the **Transfer** process has completed successfully, the Discover and Assessment aspects can be selected for use from the **Selected Aspects** page of the **Discover SIMS Configuration** utility.



IMPORTANT NOTE: It is suggested that you click the **Transfer** button when you have made any changes in the **Discover SIMS Configuration** utility as this ensures that the changes are made straightaway. However, please ensure that this action will not affect other users of SIMS and Discover before proceeding.

1. In the **Selected Aspects** page, click the **Add** button to display the **Find Aspects** dialog.

Name	Column Heading	Type	Grade Set
*English KS3 Predicted Level	*English KS3 Predicted Le	Grade	KS3 Sub Levels (GA) 1
*English KS3Target Level	*English KS3Target Level	Grade	KS3 Sub Levels (GA) 1
*English Present Level	*English Present Level	Grade	KS3 Sub Levels (GA) 1
*English Progress Since Last Term	*English Progress Since L	Grade	*Progress + = -
*English Progress Towards Target	*English Progress Towards	Grade	*Progress + = -
2 Levels Progress English	2 Levels Progress English	Grade	NC Whole Levels
2 Levels Progress Maths	2 Levels Progress Maths	Grade	NC Whole Levels
2 Levels Progress Science	2 Levels Progress Science	Grade	NC Whole Levels
2nd Highest Maths Test Score	2nd Highest Ma Score	Marks-Integer	
Absent Disapplied or Left En KS2	Absent Disapplied Left En	Grade	Special Grades KS2
Absent Disapplied or Left Ma KS2	Absent Disapplied Left Ma	Grade	Special Grades KS2
Absent Disapplied or Left Sc KS2	Absent Disapplied Left Sc	Grade	Special Grades KS2
AEB QCA2240 GCEL/A Forecast	32 Q2240 GCEL/A Fcst	Grade	JC I Forecast
AEB QCA2240 GCEL/A Result	32 Q2240 GCEL/A Rslt	Grade	JC I Result
AEB QCA3810 GCEL/A Forecast	32 Q3810 GCEL/A Fcst	Grade	JC I Forecast
AEB QCA3810 GCEL/A Result	32 Q3810 GCEL/A Rslt	Grade	JC I Result
AEB QCA3910 GCEL/A Forecast	32 Q3910 GCEL/A Fcst	Grade	JC I Forecast
AEB QCA3910 GCEL/A Result	32 Q3910 GCEL/A Rslt	Grade	JC I Result
AEB QCA4010 GCEL/A Forecast	32 Q4010 GCEL/A Fcst	Grade	JC I Forecast

2904 matches found

2. Enter the **Name** or the **Column Heading** of the aspect that you are looking for.
3. Alternatively, enter the **Module** or the **Supplier** name, if known.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services, CES Examination Services, etc.

The **Supplier** field displays the establishment that created the aspect, e.g. your LA or someone in your own school.

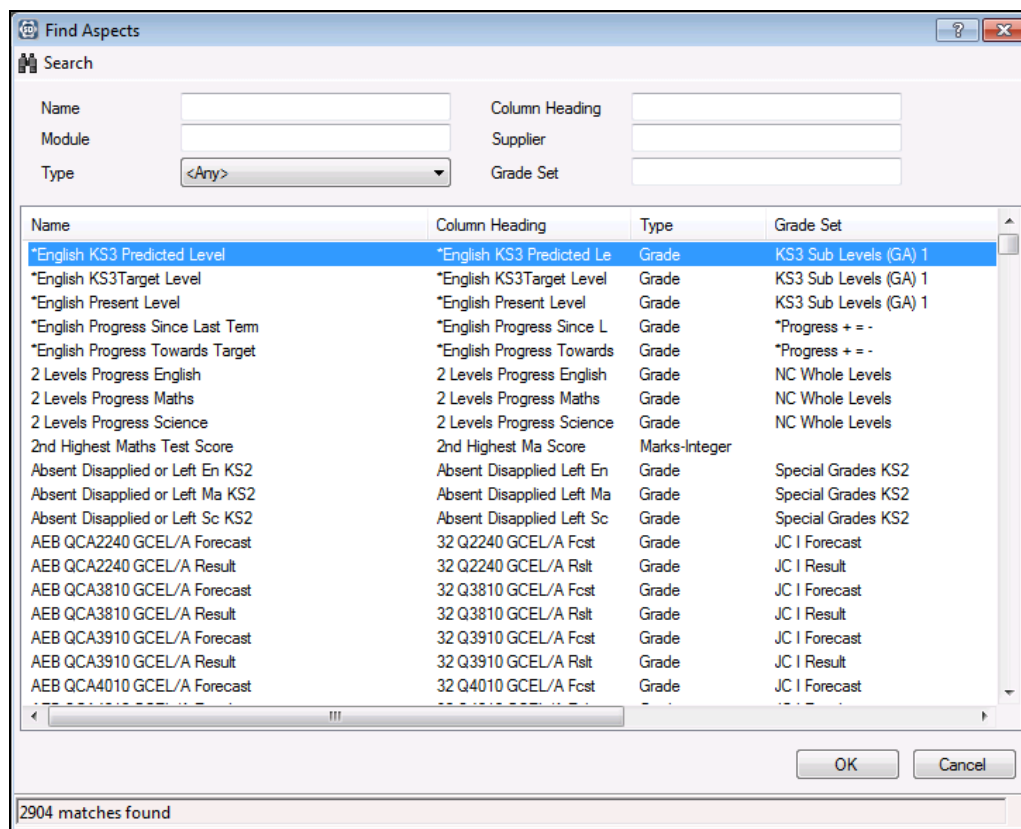
4. Select the appropriate **Type** from the drop-down list or enter the **Grade Set** name before clicking the **Search** button.

The dialog is populated with a list of aspects that match the search criteria entered.

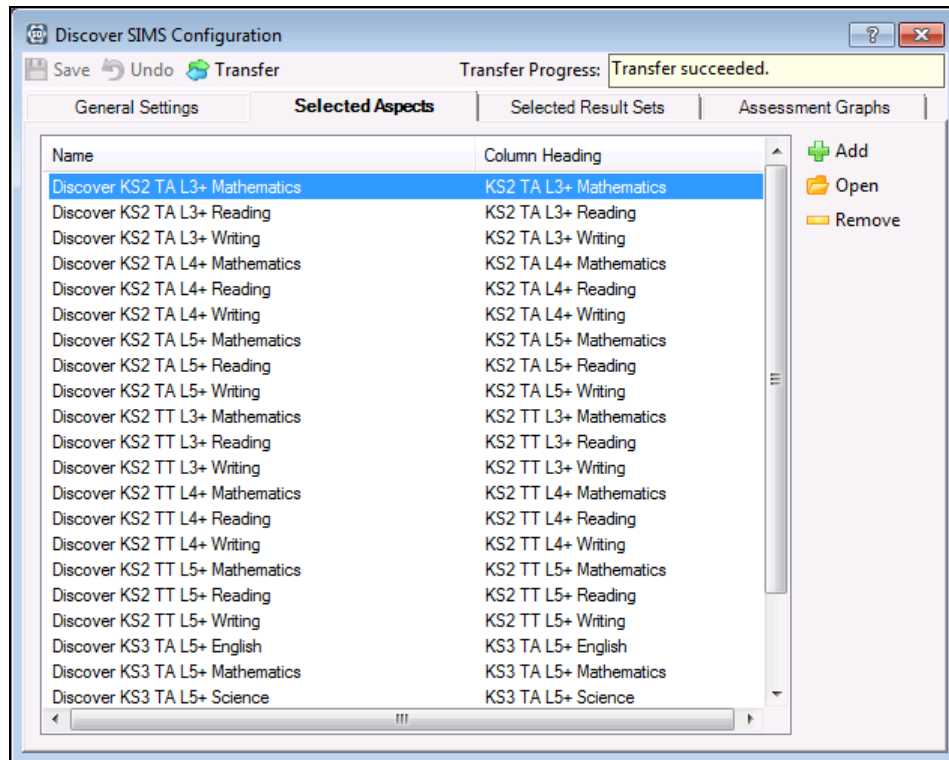
It is possible to leave all the search fields blank before clicking the **Search** button to display a list of all available aspects, if details of a specific aspect are not known.

5. Select the required aspect and click the **OK** button to copy the aspect into the list of those available for use when creating Assessment graphs in Discover.

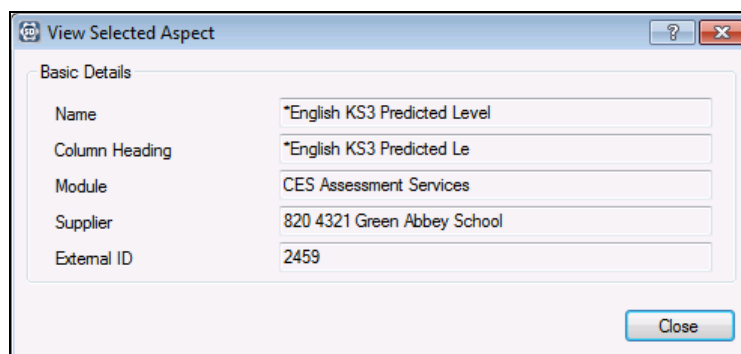
6. Click the **Add** button on the **Selected Aspects** page to display the **Find Aspects** dialog again and continue selecting the aspects that you want to use in Discover.



7. Click the **OK** button when you have selected the required aspects to return to the **Selected Aspects** page of the **Discover SIMS Configuration** utility.



To view the properties of an aspect, highlight an aspect **Name** and click the **Open** button to display the **View Selected Aspect** dialog.



The **Module**, **Supplier** name and the **External ID** are displayed together with the **Name** and **Column Heading**. It is not possible to edit or modify the properties of the selected aspect from this dialog. Click the **Close** button to return to the **Selected Aspects** page.

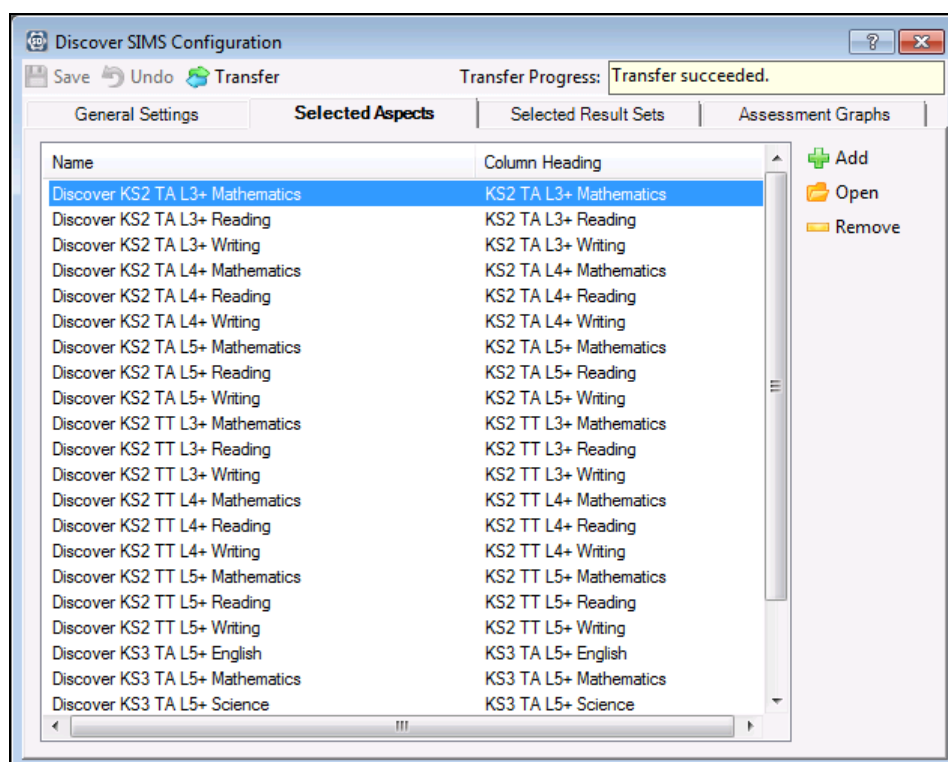
Alternatively, highlight an aspect **Name** and click the **Remove** button to delete the selected aspect from the list of those available for selection.

The **Undo** button can be used to undo any unsaved changes. Please be aware that all unsaved changes will be lost, not just the last action.

8. Click the **Save** button when you have selected all the required aspects.

You can revisit the **Selected Aspects** page of the **Discover SIMS Configuration** utility whenever you want to copy additional aspects into Discover from SIMS.

9. After saving your changes, the **Transfer** button becomes active.

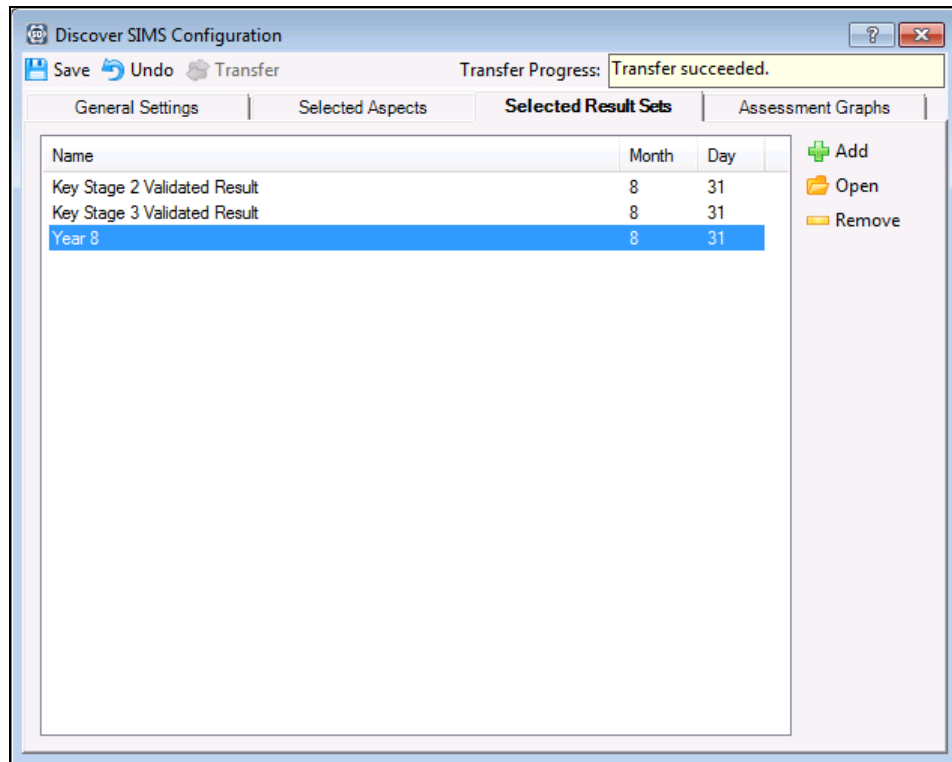


IMPORTANT NOTE: It is suggested that you click the **Transfer** button when you have made any changes in the **Discover SIMS Configuration** utility as this ensures that the changes are made straightaway. However, please ensure that this action will not affect other users of SIMS and Discover before proceeding.

10. Click the **Transfer** button to initiate the transfer process.

Selecting Result Sets to Build Assessment Graphs in Discover

The **Selected Result Sets** page is empty until the first **Transfer** process is initiated.



1. In the **Selected Result Sets** page, click the **Add** button to display the **Find Result Sets** dialog.

Name	Module	Supplier
DOM 2010	CES Examination Services	820 4321 Green Abbey School
January Exams 2003	CES Examination Services	820 4321 Green Abbey School
January Exams 2004	CES Examination Services	820 4321 Green Abbey School
January Exams 2005	CES Examination Services	820 4321 Green Abbey School
January Exams 2006	CES Examination Services	820 4321 Green Abbey School
January Exams 2007	CES Examination Services	820 4321 Green Abbey School
January Exams 2008	CES Examination Services	820 4321 Green Abbey School
January Exams 2009	CES Examination Services	820 4321 Green Abbey School
June (Summer) Exams 2002	CES Examination Services	820 4321 Green Abbey School
June (Summer) Exams 2003	CES Examination Services	820 4321 Green Abbey School
June (Summer) Exams 2004	CES Examination Services	820 4321 Green Abbey School
June (Summer) Exams 2005	CES Examination Services	820 4321 Green Abbey School
June (Summer) Exams 2006	CES Examination Services	820 4321 Green Abbey School
June (Summer) Exams 2007	CES Examination Services	820 4321 Green Abbey School
June (Summer) Exams 2008	CES Examination Services	820 4321 Green Abbey School
June (Summer) Exams 2009	CES Examination Services	820 4321 Green Abbey School
June (Summer) Exams 2010	CES Examination Services	820 4321 Green Abbey School
Key Stage 1 Validated Result	CES Assessment Services	SIMS
Key Stage 2 Validated Result	CES Assessment Services	SIMS
Key Stage 3 Validated Result	CES Assessment Services	SIMS
KS4 Target	CES Assessment Services	820 4321 Green Abbey School
March Exams 2005	CES Examination Services	820 4321 Green Abbey School

83 matches found

2. Enter the **Name** of the result set.
3. Alternatively, enter the **Module** name or the **Supplier** name before clicking the **Search** button.

The **Module** field filters the result sets on the name of the SIMS module that was originally used to create the result set, e.g. CES Examination Services, CES Assessment Services, etc.

The **Supplier** field displays the establishment that created the result set, e.g. your LA or someone from your own school.

The dialog is populated with a list of result sets that match the search criteria entered.

It is possible to leave all the search fields blank before clicking the **Search** button to display a list of all available result sets, if details of a specific result set are not known.

4. Select the required result set and click the **OK** button to copy it into the list of those available for use when creating Assessment graphs in Discover.

5. Click the **Add** button to display the **Find Result Sets** dialog again and continue selecting the result sets that you want to use in Discover. You can revisit the **Selected Result Sets** page of the **Discover SIMS Configuration** utility whenever you want to copy additional result sets into Discover from SIMS.

Multiple result sets can be selected in a block using the Shift key. Multiple result sets that are spaced throughout the list can be selected collectively using the Ctrl key.

To view the properties of a result set, highlight a result set **Name** and click the **Open** button to display the **Edit Selected Result Set** dialog.

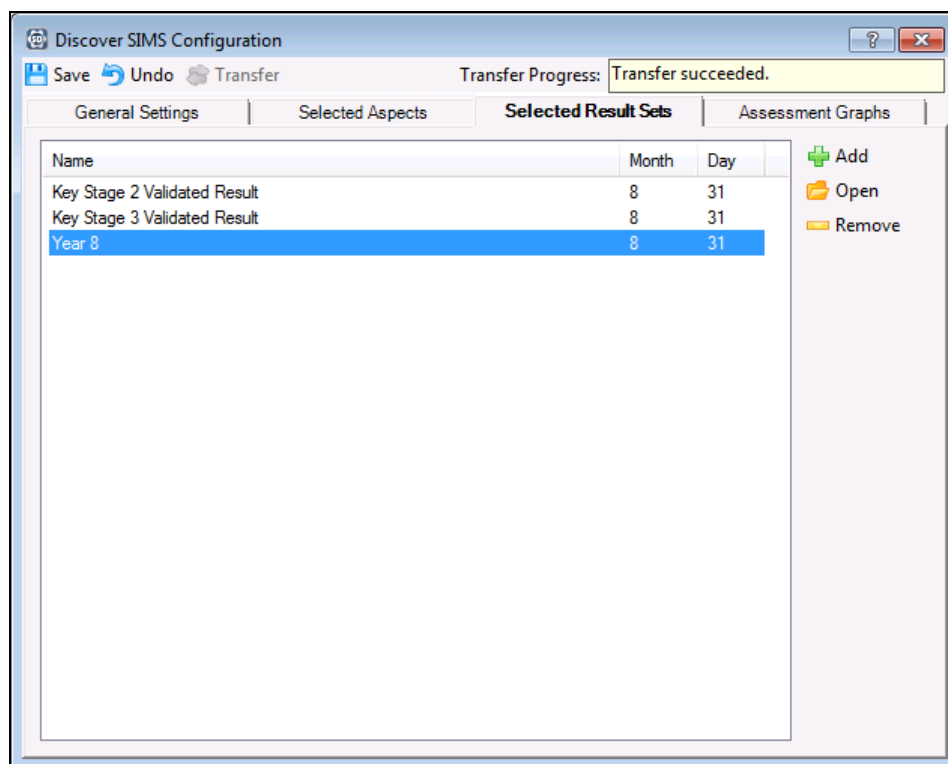
The screenshot shows a Windows-style dialog box titled "Edit Selected Result Set". It has a standard title bar with a question mark icon and a close button (X). The main area is labeled "Basic Details" and contains six text input fields arranged vertically. The values entered in these fields are: "Year 8" for Name, "8" for Month, "31" for Day, "CES Assessment Services" for Module, "820 4321 Green Abbey School" for Supplier, and "35" for External ID. At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

The figure in the **Month** field represents the number of the month in the calendar, e.g. August is month 8, December is month 12, etc.

The figure in the **Day** field represents the day of the month, e.g. 31st of August is the default end of the academic year. The graphs in Discover are compiled of data over an entire academic year. Result sets from Assessment are not dated so in order to make a comparison against other data, e.g. Attendance data, a default date has been entered.

The **Day** and **Month** fields for a result set either represent the end of the academic year or the end of the term, whichever is applicable to the result set. For example, the *Key Stage 2 Validated Result* is set to **Month 8** and **Day 31**. A result set for a term, for example, the *Year 7 Autumn Term* is set to **Month 12** and **Day 31**. The **Day** and **Month** fields can be amended, if required.

6. Click the **OK** button to return to the **Selected Result Sets** page.



Alternatively, highlight a result set name from the **Selected Result Sets** page and click the **Remove** button to delete the name of the selected result sets from the list of those available for selection.

The **Undo** button can be used to undo any unsaved changes. Please be aware that all unsaved will be lost, not just the last action.

7. Click the **Save** button when you have selected all the required result sets.

You can revisit the **Selected Result Sets** page of the **Discover SIMS Configuration** utility whenever you want to copy additional result sets into Discover from SIMS.

After saving your changes, the **Transfer** button becomes active.



IMPORTANT NOTE: It is suggested that you click the **Transfer** button when you have made any changes in the **Discover SIMS Configuration** utility as this ensures that the changes are made straightaway. However, please ensure that this action will not affect other users of SIMS and Discover before proceeding.

