

# CAPITA | SIMS 2011 Summer Release

## SIMS 7.140

### Contents

Welcome to the SIMS 2011 Summer Release .....	4
Important Information Regarding Microsoft .NET Framework 4 Extended .....	7
Important Information – Please Read <u>before</u> Upgrading ..	7
Included in this Release.....	11
Admissions.....	12
Analysis .....	12
Assessment.....	13
Attendance.....	13
Course Manager .....	14
Cover .....	14
CTF.....	15
DENI/Leavers Return 2011 (Northern Ireland) .....	16
Dinner Money.....	16
Examinations Organiser 6.84 .....	17
FMS.....	18
Fees Billing .....	19
InTouch .....	20
Lesson Monitor.....	21
Personnel.....	22
Post 16 Autumn Return 2011 (Wales) .....	23
Profiles .....	23
Reporting.....	23
School Census Autumn Return 2011 .....	25
School Workforce Census Return 2011 .....	27
SIMS Learning Gateway .....	28
SOLUS <sup>3</sup> Phase 4 .....	29
STAR.....	29
System Manager 6 .....	30
System Manager 7 .....	30

# CAPITA | SIMS 2011 Summer Release

SIMS 7.140

Updated Handbooks Available with this Release..... 31

Please read this release note carefully before installing or upgrading your software. Do not attempt any installation or upgrade without first making a fully restorable, verified backup of your SIMS system.

Capita SIMS has made this release note available in both Microsoft® Word format (available from SupportNet) and PDF format to enable Local Authorities to edit the information supplied herein. Capita SIMS cannot be held responsible for any changes, errors or omissions resulting from the subsequent editing of this supplied document.

Release Note Version	Change Description	Date
1.0	Initial release	11/07/2011

## Welcome to the SIMS 2011 Summer Release

The SIMS 2011 Summer Release (7.140) includes the following new functionality:

- **Attendance/Lesson Monitor**

A new report (Group Analysis by Vulnerability) produces analysis of session attendance based on the selected vulnerability factor. Extra STAR fields have been added to the Group Analysis by STAR Field report.

For more information, please see *Attendance* on page 13 and *Lesson Monitor* on page 21.

- **Cover/Personnel**

Enhancements have been made to the relationship between Cover and Personnel for staff absences and staff leavers. New functionality enables staff absences for the same absence type that have been recorded in Cover to become one absence record in Personnel, e.g. rather than having five one-day absences, the absence will be extended and recorded as one five-day absence in Personnel.

For more information, please see *Cover* on page 14 and *Personnel* on page 22.

- **Dinner Money**

New functionality enables meal price changes to be backdated. This also enables the re-processing of current balances in line with the price changes.

For more information, please see *Dinner Money* on page 16.

- **Examinations Organiser 6.84**

Enhancements enable additional validations on non-EDI screens. Amendments have been made to Performance Tables. A new data field has been provided in SIMS Reporting to identify **Non EDI Results**. A new report has been provided for schools in Northern Ireland, which details all AS results for students in Years 13 and 14.

For more information, please see *Examinations Organiser 6.84* on page 17.

- **FMS 6.140**

A new user interface has been introduced to FMS (excluding Accounts Receivable and Equipment Register). All existing dates and functionality are maintained, although modifications have been made to the order of the icons in Accounts Payable. The Bank Claim report is now accessible from the **Reports** menu.

You can now hide Inactive Suppliers from the **Purchase Order** and **Invoice/Credit Note** pages. This removes the possibility of these types of supplier being selected in error.

The synchronisation of rooms that have been defined in SIMS and those held in the Equipment Register has been enhanced. Consequently, whenever a room is deleted in SIMS, all equipment associated with the deleted room in the Equipment Register will have their associated room removed from their record. In these instances, messages are displayed and the deletions are recorded in the Audit Trail.

For more information, please see *FMS* on page 18.

#### ■ **InTouch**

Customers using InTouch should not apply the SIMS 2011 Summer Release yet but will instead be contacted and informed when to take an updated SIMS 2011 Summer Release.

A number of enhancements have been made to facilitate the use of InTouch, including the ability to bulk update email addresses and mobile telephone numbers for contacts and students. You can now report on key behaviour criteria and send this information out via InTouch. From Take Register, you can now send bulk emails. Group selection and the ability to add a year group are now included in Unexplained Absence Management.

For more information, please see *InTouch* on page 20.

#### ■ **STAR**

SEN functionality has been enhanced to enable you to record and view the chronological changes to both the SEN status level and individual prioritised needs. The new CTF Matching routine enables you to define how a record in a CTF is imported into SIMS. You can select a record in the CTF that matches a record in your SIMS database, then update the SIMS database with any missing details. The method used to match a record in the CTF with a record in the SIMS database can be changed, enabling you to be as strict or as flexible as necessary.

For more information, please see *STAR* on page 29.

#### ■ **System Manager 7**

New software facilitates the management of user access and permissions in SIMS.

For more information, please see *System Manager 7* on page 30.

## Statutory Returns Included with this Release

This release provides you with the functionality required to complete the following returns:

- **DENI/Leavers Return 2011 (Northern Ireland Schools only)**

Includes the functionality required to complete the DENI and Leavers Return 2011.

For more information, please see *DENI/Leavers Return 2011 (Northern Ireland)* on page 16.

- **Post 16 Autumn Return 2011 (Wales Secondary Schools only)**

Includes the functionality required to complete the Post 16 Autumn Return 2011.

