CAPITA

SIMS 2011 Autumn Release

SIMS 7.142

Contents

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.

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Release Note Version	Change Description	Date
1.1	Initial release	14/11/2011
1.2	Addition of an Enhancement for STAR, relating to Reasons For Leaving	23/11/2011

Welcome to the SIMS 2011 Autumn Release

The SIMS 2011 Summer Release (7.142) includes the following new functionality:

- **Admissions**

  Includes ATF version 8.1 and the functionality to mark an enquiry as **Inactive** and to record the reason why an enquiry is not being progressed further. You can also record whether an applicant is required to apply to the UK Border Agency for a CAS number. It is now possible to search for an application by House.

  For more information, please see *Admissions* on page *12*.

- **Cover**

  You can now choose a Tier to filter their members who are associated with a particular Tier. It is now possible to enter in a recurring (or repeating) absence in the Cover Diary. All Cover reports can now be exported to Microsoft Excel.

  For more information, please see *Cover* on page *15* and *Personnel* on page *27*.

- **Dinner Money**

  New features include multiple-level debt letters and meal totals on the Dinner Register. Improvements have been made to the Manual Entry Dinner Register report.

  For more information, please see *Dinner Money* on page *17*.

- **FMS 6.142**

  Enhancements have been made so that only linked cost centres are displayed when selecting cost centres in the **Ledger Browse** and only linked ledger codes are displayed when selecting ledger codes in the **Cost Centre Browse**.

  Enhancements have been made to the recording of deliveries.

  A new report has been included that displays for the selected period current budget, current actual, variance, previous year actual for the equivalent period and variance between the current period and the equivalent period in the previous year.

  For a full list of new features and enhancements, please see *FMS* on page *18.*

- **InTouch**

The following new features have been added to minimise the effort required by the school to communicate to the school community and to reduce the cost of communication:

- An option to send students and staff their timetables via email to save on printing and stationary costs.
- Improved SMS matching to make sure every message received can be identified to a contact in the database.
- The ability to send a message relating to a detention to improve efficiency and reduce cost.
- You can now attach a reason for absence (received for unexplained absences) against a mark.
- Some error messages have been simplified in order to improve the understanding of the issue.
- An 'outbox' for queuing has been added if the school network or internet connection is down.

For more information, please see *InTouch* on page *23*.

- **Lesson Monitor**

A new symbol on the register has been introduced if a student is withdrawn from part of a multi-period session in the Academic Curriculum by Student area.

For more information, please see *Lesson Monitor* on page *24*.

- **Nova T6**

Includes a new feature (Combing Chart) enabling you to calculate whether a proposed structure will fit into the number of periods available. Individual or groups of subjects can be selected to comb. The Combing Chart is available from the **Tools** menu.

It is now possible to create data files for export to third party software suppliers. This functionality is available from the **Data** menu.

For more information, please see *Nova T6* on page *26*.

- **STAR**

Enhancements have been made to the Pupil Teacher View, including copying address information and sending/copying e-mails.

Editable refresh rates have been added to **Behaviour**, **Achievement** and **My Classes Summary** panels.

You can now scroll the Timeline for ten days backwards and forwards to enable you to view other classes on the Home Page.

The **Select Member** browse for User Defined Groups has been modified to enable efficient selection and display of members. The membership display now includes the member's registration group.

You can now choose to display all bands including sub bands and multiple years via **Reports | Timetables | Year/Band Timetable**.

For more information, please see *STAR* on page *30*.

Statutory Returns Included with this Release

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

- **ASCIS 2012 Return (Independent Schools only)**

  Includes the functionality required to complete the ASCIS 2012.

  For more information, please see *ASCIS 2012 Return* on page 13.

- **CESEW 2012 Return**

  Includes the functionality required to complete the annual CESEW 2012 Return.

  For more information, please see *CESEW 2012 Return* on page *14*.

- **ISC 2012 Return (Independent Schools only)**

  Includes the functionality required to complete the annual ISC 2012 Return.

  For more information, please see *ISC 2012 Return* on page *24*.

- **PLASC Return 2012**

  Includes the functionality required to complete the annual PLASC Return 2012.

  For more information, please see *PLASC 2012 Return* on page *27*.

- **PRU Return 2012**

  Includes the functionality required to complete the annual PRU Return 2012.

  For more information, please see *Pupil Referral Unit (PRU) Census 2012 Return* on page *28*.

- **School Census Spring Return 2012**

  Includes the functionality to produce the School Census Spring Return 2012.

  For more information, please see *School Census Spring 2012* on page *29*.

Important Information Regarding Microsoft .NET Framework 4 Extended

IMPORTANT NOTE: *Microsoft .NET Framework 4.0 Extended is a pre-requisite for SIMS for the SIMS 2011 Autumn Release. Computers (workstations or Servers) without this software cannot run SIMS.*

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. Pease contact a system administrator or your local support service.

Important Information – Please Read <u>before</u> Upgrading

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

The SIMS 2011 Autumn Release is compatible with Microsoft SQL Server 2008 editions. Microsoft SQL Server 2005/SQL Express 2005 are no longer supported. You <u>must</u> 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 Autumn Release.

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

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:

1. 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.
2. 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.
3. 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 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).

Important Note for Users Intending to use Scanned Documents in FMS

If you are using Scanned Documents in FMS, have already applied Patch **16361** and you are planning to move your FMS database to a new server (i.e. in the case of a server rebuild), you <u>must</u> carry out the steps in the prescribed order:

1. Take a backup of FMS.

2. Install a new SQL Server using the FMS installation media.
3. Apply Patch **16361** to the new/blank FMS database and SQL Server.
4. Restore the FMS backup taken in Step 1.

