

# Setting up Reminders and Sending Messages

Reminders are SIMS generated messages that prompt you about impending deadlines, e.g. SEN reviews, forthcoming medical events (such as immunisations), etc. You can specify which reminders to set, together with the number of days prior to the event that you want to be notified.

Reminders will appear in the **My Reminders** panel on your **Home Page**.

In addition, you can send to another SIMS user messages that relate to a specific pupil/student.

Messages are displayed in the **My Messages** panel on the **Home Page**.

*NOTE: The SIMS InTouch software provides enhanced messaging functionality.*

For more information on SIMS InTouch, please refer to the SIMS InTouch handbook. This handbook is available from the SIMS Documentation Centre, accessed by clicking the **Documentation** button on the SIMS Home Page. Once open, click the **Handbooks** button, click the **Maintaining Pupil/Student Information** button then click **SIMS InTouch**.

**My Messages Panel**  
Displays any messages sent to you from another SIMS user.

**Documentation Button**  
Click to access the Documentation Centre, where a wide variety of information is available.

**Configure Button**  
Click to configure the panels displayed on the SIMS Home Page. Panels can be added, removed and repositioned, if required.

**Maximise Button**  
Click to expand the panel to full screen view.

**My Reminders Panel**  
Displays any reminders set to notify you of upcoming deadlines.

## Setting up Reminders

Select **Focus | Alerts | Setup Reminders** to display the **Setup Reminders** dialog.

A selected check box indicates that a reminder has been set.

The **Days in Advance** column displays the number of days prior to the event that a reminder will be generated.

The **Days in Advance** cell is displayed with a red background until the number of days has been specified for an active reminder. If you click the **OK** button without completing the number of days, a prompt is displayed in the bottom left-hand side of the dialog.

### Setting Student Related, SEN and Admission Reminders

*NOTE: Admission reminders are only visible to schools where the Basic or Full Admissions licence has been applied.*

1. Select the **Active** check box adjacent to the **Event Name** that you wish to be reminded of. The background of the adjacent **Days in Advance** cell changes to red, indicating that the days need to be populated.
2. Enter the number of **Days in Advance** that you wish to be reminded of the event.

### Setting Attendance Reminders

1. Select the **Active** check box adjacent to the **Event Name** of which you wish to be reminded, e.g. **Extra Names**.
  2. Select the **Frequency** of the reminder, e.g. **Weekly**, then select the required **Date/Day** from the drop-down lists.
- When all required reminders are set, click the **OK** button.

*NOTE: To generate a reminder, the event type must be marked as **Active**. To switch off the reminder, deselect its **Active** check box.*

## Reading Reminders

When an item is clicked in the **My Reminders** panel on the **Home Page**, the dialog displayed depends on the type of reminder selected.

If a reminder for a personal task is being viewed, the **Edit Personal Task** dialog is displayed, enabling its details to be edited.

1. If any dates need to be changed, edit the existing date or click the **Calendar** button then select the required date from the Calendar.

2. Additional information can be recorded in the **Notes** field, if required.
3. If you want the reminder to be recorded to your school diary as well, select the **Add To Personal Diary** check box.

4. Click the **Print Report** button to display the personal task details in your web browser, e.g. Internet Explorer, from where it can be printed, if required.
5. Click the **OK** button.

If any other type of reminder is being viewed, e.g. system-defined reminders (as seen in the **Setup Reminders** dialog via **Focus | Alerts | Setup Reminders**), the **Read Reminder** dialog displays its details in read-only format.

The reminders are grouped into events, e.g. all the pupil/students whose free school meal eligibility runs out within the timeframe specified when the reminder was set up.

1. Click the **Print** button to display the reminder in your web browser, from where it can be printed, if required.
2. Double-click anywhere on the reminder to display the associated pupil/student's record, e.g. **Pupil** (or **Student**) **Details** page, etc. depending on the type of reminder.

The reminder remains displayed in the **My Reminders** panel until such time as it is deleted by clicking the **Delete** button.

# Setting up Reminders and Sending Messages

## Maintaining Reminders and Messages

1. Click the **Maximise** button in the top right-hand corner of the required panel to enlarge the panel to a full screen display.

