# 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 <i>What's new in this release</i> ?	29/05/2019

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#### publications@capita.co.uk

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



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#### 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 <u>all</u> 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.

#### 01 | Introduction to InTouch

1

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 <b>Home Page</b> , click a SEN reminder in the <b>My Reminders</b> 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/S	tudent 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.

#### 01/ Introduction to InTouch

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 <u>from anywhere in SIMS</u>, 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

(<u>https://myaccount.capita-cs.co.uk</u>). 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.

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### 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 <u>not</u> 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.

#### 02 | Updating Primary Contact Details

Lontacts	Prio Name		Relationship	Court	Order   InTou	ch Telephor	📄 New		
	🚮 1 Mrs Rac	🚮 1 Mrs Rachael Abbot			Mother 456 1091				
	🚮 2 🛛 Mr Franc	is Abbot	Father	Father					
	3 Mrs Ann	a GOULD-HARPER	Other Contac	et		456 1080	💢 Delete		
							📄 Сору		
	<						📄 Clone		
Parental Salutation	Mr and Mrs Abbot	6	Parental A	ddressee	Mr and	d Mrs F Abbot	9		
Mallina Data	_								
Mallind Point									
Mailing Point									
Mailing Point	Name	Date of Birth	Year Reg	Gender	Date of Ad	Date of Le 🔨			
Mailing Point Family Links	Name Abbot, Carmella	Date of Birth 22/06/1984 (1	Year Reg 13) (G)	Gender Female	Date of Ad 04/09/1995	Date of Le 🔨			
Maning Point Family Links	Name Abbot, Carmella Abbot, Michael	Date of Birth 22/06/1984 (* 17/01/1986 (*	Year Reg 13) (G) 13) (G)	Gender Female Male	Date of Ad 04/09/1995 03/09/1997	Date of Le ^ 19/07/2002 23/07/2004			
Family Links	Name Abbot, Carmella Abbot, Michael Ablett, Joane	Date of Bitth 22/06/1984 (* 17/01/1986 (* 04/06/1987 (*	Year Reg 13) (G) 13) (G) 13) (H)	Gender Female Male Female	Date of Ad 04/09/1995 03/09/1997 08/09/1998	Date of Le ^ 19/07/2002 23/07/2004 22/07/2005			
Mailing Point	Name Abbot, Carmella Abbot, Michael Ablett, Joane Abbot, Clarissa	Date of Birth 22/06/1984 (* 17/01/1986 (* 04/06/1987 (* 22/06/1995 1	Year Reg 13) (G) 13) (G) 13) (H) 1 11A	Gender Female Male Female Female	Date of Ad 04/09/1995 03/09/1997 08/09/1998 05/09/2006	Date of Le.  19/07/2002 23/07/2004 22/07/2005			

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.

Contact details - Mrs Rachael Abbot         Save       ● Undo       ● Print         1 Basic Details       2 Relationship Details       3 Telephones and Email Addresses       4 Addresses       5 Language       6 Job Details       7 Documents         1 Basic Details       Itelephones and Email Addresses       4 Addresses       5 Language       6 Job Details       7 Documents         1 Basic Details       Itelephone       Mrs       Gender       Female       Image: Contact Responsibility       Female       Image: Contact Responsibility       Image: Contact Responsity       Image: Cont
Save Undo Print Basic Details 2 Relationship Details 3 Telephones and Email Addresses 4 Addresses 5 Language 6 Job Details 7 Documents  I Basic Details Title Mrs Gender Female Forename Rachael Honours Middle Name(s) Surname Abbot Parental Ballot Salutation Mrs Abbot Addressee Mrs R Abbot  Relationship Details Student Ben Abbot Contact Type Mother Correspondence Parental Responsibility Priority Pupil Report Court Order Contact Priority Source InTouch Communication  Telephones and Email Addresses Telephones VFax Numbers: New Telephone Mobile 07842550203
1 Basic Details       2 Relationship Details       3 Telephones and Email Addresses       4 Addresses       5 Language       6 Job Details       7 Documents         1 Basic Details       Ite       Mrs       Gender       Female       Image: Contact Parental Ballot       Image: Contact Type       Mother       Image: Contact Type
1 Basic Details       Mrs       Gender       Female       Image: Contact Type         Forename       Abbot       Parental Ballot       Image: Contact Type       Mother       Image: Contact Type       Image: Contact Type       Mother       Image: Contact Type       Image: Contac
1 Basic Details       Mrs       Gender       Female       Image: Contract of the second
Forename       Rachael       Honours         Middle Name(s)
Middle Name(s)
Sumane       Abbot       Parental Ballot       Image: Constant of the second
Salutation       Mrs Abbot       Image: Contract Type       Mrs R Abbot         2 Relationship Details       Student       Ben Abbot       Contact Type       Mother         Correspondence       Parental Responsibility       Priority       1       Image: Contact Type         Pupil Report       Court Order       Contact Priority Source       ✓         InTouch Communication       Image: Contact Type       Main       Primary         Numbers:       Device       Location       Number       Main       Primary       Notes         Telephones VFax       Device       Location       Number       Main       Primary       Notes       Den         Telephone       Home       456 10910       Yes       Telephone       Mobile       0764 255 3029       Den       Den
2 Relationship Details         Student       Ben Abbot         Correspondence       Parental Responsibility         Pupil Report       Court Order         InTouch Communication       Contact Priority Source         3 Telephones and Email Addresses         Telephones VFax       Device         Numbers:       Device         Location       Number         Main       Primary         Numbers:       Work
2 Relationship Details         Student       Ben Abbot       Contact Type       Mother         Correspondence       Parental Responsibility       Image: Priority       Image: Priority         Pupil Report       Court Order       Contact Priority Source       Image: Priority Source         InTouch Communication       Image: Priority Source       Image: Priority Source       Image: Priority Source         3 Telephones and Email Addresses       Device       Location       Number       Main       Primary       Notes         Telephones VFax       Device       Location       Number       Main       Primary       Notes         Telephone       Home       456 10910       Yes       Image: Primary       Notes       Image: Primary         View       View       View       View       View       View       View       Image: Primary
Student       Ben Abbot       Contact Type       Mother         Correspondence       Parental Responsibility       Priority       1         Pupil Report       Court Order       Contact Priority Source       Image: Contact Priority Source         InTouch Communication       InTouch Communication       Image: Contact Priority Source       Image: Contact Priority Source         3 Telephones and Email Addresses       Device       Location       Number       Main         Yumbers:       Device       Location       Number       Main       Primary       Notes         Verdent Mobile       07842553029       Open       Image: Contact Priority Primary       Notes       Image: Contact Primary       Notes
Correspondence       Parental Responsibility       Priority       1         Pupil Report       Court Order       Contact Priority Source       Image: Contact Priority Source         InTouch Communication       Image: Contact Priority Source       Image: Contact Priority Source       Image: Contact Priority Source         3 Telephones and Ernail Addresses       Device       Location       Number       Nain       Primary       Notes         Telephones \Fax       Device       Location       Number       Main       Primary       Notes       Image: Contact Primary         Verdent Contact Primary       New       Telephone       456 10910       Yes       Image: Contact Primary       New         Verdent Contact Primary       New       Verdent Contact Primary       New       Image: Contact Primary       New         Telephone       Home       456 10910       Yes       Image: Contact Primary       New         Telephone       Work       Mobile       07842553029       Image: Contact Primary       New
Pupil Report     Court Order     Contact Priority Source       InTouch Communication     InTouch Communication       3 Telephones and Email Addresses       Telephones\Fax Numbers:     Device       Location     Number       Main     Primary       New       Telephone     Home       456 10910     Yes       Telephone     World       Violat     Violat       Violat     Violat
InTouch Communication          3 Telephones and Email Addresses         Telephones VFax         Numbers:         Device       Location         Numbers:         Device         Used         Office         Used         Used         Device         Used         Device
InTouch Communication
3 Telephones and Email Addresses       Telephones\Fax       Device     Location       Numbers:         Device     Location       Numbers:         Device         Device        Device
3 Telephones and Email Addresses         Telephones\Fax         Numbers:         Device       Location         Numbers:         Telephone         Home         456 10910         Yes         Telephone         Mobile       07842553029         Telephone       Mobile         Viold       456 10910
Telephones\Fax Numbers:         Device         Location         Number         Main         Primary         Notes         New           Telephone         Home         456 10910         Yes         Control of the phone
Numbers: Telephone Home 45610910 Yes Telephone Mobile 07842553029
Telephone Work AEC 10010
Telephone Work 405 10310 X Delete
rax Huille 43610310
Cat Binsmi of Cat Main
Email Addresses"
parentB@intouch.capita.co.uk Home Yes Yes
Selete
Send
🖂 Set Primary 🛷 Set Main
OK Cancel

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.

sims Edit Telephone\Fax	
Telephone details	
Device	Telephone
Location	Mobile 🗸
Number	07842553029
Main	Yes 💌
Primary	No 💌
Notes	
	OK Cancel

- 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.

3 Telephones and Email Addres	ises							
Telephones\Fax	Device	Location	Number	Main	Primary	Notes		New 📄
Numbers:	Telephone	Mobile	07563762201	Yes	Yes			🔁 Open
	Telephone	Home	015785564564					
								💢 Delete
	ļ							
					Set Primary	2	Set Main	
Enal Addresses	Address		Levelier	L Martin	L Dánam I	hlata -		
Email Addresses.	Address	1	Location	Main	Frimary	Notes		New New
	parenta@into	ouch.capita.co.i	uk Home	Yes				🔁 Open
								👾 Delete
								A 00000
								Send
	1							
					Set Primary	1	Set Main	

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.

sws Edit Email	
Location	Home 🔽
Address	parenta@intouch.capita.co.uk
Main	Yes 🗸
Primary	No 🗸
Notes	
	OK Cancel

- 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.

3 Telephones and Email Addres Telephones\Fax Numbers:	Device Telephone Telephone Telephone Fax	Location Home Mobile Work Home	Number 456 10910 07842553029 456 10910 456 10910	Main Yes	Yes	Notes		<mark> </mark> New <mark>C⊐</mark> Open <b>X Delete</b>
Email Addresses:	Address parentB@int	ouch.capita.co.uł	Location Home	Main Yes	Set Primary Primary Yes	Notes	Set Main	È New C⊐ Open X Delete Send
	L				Set Primary	<ul> <li>✓</li> </ul>	Set Main	

- 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.

1	★ Find Students ★ Search ▼ Browse											
	Surname			V	Foren	ame	Dee Cours	chave.		Union	chara.	
	Lier	<any></any>	<b>*</b>	Year Group	<any></any>	<b>*</b>	Reg. Group	<any></any>	<b>*</b>	House	<any></any>	<b>*</b>

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.

mary Contact Details for Contacts of Students: 5,039 matches											
Save 🛛 🟐 Undo  📥 Print								😮 Help 🚰 Unpin 🖇	💢 Clos		
Filter											
Student Contacts											
碞 Student E Contact 🐁	Action										
Student Name	Reg. Group	Contact Name	Relationship	Priority	In	nTouch Communication	Telephone Number	Email Address	^		
Abend, Johnie	8HYB	Escobedo, Shahira	Other Contact	3	✓ N	lo	01429228229	<none></none>			
Abend, Johnie	8HYR	Laudat, Mrs Ibtisam	Mother	1	Yi	'es	07818492420	parentb@intouch.capita.co			
Abend, Johnie	8HYR	Llyod, Mr Murali	Father	2	Y	'es	02626794286	<none></none>			
Abend, Johnie	8HYB	Munford, Mr Piers	Other Contact	3	N	lo	01563644230	<none></none>			
Aberle, Marcela	KGT	Kahuhu, Mr Adamo	Father	1	Y	'es	<none></none>	orkuoo65@hotheaded.com	-		
Aberle, Marcela	KGT	Rediske, Mrs Tsholofelo	Mother	1	Yi	'es	<none></none>	<none></none>			
Abide, Gamett	2HX	Cavezon, Ms Maureen	Mother	1	Y	'es	<none></none>	xgag55@thoracic.biz	-		
Abide, Gamett	2HX	Whelchel, Ms Azalea	Other Relative	2	N	lo	<none></none>	<none></none>			
Acedo, Kaye	9HYY	Belliston, Mrs Natalie	Other Contact	3	N	lo	<none></none>	<none></none>			

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.

- 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.

🐝 FindApplican M Search → 🗔	★ Find Applicants M Search ▼ Browse										
Surname		Forename		Tier	<any></any>	♥					
Application Status	<current></current>	🖌 🛄 Admission Group	<any></any>	🗙 🛄 Intake Group	<any></any>	✓ …					

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.

Primary Contact Details for Contac	ts of Applicants: 46	matches									
😬 Save   🗐 Undo 🚍 Print 😔 Help 🚰 Unpin 💥 Close											
Filter											
Application Status: <current></current>											
Applicant Contacts											
🐏 Applicant 🕐 Contact 🐃 Acti	on										
Applicant Name	Application Status	Contact Name	Relationship	Priority	InTouch Communication	Telephone Number	Email Address	^			
Busskohl, Suhail	Accepted	Scarrow, Miss Faustina	Mother	1 🗸	No	<none></none>	vqx_aw@woofing.com	=			
Consolo, Brenton	Offered	Buesgens, Mr Fred	Father	2	Yes	02549969425	<none></none>				
Consolo, Brenton	Offered	Huffstickler, Miss Ardith	Mother	1	Yes	<none></none>	<none></none>				
Dana, Suzanne	Accepted	Propheter, Mr Hernan	Other Contact	2	No	01684455644	<none></none>				
Dana, Suzanne	Accepted	Scarrow, Miss Faustina	Mother	1	Yes	<none></none>	vqx_aw@woofing.com				
Diewold, Ayana	Accepted	Balfour, Mr Devdan	Father	2	Yes	01873870837	lvpv@gratifyingly.com				
Diewold, Ayana	Accepted	Goettle, Mrs Lewella	Other Contact	4	No	01972508359	<none></none>				
Diewold, Ayana	Accepted	Kaniewski, Mrs Elly	Mother	1	Yes	02841364136	zume@banshee.com				
Diewold, Ayana	Accepted	Wisterman, Mr Doran	Other Contact	3	No	01252236948	njiz@unstopped.org	~			
<								>			

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.
- 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.

🦘 FindStu ∰ Search 🝷	★ Find Students ★ Search ▼ Browse											
Sumame				Foren	ame							
Tier	<any></any>	<b>▼</b>	Year Group	<any></any>	<b>*</b>	Reg. Group	<any></any>	¥	House	<any></any>	✓ …	

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

Primary Contact Details fo	or Students: 5 matches				
💾 Save 🛛 🔄 Undo 📥 Pri	int			😢 Help 🛃 U	npin 💥 Clos
T iber					
Surname: abbot					
Students					
Etudent 💁 Action					
Z student GAddon					
Student Name	Reg. Group	Telephone Number	Email Address		
Abbot, Ben	N	07654 321123 🗸 🗸	parentB@intouch.capita.co		
Abbot, Claire	9A	<none></none>	parenta@intouch.capita.co		
Abbot, Clarissa	11A	<none></none>	parenta@intouch.capita.co		
Abbot, James	10C	<none></none>	parenta@intouch.capita.co		
Abbot, Susan	8B	077584123698	parentb@intouch.capita.co		
<					>

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.