   If you restore the FMS backup to a SQL server that has not had Patch **16361** applied, the dbAttach utility will display a message informing you that the FILESTREAM functionality is not enabled.

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 7.142 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 Tier 4 Applicants by Intake Group, and is accessed via **Reports | Run Report | Focus | Application**. This report shows all Tier 4 applicants.

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

B2B – Compatibility Between One and SIMS

As part of the SIMS 2011 Autumn 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 Summer Release to present.

		One Release Version		
		3.43 (March 2011)	3.44 (June 2011)	3.45 (October 2011)
SIMS Release Version	7.140 (Summer 2011)	✓	✓	x
	7.142 (Autumn 2011)	x	✓	✓

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	7.142	6.142	6.142	6.142
Minimum version	7.140	6.140	6.140	6.140

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 Autumn Release

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

- SIMS 2011 Autumn Release (SIMS 7.142)
- SIMS 2011 Summer Release (SIMS 7.140)

IMPORTANT NOTE: *If you install the SIMS 2011 Autumn Release (SIMS 7.142) 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 Autumn Release

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

IMPORTANT NOTE: *If you install the SIMS 2011 Autumn Release (SIMS 7.142) and continue to run an older release of the PX Agent, this is not guaranteed to work and is therefore not supported.*

Acrobat Reader 9 and the SIMS 2011 Autumn Release

Adobe® Reader version 9 or above must be installed before you can read any of the user documentation.

NOTE: If you already have Adobe Reader version 9 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:

- Academic Management
- Admissions
- Analysis
- ASCIS 2012 Return
- Assessment
- CESEW 2012 Return
- Course Manager
- Cover
- CTF
- Dinner Money
- Examinations Organiser
- Fees
- FMS 6.142
- ICS 2012 Return
- InTouch
- Lesson Monitor
- Nova T6
- Personnel
- PLASC 2012 Return
- Profiles
- PRU 2012 Return
- Reporting
- School Census Spring 2012 Return
- SIMS Learning Gateway
- STAR
- System Manager

Academic Management

Fixes

This release includes fixes in the following areas:

- When printed, the Staff Groups report (accessed via the **Staff Groups** item in the **Links** menu) now displays the correct information (via **Focus | Person | Staff | Staff Groups**).
- An error no longer occurs when you attempt to move from an academic year in one timetable model to a different academic year in a different timetable model (via **Focus | School | Academic Structure | Curriculum Assignment by Student**).
- An error no longer occurs when attempting to save whole curriculum memberships (via **Focus | School | Academic Structure | Whole Curriculum Assignment**).
- Where there are two timetable models in a single academic year, and the same class is scheduled at the same period in both models, it is now possible to remove student membership from this class (via **Focus | School | Academic Structure | Curriculum Assignment by Student**).
- Before attempting to delete an academic year from the School Diary, SIMS now removes any personal tasks that have been defined in that year (via **Focus | School | School Diary**).
- An error that was being displayed in error (informing you that another user has changed the data) is no longer displayed when editing student memberships (via **Focus | School | Academic Structure | Curriculum Assignment by Student**).

Admissions

New Features

This release includes the following new features:

- **Recording Tier 4 Applications**

  Tier 4 functionality, which handles applications from foreign pupil/students, can now be recorded. A **CAS Reference** (Confirmation of Acceptance for Studies) can be recorded via the **Application** page (**Focus | Admission | Application**).

  Only schools that accept foreign nationals (requiring a VISA) as pupil/students need to manage the application of these pupil/students. This functionality assists in tracking this type of application. Prior to using this functionality, you must enable it via the **Setup Details** page.

  For more information, please refer to the appropriate Admissions handbook.

- **Adding a Prospective Pupil to a Visit**

  When adding prospective pupil/applicants to a visit record via **Focus | Admission | Interviews & Visits**, it is now possible to filter by **Year of Entry** and **Year Group**.

  For more information, please refer to the *Managing Internal Interviews and Visits* in the *SIMS Admissions Code of Practice Own Admissions Authority Full Licence* handbook.

- **Adding an Applicant to an Existing Visit**

  Applicants can now be associated with an existing visit via the **Application** page.

  For more information, please refer to the *Managing Applications in you School* chapter in the *Setting Up and Administering SIMS* handbook.

- **Searching for an Application by House**

  It is now possible to search for an application by house (via **Focus | Admission | Application**).

- **ATF 8.1**

  The ATF version is now 8.1.

ASCIS 2012 Return

Includes the functionality to complete the ASCIS 2012 Return:

- **Census Day** – 19/01/2012
- **Age at Date** – 31/08/2011

Assessment

The following enhancements have been made to improve the flow of various areas within Assessment:

- **Focus | Assessment | Marksheet Entry**

  When a marksheet was opened, the cursor was previously focussed on the **Result Date** field. The cursor is now focused within the **Basic Details** panel.

  For more information, please refer to the *Entering and Reviewing Data using Marksheets* chapter in the *Managing Assessment* handbook.

- **Focus | Assessment | Template**

  It is now possible to globally replace result sets that are attached to aspects in a template instead of having to change the result sets individually.

  For more information, please refer to the *Creating and Maintaining Templates* chapter in the *Managing Assessment* handbook.

- You can now copy a line of the formula to the next 'Else' line when creating a Nested If Then Else formula.