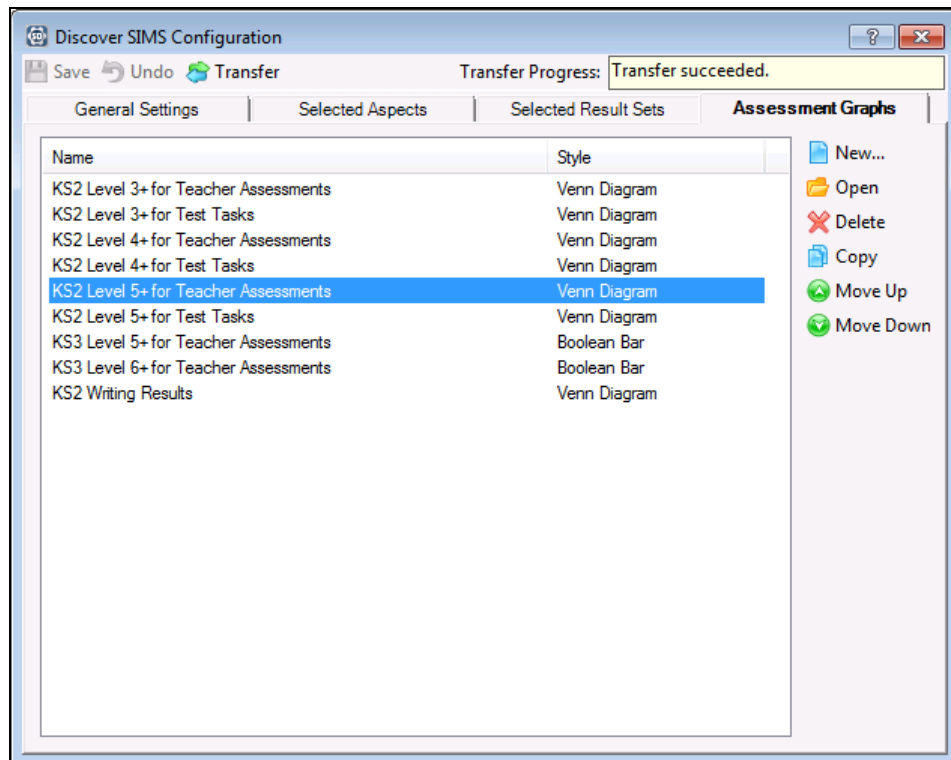
Understanding the Assessment Graphs Page

The **Assessment Graphs** page is initially populated with the details of the pre-defined Assessment graph definitions that have been supplied by Capita SIMS. The pre-defined graph definitions are in the **Style** of a **Venn Diagram** or a **Boolean Bar** (true/false) graph, only. It is not possible to edit these pre-defined definitions but you can create a new graph of your own specification based on an existing definition.

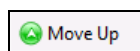


More Information:

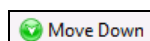
Pre-defined Graphs Available in Discover on page 25



In the **Assessment Graphs** page, you can highlight the **Name** of an existing graph definition and click the **Move Up** or **Move Down** button to re-arrange the display order of the graph definitions.



Move Up button



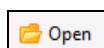
Move Down button

The order of the list on the **Assessment Graphs** page is reflected in Discover. The list can be accessed from the **Assessment** button on the **Discover Application Bar**.



Assessment button

Highlight any of the existing pre-defined graph definitions and click the **Open** button to display the **Add / Edit Assessment Graph** dialog.



Open button

The fields on this dialog vary depending on the **Style** of the graph definition that you are viewing or creating.

Add/Edit Assessment Graph

Basic Details

Name: KS3 Level 5+ for Teacher Assessments

Description: Pupils achieving L5+ in English, Mathematics and Science a

Topic Fragment: KS3 TA

Style: Boolean Bar

Pastoral Group Type: National Curriculum Year

Pastoral Group: Curriculum Year 10

Boolean Bar Specific Details

Grade Set: Discover Boolean Result

Aspects

Name	Column Heading	Legend
Discover KS3 TA...	KS3 TA L5+ En...	English L5+
Discover KS3 TA...	KS3 TA L5+ Ma...	Mathematics L5+
Discover KS3 TA...	KS3 TA L5+ Sci...	Science L5+

Result Set: Key Stage 3 Validated Result

Show True Series: ☒

Show False Series: ☐

Default View Mode: Bar Graph

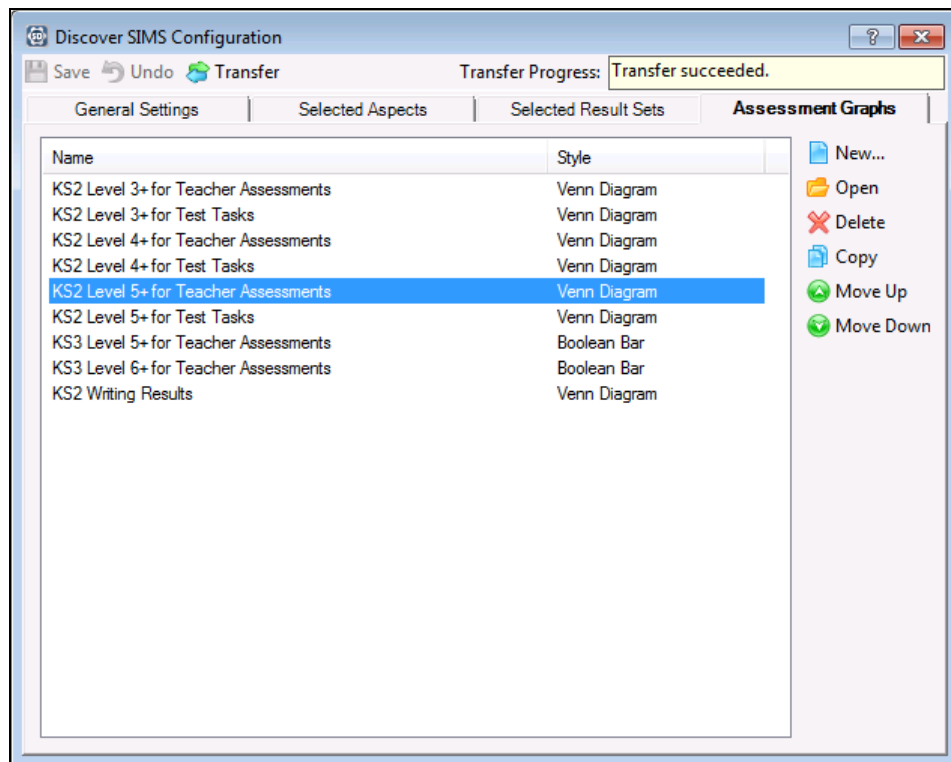
OK Cancel

You cannot change the information for any of the pre-defined graph definitions unless you decide to copy the definition and use it as the basis for a new Assessment graph definition. Please see *Copying an Existing Assessment Graph Definition* on page 81 for more information.

Copying an Existing Assessment Graph Definition

This section uses the **Discover Venn Diagram Style** as an example to illustrate how to copy an existing graph definition. If you want to create a new graph of this **Style**, please click the **New** button instead of the **Copy** button to display the **Add/Edit Assessment Graph** dialog and follow the instructions below.

1. In the **Assessment Graphs** page of the **Discover SIMS Configuration** utility, highlight an existing pre-defined graph definition.



In this example, a new graph definition is being created based on an existing Venn diagram graph definition.

- Click the **Copy** button to display the **Add/Edit Assessment Graph** dialog for the selected graph definition.

When copying an existing Assessment graph definition to use it as the basis for a new graph definition, the majority of the fields can be changed to reflect your new selections.

- In the **Basic Details** panel, enter a unique **Name** for the new graph definition.
- Enter a meaningful **Description** that enables you to differentiate this Assessment graph from other, existing graph definitions.
- Enter a **Topic Fragment**. This is a short abbreviation of the graph name and is displayed as the secondary title of the graph when it is compiled on the Discover canvas.

The **Style** field is populated automatically with the type of graph that you have chosen to define and cannot be changed.

The **Pastoral Group Type** field defaults to National Curriculum year but this can be changed by selecting an alternative cohort of pupil/students from the drop-down list.

6. Select the **Pastoral Group** from the drop-down list. This list is restricted by the cohort selected in the **Pastoral Group Type** field above, e.g. if National Curriculum Year is selected as the Pastoral Group Type, you can only select the pastoral group from a list of National Curriculum Years.

In the **Venn Diagram Specific Details** panel, the **Grade Set** defaults to **Discover Boolean Result** and this cannot be changed.

The **Left Series**, **Right Series** and **Top Series** panels relate directly to the circles that are created when the graph definition is output as a Venn diagram. The **Top Series** is optional and can be included in the graph output by selecting the check box.

7. In the **Left Series** panel, click the **Browser** button adjacent to the **Aspect** field to display the **Find Aspects** dialog.

Name	Column Heading	Type	Grade Set
Discover KS2 TA L3+ Mathematics	KS2 TA L3+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TA L3+ Reading	KS2 TA L3+ Reading	Grade	Discover Boolean Result
Discover KS2 TA L3+ Writing	KS2 TA L3+ Writing	Grade	Discover Boolean Result
Discover KS2 TA L4+ Mathematics	KS2 TA L4+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TA L4+ Reading	KS2 TA L4+ Reading	Grade	Discover Boolean Result
Discover KS2 TA L4+ Writing	KS2 TA L4+ Writing	Grade	Discover Boolean Result
Discover KS2 TA L5+ Mathematics	KS2 TA L5+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TA L5+ Reading	KS2 TA L5+ Reading	Grade	Discover Boolean Result
Discover KS2 TA L5+ Writing	KS2 TA L5+ Writing	Grade	Discover Boolean Result
Discover KS2 TT L3+ Mathematics	KS2 TT L3+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TT L3+ Reading	KS2 TT L3+ Reading	Grade	Discover Boolean Result
Discover KS2 TT L3+ Writing	KS2 TT L3+ Writing	Grade	Discover Boolean Result
Discover KS2 TT L4+ Mathematics	KS2 TT L4+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TT L4+ Reading	KS2 TT L4+ Reading	Grade	Discover Boolean Result
Discover KS2 TT L4+ Writing	KS2 TT L4+ Writing	Grade	Discover Boolean Result
Discover KS2 TT L5+ Mathematics	KS2 TT L5+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TT L5+ Reading	KS2 TT L5+ Reading	Grade	Discover Boolean Result
Discover KS2 TT L5+ Writing	KS2 TT L5+ Writing	Grade	Discover Boolean Result
Discover KS3 TA L5+ English	KS3 TA L5+ English	Grade	Discover Boolean Result

8. Enter the **Name** or the **Column Heading** of the aspect that you are looking for.
9. Alternatively, enter the **Module** or the **Supplier** name, if known.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Discover Services.

The **Supplier** field displays the establishment that created the aspect, e.g. your LA or someone in your own school.

10. Select the appropriate **Type** from the drop-down list. The **Grade Set** name cannot be changed.

11. Click the **Search** button.

The dialog is populated with a list of aspects that match the search criteria entered.

It is possible to leave all the search fields blank before clicking the **Search** button to display a list of all available aspects, if details of a specific aspect are not known.

12. Select the required aspect and click the **OK** button to select it.

In the **Add/Edit Assessment Graph** dialog, beneath the **Aspect** name, the **Column Heading** is populated automatically when the Aspect is selected.

Add/Edit Assessment Graph

Basic Details

Name: Copy of KS2 Level 5+ for Teacher Assessments

Description: Pupils achieving L5+ in Reading, Writing and Mathematics a

Topic Fragment: KS2 TA

Style: Venn Diagram

Pastoral Group Type: National Curriculum Year

Pastoral Group: Curriculum Year 7

Venn Diagram Specific Details

Grade Set: Discover Boolean Result

Left Series

Aspect: Discover KS2 TA L5+ Writing

KS2 TA L5+ Writing

Legend: Writing L5+

Right Series

Aspect: Discover KS2 TA L5+ Reading

KS2 TA L5+ Reading

Legend: Reading L5+

Top Series ☒ (optional)

Aspect: Discover KS2 TA L5+ Mathematics

KS2 TA L5+ Mathematics

Legend: Mathematics L5+

Result Set: Key Stage 2 Validated Result

OK Cancel

The **Legend** field is populated automatically from the selected Aspect name. This will be the name of the data item that is displayed on the x axis of the graph when it is compiled on the Discover canvas. This name can be amended, if required.

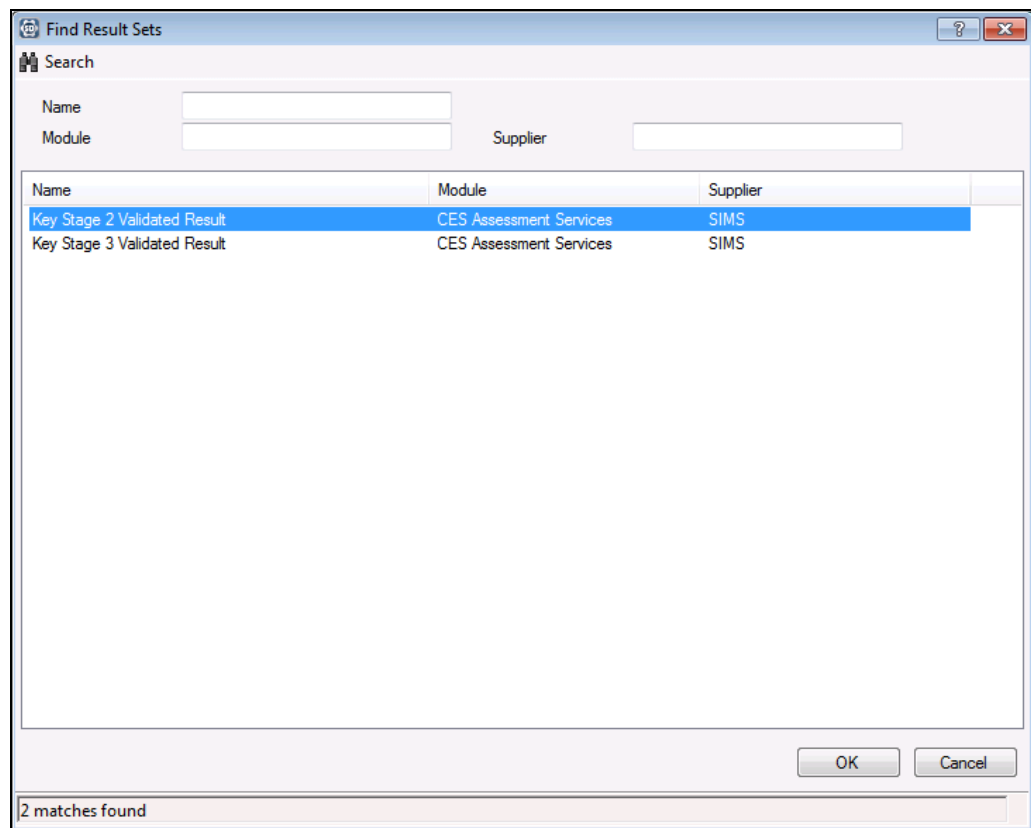
13. In the **Right Series** panel, click the **Browser** button adjacent to the Aspect field to display the **Find Aspects** dialog.

14. Select the required aspect, please repeat Steps 8-10 above.

Beneath the **Aspect** name, the **Column Heading** is populated automatically when the Aspect is selected.

The **Legend** field is populated automatically from the selected Aspect name. This will be the name of the data item that is displayed on the x axis of the graph when it is compiled on the Discover canvas. This name can be amended, if required.

15. In the **Result Set** panel, click the **Browser** button to display the **Find Result Sets** dialog. Only one result set can be selected.



16. Enter the **Name** of the result set.
17. Alternatively, enter the **Module** name or the **Supplier** name before clicking the **Search** button.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services.

The **Supplier** field displays the establishment that created the result set, e.g. your LA or someone in your own school.

The dialog is populated with a list of result sets that match the search criteria entered.

It is possible to leave all of the search fields blank before clicking the **Search** button to display a list of all available result sets, if details of a specific result set are not known.

18. Select the required result set and click the **OK** button.
19. Click the **OK** button on the **Add/Edit Assessment Graph** dialog to save the Assessment graph definition.

Add/Edit Assessment Graph

Basic Details

Name: Copy of KS2 Level 5+ for Teacher Assessments

Description: Pupils achieving L5+ in Reading, Writing and Mathematics a

Topic Fragment: KS2 TA

Style: Venn Diagram

Pastoral Group Type: National Curriculum Year

Pastoral Group: Curriculum Year 7

Venn Diagram Specific Details

Grade Set: Discover Boolean Result

Left Series

Aspect: Discover KS2 TA L5+ Writing

KS2 TA L5+ Writing

Legend: Writing L5+

Right Series

Aspect: Discover KS2 TA L5+ Reading

KS2 TA L5+ Reading

Legend: Reading L5+

Top Series ☒ (optional)

Aspect: Discover KS2 TA L5+ Mathematics

KS2 TA L5+ Mathematics

Legend: Mathematics L5+

Result Set: Key Stage 2 Validated Result

OK Cancel

20. Click the **Save** button on the **Assessment Graphs** page of the **Discover SIMS Configuration** utility.



IMPORTANT NOTE: It is suggested that you click the **Transfer** button when you have made any changes in the **Discover SIMS Configuration** utility as this ensures that the changes are made straightaway. However, please ensure that this action will not affect other users of SIMS and Discover before proceeding.

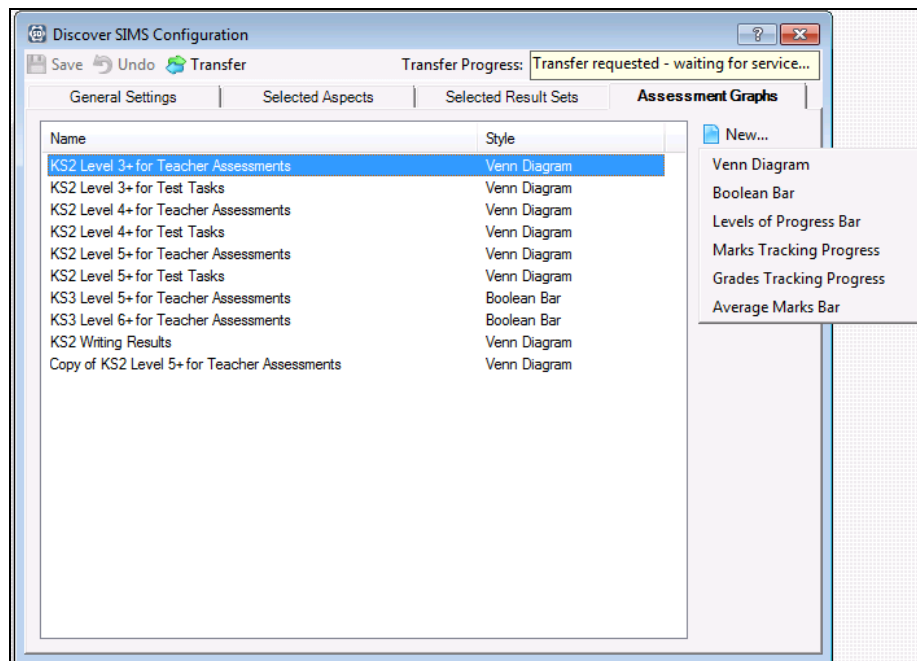
The graph definition is now available in the drop-down list from the **Assessment** button on the **Discover Application Bar**.



Assessment button

Creating a New Assessment Graph Definition

To create a brand new Assessment Graph definition, click the **New** button on the **Assessment Graphs** page and select the relevant **Style** of graph from the drop-down list.



The example in the previous section *Copying an Existing Assessment Graph Definition* on page 81, details the information that is required to copy or create a new graph of the **Venn Diagram Style**.

Please refer to the relevant section to view the appropriate **Add/Edit Assessment Graph** dialog for the style of graph that you are creating. The fields on this dialog vary depending on the **Style** of the graph definition that you are creating or copying (once created).



More Information:

Adding/Editing an Assessment Graph of Boolean Bar Style on page 89

Adding/Editing an Assessment Graph of Levels of Progress Style on page 97

Adding/Editing an Assessment Graph of Marks Tracking Progress Style on page 105

Adding/Editing an Assessment Graph of Grades Tracking Progress Style on page 116

Adding/Editing an Assessment Graph of Average Marks Bar Style on page 125

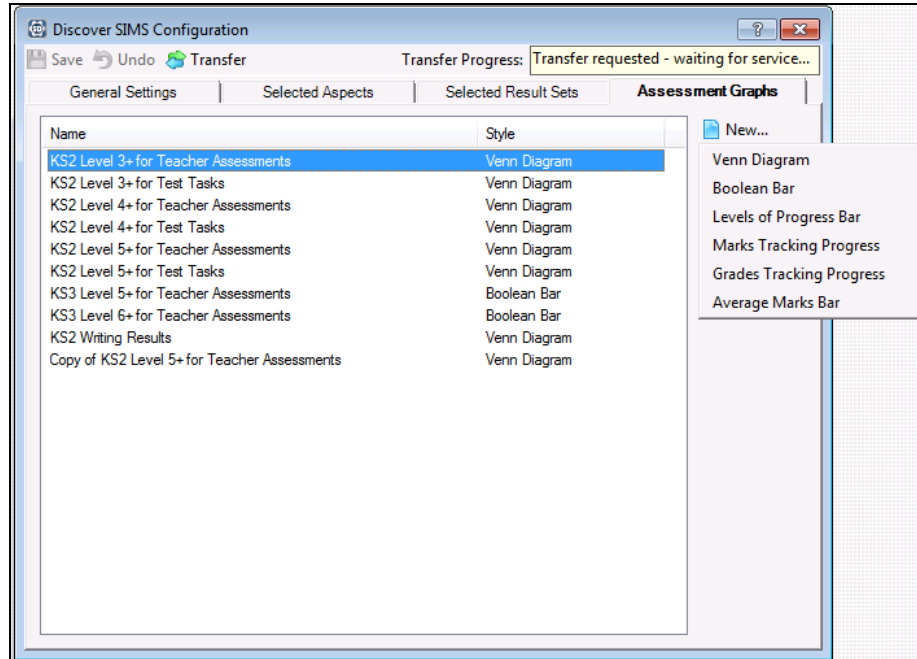
The following table details the types of aspects that can be incorporated into each **Style** of Assessment graph in Discover.

Style of Graph	Grade	Marks (Integer)	Marks (Decimal)	Age	Comment	Discover Aspect
Venn Diagram	x	x	x	x	x	✓
Boolean Bar	x	x	x	x	x	✓
Levels of Progress Bar	✓	x	x	x	x	✓
Marks Tracking Progress	x	✓	✓	x	x	x
Grades Tracking Progress	✓	x	x	x	x	x
Average Marks Bar	x	✓	✓	x	x	✓

Adding /Editing an Assessment Graph of Boolean Bar Style

When copying an existing Assessment graph definition to use it as the basis for a new graph definition, the majority of the fields can be changed to reflect your new selections.

1. Select **Boolean Bar** from the **New** button to display the **Add /Edit Assessment Graph** dialog.



2. In the **Basic Details** panel, enter a unique **Name** for the new graph definition.

The screenshot shows the 'Add/Edit Assessment Graph' window. The 'Basic Details' section has the following fields: 'Name' (empty), 'Description' (empty), 'Topic Fragment' (empty), 'Style' (Boolean Bar), 'Pastoral Group Type' (National Curriculum Year), and 'Pastoral Group' (empty). The 'Boolean Bar Specific Details' section has 'Grade Set' (Discover Boolean Result) and an 'Aspects' table with columns 'Name', 'Column Heading', and 'Legend'. To the right of the table are buttons: '+ Add', 'Open', 'Remove', 'Move Up', and 'Move Down'. Below the table are 'Result Set' (empty), 'Show True Series' (checked), 'Show False Series' (unchecked), and 'Default View Mode' (Bar Graph). 'OK' and 'Cancel' buttons are at the bottom right.

