SIMS

Configuring and Using the SIMS Home Page

applicable to 7.150 onwards

Mini Guide

Revision History

Version	Change Description	Date
7.150 - 1.0	Initial release.	11/03/2013
7.150 - 1.1	Index added.	21/03/2013

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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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Introduction

The SIMS **Home Page** provides an overview of the key and relevant content stored in SIMS relating to the currently logged in SIMS user. The information available to display includes events from the School Diary, reminders and messages. It is also possible to display attendance, assessment and pupil/student conduct summaries, tailored to the lessons for which you are the main class teacher.

The SIMS **Home Page** is displayed automatically each time you log into SIMS. If you close the screen, it can be re-opened by selecting **Focus | Home Page**.

When you first log into SIMS, a default set of panels will be displayed on your SIMS **Home Page**. The panels displayed are determined by your System Manager/Administrator and by the default Home Page group(s) to which you have assigned. However, many of the panels on the SIMS **Home Page** can be configured to display information relevant to you and your role. The display order of the panels can be changed and the text on each panel can be also be amended to reflect your requirements.

When SIMS is upgraded, all of your personalised settings are retained. Any changes you make to the layout and display of the SIMS **Home Page** affect the display of your Home Page only; these changes are not reflected on the Home Page of other SIMS users.

What's New in this Release?

The following change has been made in this release.

Redesign of the SIMS Home Page

A wide range of changes have made to the SIMS **Home Page** in this release.

Where the previous versions of the Home Page named the individual items displayed as 'panels', the new version names them 'widgets'. The user documentation has been updated in line with this change.

The vast majority of the functionality has been retained and new functionality has been added. On upgrade to this release, your existing Home Page settings are retained, as have your permissions.

The way that SIMS places widgets on the Home Page has been changed to make the most use of 'white space' on-screen, making the screen scalable. Where the original Home Page allowed a rigid two columns and a defined number of rows, the new release employs an intelligent, automatic placement of widgets; they are now placed in the next available space to the right of an existing widget.

The **My Classes Today** panel has been renamed the **My Timeline** widget. Its layout has been enhanced, to provide you with a mechanism that makes it easier to view your events over the course of a day, week, month, etc.

The following widgets can now be placed on the SIMS **Home Page**, many of which enable you to fine-tune their content to suit your requirements:

- My Timeline
- School Bulletin
- School Diary
- My Reminders
- Favourites
- My Messages
- Assessment Summary
- Conduct Summary
- Attendance Summary
- My Scheduled Reports
- Missing Registers Notification
- Scheduled Detention Sessions

Permissions

All SIMS users can access and view the SIMS **Home Page**. However, the functionality available to individual users depends on their permissions. Where applicable, any specific permissions required to access functionality on the SIMS **Home Page** are documented in this guide.

Please see your System Administrator/Manager if you are not sure whether you have the required permissions.

Additional Resources:

Managing SIMS Users, Groups and Databases handbook

For a list of the permissions available for each release, please refer to the appropriate permissions spreadsheet, which can be found on our SupportNet website (http://support.capitaes.co.uk/) by entering `PERMLIST` in the **Site Search** field on the SupportNet Home page then clicking the **Go** button.

Where to Find More Information

A wide range of documentation is available from within SIMS via the **Documentation Centre** and can be accessed by clicking the **Documentation** button on the SIMS **Home Page**. The range of documentation includes handbooks, tutorials, mini guides and quick reference sheets. Once open, click the appropriate button (e.g. **Handbooks**) then navigate to the applicable option.

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

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

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Viewing the My Timeline Panel

Your timetable is displayed in the **My Timeline** widget on the SIMS **Home Page**.

By default, your timetable is displayed for the current working week. Today's date is indicated on the timeline by a yellow highlight on the date in the heading row. In the previous graphic, today's date is Monday 4 March 2013. The scope of the view is displayed in the panel header. In the previous graphic, the timetable for the period Monday 4 March 2013 to Friday 8 March 2013 is displayed.

> *NOTE: The current time can be deduced by viewing the intersection of the highlighted date in the column header and the highlighted time bar displayed in the row header. In the previous example, it is approximately 08:30.*

The items that can be displayed on your timeline are defined by the timeline configuration process (please see *Home Page Timeline Configuration* on page *70*). By default, the following items are displayed on your timeline:

- School events (cream background. In the previous graphic, an SMT meeting is scheduled for 16:00 on Thursday 7 March)
- Timetabled lessons (dark blue background. In the previous graphic, all timetabled lessons are displayed in dark blue)
- Cover assignments (yellow background. In the previous graphic, there is a cover assignment scheduled for 12:35 on Monday 4 March)
- Detentions (red background. In the previous graphic, a detention session is scheduled for 15:30 on Tuesday 5 March)
- NCC periods (turquoise background)
- Cover rota periods (green background)
- PPA periods (light blue background. In the previous graphic, a PPA period is scheduled for 10:15 on Monday 4 March).

The range of options available on the **Timeline** widget are discussed in the following sections.

More Information:
Changing the Displayed Date of the Timeline on page *6*
Changing the Interval of the Timeline Widget on page *8*
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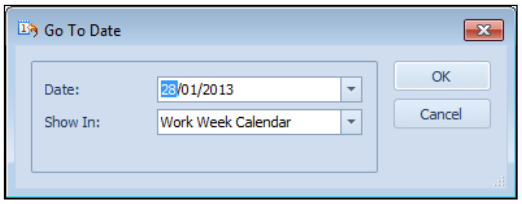
Printing the Content of the Timeline Widget on page *9*

Changing the Displayed Date of the Timeline

By default, your timetable is displayed for the current working week. This can be changed using right-click functionality in the date bar at the top of the **My Timeline** widget. This can be used in conjunction with the **View** options (please see *Changing the My Timeline View* on page *7*) to present the required display.

Right-click a date in the heading row at the top of the **Timeline** widget to display a pop-up menu.

- To go to a specific date, select **Go to Date** to display the **Go To Date** dialog.



  - Enter the required **Date** or select a date from the drop-down list.
  - Select the required timeline view from the **Show In** drop-down list. The options are **Day Calendar**, **Work Week Calendar**, **Week Calendar**, **Month Calendar**.
  - Click the **OK** button to return to the **My Timeline** widget.
- To revert to today's date, select **Go to Today**.

*NOTES: The date selected will show the **My Timeline** for that date in the selected view (please see* Changing the My Timeline View *on page 7).*

*The display settings are reset the next time you open the SIMS **Home Page**.*

Changing the My Timeline View

The display can be amended to show your timetable in one of the following formats:

Timeline View	What is Displayed?
Day View	Displays your timetable for today only.
Work Week View	Displays your timetable for the current working week. This is the default view.
Week View	Displays only events for which you are timetabled for the whole week (including weekends).
Month View	Displays only events for which you are timetabled for the whole month (including weekends).

Right-click a date in the column heading at the top of the **My Timeline** widget to display a pop-up menu. Alternatively, right-click a time in the row headings to access the same functionality.

Select **Change View To** then one of the following options to achieve the required view:

- Day View
- Work Week View (default)
- Week View
- Month View.

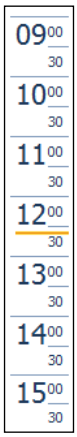
*NOTES: The view selected will show the **My Timeline** widget for the selected timeframe (please see* Changing the Displayed Date of the Timeline *on page* 6*).*

*The display settings are reset the next time you open the SIMS **Home Page**.*

Changing the Interval of the Timeline Widget

The time interval can be amended to show the content of the **My Timeline** widget in greater detail.

Right-click a date in the row heading on the **My Timeline** widget to display a pop-up menu.



The previous graphic shows a 30 minute time interval.

Select one of the following options to achieve the required view:

- 60 Minutes
- 30 Minutes
- 15 Minutes
- 10 Minutes
- 6 Minutes
- 5 Minutes

NOTES: The current selection is indicated by a tick in the pop-up menu.

*The more regular the interval, the more detailed the view on the **My Timeline** widget.*

*The display settings are reset the next time you open the SIMS **Home Page**.*

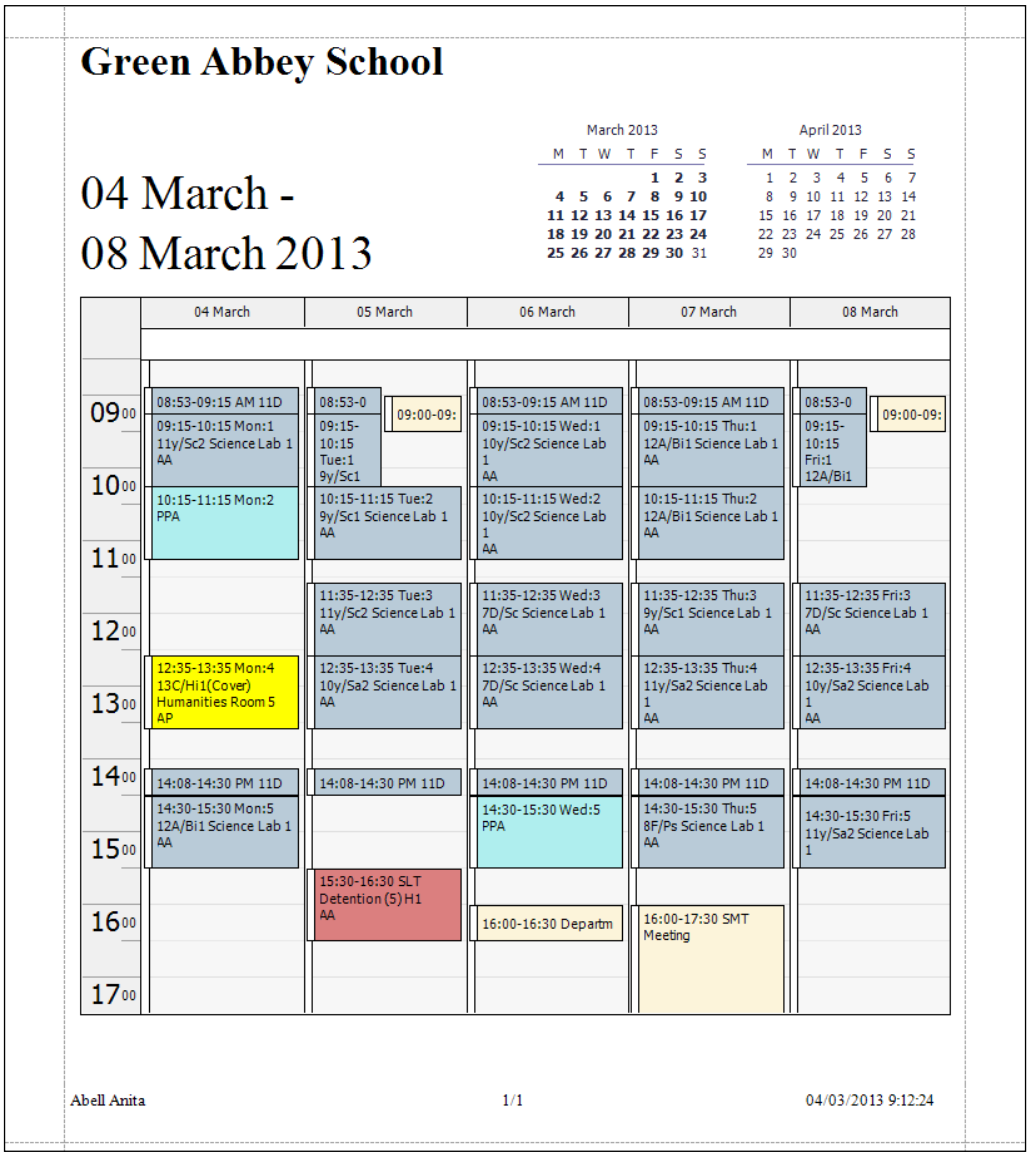
Printing the Content of the Timeline Widget

The content of the **My Timeline** widget can be printed.

The printed output produces the view of the **My Timeline** widget displayed on-screen at the time of printing. Therefore, you must prepare the **My Timeline** widget (i.e. select the required timeframe, the view and the interval) prior to printing.

1. Click the **Options** button then select **Print** from the pop-up menu to display the **Preview** page.

Options button



The preview displays your school name and the timeframe of the timeline, together with minimised calendars for the current and following month. On the minimised calendars, the days that contain a scheduled lesson, detention session, etc. are displayed in bold.

2. Click the **Print** button to print your timetable.

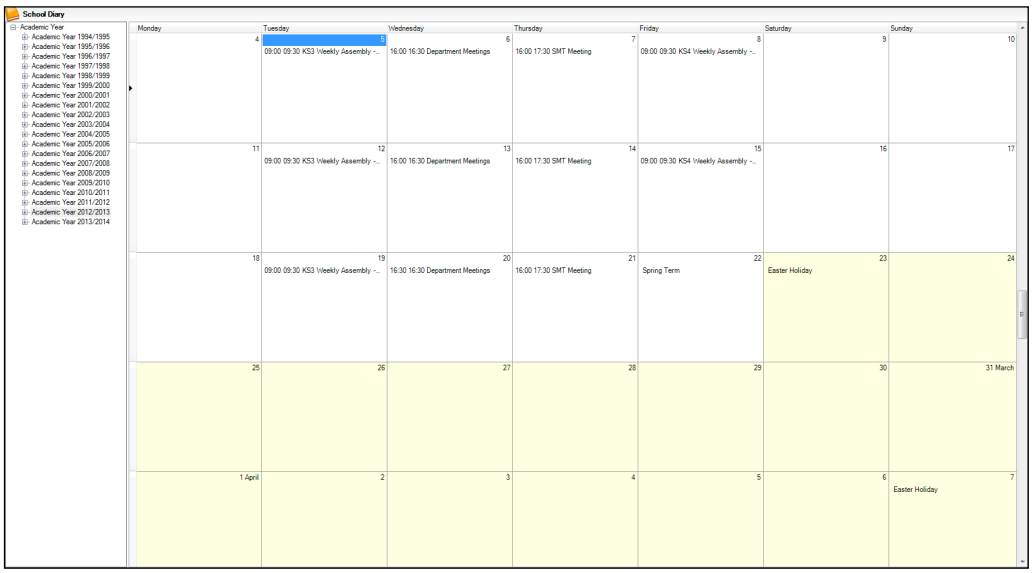
More Information:
Changing the Displayed Date of the Timeline on page *6*
Changing the My Timeline View on page *7*
Changing the Interval of the Timeline Widget on page *8*

Viewing the School Diary

The School Diary is used to record and display any school events that occur during the course of the academic year. These might include school trips, training days, staff meetings, parent consultation evenings, etc.

Click the **Options** button in the **My Timeline** panel then select **School Diary** from the pop-up menu to display the **School Diary** page.

Options button



*NOTE: The School Diary can also be accessed via the **School Diary** widget and via **Focus | School | School Diary**.*

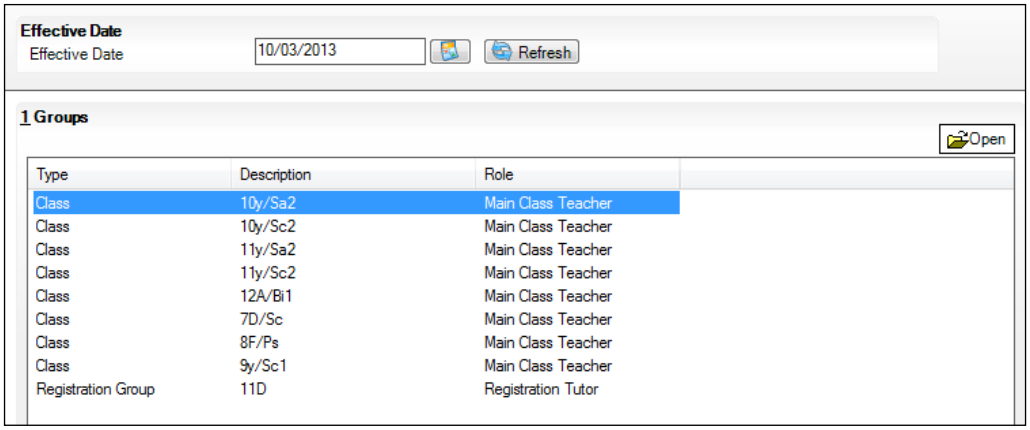
More Information:
Viewing the School Diary on page *17*

Viewing My Groups

Any groups for which you are the supervisor can be viewed from the **My Timeline** widget.

1. Click the **Options** button in the **My Timeline** panel then select **My Groups** from the pop-up menu to display the **Groups for** page.

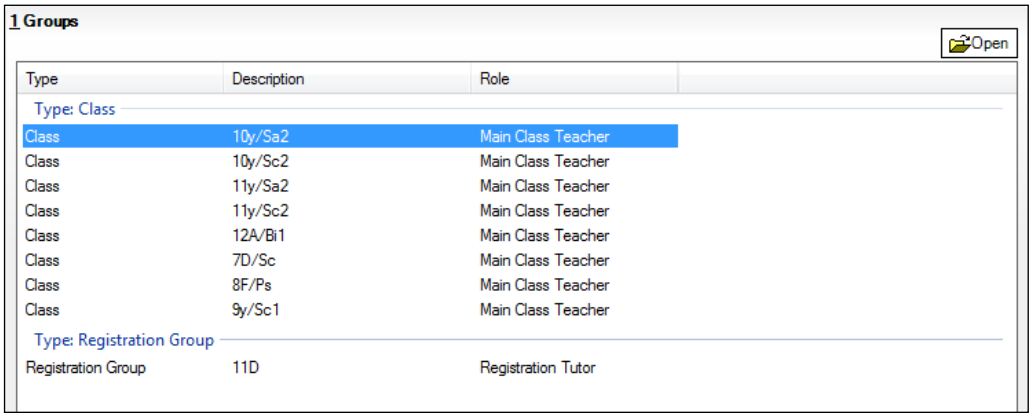
Options button



2. The **Effective Date** defaults to today's date but can be changed by entering the required date or clicking the **Calendar** button then selecting a date. If you change the date, you must click the **Refresh** button to update the list of **Groups**.

   In the **Groups** panel, all the groups of which you are a member (on the effective date) are displayed, together with the group **Description** and the staff member's **Role** in the groups.

   This information can be viewed in a variety of display orders. Right-click anywhere in the dialog then select **Type**, **Description** or **Role** from the pop-up menu to display the content in the selected order.



   Revert to the original display by right-clicking anywhere in the dialog then selecting **Hide Groups** from the pop-up menu.

3. Either double-click the group that you wish to view in more detail or highlight it then click the **Open** button.

   The **Basic** panel displays the **Group Name**, **Group Type** and **Supervisor**. If you have the appropriate permissions, you can click the **Supervisor** hyperlink to display their full employee record on the **Employee Details** page.

   The **Members** panel displays all the group members, together with the number of members (**Count**).

   This information can be viewed in a variety of display orders, as described in Step 2.

4. To drill down to the pupil/student record, double-click the required pupil/student or highlight them then click the **Open** button to display the **Student History** page.
5. Click the **Print** button to print a copy of the list of groups.

Configuring the My Timeline Widget

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

Click the **Options** button in the **My Timeline** panel then select **Configure** from the pop-up menu to display the **Timeline Configuration** dialog (please see *Configuring the My Timeline Panel* on page *74*).

Options button

Refreshing the Content of the My Timeline Widget

Many of the widgets on the SIMS **Home Page** can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **My Timeline** widget manually.

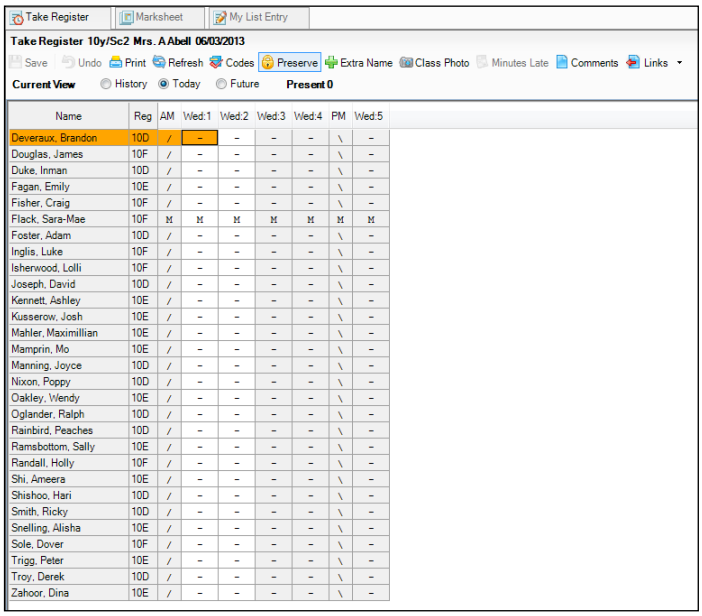
Click the **Refresh** button in the **My Timeline** widget to refresh its content.

Refresh button

More Information:
Configuring the My Timeline Panel on page *74*

Taking the Register

Right-click the required class or registration group in the **My Timeline** widget then select **Take Register** from the pop-up menu to display the **Take Register** page for the selected class, enabling the register to be taken. For Attendance users, this displays AM or PM attendance registers. For Lesson Monitor users, this displays the applicable register.

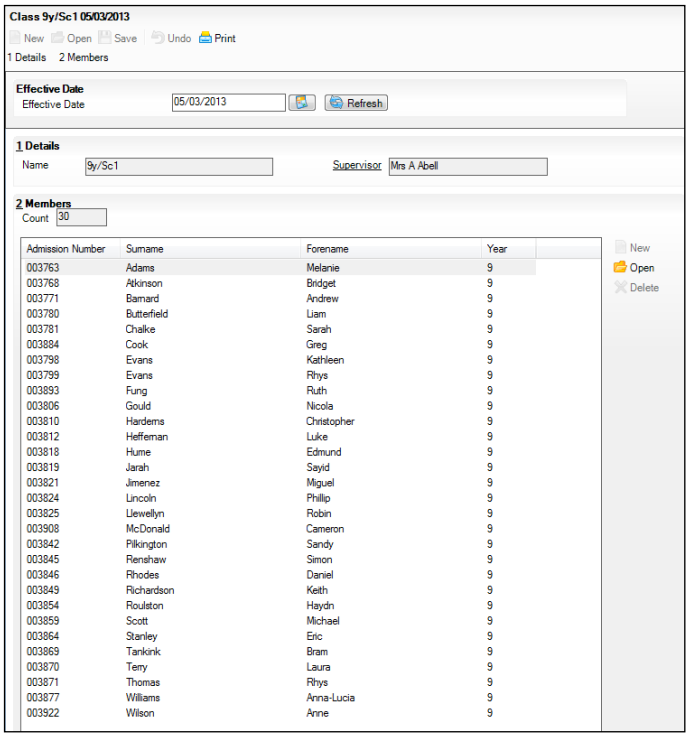


Additional Resources:

Taking a Register chapter in the *Managing Pupil/Student Attendance* handbook
Taking a Register chapter in the *Monitoring Session and Lesson Attendance* handbook

Generating a Student List Report

Right-click the required class or registration group in the **My Timeline** widget then select **Student List** from the pop-up menu to display the **Class** page or the **Registration Group** page (depending on the type of class selected), which displays the members of the selected class.



From here it is possible to display a pupil/student's details (by highlighting their name then clicking the **Open** button) and to print the class list (by clicking the **Print** button).

Viewing Marksheets

Right-clicking the required class in the **My Timeline** widget then select **Marksheets** from the pop-up menu to display the **Find Marksheet** browser, which displays all the marksheets for which you have permission to view. Double-click the required marksheet to display it on the **My Marksheet Entry** page.