Fixes

This release includes fixes in the following areas:

- An error no longer occurs when exporting a CTF containing Assessment data (via **Routines | Data Out | CTF | Export CTF**).
- A locked result set is now correctly indicated as such when a new marksheet template is created (via **Focus | Assessment | Template**).
- Duplicate pupil/students are no longer created during the InCAS student export process (via **Routines | Data Out | InCAS**).
- With a tracking grid open, the **Hide Empty Leading/Trailing Columns** option (from the **Actions** drop-down menu) is now spelt correctly (via **Focus | Assessment | Tracking Grids**).
- When importing grade sets, all of the information from the import file is now imported correctly (via **Routines | Data In | Assessment | Import**).
- The JC 8 Forecast grade set now shows the correct value (230) for Grade B (via **Focus | Assessment | Grade Set**).
- To resolve an issue when opening the Individual Reports menu route, SIMS now checks whether or not Microsoft® Word and Microsoft® Excel are installed on the workstation (via **Focus | Assessment | Individual Reports**).

CESEW 2012 Return

The dates for the CESEW 2012 Return are:

- **Census Day for Wales** – 17/01/2012
- **Census Day for England** – 19/01/2012
- **Age at Date** – 31/08/2011

Course Manager

Fixes

This release includes a fix in the following area:

- If the **Auto update Class Supervisors from chosen Course Supervisors** check box is selected then you click the **OK** button, this setting is now saved correctly (via **Tools | Setups | Curriculum Setup | Course Manager Setup**).

Cover

New Features

This release includes the following new features:

- **Improvements to the Staff Absence Process**

  Tools | Cover | Reasons for Absence

  Further improvements have been made to the process for recording absences in Cover. It is now possible to create a reoccurring or regular absence instead of having to create a separate record each time a member of staff is absent, e.g. a staff member has a regular hospital appointment every Monday between 3 and 4pm and cover is required for their lessons during this time period.

  Once the regular absence has been created, it is possible to assign cover as well as to delete a cover arrangement for this absence and to make bulk changes to the regular absences for the future.

  As a result of this, improvements have also been made in Personnel to consolidate the absence process between the two areas.

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

- **Extension of School Tier Filter Functionality from SIMS**

  The tier filter functionality has been extended into the Cover area to enable you to filter out staff members who are linked to a particular school tier.

  This functionality is available when:

  - Filtering staff members by school tier when recording school absences in the Cover Diary.
  - Filtering staff members when viewing staff absences in the Cover Diary.
  - Filtering by school tier when viewing all staff members in the Cover Diary.

  Benefits of this functionality include:

  - Staff members are only suggested for cover if they are associated with the applicable school tier.
  - The **Auto Cover** button in the Cover Diary also considers a staff members' association with a particular tier before suggesting them for cover.

- **Exporting of All Cover Reports to Excel Format**

  It is now possible to export all Cover reports to Excel format. Previously, the **Classroom Staff Absence Report** (Absence Detail report) and the **Cover Report** (Cover Report Detail) could not be exported to Excel.

Additionally, one of the **Print Options** in the **Print Cover Arrangements** dialog has been amended to show **Include Reason for Absence/Closure**.

Fixes

This release includes fixes in the following areas:

- If you are using a brand new database supplied by SIMS, the working pattern now correctly runs from Monday to Friday rather than Tuesday to Saturday (via **Focus | Person | Manage Classroom Staff**).
- Any person who has been removed from the cover rota (i.e. those without a working pattern or have been marked as not providing cover) are now no longer displayed on the Staff Timetable(s) report (via **Reports | Timetables | Staff Timetable(s)**).
- European characters (e.g. umlauts) are now displayed correctly when printing the Cover Diary (via **Focus | School | Arrange Cover**).
- The preferred forename, or initial, is now used in the **Available Staff** list when arranging cover (via **Focus | School | Arrange Cover**).
- The correct period times are now displayed on the Cover Diary when adding an absence and selecting the **By Period** option (via **Focus | School | Arrange Cover**).
- When adding a contact to Manage Classroom Staff, they are also now displayed in the **Agents** folder (under **Source Population**) in System Manager.
- When changing the member of staff who will provide cover for a class, this change is now reflected correctly in the Cover Diary (via **Focus | School | Academic Structure | Edit Lesson Staff and Rooms**).
- The correct figures are now displayed in the Activities requiring attention column of the **Cover Diary** browser (via **Focus | School | Arrange Cover**).

Database Diagnostics

Fixes

This release includes a fix in the following area:

- The **Print** button is now enabled in all instances when running Database Diagnostics (via **Tools | System Diagnostics | Database Diagnostics**).

Dinner Money

New Features

This release includes the following new features:

- **Debtor Letters**

  Reports | Dinner Money | Letters | Debtor

  It is now possible to create multiple debt letters for different severities of debt.

  For more information, please refer to the *Producing Dinner Money Letters* chapter in the *Administering Dinner Money* handbook.

- **Manual Entry Dinner Register Report**

  Reports | Dinner Money | Listings | Manual Entry Dinner Register

  You can now select to **Show Current Balances** on the Manual Entry Dinner Register report.

  The report also includes a table at the bottom of every class list detailing the total number of meals recorded each day for each meal type.

  For more information, please refer to the *Running Dinner Money Reports* chapter in the *Administering Dinner Money* handbook.

- **Meal Totals**

  Focus | Attendance | Take Register (or **Focus | Dinner Money | Record Pupil Meals**)

  It is now possible to view Meal Totals (**Count**) via the **Codes** dialog in Take Register.

Examinations Organiser

Fixes

This release includes fixes in the following areas:

- The correct membership dates are now displayed on the Group Performance Analysis report (via **Reports | Results | Group Performance Analysis**).
- There has been an enhancement to the performance of SIMS when saving information in Seating Organiser (via **Focus | Seating Organiser**).
- The correct grades are now displayed on the Element/Component Results report (via **Reports | Results | Element/Component Results**).
- External candidate results can now be exported correctly (via **Reports | Results | Export Results**).

