

## Getting Started with SIMS

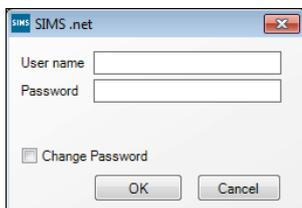
SIMS supports schools in the management of their statutory returns, raising standards of achievement and pupil/student attainment, managing finances and sharing good teaching practices.

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

## Logging in to SIMS

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

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



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



3. Click the **OK** button to log in to SIMS and display the **Home Page**.

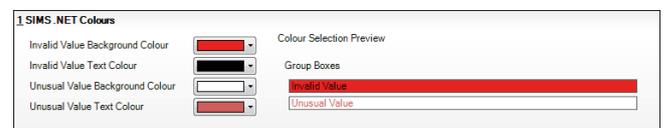
## Customising the User Interface

## Changing the Colour Scheme

Field font and background colours can be changed according to your requirements.

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

Colours can be selected for **Invalid Value Background**, **Invalid Value Text**, **Unusual Value Background** and **Unusual Value Text**.



2. Click the drop-down arrow in the colour field that you want to change and select a colour from the **Choose a color** dialog.
3. Click the **Save** button.

## Adding a Background Image to the Main Menu

It is possible to personalise the background for when all windows are closed (including the **SIMS Home Page**).

1. Select **Tools | Setups | User Options** to display the **Customisation Options** page, then navigate to the **External Files** panel.



3. Click the **Browser** button adjacent to the **Background Image for Main Menu** field.
4. Locate and highlight the required image, then click the **Open** button.
5. Click the **Save** button.
6. Restart SIMS to apply the change.

## Using the SIMS Home Page

The **SIMS Home Page** is displayed automatically each time you log into SIMS and provides an overview of the key content in your SIMS system, such as your timeline, the School Diary, your messages and group summary information (admissions, attendance, conduct and assessments).

The main toolbar provides access to commonly used functionality in SIMS. These buttons act as shortcuts to functionality that can otherwise be accessed via the menu system.

Configure, print, toggle views, etc. of individual widgets by selecting the required option from the **Options** drop-down menus.

Most widgets can be increased to full screen mode by clicking the **Expand** button, enabling you to view more information. The widget can be reduced to normal size by clicking the **Restore** button.

The **Configure** button enables you to set up the number, layout and order of the widgets on the **SIMS Home Page**.

A wide range of user documentation is available by clicking the **Documentation** button. Click the **Help** button on any page to display help content relevant to the page.

The **More...** hyperlink is displayed on panels when more information is available.

Many widgets refresh automatically at regular intervals. It is possible to manually refresh a widget by clicking the **Refresh** button.

The pupil/students who make up each of the categories on a chart can be viewed by double-clicking the required segment.

Access other areas of SIMS by selecting from the Menu Bar.

Search for pupil/students, staff, contacts, etc. using the **Quick Search** field by entering the required search criteria and clicking the **Search** button.

For Class Teachers and Teaching Assistants, the **My Timeline** widget displays a timeline of classes you will be teaching over the selected period.

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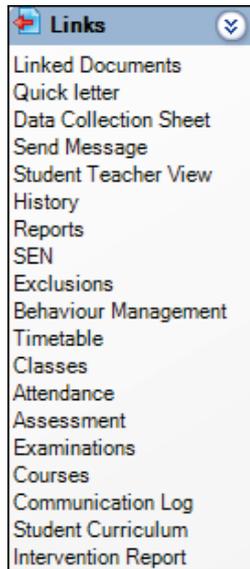
## Using the Links Panel

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

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

**IMPORTANT NOTE:** The options displayed depend on your location in SIMS.

The **Links** panel can be hidden or restored by clicking the **Hide/Show the Links Panel** button, situated on the right-hand side of the toolbar. The **Links** panel can be expanded or contracted by clicking the minimise/maximise icon. The appearance of the button changes depending on its current state.



## Running the Quick Letter

Basic letters to a pupil/student's parent/guardians can be produced, saved and printed by clicking the **Quick letter** hyperlink. This opens Microsoft® Word with a predefined letter template selected. The template provides the relevant salutation and address information for the selected pupil/student's parent/guardians.

## Running the Data Collection Sheet Report

Clicking the **Data Collection Sheet** hyperlink and then double-clicking the required report displays a report that lists all of the pupil/student related data for checking and confirmation (including medical information) by a contact with parental responsibility.

## Using the Quick Search Function

The SIMS **Home Page** enables you to search for and select a person recorded in SIMS (i.e. a pupil/student, member of staff, contact, applicant or agent) using the Quick Search functionality.

You can search for a person using their name, admission number, candidate number, telephone number, address, email address, UPN, UCI or vehicle. The search facility is not case-sensitive.

Enter the required search criteria, then click the **Quick Search** button.

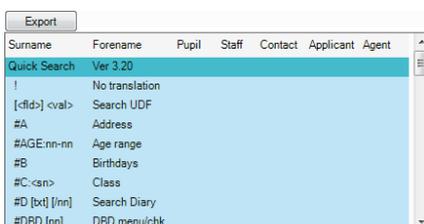
Click the **Export** button to export the results to Microsoft® Excel.

## Applying Filters

The Quick Search functionality enables you to enter filters, which can be used to further refine the results of a search, e.g. to display all females with a name containing Smith.

These filters, which start with the # symbol, are used to filter name searches. For example, #F searches for females only. You can use as many filters in a search as is required.

Enter **help**, then click the **Quick Search** button to display filter options.



## Permission and Licensing Requirements

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

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

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

## Accessing and Using the SIMS Documentation Centre

There is a wide range of user documentation available to SIMS users. This is accessed by clicking the **Documentation** button on the SIMS **Home Page**.

Click this button to launch the SIMS **Documentation Centre** in your default web browser. The **Documentation Centre** displayed is appropriate to your school type, e.g. English Primary. Release notes, handbooks, tutorials, Quick Reference Sheets, FAQs, etc. are available.



Search for specific information by entering the search criteria in the box on the right-hand side of the page, then click the adjacent **Search** button. Searching for an exact phrase in quotation marks narrows your search.

The toolbar along the top of the page provides links to various documentation output types. Alternatively, click the name that best matches your role in the school to display user documentation that is tailored to your role.

The footer of the **Home** page provides links that enable you to contact the SIMS Publications team, contact Capita Education Software Solutions, subscribe to the SIMS newsletter and connect with the SIMS team via social media.

Alternatively, go to the My Account website to access PDF and Word versions of the documentation (<https://myaccount.capita-cs.co.uk>).

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