02 | Updating Primary Contact Details

# **O3**/Setting up Message Templates

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## 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 <u>all</u> 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.

Template Manager							2 🛃 🕄
Assessment Individual Assessment Report Message Missing Marksheets Alert Message	New	Сору	Edit	Save	Default	Delete	Activate
Attendance Attendance Letter Message Exceptional Circumstance Message Late Notification Message Percentage Attendance Message Unexplained Absence Message							
Conduct Achievement Award Message Behaviour Incident Alert Message Behaviour Incident Message Behaviour Message Detention Message	Message	Total Template Siz	e: 0 Bytes of 4MB	Maximum templa	ate size is 4MB.	B I U	
Exclusion Message Cover Cover Slip Message Dinner Money Dinner Money Letter Message Disclaimers Email Disclaimer							
Exams Exam Reminder Message Exam Results Message							

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.
- 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.

Template Manager	🔊 🖉 🧐
Dinner Money Letter Message     Disclaimers     Email Disclaimer	Image: Copy         Image: Copy
Exams Exam Reminder Message Exam Results Message Pupil Exam Timetable Message Fees and Bill Payer Bill Payer Message	Pupil General Message (Default) (System)
Profiles Not Approved Pupil Profile Message Pupil Profile Message Pupil Applicant General Message	Subject Total Template Size: 0 Bytes of 4MB. Maximum template size is 4MB. Message Arial The system of 4MB. Maximum template size is 4MB. Message Total Template Size: 0 Bytes of 4MB. Maximum template size is 4MB. Message Total Template Size: 0 Bytes of 4MB. Maximum template size is 4MB.
Pupil General Message School General Message	
School Event Message Staff Training Day Message	
SEN Message SEN Reminder Message	
Timetables Pupil Timetable Message Staff Timetable Message	

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

Pupil General Message (Default) (System)	
New Template	

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**.

	Pupil General Message (Default) (System)     Pupil General Message - Alternative	
₩ <u></u>		▼

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.

Template Manager							2 🖋 🤅
Dinner Money Letter Message Disclaimers Email Disclaimer	New	Сору	Edit	Save	Default	Delete	Activate
Exams Exam Reminder Message Exam Results Message Pupil Exam Timetable Message Fees and Bill Payer Bill Payer Message		Pupil General Me Pupil General Me	issage (Default) (Sj isssage - Atlemative	ystem)			
Profiles Not Approved Pupil Profile Message Pupil Profile Message Pupil Applicant General Message Pupil General Message	Subject T Message	Arial	e: O Bytes of 4MB.	Maximum templa V 12	ate size is 4MB.	B I U	
School General Message School Event Message Staff Training Day Message SEN SEN Message SEN Reminder Message							
Timetables Pupil Timetable Message Staff Timetable Message							

- 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.

Pupil General Message (Default) (System)     Pupil General Message - Alternative     Copy of Pupil General Message - Alternative	

- 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**.

Pupil General Message (Default) (System)     Pupil General Message - Alternative     Pupil General Message - Full	

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.

#### 03 | Setting up Message Templates

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.

Template Manager	🔊 🖉 🖗
Dinner Money Letter Message Disclaimers Email Disclaimer	New Copy Edit Save Defaut Delete Activate
Exams Exam Reminder Message Exam Results Message Pupil Exam Timetable Message Fees and Bill Payer Bill Payer Message	Pupil General Message (Default) (System)     Pupil General Message - Atlernative
Profiles Not Approved Pupil Profile Message Pupil Profile Message Pupil Applicant General Message Pupil General Message	Subject Total Template Size: 0 Bytes of 4MB. Maximum template size is 4MB. Message Arial T U E E
School General Message School Event Message Staff Training Day Message	
SEN SEN Message SEN Reminder Message	
Timetables Pupil Timetable Message Staff Timetable Message	

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.

Arial

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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.



*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.

Unexplained Absence (Default) (System)     Unexplained Absence - Full

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 <u>cannot</u> 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.

	Unexplained Absence (Default) (System)     Unexplained Absence - Full	
		▼

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.

Unexplained Absence (Default) (System)     Unexplained Absence - Full		
ſ	<b>A V</b>	J

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
# **O4** Configuring Message Type Defaults

Introduction	29
Setting Up Message Type Defaults	29

## 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.

ໜ Find Message Type Default				
👬 Search 💋 Open 🚔 Print 🛛 🐺 Brow	se 😽 Next 👚 Prev	vious		
Message Type	Send as	<any> 👻</any>	Receive as <any> 👻</any>	
Message Type	Send as	Receive as	Auto Forward	
Achievement Alert Message	User	School		
Achievement Award	School	User		
Applicant General Message	School	User	Yes	
Attendance Letter Message	School	School		
Behaviour Incident Alert Message	School	School		
Behaviour Incident or Points	School	School		
Behaviour Message	User	User		
Bill Payer Message	User	School	Yes	
Cover Slip Message	User	School	Yes	
<u> </u>				

- 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.

2 Default InTouch Contacts		
	Highest Priority	-
	Highest Priority	
	All Parental Responsibility	
	All InTouch Communicatees	

- 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.

3 Auto Forward	
Use Auto Forward	
Forwarding Email Address	

- 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.

04 | Configuring Message Type Defaults

14. Click the Save button.

04 | Configuring Message Type Defaults

# 05/Sending Pupil/Student Messages

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Sending a Pupil/Student Message	52
Sending an Emergency Alert	70

# 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.

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.

Accessible Via
Focus   Admission   Application Focus   Pupil (or Student)   Special Educational Needs Focus   Pupil (or Student)   Pupil
(or Student) Details   Fees Details
Focus   Pupil (or Student)   Send Pupil (or Student) Message and Focus   Pupil (or Student)   Pupil (or Student) Details (Links panel)
Focus   InTouch   Send Message
Focus   Pupil (or Student)   Special Educational Needs
On the SIMS Home Page, click a SEN reminder in the My Reminders panel.
Focus   Attendance (or Lesson Monitor)   Take Register
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.

💖 Find Student								
📄 New 🎁 Search 🝷 🗁 Open	📥 Print 🛛  😽 Bro	'rint 🛛 🐺 Browse 🕹 Next 🍲 Previous 🗍 🔟 View 👻						🗙 Close
Surname	Forename		Admission Number			Status	Current	~
Tier <any></any>	<ul> <li>Year Group</li> </ul>	<any></any>	✓ Reg	) Group	<any> 🗸</any>	House	<any></any>	~
Name	Year Group	Reg. Group	House	Gender	Admission Number			^
Abbot, Ben	13	N	Hooke	Male	002912			
Abbot, Claire	9	9A		Female	003460			
Abbot, Clarissa	11	11A		Female	003100			
Abbot, James	10	10C		Male	003270			
Abbot, Susan	8	8B		Female	003600			
Abdelkoder, Mohamed	12	G	Flemming	Male	002915			
Able, Benjamin	11	11A	-	Male	003101			
Ablett, Michael	(13)	(G)	Curie	Male	002558			~

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

1 Basic Details				🛆 두 Links 🛛 📎
Legal Forename	Benjamin	Photograph		Linked Documents
Middle Name(s)	Michael			Data Collection Sheet
Legal Surname	Abbot			Send Message
Preferred Surname	Abbot		States	History
Preferred Forename	Ben			Reports
Date of birth	12/07/1993			Exclusions
Age	17 years, 10 months			Behaviour Management Concessions
Gender	Male 🗸			Timetable
Title	~	Birth Certificate Seen	History	Attendance 🗸
				🕐 Help 🔿
<u> </u>				
2 Pagistration				✓

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

s	earc	h Browser									💿 🛃 🤅	3
	Pupil	:	Category:									
	Abbo	ot, Ben	Linked Adults	•				Search	•.•	ок	Cancel	
		All Results	0 🔛 0									
		Linked Adults 🛛 🔻 🗸										
		Name	Role	Pupil Name	$\bowtie$							
		Abbot, Ben	Student	Ben Abbot	1							
		Andrews, Mrs Selina	Teacher: PSE	Ben Abbot		-						
		Blacker, Mr Adrian	Tier Manager	Ben Abbot		-						
		Burton, Miss Fiona	Head of Year	Ben Abbot		1						
		Estaphan, Ms Julia	Teacher: Science	Ben Abbot		-						
		Foster, Miss Jill	Registration Tutor	Ben Abbot		-						
		Green, Miss Helen	Teacher: Religious Ed	Ben Abbot		1						
		Jacobs, Mr Kevin	Head of House, Teacher: History	Ben Abbot		1						
		Kinross, Mr Brian	Teacher: Physical Ed	Ben Abbot		1						
		Konchalski, Mr Milan	Teacher: French	Ben Abbot		1						
		Lubbock, Mr Mark	Teacher: English	Ben Abbot		1						
		Mcnamara, Dr Roger	Teacher: German	Ben Abbot		1						
		Mumford, Mrs Delia	Teacher: Mathematics	Ben Abbot		1						
		Pearson, Mrs Belinda	Teacher: German	Ben Abbot		1						
		Pinkney, Mr Alistair	Teacher: Geography	Ben Abbot		1						
		Tufnell, Mr Roger	Teacher: Technology	Ben Abbot		1						
		Williams, Mr Richard	Teacher: Drama	Ben Abbot		1					T	

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.



7+

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.

Search <b>y</b> 📥 Print					
		_			
Surname		Forename			
ïer <any> ▼ .</any>	Year Group	Year 3 👻	Class <	Any> 🔻 House	e <any> 👻</any>
lame	Year Group	Class	House Gender	Admission Number	
braham, Jane	3	3CB	Female	001041	
dams, Adam		3TO	Male	001122	
nderson, Neo		3CB	Male	001042	
lains, Kirk		3CB	Male	001123	
ellic, Nico		3CB	Male	001043	
ellic, Roman		3CB	Male	001044	
adilia, Celia	3	3CB	Female	001045	
arlsen, Neville	3	3CB	Male	001046	
harles, Harry	3	3TO	Male	001124	
anny, Abbey	3	3CB	Female	001125	
laskalos Carl	3	3CB	Male	001047	

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

Iter:	C	ategory:						0	6
LL,	•	Linked Adults	▼			Search	۰. ۲	ок 🗐	Cancel
	All Results	0 🖂	0 🖬 0						
	Linked Adults 🛛 🔻 🗸								
	Name	Role	Pupil Name	$\bowtie$	SIMS 📊				
	Abraham, Jane	Pupil	Jane Abraham	1					
	Abraham, Mr Allan	Father	Jane Abraham	1					
	Abraham, Mrs Kathy	Mother	Jane Abraham	1					
	Adam, Mr Harry	Father	Adam Adams	1					
	Adams, Adam	Pupil	Adam Adams	1					
	Anderson, Neo	Pupil	Neo Anderson	1					
	Bains, Kirk	Pupil	Kirk Bains	1					
	Belic, Ms Maria	Mother	Nico Bellic	1					
	Belic, Ms Maria	Mother	Roman Bellic	1					
	Bellic, Nico	Pupil	Nico Bellic	1					
	Bellic, Roman	Pupil	Roman Bellic	1					
	Brown, Mrs Charmaine	Registration Tutor	Jane Abraham						
	Brown, Mrs Charmaine	Registration Tutor	Nico Bellic						
	Brown, Mrs Charmaine	Registration Tutor	Roman Bellic						
	Brown, Mrs Charmaine	Registration Tutor	Neo Anderson						
	Brown, Mrs Charmaine	Registration Tutor	Kirk Bains		$\checkmark$				
	Orton Ms Tanva	Registration Tutor	Adam Adame						

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.



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.

Applicant:	(	Category:					SIMS			6
Dana, Suzai	ine	Linked Ad	ults	▼	Search	0 - Selected	0 - Selected	0 - Selected	ок 📕	Cancel
All Res	ults									
All Res	ults dults 🍸 🗸									
All Res	ults dults 🍸 🕶 e	Role	Applicant Name		â 🖬					۲
All Res	ults dults 🍸 🕶 e 1a, Suzanne arrow, Miss Faustina	Role Applicant Mother	Applicant Name Suzanne Dana Suzanne Dana	× 2	1 🖬					۲

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.



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 <u>not</u> 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.

rind SEN Student						
👬 Search 🔹 🗁 Open 🚔 Print 🛛 🌆 Browse 🐥 Next	Previous	🔟 View 🔹			碞 Links 👻	😨 Help 💥 Close
Sumame For	ename			]	Status Current	*
Tier <any> 🔽 Ye</any>	ar Group <any></any>	¥	Reg Group	<any> 🗸</any>	House <any></any>	<b>→</b>
SEN Status <any sen=""></any>						
Name	Year Group	Reg. Group	House	Gender	SEN Status	<u>^</u>
Ackroyd, Marc	9	9B		Male	A - School/Early Years A	veti
Adam, Briony	12	J	Hooke	Female	A - School/Early Years A	voti
Aitken, Nigel	10	10E		Male	A - School/Early Years A	icti
Anderson, Dylan	11	11D	Curie	Male	P - School/Early Years A	voti
Anderson, Jacob	8	8E	Flemming	Male	P - School/Early Years A	icti
Anderson, Loren	9	9E		Female	A - School/Early Years A	voti
Antas, Sergei	10	10B		Male	A - School/Early Years A	icti
Archer, Glenda	8	8C		Female	P - School/Early Years A	voti 🔽

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

)verview				*	된 Links
Date 03/09/2018 27/03/2018 28/11/2017 07/09/2017 12/07/2017 28/03/2017 29/11/2016 29/11/2016	Type Review Review Review Review Review SEN Status Review Provision	Summary Type: Annual: Status: Planned Type: Temly; Status: Meeting Completed Type: Temly; Status: Meeting Completed Type: Temly; Status: Meeting Completed Type: Annual; Status: Meeting Completed Changed to: K - SEN Support Type: Initai; Status: Meeting Completed Changed to: K - SEN Support Type: Initai; Status: Meeting Completed Type: Non Teaching Assistant (General)	Pew Copen ☆ Delete	E	Linked Documents Quick letter Data Collection Sheet Send Message Student Teacher View Pupil Details History Reports Exclusions Behaviour Manageme Timetable Classes
inked Adults /	<b>Agencies</b> un Colman, Fathe er Jovner, Registr	er ration Tutor	New		Attendance Dinner Money Financ Assessment Communication Log Pupil Curriculum Intervention Report

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

Sea	rch Browser				2 🖉 🕄
Pu	pil:	Category:			
A	obot, Ben	Linked Adults		Search	OK Cancel
	All Results	0 🔛 0 🖬 0			
	] Linked Adults 🍸 🗸				
	Name	Role	Pupil Name 🖂 🔀 📊		
	Abbot, Ben	Student	Ben Abbot 🔽 📃		
[	Andrews, Mrs Selina	Teacher: PSE	Ben Abbot 📃 🔽		
[	Blacker, Mr Adrian	Tier Manager	Ben Abbot 📃 🔽		
	Burton, Miss Fiona	Head of Year	Ben Abbot 📃 🔽		
[	Estaphan, Ms Julia	Teacher: Science	Ben Abbot 📃 🔽		
1	Foster, Miss Jill	Registration Tutor	Ben Abbot 📃 🔽		
1	Green, Miss Helen	Teacher: Religious Ed	Ben Abbot 📃 🔽		
	Jacobs, Mr Kevin	Head of House, Teacher: History	Ben Abbot 📃 🔽		
	Kinross, Mr Brian	Teacher: Physical Ed	Ben Abbot 📃 🗸		
	Konchalski, Mr Milan	Teacher: French	Ben Abbot 📃 🔽		
	Lubbock, Mr Mark	Teacher: English	Ben Abbot 📃 🔽		
	Mcnamara, Dr Roger	Teacher: German	Ben Abbot 📃 🔽		
	Mumford, Mrs Delia	Teacher: Mathematics	Ben Abbot 📃 👽		
	Pearson, Mrs Belinda	Teacher: German	Ben Abbot 📃 🔽		
	Pinkney, Mr Alistair	Teacher: Geography	Ben Abbot 📃 🔽		
	Tufnell, Mr Roger	Teacher: Technology	Ben Abbot 📃 🔽		
	Williams, Mr Richard	Teacher: Drama	Ben Abbot 🔲 🔽		<b>•</b>

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.