- BTEC points have been corrected: D* is now 135 points, D is now 112.5, M is now 97.5 and P is now 82.5.
- For schools in Northern Ireland only, the Subject/Grade Analysis report now reports on Guest candidates (via **Reports | Results | Subject/Grade Analysis**).

Fees

Fixes

This release includes fixes in the following areas:

- The performance of the Transfer Bills process has been improved (via **Focus | Fees Billing | Periodic | Transfer Bills**).
- The performance of the Transaction Batch Report has been improved (via **Focus | Fees Billing | Transactions | Transaction Batch Report**).
- The Boarder status now displays correctly when applying charges for accepted pre-admission pupils (via **Focus | Fees Billing | Charging | Apply Charges**).

FMS

New Features

This release includes the following new features:

- **Tools | Manage Users**

  An additional panel has been incorporated into the **Access Level** dialog available via **Tools | Manage Users**. The **Cost Centre Access** panel enables you to restrict a user's access to particular cost centres or a collection of cost centres and to specify a monetary value in the **Order Threshold** field.

  The **Order Threshold** ensures that the user is unable to raise orders that exceed this figure, against the cost centres or collection of cost centres to which they have been granted access.

  For more information, please refer to the *Getting Started in FMS* handbook.

- **Tools | Establishment Details**

  A new tab has been provided to enable you to enter the necessary specifications so that you can attach Scanned Documents to invoices and credit notes in Accounts Payable.

  For more information, please refer to the *Getting Started in FMS* handbook.

Historical Analysis Reports

A new menu route has been provided to enable access to Historical Analysis Report outputs via **Reports | General Ledger | Analysis | Historical Expense Analysis**. You can select to print either summary or transactional data.

For more information, please refer to the *General Ledger FMS* handbook.

Ability to Attach a Scanned Document to an Invoice or Credit Note

You can now attach a scanned copy of an original purchase order, supplier's invoice/credit note or any other pertinent documents, to an invoice or credit note. This helps you to ensure that orders and invoice/credit notes are correctly associated.

For more information, please refer to the *Accounts Payable in SIMS* handbook.

Creation of Restricted Users

Enhancements have been made to the **Manage Users** functionality to enable you to create Restricted Users within FMS. Restricted Users can be assigned access to specific cost centres or a collection of cost centres and a spending threshold can be set on individual cost centres to further restrict their spending capabilities within FMS.

As a result of these restrictions, Restricted Users can only place orders, net of VAT, that do not exceed their spending threshold from within the cost centres or cost centre collection to which they have been granted access rights. Restricted Users have no access to other cost centres and they are also prevented from viewing an order if a least one line on the order has been charged to a cost centre which they do not have permission to view. These orders will not appear for selection by the restricted user in the **Purchase Order** browse.

Users with restricted access can only access the following menu routes and carry out the following activities:

- **Focus | Accounts Payable | Purchase Orders**

  Creating Purchase Orders up to the value of their defined Order Threshold but they cannot authorise the orders.

  To enable restricted users to raise orders, the **Order Book Open – Restricted Users** check box must have been selected via **Tools | Define Financial Years | Define/Edit Years**.

- **Focus | Accounts Payable | Deliveries**

  Entering and saving Delivery Notes.

- **Focus | Accounts Payable | Invoices/Credit Notes**

  Authorising Invoices, Credit Notes, Non-Order Invoices and Sundry Invoices but not creating new ones.

- **Focus | General Ledger | Chart of Accounts Review**

  Reviewing the details of the cost centres or collection of cost centres that they have been assigned access to.

- **Reports | General Ledger | Transactions | Detailed Transactions | Cost Centre Transactions and Ledger Code Transactions**

  Generating Reports for the cost centres or collection of cost centres that they have been assigned access to.

Enhancements to the Cumulative Expense Analysis Report

The following improvements have been made to the existing Cumulative Expense Analysis Report:

- If you do not want to report on balance sheet cost centres or ledger codes with a zero value, select the **Exclude Balance Sheet** and **Exclude Ledger codes with Zero Value** check boxes.
- The report output is now divided into two distinct sections that display sub totals and grand totals for the following:
  - Ledger Codes Linked to Cost Centres
  - Balance Sheet Ledger Codes.
- Totals for commitment have been reduced to two decimal places, in line with the Chart of Accounts Review reports.

For more information, please refer to the *General Ledger FMS* handbook.

Additional Enhancements to the Chart of Accounts Review Screen

The **Chart of Accounts Review** screen now has an additional check box to enable you to filter out the Balance Sheet accounts from the Chart of Accounts Review Ledger browse. This allows you to view and print totals that reflect your net Income and Expenditure figures. This check box is unchecked by default and the setting remains active whilst you are in the Chart of Accounts Review area. Once you close the Chart of Accounts Review screen, the setting reverts to all ledger codes.

Select **Focus | General Ledger | Chart of Accounts Review** to display the **Chart of Accounts Review** screen and select the **Exclude Balance Sheet Accounts** check box.

- When printing from the Ledger Browse screen, the output only includes ledger code totals for EX, ES and IN ledger code types.
- Only cost centres that are linked to selected ledger codes are available for selection within the Cost Centre browse. This ensures that the totals displayed reflect the selected cost centre/ledger code combinations.
- Likewise, only ledger codes that are linked to selected cost centres are available for selection within the Ledger Code browse. This ensures that the totals displayed reflect the selected cost centre/ledger code combinations.