For more information, please see *Post 16 Autumn Return 2011 (Wales)* on page 23.

- **School Workforce Census Return 2011**

Includes the functionality required to complete the annual School Workforce Census Return 2011.

For more information, please see *School Workforce Census Return 2011* on page 27.

- **School Census Autumn Return 2011**

Includes the functionality to produce the School Census Autumn Return 2011.

For more information, please see *School Census Autumn Return 2011* on page 25.



***IMPORTANT NOTE for Secondary Schools with a Sixth Form:***

*We recommend that all schools with a sixth form run the Duplicate QAN Report (via **Tools | Statutory Return Tools | Duplicate QAN Report**) before finalising their Autumn Return. This report identifies each course that has the same QAN plus Discount Code as another course. Such duplicate use of QAN plus Discount Code is justified under certain conditions, e.g. a normal course and a retake, but is never justified for courses that have any members in common at any point, e.g. AS and A2 Chemistry.*

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## Important Information Regarding Microsoft .NET Framework 4 Extended

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**IMPORTANT NOTE:** Microsoft .NET Framework 4.0 Extended is a prerequisite for SIMS for the SIMS 2011 Summer release. Computers (workstations or Servers) without this software cannot run SIMS.

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If you do not have Microsoft .NET Framework 4.0 Extended installed on your computer, the SIMSLoad.exe or pulsar.exe files will not run and no error message is displayed.

If you are running an incorrect version of .NET 4.0, the following error message is displayed:

**This application requires the full version of the Microsoft .NET Framework 4, which includes both the Client Profile and Extended components. Please contact a system administrator or your local support service.**

## Important Information – Please Read before Upgrading

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**WARNING:** Please note that there is a known issue with InTouch in the SIMS release which means that customers using InTouch should not upgrade to the SIMS 2011 Summer Release yet. We will be contacting all InTouch customers and will be posting a news item on SupportNet informing InTouch customers when they can upgrade to the Summer Release. It is envisaged that this will be w/c 18<sup>th</sup> July 2011.

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**IMPORTANT NOTES:** It is recommended that the SIMS 2011 Summer Release is applied to existing installations by running SOLUS on the SIMS SQL Server.

The SIMS 2011 Summer Release is compatible with Microsoft SQL Server 2008 editions. Microsoft SQL Server 2005/SQL Express 2005 are no longer supported. You must upgrade to Microsoft SQL Server 2008/SQL Express 2008 before applying this release. Failure to do so will result in you not being able to apply the SIMS 2011 Summer Release.

If your school uses both Fees Billing and FMS, SIMS and FMS must be upgraded at the same time.

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## Generic Reporting

The content of the report output generated by clicking the **Print** button on any browser or detail page in SIMS displays only the information that is visible on-screen.

For example, from the **Detention Details** page (**Focus | Behaviour Management | Maintain Detentions**), clicking the **Print** button produces a report containing only the information displayed on this screen.

## Where to Find More Information

Release notes for previous releases can be obtained by clicking the appropriate menu link on the Home page of our SOLUS website (<http://www.capita-cs.co.uk/solus>).

All handbooks referred to throughout this release note can be obtained from any of the following locations:

- The **Documentation** button on the **Home Page** in SIMS. Once open, click the **Handbooks** button, select the required category then click the required handbook on the **Handbooks** page.
- SupportNet – copies of all handbooks are posted to SupportNet (<http://support.capitaes.co.uk>) and can be obtained by clicking the **Documentation** button on the Home page, then selecting **SIMS Handbooks** from the **Category** drop-down list and clicking the **Search** button.
- Copies of handbooks are now installed on the Central SIMS File server as PDFs and can be found in the S:\SIMS\Documentation folder (where S: indicates the location of your SIMS File server). Double-click the required PDF name to open the handbook.

If you are unable to obtain the required handbook using any of these methods, please email [publications@capita.co.uk](mailto:publications@capita.co.uk) and we will be pleased to email a copy to you.



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## Upgrading Using SOLUS

The SIMS Online Update Service (SOLUS) enables you to download and run SIMS releases and patches via the Internet. This is achieved using SOLUS3 or the SOLUS2 Wizard.

For instructions on carrying out an upgrade with SOLUS3, please refer to the *SOLUS3 for System Administrators* handbook.

For instructions on carrying out an upgrade with SOLUS2, please refer to the *SIMS SOLUS Wizard 2 User Guide*, which is available from the SOLUS website (<http://www.capita-cs.co.uk/solus>).

## Backing up SIMS and FMS

Where SIMS Personnel is used to generate Salary Projections in FMS, SIMS and FMS backups should be carried out at the same time. If one of the databases needs to be restored, the other database must be restored to the same point, i.e. if you restore the SIMS database, you must restore the FMS database to the same point and vice versa.



**IMPORTANT NOTE:** Backups are no longer zipped, because of the number of issues caused by zipping backup files. Recent operating systems now allow the use of compressed folders, which are recommended for automatically compressing backups. Please refer to your operating system documentation for instructions on applying compression to a folder.

## Permissions

A permissions spreadsheet listing all permissions relating to SIMS 7.138 can be accessed from our SupportNet website (<http://support.capitaes.co.uk>). Enter PERMLIST in the **Site Search** field then click the **Go** button.

## Pre-Defined Reports

One new pre-defined reports has been created, the SWC Annual 2011 report, and is accessed via **Reports | Run Report | Focus | Staff**. This lists staff details that will included in the School Workforce Census Return.