Additional Resources:

Entering and Reviewing Data using Marksheets chapter of the *Administering Assessment* handbook

Profile List Entry

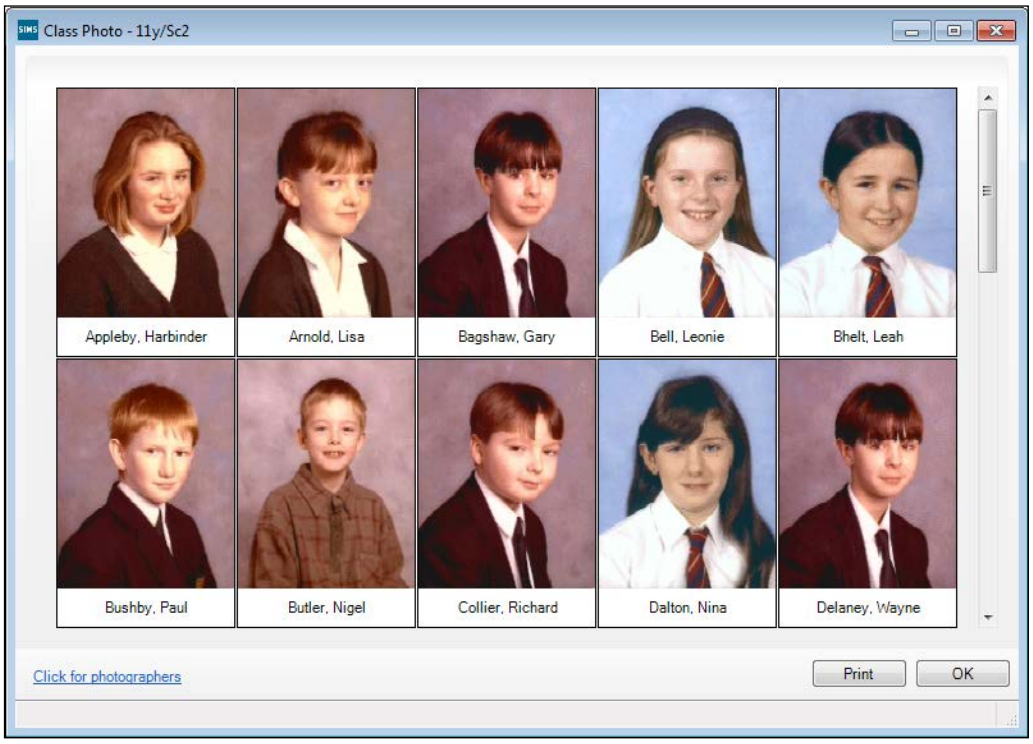
Right-click the required class in the **My Timeline** panel then select **Profile List Entry** to display the **List Entry** browser. This enables teachers to work on groups for whom they are responsible and select comments for each pupil/student.

Additional Resources:

Selecting Comments using List Entry in the *Selecting Comments* chapter of the *Managing Pupil/Student Profiles* handbook

Viewing Class Photographs

Right-click the required class or registration group in the **My Timeline** widget then select **Class Photographs** from the pop-up menu to display the **Class Photo** dialog. This option is particularly useful for supply staff or new teachers, because it displays photographs of all the pupil/students in the selected class (if pupil/student photographs are recorded in SIMS).

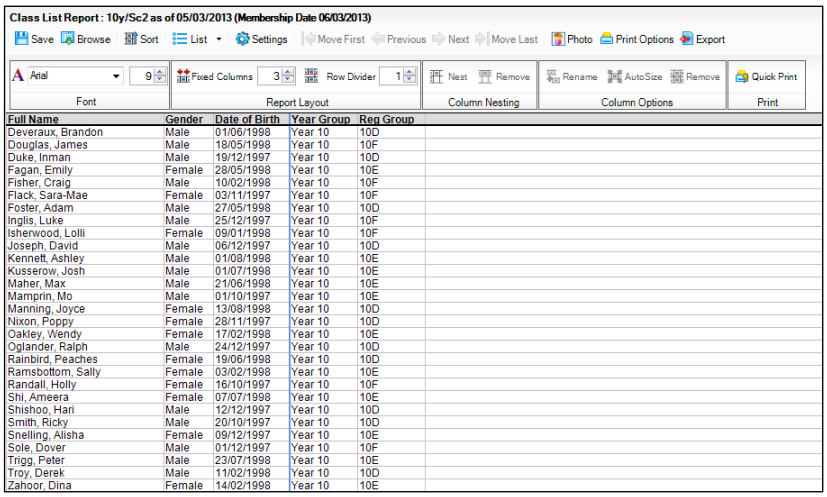


The Click for photographers hyperlink opens a web page on the Capita SIMS website (http://www.capita-sims.co.uk/our-partners/accredited-school-photographers), which contains information about accredited school photographers.

Click the **Print** button to print the photographs or the **OK** button to return to the SIMS **Home Page**.

Generating a Class List Report

Right-click the required class or registration group in the **My Timeline** widget then select **Class List Report** from the pop-up menu to display the **Class List Report** page or the **Registration Group List** page (depending on the type of class selected), which displays the members of the selected class. A range of additional functionality is available.



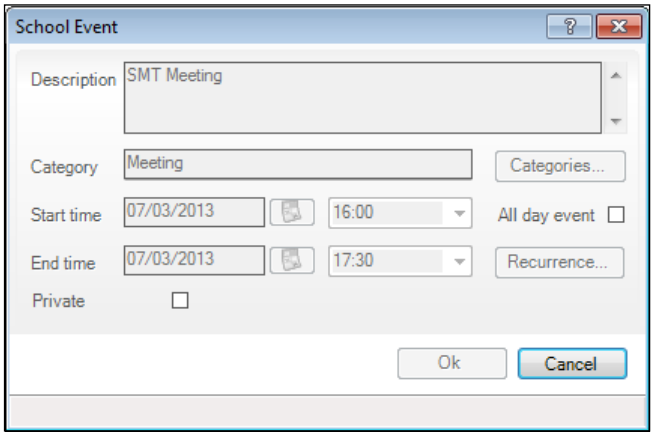
Full Name	Gender	Date of Birth	Year Group	Reg Group
Deveraux, Brandon	Male	01/06/1998	Year 10	10D
Douglas, James	Male	18/05/1998	Year 10	10F
Duke, Inman	Male	19/12/1997	Year 10	10D
Fagan, Emily	Female	28/05/1998	Year 10	10E
Fisher, Craig	Male	10/02/1998	Year 10	10F
Flack, Sara-Mae	Female	03/11/1997	Year 10	10F
Foster, Adam	Male	27/05/1998	Year 10	10D
Inglis, Luke	Male	25/12/1997	Year 10	10F
Isherwood, Lolli	Female	09/01/1998	Year 10	10F
Joseph, David	Male	06/12/1997	Year 10	10D
Kennett, Ashley	Male	01/08/1998	Year 10	10E
Kusserow, Josh	Male	01/07/1998	Year 10	10E
Maher, Max	Male	21/06/1998	Year 10	10E
Mamprin, Mo	Male	01/10/1997	Year 10	10E
Manning, Joyce	Female	13/08/1998	Year 10	10D
Nixon, Poppy	Female	28/11/1997	Year 10	10D
Oakley, Wendy	Female	17/02/1998	Year 10	10E
Oglander, Ralph	Male	24/12/1997	Year 10	10D
Rainbird, Peaches	Female	19/06/1998	Year 10	10D
Ramsbottom, Sally	Female	03/02/1998	Year 10	10E
Randall, Holly	Female	16/10/1997	Year 10	10F
Shi, Ameera	Female	07/07/1998	Year 10	10E
Shishoo, Hari	Male	12/12/1997	Year 10	10D
Smith, Ricky	Male	20/10/1997	Year 10	10D
Snelling, Alisha	Female	09/12/1997	Year 10	10E
Sole, Dover	Male	01/12/1997	Year 10	10F
Trigg, Peter	Male	23/07/1998	Year 10	10E
Troy, Derek	Male	11/02/1998	Year 10	10D
Zahoor, Dina	Female	14/02/1998	Year 10	10E

Additional Resources:

Running the Class List Report in the *Producing Student List Reports* chapter of the *Producing Student List, Student Analysis and Timetable Reports* handbook

Viewing Event Details

Right-click the required class or registration group in the **My Timeline** widget then select **Show Event** from the pop-up menu to display the **School Event** dialog, which displays details of the recorded event. The information is displayed in read-only format.



Click the **Cancel** button to return to the SIMS **Home Page**.

Viewing Detention Details

Right-click the required class or registration group in the **My Timeline** widget then select **Show Detention** from the pop-up menu to display the **Detention Details** page, which displays the date and time of the detention session, the pupil/students who are scheduled to attend, any linked activities, etc.

Additional Resources:

Recording Detentions chapter of the *Managing Pupil/Students* handbook

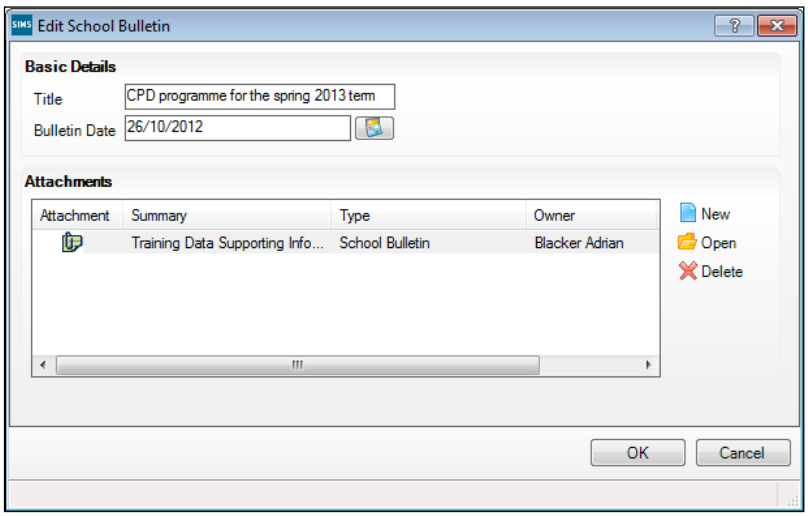
Viewing the School Bulletins Panel

School bulletins can be published by users with School Administrator or Administrative Assistant permissions. Once published, they can be opened and viewed by all SIMS users (please see *Adding a School Bulletin* on page *17*).

Any published bulletins are displayed in the **School Bulletins** widget on the SIMS **Home Page**.

*NOTE: If the number of published bulletins exceeds the number that can be displayed in the **School Bulletins** widget, the **More** hyperlink enables access to the additional bulletins in full screen mode.*

To access a bulletin from the minimised **School Bulletins** widget, click the name of the bulletin to display the **Edit School Bulletin** dialog. To access a bulletin from the maximised view of the **School Bulletins** widget, highlight the required bulletin then click the **Open** button to display the same dialog.



The **Title** of the bulletin and the **Bulletin Date** are displayed in the **Basic Details** panel.

Any **Attachments** to the bulletin are displayed in the bottom panel.

For full instruction on adding, opening, viewing and deleting attachments, please refer to *Attaching a New Note/Document* in the *Using the Pupil/Student Links Panel* chapter of the *Managing Pupil/Students* handbook.

Adding a School Bulletin

This section is applicable only to users with School Administrator and Administration Assistant permissions.

If your school produces a weekly bulletin of forthcoming events, reminders to staff, etc. it can be posted to the **School Bulletins** widget on the **Home Page** of all SIMS users. This is a convenient method of providing information to all your staff.

1. Click the **Options** button then select **Add new** from the pop-up menu to display the **School Event** dialog.

Options button

2. Enter the **Title** of the bulletin and a **Bulletin Date** in the **Basic Details** panel.

   For full instruction on adding, opening, viewing and deleting attachments, please refer to *Attaching a New Note/Document* in the *Using the Pupil/Student Links Panel* chapter of the *Managing Pupil/Students* handbook.

Removing a School Bulletin

This section is applicable only to users with School Administrator and Administration Assistant permissions.

School bulletins can be removed from the SIMS **Home Page** if they are no longer relevant or have been added in error.

> *NOTE: If a bulletin is removed, any associated documents remain on the Document Management Server.*

1. Maximise the **School Bulletins** widget to full screen mode.
2. Highlight the bulletin you wish to delete then click the **Delete** button.
3. Restore the panel to minimised view and return to the SIMS **Home Page**.

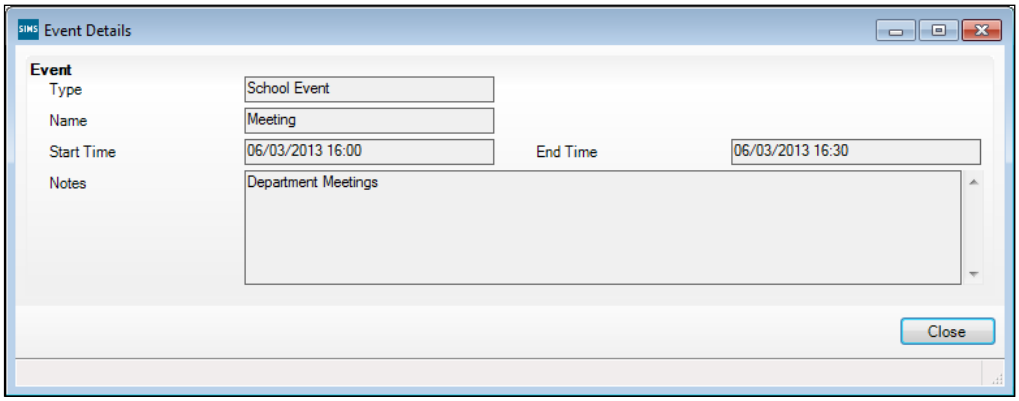
Viewing the School Diary

The School Diary is used to record and display any school events that occur during the course of the academic year. These might include school trips, training days, staff meetings, parent consultation evenings, etc.

Any school events are displayed in the **School Diary** widget on the SIMS **Home Page**.

> *NOTES: The School Diary can also be accessed via the **Options** button in the **My Timeline** widget and via **Focus | School | School Diary**.*
>
> *If the number of school events exceeds the number that can be displayed in the **School Diary** widget, the **More** hyperlink enables access to the additional events in full screen mode.*

1. To access a school event from the minimised **School Diary** widget, click the name of the event to display the **Event Details** dialog. To access an event from the maximised view of the **School Diary** widget, highlight the required event then click the **Open** button to display the same dialog.



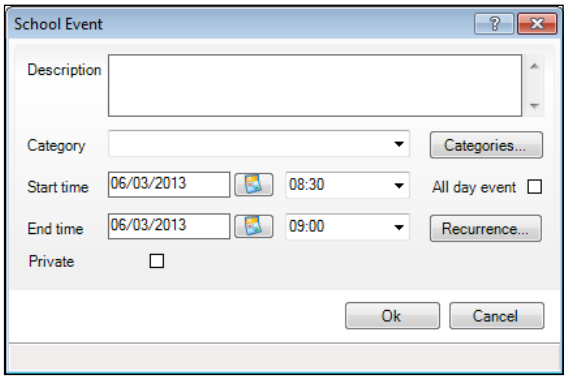
The event details are displayed in read-only format.

2. Click the **Close** button to return to the SIMS **Home Page**.

Adding a School Diary Event

1. Click the **Options** button then select **Add new** from the pop-up menu to display the **School Event** dialog.

Options button



2. Enter a **Description** for the event. This text is displayed in the School Diary.
3. Select an appropriate event **Category** from the drop-down list.

> *NOTE: New categories can be created, if required.*

4. If the event is scheduled to last for an entire day, select the **All day event** check box. This disables the time drop-down lists.
5. Specify the **Start time** for the event by entering the required date (this defaults to today's date) or click the **Calendar** button then select the required date. Select the required time from the drop-down list. The time element is not available for an all day event.

6. Specify the **End time** for the event by entering the required date (this defaults to today's date) or click the **Calendar** button then select the required date. Select the required time from the drop-down list. The time element is not available for an all day event.

   Recurring events can be set up by clicking the **Recurrence** button to display the **Event Recurrence** dialog. For more information, please refer to the *Setting Up the School Diary* chapter of the *Setting Up and Administering SIMS* handbook

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

8. Click the **OK** button to save the event.

> *NOTE: Once a school event has been added, it can be deleted only when the school diary is accessed via **Focus | School | School Diary**.*

Additional Resources:

Setting Up the School Diary chapter of the *Setting Up and Administering SIMS* handbook

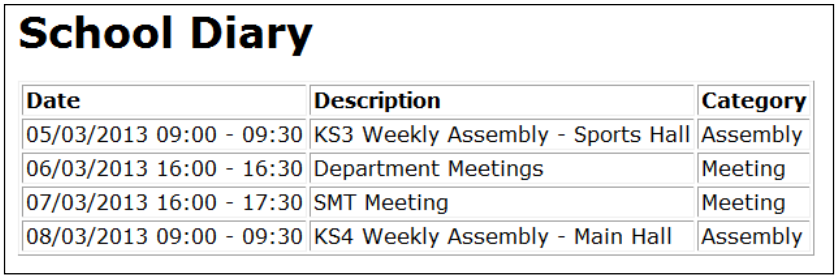
Printing the School Diary

The content of the **School Diary** widget can be printed.

The printed output produces the view of the **School Diary** widget displayed on-screen at the time of printing. Therefore, you should refresh the content of the **School Diary** widget prior to printing (please see *Refreshing the Content of the School Diary Widget* on page *20*).

1. Click the **Options** button then select **Print** from the pop-up menu to display the diary in your web browser.

Options button



School Diary

Date	Description	Category
05/03/2013 09:00 - 09:30	KS3 Weekly Assembly - Sports Hall	Assembly
06/03/2013 16:00 - 16:30	Department Meetings	Meeting
07/03/2013 16:00 - 17:30	SMT Meeting	Meeting
08/03/2013 09:00 - 09:30	KS4 Weekly Assembly - Main Hall	Assembly

2. Click the **Print** button to print the diary events.

Refreshing the Content of the School Diary Widget

Many of the widgets on the SIMS **Home Page** can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **School Diary** widget manually.

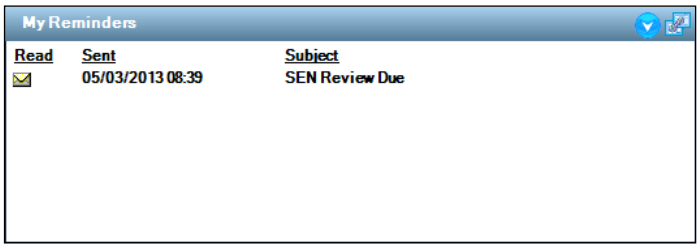
Click the **Refresh** button in the **School Diary** widget to refresh its content.

Refresh button

Viewing My Reminders

SIMS can be configured to generate a reminder to advise users of forthcoming deadlines, e.g. free school meal eligibility, medical events, SEN reviews, etc.

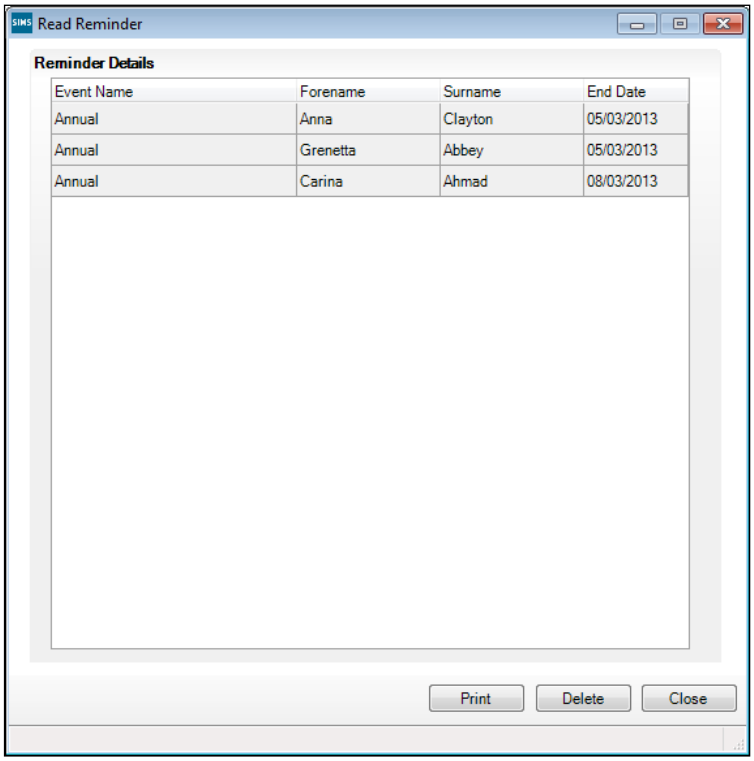
Each SIMS user can specify the reminders they want to set and the number of days prior to the event occurring that the reminder should be generated and sent to the applicable member(s) of staff. The reminders are displayed in the **My Reminders** widget on the SIMS **Home Page**. The date the reminder was **Sent**, the **Subject** line and the **Read** status is displayed. In the following example, a SEN review reminder has been sent.



*NOTE: If the number of reminders exceeds the number that can be displayed in the **My Reminders** widget, the **More** hyperlink enables access to the additional reminders in full screen mode.*

A maximum of 50 reminders can be displayed on your Home Page. Once this limit has been reached, you are prompted to delete existing reminders.

1. To view a reminder from the minimised **My Reminders** widget, click it to display the **Read Reminder** dialog. To access a bulletin from the maximised view of the **My Reminders** widget, highlight the required reminder then click the **Open** button to display the same dialog.

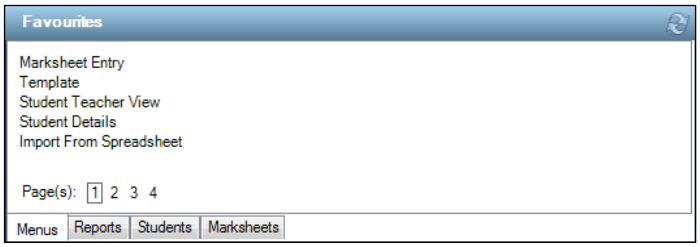


When used in conjunction with the **Subject** of the reminder displayed in the **My Reminders** panel, the **Event Name** informs you of the purpose of the reminder.

2. Double-click a summary line in the dialog to navigate to the area in SIMS and view the full record. In the case of the SEN review reminder used in this example, the **Student SEN details** page is displayed.
3. Close the detail page to return to the SIMS **Home Page**.
4. With the **Read Reminder** dialog open, you can **Print** or **Delete** the reminder.
5. Click the **Close** button to retain the reminder and to return to the SIMS **Home Page**.

Viewing My Favourites

To facilitate navigation in SIMS to areas that you visit most frequently, SIMS monitors and records the most commonly accessed functional areas and provides them as shortcuts via the **Favourites** widget.



The following categories of functionality in SIMS can be added as shortcuts automatically via the **Favourites** widget:

- Menus (added to the **Menus** tab automatically when you open a menu route in SIMS)
- Reports (added to the **Reports** tab automatically when you drag a SIMS pre-defined report to the **Favourites** folder via **Reports | Run Report**)
- Students (added to the **Students** tab automatically when you open a pupil/student's details via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** then click the **Favourites** button)
- Marksheets (added to the **Marksheets** tab automatically when you open a marksheet via **Focus | Assessment | Marksheet Entry** then click the **Favourites** button).

Each of the tabs located at the bottom of the **Favourites** widget can display a maximum of five hyperlinks to functional areas in SIMS. Each tab can contain up to four pages, meaning that a maximum of 20 hyperlinks for each category can be stored. To view additional pages, click the appropriate **Page(s)** link. In the previous example, the **Menus** tab displays five hyperlinks on page 1 and provides four pages of links.

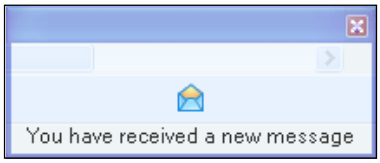
1. To open a shortcut, select the required tab (e.g. **Menus**) and click the required page (using the **Page(s)** links).
2. Either click the required shortcut or right-click it then select **Open '<shortcut name>'** to display the functional area.

   The history of your navigation in SIMS can be removed by right-clicking any shortcut then selecting **Reset Counters** from the pop-up menu.

Viewing My Messages

All messages that you have received are displayed in the **My Messages** widget on the SIMS **Home Page**. This includes system messages if a message that you have sent to another SIMS user cannot be delivered. The default refresh rate can be defined as part of the widget configuration process (please see *Configuring the My Messages Panel* on page *77*).

By default, messages sent to you with a high priority setting are displayed in a pop-up window at the bottom right-hand corner of the screen, regardless of your location in SIMS.