- When searching for a ledger code in the Ledger Code browse, the ledger code that was selected most recently remains highlighted instead of the highlight returning to the top of the list of ledger codes in the browse. This continues during your current session in the Ledger Code browse.
- When searching for a cost centre in the Cost Centre browse, the cost centre that was selected most recently remains highlighted instead of the highlight returning to the top of the list in the Cost Centre browse. This continues during your current session in the Cost Centre browse.
- Two additional columns have been incorporated into the Chart of Accounts Review report, **Prev.Year Actual** and **Variance (Actuals)**. These columns provide a comparison by period between this year's actuals and those from the previous year up to the date of printing.

  For more information, please refer to the *General Ledger FMS* handbook.

Improvements to the Recording of Deliveries

Additional functionality has been provided primarily to enable schools in Northern Ireland to improve the recording of deliveries. However, all schools can take advantage of this functionality. If the **Record Deliveries** check box is selected for the current financial year within the **Define Financial Years** menu route, you can specify additional parameters for the recording of deliveries through the **Tools | Accounts Payable Parameters | Enhanced Deliveries** tab.

- Two new check boxes have been provided so that it is possible to specify that a **Delivery Note Number is Mandatory** and must be entered when a delivery is recorded. It is also possible to select the **Prevent Over Delivery** check box.

  These check boxes are unchecked by default. When the check boxes are selected, an entry is written to the audit trail and the **Delivery Note Number** field on the **Deliveries** page is mandatory until such time as the check box is deselected.

  If the **Prevent Over Delivery** check box is selected, when adding or editing a delivery note, the total number of delivered items is calculated and the **Quantity Delivered** field turns red if the number of items entered exceeds the number of items in the original purchase order line.
- You can also **Hide/Reveal** purchase order lines that have been fully delivered to enable you to locate the required order line more easily when recording a new delivery note.
- It is possible to change the presentation display of purchase orders in the **Delivery Note** page so that you can search for the required purchase order by the date of raising or by the purchase order number.

Enhancements to the BACS Run Report

Additional data fields have been included in this report to improve the security of the report output.

- The **Creation Date** of the BACS run is displayed together with the **Processing Date**.
- The bank **Sort Code** and **Account Number** are displayed for each payee. If this information has been amended since it was first recorded, the date that the information was **Updated** and the user id of the **User** who made the amendments, are also displayed.
- Two lines are available for the use of authorised signatories.

For more information, please refer to the *Accounts Payable in SIMS* handbook.

Placing Purchase Orders On Hold

It is possible to place a purchase order 'On Hold', in a similar way to invoices and credit notes. Purchase orders with the status of 'On Hold' cannot be authorised until the status is changed.

Enhancements to the Audit Trail

Entries are now written to the Audit Trail when the following transactions are created in FMS:

Central Authorisation File

The location of the central authorisation file and any transactions contained within the file.

Purchase Orders

- Additional information is recorded for unauthorised purchase orders including a record of any deleted unauthorised purchase orders.
- You can trace the progress of an authorised purchase order from its initial status of unauthorised purchase order.
- Additional information is recorded for printed purchase orders.

Additional entries are written to the Audit Trail for transactions associated with the following new functionality:

Restricted User Records

- The creation of a restricted user, the cost centre(s) or collection of cost centres that they have been assigned access to and the values of the respective Order Threshold(s).

Scanned Image Entries

- An entry is recorded when a scanned image is added, edited or deleted from an invoice or credit note.

  For more information, please refer to the *Accounts Payable in SIMS* handbook.

Fixes

This release includes fixes in the following areas:

- The Central Authorisation file cannot be created until confirmation that the Authorisation Slip has been printed successfully.
- It is now possible to log in to FMS even when a printer has not been installed and associated with FMS.
- Contracts for a member of staff with more than one contract can now be modified via **Budget Planning | Salary Calculation**.
- It is now possible to simultaneously post Fees transactions into FMS.
- It is now possible to post Fees Bills where the Fees and Extras elements of the Bills are to be accounted for in different financial years.

InTouch

New Features

This release includes the following new features:

- **Sending a Pupil/Student Timetable Message**

  Individual pupil/student timetables for the timetable cycle can now be sent electronically to a range of recipients, including the pupil/student and their parent/guardians.

- **Sending a Staff Timetable Message**

  Individual staff timetables can now be sent electronically to a member of staff.

- **Sending a Pupil/Student Detention Message**

  If a pupil/student has been given a detention, a message can be sent to their parent/guardians to inform them.

- **Applying Incoming Message Text to Event Comments, Take Register and Edit Marks**

  When a message is received from an external source (via SMS or email) in response to an Unexplained Absence message sent from your school, the content of the message text can be applied to the corresponding event. The content can also be made visible in Take Register and Edit Marks.

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

- **Matching an Incoming SMS Message with the Original Message**

  It is now possible to attempt to match a message received from an external source (via SMS) with a message originally sent from SIMS, e.g. in response to an Unauthorised Absence message. To use this functionality, it must first be enabled.

  For more information, please refer to the *Default Communications Method and SMS Matching* chapter in the *Managing Communications Using InTouch* handbook.

- **Message Queuing**

  Messages that cannot be sent immediately, perhaps because of a failure in the messaging service, can now be queued and re-sent automatically when the issue is resolved.

  For more information, please refer to the *Additional Information* chapter in the *Managing Communications Using InTouch* handbook.