For more information, please refer to the *Pre-Defined Reports Catalogue*.

## B2B – Compatibility Between One and SIMS

As part of the SIMS 2011 Summer Release, we have undertaken full testing of both B2B:Student and B2B:Personnel to ensure compatibility with One.

The following table indicates the compatibility between SIMS and One from the SIMS 2011 Spring Release to present.

		One Release Version		
		3.42 (December 2010)	3.43 (March 2011)	3.44 (June 2011)
SIMS Release Version	7.138 (Spring 2011)	✓	x	x
	7.140 (Summer 2011)	✓	✓	✓

## Version Support for FMS

The FMS support arrangements depend on the supported versions of SIMS where Personnel Links is being used. Support for FMS SQL Server is detailed in the following table.

Release	SIMS Version	FMS Version	FMS with Personnel Links	FMS without Personnel Links
Current version	7.140	6.140	6.140	6.140
Minimum version	7.138	6.138	6.138	6.138

## SLG Compatibility

SLG is guaranteed to support the previous two releases of SIMS, inclusive of any release it is shipped with.

## Supported SIMS Versions with SLG Summer Release

The SIMS Learning Gateway Summer Release can be used alongside the following versions of SIMS:

- SIMS 2011 Summer Release (SIMS 7.140)
- SIMS 2011 Spring Release (SIMS 7.138)



**IMPORTANT NOTE:** If you install the SIMS 2011 Summer Release (SIMS 7.140) and continue to run an older release of SLG, this is not guaranteed to work and is therefore not supported.

## Supported SIMS Versions with PX Summer Release

The SIMS PX Agent should be upgraded to the PX 2011 Summer Release immediately after, or in conjunction with, upgrading to the SIMS 2011 Summer Release.



**IMPORTANT NOTE:** If you install the SIMS 2011 Summer Release (SIMS 7.140) and continue to run an older release of the PX Agent, this is not guaranteed to work and is therefore not supported.

## Acrobat Reader 8 and the SIMS 2011 Summer Release

Adobe® Reader version 8 or above must be installed before you can read any of the user documentation.



**NOTE:** If you already have Adobe Reader version 8 or above installed, it is not necessary to upgrade to a later version in order to read the user documentation.

## Included in this Release

This release includes new features, fixes and enhancements in the following areas:

- Admissions
- Analysis
- Assessment
- Attendance
- Course Manager
- Cover
- CTF
- DENI/Leavers Return 2011 (Northern Ireland)
- Dinner Money
- Examinations Organiser 6.84
- Fees Billing
- InTouch
- Lesson Monitor
- Personnel
- Post 16 Autumn Return 2011 (Wales)
- Profiles
- Reporting
- School Census Autumn Return 2011
- School Workforce Census Return 2011
- SIMS Learning Gateway
- SOLUS<sup>3</sup> Phase 4
- STAR
- System Manager 6
- System Manager 7

## Admissions

### Enhancements

This release includes an enhancement in the following area:

- The ability to import an ADT file version 8.1 (2011/2012).
- The ability to export an ASL file version 8.1 (2011/2012).

### Fixes

This release includes fixes in the following areas:

- The Projected Student Numbers report no longer displays inactive admissions (via **Reports | Admissions | Projected Student Numbers**).
- When deleting an admitted application record, the ULN is no longer removed from the Student's record (via **Focus | Admission | Application**).
- It is now possible to delete old pre-admission groups that contain applications with a status of either **Admitted** or **Withdrawn** (via **Routines | Admission | Admission Groups | Setup**).
- Any changes to the **Chosen Forename** on an Enquiry or Applicant record is now saved when you click the **Save** button (via **Focus | Admission | Enquiry**).

## Analysis

### Fixes

This release includes a fix in the following area:

- Tracking Grid templates can now be imported and modified (via **Routines | Data In | Performance Analysis | Import**).

## Assessment

### Fixes

This release includes fixes in the following areas:

- It is now possible to return to Individual Reports via the menu system after selecting another menu route in SIMS (via **Focus | Assessment | Individual Report**).
- It is now possible to select a group filter for a marksheet (via **Focus | Assessment | Marksheet Entry** and **Focus | Assessment | Template**).
- The grade (instead of the grade value) is now displayed on the marksheet (via **Focus | Assessment | Template**).
- The column order on a marksheet no longer changes when the marksheet is printed (via **Focus | Assessment | Template**).
- If you change the font size of a coloured cell on a marksheet, the new font size is displayed correctly when the marksheet is printed (via **Focus | Assessment | Template**).

## Attendance

### New Features

This release includes the following new features:

- **Group Analysis by Vulnerability Report**

**Reports | Attendance | Group Reports | Group Analysis by Vulnerability Report**

This produces analysis of session attendance based on the selected vulnerability factor.

Report options include the ability to show boys and girls separately, show values as either numbers or percentages and report on up to two extra codes.

- **Group Analysis by STAR Field Report**

**Reports | Attendance | Group Reports | Group Analysis by STAR Field Report**

Extra STAR fields have been added to the Group Analysis by STAR Field report. These additional STAR fields include vulnerability fields, which can also be reported on by running the new Group Analysis by Vulnerability report, described previously.

For more information, please refer to the *Producing Group Reports* chapter in the *Producing Attendance Reports* handbook.