7+

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).



Filter button

## **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.

Read Reminder			
Reminder Details			
Event Name	Forename	Surname	End Date
Meeting 1-1	Nigel	Aitken	18/06/2010
[	Send Messages	Print	Delete Close

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.

💖 Find Behaviour Management S	No Find Behaviour Management Student										
🖬 Search 🝷 🗁 Open 🚍 Print   🛄 Browse 🖶 Next 🏠 Previous   🛄 View 🔹 🖉 Links 🔹 🎱 Help											
Sumame	Forename		Adm	ission Number		Status	Current	~			
Tier <any> 🗸</any>	Year Group	<any></any>	🗸 Reg	Group	<any> 🗸</any>	House	<any></any>	*			
Name	Year Group	Reg. Group	House	Gender	Admission Number			<u>^</u>			
Abbot, Ben	13		Hooke	Male	002912			_			
Abbot, Claire	9	9A		Female	003460						
Abbot, Clarissa	11	11A		Female	003100						
Abbot, James	10	10C		Male	003270						
Abbot, Susan	8	8B		Female	003600						
Abdelkoder, Mohamed	12	G	Flemming	Male	002915						
Able, Benjamin	11	11A	-	Male	003101			100			
Ablett Michael	(10)	(G)	Curio	Mala	002550			~			

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

2 Achievement     Reports       Date     Type       Points     Comments       Award     Award Date       Points     Comments       Points     Comments       Award     Award Date       Points     Comments       Points     Comments       Points     Comments       Points     Comments       Points     Comments       Points     Points       Points     Poi	1 Academic Year     Academic Year       Academic Year     Academic Year 2009/2010       Achievements     0       Points     0       No. 01 Detentions     0       Recorded     0	]	Calculation     Control Control Control     Control Control     Contro     Control     Control     Control     Control
3 Behaviour	Achievement     Date Type Points Comments Award Award Date	New	Reports SEN Exclusions Concessions Timetable
Date Type Fole Folits Comments Action Action Date New	3 Behaviour Date Type Role Points Comments Action Action Date	New	Attendance Assessment Examinations Fees Details Courses

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

S	earch	Browser									?	0
	Pupil:		Category:									
	Abbo	t, Ben	Linked Adults	•				Search	•••	ок 🗐	Cancel	\$
		All Results	0 🔛 0	D								
		Linked Adults 🛛 🍸 🕶										
		Name	Role	Pupil Name	$\bowtie$							
		Abbot, Ben	Student	Ben Abbot								
		Andrews, Mrs Selina	Teacher: PSE	Ben Abbot		-						
		Blacker, Mr Adrian	Tier Manager	Ben Abbot		-						
		Burton, Miss Fiona	Head of Year	Ben Abbot		1						
		Estaphan, Ms Julia	Teacher: Science	Ben Abbot		1						
		Foster, Miss Jill	Registration Tutor	Ben Abbot		1						
		Green, Miss Helen	Teacher: Religious Ed	Ben Abbot		1						
		Jacobs, Mr Kevin	Head of House, Teacher: History	Ben Abbot		1						
		Kinross, Mr Brian	Teacher: Physical Ed	Ben Abbot		1						
		Konchalski, Mr Milan	Teacher: French	Ben Abbot		1						
		Lubbock, Mr Mark	Teacher: English	Ben Abbot		1						
		Mcnamara, Dr Roger	Teacher: German	Ben Abbot		1						
		Mumford, Mrs Delia	Teacher: Mathematics	Ben Abbot		1						
		Pearson, Mrs Belinda	Teacher: German	Ben Abbot		1						
		Pinkney, Mr Alistair	Teacher: Geography	Ben Abbot		1						
		Tufnell, Mr Roger	Teacher: Technology	Ben Abbot		1						
		Williams, Mr Richard	Teacher: Drama	Ben Abbot		1						▼

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.



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).

1

#### 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.

💖 Find Exclusions Student 👘								
👬 Search 🔻 📂 Open 📥 Print	🐻 Browse 🕹 N	lext 合 Previous	🔟 View	•		된 Link	s 🔻 😨 Help	💥 Close
Surname Tier <any> •</any>	Forename Year Group	<any></any>	Adm	ission Number Group	<any></any>	Status House	Current <any></any>	*
Name	Year Group	Reg. Group	House	Gender	Admission Number			^
Abbot, Ben	13	N	Hooke	Male	002912			_
Abbot, Claire	9	9A		Female	003460			
Abbot, Clarissa	11	11A		Female	003100			
Abbot, James	10	10C		Male	003270			
Abbot, Susan	8	8B		Female	003600			
Abdelkoder, Mohamed	12	G	Flemming	Male	002915			
Able, Benjamin	11	11A		Male	003101			
Ablett, Michael	(13)	(G)	Curie	Male	002558			
Abu-Koash, Frederik	11	11C		Male	003102			
Ackroyd, Marc	10	10B		Male .	003271			-

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

Exclusions				🚽 Links 🛛 😵
Academic Year	Term	Start Date End Date Length Exclusion Type Exclusion Reason	New	Linked Documents
				Quick letter
				Data Collection Sheet
			💥 Delete	Send Message
				Student Teacher View
				Student Details
				History
				Reports
				SEN
				Behaviour Management
				Concessions
				Timetable
				Classes
				Attendance
				Assessment
				Examinations
				Fees Details
				Courses
				Communication Log
				Student Curriculum

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

Se	arch l	Browser			_	_					📀 🚀 🕄
ſ	Pupil:		Category:								
	Abbot, I	Ben	Linked Adults	-				Search	• . •	OK	Cancel
								ocuron -			cuncer o
	🗖 Al	I Results									
	📄 Lir	nked Adults 🛛 🔻 🗸									
		Name	Role	Pupil Name	$\bowtie$						
		Abbot, Ben	Student	Ben Abbot							
		Andrews, Mrs Selina	Teacher: PSE	Ben Abbot		1					
		Blacker, Mr Adrian	Tier Manager	Ben Abbot		1					
		Burton, Miss Fiona	Head of Year	Ben Abbot		1					
		Estaphan, Ms Julia	Teacher: Science	Ben Abbot		-					
		Foster, Miss Jill	Registration Tutor	Ben Abbot		-					
		Green, Miss Helen	Teacher: Religious Ed	Ben Abbot		1					
		Jacobs, Mr Kevin	Head of House, Teacher: History	Ben Abbot		1					
		Kinross, Mr Brian	Teacher: Physical Ed	Ben Abbot		1					
		Konchalski, Mr Milan	Teacher: French	Ben Abbot		1					
		Lubbock, Mr Mark	Teacher: English	Ben Abbot		1					
		Mcnamara, Dr Roger	Teacher: German	Ben Abbot		1					
		Mumford, Mrs Delia	Teacher: Mathematics	Ben Abbot		1					
		Pearson, Mrs Belinda	Teacher: German	Ben Abbot		1					
		Pinkney, Mr Alistair	Teacher: Geography	Ben Abbot		1					
		Tufnell, Mr Roger	Teacher: Technology	Ben Abbot		1					
		Williams, Mr Richard	Teacher: Drama	Ben Abbot		1					•

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.



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.

Se	arch	Browser									2 🖋 🤅
F	upil:		Category:								
	Abbot,	Ben	Linked Adults					Search	· · ·	ок 📃	Cancel
		l Results									
[	Lir	nked Adults 🛛 🔻 🗸									
		Name	Role	Pupil Name	$\bowtie$						
		Abbot, Ben	Student	Ben Abbot							
		Andrews, Mrs Selina	Teacher: PSE	Ben Abbot		1					
		Blacker, Mr Adrian	Tier Manager	Ben Abbot		1					
		Burton, Miss Fiona	Head of Year	Ben Abbot		1					
		Estaphan, Ms Julia	Teacher: Science	Ben Abbot		1					
		Foster, Miss Jill	Registration Tutor	Ben Abbot		1					
		Green, Miss Helen	Teacher: Religious Ed	Ben Abbot		1					
		Jacobs, Mr Kevin	Head of House, Teacher: History	Ben Abbot		1					
		Kinross, Mr Brian	Teacher: Physical Ed	Ben Abbot		1					
		Konchalski, Mr Milan	Teacher: French	Ben Abbot		1					
		Lubbock, Mr Mark	Teacher: English	Ben Abbot		1					
		Mcnamara, Dr Roger	Teacher: German	Ben Abbot		1					
		Mumford, Mrs Delia	Teacher: Mathematics	Ben Abbot		1					
		Pearson, Mrs Belinda	Teacher: German	Ben Abbot		1					
		Pinkney, Mr Alistair	Teacher: Geography	Ben Abbot		1					
		Tufnell, Mr Roger	Teacher: Technology	Ben Abbot		1					
		Williams, Mr Richard	Teacher: Drama	Ben Abbot		1					T

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

#### 05 | Sending Pupil/Student Messages

(Select All)
Father
Head of Year
Mother
Registration Tutor
Student
Teacher

 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.

🐝 Find Student È New ∰ Search ▾ 🖆 Open 🚍	Print   🐺 Brov	<mark>vse</mark> 😽 Next 🔒	Previous	🛙 View 🔹		🗲 Link	ks 🔻 😨 Help	💥 Close
Surname	Forename		Admi	ission Number		Status	Current	~
Tier <any> 🗸</any>	Year Group	<any></any>	✓ Reg	Group	<any> 💌</any>	House	<any></any>	*
Name	Year Group	Reg. Group	House	Gender	Admission Number			^
Abbot, Ben	13	N	Hooke	Male	002912			
Abbot, Claire	9	9A		Female	003460			
Abbot, Clarissa	11	11A		Female	003100			
Abbot, James	10	10C		Male	003270			
Abbot, Susan	8	8B		Female	003600			
Abdelkoder, Mohamed	12	G	Flemming	Male	002915			
Able, Benjamin	11	11A	-	Male	003101			
Ablett, Michael	(13)	(G)	Curie	Male	002558			~

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

1 Basic Details				^	🖻 Links 🛛 📎
Legal Forename	Benjamin	Photograph			Linked Documents
Middle Name(s)	Michael				Data Collection Sheet
Legal Surname	Abbot				Send Message
Preferred Surname	Abbot		ALCON .		History
Preferred Forename	Ben				Reports SEN
Date of birth	12/07/1993				Exclusions
Age	17 years, 10 months				Behaviour Management Concessions
Gender	Male 🗸				Timetable
Title	<b>~</b>	Birth Certificate Seen	History		Attendance 🗸
🛶 Quick Note					🕐 Help 🛛 🛞

- 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.

Searc	h Browser									- ? 🖋 🤅
Pupi	l:	Category:							0	
Abb	ot, Ben	Linked Adults	-				Search	<b>1</b> •••	ок	Cancel
	All Results	0 🔛 0								
	Linked Adults 🛛 🔻 🗸									
	Name	Role	Pupil Name	$\bowtie$						
	Abbot, Ben	Student	Ben Abbot	1						
	Andrews, Mrs Selina	Teacher: PSE	Ben Abbot		1					
	Blacker, Mr Adrian	Tier Manager	Ben Abbot		1					
	Burton, Miss Fiona	Head of Year	Ben Abbot		1					
	Estaphan, Ms Julia	Teacher: Science	Ben Abbot		1					
	Foster, Miss Jill	Registration Tutor	Ben Abbot		1					
	Green, Miss Helen	Teacher: Religious Ed	Ben Abbot		1					
	Jacobs, Mr Kevin	Head of House, Teacher: History	Ben Abbot		1					
	Kinross, Mr Brian	Teacher: Physical Ed	Ben Abbot		1					
	Konchalski, Mr Milan	Teacher: French	Ben Abbot		1					
	Lubbock, Mr Mark	Teacher: English	Ben Abbot		1					
	Mcnamara, Dr Roger	Teacher: German	Ben Abbot		1					
	Mumford, Mrs Delia	Teacher: Mathematics	Ben Abbot		1					
	Pearson, Mrs Belinda	Teacher: German	Ben Abbot		1					
	Pinkney, Mr Alistair	Teacher: Geography	Ben Abbot		1					
	Tufnell, Mr Roger	Teacher: Technology	Ben Abbot		1					
	Williams, Mr Richard	Teacher: Drama	Ben Abbot		1					

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

#### 05/ Sending Pupil/Student Messages

(Select All)
Father
Head of Year
Mother
Registration Tutor
Student
Teacher

 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.

Timeli	ne 17/12/12-21	112/12	_			<b>S</b>	J.
	Mon, 17 Dec 2	Tue, 18	Dec 2	Wed, 19 Dec	Thu, 20 Dec 2	Fri, 21 Dec 2012	*
09 <sup>00-</sup> 30	09:15-10:15 8y/En1E2 FT	09:15-1 8y/Ma2 CJ	IO:15 M1	09:15-10:15 8y/Pe2SH1 JY	09:15-10:15 8y/En1E2 FT	09:15-10:15 8y/Ge2L3 MK	
10 <u>00</u> 30	10:15-11:15 8y/Fr2L3 MK	10:15-1 8y/En1 FT	1:15 E2	10:15-11:15 8F/Sc S4 JF	10:15-11:15 8y/Mu1 MUS GD	10:15-11:15 8y/En1E2 FT	
1100		11:15					
30 12 <sup>00</sup>	11:35-12:35 8y/Te3 T3 GR	-12:0 12:00	11:35- 12:35 8F/Sc	11:35-12:35 8F/Gg H5 AL	11:35-12:35 8F/Re H6 KJ	11:35-12:35 8y/Ma2 M1 CJ	
30	12:35-13:35	12:35-1	3:35	12:35-13:35	12:35-13:35	12:35-13:35	
1300	8y/Te3T3 GR	8F/Sc S JF	4	8y/Ma2M1 CJ	8y/Fr2L3 MK	8F/Hi H1 AS	
30							
1400							
30	14:30-15:30	14:30-1	5:30	14:30-15:30	14:30-15:30	14:30-15:30	
1500	8y/Ma2 M1	8y/Te3	Т3	8y/Mu1 MUS	8F/Ps S1	8y/Pe2 SH1	
30							w

- 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.