3. Enter a meaningful **Description** that enables you to differentiate this Assessment graph from other, existing graph definitions.
4. Enter a **Topic Fragment**. This is merely a short abbreviation of the Description and can be based on the Key Stage, Year Group or other cohort of pupil/students that the graph definition is based on.

The **Style** field is populated automatically with the type of graph that you have chosen to define and cannot be changed.

The **Pastoral Group Type** field defaults to National Curriculum Year but this can be changed by selecting an alternative cohort of pupil/students from the drop-down list.

5. Select the **Pastoral Group** from the drop-down list. This list is restricted by the cohort selection made in the **Pastoral Group Type** field, e.g. if National Curriculum Year is selected as the Pastoral Group Type, you can only select the pastoral group from a list of National Curriculum Years.

In the **Boolean Bar Specific Details** panel, the **Grade Set** defaults to **Discover Boolean Result** and this cannot be changed.

6. Click the **Add** button to display the **Find Aspects** dialog. At least one aspect must be selected and the maximum number is 25.

Name	Column Heading	Type	Grade Set
Discover KS2 TA L3+ Mathematics	KS2 TA L3+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TA L3+ Reading	KS2 TA L3+ Reading	Grade	Discover Boolean Result
Discover KS2 TA L3+ Writing	KS2 TA L3+ Writing	Grade	Discover Boolean Result
Discover KS2 TA L4+ Mathematics	KS2 TA L4+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TA L4+ Reading	KS2 TA L4+ Reading	Grade	Discover Boolean Result
Discover KS2 TA L4+ Writing	KS2 TA L4+ Writing	Grade	Discover Boolean Result
Discover KS2 TA L5+ Mathematics	KS2 TA L5+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TA L5+ Reading	KS2 TA L5+ Reading	Grade	Discover Boolean Result
Discover KS2 TA L5+ Writing	KS2 TA L5+ Writing	Grade	Discover Boolean Result
Discover KS2 TT L3+ Mathematics	KS2 TT L3+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TT L3+ Reading	KS2 TT L3+ Reading	Grade	Discover Boolean Result
Discover KS2 TT L3+ Writing	KS2 TT L3+ Writing	Grade	Discover Boolean Result
Discover KS2 TT L4+ Mathematics	KS2 TT L4+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TT L4+ Reading	KS2 TT L4+ Reading	Grade	Discover Boolean Result
Discover KS2 TT L4+ Writing	KS2 TT L4+ Writing	Grade	Discover Boolean Result
Discover KS2 TT L5+ Mathematics	KS2 TT L5+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TT L5+ Reading	KS2 TT L5+ Reading	Grade	Discover Boolean Result
Discover KS2 TT L5+ Writing	KS2 TT L5+ Writing	Grade	Discover Boolean Result
Discover KS3 TA L5+ English	KS3 TA L5+ English	Grade	Discover Boolean Result

7. Enter the **Name** or the **Column Heading** of the aspect that you are looking for.
8. Alternatively, enter the **Module** or the **Supplier** name, if known.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services, CES Discover Services.

The **Supplier** field displays the establishment that created the aspect, e.g. your LA or someone in your own school.

9. Select the appropriate **Type** from the drop-down list. The **Grade Set** name cannot be changed.
10. Click the **Search** button.

The dialog is populated with a list of aspects that match the search criteria entered.

It is possible to leave all of the search fields blank before clicking the **Search** button to display a list of all available aspects, if details of a specific aspect are not known. Multiple aspects can be selected in a block using the Shift key. Multiple aspects that are spaced throughout the list can be selected collectively using the Ctrl key.

11. Select the required aspect and click the **OK** button to select it.
12. In the **Add/Edit Assessment Graph** dialog, highlight an aspect name and click the **Open** button to display the **Edit Selected Aspect** dialog.

Edit Selected Aspect

Basic Details

Name: Key Stage 3 Teacher Assessments

Column Heading: Key Stage 3 Teacher Asses

Legend: Key Stage 3 Teacher Asses

OK Cancel

13. Edit the **Legend**, if required. This will be the name of the data item that is displayed on the x axis of the graph when it is compiled on the Discover canvas. This name can be amended, if required.
14. Click the **OK** button to return to the **Add/Edit Assessment Graph** dialog.

Add/Edit Assessment Graph

Basic Details

Name: Key Stage 2 Pupils Achieving L4+ Maths, Reading and Writin

Description: KS2 L4+

Topic Fragment: KS2 L4+

Style: Boolean Bar

Pastoral Group Type: National Curriculum Year

Pastoral Group: Curriculum Year 7

Boolean Bar Specific Details

Grade Set: Discover Boolean Result

Aspects

Name	Column Heading	Legend
Discover KS2 TA...	KS2 TA L4+ Ma...	KS2 TA L4+ Ma...
Discover KS2 TA...	KS2 TA L4+ Re...	KS2 TA L4+ Re...
Discover KS2 TA...	KS2 TA L4+ Wri...	KS2 TA L4+ Wri...

Result Set: Key Stage 2 Validated Result

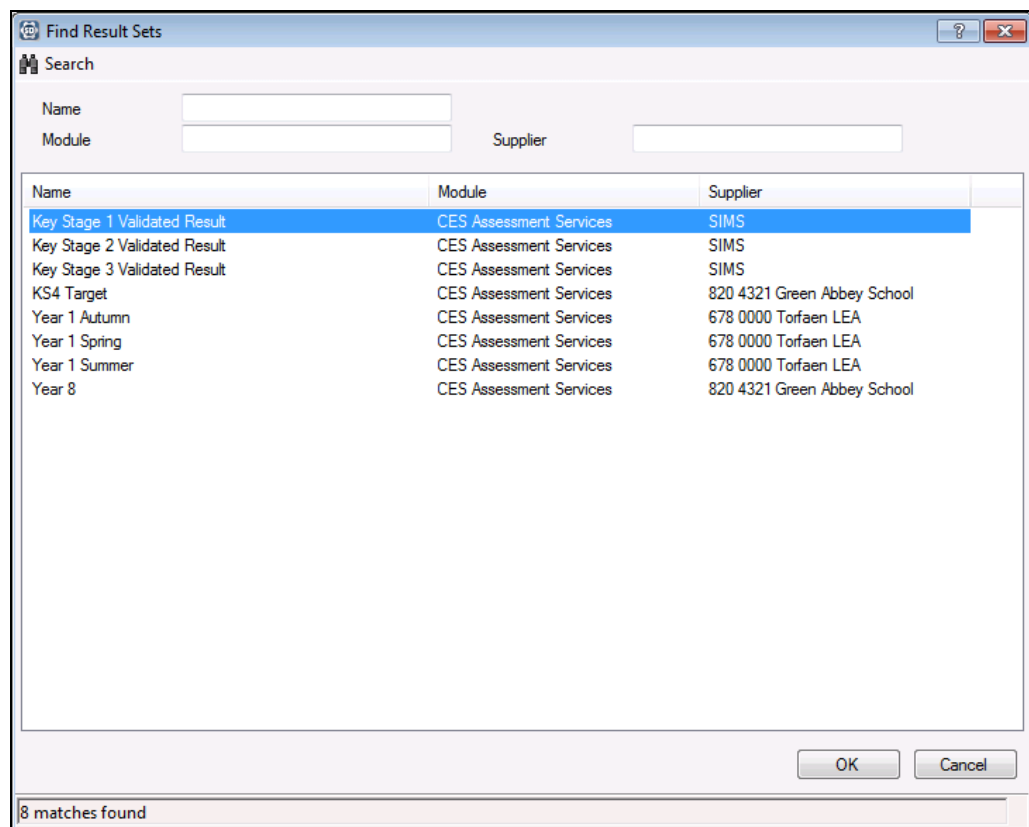
Show True Series: ☒

Show False Series: ☒

Default View Mode: Bar Graph

OK Cancel

15. If you have inadvertently added the wrong aspect, highlight an aspect **Name** and click the **Remove** button to delete the aspect from the list of those available for selection.
16. Continue adding aspects until you have selected all those that you require.
17. Highlight an aspect and click the **Move Up** or **Move Down** button to re-arrange the display order of the aspects that you have selected.
18. In the **Result Set** panel, click the **Browser** button to display the **Find Result Sets** dialog.



19. Enter the **Name** of the result set.
20. Alternatively, enter the **Module** name or the **Supplier** name before clicking the **Search** button.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services, CES Discover Services, etc.

The **Supplier** field displays the establishment that created the result set, e.g. your LA or someone in your own school.

The dialog is populated with a list of result sets that match the search criteria entered.

It is possible to leave all of the search fields blank before clicking the **Search** button to display a list of all available result sets, if details of a specific result set are not known.

21. Select the required result set and click the **OK** button to return to the **Add/Edit Assessment Graph** dialog.

Add/Edit Assessment Graph

Basic Details

Name: Key Stage 2 Pupils Achieving L4+ Maths, Reading and Writing

Description: KS2 L4+

Topic Fragment: KS2 L4+

Style: Boolean Bar

Pastoral Group Type: National Curriculum Year

Pastoral Group: Curriculum Year 7

Boolean Bar Specific Details

Grade Set: Discover Boolean Result

Aspects

Name	Column Heading	Legend
Discover KS2 TA...	KS2 TA L4+ Ma...	KS2 TA L4+ Ma...
Discover KS2 TA...	KS2 TA L4+ Re...	KS2 TA L4+ Re...
Discover KS2 TA...	KS2 TA L4+ Wri...	KS2 TA L4+ Wri...

Buttons: Add, Open, Remove, Move Up, Move Down

Result Set: Key Stage 2 Validated Result

Show True Series: ☒

Show False Series: ☒

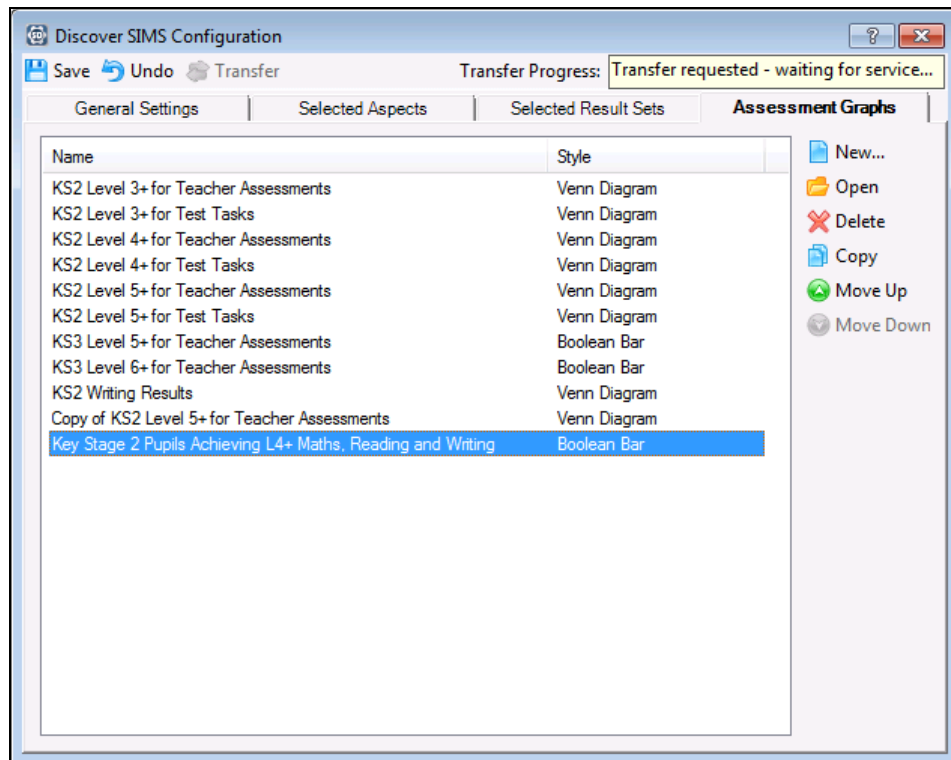
Default View Mode: Bar Graph

OK Cancel

The **Show True Series** check box is selected by default. This can be deselected if required and the **Show False Series** check box selected instead. It is possible to select both the check boxes so that the results for both true and false are displayed in the subsequent graph, if required.

The **Default View Mode** is set to **Bar Graph**, by default and this cannot be changed.

22. Click the **OK** button to save the Assessment graph definition.



The new graph definition is listed in the **Assessment Graphs** page.

23. Click the **Save** button on the **Discover SIMS Configuration** utility to save the graph definition.

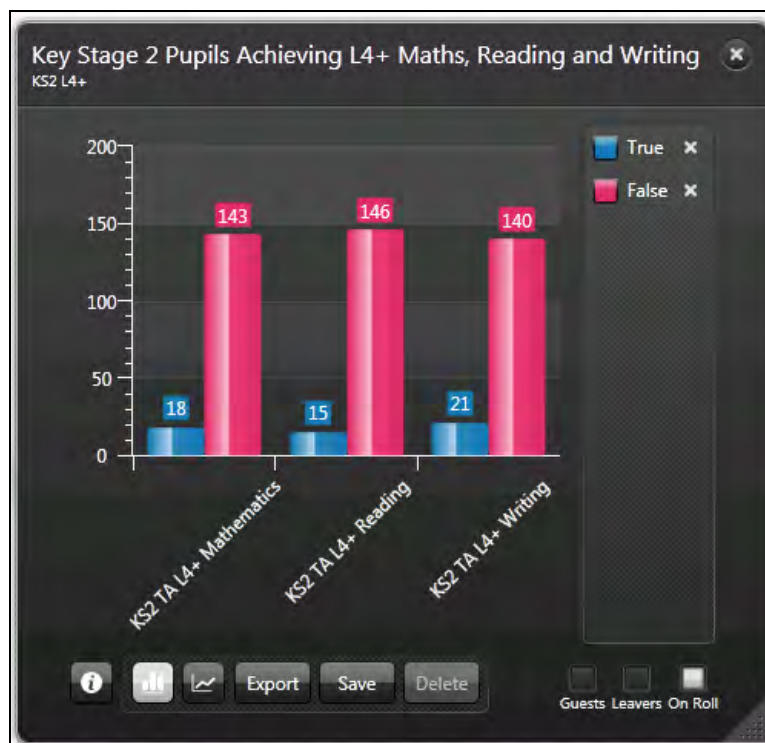


IMPORTANT NOTE: It is suggested that you click the **Transfer** button when you have made any changes in the **Discover SIMS Configuration** utility as this ensures that the changes are made straightaway. However, please ensure that this action will not affect other users of SIMS and Discover before proceeding.

The graph definition is now available in the drop-down list from the **Assessment** button on the **Discover Application Bar**.



Assessment button



Adding /Editing an Assessment Graph of Levels of Progress Style

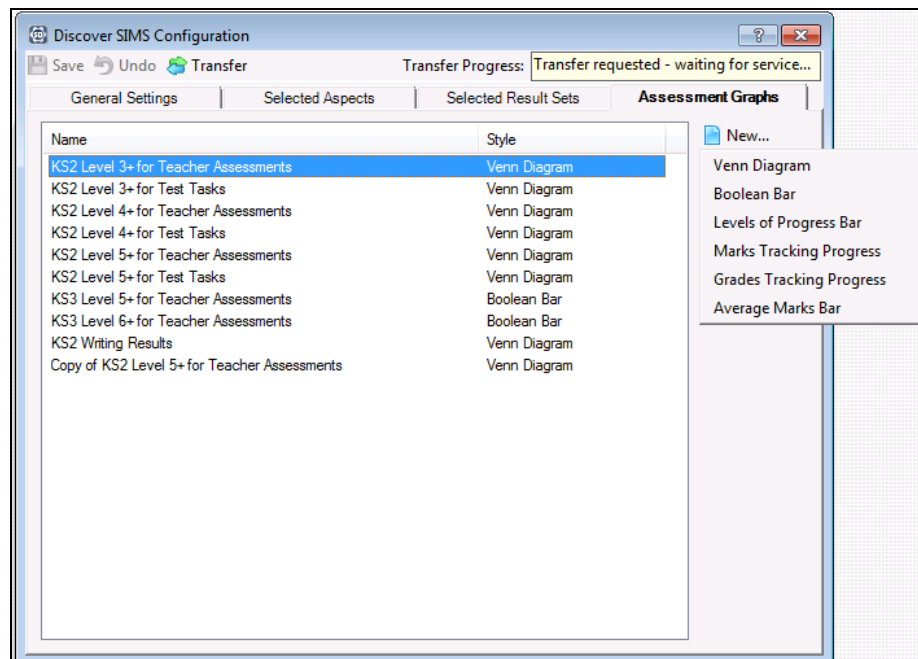
It is essential that a Discover aspect of **Mode** type **Amount of Progress** has been created in SIMS and that the results for this aspect have been generated and transferred into Discover before you begin.

When copying an existing Assessment graph definition to use it as the basis for a new graph definition, the majority of the fields can be changed to reflect your new selections.



More Information:

Creating an Amount of Progress Discover Aspect on page 56



1. Select **Levels of Progress Bar** from the **New** button to display the **Add/Edit Assessment Graph** dialog.

The screenshot shows the 'Add/Edit Assessment Graph' dialog box. It is divided into two main sections: 'Basic Details' and 'Levels of Progress Bar Specific Details'.
 In the 'Basic Details' section, there are input fields for 'Name', 'Description', and 'Topic Fragment'. The 'Style' field is set to 'Levels of Progress Bar'. The 'Pastoral Group Type' is a dropdown menu currently showing 'National Curriculum Year'. The 'Pastoral Group' is another dropdown menu.
 The 'Levels of Progress Bar Specific Details' section contains several sub-sections:
 - 'Starting Level': Includes an 'Aspect' field with a search icon and a 'Legend' field.
 - 'Amount of Progress': Includes an 'Aspect' field with a search icon.
 - 'Result Set': Includes a field with a search icon.
 - 'Default View Mode': Set to 'Bar Graph'.
 At the bottom right, there are 'OK' and 'Cancel' buttons.

2. In the **Basic Details** panel, enter a unique **Name** for the new graph definition.
3. Enter a meaningful **Description** that enables you to differentiate this Assessment graph from other, existing graph definitions.
4. Enter a **Topic Fragment**. This is merely a short abbreviation of the Description and can be based on the Key Stage, Year Group or other cohort of pupil/students that the graph definition is based on.

The **Style** field is populated automatically with the type of graph that you have chosen to define and cannot be changed.

The **Pastoral Group Type** field defaults to National Curriculum year but this can be changed by selecting an alternative cohort of pupil/students from the drop-down list.

5. Select the **Pastoral Group** from the drop-down list. This list is restricted by the cohort selection made in the **Pastoral Group Type** field, e.g. if National Curriculum Year is selected as the Pastoral Group Type, you can only select the pastoral group from a list of National Curriculum Years.

6. In the **Levels of Progress Bar Specific Details** panel, click the **Browser** button to display the **Find Aspects** dialog and specify the pupil/student's **Starting Level**.

Name	Column Heading	Type	Grade Set
*English KS3 Predicted Level	*English KS3 Predicted Le	Grade	KS3 Sub Levels (GA) 1
MA KS2: Maths Test Lev	Maths Test Level KS2	Grade	KS2 Sub Levels

7. Enter the **Name** or the **Column Heading** of the aspect that you are looking for.
8. Alternatively, enter the **Module** or the **Supplier** name, if known.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services, CES Discover Services, etc.

The **Supplier** field displays the establishment that created the aspect, e.g. your LA or someone in your own school.

9. The **Type** field cannot be changed.



NOTE: Delete the default entry in the **Grade Set** field in the **Find Aspects** dialog to view all available aspects before searching.

It is possible to leave all of the search fields blank before clicking the **Search** button to display a list of all available aspects, if details of a specific aspect are not known.

10. Select the required aspect and click the **OK** button to select it.

In the **Starting Level** panel, beneath the **Aspect** name, the column heading field is populated automatically when the Aspect is selected.

Add/Edit Assessment Graph

Basic Details

Name: KS2-KS3 Progress in Maths

Description: KS2-KS3 Progress in Maths

Topic Fragment: KS2-KS3 Pr

Style: Levels of Progress Bar

Pastoral Group Type: National Curriculum Year

Pastoral Group: Curriculum Year 8

Levels of Progress Bar Specific Details

Starting Level

Aspect: MA KS2: Maths Test Lev

Legend: Maths Test Level KS2

Amount of Progress

Aspect: KS2-KS3 Progress Maths

Result Set: Key Stage 2 Validated Result

Default View Mode: Bar Graph

OK Cancel

The **Legend** field is populated automatically from the selected Aspect name. This will be the name of the data item that is displayed on the x axis of the graph when it is compiled on the Discover canvas. This name can be amended, if required.

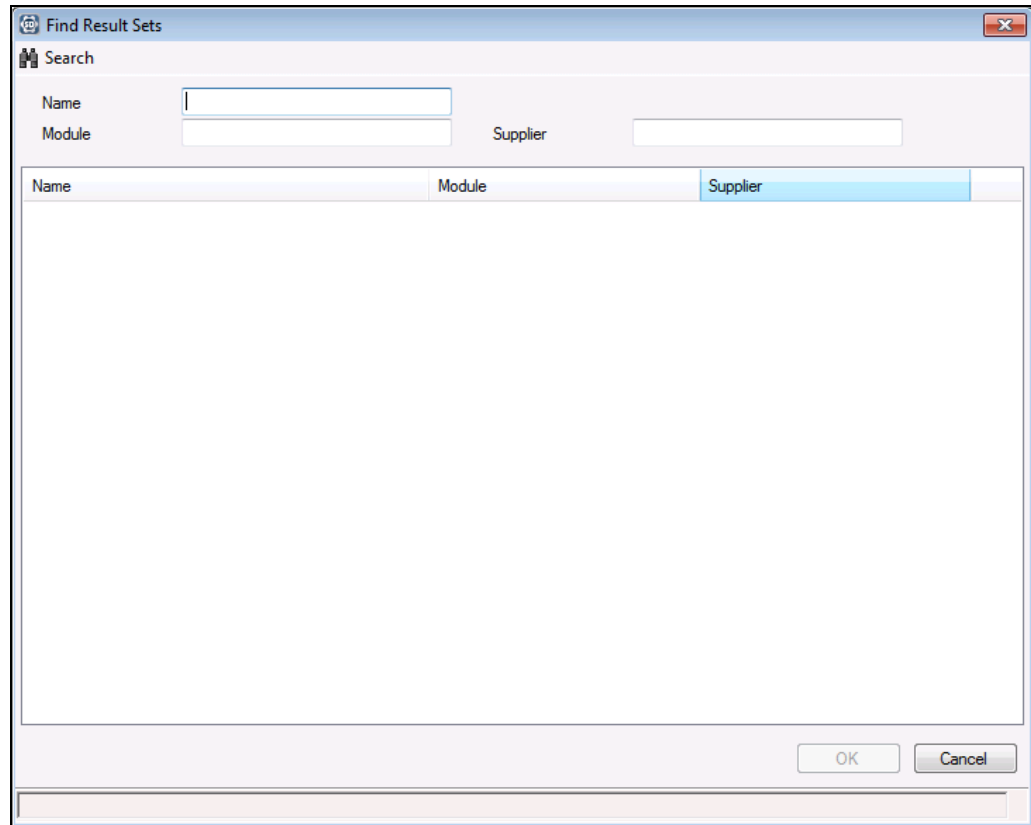
11. In the **Amount of Progress** panel, click the **Browser** button to display the **Find Aspects** dialog.