## Fixes

This release includes fixes in the following areas:

- It is now possible to select the **Marksheet** tab in **Take Register** (via **Focus | Attendance | Take Register**).
- The Today's Register report now displays the correct title for all teachers (via **Reports | Attendance | Whole Group Pupil (or Student) Reports | Today's Register Report**).
- The pupil/student's parental contact telephone number now displays correctly (via **Reports | Attendance | Individual Pupil (or Student) Reports | Registration Certificate Report**).
- A whole day's attendance is no longer greyed out when a half-day INSET session is scheduled (via **Focus | Attendance | Take Register**).

## Course Manager

### Fixes

This release includes a fix in the following area:

- DAS Generic QANs are now available from the **Classification** panel on the **Course Details** page (via **Tools | Academic Management | Course Manager | Maintain Course**).

## Cover

### New Features

This release includes the following new features:

- **Improvements to the Staff Absence Process**

Improvements have been made to the process for recording absences in Cover. It is now possible to 'extend' an initial period of absence instead of creating separate records for each day of an absence, to create a continuous period of absence.

For more information, please refer to the *Setting up Reasons, Rules, Rotas and Other Settings* chapter in the *Cover in SIMS* handbook.

- **Managing Staff Leavers**

**Tools | Cover | Manage Staff Leavers**

Cover erroneously allows you to use staff leavers to provide cover after their date of leaving, to add bookings and to register absences after their date of leaving. To enable the Cover Manager to view and remove any mismatches between this erroneous data and a staff member's date of leaving, a new menu route has been provided.

A number of other issues relating to staff leavers have been addressed to improve the consistency and accuracy of information in both Cover and Personnel. Staff members who have been assigned a date of leaving can be identified by a (\*) symbol.

For more information, please refer to the *Recording Staff Absences and Room Closures* chapter in the *Cover in SIMS* handbook.

#### ■ **Cover Diary Pagination Feature**

A new setting has been provided via **Tools | Cover | Global Settings** that enables you to specify the number of staff absence and room closure records that are displayed on the Cover Diary at a time. You can now page backwards and forwards to view multiple records using the **Next** and **Previous** buttons on the Cover Diary.

## Fixes

This release includes fixes in the following areas:

- Students who are absent on Approved Education Authority Codes are no longer displayed on Cover Slips (via **Focus | School | Arrange Cover**).
- An error no longer occurs when adding a booking on the Cover Diary (via **Focus | School | Arrange Cover**).
- Leavers are no longer included on Cover Slips (via **Focus | School | Arrange Cover**).
- If the room scheduled for a class is changed, the change is now recognised correctly (via **Tools | Cover | Detect Timetable Changes**).

## CTF

### New Features

This release includes the following new feature:

#### ■ **CTF Match and Import Screen**

The CTF import process now enables you to define how a record in a CTF is imported into SIMS. It also enables you to select a record in the CTF that matches a record in your SIMS database then update the SIMS database with any missing details.

The method used to match a record in the CTF with a record in the SIMS database can be changed, enabling you to be as strict or as flexible as necessary.

After installing the SIMS 2011 Summer Release, you will need to apply licence patch **15724** in order to obtain the CTF Matching and Import screen. If the licence patch is not applied, the original Import CTF functionality is available but not the CTF Matching screen.



**IMPORTANT NOTE:** The functionality provided by the **Match and Import** panel is entirely optional. If you do not wish to use this enhanced functionality, you can continue to import a CTF using the original method by clicking the **Import CTF** button in the new **Match and Import** panel without making any changes in this panel.

For more information, please refer to the *Managing Pupil/Students in SIMS* handbook.

## Fixes

This release includes a fix in the following area:

- When importing CTFs, commas now display correctly (via **Routines | Data In | CTF | Import CTF**).

## DENI /Leavers Return 2011 (Northern Ireland)

The DENI Return 2011 incorporates the Department of Education Northern Ireland (DENI) requirements for the Census Return 2011 and Leavers Return 2011.

There are two returns:

- **Census Return** (incorporating data for School Performance)

This year's Census Return date is Friday 7 October 2011.

- **Leavers Return**

This year's Leavers Return date is Friday 18 November 2011. The Leavers Return menu is made available only after the export of the Census Return to the Education and Library Board (ELB) or DENI. It is produced approximately six weeks after the Census Return.

## Dinner Money

### New Features

This release includes the following new features:

- **Backdate Meals Processed**

**Tools | Dinner Money | BackDate Meals Processed**

The Backdate Meal process enables you to edit meal definitions and prices retrospectively within a specified date range, for new and existing year groups or classes.

- **Unlock Meal Processing**

**Tools | Dinner Money | Unlock Meal Processing**

This process enables you to remove the meal processing lock created by the Backdate Meals Processed routine.

For more information, please refer to the *Setting Up Dinner Money* chapter in the *Setting Up and Administering Dinner Money in SIMS* handbook.

## Fixes

This release includes a fix in the following area:

- The final page of the pupil payment list now prints correctly (via **Focus | Dinner Money | Pupil Payments**).

## Examinations Organiser 6.84

### Enhancements

This release includes enhancements in the following areas:

- Additional validations are now made on non-EDI screens:
  - The **Grade** field is three characters in length.
  - The **Key Stage 4** and **Level 3 Equivalence** fields can have no entry equivalent, providing points are zero.
- Amendments to Performance Tables:
  - New thresholds have been added to the KS4 and Post 16 reports for schools in Northern Ireland only.
  - A new option has been added to show students removed from the PI cohort and subsequently, the calculation of the report.
  - When run in **DfE Format**, an additional line (**Achieving English Baccalaureate**) is now visible directly beneath the **Number of Candidates** line in the Summary report output.
  - When run in **DfE Format**, an additional column (**EBacc**) is now visible after the **A\*-G** column in the Detailed report output.
- It is now possible to save the Subject Grade Analysis report with an .xml file extension.
- A new data field has been provided in SIMS Reporting to identify **Non EDI Results**.
- It is now possible to select the fields **KS4 M&E A\*-G** and **Level 3 A\*-E** from the **Performance Summary** focus in SIMS Reporting.
- A new report has been provided for schools in Northern Ireland, which details all AS results for students in years 13 and 14. This report can be located via **Reports | Results | DENI AS Summary**.