SIMS Notification	×
The following recipients do not have contact details recorded for the chosen communication method:	1
Zelinskova, Mrs Ann	
Ok	

#### 05 | Sending Pupil/Student Messages

 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.

Send SEN R	teminder 💿 🖉 🕄
Send	Attach Files
То	Mrs Ann Zelinskova 🔀 :
Subject:	<preferredname>. <yeargroup>. <reggroup></reggroup></yeargroup></preferredname>
Message:	
	<preferredforename> has a <eventname> <eventtype> on <enddate></enddate></eventtype></eventname></preferredforename>

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.

Search Browse	r		2 🛃 🕄
Name:	Category:	Search	OK Cancel
			Ţ

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.

earch Browser		2 🖉
Name:	Category:	Search OK Cancel
All Results	0 🔛 0	
Staff		$\odot$
Students		$\odot$
Agents		$\odot$
InTouch Contacts	s of Students	$\odot$
Other Schools		$\odot$

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

Sea	rch E	Browser				-		🖋 🕄
Na	ame:		Categor	y:				
s			Current			•	Search OK Can	
	] All	l Results		SIMS	•			
	Sta	aff					(	
		Name	Gender	Staff Code				
		Andrews, Mrs Selina Brown, Mr Paul Dumbell, Mr Steven Green, Mr Stephen Masoon, Mrs Sandra Miandad, Dr Sunil Sabatini, Mrs Angelina Simmons, Mr Albert Sinclair, Mr Jeremy Singh, Mrs Kamla Slaters, Miss Susan Smith, Mr Trevor Stephens, Ms Rachel	Female Male Male Female Male Female Male Female Female Female Female Female	SA PB SD SG SMN SM ASI AS JS KS SS TS				
	] Stu	Stevens, Mrs Janice Stockill, Mr Vincent Stranks, Mr Lawrence Williams, Mrs Susan	Female Male Male Female	JLS VS LS SW		V V V	-	•
	1 / 0	ente						<u></u>

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 and 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.

Search Br	owser									2 🖋 🕄
Name:		Category	/:						0	
s		Current			▼		Search	•.•	ок	
	esults	0	SIMS 13		0					
Staff										
N	ame	Gender	Staff Code							
Image: A start of the start	Andrews, Mrs Selina	Female	SA		~					
Image: A start of the start	Brown, Mr Paul	Male	PB		<b>~</b>					
Image: A start of the start	Dumbell, Mr Steven	Male	SD		<b>~</b>					
Image: A start of the start	Green, Mr Stephen	Male	SG		<b>~</b>					
Image: A start of the start	Mason, Mrs Sandra	Female	SMN		<b>~</b>					
	Miandad, Dr Sunil	Male	SM		<b>~</b>					
	Sabatini, Mrs Angelina	Female	ASI							
	Simmons, Mr Albert	Male	AS		$\checkmark$					
	Sinclair, Mr Jeremy	Male	JS		<b>~</b>					
	Singh, Mrs Kamla	Female	KS							
	Slaters, Miss Susan	Female	SS		_					
	Smith, Mr Trevor	Male	15	_	⊻ .	7				
	Stephens, Ms Rachel	Female				1				
	Stevens, Mirs Janice	Female	JLS							
	Stockill, Mr Vincent Stranke, Mr Lawrence	Male	10							U.
	Williams, Mrs Susan	Female	SW		~					
Stude	ents									$\overline{\mathbf{v}}$
	te									

- 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.

Send Gener	ral Message	2 🖉 🕄
Send	Attach Files	
То	Smith, Mr Trevor	
Subject:		
Message:		
	Messag	le



#### 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 <u>not</u> be possible to contact them via SIMS InTouch)
- 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.

Category:
InTouch Contacts of Students > Registration Groups 🔻 💘

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, any 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.

 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.

Sea	rch B	rowser									💿 🛃 🐔
Na	me:		Categor	y: i Contacts c	of Students >	Registra	ition Groups 🔻 🎽	Search	•.•	ок	Cancel
	All	Results		SMS (							
	11A										
	11B										$\overline{\mathbf{v}}$
	11C										$(\mathbf{v})$
	11D										
		InTouch Contacts of	Year Group	Reg Group	House	Gender	Ad No				
	÷	Addison, Millie	11	11D	Curie	Female	003413				
	- 👯	Brown, Jenny	11	11D	Boyle	Female	003417				
	<b>¥</b>	Faloon, Aaron	11	11D	Curie	Male	003315				
	<b>*</b>	Fletcher, Tristan	11	11D	Boyle	Male	003419				
	¥	Honeywell, Freddie	11	11D	Hooke	Male	003324				
	-	Hutchinson, Roger	11	11D	Hooke	Male	003326				
	¥	Kaur, Samreen	11	11D	Curie	Female	003331				
	¥	McKinnon, Ali	11	11D	Newton	Male	003352				
	¥	Peacock, Chris	11	11D	Curie	Male	003373				
	-	Price, David	11	11D	Flemming	Male	003382				
	<b>*</b>	Rainey, Adele	11	11D	Curie	Male	003383				
	<b>¥</b>	Rhodes, Mary	11	11D	Newton	Female	003385				
	<b>¥</b>	Sahota, Katie	11	11D	Flemming	Female	003391				
	¥	Watkins, Shelley	11	11D	Curie	Female	003434				
	11E										

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.

InTouch Contacts of	Year Group	Reg Group	House	Gender	Ad No
Addison, Millie	11	11D	Curie	Female	003413

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.

#### 05 | Sending Pupil/Student Messages

Contact Selection	icon			
Hutchinson, Roger 11	11D	Hooke	Male 003326	
Recipients				
Recipient Name		Riority	Relationship	Parental Responsibility
Hutchence, Mrs Paulette		2	Grandparent	True
E Hutchinson, Miss BARBARA	<b>v</b>	1	Mother	True
	110	Newton	remaie 000000	

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.

Hutchinson, Roger 11	11D	Hooke	Male 003326	
Recipients				
Recipient Name		Priority	Relationship	Parental Responsibility
Hutchence, Mrs Paulette	<b>~</b>	2	Grandparent	True
E Hutchinson, Miss BARBARA	<b>&gt;</b>	1	Mother	True
	טוו	Newton	remale 000000	

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.

Hutchinson, Roger 11	11D	Hooke	Male 003	326
Recipients				
Recipient Name		Riority	Relationship	Parental Responsibility
Hatchett, Mrs L	~		Other Relati	ve False
Hutchence, Mrs Paulette	<b>~</b>	2	Grandparent	t True
Hutchinson, Miss BARBARA	<b>V</b>	1	Mother	True
Trioges, Mary 11	שח	newton	remale uus	300

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.

# **i** !

#### 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.

Subject: IMPORTANT: Parent Consultation Evening

**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.

• 11 • • • B I U = = = = = ? . • \* \*

*TIP:* If you make a mistake when entering text, the standard Microsoft<sup>®</sup> 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

Arial

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

#### 05 | Sending Pupil/Student Messages

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



 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



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.

sims Inse	rt Hyperlink 🛛 🛛 🔀
Text	our website
URL	http://www.duchyschool.org.uk
	V OK 🔀 Cancel

**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<sup>®</sup> **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.

Send Gener	ral Message 🥏	📝 🕄
Send	Attach Files	
To	InTouch Contact(s) of Aperen, Alex	
Subject:	IMPORTANT: Parent Consultation Evening	
Attached:	迥)Preparing for 2011.doc (21.5KB)	
T	Total Message Size: 22KB of 4MB. Maximum message size is 4MB.	
Message:		3 -
	Messag	à

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

#### 05 | Sending Pupil/Student Messages



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.

sims Save	to Stud	lent's Commun	i 🗆 🗆 💌
Publ	ic	Private	Confidential
	Studen	t Name	
	Roge	r Hutchinson	
	Samr	een Kaur	
		( <b>1</b> )-	
		Sav	Cancel

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.

sins Dela	ayed Sending of Messages
Please	specify the date/time to send the message(s).
Date:	19/11/2013 15 Time: 09:30 -
	V OK 🔀 Cancel

- 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.

sins Interna	itional Number Warning 🔲 🗖 🔀
The following and messag	g recipients have an international number es may be charged at a higher rate
Name	Role
00353121	41789
s	Print 🧹 OK 🛛 🗱 Cancel

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 <u>from anywhere in SIMS</u>, 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.

SIMS . ne	t 🛛 🔀
(į)	Emergency alert sent.
(	ок

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.

School Diary		S 😒 🛃	My R	eminders		😒 🖉
Date 02/03/2015 08:30 - 09:00 02/03/2015 09:00 - 09:30 03/03/2015 09:00 - 09:30 03/03/2015 16:00 - 17:00 04/03/2015 16:00 - 16:30 05/03/2015 16:00 - 17:00	Description Full Staff Meeting KS5 Assembly KS3 Weekly Assembly Chess Club Department Meeting Chess Club	Category Meeting Assembly Assembly Extra Curricular Meeting Conference Alert	Read	Sent 20/11/2014 13:35 20/11/2014 13:35 28/10/2014 09:48 28/10/2014 09:48 26/10/2014 29:06	Subject SEN Review Next SEN Review Due SEN Review Next SEN Review Next SEN Review Due	
		Teacher Mrs Anita	Abell nee	Is urgent assistance!		More

05/ Sending Pupil/Student Messages

# **06** Viewing Your Messages

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# 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.

sims Save to St	udent's Comm	unica 🔳 🗖 🔀
Public	Private	<ul> <li>Confidential</li> </ul>
Studer	nt Name Aitken	
	📕 Sa	ve 🛛 🞇 Cancel

- 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.

#### 06 | Viewing Your Messages

SIMS Save to	Student's Comn	nunica 🔳 🗖 🔀
Public	Private	<ul> <li>Confidential</li> </ul>
Stuc	lent Name	
V Ni	gel Aitken	
	<b>e</b> S	ave 🛛 🗱 Cancel

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 <u>only</u> (**Reply**), or to the sender and <u>all</u> other recipients of the original message (**Reply to All**).

NOTES: It is possible to **Reply to All** <u>only</u> 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.

- 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.
- 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.

sims Please Confirm	
Are you sure you want to delete this message?	
	Yes 😫 No

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.

Event Type		-			
Date	14/08/2018				
Comments					*
					-
eople Involve	d				
Name		Roles			New
					💥 Delete
otes/Docume	nis				Delete
otes/Docume Attachment	<b>rits</b> Summary	Туре	Owner	Last Modified On	New
otes/Docume Attachment	<b>nts</b> Summary	Туре	Owner	Last Modified On	New Open
Attachment	<b>nts</b> Summary	Туре	Owner	Last Modified On	New Open Delete

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.

	rovision				2 ×
ovision	Time in SEN Unit				
Start Date	14/08/2018		Fod Date		
Cost	14/00/2010		Lind Date		
Cost					
Frequency					
Comments					<b>^</b>
					-
onle involved					
Name		Boles			New
Hamo		1000			× Delete
otes/Documents	5				
otes/Documents	s Summary	Туре	Owner	Last Modified On	New
otes/Documents	s Summary	Туре	Owner	Last Modified On	New
Attachment	s Summary	Туре	Owner	Last Modified On	Den Xew
otes/Documents	s Summary	Туре	Owner	Last Modified On	New
Attachment	<b>s</b> Summary	Туре	Owner	Last Modified On	Open
Attachment	<b>s</b> Summary	Туре	Owner	Last Modified On	Delete
Attachment S	<b>s</b> Summary	Туре	Owner	Last Modified On	OK Cancel

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.

SIMS Add/Edit SEN Review						×
General Review Type Start Date and Time Venue	Termly         N           20/11/2009         20/11/2009         11:00           Green Abbey School         11:00         11:00		Review Status End Time	Planned 11:30	×	<
SEN Coordinator Name	Mrs Ann Zelinskova					
People Involved Invited / Attended	Name		Role(s)	IA	Delete ✓ Delete ✓ Copy I≫A	
			Invited	d 🗌 Attended (		
Consultations Date for Student			Date for Parent(s)			
Outcome SEN Status Comments	<outcome undecided=""></outcome>	Char	nges to this SEN Status wi	Il affect the Student's S	EN Status	
<	· · · · · · · · · · · · · · · · · · ·				OK Cancel	

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.

Print						🙆 Help	🖉 Unpin 💢 Clo
Pasia Datrik	Emorrow	and Cartanta 1		Kauladiaat			[
	Father	Mr Steven Bagnall		Attendance	Rehaviour	Exclusions	Achievements
Keith Bagnall 17/04/1998				FAC %	Dellaviour		Actileventatio
1770471330	Priority	1 000100		34.0 %	U	U Day(s)	U
52 Gore Lane Spalding	Home No.	01/33 880186		Assessment			
Lincs	Work No.	01733 222000		Current Class	Reg Tutor	Head of Year	Report Card
01733 880186	Mother	Mrs Zoe Bagnall		0v/Pe1	8F	Houder Part	No
Never Assigned	Pictard	nie zee bagnan	Y	oy/rei	Mr A Gray		NO
Quick Must use asthma inhaler twice	a day. Please	see medical notes for		Mr R Davidson	Art Room 1		
C Attendance	Pie Chart	P Behaviour			Achiev	<u>ements</u>	
Description Sessions	%	Date Type		Points	Date	Туре	Points
Present 186 Authorsed Absence 0 Unauthorsed Absence 2 Possible Attendances 264 Approved Educational Ac 0 Late before ren closed 0	70.5 0 = 1 0.8 0 0 0 • •	15/04/2008 Disruptive Be 04/03/2008 Insolence	*havio	our 1 1	18/02/2008	Choir	1
Assessment	5	SEN Needs				5	
Aspect Result Date	Resu	Ranking   Need Type   1	Descr	iption	Description	Supervisor	r I
Ten Te					Class OAK	Miss S. Fort	tune

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.

