SIMS

helping schools inspire

Managing Communications using InTouch

Applicable to 7.186 onwards

Revision History

Version	Change Description	Date
7.186 - 1.0	Initial release.	12/02/2019
7.186 – 1.1	Typo corrected in *What's new in this release?*	29/05/2019

Capita Doc Ref: SS_Comms7186/HBK/290519/CE

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

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Please ensure that you include the module name, version and aspect of documentation on which you are commenting.

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01 | Introduction to InTouch

Introduction

This handbook provides information on how to set up InTouch to keep parents and staff instantly informed about school life and tasks.

SIMS InTouch enables the sending of messages between your school and any person recorded in your SIMS system, e.g. members of staff, parents, contacts, etc. This functionality provides for a better flow of information between your school and any of its contacts in an efficient manner.

The messaging facility provided by SIMS InTouch currently enables communication via the following methods:

- SIMS internal messaging system
- Email
- Short Message Service (SMS).
- Push Notification to the SIMS Parent app where the school uses SIMS Parent.

Messages that have been sent and received are viewed and managed via the **Messages** panel on the SIMS **Home Page** (via **Focus | Home Page**) or from the **Focus** menu (via **Focus | InTouch | Show Messages**).

> ***IMPORTANT NOTE:*** *Prior to using SIMS InTouch, you can customise a variety of defaults for all message types (please see* Setting Up Message Type Defaults *on page* 29*). Default templates for* all *messages are already set up in InTouch. However, you can create your own templates to meet the needs of your establishment (please see* Setting up Message Templates *on page* 17*). Note that message templates provided by SIMS cannot be deleted nor edited.*

More Information:
Setting Up Message Type Defaults on page *29*

Important Note Regarding the Sending of Confidential Information via Email

IMPORTANT NOTE: *Due to the sensitive nature of some of the information that can be sent via SIMS InTouch, careful consideration should be given to report output prior to sending a message.*

You should be mindful of your school's responsibilities with respect to information security. It is your school's responsibility to ensure that:

- *fair processing notices inform parent/carers that email will be used to communicate important information.*
- *email addresses recorded in SIMS are accurate and up-to-date*
- *court orders are recorded promptly and accurately to ensure that barred contacts do not receive emails about a child.*
- *email addresses are not entered 'on the fly' when selecting the recipients of a message, to reduce the risk of a message being sent to the wrong person.*
- *sensitive information is not sent out insecurely.*

Understanding the Types of Message that can be Sent via SIMS InTouch

SIMS InTouch enables messages to be sent from various areas of SIMS. The types of messages that can be generated are discussed in this section. Messages that relate to a specific pupil/student and are sent by SIMS users are introduced in the following table.

Message Type	Accessible Via
Behaviour Message	**Focus | Behaviour Management | Pupil** (or **Student**) **Behaviour**
Exclusion Message	**Focus | Pupil** (or **Student**) **| Exclusions**
Bill Payer Message	**Focus | Fees Billing | Send Message** *NOTE: A Bill Payer message can be sent only if the Fees licence has been applied.*
Applicant General Message	**Focus | Admission | Application** **Focus | Pupil** (or **Student**) **| Special Educational Needs** **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details | Fees Details**

Message Type	**Accessible Via**
Pupil/Student General Message	**Focus | Pupil** (or **Student**) **| Send Pupil** (or **Student**) **Message** and **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** (**Links** panel)
General Message	**Focus | InTouch | Send Message**
SEN Message	**Focus | Pupil** (or **Student**) **| Special Educational Needs**
SEN Reminder Message	On the SIMS **Home Page**, click a SEN reminder in the **My Reminders** panel.
Class Register Message	**Focus | Attendance** (or **Lesson Monitor**) **| Take Register**
Fees Communication Message	**Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** (**Links** panel) *NOTE: A Fees Communication message can be sent only if the Fees licence has been applied.*
SEN Reminder, Detention and Pupil/Student General messages can also be sent from the **Timeline** panel on the **Pupil** (or **Student**) **Teacher View**.	

Messages that do not relate to a specific pupil/student but instead can be sent (with the school being the sender) when specific criteria are met are discussed in the following table. For example, your school can send a communication requesting a reason from a parent/guardian for a pupil/student's absence following the recording of an unexplained absence mark in the register. Subsequently, the parent/guardian's response can be recorded and saved against the pupil/student's attendance record. This process provides an efficient method of contacting appropriate contacts and requesting information. Any messages sent from an external source by a contact of the school are managed using the **Messages** panel on the SIMS **Home Page** (via **Focus | Home Page**).

The following types of message can be sent under the conditions indicated:

Message Type	**Purpose**
Individual Assessment Report Message	Sends a message to pupil/students, InTouch contact, etc. that includes as an attachment an individual report produced by SIMS Assessment.
Missing Marksheets Alert Message	Sends a message to members of staff, reminding them that they have not yet completed the entering of results in an Assessment marksheet.
Attendance Letter Message	Sends a message to a parent/guardian that includes as an attachment their child's attendance letter.
Exceptional Circumstance Message	Sends a message to a parent/guardian, pupil/student, etc. informing them of an exceptional circumstance at your school, e.g. a school closure.

Message Type	Purpose
Late Notification Message	Sends a message to a pupil/student's InTouch contacts or key members of staff, enquiring why the pupil/student was late for a lesson.
Percentage Attendance Message	Sends a message to parental contacts and other interested contacts regarding a pupil/student's school attendance.
Unexplained Absence Message	Sends a message to a parent/guardian, explaining that their pupil/student has an unexplained absence. They are asked to provide a reason for the pupil/student's absence.
Achievement Award Message	Sends a message to a parent/guardian, explaining that their pupil/student has been given an achievement award.
Behaviour Incident Alert Message	Sends a message to parental contacts and other interested contacts when a pupil/student has accumulated a specified number of behaviour points.
Behaviour Incident Message	Sends a message to a parent/guardian, explaining that their pupil/student has been involved in a behaviour incident.
Detention Message	Sends a message to a parent/guardian, informing them that their child has been given a detention.
Cover Slip Message	Sends a message to a member of staff, informing them that they have been assigned Cover.
Dinner Money Letter Message	Sends a message to a pupil/student's InTouch contacts or key members of staff, including as an attachment the selected Dinner Money report.
Exam Reminder Message	Sends a message to internal exam candidates, reminding them of a forthcoming examination.
Exam Results Message	Sends a message to exam candidates, InTouch contact, etc. that includes as an attachment their exam results.
Pupil/Student Exam Timetable Message	Sends a message to exam candidates that includes as an attachment their exam timetable.
Not Approved Pupil/Student Profile Message	Sends a message to a class teacher, informing them that a section of a pupil/student profile has not yet been approved and that the profile needs to be revised.
Pupil/Student Profile Message	Once a pupil/student profile has been generated, a message is sent to class teachers, parents, pupil/students, etc. informing them that the pupil/student report is available.

Message Type	Purpose
School Event Message	Sends a message to all interested parties regarding a school event recorded in the School Diary.
Staff Training Day Message	Sends a message to all interested parties regarding a staff training day recorded in the School Diary.
Pupil/Student Timetable Message	Sends a message to a parent/guardian, pupil/student, etc. that includes as an attachment the pupil/student's timetable.
Staff Timetable Message	Sends a message to a member of staff that includes as an attachment their timetable.
Missing Register	Sends a message to a class teacher, informing them that the register has not yet been taken.

More Information:
Sending Pupil/Student Messages on page *33*
Managing School Messages on page *91*

Understanding Emergency Alerts

It may be necessary for a class teacher to request immediate assistance as a result of an emergency in the classroom. The use of emergency alerts in SIMS InTouch enables a class teacher to request assistance from anywhere in SIMS, both quickly and efficiently.

Prior to this functionality being available, you must select the members of staff who will be notified immediately in the event of an emergency, together with the preferred method of contacting them.

More Information:
Setting Up Emergency Alert Notifications, the Default Communication Method and SMS Matching on page *173*

What's New in this Release?

The following changes have been made in this release.

Changes to Low Priority SMS Text Message Routing for SIMS Parent Schools

InTouch customers who also have SIMS Parent can benefit from sending low priority messages (all messages except emergency alerts or unexplained absence messages) as push messages to SIMS Parent rather than SMS text messages, when the parent/guardian is signed in to the app. Parents can reply directly from SIMS Parent and these replies are visible in InTouch.

Licensing Information

The messaging functionality available in SIMS InTouch is determined by your licence. If you have applied the InTouch licence, all areas of functionality described in this handbook are available. For those schools without the full InTouch licence, only internal messaging is available.

Who do I Contact to Raise a Support Call?

Please be advised that any support calls relating to SIMS InTouch should be raised with your Local Support Unit.

Important Note Regarding the Setting Up of InTouch

This handbook assumes that the setup process for SIMS InTouch has already been completed successfully and that the InTouch licence has been applied (if appropriate).

Permissions Required

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

Additional Resources:

Managing SIMS Users, Groups and Databases handbook

For a list of the permissions available for each release, please refer to the appropriate permissions spreadsheet. Copies can be obtained via the SIMS **Documentation Centre** and from My Account (https://myaccount.capita-cs.co.uk). On My Account, search for <sims version> sims permissions spreadsheet, e.g. 7.186 sims permissions spreadsheet.

Where to Find More Information

A wide range of documentation is available from within SIMS via the **Documentation Centre**. This documentation includes handbooks, mini guides, quick reference sheets, etc. and can be accessed by clicking the **Documentation** button on the SIMS **Home Page**. Once open, click the **Handbooks** button, select the required category then select the required handbook from the **Handbooks** page. References to any other documents mentioned in this handbook can be accessed from the **Documentation Centre** unless otherwise specified. Online help can be accessed by pressing **F1** or clicking the applicable **Help** button.

02 | Updating Primary Contact Details

Introduction

In order to communicate with a contact via SIMS InTouch, a number of criteria must be met.

- The **InTouch Communication** check box must be selected in the contact's record.
- The person must have a telephone number and/or email address marked as **Primary**.
- The person must not currently be the subject of a Court Order.

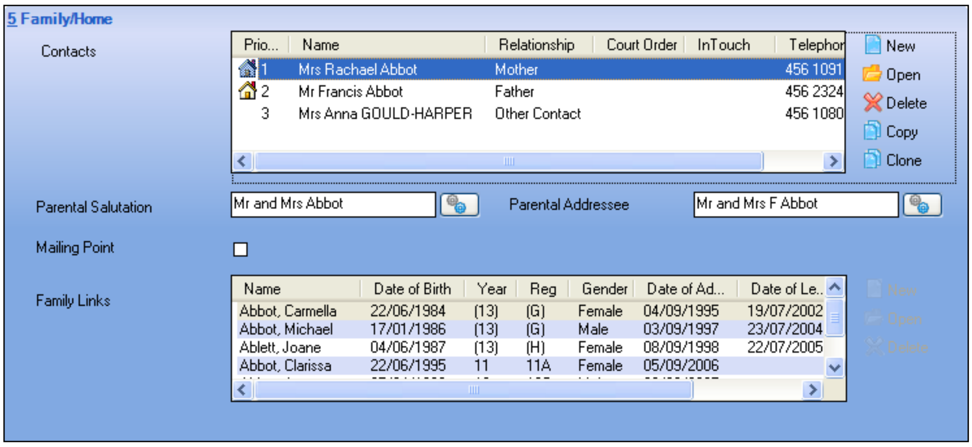
This section describes how SIMS can be set up to enable communication between your school and a contact via SIMS InTouch. It also describes how primary contact details can be updated, in bulk, for pupil/students, pupil/student contacts and applicant contacts. This is an effective method of updating contact details for all pupil/students because it can be done from one screen.

> ***IMPORTANT NOTES:*** *The use of the* ***Primary*** *field should not be confused with that of the* ***Main*** *field. You should continue to use the* ***Main*** *field as it was originally intended.*
>
> *If a contact's telephone number and/or email address is changed, you must carry out the transfer process (using the Discover Administration utility) before the updated contact details are available in Discover and before a message can be sent to Discover groups.*

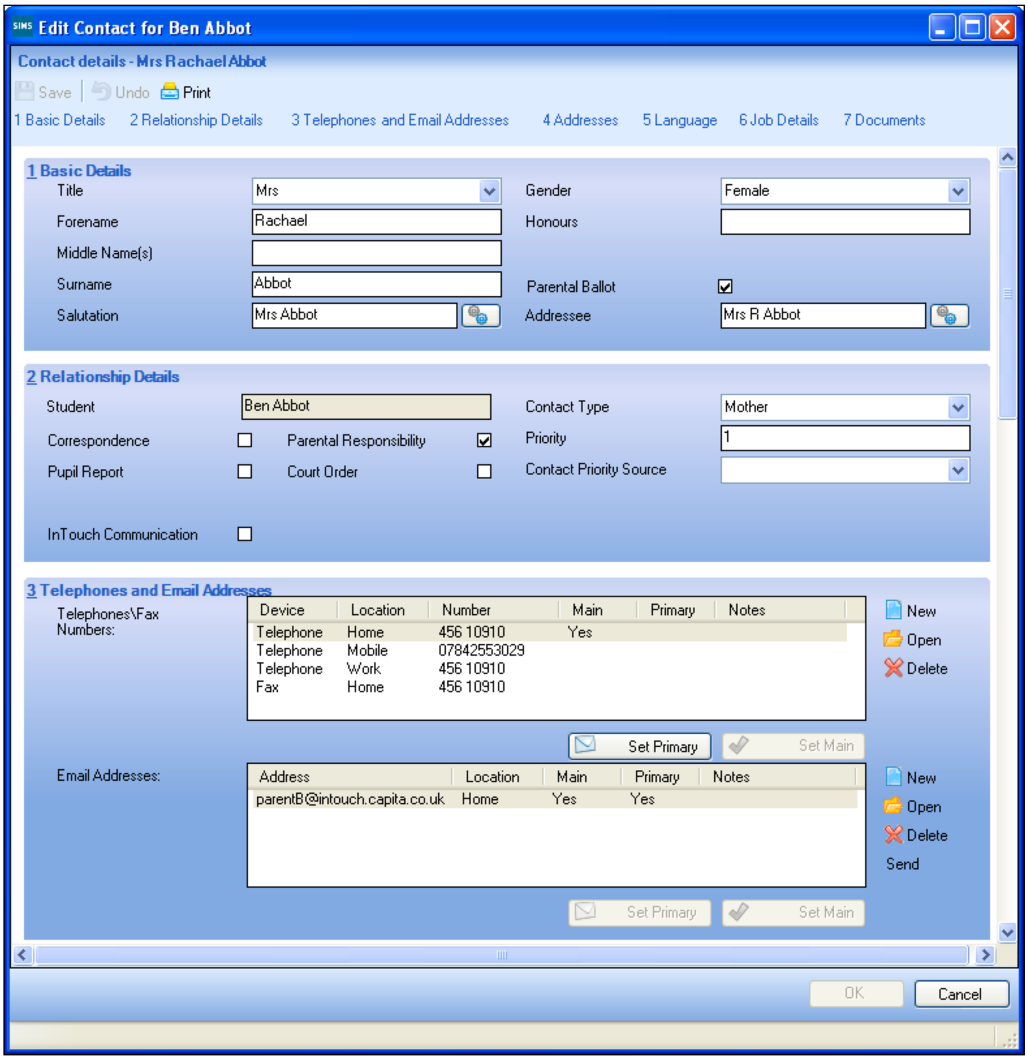
Enabling Contact via SIMS InTouch

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser.
2. Search for then select the pupil/student for whom you wish to edit contact details.

3. Click the **Family/Home** hyperlink to display the **Family/Home** panel.



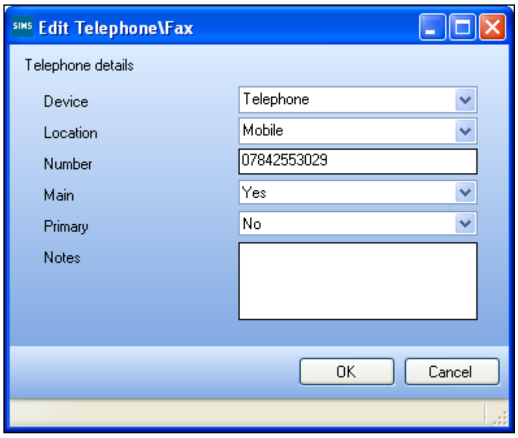
4. Highlight the required person in the **Contacts** table then click the **Open** button to display the **Edit Contact** dialog.



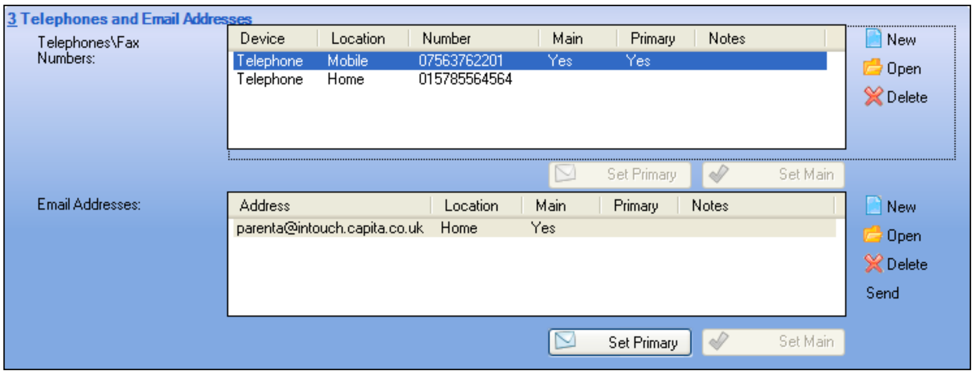
5. In the **Relationship Details** panel, select the **InTouch Communication** check box to enable communication between your school and the selected contact.

> ***IMPORTANT NOTE:*** *If the* ***Court Order*** *check box in the* ***Relationship Details*** *panel is selected, communication between your school and the selected contact will* *<u>not</u>* *be permitted, regardless of the setting of the* ***InTouch Communication*** *check box.*

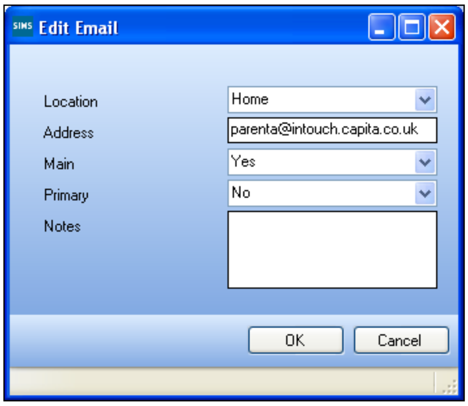
6. From the **Telephones\Fax Numbers** table in the **Telephones and Email Addresses** panel, highlight the telephone number you wish to use for communications then click the **Set Primary** button. Alternatively, click the **Open** button to display the **Edit Telephone\Fax** dialog.



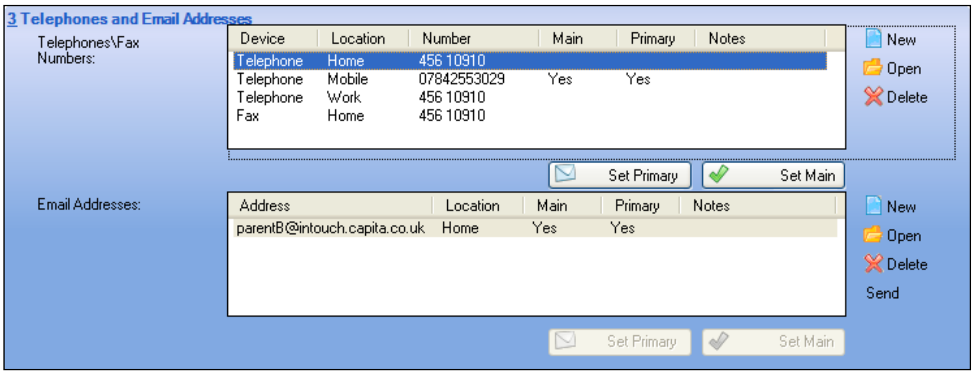
7. Indicate that this is the **Primary** phone number by selecting **Yes** from the drop-down list. Only one number per contact can be set as **Primary**.
8. Click the **OK** button to return to the **Edit Contact** dialog, where the updated information is displayed in the **Telephones and Email Addresses** panel.



9. From the **Email Addresses** table in the **Telephones and Email Addresses** panel, highlight the email address you wish to use for communications then click the **Set Primary** button. Alternatively, click the **Open** button to display the **Edit Email** dialog.



10. Indicate that this is the **Primary** email address by selecting **Yes** from the drop-down list. Only one email address per contact can be set as **Primary**.
11. Click the **OK** button to return to the **Edit Contact** dialog, where the updated information is displayed in the **Telephones and Email Addresses** panel.

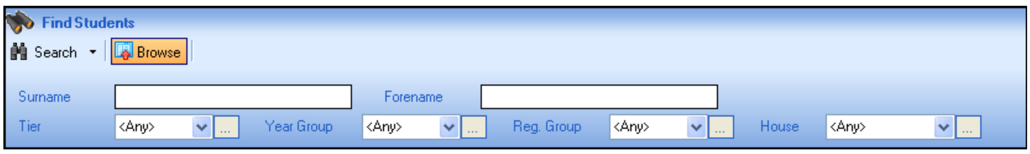


12. Click the **Save** button then click the **OK** button to return to the **Student Details** page.
13. Click the **Save** button to save the changes.

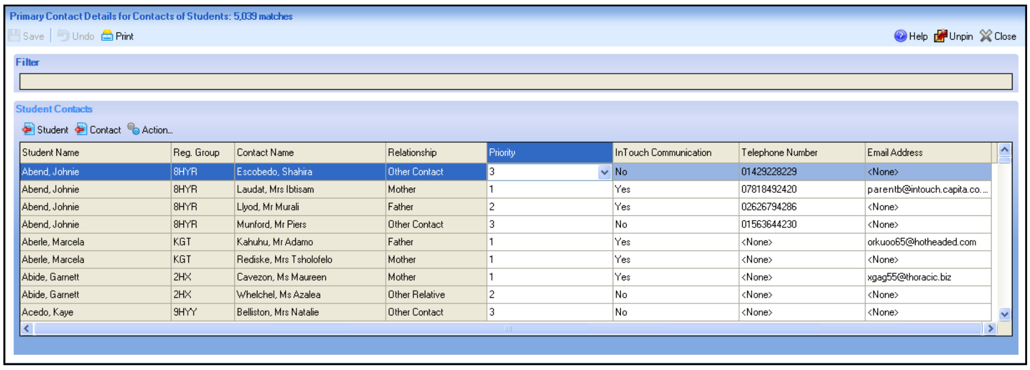
Updating Pupil / Student Contact Details

This process enables you to amend the primary telephone number and email address of all pupil/student contacts and enables communication between the school and a pupil/student contact.

1. Select **Tools | Housekeeping | Primary Contact Details | Contacts of Students** to display the **Find Students** browser.



2. Search for the pupil/student whose contact(s) you wish to update to display their details on the **Primary Contact Details for Contacts of Students** page.



3. The **Filter** panel displays any search criteria selected. To change the filter, click the **Browse** button then repeat step 2 to achieve the correct filter.

   The **Student Contacts** panel displays any pupil/student(s) who meet the search criteria selected, together with contact names and methods of contacting them. The **InTouch Communication** column enables you to indicate whether they can be contacted via SIMS InTouch.

   The **Action** button enables you to change the sort order of the **Student Contacts** table and to select the fields you wish to display in the table. Highlight the cell by which you wish to sort the table, click the **Action** button then select **Sort by this column (<Column Name>)**. To sort by any other column, click the **Action** button, select **Sort by** then the required field name.

   To change the fields displayed in the **Student Contacts** table, perhaps to ensure the correct contact is selected, click the **Action** button, select **Display** then select an additional field to display. You can sort the **Student Contacts** table on any displayed field.

   > *NOTE: All of the functionality provided by the **Action** button is also available by right-clicking a contact then selecting from the drop-down list.*

4. If you are uncertain whether the contact details you are about to edit are for the correct pupil/student contact, highlight their name then click the **Student** button to display the **Student Details** page. Once you have checked that the correct pupil/student has been selected, click the **Close** button to return to the **Primary Contact Details for Contacts of Students** page.

   It is also possible to check whether you are about to edit the correct contact by highlighting their name then clicking the **Contact** button to display the **Contact details** page.

5. Select the contact's **Priority** from the drop-down list. The priority indicates the order in which contacts are alerted in the event of an accident or incident concerning the associated pupil/student.

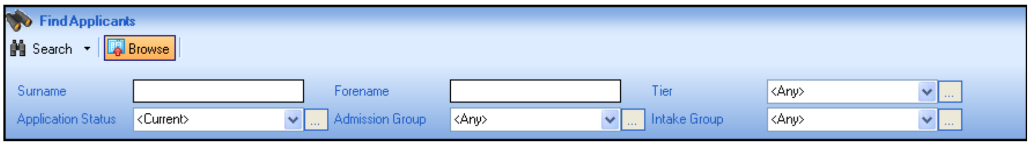
6. Select whether you wish to enable contact via your school and a pupil/student contact by selecting **Yes** or **No** from the **InTouch Communication** column. Selecting **Yes** updates the **InTouch Communication** check box in the **Relationship Details** panel of the contact record.
7. To change the primary **Telephone Number** of a contact, click in the required cell then select a number from the drop-down list. Please note that telephone numbers available from the drop-down list are restricted to those assigned to the contact in the **Telephones and Email Addresses** panel of the **Contact details** page (please see *Enabling Contact via SIMS InTouch* on page 7). Selecting a number from the drop-down list marks it as the **Primary** number automatically.

   If the drop-down list does not display a telephone number then no number is recorded against the contact. A number can be added by selecting **Add** from the drop-down list to display the **Add Telephone\Fax** dialog.
8. Repeat step 7 to record a primary **Email Address**. If the drop-down list does not display an email address then no address is recorded against the contact. An address can be added by selecting **Add** from the drop-down list to display the **Add Email** dialog.
9. Once the contact details have been updated, click the **Save** button to save the changes.

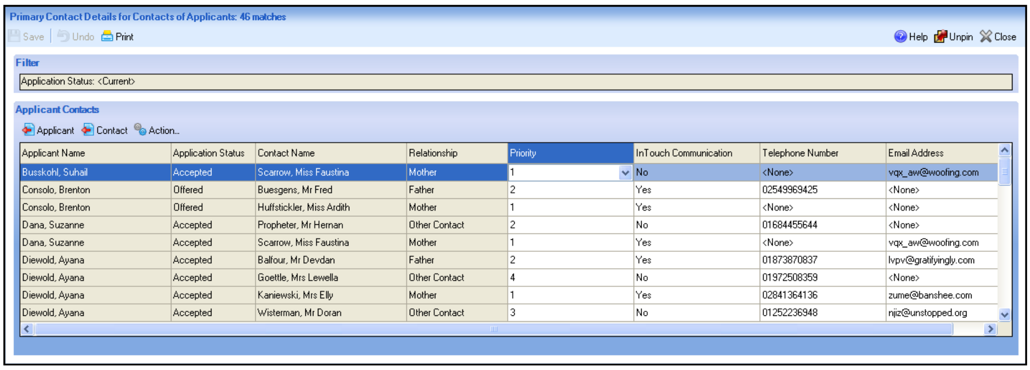
Updating Applicant Contact Details

This process enables you to amend the primary telephone number and email address of all applicant contacts and enables communication between the school and an applicant contact.

1. Select **Tools | Housekeeping | Primary Contact Details | Contacts of Applicants** to display the **Find Applicants** browser.



2. Search for the applicant whose contacts you wish to update to display their details on the **Primary Contact Details for Contacts of Applicants** page.



3. The **Filter** panel displays any search criteria selected. To change the filter, click the **Browse** button then repeat step 2 to achieve the correct filter.

The **Applicant Contacts** panel displays any applicant(s) who meet the search criteria selected, together with contact names and methods of contacting them. The **InTouch Communication** column enables you to indicate whether they can be contacted via SIMS InTouch.

The **Action** button enables you to change the sort order of the **Applicant Contacts** table and to select the fields you wish to display in the table. Highlight the cell by which you wish to sort the table, click the **Action** button then select **Sort by this column (<Column Name>)**. To sort by any other column, click the **Action** button, select **Sort by** then the required field name.

To change the fields displayed in the **Applicant Contacts** table, perhaps to ensure the correct contact is selected, click the **Action** button, select **Display** then select an additional field to display. You can sort the **Applicant Contacts** table on any displayed field.

*NOTE: All of the functionality provided by the **Action** button is also available by right-clicking a contact then selecting from the drop-down list.*

4. If you are uncertain whether the contact details you are about to edit are for the correct applicant contact, highlight their name then click the **Applicant** button to display the **Application** page. Once you have checked that the correct applicant has been selected, click the **Close** button to return to the **Primary Contact Details for Contacts of Applicants** page.

   It is also possible to check whether you are about to edit the correct contact by highlighting their name then clicking the **Contact** button to display the **Contact details** page.
5. Select the contact's **Priority** from the drop-down list. The priority indicates the order in which contacts are alerted in the event of an accident or incident concerning the associated applicant.
6. Select whether you wish to enable contact via your school and a pupil/student contact by selecting **Yes** or **No** from the **InTouch Communication** column. Selecting **Yes** updates the **InTouch Communication** check box in the **Relationship Details** panel of the contact record.
7. To change the primary **Telephone Number** of a contact, click in the required cell then select a number from the drop-down list. Please note that telephone numbers available from the drop-down list are restricted to those assigned to the contact in the **Telephones and Email Addresses** panel of the **Contact details** page (please see *Enabling Contact via SIMS InTouch* on page 7). Selecting a number from the drop-down list marks it as the **Primary** number automatically.

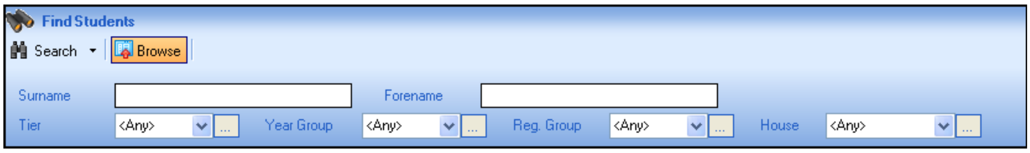
   If the drop-down list does not display a telephone number then no number is recorded against the contact. A number can be added by selecting **Add** from the drop-down list to display the **Add Telephone\Fax** dialog.
8. Repeat step 7 to record a primary **Email Address**. If the drop-down list does not display an email address then no address is recorded against the contact. An address can be added by selecting **Add** from the drop-down list to display the **Add Email** dialog.

9. Select whether you wish to enable contact via your school and an applicant contact by selecting **Yes** or **No** from the **InTouch Communication** column. Selecting **Yes** updates the **InTouch Communication** check box in the **Relationship Details** panel of the contact record.
10. Once the contact details have been updated, click the **Save** button to save the changes.

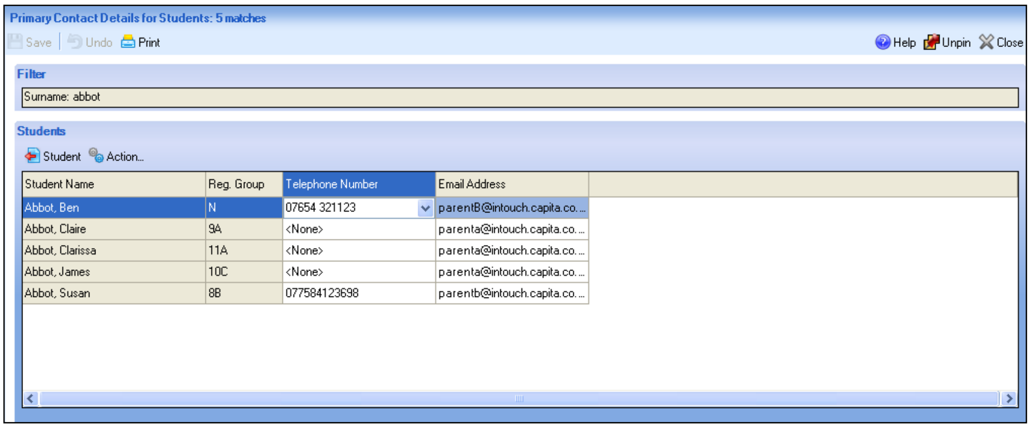
Updating Pupil/Student Details

This process enables you to amend the primary telephone number and email address of all pupil/students and enables communication between the school and the pupil/student.

1. Select **Tools | Housekeeping | Primary Contact Details | Students** to display the **Find Students** browser.



2. Search for the pupil/student whose details you wish to update to display their details on the **Primary Contact Details for Students** page.



3. The **Filter** panel displays any search criteria selected. To change the filter, click the **Browse** button then repeat step 2 to achieve the correct filter.

   The **Student** panel displays any pupil/student(s) who meet the search criteria selected, together with their contact details.

   The **Action** button enables you to change the sort order of the **Student Contacts** table and to select the fields you wish to display in the table. Highlight the cell by which you wish to sort the table, click the **Action** button then select **Sort by this column (<Column Name>)**. To sort by any other column, click the **Action** button, select **Sort by** then the required field name.

   To change the fields displayed in the **Students** table, perhaps to ensure the correct contact is selected, click the **Action** button, select **Display** then select an additional field to display. You can sort the **Students** table on any displayed field.

> *NOTE: All of the functionality provided by the **Action** button is also available by right-clicking a pupil/student then selecting from the drop-down list.*

4. If you are uncertain whether the details you are about to edit are for the correct pupil/student, highlight their name then click the **Student** button to display the **Student Details** page. Once you have checked that the correct pupil/student has been selected, click the **Close** button to return to the **Primary Contact Details for Students** page.
5. To change the primary **Telephone Number** of a pupil/student, click in the required cell then select a number from the drop-down list. Please note that telephone numbers available from the drop-down list are restricted to those assigned to the pupil/student in the **Telephones and Email Addresses** panel of the **Student Details** page (please see *Enabling Contact via SIMS InTouch* on page *7*). Selecting a number from the drop-down list marks it as the **Primary** number automatically.

   If the drop-down list does not display a telephone number then no number is recorded against the pupil/student. A number can be added by selecting **Add** from the drop-down list to display the **Add Telephone\Fax** dialog.
6. Repeat step 5 to record a primary Email Address. If the drop-down list does not display an email address then no address is recorded against the pupil/student. An address can be added by selecting **Add** from the drop-down list to display the **Add Email** dialog.
7. Once the contact details have been updated, click the **Save** button to save the changes.

03 | Setting up Message Templates

Introduction

Message templates are used to define the presentation of messages sent from SIMS, including the disclaimer that is appended to any outgoing email messages. Templates can be used to define the default message font, character alignment and any default text that will be displayed in a message.

Templates are available for all message types that can be sent using SIMS InTouch. When viewing and editing their content, templates are grouped by module area, e.g. **Conduct**, **Exams**, **SEN**, etc. An additional template category relates to email disclaimers. Message templates can be set up for each message type in each of these categories. Once message templates are set up, they can be applied to messages sent from SIMS.

> ***IMPORTANT NOTE:*** *Default templates for all messages are already set up in InTouch. However, you can create your own templates to meet the needs of your establishment (please see* Setting up Message Templates *on page* 17*). Note that message templates provided by SIMS cannot be deleted nor edited.*

Pupil/Student Messages

Messages that relate to a specific pupil/student are sent manually by SIMS users. The following message types can be sent and templates can be created for each of these message types.

General Message	Pupil/Student General	Applicant General
SEN Message	SEN Reminder Message	Behaviour Message
Exclusion Message	Class Register Message	Fees Communication Message
Bill Payer Message		

NOTES: Fees Communication and Bill Payer messages can be sent only if you have applied the Fees licence.

*SEN Reminder, Detention and Pupil/Student General messages can also be sent from the **Timeline** panel on the **Pupil** (or **Student**) **Teacher View**.*

School Messages

These are messages that do not relate to a specific pupil/student but instead can be sent (with the school being the sender) when specific criteria are met. The following message templates are provided as part of the installation process.

Unexplained Absence	Behaviour Incident Message	Achievement Award Message
Pupil/Student Profile Message	Missing Register	Not Approved Pupil/Student Profile
Exceptional Circumstance Message	School Event Message	Staff Training Day Message
Percentage Attendance Message	Detention Message	Pupil/Student Timetable Message
Staff Timetable Message	Behaviour Incident Alert Message	Missing Marksheets Alert Message
Pupil/Student Exam Timetable Message	Exam Reminder Message	Late Notification Message
Attendance Letter Message	Exam Results Message	Individual Assessment Report Message
Dinner Money Letters	Cover Slips	

Templates provided by SIMS cannot be edited directly. Instead, they can be copied and you can edit the copy of the template, if required. Alternatively, you can create your own message templates for any of the message types. If you mark a message template as the *default*, SIMS uses the selected template automatically when a message of that type is created.

***IMPORTANT NOTE:** Once a message template has been edited and saved, the changes cannot be undone.*

You can make a copy of an existing template and then use it to form the basis of a new template, meaning you do not have to create similar templates from scratch.

Email Disclaimer Message Template

It is possible to define the email disclaimer that is displayed at the bottom of every email sent by SIMS InTouch. A default email disclaimer message template is provided as part of the installation process.

NOTES: If you decide not to edit the email disclaimer, the SIMS-defined email disclaimer will continue to be displayed at the end of every email.

Email disclaimers are not displayed on Emergency Alert messages.

Templates provided by SIMS cannot be edited directly. Instead, they can be copied and you can edit the copy of the template, if required. Alternatively, you can create your own email disclaimer message templates. If you mark an email disclaimer message template as the *default*, SIMS uses the selected template automatically when an email is sent.

IMPORTANT NOTE: *Once a message template has been edited and saved, the changes cannot be undone.*

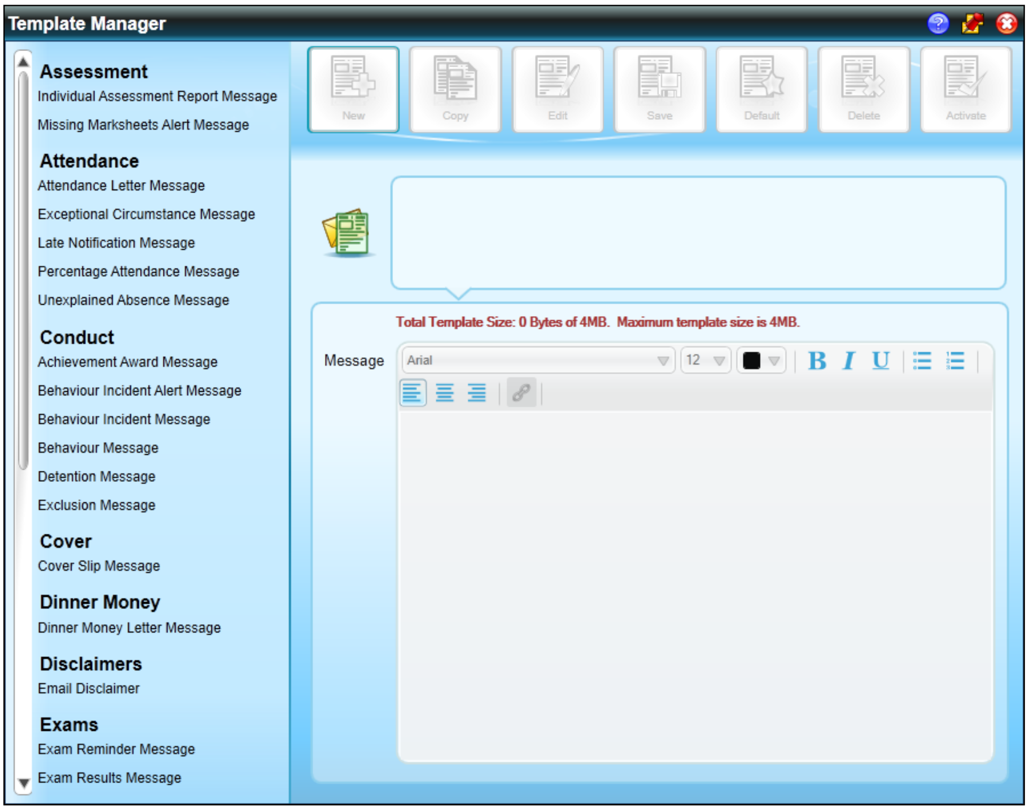
You can make a copy of an existing template and then use it to form the basis of a new template, meaning you do not have to create similar templates from scratch.

The adding, editing, deletion, etc. of an email disclaimer message template is performed in the same way as any other message template. Email disclaimer message templates are managed via the **Disclaimers** section of the **Template Manager** page. The default template is named **Email Disclaimer**.

WARNING: *If the Routing service is down, message templates become unavailable and consequently the email disclaimer is not appended to a message.*

Viewing Message Templates

1. Select **Tools | InTouch | Templates Setup** to display the **Template Manager** page.



The panel on the left-hand side of the page provides access to the message templates. The templates are either provided as part of the installation process or created by users in your establishment.

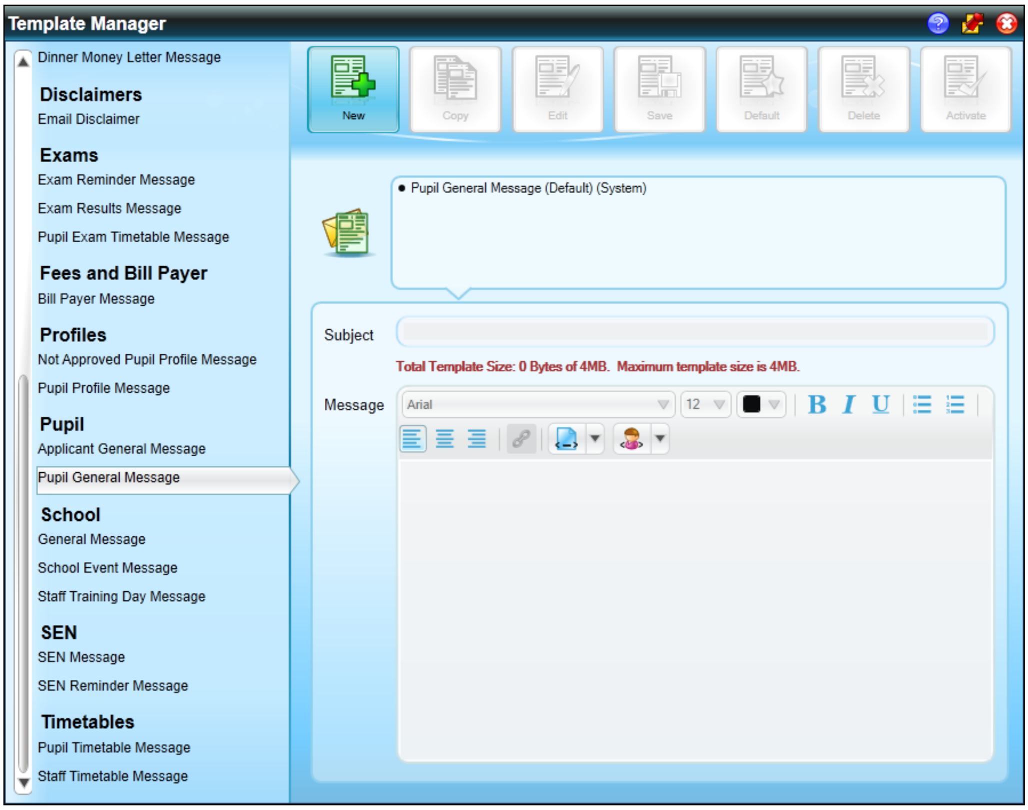
2. Click a message type (e.g. **Behaviour Message**) to view the associated message templates in the panel at the top of the page.

   Where more than one message template exists, all of them are available to users when they create a message of that type. Where more than one message template exists for a category, one of them must be marked as *default*. The message template marked as default will be selected automatically when SIMS creates a message of that type, although the template can be changed when a message is created.

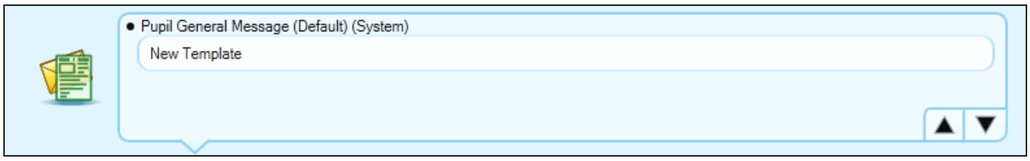
Adding a Message Template

1. Select **Tools | InTouch | Templates Setup** to display the **Template Manager** page.
2. In the list in the panel on the left-hand side of the page, click the type of message template you wish to create, e.g. **Pupil** (or **Student**) **General Message**.

On the right-hand side of the screen, the top panel displays all message templates recorded in SIMS for the selected template category.

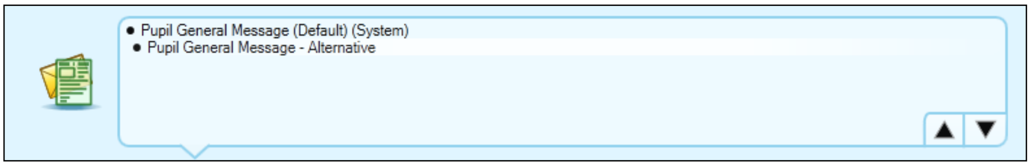


3. Click the **New** button to add a new template for the selected category.



The new template is given a default name of `New Template` and is indented to indicate that it is the currently selected template.

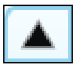
4. Click anywhere in the line that reads `New Template`, enter an appropriate name for the new template then press **Enter**.



The order in which the templates are displayed in this list reflects the order in which they will be displayed when a user elects to apply a template to a specific type of message.

5. Click the **Move Up** and **Move Down** arrow buttons to move the template to the required position in the list.

NOTE: It is advisable to place the most commonly used template at the top of the list to facilitate selection.

 *Move Up button*

 *Move Down button*

6. With the newly created template highlighted, click the **Edit** button to enable its editing in the panel at the bottom of the **Template Manager** page.
7. Click the **Save** button.

   The new message template is now ready to be applied to a message created in the selected category.

More Information:
Editing a Message Template on page *24*

Copying a Message Template

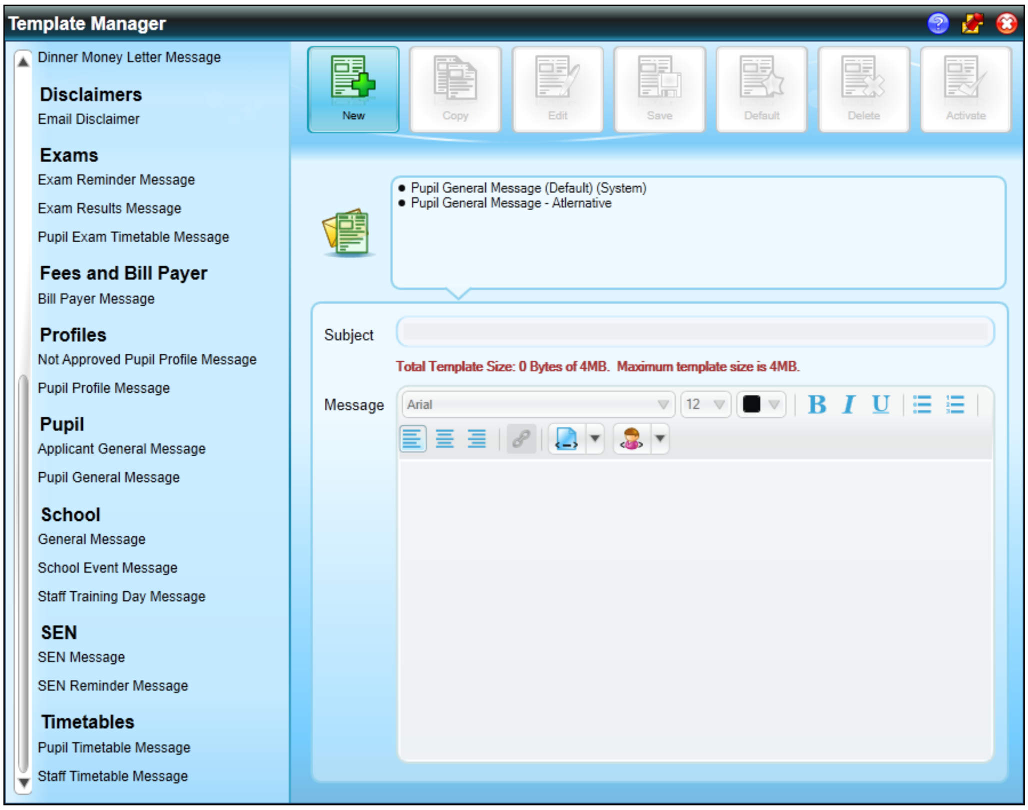
You can make a copy of an existing template and then edit it to form the basis of a new template, reducing the need to create similar templates from scratch.

Once a message template has been copied, it can be renamed, edited and saved as a new template.

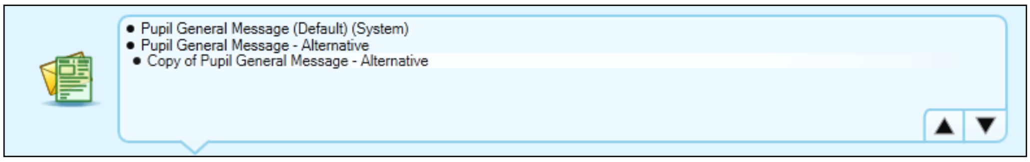
NOTE: A message template can be copied within a message type only. It is not possible to copy a template from one message type to another.

1. Select **Tools | InTouch | Templates Setup** to display the **Template Manager** page.
2. In the list in the panel on the left-hand side of the page, click the category of message template that contains the message template you wish to copy, e.g. **Pupil** (or **Student**) **General**.

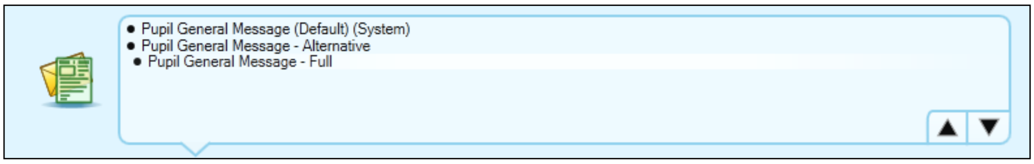
On the right-hand side of the screen, the top panel displays all message templates recorded in SIMS for the selected template category.



3. In the top panel on the right-hand side of the page, highlight the message template you wish to copy.
4. Click the **Copy** button to create a copy of the highlighted message template. The name of the new template is prefixed with `Copy of`.

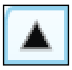


5. With the new message template highlighted, click the **Edit** button.
6. Click anywhere in the name of the new message template (prefixed with `Copy of`), enter an appropriate name then press **Enter**.



The order in which the templates are displayed in this list reflects the order in which they will be displayed when a user elects to apply a template to a specific type of message.

7. Click the **Move Up** and **Move Down** arrow buttons to move the template to the required position in the list.



Move Up button

Move Down button

> *NOTE: It is advisable to place the most commonly used template at the top of the list to facilitate selection.*

8. Highlight the new message template then click the **Edit** button to enable its editing in the panel at the bottom of the **Template Manager** page.
9. Click the **Save** button.

   The new message template is now ready to be applied to a message created in the selected category.

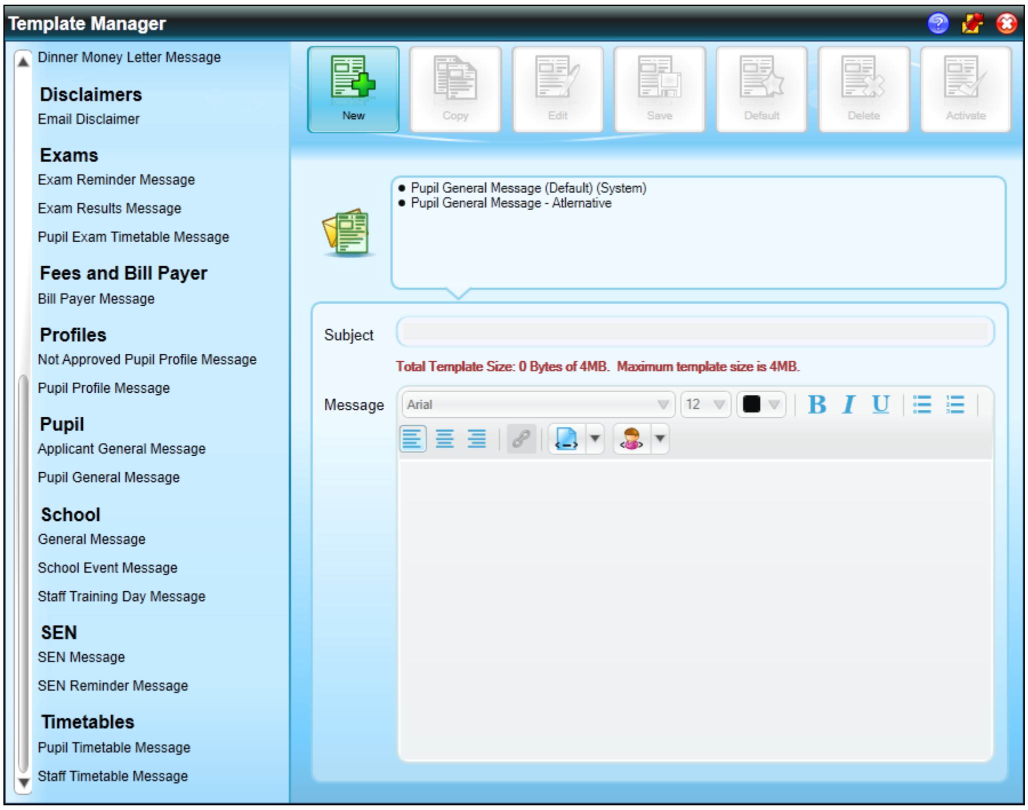
More Information:
Editing a Message Template on page *24*

Editing a Message Template

> *NOTE: It is not possible to edit message templates provided by SIMS.*

1. Select **Tools | InTouch | Templates Setup** to display the **Template Manager** page.
2. In the list in the panel on the left-hand side of the page, click the category of message template that contains the message template you wish to edit, e.g. **Pupil** (or **Student**) **General**.

On the right-hand side of the screen, the top panel displays all message templates recorded in SIMS for the selected template category.



3. In the top panel on the right-hand side of the page, highlight the message template you wish to edit then click the **Edit** button to enable its editing in the panel at the bottom of the **Template Manager** page.

   *NOTE: Prior to clicking the **Edit** button, ensure that the newly created template is highlighted. It is not possible to edit the template unless it is highlighted in the list.*

4. In the **Subject** line, enter any default text that you wish to include in the **Subject** line of any message created from this template.

   *NOTE: When a message is created from this template, the default **Subject** line can be edited, if required.*

5. In the **Message** box, enter any default text you wish to include in the main body of any message created from this template.

   *NOTE: When a message is created from this template, the default **Message** text can be edited, if required.*

6. The default font, font size, font colour, etc. can be set for a template using the formatting toolbar.

The functionality available on the formatting toolbar varies according to the type of message template selected.

Images can also be included as part of a message template or a message.

7. Once the appropriate content has been entered and the formatting applied, click the **Save** button.

   The message template is now ready to be applied to a message of the type selected.

More Information:
Formatting Message Text on page *63*
Inserting a Hyperlink into the Message Text on page *64*
Adding an Image into a Message on page *66*

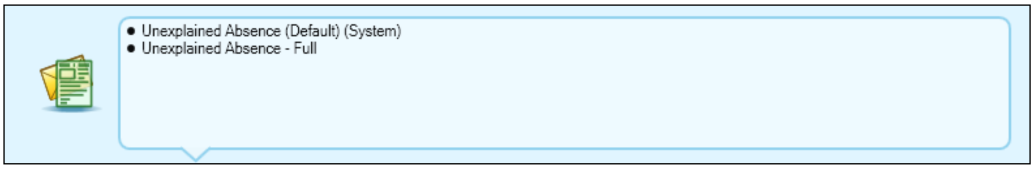
Setting a School Message Template as the Default

Any number of message templates can be defined for a single message category. If more than one message template exists for a category, you must set one of them as the default. If you create a range of message templates and wish to use one of them instead of the one provided as part of the SIMS installation, you can make your own message template the default then de-activate the SIMS supplied one.

The default message template is used when a message of that type is generated by SIMS.

If only one message template for a category exists, it is set as the default template automatically.

1. Select **Tools | InTouch | Templates Setup** to display the **Template Manager** page.
2. In the list in the panel on the left-hand side of the page, click the required group of message templates to display the associated message template(s) in the top panel on the right-hand side of the page.



   The name of the message template that is currently marked as the default is appended with `(Default)`. Message templates provided by SIMS are appended with `(System)`.

3. If more than one message template exists in the list and you wish to change the message template used as the default, highlight the required message template then click the **Default** button.

   Once selected, `(Default)` is displayed at the end of the name of the message template.
4. Click the **Save** button.

More Information:
Adding a Message Template on page *20*

Activating and De-activating a Message Template

Once a message template is created, it is activated automatically so that it is accessible by all users. If you no longer want a message template to be used (either temporarily or permanently), it can be made inactive.

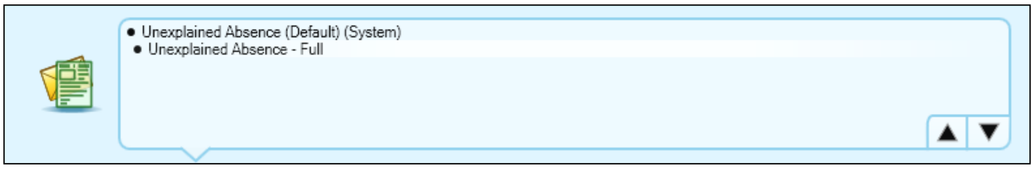
If you create a range of message templates and wish to use one of them instead of the one provided as part of the SIMS installation, you can make your own message the default (please see *Setting a School Message Template as the Default* on page *26*) then de-activate the SIMS supplied one. SIMS supplied School message templates cannot be deleted.

If you are certain you will never want to use the message template again, you may instead choose to delete it.

To make a message template inactive:

1. Select **Tools | InTouch | Templates Setup** to display the **Template Manager** page.
2. In the list in the panel on the left-hand side of the page, click the group of message templates that contains the message template you wish to make inactive, e.g. **General Message**.

   On the right-hand side of the screen, the top panel displays all message templates recorded in SIMS for the selected template category.
3. In the top panel on the right-hand side of the page, highlight the message template you wish to make inactive.



4. Click the **Deactivate** button then click the **Save** button. The template name is now suffixed with `(Inactive)`.

   The message template remains highlighted and the **Deactivate** button is renamed to **Activate**.
5. To re-activate the message template, highlight the inactive message template, click the **Activate** button then click the **Save** button.

More Information:
Deleting a Message Template on page *27*

Deleting a Message Template

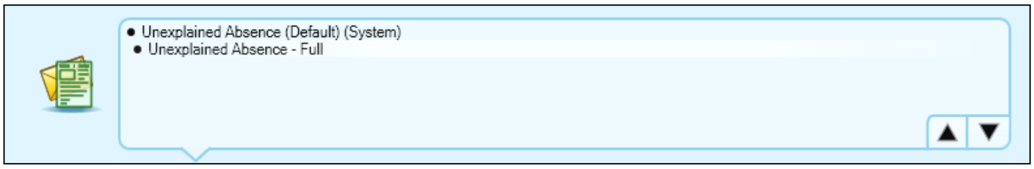
If you are certain you never want to use a message template again, you may wish to delete it.

> *NOTE: It is not possible to delete a School message template provided by SIMS.*
>
> *It is not possible to delete the default School message template. To delete a School message template currently marked as default, you must first make another message template the default.*

Instead of deleting a message template however, you may wish to make it inactive. This retains the template on your system but it becomes unavailable for selection when creating a message. Any template set as inactive can be activated at any time.

1. Select **Tools | InTouch | Templates Setup** to display the **Template Manager** page.
2. In the list in the panel on the left-hand side of the page, click the group of message templates that contains the message template you wish to delete, e.g. **General Message**.

   On the right-hand side of the screen, the top panel displays all message templates recorded in SIMS for the selected template category.
3. In the top panel on the right-hand side of the page, highlight the message template you wish to delete.



4. Click the **Delete** button. The template name is now displayed in strikethrough text (a horizontal line across its name) to indicate that it is marked for deletion and the button label is renamed **Un Delete**.

   > *NOTE: At this point, the message template is just marked for deletion; it has not yet been deleted so it can still be retrieved.*

5. Confirm the deletion by clicking the **Save** button. Alternatively, cancel the deletion by highlighting the template then clicking the **Un Delete** button.

   When the template is deleted, its name is removed from the list in the top panel and is no longer available for selection when creating a message.

More Information:
Setting a School Message Template as the Default on page *26*
Activating and De-activating a Message Template on page *27*

04 | Configuring Message Type Defaults

Introduction

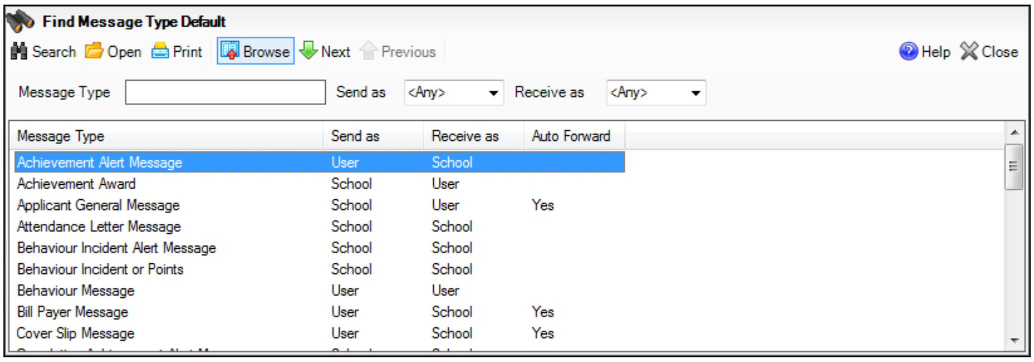
This chapter describes how to set up the defaults for each message type. More specifically, School Administrators can define for each message type:

- the owner, e.g. School or User. This determines who has visibility of outgoing and incoming messages.
- the default InTouch recipient.
- the external email account to which messages can be sent.

After customising the required defaults, these are changed immediately for all the users.

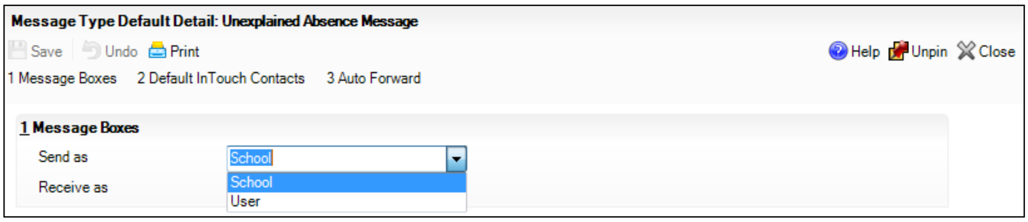
Setting Up Message Type Defaults

1. Select **Tools | InTouch | Message Type Defaults Setup** to display the **Find Message Type Default** browser.

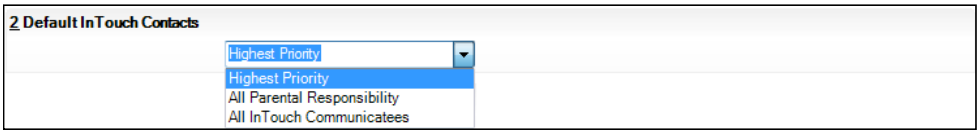


2. Search for the required **Message Type**. The number of message types can be restricted by using the applicable search fields and drop-down lists. Use the **Search** fields to enter or select the required criteria. Alternatively, click the **Search** button to display all the message types.
3. Double-click the required **Message Type** to select it.

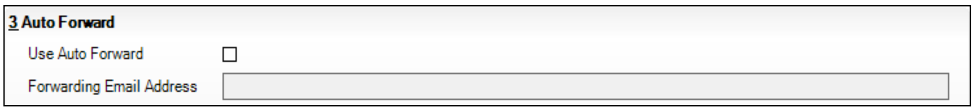
4. On the **Message Type Default Detail** page, click the **Message Boxes** hyperlink.



5. From the **Send as** drop-down list, select the owner of sent messages of this type (i.e. **School**, **User**).
6. From the **Receive as** drop-down list, select the owner of received messages of this type (i.e. **School**, **User**).
7. Click the **Save** button.
8. Click the **Default InTouch Contacts** hyperlink.



9. Select the InTouch recipient type from the drop-down list.
   - Select **Highest Priority** to select automatically as a potential intended recipient of the message the pupil/students' or applicants' contact(s) with the highest recorded priority who have parental responsibility (unless they have been recorded as having a court order against them).
   - Select **All Parental Responsibility** to select automatically as a potential intended recipient of the message the pupil/students' or applicants' contact(s) who are recorded as having parental responsibility (unless they have been recorded as having a court order against them).
   - Select **All InTouch Communicatees** to select automatically as a potential intended recipient of the message the pupil/students' or applicants' contact(s) who are recorded as being eligible for communication via InTouch (unless they have been recorded as having a court order against them), regardless of their contact priority or parental responsibility.
10. Click the **Save** button.
11. Click the **Auto Forward** hyperlink.



12. Select the **Use Auto Forward** check box if you want to forward automatically the selected message type to an external account. This setting is particularly useful for admin users who need to work on their messages outside of InTouch.
13. Populate the **Forwarding Email Address** field with the required email account.

14. Click the **Save** button.

05 | Sending Pupil/Student Messages

Introduction

> ***WARNING:*** *This chapter assumes that your School Administrator did not change system's message type defaults in the* ***Message Boxes*** *panel (via* ***Tools | InTouch | Message Type Defaults Setup****) during the InTouch installation.*

There are two categories of message that can be sent from SIMS: Pupil/Student messages and School messages. Once the appropriate message templates have been set up, they can be applied to messages sent from SIMS.