## Fixes

This release includes fixes in the following areas:

- A validation warning is no longer displayed when deleting basedata elements (via **Focus | Basedata**).
- It is now possible to manually edit results (via **Tools | External Results | Manual Entry**).
- An error no longer occurs when running the Unseated Candidates report (via **Reports | Seating Organiser | Unseated Candidates**).
- The **Toggle Global Exams Filter** check box now works correctly (via **Tools | Performance | Options**).

## FMS

### New Features

This release includes the following new features:

- **New User Interface**

A new user interface has been introduced in FMS (excluding Accounts Receivable and Equipment Register). All existing dates and functionality are maintained, although modifications have been made to the order of the icons in Accounts Payable. The Bank Claim report is now accessible from the **Reports** menu.

Spring 2011	Summer 2011
<b>Accounts Payable</b>	<b>Accounts Payable</b>
Suppliers	Suppliers
Purchase Orders	Purchase Orders
Invoices/Credit Notes	Deliveries
Cheque Processing	Invoices/Credit Notes
BACS Processing	Cheque Processing
Deliveries	BACS Processing
Import Transactions	Import Transactions
<b>Focus   General Ledger   Bank Claim</b>	<b>Reports   General Ledger   Bank   Bank Claim</b>

For more information on the new user interface, please refer to the *FMS New User Interface* guide. The FMS documentation is available from within FMS via the **FMS Documentation Centre**. This can be accessed by selecting **Help | FMS Documentation**. Once open, click the **Handbooks** button then click the document title.

- **Addition of a Hide 'Not In Use' Suppliers Check Box**

An additional check box has been provided, preventing suppliers from being displayed in a browser. The check box (entitled **Hide 'Not in Use' Suppliers**) is selected automatically to ensure that only current supplier details are offered for selection when creating new transactions (via **Tools | Establishment Details | System Parameters**)

Any changes to the **Hide 'Not in Use' Suppliers** check box status can be viewed in the Audit Trail.

For more information, please refer to the *Accounts Payable in FMS* handbook or the *Accounts Payable in FMS for Academy Schools* handbook.

- **Equipment Register**

The synchronisation of rooms that have been defined in SIMS and those held in the Equipment Register has been enhanced. Consequently, whenever a room is deleted in SIMS, all equipment associated with the deleted room in the Equipment Register will have their associated room removed from their record. In these instances, messages are displayed and the deletions are recorded in the Audit Trail.

For more information, please refer to the *Equipment Register* handbook.

## Fees Billing

### Fixes

This release includes fixes in the following areas:

- Re-admitted pupil/students are no longer displayed in the Aged Debtors report (via **Reports | Fees Billing | Transactions | Aged Debtors**).
- When exporting the Aged Debtors report, a charge reference (specified in the parameters) is now included (via **Reports | Fees Billing | Transactions | Aged Debtor**).
- Lookup values, which enable the production of the ISI Central Record, have been included in this release (via **Tools | Lookups | Maintain**).
- The correct charge codes are now reported when creating Previous Bill charge code report (via **Reports | Design Report**).

## InTouch

### New Features

This release includes the following new features:

- **Updating Primary Contact Details**

It is now possible to set a telephone number and email address to be the primary contact for pupil/student contacts, applicant contacts and pupil/students. It is also possible to update the contact details of these people using bulk update, an effective method of updating contact details en masse.

For more information, please refer to the *Updating Primary Contact Details* chapter in the *SIMS InTouch* handbook.

- **Message Priority Renamed to Message Importance**

The **Priority** of a message has been relabelled as the **Importance** of a message throughout SIMS InTouch.

- **Additional Filters for Unexplained Absence Management**

Individual groups can now be selected for analysis when sending a message for unexplained absences.

For more information, please refer to the *Managing System Generated Messages* chapter in the *SIMS InTouch* handbook.

- **Behaviour Notification Messages**

Messages can be sent to parental contacts and other interested contacts when a pupil/student has been involved in a behaviour incident. For example, you may wish to send a message to a parent/guardian or other contact if a pupil/student accumulates a total of 10 behaviour points. This enables your school to increase awareness among parental contacts of their child's conduct.

For more information, please refer to the *Managing System Generated Messages* chapter in the *SIMS InTouch* handbook.

- **Class Register Messages**

A Class Register Message can be created from the **Take Register** page and is therefore linked automatically to the selected pupil/student's record. When selecting the intended recipients, the search criteria **Category** defaults to show all people who are currently associated with the selected pupil/student (**Linked Adults**), including parental contacts, registration tutors and teachers.

For more information, please refer to the *Sending General Messages* chapter in the *SIMS InTouch* handbook.

## Enhancements

This release includes enhancements in the following areas:

- **Reducing the Number of Messages Sent**

In the case where a pupil/student has one or more siblings currently attending your school, SIMS InTouch now identifies whether a General Message would ordinarily be sent to a recipient more than once. If a recipient would ordinarily receive the message more than once (e.g. they would receive the same message three times if they have three children at your school), only a single message is now sent. This reduces the number of messages sent to a pupil/student contact and therefore reduces the cost of doing so.