Name	Column Heading	Type	Grade Set
Key Stage 3 English Predicted and Actual	Key Stage 3 English	Grade	Discover Amount of Progress Result
KS2-KS3 Progress Maths	KS2-KS3 Progress Maths	Grade	Discover Amount of Progress Result

2 matches found

Only aspects with a **Grade Set** of **Discover Amount of Progress Results** are available for selection. This indicates how much progress has been made from the original starting level. Please repeat Steps 7-10.

12. In the **Result Set** panel, click the **Browser** button to display the **Find Result Sets** dialog. Only one result set can be selected.



The image shows a Windows-style dialog box titled "Find Result Sets". It has a "Search" icon and label at the top left. Below this, there are three input fields: "Name", "Module", and "Supplier". The "Name" field is currently active with a cursor. Below the input fields is a table with three columns: "Name", "Module", and "Supplier". The table is currently empty. At the bottom right of the dialog are "OK" and "Cancel" buttons.

Name	Module	Supplier
------	--------	----------

13. Enter the **Name** of the result set.
14. Alternatively, enter the **Module** name or the **Supplier** name before clicking the **Search** button.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services, CES Discover Services, etc.

The **Supplier** field displays the establishment that created the result set, e.g. your LA or someone from your own school.

The dialog is populated with a list of result sets that match the search criteria entered.

It is possible to leave all of the search fields blank before clicking the **Search** button to display a list of all available result sets, if details of a specific result set are not known.

15. Select the required result set and click the **OK** button to return to the **Add/Edit Assessment Graph** dialog.

Add/Edit Assessment Graph

Basic Details

Name: KS2-KS3 Progress in Maths

Description: KS2-KS3 Progress in Maths

Topic Fragment: KS2-KS3 Pr

Style: Levels of Progress Bar

Pastoral Group Type: National Curriculum Year

Pastoral Group: Curriculum Year 8

Levels of Progress Bar Specific Details

Starting Level

Aspect: MA KS2: Maths Test Lev

Legend: Maths Test Level KS2

Amount of Progress

Aspect: KS2-KS3 Progress Maths

Legend: KS2-KS3 Progress Maths

Result Set: Key Stage 2 Validated Result

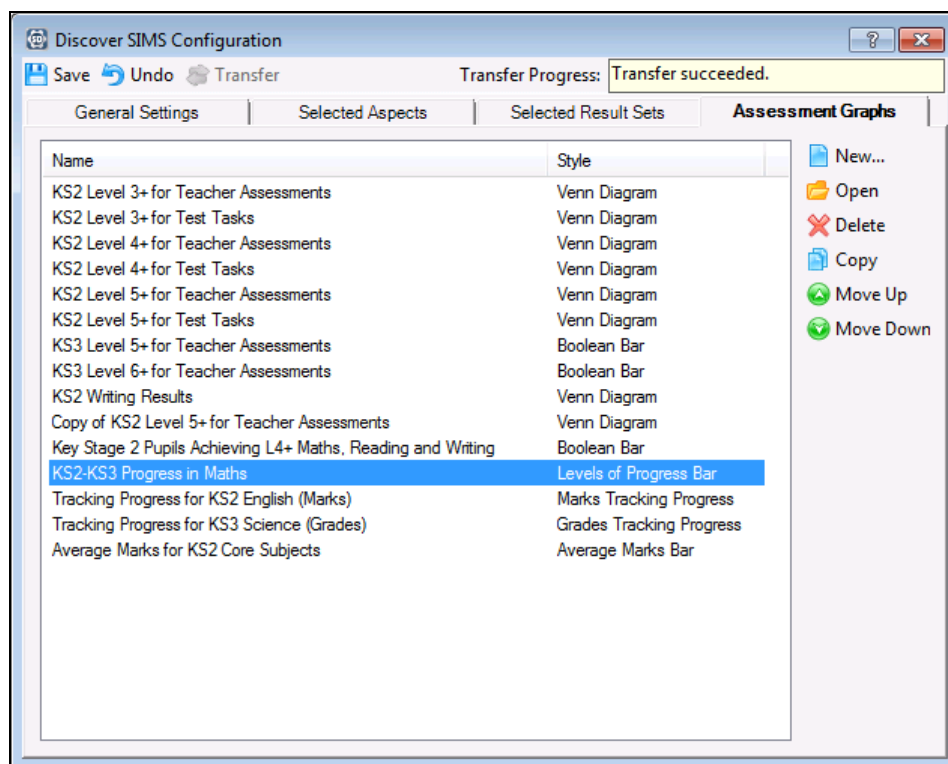
Default View Mode: Bar Graph

OK Cancel

The **Default View Mode** is set to **Bar Graph** and this cannot be changed.

16. Click the **OK** button to save the Assessment graph definition.

The new graph definition is listed in the **Assessments Graph** page.



17. Click the **Save** button on the **Discover SIMS Configuration** utility to save the graph definition.

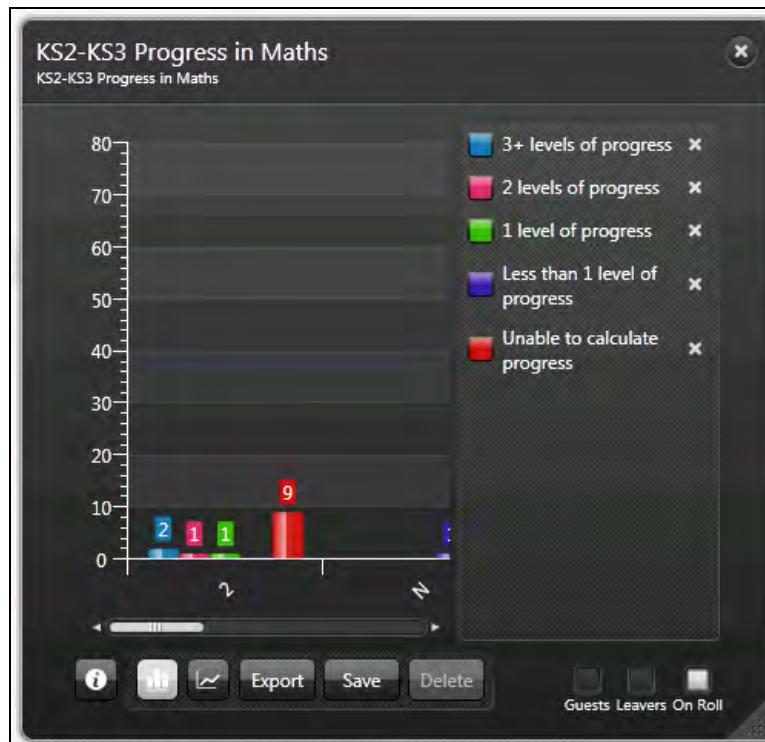


IMPORTANT NOTE: It is suggested that you click the **Transfer** button when you have made any changes in the **Discover SIMS Configuration** utility as this ensures that the changes are made straightaway. However, please ensure that this action will not affect other users of SIMS and Discover before proceeding.

The graph definition is now available in the drop-down list from the **Assessment** button on the **Discover Application Bar**.



Assessment button

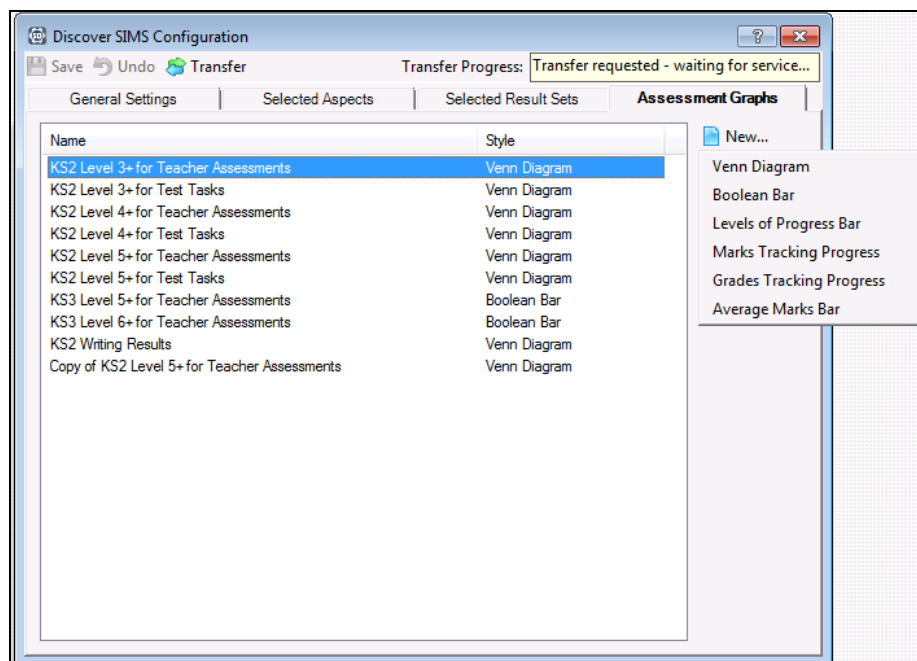


Adding / Editing an Assessment Graph of Marks Tracking Progress Style

It is essential that at least one Assessment definition is present in the SIMS database and that this has been transferred into Discover before you begin.

When copying an existing Assessment graph definition to use it as the basis for a new graph definition, the majority of the fields can be changed to reflect your new selections.

1. Select **Marks Tracking Progress** from the **New** button to display the **Add/Edit Assessment Graph** dialog.



2. In the **Basic Details** panel, enter a unique **Name** for the new graph definition.

The screenshot shows the 'Add/Edit Assessment Graph' window. The 'Basic Details' section has the following fields:

- Name:** A text input field.
- Description:** A text input field.
- Topic Fragment:** A text input field.
- Style:** A dropdown menu with 'Marks Tracking Progress' selected.
- Pastoral Group Type:** A dropdown menu with 'National Curriculum Year' selected.
- Pastoral Group:** A dropdown menu.

The 'Marks Tracking Progress Specific Details' section contains two tables:

- Aspects:** A table with columns 'Name', 'Column Heading', and 'Legend'. To its right are buttons: '+ Add', 'Open', 'Remove', 'Move Up', and 'Move Down'.
- Result Sets:** A table with columns 'Name' and 'Legend'. To its right are buttons: '+ Add', 'Open', 'Remove', 'Move Up', and 'Move Down'.

At the bottom, there is a 'Default View Mode' dropdown set to 'Line Graph' and 'OK' and 'Cancel' buttons.

3. Enter a meaningful **Description** that enables you to differentiate this Assessment graph from other, existing graph definitions.
4. Enter a **Topic Fragment**. This is merely a short abbreviation of the Description and can be based on the Key Stage, Year Group or other cohort of pupil/students that the graph definition is based on.

The **Style** field is populated automatically with the type of graph that you have chosen to define and cannot be changed.

The **Pastoral Group Type** field defaults to National Curriculum year but this can be changed by selecting an alternative cohort of pupil/students from the drop-down list.

5. Select the **Pastoral Group** from the drop-down list. This list is restricted by the cohort selection made in the **Pastoral Group Type** field, e.g. if National Curriculum Year is selected as the Pastoral Group Type, you can only select the pastoral group from a list of National Curriculum Years.
6. In the **Marks Tracking Progress Specific Details** panel, click the **Add** button to display the **Find Aspects** dialog. At least one aspect must be selected and the maximum number is 25.



IMPORTANT NOTE: If you select a Discover aspect or any other aspect that does not have a score associated with the value, the graph will be blank once compiled.

Name	Column Heading	Type	Grade Set
------	----------------	------	-----------

7. Enter the **Name** or the **Column Heading** of the aspect that you are looking for.
8. Alternatively, enter the **Module** or the **Supplier** name, if known.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services, CES Discover Services.

The **Supplier** field displays the establishment that created the aspect, e.g. your LA or someone in your own school.

9. Select the appropriate **Type** from the drop-down list or enter the **Grade Set** name before clicking the **Search** button.

The dialog is populated with a list of aspects that match the search criteria entered.

It is possible to leave all of the search fields blank before clicking the **Search** button to display a list of all available aspects, if details of a specific aspect are not known.

Multiple aspects can be selected in a block using the Shift key. Multiple aspects that are spaced throughout the list can be selected collectively using the Ctrl key.

10. Select the required aspect and click the **OK** button to select it. Continue adding aspects, as required. Please repeat Steps 6-10.
11. In the **Add/Edit Assessment Graph** dialog, highlight an aspect name and click the **Open** button to display the **Edit Selected Aspect** dialog.

The screenshot shows the 'Edit Selected Aspect' dialog box. It has a title bar with a question mark icon and a close button. The dialog is divided into a 'Basic Details' section with three text input fields: 'Name' (containing 'SC TA: Science Subject Level KS3'), 'Column Heading' (containing 'SC TA Science Subject KS3'), and 'Legend' (containing 'SC TA Science Subject KS3'). At the bottom right are 'OK' and 'Cancel' buttons.

12. Edit the **Legend**, if required. This will be the name of the data item that is displayed on the x axis of the graph when it is compiled on the Discover canvas. This name can be amended, if required.

13. Click the **OK** button to return to the **Add/Edit Assessment Graph** dialog.

If you have made a mistake when selecting aspects, highlight the incorrect aspect name and click the **Remove** button to delete the aspect from the list of those available for inclusion in the graph.

Where multiple aspects have been selected, highlight an aspect and click the **Move Up** or **Move Down** button to re-arrange the order of the aspects that you have selected.

Add/Edit Assessment Graph

Basic Details

Name: Tracking Progress for KS3 Science (Grades)
 Description: Tracking Progress for KS3 Science (Grades)
 Topic Fragment: Tracking P
 Style: Grades Tracking Progress
 Pastoral Group Type: National Curriculum Year
 Pastoral Group: Curriculum Year 9

Grades Tracking Progress Specific Details

Aspects

Name	Column Heading	Legend
SC TA: Science ...	SC TA Science ...	SC TA Science ...

Buttons: Add, Open, Remove, Move Up, Move Down

Result Sets

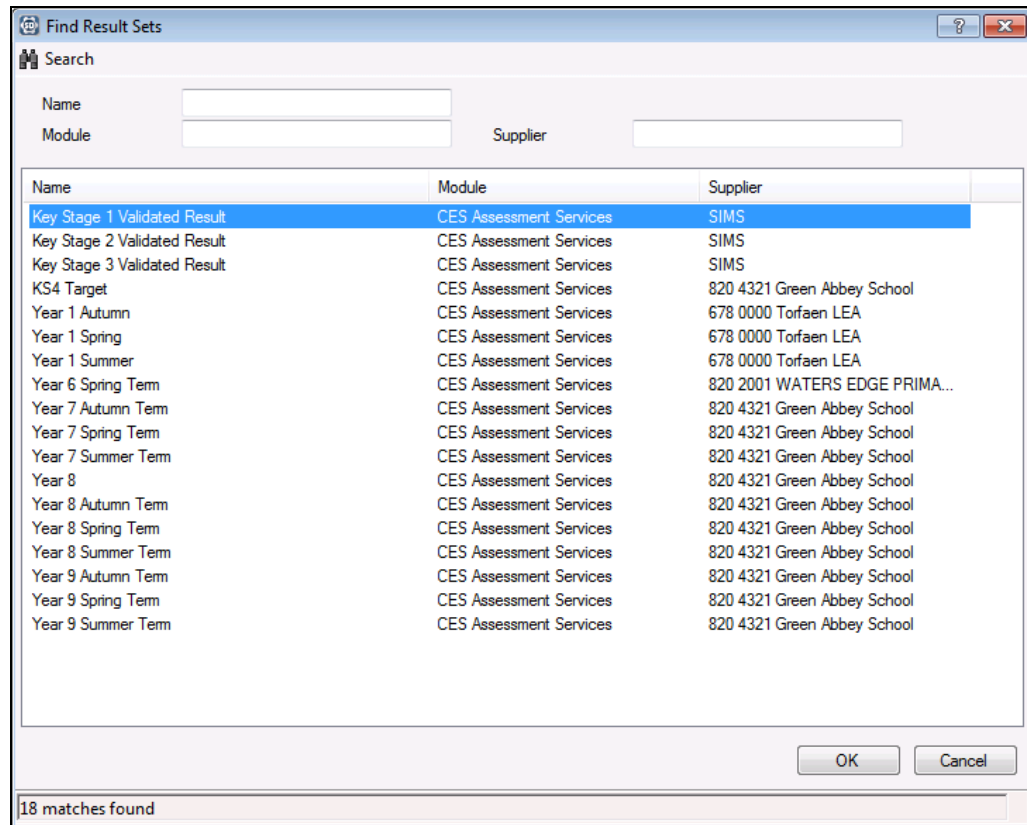
Name	Legend
Year 7 Autumn Term	Year 7 Autumn ...
Year 7 Spring Term	Year 7 Spring T...
Year 7 Summer Term	Year 7 Summer ...
Year 8 Autumn Term	Year 8 Autumn ...
Year 8 Spring Term	Year 8 Spring T...
Year 8 Summer Term	Year 8 Summer ...
Year 9 Autumn Term	Year 9 Autumn ...
Year 9 Spring Term	Year 9 Spring T...

Buttons: Add, Open, Remove, Move Up, Move Down

Default View Mode: Line Graph

OK Cancel

14. In the **Result Sets** panel, click the **Add** button to display the **Find Result Sets** dialog. At least one result set must be selected and the maximum number is 25.



15. Enter the **Name** of the result set.
16. Alternatively, enter the **Module** name or the **Supplier** name before clicking the **Search** button.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services, CES Discover Services, etc.

The **Supplier** field displays the establishment that created the result set, e.g. your LA or someone in your own school.

The dialog is populated with a list of result sets that match the search criteria entered.

It is possible to leave all the search fields blank before clicking the **Search** button to display a list of all available result sets, if details of a specific result set are not known.

Multiple result sets can be selected in a block using the Shift key. Multiple result sets that are spaced throughout the list can be selected collectively using the Ctrl key.

17. Select the required result set and click the **OK** button to return to the **Add/Edit Assessment Graph** dialog. Continue adding all the required result sets, please repeat Steps 14-17.

Add/Edit Assessment Graph

Basic Details

Name: Tracking Progress for KS2 English (Marks)

Description: Tracking Progress for KS2 English (Marks)

Topic Fragment: Tracking P

Style: Marks Tracking Progress

Pastoral Group Type: National Curriculum Year

Pastoral Group: Curriculum Year 7

Marks Tracking Progress Specific Details

Aspects

Name	Column Heading	Legend
EN KS2: English ...	English Total M...	English Total M...

+ Add
Open
Remove
Move Up
Move Down

Result Sets

Name	Legend
Key Stage 1 Validated Result	Key Stage 1 Val...
Year 6 Spring Term	Year 6 Spring T...
Year 7 Autumn Term	Year 7 Autumn ...
Year 7 Spring Term	Year 7 Spring T...
Year 7 Summer Term	Year 7 Summer ...
Year 8 Autumn Term	Year 8 Autumn ...
Year 8 Spring Term	Year 8 Spring T...
Year 8 Summer Term	Year 8 Summer ...

+ Add
Open
Remove
Move Up
Move Down

Default View Mode: Line Graph

OK Cancel

18. You can highlight a result set name and click the **Open** button to display the **Edit Selected Result Set** dialog.

Edit Selected Result Set

Basic Details

Name: Year 8 Autumn Term

Legend: Year 8 Autumn Term

OK Cancel

19. Edit the **Legend**, if required. This will be the name of the data item that is displayed on the x axis of the graph when it is compiled on the Discover canvas. This name can be amended, if required.
20. Click the **OK** button to return to the **Add/Edit Assessment Graph** dialog.

Add/Edit Assessment Graph

Basic Details

Name: Tracking Progress for KS2 English (Marks)

Description: Tracking Progress for KS2 English (Marks)

Topic Fragment: Tracking P

Style: Marks Tracking Progress

Pastoral Group Type: National Curriculum Year

Pastoral Group: Curriculum Year 7

Marks Tracking Progress Specific Details

Aspects

Name	Column Heading	Legend
EN KS2: English ...	English Total M...	English Total M...

Result Sets

Name	Legend
Key Stage 1 Validated Result	Key Stage 1 Val...
Year 6 Spring Term	Year 6 Spring T...
Year 7 Autumn Term	Year 7 Autumn ...
Year 7 Spring Term	Year 7 Spring T...
Year 7 Summer Term	Year 7 Summer ...
Year 8 Autumn Term	Year 8 Autumn ...
Year 8 Spring Term	Year 8 Spring T...
Year 8 Summer Term	Year 8 Summer ...

Default View Mode: Line Graph

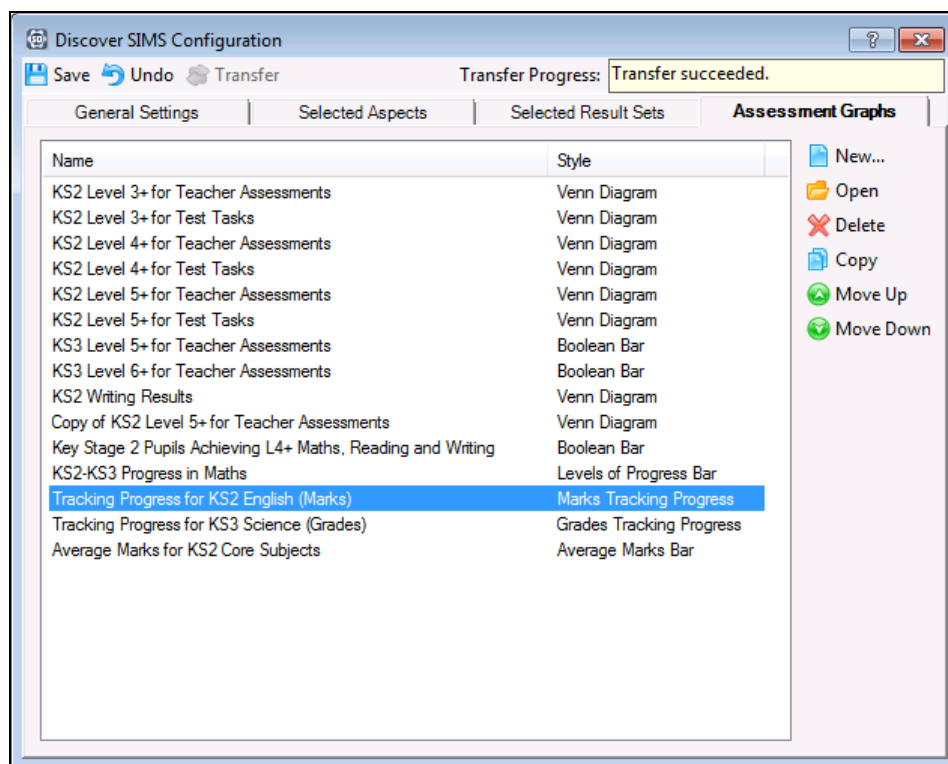
OK Cancel

If you have made a mistake when selecting result sets, highlight the incorrect result set name and click the **Remove** button to delete the result set from the list of those available for inclusion in the graph.