More Information:
Setting Up Message Type Defaults on page *29*

Pupil/Student Message

These are messages that are sent manually by SIMS users. The following message types can be sent and templates can be created for each of these message types.

General Message	Pupil/Student General	Applicant General
SEN Message	SEN Reminder Message	Behaviour Message
Exclusion Message	Class Register Message	Fees Communication Message
Bill Payer Message		

> *NOTES: Fees Communication and Bill Payer messages can be sent only if you have applied the Fees licence.*
>
> *SEN Reminder, Detention and Pupil/Student General messages can also be sent from the* ***Timeline*** *panel on the* ***Pupil*** *(or* ***Student****)* ***Teacher View****.*

School Message

These are messages that can be sent by SIMS (i.e. your school) under specific circumstances. The following message templates are provided as part of the installation process.

Unexplained Absence	Behaviour Incident Message	Achievement Award Message
Pupil/Student Profile Message	Missing Register	Not Approved Pupil/Student Profile
Exceptional Circumstance Message	School Event Message	Staff Training Day Message
Percentage Attendance Message	Detention Message	Pupil/Student Timetable Message
Staff Timetable Message	Behaviour Incident Alert Message	Missing Marksheets Alert Message
Pupil/Student Exam Timetable Message	Exam Reminder Message	Late Notification Message
Attendance Letter Message	Exam Results Message	Individual Assessment Report Message
Dinner Money Letters	Cover Slips	

More Information:
Managing School Messages on page *91*

Accessing the Messaging Facility

Pupil/Student messages can be sent from a number of areas in SIMS. The type of message generated is determined by the area of SIMS selected when the messaging functionality is triggered. Once the appropriate SIMS menu route has been selected, the method of preparing and sending a message is very similar for all types of messages. Additional functionality is available for some types of message. The following table introduces the types of Pupil/Student message that can be created and indicates where in SIMS that type of message can be created.

Message Type	Accessible Via
Behaviour Message	**Focus | Behaviour Management | Pupil** (or **Student**) **Behaviour**
Exclusion Message	**Focus | Pupil** (or **Student**) **| Exclusions**
Bill Payer Message	**Focus | Fees Billing | Send Message** *NOTE: A Bill Payer message can be sent only if the Fees licence has been applied.*

Message Type	Accessible Via
Applicant General Message	**Focus | Admission | Application** **Focus | Pupil** (or **Student**) **| Special Educational Needs** **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details | Fees Details**
Pupil/Student General Message	**Focus | Pupil** (or **Student**) **| Send Pupil** (or **Student**) **Message** and **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** (**Links** panel)
General Message	**Focus | InTouch | Send Message**
SEN Message	**Focus | Pupil** (or **Student**) **| Special Educational Needs**
SEN Reminder Message	On the SIMS **Home Page**, click a SEN reminder in the **My Reminders** panel.
Class Register Message	**Focus | Attendance** (or **Lesson Monitor**) **| Take Register**
Fees Communication Message	**Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** (**Links** panel) *NOTE: A Fees Communication message can be sent only if the Fees licence has been applied.*
SEN Reminder, Detention and Pupil/Student General messages can also be sent from the **Timeline** panel on the **Pupil** (or **Student**) **Teacher View**.	

*NOTE: Accessing the messaging functionality using one of the menu routes described in the table enables you to change to any of the other message types, if required. The only exception is a General Message (**Focus | In Touch | Send Message**), where the type of message cannot be changed.*

When you are preparing a message to be sent, the intended recipients can be selected, files can be attached and a wide range of text and paragraph formatting can be applied.

General Messages

A General Message should be created if its subject matter is general in nature and is not linked directly to any of the other message types. When selecting the intended recipients, the search criteria **Category** defaults to show all people who are currently associated with your school (**Current**).

In the case where a pupil/student has one or more siblings currently attending your school, SIMS InTouch 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.

Select **Focus | InTouch | Send Message** to display the **Send General Message** page.

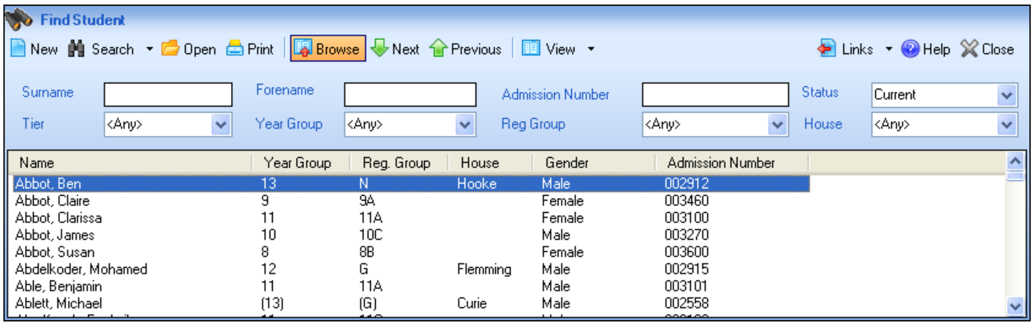
More Information:
Sending a Pupil/Student Message on page *52*

Pupil/Student General Message (Single Pupil/Student)

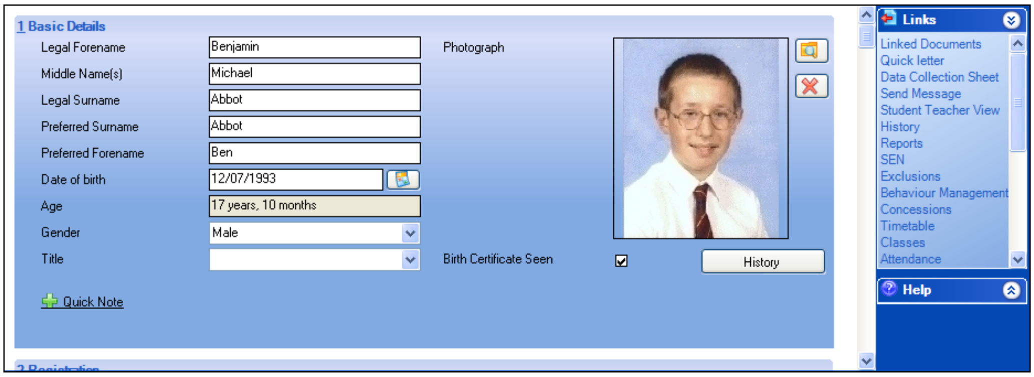
A Pupil/Student General Message can be created from the **Pupil** (or **Student**) **Details** page and is therefore linked automatically to the selected pupil/student's record. When selecting the intended recipients, the search criteria **Category** defaults to show all people who are currently associated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

It is also possible to send a Pupil/Student General Message relating to multiple pupil/students (please see *Pupil/Student General Message (Multiple Pupil/Students)* on page *38*).

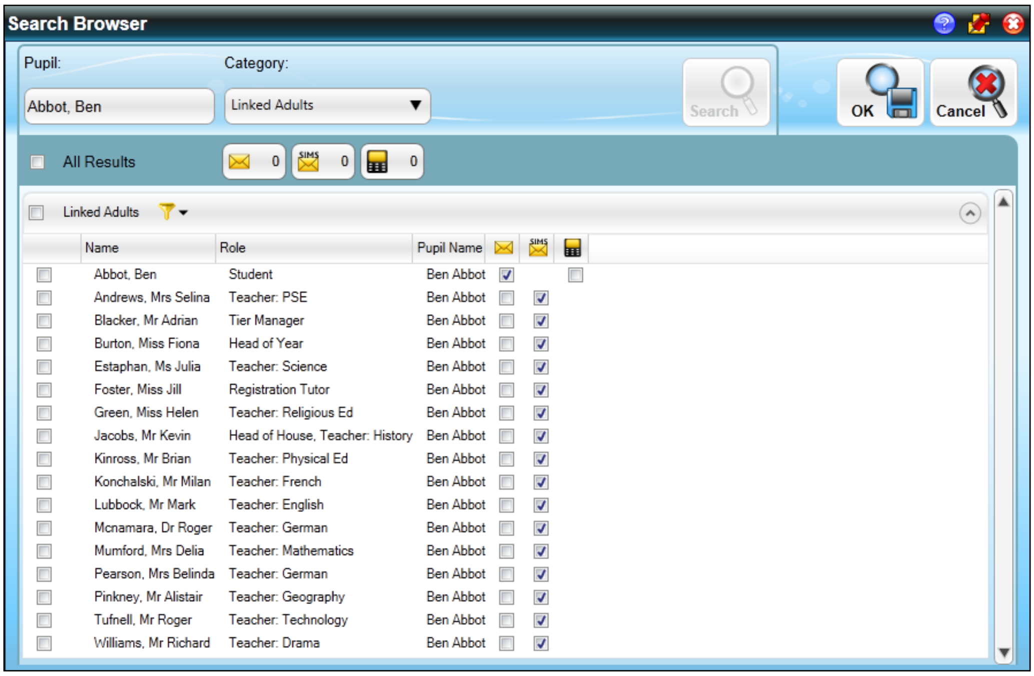
1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser.



2. Search for then select the required pupil/student to display their details on the **Pupil** (or **Student**) **Details** page.

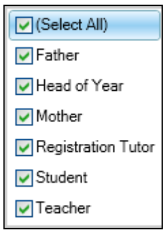


3. In the **Links** panel on the right-hand side of the page, click the **Send Message** hyperlink to display the **Search** browser.



4. To facilitate the selection of a group of people in the **Linked Adults** panel, click the **Filter** button to display all of the roles represented in the **Linked Adults** panel.

Filter button



5. Select or deselect the appropriate check box(es), leaving selected only the check box of the role(s) you wish to select from. Deselect the **Select All** check box to deselect all of the check boxes.

   The instructions in the section referenced in the table (below) relate to sending a General Message, but they are relevant for all types of message that can be sent manually (apart from step 1, which is redundant when sending a Pupil/Student General Message).

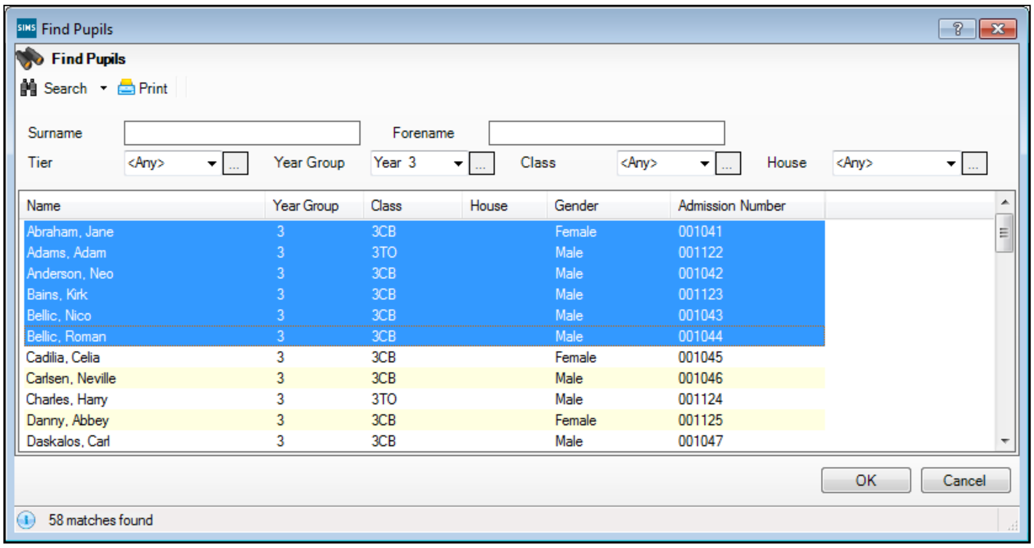
More Information:
Sending a Pupil/Student Message on page *52*

Pupil/Student General Message (Multiple Pupil/Students)

A Pupil/Student General Message can be created, which enables you to record communications about specific pupil/students. 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.

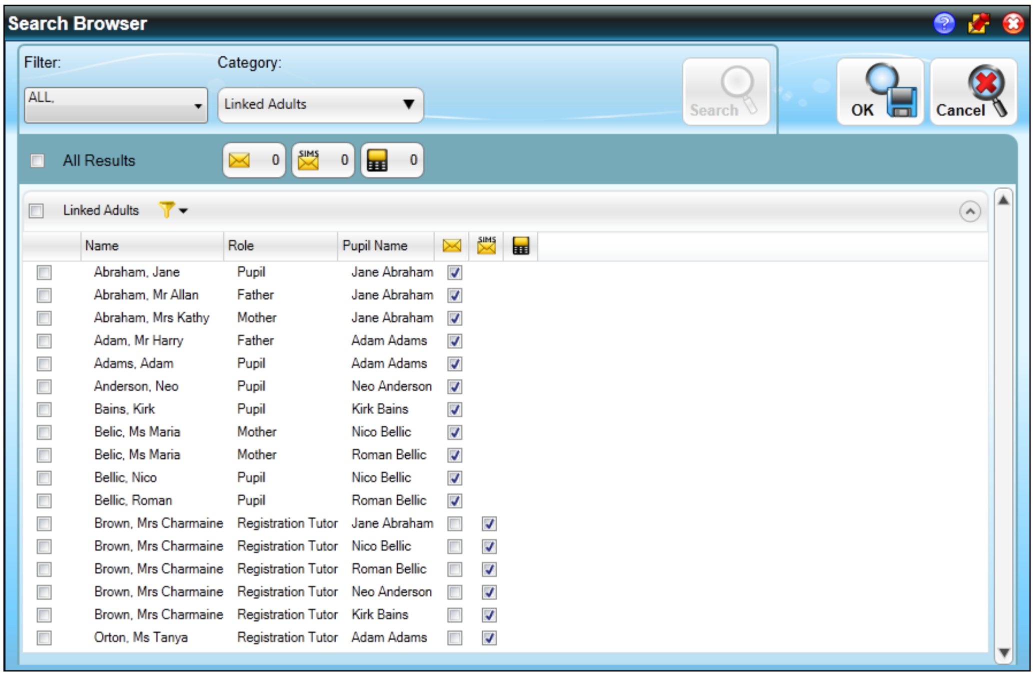
It is also possible to send a Pupil/Student General Message relating to a single pupil/student via the **Links** panel on the pupil/student record (please see *Pupil/Student General Message (Single Pupil/Student)* on page *36*).

1. Select **Focus | Pupil** (or **Student**) **| Send Pupil** (or **Student**) **Message** to display the **Find Pupil** (or **Student**) dialog.

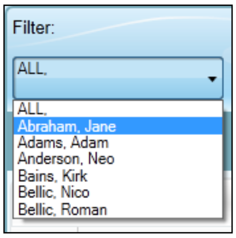


2. Search for and highlight the required pupil/students. Multiple pupil/students can be selected using **Ctrl + click** or **Shift + click**.

3. Click the **OK** button to display the **Search** browser.



4. All linked adults for all of the selected pupil/students are displayed. To filter the list to display the linked adults of a particular pupil/student, select the required pupil/student from the **Filter** drop-down list.



Selecting a pupil/student from the drop-down list displays their name in the **Filter** drop-down list.

5. To facilitate the selection of a group of people in the **Linked Adults** panel, click the **Filter** button to display all of the roles represented in the **Linked Adults** panel.

 *Filter button*

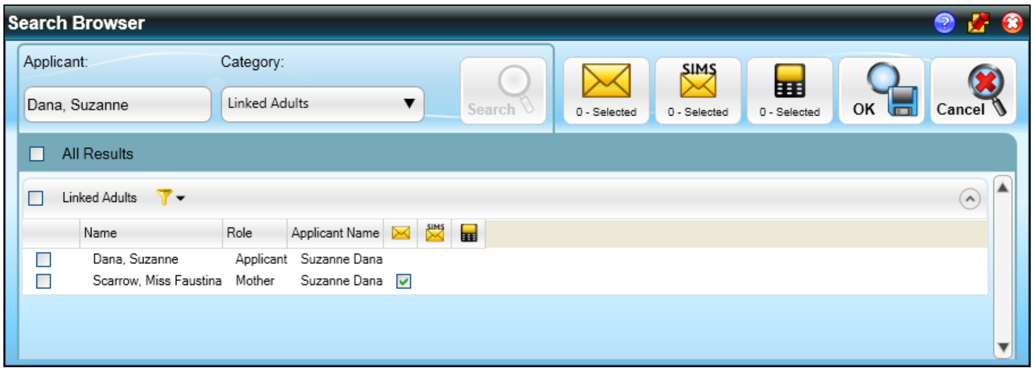
6. Select or deselect the appropriate check box(es), leaving selected only the check box of the role(s) you wish to select from. Deselect the **Select All** check box to deselect all of the check boxes.

   The instructions in the section referenced in the table (below) relate to sending a General Message, but they are relevant for all types of message that can be sent manually (apart from step 1, which is redundant when sending a Pupil/Student General Message).

Applicant General Messages

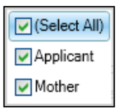
An Applicant Message can be created from a number of areas in SIMS and is therefore linked automatically to the selected pupil/student's record. When selecting the intended recipients, the search criteria **Category** defaults to show all people who are currently associated with the selected pupil/student (**Linked Adults**), including parental contacts, registration tutors and teachers.

1. An Applicant Message can be sent by clicking the **Send Message** hyperlink in the **Links** panel on any of the following pages in SIMS:
   - **Application** page (by clicking the **Application** button on the toolbar or selecting **Focus | Admission | Application**).
   - **Student SEN details** page (via **Focus | Pupil** (or **Student**) **| Special Educational Needs**).
   - **Fees Details** page (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details | Fees Details**).
2. Search for then select the required pupil/student to display their details on the **Application** page, **Student SEN details** page or the **Fees Details** page.
3. In the **Links** panel on the right-hand side of the page, click the **Send Message** hyperlink to display the **Search** browser.



4. To facilitate the selection of a group of people in the **Linked Adults** panel, click the **Filter** button to display all of the roles represented in the **Linked Adults** panel.

Filter button



5. Select or deselect the appropriate check box(es), leaving selected only the check box of the role(s) you wish to select from. Deselect the **Select All** check box to deselect all of the check boxes.

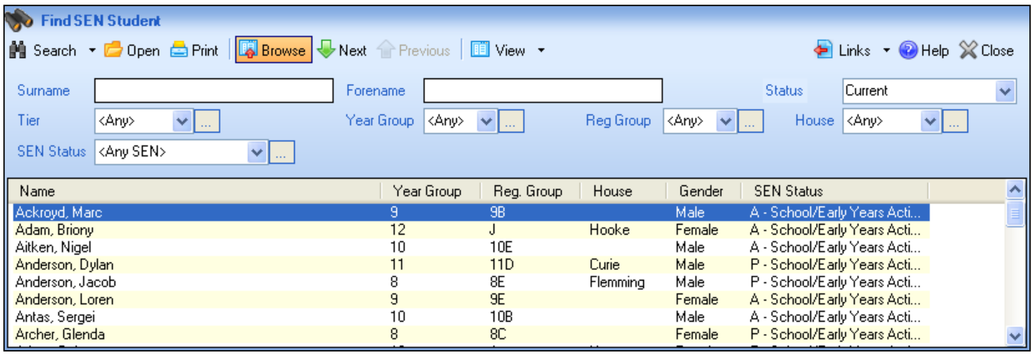
   The instructions in the section referenced in the table (below) relate to sending a General Message, but they are relevant for all types of message that can be sent manually (apart from step 1, which is redundant when sending an Applicant Message).

More Information:
Sending a Pupil/Student Message on page *52*

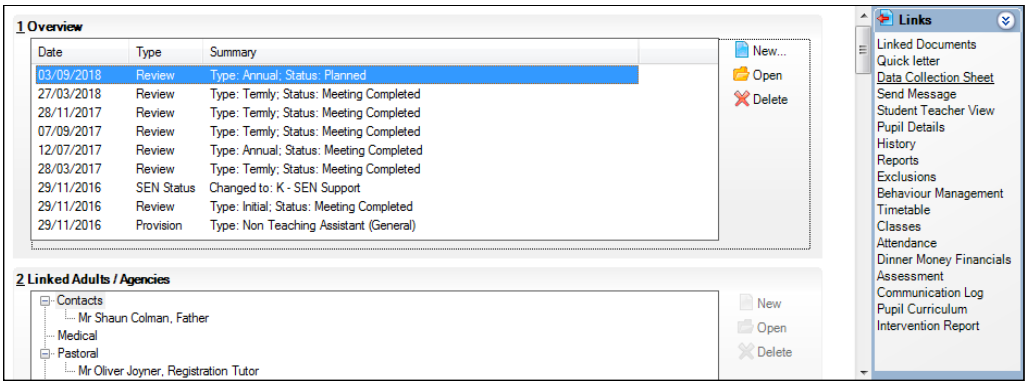
SEN Messages

A SEN Message can be created from the **Pupil** (or **Student**) **SEN Details** page and is therefore linked automatically to the selected SEN pupil/student's record but it is not linked to a specific SEN Event. 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.

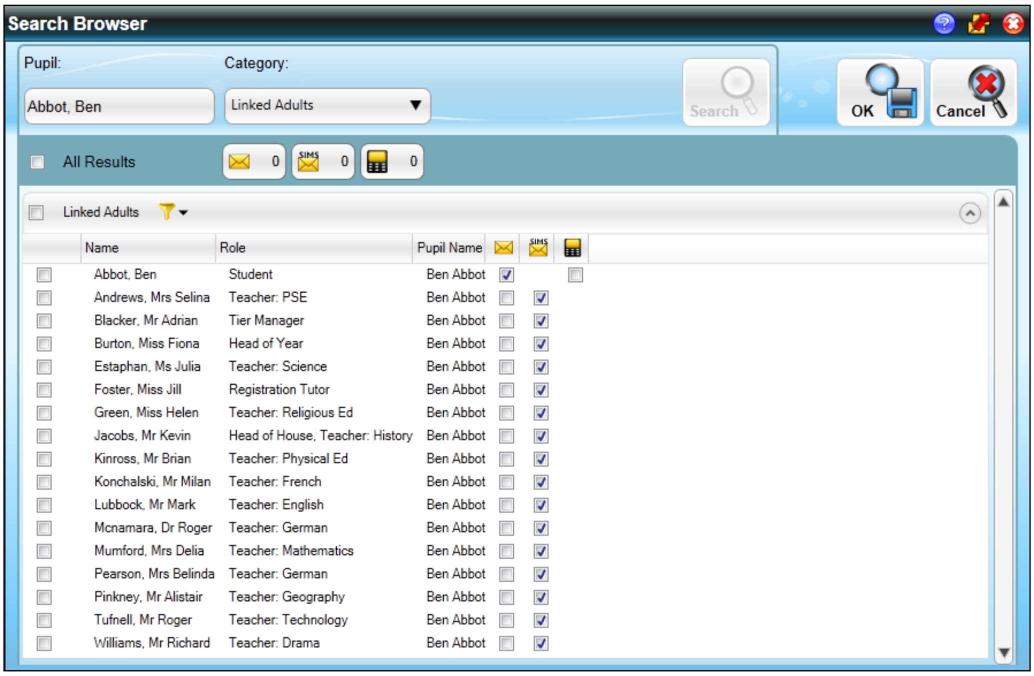
1. Select **Focus | Pupil** (or **Student**) **| Special Educational Needs** to display the **Find SEN Pupil** (or **Student**) browser.



2. Search for then select the required pupil/student to display their details on either the **Pupil** (or **Student**) **SEN details** page.

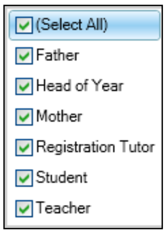


3. In the **Links** panel on the right-hand side of the page, click the **Send Message** hyperlink to display the **Search** browser.



4. To facilitate the selection of a group of people in the **Linked Adults** panel, click the **Filter** button to display all of the roles represented in the **Linked Adults** panel.

Filter button



5. Select or deselect the appropriate check box(es), leaving selected only the check box of the role(s) you wish to select from. Deselect the **Select All** check box to deselect all of the check boxes.

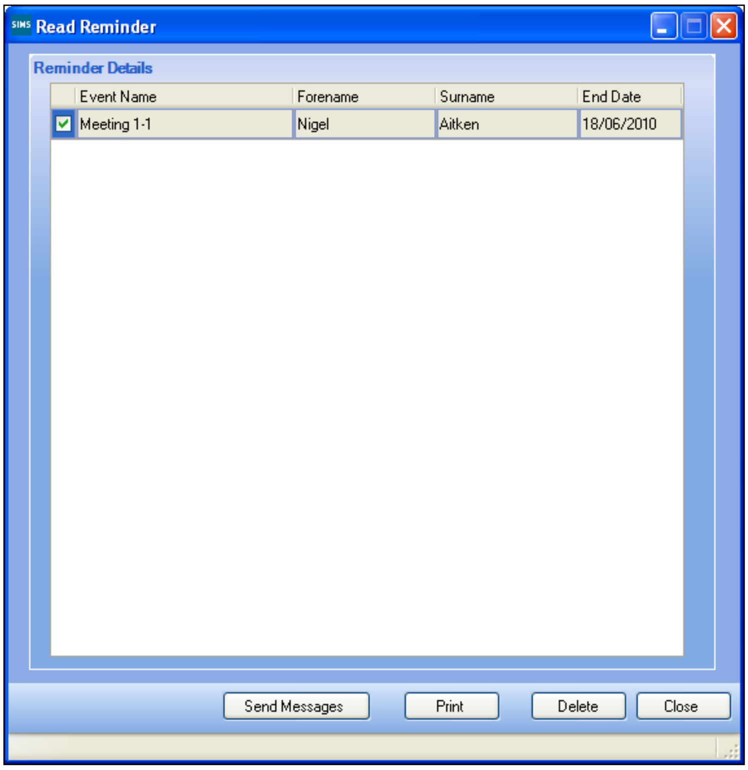
   The instructions in the section referenced in the table (below) relate to sending a General Message, but they are relevant for all types of message that can be sent manually (apart from step 1, which is redundant when sending a SEN Message).

More Information:
Sending a Pupil/Student Message on page *52*

SEN Reminder Messages

A SEN reminder message can be sent to all internal contacts. A message created in this way cannot be sent to external contacts (e.g. parent/guardians, agents, etc.). This functionality can be used only if you have elected to receive reminders/alerts for SEN via **Focus | Alerts | Setup Reminders**.

1. On the SIMS **Home Page**, click a SEN reminder in the **My Reminders** panel to display the **Read Reminder** dialog.
2. Select the check box adjacent to the required event.



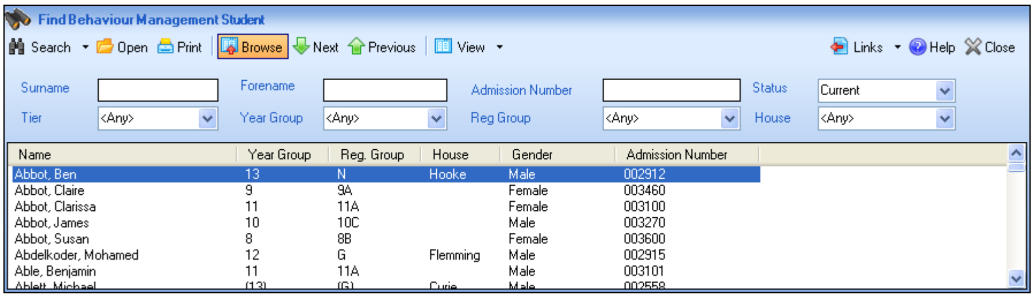
3. Click the **Send Messages** button to display the **Search** browser.

More Information:
Sending a Pupil/Student Message on page *52*

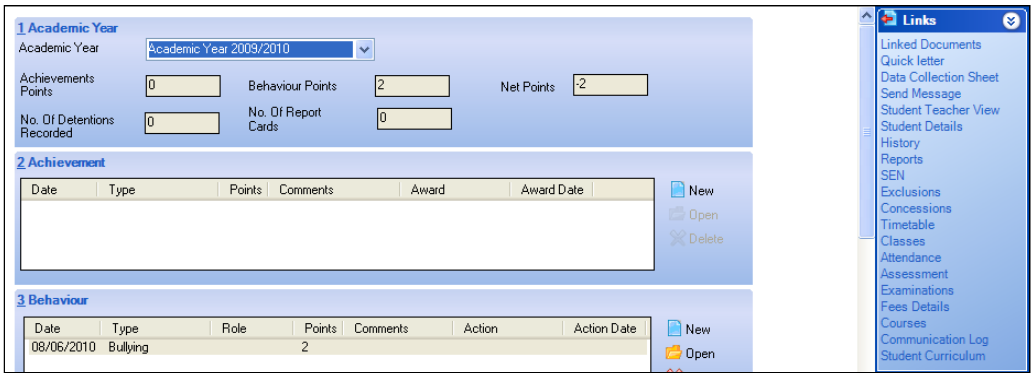
Behaviour Messages

A Behaviour Message can be created from the **Behaviour Management** 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.

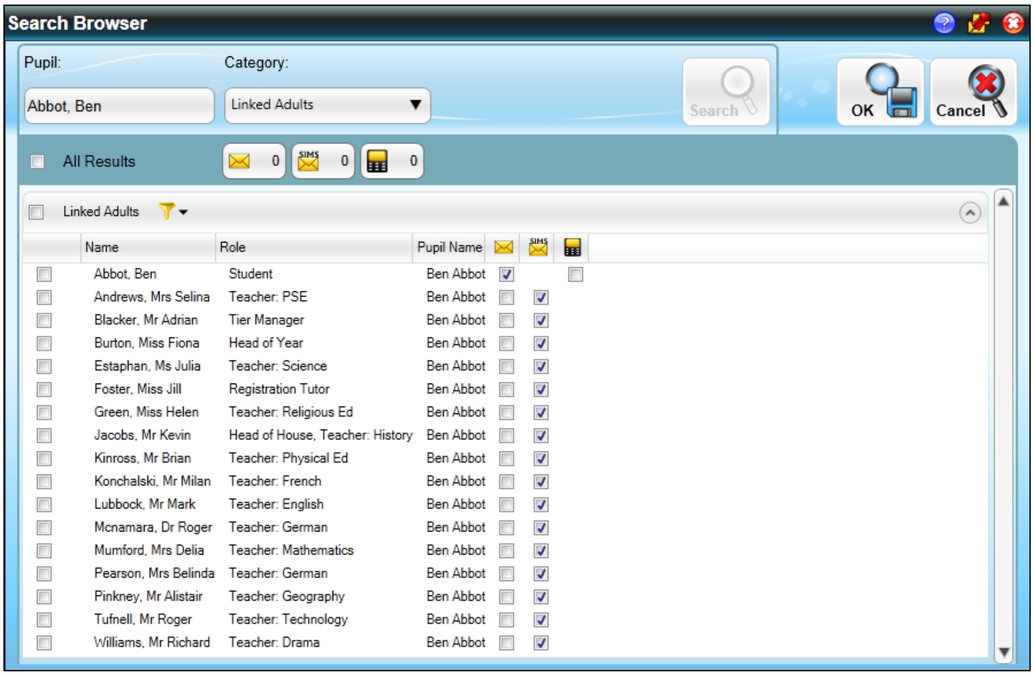
1. Select **Focus | Behaviour Management | Student Behaviour** to display the **Find Behaviour Management Student** browser.



2. Search for then select the required pupil/student to display their details on the **Behaviour Management** page.

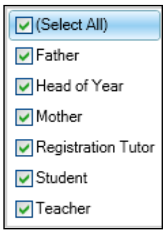


3. In the **Links** panel on the right-hand side of the page, click the **Send Message** hyperlink to display the **Search** browser.



4. To facilitate the selection of a group of people in the **Linked Adults** panel, click the **Filter** button to display all of the roles represented in the **Linked Adults** panel.

Filter button



5. Select or deselect the appropriate check box(es), leaving selected only the check box of the role(s) you wish to select from. Deselect the **Select All** check box to deselect all of the check boxes.

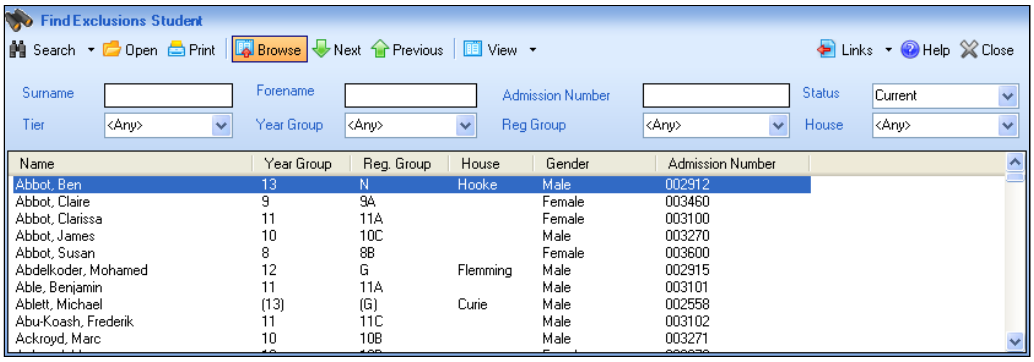
   The instructions in the section referenced in the table (below) relate to sending a General Message, but they are relevant for all types of message that can be sent manually (apart from step 1, which is redundant when sending a Behaviour Message).

More Information:
Sending a Pupil/Student Message on page *52*

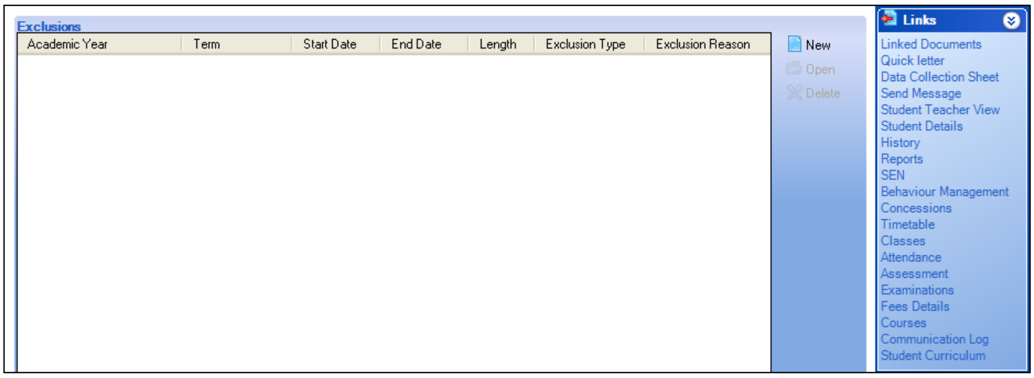
Exclusion Messages

An Exclusion Message can be created from the **Exclusion Details** 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.

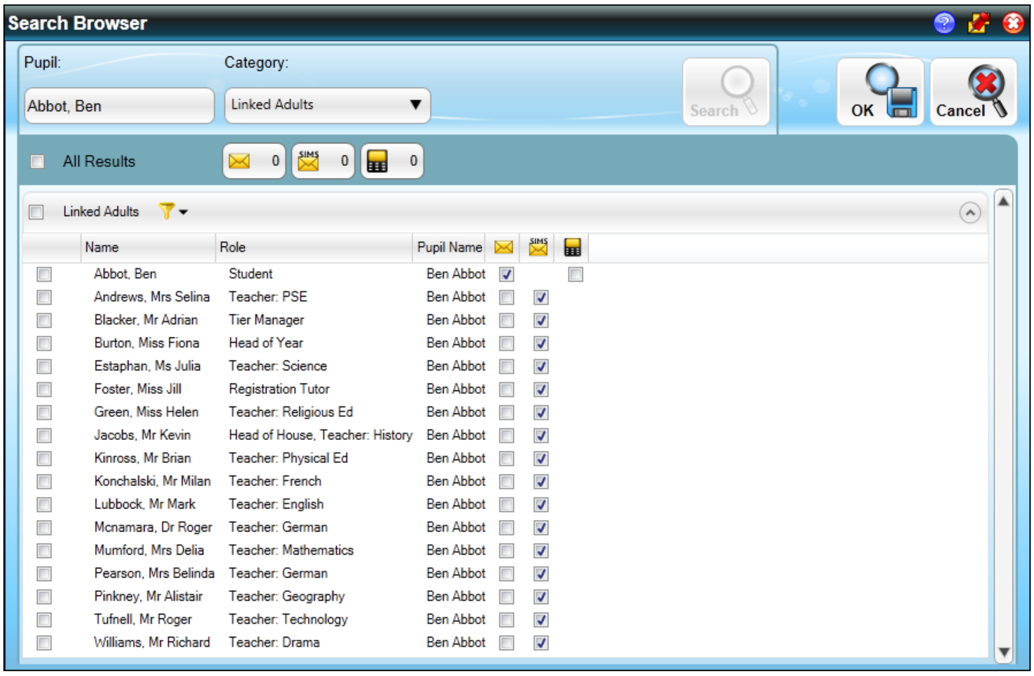
1. Select **Focus | Pupil** (or **Student**) **| Exclusions** to display the **Find Exclusions Student** browser.



2. Search for then select the required pupil/student to display their details on the **Exclusion Details** page.

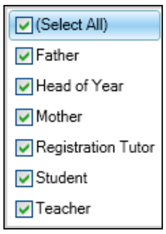


3. In the **Links** panel on the right-hand side of the page, click the **Send Message** hyperlink to display the **Search** browser.



4. To facilitate the selection of a group of people in the **Linked Adults** panel, click the **Filter** button to display all of the roles represented in the **Linked Adults** panel.

Filter button



5. Select or deselect the appropriate check box(es), leaving selected only the check box of the role(s) you wish to select from. Deselect the **Select All** check box to deselect all of the check boxes.

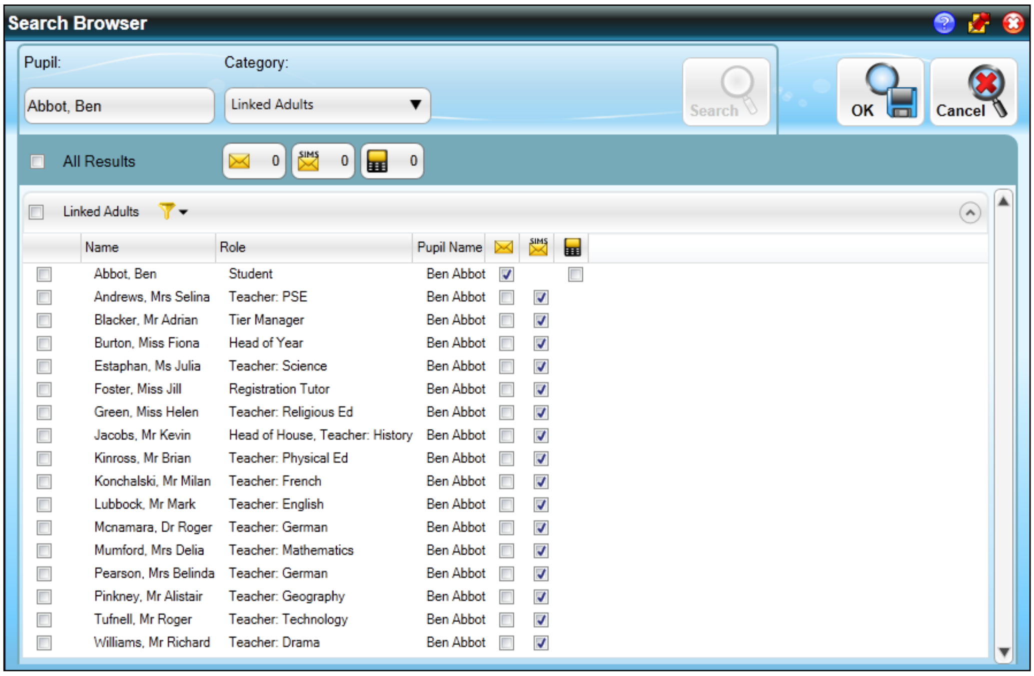
   The instructions in the section referenced in the table (below) relate to sending a General Message, but they are relevant for all types of message that can be sent manually (apart from step 1, which is redundant when sending an Exclusion Message).

More Information:
Sending a Pupil/Student Message on page *52*

Class Register Messages

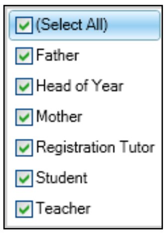
A Class Register Message can be created from the **Take Register** page and is therefore linked automatically to the selected pupil/student's record. When selecting the intended recipients, the search criteria **Category** defaults to show all people who are currently associated with the selected pupil/student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

1. Select **Focus | Attendance** (or **Lesson Monitor**) **| Take Register** to display the **Select Class** browser.
2. Select the required register to display it on the **Take Register** page.
3. Highlight the pupil/student(s) regarding whom you wish to send a message.
4. In the **Links** panel on the right-hand side of the page, click the **Send Message** hyperlink to display the **Search** browser.



5. To facilitate the selection of a group of people in the **Linked Adults** panel, click the **Filter** button to display all of the roles represented in the **Linked Adults** panel.


Filter button



6. Select or deselect the appropriate check box(es), leaving selected only the check box of the role(s) you wish to select from. Deselect the **Select All** check box to deselect all of the check boxes.

   The instructions in the section referenced in the table (below) relate to sending a General Message, but they are relevant for all types of message that can be sent manually (apart from step 1, which is redundant when sending a Class Register Message).

More Information:

Sending a Pupil/Student Message on page *52*

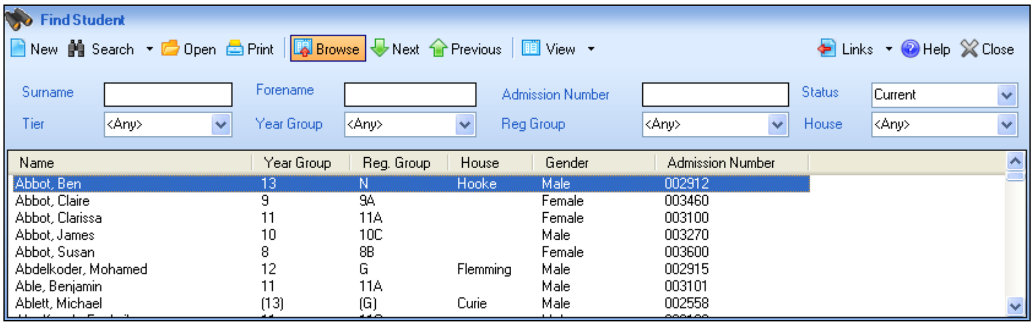
Fees Communication Message

Applicable only if the Fees licence has been applied.

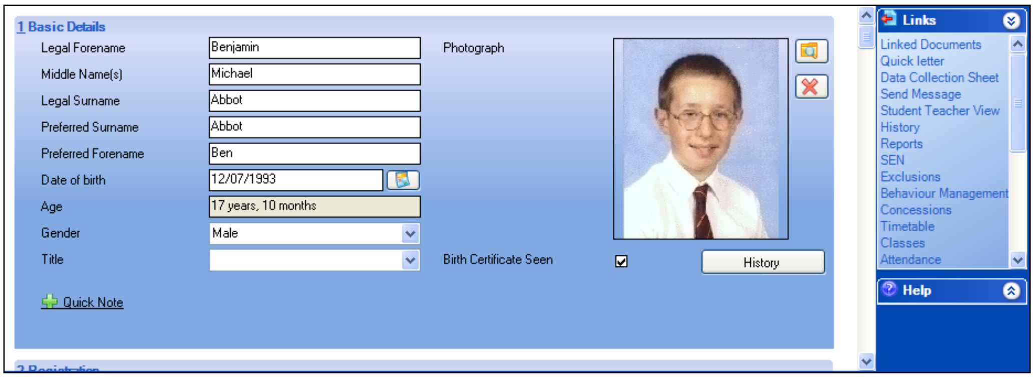
A Fees Communication Message can be sent to all bill payers. When selecting the intended recipients, the search criteria **Category** defaults to show all current **Bill Payers**.

In the case where a bill payer is associated with more than one pupil/student currently attending your school, SIMS InTouch identifies whether a Fees Communication 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.

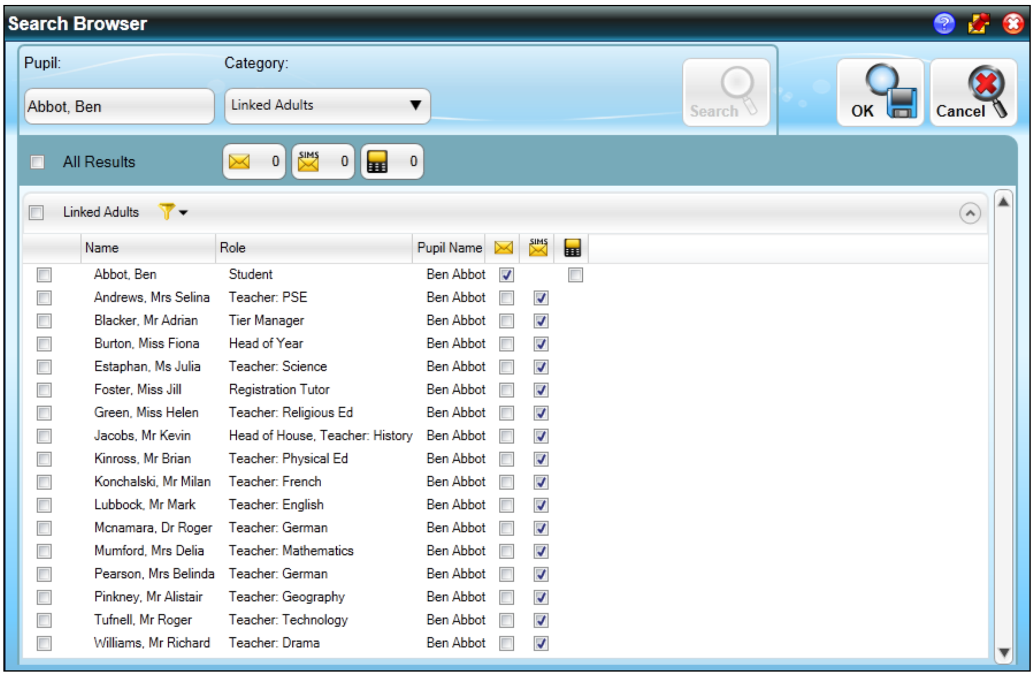
1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser.



2. Search for then select the required pupil/student to display their details on the **Pupil** (or **Student**) **Details** page.

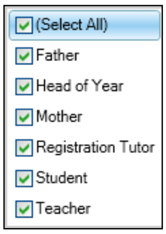


3. In the **Links** panel on the right-hand side of the page, click the **Fees Details** hyperlink to display the **Fees Details** page.
4. In the **Links** panel on the right-hand side of the page, click the **Send Message** hyperlink to display the **Search** browser.



5. To facilitate the selection of a group of people in the **Linked Adults** panel, click the **Filter** button to display all of the roles represented in the **Linked Adults** panel.


Filter button



6. Select or deselect the appropriate check box(es), leaving selected only the check box of the role(s) you wish to select from. Deselect the **Select All** check box to deselect all of the check boxes.

   The instructions in the section referenced in the table (below) relate to sending a General Message, but they are relevant for all types of message that can be sent manually (apart from step 1, which is redundant when sending a Pupil/Student General Message).

More Information:
Sending a Pupil/Student Message on page *52*

Bill Payer Message

Applicable only if the Fees licence has been applied.

A Bill Payer Message can be sent to all bill payers. When selecting the intended recipients, the search criteria **Category** defaults to show all current **Bill Payers**.

In the case where a bill payer is associated with more than one pupil/student currently attending your school, SIMS InTouch identifies whether a Fees Communication 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.

Select **Focus | Fees Billing | Send Message** to display the **Search** browser.

More Information:
Sending a Pupil/Student Message on page *52*

Sending Messages from the Pupil (or Student) Teacher View

Pupil/Student General messages, Detention messages and SEN Reminder messages can be created from the **Pupil** (or **Student**) **Teacher View**.

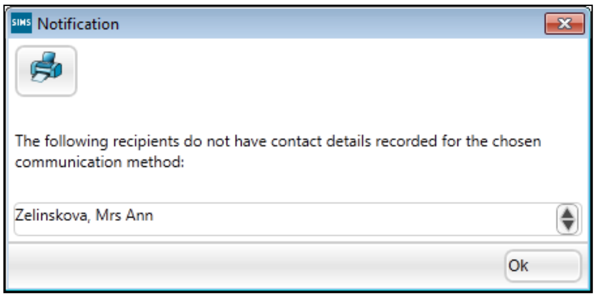
1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Teacher View** to display the **Find Student** browser.

2. Search for then select the required pupil/student to display their details on the **Pupil** (or **Student**) **Teacher View**. The **Timeline** panel displays the pupil/student's activities for the selected period. In the following example, the **Week View** is selected.

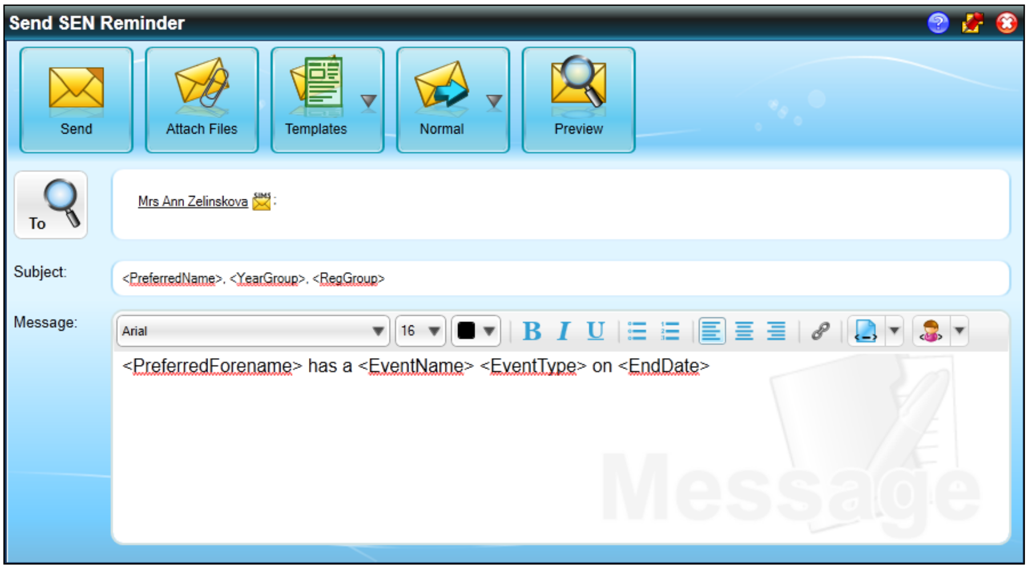
3. Send one of the following types of message:
   - Pupil/Student General message - double-click a lesson or session on the **Timeline** to display the **Send Pupil** (or **Student**) **General Message** page.
   - Detention message - double-click a detention session on the **Timeline** (in the previous graphic, this is the salmon coloured cell at 12pm on Tuesday 18 December) to display the **Send Detention Message** page.
   - SEN Reminder message - double-click a SEN event on the **Timeline** (in the previous graphic, this is the amber coloured cell at 11.15am on Tuesday 18 December) to display the **Send SEN Reminder** page.

   Alternatively, right-click the required item on the **Timeline** then select **Send Message** from the pop-up menu to display the appropriate message page.

   If an intended recipient does not have recorded an entry for the default communication method, the following dialog is displayed.



4. Click the **Print** button to produce a report of these contacts, click the **Ok** button then update their contact record before running this process again. Alternatively, click the **Ok** button and continue to send the messages to contacts who have a primary email address recorded.



When the appropriate message page is displayed, the **To** field is populated automatically with the main supervisor of the session or lesson. In the previous example, Ann Zelinskova is the main SEN co-ordinator. For a lesson or session, the main class teacher is displayed. For a detention session, the main supervisor is displayed. Additional recipients can be selected by clicking the **To** button (please see *Selecting the Recipient(s) of the Message* on page *53*).

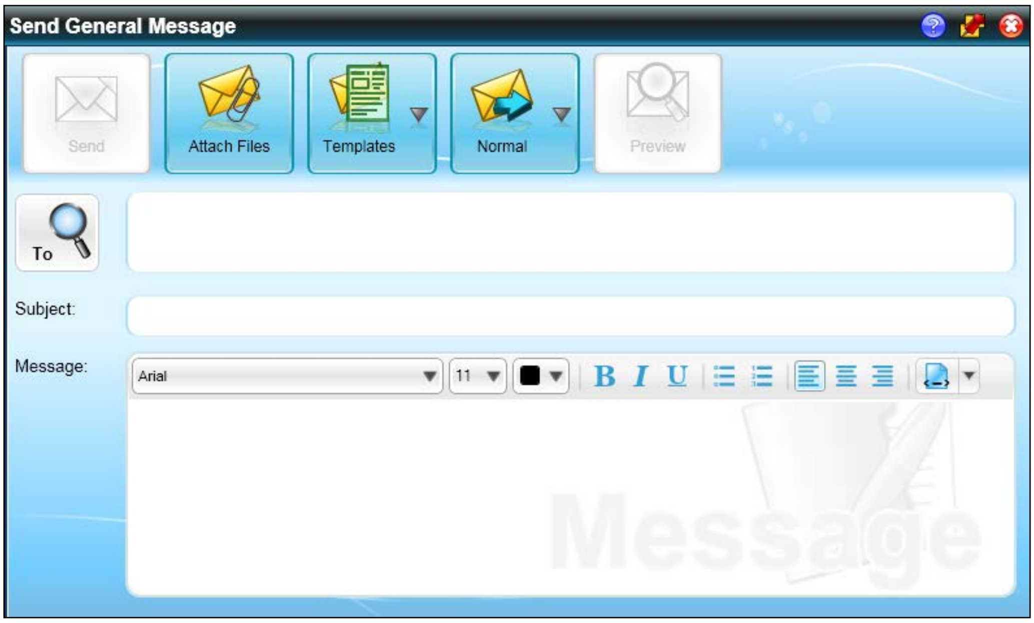
The instructions in the section referenced in the table (below) relate to sending a General Message, but they are relevant for all types of message that can be sent manually (apart from step 1, which is redundant when sending a Pupil/Student General Message).

More Information:
Sending a Pupil/Student Message on page *52*

Sending a Pupil/Student Message

1. Select **Focus | InTouch | Send Message** or click the **Send Message** button on the toolbar to display the **Send General Message** page.

 *Send Message button*

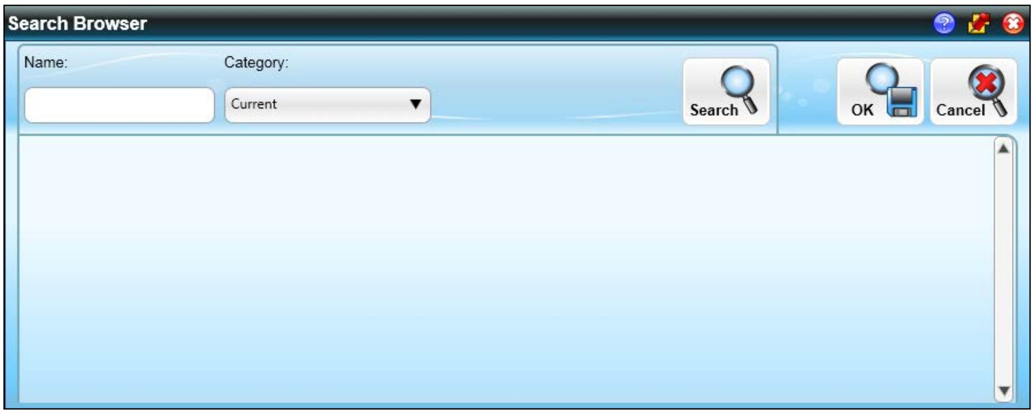


2. Select or enter the required recipient(s) of the message (please see *Selecting the Recipient(s) of the Message* on page *53*).
3. Enter a subject heading (please see *Entering a Subject Heading* on page *62*).
4. Select a template for the message (please see *Selecting a Template for the Message* on page *62*).
5. Enter the body text of the message (please see *Entering the Text of the Message* on page *62*).
6. Format the message text (please see *Formatting Message Text* on page *63*).
7. Add any attachments to the message, if required (please see *Attaching Files to the Message* on page *66*).
8. Set the importance of the message (please see *Setting the Importance of a Message* on page *67*).
9. Preview the message, if required (please see *Previewing a Message* on page *68*).
10. Send the message (please see *Sending the Message* on page *68*).

Selecting the Recipient(s) of the Message

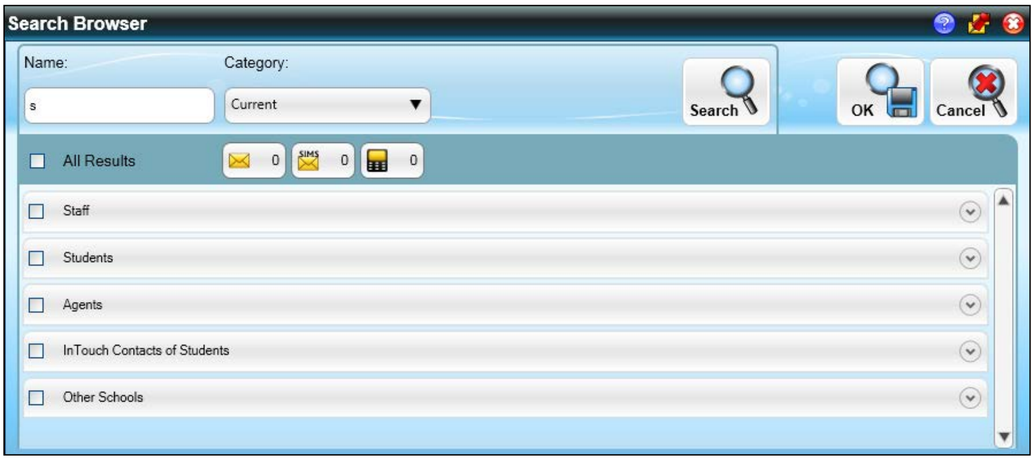
People recorded as being contactable via SIMS internal message, email or mobile can be selected as a message recipient. If a person's contact details are not recorded in SIMS, or if you want to send a message to a person not recorded in SIMS, this can also be achieved by entering a mobile telephone number or email address directly. If no method of communication is selected for a category of person, their name is displayed in the list but they cannot be added as a message recipient.

1. From the appropriate **Send Message** page, click the **To** button to display the **Search** browser.



   This page facilitates the search for the intended recipient(s).

2. The default **Category** of person is set to **Current**. This can be changed by selecting from the drop-down list, e.g. **Staff > Current**, **InTouch Contacts of Students > Current**, etc. Additional functionality is available when sending a message to people in the categories **InTouch Contacts of Students** and **InTouch Contacts of Applicants**. This functionality enables you to select the recipients of a message based on their contact roles.
3. Enter all of part of the intended recipient's **Name** in the adjacent field.
4. Click the **Search** button to search for all the people who match the search criteria entered.

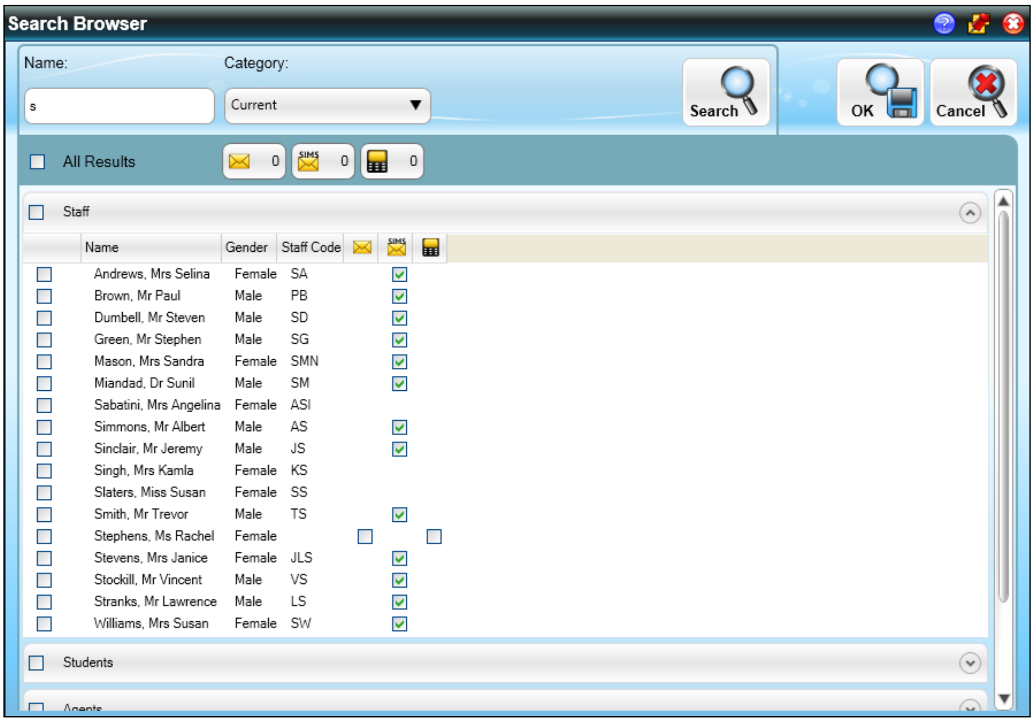


5. The default view displays the category of people found, e.g. **Staff > Current**, **InTouch Contacts of Students > Current**, etc. To expand the view to show the names of the people in each category, click the adjacent arrow button(s).

 *Expand View button*

   To contract the view again, click the down arrow button.

 *Contract View button*



The icons in the column header indicate the method by which each person displayed in the browser can be contacted.

 *Email icon*

 *Internal Message icon*

 *Mobile icon*

> *NOTE: A tick button is displayed adjacent to a person only if they have a mobile phone number or email address recorded, or if they are a SIMS user.*

The default method of communication for each person is indicated by the selection of check boxes in the browser.

6. Select the intended recipient(s) of the message:
   - To select intended recipients individually, select the check box to the left of their name.
   - To select every person within a category (e.g. all **Staff**), select the check box on the left-hand side of the category name.
   - To select every person currently displayed in the browser (e.g. all **Staff**, all **Students** <u>and</u> all **Agents**), select the **All Results** check box directly above the search results.

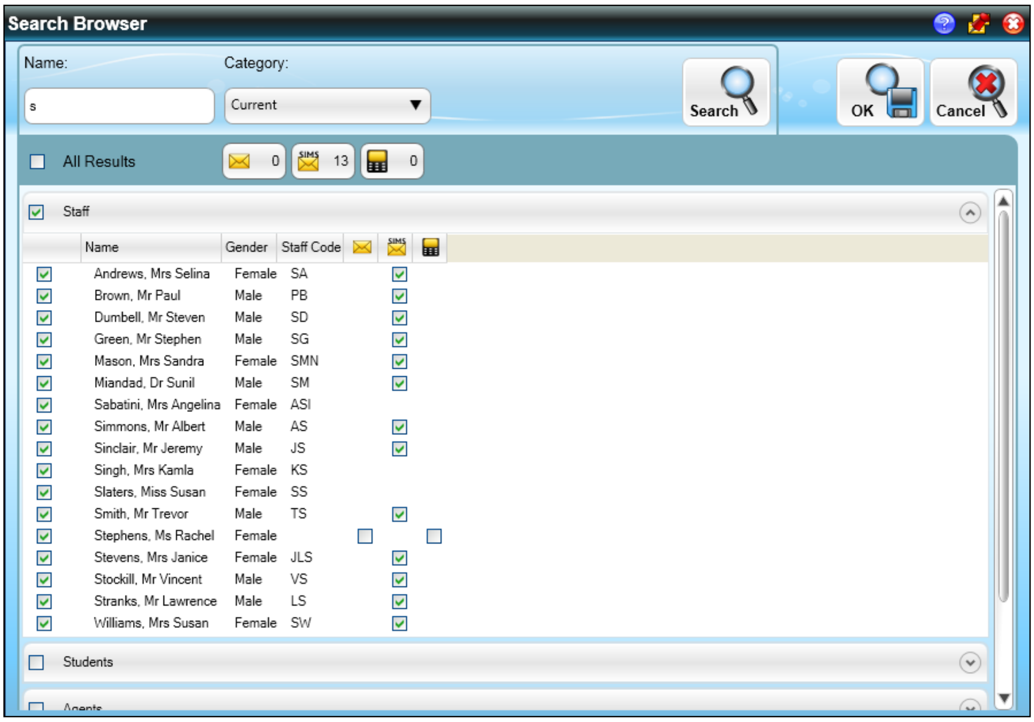
7. Select the method(s) of communication for the selected intended recipients:

> *NOTE: The communication method check box(es) selected by default are the roles defined in the **General** panel on the **InTouch Defaults Setup** page (via **Tools | InTouch | Defaults Setup**).*

- To select the method(s) of communication individually, select the appropriate check box(es) in the column(s) to the far right of the person's name.
- To select every check box of a specific communication method, click the appropriate icon in the column header <u>or</u> click the appropriate icon adjacent to the **All Results** check box.