In addition, an alarm is played by default when a high priority message is received.

1. Click a message in the **My Messages** widget to display its details in the **Read Message** dialog.
2. **Print** or **Delete** the message, if required.
3. Click the **Close** button to retain the message and to return to the SIMS **Home Page**.

More Information:
Sending General Messages on page *23*
Viewing Sent Messages on page *26*
Deleting Sent Messages on page *27*
Responding to Messages on page *28*
Adjusting the Message Options for High Priority Messages on page *30*

Sending General Messages

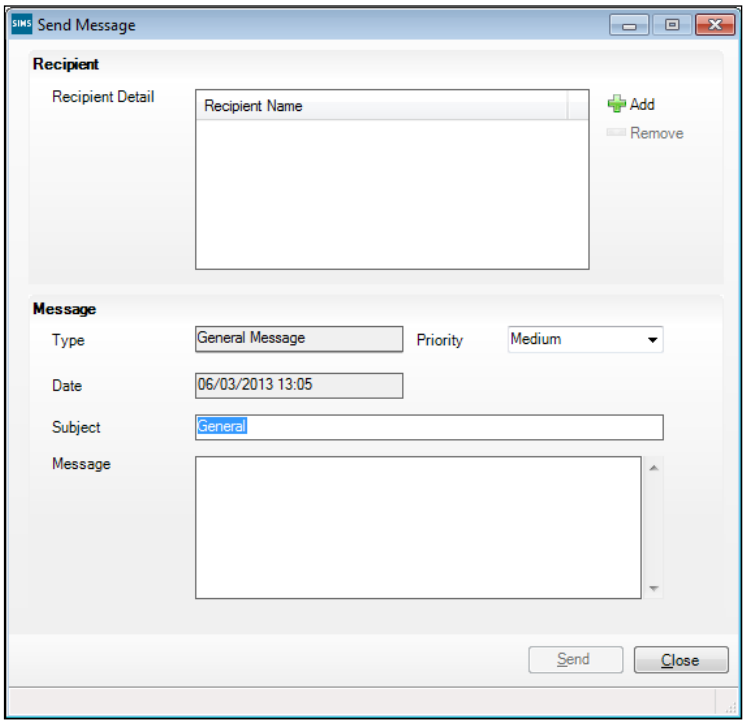
Messages can be sent to one or more SIMS users, perhaps to inform them of a forthcoming event.

The type of message sent depends on the subject matter. For example, to send a message about a particular pupil/student, you can send a **Student General Message** from the **Links** panel in SIMS. Another type of message that can be sent is a **General** message. This type of message is not subject-specific, and should be used if existing message types (from the **Type** drop-down list in the **Message** panel of the **Send Message** dialog) are not appropriate. For example, you might want to send a message informing all heads of year of a forthcoming visit from a school inspector.

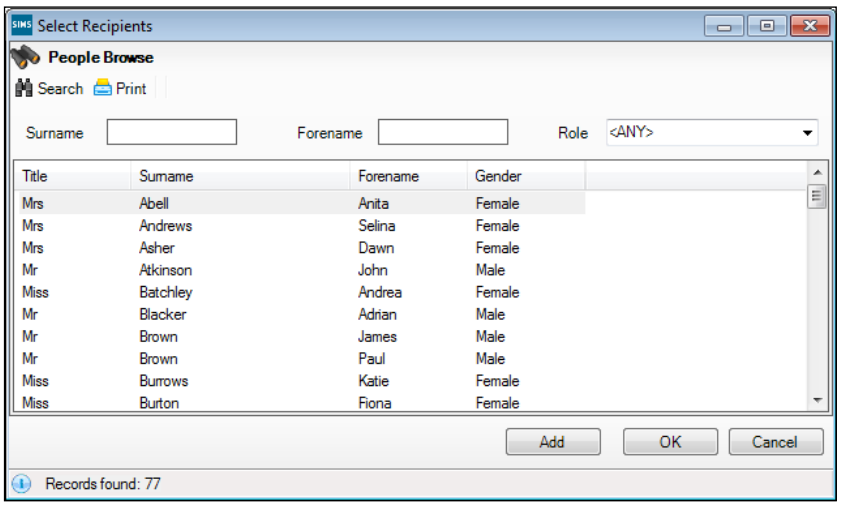
Once sent, the recipient can view messages in the **My Messages** panel of their Home Page.

1. Select **Focus | Alerts | General Messages** to display the **General Message** page.

2. Click the **New** button to display the **Send Message** dialog.

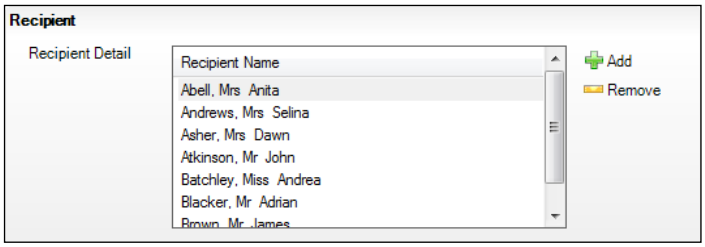


3. Click the **Add** button in the **Recipient** panel to display the **Select Recipients** browser.



4. Search for then highlight the required recipient (multiple recipients can be selected by holding down the **Ctrl** key and clicking the required names).
5. Click the **Add** button to add each person (or group of people).
6. When you have added the required member(s) of staff, click the **OK** button. The selected members of staff are displayed in the **Recipient** panel.

*NOTE: To remove a member of staff, highlight their name in the **Recipient** panel then click the **Remove** button.*



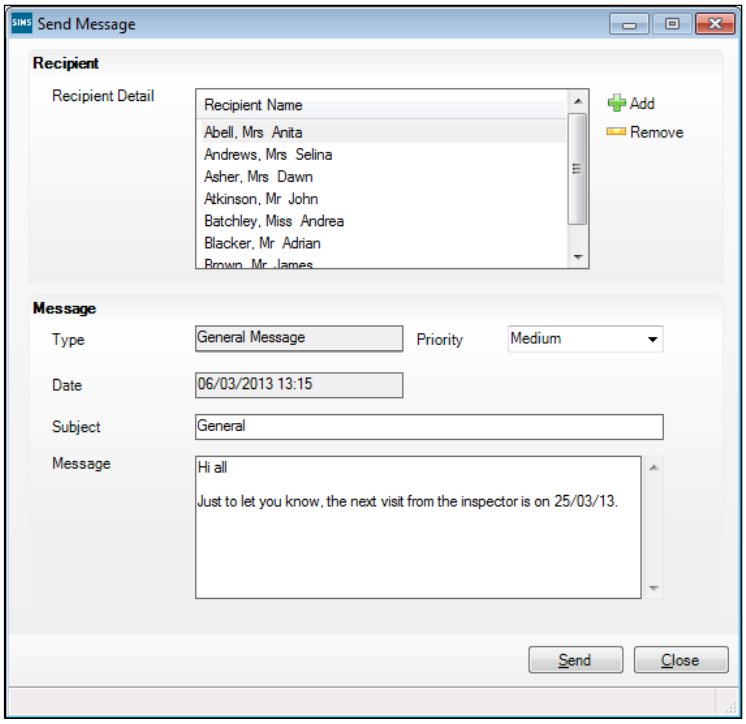
In the **Message** panel, the **Type** field displays **General Message** and cannot be edited.

7. Select the **Priority** of the message from the drop-down list. High priority messages are displayed in a pop-up window in the bottom right-hand corner of the recipient's screen, if this setting has been activated (please see *Adjusting the Message Options for High Priority Messages* on page *30*).

   The **Date** field is populated from a combination of the system date and time.

8. The **Subject** field displays **General** by default, but can be edited if required.

9. In the **Message** field, enter the message text that you want to send to the selected member(s) of staff.



When the required recipients have been selected and the **Message** field is populated, the **Send** button becomes available. To cancel the sending of the message, click the **Close** button.

10. Click the **Send** button to send the message. The message is displayed in the **My Messages** panel of the intended recipient(s).

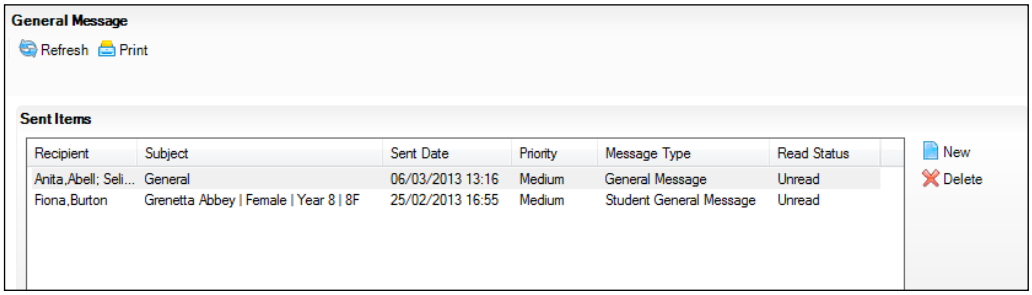
*NOTE: All sent messages are stored in the **Sent Items** panel of the **General Message** page until they are deleted.*

More Information:
Deleting Sent Messages on page *27*

Viewing Sent Messages

All sent messages are stored in the **Sent Items** panel of the **General Message** page until they are deleted. It is possible to view and print the details of these messages.

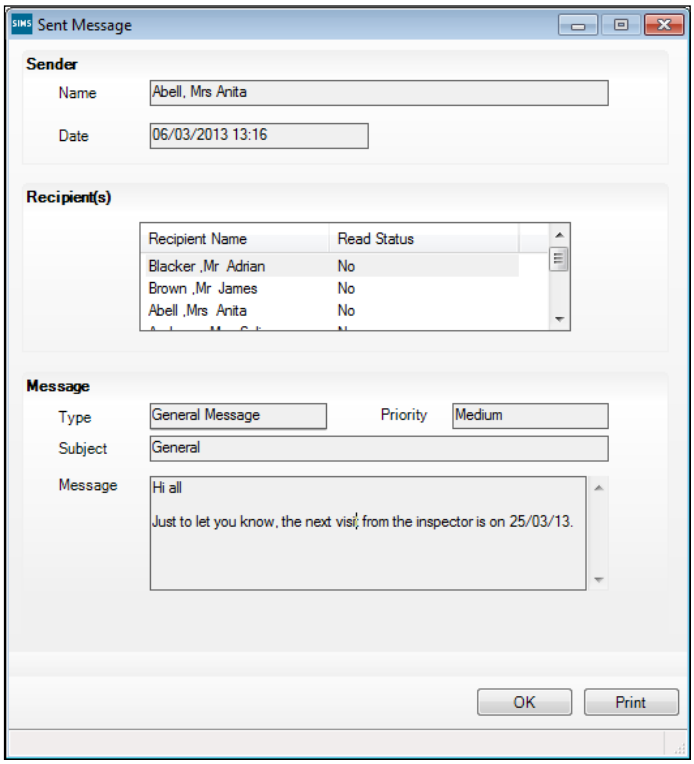
1. Select **Focus | Alerts | General Messages** to display the **General Message** page.



The **Sent Items** panel displays all of the messages that you have sent, which you have elected to retain.

The **Read Status** column indicates if the message is currently **Unread**, **Read** (by some, but not all of the recipients) or **Read By All**.

2. Double-click a message to view its details in the **Sent Message** dialog.



The **Recipient(s)** panel displays all recipients of the message. The **Read Status** in this panel displays **Yes** if the recipient has read your message.

3. To print the message, click the **Print** button. Click the **OK** button to return to the **General Message** page.
4. To print all sent messages, click the **Print** button on the **General Message** page.

Deleting Sent Messages

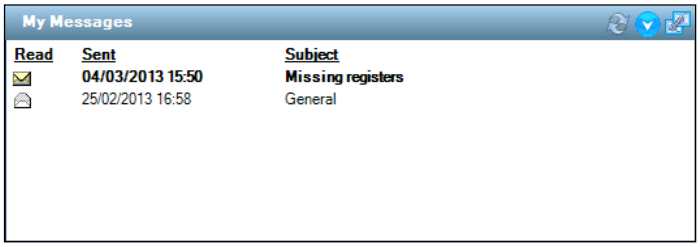
Any sent messages that you no longer need can be deleted.

> ***WARNING:*** *Deleted sent messages are removed permanently and there is no restore function. Any user to whom you have sent the message can still access it via the* ***My Messages*** *panel on their Home Page until they elect to delete it.*

1. Select **Focus | Alerts | General Messages** to display the **General Message** page.
2. Highlight the required message(s) then click the **Delete** button. Multiple messages can be selected by holding the **Ctrl** key then clicking each message you wish to delete.
3. Confirm the deletion by clicking the **Yes** button.

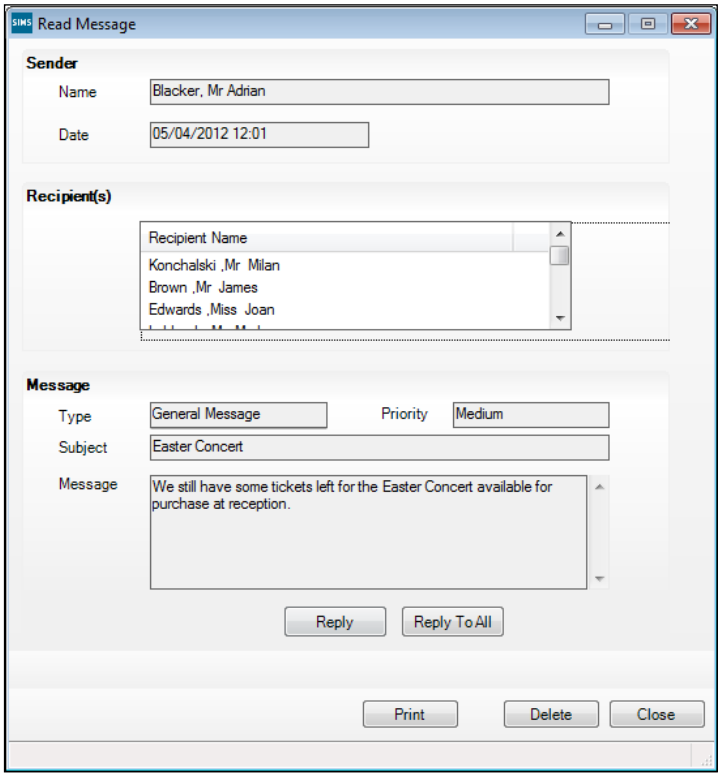
Responding to Messages

The six most recent messages that you have received are displayed in the **My Messages** widget on the SIMS **Home Page**.



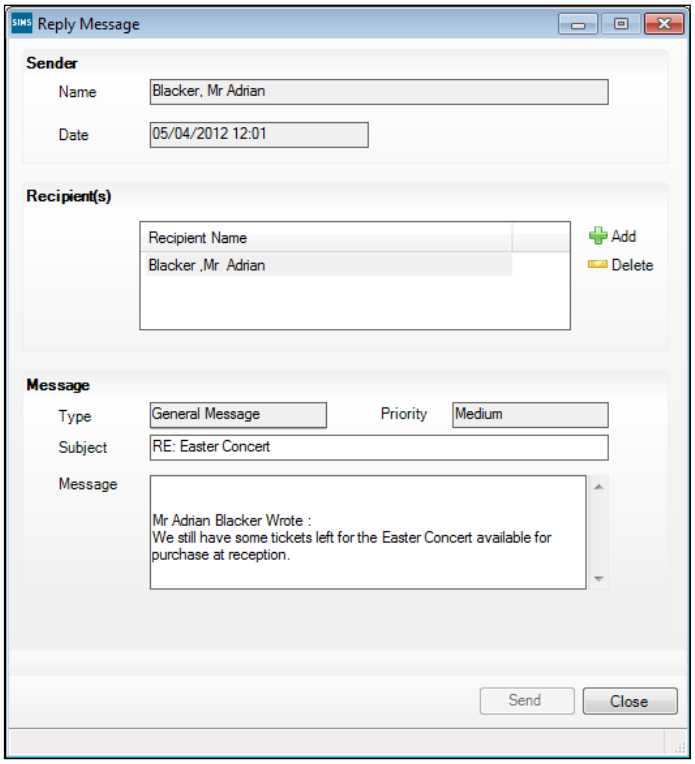
*NOTE: If the number of messages in your inbox exceeds the number that can be displayed in the **My Messages** widget, the **More** hyperlink enables access to the additional messages in full screen mode.*

1. Click anywhere on the required message line to display the content of the message in the **Read Message** dialog.

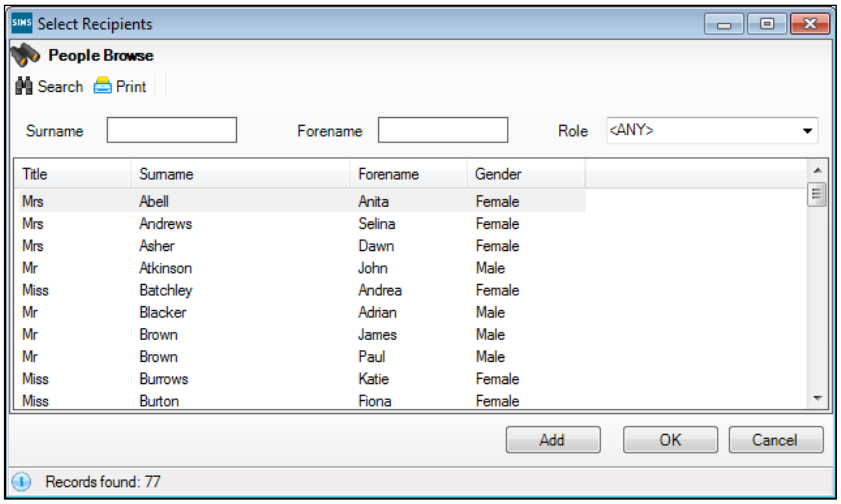


*NOTE: **Print** or **Delete** the message as required or click the **Close** button to retain the message and return to the SIMS **Home Page**.*

2. To respond only to the sender of the message, click the **Reply** button to display the **Reply Message** dialog. Alternatively, click the **Reply To All** button to respond to all recipients of the original message, including the sender.



3. Click the **Add** button in the **Recipient(s)** panel to display the **Select Recipients** browser.



4. Search for then select the required recipient (multiple recipients can be selected by holding down the **Ctrl** key and clicking the required names).
5. Click the **Add** button to add each person (or group of people).

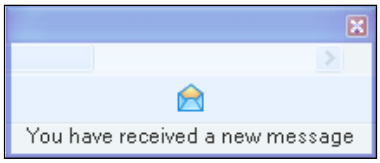
6. When you have added the necessary members of staff, click the **OK** button. The selected members of staff are displayed in the **Recipient** panel.

> *NOTE: To remove a member of staff, highlight them in the **Recipient** panel and click the **Remove** button.*

7. Enter your reply in the **Message** panel and click the **Send** button to send the message.

Adjusting the Message Options for High Priority Messages

Any messages sent to you by other SIMS users are displayed in the **My Messages** panel on the SIMS **Home Page**. By default, messages sent to you with a high priority setting are displayed in a pop-up window at the bottom right-hand corner of the screen, regardless of your location in SIMS.



In addition, an alarm is played by default when a high priority message is received.

> *NOTE: Each SIMS user can define their own settings for when they receive a high priority message. The settings defined apply only to that user and only to messages received by that user. Therefore, if you send a high priority message to another SIMS user, the pop-up window displays on their screen only if the recipient has defined this setting.*

1. Select **Tools | Setup Message Options** to display the **Setup Message Options** page.

By default, all the options are selected and the pop-up alert is displayed for 30 seconds

2. Deselect the **Display an alert when a new message is received** check box to de-activate the pop-up display for high priority messages.

   By default, the **Duration pop-up alert will be displayed** for **30 seconds**. This determines the period of time that the pop-up message remains on-screen.

3. To amend the length of time that the pop-up message is displayed, enter the required time, in seconds.
4. Deselect the **Play a sound alarm** check box to de-activate the sound prompt when the pop-up alert is displayed.

*NOTE: To receive the pop-up alerts for high priority messages, the My Messages widget must be displayed on their **Home Page**.*

Refreshing the Content of the My Messages Widget

Many of the widgets on the SIMS Home Page can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **My Messages** widget manually.

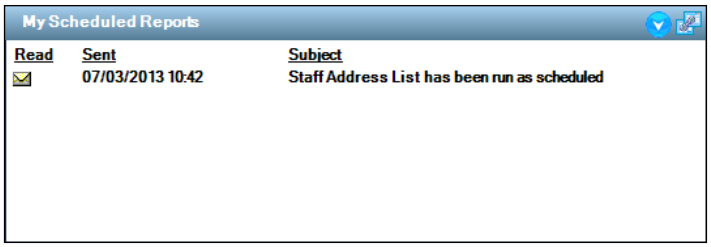
Click the **Refresh** button in the **My Messages** widget to refresh its content.

Refresh button

Viewing My Scheduled Reports

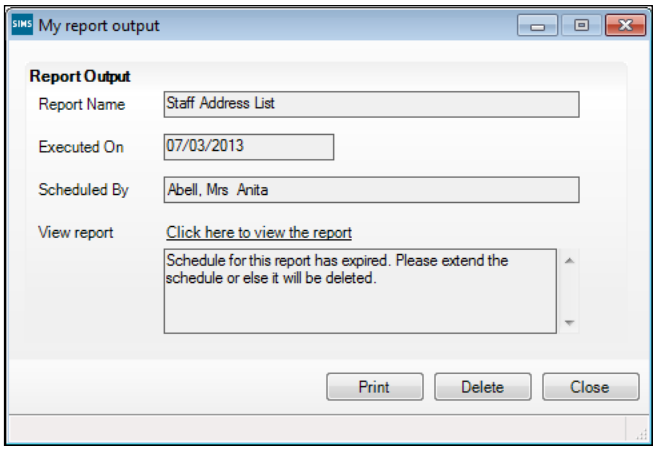
The **My Scheduled Reports** widget is used to display any reports that you have scheduled to run automatically at specified times. For example, Heads of Year may want to produce behaviour reports on a daily basis to keep track of any behaviour incidents. It is possible to schedule these reports to run for yourself and on behalf of other SIMS users.

Once generated, the reports are stored on the Document Management Server (DMS) and a link to the report is displayed in the **My Scheduled Reports** widget on the SIMS **Home Page**.



*NOTE: If the number of scheduled reports that have been run exceeds the number that can be displayed in the **My Scheduled Reports** widget, the **More** hyperlink enables access to the additional reports in full screen mode.*

To access a report from the minimised **My Scheduled Reports** widget, click the name of the report to display the **My report output** dialog. To access a report from the maximised view of the **My Scheduled Reports** widget, highlight the required report then click the **Open** button to display the same dialog.



The **Report Name** and the date the report was **Executed On** are displayed, together with the name of the user who scheduled the report (**Scheduled By**).

To view the report output, click the **Click here to view the report** hyperlink to open the application associated with the selected report format, from where it can be printed.

Click the **Print** button to print the information in the dialog, if required. The notification can be deleted from the **My Scheduled Report** widget by clicking the **Delete** button.

Click the **Close** button to return to the SIMS **Home Page**.

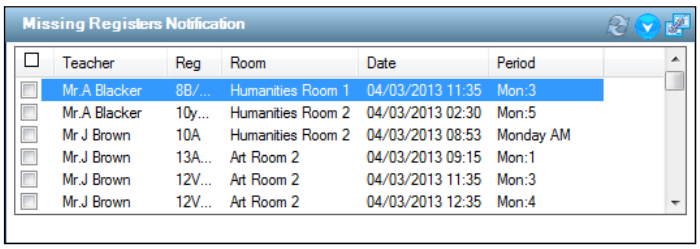
Additional Resources:

Running Scheduled Reports chapter of the *Designing and Running Reports* handbook

Viewing Missing Register Notifications

This section is applicable only to users with Attendance Manager permissions.

It is possible to display a list of registers that have not been completed within a specified number of minutes after a lesson or session starts. The period of time after which notifications will be displayed is defined as part of the widget configuration process (please see *Configuring the Missing Register Notification Panel* on page *78*). It is also possible to access the registers to complete missing marks, if required.