- **Selecting message recipients from Fees groups**

If you have a licence for Fees Billing, it is now possible to send a message to fee recipients.

- **Searching My Groups**

Ability to search on **My Groups** of another staff member, i.e. groups of which that employee is a Supervisor or Main Supervisor.

## Lesson Monitor

### New Features

This release includes the following new features:

- **Group Analysis by Vulnerability Report**

**Reports | Lesson Monitor | Group Reports | Group Analysis by Vulnerability Report**

This produces analysis of session attendance based on the selected vulnerability factor.

Report options include the ability to show boys and girls separately, show values as either numbers or percentages and report on up to two extra codes.

- **Group Analysis by STAR Field Report**

**Reports | Lesson Monitor | Group Reports | Group Analysis by STAR Field Report**

Extra STAR fields have been added to the Group Analysis by STAR Field report. These additional STAR fields include vulnerability fields, which can also be reported on by running the new Group Analysis by Vulnerability report, described previously.

For more information, please refer to the *Producing Group Reports* chapter in the *Producing Lesson Monitor Reports* handbook.

## Fixes

This release includes fixes in the following areas:

- It is now possible to select the **Marksheet** tab in Take Register (via **Focus | Lesson Monitor | Take Register**).
- Marks now copy correctly for a double period (via **Focus | Lesson Monitor | Take Register**).
- The Percentage Attendance report now displays the correct results for withdrawn classes (via **Reports | Lesson Monitor | Selected Student Reports | Percentage Attendance Report**).
- A whole day's attendance is no longer greyed out when a half-day INSET session is scheduled (via **Focus | Attendance | Take Register**).

## Personnel

### New Features

This release includes the following new feature:

- **Associating a Person with a School Tier**

A teacher or a member of non-teaching staff can be linked to one or more school tiers via the Pastoral Structure. Once linked, they become known as an associate of a tier and this enables members of staff associated with a particular tier to be retrieved in person browsers throughout SIMS. The following new functionality is available:

- Ability to associate employee with one or more school tiers
- Ability to update teaching staff school tiers association
- Ability to filter staff (Teaching and non teaching) by school tier
- Ability to produce user defined staff reports that enables associated school tiers to be displayed and filtered
- Ability to select a school tier when running existing personnel reports
- Ability to report by school tier within the students lists reports

### Enhancements

This release includes the following enhancement:

- **Improvements to the Staff Absence Process**

Improvements have been made to the process for recording absences in Cover. Consequently, minor amendments have also been made in Personnel to consolidate the absence process between the two areas.

## Post 16 Autumn Return 2011 (Wales)

The dates for the Autumn Return 2011 are:

- **Census Day** – 20/09/2011
- **Age at** – 31/08/2011

## Profiles

### Fixes

This release includes fixes in the following areas:

- Comments are now displayed correctly for teachers who do not teach a particular pupil/student (via **Reports | Profiles | Missing Entries Report**).
- All pupil/students are now displayed correctly when generating pupil/student profiles in bulk (via **Focus | Profiles | Student Profiles**).
- Comments are no longer being duplicated for split membership records in List Entry (via **Focus | Profiles | Data Entry | List Entry**).
- The Percentage of Attendance tag now displays the correct figures (via **Focus | Profiles | Student Profiles**).

## Reporting

### Enhancements

This release includes enhancements in the following areas:

- **Student List Reports**

A new Data Area (**Academic**) is available for all Student List reports.

It is now possible to select a single class or registration group easily when running a Class List or Registration Group List report.

The output of all Student List reports now show figures for on-roll pupil/students and accepted applicants.

An additional range of data fields can be added to Student List reports, e.g. EAL, FSM, First Language, etc.

For more information, please refer to the *Producing Student List Reports* chapter in the *Producing Student List, Student Analysis and Timetable Reports in SIMS* handbook.

- **Student Analysis Reports**

It is now possible to enter an Effective Date when running Student Analysis reports.

The output of all Student Analysis reports now show figures for on-roll students and accepted applicants.

For more information, please refer to the *Producing Student Analysis Reports* chapter in the *Producing Student List, Student Analysis and Timetable Reports in SIMS* handbook.

#### ■ **Timetable Reports**

The minimum font size has been changed to 5 for Student Timetable reports.

The Main class teacher is now displayed on Student Timetable report outputs.

It is now possible to display, at the bottom of each page of a Student Timetable report, a key to the staff initials displayed on the report.

For more information, please refer to the *Producing Timetable Reports* chapter in the *Producing Student List, Student Analysis and Timetable Reports in SIMS* handbook.

## Fixes

This release includes fixes in the following areas:

- It is now possible to report on staff in User Defined Groups (via **Reports | Design Reports**).
- It is now possible to view all your private events and all public events when reporting on the school diary (via **Reports | Design Reports**).
- The main telephone number is now displayed correctly on the Data Collection Sheet report (via **Reports | Run Report | Focus | Data Collection Sheet**).
- It is now possible to sort report data by UPN and Local UPN (via **Reports | Design Report**).
- The class name is no longer truncated when it is selected in a class sub-report (via **Reports | Design Report**).
- The SEF B2.16 Looking After Children report can now be run in Microsoft Excel 2007 onwards (via **Reports | Run Report | Focus | Student**).
- For schools in Northern Ireland, the DENI number is now available for selection in the reporting dictionary (via **Reports | Design Report**).
- Duplicate pupil/student records are no longer displayed in reports (via **Reports | Design Report**).