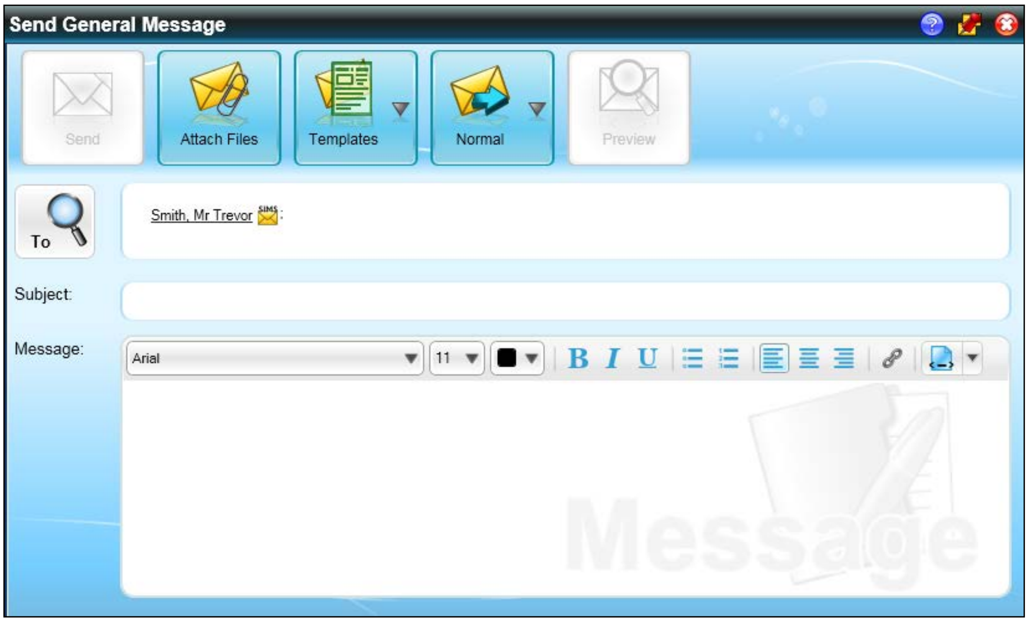
Once a combination of one or more intended recipients and one or more communication methods is selected, the figures displayed in the icons adjacent to the **All Results** check box are updated to display the number of intended recipients that have been selected for each of the communication methods.

Reverse the selections described in steps 6 and 7 to remove the intended recipients and remove the selection of communication methods.



8. Click the **OK** button to confirm the recipients of the message. To cancel the process without selecting any recipients, click the **Cancel** button.
9. The selected recipients are displayed in the **To** field. Additional recipients (details of whom are recorded in SIMS) can be added by clicking the **To** button and repeating the process. Alternatively, enter a mobile telephone number or email address directly in the **To** field for any intended recipient who is not currently recorded in SIMS.

> *NOTE: A recipient added in error can also be removed from any of the* ***Send Message*** *pages by right-clicking their name in the* ***To*** *field then selecting* ***Remove Recipient(s)*** *from the pop-up menu.*



More Information:
Setting Default Communication Methods on page *176*

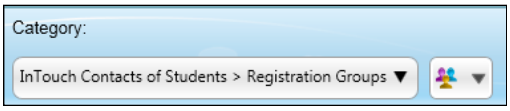
Selecting the Recipient(s) of the Message by Contact Role

The display of people in the browser, and the subsequent automatic selection as a potential intended recipient of a message, is governed by the selection of the following items in the **Relationship Details** panel on the **Contact details** dialog (accessible via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details | Family/Home** panel **| Open** button in the **Contacts** table).

- **Contact Type** drop-down list
- **Parental Responsibility** check box
- **InTouch Communication** check box
- **Court Order** check box (please note that if the **Court Order** check box in the contact record is selected, it will not be possible to contact them via SIMS InTouch)

1. Select the required **Category** from the drop-down list. For example, to search for all contacts of pupil/students in a specific registration group, select **InTouch Contacts of Students | Registration Groups**. To search for all contacts of applicants who have a specific application status, select **InTouch Contacts of Applicants | Statuses**.

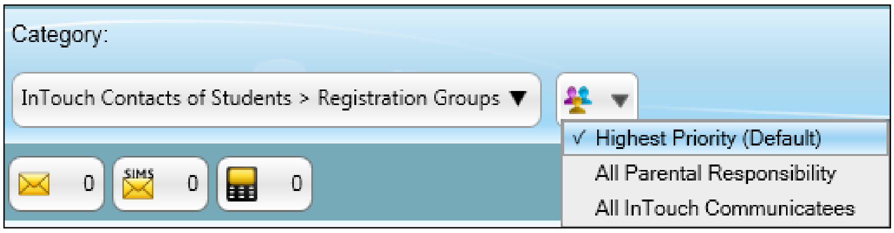
When either an **InTouch Contacts of Students** or **InTouch Contacts of Applicants** option is selected, an additional icon is displayed adjacent to the **Category** drop-down list. The display of this icon indicates that you can select automatically as an intended recipient of a message those contacts who meet specific criteria, based on the contact's recorded relationship with a pupil/student or applicant.



Select the required option from the drop-down list adjacent to this new icon:

- **Highest Priority (Default)**
- **All Parental Responsibility**
- **All InTouch Communicatees**.

> *NOTE: **Highest Priority (Default)** is the default option. If no option is selected manually from the drop-down list adjacent to the icon, this option will be used automatically.*



2. Select **Highest Priority (Default)** to select as a potential intended recipient of the message automatically the pupil/student's or applicant's contact(s) with the highest recorded priority and having parental responsibility. Unless they have been recorded as having a court order against them, <u>any</u> contact recorded as being eligible for InTouch communication can still be selected as a recipient (manually) later in the process. If more than one contact is recorded as having the highest priority, all of them will be selected automatically as being eligible to be an intended recipient.

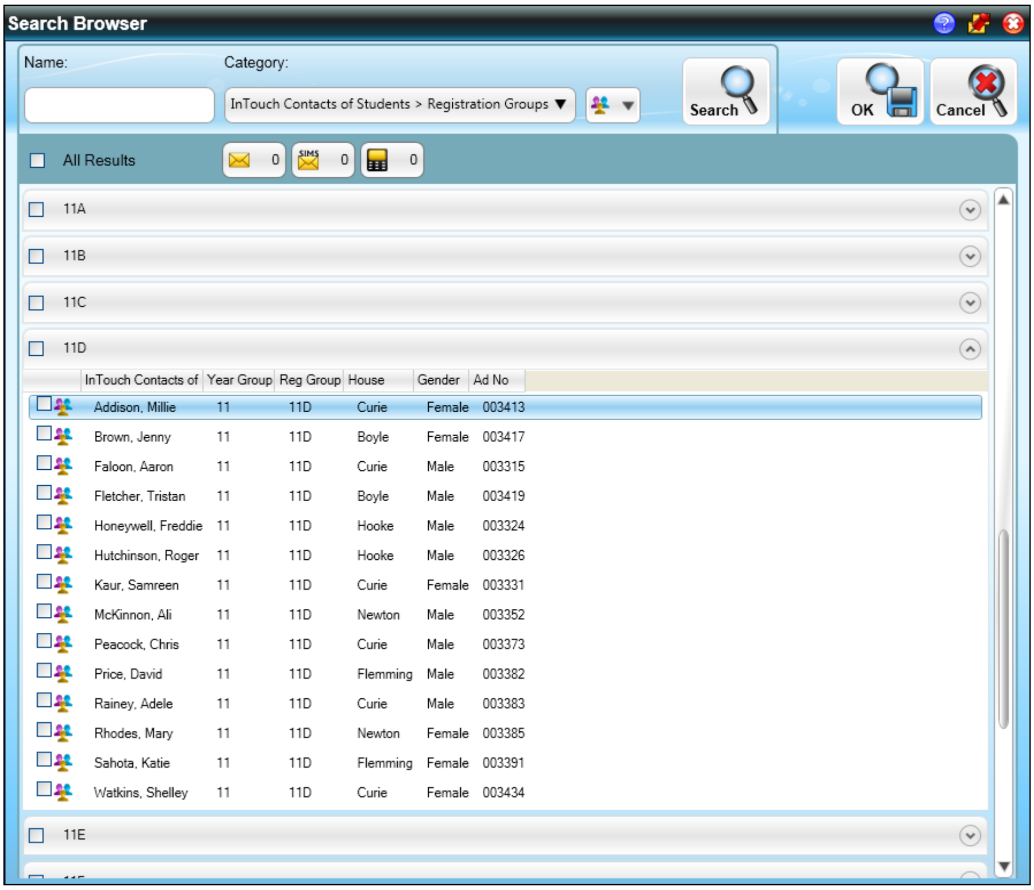
   Select **All Parental Responsibility** to select as a potential intended recipient of the message automatically the pupil/student's or applicant's contact(s) who are recorded as having parental responsibility. Unless they have also been recorded as having a court order against them, <u>any</u> contact recorded as being eligible for InTouch communication can still be selected as a recipient (manually) later in the process, regardless of their contact priority.

   Select **All InTouch Communicatees** to select as a potential intended recipient of the message automatically the pupil/student's or applicant's contact(s) who are recorded as being eligible for communication via InTouch (unless they have also been recorded as having a court order against them), regardless of their contact priority or parental responsibility.

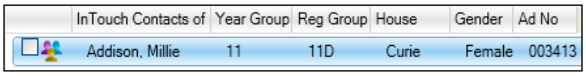
3. Enter all of part of the intended recipient's **Name** in the adjacent field, if required.

4. Click the **Search** button to search for all the people who match the search criteria selected and/or entered.

> *NOTE: The list of potential intended recipients is updated only when you click the **Search** button.*



When you expand a group in the **Search** browser, an icon is displayed adjacent to the check box of each pupil/student's or applicant's name.

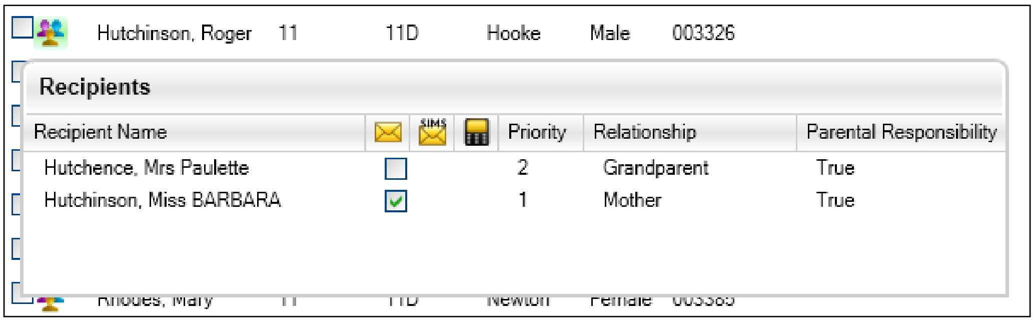


This icon looks similar to the icon discussed in step 1. However when displayed adjacent to an individual pupil/student or applicant, it indicates that one or more associated contacts are available for selection as an intended recipient.

5. Select the intended recipients as described in the previous topic (please see *Selecting the Recipient(s) of the Message* on page *53*), while noting a few significant differences.

   To indicate that you wish to send a message relating to a pupil/student or applicant, select the appropriate check box. However, to indicate which of the contacts you wish to send the message to, you must click the icon adjacent to the check box to display the contact(s) and their communication methods.

 *Contact Selection icon*



The display of information displayed in this window is governed by the aggregate of the following:

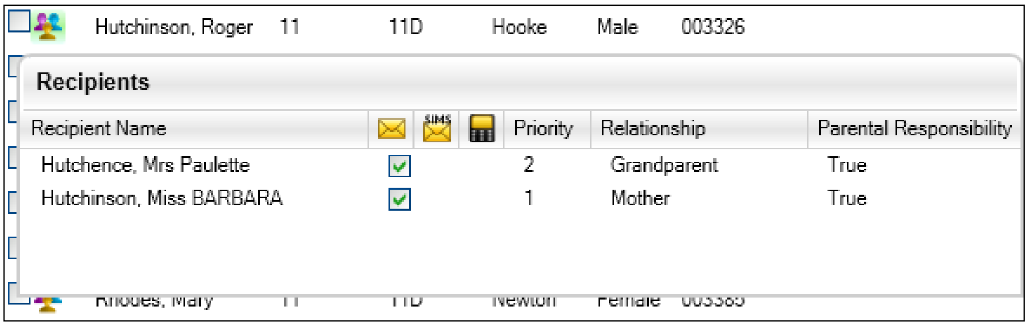
- The default communication method for a contact is governed by the roles defined in the **General** panel on the **InTouch Defaults Setup** page (via **Tools | InTouch | Defaults Setup**).
- The automatic selection of check boxes is governed by the selection made in step 1 (from the icon displayed adjacent to the **Category** drop-down list).

> ***IMPORTANT NOTE:*** *If a parental contact is also a member of staff at your school, the default communication method relates to their role as* ***Parental Contact*** *rather than* ***Staff****, as defined in the* ***General*** *panel on the* ***InTouch Defaults Setup*** *page (via* ***Tools | InTouch | Defaults Setup****).*

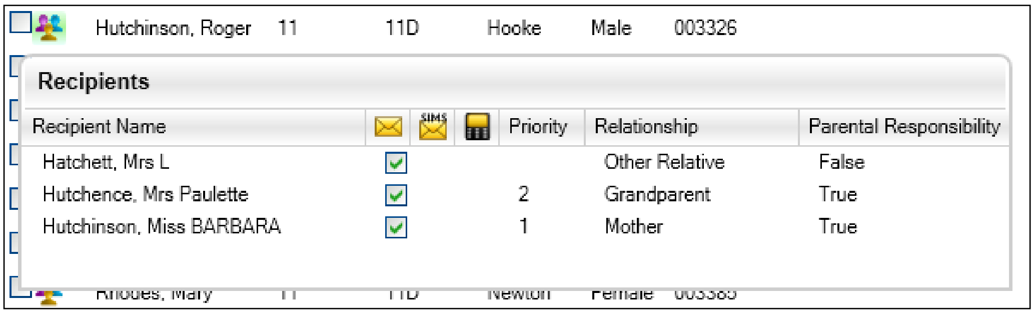
In the previous example, the default communication method for a **Parental Contact** has been set to **Email** and **Highest Priority (Default)** was selected from the icon in step 1. This results in Barbara Hutchinson, the mother of Roger Hutchinson, being selected automatically as a recipient of the message (via email) by virtue of being recorded as the highest priority of all of Roger's contacts. Barbara's contact record also indicates that she has parental responsibility for Roger, that she is eligible for contact via InTouch and that she is not the subject of a court order.

Paulette's contact record indicates that she also has parental responsibility for Roger, is eligible for contact via InTouch and is not the subject of a court order. However, her contact priority is not the highest priority (instead it is set to 2) so although she can still be selected as a recipient of the message manually, she is not selected automatically.

In the following example, the default communication method for a **Parental Contact** has been set to **Email** and **All Parental Responsibility** was selected from the icon in step 1. This results in both Barbara Hutchinson, the mother of Roger Hutchinson, and his grandmother Paulette, being selected automatically as a recipient of the message (via email) by virtue of them both having parental responsibility for Roger, both being eligible for contact via InTouch and neither of them being subject of a court order. Contact priority is not taken into account when this option is selected.



In the following, final example, the default communication method for a **Parental Contact** has been set to **Email** and **All InTouch Communicatees** was selected from the icon in step 1. Mrs Hatchett, Roger's aunt, has recently been added as one of his InTouch communicatees. Mrs Hatchett does not have parental responsibility for Roger, neither has she been assigned with a contact priority. This results in all three of his contacts (Barbara, Paulette and Mrs Hatchett) being selected automatically as a recipient of the message (via email) by virtue of them all being eligible for contact via InTouch and none of them being subject of a court order. Contact priority is not taken into account when this option is selected, neither is parental responsibility.



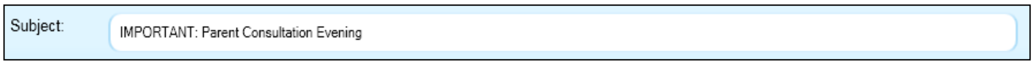
6. The check box(es) relating to the specific contacts you wish to send the message to are selected automatically according to the rules in step 5. The intended recipients can be altered, if required, by selecting additional check boxes or deselecting the check boxes of contacts to whom you do not wish to send the message. In the final example of step 5, although **All InTouch Communicatees** was selected, resulting in the selection of the check boxes for all three contacts, you can deselect a contact's check box, if required.

Once a combination of one or more intended recipients and one or more communication methods is selected, the figures displayed in the icons adjacent to the **All Results** check box are updated to display the number of intended recipients that have been selected for each of the communication methods.

More Information:
Selecting the Recipient(s) of the Message on page *53*
Setting Default Communication Methods on page *176*

Entering a Subject Heading

Enter a **Subject** heading for the message, if required. The text entered should provide the recipient(s) with an indication as to the content of the message. If the template on which the message is based contains default text in the **Subject** line, the text can be edited if required.



IMPORTANT NOTE: *If you enter a **Subject** heading or **Message** text then change the template you wish to associate with the message, any text entered will be replaced with the default text of the newly selected template.*

Selecting a Template for the Message

Templates enable you to alter the look and feel of your messages. A range of templates can be selected to cater for your individual needs. If you have the appropriate permissions, it is possible to create your own templates.

Select the template you wish to apply to the message (if required) by clicking the **Templates** button then selecting the required template from the pop-up menu.

NOTE: The option to select an alternative template is available only if more than one template for this message type has been defined. If only one template exists for a message type, it will be selected by default.

IMPORTANT NOTE: *If you enter a **Subject** heading or **Message** text then change the template you wish to associate with the message, any text entered will be replaced with the default text of the newly selected template.*

More Information:
Setting up Message Templates on page *17*

Entering the Text of the Message

Enter the text of the **Message** in the bottom panel of the **Send Message** page.

*NOTE: At least one character must be entered in the **Message** text before the message can be sent.*

The text entered can be formatted using the toolbar at the top of the **Message** panel.

*TIP: If you make a mistake when entering text, the standard Microsoft® Word undo (**Ctrl + Z**) and redo (**Ctrl + Y**) can be used to make corrections.*

***IMPORTANT NOTE:** If you enter a **Subject** heading or **Message** text then change the template you wish to associate with the message, any text entered will be replaced with the default text of the newly selected template.*

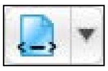
More Information:
Formatting Message Text on page *63*

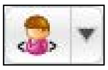
Selecting Data Fields

A range of pupil/student, school, etc. related data can be extracted from the SIMS database and included as part of your message text, including user defined fields.

For example, instead of repeatedly entering your school name in each message, you can insert the `<SchoolName>` tag. When the message is sent, SIMS replaces the tag with the appropriate data stored in the database (e.g. `Green Abbey School`).

The range of data fields available in a message depends on the template used to create the message.


School Data Items button


Pupil/Student Data Items button

Formatting Message Text

A number of formatting options are available, enabling you to change the look and feel of a message.

- Change the font (select the required text then select a font from the drop-down list).
- Change the font size (select the required text then select a font size from the drop-down list).
- Embolden text (select the required text then click the **Bold** button to toggle between normal and emboldened text).


Bold button

- Italicise text (select the required text then click the **Italicise** button to toggle between normal and italicised text).

   *Italicise button*

- Underline text (select the required text then click the **Underline** button to toggle between normal and underlined text).

   *Underline button*

- If the message includes a list, you may wish to convert the list into a bulleted or numbered list. Place the cursor onto the line you wish to add bullets or numbering then click the **Bullet List** button or the **Number List** button.

  Alternatively, apply a bulleted or numbered list to multiple paragraphs of text by selecting the required text then clicking the **Bullet List** or **Number List** button.

   *Bullet List button*

   *Number List button*

  Subsequent bulleted or numbered items can be added by pressing **Enter** at the end of the line to continue the formatting to the next paragraph.

- Text can be left-aligned, centred or right-aligned across the page. Place the cursor onto the appropriate line then click the **Left Align**, **Centre** or **Right Align** button.

  Alternatively, apply the appropriate alignment to multiple paragraphs of text by selecting the required text then clicking the **Bullet List** or **Number List** button.

   *Left Align button*

   *Centre button*

   *Right Align button*

Inserting a Hyperlink into the Message Text

Hyperlinks can be inserted into the message text, particularly useful if you wish to provide a link the school website.

Email addresses and web addresses can be entered directly into the **Message** text. Pressing either the **Spacebar** or **Enter** key after entering either an email address or web address creates a hyperlink automatically.

Hyperlinks can be applied in two other ways and these are described in the following sections.

Applying a Hyperlink to Existing Text

1. Enter the text you wish to use as the hyperlink text.
2. Highlight the entered text, ensuring you do <u>not</u> select any additional trailing spaces or the 'invisible' paragraph (if the required text is at the end of a paragraph).
3. Click the **Hyperlink** button to display the **Insert Hyperlink** dialog then complete the process (please see *Creating a Hyperlink as you Type* on page *65*).

Creating a Hyperlink as you Type

1. Place the cursor where you want the hyperlink to be displayed then click the **Hyperlink** button to display the **Insert Hyperlink** dialog.

> *NOTE: When using this method, the hyperlink text is added via the **Insert Hyperlink** dialog. If you highlight text prior to clicking the **Hyperlink** button, the text will be replaced with the content entered in the **Insert Hyperlink** dialog.*

Hyperlink button

2. Enter the **Text** you wish to display in the message to represent the hyperlink.
3. Enter the **URL** that the text represents.
4. Click the **OK** button to return to the message. The **Text** displayed will be displayed in blue and it will be underlined.

> ***IMPORTANT NOTES:** You must enter `http://`, `\\` or `file://` as part of the **URL**. Failure to enter this text will prevent you from applying the hyperlink to the message.*
> *Careful consideration should be given to the intended recipient of a message containing a hyperlink. For example, if a message is being sent to an external recipient and it contains a UNC path, they may not be able to access this path remotely.*

When a recipient reads a message that includes a hyperlink, clicking the hyperlink displays the website in a web browser.

> *NOTE: If you send an internal message (e.g. a message to another SIMS user) containing a hyperlink, only the detail of the hyperlink is displayed when the message is viewed in SIMS. It is not possible to access the location of the hyperlink by clicking the hyperlink text in an internal message.*

Adding an Image into a Message

Images can be added to an email message. To insert an image, open it in your image editing software and copy the content. Return to your message then select **Edit | Paste** to insert the image.

IMPORTANT NOTES: *It is not possible to send an image via SIMS internal message or mobile message. Although the message will be delivered, the attachment will not.*

The size of a message, including any file attachments or images, must not exceed 4MB.

If an attachment or an image has been added to the message, the current size of the message is displayed above the **Message** panel.

An image can be removed from a message by clicking it then pressing the **Delete** key.

Attaching Files to the Message

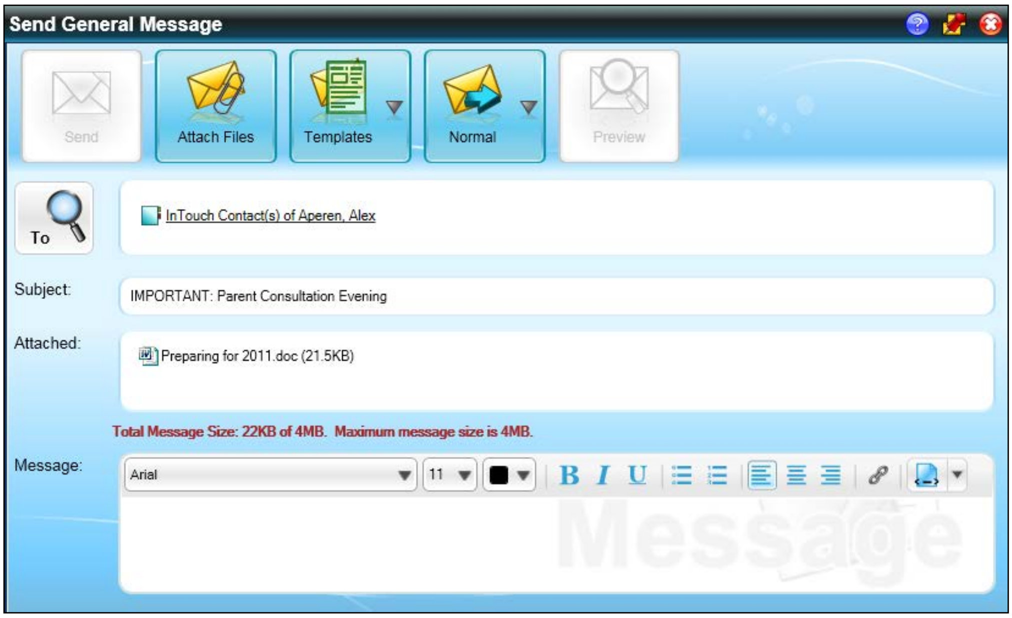
One or more files can be added to an email message and sent to each recipient.

IMPORTANT NOTES: *It is not possible to send an attachment via SIMS internal message or mobile message. Although the message will be delivered, the attachment will not.*

The size of a message, including any file attachments or images, must not exceed 4MB.

1. Click the **Attach Files** button to display the Windows® **Open** dialog.
2. Navigate to the location of the required file.
3. Highlight the file(s) you wish to include as an attachment.
4. Click the **Open** button.

The selected file is displayed in the **Attached** panel, which is located between the **Subject** panel and the **Message** panel. This panel is visible only if an attachment has been added to a message.



If an attachment or an image has been added to the message, the current size of the message is displayed above the **Message** panel.

To remove an attachment added in error, right-click the file then select **Remove attachment** from the pop-up menu.

The attached file(s) are sent to all recipients as part of the message.

Changing the Message Type

Not applicable to Pupil/Student Messages

Regardless of how the messaging functionality was opened, the message type can be edited by selecting the appropriate option from the **Set Type** pop-up menu.

Setting the Importance of a Message

A level of importance can be set for each message. This does not determine the speed at which a message is delivered, but it provides an indication to the recipient(s) as to the importance of the message.

The default importance is **Normal** and this is indicated on the button label.

1. To change the importance of a message, click the **Normal** button then select the appropriate setting from the pop-up menu. The button label changes according to the selection made.

High Importance indicator

Normal Importance indicator

Low Importance indicator

2. To change the importance again, click the same button (named differently to **Normal**, if the importance has already been changed) and repeat the selection process.

Previewing a Message

Applicable to all message types

It is possible to preview a message, perhaps to check that any pupil/student data fields inserted into the message text are displayed correctly.

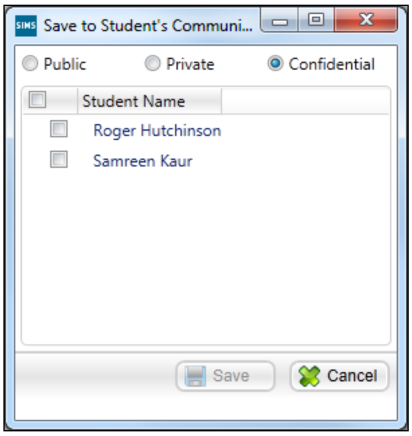
1. Click the **Print Preview** button to display the **Print Preview** page.
2. Use the controls in the top left-hand corner of the page to change the display properties and to print the message, if required.
3. Click the **Close** button to close the window and return to the **Review a Message** page.

Sending the Message

Once the required recipients have been selected, the message text has been entered and formatted and any files have been added as attachments, the message is ready to be sent.

The message can be sent and the message recorded in the communication log, or it can be sent without being recorded in the log. Additionally, you can choose to send the message now or schedule the sending of the message.

To send the message <u>immediately</u> and record it in the communication log, click the **Send & Log** drop-down button, then select **Send Now** from the drop-down list to display the **Save to Student's Communication Log** dialog.

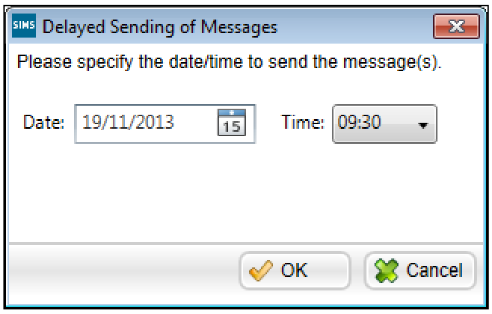


Select the appropriate options (please see *Adding a Message to the Communication Log* on page *76*), then click the **Save** button to send the message. Once the message is sent, the details of the communication are accessible via the **Communication Details** page (**Focus | Communication**).

> *NOTE: The **Communicator** field in the communication log records the name of the member of staff who sent the SIMS InTouch communication. Where the person responsible for the communication is not an employee, the **Communicator** field is left blank.*

To send the message <u>immediately</u> without recording it in the communication log, click the **Send** drop-down button, then select **Send Now** from the drop-down list to send the message to the selected recipients, via the selected communication method(s).

If you wish to delay the sending of a message until a specified date and time, click the **Send & Log** or **Send** drop-down button, then select **Send Later** from the drop-down list to display the **Delayed Sending of Messages** dialog.



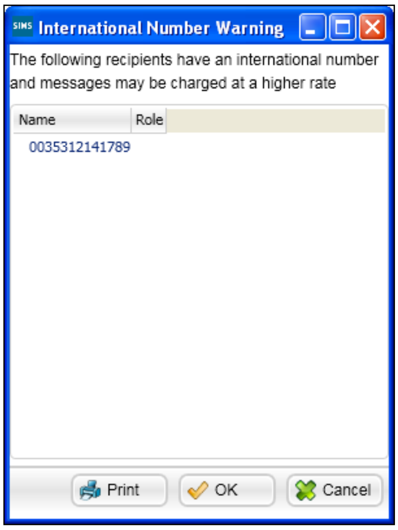
a. Specify the **Date** on which you want to send the message either by entering the required date or by clicking the **Calendar** button, then selecting it.

b. Select the **Time** at which you want to send the message by selecting from the drop-down list.

c. Click the **OK** button to send the message to the queue. The message will be sent at the specified time on the selected date. Alternatively, click the **Cancel** button cancel the scheduling of the message.

d. View your queued messages via the **Queued Messages** panel on the expanded **Messages** widget on the SIMS **Home Page** or by selecting **Focus | InTouch | Show Messages**.

If SIMS detects that a message is being sent to an international mobile telephone number (i.e. it has a different country code to that defined for the school), the **International Number Warning** dialog is displayed.



Click the **Print** button to print this list, if required.

To send the message to all international numbers in the list, click the **OK** button. To cancel the sending of the message to all intended recipients (not only those with an international number), click the **Cancel** button to return to the appropriate **Send Message** page and amend the list of intended recipients (please see *Selecting the Recipient(s) of the Message* on page *53*).

Messages are viewed by the recipients via the **Messages** panel on the SIMS **Home Page** or via **Focus | InTouch | Show Messages**.

More Information:
Viewing Your Messages on page *73*

Sending an Emergency Alert

It may be necessary for a class teacher to request immediate assistance as a result of an emergency in the classroom. The use of emergency alerts in SIMS enables a class teacher to request assistance from anywhere in SIMS, both quickly and efficiently.

Prior to this functionality being available, you must select the members of staff who will be notified immediately in the event of an emergency, together with the preferred method of contacting them (please see *Setting Up the Emergency Alert Notification* on page *173*).

Once the intended recipients of emergency alerts have been selected, they will receive a message via the preferred communication method (SMS message, email message or internal message). Careful consideration should be given to the selection of intended recipients for an emergency alert.

Once opened, the message displays the following predefined text. This text is read-only.

Teacher <Class Teacher Name>, in Room <Class Room Name> with <Class Name>, needs urgent assistance!

The <Class Teacher Name>, <Class Room Name> and <Class Name> tags are populated automatically by SIMS once the emergency alert message is sent. This information is extracted from your SIMS database, preventing the need to enter it manually.

1. Click the **Emergency Alert** button on the main SIMS toolbar, which is available from anywhere in SIMS.

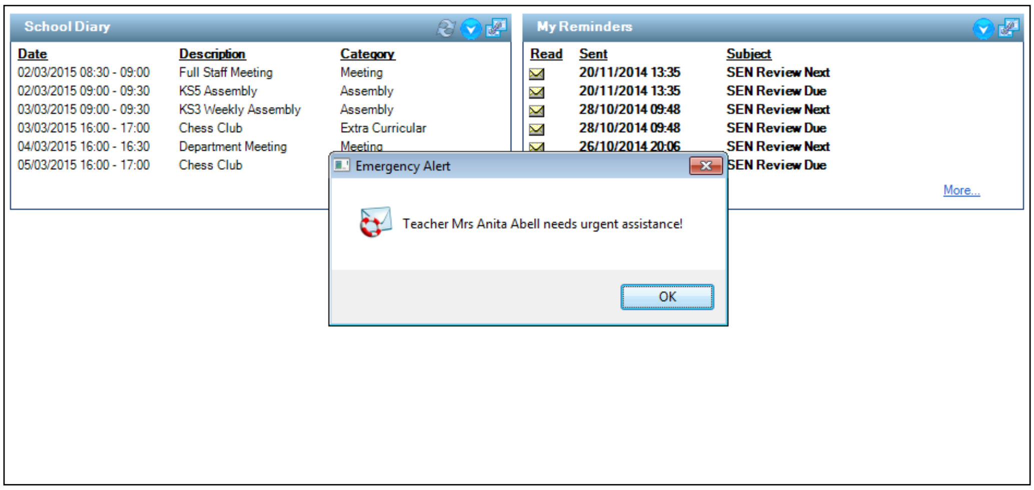
Send Emergency Alert button

A confirmation message is displayed, indicating that the Emergency Alert has been sent.

2. Click the **OK** button to continue.

A message is sent immediately, via the selected communication method(s), to those people that have been selected as a recipient for an Emergency Alert.

When the message is delivered, a pop-up message is displayed on the recipient's screen.



06 | Viewing Your Messages

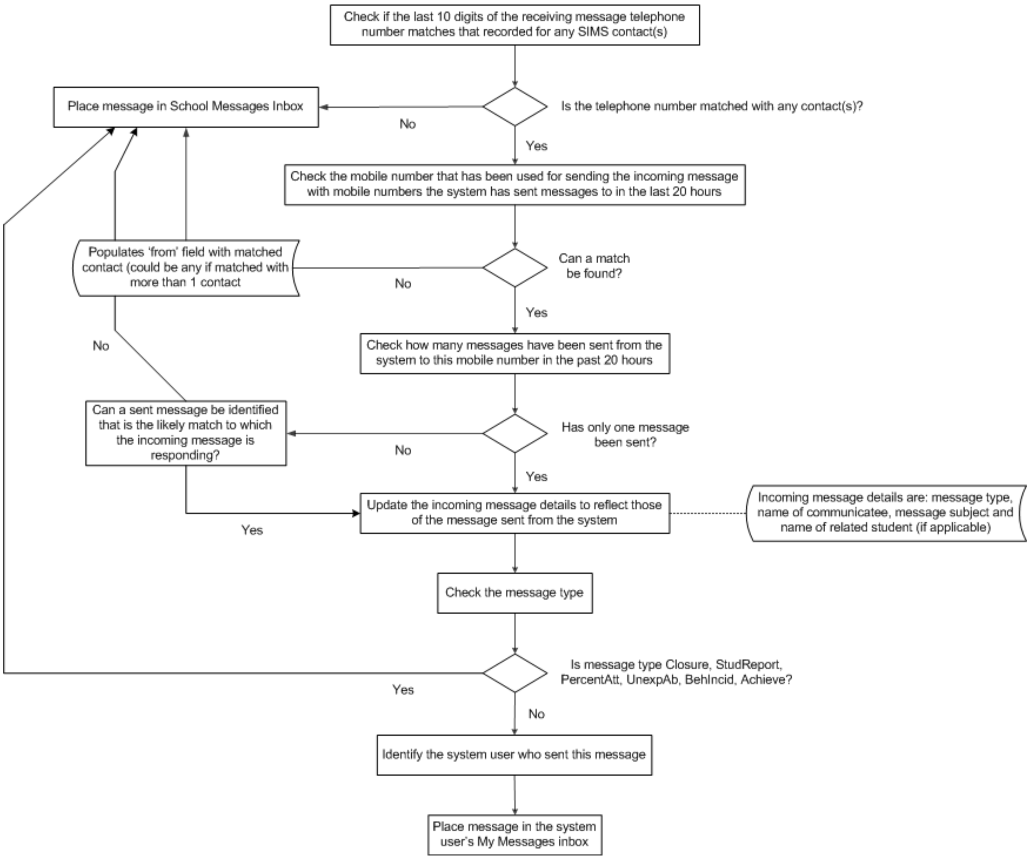
Introduction

Any internal messages sent to you, namely **User** messages, are accessible from the **Messages** widget on the SIMS **Home Page** (**via Focus | Home Page**) or from the **Messages** page (via **Focus | InTouch | Show Messages**). **User** messages can be identified by the user icon next to the message.

Any messages sent to your school from an external source, namely **School** messages, are accessible from the **Messages** widget on the SIMS **Home Page** (via **Focus | Home Page**) or from the **Messages** page (via **Focus | InTouch | Show Messages**). **School** messages can be identified by the school icon next to the message. **School** messages might include messages that cannot be matched to a message sent previously from SIMS, or responses to Unexplained Absences, Student Profiles or Exceptional Circumstances messages.

IMPORTANT NOTE: School *messages are accessible only if you have permissions to see* ***School*** *messages or if the message is a reply to a message that you have sent.*

SIMS can 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. The method of matching messages is demonstrated in the following process flow diagram. To use this functionality, it must first be enabled (please see *Enabling the Matching of an Incoming SMS Message with the Original Message* on page *179*).



Once any message has been opened (via the panels on the SIMS **Home Page** or the menu system), a range of functionality is available that enables you to fully manage the message. All incoming messages can be replied to or forwarded, as required. They can also be printed and deleted.

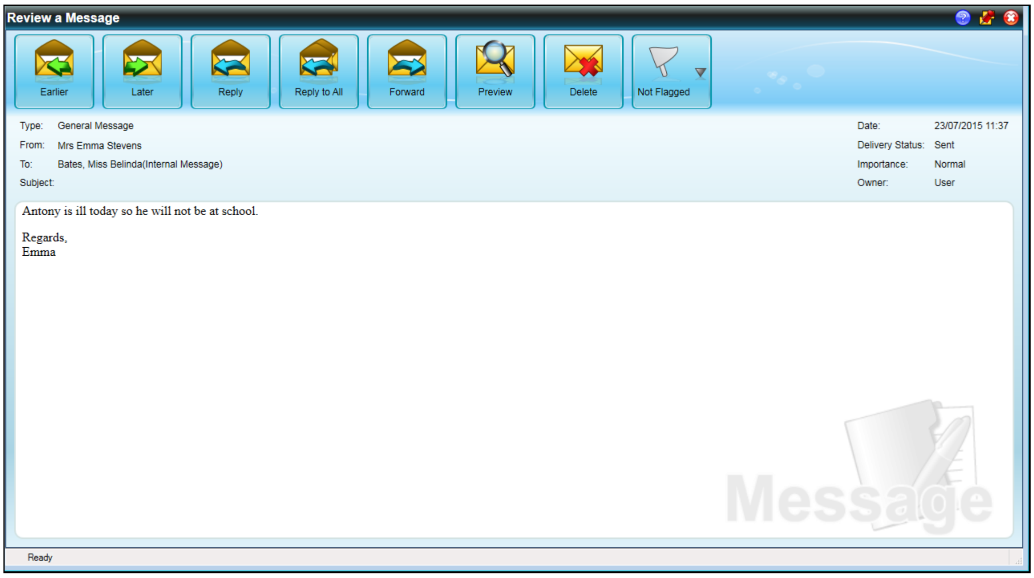
Viewing Received Messages

When a message is displayed, the functionality available depends on the type of message received. For example, a SEN message enables you to create a SEN event from within the message, to add the message to the Communication Log and to view the pupil/student's details via the **Pupil** (or **Student**) **Teacher View** page.

All incoming messages can be replied to or forwarded, as required. They can also be flagged, printed and deleted. The following example demonstrates how a SEN message is viewed.

Unread messages are displayed in bold text in the **Messages** widget on the SIMS **Home Page** and on the **Messages** page (via **Focus | InTouch | Show Messages**).

In the **Messages** panel on the **Home Page** or from **Focus | InTouch | Show Messages**, click the required message to display the **Review a Message** page.



The top part of the screen provides information on the message **Type**, who the message is **From** and who it has been sent **To**, the **Date** on which the message was sent, the **Delivery Status,** the message **Importance** and the **Owner** of the message (i.e. **User** or **School**).

If a message contains a **Subject** line, this is also displayed. If a message contains an attachment, this is displayed beneath the **Subject** line (marked as **Attachment**).

The bottom part of the **Review a Message** page displays the text of the message.

Navigating Between Messages

On the **Review a Message** page, you can navigate between the messages in the inbox.

Click the **Earlier** button to navigate to previous messages and click the **Later** button to navigate to later messages.

> *NOTE: The **Earlier** button is disabled when the earliest message is displayed on the **Review a Message** page. The **Later** button is disabled when the latest message is displayed.*

Viewing Message Attachments

Applicable to all message types

A message can contain one or more attachments. These are indicated by a line labelled **Attachment**, displayed beneath the **Subject** line in the top panel of the page.

> *NOTES: The **Attachments** panel is displayed only if the message contains an attachment.*
>
> *It is not possible to remove an attachment from a received message.*

If a message contains an attachment, click the attachment to open it. Depending on the type of attachment, it may be possible to save it to your hard drive.

Adding a Message to the Communication Log

This adds a record to a pupil/student's communication log, which can be viewed from the **Pupil** (or **Student**) **Details** page (via **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**, then clicking the **Communication Log** hyperlink in the **Links** panel).

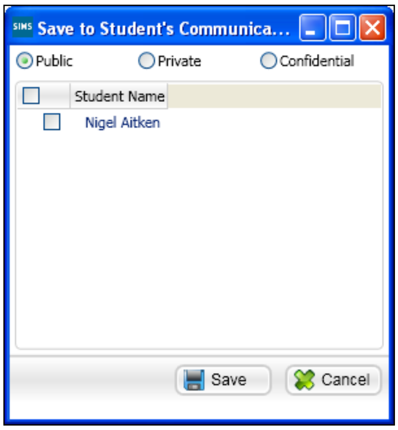
Adding a message to a log keeps a permanent record in SIMS of the information contained in the email, enabling you to maintain a full and complete pupil/student record.

The following message types can be saved to the Communication Log:

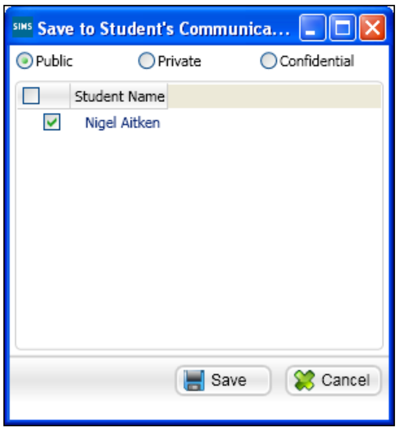
- Achievement Award Message
- Attendance Letter Message
- Behaviour Incident Message
- Behaviour Message
- Dinner Money Letter Message
- Exceptional Circumstance Message
- Exclusion Message
- Fees Communication Message
- Individual Assessment Report Message
- Late Notification Message
- Percentage Attendance Message
- Pupil/Student Detention Message
- Pupil/Student Exam Timetable Message
- Pupil/Student General Message
- Pupil/Student Profile Message
- Pupil/Student Timetable Message
- SEN Message
- SEN Reminder Message
- Unexplained Absence Message.

1. Click the **Add to Log** button to display the **Save to Pupil** (or **Student**)**'s Communication Log** dialog.

> *NOTE: If a message has already been added to the communication log, the* ***Add to Log*** *button will be disabled.*



2. Select the radio button relating to the sensitivity of the information you are saving to the log.
   - **Public** – the content of the log is available to all users with sufficient permissions.
   - **Private** – the content of the log is available only to you.
   - **Confidential** – the content of the log is available to the user who marked the information as confidential originally, together with SIMS users who have the following permissions:
     - Admissions Officer
     - Fees Clerk
     - Fees Manager
     - Receipt Clerk
     - School Administrator
     - SEN Coordinator
     - Senior Management Team
     - System Manager.
3. Select the check box relating to the pupil/student(s) whose communication(s) you wish to save. Alternatively, select the check box in the column header to select all pupil/students in the list.



4. Click the **Save** button to return to the **Review a Message** page.

> *NOTE: The **Communicator** field in the communication log records the name of the member of staff who sent the SIMS InTouch communication. Where the person responsible for the communication is not an employee, the **Communicator** field is left blank.*

Replying to a Message

Applicable to all message types

It is possible to reply to any message that you have received. You can reply to the sender only (**Reply**), or to the sender and all other recipients of the original message (**Reply to All**).

> *NOTES: It is possible to **Reply to All** only for messages sent via the internal messaging system.*
>
> *Attachments are not included when replying to a message.*

1. Click the **Reply** button or the **Reply to All** button to display the **Send General Message** page.

   The **To** field is pre-populated with the sender's name (**Reply**) or all recipients of the original message (**Reply to All**).

   The **Subject** field is prefixed with **Re:** to indicate that this is a message reply. The original body text and message details are displayed beneath the space for the new message text.

2. Enter the required text then click the **Send** button to send the message and return to the **Review a Message** page.

   Many of the features available when sending a message are also available when replying to a message, i.e. formatting of text, adding file attachments, etc.

More Information:

Selecting the Recipient(s) of the Message on page *53*
Entering a Subject Heading on page *62*
Selecting a Template for the Message on page *62*
Entering the Text of the Message on page *62*
Formatting Message Text on page *63*
Attaching Files to the Message on page *66*
Setting the Importance of a Message on page *67*
Previewing a Message on page *68*
Sending the Message on page *68*

Forwarding a Message

Applicable to all message types

It is possible to forward any message that you have received, perhaps for information purposes. Any files attached to the original message are also forwarded.

1. Click the **Forward** button to display the **Send General Message** page.

   The **Subject** field is prefixed with **Fw:** to indicate that this is a forwarded message. The original body text and message details are displayed beneath the space for the new message text.

2. Select the intended recipient(s) of the message by clicking the **To** button and selecting from the **Search** browser or by entering contact details manually.
3. Enter any additional body text, if required, then click the **Send** button to send the message.

   Many of the features available when sending a message are also available when forwarding a message, i.e. formatting of text, adding file attachments, etc.

More Information:

Selecting the Recipient(s) of the Message on page *53*
Entering a Subject Heading on page *62*
Selecting a Template for the Message on page *62*
Entering the Text of the Message on page *62*
Formatting Message Text on page *63*
Attaching Files to the Message on page *66*
Setting the Importance of a Message on page *67*
Previewing a Message on page *68*
Sending the Message on page *68*

Previewing a Message

Applicable to all message types

It is possible to preview a message, perhaps to check that any pupil/student data fields inserted into the message text are displayed correctly.

1. Click the **Print Preview** button to display the **Print Preview** page.
2. Use the controls in the top left-hand corner of the page to change the display properties and to print the message, if required.
3. Click the **Close** button to close the window and return to the **Review a Message** page.

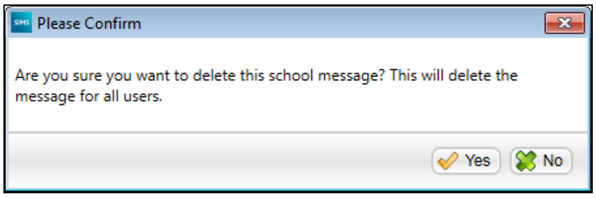
Deleting a Message

Once a message has been actioned or if you no longer wish to retain it, the message can be deleted.

WARNING: *Once a message is deleted, it cannot be retrieved.*

Deleting School Messages

1. Click the **Delete** button.

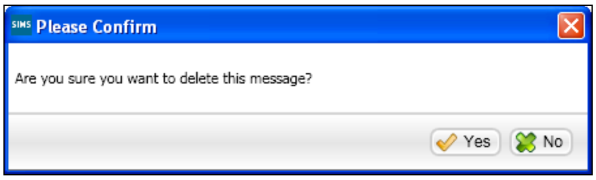


2. Confirm that you wish to delete the message by clicking the **Yes** button or click the **No** button to cancel the deletion.

NOTE: Messages can also be deleted from the ***Messages*** *panel on the SIMS* ***Home Page****.*

Deleting User Messages

1. Click the **Delete** button.



2. Confirm that you wish to delete the message by clicking the **Yes** button or click the **No** button to cancel the deletion.

NOTE: Messages can also be deleted from the ***Messages*** *panel on the SIMS* ***Home Page****.*

Setting the Message Status Flag

Applicable to all message types

You can flag messages so that they can be identified easily if they need to be followed up or if they are important.

Click the **Set Flag Status** button and select **Not Flagged**, **Flagged** or **Completed** from the pop-up menu.

The button image changes according to the option selected: **Not Flagged** (white flag), **Flagged** (red flag) or **Completed** (green tick).

NOTE: Message flags can also be set from the ***Messages*** *panel on the SIMS* ***Home Page*** *screen (please see* Managing your Messages via the SIMS Home Page *on page* 85*) or via* ***Focus | InTouch | Show Messages*** *menu route (please see* Managing your Messages via the Focus Menu *on page* 88*).*

Creating a SEN Event from a Message

Applicable to SEN message type only

When viewing a SEN pupil/student message, you can record a variety of information relating to the associated pupil/student's SEN record. This functionality provides an efficient method of recording SEN information from a related message.

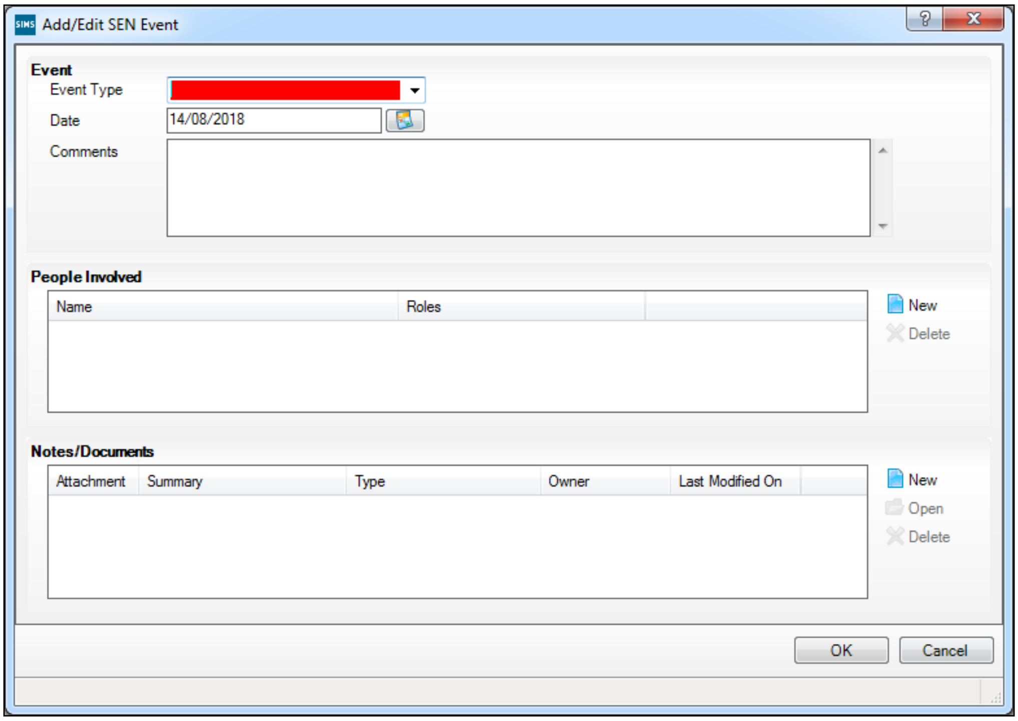
The following information can be recorded in SIMS from a SEN message:

- SEN Event
- SEN Provision
- SEN Review

Recording a SEN Event

An **Event** is any specific and identifiable occurrence that takes place in the course of a pupil/student's history and is associated with their Special Educational Needs.

Click the **Create SEN Event** button then select **SEN Event** from the pop-up menu to display the **Add/Edit SEN Event** dialog.



The **Comments** field in the **Event** panel is populated with the body text of the message.

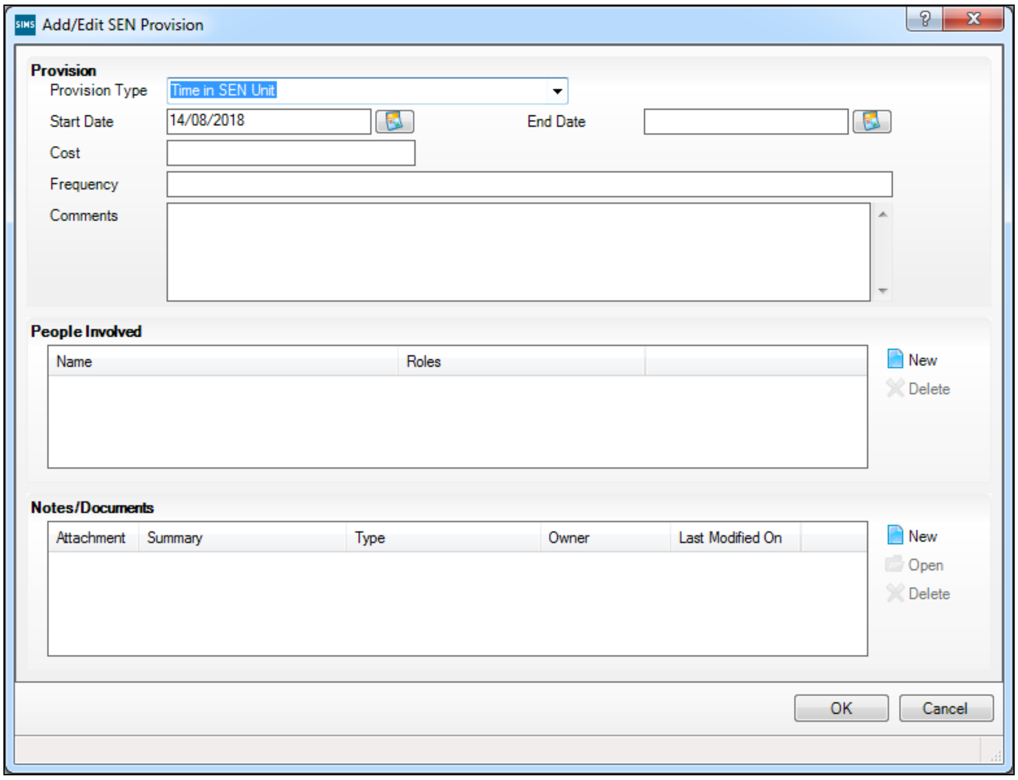
Additional Resources:

Step 4 onwards of *Adding/Editing Events* in the *Managing Pupil/Students with Special Educational Needs* chapter of the *Special Educational Needs* handbook

Recording a SEN Provision

The term Provisions covers a wide range of resources from financial help through to special equipment or the professional services of an Educational Psychologist. Schools must record details of all provisions that have been made for each pupil/student. Not only must the type of provision be identified, its use must be described in terms of frequency. Provisions are linked directly to a pupil/student's review and represent the decisions taken at the review and an historical record is maintained.

Click the **Create SEN Event** button then select **SEN Provision** from the pop-up menu to display the **Add/Edit SEN Provision** dialog.



The **Comments** field in the **Provision** panel is populated with the body text of the message.

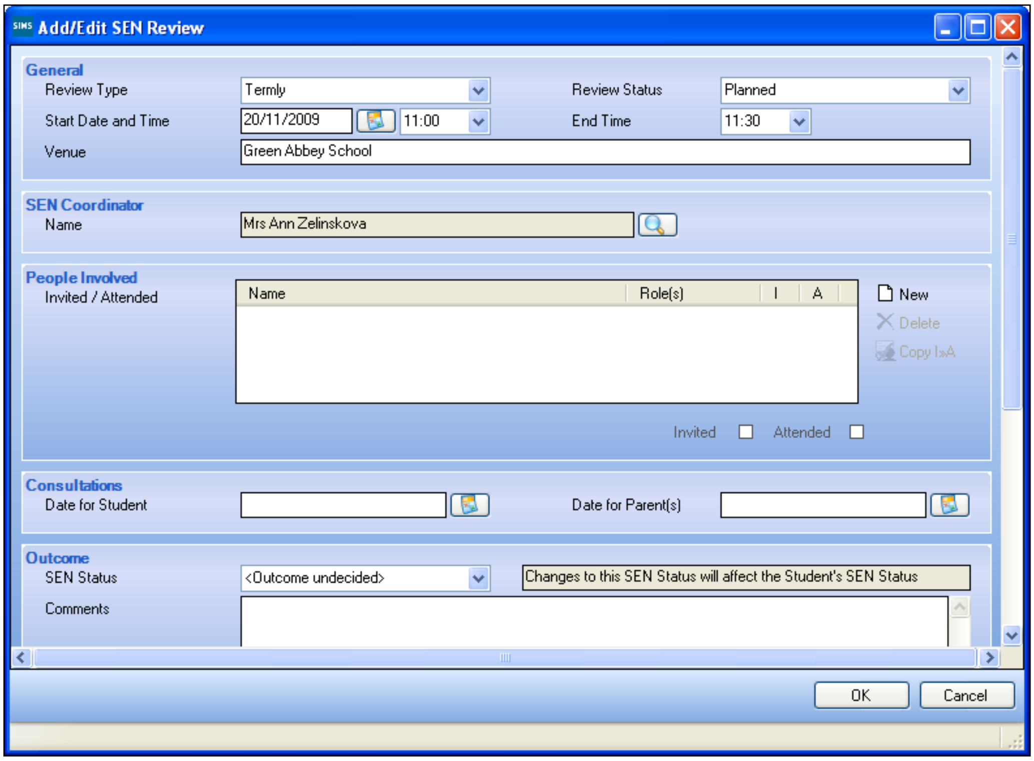
Additional Resources:

Step 4 onwards of *Adding/Editing a Provision* in the *Managing Pupil/Students with Statements and IEPs* chapter of the *Special Educational Needs* handbook

Recording a SEN Review

Reviews are the key element to the entire Special Educational Needs process and without them occurring, it would be very difficult to formalise the special needs of a pupil/student.

Click the **Create SEN Event** button then select **SEN Review** from the pop-up menu to display the **Add/Edit SEN Review** dialog.



The **Comments** field in the **Outcome** panel is populated with the body text of the message.

Additional Resources:

Step 4 onwards of *Adding/Editing a Review* in the *Managing Pupil/Students with Special Educational Needs* chapter of the *Special Educational Needs* handbook

Viewing SEN Pupil/Student Information on the Pupil (or Student) Teacher View

Applicable to SEN message type only

It is possible to access a SEN pupil/student's information directly from a SEN message. Click the **Pupil** (or **Student**) **Details** button to display their **Pupil** (or **Student**) **Teacher View** page.

The **Pupil** (or **Student**) **Teacher View** page enables applicable staff members to quickly view a summary of information relating to any pupil/students.

It displays various types of read-only information relating to the selected pupil/student for the current academic year, linking to more information if required. The information displayed includes:

- Basic Details
- Emergency Contacts
- Key Indicators
- Quick Note
- Timetable (Secondary schools only)
- Attendance
- Behaviour
- Achievements
- Assessment
- SEN Needs
- Classes.

Additional Resources:

Using the Pupil/Student Teacher View chapter of the *Managing Pupil/Students* handbook

Managing Your Messages

Any messages sent to you, namely **User** messages, are accessible from the **Messages** panel on the SIMS **Home Page** (via **Focus | Home Page**) or via **Focus | InTouch | Show Messages**.

Any messages sent to your school from an external source, namely **School** messages, are accessible from the **Messages** panel on the SIMS **Home Page** or via **Focus | InTouch | Show Messages**.

> ***IMPORTANT NOTE: School*** *messages are accessible only if you have permissions to see* ***School*** *messages or if the message is a reply to a message that you have sent.*

Managing your Messages via the SIMS Home Page

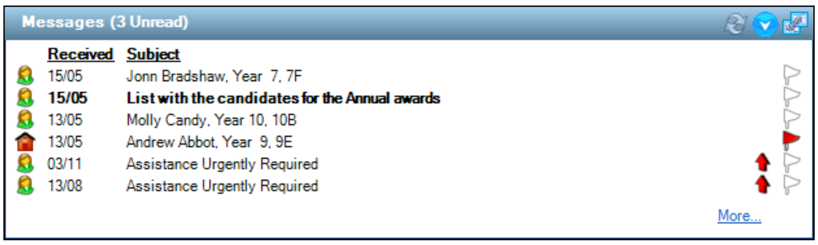
If it is not already open, select **Focus | Home Page** to display the SIMS **Home Page**.

Any messages sent to you (i.e. **User** messages) or to your school from an external source (i.e. **School** messages) are accessible from the **Messages** panel. The user or school icons next to messages indicate **User** or **School** messages respectively.

> ***IMPORTANT NOTE: School*** *messages are accessible only if you have permissions to see* ***School*** *messages or if the message is a reply to a message that you have sent.*

 *User icon*

 *School icon*



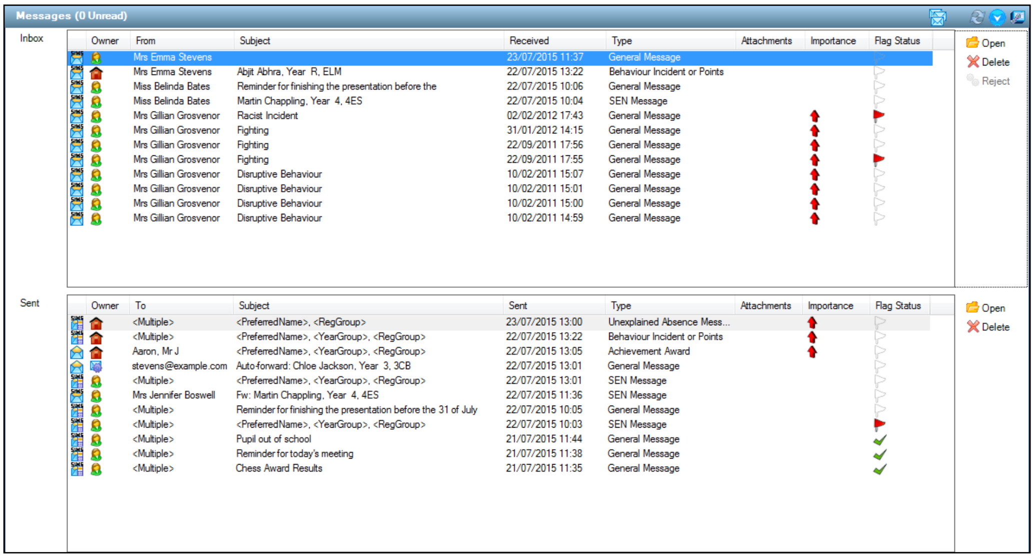
Adjacent to the **Messages** panel title, the **Unread** count applies to the whole mailbox.

To check for new messages, click the **Click to refresh data** button on the top right-hand side of the **Messages** panel. The most recent messages are displayed at the top of the panel.

In the minimised **Messages** panel, the importance indicator of a message can be viewed.

Importance indicator icon

If the number of messages in your inbox exceeds the amount of space available in either of these panels, all recorded messages can be viewed by clicking the **More** hyperlink or by clicking the **Expand** button. In full screen mode, all messages that you have sent can also be viewed. When the panel is displayed in full screen mode, it is removed from the SIMS **Home Page** display.



The **Inbox** and **Sent** tables display received and sent messages. Up to 20 messages are displayed in the **Inbox** and the **Sent** panels. If the **Inbox** or **Sent** panels contain more than 20 messages, the **Show more messages** button is displayed at the top right-hand side of the **Messages** header.

Show more messages button

Click the **Show more messages** button to display the full **Messages** page, otherwise accessible via **Focus | InTouch | Show Messages**.

The **Owner** of the message (i.e. **User** or **School**), the **Subject**, date and time of the message (**Received**), message **Type**, indication of any **Attachments** and the **Importance** are displayed. Additionally, received messages display the sender (**From**) and sent messages display the recipient (**To**).

In the **Inbox** panel, auto-forwarded **User** or **School** messages can be identified by the blue arrow that is incorporated into the **User** and **School** icons.

*Auto-forwarded **User** message icon*

*Auto-forwarded **School** message icon*

In the **Inbox** and **Sent** tables and under the **Flag Status** header, you can define any type of message as flagged or completed.

1. Click the required message.
2. Click the associated white flag (**Not Flagged** status) to define the message as flagged or completed.

 Not Flagged *status (default status)*

 ***Flagged*** *status*

 ***Completed*** *status*

> *NOTE: Message flags can also be set from the restored view of the* ***Messages*** *panel and via* ***Focus | InTouch | Show Messages*** *menu route (please see* Managing your Messages via the Focus Menu *on page* 88*).*

Click the toggle **Flag Status** header to change the sort order of your received or sent messages by flagged status. The messages are sorted in a **Not Flagged**, **Flagged**, **Completed** order or in a **Completed**, **Flagged**, **Not Flagged** order.

From the minimised view of the **Messages** panel on the SIMS **Home Page**, click a message to display it. From the expanded view of the panel, double-click the required message to display it or highlight a message then click the **Open** button.

A message can be deleted from the expanded view by highlighting the required one then clicking the **Delete** button. Alternatively, use **Shift + click** or **Ctrl + click** to select a block of messages or selective messages respectively prior to deletion.