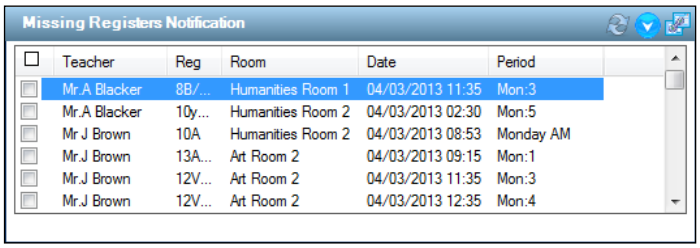
The **Missing Registers Notification** widget displays any registers that have not been completed after a defined period of time (e.g. 10 minutes after a lesson or session starts). Any missing or incomplete register is displayed in this panel. The panel displays details of the registration tutor/class teacher, the session or lesson, the room, date and period.

This functionality enables a Head of Year (with Attendance Manager permissions), for example, to identify any sessions or lessons that have not had their registration taken within the required time period. The Head of Year can then send a message to all members of staff who have not yet completed their register.

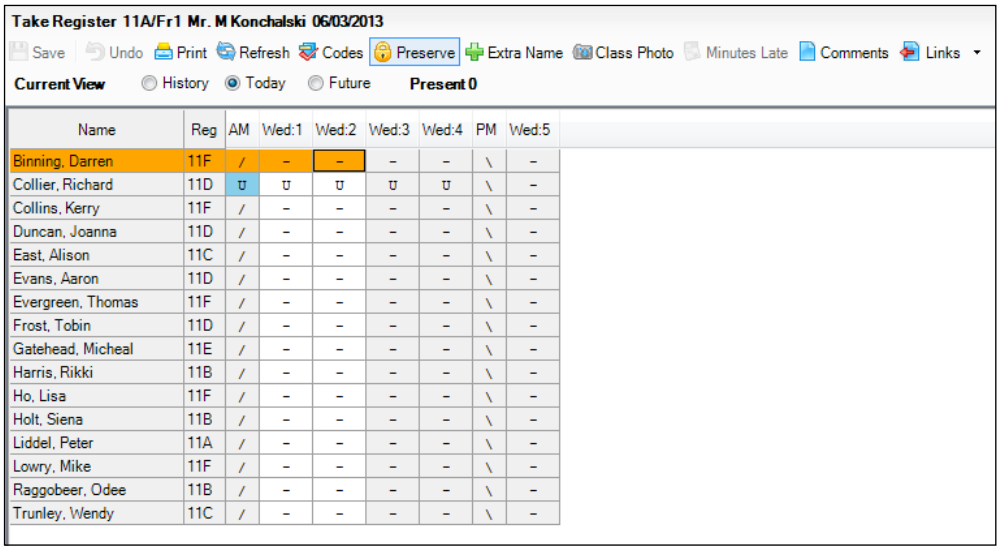
IMPORTANT NOTE: *By default, the content of the* ***Missing Registers Notification*** *panel is refreshed automatically by SIMS every ten minutes. This means that if missing register notifications are set to be sent ten minutes after a lesson or session starts, the delay before the* ***Missing Registers Notification*** *panel displays this information may be up to twenty minutes after the lesson or session starts. It is important to bear this in mind when setting the notification delay.*

Opening a Register and Entering Marks

It is possible to open the registers displayed in the **Missing Registers Notification** widget, perhaps if you want to complete missing marks.



Double-click the required register in the **Missing Registers Notification** widget to display the **Take Register** page.



Additional Resources:

Taking a Register chapter in the *Managing Pupil/Student Attendance* handbook
Taking a Register chapter in the *Monitoring Session and Lesson Attendance* handbook

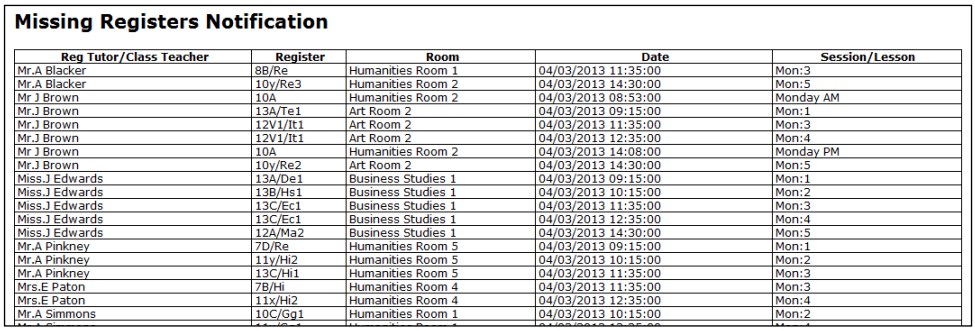
Printing Missing Register Notifications

The content of the **Missing Registers Notification** widget can be printed.

The printed output produces the view of the **Missing Registers Notification** widget displayed on-screen at the time of printing. Therefore, you should refresh the content of the **Missing Registers Notifications** widget prior to printing.

1. Click the **Options** button then select **Print** from the pop-up menu to display the notifications in your web browser.

Options button



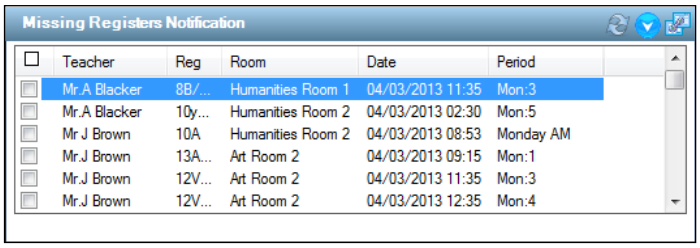
2. Click the **Print** button to print the notifications.

Sending a Missing Register Notification Message

This section is applicable only to users with Attendance Manager permissions.

The **Missing Registers Notification** widget enables a Head of Year (with Attendance Manager permissions), for example, to identify any sessions or lessons that have not had their register taken within the required time period. The Head of Year can then send a high priority message to all members of staff who have not yet completed their register, prompting them to do so.

The period of time after which notifications will be displayed in the **Missing Registers Notification** widget is defined as part of the widget configuration process (please see *Configuring the Missing Register Notification Panel* on page *78*).



1. Select the check box relating to the register(s) for which you want to send the notification message. Alternatively, select the check box in the header row to select all missing registers displayed in the **Missing Registers Notification** widget.
2. Click the **Options** button then select **Send Message** from the pop-up menu to display the notifications in your web browser.

Options button

If the message has been sent successfully, a message is displayed at the bottom of the **Missing Registers Notification** widget.

The recipient can view the notification via the **My Messages** widget on the SIMS **Home Page**. By default, messages sent to you with a high priority setting are displayed in a pop-up window at the bottom right-hand corner of the screen, regardless of your location in SIMS.

In addition, an alarm is played by default when a high priority message is received.

> *NOTE: Each SIMS user can define their own settings for when they receive a high priority message. The settings defined apply only to that user and only to messages received by that user. Therefore, if you send a high priority message to another SIMS user, the pop-up window displays on their screen only if the recipient has defined this setting.*

More Information:
Adjusting the Message Options for High Priority Messages on page *30*

Refreshing the Content of the Missing Registers Notification Widget

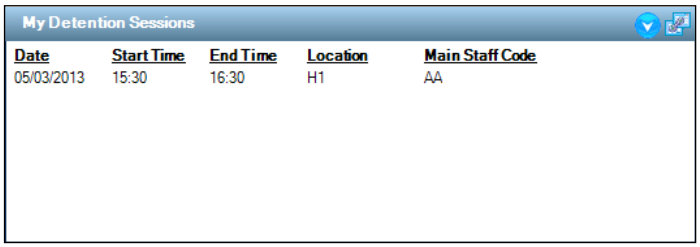
Many of the widgets on the SIMS **Home Page** can be configured to refresh the data after a specified amount of time. However it is possible to refresh the **Missing Registers Notifications** widget manually.

Click the **Refresh** button in the **Missing Registers Notifications** widget to refresh its content.

Refresh button

Viewing My Detention Sessions

Any detention sessions for which you are the main staff member assigned are displayed in the **My Detention Sessions** widget. The period over which data is displayed (e.g. **Today**, **Current Week**, etc.) is defined as part of the widget configuration process (please see *Configuring the My Detention Sessions Panel* on page *79*).



Click the required detention session to display its details on the **Detention Details** page.

Additional Resources:

Adding/Editing Detentions in the *Recording Detentions* chapter of the *Managing Pupil/Students* handbook

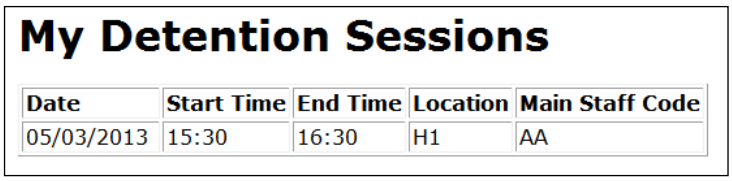
Printing My Detention Sessions

The content of the **My Detention Sessions** widget can be printed.

The printed output produces the view of the **My Detention Sessions** widget displayed on-screen at the time of printing. Therefore, you should refresh the content of the **My Detention Sessions** widget and ensure the correct scope (e.g. **Today**, **Current Week**, etc.) is selected prior to printing (please see *Refreshing the Content of the School Diary Widget* on page *20*).

1. Click the **Options** button then select **Print** from the pop-up menu to display the detention sessions in your web browser.

Options button

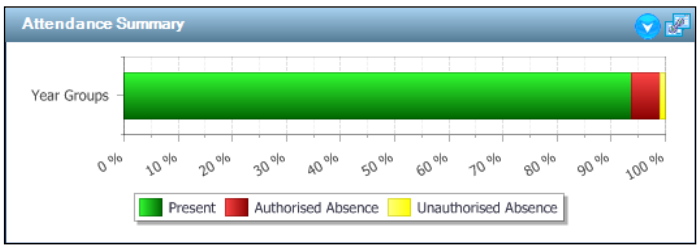


2. Click the **Print** button to print the detention sessions.

Viewing the Attendance Summary

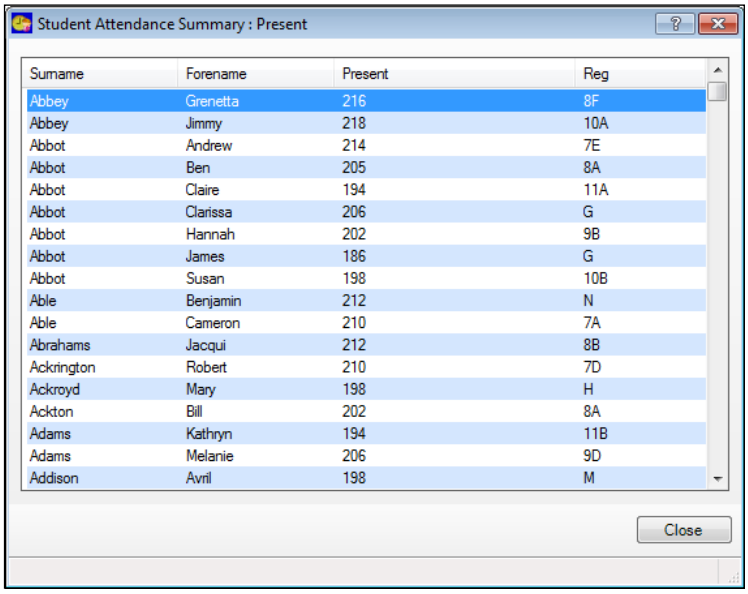
A summary of pupil/student attendance can be displayed in the **Attendance Summary** widget on the SIMS **Home Page**, enabling the monitoring of their progress. The attendance information displayed is defined as part of the widget configuration process (please see *Configuring the Attendance Summary Panel* on page *80*).

The following example shows the **Attendance Summary** widget when all **Year Groups** have been selected.



Pupil/student attendance for the selected group(s) over the course of the current academic year is displayed on a vertical bar chart. The legend beneath the chart displays the scope of the chart, which is the display of all **Present** marks, together with **Authorised** and **Unauthorised** absences. The horizontal axis displays the cumulative percentage of these marks, starting with a green bar (for present marks), a yellow bar (authorised absences) and a red bar (unauthorised absences).

Hover the mouse over the bar to display the number and percentage of sessions or lessons in each category. To view the data that makes up the present, authorised or unauthorised bars on the chart, double-click the required bar to display the **Student Attendance Summary** dialog. In the following graphic, the **Present** (green) bar was selected to display the **Student Attendance Summary: Present** dialog.



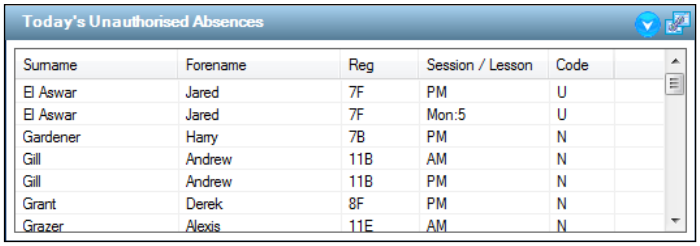
The number of present marks (or authorised or unauthorised absence marks, depending on the part of the bar chart that was selected) is displayed. You can drill down into the data further by right-clicking the required pupil/student then selecting **Student Teachers View** or **Student Attendance Summary** from the pop-up menu.

Additional Resources:

Configuring and Using the Student Teacher View mini guide
Displaying Marks chapter of the *Managing Pupil/Student Attendance* handbook
Displaying Marks chapter of the *Monitoring Session and Lesson Attendance* handbook

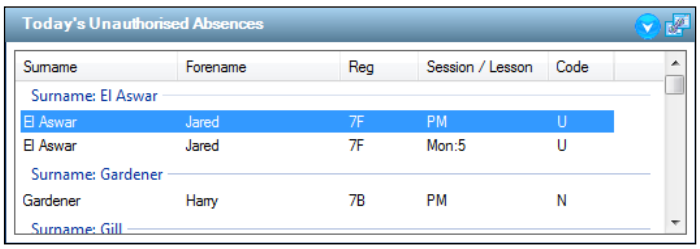
The data used to build the unauthorised absence part of the bar chart can be viewed by clicking the **Options** button then selecting **Toggle** from the drop-down menu.

Options button



The data displays unauthorised absences recorded for today only. The **Session / Lesson** for which an unexplained absence mark has been recorded and the actual mark recorded (**Code**) are displayed for each pupil/student. Where multiple session/lessons have been recorded for a pupil/student, a new line is displayed for each session/lesson.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Today's Unauthorised Absences** widget then select **Surname**, **Forename**, **Reg**, **Session / Lesson** or **Code** from the pop-up menu to display the content in the selected order.



Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.

IMPORTANT NOTES: *Approved educational activity marks are treated as a present mark in the* ***Attendance Summary*** *widget on the SIMS* ***Home Page****.*

If a mark is entered in Take Register for a future session or lesson, this is included in the figures in the ***Attendance Summary*** *widget.*

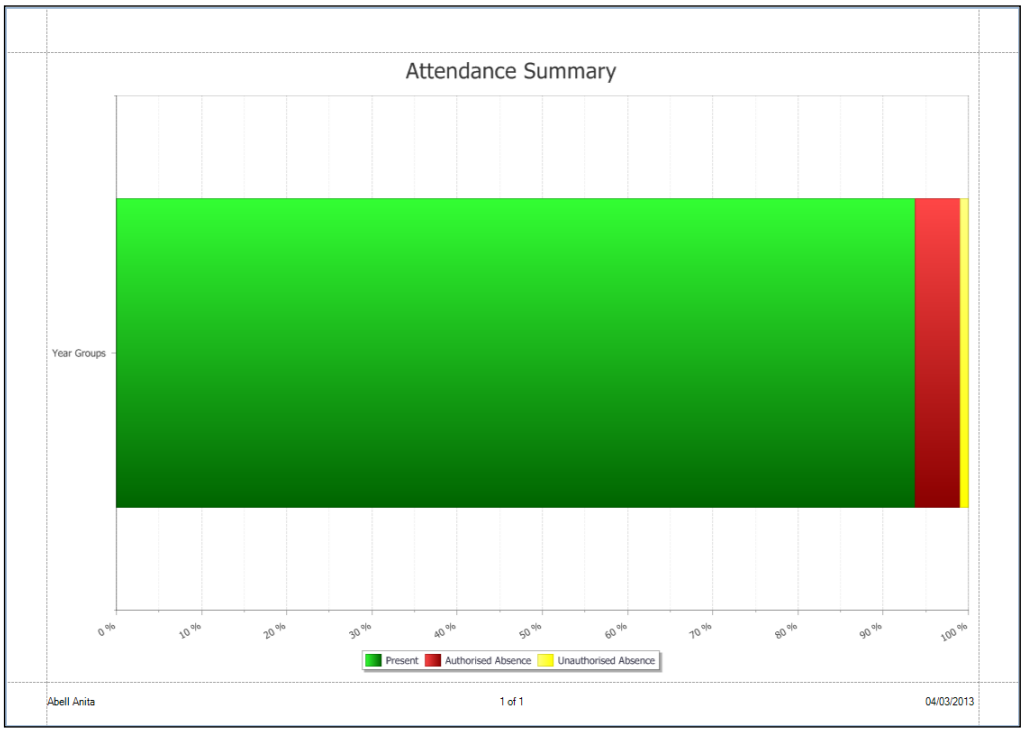
Printing the Attendance Summary

Two printed outputs are available from this widget. With the Attendance Summary displayed, the bar chart is printed. With Today's Unauthorised Absences displayed, the data is printed in surname then forename order, regardless of the display order on-screen.

Click the **Options** button then select **Print** from the pop-up menu to display the diary in your web browser, from where it can be printed.

Options button

Attendance Summary bar chart output:



Today's Unauthorised Absences output:

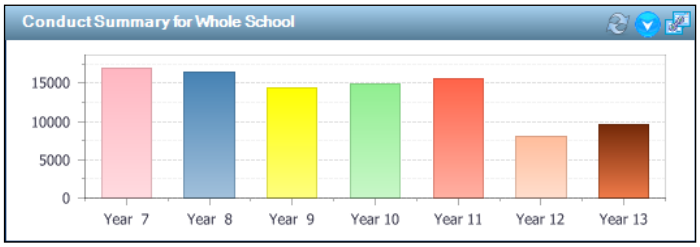
Attendance Summary

Surname	Forename	Reg. Group	Session / Lesson	Code
El Aswar	Jared	7F	PM	U
El Aswar	Jared	7F	Mon:5	U
Gardener	Harry	7B	PM	N
Gill	Andrew	11B	AM	N
Gill	Andrew	11B	PM	N
Grant	Derek	8F	PM	N
Grazer	Alexis	11E	AM	N
Handson	Emily	7F	PM	N
Harris	Stephanie	J	AM	N
Harris	Stephanie	J	PM	N
Hibberty	Fiona	7A	PM	N
Hotterly	Deborah	7C	AM	N
Hotterly	Deborah	7C	PM	N
Humphries	Robert	N	AM	N
Humphries	Robert	N	PM	N
Isaac	Smith	11B	AM	N
Leanord	Victoria	G	Mon:5	O
Leanord	Victoria	G	Mon:4	O
Leanord	Victoria	G	AM	O
Leanord	Victoria	G	PM	O
Leanord	Victoria	G	Mon:2	O
Leanord	Victoria	G	Mon:3	O
Mansoor	Khalid	11C	Mon:5	O
Mansoor	Khalid	11C	PM	O
McDonald	Cameron	9D	PM	O
McDonald	Cameron	9D	Mon:5	O
Perch	Penny	10D	Mon:5	U
Perch	Penny	10D	PM	U
Taaramae	Rein	9B	AM	U
Taaramae	Rein	9B	Mon:3	U
Taaramae	Rein	9B	Mon:4	U
Taaramae	Rein	9B	Mon:1	U
Taaramae	Rein	9B	Mon:2	U

Viewing the Conduct Summary

A summary of pupil/student conduct can be displayed in the **Conduct Summary** widget on the SIMS **Home Page**, enabling the monitoring of behaviour and achievement. The conduct information displayed, together with the period over which data is displayed (e.g. **Year to Date**, **Previous Week**, etc.), is defined as part of the widget configuration process (please see *Configuring the Conduct Summary Panel* on page *82*).

The previous example shows the **Conduct Summary** widget when the **Whole School** has been selected for the **Previous Term**.



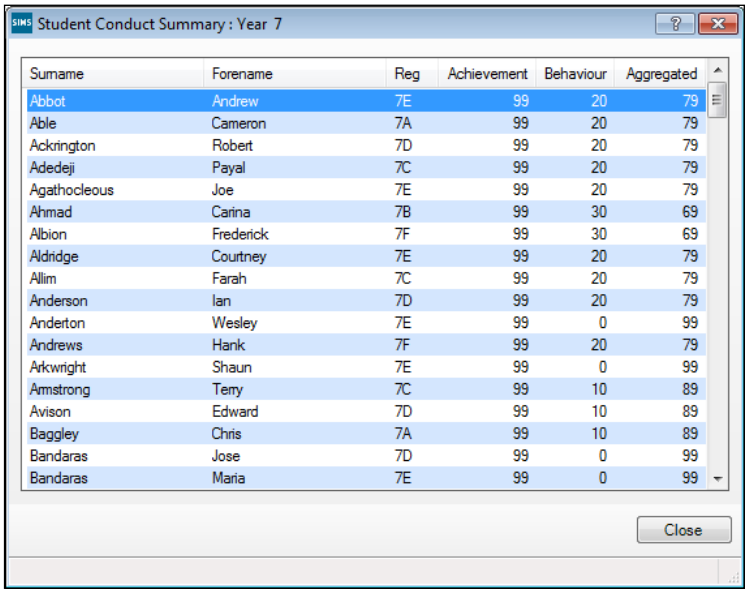
The data in the chart consists of the aggregate of the points awarded for behaviour incidents (awarded a negative points value) and achievements (awarded a positive points value). Where the points awarded for achievements exceeds the points awarded for behaviour incidents), this indicates generally positive conduct for the group and the bar is displayed above the horizontal axis (i.e. a points aggregate of greater than 0).

The scope of the **Conduct Summary** widget determines the style of the bar chart. In the previous graphic, the vertical axis starts at zero and the last marker is at 15000. All of the bars on the chart are within the range 0 to 15000 so this indicates generally positive conduct.

If the scope of the widget was reduced to display conduct for a single day (**Today** or **Previous Day**), one of the groups that you are monitoring (perhaps a specific registration group) might display a negative aggregate score (the points awarded for behaviour incidents exceeds the points awarded for achievements). Under these circumstances, the bar would be displayed below the horizontal axis (i.e. a points aggregate of less than 0) to indicate generally negative conduct.

Hover the mouse over a bar to display the number of conduct points for the selected group(s). The information displayed differs depending on the groups selected. For example, if you have chosen a **Whole School** view, hovering the mouse over a bar displays the aggregate conduct points for each year group. Hovering the mouse over a bar on the widget where you have chosen to display a single year group displays (in a secondary school) the aggregate conduct points for each registration group in the year.

To view the data that makes up a bar displayed in the widget, double-click the required bar to display the **Pupil** (or **Student**) **Conduct Summary** dialog. In the following graphic, the **Year 7** bar was selected to display the **Pupil** (or **Student**) **Conduct Summary: Year 7** dialog.

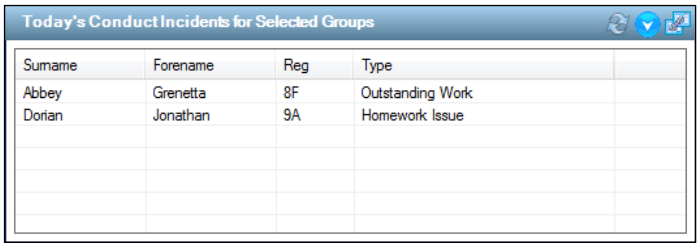


The number of **Achievement** and **Behaviour** points are displayed for each pupil/student in the selected group, together with an **Aggregated** figure. The **Aggregated** figure equals the number of **Achievement** points minus the number of **Behaviour** points.