Message	es (0 U	Inread)								8	- 🕄 😒 🗷
Inbox	0	Owner	From	Subject	Received	Туре	Attachments	Importance	Flag Status		📂 Open
	5005	0	Mrs Emma Stevens		23/07/2015 11:37	General Message			P		W Delete
	585	<b>^</b>	Mrs Emma Stevens	Abjit Abhra, Year R, ELM	22/07/2015 13:22	Behaviour Incident or Points			P	- 1	
	<b>200</b>	0	Miss Belinda Bates	Reminder for finishing the presentation before the	22/07/2015 10:06	General Message					" Reject
	2005	Ő.	Miss Belinda Bates	Martin Chappling, Year 4, 4ES	22/07/2015 10:04	SEN Message					
	<b>200</b>	<u>0</u>	Mrs Gillian Grosvenor	Racist Incident	02/02/2012 17:43	General Message		•	►		
	2005	8	Mrs Gillian Grosvenor	Fighting	31/01/2012 14:15	General Message		4			
	200	8	Mrs Gilian Grosvenor	Fighting	22/09/2011 17:56	General Message		•			
	2	8	Mrs Gillian Grosvenor	Fighting	22/09/2011 17:55	General Message		•	►		
	2005	8	Mrs Gillian Grosvenor	Disruptive Behaviour	10/02/2011 15:07	General Message		•			
	200	8	Mrs Gilian Grosvenor	Disruptive Behaviour	10/02/2011 15:01	General Message		•			
	25	8	Mrs Gillian Grosvenor	Disruptive Behaviour	10/02/2011 15:00	General Message		<b>†</b>			
	2005	8	Mrs Gillian Grosvenor	Disruptive Behaviour	10/02/2011 14:59	General Message		•			
Sent	5145	Owner	To <multiple> <multiple></multiple></multiple>	Subject <preferredname>, <reggroup> <preferredname>, <yeargroup> <reagroup></reagroup></yeargroup></preferredname></reggroup></preferredname>	Sent 23/07/2015 13:00 22/07/2015 13:22	Type Unexplained Absence Mess Behaviour Incident or Points	Attachments	Importance	Flag Status		Copen
			Aaron Mr.J	(Preferred Name), (YearGroup), (RegGroup)	22/07/2015 13:05	Achievement Award		1			
		-	stevens@example.com	Auto-forward: Chloe Jackson, Year 3, 3CB	22/07/2015 13:01	General Message		•			
	100	ă –	<multiple></multiple>	<preferredname>, <yeargroup>, <reggroup></reggroup></yeargroup></preferredname>	22/07/2015 13:01	SEN Message					
	SING	ñ	Mrs Jennifer Boswell	Fw: Martin Chappling, Year 4, 4ES	22/07/2015 11:36	SEN Message					
	1	ñ	<multiple></multiple>	Reminder for finishing the presentation before the 31 of July	22/07/2015 10:05	General Message					
	5385	ñ	<multiple></multiple>	<preferredname>, <yeargroup>, <reggroup></reggroup></yeargroup></preferredname>	22/07/2015 10:03	SEN Message			►		
	SING	ē.	<multiple></multiple>	Pupil out of school	21/07/2015 11:44	General Message			4		
	1	õ.	<multiple></multiple>	Reminder for today's meeting	21/07/2015 11:38	General Message			4		
	2	Ő.	<multiple></multiple>	Chess Award Results	21/07/2015 11:35	General Message			¥		

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.



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 <u>or</u> 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**.



10

More Information:

Restore button

*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.

0.0 .	10 IV						<b>U</b>	- P	onpin 🍂
x 2 Sent	3 Queued Messages								
ox									
Owner	From	Subject	Received	Туре	Attachments	Importance	Flag Status	*	📂 Open
🖁 🙎	Mrs Emma Stevens		23/07/2015 11:37	General Message			P		💥 Delete
	Mrs Emma Stevens	Abjit Abhra, Year R, ELM	22/07/2015 13:22	Behaviour Incid			P		. Reject
💐 <u> 8</u>	Miss Belinda Bates	Reminder for finishing the presentation b	. 22/07/2015 10:06	General Message					() Higool
M 🔝	Miss Belinda Bates	Martin Chappling, Year 4, 4ES	22/07/2015 10:04	SEN Message				Ξ	
💐 🕵	Mrs Gillian Grosvenor	Racist Incident	02/02/2012 17:43	General Message		<b></b>	►		
🖣 🧕	Mrs Gillian Grosvenor	Fighting	31/01/2012 14:15	General Message		<b></b>	Þ		
😽 <u>ର</u>	Mrs Gillian Grosvenor	Fighting	22/09/2011 17:56	General Message		4			
💘 🙍	Mrs Gillian Grosvenor	Fighting	22/09/2011 17:55	General Message		4	►		
🖣 🧕	Mrs Gillian Grosvenor	Disruptive Behaviour	10/02/2011 15:07	General Message		<b></b>	Þ		
📲 🤶	Mrs Gillian Grosvenor	Disruptive Behaviour	10/02/2011 15:01	General Message		- A		-	
-1									
11 Owner	Το	Subject	Sent	Type	Attachments	Importance	Flag Status	*	📂 Open
-	(Multiple)	<preferredname> <pergmun></pergmun></preferredname>	22/07/2015 12:00	Uperalsined Ab		<b>A</b>			W Datata
	<multiple></multiple>	<preferredname> <yeargroup> <re< td=""><td>22/07/2015 13:00</td><td>Bebaviour Incid</td><td></td><td>1</td><td></td><td></td><td>× Delete</td></re<></yeargroup></preferredname>	22/07/2015 13:00	Bebaviour Incid		1			× Delete
	Aaron Mr. I	PreferredName> (YearGroup>, Che)	22/07/2015 13:05	Achievement A		1			
	rtavana@avampla.com	Auto forward: Chica, Jackson, Year, 2	22/07/2015 13:05	General Menance		•			
KS 🧑	Multiple>	Autonorwald, Childe Jackson, Teal 3,	22/07/2015 13:01	CEN Message				Ξ	
🖬 🎽	Mm Jappifer Deswell	Environmente Changeling, Vers. 4, 455	22/07/2015 13:01	SEN Message					
📉 🌺	Mis Jermier Dosweil	Pw. Marun Chapping, rear 4, 465	22/07/2013 11.30	SEN Message					
10 🐱	<multiple></multiple>	PerformedName>	22/07/2015 10:05	CEN Message			5		
🖬 🎽	<multiple></multiple>	Pupil aut of aphael	22/07/2015 10:05	General Message					
🛱 🎽	<multiple></multiple>	Popili dui or scribor	21/07/2015 11:44	General Message			*		
<b>.</b> V	Cindicple>		21/0//2013 11:38				<b>~</b>	Ŧ	
eued Mess	ages								
Owner	То	Subject	Queued	Туре	Attachments	Importance	Status/Scheduled		C Open
1 🔝	<multiple></multiple>	Meeting Reminder	21/07/2015 11:53	General Message			23/09/2015 13:00		💥 Delete
								- 1	
								- 1	

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.





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 <u>or</u> 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 <u>only</u> if you have one or more queued messages.

I

More Information: Viewing Received Messages on page 74

# **07**/Managing School Messages

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Sending a Behaviour Incident Message 104
Sending an Achievement Award Message 105
Sending a Pupil/Student Profile Message 105
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# 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.

- Select Focus | Attendance (or Lesson Monitor) | Deal with Unexplained Absences (InTouch) to display the Unexplained Absence Management page.
- 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.

 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.

U	nexpla	ined Absence	Manag	ement									?	🛃 🕄
	Period Fre	om: 05/09/2012	15	Select (	Group Type	Whole Scho	ol	•	Refresh	Q			Send Message	Code
	Period To	16/10/2012	15	Short Na	me Descri Who	iption Ile School Sele	cted			Search V				×
	🔲 Resol	ved Only										DATE	Apply to	
	Session		-										Attendance	BC
ł	Name F	ilter:												DF
	<b>V</b>	Student Name	Gender	Reg Group	Year Group	Date Of Birth	Events	From	То	Mark	Expected Return	Last Message Sent F	Responded	F
	<b>V</b>	Ahmed, Ackmar	Male	8E	8	29/12/1999	-	27/09/2012 AM	27/09/2012 PM	A N	Select a date 15		0	н
	V	Akmal, Mohammed	Male	8D	8	20/04/2000	-	24/09/2012 AM	24/09/2012 PM	N	Select a date 15	]		J
	<b>v</b>	Akram, Amina	Female	Q	13	12/06/1995		07/09/2012 AM	07/09/2012 PM	N	Select a date 15	]		M
	<b>V</b>	Amis, Dennis	Male	Ρ	13	11/04/1995	<b>T</b>	16/10/2012 AM	16/10/2012 PM	N	Select a date 15	]		O P
	<b>V</b>	Anderson, Jacob	Male	11E	11	23/05/1997	₹ •	12/10/2012 AM	12/10/2012 PM	A N	Select a date 15	]		R
	<b>V</b>	Archer, Glenda	Female	11C	11	16/08/1997	•	11/09/2012 AM	11/09/2012 PM	N	Select a date 15	]		T U
	<b>v</b>	Austin, Alison	Female	G	13	23/05/1995	-	05/10/2012 AM	05/10/2012 PM	A N	Select a date 15	]		V W
		Banfield, Paul	Male	G	12	03/02/1996	₹ •	01/10/2012 AM	01/10/2012 PM	A N	Select a date 15	]		
	1	Barker, Katie	Female	11A	11	10/04/1997	•	13/09/2012 AM	13/09/2012 PM	A N	Select a date 15	]	¥	
														-
		Sender	Receive	ed Date	Subject	t		Body	Apply to C	Comments				
1														

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 15	

 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.

5M5 Notification	
<b>\$</b>	
The following recipients do not have contact details recorded for the default communication method:	
Day, Mr Simon DAY, Mrs C TURNER, Mr A Mcfadden, Mrs Julie HULATT, Mrs Carole Thompson, Mr Keith Thompson, Mrs RICHARDS, Mrs M Crisp, Mrs L Pacci, Mr O YEOMAN, Mrs Benice YEOMAN, Mrs Chole Branston, Mr Chole Branston, Mrs Chole Branston, Mrs Chole Branston, Mrs Sonja Palfry, Miss Kelly Stevens, Mrs Nora Matejschuk, Miss L Edwards-Passey, Mrs Geraldine SINGH, Mr Anoop D'Arcy, Mr John D'Arcy, Mr Scheryl Brighton, Mrs Cheryl Brighton, Mrs Marcia	
Harrow, Mr Gregory Pickering, Mr Alan Pickering, Mrs Janet Hartwell, Mr Andy Hartwell, Mrs Trina	•
	0k

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

Send Unexp	lained Absence Message 🥏 🧬 🕄
Send	Send & Log
То	Litchfield, Vanessa (18/01/2011 AM)
Subject:	<preferredname>. <reggroup></reggroup></preferredname>
Message:	Arial 🔹 16 🔹 🖪 🖌 U   🚍 🚍 🖉 🛃 🔹 🔹
	<preferredname> has been absent on the following <periodsofunexplainedabsence>. Please respond by specifying the reason for the absence.</periodsofunexplainedabsence></preferredname>

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.

 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

Recipients	
Recipient Name	
CHADWICK, Mr NEIL	
CHADWICK, Mrs ELLEN	$\checkmark$

- 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.

sms Please Confirm	X
The following recipients do not have contact details recorded for the chosen communication method. Do you want to send the message to the other recipients?	
CHADWICK, Mr NEIL	
🖌 Yes 🗱 🕅	lo

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 <u>not</u> 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 <u>Primary</u> 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.

#### 07 | Managing School Messages

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*).

Review a Message	2 🛃 😨
Reply         Reply to All         Eorward         Print Preview	Delete
Type: General Message	Date: 19/12/2012 15:22
From: Mr Leonard Bradley(+447843439113)	Delivery Status: Sent
To:	Importance: Normal
Subject:	Owner: School
Anthony is ill today so he will not be at school	

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.

Student Name	Gender	Reg Group	Year Group	Date Of Birth	From	То	Last Message Sent
Bradley, Anthony	Male	9B	9	05/06/1999	19/12/2012 AM	19/12/2012 p5	

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).

Student Name	Gender	Reg Group	Year Group	Date Of Birth	From	То	Last Message Sent
Bradley, Anthony	Male	9B	9	05/06/1999	19/12/2012 AM	19/12/2012 p5	

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.

Im	aval	ined Absence B	lonon			_	_		_	_			_	6
'n	expia	aned Absence w	nanag	ement									-	
P	eriod F	rom: 19/12/2012	15	Select G	aroup Type	Whole School	bl	•	Refresh	0		Send		⊲ Code
P	eriod T	p: 19/12/2012	15	Short Nam	ne Descrip	otion				Search		Mess	age	-
					Whol	e School Selec	ted							î
Γ	Resol	ved Only									1	DATE Appl	y to	1
6	Session	& Lesson	-									Atter	idance	B
2														D
	Name	Filter:												Е
	र ¥	Student Name	Gender	Reg Group	Year Group	Date Of Birth	Events	From	То	Mark	Expected Return	Last Message Sent Responded		F G
	•	Abbot, Hannah	Female	9B	9	23/12/1998	-	19/12/2012 AM	19/12/2012	p5 N	Select a date 15	<b>√</b>		H I
		Bradley, Anthony	Male	9B	9	05/06/1999	-	19/12/2012 AM	19/12/2012	p5 N	Select a date 15			J
	•	Lewis, Sebastian	Male	8E	8	25/07/2000	•	19/12/2012 AM	19/12/2012	AM N	Select a date 15			M N
	•	Lewis, Sebastian	Male	8E	8	25/07/2000	-	19/12/2012 PM	19/12/2012	PM N	Select a date 15			P
	•	Pontin, Sue	Female	н	13	11/11/1994	-	19/12/2012 AM	19/12/2012	AM N	Select a date 15			S
	◄	Pontin, Sue	Female	н	13	11/11/1994	•	19/12/2012 PM	19/12/2012	PM N	Select a date 15			U V
	•	Umpkinson, Harriet	Female	8E	8	09/09/1999	-	19/12/2012 AM	19/12/2012	AM N	Select a date 15			W
l	D.	Umplineon Harriet	Famela	٥F	R	09/09/1999	-	19/13/3013 PM	19/12/2012		Select a date	П		
-														
		Sender	Receive	d Date	Subject			Body	Apply t	o Comments				
	I	Mr Leonard Bradley	19/12	2012 15:22				Show	Ap	ply				

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.