Where multiple result sets have been selected, highlight a result set and click the **Move Up** or **Move Down** button to re-arrange the order of the result sets that you have selected.

The **Default View Mode** can be changed to an output of your choice, if required.

21. Click the **OK** button to save the Assessment graph definition.



The new graph definition is listed in the **Assessment Graphs** page.

22. Click the **Save** button on the **Discover SIMS Configuration** utility to save the graph definition.

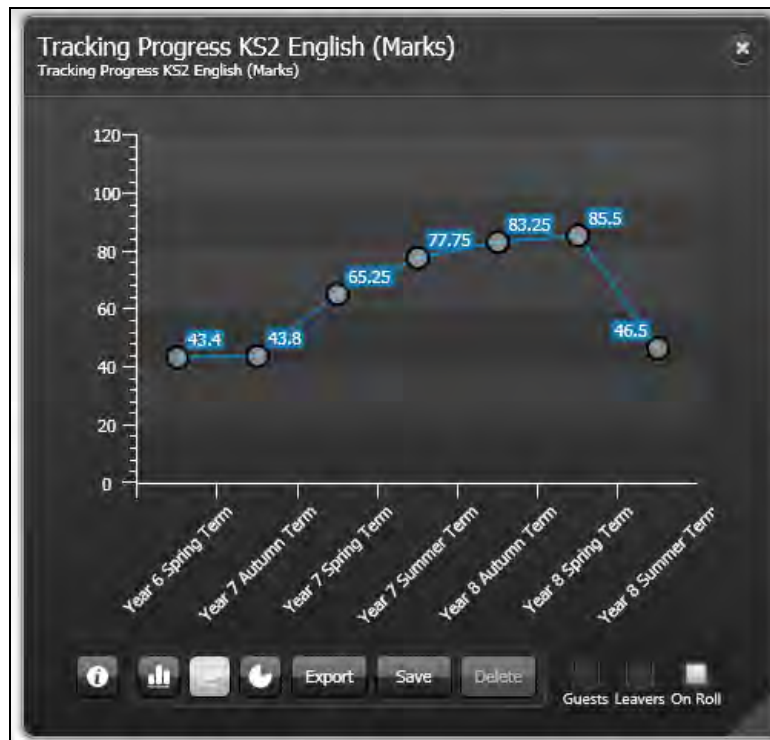


IMPORTANT NOTE: It is suggested that you click the **Transfer** button when you have made any changes in the **Discover SIMS Configuration** utility as this ensures that the changes are made straightaway. However, please ensure that this action will not affect other users of SIMS and Discover before proceeding.

The graph definition is now available in the drop-down list from the **Assessment** button on the **Discover Application Bar**.



Assessment button

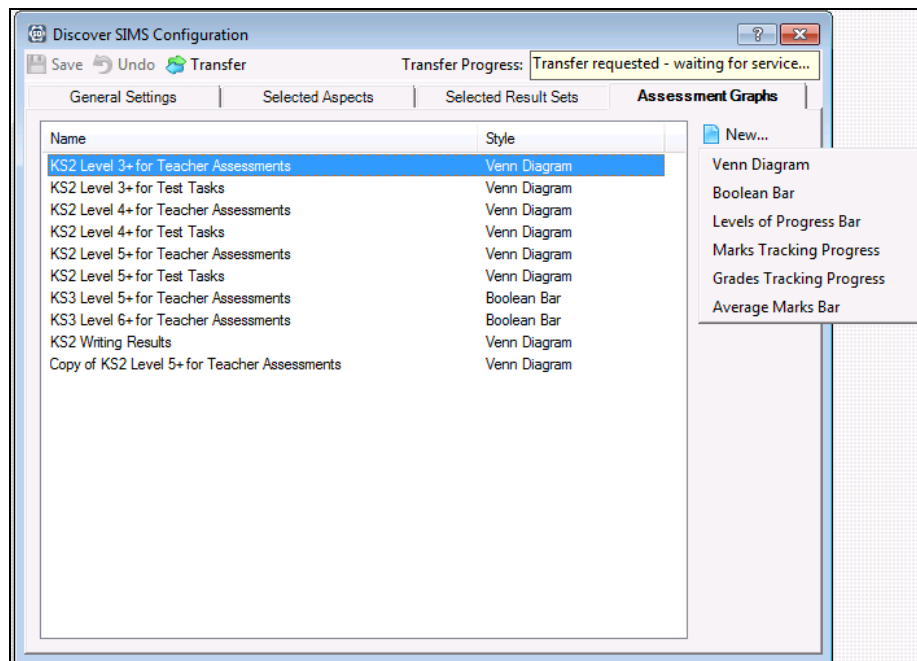


Where you have selected multiple aspects for inclusion in the **Marks Tracking Progress** graph definition, multiple lines are displayed on the compiled graph. This graphical representation is for a single aspect graph definition represented by a single line.

Adding /Editing an Assessment Graph of Grades Tracking Progress Style

It is essential that at least one Assessment definition is present in the SIMS database and that this has been transferred into Discover before you begin.

When copying an existing Assessment graph definition to use it as the basis for a new graph definition, the majority of the fields can be changed to reflect your new selections.



1. Select **Grades Tracking Progress** from the **New** button to display the **Add/Edit Assessment Graph** dialog.

Add/Edit Assessment Graph

Basic Details

Name:

Description:

Topic Fragment:

Style: Grades Tracking Progress

Pastoral Group Type: National Curriculum Year

Pastoral Group:

Grades Tracking Progress Specific Details

Aspects

Name	Column Heading	Legend

+ Add
Open
Remove
Move Up
Move Down

Result Sets

Name	Legend

+ Add
Open
Remove
Move Up
Move Down

Default View Mode: Line Graph

OK Cancel

2. In the **Basic Details** panel, enter a unique **Name** for the new graph definition.
3. Enter a meaningful **Description** that enables you to differentiate this Assessment graph from other, existing graph definitions.
4. Enter a **Topic Fragment**. This is merely a short abbreviation of the Description and can be based on the Key Stage, Year Group or other cohort of pupil/students that the graph definition is based on.

The **Style** field is populated automatically with the type of graph that you have chosen to define and cannot be changed.

The **Pastoral Group Type** field defaults to National Curriculum year but this can be changed by selecting an alternative cohort of pupil/students from the drop-down list.

5. Select the **Pastoral Group** from the drop-down list. This list is restricted by the cohort selection made in the **Pastoral Group Type** field, e.g. if National Curriculum Year is selected as the Pastoral Group Type, you can only select the pastoral group from a list of National Curriculum Years.
6. In the **Grades Tracking Progress Specific Details** panel, click the **Add** button to display the **Find Aspects** dialog. At least one aspect must be selected and the maximum number is 25.



IMPORTANT NOTE: If you select a Discover aspect or any other aspect that does not have a score associated with the value, the graph will be blank once compiled.

Name	Column Heading	Type	Grade Set
*English KS3 Predicted Level	*English KS3 Predicted Le	Grade	KS3 Sub Levels (GA) 1
Algebra Tests Year 8	Algebra Tests Year 8	Grade	Discover Boolean Result
Discover KS2 TA L3+ Mathematics	KS2 TA L3+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TA L3+ Reading	KS2 TA L3+ Reading	Grade	Discover Boolean Result
Discover KS2 TA L3+ Writing	KS2 TA L3+ Writing	Grade	Discover Boolean Result
Discover KS2 TA L4+ Mathematics	KS2 TA L4+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TA L4+ Reading	KS2 TA L4+ Reading	Grade	Discover Boolean Result
Discover KS2 TA L4+ Writing	KS2 TA L4+ Writing	Grade	Discover Boolean Result
Discover KS2 TA L5+ Mathematics	KS2 TA L5+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TA L5+ Reading	KS2 TA L5+ Reading	Grade	Discover Boolean Result
Discover KS2 TA L5+ Writing	KS2 TA L5+ Writing	Grade	Discover Boolean Result
Discover KS2 TT L3+ Mathematics	KS2 TT L3+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TT L3+ Reading	KS2 TT L3+ Reading	Grade	Discover Boolean Result
Discover KS2 TT L3+ Writing	KS2 TT L3+ Writing	Grade	Discover Boolean Result
Discover KS2 TT L4+ Mathematics	KS2 TT L4+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TT L4+ Reading	KS2 TT L4+ Reading	Grade	Discover Boolean Result
Discover KS2 TT L4+ Writing	KS2 TT L4+ Writing	Grade	Discover Boolean Result
Discover KS2 TT L5+ Mathematics	KS2 TT L5+ Mathematics	Grade	Discover Boolean Result
Discover KS2 TT L5+ Reading	KS2 TT L5+ Reading	Grade	Discover Boolean Result

7. Enter the **Name** or the **Column Heading** of the aspect that you are looking for.
8. Alternatively, enter the **Module** or the **Supplier** name, if known.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services, CES Discover Services.

The **Supplier** field displays the establishment that created the aspect, e.g. your LA or someone in your own school.

The **Type** defaults to **Grade** and cannot be changed.

9. Enter the **Grade Set** name, if known.

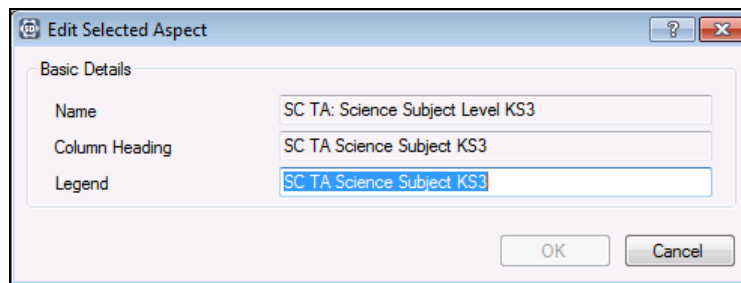
It is possible to leave all the search fields blank before clicking the **Search** button to display a list of all available aspects, if details of a specific aspect are not known.

The dialog is populated with a list of aspects that match the search criteria entered.

10. Select the required aspect and click the **OK** button to select it. Continue adding aspects, as required. Please repeat Steps 7-10.

Multiple aspects can be selected in a block using the Shift key. Multiple aspects that are spaced throughout the list can be selected collectively using the Ctrl key.

11. In the **Add/Edit Assessment Graph** dialog, highlight an aspect name and click the **Open** button to display the **Edit Selected Aspect** dialog.



The screenshot shows a Windows-style dialog box titled "Edit Selected Aspect". It has a standard title bar with a question mark icon and a close button (X). The main area is labeled "Basic Details" and contains three text input fields. The first field, labeled "Name", contains the text "SC TA: Science Subject Level KS3". The second field, labeled "Column Heading", contains "SC TA Science Subject KS3". The third field, labeled "Legend", contains "SC TA Science Subject KS3". At the bottom right of the dialog are two buttons: "OK" and "Cancel".

12. Edit the **Legend**, if required. This will be the name of the data item that is displayed on the x axis of the graph when it is compiled on the Discover canvas. This name can be amended, if required.

13. Click the **OK** button to return to the **Add /Edit Assessment Graph** dialog.

Add/Edit Assessment Graph

Basic Details

Name: Tracking Progress for KS3 Science (Grades)
 Description: Tracking Progress for KS3 Science (Grades)
 Topic Fragment: Tracking P
 Style: Grades Tracking Progress
 Pastoral Group Type: National Curriculum Year
 Pastoral Group: Curriculum Year 9

Grades Tracking Progress Specific Details

Aspects

Name	Column Heading	Legend
SC TA: Science ...	SC TA Science ...	SC TA Science ...

Buttons: Add, Open, Remove, Move Up, Move Down

Result Sets

Name	Legend
Year 7 Autumn Term	Year 7 Autumn ...
Year 7 Spring Term	Year 7 Spring T...
Year 7 Summer Term	Year 7 Summer ...
Year 8 Autumn Term	Year 8 Autumn ...
Year 8 Spring Term	Year 8 Spring T...
Year 8 Summer Term	Year 8 Summer ...
Year 9 Autumn Term	Year 9 Autumn ...
Year 9 Spring Term	Year 9 Spring T...

Buttons: Add, Open, Remove, Move Up, Move Down

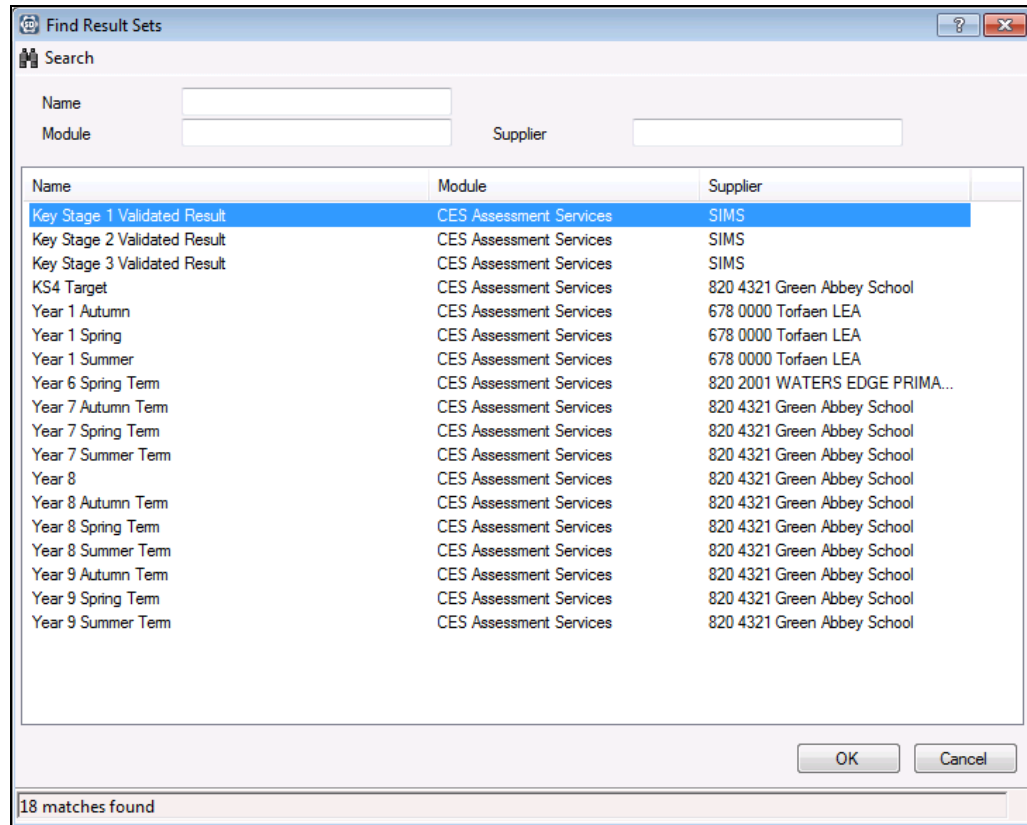
Default View Mode: Line Graph

OK Cancel

If you have made a mistake when selecting aspects, highlight the incorrect aspect name and click the **Remove** button to delete the aspect from the list of those available for inclusion in the graph.

Where multiple aspects have been selected, highlight an aspect and click the **Move Up** or **Move Down** button to re-arrange the order of the aspects that you have selected.

14. Click the **Add** button to display the **Find Result Sets** dialog. At least one result set must be selected and the maximum number is 25.



15. Enter the **Name** of the result set.
16. Alternatively, enter the **Module** name or the **Supplier** name before clicking the **Search** button.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services, CES Discover Services, etc.

The **Supplier** field displays the establishment that created the result set, e.g. your LA or someone in your own school.

The dialog is populated with a list of result sets that match the search criteria entered.

It is possible to leave all of the search fields blank before clicking the **Search** button to display a list of all available result sets, if details of a specific result set are not known.

Multiple result sets can be selected in a block using the Shift key. Multiple result sets that are spaced throughout the list can be selected collectively using the Ctrl key.

17. Select the required result set and click the **OK** button to return to the **Add/Edit Assessment Graph** dialog. Continue adding all the required result sets, please repeat Steps 14-17.

Add/Edit Assessment Graph

Basic Details

Name: Tracking Progress for KS3 Science (Grades)
 Description: Tracking Progress for KS3 Science (Grades)
 Topic Fragment: Tracking P
 Style: Grades Tracking Progress
 Pastoral Group Type: National Curriculum Year
 Pastoral Group: Curriculum Year 9

Grades Tracking Progress Specific Details

Aspects

Name	Column Heading	Legend
SC TA: Science ...	SC TA Science ...	SC TA Science ...

Result Sets

Name	Legend
Year 7 Autumn Term	Year 7 Autumn ...
Year 7 Spring Term	Year 7 Spring T...
Year 7 Summer Term	Year 7 Summer ...
Year 8 Autumn Term	Year 8 Autumn ...
Year 8 Spring Term	Year 8 Spring T...
Year 8 Summer Term	Year 8 Summer ...
Year 9 Autumn Term	Year 9 Autumn ...
Year 9 Spring Term	Year 9 Spring T...

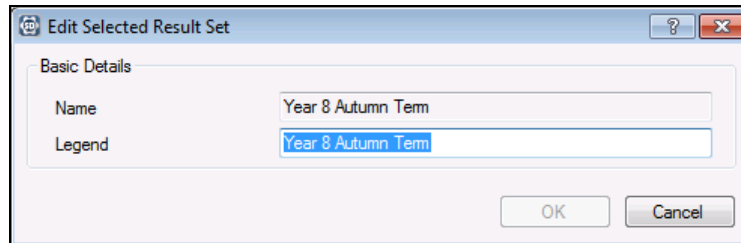
Default View Mode: Line Graph

Buttons: OK, Cancel

If you have made a mistake when selecting result sets, highlight the incorrect result set name and click the **Remove** button to delete the result set from the list of those available for inclusion in the graph.

Where multiple result sets have been selected, highlight a result set and use the **Move Up** or **Move Down** button to re-arrange the order of the result sets that you have selected.

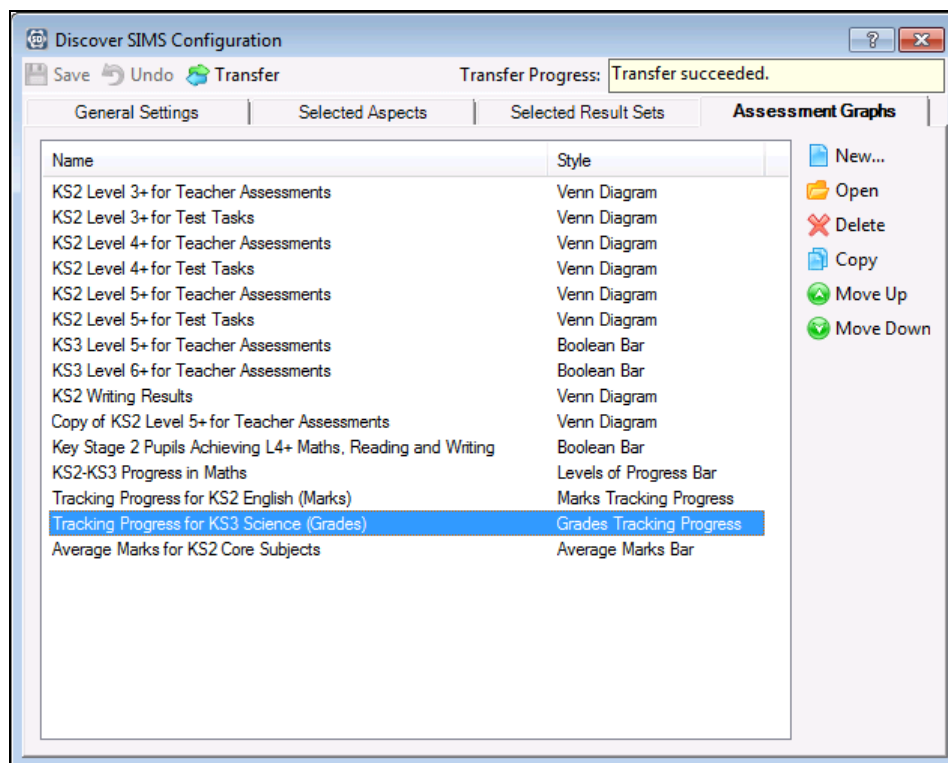
18. Highlight a result set name and click the **Open** button to display the **Edit Selected Result Set** dialog.



19. Edit the **Legend**, if required. This will be the name of the data item that is displayed on the x axis of the graph when it is compiled on the Discover canvas. This name can be amended, if required. Click the OK button to return to the **Add / Edit Assessment Graph** dialog.

The **Default View Mode** is set to **Line Graph** but this can be changed, if required.

20. Click the **OK** button to save the Assessment graph definition.



The new graph definition is listed in the **Assessment Graphs** page.

21. Click the **Save** button on the **Discover SIMS Configuration** utility to save the graph definition.

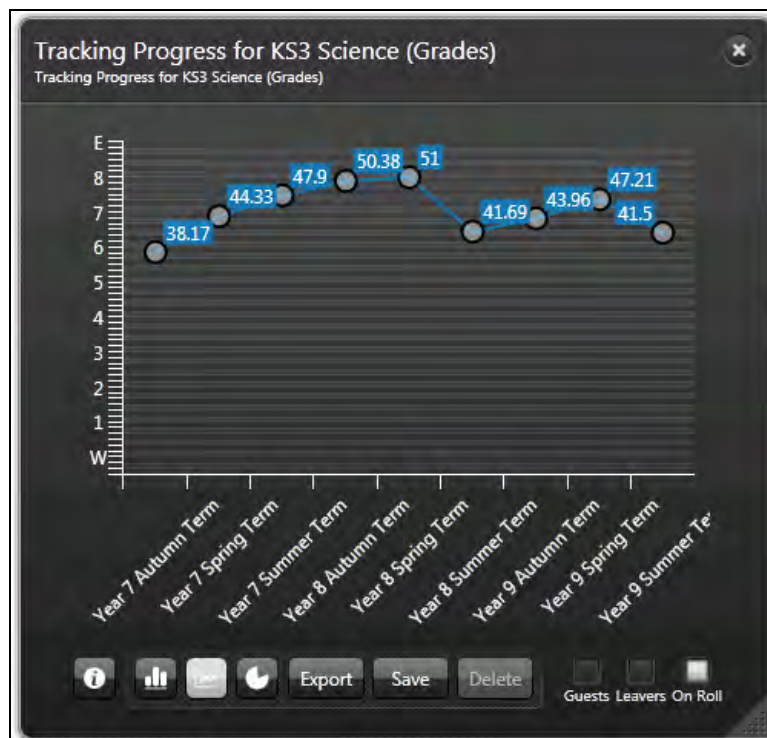


IMPORTANT NOTE: It is suggested that you click the **Transfer** button when you have made any changes in the **Discover SIMS Configuration** utility as this ensures that the changes are made straightaway. However, please ensure that this action will not affect other users of SIMS and Discover before proceeding.