> ***IMPORTANT NOTE:*** *When you delete a* ***School*** *message, then this will be deleted for all SIMS users (please see* Deleting School Messages *on page* 80*).*

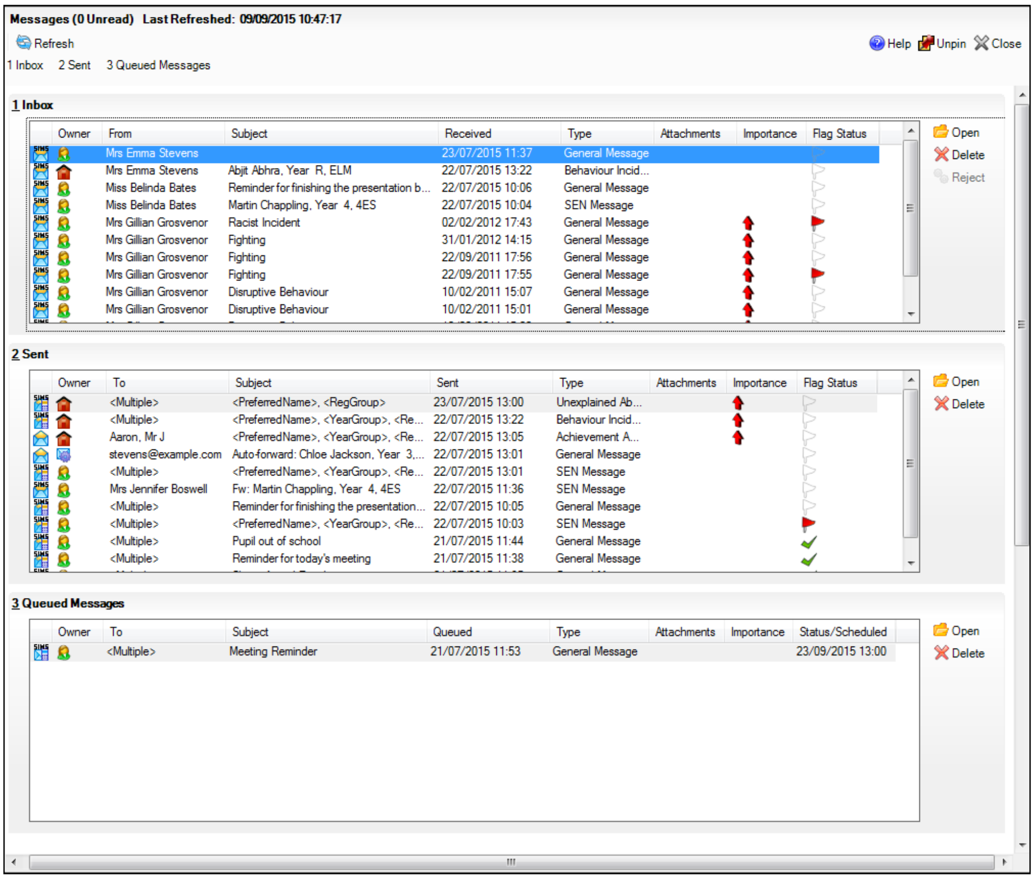
Click the **Restore** button to reduce the panel back to a panel on the SIMS **Home Page**.

 *Restore button*

More Information:
Viewing Received Messages on page *74*
Managing your Messages via the Focus Menu on page *88*

Managing your Messages via the Focus Menu

Select **Focus | InTouch | Show Messages** to display the **Messages** page.



The **Inbox** and **Sent** panels display all of your received and sent messages.

The **Owner** of the message (i.e. **User** or **School**), **Subject**, date and time of the message (**Received**), message **Type**, indication of any **Attachments** and the **Importance** are displayed. Under the **Owner** title the user or school icons indicate **User** or **School** messages respectively. Additionally, received messages display the sender (**From**) and sent messages display the recipient (**To**).

> ***IMPORTANT NOTE: School*** *messages are displayed only if you have permissions to see* ***School*** *messages or if the message is a reply to a message that you have sent.*

 *User icon*

 *School icon*

In the **Inbox** panel, auto-forwarded **User** or **School** messages can be identified by the blue arrow that is incorporated into the **User** and **School** icons.

 *Auto-forwarded **User** message icon*

 *Auto-forwarded **School** message icon*

In the **Inbox** and **Sent** tables and under the **Flag Status** header you can define any type of message as flagged or completed.

1. Click the required message.
2. Click the associated white flag (**Not Flagged** status) to define the message as flagged or completed.

 ***Not Flagged** status (default status)*

 ***Flagged** status*

 ***Completed** status*

> *NOTE: Message flags can also be set from the restored or expanded **Messages** widget on the SIMS **Home Page** screen (please see* Managing your Messages via the SIMS Home Page *on page* 85*).*

Click the toggle **Flag Status** header to change the sort order of your received or sent messages by flagged status. The messages are sorted in a **Not Flagged**, **Flagged**, **Completed** order or in a **Completed**, **Flagged**, **Not Flagged** order.

Any messages sent to you since the page was opened are not displayed automatically. The SIMS **Home Page** uses automatic screen refresh, which updates the **Messages** panel (among others) automatically after a specified period of time has elapsed. It is acknowledged that the automatic refresh employed by the SIMS **Home Page** may lead to a reduction in the performance of your SIMS system, particularly in establishments with a large number of concurrent users. Therefore, an option to refresh the display manually is available.

To check for new messages, click the **Refresh** button. The date and time of the most recent refresh of messages (**Last Refreshed**) are displayed at the top of the page, adjacent to the **Messages** page title.

Double-click the required message to display it or highlight a message then click the **Open** button.

A message can be deleted by highlighting the required one then clicking the **Delete** button. Alternatively, use **Shift + click** or **Ctrl + click** to select a block of messages or selective messages respectively prior to deletion.

When an inbound SMS arrives, SIMS optionally attempts to match it to an SMS sent previously by SIMS. If the attempt to match the SMS to a previously sent SMS is incorrect, click the **Reject** button to remove the match and return the message (as a school message in reply to 'nothing') to the **Messages** inbox.

Messages that cannot be sent immediately, perhaps because of a failure in the messaging service, can be queued and re-sent automatically when the issue is resolved. If you have any messages queued, they are accessible via the **Queued Messages** panel on the **Messages** page (please see *What Happens if SIMS Cannot Immediately Send a Message to an External Source?* on page *218*).

*NOTE: The **Queued Messages** panel is displayed only if you have one or more queued messages.*

More Information:

Viewing Received Messages on page *74*

07 | Managing School Messages

Introduction

WARNING: *This chapter assumes that your School Administrator did <u>not</u> change system's message type defaults in the* ***Message Boxes*** *panel (via* ***Tools | InTouch | Message Type Defaults Setup****) during the InTouch installation.*

School messages can be created and sent (with 'your school' rather than an individual user as the sender) to one or more recipients. For example, your school can send a communication requesting a reason from a parent/guardian for a pupil/student's absence following the recording of an unexplained absence mark (**N**) in the register. Subsequently, the parent/guardian's response can be recorded and saved against the pupil/student's attendance record. This process provides an efficient method of contacting appropriate contacts and requesting information. Any messages sent from an external source by a contact of the school are managed using the **Messages** panel on the SIMS **Home Page** or via **Focus | InTouch | Show Messages**. **School** messages can be identified by the school icon next to the message. The following sections describe the types of School messages that can be sent by SIMS, together with the circumstances under which the messages can be sent.

More Information:
Setting Up Message Type Defaults on page *29*

Sending a Message for Unexplained Absences

A message can be sent to parent/guardians following an instance of unexplained absence being recorded for their child at school. The message can also be sent to the pupil/student, if required. This method of communication facilitates the flow of information to parent/guardians and pupil/students in a time efficient manner and reduces the amount of manual administration that would otherwise be required. It also provides parent/guardians with important information regarding their child's absence from class as soon as the register is taken.

Additionally, the parental contact may be asked to respond to the message, providing information about the absence. The information provided in this reply can then be used to update the pupil/student's attendance record.

An Unexplained Absence message can be sent if an **N** mark (**No reason yet provided for absence**) is recorded in Take Register (via **Focus | Attendance** (or **Lesson Monitor**) **| Take Register**).

A pupil/student's attendance record can be updated with a reason for absence following a response to an unexplained absence message being received.

1. Select **Focus | Attendance** (or **Lesson Monitor**) **| Deal with Unexplained Absences (InTouch)** to display the **Unexplained Absence Management** page.
2. Specify the date range for which you wish to search for unexplained absences by either entering a **Period From** and **Period To** date or clicking the appropriate **Calendar** button then selecting the required date. The date range defaults to display unexplained absences for today <u>only</u> (the **Period From** and **Period To** fields default to today's date).

NOTE: The dates selected must fall within the current academic year.

3. From the drop-down list, select whether you wish to deal with **Session** attendance or **Session & Lesson** attendance.

NOTE: This option is available only if the SIMS Lesson Monitor licence has been applied.

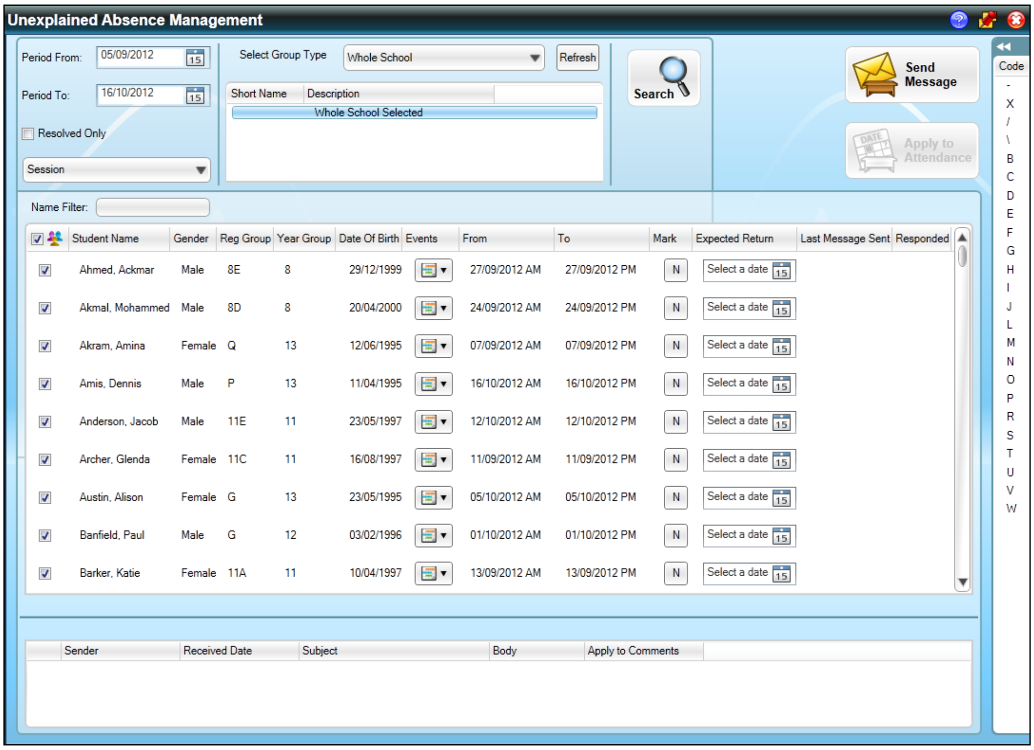
4. If you wish to review absences that have already been resolved by this process, select the **Resolved Only** check box.

   The **Send Message** and **Apply to Attendance** buttons remain disabled at this point.

5. Filter the search by selecting from the **Select Group Type** drop-down list, e.g. by **Year Group**. With the appropriate group type selected, click the required group (e.g. **Year 8**). Multiple groups can be selected using **Ctrl + click** or **Shift + click**.

***IMPORTANT NOTE:** Only if **Session & Lesson** is selected from the drop-down list is it possible to search by **Academic Classes**. Primary schools can also use this functionality to search for classes set up in their curriculum.*

6. Click the **Search** button to display all the pupil/students against whom an unexplained absence has been recorded over the selected timeframe.



For each pupil/student displayed in the browser, information relating to their unexplained absence is displayed, including the periods they have missed (**From** and **To**), any recorded **Events**, their current **Mark** in the register for this absence and their expected return date (**Exp. Return**, which is editable). The date on which the most recent message regarding this absence is also displayed (**Last Message Sent**), together with an indication of whether this message was replied to (**Responded**).

The display order can be changed by clicking the appropriate column header.

The list can be filtered by entering all or part of a pupil/student's forename or surname in the **Name Filter** field. As you type, the list displays those pupil/student's whose forename or surname matches the entered text.

7. Select the check box adjacent to the pupil/student(s) about whom you wish to send a message. Alternatively, select the check box in the column header to select all pupil/student(s) in the table.

> ***IMPORTANT NOTE:*** *Any further actions relating to sending a message or applying comments to attendance are carried out on the selections made on the* <u>*unfiltered*</u> *view. If you have applied a filter to display pupil/students with a specific name then selected their check box(es), any selections made on the unfiltered view are also 'active'. You are strongly advised to remove the content from the* ***Name Filter*** *field to view all the selections made before proceeding.*

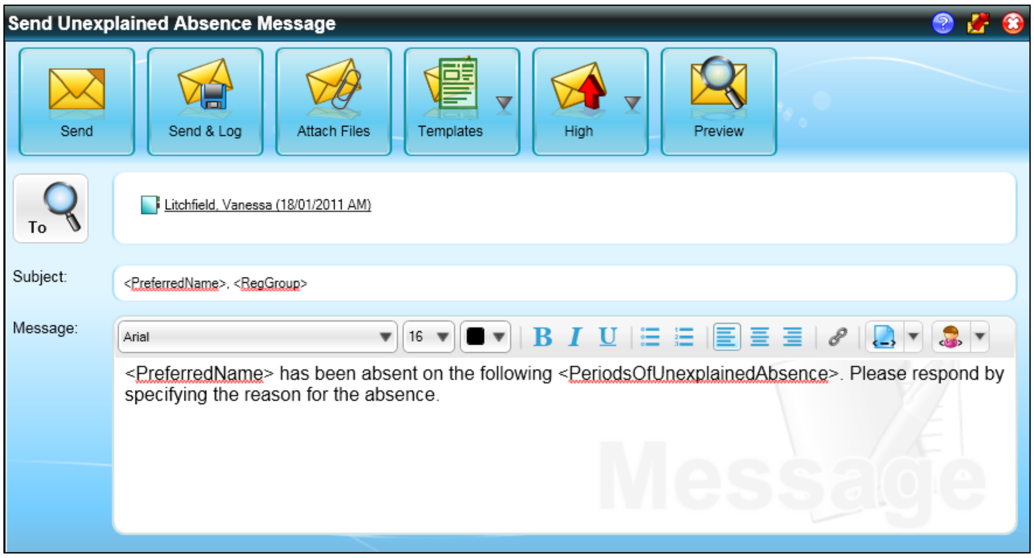
	Pupil Name	Gender	Reg Group	Year Group	Date Of Birth	Events	From	To	Mark	Expected Return	Last Message Sent
	Houghton, Ho	Male	8A	8	31/07/1998		16/05/2011 p1	16/05/2011 p4	N	Select a date	

8. To optionally include the pupil/student as a message recipient, click the **Message Recipients** icon then select the required method of communication for the **Student**. To send a message to the selected recipients, click the **Send Message** button to display the **Send Unexplained Absence Message** page.

Message Recipients icon

If any of the intended recipients do not have the appropriate contact details recorded, the **Notification** dialog is displayed.

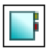
9. Click the **Print** button to print the details, if required, then click the **Ok** button to continue.

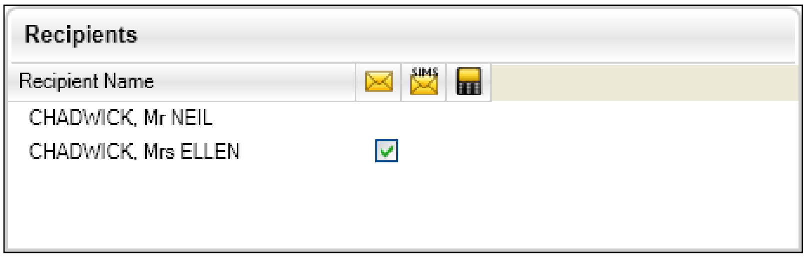


The importance is set automatically to **High** and the default Unexplained Absence template is selected. The **Message** text displayed is the message text contained in the template.

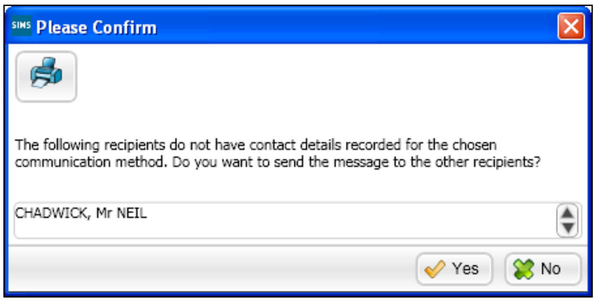
The **To** field is populated with the pupil/student's name.

10. To view the contact(s) to whom the message will be sent, click the **View Contacts** icon adjacent to the pupil/student's name to display the **Recipients** panel.

 *View Contacts icon*



11. Select the appropriate check box(es) of the required recipient(s) to indicate the method of communication then click anywhere outside the **Recipients** panel to minimise it.
12. Send the message (please see *Sending a Pupil/Student Message* on page *52*).
13. When the message is sent, if no contact details are recorded for one or more of the intended recipients, the following message is displayed.



14. Click the **Yes** button to send the message to the remaining recipients. Alternatively click the **No** button to cancel the message, enabling you to record any missing contact details.

Linking an Incoming Message to an Unexplained Absence and Pupil/Student Record

If a parent/guardian contacts your school via email or SMS regarding their child's unauthorised absence from school, their attendance record can be updated via the received message in the **Messages** panel on the SIMS **Home Page**.

> ***IMPORTANT NOTES:*** *An incoming message can be linked to an unexplained absence only if an* ***N*** *mark (****No reason yet provided for absence****) is recorded in Take Register (via* ***Focus | Attendance*** *(or* ***Lesson Monitor****)* ***| Take Register****). This functionality is available for messages received from a pupil/student's contact who has parental responsibility for the child and who does not have a court order recorded against them.*

The message received from a parent/guardian may be in response to an Unauthorised Absence message generated from InTouch (please see *Sending a Message for Unexplained Absences* on page *92*), in which case SIMS will make the link between the Unexplained Absence message and the incoming link. However, a parent/guardian might contact you regarding their child's absence before you have sent them an Unauthorised Absence message, in which case you can select manually the absence to which the message relates, as long as an **N** mark has been recorded in Take Register.

When a message is associated with an unauthorised absence, the content of the message can be stored alongside the absence record as a comment, enabling a complete record of communications relating to the absence to be kept.

When you send an Unauthorised Absence message to a pupil/student's contact, the message is sent to their Primary email address or mobile number. However, when a message is received from a pupil/student's contact in relation to an unauthorised absence, any email address or mobile number recorded against a contact can be used to make the link between the contact and the pupil/student's unauthorised absence record.

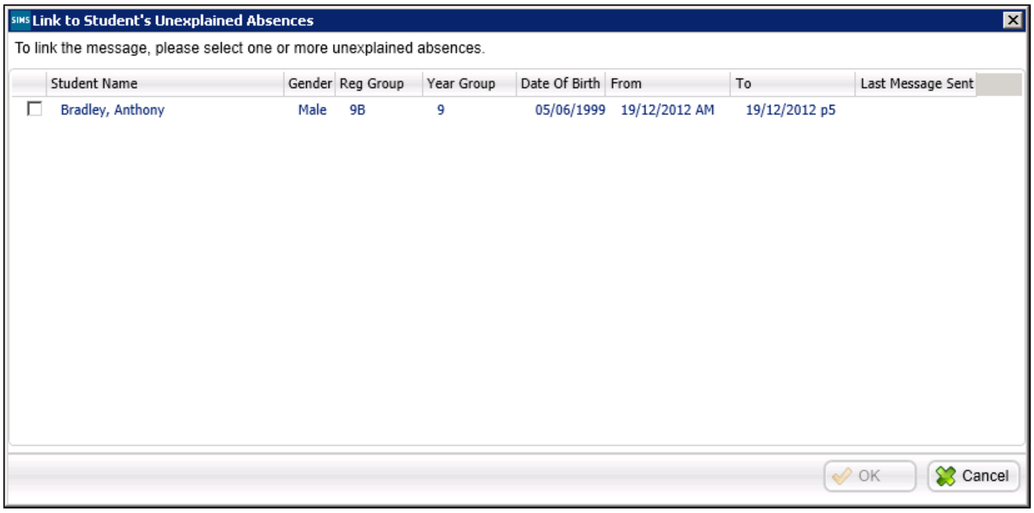
> *NOTE: Users with Attendance Manager and Attendance Operator permissions can deal with unexplained absences but additional permissions (i.e. the School Messages - Run permission) are required to view received messages in the* ***Messages*** *panel on the SIMS* ***Home Page*** *and to link the message to an unauthorised absence. If you require additional permissions to use this functionality, please contact your System Manager.*

1. Select **Focus | Home Page** to display the SIMS **Home Page**.

2. In the **Messages** panel, click the message from the contact that discusses the pupil/student's absence to display the **Review a Message** page (please see *Viewing Received Messages* on page *74*).

3. Click the **Link to Absence** button to display the **Link to Pupil** (or **Student**)**'s Unexplained Absences** dialog.

> *NOTE: If there are no N marks recorded for a pupil/student, the **Link to Absence** button is not displayed. If the message has already been linked to an unauthorised absence, the **Link to Absence** button is not displayed.*

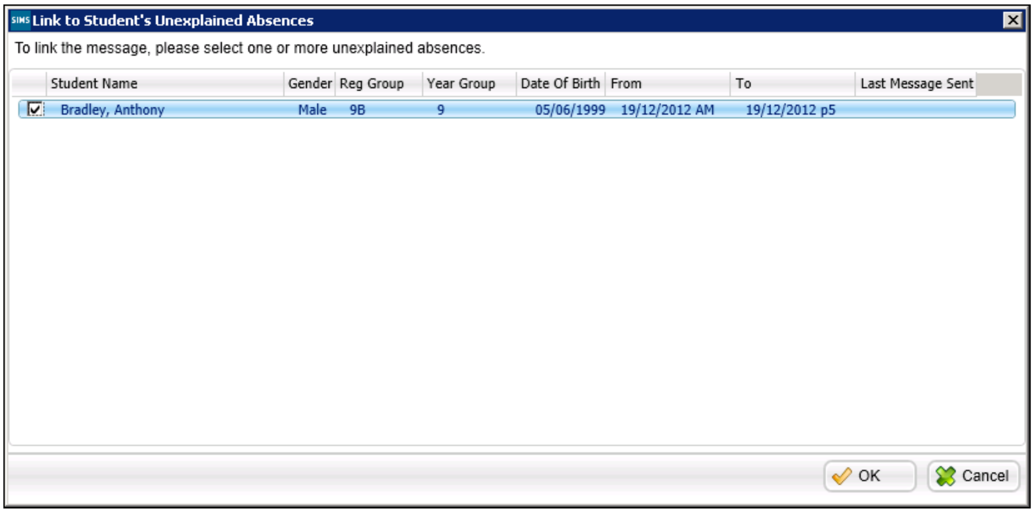


All pupil/students who have an unexplained absence mark recorded against them over the past seven days are displayed.

4. Locate the absence to which the incoming message relates and select the check box to the left of the pupil/student's name.

NOTE: Where multiple absences are displayed for a single pupil/student, or where absences are displayed for more than one pupil/student, any number of absences can be selected and linked to the selected message.

To assist with the selection, the pupil/student's personal details and any periods of unauthorised absences are displayed, together with an indication of whether or not an Unexplained Absence message has been sent (**Last Message Sent**).

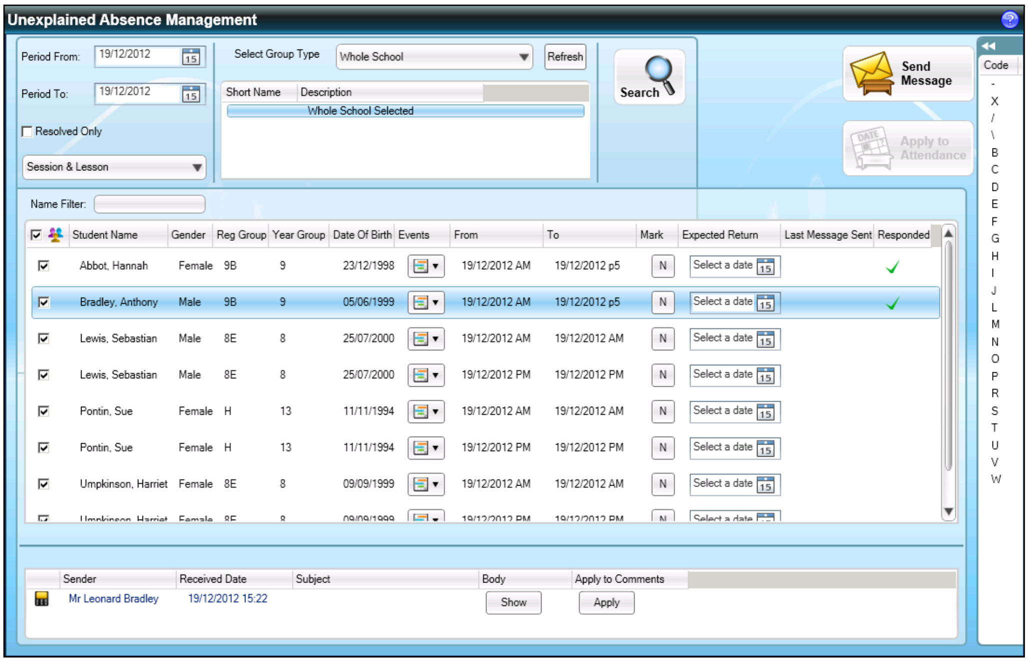


5. Click the **OK** button to display the **Messages** page, where the incoming message is displayed, or click the **Cancel** button to cancel the process.

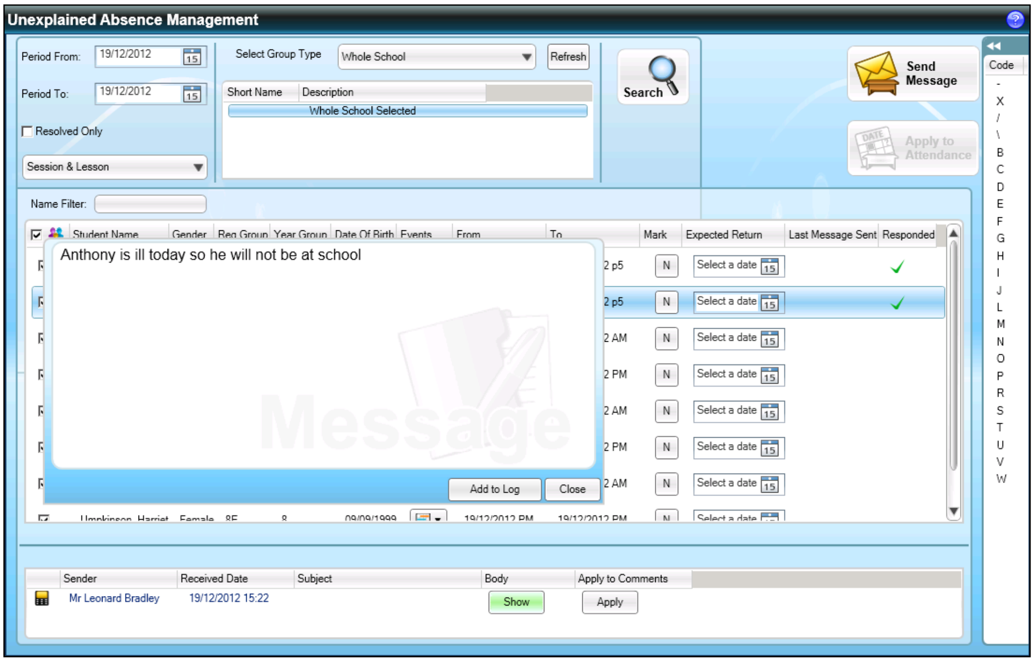
   Whether the incoming message relates to an absence for a single pupil/student or multiple pupil/students, the message type is changed from **General Message** to **Unexplained Absence Message**. If, subsequently, you respond to a message relating to multiple pupil/students, the message type for the reply reverts to **General Message**. The message type of Unexplained Absence Message is retained when replying to a message relating to a single pupil/student.

   Once the message is linked to an unauthorised absence record, you are strongly advised to amend the absence record according to the content of the message.

6. Select **Focus | Attendance** (or **Lesson Monitor**) **| Deal with Unexplained Absences (InTouch)** to display the **Unexplained Absence Management** page then search for the required absence.



7. Click the required unexplained absence record then click the **Show** button in the panel at the bottom of the page to display the content of the incoming message.



- If you want to add the incoming message to the pupil/student's record, click the **Add to Log** button.
- Click the **Close** button to return to the **Unexplained Absence Management** page.

From here, it is also possible to apply the content of the message to an absence record (please see *Applying Incoming Message Text to Event Comments, Take Register and Edit Marks* on page *101*) and to amend the attendance mark based on the content of the message (please see *Recording Attendance Marks using InTouch* on page *103*).

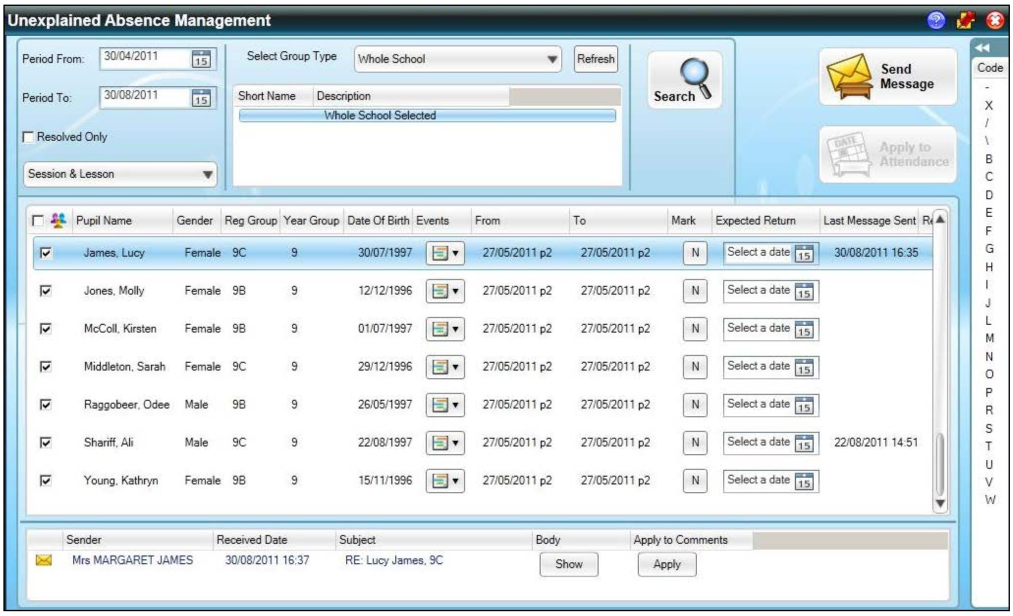
IMPORTANT NOTE: *The list of unexplained absences discussed in Step 3 displays unexplained absences over the past seven days. If you are processing an unexplained absence that started eight days ago and ended seven days ago (e.g. today's date is Wednesday 16 January 2013 and the pupil/student was absent from Tuesday 8 January to Wednesday 9 January), the* ***Responded*** *column will display the correct value (a tick, as displayed in the previous graphic) if you change the* ***Period From*** *and* ***Period To*** *dates to the last day of the absence (e.g. Wednesday 9 January 2013).*

More Information:

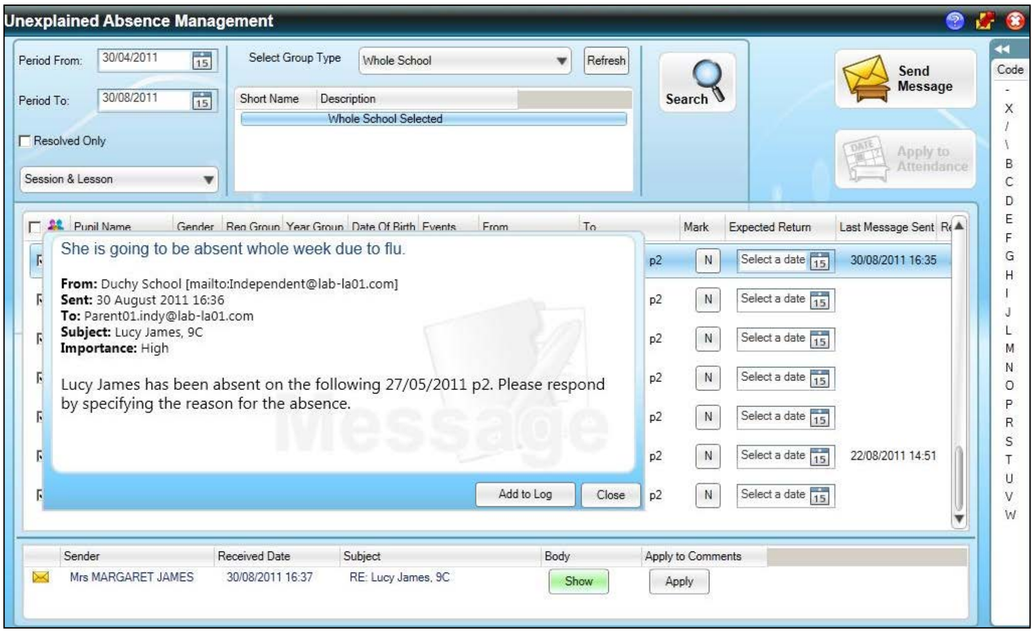
Viewing Received Messages on page *74*
Applying Incoming Message Text to Event Comments, Take Register and Edit Marks on page *101*
Recording Attendance Marks using InTouch on page *103*

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

When a message is received from an external source (via SMS, SIMS Parent app 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.



1. On the **Unexplained Absence Management** page, highlight the required pupil/student to display, in the panel at the bottom of the screen, all responses sent from an external source regarding the unauthorised absence.
2. Click the **Show** button adjacent to the required message to display the content of the message. The original message regarding the absence, originally sent by your school, is also displayed.

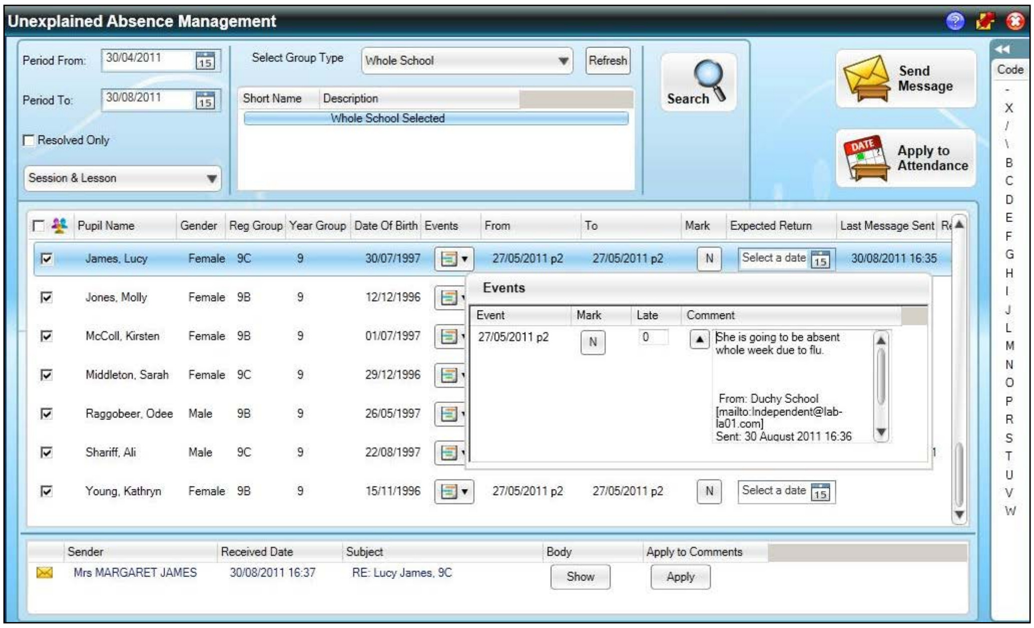


3. To apply the message text so that they are visible in the unexplained absence **Events** section, click the **Apply** button in the **Apply to Comments** column.

   You are given the opportunity to edit the text of the received message, perhaps to remove the **From**, **Sent**, **To**, etc. information displayed in the message. Amend the content as necessary in the pop-up window then click the **Update** button to continue. The edited text will be displayed in the **Events** section and subsequently in Take Register and Edit Marks. Alternatively, all the content of the response can be removed so that nothing is displayed in comments.

   The original message text is retained when the message is viewed via the SIMS **Home Page** or via **Focus | InTouch | Show Messages**.

4. To subsequently view these comments, click the drop-down button in the **Events** column to display the **Events** window.



5. To apply the message text so that they can be viewed in Take Register (via **Focus | Attendance** (or **Lesson Monitor**) **| Take Register**) and Edit Marks (via **Focus | Attendance** (or **Lesson Monitor**) **| Edit Marks**), click the **Apply to Attendance** button. When using Take Register or Edit Marks, comments added in this way are indicated by a red triangle in the top right-hand corner of a cell.

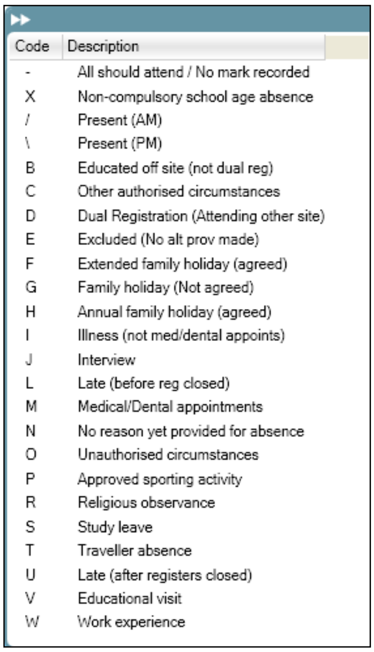
Recording Attendance Marks using InTouch

Once you receive a reply from a parent/guardian regarding the reason for the unexplained absence (via the **Messages** panel on the SIMS **Home Page**), their attendance mark can be updated via the **Unexplained Absence Management** page.

1. Search for all unexplained absences.
2. Expand the **Code** panel by clicking the **View Attendance Codes** button. The panel can be minimised by clicking the **Hide Attendance Codes** button.

 *View Attendance Codes button*

 *Hide Attendance Codes button*



Code	Description
-	All should attend / No mark recorded
X	Non-compulsory school age absence
/	Present (AM)
\	Present (PM)
B	Educated off site (not dual reg)
C	Other authorised circumstances
D	Dual Registration (Attending other site)
E	Excluded (No alt prov made)
F	Extended family holiday (agreed)
G	Family holiday (Not agreed)
H	Annual family holiday (agreed)
I	Illness (not med/dental appoints)
J	Interview
L	Late (before reg closed)
M	Medical/Dental appointments
N	No reason yet provided for absence
O	Unauthorised circumstances
P	Approved sporting activity
R	Religious observance
S	Study leave
T	Traveller absence
U	Late (after registers closed)
V	Educational visit
W	Work experience

3. Highlight the pupil/student whose attendance mark you wish to amend.
4. Double-click the attendance code that indicates the reason for the unexplained absence. The new code is displayed in the **Mark** column for the selected pupil/student, replacing the existing **N** mark.
5. Repeat steps 3 to 4 for any other pupil/students whose attendance mark you wish to update.

   Once an attendance mark has been changed using this method, the **Apply to Attendance** button becomes enabled.
6. Click the **Apply to Attendance** button to update the attendance record of each of the pupil/students whose mark has been amended.

   Any pupil/student whose marks have been amended are now resolved and their names are removed from the page. All unexplained absences that have now been resolved can be viewed by selecting the **Resolved Only** check box then clicking the **Search** button.

Sending a Behaviour Incident Message

Behaviour Management in SIMS is used to record and monitor pupil/student behaviour. Specifically, the behaviour area relates to the recording of incidences of pupil/student misbehaviour, such as bullying, insolence and fighting.

When a pupil/student is involved in a behaviour incident, you may wish to inform their parent/carers. By providing an automated approach to communicating, details of the incident can be disseminated quickly and easily, as well as raising awareness with the parent/carers of their child's conduct.

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser.
2. Search for then select the pupil/student for whom you wish to record a behaviour incident.

3. Click the **Behaviour Management** hyperlink in the **Links** panel to display the **Behaviour Management** page.
4. In the **Behaviour** panel, click the **New** button to create a new behaviour incident record or highlight an existing behaviour incident and click the **Open** button to display the **Add** (or **Edit**) **Behaviour** dialog.
5. Enter or edit any required details then click the **Send** button.
6. Confirm that you wish to save and continue by clicking the **Yes** button to display the **Search** browser.

More Information:
Sending a Pupil/Student Message on page *52*

Sending an Achievement Award Message

Behaviour Management in SIMS is used to record and monitor pupil/student behaviour. Specifically, the achievement area relates to the recording of pupil/student awards, such as academic achievements or sporting accolades. An achievement can be assigned either to an individual pupil/student or to a number of pupil/students involved in a commendable activity or event.

When a pupil/student is commended with an achievement award, you may wish to inform their parent/carers. By providing an automated approach to communicating, details of the award can be disseminated quickly and easily, as well as raising awareness with the parent/carers of their child's conduct.

1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser.
2. Search for then select the pupil/student for whom you wish to record an achievement award.
3. Click the **Behaviour Management** hyperlink in the **Links** panel to display the **Behaviour Management** page.
4. In the **Achievement** panel, click the **New** button to create a new achievement record or highlight an existing achievement and click the **Open** button to display the **Add** (or **Edit**) **Achievement** dialog.
5. Enter or edit any required details then click the **Send** button.
6. Confirm that you wish to save and continue by clicking the **Yes** button to display the **Search** browser.

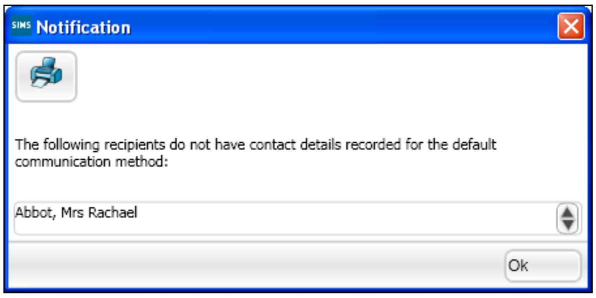
More Information:
Sending a Pupil/Student Message on page *52*

Sending a Pupil/Student Profile Message

Pupil/student profile reports are generally compiled by class teachers on a termly or annual basis. The reports detail the pupil/student's progress in the various subjects they are currently studying. Once profile reports have been generated, it is possible to communicate their availability to parent/guardians, other teachers and pupil/students.

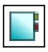
Once profile reports have been generated, an internal message, email or mobile message (depending on the intended recipient's default method of communication) can be sent to a pupil/student's parent/guardian(s).

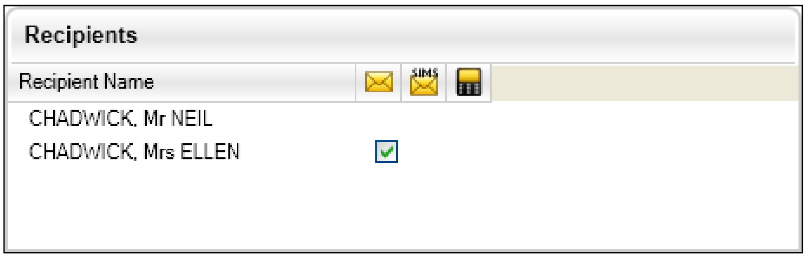
1. Select **Focus | Profiles | Pupil** (or **Student**) **Profiles** to display the **Find Session** browser.
2. Generate the required pupil/student profile(s) by selecting the required pupil/students then clicking the **Generate** button.
3. Click the **Send** button to display the **Send Pupil** (or **Student**) **Profile Message** page.
4. If any of the parent/guardians of the affected pupil/students do not have the appropriate contact details recorded, the **Notification** dialog is displayed.



5. Click the **Print** button to print the details, if required, then click the **Ok** button to continue.

   The **To** list is populated with the names of all the affected pupil/students.
6. To view the contact(s) to whom the message will be sent, click the **View Contacts** icon adjacent to the pupil/student's name to display the **Recipients** panel.

 *View Contacts icon*



7. Select the appropriate check box(es) of the required recipient(s) to indicate the method of communication then click anywhere outside the **Recipients** panel to minimise it.

More Information:
Sending a Pupil/Student Message on page *52*

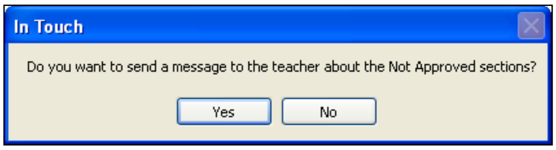
Sending a Not Approved Pupil/Student Profile Message

Pupil/student profile reports are generally compiled by class teachers on a termly or annual basis. The reports detail the pupil/student's progress in the various subjects they are currently studying. Before profile reports can be generated, members of the Senior Leadership Team must approve the various sections of the report. Members of the Senior Leadership Team responsible for approving the report sections are:

- Head of Year
- Head of House
- Head of Faculty
- Head Teacher
- Other members of the Senior Leadership Team

A Not Approved Pupil/Student Profile message can be sent as part of the profile review process. If a profiles report has been marked as *Not Approved* by a member of the Senior Leadership Team, a message can be sent to the class teacher, informing them that one or more sections have not been approved.

1. Select **Focus | Profiles | Review Profiles** to display the **Review Profiles** browser.
2. Highlight the required session then double-click a pupil/student whose profile you wish to mark as not approved.
3. For either a comment or an entire area, select **Not Approved** from the drop-down list.
4. Click the **Save** button to display the following message.



5. To send a message to the appropriate teacher, click the **Yes** button to display the **Send Not Approved Profile Message** page. Alternatively, click the **No** button to cancel the process.

More Information:
Sending a Pupil/Student Message on page *52*

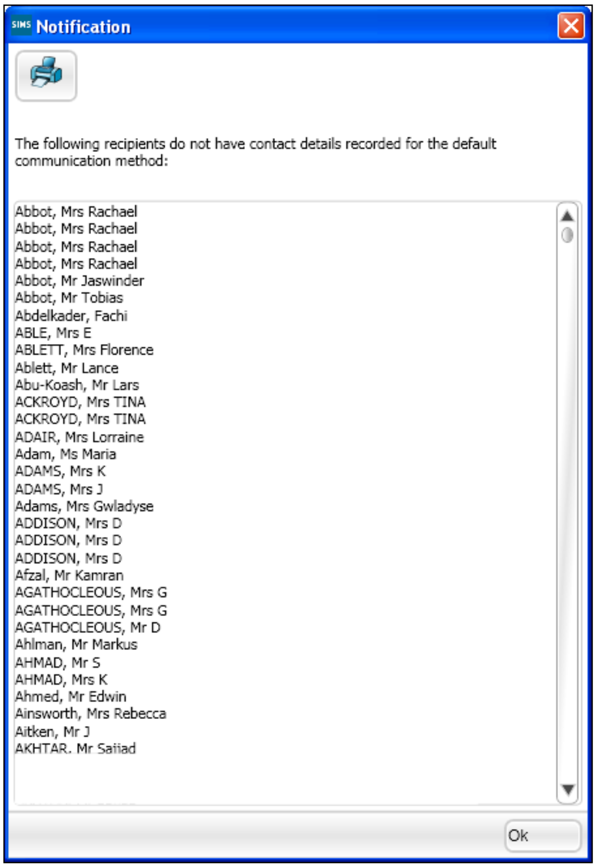
Sending an Exceptional Circumstance Message

A message can be sent as part of the set up of an exceptional circumstance. The message can be sent to all parent/guardians with the appropriate contact details recorded, together with pupil/students and members of staff. An example of its use would be in the event of a school closure and you want to inform all interested parties.

> *NOTE: An Exceptional Circumstance message can be sent only from a saved exceptional circumstance record.*

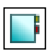
1. Select **Focus | Attendance** (or **Lesson Monitor**) **| Exceptional Circumstances** to display the **Find an Exceptional Circumstance** browser.
2. Either create a new record then re-open it, or open an existing exceptional circumstance to display its details on the **View/Edit Exceptional Circumstance** page.
3. Click the **Send** button to display the **Send Exceptional Circumstance Message** page.

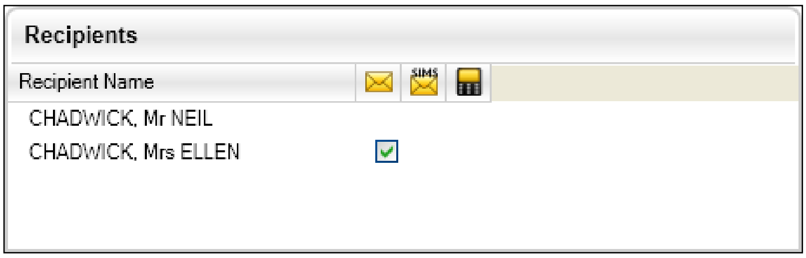
   If any of the parent/guardians of the affected pupil/students do not have the appropriate contact details recorded, the **Notification** dialog is displayed.



4. Click the **Print** button to print the details, if required, then click the **Ok** button to continue.

   The **To** list is populated with the names of all the affected pupil/students.
5. To view the contact(s) to whom the message will be sent, click the **View Contacts** icon adjacent to the pupil/student's name to display the **Recipients** panel.

 *View Contacts icon*



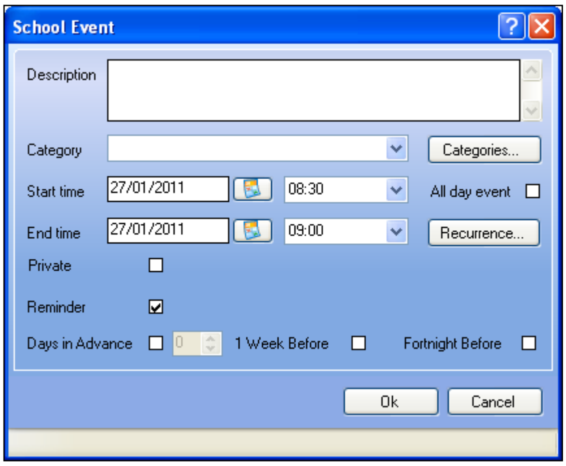
6. Select the appropriate check box(es) of the required recipient(s) to indicate the method of communication then click anywhere outside the **Recipients** panel to minimise it.

More Information:
Sending a Pupil/Student Message on page *52*

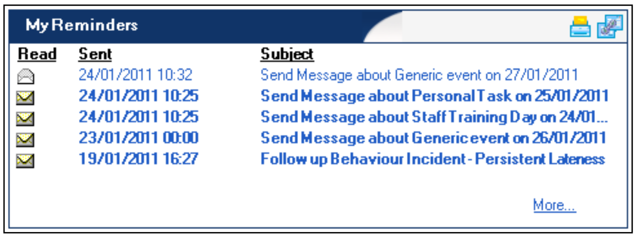
Sending a School Event Message or Staff Training Day Message

A message can be sent regarding a school event (e.g. Staff Training Day, Parent Consultation Evening, etc.) recorded in the School Diary (via **Focus | School | School Diary**). If a reminder has been added to the school event, a message will be displayed in the **My Reminders** panel on the SIMS **Home Page**. From this message, a personal task is created and a message can be sent to all interested parties (members of staff, parent/guardians and other contacts) to remind them of the event.

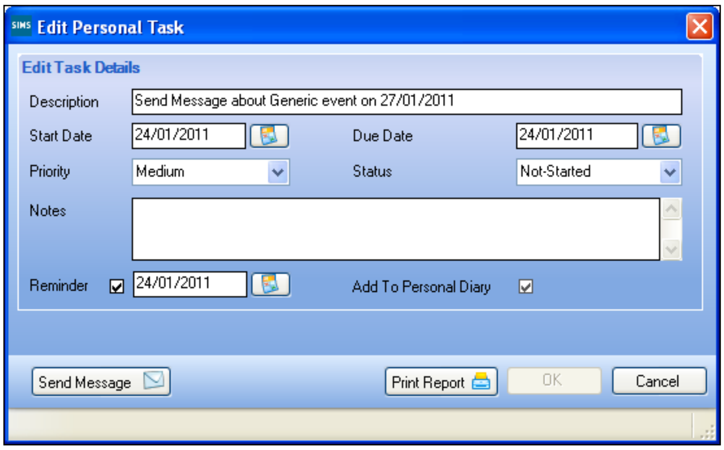
1. When recording an event on the School Diary, ensure that the **Reminder** check box is selected and that you select the **Days in Advance** (then enter the number of days in advance you want the reminder to be sent), **1 Week Before** or **Fortnight Before** check box.



2. If a reminder has been requested for a school event recorded on the School Diary, the reminder will be sent at the defined time. When the requested reminder is sent, it is displayed in the **My Reminders** panel on the SIMS **Home Page**.



3. Click the required message to display its details in the **Edit Personal Task** dialog.



4. Edit any of the details, if required.
5. To send a message to other members of staff associated with the task, click the **Send Message** button to display the **Send School Event Message** page.

More Information:
Sending a Pupil/Student Message on page *52*

Sending a Missing Register Message

A message can be sent to any teacher who has not completed their register on time.

On the SIMS **Home Page**, select the check box adjacent to the required **Missing Register Notification** then click the **Send Message** button.

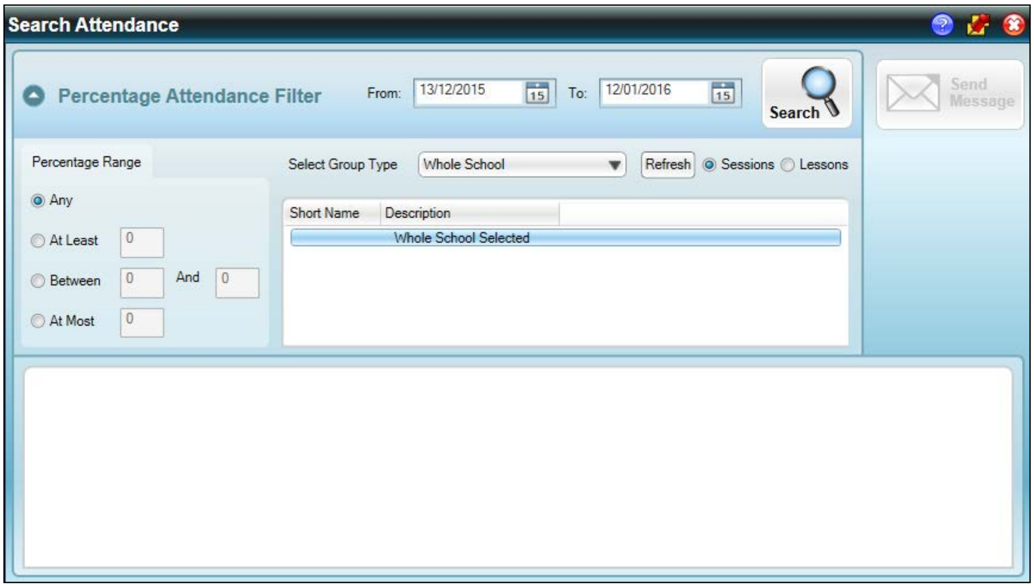
A Missing Register message is sent to the appropriate teacher as a **User** message. The message is displayed in the **Messages** panel of the teacher's **Home Page** or via **Focus | InTouch | Show Messages**.

Sending a Percentage Attendance Notification Message

Messages can be sent to parental contacts and other interested contacts regarding a pupil/student's school attendance. This enables your school to increase awareness among parental contacts of their child's attendance.

Messages can be sent in praise of a child's attendance, e.g. they have attended 100% of their sessions this term, or to inform a parental contact of unacceptable levels of absenteeism by pupil/students with a poor attendance record.

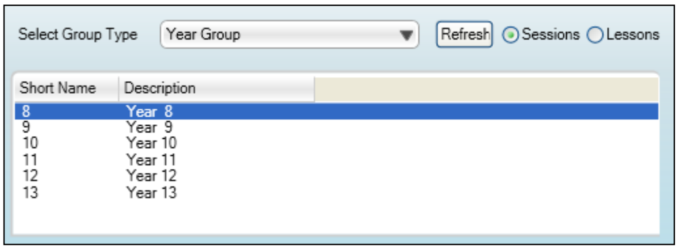
1. Select **Focus | Attendance** (or **Lesson Monitor**) **| Send Percentage Attendance Notifications (InTouch)** to display the **Search Attendance** page.



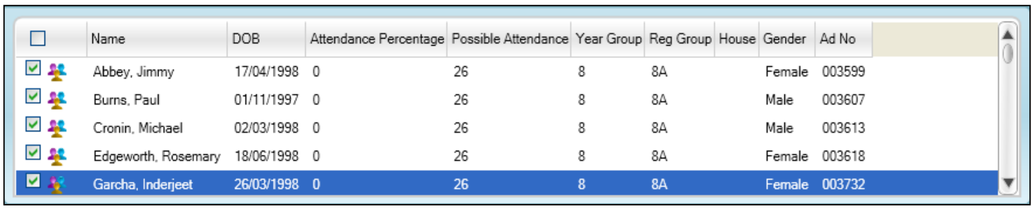
2. Select the **Percentage Range** by selecting the appropriate radio button then entering the required figure. The options are:
   - **Any** – selecting this option produces a list of pupil/student attendance. This option is selected as default.
   - **At Least** – selecting this option enables you to specify the minimum percentage attendance that must be achieved for a pupil/student to be included. Enter the figure in the adjacent field.
   - **Between** – selecting this option enables you to specify the percentage range of attendance that must be achieved for a pupil/student to be included. Enter the figures in the two adjacent fields.
   - **At Most** – selecting this option enables you to specify a percentage figure of attendance, with any pupil/students, who match or fall below this level, being included. Enter the figure in the adjacent field.
3. Select the date range over which you wish to gather attendance information by entering dates in the **From** and **To** fields, or by clicking the respective **Calendar** buttons then selecting the required dates. The dates entered must fall within a single academic year.

   The **From** date defaults to either the start date of the current academic year or one month ago, whichever is the most recent. The **To** date defaults to yesterday's date.

4. Select the scope from the **Select Group Type** drop-down list, e.g. **Whole School**, **Year Group**, etc. The option selected determines the display of the following table.



5. Highlight the appropriate option(s) in the table to indicate the required group(s).
6. Select either the **Sessions** or **Lessons** radio button.
7. Click the **Search** button to display in the panel at the bottom of the page, all pupil/students who match the search criteria entered.



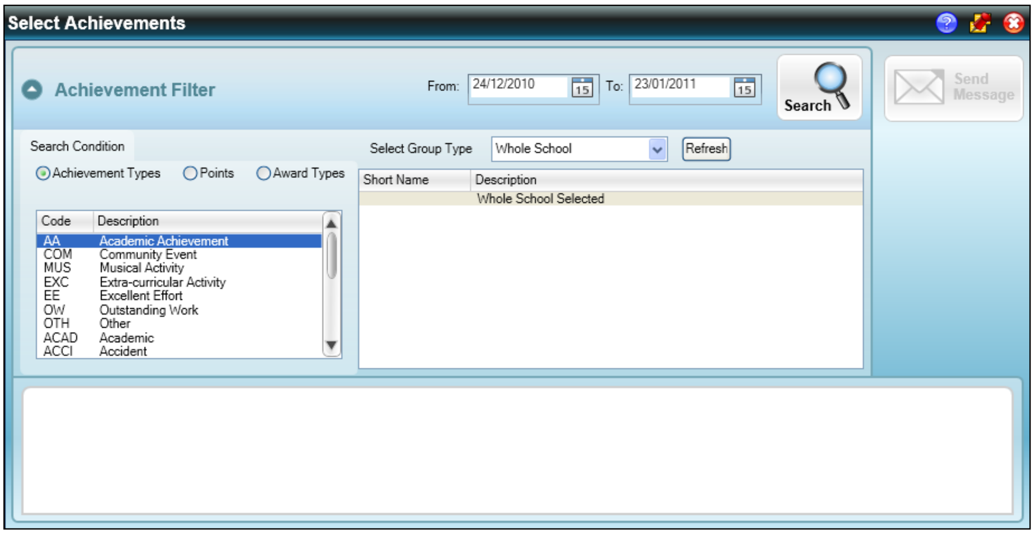
8. Select the check box of each pupil/student for whom you wish to send a message. Alternatively, select the check box in the column header to select all pupil/students displayed in the list.
9. Click the **Send Message** button to display the **Send Percentage Attendance Notification Message** page.

More Information:
Sending a Pupil/Student Message on page *52*

Sending an Achievement Notification Message

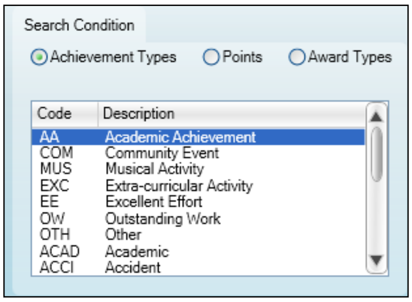
Messages can be sent to parental contacts and other interested contacts when a pupil/student has been commended with an achievement award. For example, you may wish to send a message to a parent/guardian or other contact if a pupil/student achieves 10 achievement points. This enables your school to increase awareness among parental contacts of their child's conduct.

1. Select **Focus | Behaviour Management | Achievement Notifications (InTouch)** to display the **Select Achievements** page.



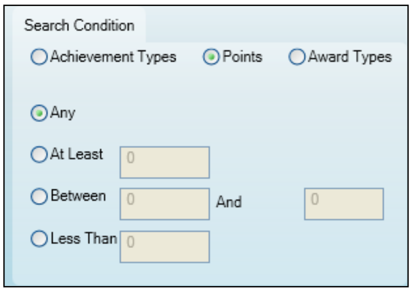
2. Choose the required **Search Condition** by selecting the appropriate radio button then entering or selecting the required details.

   - **Achievement Types**



   Highlight the achievement type(s) for which you wish to search.

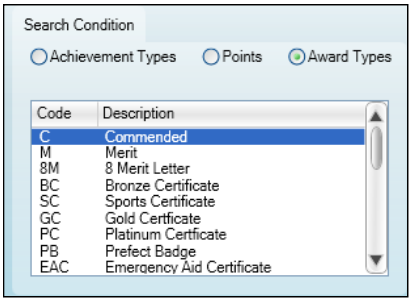
   - **Points**



Select the points score for which you wish to search by selecting the appropriate radio button then entering the required figure. The options are:

- **Any** – selecting this option produces a list pupil/student with any achievements recorded. This option is selected as default.
- **At Least** – selecting this option enables you to specify the minimum number of achievement points that must be achieved for a pupil/student to be included. Enter the figure in the adjacent field.
- **Between** – selecting this option enables you to specify the achievement points range that must be achieved for a pupil/student to be included. Enter the figures in the two adjacent fields.
- **Less Than** – selecting this option enables you to specify an achievement points figure, with any pupil/students falling below this level being included. Enter the figure in the adjacent field.

- **Award Types**

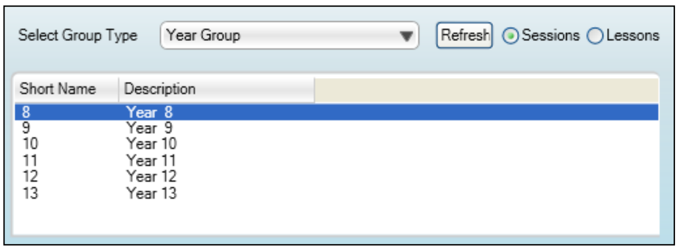


Highlight the award type(s) for which you wish to search.

3. Select the date range over which you wish to gather achievement information by entering dates in the **From** and **To** fields, or by clicking the respective **Calendar** buttons then selecting the required dates. The dates entered must fall within a single academic year.

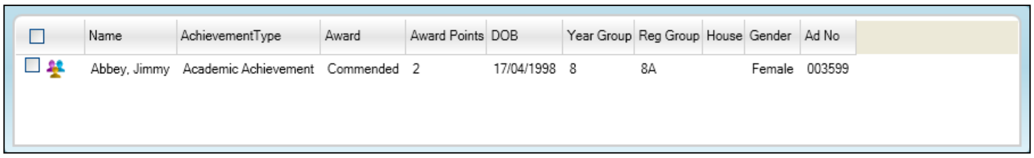
   The **From** date defaults to either the start date of the current academic year or one month ago, whichever is the most recent. The **To** date defaults to yesterday's date.

4. Select the scope from the **Select Group Type** drop-down list, e.g. **Whole School**, **Year Group**, etc. The option selected determines the display of the following table.



5. Highlight the appropriate option(s) in the table to indicate the required group(s).

6. Click the **Search** button to display in the panel at the bottom of the page, all pupil/students who match the search criteria entered.



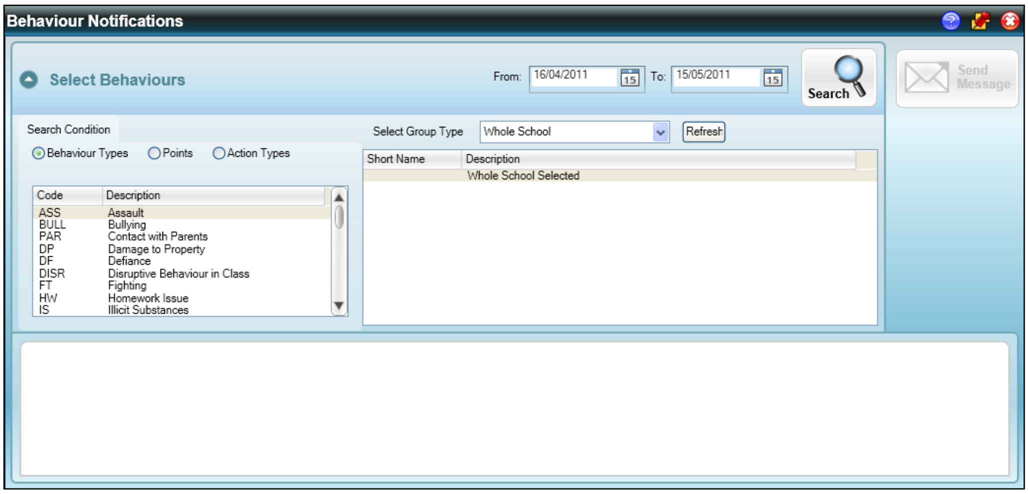
7. Select the check box of each pupil/student for whom you wish to send a message. Alternatively, select the check box in the column header to select all pupil/students displayed in the list.
8. Click the **Send Message** button to display the **Send Achievement Message** page.