You can drill down into the data further by right-clicking the required pupil/student then selecting **Student Teachers View** or **Student Conduct Summary** (which displays its details on the **Behaviour Management** page) from the pop-up menu. Alternatively, click the **Close** button to return to the SIMS **Home Page**.

The view of the data on the **Conduct Summary** widget can be toggled between a bar chart and a data table that displays **Today's Conduct Incidents for Selected Groups** (behaviour incidents and achievements) by clicking the **Options** button then selecting **Toggle** from the drop-down menu.

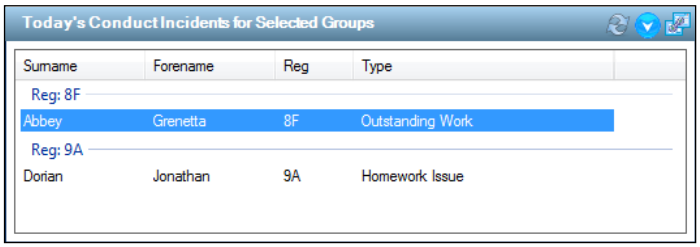
Options button



The data displays pupil/student conduct information recorded today only. The **Type** of conduct that has been recorded is displayed for each pupil/student. Where multiple conduct details have been recorded for a pupil/student, a new line is displayed for each conduct item.

To view further information about a conduct incident, double-click the required item to display the **Pupil/Student Teacher View** page.

This information can be viewed in a variety of display orders. Right-click anywhere in the **Today's Conduct Incidents for Selected Groups** widget then select **Surname**, **Forename**, **Reg** or **Type** from the pop-up menu to display the content in the selected order.



Revert to the original display by right-clicking anywhere in the widget then selecting **Hide Groups** from the pop-up menu.

To revert to the bar chart view, click the **Options** button then select **Toggle** from the pop-up menu.

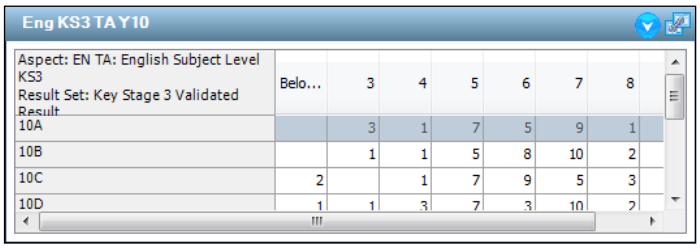
Additional Resources:

Recording Behaviour Incidents chapter of the *Managing Pupil/Students* handbook
Recording Achievements chapter of the *Managing Pupil/Students* handbook
Configuring and Using the Student Teacher View mini guide

Viewing the Assessment Summary

A summary of pupil/student assessments can be displayed in the **Assessment Summary** widget on the SIMS **Home Page**, enabling the monitoring of their progress. The assessment information displayed is defined as part of the widget configuration process (please see *Configuring the Assessment Summary Panel* on page *85*).

The following example shows the **Assessment Summary** widget when the EN TA: English Subject Level KS3 aspect and all the registration groups in year 10 are selected.

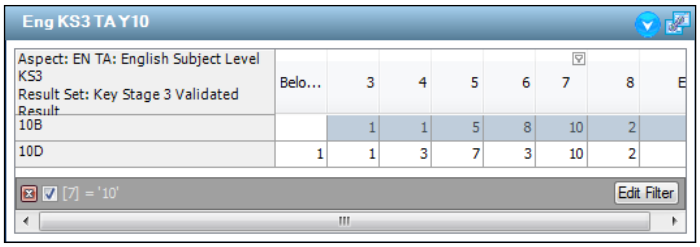


TIP: If you have selected to display more than three groups, or if you have selected an aspect with more than seven grades, you are advised to view the data in full screen mode.

The widget name is renamed according to the selected analysis.

The sort order of the Assessment Summary widget can be changed by clicking the required column header.

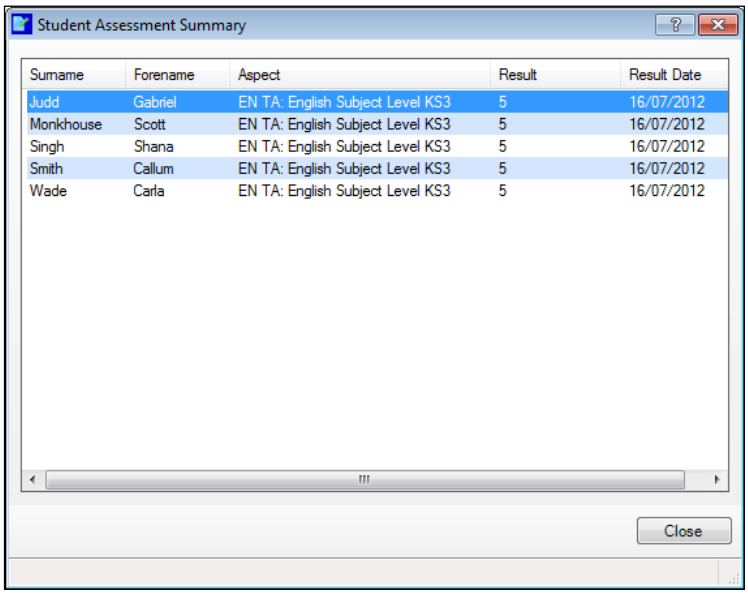
A filter can be applied to the data to display specific results. In the previous graphic for example, registration groups with 10 pupil/students who have achieved a grade 7 for the selected aspect can be displayed by hovering over the grade 7 column heading, clicking the **Filter** icon that is displayed in the top-right hand corner of the column heading (as displayed in the following graphic) then selecting **10** from the list.



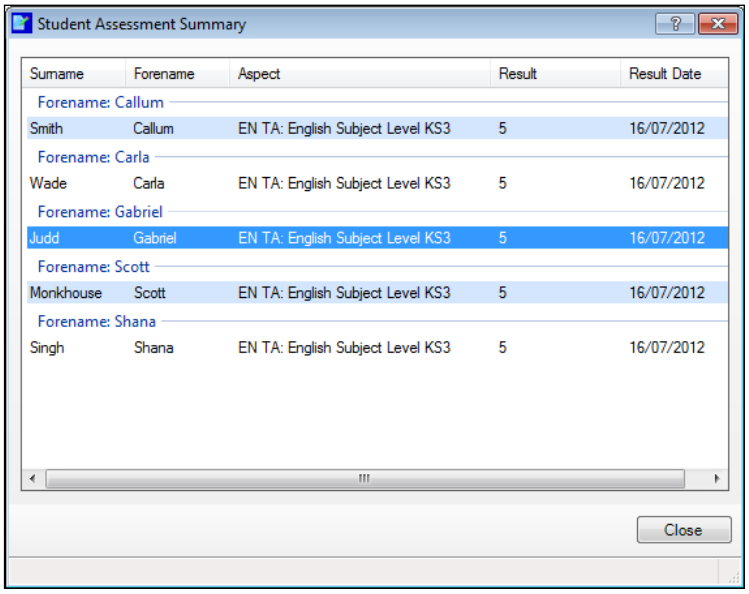
Additional Resources:

For full instruction on adding, editing and removing filters, please refer to *Using the Filter Editor* in the *Entering and Reviewing Data using Marksheets* chapter of the *Administering Assessment* handbook.

You can drill into the data to see which pupil/students have achieved a particular grade. Double-click the required grade cell to display the **Student Assessment Summary** dialog.



This information can be viewed in a variety of display orders. Right-click anywhere in the dialog then select **Surname**, **Forename**, **Aspect**, **Result** or **Result Date** from the pop-up menu to display the content in the selected order.



Revert to the original display by right-clicking anywhere in the dialog then selecting **Hide Groups** from the pop-up menu.

Double-click the required pupil/student to drill further into the data and to display their **Pupil (or Student) Teacher View** page.

Click the **Close** button to return to the SIMS **Home Page**.

Increasing the Size of Panels on the Home Page

All of the panels on the SIMS **Home Page** (with the exception of the **Favourites** panel) can be expanded to display their content in full screen mode. This is particularly useful if a panel contains a lot of information, which may be difficult to read in the default view.

Click the **Expand** button to maximise the required panel to full screen mode.

Once maximised, the panel can be reduced to its original size by clicking the **Restore** button.

Expand button

Restore button

If a panel is expanded when you exit SIMS, it will be restored to its original size the next time you log into SIMS.

Setting Panel Refresh Rates

The content of the widgets on the SIMS **Home Page** refresh automatically after a defined period of time. Each of the widgets refresh at a different rate. When a widget is refreshing, the **Panel Refreshing** icon (located in the bottom right-hand corner of the widget) rotates.

Panel Refreshing icon

A number of the widgets can be refreshed manually, in case you wish to view updated content between automatic refreshes. The display of the **Refresh** icon (displayed in the top right-hand corner of a widget) indicates whether or not a widget can be refreshed manually.

Refresh icon

Click the **Refresh** icon to update the content of the widget.

The following widgets can be refreshed manually:

- My Timeline
- School Diary
- Favourites
- My Messages
- Conduct Summary
- Missing Registers Notification

The refresh rate for the following widgets can be set:

- My Timeline widget (please see *Configuring the My Timeline Panel* on page *74*). By default, this widget refreshes every 15 minutes.
- School Diary widget (please see *Configuring the School Diary Panel* on page *76*). By default, this widget refreshes every 30 minutes.
- My Messages widget (please see *Configuring the My Messages Panel* on page *77*). By default, this widget refreshes every 1 minute.
- Conduct Summary widget (please see *Configuring the Conduct Summary Panel* on page *82*). By default, this widget refreshes every 12 minutes.
- Missing Registers Notification widget (please see *Configuring the Missing Register Notification Panel* on page *78*). By default, this widget refreshes every 10 minutes.

The default for the following is set by SIMS and cannot be amended:

- School Bulletins
- My Reminders
- Favourites
- Attendance Summary
- Assessment Summary
- My Scheduled Reports
- My Detention Sessions.

03 | Configuring the SIMS Home Page

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Home Page Configuration Overview

The content and layout of the SIMS **Home Page** can be defined on a per user basis, enabling the display of information that relates to specifically to each SIMS user.

The information displayed on the SIMS **Home Page** is displayed in individual panels, which each user can choose to display or hide. When panels are added to the SIMS **Home Page**, they are placed in any empty space to the right-hand side of an existing panel. If there is no space to the right-hand side of an existing panel (i.e. it is the edge of the screen), it is placed in the next available space on the following line.

The panels that can be displayed on your SIMS **Home Page**, together with their content, are determined by the permissions you have been granted by the System Manager. For example, if you are a class teacher of registration group 8A, the System Administrator may have set up panels on your **Home Page** that display information relating to registration group 8A by default.

The displayed panels can be configured to display data relevant to your role and, for class teachers, the classes that they teach. For example, a Head of Year might want to display behaviour incident information by registration group, whereas a Head Teacher might want to display the same information by year group.

WARNING: *Prior to adding panels to the SIMS* ***Home Page****, please consider the performance issues that this might cause. Some of the panels that can be displayed on the SIMS* ***Home Page*** *might be set to refresh regularly. If the SIMS* ***Home Page*** *for many concurrent users contains a large number of panels, this could lead to a reduction in the performance level of your SIMS system.*

Configuring the SIMS Home Page

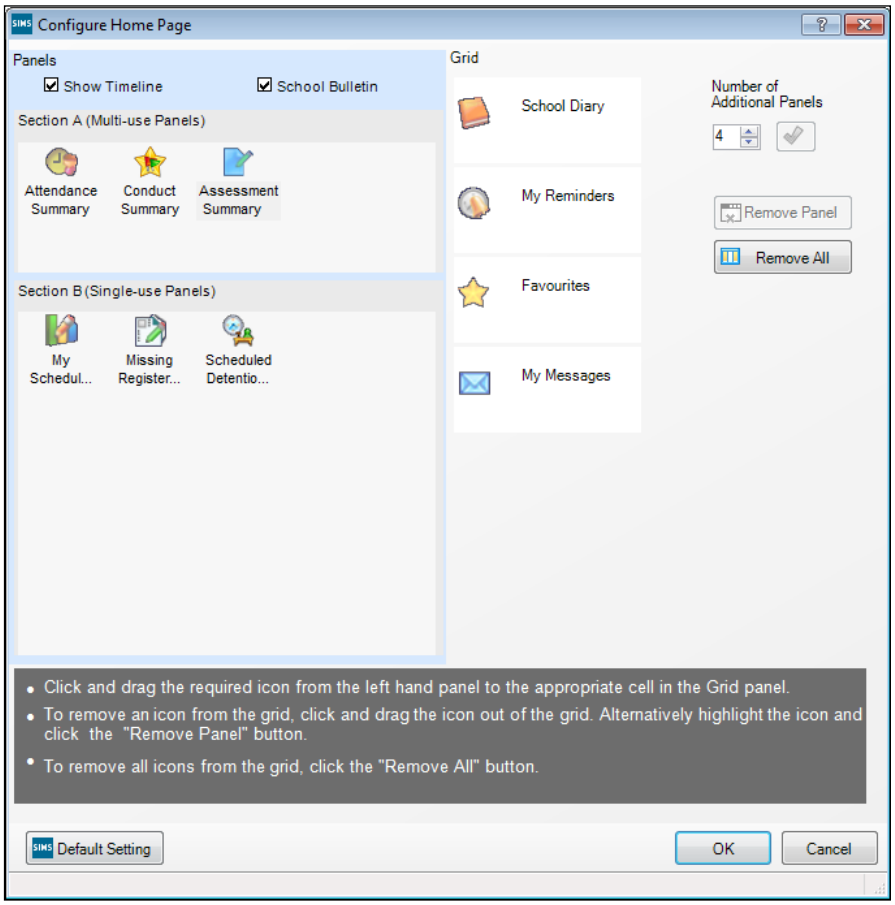
The content and layout of the SIMS **Home Page** can be defined on a per user basis, enabling the display of information that relates specifically to each SIMS user. Changing the content and layout on your SIMS **Home Page** does not affect the display of the Home Page on any other user's workstation.

The number of panels displayed and their display order can be defined. Once displayed on the SIMS **Home Page**, many of the panels offer additional configuration options.

> *NOTE: A maximum of 50 panels can be displayed on the SIMS **Home Page**.*

The number of panels displayed on the SIMS **Home Page**, together with their content and display order, can be defined.

Click the **Configure** button at the top of the SIMS **Home Page** to display the **Configure Home Page** dialog.



The panels currently displayed on your SIMS **Home Page** are shown in the **Grid** on the right-hand-side of the dialog. The **Grid** represents the display order of these panels on the SIMS **Home Page**, not the precise layout. When panels are added to the SIMS **Home Page**, they are placed in any empty space to the right-hand side of an existing panel. If there is no space to the right-hand side of an existing panel (i.e. it is the edge of the screen), it is placed in the next available space on the following line.

For new users of SIMS, the **Grid** contains the panels set up by the System Administrator.

> *NOTE: Panels in the **Grid** displaying a lock symbol indicate that your System Administrator has dictated the display of this panel. You do not have permissions to remove this panel from your **Home Page**. It may also be possible that you are unable to add panels, and the **Panels** section is greyed out to indicate this.*

Additional Resources:

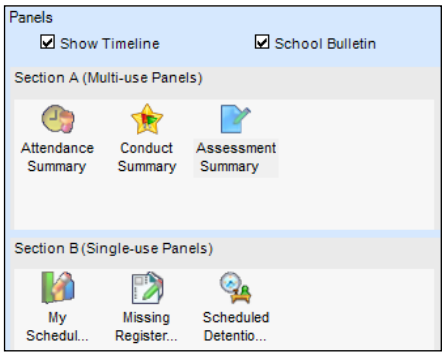
General SIMS Setups chapter of the *Setting up and Administering SIMS* handbook

More Information:

Configuring the Individual Panels on the SIMS Home Page on page *73*
Using the SIMS Home Page on page *5*

Displaying and Hiding the Default SIMS Home Page Panels

To facilitate the selection of panels you might want to display on your SIMS **Home Page**, the **My Timeline** and **School Bulletins** panels have been identified as two panels that are likely to be beneficial to all SIMS users. Consequently, they have been defined as default panels that you can choose to display prominently on the SIMS **Home Page**.



When panels are added to the SIMS **Home Page**, they are placed in any empty space to the right-hand side of an existing panel. If there is no space to the right-hand side of an existing panel (i.e. it is the edge of the screen), it is placed in the next available space on the following line.

In the **Panels** section on the left-hand side of the **Configure Home Page** dialog, select or deselect the **Show Timeline** and **School Bulletin** check boxes.

- If selected, the **My Timeline** panel will always be displayed as the first panel, at the top-left hand side of the SIMS **Home Page**.
- If only the **School Bulletins** check box is selected, it will be displayed as the first panel on the SIMS **Home Page**.
- If both of these check boxes are selected, the **School Bulletins** panel will be displayed in any empty space to the right-hand side of the **My Timeline** panel. If no space is available to the right, it will be placed in the next available slot on the following line.

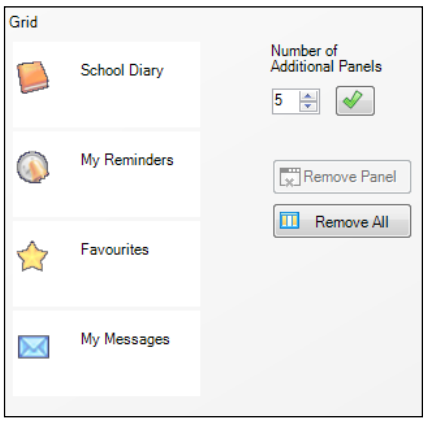
Click the **OK** button to return to the SIMS **Home Page**, where the display will be updated.

Selecting the Number of Additional Panels to Display on the SIMS Home Page

The number of panels you wish to display on the SIMS **Home Page** can be defined. This number is in addition to the default panels (the **My Timeline** and **School Bulletin** panels) that you may have selected (please see *Displaying and Hiding the Default SIMS Home Page Panels* on page *49*). Therefore if you want to display six panels in total, including the two default panels, enter 4 in the **Number of Additional Panels** field.

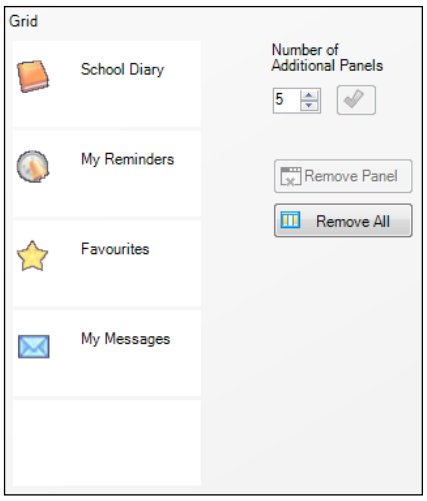
- If the **Number of Additional Panels** is increased, an additional empty panel is displayed beneath the final selected panel.
- If the **Number of Additional Panels** is decreased, any panels that would cause this value to be exceeded are removed, starting from the bottom of the **Grid** list.

1. Enter the **Number of Additional Panels** you want to display on the SIMS **Home Page**. Alternatively, click in the field then click either the **Up** or **Down** arrow adjacent to the field to change the number.



2. Click the **Save** button.

Save button



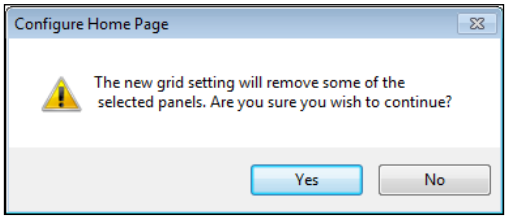
When the configuration is saved, the **Grid** display expands or contracts based on the value entered.

- If the **Number of Additional Panels** was increased, an additional empty panel is displayed beneath the final selected panel.

  In the previous graphic, an empty space has been added beneath the **My Messages** panel, enabling another panel to be added to the SIMS **Home Page**.

- If the **Number of Additional Panels** was decreased, any panels that would cause this value to be exceeded are removed, starting from the bottom of the **Grid** list.

  In the previous graphic, if the **Number of Additional Panels** was now reduced to four, only the empty space at the bottom of the **Grid** would be removed. However if the **Number of Additional Panels** was reduced to two, the following message will be displayed because you are attempting to remove an occupied space on the SIMS **Home Page**.

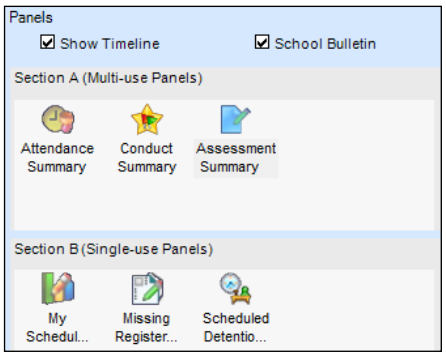


  Click the **Yes** button to remove the **Favourites** panel, **My Messages** panel and the empty space at the bottom of the **Grid** and therefore remove them from the SIMS **Home Page**. Alternatively, click the **No** button to cancel the removal of the panel(s).

3. Click the **OK** button to return to the SIMS **Home Page**, where the display will be updated.

Adding Panels to the Home Page

> ***WARNING:*** *Prior to adding panels to the SIMS* ***Home Page****, please consider the performance issues that this might cause. Some of the panels that can be displayed on the SIMS* ***Home Page*** *might be set to refresh regularly. If the SIMS* ***Home Page*** *for many concurrent users contains a large number of panels, this could lead to a reduction in the performance level of your SIMS system.*



There are two types of panel that can be added to the SIMS **Home Page**:

- Single use panels

  A single use panel serves a single purpose for a SIMS user. This type of panel displays information relevant to the user, e.g. the My Messages panel displays all messages sent to the user and the My Reminders panel displays reminders for events, etc. that the user is involved with. One occurrence of these panels can be added to the SIMS **Home Page**.

- Multi-use panels

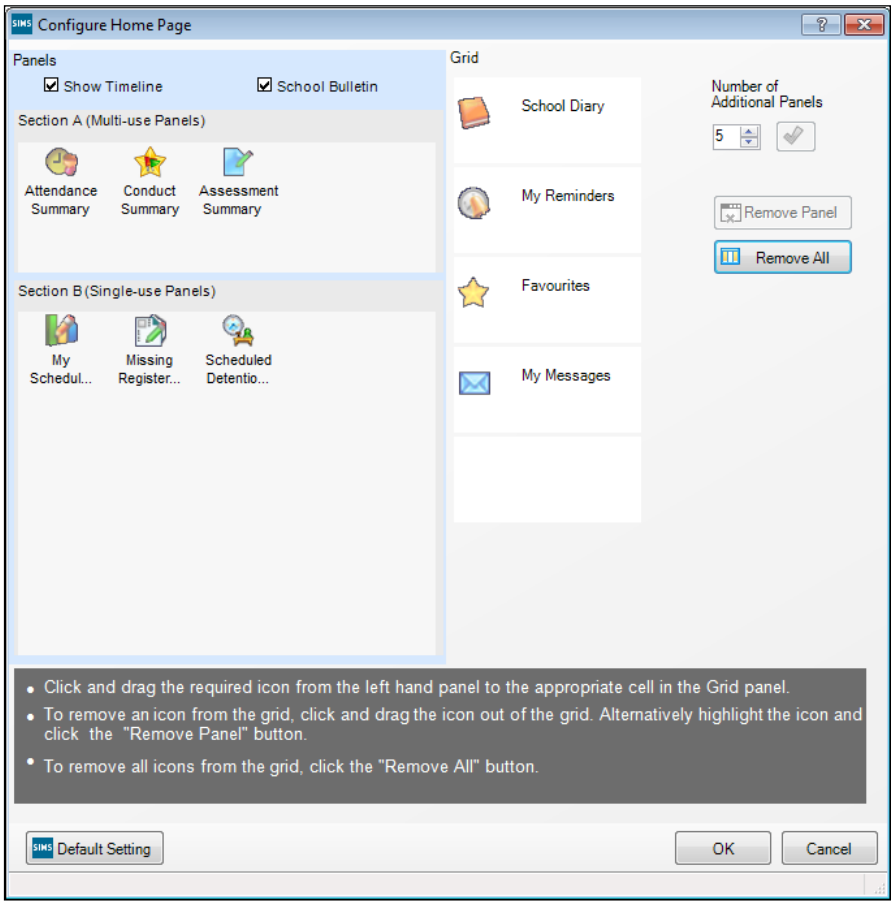
  A multi-use panel enables you to view important information relating to a specific subject matter, but for a range of groups. Multiple instances of a multi-use panel can be added to the SIMS **Home Page**. This would be particularly useful for a Head of Year, for example, who may wish to view an attendance summary for each of their registration groups. This can be achieved by adding more than one occurrence of the Attendance Summary panel to their Home Page and configuring each panel separately to display attendance information for each of the registration groups.