 Maximise button

An example of a maximised **My Reminders** panel is shown in the following graphic.

Clicking the **Send Emergency Alert** button enables a class teacher to request immediate assistance as a result of an emergency in the classroom. This button is always displayed in the top right-hand corner of the main toolbar. For more information, please refer to the *Setting up and Administering SIMS* handbook.



To print a report, click the **Options** button then select **Print**. The report is displayed in your web browser, from where it can be printed, if required.

The options available via this button depend on which panel is expanded.

Click the **Restore** button to restore the panel to its original size and position on the **Home Page**.

 Restore button

2. Double-click a record or highlight the record then click the **Open** button to display related information.
3. A record can be deleted (providing it has been read) by highlighting the record then clicking the **Delete** button. The record is deleted permanently.
4. To restore the panel display, click the **Restore** button (located on the right-hand side of the page).

## Sending a Pupil/Student Related Message

It is possible to send messages to other SIMS users from a variety of pupil/student related screens, e.g. **Student SEN details, Pupil (or Student) Details, Exclusion Details, Student Behaviour Management**, etc.

1. Click the **Send Message** hyperlink in the **Links** panel to display the **Send Message** dialog.

The message is populated automatically with information about the selected pupil/student.

2. Select the required recipient(s) by clicking the **Add** button in the **Recipient** panel to display the **Select Recipients** dialog. Search for then highlight the required recipient(s) and then click the **OK** button.

3. A default message **Type** and **Priority** are displayed but these can be changed by selecting from the drop-down lists.

4. The **Subject** field is populated automatically but can be edited, if required.

5. Enter the **Message** text then click the **Send** button to deliver the message to the selected recipient(s).

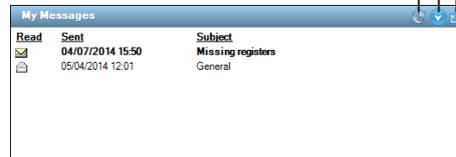
The sent message will be displayed on the recipient's **SIMS Home Page**, either when they log in to SIMS or when the refresh rate specified has elapsed (configured via the **Options** button in the **My Messages** panel).

## Reading and Responding to a Message

Click to expand the panel

Click to print or configure the message data

Click to refresh the message data



The **My Messages** panel on the **Home Page** displays any messages sent to you by other SIMS users and also system messages, if a message that you have sent to another SIMS user cannot be delivered.

1. Click the message you wish to view to display the **Read Message** dialog.

Details of the **Sender** and the **Recipient(s)** are displayed in the applicable panels.

An additional panel (**Student**) is displayed if the message is relating to a pupil/student.

The panel displays their name, gender, year group and registration group.

2. The message can be printed or deleted from this dialog, if required. The message remains in the **My Messages** panel until it is deleted.

3. Click the **Reply** (or **Reply To All**) button to display the **Reply Message** dialog, from where you can respond to the message, if required. Alternatively, click the **Close** button to return to the **SIMS Home Page**.

## Replying to a Message

If you click the **Reply** button, the **Recipient(s)** panel displays the name of the originator only. If you click the **Reply To All** button, all recipients of the original message are displayed.

1. To include additional people in the response, click the **Add** button in the **Recipient(s)** panel to display the **Select Recipients** dialog.

2. Search for then highlight the required person. Multiple people can be selected by holding down the **Ctrl** key and clicking the required names.

3. Click the **OK** button to display the selected recipient(s) in the **Recipient(s)** panel.

*NOTE: To remove a member of staff, highlight them in the **Recipient(s)** panel then click the **Remove** button.*

4. Enter the **Message** text in the gap above the original message.
5. Click the **Send** button.

# CAPITA

Capita SIMS, Franklin Court, Priory Business Park, Cardington, Bedfordshire MK44 3JZ  
Tel: 01234 838080 Fax: 01234 832036 Email: info@capita-sims.co.uk Web: www.capita-sims.co.uk

© Capita Business Services Ltd 2014. All rights reserved. No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated or transmitted without the express written consent of the publisher.

Version 7.158 - 1.0

Release Date: 23/09/2014