More Information:
Sending a Pupil/Student Message on page *52*

Sending a Behaviour Notification Message

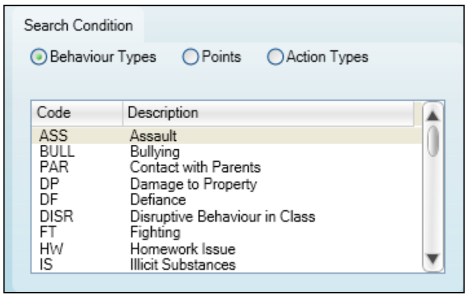
Messages can be sent to parental contacts and other interested contacts when a pupil/student has been involved in a behaviour incident. For example, you may wish to send a message to a parent/guardian or other contact if a pupil/student accumulates a total of 10 behaviour points. This enables your school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

1. Select **Focus | Behaviour Management | Behaviour Notifications (InTouch)** to display the **Behaviour Notifications** page.



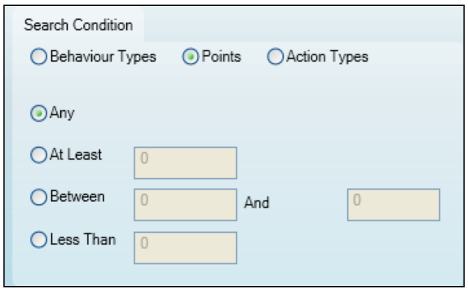
2. Choose the required **Search Condition** by selecting the appropriate radio button then entering or selecting the required details.

- **Behaviour Types**



Highlight the behaviour type(s) for which you wish to search.

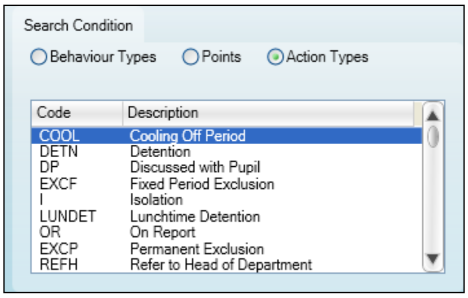
- **Points**



Select the points score for which you wish to search by selecting the appropriate radio button then entering the required figure. The options are:

- **Any** – selecting this option produces a list of pupil/students with any behaviour incidents recorded. This option is selected as default.
- **At Least** – selecting this option enables you to specify the minimum number of behaviour incident points that must be recorded for a pupil/student to be included. Enter the figure in the adjacent field.
- **Between** – selecting this option enables you to specify the behaviour points range that must be recorded for a pupil/student to be included. Enter the figures in the two adjacent fields.
- **Less Than** – selecting this option enables you to specify a behaviour points figure, with any pupil/students falling below this level being included. Enter the figure in the adjacent field.

- **Action Types**

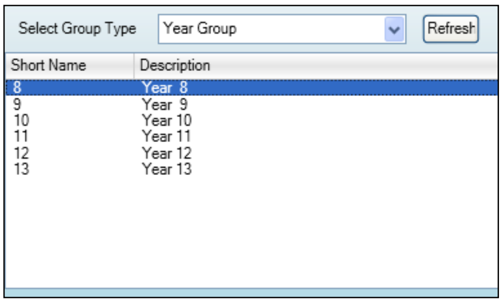


Highlight the action type(s) for which you wish to search.

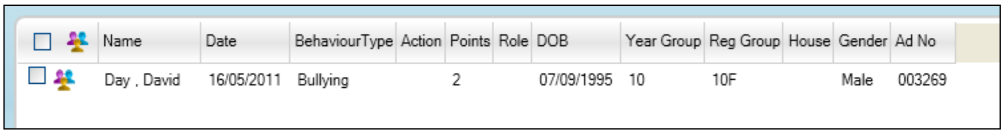
3. Select the date range over which you wish to gather behaviour information by entering dates in the **From** and **To** fields, or by clicking the respective **Calendar** buttons then selecting the required dates. The dates entered must fall within a single academic year.

   The **From** date defaults to either the start date of the current academic year or one month ago, whichever is the most recent. The **To** date defaults to yesterday's date.

4. Select the scope from the **Select Group Type** drop-down list, e.g. **Whole School**, **Year Group**, etc. The option selected determines the display of the following table.



5. Highlight the appropriate option(s) in the table to indicate the required group(s).
6. Click the **Search** button to display in the panel at the bottom of the page, all pupil/students who match the search criteria entered.



7. Select the check box of each pupil/student for whom you wish to send a message. Alternatively, select the check box in the column header to select all pupil/students displayed in the list.
8. Click the **Send Message** button to display the **Send Behaviour Incident Message** page.

More Information:
Sending a Pupil/Student Message on page *52*

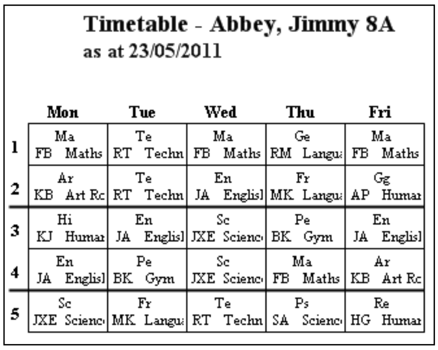
Sending a Pupil/Student Timetable Message

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

1. Select **Reports | Timetables | Student Timetable(s)** to display the **Select Students** dialog.

IMPORTANT NOTE: *This report is also available from the* ***Student Details*** *page (****Focus | Student | Student Details****) by clicking the* ***Timetable*** *hyperlink in the* ***Links*** *panel then clicking the* ***Preview*** *button.*

2. Enter or select the required options then click the **OK** button to display the report output on the **Student Timetable** page. For full instructions on running this report, please refer to the *Producing Student List, Student Analysis and Timetable Reports* handbook.

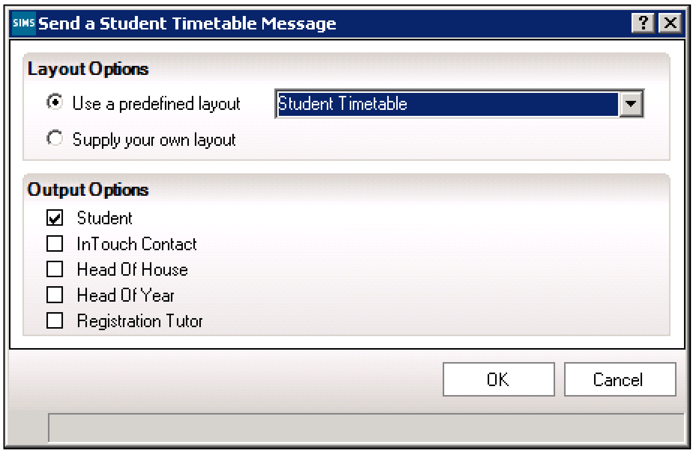


Timetable - Abbey, Jimmy 8A
as at 23/05/2011

	Mon	Tue	Wed	Thu	Fri
1	Ma FB Maths	Te RT Techn	Ma FB Maths	Ge RM Langu	Ma FB Maths
2	Ar KB Art Rc	Te RT Techn	En JA Englisl	Fr MK Langu	Gg AP Huma
3	Hi KJ Huma	En JA Englisl	Sc JXE Scienc	Pe BK Gym	En JA Englisl
4	En JA Englisl	Pe BK Gym	Sc JXE Scienc	Ma FB Maths	Ar KB Art Rc
5	Sc JXE Scienc	Fr MK Langu	Te RT Techn	Ps SA Scienc	Re HG Huma

The report layout can now be modified.

3. Click the **Send** button to display the **Send a Student Timetable Message** dialog.



4. Specify the preferred layout option by selecting the appropriate radio button.
   - **Use a predefined layout**

     The **Default Layout** is selected and cannot be edited.
   - **Supply your own layout**

     This option is available for schools that prefer a report layout that is different to the default layout available in SIMS. Before selecting this option, an .XSL or .XSLT file (recommended for the production of a printed output from .XML) must have been created.

     Click the **Browse** button to display the **Select a layout file** dialog, navigate to the required location, highlight the required .XSL file then click the **Open** button to return to the **Run a Screen Based Report** dialog. Alternatively, enter the path and filename manually.
5. In the **Output Options** panel, select the type(s) of person to whom you wish to send the timetable by selecting the appropriate check box(es).

6. Click the **OK** button to display the **Send Student Timetable Message** page. The pupil/student's timetable is attached to the message automatically.

More Information:
Sending a Pupil/Student Message on page *52*

Sending a Staff Timetable Message

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

1. Select **Reports | Timetables | Staff Timetable(s)** to display the **Select Students** dialog.

> ***IMPORTANT NOTE:*** *This report is also available from the* ***Employee Details*** *page (****Focus | Person | Staff****) by clicking the* ***Staff Timetable*** *hyperlink in the* ***Links*** *panel then clicking the* ***Preview*** *button.*

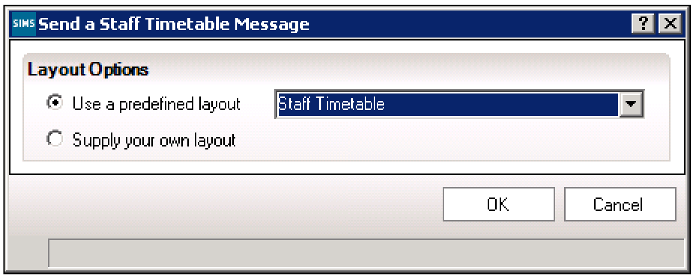
2. Enter or select the required options then click the **OK** button to display the report output on the **Staff Timetable** page. For full instructions on running this report, please refer to the *Producing Student List, Student Analysis and Timetable Reports* handbook.

Timetable - Mrs A Abell
as at 21/04/2010

	Mon	Tue	Wed	Thu	Fri
1	10y/Sc2 Science Lab	9y/Sc1 Science Lab	11y/Sc2 Science Lab	13A/Bil Science Lab	13A/Bil Science Lab
2	PPA	9y/Sc1 Science Lab	11y/Sc2 Science Lab	13A/Bil Science Lab	
3		10y/Sc2 Science Lab	7D/Sc Science Lab	9y/Sc1 Science Lab	7D/Sc Science Lab
4		11y/Sc2 Science Lab	7D/Sc Science Lab	10y/Sc2 Science Lab	11y/Sc2 Science Lab
5	13A/Bil Science Lab		PPA	8F/Ps Science Lab	10y/Sc2 Science Lab

The report layout can now be modified.

3. Click the **Send** button to display the **Send a Staff Timetable Message** dialog.



4. Specify the preferred layout option by selecting the appropriate radio button.
   - **Use a predefined layout**

     The **Default Layout** is selected and cannot be edited.
   - **Supply your own layout**

This option is available for schools that prefer a report layout that is different to the default layout available in SIMS. Before selecting this option, an .XSL or .XSLT file (recommended for the production of a printed output from .XML) must have been created.

Click the **Browse** button to display the **Select a layout file** dialog, navigate to the required location, highlight the required .XSL file then click the **Open** button to return to the **Run a Screen Based Report** dialog. Alternatively, enter the path and filename manually.

5. Click the **OK** button to display the **Send Staff Timetable Message** page. The staff member's timetable is attached to the message automatically.

More Information:
Sending a Pupil/Student Message on page *52*

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.

1. Select **Focus | Behaviour Management | Maintain Detentions** to display the **Find Detentions** page.
2. Select the required detention details then click the **Search** button to display the **Detention Details** page. For full instructions on recording detention details, please refer to the *Recording Detentions* chapter of the *Managing Pupil/Students* handbook.
3. In the **Linked Students** panel, click the **Send** button to display the **Search** browser.

More Information:
Sending a Pupil/Student Message on page *52*

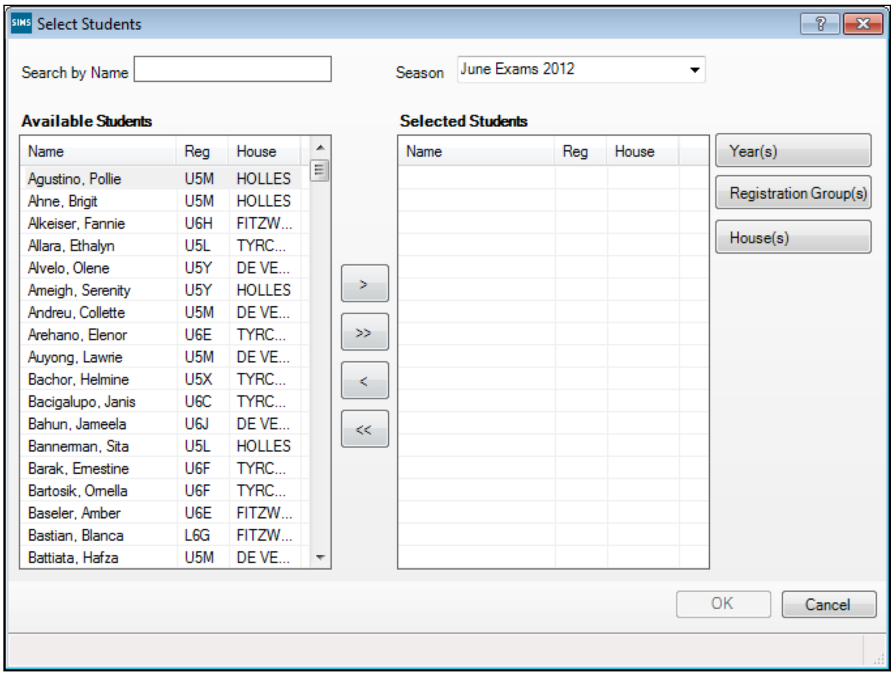
Sending a Pupil/Student Exam Timetable Message

You can send an email message to examination candidates, containing their exam timetables. The message can also be sent to any InTouch contact, together with their Head of House, Head of Year and Registration Tutor.

The exam timetable produced includes details about the candidate, the examination title, the date and time of the exam, the room name and the candidate's seat number. This report resembles the Candidate Timetable - Default report available in Examinations Organiser (via **Reports | Entries | Candidate Timetables - Default**).

The **Priority** of this type of message is **1** and the **Importance** is **Medium**.

1. Select **Reports | Exams | Send Timetables** to display the **Select Students** dialog.



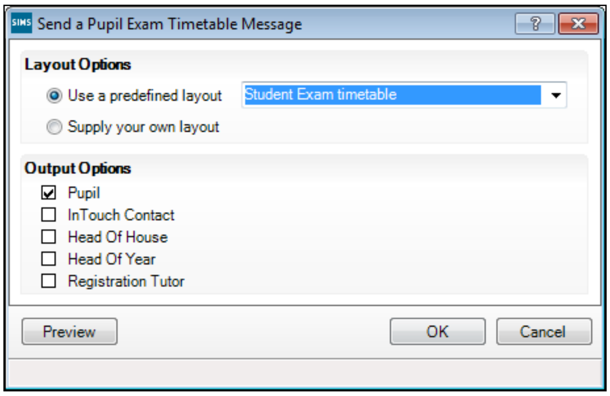
2. Select the **Season** for which you want to send exam timetables from the drop-down list. This defaults to the season marked as **Current** in Examinations Organiser but any future exam season can be selected. Selecting a season populates the **Available Students** panel with the names of all exam candidates who are in the cohort of the exam season and who are taking at least one examination in the selected season.

   There are a number of methods of selecting the pupil/students to whom you want to send exam timetables:

   - Select individual pupil/students (please see *Selecting Individual Pupil/Students* on page *123*).
   - Select pupil/students of a specified year group (please see *Selecting Pupil/Students of a Year Group* on page *123*).
   - Select pupil/students of a specified registration group (please see *Selecting Pupil/Students of a Registration Group* on page *124*).
   - Select pupil/students of a specified house (please see *Selecting Pupil/Students of a House* on page *125*).

> ***IMPORTANT NOTE:*** *The addition of* ***Selected Students*** *is a cumulative process. For example, selecting an individual pupil/student, adding pupil/students from a year group then adding pupil/students from a registration group will display in the* ***Selected Students*** *panel the pupil/students from the three selections.*

3. Once the required pupil/students are selected, click the **OK** button to display the **Send a Student Exam Timetable Message** dialog.

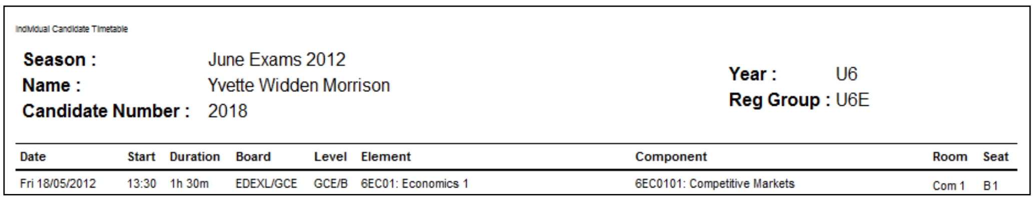


4. Specify the preferred layout option by selecting the appropriate radio button.
   - **Use a predefined layout**

     The **Student Exam timetable** layout is selected automatically and cannot be edited.
   - **Supply your own layout**

     This option is available for schools that prefer a report layout that is different to the default layout available in SIMS. Before selecting this option, an .XSL or **.**XSLT file (recommended for the production of a printed output from .XML) must have been created.

     Click the **Browse** button to display the **Select a layout file** dialog, navigate to the required location, highlight the required **.**XSL file then click the **Open** button to return to the **Send a Student Exam Timetable Message** dialog. Alternatively, enter the path and filename manually.
5. In the **Output Options** panel, select the type(s) of person to whom you wish to send the exam timetable by selecting the appropriate check box(es). The check box(es) selected by default are the roles defined in the **Exam and Student Timetable** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
6. Click the **Preview** button to display the output in your web browser, if required.


Individual Candidate Timetable

Season : June Exams 2012
Name : Yvette Widden Morrison
Candidate Number : 2018
Year : U6
Reg Group : U6E

Date	Start	Duration	Board	Level	Element	Component	Room	Seat
Fri 18/05/2012	13:30	1h 30m	EDEXL/GCE	GCE/B	6EC01: Economics 1	6EC0101: Competitive Markets	Com 1	B1

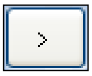
7. Click the **OK** button to display the **Send Student Exam Timetable Message** page. The pupil/student's exam timetable is attached to the message automatically.

More Information:
Sending a Pupil/Student Message on page *52*

Selecting Individual Pupil/Students

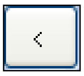
In the **Available Students** panel, highlight the pupil/students to whom you want to send exam timetables then click the **Select Single** button to move them to the **Selected Students** panel. All pupil/students can be moved by clicking the **Select All** button.

One or more pupil/students can be removed from the selected panel using the same selection method then clicking either the **Remove Single** or **Remove All** button.

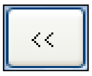


Select Single button

Select All button



Remove Single button



Remove All button

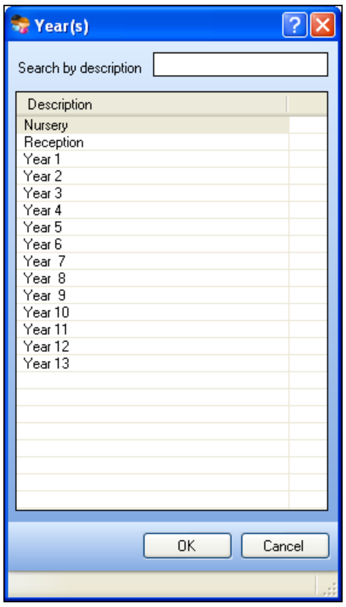
If many pupil/students are displayed, you may wish to search for the required person by entering the first few characters of their surname in the **Search by Name** field. Only the pupil/student(s) who match the search criteria entered are displayed on the screen as you type.

> *NOTE: Pupil/students can also be added using the filter buttons available on the right-hand side of the screen. Pupil/students can be filtered by year group, registration group and house.*

Selecting Pupil/Students of a Year Group

This filter enables you to select all pupil/students who are assigned to the selected year group(s).

1. Click the **Year(s)** button to display the **Year(s)** dialog.



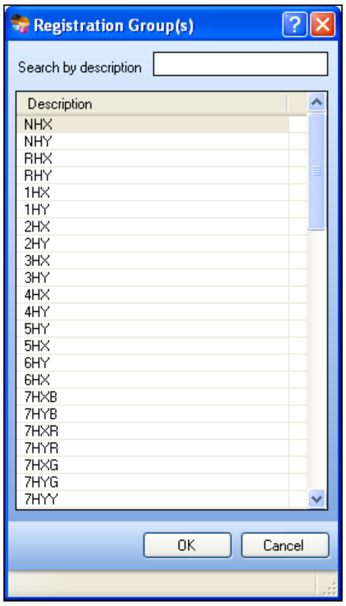
2. Highlight the required year group then click the **OK** button to confirm the selection.

   If you have a long list of year groups, you may wish to search for the required one by entering the first few characters of its description in the **Search by description** field. Any year groups matching the search criteria entered are filtered on the screen as you type.

Selecting Pupil/Students of a Registration Group

This filter enables you to select all pupil/students who are in the selected registration group(s).

1. Click the **Registration Group(s)** button to display the **Registration Group(s)** dialog.



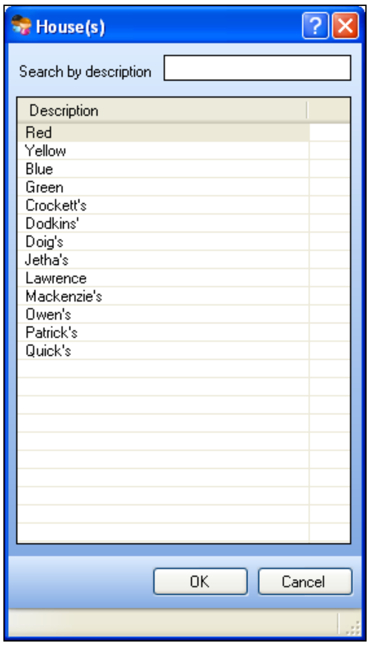
2. Highlight the required registration group then click the **OK** button to confirm the selection.

   If you have a long list of registration groups, you may wish to search for the required one by entering the first few characters of its description in the **Search by description** field. Any registration groups matching the search criteria entered are filtered on the screen as you type.

Selecting Pupil/Students of a House

This filter enables you to select all pupil/students who are assigned to the selected house.

1. Click the **House(s)** button to display the **House(s)** dialog.



2. Highlight the required house then click the **OK** button to confirm the selection.

   If you have a long list of houses, you may wish to search for the required one by entering the first few characters of the its description in the **Search by description** field. Any houses matching the search criteria entered are filtered on the screen as you type.

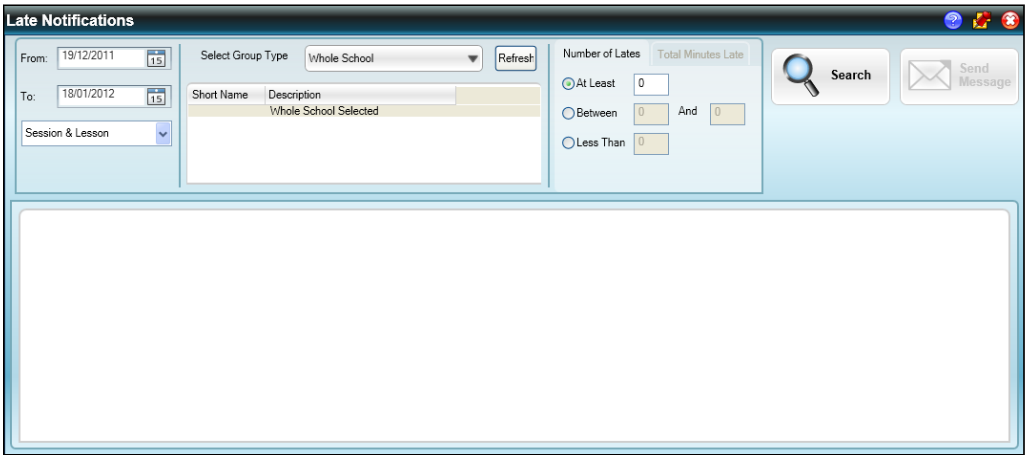
Sending a Message for Attendance Late Marks

If either an L (Late before registers close) or a U (Late after registers close) late code is recorded in a register for a pupil/student, a message of any type (email, mobile or SIMS internal message) can be sent to their InTouch contacts or key members of staff, enquiring why the pupil/student was late at a particular time. Key members of staff are defined as those who have an involvement with the pupil/student, e.g. their **Registration Tutor**, **Head of House** and/or **Head of Year**.

The message is sent to recipients according to the role options selected in the **Late Notification** panel of the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**). If the **InTouch Contact** role is selected, the default recipient is the pupil/student's highest priority contact(s).

WARNING: *The wider the search parameters entered on this screen (e.g. searching for late marks across the* ***Whole School*** *over the course of a month), the longer the search will take. To facilitate the search for late marks, you are strongly advised to search for smaller group sizes over a shorter date range.*

1. Select **Focus | Attendance** (or **Lesson Monitor**) **| Send Late Notifications** to display the **Late Notifications** page.

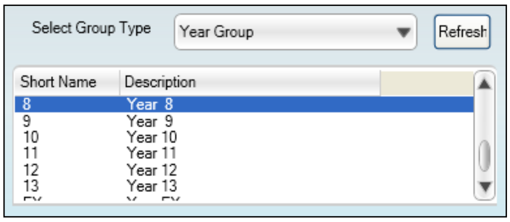


2. Select the date range over which you wish to gather attendance information by entering dates in the **From** and **To** fields, or by clicking the respective **Calendar** buttons then selecting the required dates. The dates entered must fall within a single academic year.

   The **From** date defaults to either the start date of the current academic year or one month ago, whichever is the most recent. The **To** date defaults to yesterday's date.

3. From the drop-down list, select whether you wish to deal with **Session & Lesson**, **Session** or **Lesson** attendance. The options available depend on whether the SIMS Lesson Monitor licence has been applied.

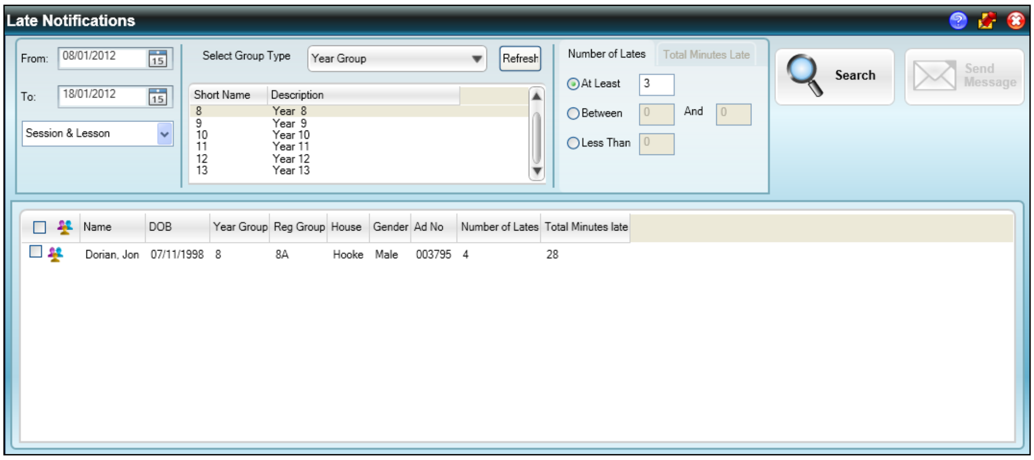
4. Select the scope from the **Select Group Type** drop-down list, e.g. **Whole School**, **Year Group**, etc. then click the **Refresh** button. The option selected determines the display of the following table.



5. Highlight the appropriate option(s) in the table to indicate the required group(s).
6. On the **Number of Lates** tab of the adjacent panel, select the number of late marks that must be accrued before a message will be sent. The options are:
    - **At Least** – selecting this option enables you to specify the minimum number of late marks that must be recorded for a pupil/student to be included. Enter the figure in the adjacent field.
    - **Between** – selecting this option enables you to specify the range of late marks that must be recorded for a pupil/student to be included. Enter the figures in the two adjacent fields.
    - **Less Than** – selecting this option enables you to specify a number of late marks, with any pupil/students falling below this number being included. Enter the figure in the adjacent field.
7. On the **Total Minutes Late** tab, enter in the **At Least** field the minimum, cumulative number of minutes a pupil/student must have been late (over the selected date range) that must be recorded for them to be included.

> ***IMPORTANT NOTE:*** *Entering figures on both the* ***Number of Lates*** *and* ***Total Minutes Late*** *tabs will search for pupil/students who match all of the criteria entered.*

8. Click the **Search** button to display in the panel at the bottom of the page, all pupil/students who match the search criteria entered.



9. Select the check box of each pupil/student for whom you wish to send a message. Alternatively, select the check box in the column header to select all pupil/students displayed in the list.
10. Click the **Send Message** button to display the **Send Late Notification Message** page.

More Information:
Sending a Pupil/Student Message on page *52*

Sending an Alert Regarding Incomplete Marksheet Results

You can send a message to members of staff, reminding them that they have not yet completed the entering of results in a SIMS Assessment marksheet. This functionality can be used for any marksheet where results are due.

Missing marksheet alerts can be sent by email or SIMS internal message only. If the preferred method of communication for a member of staff is set to SMS messaging, both an email and a SIMS internal message will be sent. For all users who have specified either email or SIMS internal message, the message will be conveyed to them in their preferred format.

> ***WARNING:*** *The messages are sent to all the owners of marksheets specified in the alert. Messages are sent for information purposes only so the recipient is advised not to reply to the message (this advice is included as part of the message text if you are using the system template, where this text is included by default). If you reply to an alert message, the reply is sent to the user who triggered the message and not necessarily the user who set up the alert.*

> ***IMPORTANT NOTE:*** *Missing marksheet alerts generated after 9pm will be queued, and sent the next morning at 7am. This is to avoid messages being sent during unsociable hours.*

The intended recipients of the alert are calculated when the alert date is reached. The messages produced are sent to the marksheet owner. If a marksheet selected in an alert has no owner, a message will not be sent.

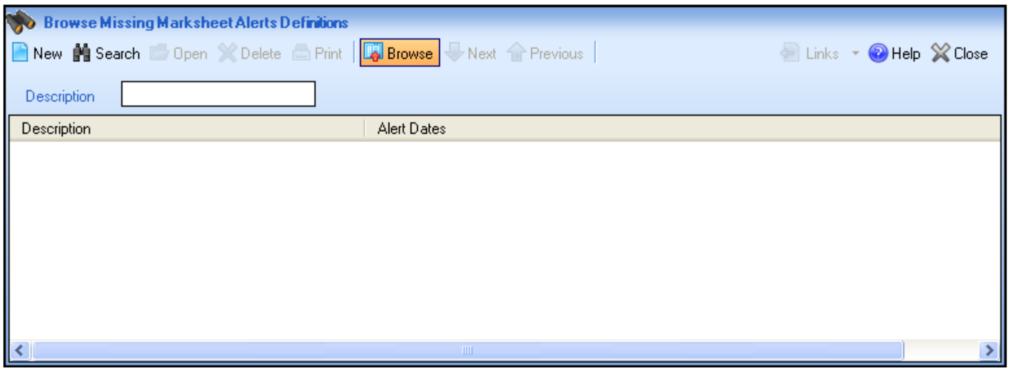
Alert definitions can be set up for the next academic year. If you choose to do this, please be aware that in the time between now and when the alert is due to be sent, group memberships and the content of marksheets may change.

Additional Resources:

For information on ascertaining whether staff members have completed the entry of results in all their marksheets, please refer to *Missing Results Report* in the *Individual Reports* chapter of the *Reporting and Additional Functions in Assessment* handbook.

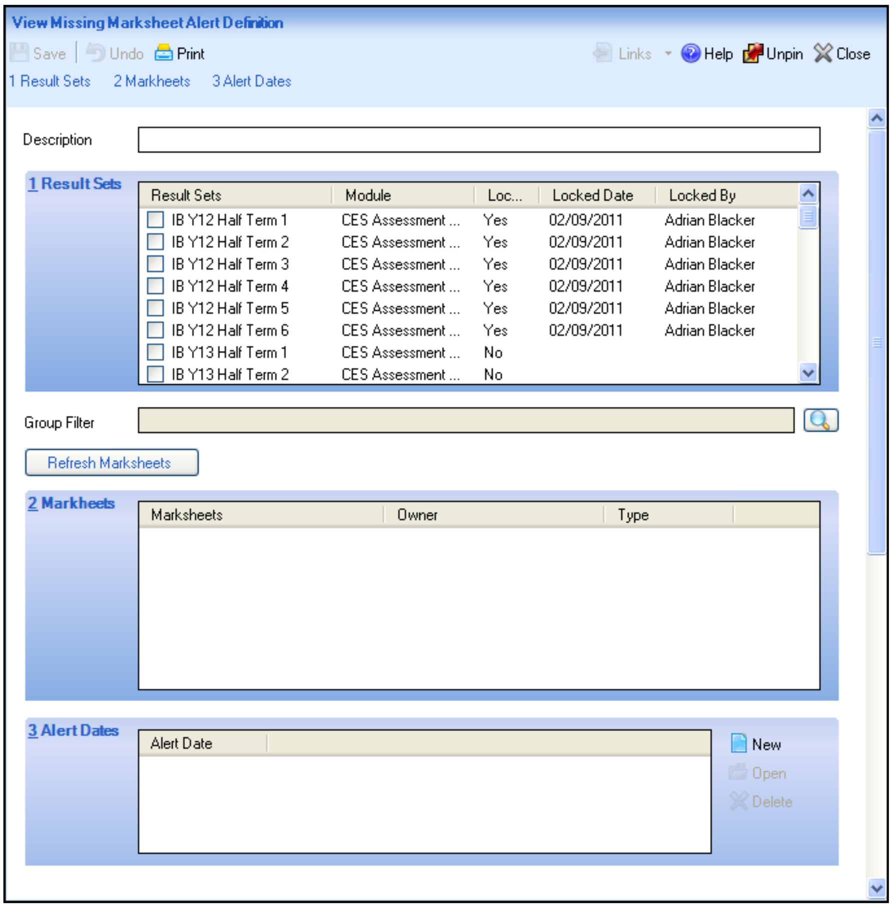
> ***WARNING:*** *Selecting a large number of result sets may return a large number of marksheets, leading to a reduction in performance of your SIMS system. If you wish to send reminders about a large number of results, you are strongly advised to create multiple alert definitions with each definition dealing with a small number of result sets.*

1. Select **Tools | InTouch | Missing Marksheets Alerts Setup** to display the **Browse Missing Marksheet Alerts Definitions** browser.



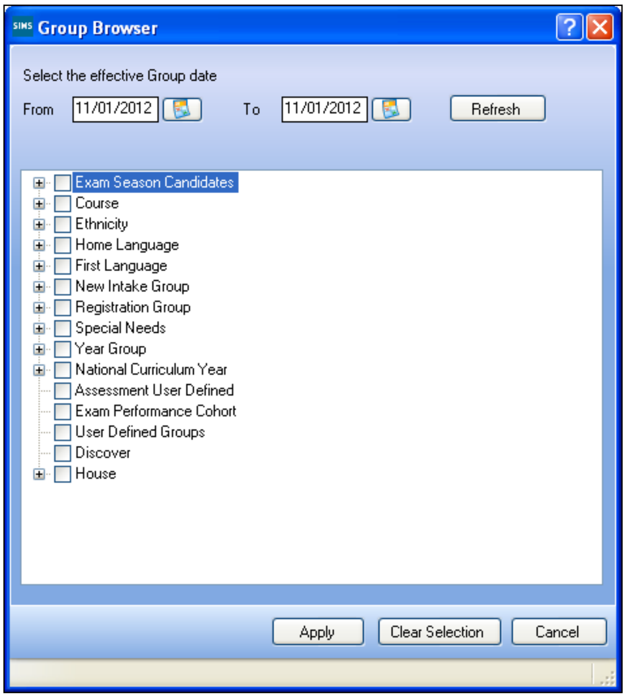
2. Search for an existing alert definition by entering a **Description** then clicking the **Search** button to display all definitions that enter the search criteria entered. Click the **Search** button without entering any criteria to display all alert definitions.

   Alternatively, click the **New** button to display the **View Missing Marksheet Alert Definition** page, which is used to create a new alert definition.



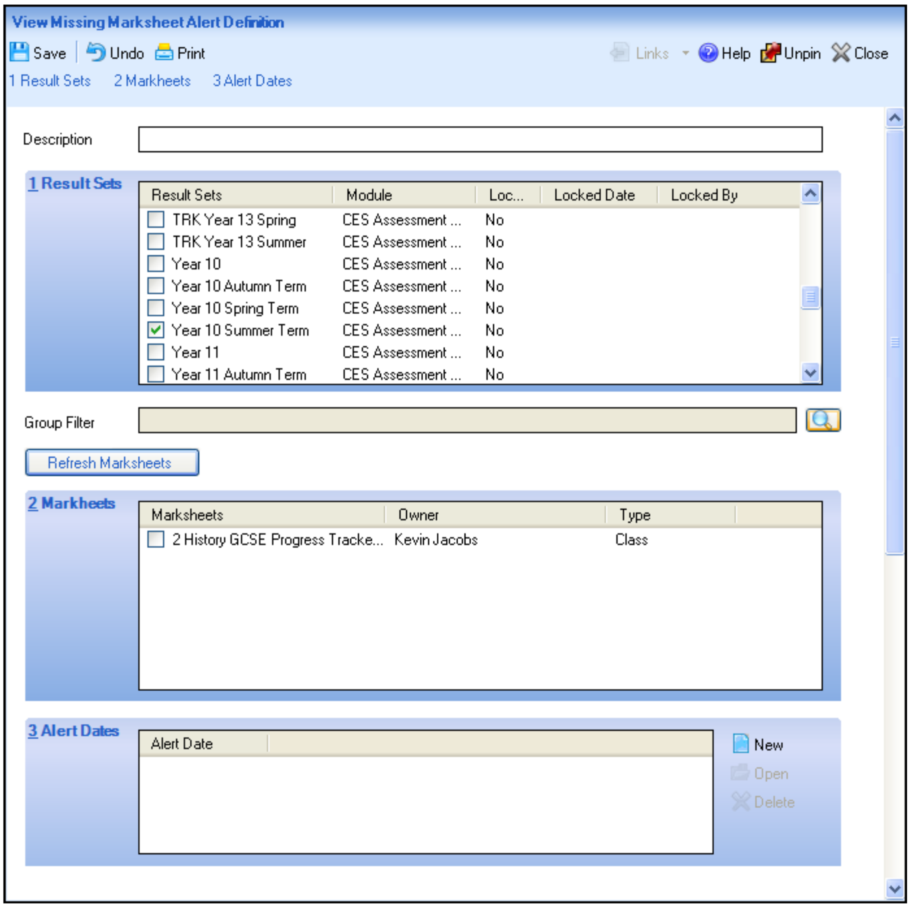
3. Enter a **Description** for the definition.

4. In the **Result Sets** panel, select the check box adjacent to the **Result Sets** associated with the marksheets for which you want to set up the alert.
5. Click the **Browser** button adjacent to the **Group Filter** field to display the **Group Browser** dialog, if required, to further filter the marksheets that will be returned.

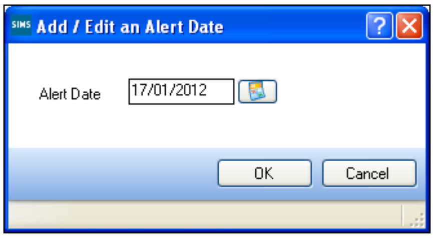


6. Click the **Apply** button to return to the **View Missing Marksheet Alert Definition** page, where the selected **Group Filter** (if selected) is displayed.

7. Click the **Refresh Marksheets** button to display in the **Marksheets** panel, all marksheets associated with the selected **Result Sets** and the **Group Filter** (if selected).

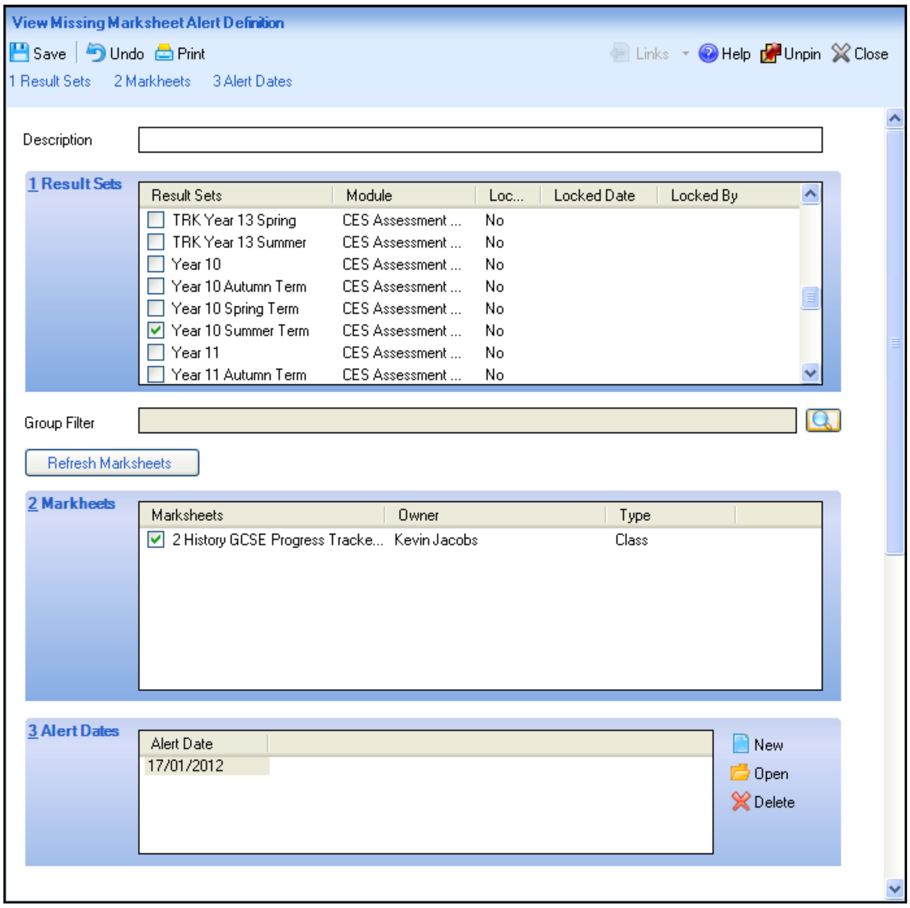


8. In the **Marksheets** panel, select the check box adjacent to the marksheet(s) for which you want to send the alert.
9. Set the date on which you want to send the alert by clicking the **New** button to display the **Add/Edit an Alert Date** dialog.



10. Enter the **Alert Date**, or click the **Calendar** button then select the required date.

11. Click the **OK** button to return to the **View Missing Marksheet Alert Definition** page, where the **Alert Date** is displayed.



12. Click the **Save** button to save the alert definition.

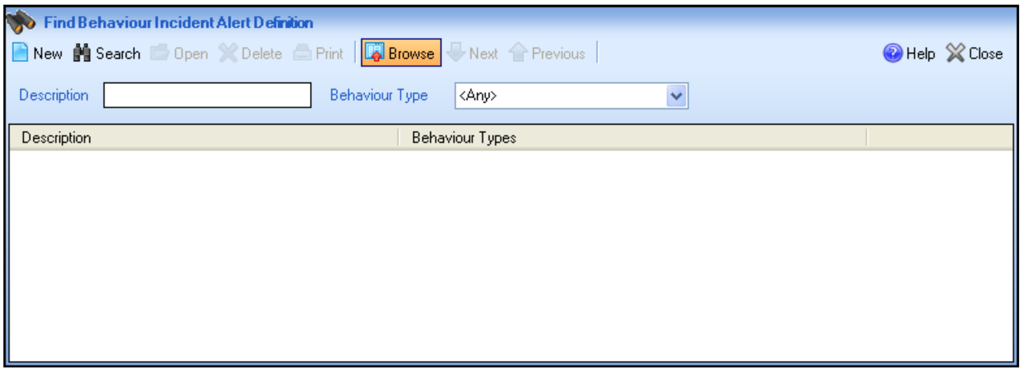
On the date of the alert, an email or SIMS internal message (or both, where the intended recipient has recorded SMS message as their preferred method of communication) is sent to the owner of the marksheet.

Sending an Alert to Designated Persons if a Behaviour Type is Recorded

An automated message of any type (email, mobile or SIMS internal message) can be sent to key members of staff, and/or to any specified employee, as soon as an incident associated with a particular behaviour type is recorded in SIMS (e.g. from Take Register), to assist with the efficient monitoring of behaviour at your school. Key members of staff are defined as those who have an involvement with the pupil/student, e.g. their **Registration Tutor**, **Head of House** and/or **Head of Year**.

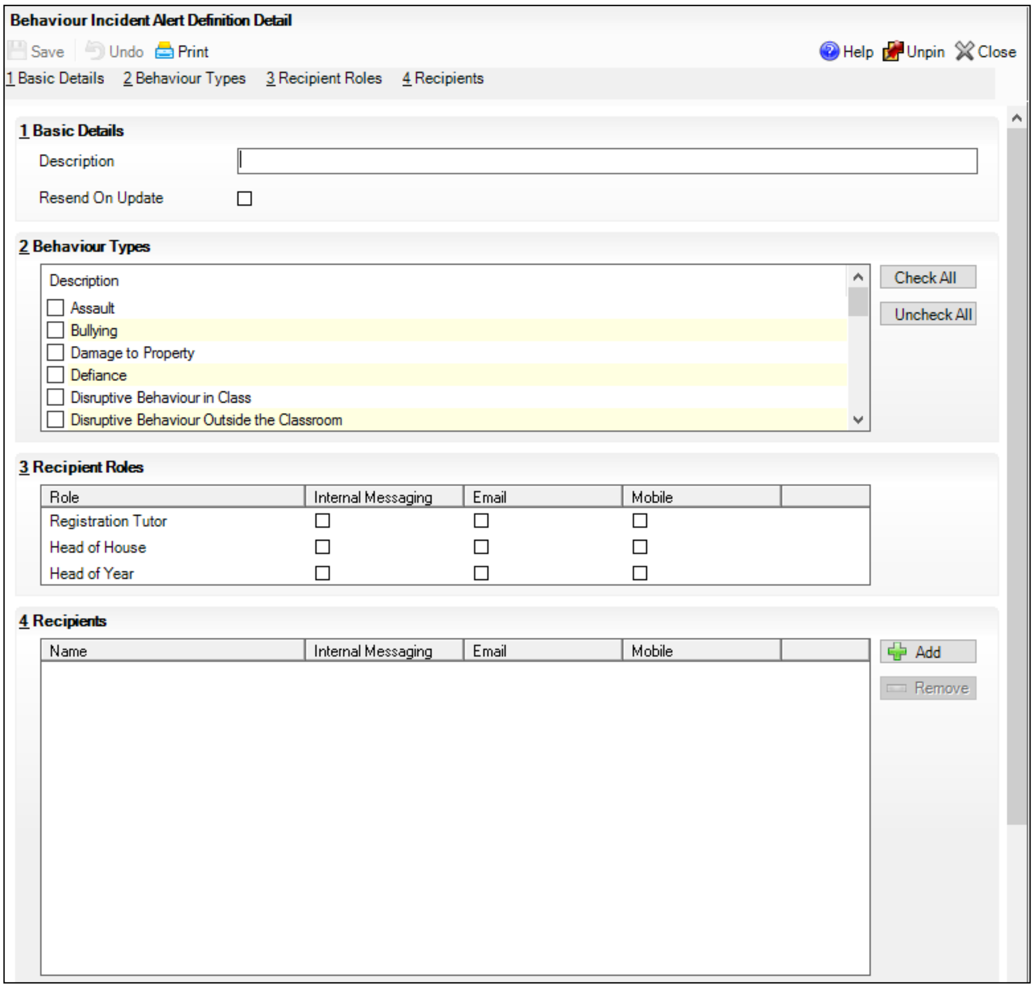
Only behaviour incidents where pupil/student details have been recorded can trigger the sending of this message.

1. Select **Tools | InTouch | Behaviour Incident Alerts Setup** to display the **Find Behaviour Incident Alert Definition** browser.



2. Search for an existing alert definition by entering a **Description** and/or selecting the associated **Behaviour Type** from the drop-down list, then clicking the **Search** button to display all definitions that match the search criteria entered. Click the **Search** button without entering any criteria to display all alert definitions.

   Alternatively, click the **New** button to display the **Behaviour Incident Alert Definition Detail** page, which is used to create a new alert definition.



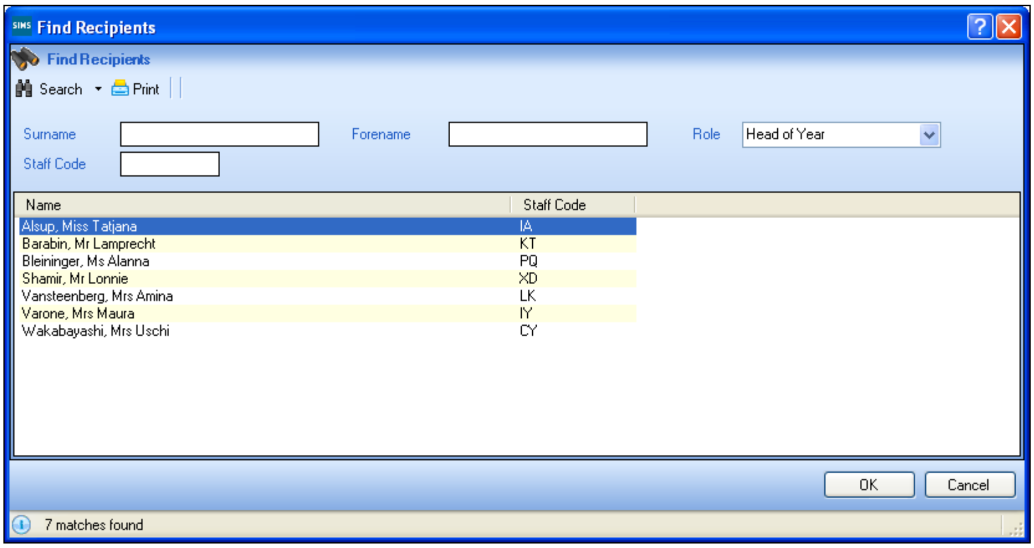
3. In the **Basic Details** panel, enter a **Description** for the definition.
4. If you wish to send another message to the intended recipients when the behaviour incident record is updated, select the **Resend On Update** check box. This would be particularly useful if you later record additional pupil/students as being involved in the incident as it may broaden the number of staff members who are made aware of the incident.
5. In the **Behaviour Types** panel, select the behaviour types for which you want to send an alert message by selecting the appropriate check boxes. Select all behaviour types by clicking the **Check All** button. If you make a mistake, all check boxes can be deselected by clicking the **Uncheck All** button.

> *NOTES: Only behaviour types whose status is set to Active (via **Tools | Setups | Behaviour Management | Behaviour Type**) are available for selection. If a behaviour type is set to **Inactive** after the alert definition has been set up, the behaviour will be removed from the definition automatically.*
>
> *For incidents involving bullying, only the **Bullying** behaviour type can be added to the alert definition. The bullying roles are not available for selection.*

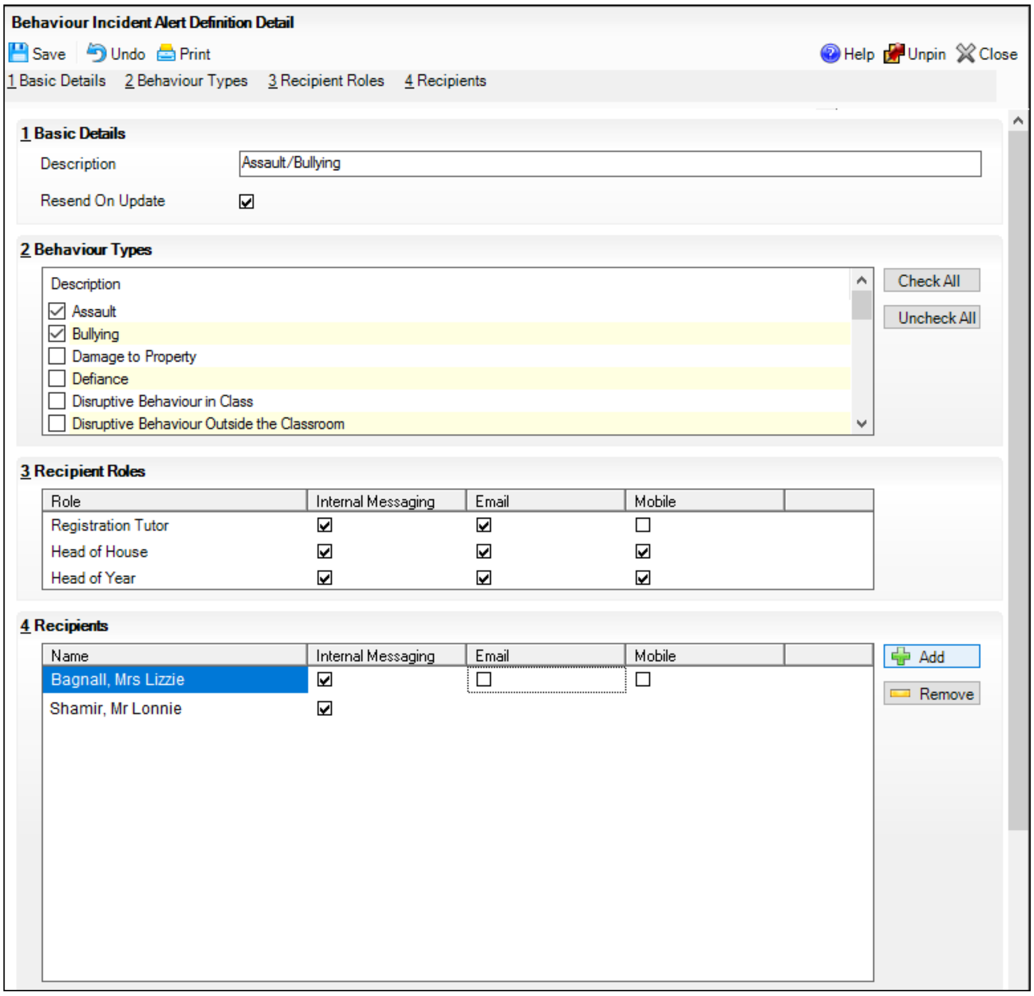
6. In the **Recipient Roles** panel, for each type of intended recipient to whom you wish to send an alert (**Registration Tutor**, **Head of House** and/or **Head of Year**) select the check box(es) that indicate the required method of communication for this alert.

> ***WARNING:** If a member of staff is set up to receive behaviour alerts but then their email address or mobile phone number changes from being Primary, they will not receive an alert. If any changes are made to the staff member's Primary contact method, you will have to reconfigure the alert accordingly.*

7. To select recipients by name rather than by role, click the **Add** button in the **Recipients** panel to display the **Find Recipients** browser.



8. Enter either all or part of their **Surname**, **Forename** or **Staff Code** (if known). To search for a member of staff by **Role**, select from the drop-down list.
9. Click the **Search** button to list all members of staff who match the search criteria specified.
10. Highlight the required member(s) of staff. Use **Ctrl + click** or **Shift + click** to select multiple people.
11. Click the **OK** button to return to the **Behaviour Incident Alert Definition Detail** page, where the intended recipients are displayed in the **Recipients** panel.



12. Select the check box relating to the communication method(s) you wish to use for this message. Check boxes are selected by default according to the options defined in the **General** panel of the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
13. Intended recipients can be removed from the alert definition by highlighting their name then clicking the **Remove** button.
14. Click the **Save** button to save the alert definition.

When a behaviour incident relating to a behaviour type that has been defined in the alert definition is recorded in SIMS, reminder messages are sent to the intended recipients.

Sending an Alert Regarding Pupil/Student Exam Attendance

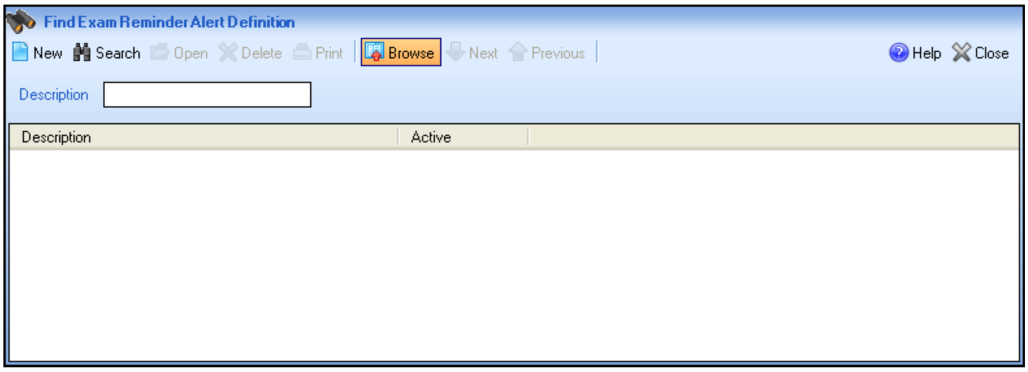
You can send an SMS or email message to internal examination candidates who are scheduled for an exam, reminding them of a forthcoming examination. The message can also be sent to any linked person marked as a Priority 1 contact, if required.

WARNING: *The messages are sent to all the recipients specified in the alert. Messages are sent for information purposes only so the recipient is advised not to reply to the message (this advice is included as part of the message text if you are using the system template, where this text is included by default). If you reply to an alert message, the reply is sent to the user who triggered the message and not necessarily the user who set up the alert.*

IMPORTANT NOTES: *Exam attendance alerts generated after 9pm will be queued, and sent the next morning at 7am. This is to avoid messages being sent during unsociable hours.*

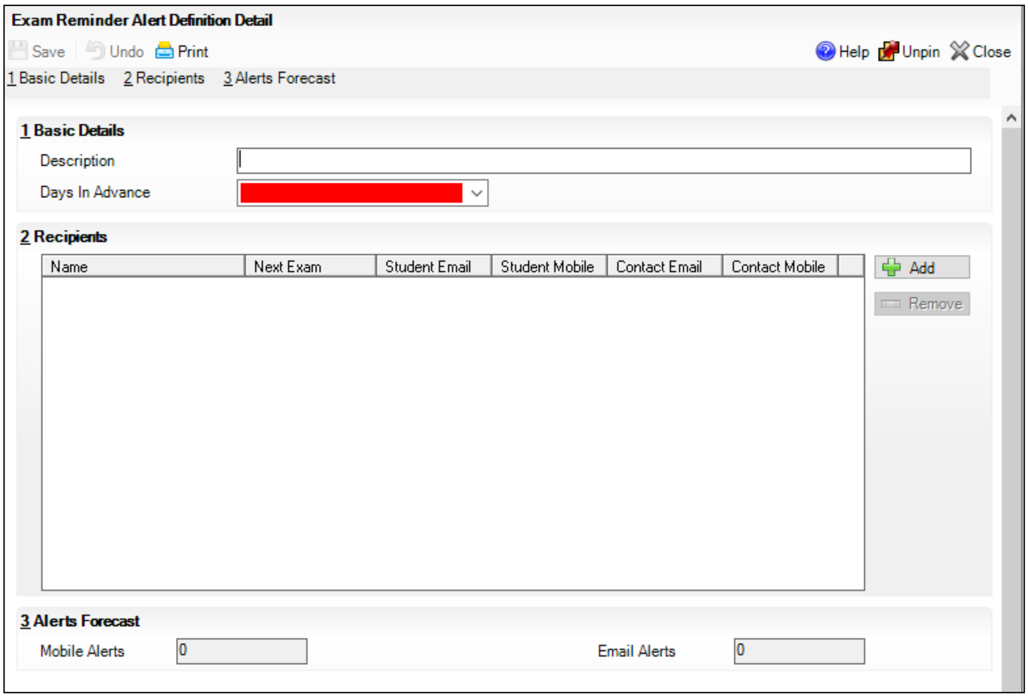
Each exam reminder alert definition will run only once for any given date. If you want to send two reminders, one of which is seven days in advance and the other is two days in advance of the exam, you will need to create two alert definitions.

1. Select **Tools | InTouch | Exam Reminder Alerts Setup** to display the **Find Exam Reminder Alert Definition** browser.

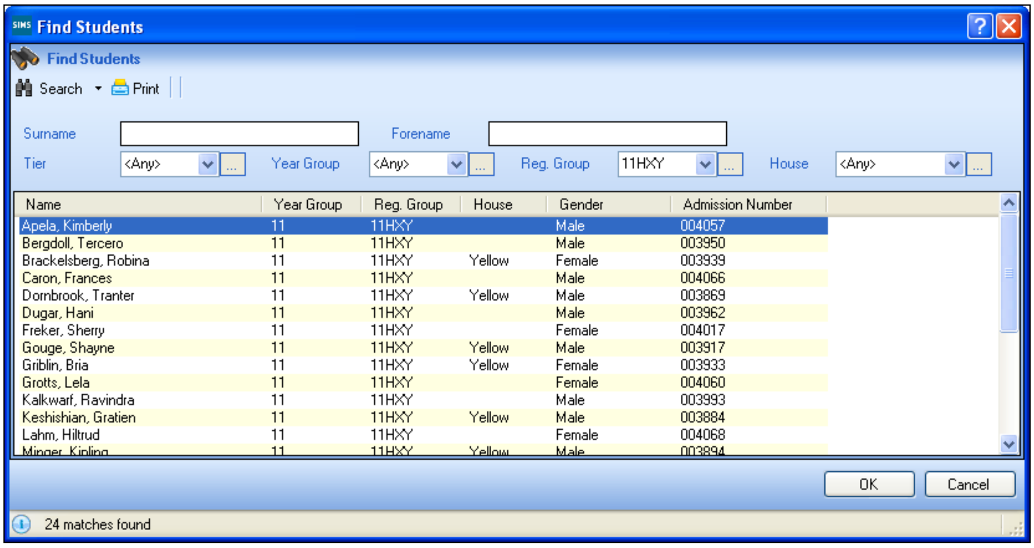


2. Search for an existing alert definition by entering a **Description** then clicking the **Search** button to display all definitions that enter the search criteria entered. Click the **Search** button without entering any criteria to display all alert definitions.

Alternatively, click the **New** button to display the **Exam Reminder Alert Definition Detail** page, which is used to create a new alert definition.

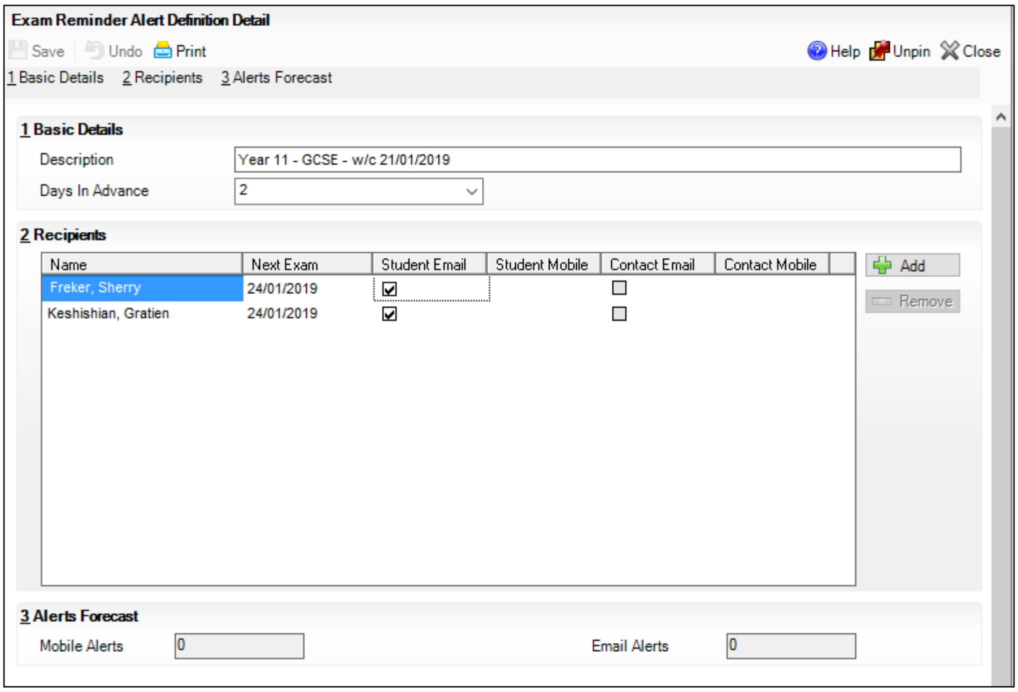


3. In the **Basic Details** panel, enter a **Description** for the definition.
4. From the drop-down list, select the number of **Days In Advance** of the examination (up to seven, including Saturday and Sunday) that you want the reminder to be sent.
5. Select the intended **Recipients** of the reminder by clicking the **Add** button to display the **Find Students** dialog.



The pupil/students available for selection are those with an examination scheduled today or at any point in the future, including in future academic years.

6. Enter either all or part of the pupil/student **Surname** and/or **Forename**.
7. Select applicable values from the various drop-down lists to further restrict the list of pupil/students returned.
8. Click the **Search** button to list all pupil/students who match the search criteria specified.
9. Highlight the required pupil/student(s). Use **Ctrl + click** or **Shift + click** to select multiple pupil/students.
10. Click the **OK** button to return to the **Exam Reminder Alert Definition** page, where the intended recipients are displayed in the **Recipients** panel.



11. Select the check box relating to the communication method(s) you wish to use for this message. The presence of the **Student Email**, **Student Mobile**, **Contact Email** and **Contact Mobile** check boxes are determined by the data stored against the appropriate person. Check boxes are selected by default according to the options defined in the **Exam Reminder** panel of the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
12. Intended recipients can be removed from the alert definition by highlighting their name then clicking the **Remove** button.
13. The **Alerts Forecast** panel provides information on the <u>total</u> number of **Mobile Alerts** and **Email Alerts** that will be sent when the reminder message is sent. In the previous example, only two **Student Email** messages will be sent so the **Email Alerts** field displays 2.