Unexplained Absence Management		?
Period From:     19/12/2012     IS     Select Group Type     Whole School     Refresh       Period To:     19/12/2012     IS     Short Name     Description       If Resolved Only     Session & Lesson     Vhole School Selected	Search Send Message Apply to Attendance	xde K B C
Name Filter:		)
🔽 🤽 Student Name Gender Ren Groun Year Groun Date Of Birth Events From To	Mark Expected Return Last Message Sent Responded	: G
R Anthony is ill today so he will not be at school	2 p5 N Select a date 15	4
	2 p5 N Select a date 15	
R A	2 AM N Select a date 15	4
R - R	2 PM N Select a date 15	-
	2 AM N Select a date 15	, З г
, Message	2 PM N Select a date 15	J
R Add to Log Close	2 AM N Select a date 15	N
Immininenn Harrist Esmals RE R NGING/1090 🖂 - 19/10/012 DM 19/10/	2012 PM N Select a date 🔚 🔍	
Sender Received Date Subject Body Ap	pply to Comments	
Mr Leonard Bradley 19/12/2012 15:22	Apply	
- 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.

od Fro	m: 30/04/2011	15	Select	Group Type	Whole Scho	l	•	Refresh	0		Send Moscard	
od To:	30/08/2011	15	Short Na	me Desc	ription				Search 0		Incessary	c
esolve	ed Only			Wh	ole School Sele	cted						
											Apply ta	o ince
ision 8	Lesson	•									- Married	
*	Pupil Name	Gender	Reg Group	Year Group	Date Of Birth	Events	From	То	Mark	Expected Return	Last Message Sent F	24
Z	James, Lucy	Female	9C	9	30/07/1997		27/05/2011 p2	27/05/2011 p2	N	Select a date 15	30/08/2011 16:35	
2	Jones, Molly	Female	9B	9	12/12/1996	•	27/05/2011 p2	27/05/2011 p2	N	Select a date 15		
7	McColl, Kirsten	Female	9B	9	01/07/1997	•	27/05/2011 p2	27/05/2011 p2	N	Select a date 15		
7	Middleton, Sarah	Female	9C	9	29/12/1996	•	27/05/2011 p2	27/05/2011 p2	N	Select a date 15		
2	Raggobeer, Odee	Male	9B	9	26/05/1997		27/05/2011 p2	27/05/2011 p2	N	Select a date 15		
7	Shariff, Ali	Male	9C	9	22/08/1997	•	27/05/2011 p2	27/05/2011 p2	N	Select a date 15	22/08/2011 14:51	n
7	Young, Kathryn	Female	9B	9	15/11/1996	•	27/05/2011 p2	27/05/2011 p2	N	Select a date 15		Ļ
S	ender	F	Received Da	te :	Subject		Body	Apply	/ to Comme	nts		

#### 07 | Managing School Messages

- 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.
- 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.

riod Fro riod To: Resolve ession {	m: 30/04/2011 30/08/2011 ed Only & Lesson	Select Group Ty Short Name	PP Whole School lescription Whole School Selected		Refresh	Sea	arch		Send Message	nce
- 22	Punil Name Ge	nder Ren Groun Year Gr	oun Date Of Birth Events	From	То		Mark	Expected Return	Last Message Sent R	
F S	he is going to be	absent whole weel	c due to flu.			p2	N	Select a date 15	30/08/2011 16:35	
FI FSI FSI F F F F	rom: Duchy School (r ent: 30 August 2011 o: Parent01.indy@lat ubject: Lucy James, 9 nportance: High ucy James has be y specifying the r	mailto:Independent@la 16:36 I-la01.com IC en absent on the fo eason for the abser	b-la01.com] pllowing 27/05/2011 p nce.	p2. Please res	pond	p2 p2 p2 p2 p2	N N N N	Select a date 15 Select a date 15 Select a date 15 Select a date 15 Select a date 15	2208/2011 14 51	
F			1999	Add to Log	Close	p2	N	Select a date 15	]	Į
S	iender	Received Date	Subject	Body	10 10	Apply to	Comme	ents		
×	Mrs MARGARET JAMES	30/08/2011 16:37	RE: Lucy James, 9C		Show	App	ly ]			

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.

riod Fr riod To Resol	om: 30/04/2011 30/08/2011 ved Only	15	Select	Group Type ame Desc Wh	Whole Scho ription ole School Sele	ol	•	Refresh	Se	earch		Send Messa	ige to
ession	& Lesson	•										Attend	lance
□ 😤	Pupil Name	Gender	Reg Group	Year Group	Date Of Birth	Events	From	То		Mark	Expected Return	Last Message Sent	Re
•	James, Lucy	Female	9C	9	30/07/1997		27/05/2011 p2	27/05/2	011 p2	N	Select a date 15	30/08/2011 16:35	
শ	Jones, Molly	Female	9B	9	12/12/1996		Events	Made	Inte	Commo			
2	McColl, Kirsten	Female	9B	9	01/07/1997		27/05/2011 p2	N	0		nt ne is going to be abser hole week due to flu.	it 🔺	
2	Middleton, Sarah	Female	9C	9	29/12/1996	•					2 3 20 9		
2	Raggobeer, Odee	Male	9B	9	26/05/1997					F [n la	rom: Duchy School nailto:Independent@lal 01.com]	b-	
<b>v</b>	Shariff, Ali	Male	9C	9	22/08/1997					S	ent: 30 August 2011 16	s:36 ()	1
L	Young, Kathryn	Female	9B	9	15/11/1996	•	27/05/2011 p2	27/05/2	011 p2	N	Select a date 15	]	Ų
	Sender	F	leceived Da	te :	Subject		Body		Apply	to Comme	ents		
	Mrs MARGARET JA	MES	30/08/2011	16:37	RE: Lucy Jame	es, 9C	5	show	Ap	ply			

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.
- 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

#### 07 | Managing School Messages

•	
Code	Description
-	All should attend / No mark recorded
х	Non-compulsory school age absence
1	Present (AM)
1	Present (PM)
В	Educated off site (not dual reg)
С	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)
н	Annual family holiday (agreed)
1	Illness (not med/dental appoints)
J	Interview
L	Late (before reg closed)
М	Medical/Dental appointments
N	No reason yet provided for absence
0	Unauthorised circumstances
Р	Approved sporting activity
R	Religious observance
S	Study leave
Т	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.
- 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.
- 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.
- 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.

Mustification	
The following recipients do not have contact details recorded for the default communication method:	
Abbot, Mrs Rachael	۲
C	ж

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.

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:

View Contacts icon

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.

In Touch	
Do you want l	to send a message to the teacher about the Not Approved sections?
	Yes No

 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.

sums Notification	
The following recipients do not have contact details recorded for the def- communication method:	ault
Abbot, Mrs Rachael Abbot, Mrs Rachael Abbot, Mrs Rachael Abbot, Mr Sachael Abbot, Mr Jaswinder Abbot, Mr Jaswinder Abbot, Mr Jaswinder Abbot, Mr Jaswinder Abbet, Mrs E ABLETT, Mrs Florence Ablett, Mrs Ins Florence Ablett, Mr Lorce Ablett, Mr Lorce Ablett, Mr Lorce Ablett, Mrs Florence Ablett, Mr Intace Ablett, Mr S Ins ACKROYD, Mrs TINA ADAIS, Mrs Loraine Adam, Mrs J Adams, Mrs J Adams, Mrs J Adams, Mrs J Adams, Mrs J Adams, Mrs J ADDISON, Mrs D Afzal, Mr Kamran AGATHOCLEOUS, Mrs G ACATHOCLEOUS, Mrs G ACATHOCLEOUS, Mr D Ahlman, Mr Markus AHMAD, Mr S Ahmed, Mr Edwin Ainsworth, Mrs Rebecca Aitken, Mr J AKHTAR. Mr Satiad	
	Ok

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.

 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.



Recipients	
Recipient Name	
CHADWICK, Mr NEIL CHADWICK, Mrs ELLEN	

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.

 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.

School Even	ıt .	? 🔀
Description		~
Category	▼	Categories
Start time	27/01/2011 🚺 08:30 🔽	All day event 🔲
End time	27/01/2011 🚺 09:00 💌	Recurrence
Private		
Reminder		
Days in Adva	ance 🔲 🧶 1 Week Before 🔲 For	tnight Before 🛛
	Ok	Cancel

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**.

MyR	eminders	
<u>Read</u>	<u>Sent</u>	Subject
	24/01/2011 10:32	Send Message about Generic event on 27/01/2011
$\sim$	24/01/2011 10:25	Send Message about Personal Task on 25/01/2011
	24/01/2011 10:25	Send Message about Staff Training Day on 24/01
$\sim$	23/01/2011 00:00	Send Message about Generic event on 26/01/2011
$\sim$	19/01/2011 16:27	Follow up Behaviour Incident - Persistent Lateness
_		
		More

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

sins Edit Person	al Task			
Edit Task Detai	ils			
Description	Send Message about Gener	ic event on 27/01/2011		
Start Date	24/01/2011	Due Date	24/01/2011	
Priority	Medium 💌	Status	Not-Started	~
Notes				~
				~
Reminder 🔽	24/01/2011	Add To Personal Diary	<b>V</b>	
Send Message	•	Print Report 📥	ОК	Cancel
				.:

- 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.

earch Attendance		2 🛃
Percentage Attendand	the Filter From: 13/12/2015 15 To: 12/01/2016 15 Search	Send Messag
Percentage Range	Select Group Type Whole School   Refresh   Sessions  Lesso	ns
Any	Short Name Description	
O At Least 0	Whole School Selected	
Between     And     O		
O At Most 0		

- 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.

Select Group T	ype Year Group	Refresh ③ Sessions ① Lessons
Short Name	Description	
8 9 10 11 12 13	Year 8 Year 9 Year 10 Year 11 Year 12 Year 13	

- 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.

	Name	DOB	Attendance Percentage	Possible Attendance	Year Group	Reg Group	House	Gender	Ad No	
🗹 👯	Abbey, Jimmy	17/04/1998	0	26	8	8A		Female	003599	
🛃 🗹	Burns, Paul	01/11/1997	0	26	8	8A		Male	003607	
👱 🙀	Cronin, Michael	02/03/1998	0	26	8	8A		Male	003613	
🗹 🏯	Edgeworth, Rosemary	18/06/1998	0	26	8	8A		Female	003618	
2 🍇	Garcha, Inderjeet	26/03/1998	0	26	8	8A		Female	003732	V

- 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.

1

#### 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.

Select Achievements		2 🖋 🕄
Achievement Filter	From: 24/12/2010 15 To: 23/01/2011 15 Search	Send Message
Search Condition  O Achievement Types  Points  Award Types	Select Group Type Whole School  Contemporation Whole School Selected	
Code         Description           AA         Academic Achievement           COM         Community Event           MUS         Musical Activity           EXC         Extra-curricular Activity           EXC         Extra-curricular Activity           OW         Outstanding Work           OTH         Other           ACAD         Academic           ACCI         Accident		

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

Search Co	ndition	0.5.1.	<b>O</b> 4 1 <b>-</b>
Achiev	ement lypes	OPoints	Award Types
Code	Description		
AA COM MUS EXC EE OW OTH	Academic Ac Community E Musical Activ Extra-curricu Excellent Effe Outstanding Other	hievement vent ity lar Activity ort Work	0
ACCI	Accident		

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

Points

Search Condition	n t Types	Points	Award Types
<ul> <li>Any</li> <li>At Least</li> <li>Between</li> <li>Less Than</li> </ul>	D D	And	0

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

earch Co	ondition		
Achie	vement Types	O Points	Award Types
Code	Description		
С	Commended		
M	Ment		
814	8 Merit Letter		
BC	Bronze Certif	icate	
3C	Gold Cortfor	to	
PC	Platinum Cer	tficate	
PR	Prefect Rado	A	
	r relieut baug	0	

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.

 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.

Select Group T	ype Year Group	Refrest      Sessions      Lessons
Short Name	Description	
8 9 10 11 12 13	Year 8 Year 9 Year 10 Year 11 Year 12 Year 13	

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.

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

Behaviour Notifications		2 🛃 🕄
Select Behaviours	From: 16/04/2011 15 To: 15/05/2011 15	Send Message
Search Condition	Select Group Type Whole School  Refreat Short Name Description Vhole School Selected	
Code     Description       ASS     Assault       BULL     Bullying       PAR     Contact with Parents       DF     Defiance       DISR     Disruptive Behaviour in Class       FT     Fighing       HW     Homework Issue       IS     Illicit Substances		

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

Behaviour Types

Rehavior	In Types O Points O Action Types	
O Denavior		
Code	Description	
ASS	Assault	
BULL	Bullying	
PAR	Contact with Parents	
DP	Damage to Property	
DF	Defiance	
DISR	Disruptive Behaviour in Class	
FT	Fighting	
HW	Homework Issue	

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

#### Points

Search Condition	
O Behaviour Typ	es 💿 Points 🔘 Action Types
⊙ Any ○ At Least ○ Between	And
OLess Than	

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

<ul> <li>Behaviour</li> </ul>	Types 🔘 Points 💿 Action Types	
Code	Description	- 4
COOL	Cooling Off Period	(
DETN	Detention	
DP	Discussed with Pupil	
EXCF	Fixed Period Exclusion	
	Isolation	
LUNDET	Lunchtime Detention	
OR	On Report	
EXCP	Permanent Exclusion	
D D D D L L		

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.

 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.

Select Group Type	Year Group Refresh
Short Name	Description
8 9 10 11 12 13	Year 8 Year 9 Year 10 Year 11 Year 12 Year 13

- 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.

 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.

#### 07 | Managing School Messages

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			ue	Wed		Thu		F	'n
1	Ma FB Maths		Te B RT Techn		Ma FB Maths		Ge RM Langu:		FB I	Ma Maths
2	кв	Ar Te KB Art Rc RT Techu		Te Techn	En JA Englisl		Fr MK Langu:		AP	Gg Humar
3	ĸл	Hi Humar	En JA Englisl		Sc J JXE Scienc		Pe BK. Gym		JA	En Englisl
4	JA	En Englisl	Pe nglisl BK. Gym		Pe Sc BK Gym JXE Scienc		Ma FB Maths		кв	Ar Art Rc
5	JXE	Sc Scienc	Fr MK Langu:		RT	Fe Techn	SA	Ps Scienc	HG	Re Humar

The report layout can now be modified.

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

sms Send a Student Timetable Message								
Layout Options								
O Use a predefined layout	Stude	ent Timeta	ble					
C Supply your own layout								
Output Options								
🗹 Student								
InTouch Contact								
Head Of House								
Head Of Year								
Registration Tutor								
				OK		Cancel		

- 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).

 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.

<b>Timetable</b> - <b>Mrs A Abell</b> as at 21/04/2010								
	Mon	Tue	Wed	Thu	Fri			
1	10y/Sc2 Science Lab	9y/Scl Science Lab	11y/Sc2 Science Lab	13A/Bil Science Lab	13A/Bil Science Lab			
2	PPA	9y/Scl Science Lab	lly/Sc2 Science Lab	13A/Bil Science Lab				
3		10y/Sc2 Science Lab	7D/Sc Science Lab	9y/Scl 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.

Send a Staff Timetable Me	ssage		 ?
<ul> <li>Use a predefined layout</li> <li>Supply your own layout</li> </ul>	Staff Timetable		
		OK	Cancel

- 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.