The method of adding a single use panel and a multi-use panel is identical. The configuration options available for each individual panel varies depending on the panel you have added.

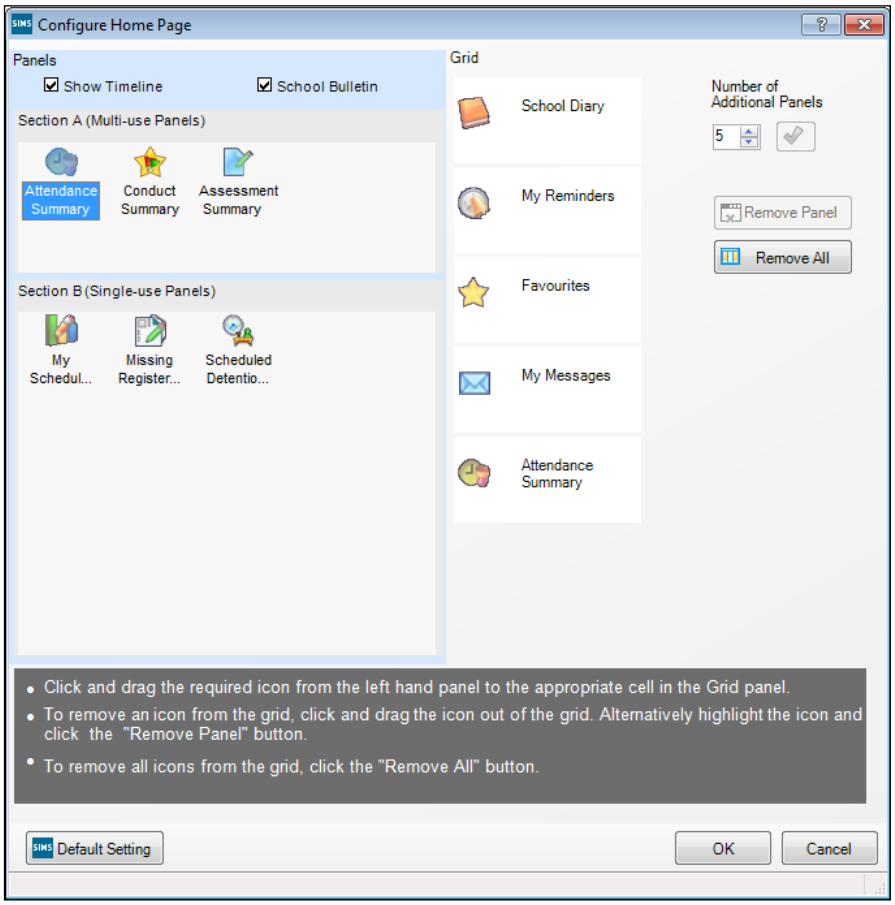
> *NOTE: The ability to add panels to the SIMS* ***Home Page*** *is determined by the lock settings provided by the System Manager/Administrator. The following processes assume that the lock settings have been disabled, enabling you to add panels to the SIMS* ***Home Page****. For more information, please refer to the General SIMS Setups chapter of the Setting up and Administering SIMS handbook.*

The graphics in this section demonstrate how the **Attendance Summary** multi-use panel can be added to the **Grid**.

1. Ensure that a sufficient number of spaces on the SIMS **Home Page** have been provided for the number of panels you wish to add (please see *Selecting the Number of Additional Panels to Display on the SIMS Home Page* on page *50*).



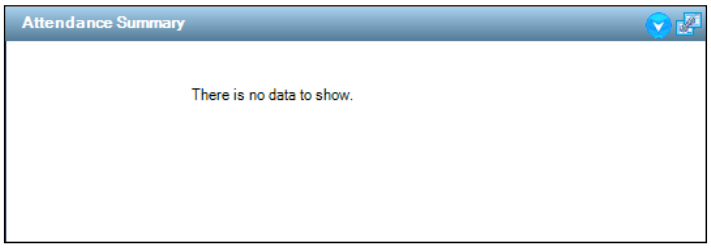
2. Click and drag a panel from either **Section A (Multi-use Panels)** or **Section B (Single-use Panels)** into the required empty position on the **Grid** on the right-hand side of the page. The name of the selected panel is displayed.



> *NOTE: If you attempt to drag a panel into an occupied space in the Grid, a message is displayed in the Status Bar of the dialog, informing you that the panel cannot be placed in this location. If you want to place a panel into a position that is currently occupied, you must first place the panel into an empty space and the move it to the required location (please see* Changing the Panel Order *on page* 58*).*

3. Repeat Step 2 until all of the required panels have been selected. If you are selecting to display a multi-use panel, ensure that one instance of the panel is added for each of the groups you wish to monitor.
4. Click the **OK** button to save the configuration and to return to the SIMS **Home Page**, where the new panels are displayed.

If you have added a multi-use panel to the SIMS **Home Page** and a message is displayed in the panel rather than any data, you must configure this panel separately to indicate your preferences.



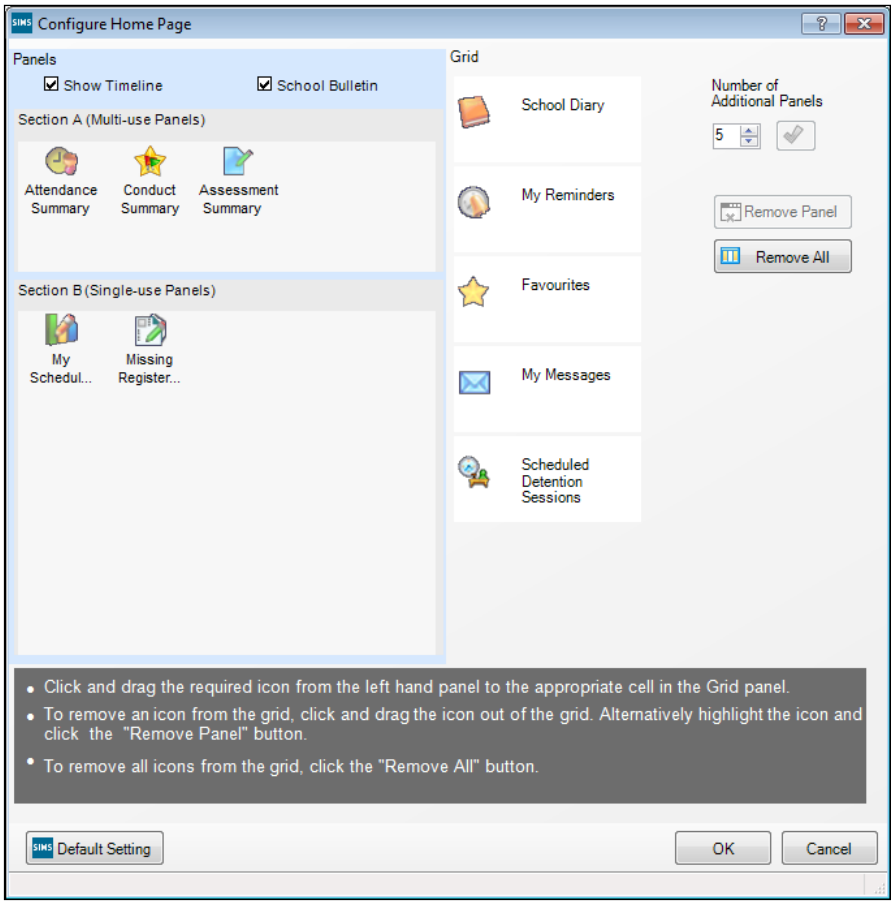
More Information:
Locking Home Page Groups on page *69*

Removing Panels from the Home Page

Panels that are no longer required or have been added to the SIMS **Home Page** in error can be removed.

*NOTE: The ability to add panels to the SIMS **Home Page** is determined by the lock settings provided by the System Manager/Administrator. The following processes assume that the lock settings have been disabled, enabling you to add panels to the SIMS **Home Page**. For more information, please refer to the General SIMS Setups chapter of the Setting up and Administering SIMS handbook.*

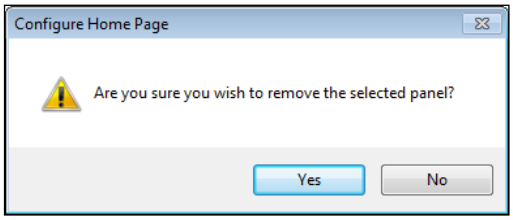
The graphics in this section demonstrate how the **Scheduled Detention Sessions** single use panel can be removed from the **Grid**.



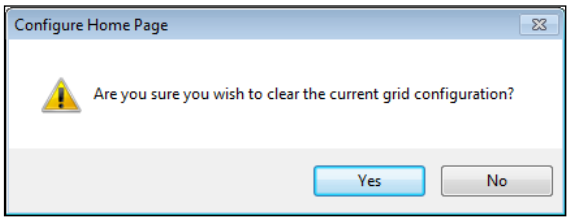
1. In the **Grid** display, click the panel you wish to remove then click the **Remove Panel** button. Alternatively, click and drag the required panel from the **Grid** display to anywhere outside of the **Grid** display. All panels can be removed from the Home Page by clicking the **Remove All** button.

> *NOTE: Removing panels by clicking the **Remove All** does not affect the display of the default panels (**My Timeline** and **School Bulletins**). These are treated separately and their display is controlled by the status of their check boxes in the **Panels** section at the top of the **Configure Home Page** dialog.*

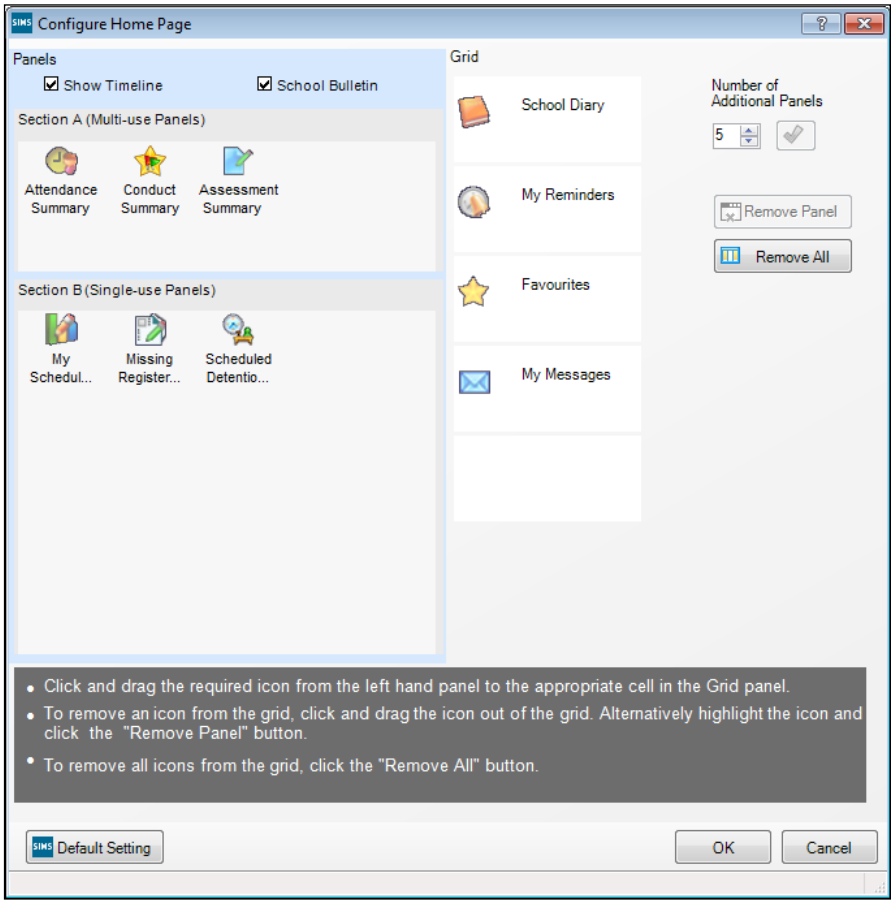
The following message is displayed if you remove a single panel.



The following message is displayed if you remove all panels.



2. Click the **Yes** button to remove the panel(s) or the **No** button to cancel the removal.



The selected panel(s) are removed from the **Grid** display.

If you remove a single use panel, the removed panel will be placed back in the **Section B (Single-use Panels)** section.

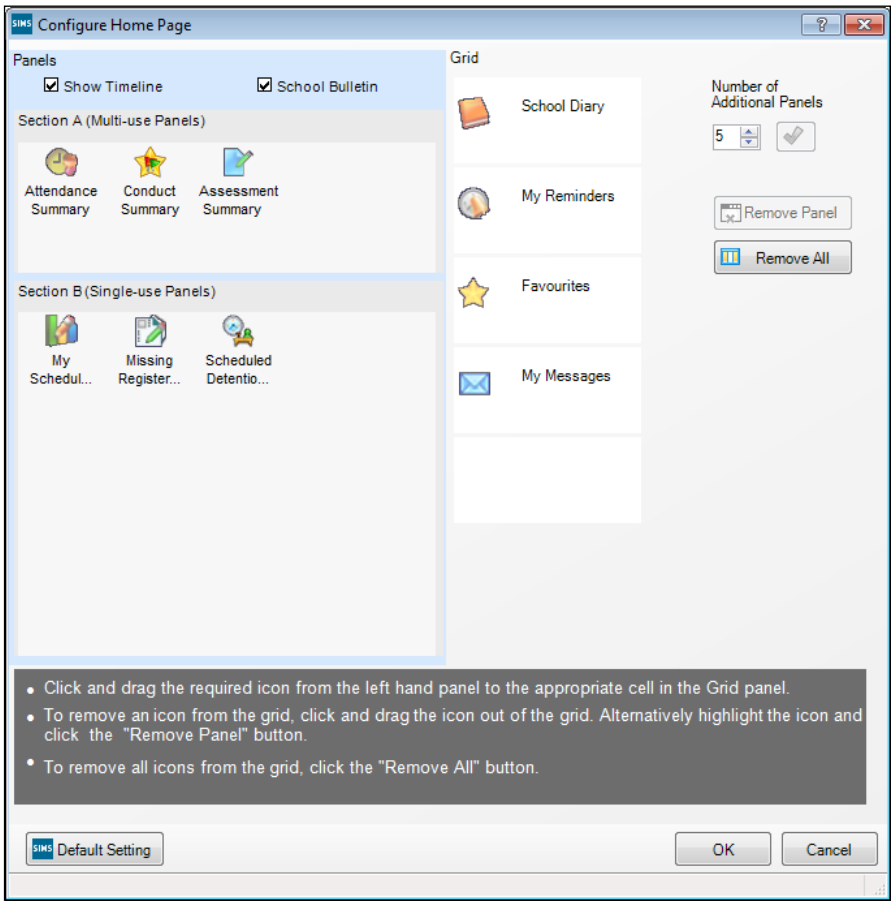
3. Repeat Steps 1 and 2 until all of the required panels have been removed. If you are removing multi-use panels, ensure that each unwanted instance of the panel is removed.
4. Click the **OK** button to save the configuration and to return to the SIMS **Home Page**, where the removed panels are no longer displayed.

More Information:
Locking Home Page Groups on page *69*

Changing the Panel Order

With the exception of the **My Timeline** and **School Bulletins** panels, the display order of all Home Page panels can be changed. This is particularly useful if you want to display a specific panel towards the top of the page, perhaps because you want this information to be instantly visible when the Home Page is displayed.

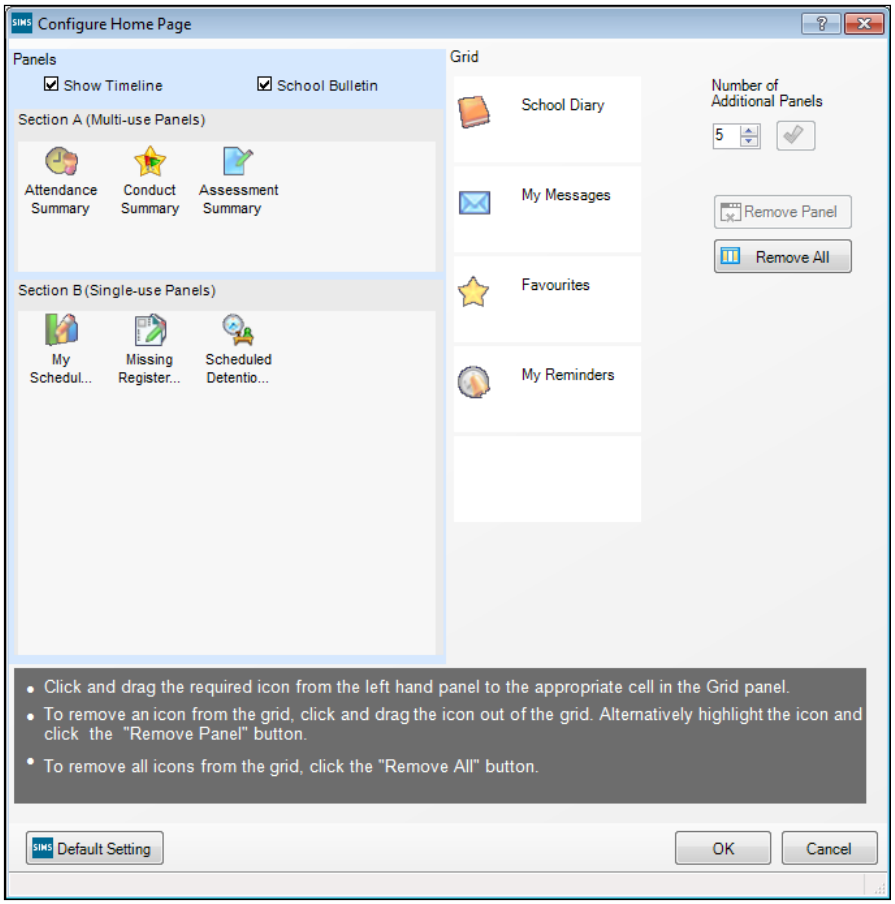
The graphics in this section demonstrate how the panel display order is changed my swapping the location of the **My Messages** and **My Reminders** panels.



1. Ensure that all the panels you wish to display on the SIMS **Home Page** have been added to the **Grid** display (please see *Adding Panels to the Home Page* on page *52*).
2. Click and drag a panel from its current location in the **Grid** display to the required location.

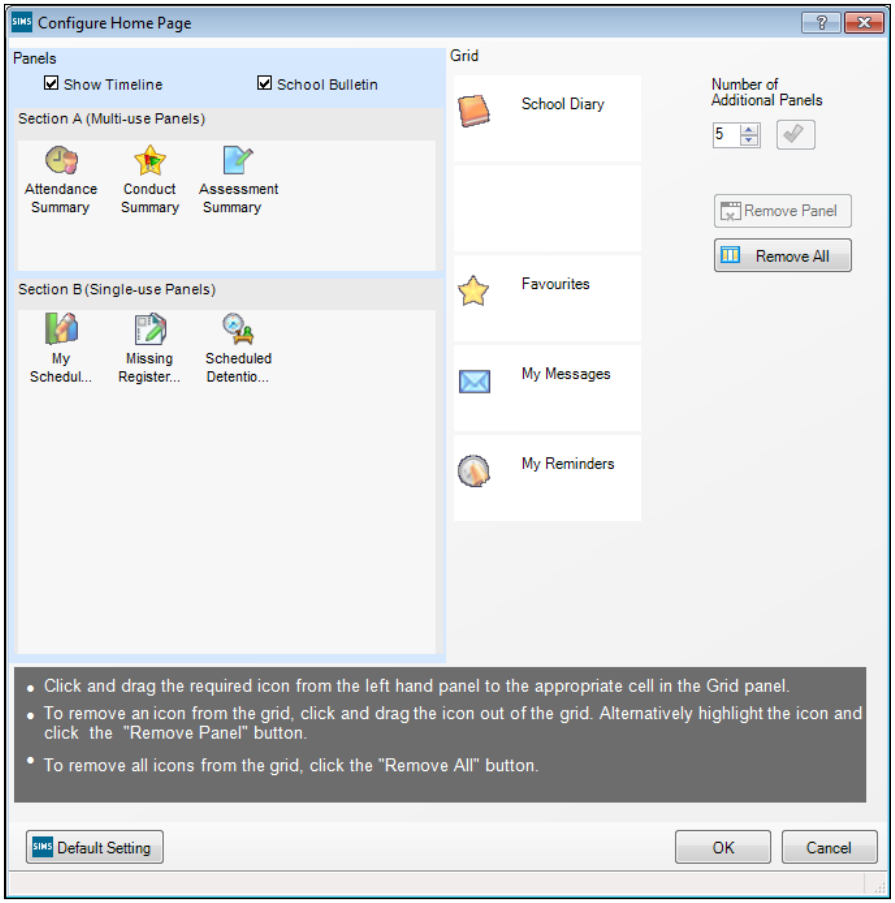
   If you move a panel from its current location to an empty space in the Grid display, the panel is removed from its current location and placed into the empty slot.

If you move a panel from its current location to an occupied space in the Grid display, the two panels change places.



3. Repeat Step 2 until the panels are in the required display order.
4. Click the **OK** button to save the configuration and to return to the SIMS **Home Page**, where the panels are displayed in the new order.

The following graphic demonstrates the situation where, having re-arranged the display order of panels on the Home Page, there is an empty space in the **Grid** display.



If you save this configuration by clicking the **OK** button, no empty spaces are displayed on the SIMS **Home Page**. Instead, if an empty space is present on the **Grid** display, this space is truncated on the Home Page and makes best use of the space available.

Reverting to the Default Home Page View

If you have configured the SIMS **Home Page** to display a set of widgets, and these widgets have been configured individually, it is possible to return to the default Home Page configuration, if required.

> ***WARNING:*** *Before continuing, please ensure that you have read the introductory section on Home Page groups (please see* Understanding Home Page Groups *on page* 61*).*

Restoring the default settings of your Home Page has two effects:

- It restores the layout and configuration of your Home Page widgets to those specified by your Home Page group(s), removing any widgets that are not defined in the Home Page groups.

> *NOTE: If you are not assigned to a Home Page group, your Home Page reverts to the default layout (please see* Default Home Page Panels for Users Not Assigned to a Home Page Group *on page* 63*).*

- It merges any summary panels that are configured to view similar information. For example, if you are the Registration Tutor of registration group 7A and 7B, then you may have two **Attendance Summary** panels on your **Home Page**. Restoring the defaults merges these into a single **Attendance Summary** panel, which displays data for both 7A and 7B. This is applicable only if you are recorded as the registration tutor for both of these classes in the pastoral structure (if you tutor only group 7A, the summary panel for 7B is removed when you restore the default settings).

1. Click the **Configure** button at the top of the SIMS **Home Page** to display the **Configure Home Page** dialog.
2. Click the **Default Setting** button to restore to the default settings then click the **Yes** button to confirm.

> *NOTE: If the **Default Setting** button is disabled, it is not possible to restore the default settings because the Home Page group setting is locked.*

3. Click the **OK** button to save the changes and return to the SIMS **Home Page**.

More Information:
Understanding Home Page Groups on page *61*
Default Home Page Panels for Users Not Assigned to a Home Page Group on page *63*

Understanding Home Page Groups

The information that can be displayed on the SIMS **Home Page** may not be applicable to all members of staff. For example, a Head of Year may want to view only summaries of all pupil/student activity in their year, whereas a class teacher may want to view only the summaries for their class(es).

Home Page groups can be used to ensure that only information relevant to a type of user is displayed on their Home Page. These can be used to display a default set of panels on the **Home Page** for each member of staff who is assigned to a particular group. For example, a class teacher of registration group 7A is assigned to the Registration Tutor Home Page group and therefore, panels that display information on registration group 7A are displayed automatically on their Home Page.