> *NOTE: Please note that the* ***Alerts Forecast*** *assumes that only one SMS, or push notification, if applicable, is required to send each message.*

14. Click the **Save** button to save the alert definition.

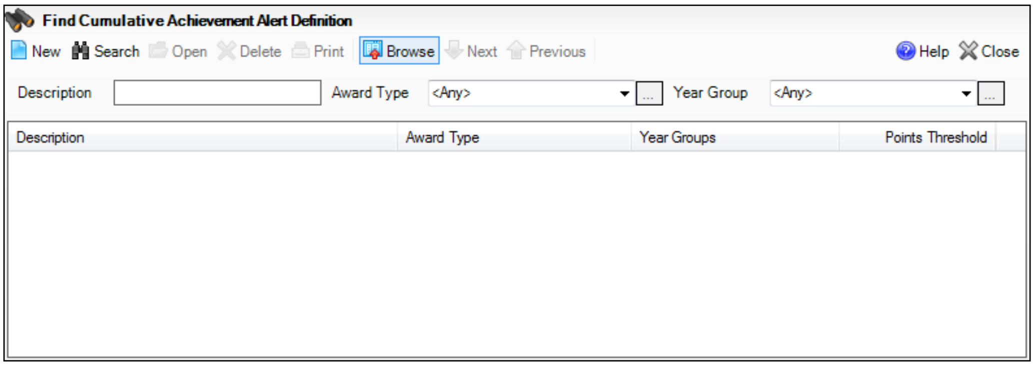
On the date of the alert, reminder emails and mobile messages are sent to the intended recipients.

Sending an Alert Regarding Cumulative Achievements

WARNING: *It is strongly recommended to set up alerts for Cumulative Achievements <u>at the beginning of the academic year</u>. If you set up these alerts during the academic year, SIMS will send alerts for any students who already achieved the **Points Threshold**.*

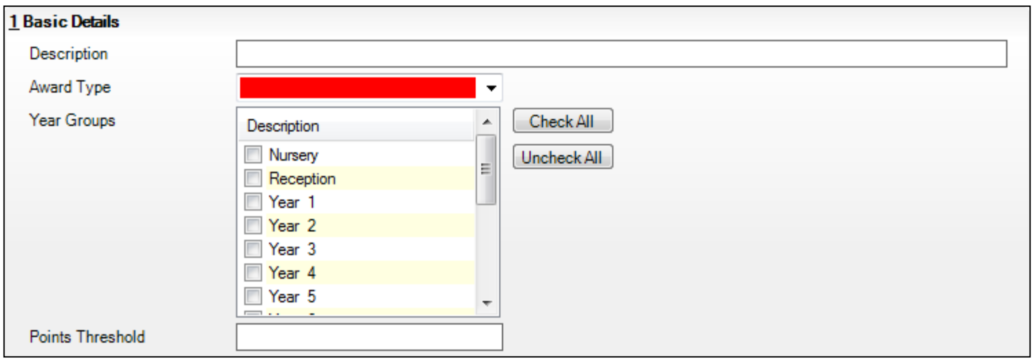
You can send a mobile or email message to pupil/students regarding their cumulative achievements. The message can also be sent to any linked person marked as a Priority 1 contact, if required, together with school contacts.

1. Select **Tools | InTouch | Cumulative Achievement Alerts Setup** to display the **Find Cumulative Achievement Alert Definition** browser.



2. Search for an existing alert definition by entering a **Description**, selecting an **Award Type** and/or selecting a **Year Group** then clicking the **Search** button to display all definitions that enter the search criteria entered. Click the **Search** button without entering any criteria to display all alert definitions. Highlight the required definition then click the **Open** button to display the **Cumulative Achievement Alert Definition Detail** page.

   Alternatively, click the **New** button to display the **Cumulative Achievement Alert Definition Detail** page, which is used to create a new alert definition.



3. In the **Basic Details** panel, enter a **Description** for the definition.

4. Select the **Award Type** you wish to associate with the definition from the drop-down list.
5. Select the check box adjacent to the **Year Groups** for which you want to send the alert.
6. Enter the **Points Threshold** for the definition. This is the number of points a pupil/student must achieve to be granted an award.
7. Click the **Save** button to save the alert definition.

   When a pupil/student in the selected year group achieves the number of points defined in the alert definition, a message of the defined type is sent to the intended recipient(s).

Sending an Examination Result Message

You can send an email message to examination candidates, containing their exam results. The message can also be sent to any InTouch contact, together with their Head of House, Head of Year and Registration Tutor.

This report is produced to review the results, or view the forecast of results, for each candidate. The report includes information such as the **Board**, **Level**, **Element Code**, **Title** and **Grd1**.

The process of sending an examination result message consists of two parts:

- Defining the recipients of the message (please see *Defining the Recipients of Exam Result Messages* on page *140*).
- Sending the message to the recipients (please see *Sending Examination Results to Pupil/Students* on page *144*).

Defining the Recipients of Exam Result Messages

To assist with the timely distribution of examination results, an email message containing as an attachment a candidate's examination results can be sent to pupil/students once results have been processed in Examinations Organiser. To use this functionality, an email address must be recorded in the pupil/student's record, as well as in the record of other designated persons.

If an embargo date for the examination season has been defined in Examination Organiser, emails can be sent only after this date has passed. The message sent resembles the Candidate Statement of Result, as produced by Examinations Organiser.

> ***WARNING:*** *If an embargo has not been set up for the exam season, exam results can be sent at any time. However the sending of exam results should be carried out on the stated date only. If you are in any doubt as to whether exam results should be sent, you are strongly advised to set up the exam results definition only on the date you intend to release the results. Alternatively, you are advised to set up an embargo so that exam results cannot be distributed prematurely.*

Additional Resources:

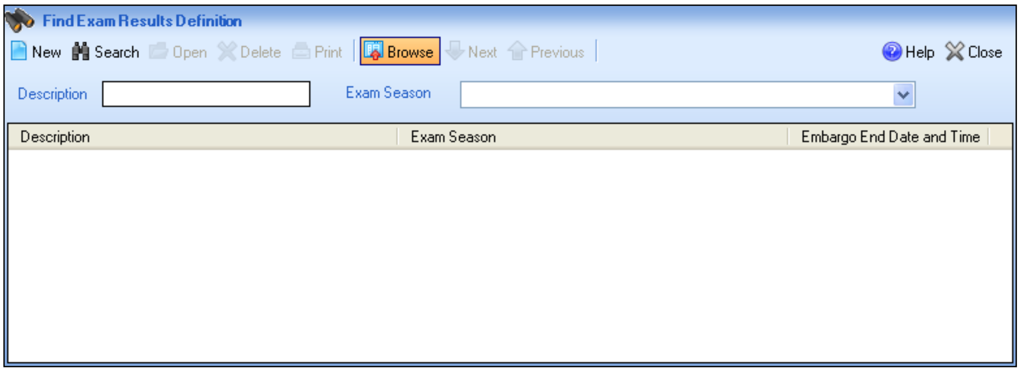
For more information on setting an embargo for an exam season, please refer to *Setting Up the Results Embargo for Results Download Days* in the *Setting up Examinations Organiser* chapter of the *Preparing Examinations Organiser for an Exams Season* handbook

Before email messages can be sent, you must determine the candidates to whom you wish to send results. The candidate selection process can be carried out at any time prior to the intended sending of examination results. The candidate selection process can be used to exclude particular candidates from the mailing list.

Once the exam season has been selected and the intended recipients have been selected, exam result email messages can be sent (please see *Sending Examination Results to Pupil/Students* on page *144*).

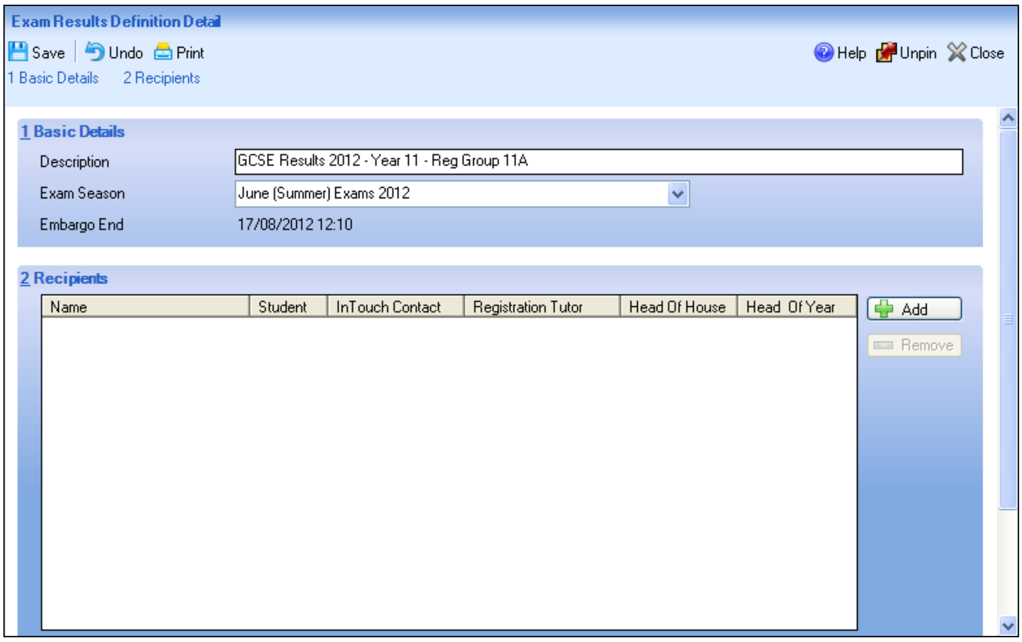
WARNING: *Selecting a large number of recipients in a single exam result definition may lead to a reduction in performance of your SIMS system. If you wish to send messages to a large number of students, you are strongly advised to create multiple exam result definitions, with each definition dealing with a small number of students, e.g. by year group, registration group, subject, etc.*

1. Select **Tools | InTouch | Exam Results Setup** to display the **Find Exam Results Definition** browser.



2. Search for an existing result definition by entering a **Description** and/or selecting the associated **Exam Season** from the drop-down list, then clicking the **Search** button to display all definitions that match the search criteria entered. Click the **Search** button without entering any criteria to display all alert definitions.

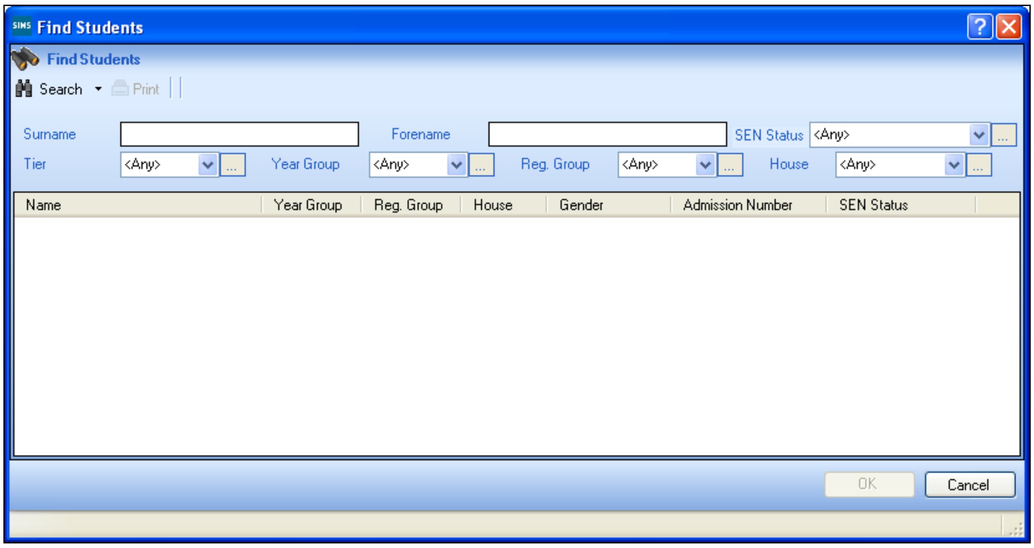
Alternatively, click the **New** button to display the **Exam Results Definition Detail** page, which is used to create a new definition.



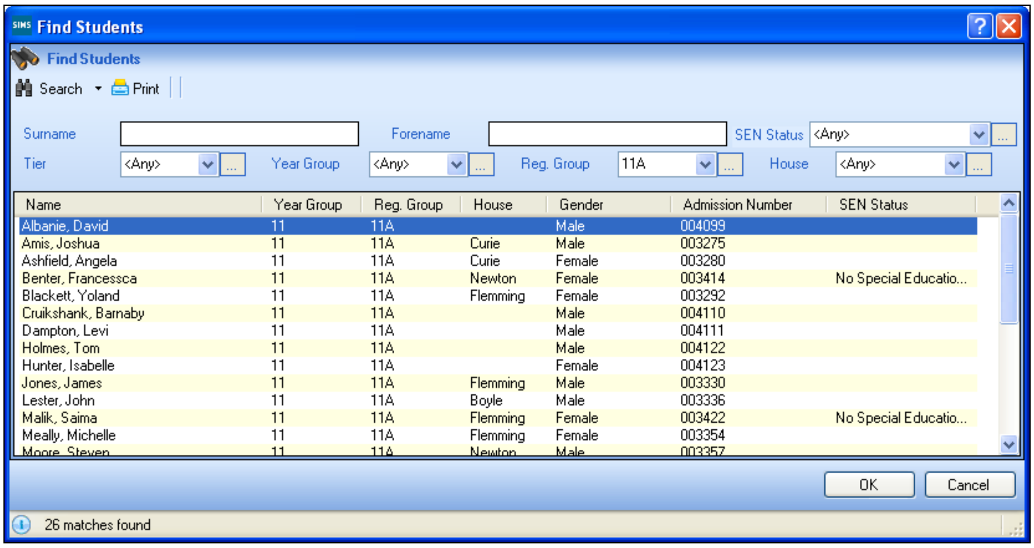
3. In the **Basic Details** panel, enter a **Description** for the definition.
4. Select the **Exam Season** for the definition from the drop-down list. The **Exam Season** displayed is the default season set in Examinations Organiser but can be changed to any other exam season in the current academic year or the previous exam season, if the current academic year has no exam seasons. If an embargo has been set up for the selected season, the **Embargo End** date is displayed.

> *NOTE: If an embargo has been set up for the selected season, messages that contain exam results cannot be sent until this date is reached.*

5. To select the intended recipients, click the **Add** button in the **Recipients** panel to display the **Find Students** browser.

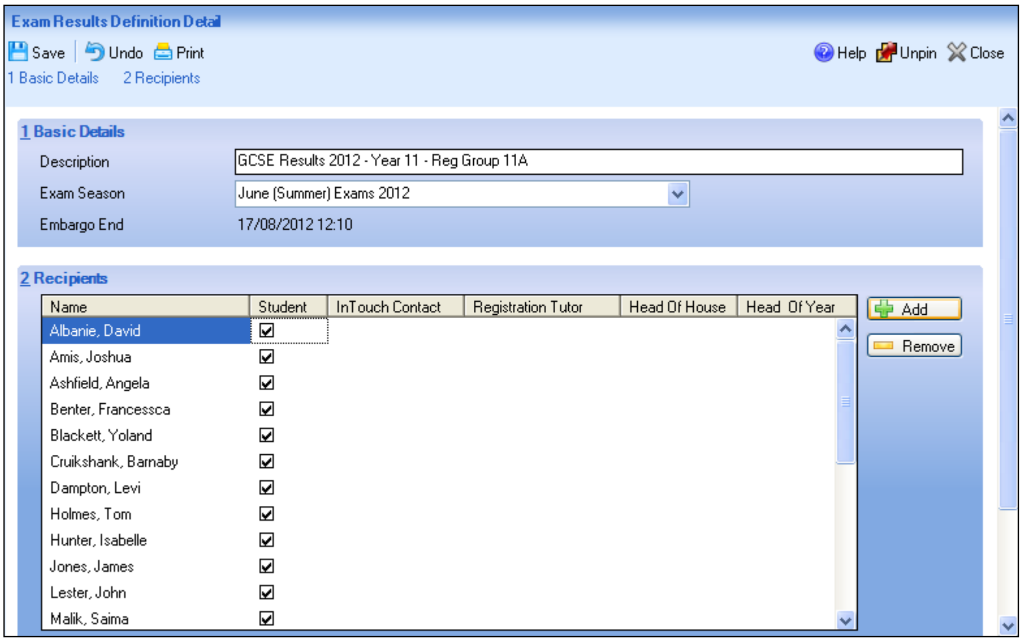


6. Enter either all or part of their **Surname** or **Forename**.
7. Select applicable values from the various drop-down lists to further restrict the list of pupil/students returned.
8. Click the **Search** button to list all students who are scheduled to sit an exam in the selected exam season and have an exam entry.



9. Highlight the required student(s). Use **Ctrl + click** or **Shift + click** to select multiple pupil/students.

10. Click the **OK** button to return to the **Exam Results Definition Detail** page, where the intended recipients are displayed in the **Recipients** panel.



11. Select the check box relating to the communication method(s) you wish to use for this message. Check boxes are selected by default according to the options defined in the **General** panel of the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
12. Intended recipients can be removed from the definition by highlighting their name then clicking the **Remove** button.
13. Click the **Save** button to save the alert definition.
14. Email messages containing exam results for the selected recipients for the selected exam season can now be sent to the selected recipients (please see *Sending Examination Results to Pupil/Students* on page *144*). However if an embargo has been set for the exam season, it will be possible to send exam result messages only when the embargo date has past.

More Information:
Sending Examination Results to Pupil/Students on page *144*

Sending Examination Results to Pupil/Students

You can send an email message to examination candidates, containing their exam results. The message can also be sent to any InTouch contact, together with their Head of House, Head of Year and Registration Tutor. To send exam results, it is first necessary to create an exam results definition (please see *Defining the Recipients of Exam Result Messages* on page *140*).

This report is produced to review the results, or view the forecast of results, for each candidate. The report includes information such as the **Board**, **Level**, **Element Code**, **Title** and **Grd1**.

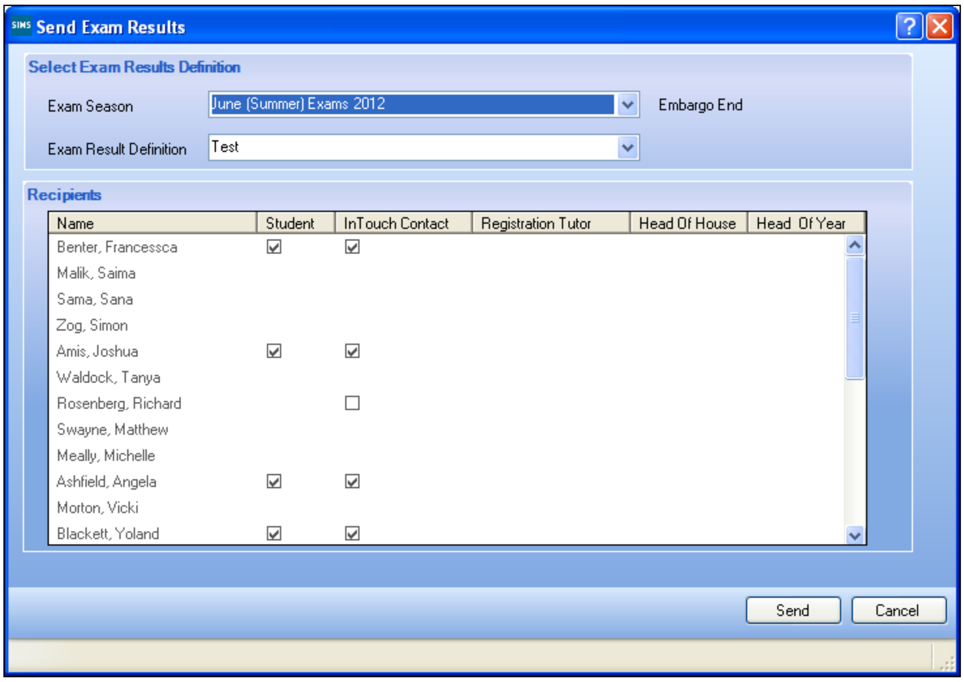
IMPORTANT NOTES: *Only the overall grade is displayed on the report, in the* ***Grd1*** *column. Modular marks and certification details will* *<u>not</u>* *be displayed. If a student is continuing to study for their exams and there are interim results that are graded, these will be displayed in the* ***Grd1*** *column.*

The student's UCI and ULN are *<u>not</u>* *included in the report output.*

If an embargo has been set up for the selected exam season, the ***Send*** *button will be disabled until the embargo has expired.*

WARNING: *If an embargo has not been set up for the exam season, exam results can be sent at any time. However the sending of exam results should be carried out on the stated date* *<u>only</u>*. *If you are in any doubt as to whether exam results should be sent, you are* *<u>strongly advised</u>* *to set up the exam results definition only on the date you intend to release the results. Alternatively, you are advised to set up an embargo so that exam results cannot be distributed prematurely.*

1. Select **Reports | Exams | Send Exam Results** to display the **Send Exam Results** dialog.



2. Select the **Exam Season** for which you want to send exam results from the drop-down list. This defaults to the season marked as **Current** in Examinations Organiser but the previous or future exam season can be selected.
3. Select the required **Exam Result Definition** from the drop-down list. If only one result definition has been created in SIMS, its name is displayed automatically in this field.

   If an embargo has been set up for the selected exam season, the **Embargo End** date is displayed.

4. Selecting an exam definition populates the **Recipients** panel with the names of the exam candidates associated with the definition. Details of the pupil/students and their associated contacts who will also receive a copy of the exam results are displayed (**Student**, **InTouch Contact**, **Registration Tutor**, etc.).

   A tick in a column indicates the intended recipient of an exam result message.
5. Click the **Send** button to send the messages to the selected recipients.

6. Click the **OK** button.
7. Click the **Cancel** button to complete the process.

More Information:
Defining the Recipients of Exam Result Messages on page *140*
Setting Default Communication Methods on page *176*

Sending an Attendance Letter Message

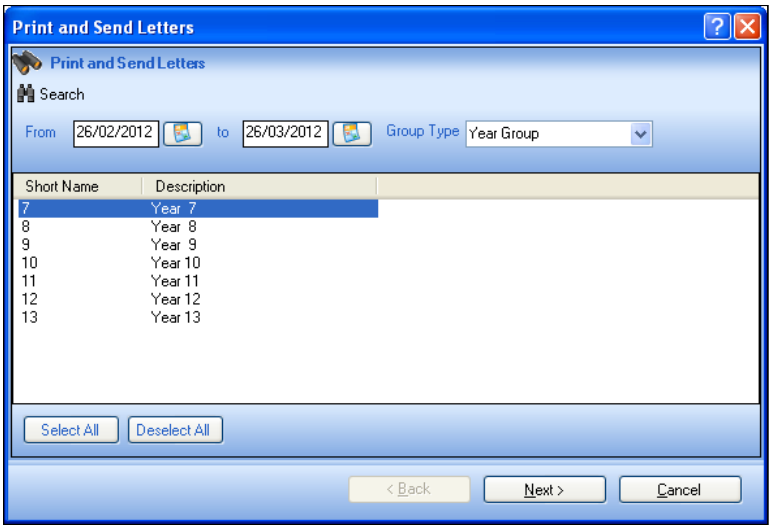
To assist with the timely distribution of letters to parent/guardians regarding a pupil/student's attendance, an email message containing as an attachment their child's attendance letter can be sent. The recipient(s) of the letter will be those defined in the **Attendance Letter** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).

Prior to sending attendance letters via email, letter definitions must be set up (via **Tools | Setups | Attendance Setup | Letter Definition**). For more information on defining letter templates, and the types of letters that can be defined, please refer to the *Producing Standard Attendance Letters* chapter in either the *Managing Pupil/Student Attendance* handbook or the *Monitoring Session and Lesson Attendance* handbook.

The process of producing the attendance letters is similar to the existing functionality in SIMS Attendance/Lesson Monitor, with an additional option available to send the letter via email.

NOTE: Users with the permissions to print attendance letters can also send letters via email.

1. Select **Reports | Attendance** (or **Lesson Monitor**) **| Letters | Print and Send Letters** to display the **Print and Send Letters** wizard.



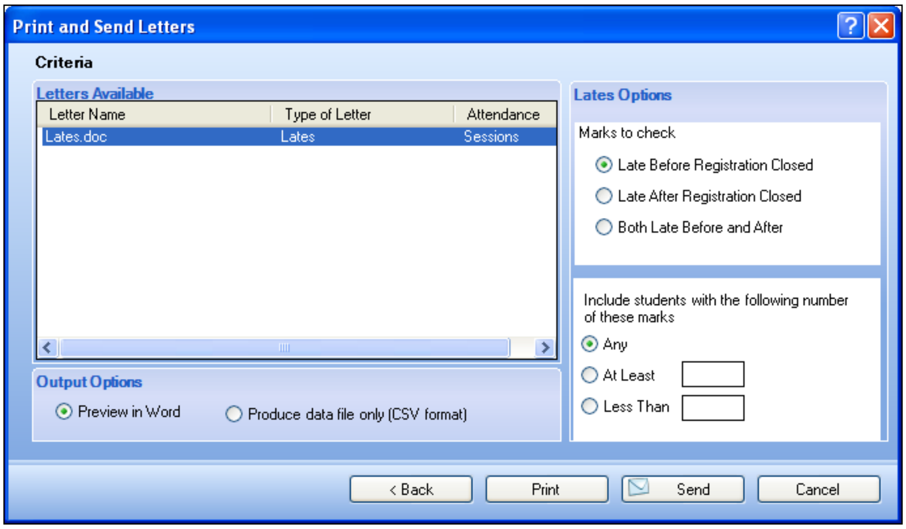
2. A default date range of from one month ago yesterday (**From**), to yesterday (**To**) is displayed. If a different date range is required, enter the appropriate dates in the **From** and **to** fields or click the **Calendar** buttons and select the required dates.

Calendar button

> *NOTE: The dates in the **From** and **to** fields <u>must</u> fall within the same academic year.*

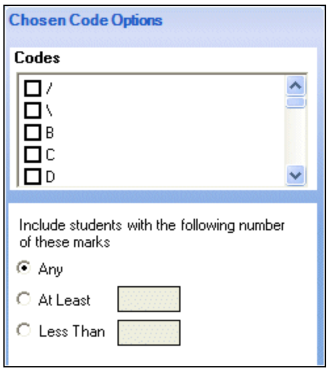
3. By default, the **Group Type** is displayed as **Year Group**. If a different **Group Type** is required, select the required group from the drop-down list then click the **Search** button to refresh the display.
4. Highlight the required group name(s) then click the **Next** button to display the **Criteria** page.

To select more than one group, hold down the **Ctrl** key and click the required group names to highlight them. The **Select All** button and **Deselect All** button (located at the bottom left-hand side of the **Print and Send Letters** wizard) can also be used, if required.



5. From the list of **Letters Available**, highlight the name of the letter you wish to publish and send. The options in the right-hand panel vary depending on the **Type of Letter** assigned to the selected letter.
6. Select and/or enter the required options for the type of letter selected. The following options are available.
   - **Chosen Code**

     Indicate the code(s) to be included in the report by selecting the required check box(es).



Include pupil/students with the following number of these marks:

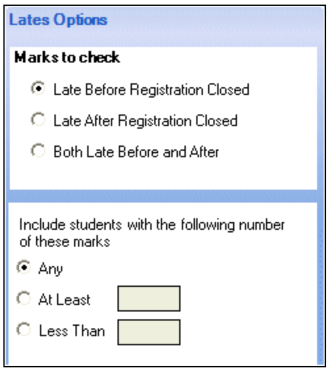
- **Any**
- **At Least**
- **Less Than**

Select the appropriate radio button and enter the required number of marks.

- **Lates**

  Select the radio button representing the Marks to check:

  - **Late Before Registration Closed**
  - **Late After Registration Closed**
  - **Both Late Before and After**



  Include students with the following number of marks:

  - **Any**
  - **At Least**
  - **Less Than**

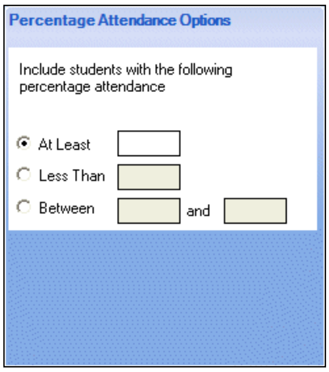
  Select the appropriate radio button and enter the required number of marks.

- **Percentage Attendance**

  Include students with the following percentage attendance:

  - **At Least**
  - **Less Than**
  - **Between < > and < >**

  Select the appropriate radio button and enter the required percentage.

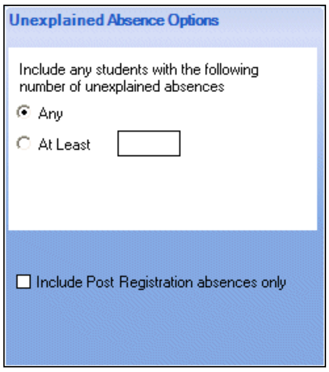


- **Unexplained Absence**

  Include students with the following number of unexplained absences:

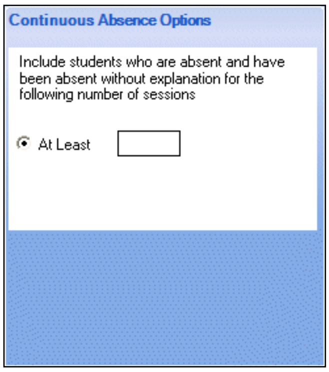
  - **Any**
  - **At Least**

Select the appropriate radio button and enter the required number of marks.



- **Continuous Absence**

  Applicable to Sessions Only



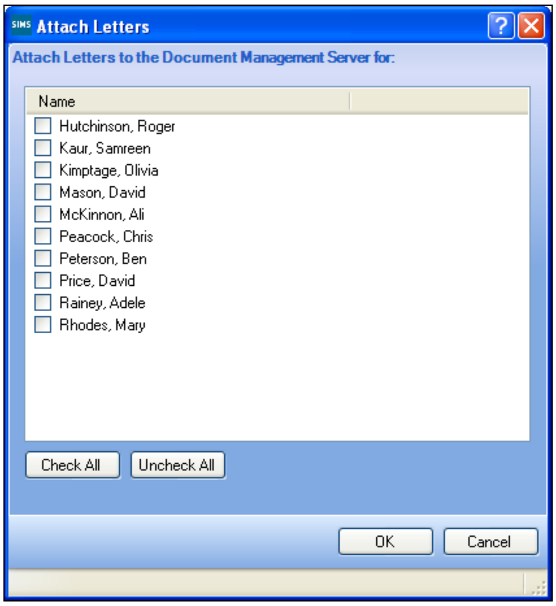
Include students who are currently absent and have been absent without explanation for the following number of sessions:

- **At Least**

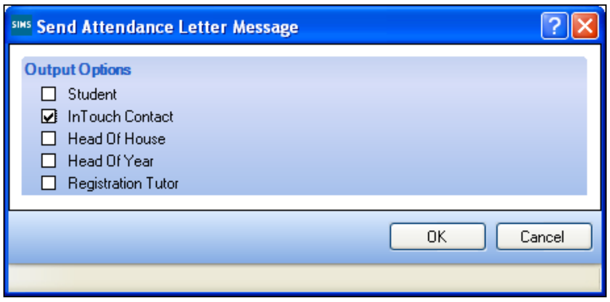
Enter the required number of sessions, e.g. 10.

7. Select the **Preview in Word** radio button then click the **Send** button to display the **Attach Letters** dialog. The **Send** button is disabled if the **Produce data file only (CSV format)** radio button is selected.

8. To attach the letter to the DMS for the selected pupil/students, select the appropriate check boxes. The **Check All** and **Uncheck All** buttons can be used to assist with the selection.

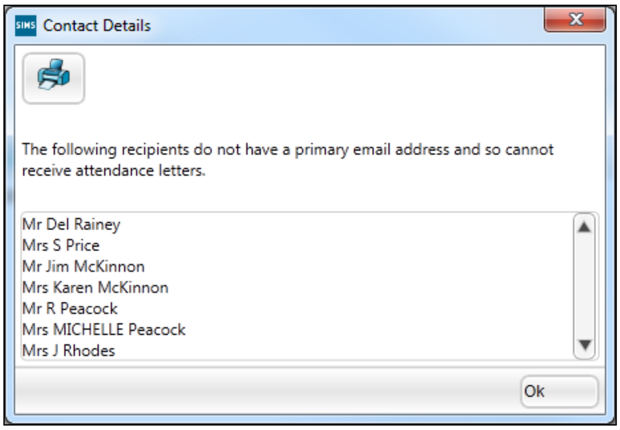


9. Click the **OK** button to attach the letters to the DMS, link the letters to the pupil/student's record and display the **Send Attendance Letter Message** dialog.

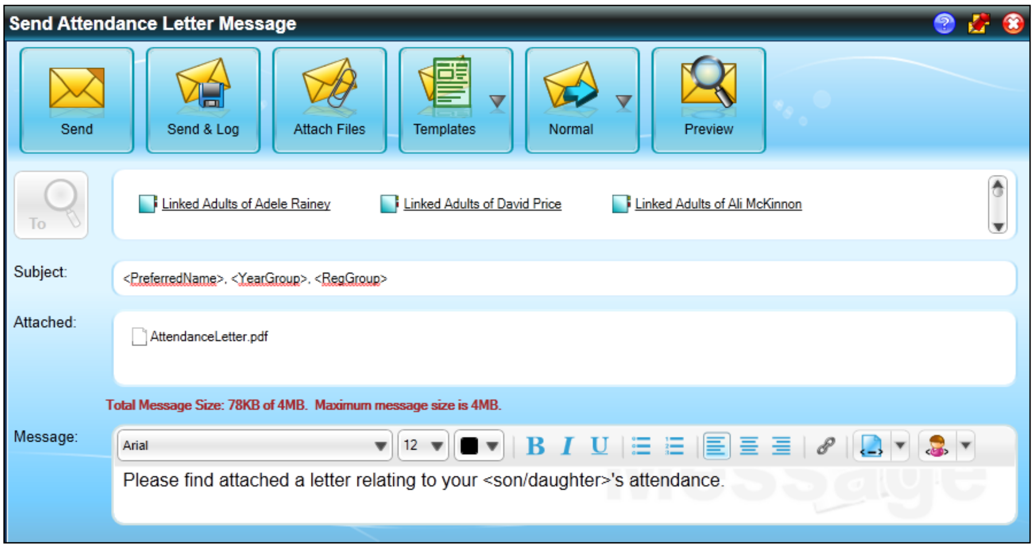


10. In the **Output Options** panel, select the type(s) of person to whom you wish to send the letter by selecting the appropriate check box(es). The check box(es) selected by default are the roles defined in the **Attendance Letter** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
11. Click the **OK** button to create the letter(s).

12. If a primary email address has not been recorded for any of the intended recipients, the following dialog is displayed.



13. Click the **Print** button to produce a report of these contacts, click the **Ok** button then update their contact record before running this process again. Alternatively, click the **Ok** button and continue to send the messages to contacts who have a primary email address recorded.
14. Once the letters are created, the **Send Attendance Letter Message** page is displayed and the attendance letter is attached to the message automatically. The letter is in PDF format.



> *NOTE: The recipient(s) of the message are determined at an earlier stage and cannot therefore be changed here.*

Once the message is sent, the attendance letter is accessible via the **Linked Documents** hyperlink in the **Links** panel of the pupil/student record (**Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details**).

Additional Resources:

Using the Pupil/Student Links Panel chapter of the *Managing Pupil/Students* handbook

More Information:

Sending a Pupil/Student Message on page *52*

Sending an Individual Assessment Report Message

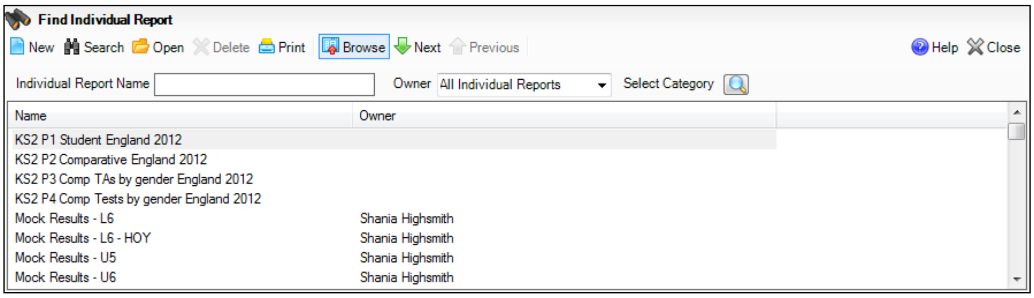
Individual Reports enable you to design and generate reports for individual pupil/students in Microsoft® Word.

Before reports can be generated, one or more Individual Report Formats must have been created in, or imported into, SIMS Assessment. Individual Report Formats are templates on which Individual Reports are based and are designed in Microsoft Word. Reports are generated by associating the required pupil/students with a selected Individual Report Format.

An email containing as an attachment a pupil/student's Individual Reports can be sent to a pupil/student's email address, their parent/guardians as well as the email address of other designated persons. The recipient(s) of the reports will be those defined in the **Individual Assessment Report** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).

> *NOTE: The following instructions assume that the Individual Reports that you wish to send have already been created in SIMS Assessment and that the selection of pupil/students has been made in the* ***Generate*** *panel of the of the* ***Individual Report Details*** *page. For detailed instructions on creating Individual Reports, please refer to the* Individual Reports *chapter of the* Reporting and Additional Functions in Assessment *handbook.*

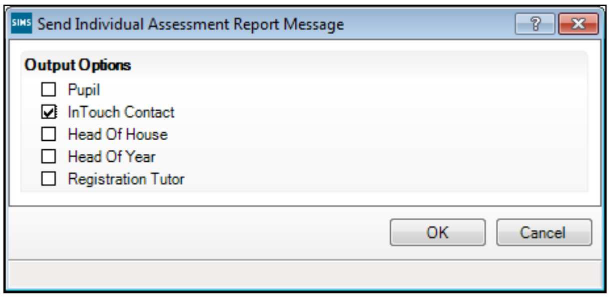
1. Select **Focus | Assessment | Individual Report** to display the **Find Individual Report** browser.



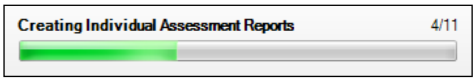
2. Search for and highlight the required Individual Report.
3. Click the **Open** button to display its details on the **Individual Report Details** page.
4. Select the appropriate options and the required pupil/students. For more information, please refer to the *Individual Reports* chapter of the *Reporting and Additional Functions in Assessment* handbook.

   Once the required pupil/students have been selected, the **Send** button becomes enabled.

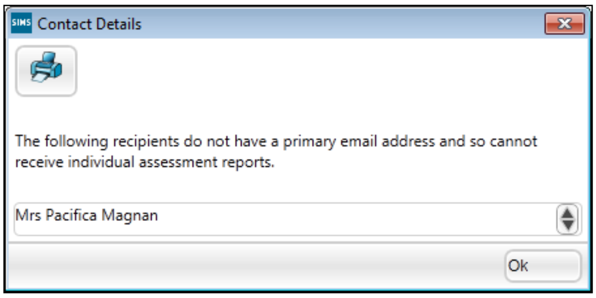
5. Click the **Send** button to display the **Send Individual Assessment Report Message** dialog.



6. In the **Output Options** panel, select the type(s) of person to whom you wish to send the report by selecting the appropriate check box(es). The check box(es) selected by default are the roles defined in the **Individual Assessment Report** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
7. Click the **OK** button to create the report(s).

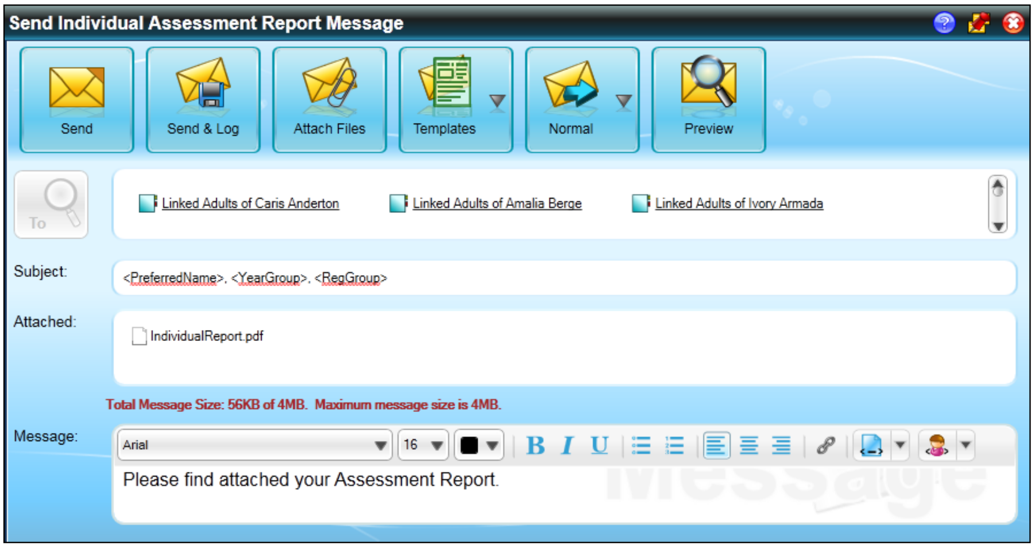


8. If a primary email address has not been recorded for any of the intended recipients, the following dialog is displayed.



9. Click the **Print** button to produce a report of these contacts, click the **Ok** button then update their contact record before running this process again. Alternatively, click the **Ok** button and continue to send the messages to contacts who have a primary email address recorded.

10. Once the letters are created, the **Send Individual Assessment Report Message** page is displayed and the individual report is attached to the message automatically. Where Microsoft Office 2007 or later is installed, the report is in PDF format. Where Microsoft Office 2003 is installed, the report is in RTF format.



NOTE: The recipient(s) of the message are determined at an earlier stage and therefore cannot be changed here.

More Information:
Sending a Pupil/Student Message on page *52*

Sending a Cover Slip Message

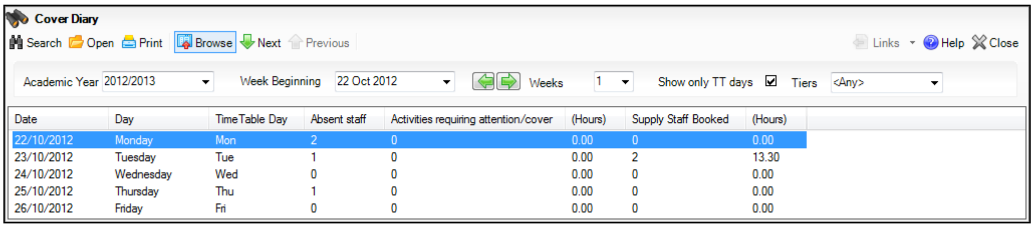
If a teacher is scheduled to provide cover for a class (perhaps because a member of staff is absent from school through illness) or if a class needs to be moved to a different room, a cover slip can be distributed to the teacher. For example, English Room 1 has been closed so that an exam can be held there so a Year 8 English class has been moved to English Room 5. Cover slips can be sent electronically from the Cover Diary, so that the covering teacher is aware of this additional commitment to their teaching schedule.

If a member of staff has multiple assignments, these are merged into a single message. However if you choose to send the message by SMS, more than one message might be sent.

Intended recipients will receive a message via the preferred communication method (SMS message, email message or internal message).

For detailed information regarding the use of the Cover Diary, together with the search options available from the browser, please refer to the *Cover* handbook.

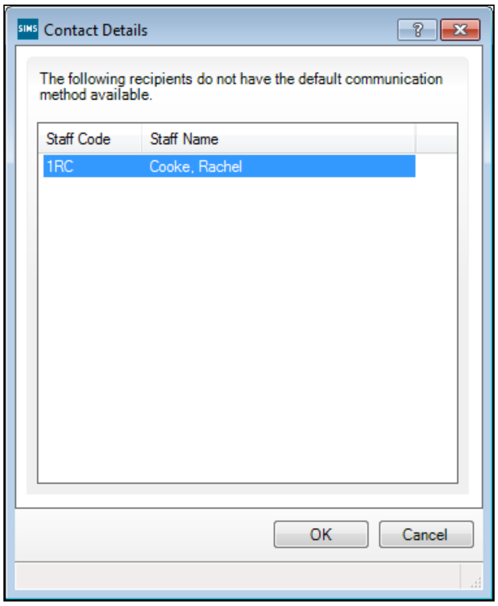
1. Select **Focus | School | Arrange Cover** to display the **Cover Diary** browser.



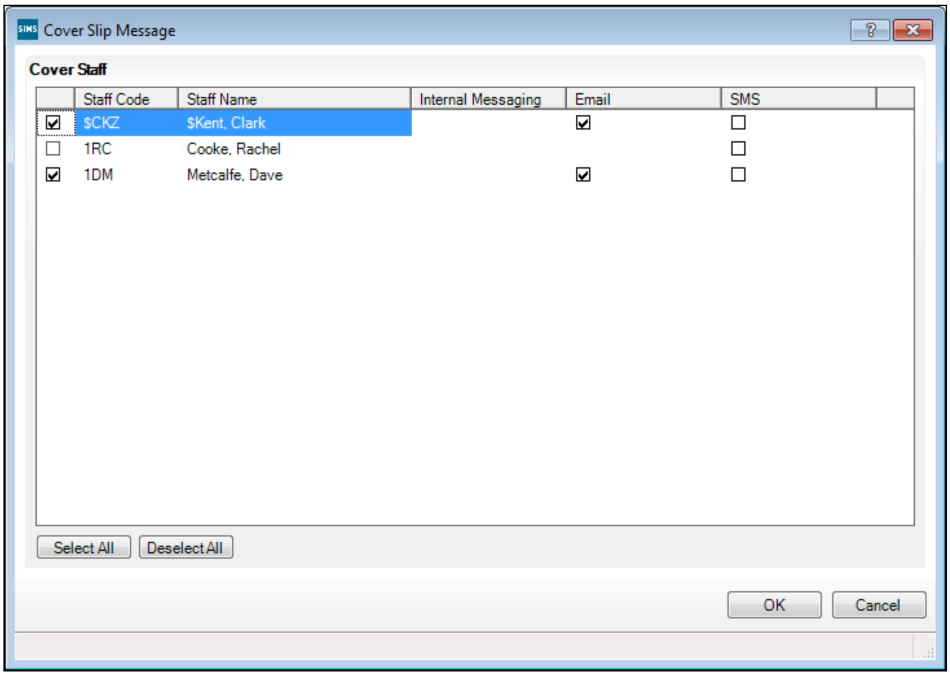
2. Search for and select the required day to display the **Cover Arrangements** page.
3. Make the appropriate cover arrangements then click the **Save** button.
4. Click the **Send** button to continue.

*NOTE: The **Send** button is enabled only if cover arrangements have been set.*

If an email address or mobile number has not been recorded for an intended recipient of this message (whichever is the default communication method for this type of message), the following dialog is displayed.



5. Click the **OK** button then update their contact record before running this process again. Alternatively, click the **OK** button and continue to send the messages to contacts who have the default communication method details recorded using the **Cover Slip Message** dialog. For the contacts who do not have the default details recorded, an alternative method of communicating the message can be selected using the **Cover Slip Message** on the following page.



Any member of staff who has been assigned cover on the selected day is displayed. The check box to the left of their name indicates whether or not they will be sent a cover slip. These check boxes are selected automatically.

If a member of staff does not have the required communication method details recorded, their name will be deselected automatically. To enable communication via the default communication method in these instances, enter the details in their staff record.

6. Deselect the check box of any member of staff to whom you do not wish to send a cover slip. Alternatively, click the **Select All** or **Deselect All** button.
7. On the right-hand side of the dialog, select the appropriate check box(es) of the required recipient(s) to indicate the method of communication. The check box(es) selected by default are the methods of communication defined in the **Cover Slips** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
8. Click the **OK** button to send the cover slips to the selected member(s) of staff.

Sending a Free School Meal Expiry Letter Message

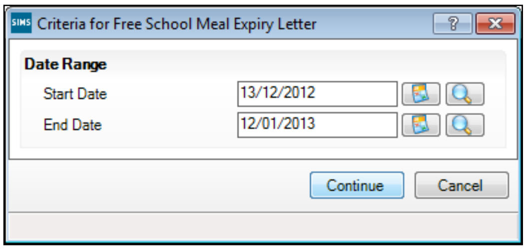
To assist with the timely distribution of letters to parent/guardians regarding a pupil's Dinner Money, an email message containing as an attachment a letter reminding them to re-apply for free school meals when their child's review date is due can be sent. The recipient(s) of the letter will be those defined in the **Dinner Money Letters** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).

Prior to sending Dinner Money letters via email, letter definitions must be set up (via **Tools | Dinner Money | Setup**). For more information on defining letter templates, please refer to the *Editing Dinner Money Letter Templates* chapter in the *Setting Up and Maintaining Dinner Money* handbook.

The process of producing the Dinner Money letters is identical to the existing functionality in SIMS, with an additional option available to send the letter via email.

> *NOTE: Users with Receipts Clerk and Bursar permissions can send a Dinner Money letter but are unable to view any responses via the **Messages** panel on the SIMS **Home Page** (via **Focus | Home Page**). However they can read the message if it has been saved and logged in the Communications Log via **Focus | Communication**.*

1. Select **Reports | Dinner Money | Letters | Free School Meal Expiry** to display the **Criteria for Free School Meal Expiry Letter** dialog.



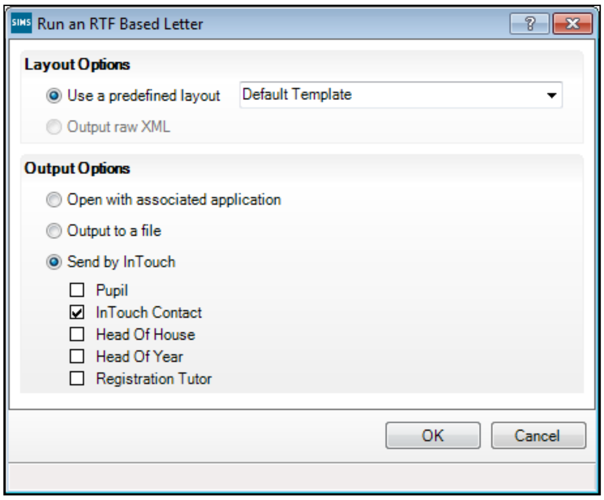
2. Define the expiration period that you wish the letters to cover by selecting the **Start Date** and **End Date**. The dates selected must be within a single academic year.

> *NOTE: The date range defaults from today's date to the date determined by the number of **Days in Advance** defined in the Free School Meal Eligibility reminder via **Focus | Alerts | Setup Reminders** (if this has been defined).*

Dates can be selected by clicking the **Calendar** or **Search** buttons then selecting the required date, or by entering dates manually.

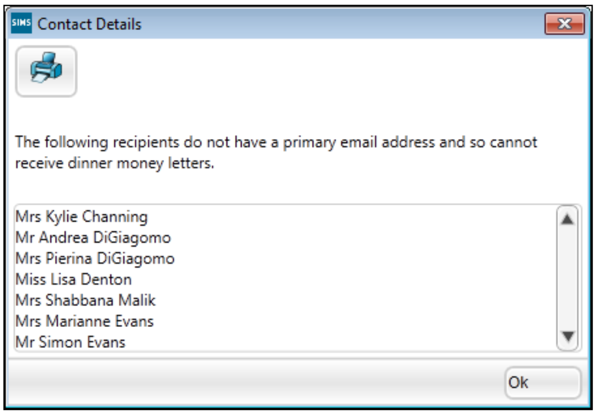
3. Click the **Continue** button to display the **Run an RTF Based Letter** dialog.

> *NOTE: You are informed if there are no free school meal eligibility review dates in the date range specified.*



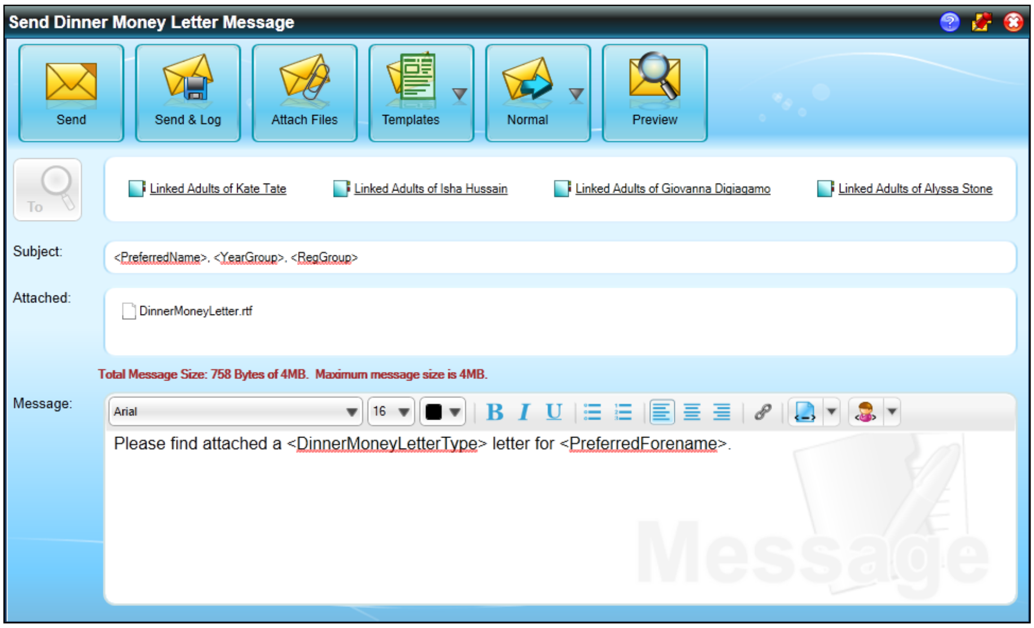
4. Select the **Send by InTouch** radio button in the **Output Options** panel then select the type(s) of person to whom you wish to send the letter by selecting the appropriate check box(es). The check box(es) selected by default are the roles defined in the **Dinner Money Letters** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
5. Click the **OK** button to create the letters.

   If a primary email address has not been recorded for any of the intended recipients, the following dialog is displayed.



6. Click the **Print** button to produce a report of these contacts, click the **Ok** button then update their contact record before running this process again. Alternatively, click the **Ok** button and continue to send the messages to contacts who have a primary email address recorded.

Once the letters are created, the **Send Dinner Money Letter Message** page is displayed. The letter is attached to the message automatically.



7. The default recipient(s) of the message are determined at an earlier stage but can be changed for each pupil by clicking the appropriate **Address Book** icon in the **To** field, e.g. in the previous graphic, click the icon adjacent to **Linked Adults of Kate Tate**, then selecting the required additional recipient(s).

 *Address Book icon*

More Information:
Sending a Pupil/Student Message on page *52*

Sending a Debtor Letter Message

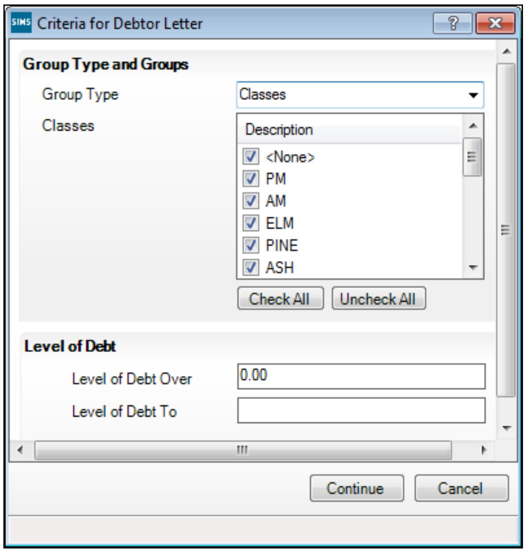
To assist with the timely distribution of letters to parent/guardians regarding a pupil's Dinner Money, an email message containing as an attachment a letter informing them that they owe money for the meals taken by their children can be sent. The recipient(s) of the letter will be those defined in the **Dinner Money Letters** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).

Prior to sending Dinner Money letters via email, letter definitions must be set up (via **Tools | Dinner Money | Setup**). For more information on defining letter templates, please refer to the *Editing Dinner Money Letter Templates* chapter in the *Setting Up and Maintaining Dinner Money* handbook.

The process of producing the Dinner Money letters is identical to the existing functionality in SIMS, with an additional option available to send the letter via email.

> *NOTE: Users with Receipts Clerk and Bursar permissions can send a Dinner Money letter but are unable to view any responses via the **Messages** panel on the SIMS **Home Page** (via **Focus | Home Page**). However they can read the message if it has been saved and logged in the Communications Log via **Focus | Communication**.*

1. Select **Reports | Dinner Money | Letters | Debtor** to display the **Criteria for Debtor Letter** dialog.



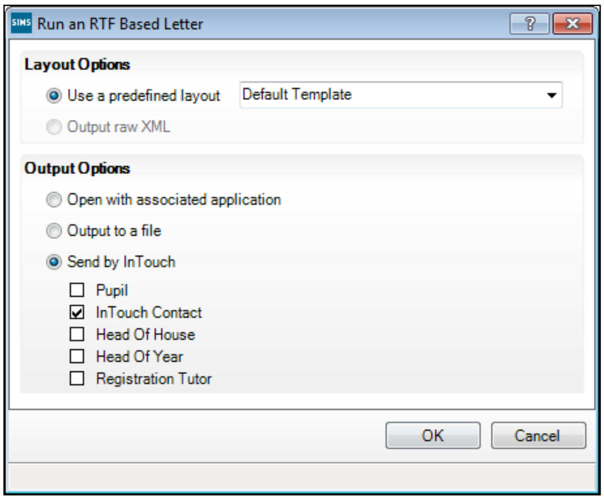
2. Select the pupils you wish to include in the report by selecting the required **Group Type** from the drop-down list. The options are **All**, **Tiers**, **Year Groups**, **Classes** and **Individuals**.
3. The **Group Type** selected in the previous step is displayed as the label of the following field. All items in the adjacent list are selected by default but the selection can be amended by selecting or deselecting the appropriate check box(es) or by clicking the **Check All** or **Uncheck All** buttons.

   If you select **Individuals** as the **Group Type**:

   a. Click the **Add** button to display the **Find Pupils** browser.
   b. Search for and highlight the required pupils then click the **OK** button. Multiple pupils can be selected using **Ctrl + click** or **Shift + click**.
   c. All the pupils are selected by default in the **Criteria for Debtor Letter** dialog but the selection can be amended by selecting or deselecting the appropriate check box(es) or by clicking the **Check All** or **Uncheck All** buttons.
4. In the **Level of Debt** panel, the **Level of Debt Over** defaults to the value specified in the **Level of Debt** field on the **Dinner Money Setup Detail** page (via **Tools | Dinner Money | Setup**) but can be edited, if required.
5. Enter the **Level of Debt To**.

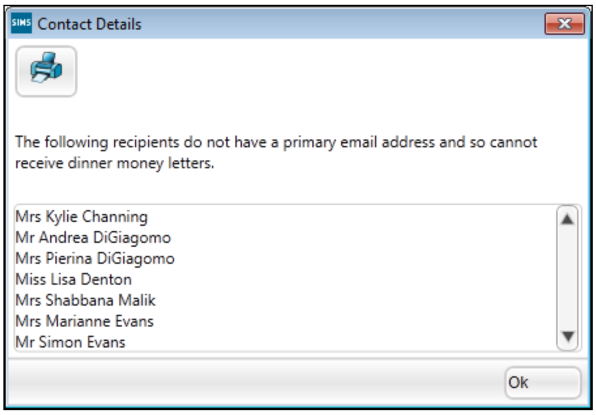
   Setting level of debt criteria enables you to create multiple debt letters for different severities of debt.
6. Click the **Continue** button to display the **Run an RTF Based Letter** dialog.

NOTE: You are informed if there are no pupils with an outstanding debt greater than that specified.



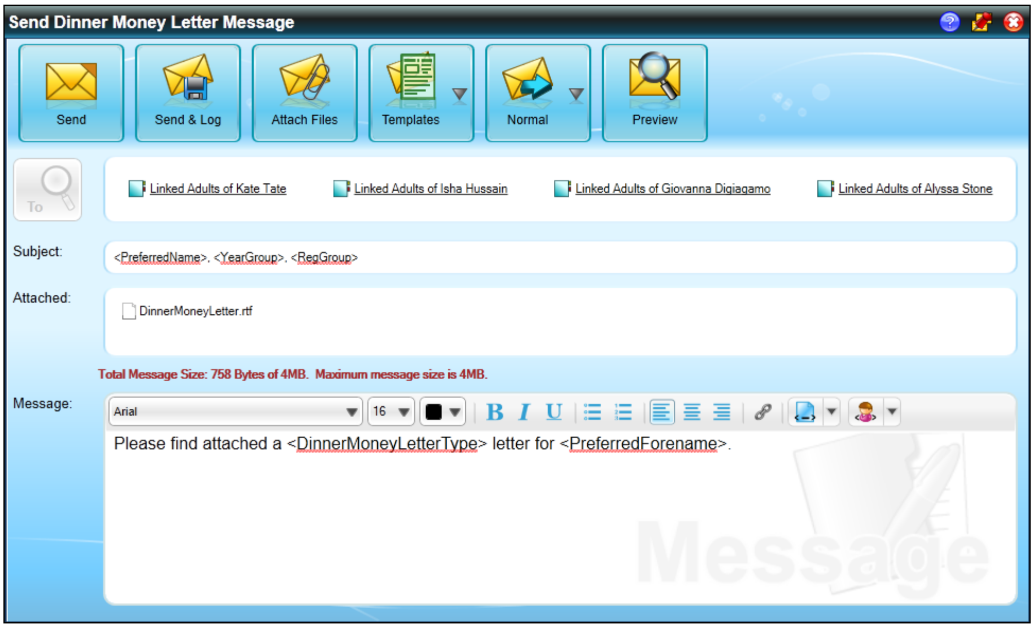
7. Select the **Send by InTouch** radio button in the **Output Options** panel then select the type(s) of person to whom you wish to send the letter by selecting the appropriate check box(es). The check box(es) selected by default are the roles defined in the **Dinner Money Letters** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
8. Click the **OK** button to create the letters.

   If a primary email address has not been recorded for any of the intended recipients, the following dialog is displayed.



9. Click the **Print** button to produce a report of these contacts, click the **Ok** button then update their contact record before running this process again. Alternatively, click the **Ok** button and continue to send the messages to contacts who have a primary email address recorded.

Once the letters are created, the **Send Dinner Money Letter Message** page is displayed. The letter is attached to the message automatically.



10. The default recipient(s) of the message are determined at an earlier stage but can be changed for each pupil by clicking the appropriate **Address Book** icon in the **To** field, e.g. in the previous graphic, click the icon adjacent to **Linked Adults of Kate Tate**, then selecting the required additional recipient(s).

 *Address Book icon*

More Information:
Sending a Pupil/Student Message on page *52*

Sending a Creditor Letter Message

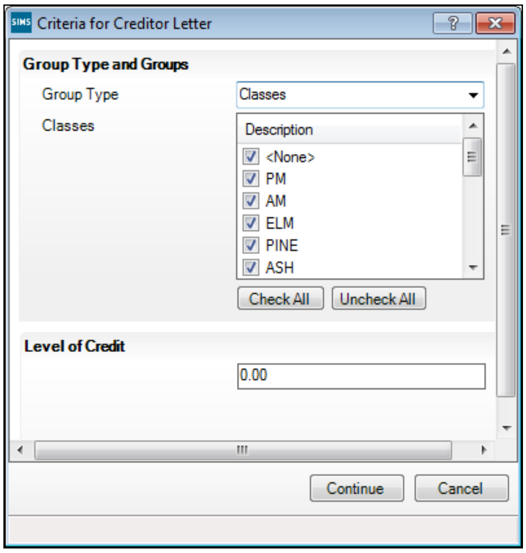
To assist with the timely distribution of letters to parent/guardians regarding a pupil's Dinner Money, an email message containing as an attachment a letter informing them that their child's balance is in credit can be sent. The recipient(s) of the letter will be those defined in the **Dinner Money Letters** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).

Prior to sending Dinner Money letters via email, letter definitions must be set up (via **Tools | Dinner Money | Setup**). For more information on defining letter templates, please refer to the *Editing Dinner Money Letter Templates* chapter in the *Setting Up and Maintaining Dinner Money* handbook.

The process of producing the Dinner Money letters is identical to the existing functionality in SIMS, with an additional option available to send the letter via email.

> *NOTE: Users with Receipts Clerk and Bursar permissions can send a Dinner Money letter but are unable to view any responses via the **Messages** panel on the SIMS **Home Page** (via **Focus | Home Page**). However, they can read the message if it has been saved and logged in the Communications Log via **Focus | Communication**.*

1. Select **Reports | Dinner Money | Letters | Creditor** to display the **Criteria for Creditor Letter** dialog.

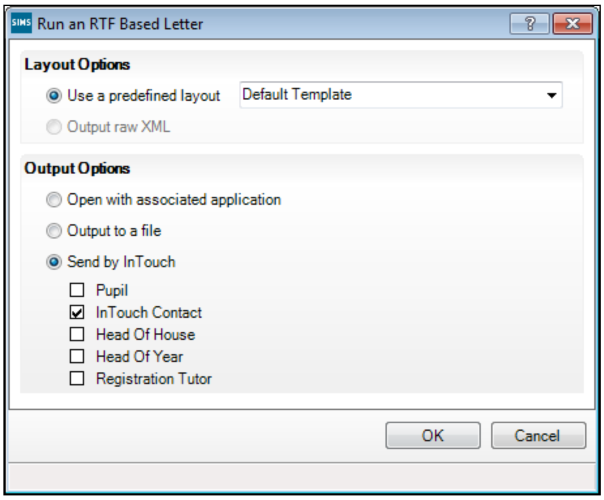


2. Select the pupils you wish to include in the report by selecting the required **Group Type** from the drop-down list. The options are **All**, **Tiers**, **Year Groups**, **Classes** and **Individuals**.
3. The **Group Type** selected in the previous step is displayed as the label of the following field. All items in the adjacent list are selected by default but the selection can be amended by selecting or deselecting the appropriate check box(es) or by clicking the **Check All** or **Uncheck All** buttons.