1 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**.

earch by Name				Season	June Exams 2	012		•
vailable Students				Select	ed Students			
Name	Reg	House		Name		Reg	House	Year(s)
Agustino, Pollie	U5M	HOLLES	Ξ					
Ahne, Brigit	U5M	HOLLES						Registration Group
Alkeiser, Fannie	U6H	FITZW						
Allara, Ethalyn	U5L	TYRC						House(s)
Alvelo, Olene	U5Y	DE VE						
Ameigh, Serenity	U5Y	HOLLES		>				
Andreu, Collette	U5M	DE VE						
Arehano, Elenor	U6E	TYRC		>>				
Auyong, Lawrie	U5M	DE VE						
Bachor, Helmine	U5X	TYRC		<				
Bacigalupo, Janis	U6C	TYRC						
Bahun, Jameela	U6J	DE VE		~~				
Bannerman, Sita	U5L	HOLLES						
Barak, Emestine	U6F	TYRC						
Bartosik, Omella	U6F	TYRC						
Baseler, Amber	U6E	FITZW						
Bastian, Blanca	L6G	FITZW						
Battiata, Hafza	U5M	DE VE	Ŧ					

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.

sus Send a Pupil Exam Timetable Message									
Layout Options									
Use a predefined layout	Student Exam timetable		-						
Supply your own layout									
Output Options									
Pupil									
InTouch Contact									
Head Of House									
Head Of Year									
Registration Tutor									
Preview		ОК	Cancel						

- 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.

IndMdual Candidate Time	stable							
Season : Name : Candidate	Numb	J Y Der: 2	une Exams vette Widd 018	2012 en Mor	rison	<b>Year</b> : U6 <b>Reg Group</b> : 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

 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.

## I

#### 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).

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

🏶 Year(s)	? 🗙
Search by description	
Description	
Nursery	
Reception	
Year1	
Year 2	
Year 3	
Year 4	
Year 5	
Year 7	
Year 8	
Year 9	
Year 10	
Year 11	
Year 12	
Year13	
	Cancel

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.

Registration Group(s)	? 🗙
Search by description	
Description	^
NHX	
NHY	
BHX	
BHY	
1HX	
1HY	
2HX	
2HY	_
3HX	- 11
3HY	_
4HX	- 11
4HY	- 11
OH1	- 11
	- 11
7HXB	- 11
ZHYB	
7H×B	
7HYB	
7HXG	
7HYG	
7HYY	~
	-

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.

Search by description
Description
Red
Yellow
Blue
Green
Liockett's
Doukins
Jetha's
Lawrence
Mackenzie's
Owen's
Patrick's
Quick's
OK Cancel

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.

Late Notifications		ی 🚱 🛃
From: 19/12/2011 5 To: 18/01/2012 5 Session & Lesson v	Select Group Type Whole School  Refm Short Name Description Whole School Selected	et Number of Lates Total Minutes Late O At Least 0 O Between 0 And 0 O Less Than 0

 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.

Select Group	Type Year Gro	up	•	Refresh
Short Name	Description			
8	Year 8			
9 10 11 12 13	Year 9 Year 10 Year 11 Year 12 Year 13			0

- 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.

ate Notifications		💿 🐕 🤅
From.         08/01/2012         15           To:         18/01/2012         15           Session & Lesson	Select Group         Year Group           Short Name         Description           8         Year 8           9         Year 9           10         Year 10           11         Year 11           12         Year 13           Year 13         Year 13	Refreet     Number of Lates     Total Minutes Late       Image: All Least     3       Image: Between     And       Image: Between     And       Image: Between     And
Image: Name     DOB       □     ★     Dorian, Jon     07/11/1	Year Group Reg Group House Gender Ad No 1998 8 8A Hooke Male 003795	Number of Lates Total Minutes late

- 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 <u>only</u>. If the preferred method of communication for a member of staff is set to SMS messaging, <u>both</u> 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 <u>all</u> 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.

💖 Browse Missir	ng Marksheet Alerts Definitions				
📄 New 🕌 Search	📑 Open 💥 Delete 🚍 Print	😽 Browse 🕂 Next	Previous	🔄 Links	👻 😨 Help 💥 Close
Description					
Description		Alert Dates			
<					>

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.

View Missing Mar	ksheet Alert Definition					
💾 Save 🛛 🗐 Und	lo 📥 Print			🚽 Links	🝷 📀 Help  🛃 U	npin 💥 Close
1 Result Sets 2 M	farkheets 3 Alert Dates					
Description						
1 Result Sets	Paquit Cata	Madula	Lee	Looked Date	Looked Pu	
	III III V12 Half Term 1		Yee	02/09/2011	Advise Placker	
	IB V12 Half Term 2	CES Assessment	Yee	02/03/2011	Adrian Blacker	
	BY12 Half Term 3	CES Assessment	Yes	02/09/2011	Adrian Blacker	
	BY12 Half Term 4	CES Assessment	Yes	02/09/2011	Adrian Blacker	
	B Y12 Half Term 5	CES Assessment	Yes	02/09/2011	Adrian Blacker	
	B Y12 Half Term 6	CES Assessment	Yes	02/09/2011	Adrian Blacker	
	IB Y13 Half Term 1	CES Assessment	No			=
	IB Y13 Half Term 2	CES Assessment	No			~
Group Filter						
Refresh Marks	sheets					
2 Markheets						
	Marksheets	Owner		Туре		
3 Alert Dates	Alart Data					
	Alen Date				Nev Nev	v
					👘 🖾 Ope	
					🛛 💥 Del	ete
	L					
						~

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

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- 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.

SIMS Group Browser			? 🛛
Select the effective Group date From 11/01/2012	То	11/01/2012	Refresh
Ethnicity     Home Language     First Language     New Intake Group     Registration Group     Secial Needs     Year Group			
National Curriculum Year     Assessment User Defined     Exam Performance Cohort     User Defined Groups     Discover     House			
		Applu Clear	Selection Cancel

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).

W. W. C. H.							
View Missing Mar	ksheet Alert Delinition					-	
💾 Save   🏐 Und	lo 📥 Print			🔄 Lin	nks 🔻 😨 Help	🚰 Unpin	💢 Close
1 Result Sets 2 M	farkheets 3 Alert Dates						
Description							
D coonplicit							
1 Result Sets	D NC					<b>^</b>	
	Hesuit Sets		LOC	Locked Date	LOCKED BY		
	TRK Year 13 Spring	CES Assessment	No				
	Year 10	CES Assessment	No				
	Year 10 Autumn Term	CES Assessment	No				
	Year 10 Spring Term	CES Assessment	No				
	Vear 10 Summer Term	CES Assessment	No				
	🔲 Year 11	CES Assessment	No				
	📃 Year 11 Autumn Term	CES Assessment	No			~	
Group Filter							
Potrock Marky	hanta						
nellesri Maiks	sneets						
2 Markheets	Madahasta	0		T			
	Marksheets	Uwner		lype			
	2 History GLSE Progress	Fracke Kevin Jacob	5	Llass			
3 Alert Dates							
<u>o</u> Aren Duitos	Alert Date					New	
					- Sec		
							~

- 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.

sins Add / Edit	an Alert Date	? 🛛
Alert Date	17/01/2012	
	OK	Cancel

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.

View Missing Mar	ksheet Alert Definition						
💾 Save 🛛 🍎 Und	lo 📥 Print			🗐 Lin	iks 🔻 😨 Help	🔐 Unpin	💥 Close
1 Result Sets 2 M	farkheets 3 Alert Dates						
Description							
<u>1</u> Result Sets	Besult Sets	Module	Loc	Locked Date	Locked Bu	~	
	TBK Year 13 Spring	CES Assessment	No	200//02 2 4/0	2001102.03		
	TRK Year 13 Summer	CES Assessment	No				
	Year 10	CES Assessment	No				
	🔲 Year 10 Autumn Term	CES Assessment	No			-	
	📃 Year 10 Spring Term	CES Assessment	No				
	🗹 Year 10 Summer Term	CES Assessment	No				
	📃 Year 11	CES Assessment	No				
	📃 Year 11 Autumn Term	CES Assessment	No			~	
2 Markheets	Marksheets	Owner	, ,	Туре			
			3				
3 Alert Dates							
- Alch Dates	Alert Date					New	
	17/01/2012					Open	
						Delete	
						Delete	
							_

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.

💖 Find Behaviour Incident Alert Definition 🚽			
📄 New 👬 Search 📼 Open 💥 Delete 📥 Pri	int 🛛 🐺 Browse 🚽 Next 合 Previous		📀 Help 💥 Close
Description	Behaviour Type <a href="https://www.englight.com">KAny&gt;</a>	~	
Description	Behaviour Types		

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.

Behaviour Incident Alert Definition	Detail				
💾 Save 🔄 Undo 📥 Print				📀 Help 🚮	Unpin 💥 Close
<u>1</u> Basic Details <u>2</u> Behaviour Types	3 Recipient Roles 4 Recip	pients			
<u>1</u> Basic Details					
Description					
Resend On Lindate	1				
2 Behaviour Types					
Description				^ Cł	heck All
Assault					ncheck All
Bullying					ICHOCK AI
Damage to Property					
Disruptive Behaviour in Class	the Classman				
	the Classroom			*	
3 Recipient Roles					
Role	Internal Messaging	Email	Mobile		
Registration Tutor					
Head of House					
Head of Year					
4 Recipients					
Name	Internal Messaging	Email	Mobile		Add
				1000	Remove

- 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.

SIMS Find Recipients					? 🛛
🐆 Find Recipients					
🛉 Search 👻 🚍 Print 🗌					
Surname	Forename		Role	Head of Year	~
Staff Code					
Name		Staff Code			
Alsup, Miss Tatjana		IA			
Barabin, Mr Lamprecht		KT			
Bleininger, Ms Alanna		PQ			
Shamir, Mr Lonnie		XD			
Vansteenberg, Mrs Amina		LK			
Varone, Mrs Maura		IY			
Wakabayashi, Mrs Uschi		CY			
					OK Cancel
<ol> <li>7 matches found</li> </ol>					

- 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.

Save Details 2 Be <b>1 Basic Details</b> Description Resend On Upda <b>2 Behaviour Types</b> Description	Print ehaviour Types <u>3</u> R Assault, tte	ecipient Roles <u>4</u> Recip Bullying	pients		Help	🚰 Unpin 💥 Close
Basic Details <u>2</u> Be <u>1</u> Basic Details Description Resend On Upda <u>2</u> Behaviour Types Description	shaviour Types <u>3</u> R Assault. Ite	ecipient Roles <u>4</u> Recip Bullying	pients			
Basic Details     Description     Resend On Upda     Behaviour Types     Description	Assault.	'Bullying				
Basic Details     Description     Resend On Upda     Behaviour Types     Description	Assault,	'Bullying				
Description Resend On Upda 2 Behaviour Types	Assault,	/Bullying				
Resend On Upda	ite 🔽					
2 Behaviour Types	ine 🔽					
2 Behaviour Types						
Description						
Docomption					^	Check All
Assault						Unabaak All
Bullying						Uncheck All
Damage to F	roperty					
Defiance						
Disruptive Be	ehaviour in Class					
	enaviour Outside the C	assroom			¥	
3 Recipient Roles						
Role		Internal Messaging	Email	Mobile		
Registration Tu	tor	V	V			
Head of House			¥	V		
Head of Year		V	V	V		
4 Recipients						
Name		Internal Messaging	Email	Mobile		🖶 Add
Bagnall, Mrs L	lizzie					E Remove
Shamir, Mr Lo	nnie	✓				

- 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 <u>internal</u> 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 <u>all</u> 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.

No Find Exam Reminder Alert Definition		
📄 New 📫 Search	n 营 Open 💥 Delete 🚍 Print 🛛 🔀 Browse 🕂 Next 🏫 Previous 🖉	😢 Help 💥 Close
Description		
Description	Active	

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.

Exa	m Reminde	er Alert Definiti	on Detail								
Bs	ave 👘 U	ndo 📥 Print					2	Help	🚰 Unpin	XCI	ose
<u>1</u> Bas	sic Details	2 Recipients	3 Alerts Forecast								
											~
<u>1</u> E	Basic Detail	3									
	Description										
	Days In Adv	ance		~							
2 F	Recipients										
-	Name		Next Exam	Student Email	Student Mobile	Contact Email	Contact Mobile		🖶 Add		
									- Pame		
									- Nem	Jve	
3 A	lerts Forec	ast									
_	Mobile Alert	s 0			E	mail Alerts	0				

- 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.

SIMS Find Students								? 🗙
💖 Find Students								
🛉 Search 👻 🚍 Print 📗								
Surname		Forename						
Tier <any> 🖌 🛄</any>	Year Group	<any> 💊</any>	•	Reg. Group	11HXY 🖌	House	<any></any>	<b>*</b>
Name	Year Group	Reg. Group	House	Gender	Admission I	Number		<u>^</u>
Apela, Kimberly	11	11HXY		Male	004057			
Bergdoll, Tercero	11	11HXY		Male	003950			
Brackelsberg, Robina	11	11HXY	Yellow	Female	003939			
Caron, Frances	11	11HXY		Male	004066			
Dornbrook, Tranter	11	11HXY	Yellow	Male	003869			
Dugar, Hani	11	11HXY		Male	003962			
Freker, Sherry	11	11HXY		Female	004017			_
Gouge, Shayne	11	11HXY	Yellow	Male	003917			
Griblin, Bria	11	11HXY	Yellow	Female	003933			
Grotts, Lela	11	11HXY		Female	004060			
Kalkwarf, Ravindra	11	11HXY		Male	003993			
Keshishian, Gratien	11	11HXY	Yellow	Male	003884			
Lahm, Hiltrud	11	11HXY		Female	004068			20
Minaer Kiplina	11	11HXY	Yellow	Male	003894			<b>_</b>
							ОК	Cancel
1 24 matches found								.:

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.

en la entre					<b>A</b> 1	
Save 🕘 Undo 🔛 Prin					<b>W</b> F	ieip 🚰 Unpin 💢 Cl
isic Details 2 Recipients	s <u>3</u> Alerts Forecast					
Basic Details						
Description	Year 11 - GCSE -	w/c 21/01/2019				
Days In Advance	2	~				
Recipients						
Name	Next Exam	Student Email	Student Mobile	Contact Email	Contact Mobile	🖶 Add
Freker, Sherry	24/01/2019	V				Remove

- 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.

懒 Find Cumulative Achieven	nent Alert Definition		
📄 New 🎽 Search 🖾 Open 🖇	🕻 Delete 📥 Print 🛛 🐺 Browse 🕂 Ne	xt 👚 Previous	😨 Help 💥 Close
Description	Award Type <any></any>	▼ Year Group	<any> 🔻</any>
Description	Award Type	Year Groups	Points Threshold

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.

<u>1</u> Basic Details			
Description			
Award Type		▼	
Year Groups	Description	Check All	
	Nursery	_ Uncheck All	
	Reception		
	Year 1		
	Year 2		
	Year 3		
	Year 4		
	Year 5	-	
Points Threshold			

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 <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.



#### 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.

婉 Find Exam Results Definition		
📄 New 👬 Search 📼 Open 💥 Delete 🚍	Print 🛛 🐺 Browse 🕂 Next 👚 Previous 🗍	🐵 Help 💥 Close
Description	Exam Season	<b>v</b>
Description	Exam Season	Embargo End Date and Time

 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.