ISC 2012 Return

Includes the functionality to complete the ISC 2012 Return:

- **Census Day** – 12/01/2012
- **Age at Date** – 31/08/2011

Lesson Monitor

New Features

This release includes the following new features:

- **Alternative Curriculum Activities**

  A code **®** is automatically displayed in the register if the withdrawal relates to a multi-period session to indicate to the member of staff taking the register that the student has been withdrawn into an Alternative Curriculum activity.

- **Overwriting N Lesson Marks with I (Illness)**

  Where the school is informed that a student will not be attending because they are unwell, the school office enters the applicable mark, i.e. **I** (Illness), via **Focus | Lesson Monitor | Edit Marks**. It is possible that a comment might also be entered against one or more of the affected periods.

  When the register is marked, the registration teacher/tutor enters **N** in the register because of the student's unexplained absence.

A new piece of functionality ensures that if Edit Marks data is saved before the register, the reason for absence is recorded, i.e. when the register is saved, the **N** mark is overwritten with the mark entered by the school office. Comments entered by the school office are also displayed.

For more information, please refer to the *Taking the Register* chapter in the *Monitoring Session and Lesson Registration* handbook.

- **Allowing Lessons without Rooms to be Treated as a Double Period**

  Tools | Setups | Lesson Monitor Options | Lesson Monitor Setup

  This new Lesson Monitor set up option enables you to specify whether your school prefers multiple period lessons that have no rooms on the timetable to be treated as a single register. If the option is selected, the cells for each period are simultaneously editable and a mark entered for the first period is automatically copied across to the other periods.

  For more information, please refer to the *Setting up Lesson Monitor* chapter in the *Monitoring Session and Lesson Registration* handbook.

- **Transferring Future Lesson Marks when Class/Lesson Membership Changes**

  Previously, if future marks, e.g. **H** (authorised family holiday), **M** (medical appointment), etc. were recorded for a student, then a change to their future class membership or timetable occurred, the future mark was still shown against their old lesson (or deleted, if the lesson no longer existed).

  A new housekeeping routine is now performed automatically so that when SIMS is re-opened, e.g. the next day, the future mark is shown on the register against the new lesson.

- **Creation of New Timetable**

  Previously, when a new timetable was submitted that was the same as the previous one with a few exceptions, e.g. changes in period and day names and period times, SIMS updated the existing timetable cycle.

  A change has been implemented so that when a new timetable is submitted from Nova-T with an effective start date, a new timetable cycle that is scheduled to start at that date is always created.

- **Attendance Code Changes**

  Code D

  The statistical meaning of the session registration code **D** in England has been changed from **Approved Educational Activity** to **Attendance not required**.

  Each school only marks the register, present or absent, for the sessions that the student is due to attend their school. The remaining session(s), when the student is attending another school, should be recorded using code **D**.

The change to the statistical meaning ensures that when a student is marked as **D** at their home school, the mark is not included in the percentage of attendances. Only the school at which the student is actually educated is responsible for recording and reporting their session attendance to the LA.

A student's percentage attendance can be viewed via **Focus | Student | Student Teacher View**.

For more information, please refer to the *Additional Information* chapter in the *Monitoring Session and Lesson Registration* handbook.

Nova T6

New Features

This release includes the following new features:

- **Combing Chart**

  The purpose of the combing chart is to allow the timetabler to mathematically calculate whether the proposed timetable structure will fit into the number of periods available without reference, at this stage, to actual periods on the timetable. If the proposed timetable structure will not fit, there is no value in proceeding to the next stage of scheduling.

  The usual constraint is staffing, but rooms can be included too. Departmental heads will have suggested how their subjects should be setted and staffed, but the staffing and rooming combinations suggested on the different blocks may not fit into the total number of teaching periods available. The number of slots used for testing may need to be reduced if there are other restrictions to be considered e.g. part time teachers, etc. No editing is available on the combing chart itself. From information obtained by combing, the timetabler can make adjustments to the staffing on the plan.

  The Combing Chart is an analysis tool and any solutions that you reach cannot be applied elsewhere in Nova-T6 or exported to an alternative timetabling software package.

- **Export of Data to a Third Party**

  It is now possible to create data files for export to third party software suppliers.

- **The Ability to Reset the Block Screen Layout**

  Some users had reported instances of data corruption when using the **Block** screen. To overcome this issue, a new menu route has been provided via **Block | Reset Layout**. This routine resets the display of the **Block** screen to the default settings.

Fixes

This release includes a fix in the following area:

- Student band and group memberships are no longer lost after exporting the other half of dual timetables

PLASC 2012 Return

The date for the PLASC Return 2012 is:

- **Census Day** – 17/01/2012

For more information, please refer to the *Producing the PLASC 2012 Return* handbook.

Personnel

New Features

This release includes the following new feature:

- **Personnel Reports (XLS Format)**

All Personnel Reports via **Reports | Personnel** can now be saved as XLS format as well as RTF.

Fixes

This release includes fixes in the following areas:

- Contracts that have an end date that is the same as the end date specified on the report criteria are now displayed on the Terminating Contracts report output (via **Reports | Personnel | Terminating Contracts**).
- The **Total Pay** column on the Salary Information report now displays the total of all contracts and allowances for an employee (via **Reports | Personnel | Salary Information**).
- When entering a note regarding a staff absence in the **Notepad** panel of the **Add/Edit Absence for** dialog, accessed via the **Absences** panel on the **Employee Details** page, the text entered is now displayed correctly in the **Absences** panel (via **Focus | Person | Staff | Absences**).
- An error is no longer displayed when attempting to delete contracts in the **Employment Details** panel then click the **Save** button (via **Focus | Person | Staff**).
- Contact details that have been deleted from the **Next of Kin** panel are no longer displayed the next time you open their record (via **Focus | Person | Staff**).