SIMS provides four pre-defined Home Page groups, described in the following table. Please note that all of the pre-defined Home Page groups will include as part of their configuration the automatic display of the **My Timeline** and **School Bulletin** widgets.

Home Page Group	Roles Assigned	Panels Assigned
Head of House	Head of House	School Diary My Messages My Reminders Favourites Attendance Summary Conduct Summary (x 2) Scheduled Detention Sessions.
Head of Year	Head of Year	School Diary My Messages My Reminders Favourites Attendance Summary Conduct Summary (x2) Scheduled Detention Sessions.
Registration Tutor	Class Teacher	School Diary My Messages My Reminders Favourites My Lesson Plans Attendance Summary Conduct Summary (x2).
Senior Leadership Team	Must be added manually by the System Administrator	School Diary My Messages My Reminders Favourites Attendance Summary Conduct Summary (x2) Scheduled Detention Sessions.

NOTES: The preceding table describes only the default assignment of panels to each group in SIMS. Your System Administrator can make changes to these assignments and therefore the panels assigned to you may differ from those specified.

SIMS uses your assignment in the pastoral structure to determine the information displayed on your Home Page. For example, if you are a class teacher recorded as registration tutor for 7A in the pastoral structure, you are assigned summary panels for registration group 7A automatically on your Home Page.

It is possible to be a member of more than one Home Page group. For example, a Head of Year 7 who is also the registration tutor of registration group 7A would be a member of both the ***Registration Tutor*** *group and the* ***Head of Year*** *group. In this case, the member of staff can view the panels assigned to both groups on their Home Page.*

Some members of staff might not be assigned to a Home Page group, in which case they are assigned a default set of Home Page panels (please see Default Home Page Panels for Users Not Assigned to a Home Page Group *on page* 63*).*

Default Home Page Panels for Users Not Assigned to a Home Page Group

Some members of staff might not be assigned to a Home Page group. If this is the case, the following panels are displayed on their Home Page by default:

- My Timeline
- School Bulletins
- School Diary
- My Messages
- My Reminders
- Favourites

Managing Home Page Groups

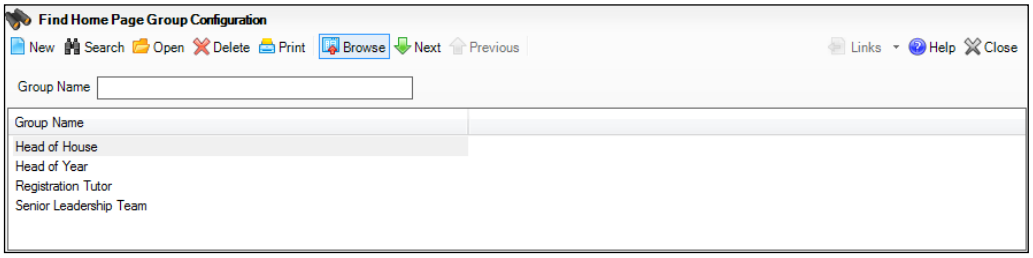
SIMS provides four pre-defined Home Page groups by default. Three of the pre-defined groups are populated automatically with SIMS users, based on their role in the pastoral structure; the Senior Leadership Team is the exception because it requires users to be assigned manually. If the pre-defined Home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

A user can be assigned to more than one Home Page group, meaning that they will be assigned the aggregate of the panels selected for each Home Page group. If a user is not assigned to at least one Home Page group, they are assigned a default set of panels on their Home Page (please see *Default Home Page Panels for Users Not Assigned to a Home Page Group* on page *63*).

Searching for a Home Page Group

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

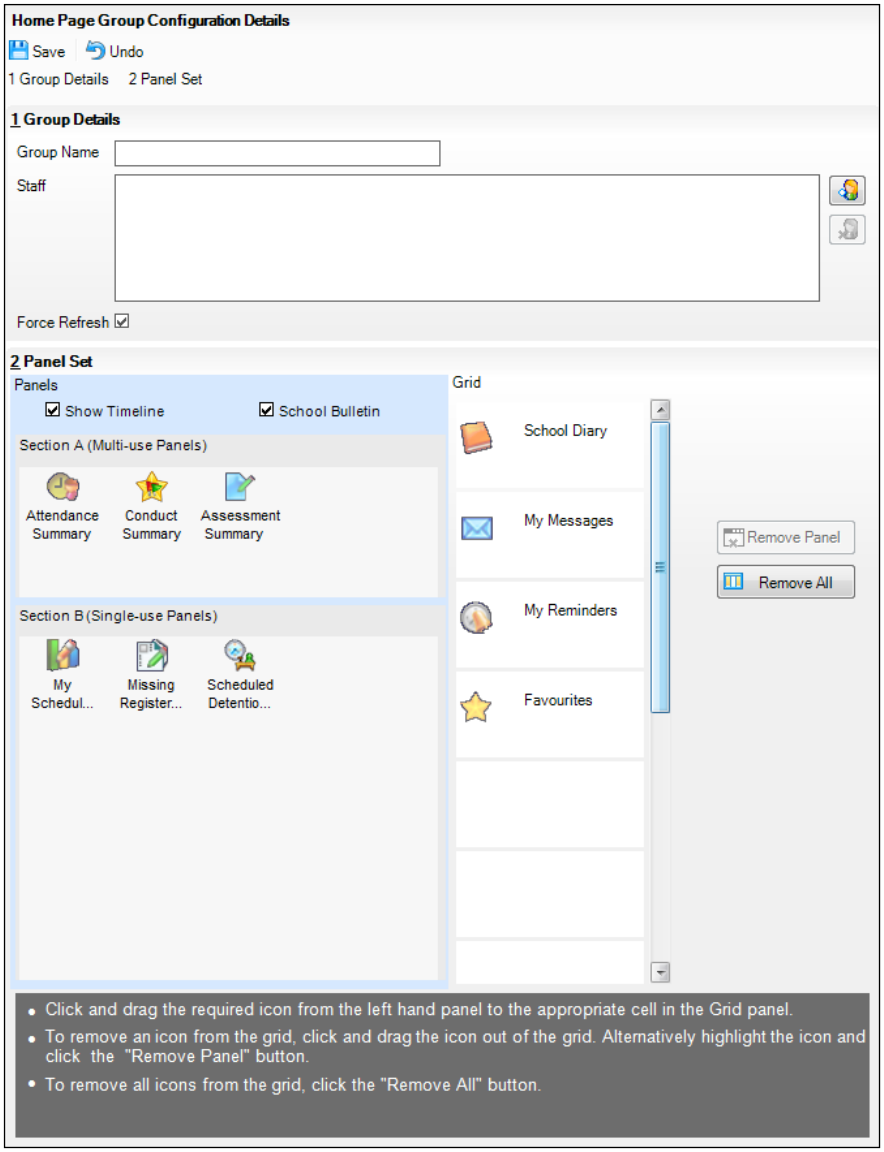
1. Select **Routines | Home Page | Home Page Group Configuration** to display the **Find Home Page Group Configuration** browser.



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

Adding/Editing Home Page Groups

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

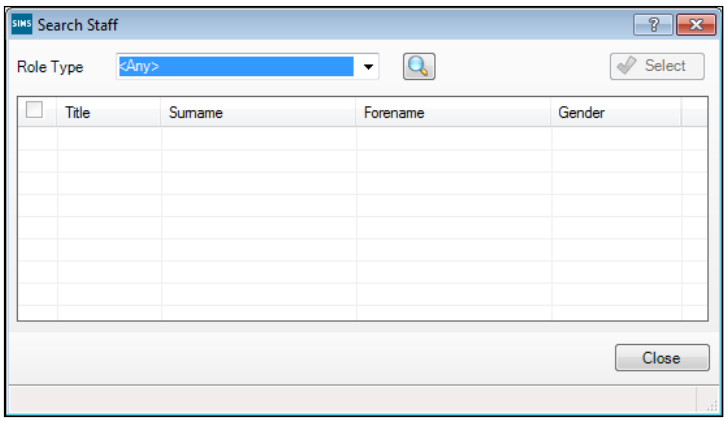


3. Enter a unique **Group Name**.

Assigning Users to a Home Page Group

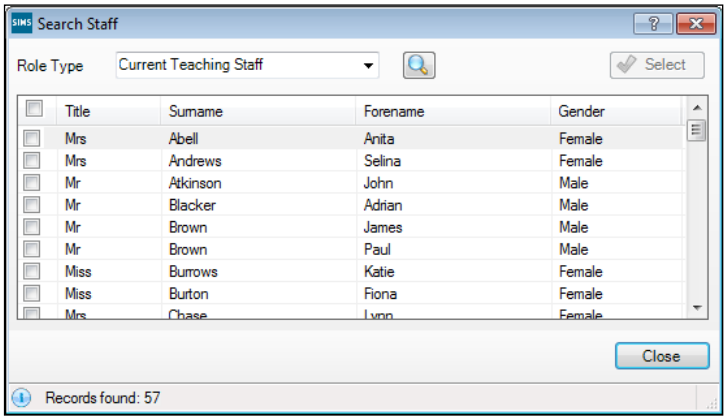
1. Click the **Search Staff** button to display the **Search Staff** dialog.

Search Staff button



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

Search button



3. Select the check box of the member(s) of staff you wish to add to the Home Page group. Alternatively, select the check box in the header row to select all members of staff currently displayed in the **Search Staff** dialog.
4. Click the **Select** button to assign the member(s) of staff to the Home Page group.
5. Click the **Close** button to return to the **Home Page Group Configuration Details** page, where the **Staff** list is populated with the selected member(s) of staff.
6. Any members of staff who have been added in error can be removed from the group by highlighting their name then clicking the **Remove Staff** button.

Remove Staff button

NOTES: A user can be assigned to more than one Home Page group, meaning that they will be assigned the aggregate of the panels selected for each Home Page group.

If a staff member is assigned to more than one Home Page group, and you subsequently remove them from one of these groups, the panels assigned to the group from which they have been removed will still be displayed on their Home Page until they have been removed manually by the user. To remove all group panels from a user's Home Page, the user must be removed from all Home Page groups.

If a user is not assigned to at least one Home Page group, they are assigned a default set of panels on their Home Page (please see Default Home Page Panels for Users Not Assigned to a Home Page Group *on page* 63*).*

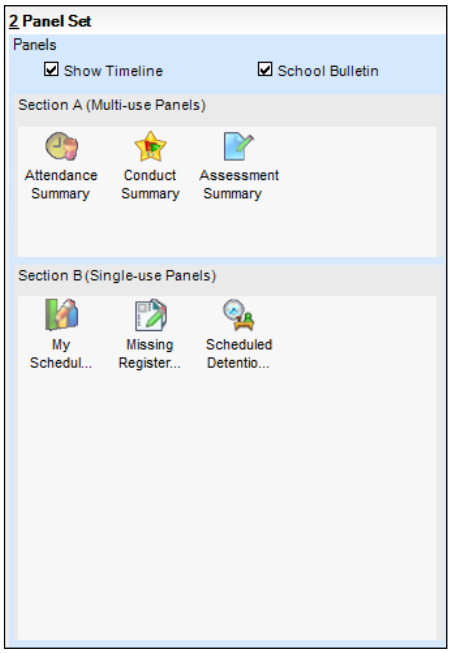
7. Select the **Force Refresh** check box in the **Group Details** panel so that, when the Home Page group configuration is saved, the changes are made to the Home Page configuration of the selected user(s).

*NOTE: If you are adding or removing users from an existing Home Page group, you do not need to select the **Force Refresh** check box. A forced refresh is carried out automatically when an existing Home Page group is saved.*

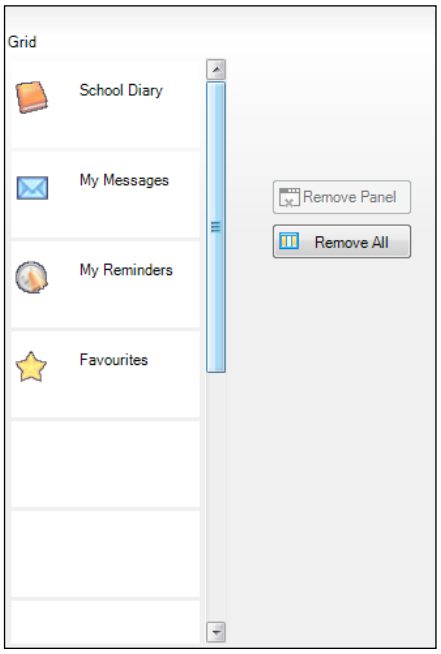
Allocating Panels to a Home Page Group

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

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



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



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

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

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

> *NOTE: If a user cannot see the Home Page group panels on their Home Page following a restart of SIMS, follow the preceding steps to access their Home Page group details, select the* ***Force Refresh*** *check box then click the* ***Save*** *button. When the user restarts SIMS, they should then see the required panels on their Home Page.*

Locking Home Page Groups

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

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

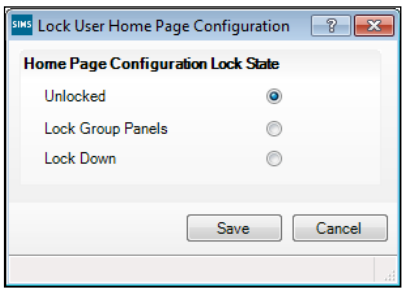
Three levels of locking are available:

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

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

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

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



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

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

Deleting Home Page Groups

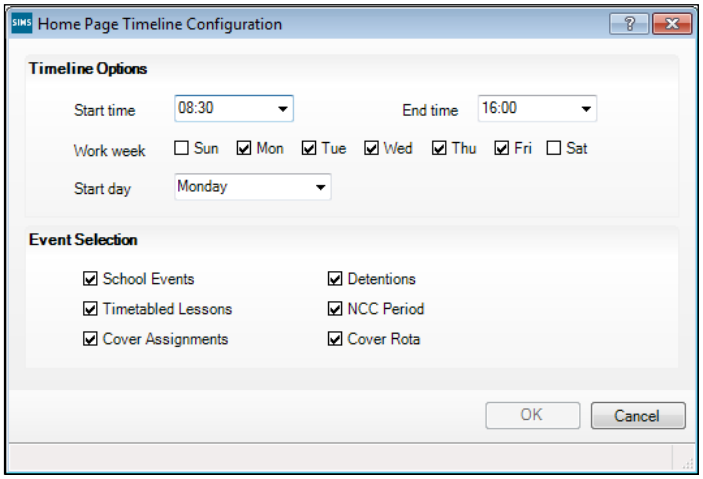
Home Page groups that have been added in error or are no longer required can be deleted.

1. Select **Routines | Home Page | Home Page Group Configuration** to display the **Find Home Page Group Configuration** browser.
2. Click the **Search** button to display all Home Page groups.
3. Highlight the group you wish to delete then click the **Delete** button.

Home Page Timeline Configuration

The default configuration of the **My Timeline** widget on the SIMS **Home Page** can be defined. SIMS users can define their specific requirements using the configure option in the **My Timeline** widget.

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



2. In the **Timeline Options** panel, enter the default **Start time** and **End time** for the **My Timeline** panel. Alternatively, select the times from the respective drop-down lists.

   The dates entered or selected determine the visible timescale on the **My Timeline** panel when the Home Page is opened. Having entered `08:30` as the **Start time** and `16:00` as the **End time** means that, when the Home Page is opened, the period between 08:30 and 16:00 are displayed on-screen, with a white background (indicating 'active' hours). Any times before and after this period are displayed with a darker background, indicating that this is outside of normal working hours.

> *NOTE: A period of 11 hours and 30 minutes can be displayed on the default **My Timeline** view. Use the adjacent scroll bar to view earlier or later events. Alternatively, maximise the display of the **My Timeline** panel to view the panel in full screen mode.*

3. Select the days of the week you wish to display on the **My Timeline** panel by defining the **Work week**. Select the check box adjacent to the day(s) of the week you want to display.
4. Select the first day of the working week from the **Start day** drop-down list. This indicates day of the week that is displayed in the left-hand column and, based on the settings in the **Work week** section, the subsequent columns.
5. In the **Event Selection** panel, select the check box of the type(s) of event you wish to display in the **My Timeline** panel.

6. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

More Information:
Increasing the Size of Panels on the Home Page on page *45*

04 | Configuring the Individual Panels on the SIMS Home Page

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Introduction

The content and layout of the SIMS **Home Page** can be defined on a per user basis, enabling the display of information that relates specifically to each SIMS user. Changing the content and layout on your SIMS **Home Page** does not affect the display of the Home Page on any other user's workstation.

The number of panels displayed and their display order can be defined. Once displayed on the SIMS **Home Page**, many of the panels offer additional configuration options.

There are two types of panel that can be added to the SIMS **Home Page**:

- Single use panels

  A single use panel serves a single purpose for a SIMS user. This type of panel displays information relevant to the user, e.g. the My Messages panel displays all messages sent to the user and the My Reminders panel displays reminders for events, etc. that the user is involved with. One occurrence of these panels can be added to the SIMS **Home Page**. Additional configuration options are available for most single use panels.

- Multi-use panels

  A multi-use panel enables you to view important information relating to a specific subject matter, but for a range of groups. Multiple instances of a multi-use panel can be added to the SIMS **Home Page**. This would be particularly useful for a Head of Year, for example, who may wish to view an attendance summary for each of their registration groups. This can be achieved by adding one occurrence of the Attendance Summary panel to their Home Page and configuring each panel separately to display attendance information for each of the registration groups. Additional configuration options are available for all multi-use panels.

The additional configuration options available depend on the panel. The following panels offer additional configuration options:

- My Timeline (please see *Configuring the My Timeline Panel* on page *74*)
- School Diary (please see *Configuring the School Diary Panel* on page *76*)
- My Messages (please see *Configuring the My Messages Panel* on page *77*)
- Attendance Summary (please see *Configuring the Attendance Summary Panel* on page *80*)
- Conduct Summary (please see *Configuring the Conduct Summary Panel* on page *82*)
- Assessment Summary (please see *Configuring the Assessment Summary Panel* on page *85*)
- Missing Registers Notification (please see *Configuring the Missing Register Notification Panel* on page *78*)
- My Detention Sessions (please see *Configuring the My Detention Sessions Panel* on page *79*)

The following panels do not offer additional configuration options:

- School Bulletins
- My Reminders
- Favourites
- My Scheduled Reports

More Information:
Configuring the Assessment Summary Panel on page *85*
Configuring the Attendance Summary Panel on page *80*
Configuring the Conduct Summary Panel on page *82*
Configuring the Missing Register Notification Panel on page *78*
Configuring the My Messages Panel on page *77*
Configuring the My Timeline Panel on page *74*
Configuring the My Detention Sessions Panel on page *79*
Configuring the School Diary Panel on page *76*

Configuring the My Timeline Panel

Your timetable is displayed in the **My Timeline** widget on the SIMS **Home Page**.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **My Timeline** panel has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page *52*).

The content of the **My Timeline** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the Home Page is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **My Timeline** panel with any new events, etc. at regular intervals.

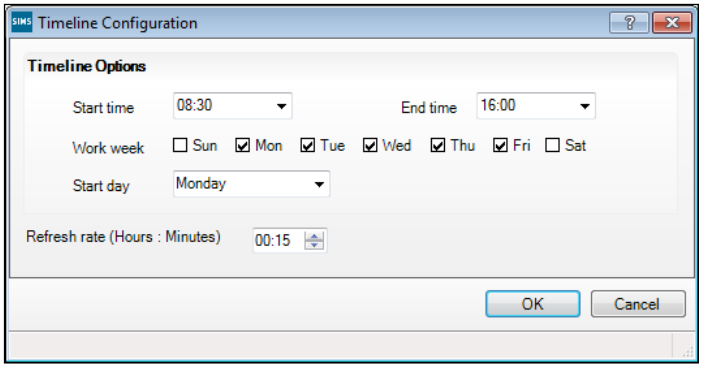
WARNING: *Prior to setting a default refresh rate for a panel on the SIMS* ***Home Page****, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.*

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.

Refresh button

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Timeline Configuration** dialog.

Options button



2. Enter the default **Start time** and **End time** for the **My Timeline** panel. Alternatively, select the times from the respective drop-down lists.

   The dates entered or selected determine the visible timescale on the **My Timeline** panel when the Home Page is opened. Having entered `08:30` as the **Start time** and `16:00` as the **End time** means that, when the Home Page is opened, the period between 08:30 and 16:00 are displayed on-screen, with a white background (indicating 'active' hours). Any times before and after this period are displayed with a darker background, indicating that this is outside of normal working hours.

   > *NOTE: A period of 11 hours and 30 minutes can be displayed on the default **My Timeline** view. Use the adjacent scroll bar to view earlier or later events. Alternatively, maximise the display of the **My Timeline** panel to view the panel in full screen mode.*

3. Select the days of the week you wish to display on the **My Timeline** panel by defining the **Work week**. Select the check box adjacent to the day(s) of the week you want to display.
4. Select the first day of the working week from the **Start day** drop-down list. This indicates day of the week that is displayed in the left-hand column and, based on the settings in the **Work week** section, the subsequent columns.
5. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 15 minutes.
6. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

More Information:
Viewing the My Timeline Panel on page *5*
Increasing the Size of Panels on the Home Page on page *45*

Configuring the School Diary Panel

The School Diary is used to record and display any school events that occur during the course of the academic year. These might include school trips, training days, staff meetings, parent consultation evenings, etc.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **School Diary** panel has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page *52*).

The content of the **School Diary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the Home Page is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **School Diary** panel with any new events, etc. at regular intervals.

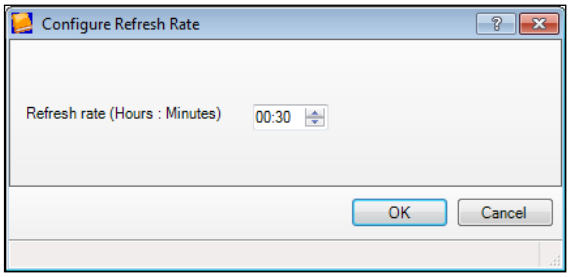
WARNING: *Prior to setting a default refresh rate for a panel on the SIMS* ***Home Page****, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.*

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.

Refresh button

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Configure Refresh Rate** dialog.

Options button



2. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 30 minutes.
3. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

More Information:
Viewing the School Diary on page *17*

Configuring the My Messages Panel

All messages that you have received are displayed in the **My Messages** widget on the SIMS **Home Page**. This includes system messages if a message that you have sent to another SIMS user cannot be delivered.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **My Messages** panel has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page *52*).

The content of the **My Messages** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the Home Page is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **My Messages** panel with any new messages at regular intervals.

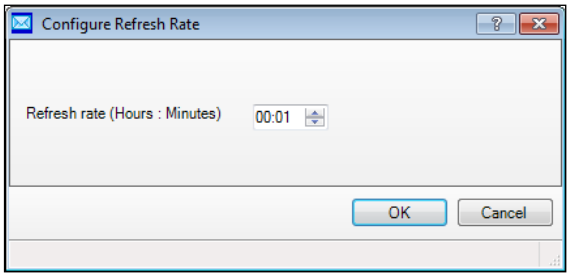
WARNING: *Prior to setting a default refresh rate for a panel on the SIMS **Home Page**, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.*

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.

Refresh button

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Configure Refresh Rate** dialog.

Options button



2. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 1 minute.
3. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

More Information:
Viewing My Messages on page *23*

Configuring the Missing Register Notification Panel

This section is applicable only to users with Attendance Manager permissions.

It is possible to display a list of registers that have not been completed within a specified number of minutes after a lesson or session starts.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **Missing Register Notification** widget has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page *52*).

The content of the **Missing Register Notification** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the Home Page is not already open). However your SIMS session may run all day, so you can ask SIMS to update the **Missing Register Notification** panel with any new messages at regular intervals.