   If you select **Individuals** as the **Group Type**:

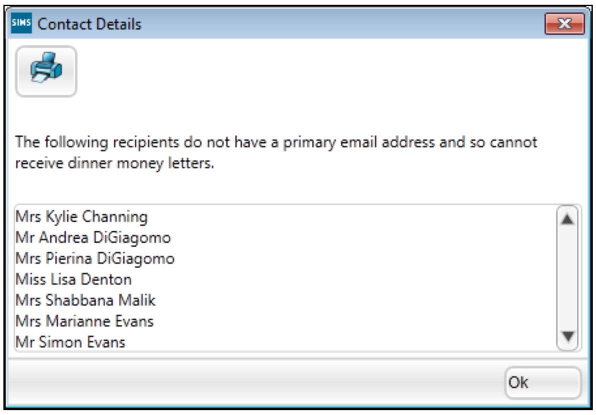
   a. Click the **Add** button to display the **Find Pupils** browser.
   b. Search for highlight the required pupils then click the **OK** button. Multiple pupils can be selected using **Ctrl + click** or **Shift + click**.
   c. All the pupils are selected by default in the Criteria for Creditor Letter dialog but the selection can be amended by selecting or deselecting the appropriate check box(es) or by clicking the **Check All** or **Uncheck All** buttons.
4. The **Level of Credit** defaults to the value specified in the **Level of Credit** field on the **Dinner Money Setup Detail** page (via **Tools | Dinner Money | Setup**) but can be edited, if required.
5. Click the **Continue** button to display the **Run an RTF Based Letter** dialog.

NOTE: You are informed if there are no pupils with a credit balance greater than that specified.



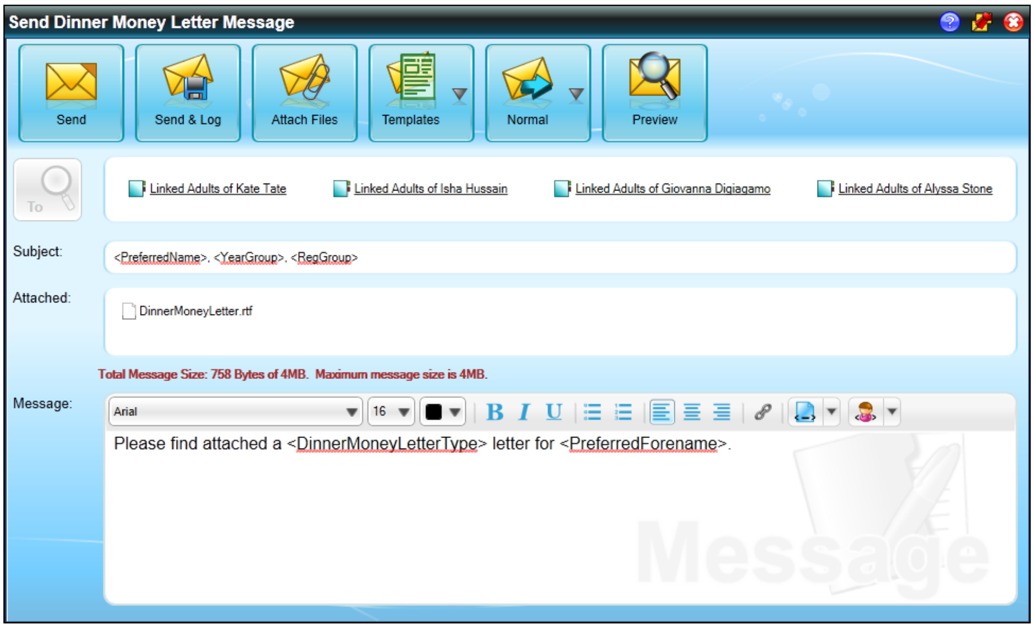
6. Select the **Send by InTouch** radio button in the **Output Options** panel then select the type(s) of person to whom you wish to send the letter by selecting the appropriate check box(es). The check box(es) selected by default are the roles defined in the **Dinner Money Letters** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
7. Click the **OK** button to create the letters.

   If a primary email address has not been recorded for any of the intended recipients, the following dialog is displayed.



8. Click the **Print** button to produce a report of these contacts, click the **Ok** button then update their contact record before running this process again. Alternatively, click the **Ok** button and continue to send the messages to contacts who have a primary email address recorded.

Once the letters are created, the **Send Dinner Money Letter Message** page is displayed. The letter is attached to the message automatically.



9. The default recipient(s) of the message are determined at an earlier stage but can be changed for each pupil by clicking the appropriate **Address Book** icon in the **To** field, e.g. in the previous graphic, click the icon adjacent to **Linked Adults of Kate Tate**, then selecting the required additional recipient(s).

 *Address Book icon*

More Information:
Sending a Pupil/Student Message on page *52*

Sending a Summary Statement Letter Message

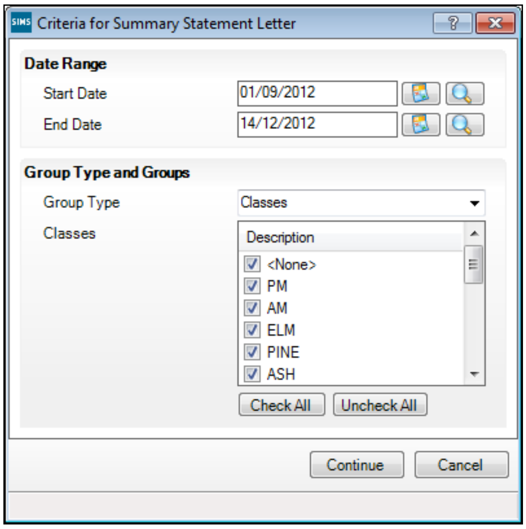
To assist with the timely distribution of letters to parent/guardians regarding a pupil's Dinner Money, an email message containing as an attachment a letter showing a statement of the cost of meals taken and paid for during the period from the start of the current academic year to today's date can be sent. The balance at the start and the close of the period are also provided. The recipient(s) of the letter will be those defined in the **Dinner Money Letters** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).

Prior to sending Dinner Money letters via email, letter definitions must be set up (via **Tools | Dinner Money | Setup**). For more information on defining letter templates, please refer to the *Editing Dinner Money Letter Templates* chapter in the *Setting Up and Maintaining Dinner Money* handbook.

The process of producing the Dinner Money letters is identical to the existing functionality in SIMS, with an additional option available to send the letter via email.

> *NOTE: Users with Receipts Clerk and Bursar permissions can send a Dinner Money letter but are unable to view any responses via the* ***Messages*** *panel on the SIMS* ***Home Page*** *(via* ***Focus | Home Page****). However they can read the message if it has been saved and logged in the Communications Log via* ***Focus | Communication****.*

1. Select **Reports | Dinner Money | Letters | Summary Statement** to display the **Criteria for Summary Statement Letter** dialog.

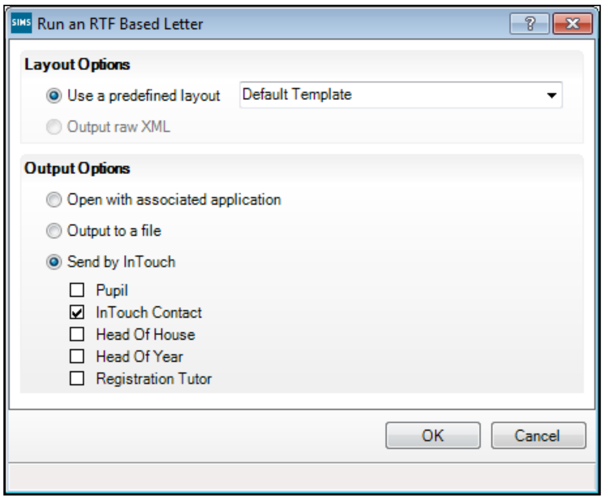


2. Define the period for the summary statement by entering the **Start Date** and **End Date**. Alternatively, select the required dates by clicking the **Calendar** or **Search** button then selecting the dates. Dates within a single academic year can be selected.
3. Select the pupils you wish to include in the report by selecting the required **Group Type** from the drop-down list. The options are **All**, **Tiers**, **Year Groups**, **Classes** and **Individuals**.
4. The **Group Type** selected in the previous step is displayed as the label of the following field. All items in the adjacent list are selected by default but the selection can be amended by selecting or deselecting the appropriate check box(es) or by clicking the **Check All** or **Uncheck All** buttons.

   If you select **Individuals** as the **Group Type**:

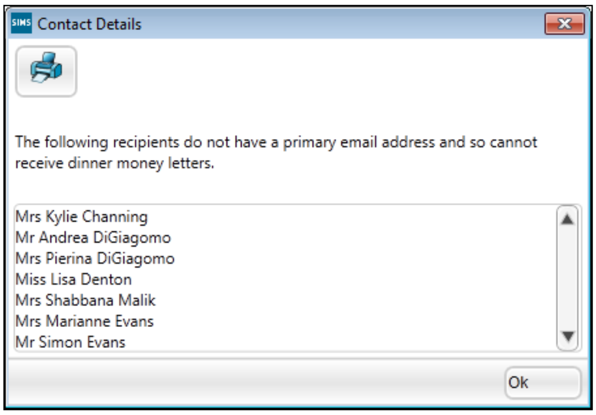
   a. Click the **Add** button to display the **Find Pupils** browser.
   b. Search for and highlight the required pupils then click the **OK** button. Multiple pupils can be selected using **Ctrl + click** or **Shift + click**.
   c. All the pupils are selected by default in the **Criteria for Summary Statement Letter** dialog but the selection can be amended by selecting or deselecting the appropriate check box(es) or by clicking the **Check All** or **Uncheck All** buttons.

5. Click the **Continue** button to display the **Run an RTF Based Letter** dialog.



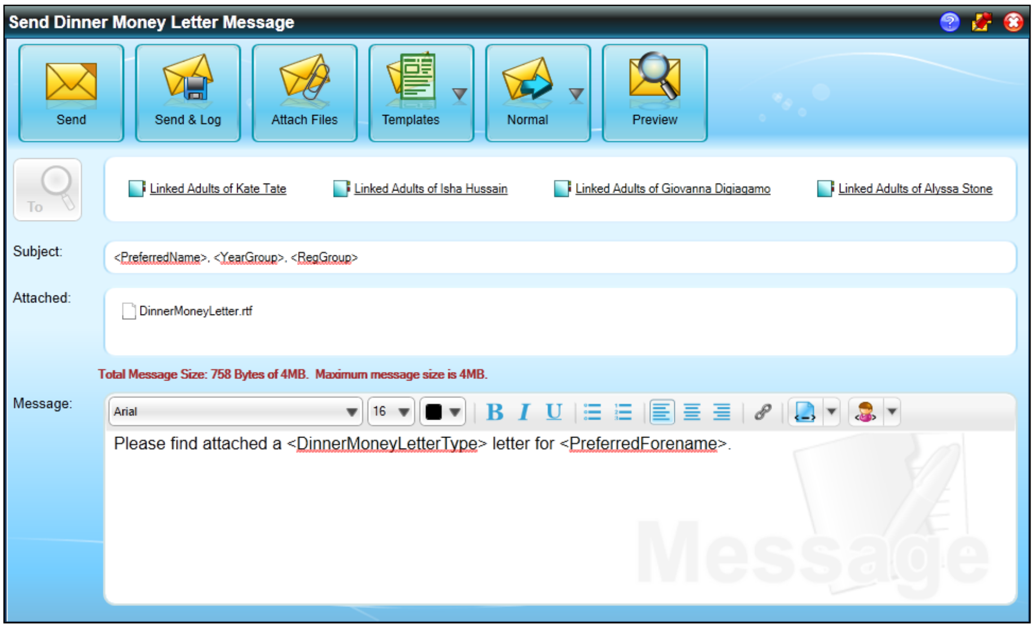
6. Select the **Send by InTouch** radio button in the **Output Options** panel then select the type(s) of person to whom you wish to send the letter by selecting the appropriate check box(es). The check box(es) selected by default are the roles defined in the **Dinner Money Letters** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
7. Click the **OK** button to create the letters.

   If a primary email address has not been recorded for any of the intended recipients, the following dialog is displayed.



8. Click the **Print** button to produce a report of these contacts, click the **Ok** button then update their contact record before running this process again. Alternatively, click the **Ok** button and continue to send the messages to contacts who have a primary email address recorded.

9. Once the letters are created, the **Send Dinner Money Letter Message** page is displayed. The letter is attached to the message automatically.



10. The default recipient(s) of the message are determined at an earlier stage but can be changed for each pupil by clicking the appropriate **Address Book** icon in the **To** field, e.g. in the previous graphic, click the icon adjacent to **Linked Adults of Kate Tate**, then selecting the required additional recipient(s).

 *Address Book icon*

More Information:
Sending a Pupil/Student Message on page *52*

Sending a Charge Forecast Letter Message

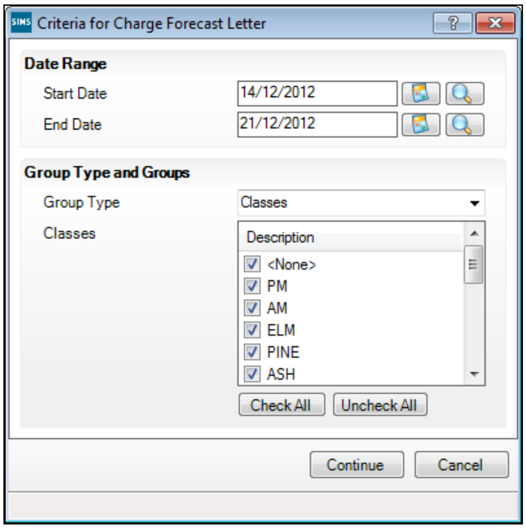
To assist with the timely distribution of letters to parent/guardians regarding a pupil's Dinner Money, an email message containing as an attachment a letter indicating future meal charges for a specified period can be sent. The recipient(s) of the letter will be those defined in the **Dinner Money Letters** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).

Prior to sending Dinner Money letters via email, letter definitions must be set up (via **Tools | Dinner Money | Setup**). For more information on defining letter templates, please refer to the *Editing Dinner Money Letter Templates* chapter in the *Setting Up and Maintaining Dinner Money* handbook.

The process of producing the Dinner Money letters is identical to the existing functionality in SIMS, with an additional option available to send the letter via email.

> *NOTE: Users with Receipts Clerk and Bursar permissions can send a Dinner Money letter but are unable to view any responses via the **Messages** panel on the SIMS **Home Page** (via **Focus | Home Page**). However they can read the message if it has been saved and logged in the Communications Log via **Focus | Communication**.*

1. Select **Reports | Dinner Money | Letters | Charge Forecast** to display the **Criteria for Charge Forecast Letter** dialog.

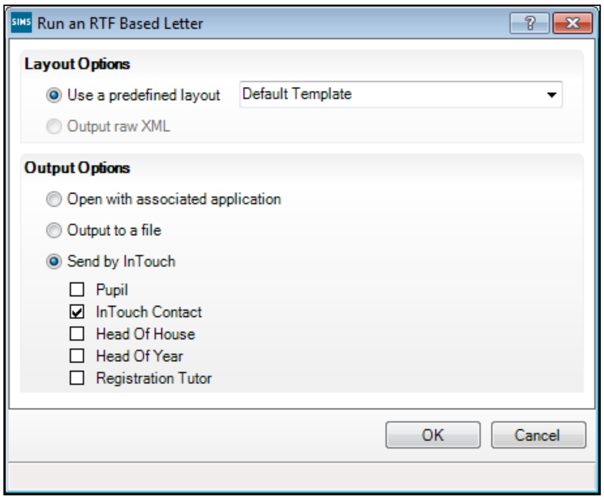


2. Define the period for the summary statement by entering the **Start Date** and **End Date**. Alternatively, select the required dates by clicking the **Calendar** or **Search** button then selecting the required dates. Dates within a single academic year can be selected.
3. Select the pupils you wish to include in the report by selecting the required **Group Type** from the drop-down list. The options are **All**, **Tiers**, **Year Groups**, **Classes** and **Individuals**.
4. The **Group Type** selected in the previous step is displayed as the label of the following field. All items in the adjacent list are selected by default but the selection can be amended by selecting or deselecting the appropriate check box(es) or by clicking the **Check All** or **Uncheck All** buttons.

   If you select **Individuals** as the **Group Type**:

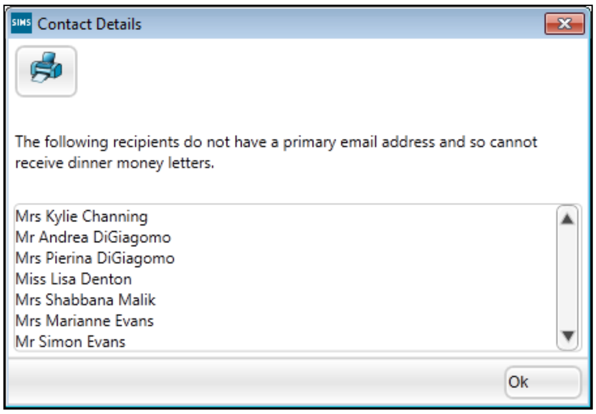
   a. Click the **Add** button to display the **Find Pupils** browser.
   b. Search for and highlight the required pupils then click the **OK** button. Multiple pupils can be selected using **Ctrl + click** or **Shift + click**.
   c. All the pupils are selected by default in the **Criteria for Charge Forecast Letter** dialog but the selection can be amended by selecting or deselecting the appropriate check box(es) or by clicking the **Check All** or **Uncheck All** buttons.
5. Click the **Continue** button to display the **Run an RTF Based Letter** dialog.

NOTE: If an incomplete meal pattern exists (i.e. a pattern is missing completely, starts late or finishes early within the date range specified), a list of affected pupils is displayed.



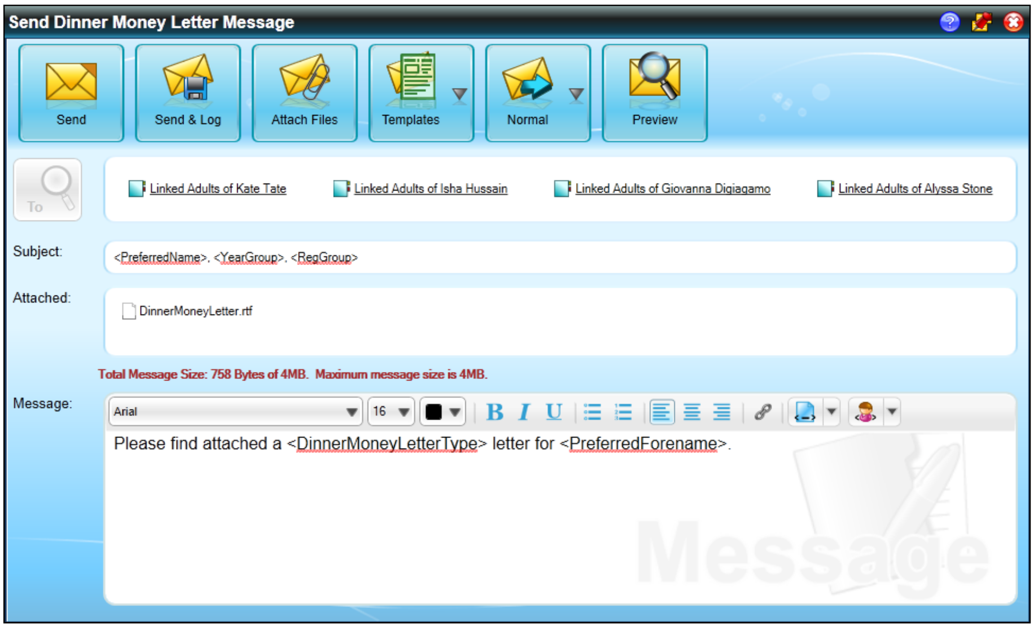
6. Select the **Send by InTouch** radio button in the **Output Options** panel then select the type(s) of person to whom you wish to send the letter by selecting the appropriate check box(es). The check box(es) selected by default are the roles defined in the **Dinner Money Letters** panel on the **InTouch Defaults Setup** page (please see *Setting Default Communication Methods* on page *176*) (via **Tools | InTouch | Defaults Setup**).
7. Click the **OK** button to create the letters.

   If a primary email address has not been recorded for any of the intended recipients, the following dialog is displayed.



8. Click the **Print** button to produce a report of these contacts, click the **Ok** button then update their contact record before running this process again. Alternatively, click the **Ok** button and continue to send the messages to contacts who have a primary email address recorded.

Once the letters are created, the **Send Dinner Money Letter Message** page is displayed. The letter is attached to the message automatically.



9. The default recipient(s) of the message are determined at an earlier stage but can be changed for each pupil by clicking the appropriate **Address Book** icon in the **To** field, e.g. in the previous graphic, click the icon adjacent to **Linked Adults of Kate Tate**, then selecting the required additional recipient(s).

 *Address Book icon*

More Information:
Sending a Pupil/Student Message on page *52*

08 | Setting Up Emergency Alert Notifications, the Default Communication Method and SMS Matching

Setting Up the Emergency Alert Notification

It may be necessary for a class teacher to request immediate assistance as a result of an emergency in the classroom. The use of emergency alerts in SIMS enables a class teacher to request assistance from anywhere in SIMS, both quickly and efficiently.

Prior to using this functionality, you must select the member(s) of staff who will be notified immediately in the event of an emergency, together with the preferred method of contacting them.

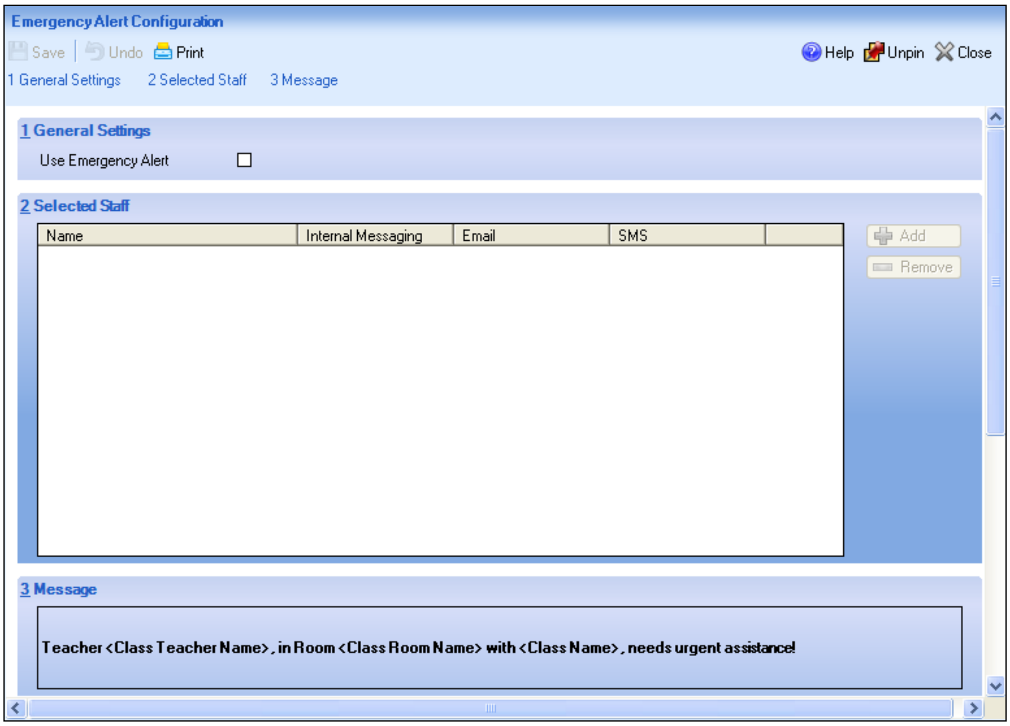
Once the intended recipients of emergency alerts have been selected, they will receive an internal message (accessible via the **Messages** panel on the SIMS **Home Page** or via **Focus | InTouch | Show Messages**). Careful consideration should be given to the selection of intended recipients for an emergency alert.

Once opened, the message displays the following predefined text. This text is read-only.

`Teacher <Class Teacher Name>, in Room <Class Room Name> with <Class Name>, needs urgent assistance!`

The `<Class Teacher Name>`, `<Class Room Name>` and `<Class Name>` tags are populated automatically by SIMS once the emergency alert message is sent. This information is extracted from your SIMS database, preventing the need to enter it manually.

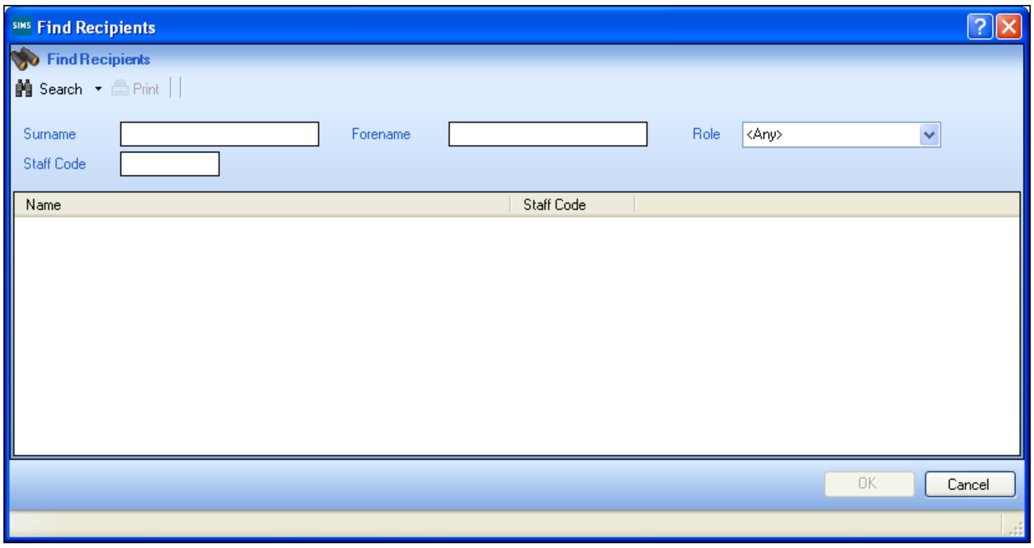
1. Select **Tools | Setups | Emergency Alert** to display the **Emergency Alert Configuration** page.



2. If you wish to make use of the emergency alert functionality, select the **Use Emergency Alert** check box in the **General Settings** panel.

*NOTE: It is possible to use this functionality only if the **Use Emergency Alert** check box is selected.*

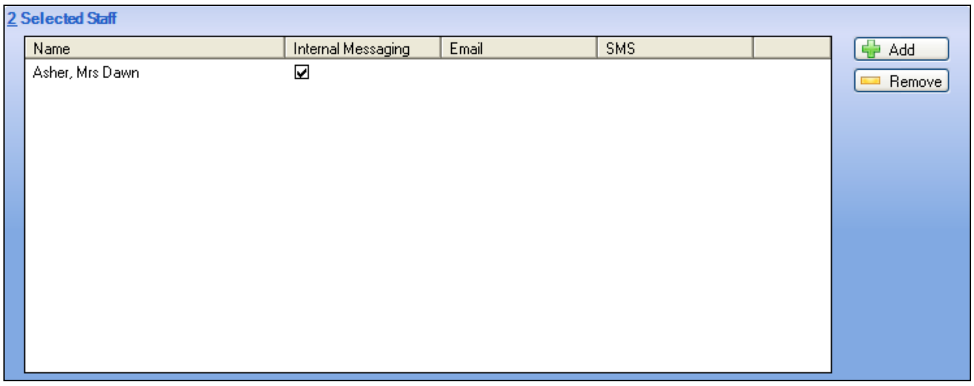
3. Select the member(s) of staff you wish to notify each time an emergency alert is triggered by clicking the **Add** button in the **Selected Staff** panel to display the **Find Recipients** dialog.



4. Enter the intended recipient's **Surname**, **Forename** and/or **Staff Code**.
5. Select their staff **Role** from the drop-down list.
6. Select the type of search you wish to carry out by clicking the drop-down arrow adjacent to the **Search** button then making your selection, e.g. **Names Begin With** or **Names Sound Like**.

   The default option is **Names Begin With**, so if you wish to use this option click the **Search** button.

   Alternatively click the **Search** button without entering search criteria to display all members of staff recorded in SIMS.
7. Highlight the required intended recipient(s) then click the **OK** button to return to the **Emergency Alert Configuration** panel, where the selected recipient is displayed in the **Selected Staff** panel.



8. Repeat steps 3 to 7 to add more recipients of an emergency alert, if required.
9. Any members of staff added in error can be removed by highlighting their name then clicking the **Remove** button.
10. Select the preferred method of communication for each recipient of an emergency alert by selecting the appropriate check boxes. The options are:
    - **Internal Messaging** – this option is available only if the person is recorded as being a SIMS user.
    - **Email** – this option is available only if an email address is recorded against the person and the address has been marked as **Home/Main** or **Work/Main**.
    - **SMS** – this option is available only if a mobile phone number is recorded against the person and the number has been marked as their **Main** number.

    NOTE: More than one method of communication can be selected, if required.
11. The **Message** panel displays the text that will be sent to the selected recipients each time an emergency alert is sent. This text is read-only.
12. Once the required information has been selected, click the **Save** button to save your changes.

More Information:
Sending an Emergency Alert on page *70*

Setting Default Communication Methods

When you create a message and select the intended recipients, their default method of communication is selected automatically. This section describes how to set the default method of communication for each role in the school using the **General** panel.

The following panels on the **InTouch Defaults Setup** page enable you to define separate communication defaults for the corresponding message types:

- **Behaviour Notification**
- **Exam and Pupil/Student Timetable**
- **Unexplained Absence**
- **Late Notification**
- **Exam Reminder**
- **Attendance Letter**
- **Exam Results**
- **Individual Assessment Report**
- **Dinner Money Letters**
- **Cover Slips**
- **Cumulative Achievement Alerts**.

Where a particular message type enables you to define separate defaults, the options selected in these panels take precedence over those selected in the **General** panel. For example, if you indicate in the **General** panel that **Staff** should receive correspondence via **Internal Messaging** but in the **Unexplained Absence** panel you indicate that they should receive **Email** correspondence, the option(s) selected in the **Unexplained Absence** panel takes precedence for this message type only. Therefore an email will be sent for this message type. For all other message types, unless over-ridden by the settings in the five additional panels named above bottom five panels of this page, the default communication method is taken from the **General** panel.

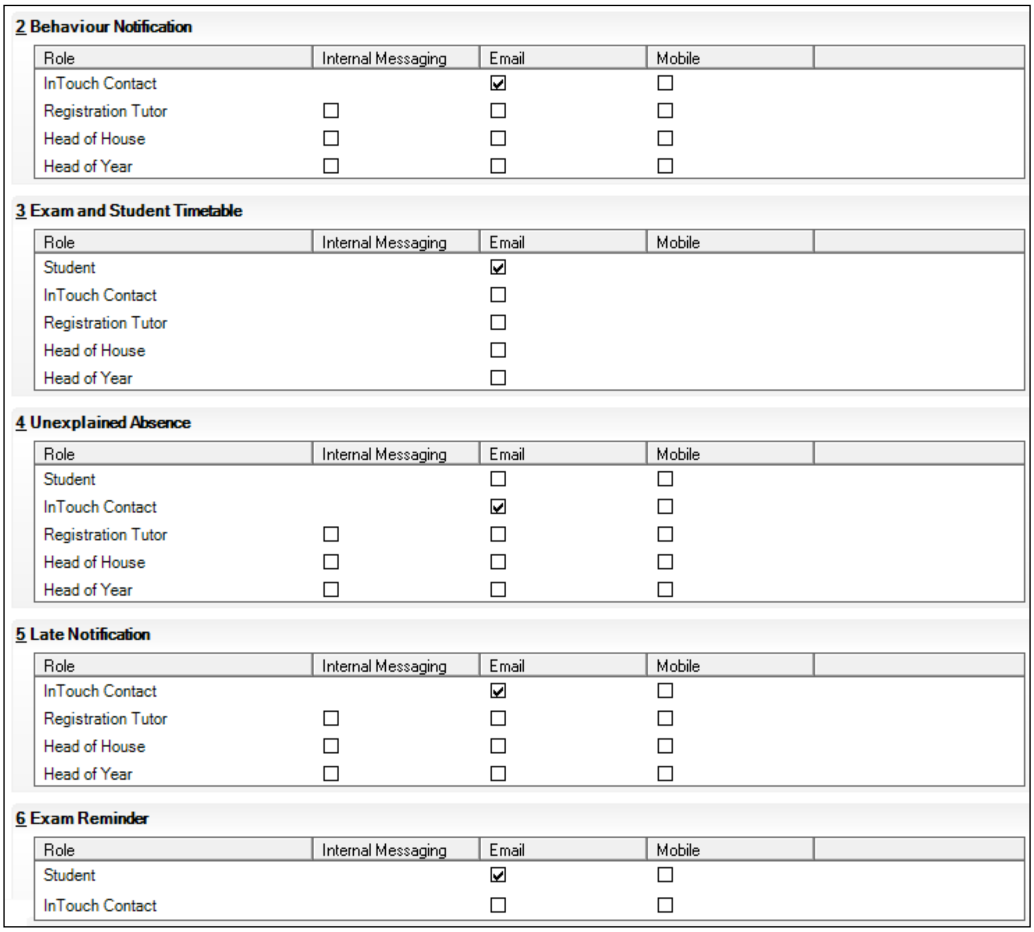
1. Select **Tools | InTouch | Defaults Setup** to display the **InTouch Defaults Setup** page.
2. Click the **General** hyperlink to display the **General** panel.

1 General

Role	Internal Messaging	Email	Mobile	
Student		◉	○	
Applicant		◉	○	
Staff	◉	○	○	
Parental Contact		◉	○	
Agent		◉	○	
Governor		◉	○	
Other School		◉		
Other		◉	○	

3. For each staff **Role**, select the radio button that indicates the default method of communication you wish to use.

If a mistake is made while defining the default communication methods, click the **Undo** button to revert to the settings as they were the last time this page was saved.



2 Behaviour Notification

Role	Internal Messaging	Email	Mobile	
InTouch Contact		☑	☐	
Registration Tutor	☐	☐	☐	
Head of House	☐	☐	☐	
Head of Year	☐	☐	☐	

3 Exam and Student Timetable

Role	Internal Messaging	Email	Mobile	
Student		☑		
InTouch Contact		☐		
Registration Tutor		☐		
Head of House		☐		
Head of Year		☐		

4 Unexplained Absence

Role	Internal Messaging	Email	Mobile	
Student		☐	☐	
InTouch Contact		☑	☐	
Registration Tutor	☐	☐	☐	
Head of House	☐	☐	☐	
Head of Year	☐	☐	☐	

5 Late Notification

Role	Internal Messaging	Email	Mobile	
InTouch Contact		☑	☐	
Registration Tutor	☐	☐	☐	
Head of House	☐	☐	☐	
Head of Year	☐	☐	☐	

6 Exam Reminder

Role	Internal Messaging	Email	Mobile	
Student		☑	☐	
InTouch Contact		☐	☐	

7 Attendance Letter

Role	Internal Messaging	Email	Mobile	
Student		☐		
InTouch Contact		☑		
Registration Tutor		☐		
Head of House		☐		
Head of Year		☐		

8 Exam Results

Role	Internal Messaging	Email	Mobile	
Student		☑		
InTouch Contact		☐		
Registration Tutor		☐		
Head of House		☐		
Head of Year		☐		

9 Individual Assessment Report

Role	Internal Messaging	Email	Mobile	
Student		☐		
InTouch Contact		☑		
Registration Tutor		☐		
Head of House		☐		
Head of Year		☐		

10 Dinner Money Letters

Role	Internal Messaging	Email	Mobile	
Student		☐		
InTouch Contact		☑		
Registration Tutor		☐		
Head of House		☐		
Head of Year		☐		

11 Cover Slips

Role	Internal Messaging	Email	Mobile	
Staff	☐	☐	☑	

12 Cumulative Achievement Alerts

Role	Internal Messaging	Email	Mobile	
Student		☑	☐	
InTouch Contact		☐	☐	
Registration Tutor	☐	☐	☐	
Head of House	☐	☐	☐	
Head of Year	☐	☐	☐	

4. For the remaining panels on this page (the names of which are listed at the top of this section), select the check box relating to the preferred method(s) of communication for messages of that type.
5. Once the required communication methods have been set, click the **Save** button to save the changes.

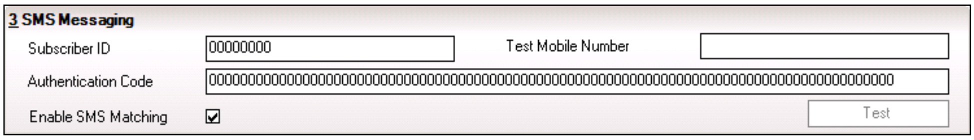
> *NOTE: If the settings in the **Behaviour Notification** panel are changed, you must restart SIMS to affect the change.*

Enabling the Matching of an Incoming SMS Message with the Original Message

Any messages sent to your school from an external source (e.g. a parent) are accessible from the **Messages** panel on the SIMS **Home Page**. These might include messages that cannot be matched to a message sent previously from SIMS, or responses to Unexplained Absences, Pupil/Student Profiles or Exceptional Circumstances messages.

SIMS can 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.

1. Select **Tools | InTouch | Module Setup** to display the **InTouch Setup** page.
2. Click the **SMS Messaging** hyperlink to display the **SMS Messaging** panel.



3. Select the **Enable SMS Matching** check box, then click the **Save** button to save the changes.

More Information:
Introduction on page *73*

09 | Producing Reports in SIMS InTouch

Introduction

SIMS InTouch provides two predefined reports regarding your school's messaging activity.

- Failed Outbound Messages report
- Message Audit report.

Producing the Failed Outbound Messages Report

The Failed Outbound Messages report provides information on any messages sent to external sources (mobile - i.e. SMS or push notification - or email) that have failed to send or are pending transmission (i.e. they are currently in a queue).

Duchy School (916 4321)

Failed Outbound Messages | **Period: 01/09/2010 to 19/01/2011**

SMS

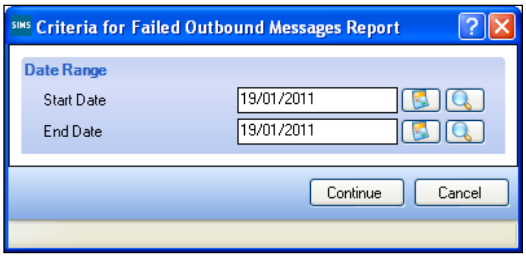
Name	Role	Contact Details	Created	Transmitted	Status	User
07747533927		07842553029	18/01/2011 12:28:56		Failed, Retrying	user2
Carlson, Mr Joe	Contact	07842553029	18/01/2011 12:28:56		Failed, Retrying	user2

Created on 19/01/2011 at 11:21 by User Two

A message will typically be included on this report if an incorrect mobile telephone number or email address has been selected or entered, or if the network is busy and therefore the message has failed to send after a period of four hours.

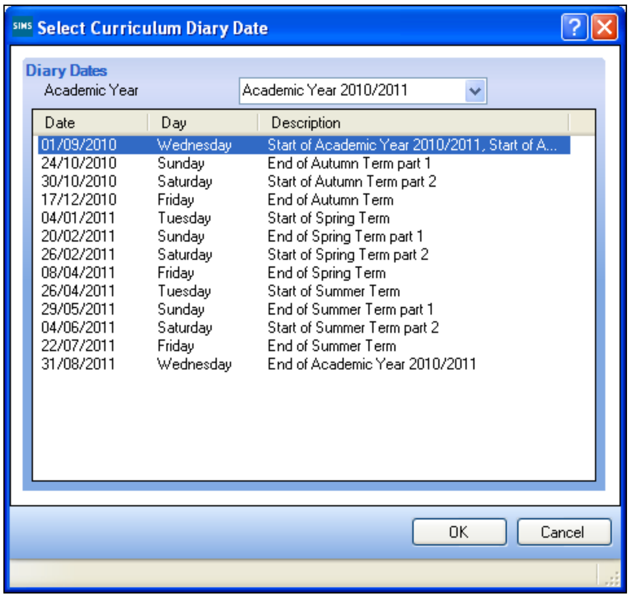
The report enables you to enter or select the date range over which you wish to run the report. The report output provides information on the intended recipient (this will be a mobile telephone number or email address if the intended recipient is not recorded in SIMS), their role (if they are recorded in SIMS), the date and time the message was created and transmitted, the message status and the user who created the message.

1. Select **Reports | InTouch | Failed Outbound Messages** to display the **Criteria for Failed Outbound Messages Report** dialog.



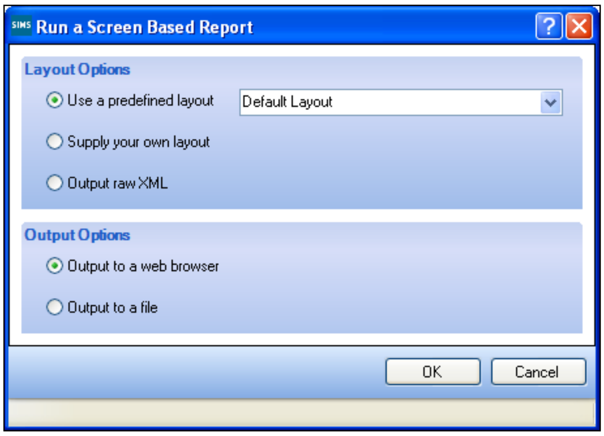
2. Select the **Start Date** and **End Date** for the report by clicking each **Calendar** button then selecting the required dates, or enter the dates manually.

   Alternatively, diary dates (e.g. academic year start/end dates, term start/end dates) can be used as start and end dates for the report by clicking the appropriate **Browser** button adjacent to the required date to display the **Select Curriculum Diary Date** dialog.



3. The **Academic Year** defaults to the current academic year but can be edited by selecting from the drop-down list.
4. With the correct academic year selected, highlight the appropriate diary date then click the **OK** button to return to the **Criteria for Failed Outbound Messages Report** dialog.

5. Once the appropriate dates have been selected, click the **Continue** button to display the **Run a Screen Based Report** dialog.



More Information:
Running a Screen Based Report on page *190*

Producing the Message Audit Report

The Messaging Audit report provides details of all messages sent to, and received by, SIMS. A number of report filters are provided, enabling you to determine the communication methods on which you wish to report, the users who sent messages, etc.

This report can be produced in two formats:

- **Summary**

  This is the default report format and it provides information on the total number of sent and received messages, together with the total number of credits used for SMS messages (applicable to the Sent Messages Audit Type only).

- **Detailed**

  This report format provides a detailed breakdown of all sent and received messages, including message content, if required. Selecting the Detailed report format also produces the information provided by the Summary report.

The following graphic is a sample report output for the **Sent Messages** section.

Green Abbey School (823 4321)	
Messaging Audit	**Period: 01/09/2018 to 16/01/2019**
Audit Type: Sent Messages; **Communication Methods:** All; **Message Types:** All; **Users:** All; **Recipients/Senders:** All; **Students:** Disabled	

Summary

Credits Used	46
Messages Sent	125

Users

BlackA	23
User1	1
user2	101

Communication Methods

Email	50
Internal Messaging	3
Push Notification	24
SMS	48

Message Types

Achievement Award	1
Behaviour Incident or Points	1
Behaviour Message	4
Emergency Alert	4
General Message	33
School Event Message	1
Student General Message	71
Unexplained Absence Message	10

Recipients

Aaron, Liz	1
Aaron, Mr Jonas	3
Abbess, Mr Terry	2
Ackton, Mrs Kimberly	3
Amis, Mrs Yalonda	2
Barnes, Mr David	2
Barnes, Mrs Samantha	2
Basra, Mrs Rumana	2
Blacker, Mr Adrian	1
Chang, Mr Jiang	2

The following graphic is a sample report output for the **Received Messages** section.

Green Abbey School (823 4321)	
Messaging Audit	**Period: 01/09/2018 to 16/01/2019**
Audit Type: Received Messages; **Communication Methods:** All; **Message Types:** All; **Users:** All; **Recipients/Senders:** All; **Students:** Disabled	

Summary

Messages Received	33

Users

BlackA	4
User1	1
School	10
user2	17
ZelinskovaA	1

Communication Methods

Email	19
Internal Messaging	3
Push Notification	5
SMS	6

Message Types

Emergency Alert	2
General Message	13
Student General Message	16
Unexplained Absence Message	2

Sender

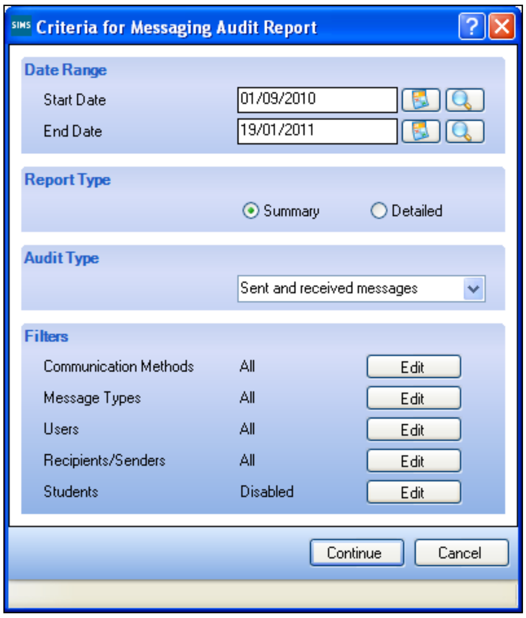
Blacker, Mr Adrian	2
Hitchbourne, Ms Tracey	4
Abbas, Alisa	2
Avery, Helen	1
Boston, Sarah	1
Boswell, Jennifer Arlene	9
Brooks, Carl Thomas	2
Cable, Freda	3
Fortune, Shirley	5
Myles, Kevin Henry	1
Rooke, Peter John	3

Students

Hitchbourne, Kirsty, 9B	18

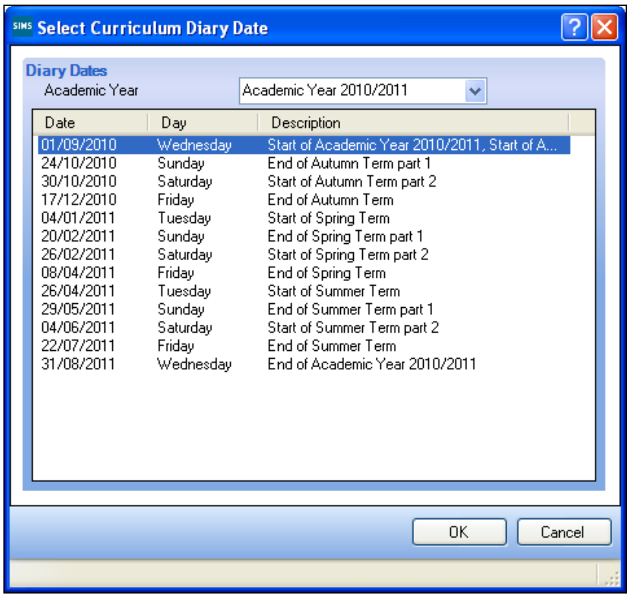
Created on 16/01/2019 at 12:32 by Mr Adrian Blacker

1. Select **Reports | InTouch | Messaging Audit** to display the **Criteria for Messaging Audit Report** dialog.



2. Select the **Start Date** and **End Date** for the report by clicking each **Calendar** button then selecting the required dates, or enter the dates manually.

   Alternatively, diary dates (e.g. academic year start/end dates and term start/end dates) can be used as start and end dates for the report by clicking the appropriate **Browser** button adjacent to the required date to display the **Select Curriculum Diary Date** dialog.



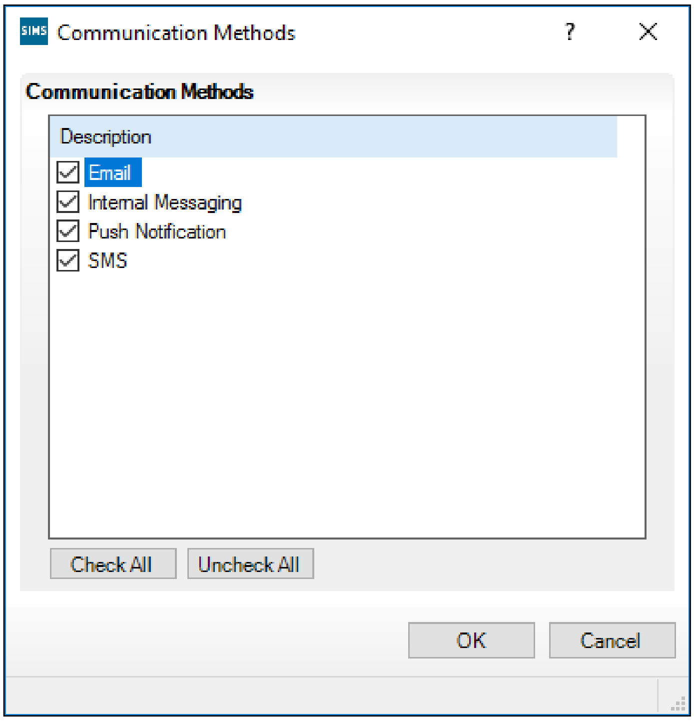
3. The **Academic Year** defaults to the current academic year but can be edited by selecting from the drop-down list.

4. Select the type of report you wish to produce by selecting either the **Summary** or **Detailed** radio button in the **Report Type** panel.
5. Select the type of audit you wish to carry out by selecting the required option from the drop-down list in the **Audit Type** panel. The options are **Sent messages**, **Received messages** or **Sent and received messages**.
6. The **Filters** panel enables you to select the status for each filter condition. The currently selected status for each filter is displayed adjacent to the filter name, e.g. **All**, **Disabled**, etc.

   Communication Methods

   The communication methods available in SIMS InTouch are **Email**, **Internal Messaging**, **Push Notification** and **SMS**. The default setting is to report on **All** communication methods.

   a. To change the communication method(s) on which you wish to report, click the **Edit** button to display the **Communication Methods** dialog.



   b. Deselect the check box of the communication method(s) on which you do not wish to report. Select the check box(es) again to include them in the report.

   Alternatively, click the **Check All** or **Uncheck All** buttons to facilitate selection.

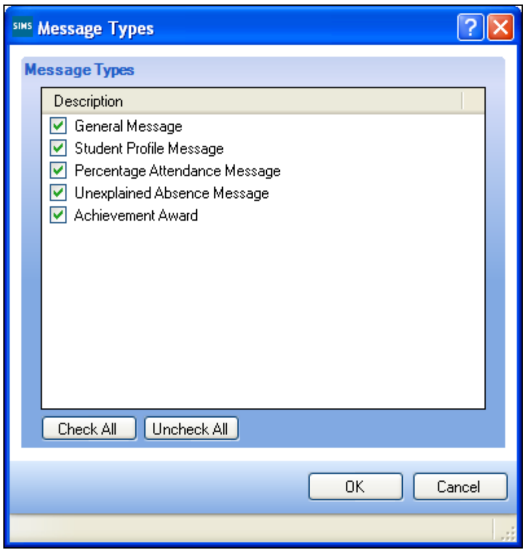
   > *NOTE: Only communication methods with any auditable activity are displayed, i.e. only if a communication of a certain type has been sent between the selected* ***Start Date*** *and* ***End Date*** *will it be displayed.*

   c. Click the **OK** button to return to the **Criteria for Messaging Audit Report** dialog.

Message Types

The report can be produced for any number of message types. The message types available in SIMS InTouch are **General Message**, **Student Profile Message**, **Percentage Attendance Message**, **Unexplained Absence Message** and **Achievement Award**. The default setting is to report on **All** message types.

a. To change the message type(s) on which you wish to report, click the **Edit** button to display the **Message Types** dialog.



b. Deselect the check box of the message type(s) on which you do not wish to report. Select the check box(es) again to include them in the report.

Alternatively, click the **Check All** or **Uncheck All** buttons to facilitate selection.

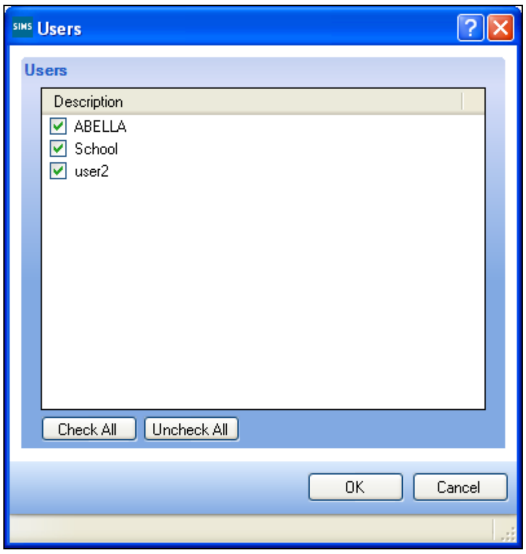
> *NOTE: Only message types with any auditable activity are displayed, i.e. only if a message of a certain type has been sent between the selected* ***Start Date*** *and* ***End Date*** *will it be displayed.*

c. Click the **OK** button to return to the **Criteria for Messaging Audit Report** dialog.

Users

The report can be produced for any SIMS users who have sent or received a message. The default setting is to report on **All** users.

a. To change the user(s) on whom you wish to report, click the **Edit** button to display the **Users** dialog.



b. Deselect the check box of the user(s) on whom you do not wish to report. Select the check box(es) again to include them in the report.

   Alternatively, click the **Check All** or **Uncheck All** buttons to facilitate selection.

> *NOTE: Only users with any auditable activity are displayed, i.e. only if a user has sent, or has been sent, a message between the selected* ***Start Date*** *and* ***End Date*** *will they be displayed.*
>
> *To enable messages sent to the Messages inbox to be included in this report, a new 'user' named* ***School*** *is available for selection in this dialog. Select its check box to report on messages sent to the Messages inbox.*

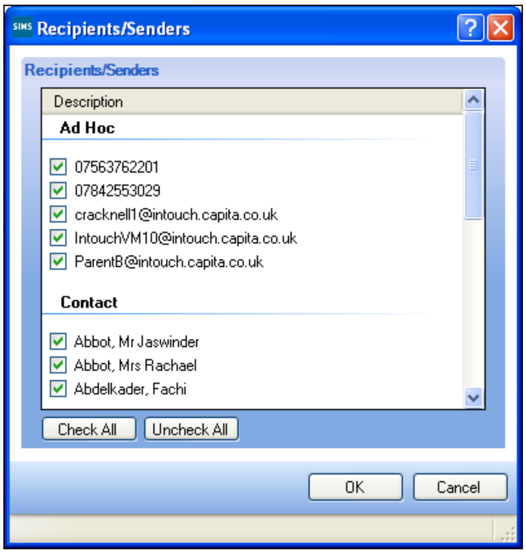
c. Click the **OK** button to return to the **Criteria for Messaging Audit Report** dialog.

Recipients/Senders

The report can be produced for any recipient or sender of a message. The default setting is to report on **All** recipients and senders. For recipients or senders whose contact details are not stored in SIMS, their email address or mobile telephone number is available for selection.

To facilitate selection, the recipients and senders are displayed in categories, e.g. **Ad Hoc** (for people whose contact details are not recorded in SIMS), **Employee**, **Contact**, etc.

a. To change the recipient(s) or sender(s) on whom you wish to report, click the **Edit** button to display the **Recipients/Senders** dialog.



b. Deselect the check box of the recipient(s) or sender(s) on whom you do not wish to report. Select the check box(es) again to include them in the report.

Alternatively, click the **Check All** or **Uncheck All** buttons to facilitate selection.

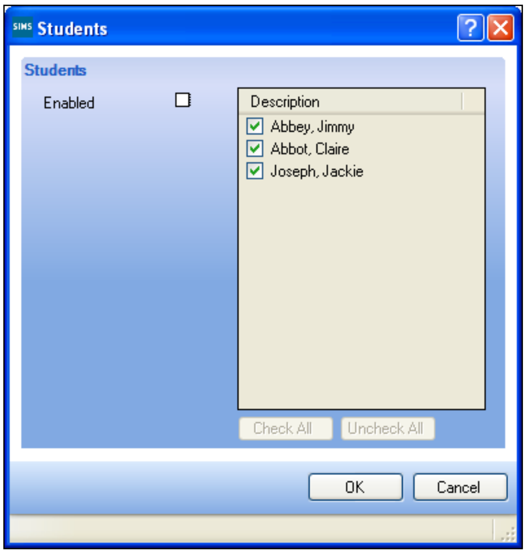
> *NOTE: Only recipients or senders with any auditable activity are displayed, i.e. only if a somebody has received or sent a message between the selected **Start Date** and **End Date** will they be displayed.*

c. Click the **OK** button to return to the **Criteria for Messaging Audit Report** dialog.

Students

The report can be produced for any pupil/student about whom a message has been sent or received. The default setting is **Disabled** therefore this information will not be reported unless you select to do so.

a. To change the pupil/student(s) regarding whom you wish to report, click the **Edit** button to display the **Students** dialog.



b. To enable the reporting of messages regarding specific pupil/students, select the **Enabled** check box to activate the list on the right-hand side.

c. Deselect the check box of the pupil/student(s) on whom you do not wish to report. Select the check box(es) again to include them in the report.

Alternatively, click the **Check All** or **Uncheck All** buttons to facilitate selection.

> *NOTE: Only pupil/students with any auditable activity are displayed, i.e. only if a pupil/student about whom a message has been received or sent between the selected **Start Date** and **End Date** will they be displayed.*

d. Click the **OK** button to return to the **Criteria for Messaging Audit Report** dialog.

7. With the correct academic year selected, highlight the appropriate diary date then click the **OK** button to return to the **Criteria for Messaging Audit Report** dialog.

8. Once the appropriate report criteria have been selected, click the **Continue** button to display the **Run a Screen Based Report** dialog.

Running a Screen Based Report

The **Run a Screen Based Report** dialog enables you to select the layout and output options for the selected report and is displayed once you have selected the appropriate report criteria.

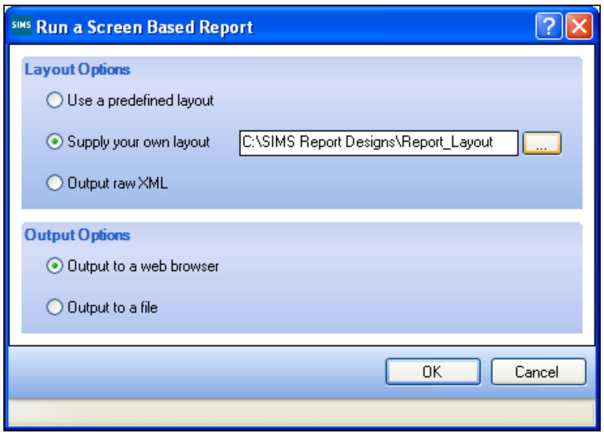
The **Use a predefined layout** and **Output to a web browser** options are selected by default.

1. Specify the preferred layout option by selecting the appropriate radio button.
   - **Use a predefined layout**

     The **Default Layout** is selected and cannot be edited.
   - **Supply your own layout**

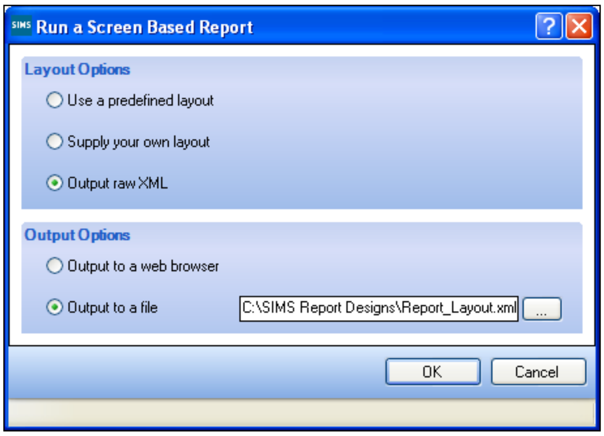
     This option is available for schools that prefer a report layout that is different to the default layout available in SIMS. Before selecting this option, an .XSL file (recommended for the production of a printed output from .XML) must have been created.

     Click the **Browse** button to display the **Select a layout file** dialog, navigate to the required location, highlight the required .XSL file then click the **Open** button to return to the **Run a Screen Based Report** dialog. Alternatively, enter the path and filename manually.



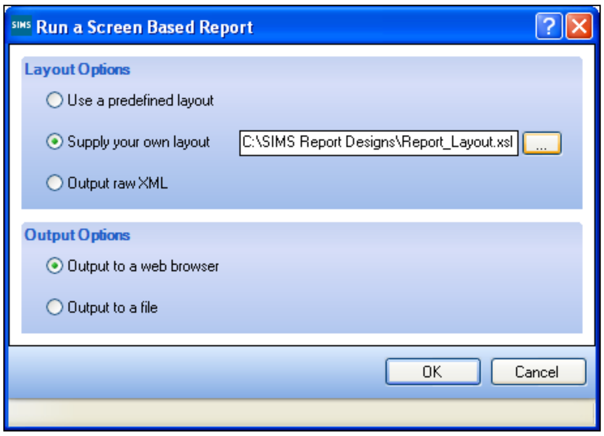
   - **Output raw XML**

     This option outputs raw .XML data, which is stored in the SIMS database. This can then be imported into another application, e.g. Microsoft® XL, and formatted to your school's requirements.



2. Specify the preferred output option by selecting the appropriate radio button.
   - **Output to a web browser**

     The default option produces a report in HTML format and displays it in your default web browser.

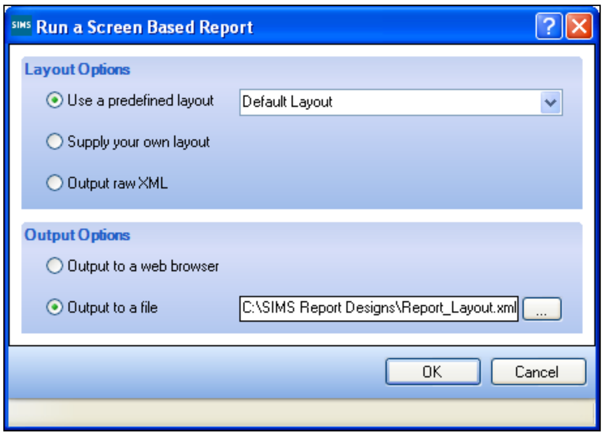
     

   - **Output to a file**

     This option produces a report in .XML format to the location specified.

     Enter the location where you want to save the .XML file.

     Alternatively, click the **Browser** button to display the **Save As** dialog. Navigate to the required location and enter a **File name**. Click the **Save** button to return to the **Run a Screen Based Report** dialog.

3. Click the **OK** button to produce the report.

10 | Using the PageOne Connect Web Messaging Portal

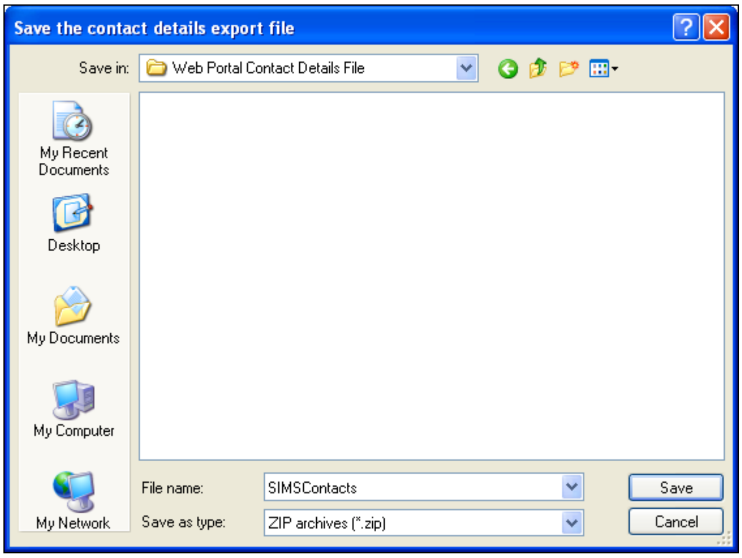
Introduction

The PageOne Connect Web portal is a secure, web-based messaging account that enables SIMS InTouch customers to upload contact information from SIMS. It also enables the selection and sending of text messages to staff, pupil/students and parental contacts of pupil/students. This is particularly useful when working off-site or do not have access to SIMS (e.g. during a school closure that is caused by inclement weather conditions).

This chapter assumes that your school exports contact details from SIMS and uploads them to the PageOne Connect Web portal (please see *Exporting Contact Information from SIMS InTouch* on page *194*).

Exporting Contact Information from SIMS InTouch

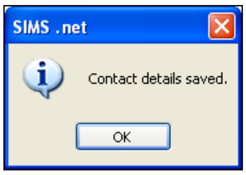
1. Log into SIMS as a user with System Manager permissions.
2. Select **Routines | Data Out | InTouch | Export Contact Details** to display the **Save the contact details export file** dialog.



3. Navigate to a secure location to which you want to save the export file.
4. Enter a unique and recognisable **File name** for the export file.
5. Click the **Save** button to export the file.

   The file is saved with a `.zip` extension. A confirmation message is displayed once the export is complete.

   > *NOTE: Do not upload the `.zip` file produced by the export routine in SIMS to the PageOne Connect Web portal; instead, you must unzip the export file and upload the resulting `.xml` file.*



6. Log into the PageOne Connect Web portal upload the exported file (please see *Uploading SIMS Contact Details to the PageOne Connect Web Portal* on page *196*).