- It is no longer possible to import a Service Term if its points range is greater than the points range currently held for the Service Term in Personnel (via **Tools | Staff | Pay Related Import**).

Profiles

Fixes

This release includes fixes in the following areas:

- To resolve an issue when opening any Profiles menu route, SIMS now checks whether or not Microsoft® Word and Microsoft® Excel are installed on the workstation (via **Focus | Assessment | Individual Reports**).
- When using List Entry, an error no longer occurs where no comments exist in a comment bank (via **Focus | Profiles | Data Entry | List Entry**).
- The key to codes on registration certificate has been corrected (via **Focus | Profiles | Session Manager**).
- Classes that display in the appropriate session in Profiles are now displayed correctly when batch printing class check sheets (via **Tools | Performance | Profiles | Batch Printing of Class Check Sheets**).

Pupil Referral Unit (PRU) Census 2012 Return

The dates for the Pupil Referral Unit Census 2012 Return are:

- **Census Day** – 19/01/2012
- **Age at Date** – 31/08/2011

Reporting

New Features

This release includes the following new features:

- **Adding a Report as a Favourite**

  A report can now be added to a list of Favourites, meaning it is available from the **Reports | Run Report | Favourites** and from the **My Favourite Reports** panel on the **SIMS Home Page**.

- **Ordering the List of Reports**

  Reports displayed under **Reports | Run Report** can now be sorted by clicking the appropriate column header, e.g. **Name**, **Owner**, **Updated**, etc.

- **Historical Sales and Allowances**

  Two new report dictionaries have been added to enable you to access historical and future scales and allowances:

  Contract Historical Scales

  Contract Historical Allowances

Fixes

This release includes fixes in the following areas:

- A range of additional fields relating to Personnel is now available for selection from the Reporting Dictionary when designing reports (via **Reports | Design Reports**).
- When running a report to RTF or Word List, which contains a range of fields from the Student Conduct Information sub-report, and **Display First Record Only** is selected, all teachers are now included on the report (via **Reports | Run Report**).
- Where a report is designed to display siblings of an applicant, all siblings are now reported correctly RTF reports (via **Reports | Run Report**).

School Census Spring 2012 Return

The dates for the School Census Spring 2012 Return are:

- **Census Day** – 19/01/2012
- **Age at Date** – 31/08/2011

Fixes

This release includes a fix in the following area:

- UNA and XML files no longer contain duplicate tags for <School Characteristics (via **Routines | Statutory Returns | School Census**).

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.

STAR

New Features

This release includes the following new features:

- **Refresh Rates for Panels on the SIMS Home Page**

  The refresh rates of some of the panels on the SIMS **Home Page** have been changed. The refresh rates of some of the panels are now editable.

- **Viewing Information for the Previous Working Day on the SIMS Home Page**

  When selecting the range of data to display on the SIMS **Home Page**, the **Yesterday** option in the **Cycle** drop-down list has been renamed to **Previous Day**.

  This change ensures that the data displayed is for the previous <u>working</u> day rather than yesterday, particularly useful if you wish to view data during the school holidays, on a Monday morning, etc. This change has been implemented on the **Attendance Summary**, **Behaviour Incident Summary**, **Achievement Summary** and **All Detention Sessions Scheduled/My Detention Sessions** panels.

- **Viewing More Days of Class Information in the My Classes Today Panel on the SIMS Home Page**

  As a Class Teacher, it is now possible to view your classes up to 10 days in the past and up to 10 days in the future using the **My Classes Today** panel on the SIMS **Home Page**.

- **Enhancements to Quick Search on the SIMS Home Page**

  It is now possible to return to the Quick Search functionality on the SIMS **Home Page** by pressing **CTRL + Q** anywhere in SIMS.

  The **Contacts** column will be hidden if you have only View permissions for contacts.

  Contacts recorded in SIMS <u>solely</u> as a next of kin will be displayed in the search results <u>only</u> if you have View permissions for next of kin.

- **Producing Class Lists and Student Lists**

  Right-clicking the required class in the **My Classes Today** panel and selecting **Class List** now displays the **Class List Report** page (the same as selecting **Reports | Student List | Class List**), showing the members of the selected class.

  Right-clicking the required class in the **My Classes Today** panel and selecting **Student List** displays the **Class** page, showing the members of the selected class.

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

- **Changes to the Pupil/Student Teacher View Page**

  A contact's primary email address (if recorded) is now displayed in the **Emergency Contacts** panel on the **Pupil** (or **Student**) **Teacher View** page. Additionally, clicking the email address in the **Emergency Contacts** panel creates an email (using your default email system), with the **To** field populated automatically.

  The pupil/student's address on the **Basic Details** panel can now be copied to the clipboard by right-clicking the address and selecting **Copy** from the pop-up menu.

  For more information, please refer to the *Using the Pupil/Student Teacher View* chapter in the *Managing Pupil/Students in SIMS* handbook.

- **Default Setting of United Kingdom when Recording Nationality Data**

  When recording **Nationality and Passport Details** in a pupil/student record, United Kingdom is highlighted and offered for selection automatically to facilitate selection.

- **Copying a Pupil/Student's Address and Telephone Number to a New Contact**

  To facilitate the recording of contact information, a pupil/student's telephone number is now copied to the first contact associated with them (if this information is recorded).

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

- **Importing CTF Files**

  The Pre- and Post-CTF Import reports now display an additional column (UPN) in each of the tables. A security message has also been added to the top of the Pre- and Post-CTF Import reports.

  Two changes have been made to the CTF Matching Scale dialog. When using the CTF Matching Scale 2 now matches on similar forename and similar surname. Matching Scale 4 now matches on the first letter of the forename and the first letter of the surname.