The graph definition is now available in the drop-down list from the **Assessment** button on the **Discover Application Bar**.



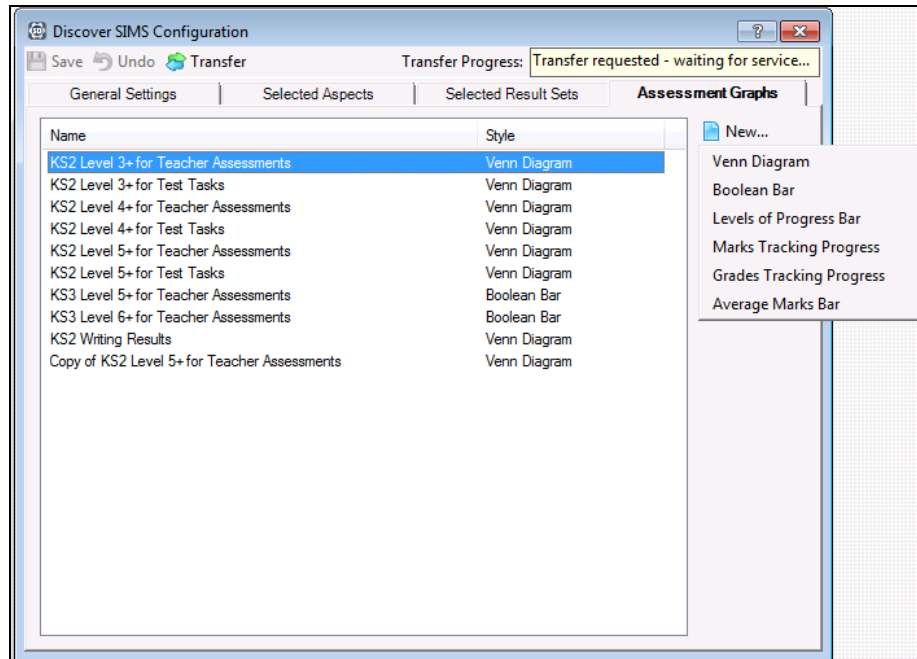
Assessment button



Where you have selected multiple aspects for inclusion in the **Grades Tracking Progress** graph definition, multiple lines are displayed on the compiled graph. This graphical representation is for a single aspect graph definition represented by a single line.

Adding /Editing an Assessment Graph of Average Marks Bar Style

It is essential that at least one Assessment definition is present in the SIMS database and that this has been transferred into Discover before you begin.



When copying an existing Assessment graph definition to use it as the basis for a new graph definition, the majority of the fields can be changed to reflect your new selections.

1. Select **Average Marks Bar** from the **New** button to display the **Add/Edit Assessment Graph** dialog.

The screenshot shows the 'Add/Edit Assessment Graph' dialog box. It is divided into two main sections: 'Basic Details' and 'Average Marks Bar Specific Details'. The 'Basic Details' section contains the following fields: 'Name' (a text input field), 'Description' (a text input field), 'Topic Fragment' (a text input field), 'Style' (a dropdown menu set to 'Average Marks Bar'), 'Pastoral Group Type' (a dropdown menu set to 'National Curriculum Year'), and 'Pastoral Group' (a dropdown menu). The 'Average Marks Bar Specific Details' section contains a table with three columns: 'Name', 'Column Heading', and 'Legend'. To the right of the table are five buttons: 'Add' (with a green plus icon), 'Open' (with a folder icon), 'Remove' (with a minus icon), 'Move Up' (with a circular arrow icon), and 'Move Down' (with a circular arrow icon). At the bottom of the dialog, there are two more fields: 'Result Set' (a text input field) and 'Default View Mode' (a dropdown menu set to 'Bar Graph'). Finally, there are 'OK' and 'Cancel' buttons at the bottom right.

2. In the **Basic Details** panel, enter a unique **Name** for the new graph definition.
3. Enter a meaningful **Description** that enables you to differentiate this Assessment graph from other, existing graph definitions.
4. Enter a **Topic Fragment**. This is merely a short abbreviation of the Description and can be based on the Key Stage, Year Group or other cohort of pupil/students that the graph definition is based on.

The **Style** field is populated automatically with the type of graph that you have chosen to define and cannot be changed.

The **Pastoral Group Type** field defaults to National Curriculum year but this can be changed by selecting an alternative cohort of pupil/students from the drop-down list.

5. Select the **Pastoral Group** from the drop-down list. This list is restricted by the cohort selection made in the **Pastoral Group Type** field, e.g. if National Curriculum Year is selected as the Pastoral Group Type, you can only select the pastoral group from a list of National Curriculum Years.

6. In the **Average Marks Bar Specific Details** panel, click the **Add** button to display the **Find Aspects** dialog. At least one aspect must be selected and the maximum number is 25.

7. Enter the **Name** or the **Column Heading** of the aspect that you are looking for.
8. Alternatively, enter the **Module** or the **Supplier** name, if known.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services, CES Discover Services.

The **Supplier** field displays the establishment that created the aspect, e.g. your LA or someone in your own school.

9. Select the appropriate **Type** from the drop-down list or enter the **Grade Set** name before clicking the **Search** button.

It is possible to leave all the search fields blank before clicking the **Search** button to display a list of all available aspects, if details of a specific aspect are not known.

The dialog is populated with a list of aspects that match the search criteria entered.

Multiple aspects can be selected in a block using the Shift key. Multiple aspects that are spaced throughout the list can be selected collectively using the Ctrl key.

10. Select the required aspect and click the **OK** button to select it. Continue adding aspects, as required. Please repeat Steps 6-10.
11. In the **Add/Edit Assessment Graph** dialog, highlight an aspect name and click the **Open** button to display the **Edit Selected Aspect** dialog.

Edit Selected Aspect

Basic Details

Name: MA KS2: Mathematics Total

Column Heading: Maths Total Score KS2

Legend: Maths Total Score KS2

OK Cancel

12. Edit the **Legend**, if required. This will be the name of the data item that is displayed on the x axis of the graph when it is compiled on the Discover canvas. This name can be amended, if required.
13. Click the **OK** button to return to the **Add/Edit Assessment Graph** dialog.

Add/Edit Assessment Graph

Basic Details

Name: Average Marks for KS2 Core Subjects

Description: Average Marks for KS2 Core Subjects

Topic Fragment: Average Ma

Style: Average Marks Bar

Pastoral Group Type: Year Group

Pastoral Group: Year 7

Average Marks Bar Specific Details

Aspects

Name	Column Heading	Legend
EN KS2: English ...	English Total M...	English Total M...
MA KS2: Mathe...	Maths Total Sco...	Maths Total Sc...
SC KS2: Science...	Sci Total Score ...	Sci Total Score ...

Result Set: Key Stage 2 Validated Result

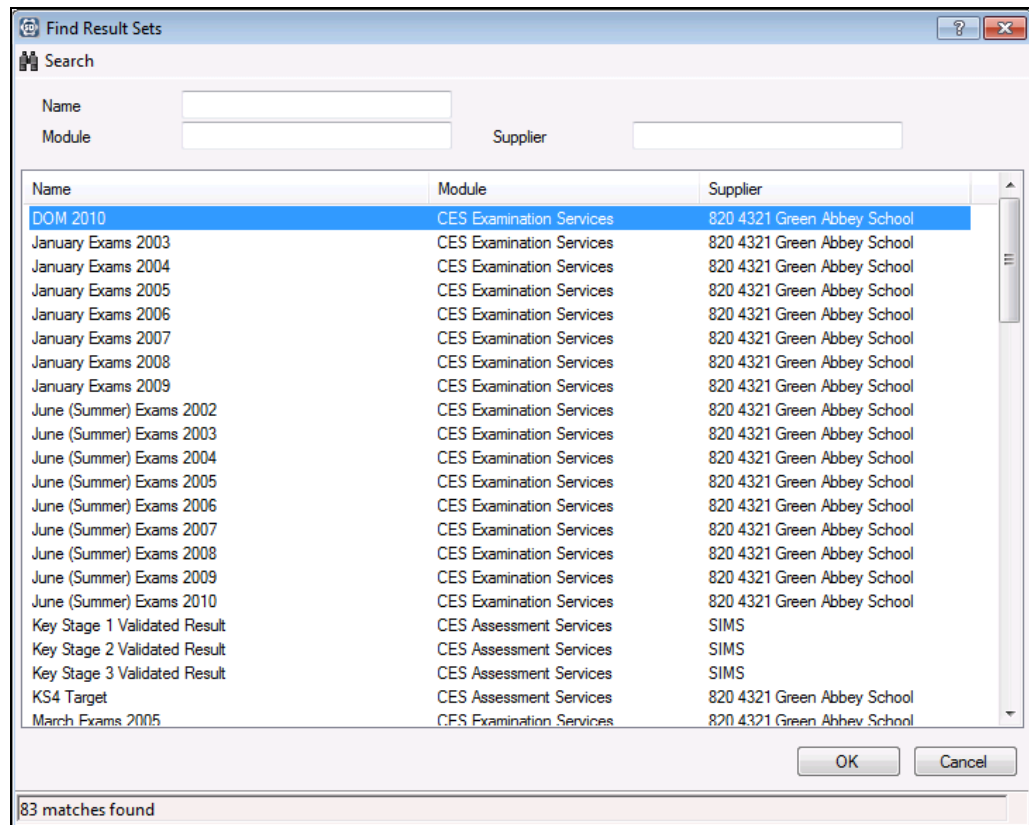
Default View Mode: Bar Graph

OK Cancel

If you have made a mistake when selecting aspects, highlight the incorrect aspect name and click the **Remove** button to delete the aspect from the list of those available for inclusion in the graph.

Where multiple aspects have been selected, highlight an aspect and click the **Move Up** or **Move Down** button to re-arrange the order of the aspects that you have selected.

14. In the **Result Set** panel, click the **Browser** button to display the **Find Result Sets** dialog.



15. Enter the **Name** of the result set, if known.
16. Alternatively, enter the **Module** name or the **Supplier** name before clicking the **Search** button.

The **Module** field filters the aspects on the name of the SIMS module that was originally used to create them, e.g. CES Assessment Services, CES Discover Services, etc.

The **Supplier** field displays the establishment that created the result set, e.g. your LA or someone in your own school.

The dialog is populated with a list of result sets that match the search criteria entered.

It is possible to leave all the search fields blank before clicking the **Search** button to display a list of all available result sets, if details of a specific result set are not known.

17. Select the required result set and click the **OK** button to return to the **Add/Edit Assessment Graph** dialog.

Add/Edit Assessment Graph

Basic Details

Name: Average Marks for KS2 Core Subjects

Description: Average Marks for KS2 Core Subjects

Topic Fragment: Average Ma

Style: Average Marks Bar

Pastoral Group Type: Year Group

Pastoral Group: Year 7

Average Marks Bar Specific Details

Aspects

Name	Column Heading	Legend
EN KS2: English ...	English Total M...	English Total M...
MA KS2: Mathe...	Maths Total Sco...	Maths Total Sc...
SC KS2: Science...	Sci Total Score ...	Sci Total Score ...

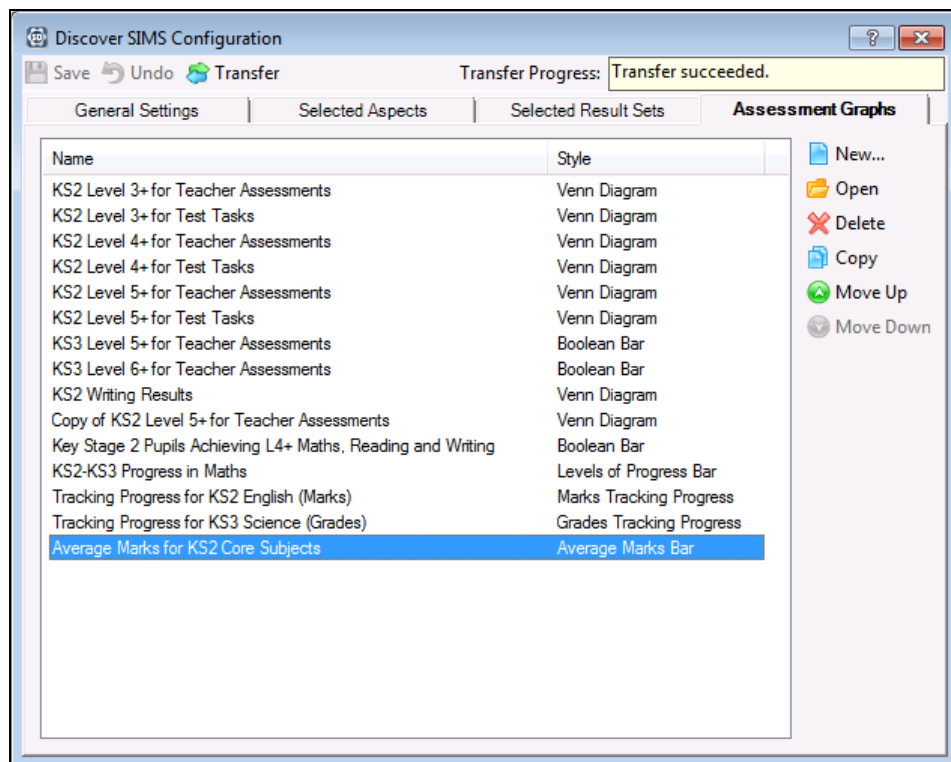
Result Set: Key Stage 2 Validated Result

Default View Mode: Bar Graph

OK Cancel

The **Default View Mode** is set to **Bar Graph**, by default and this cannot be changed.

18. Click the **OK** button to save the Assessment graph definition.



The new graph definition is listed in the **Assessment Graphs** page.

19. Click the **Save** button on the **Discover SIMS Configuration** utility to save the graph definition.



IMPORTANT NOTE: It is suggested that you click the **Transfer** button when you have made any changes in the **Discover SIMS Configuration** utility as this ensures that the changes are made straightaway. However, please ensure that this action will not affect other users of SIMS and Discover before proceeding.

The graph definition is now available in the drop-down list from the **Assessment** button on the **Discover Application Bar**.



Assessment button



Deleting an Assessment Graph Definition

Highlight any extraneous graph definitions and click the **Delete** button to remove them from the Assessment Graphs page. This also removes the graph definition from the drop-down list of available graph outputs from the **Assessment** button on the **Discover Application Bar**. It is not possible to delete the pre-defined Assessment graph definitions that have been supplied by Capita SIMS.



Assessment button

Running the Transfer Process

It is possible to click the **Transfer** button at any time whilst using the **Discover SIMS Configuration** utility. This ensures that any settings that you may have changed since the last **Transfer** process was run are applied as soon as possible.

Please ensure that no other users are affected by the transfer process before continuing.

In the **Tool Bar** of the **Discover SIMS Configuration** utility, the **Transfer Progress** data field enables you to see the status of the last transfer that was initiated.

The screenshot shows the 'Discover SIMS Configuration' window with the 'General Settings' tab selected. At the top right, the 'Transfer Progress' field shows 'Transfer succeeded.' Below this are several configuration sections:

- Attendance Intervals:**
 - Percentage Attendance graph(s): Size (%) 1.0, Count 7
 - Percentage Lates graph(s): Size (%) 1.0, Count 7
- Achievement Intervals:**
 - Achievement Points graph(s): Size 10, Count 7
- Behaviour Intervals:**
 - Behaviour Points graph(s): Size 10, Count 7
 - Behaviour Incidents graph(s): Size 10, Count 7
- Exclusions Intervals:**
 - Excluded Days graph(s): Size 10, Count 7
- Postcode Analysis:**
 - UK Enquiries by Postcode graph(s): Level Postcode Sector (eg "MK44 3")
- Transfer Offset:**
 - Time (h) 0

Hover help on this data field displays the date and time of the **Last successful transfer** along with the date and time of a transfer currently underway, if applicable.

Please refer to *Using the Discover SIMS Configuration Utility to Create Assessment Graphs* on page 61 for more detailed information relating to the transfer process and the possible messages that may be reported in the **Transfer Progress** data field, together with the meaning of the messages.

06 Working with Venn Diagrams

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Introduction

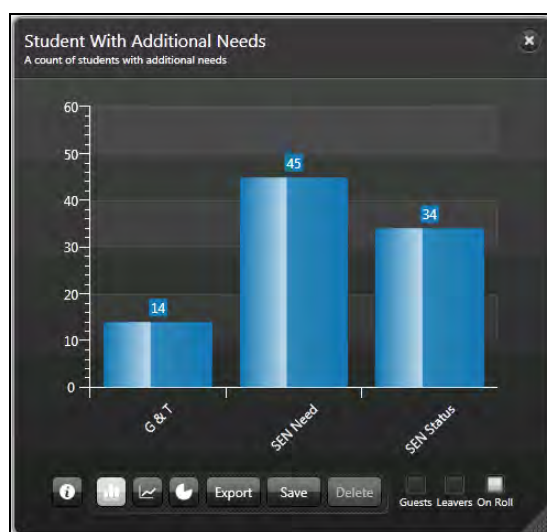
You can select up to three data items from a graph(s) that you are currently viewing and drag and drop them onto the canvas to create a Venn diagram. As a general rule, data items from any graphs that are based on a count of pupil/students can be merged into a Venn diagram.

For the following example, the **Students with Additional Needs** graph is selected by clicking the **Additional Needs** button.



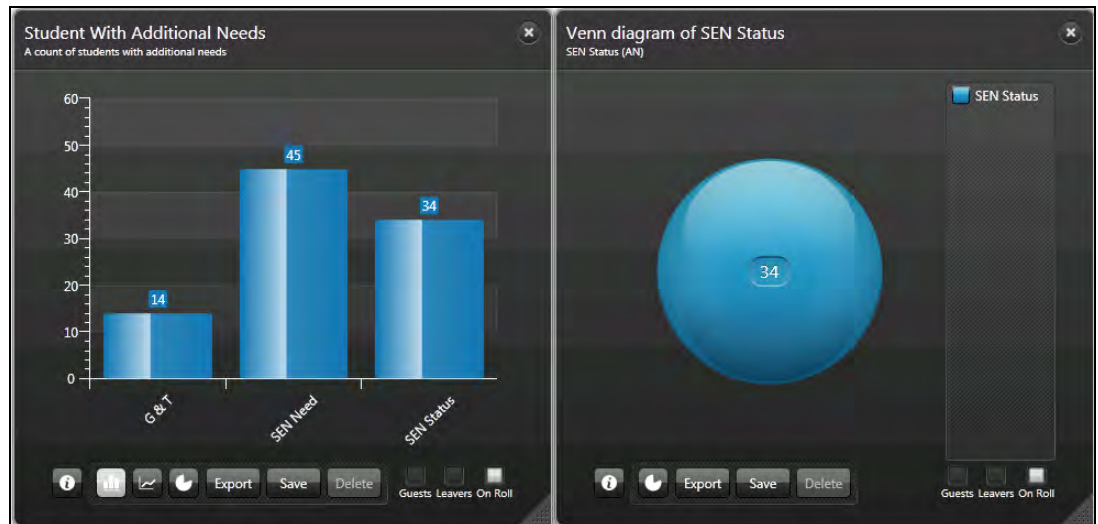
Additional Needs button

1. Select the required graph name from the drop-down list. Ensure that the appropriate **Client Filter** is selected, e.g. **Guests**, **Leavers** or **On Roll** pupil/students.



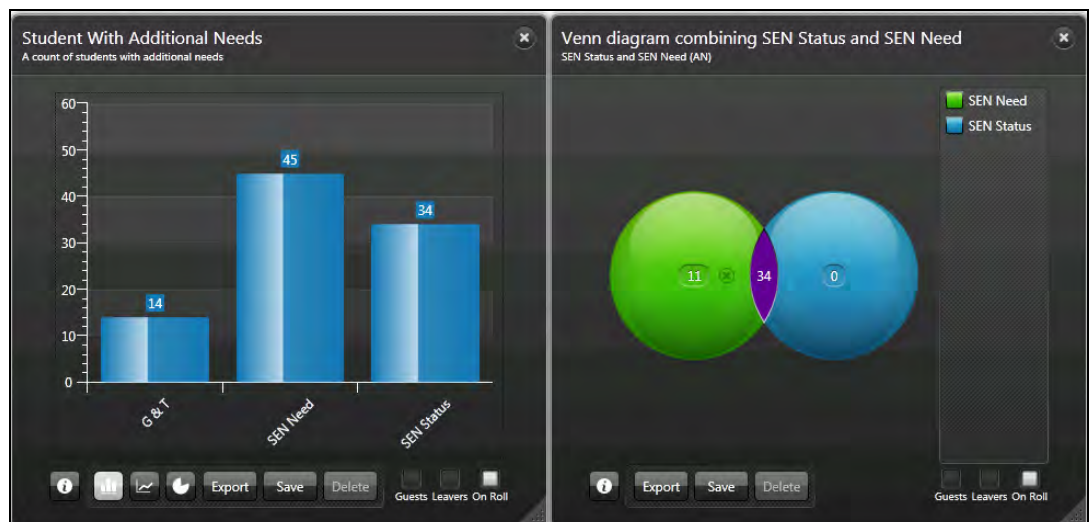
2. Click into the required data item on the graph and drag and drop it onto the Discover canvas.

A single, circular Venn diagram is created for the data item. It is labelled with a key in the right-hand side of the new graph showing the colour used to represent the data item. The number of pupil/students, who make up the total of the data item, is shown in the centre of the first Venn diagram circle.



3. Click into a second data item from the original graph and drag and drop it onto the Venn circle in the new graph.

A second circle is created and labelled with a key in the right-hand side of the graph showing the colour used to represent this data item. The number of pupil/students, who make up the total of the data item, is shown in the centre of the second Venn diagram circle.