## School Census Autumn Return 2011

The dates for the School Census Autumn Return 2011 are:

- **Census Day** – 06/10/2011
- **Age at Date** – 31/08/2011 (2010 for Attendance and 2011 for all other items)



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### **IMPORTANT NOTE for Secondary Schools with a Sixth Form:**

*We recommend that all schools with a sixth form run the Duplicate QAN Report (via **Tools | Statutory Return Tools | Duplicate QAN Report**) before finalising their Autumn Return. This report identifies each course that has the same QAN plus Discount Code as another course. Such duplicate use of QAN plus Discount Code is justified under certain conditions, e.g. a normal course and a retake, but is never justified for courses that have any members in common at any point, e.g. AS and A2 Chemistry.*

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### Dates

- Attendance:
  - from 1 term ago
  - Special schools - Start of the 2010 Autumn term to 27/05/2011.
- Exclusions from 2 terms ago.
- Learning Aims from after Summer Census – Secondary schools.
- **Calculate All Details** button has been moved to the **Census Details** panel.

### Pupil Level Information

- Items not collected at all for 2011:
  - Source of Ethnicity
  - Source of Service Children
  - In Care information, except for those with exclusions
  - Parental Contacts (ContactPoint closed).
- Items not collected for Autumn 2011:
  - Pupil Ethnicity Code
  - Pupil Addresses
  - Pupil Disability.

## Update Hours at Setting

- Defaults to blank, as this is for a new academic year.
- A warning is displayed if zero hours is saved for a pupil/student. The maximum value on entry is 99.5.

## Update Learning Aims Panel

- Very similar to the approach taken for Summer 2011:
  - All information in the table is calculated from a combination of what is currently stored in Course Manager and what was provided in Summer Census.
  - Some of the information in the table can be edited and whatever is eventually saved in the table becomes the output for the Census Return.
  - Colours are used to indicate the position for each cell.
- Planned End Date
  - The DfE/YPLA uses this to indicate the number of years for the course and for matching purposes, so this defaults to the date in the Summer Census rather than any change of date in Course Manager.
- Submitted in Error
  - This flag is given a default value based on a comparison of what was submitted for the Summer Census and the values calculated for the Autumn Census.
- Learning Aims comparison Report
  - Compares Learning Aims with those submitted in the previous Summer – displays **Y** for submitted in error.
  - Course Manager comparison Report.
  - Compares Learning Aims collected with those in Course Manager

## Duplicate QAN Report

- **Tools | Statutory Returns | Duplicate QAN Report.**

## Remove Unused QANs

- **Tools | Academic Management | Course Manager | Maintain Course Classification** – Remove Unused QANs.

## Reconcile Course & Exams

- Reconcile Post 16 Course & Exam Results.
- Reconcile Post 16 Course & Exam Entries.

## Authorisation

- Check for missing attendance marks.
- Positive indication that the head teacher has agreed to the authorisation.
- Automatic creation of the Summary Report and Authorisation Report at the point of authorisation.

## School Workforce Census Return 2011

The date for the School Workforce Census Return 2011 is:

- **Census Day** – 03/11/2011

## New Features

This release includes the following new features:

- **Authorising the Return**

### Routines | Statutory Returns | School Workforce Census

The **Head teacher authorisation** dialog has been introduced to enable the user to confirm that the Head Teacher has checked the Summary and Detail reports and that the return file is ready for upload to the LA/DfE.

When the confirmation check box is selected, the **Continue** button becomes active, enabling the authorisation process to be completed.

On completion of the authorisation process, the Summary report is generated and displayed in your web browser. From here it can be saved for future reference or printed and sent to your LA/DfE, if requested.

- **Definition of Staff Categories**

Staff categories are now referred to as being 'contracted', where the staff have contracts. Agency teachers have service agreements.

The staff categories are:

- Contracted teachers
- Contracted teaching assistants
- Other contracted support staff
- Agency teachers.

- **Data Collected for Staff Categories**

- Qualifications for all staff categories.
- Payment contract details (current on census day and in regular service) are now collected for contracted staff categories.

- **Data Collection Dates**

Contracts are now collected for the previous academic year and up to the census date. Previously, contracts were collected for the previous academic year only.

Absences are collected for teachers and teaching assistants with contracts for the previous academic year only.

- **Definition of Total Pay**

Allowances are no longer included in the calculation of Total Pay.

- **Definition of Allowances**

Allowances are included from 05/11/2010 to 31/11/2011 (started, ended and current).

- **New Qualification Subject Codes**

There are 12 new qualification subject codes.

- **New Origin Code**

There is a new origin code – NOTAPP='Not Applicable - change of contract'

- **New QTS Route Code**

There is a new QTS route code – 'OTTN - Overseas Trained Teacher, not yet on Programme'.

- **New Pre-defined Report**

There is a new SWC Report to list the staff who are included in the SWC return.

- **New Academies**

Academies will be asked to enter the date that the academy opened. If the academy has opened since the last SWC return, absences and contracts that apply to the period before the academy opened will be removed from the SWC return file.

For more information, please refer to the *Producing the School Workforce Census Return 2011* handbook.

## SIMS Learning Gateway

For information on the new version of SIMS Learning Gateway, please refer to the release notes that will be made available from our SOLUS website (<http://www.capita-cs.co.uk/solus>) on product release.