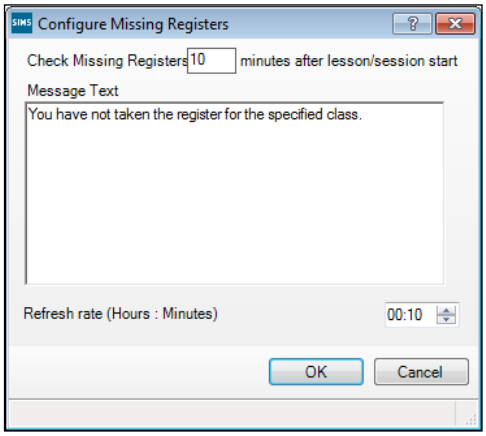
WARNING: *Prior to setting a default refresh rate for a panel on the SIMS* ***Home Page****, please consider the performance issues that this might cause. If regular default refresh rates are set for all SIMS users, this could lead to a reduction in the performance level of your SIMS system.*

Alternatively, click the **Refresh** button at any point during the day to refresh instantly.

Refresh button

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Configure Missing Registers** dialog.

Options button



2. Enter the number of minutes after a lesson/session starts that you wish to check for missing registers in the **Check Missing Registers** field.
3. The **Message Text** you wish to send with the notification can be defined. The default message is:

   You have not taken the register for the specified class

4. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 10 minutes.

> ***IMPORTANT NOTE:*** *By default, the content of the* ***Missing Registers Notification*** *panel is refreshed every ten minutes. If you elect to check for missing registers 15 minutes after a lesson or session starts, the period of time before the* ***Missing Registers Notification*** *panel displays this information may be up to 25 minutes after the lesson or session starts. It is important to bear this in mind when setting the notification delay.*

5. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

More Information:
Viewing Missing Register Notifications on page *33*

Configuring the My Detention Sessions Panel

Any detention sessions for which you are the main staff member assigned are displayed in the **My Detention Sessions** widget.

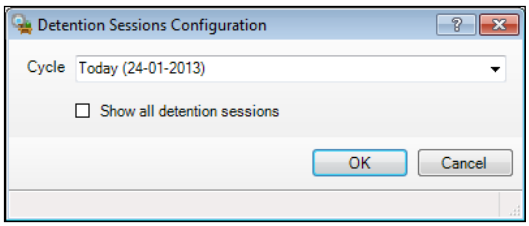
Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

This section assumes that the **My Detention Sessions** panel has been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page *52*).

The content of the **My Detention Sessions** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the Home Page is not already open).

1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Detention Sessions Configuration** dialog.

Options button



2. Select the detentions you wish to display selecting the required **Cycle** from the drop-down list. For example, to display detention sessions for the current week for which you are the main supervisor, select **Current Week (<Start Date of the current week> to <End Date of the current week>)**.
3. To display all detention sessions over the selected **Cycle**, regardless of whether they are the main supervisor, select the **Show all detention sessions** check box.
4. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.

NOTE: If you elect to display all detention sessions over the selected ***Cycle****, the panel is renamed* ***All Detention Sessions Scheduled*** *when you return to the Home Page.*

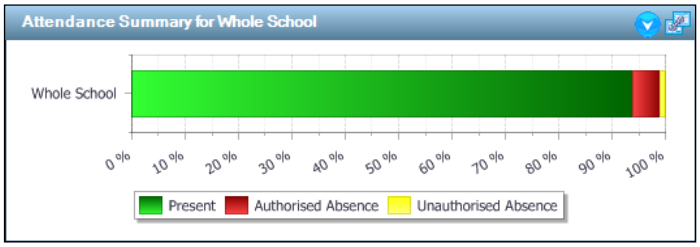
More Information:
Viewing My Detention Sessions on page *36*

Configuring the Attendance Summary Panel

A summary of pupil/student's attendance can be displayed in the Attendance Summary widget on the SIMS **Home Page**, enabling the monitoring of their progress.

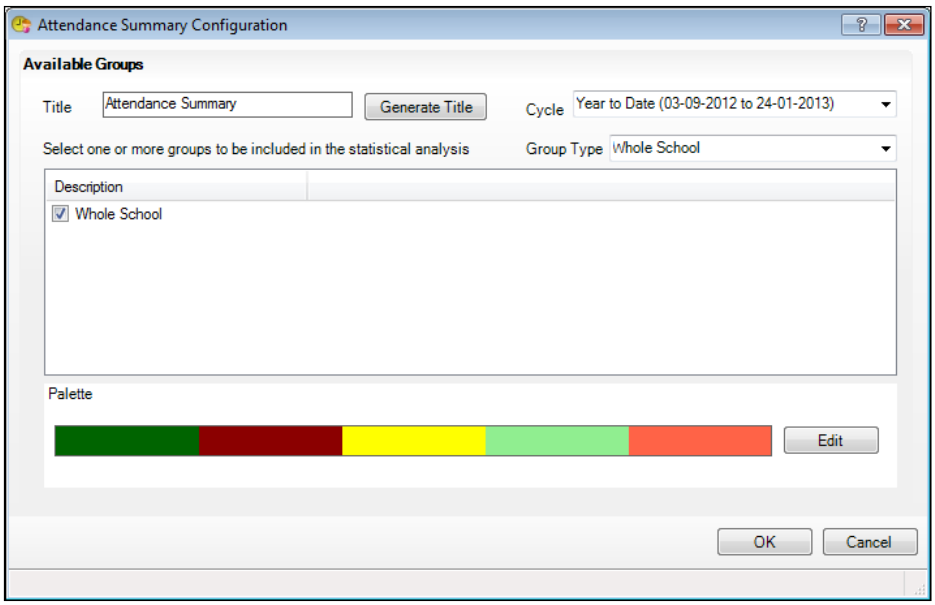
Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

Multiple instances of the **Attendance Summary** panel can be displayed, enabling you to display a panel for each registration group in a year, each year in the school, etc. The content of the **Attendance Summary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the Home Page is not already open).



1. In the appropriate Attendance Summary panel (more than one occurrence of this panel may be displayed on your Home Page), click the **Options** button then select **Configure** from the pop-up menu to display the **Attendance Summary Configuration** dialog.

Options button

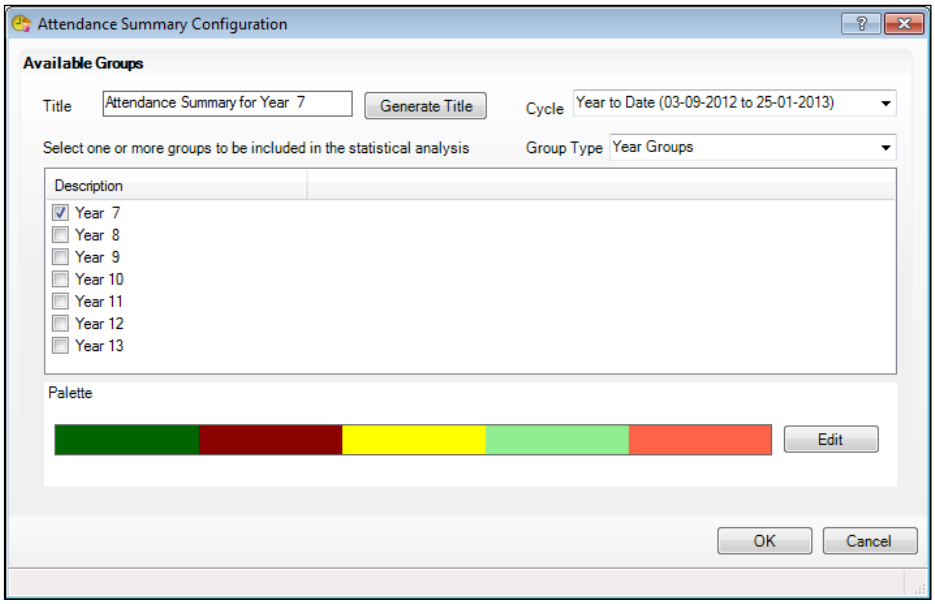


2. Select the period over which you wish to display attendance information by selecting the required **Cycle** from the drop-down list. For example, to display attendance from the first day of the academic year to today's date, select **Year to Date (<Start Date of the current academic year> to <Today's date>)**.

> *NOTE: The **Cycle** enables you to select dates from the current academic year only.*

3. Select the group(s) that you wish to associate with this panel.
   a. Select the required **Group Type** from the drop-down list (e.g. **Year Groups**, **Reg Groups**, etc.). The content of the table displayed below changes, depending on the option selected.

b. Select the check box of the group(s) that you wish to include on the selected panel, e.g. **Year 7**, **11D**, etc.



4. The panel name, as displayed on the SIMS **Home Page**, can be amended. The **Title** defaults to **Attendance Summary**. To append the **Title** with the name of the selected group(s) (e.g. **Attendance Summary for Year 7**, **Attendance Summary for 11D**, etc.), click the **Generate Title** button. Alternatively, overtype the **Title** with the required panel.
5. The colour scheme of the panel can be edited (please see *Editing the Chart Colour Scheme* on page *86*) by clicking the **Edit** button in the **Palette** panel to display the **Palette Editor**.
6. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.
7. Repeat this process for any other instances of the **Attendance Summary** panel that you have elected to display on your Home Page.

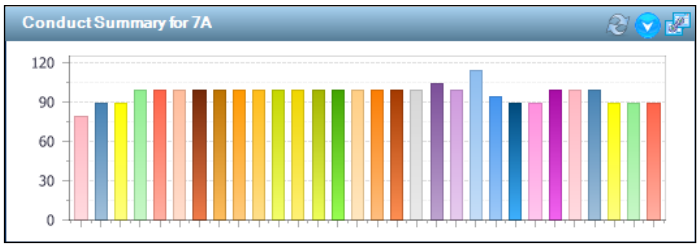
More Information:
Adding Panels to the Home Page on page *52*
Viewing the Attendance Summary on page *37*

Configuring the Conduct Summary Panel

A summary of pupil/student's conduct can be displayed in the **Conduct Summary** widget on the SIMS **Home Page**, enabling the monitoring of their progress.

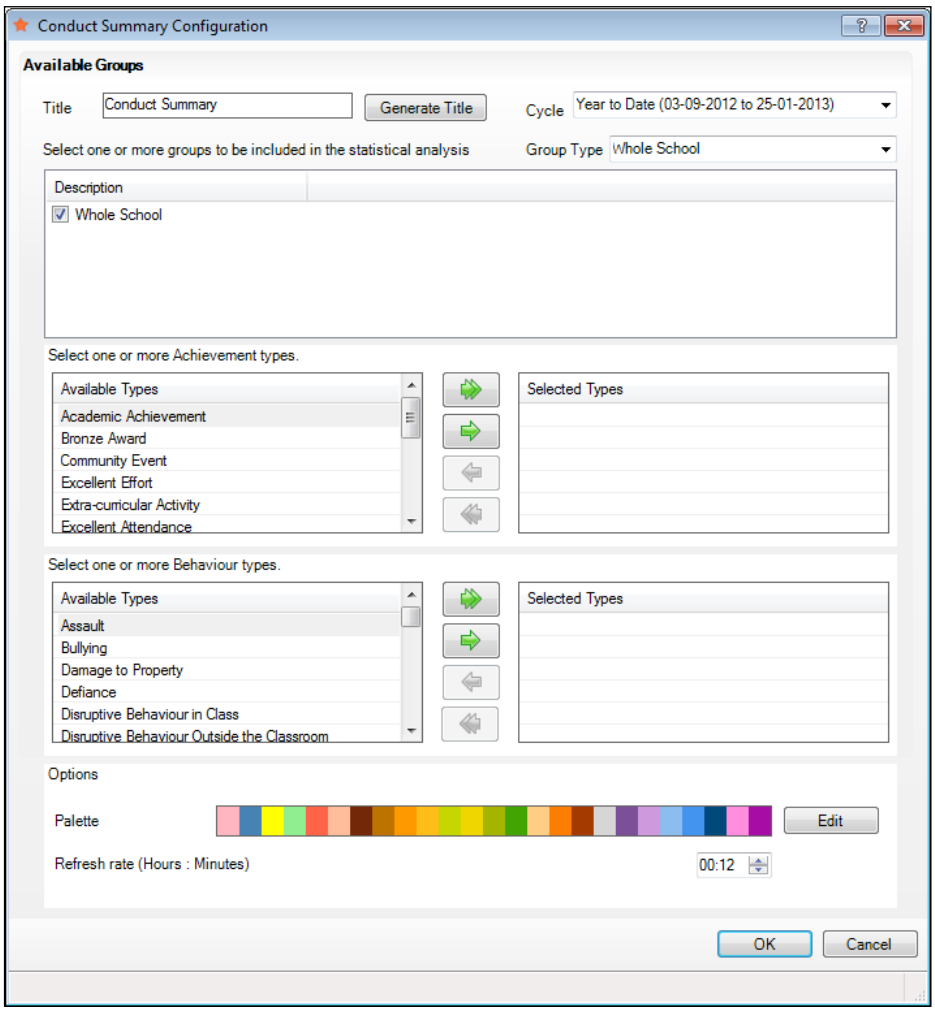
Additional configuration options are available for this widget, enabling you to define precisely how it is presented on-screen.

Multiple instances of the **Conduct Summary** panel can be displayed, enabling you to display a panel for each registration group in a year, each year in the school, etc. The content of the **Conduct Summary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the Home Page is not already open).



1. In the appropriate Conduct Summary panel (more than one occurrence of this panel may be displayed on your Home Page), click the **Options** button then select **Configure** from the pop-up menu to display the **Conduct Summary Configuration** dialog.

Options button



2. Select the period over which you wish to display conduct information by selecting the required **Cycle** from the drop-down list. For example, to display conduct from the first day of the academic year to today's date, select **Year to Date (<Start Date of the current academic year> to <Today's date>)**.

   *NOTE: The **Cycle** enables you to select dates from the current academic year only.*

3. Select the group(s) that you wish to associate with this panel.
   a. Select the required **Group Type** from the drop-down list (e.g. **Year Groups**, **Reg Groups**, etc.). The content of the table displayed below changes, depending on the option selected.
   b. Select the check box of the group(s) that you wish to include on the selected panel, e.g. **Year 7**, **7A**, etc.
4. The panel name, as displayed on the SIMS **Home Page**, can be amended. The **Title** defaults to **Conduct Summary**. To append the **Title** with the name of the selected group(s) (e.g. **Conduct Summary for Year 7**, **Attendance Summary for 7A**, etc.), click the **Generate Title** button. Alternatively, overtype the **Title** with the required panel.
5. Select the achievement types and behaviour types you wish to display on the **Conduct Summary** panel.
   a. In the **Select one or more Achievement types** chooser, highlight the required achievement type then click the **Select** button. Multiple achievement types can be selected using **Ctrl + click** and **Shift + click** functionality then clicking the **Select** button. To select all achievement types in the list, click the **Select all** button. Achievement types added in error can be removed using the same highlighting method then clicking the **Remove** or **Remove all** button.
   b. Repeat Step a to select the required behaviour types in the **Select one or more Behaviour types** chooser.

   NOTE: To enable the effective display of conduct information, you are strongly advised to add no more than 30 achievement and behaviour types to the Conduct Summary panel. Printed output of the panel will also be more difficult to view if a larger number of types are displayed and some types may not fit onto the printed output.

6. The colour scheme of the panel can be edited (please see *Editing the Chart Colour Scheme* on page *86*) by clicking the **Edit** button in the **Palette** panel to display the **Palette Editor**.
7. Enter the **Refresh rate (Hours:Minutes)** or use the up and down arrow buttons to select the required value. The default refresh value is 12 minutes.
8. Click the **OK** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.
9. Repeat this process for any other instances of the **Conduct Summary** panel that you have elected to display on your Home Page.

More Information:
Adding Panels to the Home Page on page *52*
Viewing the Conduct Summary on page *41*

Configuring the Assessment Summary Panel

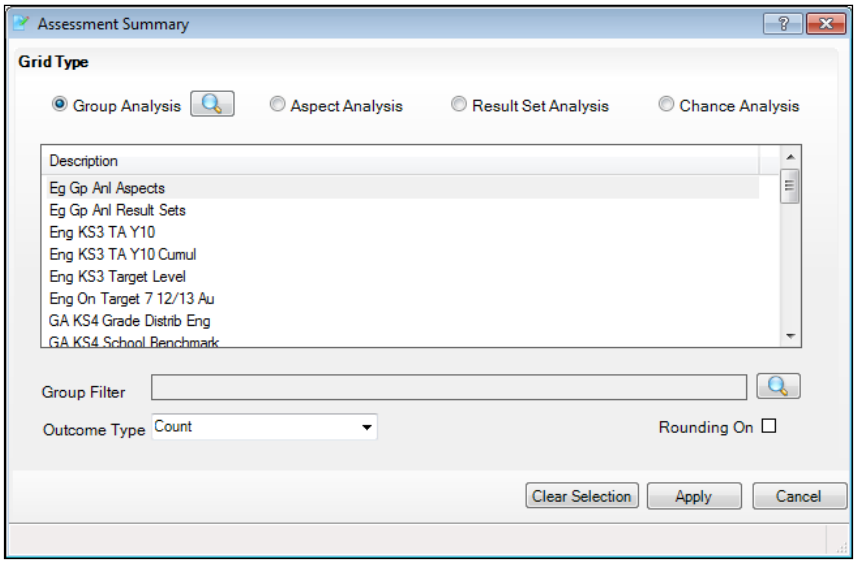
A summary of pupil/student assessment can be displayed in the Assessment Summary widget on the SIMS **Home Page**, enabling the monitoring of their progress.

Additional configuration options are available for this panel, enabling you to define precisely how it is presented on-screen.

Multiple instances of the **Conduct Summary** panel can be displayed, enabling you to display a panel for each registration group in a year, each year in the school, etc. The content of the **Conduct Summary** panel updates automatically when you open SIMS and when you select **Focus | Home Page** (if the Home Page is not already open).

1. In the appropriate **Assessment Summary** panel (more than one occurrence of this panel may be displayed on your Home Page), click the **Options** button then select **Configure** from the pop-up menu to display the **Assessment Summary** dialog.

Options button



2. Select the radio button of the required **Grid Type**. For more information on analysis types, please refer to the appropriate analysis type chapter in the *Analysis in SIMS* handbook.
3. Select the analysis you want to include in the summary, e.g. a **Result Set** analysis of all Key Stage 2 English Tests for Year 7.
4. Click the **Group Filter** Browser button to apply a filter to the analysis. For example, you may want to filter the analysis to include only pupil/students who are **Travellers**. For more information, please refer to the *Entering and Reviewing Data Using Marksheets* chapter in the *Administering Assessment* handbook.

> *NOTE: Any analysis set up for display in an **Assessment Summary** panel is saved on the SIMS **Home Page** and does not affect the analysis grids in SIMS Analysis.*

5. Select the **Outcome Type** from the drop-down list. For more information, please refer to the *Getting Started with SIMS Analysis 7* chapter in the *Analysis in SIMS* handbook.
6. Select the **Rounding On** check box to apply rounding to the analysis results. For more information, please refer to the *Viewing and Editing an Analysis* chapter in the *Analysis in SIMS* handbook.
7. To clear the display and remove all of the filters, click the **Clear Selection** button.
8. Click the **Apply** button to save the panel configuration and return to the SIMS **Home Page**. Any changes to the configuration are implemented immediately.
9. Repeat this process for any other instances of the **Assessment Summary** panel that you have elected to display on your Home Page.

   When you return to the SIMS **Home Page**, the panel name changes to the name of the analysis selected in Step 2.

More Information:
Adding Panels to the Home Page on page *52*
Viewing the Assessment Summary on page *43*

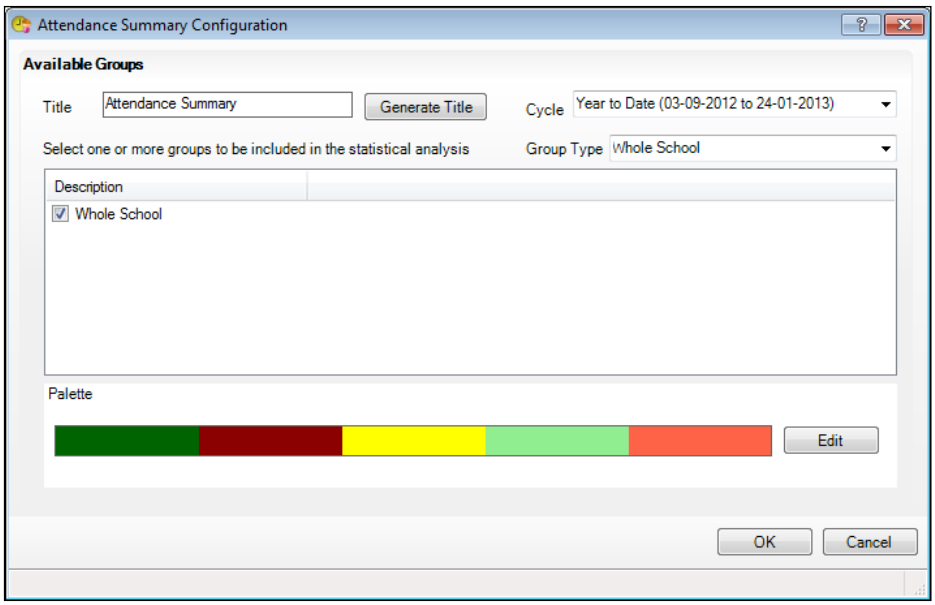
Editing the Chart Colour Scheme

It is possible to edit the colour palette so that each segment of a chart displayed in a summary panel can be coloured differently. This functionality affects the Attendance Summary and the Conduct Summary panels.

This section assumes that the colours on the **Attendance Summary** panel are being configured and that the panel has already been selected to display on the Home Page (please see *Adding Panels to the Home Page* on page *52*). The functionality available in the **Conduct Summary** panel, relating to colour selection, works in the same way as it does in the **Attendance Summary** panel. The only difference is the wider range of palette colours that can be displayed on the graph.

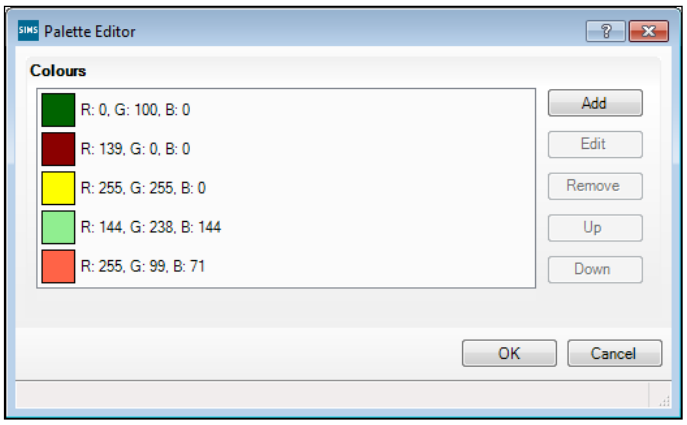
1. Click the **Options** button then select **Configure** from the pop-up menu to display the **Attendance Summary** dialog.

Options button



The colours displayed in the **Palette** section at the bottom of the dialog are the colours that are currently allocated to the graphs displayed in the **Attendance Summary** panel(s) on your Home Page. By default, Attendance Summary panels have five colours available immediately and Conduct Summary panels have 25 colours.

2. To edit the colours you wish to use, click the **Edit** button to display the **Palette Editor**.



3. Add a new colour to the palette by clicking the **Add** button to display the **Color** dialog, select the required colour then click the **OK** button. Alternatively, edit an existing colour by highlighting it, clicking the **Edit** button, selecting the required colour then clicking the **OK** button. The new or edited colour is displayed in the list of **Colours** in the **Palette Editor** dialog.
4. To remove a colour from the palette, highlight it then click the **Remove** button.

   The display order of the colours can be amended, which in turn changes the meaning of the colour on the graph displayed on the summary panels.

5. To switch the order in which the colours are displayed (working downwards from the right-hand side of the pie chart, or working from left to right on the bar chart), click the **Up** and **Down** buttons. To remove a colour, highlight the colour and click the **Remove** button.
6. Click the **OK** button to confirm the colour changes.

> *NOTE: When removing colours from the **Attendance Summary** pie chart, be aware that it is advisable to have at least the same number of colours as data types, otherwise existing colours may be used twice and could merge, making two segments appear as one.*

7. Click the **OK** button to return to the **Home Page**.

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