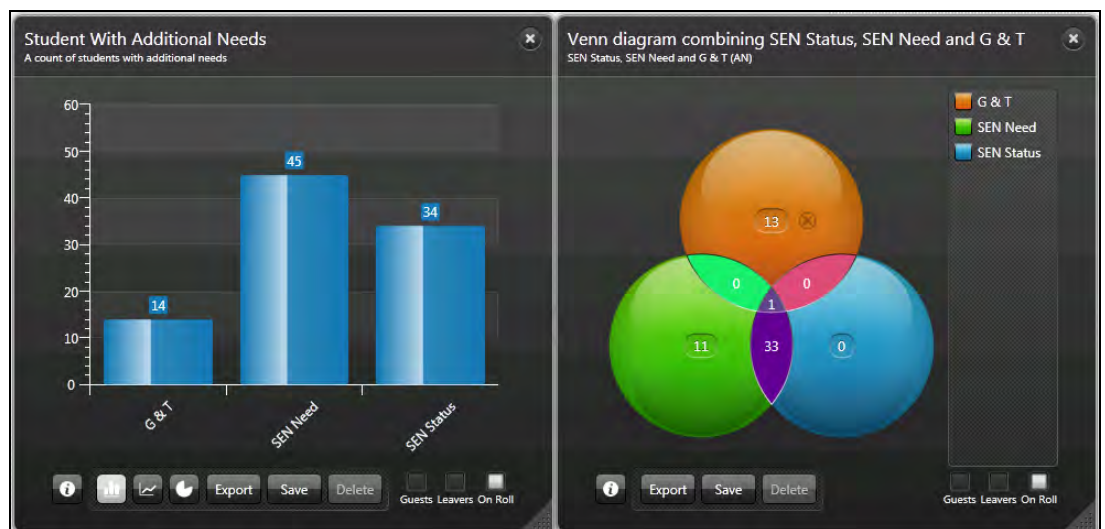


The intersection between the two data items is shown in another colour. This does not have a key because it does not represent a data item. The intersection does not necessarily contain any common data but where it does, the number of pupil/students who share the attributes of both data items, is displayed in the intersection.

The title of the newly created graph is updated each time to reflect the addition of subsequent data items.

4. Click into a third data item from the original graph and drag and drop it onto the Venn circles in the new graph.

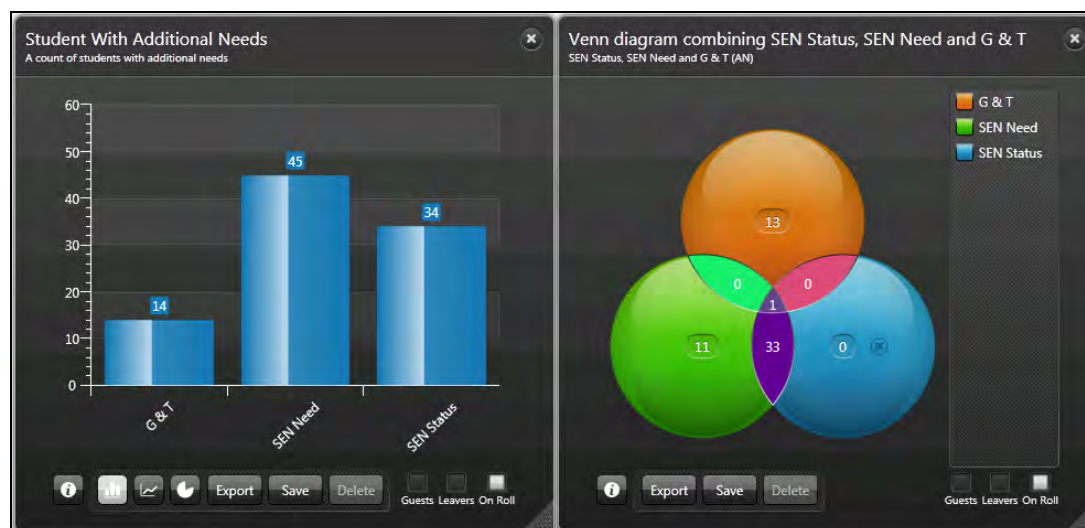
A third circle is created and labelled with a key in the right-hand side of the graph showing the colour used to represent this data item. The number of pupil/students, who make up the total of the data item, is shown in the centre of the third Venn diagram circle.



Where the three data items (each represented by an individually coloured circle) intersect, each area of the intersection is represented by a different coloured segment. The number of pupil/students, who share the attributes of any, some or all of the data items, is displayed in each intersection.

Removing a Circle from a Venn Diagram

It is possible to remove one or more of the Venn diagram circles and build another Venn using different data items from another graph, if required.



Allow the mouse to hover over the relevant circle. A small circular **Delete** button is displayed.

Click the **Delete** button to remove the relevant circle.

Please refer to *Hints and Tips for Viewing the Data in Each Segment of a Venn Diagram* on page 140 for further information.



IMPORTANT NOTES: When creating a Venn diagram from multiple graphs, the **Client Filter** that is selected on the graph from which the first data item is chosen determines how the subsequent data items are displayed. For example, if the **Student Totals by Year Group** graph has the **On Roll** client filter selected and **Year Group 8** is chosen as the first data item to use in a Venn diagram, the subsequent data items dropped onto the Venn diagram from other graphs only show **On Roll** pupil/students and not **Guests** or **Leavers**.

Creating a 5A*-C Venn Diagram

A number of activities must have been undertaken in Examinations Organiser to ensure that the necessary data is available for transfer into Discover:

- Exams Basedata for the appropriate season must have been imported.
- Results must have been recorded against the appropriate marksheets that contain the relevant aspects.
- Three new Discover aspects must be created via **Tools | Performance | Analysis | Discover Aspects of Multiple Grade Targets** mode:

One for 5A*-C Core subjects, one for A*-C English and another for A*-C Maths. Each of these aspects will represent a circle on the Venn diagram when it is compiled on the Discover canvas.

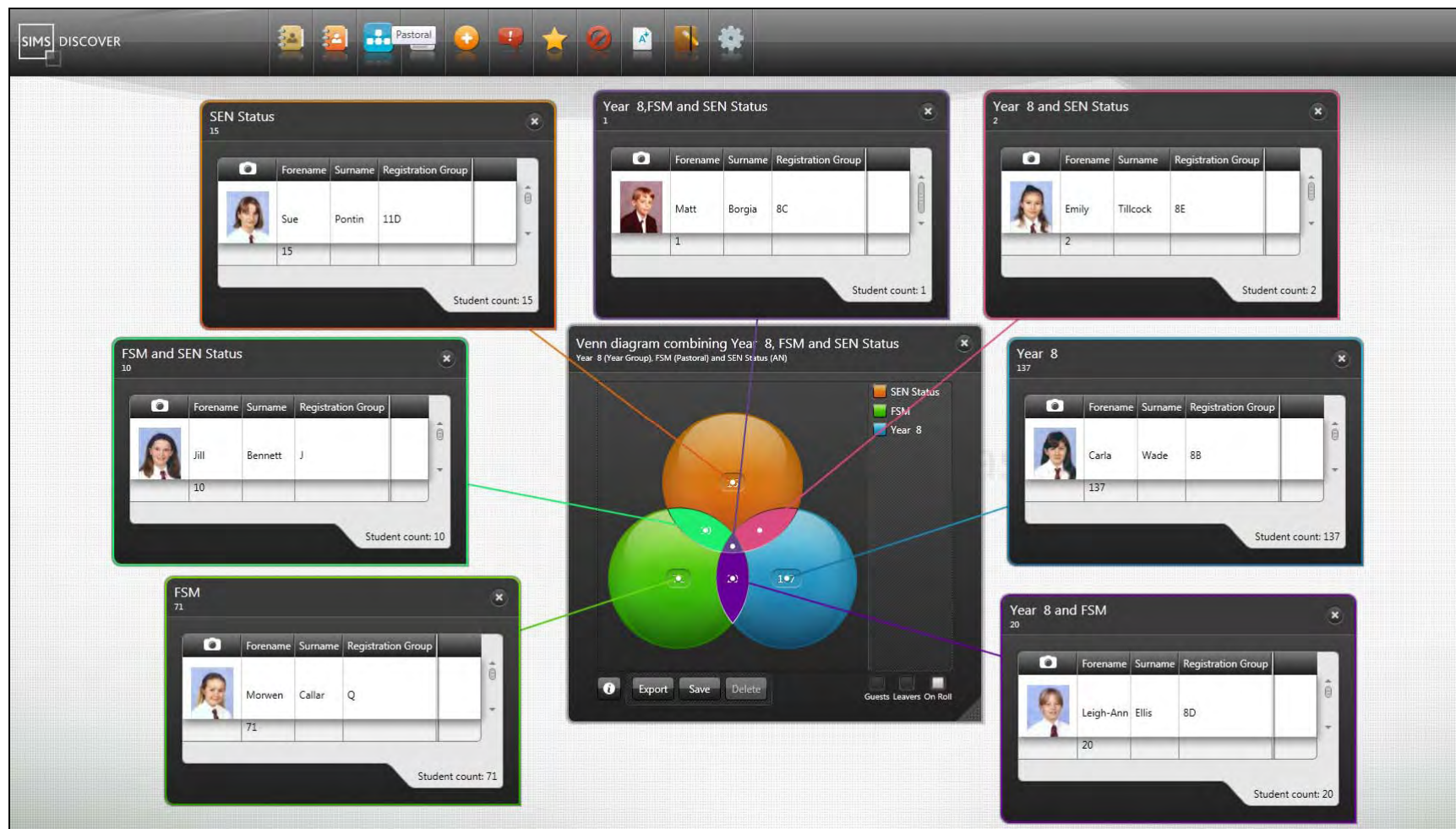
- Generate Results for the new aspects via **Tools | Performance | Analysis | Discover Setup**.
- In the **Discover SIMS Configuration** utility, click the **Transfer** button to copy the data over into Discover.
- Select the **Assessment Graphs** page and click the **New** button to create a new Venn diagram.
- In the **Add/Edit Assessment Graph** dialog, select the aspects that you created in SIMS so that they in the required order when the Venn diagram is compiled.
- When selecting the applicable **Result Set**, ensure that you choose the appropriate season in which the exam grades were awarded.
- Open Discover and select the newly created 5A*-C graph description from the drop-down list in the Assessment catalogue.

Click into each segment of the Venn diagram to create pop-ups. This enables you to view the pupil/students who have achieved the required results.



Hints and Tips for Viewing the Data in Each Segment of a Venn Diagram

- Before creating pop-ups, it is advisable to maximize the space available on the Discover canvas so that there is sufficient room to arrange the pop-ups into a suitable position around the Venn diagram. Click the relevant **Category** button to close the drop-down list of available graph outputs and close any other graph outputs that you may have been looking at.
- When you click into a segment of the Venn diagram, a pop-up is created. It is possible to create a pop-up for each individual segment of the Venn diagram.
- Each pop-up is labelled according to the population of pupil/students that it represents in the Venn diagram. The total number of pupil/students who fall into this population is shown in the top left-hand corner of the pop-up. Use the scroll bar to view the details of all the pupil/students. Click into a column heading on a pop-up to sort the pupil/students by the data field represented in the column heading.
- Once pop-ups have been created, the Venn diagram and its associated pop-ups can be moved around the Discover canvas by dragging the Venn diagram. The pop-ups remain in position in relation to the Venn diagram unless they are clicked on and dragged independently of the original graph.
- The pop-ups can be dragged and dropped so that they are adjacent to the segment of the Venn diagram that they relate to. A line indicator links each pop-up to its related segment on the Venn diagram and the line indicator expands and contracts as the pop-up is moved around the Discover canvas. The colour of the line indicator and the pop-up surround correspond to the colour of the applicable segment in the Venn diagram.
- The graph showing the Venn diagram cannot be closed or resized whilst the pop-ups remain open. To close a pop-up, click into the appropriate segment of the Venn diagram and the pop-up and its associated line indicator are removed.
- Changing the **Client Filters** on the Venn diagram results in all the pop-ups closing automatically.
- When viewing the reverse side of a Venn diagram, it is suggested that you stretch the dialog as far across the Discover canvas as possible so that all the data columns can be seen clearly. Use the scroll bar to view the details of all the pupil/students.
- If you inadvertently drag the Venn diagram and its associated pop-ups off the bottom of the Discover canvas, click into the Discover canvas and drag the mouse cursor upwards until the graph reappears.



Venn diagram combining SEN Status, FSM and Year 8
 SEN Status (AN), FSM (Pastoral) and Year 8 (Year Group)

	Forename	Surname	DOB	Registration Group	Enrolment Status	Admission Number	SEN Status	FSM	Year 8	Count
	Sue	Pontin	11/11/1994	11D	On Roll	003233	☒			1
	Jodi	Moner	24/01/1996	10E	On Roll	003356	☒			1
	Thomas	Rider	23/07/1997	9E	On Roll	003594	☒			1
							28	102	160	290

Student count: 256

[Export](#)

07 Creating Groups in Discover and Viewing Discover Groups in SIMS

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Introduction

Two different types of Groups can be created in Discover based on a set of criteria or data items that you define yourself. The groups, once created, are maintained in Discover but **Dynamic** Discover groups can be transferred into the SIMS database so that they are also available for use in SIMS. Dynamic Discover groups can be used as filters from various places within SIMS including the Reporting Dictionary and areas of Assessment and Performance Analysis.

The two types of group that can be created in Discover are:

- a **Discover** group or,
- a **Dynamic** group.

However, only **Dynamic** Discover groups are visible in SIMS although these are (rather ambiguously) known as Discover groups in SIMS. A group saved with the type of **Discover** is only available within Discover and is not visible in SIMS.

Pupil/student membership of both group types is automatically maintained in Discover with pupil/students being added or removed at the time of the **Group Synchronisation Service** transfer process.



NOTE: Please liaise with your System Manager for further details regarding the Group Synchronisation Service Account. This service is defined as an integral part of the Discover installation process.

Adding /Editing a Discover Group

1. Click the **Groups** category button from the **Discover Application Bar**.



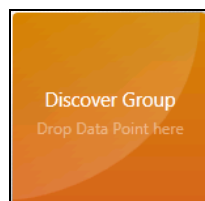
Groups button

2. Drag and drop the **Create new Discover Group** menu item onto the Discover canvas.

If you have already created some groups, they are listed beneath the **Create new Discover Group** menu item in the drop-down list.

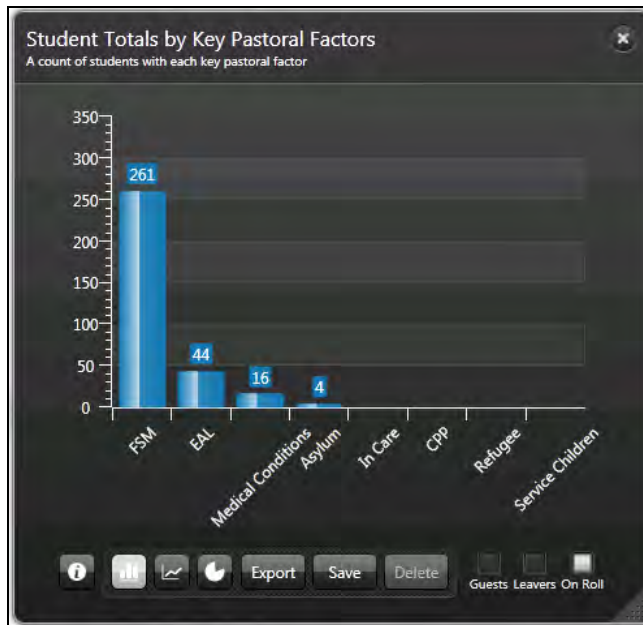


The **Discover Group Drop Data Point here** box is created.

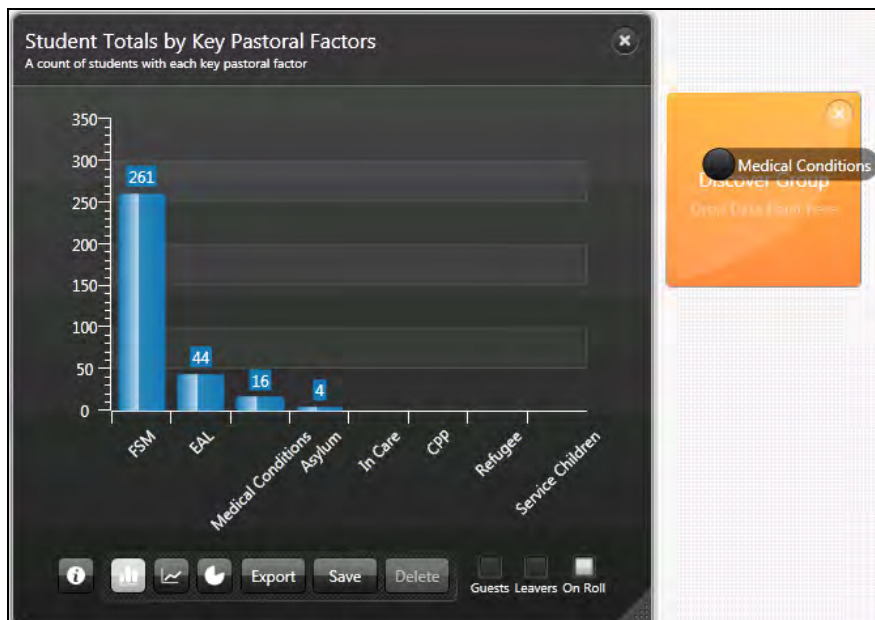


3. Click the applicable **Category** button from the **Application Bar** to view the drop-down list of available graph outputs.

4. Select the name of the relevant graph that contains the data item that you want to use in the new Discover group and drag and drop the graph onto the Discover canvas.

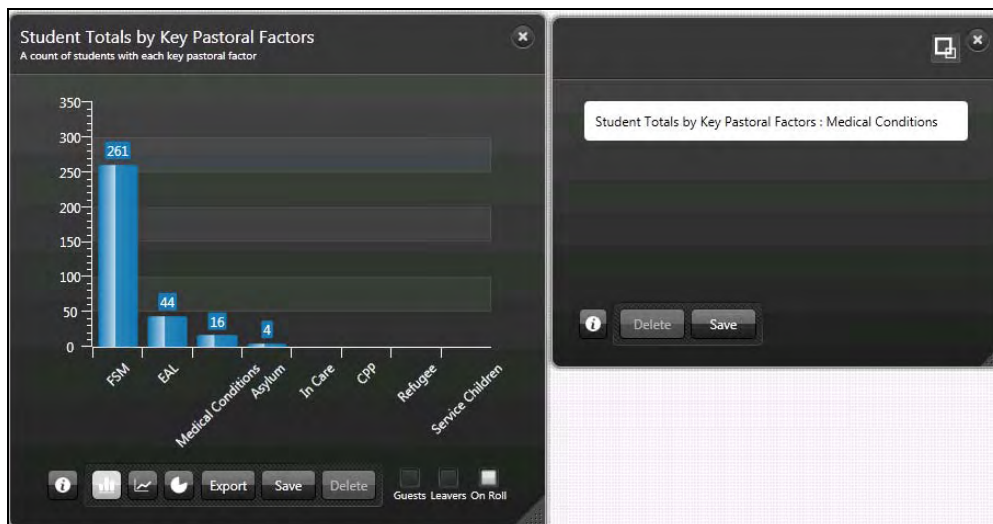


5. Once the graphical output has compiled, drag the required data item from the graph and drop it onto the **Discover Group Drop Data Point here** box.

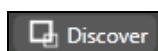


The name of the data item that you are dragging from the graph is visible in the cursor until you drop the data item onto the **Discover Group Drop Data Point here** box.

The **Discover Group Drop Data Point here** box becomes a black group dialog. The name of the data item that has been dropped onto the **Discover Group Drop Data Point here** box is displayed.



The icon in the top right-hand corner of the dialog indicates that the group type is currently set to the default of **Discover** group.



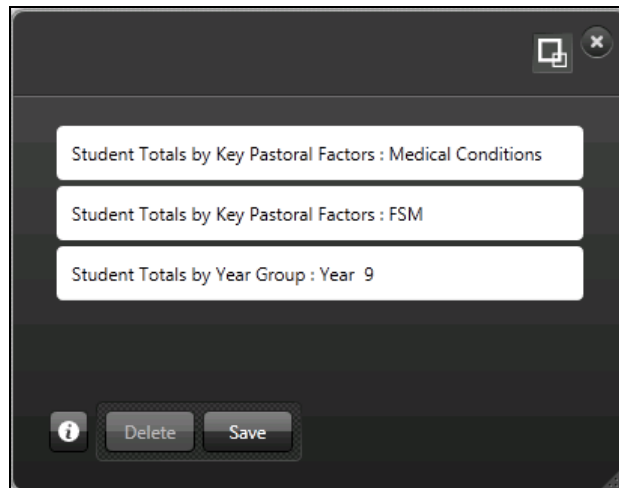
Discover button

Continue dropping data items onto the new group dialog until you have created a group that contains all the elements or data items that you want to include.

It is also possible to include a data series from a graph where the data items are separated by gender. For example, you can select only the male or female pupil/students in a year group by dragging and dropping the colour coded data item onto the new group dialog.

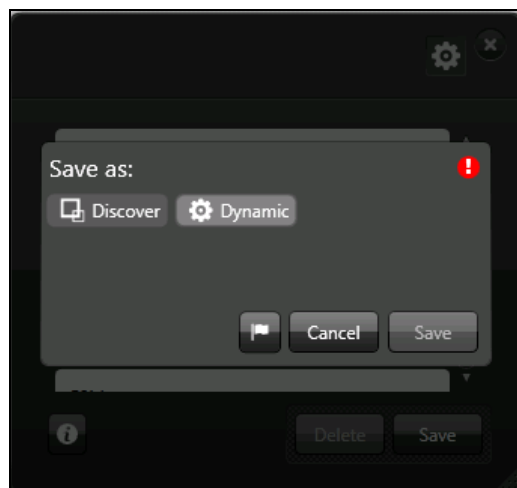


As you add more data items to the new group dialog, a scroll bar becomes visible on the right-hand side of the dialog enabling you to view all the selections that you have made.

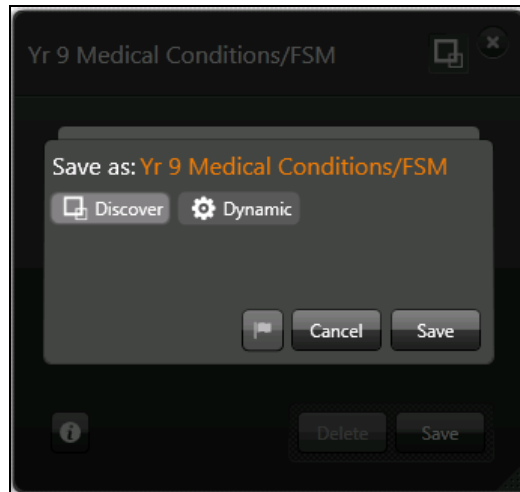


Hover over any of the data items and click the **Delete** button if the data item is not required in this group.

6. When you have added all the data items to the new group that you require, click the **Save** button to display the **Save as:** dialog.



7. Enter a unique and descriptive name for the new group and click the **Discover** button to distinguish the group as a **Discover** group type.