## SOLUS<sup>3</sup> Phase 4

SOLUS 3.4 Release 1 (version number 3.4.24) is now available on general release to all SIMS software customers.

The latest release includes the functionality required to upgrade FMS, SIMS and Discover installations. Full details on its new features and how to upgrade to it are contained in the SOLUS 3.4 release note, available from SupportNet (<http://support.capitaes.co.uk>), Resource Number 17976.

When new versions are released, a posting will be made to SupportNet and a release note will be provided, detailing the functional enhancements made.

## STAR

### New Features

This release includes the following new features:

- **Associating a Person with a School Tier**

A teacher or a member of non-teaching staff can be linked to one or more school tiers via the Pastoral Structure. Once linked, they become known as an associate of a tier and this enables members of staff associated with a particular tier to be retrieved in person browsers throughout SIMS.

For more information, please refer to the *Defining the Pastoral Structure* chapter in the *Setting Up and Administering SIMS* handbook.

The SIMS report dictionary has also been updated to enable reporting on members of staff associated with a particular tier.

### Enhancements

This release includes an enhancement in the following area:

A range of telephone numbers and email addresses can be recorded for a pupil/student and their contacts. A **Main** number can be set for each device type (e.g. **Home**, **Work** and **Mobile**). Setting a number as **Main** for a device type indicates the most likely number (of that device type) on which they can be contacted. This functionality is also available for email addresses.

However, this release enables one **Primary** number to be recorded for a pupil/student and this is the number that should be used in the first instance in any communication with their parent/guardians, e.g. if their child is taken ill at school. This functionality is also available for email addresses.

For more information, please refer to the *Maintaining Pupil/Student Information* chapter in the *Managing Pupil/Students in SIMS* handbook.

## Fixes

This release includes a fix in the following area:

- When a Preferred Forename is recorded in Personnel, their name (when displayed on the SIMS **Home Page**) displays the correct forename initial (via **Focus | Home Page**).
- The length of the **Comments** field in the database now correlates with that in the user interface, enabling a report card to be opened (via **Focus | Behaviour Management | Report Card**).
- Obsolete ethnic categories are no longer used to filter pupil/students in user defined groups, Profiles user defined groups or Assessment defined groups (via **Focus | Groups**).
- The School Diary view has been expanded, enabling a whole week to be viewed on screen (via **Focus | School | School Diary**).
- When assigning a pupil/student to a detention to which they have already been assigned, the original behaviour type is no longer overwritten (via **Focus | Behaviour Management | Maintain Behaviour Incidents**).
- Linked agent address details are now visible only to users with the appropriate permissions (via **Focus | Pupil (or Student) | Pupil (or Student) Details**).
- Only the correct linked adults and agencies are now displayed in a pupil/student SEN record (via **Focus | Pupil (or Student) | Special Educational Needs**).
- The Curriculum Manager now has the correct permissions to change the Academic Year (via **Tools | Academic Management | Set Academic Year**).

## System Manager 6

### Fixes

This release includes a fix in the following area:

- The Curriculum Manager now has the correct permissions to change the Academic Year (via **Tools | Academic Management | Set Academic Year**).
- Linked agent address details are now visible only to users with the appropriate permissions (via **Focus | Pupil (or Student) | Pupil (or Student) Details**).

## System Manager 7

This is a replacement for System Manager 6 and its features include:

- Adding new users to SIMS (either new or existing people) and maintenance of existing users.
- Allocating users and permissions to groups.
- Managing group permissions.
- Ability to clone groups.
- Import and export of groups.
- On-screen viewing and reporting of audit logs (user access to SIMS).
- Reporting on the permissions assigned to users.
- Reporting of SIMS system information.

## Updated Handbooks Available with this Release

The following handbooks have been produced for this release. Please refer to the *What's New in This Release* section in each handbook for details of the specific changes.

- Accounts Payable in FMS
- Cover 7 in SIMS
- Managing Courses in SIMS
- Managing Pupil/Students in SIMS
- Managing Staff in SIMS
- Nova-T6
- Partnership Xchange for School Administrators
- Partnership Xchange for System Administrators
- Primary School SIMS Yearbook for the Academic Year 2011/2012
- Producing Attendance Reports in SIMS
- Producing Lesson Monitor Reports in SIMS
- Producing Student List, Student Analysis and Timetable Reports in SIMS
- Producing the Post 16 Autumn 2011 Return (Welsh Secondary Schools)
- Producing the School Census Autumn 2011 Return (English Nursery Schools)
- Producing the School Census Autumn 2011 Return (English Primary/Middle deemed Primary Schools)
- Producing the School Census Autumn 2011 Return (English Secondary/Middle deemed Secondary Schools)
- Producing the School Census Autumn 2011 Return (English Special Schools)

- Producing the School Workforce Census 2011 Return
- Secondary School SIMS Yearbook for the Academic Year 2011/2012
- Setting Up and Administering SIMS
- Setting Up and Maintaining Dinner Money in SIMS
- SIMS Examinations Organiser
- SIMS InTouch
- SIMS Learning Gateway for Parents & Carers
- SIMS Learning Gateway for School Site Administrators
- SIMS Learning Gateway for Students
- SIMS Learning Gateway for System Administrators
- SIMS Learning Gateway for Teachers
- SIMS Learning Gateway Web Parts
- SIMS Pre-Defined Reports Catalogue
- SIMS System Manager
- Special Educational Needs in SIMS