  The **On-Roll Pupil** column header on the **Match and Import** panel has been renamed **Admitted Pupil**.

  A new data category (**FSM History**) has been added to the **Data to be Imported** panel on the **Import CTF** page. This category includes **FSM Review Date**, **FSM Start Date** and **FSM End Date**, which will be imported if the check box is selected.

  When importing a CTF containing an open FSM eligibility record (i.e. no end date is recorded in SIMS), and the imported CTF has a period of FSM eligibility that has a later start date, the day prior to the start date in the imported CTF is used as the end date for the existing record in SIMS.

  For more information, please refer to the *Importing and Exporting CTFs* chapter in the *Managing Pupil/Students in SIMS* handbook.

- **Enhancements to the Recording of Free School Meal Information**

  The **Dietary** panel on the **Pupil** (or **Student**) **Details** page (**Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**) now displays periods of eligibility for free school meals in start date order, with the most recent displayed at the top of the table.

  It is now possible to record a period of FSM eligibility that has a start date before the pupil/student's **Date of Admission**.

- **New rule in Address Tidy and Merge**

  Rule z6 has been added to Address Tidy and Merge. From this release onwards, details of all addresses previously recorded in the Unmatchable Addresses report are retained. When rule z6 activated, the report will display unmatchable addresses that have never before been reported (via **Tools | Housekeeping | Bulk Address Tools | Unmatchable Addresses Report**).

  When rule z6 is de-activated, the report will behave as it did prior to this release, displaying <u>all</u> unmatchable addresses.

Enhancements

This release includes an enhancement in the following area:

- **Update to Reasons For Leaving (for Schools in England <u>only</u>)**

  The options available from the **Reason For Leaving** drop-down list (in the **School History** panel of the **Student Details** page) has been updated, in line with DfE guidelines.

  If a **Reason For Leaving** has been made inactive by this update, the reason is still recorded in the pupil/student record but can no longer be selected.

Fixes

This release includes fixes in the following areas:

- **Address Tidy and Merge**
- When assigning a detention to one of two behaviour incidents added on the same day, then you select the same detention for the other behaviour incident, the pupil is now recognised as already being assigned to the detention (via **Focus | Behaviour Management | Student Behaviour**).
- When adding a behaviour incident via Take Register, the **Detention** is no longer set to **No** if a detention location is selected and saved before the behaviour incident is saved (via **Focus | Behaviour Management | Maintain Behaviour Incidents**).

- When adding a behaviour incident or achievement record, then record additional types and subsequently delete these additional types without saving, the points are now calculated correctly, i.e. the points associated with the deleted additional type(s) are not included (via **Focus | Behaviour Management | Maintain Behaviour Incidents** and **Focus | Behaviour Management | Maintain Achievements**).
- When bulk updating student details and you add the Gender field to the display, it is now possible to sort on this field (via **Routines | Student | Bulk Update**).
- When viewing exclusions from the **Pupil** (or **Student**) **Details** page, they are now displayed in date order (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**).
- When adding members to a user defined group, it is now possible to search for people by **Forename** (via **Focus | Groups | User Defined Groups**).
- It is now possible to configure the Home Page following promotion to the new academic year, when a **Home Page** widget has either **Previous Fortnight** or **Week** selected as the cycle filter (via **Focus | Home Page**).
- Only users with the appropriate permissions can now access next of kin details via the Quick Search toolbar (via **Focus | Home Page**).
- When selecting a pupil/student's details to view via the Quick Search toolbar, the correct page (either the **Pupil** (or **Student**) **Details** page or the **Student Teacher View** page) is now displayed, as defined in **Tools | Setups | Student Teacher View** (via **Focus | Home Page**).
- When adding two contacts to a pupil/student (one with a **Contact Type** of **Father** or **Mother** and the other with any other type), clicking the **Parental Addressee** button on the **Student Details** page now adds the contact's initial (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**).

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.

- Administering Dinner Money
- Alternative Curriculum
- Assessment in SIMS
- Managing Communications using InTouch
- Managing Pupil/Students
- Managing Pupil/Student Profiles in SIMS
- Managing SIMS Users, Groups and Databases

- Managing Staff in SIMS
- Monitoring Session and Lesson Registration
- Nova-T
- Producing Attendance Reports
- Producing Lesson Monitor Reports
- Producing Student List, Student Analysis and Timetable Reports
- Producing the Independent Schools Council 2012 Return
- Producing the PLASC 2012 Return (Welsh Nursery Schools)
- Producing the PLASC 2012 Return (Welsh Secondary Schools)
- Producing the PLASC 2012 Return (Welsh Special Schools)
- Producing the Pupil Referral Unit Census 2012 Return
- Producing the School Census Spring 2012 Return (English Nursery Schools)
- Producing the School Census Spring 2012 Return (English Primary/Middle deemed Primary Schools)
- Producing the School Census Spring 2012 Return (English Secondary/Middle deemed Secondary Schools)
- Producing the School Census Spring 2012 Return (English Special Schools)
- Reporting in SIMS
- Setting Up and Administering Cover
- Setting Up and Administering SIMS
- Setting Up and Maintaining Dinner Money
- SIMS Admissions Code of Practice Own Admissions Authority Basic License
- SIMS Admissions Code of Practice Own Admissions Authority Full License
- SIMS Admissions Code of Practice Non Own Admissions Authority Schools in England
- SIMS Pre-Defined Reports Catalogue
- Tracking Pupil Progress in Primary Schools with SIMS Assessment
- Using Progress Grids