Logging in to the PageOne Connect Web Portal

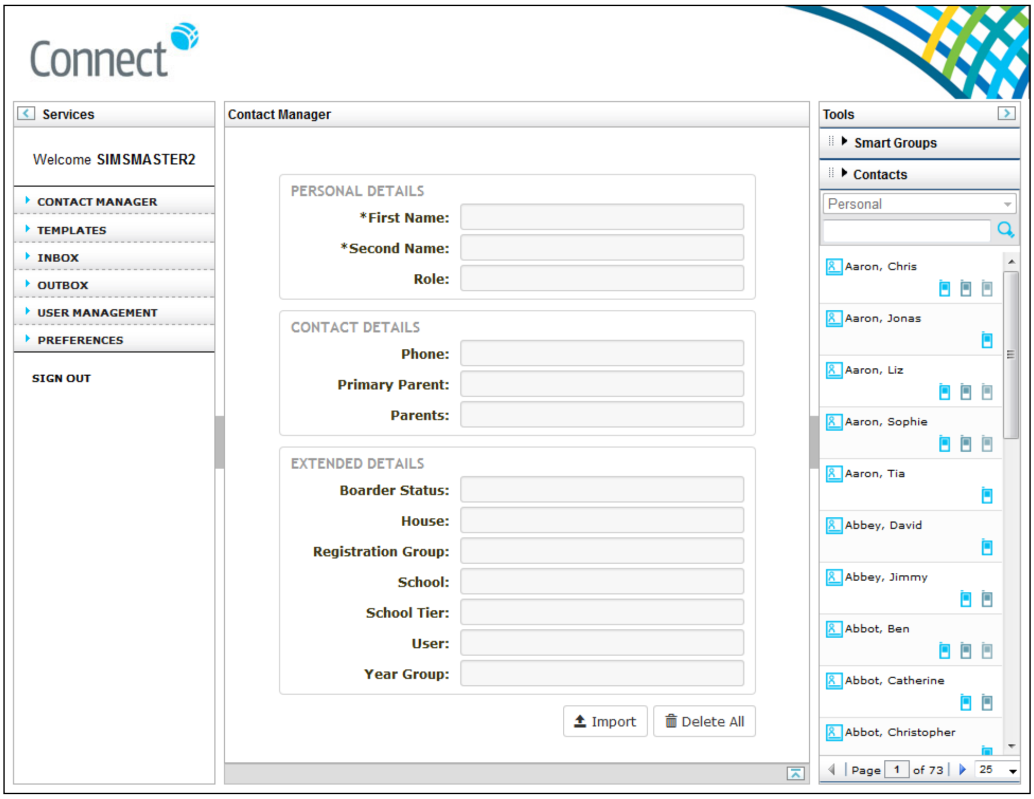
The PageOne Connect Web portal is a secure, web-based messaging account that enables you to import SIMS contact details from SIMS, and to select and send text messages when you are off-site or do not have access to SIMS.

Each registered school/establishment is allocated a Connect 'master' admin account with specific user name and password credentials. The master admin account enables you to:

- import SIMS contact information.
- check current SMS credits and order new SMS text message blocks.
- create and edit user accounts (these are accounts that can send messages via the Web portal).
- create and edit message templates.
- view the message log of all accounts.

The standard login page can be accessed here (http://www.pageone.co.uk/login). An alternate (or secondary) login page can be accessed here (https://www.oventus.com/oventus/authenticate).

Enter your allocated **Username** and **Password** and click the **Log In** button to open a secure, authenticated session.



The main menu items are displayed in the **Services** panel on the left-hand side of the page. Any contacts that have already been imported are displayed on the **Contacts** tab in the **Tools** panel on the right-hand side of the page. If you have not yet imported contacts, the **Contacts** tab will be empty.

The **Services** and **Tools** panels can be hidden by clicking the adjacent chevron. To display a hidden panel, click the chevron again.

Logging out of the PageOne Connect Account

To log out of the PageOne Connect Web portal, click the **SIGN OUT** button at the bottom of the **Services** panel.

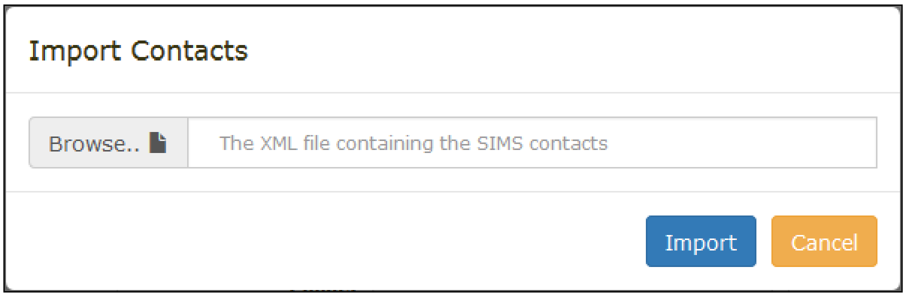
Uploading SIMS Contact Details to the PageOne Connect Web Portal

When you log in to the PageOne Connect Web portal using the master account, it is possible to upload the SIMS InTouch contact file previously exported from SIMS InTouch (via **Routines | Data Out | InTouch | Export Contact Details**). Uploading a contact file enables the sending of messages to SIMS contacts when you are off-site or do not have regular access to SIMS.

> ***IMPORTANT NOTE:*** *Do <u>not</u> upload the `.zip` file produced by the export routine in SIMS to the PageOne Connect Web portal; instead, you must unzip the export file and upload the resulting `.xml` file.*

If you do not upload contact details previously exported from SIMS InTouch, it is still possible to send messages but the mobile numbers will have to be entered manually.

1. In the menu on the left-hand side of the page, click **CONTACT MANAGER** to display the **Contact Manager** page.
2. Click the **Import** button to display the **Import Contacts** dialog.



3. Click the **Browse** button, navigate to the location of your SIMS contact export file (the `.xml` file), highlight it, then click the **Open** button to return to the **Import Contacts** dialog.
4. Click the **Import** button to upload the selected contact details file to the Web portal.

> ***IMPORTANT NOTE:*** *Do <u>not</u> refresh your Web browser while the contact file is being uploaded to the Web portal.*

5. When the contact details file has been imported successfully, a message is displayed.

   If the file has imported successfully, the contact list should be displayed on the **Contacts** tab on the right-hand side of the page.

If a message indicating that an error has occurred during the upload process is displayed, re-run the upload process. If this does not work, you are advised to log out of your account, log back in and attempt the import process again. If the problem persists, please contact your Local Support Unit.

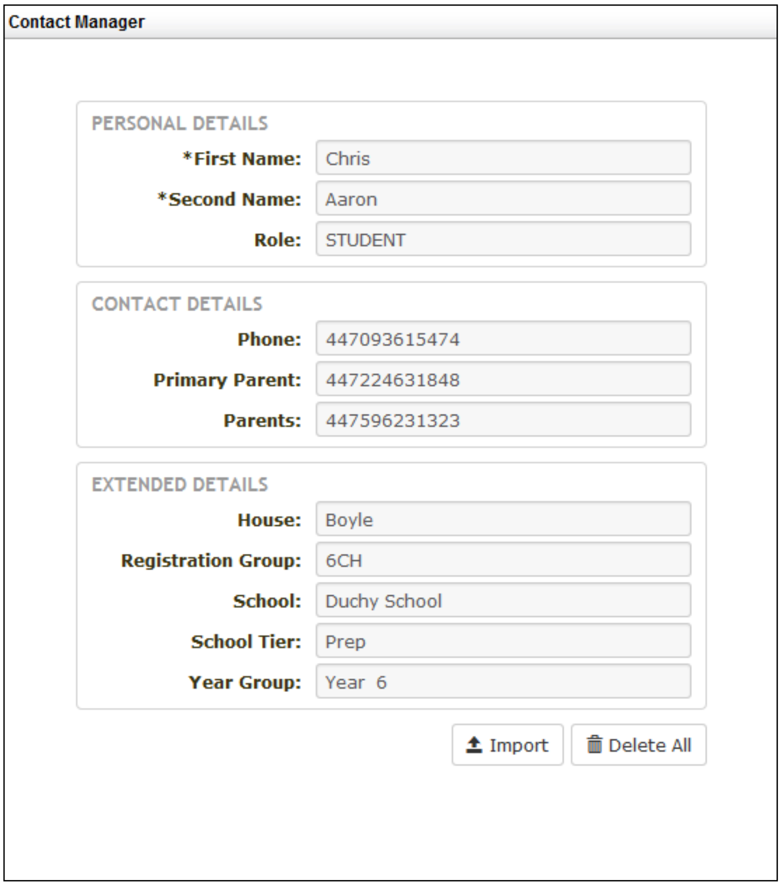
IMPORTANT NOTE: *Each time you upload a new version of the SIMS contact data file to the PageOne Connect Web portal, all existing contact details are overwritten.*

How SIMS Contact Data is Stored

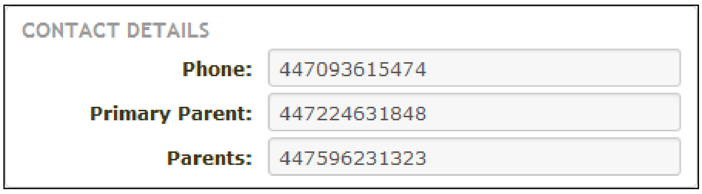
The PageOne Connect Web portal will import SIMS contact data and store individual contact records, together with fields for specific roles and groups, and the relevant contact numbers associated with that contact.

When the SIMS contact export file is uploaded to the PageOne Connect Web portal, individual contact records are created in the portal, together with fields for specific roles and groups, and the relevant contact numbers associated with each contact.

An individual contact's record can be viewed by clicking **CONTACT MANAGER** in the menu on the left-hand side of the page and then clicking an individual contact on the **Contacts** tab on the right-hand side of the page. Alternatively, use the **Search** field to locate a specific contact. The panel in the centre of the **Contact Manager** page displays the individual contact record details.



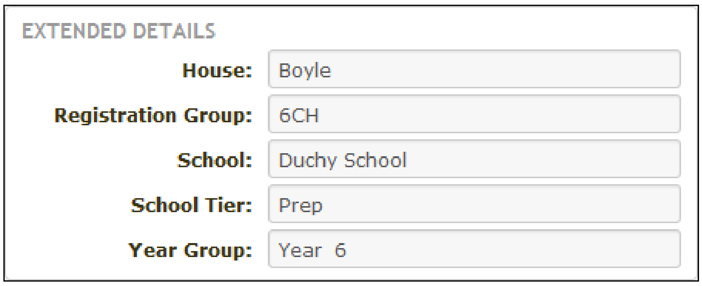
When the SIMS contact export file is uploaded to the PageOne Connect Web portal, various mobile numbers are stored in the portal, as displayed in the following graphic.



- **Phone** - this is the primary mobile number of the contact, i.e. the pupil/student's or staff member's own mobile number.
- **Primary Parent** - this is the mobile number of the primary parental contact for the pupil/student.
- **Parents** - these are the mobile numbers of all registered parents for the pupil/student.

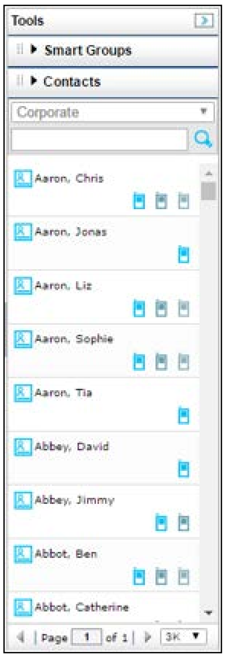
> ***IMPORTANT NOTE:*** *Text messages sent to landline numbers are sent using a text-to-speech service. The caller will be prompted to press* ***1*** *to listen to the message.*

Fields are created automatically for the standard groups in SIMS, together with any other groups that may have been created in the **Extended Details** section of a contact record, as displayed in the following graphic.



Contacts List

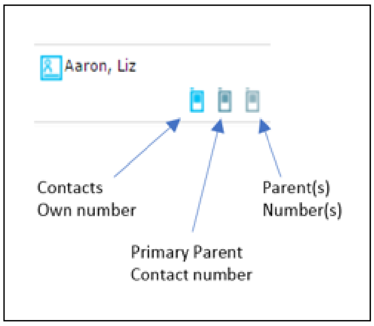
The imported contacts are displayed on the **Contacts** tab on the right-hand side of the page. The list is paginated and you can use the **Search** box to search for a contact by name.



Up to three contact number icons are available for each contact.

> *TIP: Hover over a contact number icon to view the mobile number.*

On the **Compose Message** page, click a contact's icon to send a message to that specific number. Alternatively, click multiple numbers for a contact to send a message to all their numbers.



User Management - Creating and Editing New User Accounts

Each registered school/establishment is allocated a PageOne Connect 'master' admin account with specific user name and password credentials. The master admin account includes the **USER MANAGEMENT** tab, which enables you to:

- import SIMS contact information
- check current SMS credits and order new SMS text message blocks *
- create and edit user accounts (these are accounts that can send messages via the Web portal)
- create and edit message templates
- view the message log of all accounts.

* Dependent on the SMS tariff option to which you have subscribed.

For security purposes, you must re-enter the username and password credentials for your account to access User Management function.

User Accounts

User accounts are created and edited using the master admin account. It is possible to create up to 10 user accounts for people who may want to use the PageOne Connect Web portal to send SMS messages when their SIMS system is unavailable.

Each user account has its own login credentials; any messages sent from a user account will be logged as being sent from that account.

From the master account, you can see <u>all</u> messages, from <u>all</u> accounts.

> *NOTE: All messages are chargeable against your master account.*

In the menu on the left-hand side of the page, click **USER MANAGEMENT**.

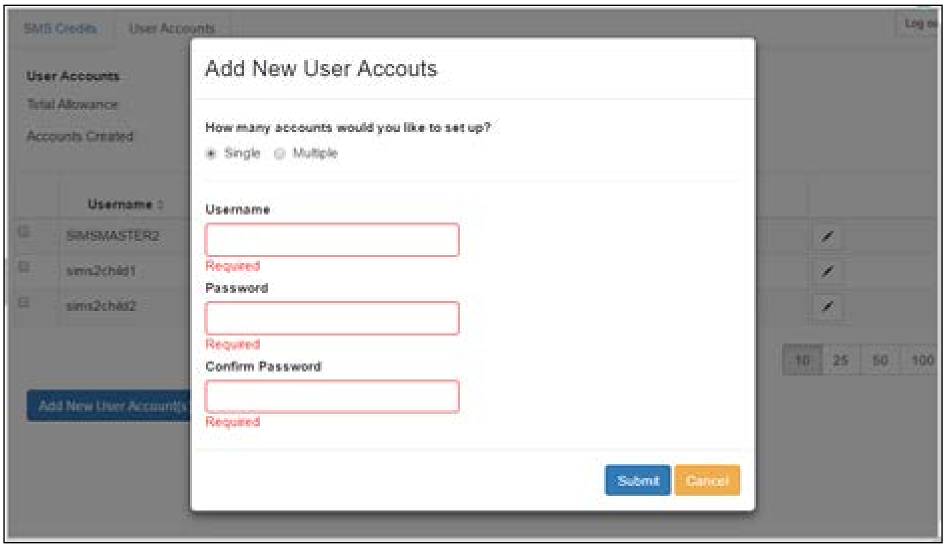
Select the **User Accounts** tab to display a list of all current accounts, together with the number of accounts that have been created (**Accounts Created**) from your **Total Allowance**.

The following account information is also displayed:

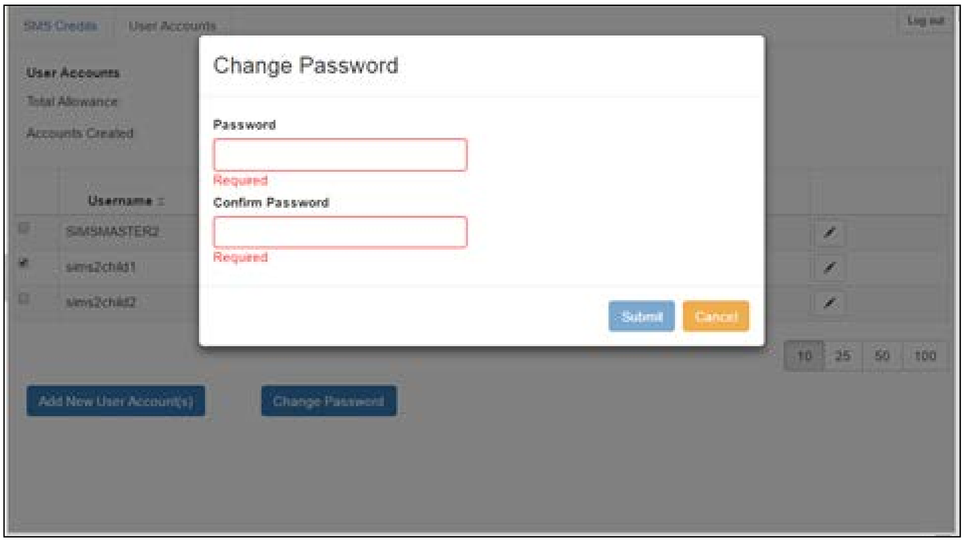
Username	This is the unique username that is used to log in to the Connect account
User Id	A unique reference ID for the account. Please note that the master account is displayed at the top of the list. Master accounts have a **User Id** beginning 1nnnnnnn. User accounts have a **User Id** beginning 5xxxxxxx.
Status	This is set to either **Active** or **Suspended**. To suspend an account (to prevent it from sending messages), click the **Active** button and select **Suspended**.
Alpha Tag/MSISDNs	This displays the virtual mobile number assigned to your account.
Notes	This field can be used for your own comment against an account, e.g. to record to whom you have allocated the account. Click in the field and amend the text, if required.

Other User Account Options

Add New User Account(s) – enables the creation of new user accounts by specifying a **Username** and **Password**.

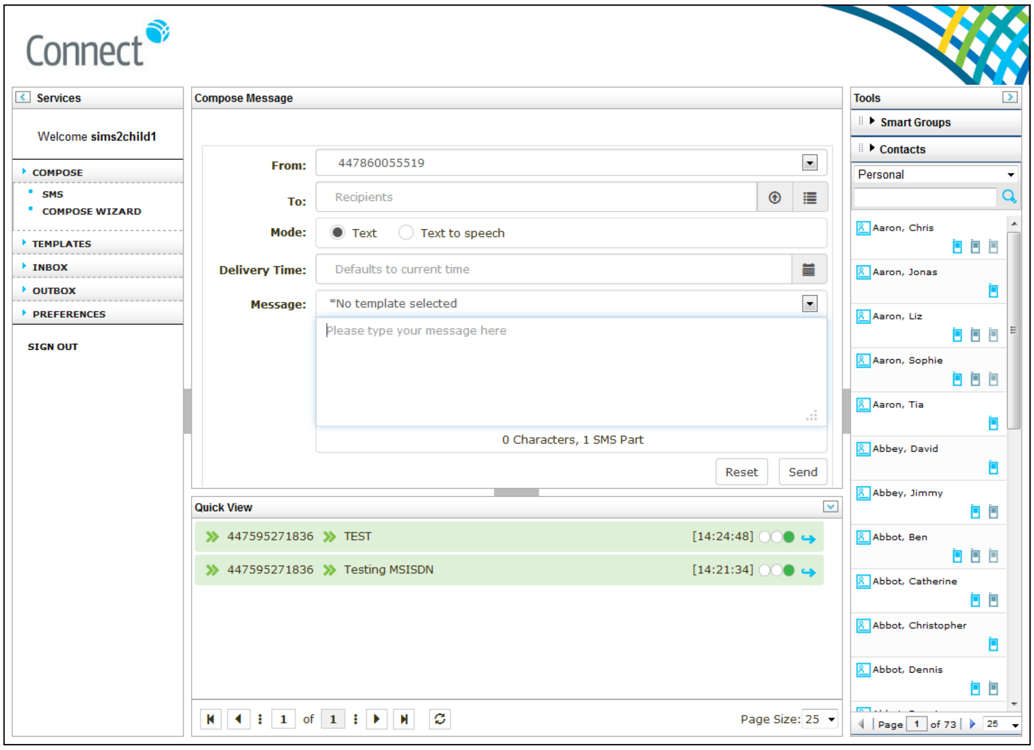


Change Password - select the check box of the **Username** for which you want to change the password, click the **Change Password** button and enter the new **Password** and **Verify Password**.



Sending Text Messages

Text messages can be sent only from a user account; it is not possible to send them from the master admin account. User accounts have a **COMPOSE MESSAGE** function, which is displayed on-screen once you have logged in.



The **COMPOSE** option in the menu on the left-hand side of the page provides the option to send messages in the following ways:

- **SMS** - send a message manually to one or more recipients.
  a. Enter the mobile number in the **To** field. To send the message to more than one recipient, separate mobile numbers with a semi colon.

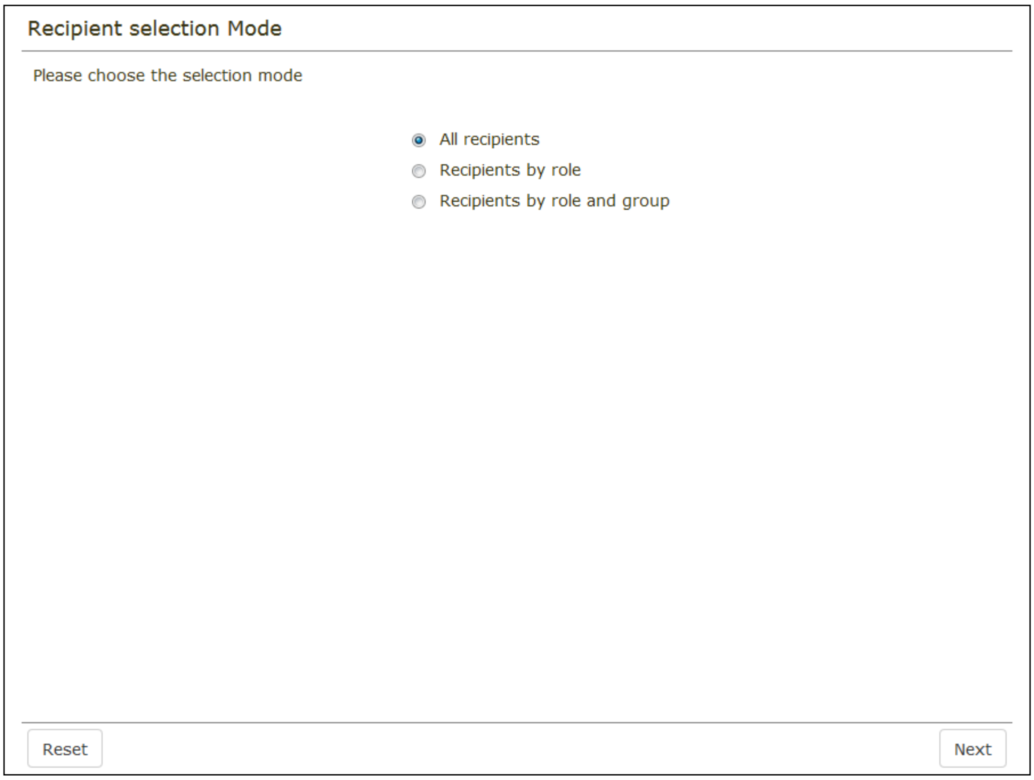
     Alternatively, use the **Contacts** tab on the right-hand side of the page to search for and select the required recipient(s).
  b. Enter the **Message** text, or select a pre-defined **Template** message from the drop-down list.
  c. Click the **Send** button.
- **COMPOSE WIZARD** – guides you through the process of sending a message using a wizard (please see *Using the Compose Wizard to Select and Send Messages* on page *203*).

Using the Compose Wizard to Select and Send Messages

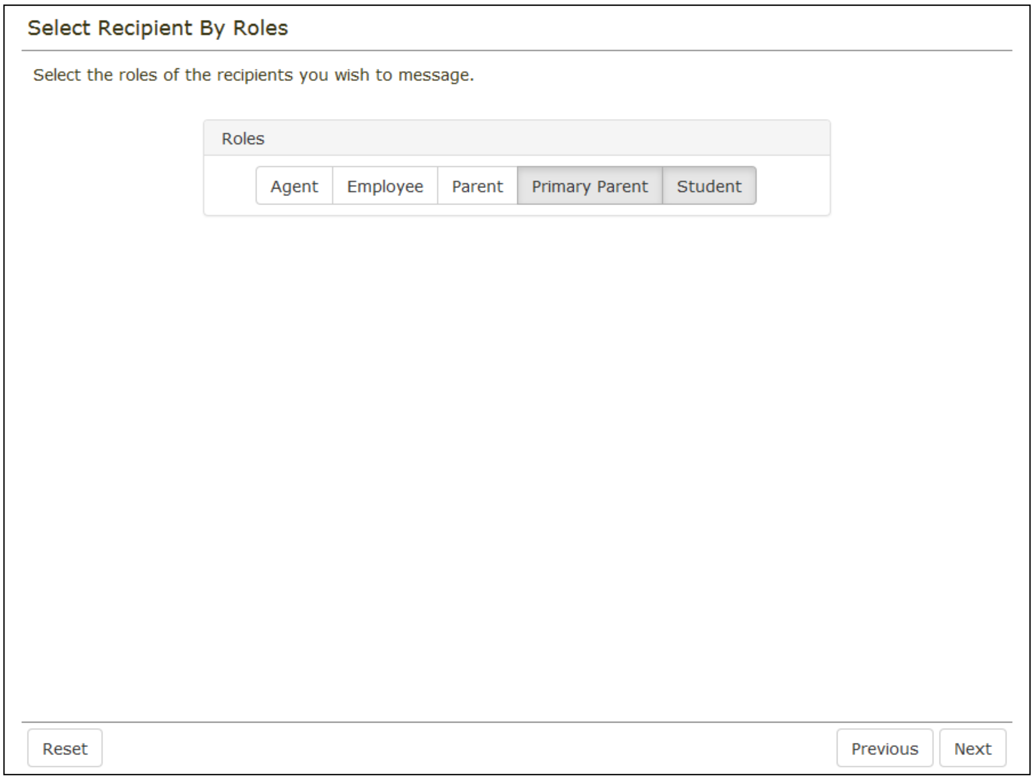
The **Compose** wizard provides a step-by-step process that enables you to select the intended recipients of a message from the imported SIMS contact list.

Step 1 - Selecting the recipients

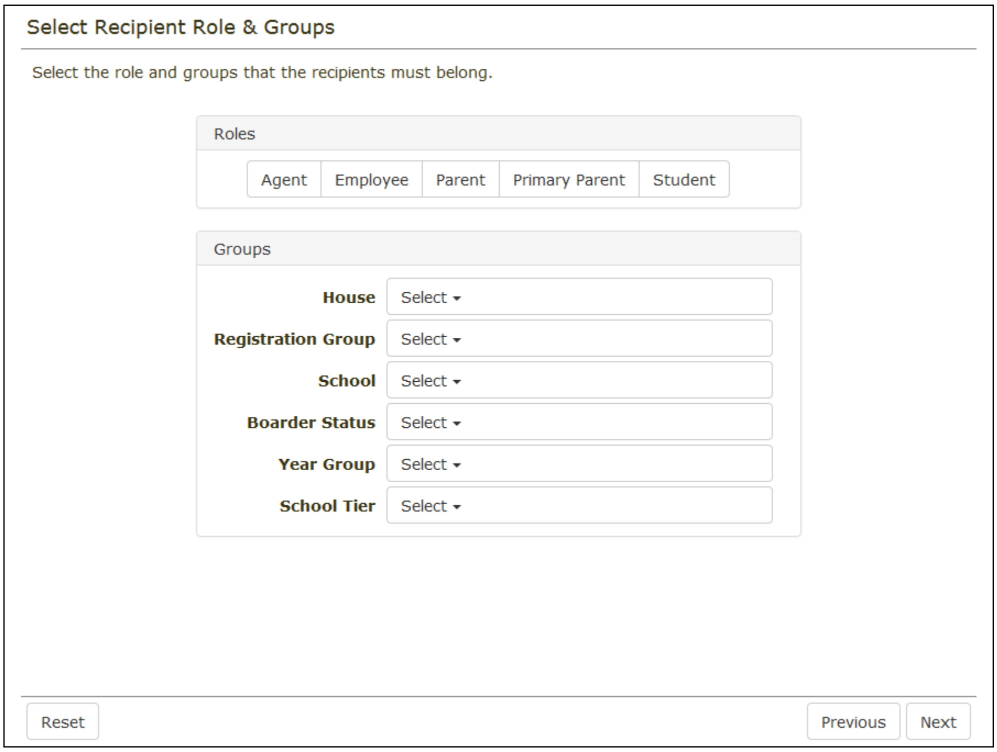
Select how you want to select the intended recipients.



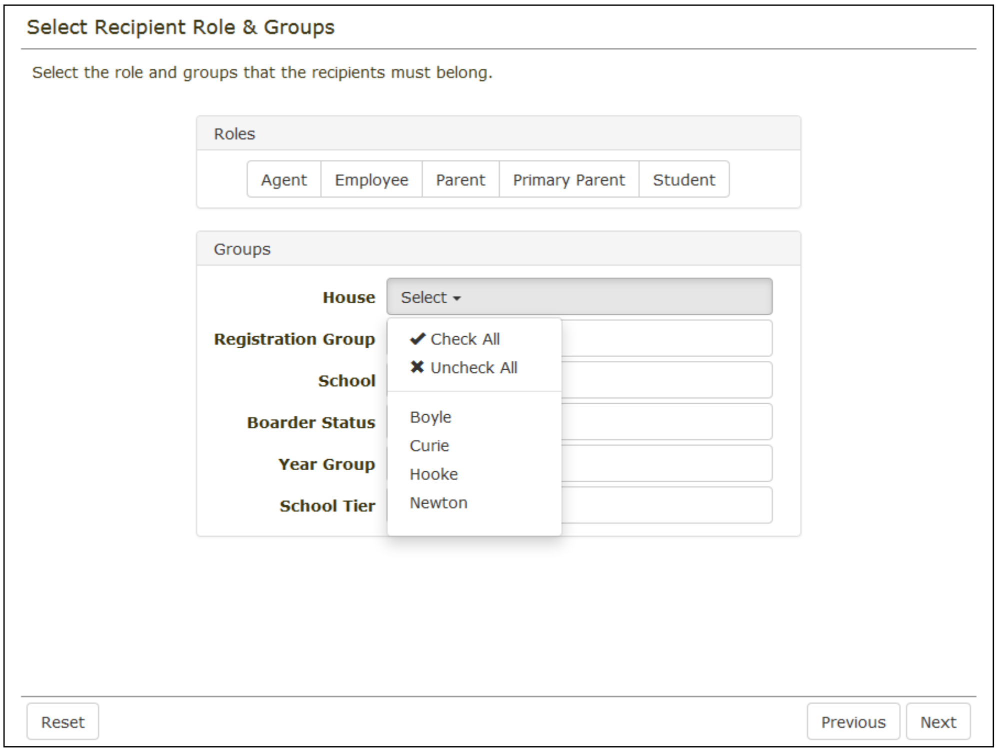
- Selecting **All recipients** sends a message to all of the contacts in the imported SIMS contact list.
- Selecting **Recipients by role** enables the selection of one or more roles to whom you want to send a message. This sends a message to all of the contacts registered against the selected roles. In the following example, **Primary Parent** and **Student** are selected.



- Selecting **Recipients by role and group** enables the selection of one or more roles, together with specific groups to whom you want to send a message. Select the required groups from the drop-down lists.

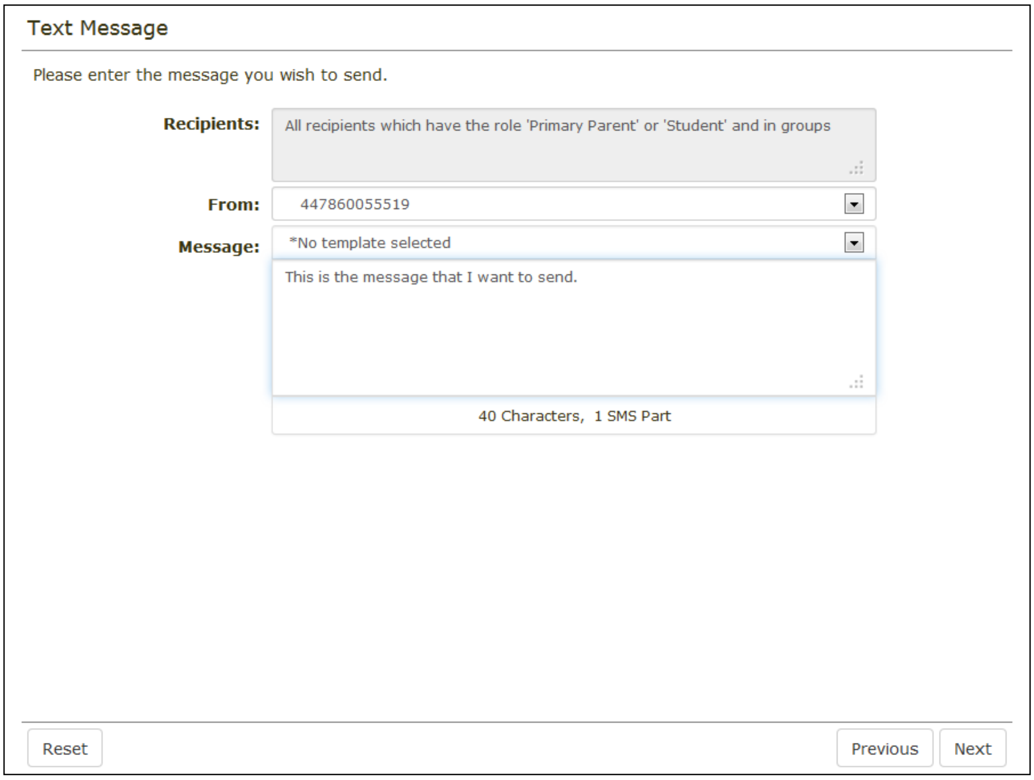


It is possible to select all groups (**Check All**), individual groups or a selection of groups.



Step 2: Entering the message text

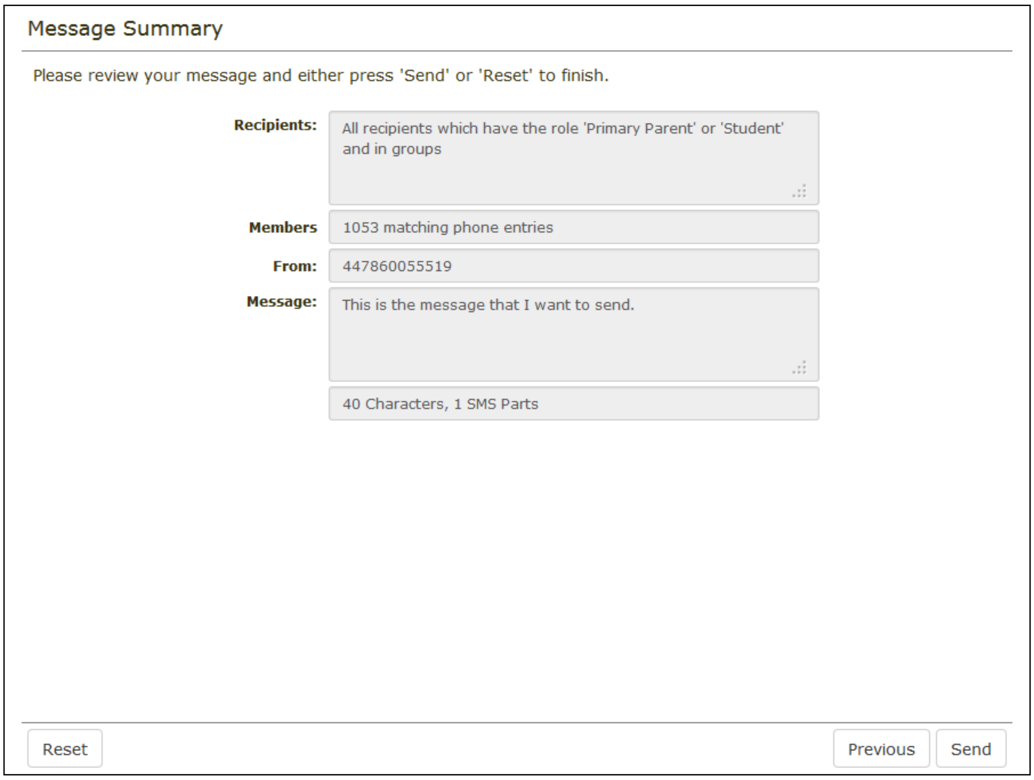
After selecting the recipients, enter the message text or select a pre-defined message template. As the message text is entered, the character count is updated, together with the number of chargeable SMS parts to which the message equates. Full details of how the number of message parts is calculated for SMS messages is available from the PageOne website (http://www.pageone.co.uk/sms-message-formatting-and-charging).



NOTE: The SMS text message will be sent 'from' the two-way virtual mobile number assigned to your account, as displayed in the ***From*** *field. This is also the number to which any replies are sent.*

Step 3: Reviewing the message summary

The **Message Summary** view enables the checking and reviewing of the message details, including the intended **Recipients** (i.e. the selected roles, groups, etc.) and number of **Members** to whom the message will be sent.



To revisit the previous pages of the wizard, click the **Previous** button, if required.

Click the **Send** button to send the message. Alternatively, click the **Reset** button to cancel the process.

When the message is sent, the **Message Accepted** confirmation is displayed. To view a log of the individual messages sent, click the **OUTBOX** option in the menu of the left-hand side of the page.

Message Recipients and Message Parts

The **Compose Message** page provides the following information <u>before</u> the message is sent.

- Number of recipients (i.e. individual numbers to which the message will be sent)
- Number of message parts – a standard SMS text message consists of up to 160 characters. Longer messages, or those that include extended or international characters, might reduce the number of characters per message part.
- A warning (in red) if your message text includes any extended or international characters. The use of such characters increases the number of chargeable message parts.

> *NOTE: If you are copying message text from another application and pasting into the **Compose Message** page, ensure that you use the 'paste as plain text' function to prevent any control and formatting characters from being copied; control and formatting characters will be seen as extended characters, therefore reducing the number of message parts.*

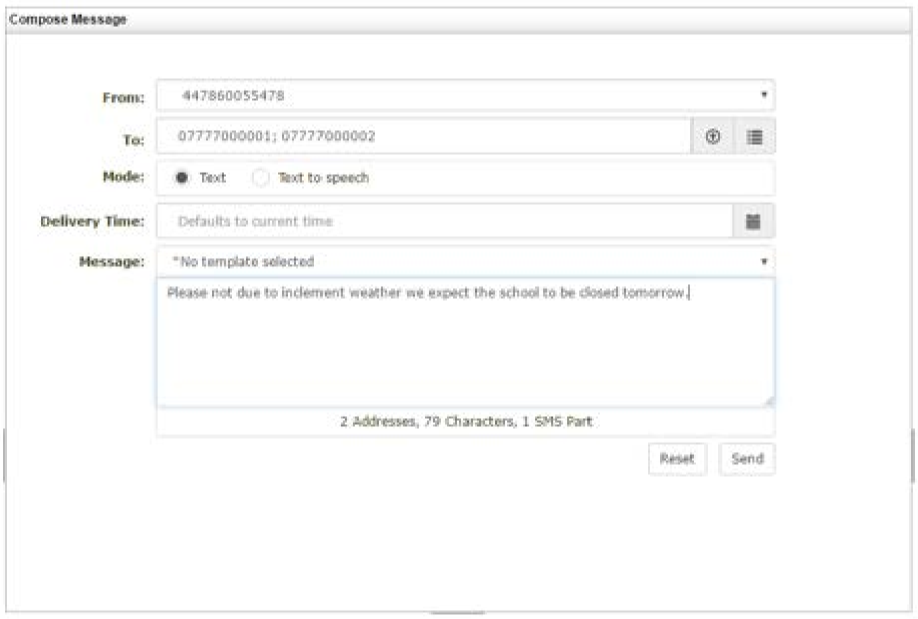
Full details of how the number of message parts is calculated for SMS messages is available from the PageOne website (http://www.pageone.co.uk/sms-message-formatting-and-charging).

Sending Messages to Mobiles not in the Contact List

It is possible to send messages to mobile numbers that are not stored on the PageOne Connect Web Messaging Portal.

From the **Compose Message** page, you can enter one or more mobile numbers directly in the **To** field.

> *NOTE: If you are entering more than one number, separate each number with a semi-colon (;).*



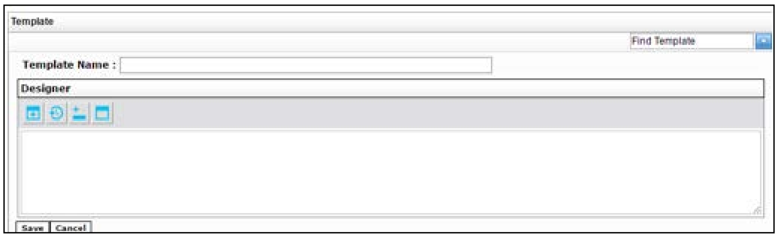
Alternatively, you can upload a CSV file that contains a list of mobile numbers exported from SIMS by clicking the **Upload** button.

To view a list of the uploaded numbers, click the **List of Recipients** button.

Templates - Creating and Saving Template Messages

Your master account includes a **TEMPLATES** option for creating and editing standard message templates, which will then be available from the **Templates** drop-down list on the **Compose Message** page of all user accounts.

1. To create a new template, click **TEMPLATES** in the menu on the left-hand side of the page and then click the **Add New Template** button at the bottom of the page.

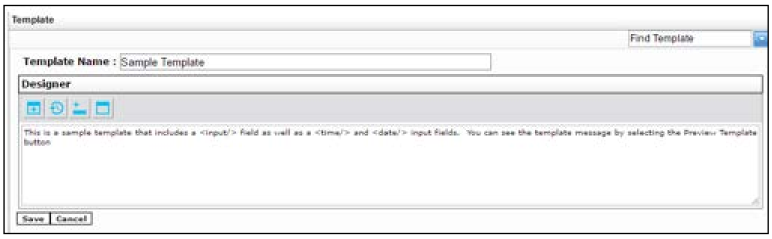


2. Enter a **Template Name**. This is the name displayed in the template drop-down list on the **Compose Message** page.
3. Enter the message text in the **Designer** panel. Text, date and time fields can be added to the template message.

Insert Date Field button

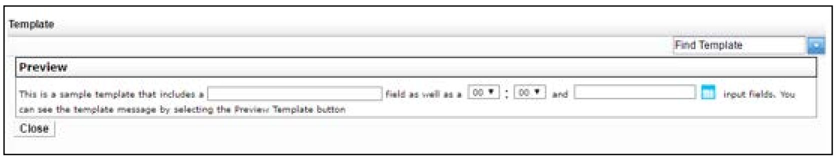
Insert Time Field button

Insert Input Field button

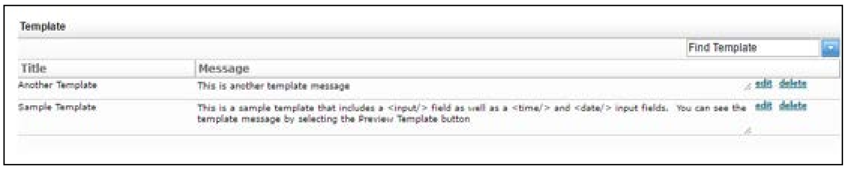


4. Click the **Preview Template** button to view the template message.

Preview Template button



5. Close the preview view and click the **Save** button.



The new template is now available from the template drop-down list on the **Compose Message** page, from where it can be edited and deleted.

Message Outbox

The **OUTBOX** option in the menu on the left-hand side of the page displays a log of all messages sent. The master account **OUTBOX** displays all messages sent via SIMS InTouch and any messages sent via the PageOne Connect user accounts. The **OUTBOX** in individual user accounts displays messages sent from that individual user account only.

The delivery **Status** indicator uses a traffic light indicator to show the delivery status of messages.

- Green – indicates that the text message has been delivered to the mobile handset.
- Yellow – indicates that the text message is pending, awaiting confirmation of delivery.
- Red – indicates that the sending of the text message has failed or the mobile number is invalid.

A filter option enables the creation and saving of filter rules.

The **Report** button enables you to select a date range (up to last 90 days) for the following message reports and exports, and to export them to Microsoft Excel as a CSV file.


Report button

- All Messages – displays a log of all individual messages.
- Account Summary Report – displays a summary of messages per user account.
- Message Count by Date – displays a summary of messages per day.
- Invalid address report – displays a log of all failed or invalid numbers.

NOTE: When logged in to a user account, messages sent from that account can be viewed in the Outbox. The Outbox of the master admin account displays <u>all</u> messages from <u>all</u> user accounts, together with any messages sent directly via SIMS InTouch.

Message Inbox

The **INBOX** option in the menu on the left-hand side of the page displays a log of all inbound text messages, together with replies received to the virtual mobile number assigned to your school.

From	To	Message	DateTime
447788924555	447860055478	Unfortunately I will be unable to attend parents evening next week. Kind Regards, John Dunn, parent of Sarah Dunn, Year 3	2017-03-09 11:16:22

The filter options enable you to create and save filter rules.

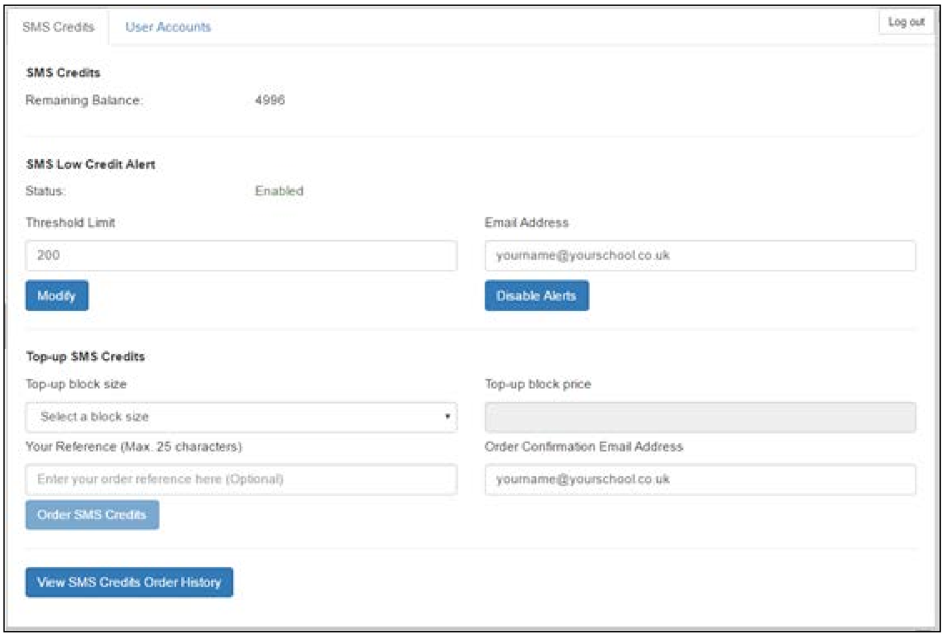
SMS Messages - Checking SMS Balances and Ordering new SMS Blocks

Depending on the tariff option for your account, the PageOne Connect Web Messaging master account may enable you to check the current SMS balance and order a new SMS block. These functions are restricted to your master admin account and are accessed via the **USER MANAGEMENT** tab. For security purposes, you will need to re-enter your **Username** and **Password** to access these functions.

1. In the menu on the left-hand side of the page, click **USER MANAGEMENT**.
2. Enter your **User** name and **Password**.
3. Click the **SMS Credits** tab.

The following options are available:

- View the current SMS credit balance (**Remaining Balance**)
- Set up SMS low credit alerts, enabling you to receive an email alert when the SMS balance reaches a pre-defined figure.
- Top up SMS Credits by ordering a new SMS block. Please note that when you order a new SMS block, it will be credited to your account immediately, and an invoice will be generated and sent to your school/establishment.



SMS Credits

This displays the current number of SMS credits available on your account.

> ***IMPORTANT NOTE:*** *It is possible to send text messages only if you have sufficient SMS credits at the time of sending. SMS credits can be topped up at any time by ordering a new SMS block (please see* Top-Up SMS Credits *on page* 212*).*

New SMS block credits are credited to your account immediately and are valid for 12 months from the time of ordering.

SMS Low Credit Alert

This displays any current low credit alerts that have been set up, including the threshold limit and the email address to which the alerts will be sent.

To add a low credit alert, enter the **Threshold Limit** (i.e. the SMS balance at which the alert will be triggered) and an email address to which the alerts should be sent. Click the **Modify** button.

Notifications can be enabled or disabled. To amend the low credit alert, enter a new **Threshold Limit** and an email address, then click the **Modify** button.

An SMS low credit alert email will be sent to the selected recipients if your SMS credit reaches the threshold limit.

Top-Up SMS Credits

It is possible to order SMS blocks, which are added to your SMS credit balance immediately.

1. Select the required **Top-up block size** from the drop-down list. The adjacent **Top-up block price** is updated automatically.
2. Enter **Your Reference**, if required. This could be a purchase order number or another internal reference.
3. Enter the **Order Confirmation Email Address**. The SMS top-up email confirmation will be sent to this address.
4. Click the **Order SMS Credits** button.

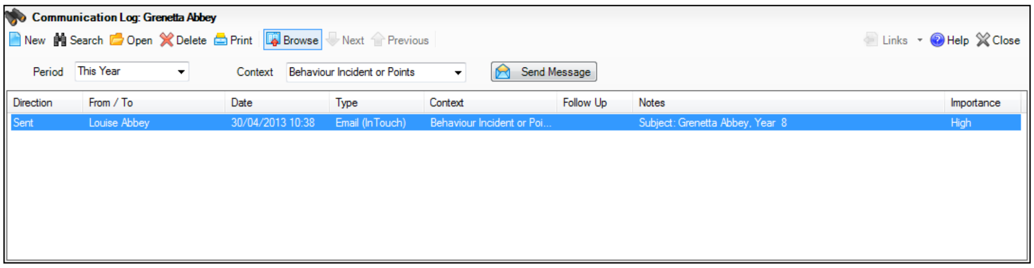
   The new SMS block credits are credited to your account and can be used immediately.

   Your top-up order also generates an invoice to your school/establishment, which will be payable as per the PageOne terms and conditions.

11 | Additional Information

Viewing the Communication Log

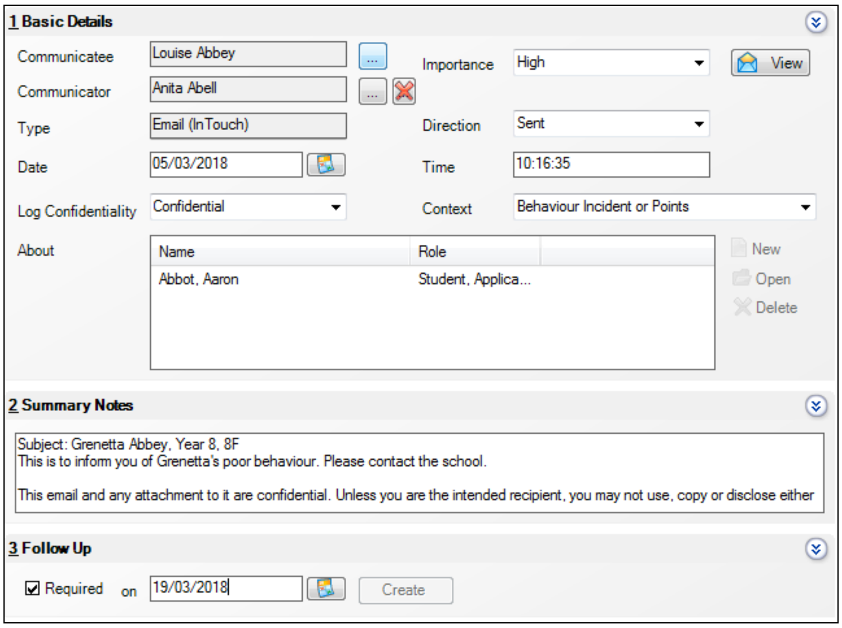
1. Select **Focus | Pupil** (or **Student**) **| Pupil** (or **Student**) **Details** to display the **Find Student** browser.
2. Search for then select the pupil/student whose communication log you wish to view.
3. In the **Links** panel on the right-hand side of the page, click the **Communication Log** hyperlink to display the **Communication Log** browser.



This page displays all of the recorded communications that relate directly to the selected pupil/student.

4. Search for the required communication record by selecting the **Period** over which a communication has been recorded, e.g. **This Year**, and the **Context** of the message, e.g. **Behaviour Incident or Points**, from the drop-down lists.

5. Highlight the required communication then click the **Open** button to display its details on the **Communication Details** page.



6. The majority of the information displayed is read-only but the **Log Confidentiality** can be amended, if required.
7. To view the content of the original message, click the **View** button to display the **Review a Message** page.

More Information:
Viewing Received Messages on page *74*

Setting Up Message Options

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

2. If you wish to **Display an alert when a new message is received**, select the check box in the **Options for high priority messages** panel.
3. Enter the amount of time, in seconds, that you want the alert to be displayed in the **The pop-up alert will be displayed for** field.
4. If you wish to **Play a sound alarm** when a high priority message is received, select the check box.

Tidying the Content of a User's SIMS Message Inbox

Applicable to users with System Manager permissions only

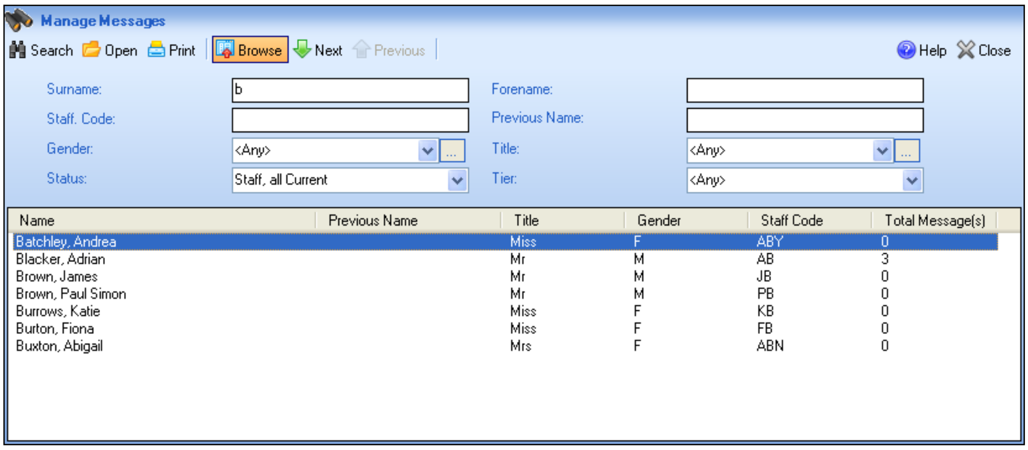
The System Manager can delete messages sent to other SIMS users, to help to prevent mailbox full warnings from being displayed. You may also choose to include this as part of your general SIMS housekeeping process, to tidy the inbox of all members of staff (current and leavers). Once messages have been deleted they are recorded in the audit log, so a record of deleted messages can be maintained. The log can be exported, if required.

*NOTES: This process deals solely with the deletion of messages received by a SIMS user (i.e. messages in a user's **Inbox**, accessible from the **Messages** panel on the SIMS **Home Page** or via **Focus | InTouch | Show Messages**). It does not delete messages sent by a SIMS user, neither does it delete messages sent to or from your school.*

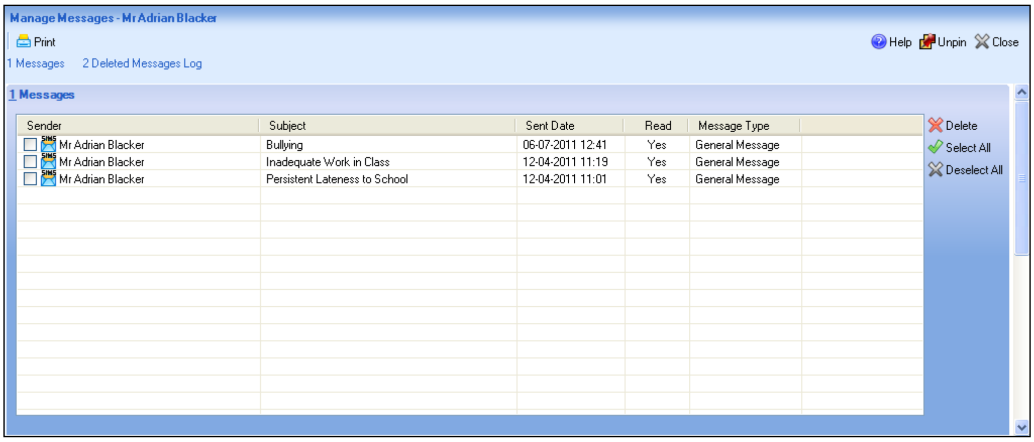
For privacy reasons, it is not possible to read the content of the messages displayed.

WARNING: *This process is irreversible and therefore it must be carried out with caution. Any messages that have been deleted cannot be retrieved.*

1. Select **Tools | Housekeeping | Manage Messages** to display the **Manage Messages** browser.
2. Enter any combination of the staff member's **Surname**, **Forename**, **Staff. Code** and **Previous Name**. Additional search criteria is available from the drop-down lists. Alternatively, leave the search criteria blank if you do not wish to apply a filter.
3. Click the **Search** button to display all members of staff who match the search criteria specified. The **Total Message(s)** column displays the total number of messages in a user's Inbox (i.e. an aggregate of unread and read messages).



4. Highlight the user whose messages you wish to tidy then click the **Open** button to display the **Manage Messages** page.



The **Messages** panel displays all the messages that are currently held in the selected user's Inbox. The **Sender**, the **Subject** line, the **Sent Date**, an indication of whether or not the message has been **Read** and the **Message Type** are displayed for each message.

The content of the **Messages** panel can be printed, if required.

TIPS: Before printing, ensure that the width of the columns is set appropriately because the column width selected on-screen will be mirrored on the printed output. For the same reason, also ensure that the sort order displayed on-screen is appropriate for the printed output.

You are advised to produce the output in landscape format to ensure that all the fields displayed on-screen are included on the output.

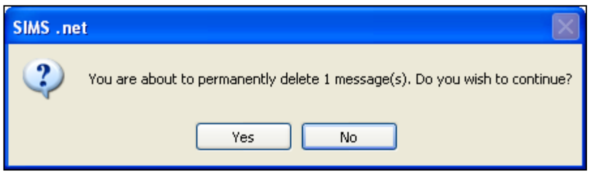
*The content of the **Deleted Messages Log** panel, described later in this topic, is also printed on the same output.*

To print the list of messages, select the check box adjacent to each message you wish to include on the output then click the **Print** button to display the standard Windows® **Print** dialog. Select the appropriate print options then click the **OK** button to produce the output.

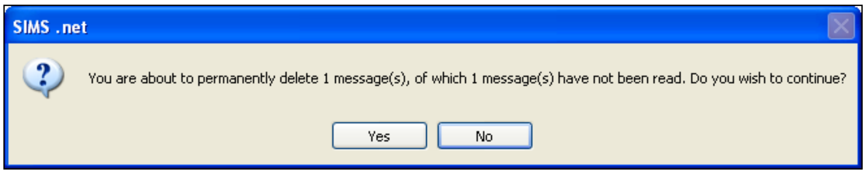
5. Select the check box adjacent to each message you wish to delete. Alternatively, use **Shift + click** or **Ctrl + click** to select a block of messages or selective messages respectively. Additionally, the **Select All** button and the **Deselect All** button can be used for global selection and deselection.

6. Click the **Delete** button. You are prompted to confirm the deletion of the selected message(s).

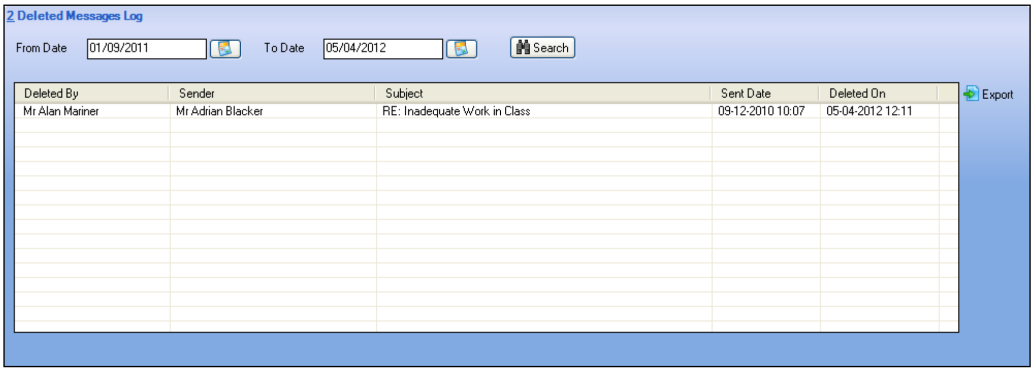
   If you have selected to delete one or more <u>read</u> messages, the following message is displayed.



If you have selected to delete one or more messages, including at least one unread message, the following message is displayed.



7. Click the **Yes** button to delete the selected message(s). The deleted message(s) are displayed in the **Deleted Messages Log** panel.



The **Deleted Message Log** panel, which acts as an audit log, displays all the messages that have been deleted from the selected user's Inbox until the log is exported in **.**XML format, at which time the log is cleared. The user who deleted the message (**Deleted By**), the **Sender**, the **Subject** line, the **Sent Date** and the date on which the message was deleted (**Deleted On**) are displayed for each message.

8. The display of deleted messages defaults to the first day of the current academic year (**From Date**) to today's date (**To Date**) but can be changed by clicking the respective **Calendar** buttons and selecting the required dates. If you change either or both of the dates, click the **Search** button to refresh the display of deleted messages.

   The content of the **Deleted Messages Log** panel can be printed, if required.

   TIPS: Before printing, ensure that the width of the columns is set appropriately because the column width selected on-screen will be mirrored on the printed output. For the same reason, also ensure that the sort order displayed on-screen is appropriate for the printed output.

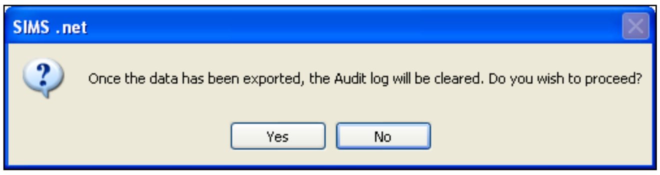
   You are advised to produce the output in landscape format to ensure that all the fields displayed on-screen are included on the output.

   *The content of the **Messages** panel, described earlier in this topic, is also printed on the same output.*

   To print the list of messages, click the **Print** button to display the standard Windows® **Print** dialog. Select the appropriate print options then click the **OK** button to produce the output.

The audit log can be exported in .XML format. Once the log has been exported, it will be removed from the **Deleted Messages Log** panel.

9. Click the **Export** button to export the audit log. You are prompted to confirm the export and you are advised that once the data has been exported, the audit log will be cleared.



10. Click the **Yes** button to display the standard Windows® **Save As** dialog.
11. Navigate to the required location and enter a **File name**. The file type defaults to .XML and cannot be changed.
12. Click the **Save** button to save the output and to remove all messages from the **Deleted Messages Log** panel.

What Happens if SIMS Cannot Immediately Send a Message to an External Source?

Messages that cannot be sent immediately, perhaps because of a failure in the messaging service, can be queued and re-sent automatically when the issue is resolved. SIMS attempts to resend a queued message every five minutes until it is sent or until the message expires.

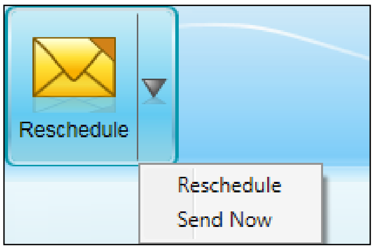
If you have any messages queued, they are accessible via the **Queued Messages** panel on the maximised **Messages** panel on the SIMS **Home Page**. The content of the **Messages** panel can also be displayed by selecting **Focus | InTouch | Show Messages**. This panel is displayed between the **Inbox** and **Sent** panels.

> *NOTE: The **Queued Messages** panel is displayed <u>only</u> if you have one or more queued messages.*

A queued message can be opened in read-only mode by highlighting it then clicking the **Open** button, from where you can attempt to resend it manually.

a. Select the required queued message.
b. Click the **Open** button adjacent the **Queued Messages** panel to display the **Review a Queued Message** page.

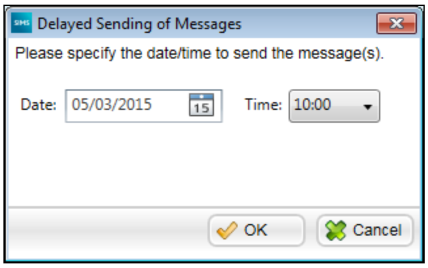
c. Click the down arrow adjacent to the **Reschedule** button and select the **Send Now** option from the pop-up menu.



A queued message can be deleted by highlighting it then clicking the **Delete** button.

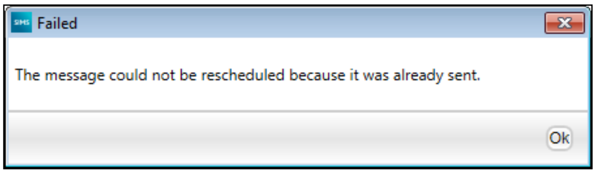
If you attempt to close SIMS with one or more messages still queued, you will be asked to confirm that you wish to exit.

It is also possible to reschedule the sending of a message by clicking the down arrow adjacent the **Reschedule** button and selecting **Reschedule** from the pop-up menu. In the **Delayed Sending of Messages** dialog, select the **Date** and **Time** for the resending of the message.



*NOTE: The **Date** and **Time** on the **Delayed Sending of Messages** dialog default to the assigned scheduled date and time of the message.*

***IMPORTANT NOTE:** If you select to reschedule a queued message that has already been sent in the background, a message is displayed, stating that the message has already been sent.*



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