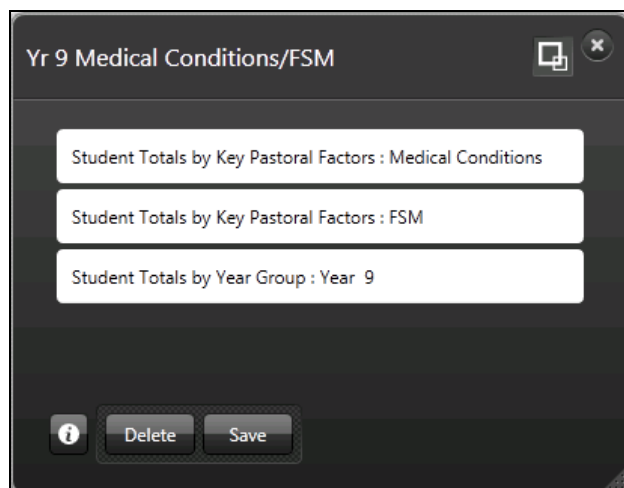


The **Alert flag** button remains greyed out because it is not necessary to create alerts for a Discover group type. If the **Dynamic** button were selected, the **Alert flag** button becomes active. Please see *Specifying the Dynamic Group Alerts* on page 152 for more detailed information.

8. Click the **Save** button.

Once you have saved the new **Discover** group, it is not possible to change the designation of the group to a **Dynamic** group type.

A group saved with the type of **Discover** is only available within Discover and is not visible in SIMS.



9. Click the **Information** button to rotate the group dialog and to view the reverse side.

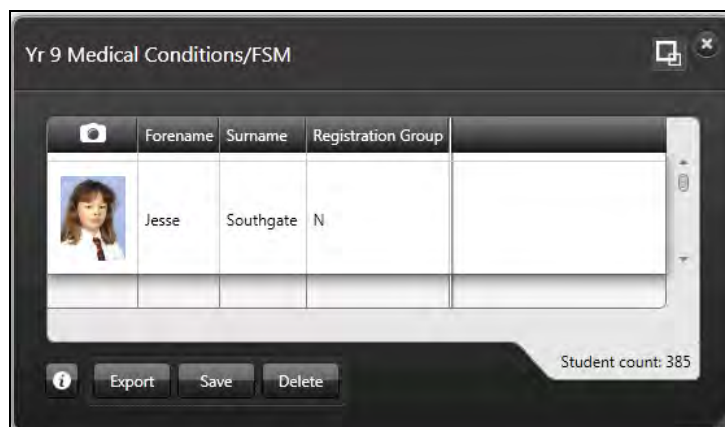


Information button

All the pupil/students who match any of the group criteria are displayed as members of the new group.



TIP: After rotating the group dialog to view the details on the reverse side, click on a column heading to change the sort order of the pupil/students.

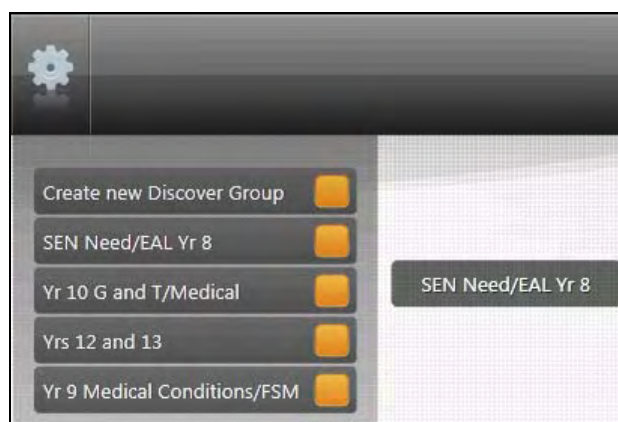


The new group is now available for selection from the **Groups** catalogue button from the Discover Application Bar.

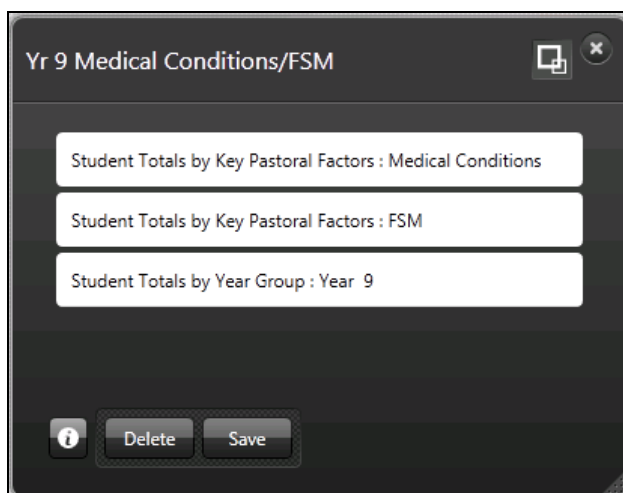
A Discover group has no end date and continues indefinitely until such time as you delete it from the Discover warehouse.

Deleting a Discover Group

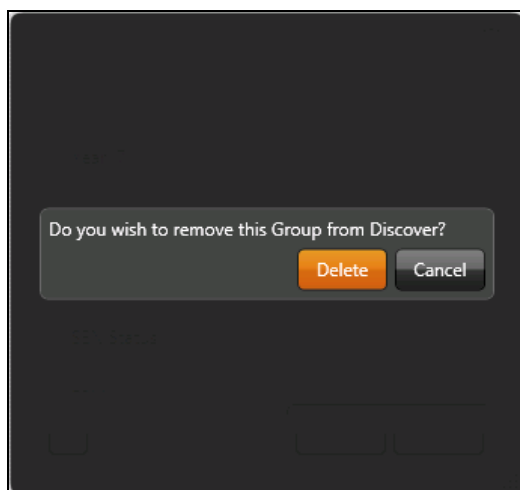
1. Click the **Groups** catalogue button and select the name of the **Group** you want to delete, from the drop-down list.



2. Drag and drop the **Group** onto the Discover canvas.



3. Click the **Delete** button to display the following message:



4. Click the **Delete** button to confirm the deletion of the group from Discover.

Deletion of the group can also be carried out from the reverse side of the group dialog.

Adding / Editing a Dynamic Group

Pupil/student membership of a **Dynamic** Discover group is automatically maintained in Discover with pupil/students being added or removed at the time of the **Group Synchronisation Service** transfer process.



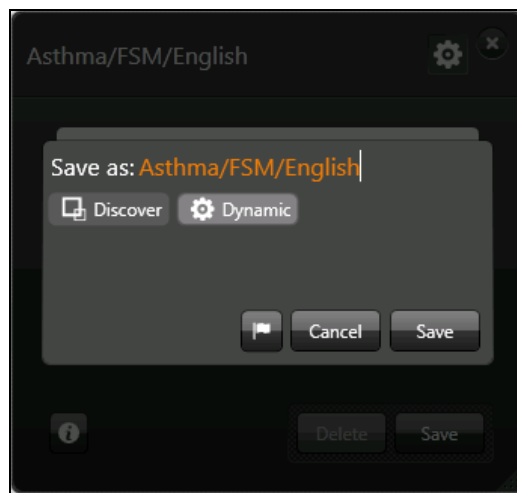
NOTE: Please liaise with your System Manager for further details regarding the Group Synchronisation Service Account. This service is defined as an integral part of the Discover installation process.

When you create a Dynamic Discover group, you are automatically assigned the role of Supervisor. Additional supervisors can be added to the group once it has been transferred into SIMS, via **Focus | Groups | Discover Groups**.

1. Create a new Dynamic Discover group in the same way as a Discover group. Please see *Adding/Editing a Discover Group* on page 144 for further information.
2. In the **Save as:** field, enter an appropriate name for the new Dynamic Discover group before clicking the **Save** button.



IMPORTANT NOTE: Please exercise caution when naming Dynamic Discover groups because the name will be visible to other users in SIMS who may not have suitable permissions to view the criteria used to define the group.



3. When saving the newly created group, click the **Dynamic** button instead of the **Discover** button.



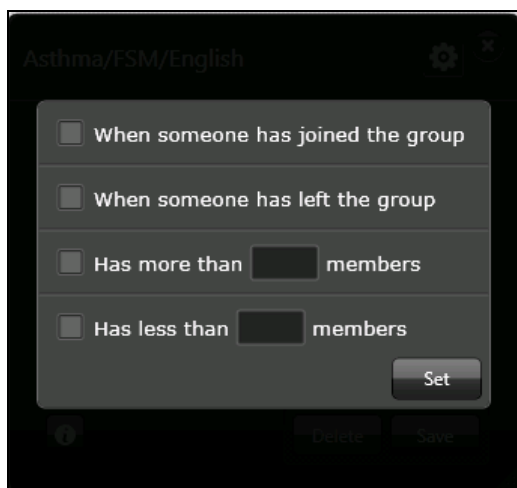
Dynamic button

The **Alerts flag** button is activated.



Alerts flag button

4. Click the **Alerts flag** button to display the **Alerts** dialog for the new Dynamic Discover group.



Specifying the Dynamic Group Alerts

The following alert notification options can be selected:

- When someone has joined the group
- When someone has left the group
- Has more than { } members
- Has less than { } members

It is possible to select all four of the alert options, if required.

Ensure that you specify an appropriate number of pupil/students in the third and fourth options.

Click the **Set** button to activate the alerts that you have selected.

Click the **Save** button. The new group is now available for selection from the **Groups** catalogue button from the **Discover Application Bar**.

Alert messages are sent when the **Group Synchronisation Service** transfer process is triggered. Alerts are sent to the named Group Supervisors and only one, collective alert is sent to each supervisor when the pupil/student membership of the group changes. An alert is not sent for each individual pupil/student.

It is possible to add alerts retrospectively to a Dynamic Discover group, if required. The Dynamic Discover group details must be saved again if any changes are made to the original group definition.

Viewing the Discover Group Details in SIMS

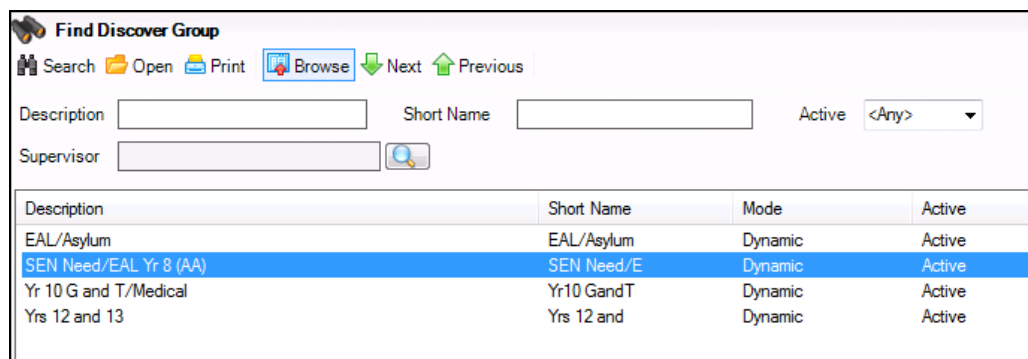
Discover groups can only be created in Discover and not in SIMS. However, it is possible to view the pupil/student memberships of a group and to add additional supervisors to a Dynamic Discover group from within SIMS, if required. It is also possible to change the period of time that a particular supervisor is responsible for the group.

All members of staff who are recorded as a supervisor of a group will receive alerts advising them of any changes that occur to the pupil/student memberships.

The memberships of both types of Discover groups are updated automatically as the populations change, e.g. when pupil/students leave or join the group based on the criteria defined when creating the group in Discover.

Searching for an Existing Discover Group

1. Select **Focus | Groups | Discover Groups** to display the **Find Discover Group** browser.



Find Discover Group

Search Open Print Browse Next Previous

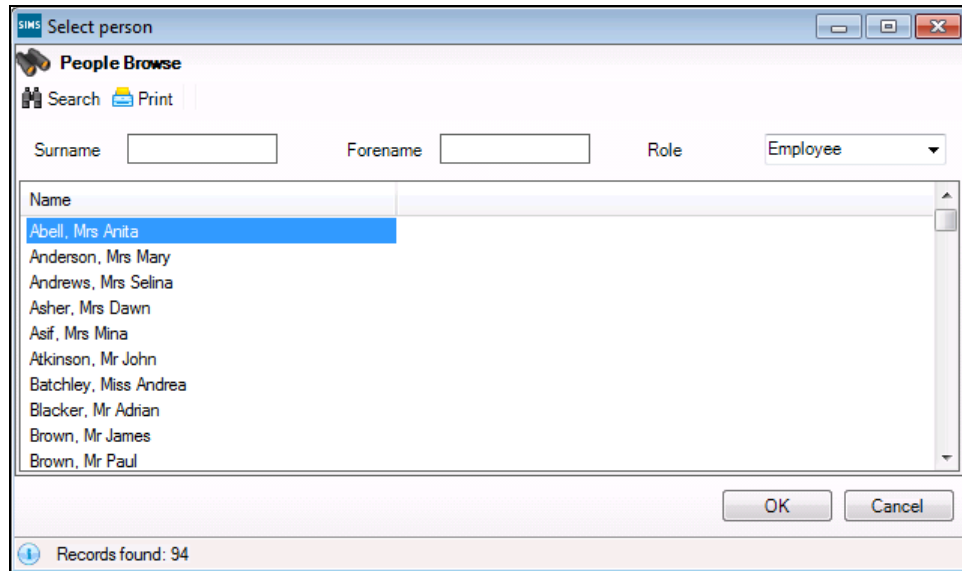
Description Short Name Active <Any> ▼

Supervisor 

Description	Short Name	Mode	Active
EAL/Asylum	EAL/Asylum	Dynamic	Active
SEN Need/EAL Yr 8 (AA)	SEN Need/E	Dynamic	Active
Yr 10 G and T/Medical	Yr10 GandT	Dynamic	Active
Yrs 12 and 13	Yrs 12 and	Dynamic	Active

2. Enter the **Description** and **Short Name** of the group or select the relevant **Active** status from the drop-down lists.

- Alternatively, click the **Browser** button adjacent to the **Supervisor** field to display the **Select Person** dialog.



- Enter the **Surname**, **Forename** or select the **Role** of the staff member who was recorded as a **Supervisor** of the group. When you create a group in Discover, you are automatically assigned to the group as a supervisor.
- Click the **Search** button to display a list of staff members who match the search criteria entered.
- Highlight the name of the required staff member and click the **OK** button to populate the **Supervisor** field in the **Find Discover Group** browser.
- Click the **Search** button to display a list of existing Discover Groups. Only groups that were defined as **Dynamic** groups in Discover are visible in SIMS.

8. Highlight the required group and click the **Open** button to display the **Discover Aspect Detail** page.

Discover Group Detail: EAL/Asylum

Save Undo Print

1 Basic Details 2 Supervisors 3 Memberships

1 Basic Details

Description: EAL/Asylum

Short Name: EAL/Asylum

Notes:

Criteria: Asylum, EAL

Mode: Dynamic

Active: ☒

2 Supervisors

Effective Date Range: Academic Year 2010/2011

Cursor Day: <None>

Cursor Date: <None>

Academic Year: Academic Year 2010/2011

Selected Supervisor: Brown, Mr James

Selected Supervision: <None>

Add Supervisor New Open Delete Zoom

Supervisor: External, An, Brown, Mr James

Calendar view showing months from Sep to Aug.

3 Memberships

Effective Date Range: Academic Year 2010/2011

Cursor Day: <None>

Cursor Date: <None>

Academic Year: Academic Year 2010/2011

Selected Member: Abdelkoder, Mohamed

Selected Membership: <None>

Zoom

The **Basic Details** panel displays the **Description**, the **Short Name**, any relevant **Notes**, and the **Criteria** that were specified when the group was created in Discover, the **Mode** selected (only Dynamic groups are visible in SIMS) and the **Active** status of the Discover group.



NOTE: The **Criteria** are visible to users with appropriate permissions only.

It is possible to change the **Short Name** and add any relevant **Notes** that relate to the Discover group in the **Basic Details** panel. You can also change the active status of the group by deselecting the **Active** check box. This prevents the Discover group from appearing in other areas of SIMS, e.g. in the **User Defined Groups** screen but does not affect its availability within Discover.

Adding a Supervisor to a Discover Group

In the **Supervisors** panel, you can change the **Effective Date Range** and the **Academic Year**. The **Selected Supervisor** and the **Selected Supervision** details were specified when the group was created in Discover.

2 Supervisors

Effective Date Range: Academic Year 2010/2011
 Cursor Day: <None>
 Cursor Date: <None>

Academic Year: Academic Year 2010/2011
 Selected Supervisor: External, An
 Selected Supervision: 28/02/2011 - <Date of Leaving>

+ Add Supervisor New Open Delete Zoom

Supervisor	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Abell, Mrs Anita												
Andrews, Mrs Selina												
External, An												

The **Cursor Day** and **Cursor Date** fields update to reflect the location of the cursor along the **Supervisor** timeline.

1. Click the **Add Supervisor** button to display the **Select Person** dialog.

SIMS Select person

People Browse

Search Print

Surname: Forename: Role: Employee

Name

- Abell, Mrs Anita
- Anderson, Mrs Mary
- Andrews, Mrs Selina
- Asher, Mrs Dawn
- Asif, Mrs Mina
- Atkinson, Mr John
- Batchley, Miss Andrea
- Blacker, Mr Adrian
- Brown, Mr James
- Brown, Mr Paul

OK Cancel

Records found: 94

2. Enter the **Surname**, **Forename** or select the **Role** of the staff member to be added as a **Supervisor** of the group. When you create a group in Discover, you are automatically assigned to the group as a supervisor.
3. Click the **Search** button to display a list of staff members who match the search criteria entered.

4. Highlight the name of the required staff member and click the **OK** button to display the **Add Supervisor** dialog.

The supervisor's **Full Name** field is already populated.

5. Click the respective **Calendar** button to change the **Start Date** and **End Date** of the time period that the staff member will be responsible for supervising this group.
6. Click the **OK** button to add the staff member's name to the **Supervisor** timeline.
7. If you want to edit the time period that an existing staff member is designated as a supervisor, highlight their name in the **Supervisor** timeline and click the **New** button to display the **Add/Edit Date Range** dialog.

8. Click the respective **Calendar** button to change the **Start Date** and **End Date** before clicking the **OK** button to return to the **Supervisor** timeline.

The orange bar that represents the time period for the staff member is updated to reflect the changes to the time period.

9. Click the **Zoom** button to expand or contract the **Supervisor** timeline display into day or calendar month sections.
10. Click the **Save** button on the **Discover Group Detail** page to save any changes that you have made to the group details.

Viewing and Deleting a Supervisor from a Discover Group

1. If you want to remove a supervisor from the Discover group before they reach their **End Date**, highlight their name in the **Supervisor** timeline and click the **Delete** button.

2 Supervisors

Effective Date Range: Academic Year 2010/2011 Academic Year: Academic Year 2010/2011

Cursor Day: <None> Selected Supervisor: External, An

Cursor Date: <None> Selected Supervision: 28/02/2011 - <Date of Leaving>

+ Add Supervisor + New + Open - Delete + Zoom

Supervisor	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Abell, Mrs Anita												
Andrews, Mrs Selina												
External, An												

2. If you want to view the date range during which a staff member is responsible for the group, highlight their name in the **Supervisor** timeline and click the **Open** button to view the **Add/Edit Date Range** dialog.

If you select the supervisor who originally created the group in Discover, the **End Date** field is empty.

SIMS Add/Edit Date Range

Supervisor: External, An

Date Range

Start Date: 01/09/2010

End Date: 31/08/2011

OK Cancel

3. Click the **OK** button to return to the **Discover Group Detail** page.
4. Click the **Save** button on the **Discover Group Detail** page to save any changes that you have made to the group details.

Monitoring the Pupil/Student Population of a Discover Group

The **Memberships** panel displays the **Effective Date Range**, the **Academic Year**, the **Selected Member** and the **Selected Membership** details, where specified.

3 Memberships

Effective Date Range: Academic Year 2010/2011 Academic Year: Academic Year 2010/2011

Cursor Day: Tuesday Selected Member: Abbey, Jimmy

Cursor Date: 21/06/2011 Selected Membership: <None>

Zoom

Member	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Abbey, Jimmy												
Abbot, Susan												
Abdelkoder, Mohamed												
Able, Benjamin												
Ackroyd, Marc												
Adam, Briony												
Aguilera, Christopher												

It is possible to change the **Effective Date Range** and the **Academic Year** fields to view the pupil/student population of the group at a specified date.

The **Cursor Day** and **Cursor Date** fields update to reflect the location of the cursor along the **Member** timeline.

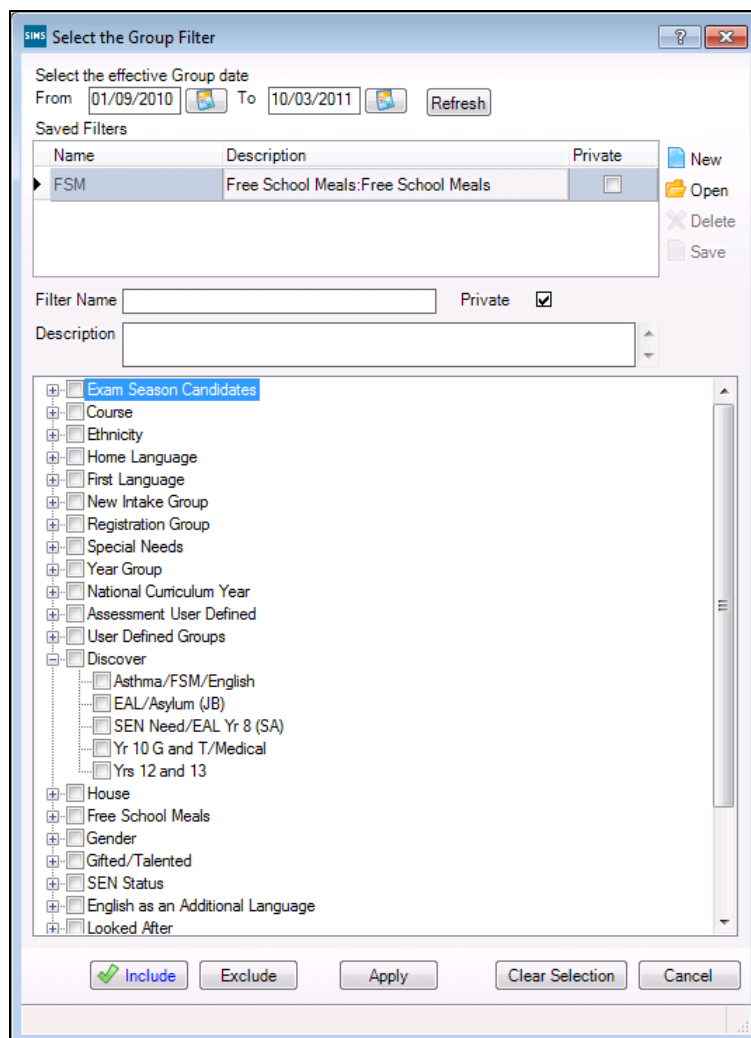
The **Zoom** button enables you to expand and contract the **Member** timeline view into day or calendar month sections.

The orange bar that represents the time period for the pupil/student's membership is updated to reflect the changes to the time period.

It is not possible to add pupil/student memberships to a Discover group from within SIMS.

Click the **Save** button on the **Discover Group Details** page.

Discover Groups are visible from various areas within SIMS, including Performance Analysis, Reporting, InTouch and Assessment.



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