Exam Results Definition Detail			
💾 Save 🛛 🏐 Undo 📥 Print	🙆 H <i>i</i>	elp 🚰 Unpin 💥 (	Close
1 Basic Details 2 Recipients			
			~
<u>1</u> Basic Details			
Description	GCSE Results 2012 - Year 11 - Reg Group 11A		
Exam Season	June (Summer) Exams 2012		
Embargo End	17/08/2012 12:10		
2 Recipients			
Name	Student InTouch Contact Registration Tutor Head Of House Head Of Year	🖶 Add	
		Remove	
			~

- 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.

SIMS Find Stue	dents										?	X
懒 Find Stu	dents											
📫 Search 👻	🚔 Print											
Surname				Forename				SE	N Status 😽	Any>	~	
Tier	<any></any>	¥	Year Group	<any></any>	¥	Reg. Group	<any></any>	<b>v</b>	House	<any></any>	*	]
Name			Year Group	Reg. Group	House	Gender		Admission N	umber	SEN Status		
										OK	Cancel	

- 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.

sums Find Students						?	
rind Students							
🙀 Search 👻 🚍 Print							
Surname		Forename			SEN Status	<any> 🗸</any>	•
Tier 🛛 🔨 🔽	Year Group	<any></any>	• Re	g. Group	11A 🗸 House	<any> 🖌 📈</any>	5
Name	Year Group	Reg. Group	House	Gender	Admission Number	SEN Status	^
Albanie, David	11	- 11A		Male	004099		
Amis, Joshua	11	11A	Curie	Male	003275		
Ashfield, Angela	11	11A	Curie	Female	003280		
Benter, Francessca	11	11A	Newton	Female	003414	No Special Educatio	
Blackett, Yoland	11	11A	Flemming	Female	003292		
Cruikshank, Barnaby	11	11A		Male	004110		
Dampton, Levi	11	11A		Male	004111		_
Holmes, Tom	11	11A		Male	004122		
Hunter, Isabelle	11	11A		Female	004123		
Jones, James	11	11A	Flemming	Male	003330		
Lester, John	11	11A	Boyle	Male	003336		
Malik, Saima	11	11A	Flemming	Female	003422	No Special Educatio	
Meally, Michelle	11	11A	Flemming	Female	003354		
Moore Steven	11	114	Newton	Male	003357		×
						OK Cance	<u>ا</u>
<ol> <li>26 matches found</li> </ol>							

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.

Еха	am Results Definition Detail							
<b>!!</b>	Save \mid 🄄 Undo 📥 Print					📀 Hel	p 🚰 Unpin 🖇	💢 Close
1 Ba	isic Details 2 Recipients							
								~
1	Basic Details							
	Description	GCSE Results	2012 - Year 11 - Reg	Group 11A				
	Exam Season	June (Summer	) Exams 2012		~			
	Embargo End	17/08/2012 1	2:10					
2	Recipients							
	Name	Student	InTouch Contact	Registration Tutor	Head Of House	Head Of Year	🖶 Add	
	Albanie, David	V				^	Remove	5 1
	Amis, Joshua	¥					- Hellove	
	Ashfield, Angela	¥						
	Benter, Francessca	¥				=		
	Blackett, Yoland	V						
	Cruikshank, Barnaby	$\checkmark$				_		
	Dampton, Levi	¥						
	Holmes, Tom	✓						
	Hunter, Isabelle	V						
	Jones, James	✓						
	Lester, John	✓						
	Malik, Saima	V				*		~

- 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.

Exam Season	June (Summer) Ex	ams 2012		💌 Embargo End	
Exam Result Definition	Test			~	
ecipients					
Name	Student	InTouch Contact	Registration Tutor	Head Of House	Head Of Year
Benter, Francessca	$\checkmark$	$\checkmark$			~
Malik, Saima					
Sama, Sana					
Zog, Simon					≡.
Amis, Joshua	$\checkmark$	$\checkmark$			
Waldock, Tanya					
Rosenberg, Richard					
Swayne, Matthew					
Meally, Michelle					
Ashfield, Angela					
Morton, Vicki		—			
Blackett, Yoland	<b>V</b>				~
					Send C

- 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.

SIMS . ne	et 🛛 🔀
<b>(i)</b>	Messages successfully sent.
	ок

- 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.

Print a	und Send Letters					?×
🥎 Pi	int and Send Letters					
Mi Sea	rch					
From	26/02/2012 🔂 to	26/03/2012	Group Type	Year Group	¥	
Short I	Name Description					
7 8 9 10 11 12 13	Year 7 Year 8 Year 10 Year 11 Year 11 Year 13 Year 13					
Sele	ect All Deselect All					
			< <u>B</u> ack	<u>N</u> ext >		

 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 <b>From</b> and <b>to</b> 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.

Print and Send Letters			? 🔀
Criteria			
Letters Available	Turn of Letter	Allenderer	Lates Options
Lates.doc	Lates	Sessions	Marks to check
			State Before Registration Closed
			Late After Registration Closed
			O Both Late Before and After
			Include students with the following number of these marks
<		>	⊙ Any
Output Options			O At Least
<ul> <li>Preview in Word</li> </ul>	O Produce data file only (CSV form	nat)	🔿 Less Than
	- C Bask	Dint	
	Каск		Lancel

- 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).

Chosen Code Options			
Codes			
Include students with the following number of these marks			
• Any			
O At Least			
C Less Than			

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

Lates Options			
Marks to check			
Late Before Registration Closed			
C Late After Registration Closed			
C Both Late Before and After			
Include students with the following number of these marks			
<ul> <li>Any</li> </ul>			
C At Least			
C Less Than			

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.

Percentage At	tendance Options	
Include students with the following percentage attendance		
<ul> <li>At Least</li> <li>Less Than</li> <li>Between</li> </ul>	and	

### Unexplained Absence

Include students with the following number of unexplained absences:

- Any
- At Least

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Select the appropriate radio button and enter the required number of marks.

Unexplained Absence Options
Include any students with the following number of unexplained absences Any At Least
Include Post Registration absences only

#### Continuous Absence

Applicable to Sessions Only

Continuous Absence Options
Include students who are absent and have been absent without explanation for the following number of sessions
• At Least

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.

 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.

sims Attach Letters	2 ? 🛛
Attach Letters to the Document Management Serve	er for:
Name Hutchinson, Roger Kaur, Samreen Kimptage, Olivia Mason, David McKinnon, Ali Peacock, Chris Peterson, Ben Price, David Rainey, Adele Rhodes, Mary	
Check All Uncheck All	OK Cancel

 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.

sms Send Attendance Letter Message	? 🛛
Output Options Student InTouch Contact Head Of House Head Of Year Registration Tutor	
	OK Cancel

- 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).

Creating Letters	0/10

12. If a primary email address has not been recorded for any of the intended recipients, the following dialog is displayed.

5MS Contact Details	x
<b>\$</b>	
The following recipients do not have a primary email address and so cannot receive attendance letters.	
Mr Del Rainey	
Mrs S Price	
Mr Jim McKinnon Mrs Karen McKinnon	
Mr R Peacock	
Mrs MICHELLE Peacock	
Mrs J Rhodes	
Ok	

- 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.

Send Attend	lance Letter Message 📀 🕴	7 🕄
Send	Send & Log	
То	Linked Adults of Adele Rainey 📑 Linked Adults of David Price 📑 Linked Adults of Ali McKinnon	١
Subject:	<preferredname>. <yeargroup>. <reggroup></reggroup></yeargroup></preferredname>	
Attached:	AttendanceLetter.pdf	
т	Total Message Size: 78KB of 4MB. Maximum message size is 4MB.	
Message:	(Arial ▼ (12 ▼ ) ■ ▼   Β Ι U   Ξ Ξ   Ξ Ξ   𝒞   🛃 ▼ 急 ▼	
	Please find attached a letter relating to your <son daughter="">'s attendance.</son>	2

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<sup>®</sup> 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.

*						
ໜ Find Individual Report	🏇 Find Individual Report					
📄 New 🇌 Search 🖆 Open 💥 Delete 🚔 Print 🗔 E	rowse 😽 Next 👚 Previous	😢 Help 💥 Close				
Individual Report Name	Owner All Individual Reports - Select Category	Q				
Name	Owner	A				
KS2 P1 Student England 2012						
KS2 P2 Comparative England 2012						
KS2 P3 Comp TAs by gender England 2012						
KS2 P4 Comp Tests by gender England 2012						
Mock Results - L6	Shania Highsmith					
Mock Results - L6 - HOY	Shania Highsmith					
Mock Results - U5	Shania Highsmith					
Mock Results - U6	Shania Highsmith	-				

- 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.

Send Individual Assessment Report Message	? 💌
Output Options Pupil InTouch Contact Head Of House Head Of Year Registration Tutor	
	OK Cancel

- 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.

Contact Details	<b>x</b>
The following recipients do not have a primary email address and so cannot receive individual assessment reports.	
Mrs Pacifica Magnan	
Ok	

 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.

Send Individ	iual Assessment Report Message 📀 🔗	<b>(3)</b>
Send	Send & Log	
То	Linked Adults of Caris Anderton	
Subject:	<preferredname>. <yeargroup>. <reggroup></reggroup></yeargroup></preferredname>	
Attached:	IndividualReport.pdf	
т	otal Message Size: 56KB of 4MB. Maximum message size is 4MB.	
Message:	$\begin{array}{ c c c c c c c c c c c c c c c c c c c$	
	Please find attached your Assessment Report.	

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.

#### 07/ Managing School Messages

1. Select Focus | School | Arrange Cover to display the Cover Diary browser.

懒 Cover Diary									
🛍 Search 🖾 Op	en 📥 Print 🛛 🐺	Browse 🖶 Next 🕤	Previous					🔄 Links 🔻 😨 Help	💥 Close
Academic Year	2012/2013	✓ Week Begin	ning 22 Oct 2	012 • 🥥 🔛 Weeks	1 💌	Show only TT day	/s 🗹 Tiers	<any> •</any>	
Date	Day	TimeTable Day	Absent staff	Activities requiring attention/cover	(Hours)	Supply Staff Booked	(Hours)		
22/10/2012	Monday	Mon	2	0	0.00	0	0.00		
23/10/2012	Tuesday	Tue	1	0	0.00	2	13.30		
24/10/2012	Wednesday	Wed	0	0	0.00	0	0.00		
25/10/2012	Thursday	Thu	1	0	0.00	0	0.00		
26/10/2012	Friday	Fri	0	0	0.00	0	0.00		

- 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.

SIMS Contact Det	ails 🔹 💽
The following method availa	recipients do not have the default communication ble.
Staff Code	Staff Name
1RC	Cooke, Rachel
	OK Cancel

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.

SIMS	Cove	er Slip Message					? 💌
C	over	Staff					
		Staff Code	Staff Name	Internal Messaging	Email	SMS	
	V	\$CKZ	\$Kent, Clark		V		
		1RC	Cooke, Rachel				
	V	1DM	Metcalfe, Dave		V		
	Sel	ect All Des	elect All				
						ОК	Cancel
							.H.

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**).
- 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.

SIMS Criteria for Free Sch	ool Meal Expiry Letter	×
Date Range		
Start Date	13/12/2012 🛃 🔍	
End Date	12/01/2013	
	Continue	
		_

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.

SIMS Run an RTF Based Letter	? 💌
Layout Options	
Use a predefined layout     Default T     Output raw XML	emplate 🔹
Output Options	
Open with associated application	
Output to a file	
<ul> <li>Send by InTouch</li> <li>Pupil</li> <li>InTouch Contact</li> <li>Head Of House</li> <li>Head Of Year</li> <li>Registration Tutor</li> </ul>	
	OK Cancel

- 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.

Contact Details	×
<b>\$</b>	
The following recipients do not have a primary email address and so c receive dinner money letters.	annot
Mrs Kylie Channing	
Mr Andrea DiGiagomo	
Mrs Pierina DiGiagomo	
Miss Lisa Denton	
Mrs Shabbana Malik	
Mrs Marianne Evans	
Mr Simon Evans	
	Ok

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.

Send Dinner	· Money Letter Message 📀 🛃 🕄
Send	Send & Log
То	📑 Linked Adults of Kate Tate 📑 Linked Adults of Isha Hussain 📑 Linked Adults of Giovanna Digiagamo 📑 Linked Adults of Alvssa Stone
Subject:	<preferredname>. <yeargroup>. <reggroup></reggroup></yeargroup></preferredname>
Attached:	DinnerMoneyLetter.rtf
т	otal Message Size: 758 Bytes of 4MB. Maximum message size is 4MB.
Message:	Arial $\mathbf{v}$ 16 $\mathbf{v}$ $\mathbf{B}$ $\mathbf{I}$ $\mathbf{U}$ $  \equiv \equiv   \equiv \equiv   \mathscr{P}   \mathbf{Z} \mathbf{v} $
	Please find attached a < <u>DinnerMoneyLetterType</u> > letter for < <u>PreferredForename</u> >.

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



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.

SIMS Criteria for Debtor Letter	? 💌
Group Type and Groups	Â
Group Type	Classes 🗸
Classes	Description
	<pre>✓ <none> E ✓ PM ✓ AM ✓ ELM ✓ PINE ✓ ASH ▼</none></pre>
Level of Debt	
Level of Debt Over	0.00
Level of Debt To	· · · · · · · · · · · · · · · · · · ·
•	4 III
	Continue Cancel

- 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.

SIMS Run an RTF Based Letter	? 💌
Layout Options	
Our Use a predefined layout Department of the second se	fault Template 👻
Output raw XML	
Output Options	
Open with associated application	tion
Output to a file	
Send by InTouch	
Pupil	
Head Of House	
Head Of Year	
Registration Tutor	
	OK Cancel

- 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.

The following recipients do not have a primary email address and so cannot receive dinner money letters.	
Mrs Kylie Channing	
Mr Andrea DiGiagomo	
Mrs Pierina DiGiagomo	
Miss Lisa Denton	
Mrs Shabbana Malik	
Mrs Marianne Evans	
Mr Simon Evans	
Ok	

 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.

Send Dinner	Money Letter Message 📀 🧬 🕄
Send	Send & Log
To	📑 Linked Adults of Kate Tate 📑 Linked Adults of Isha Hussain 📑 Linked Adults of Giovanna Digiagamo 📑 Linked Adults of Alyssa Stone
Subject:	<preferredname>. <yeargroup>. <reggroup></reggroup></yeargroup></preferredname>
Attached:	DinnerMoneyLetter.tf
То	stal Message Size: 758 Bytes of 4MB. Maximum message size is 4MB.
Message:	Arial $\mathbf{v}$ 16 $\mathbf{v}$ $\mathbf{v}$   B $I$ U   $\Xi$ $\Xi$   $\mathbf{z}$   $\mathbf{z}$   $\mathbf{z}$ $\mathbf{v}$   $\mathbf{z}$ $\mathbf{v}$
	Please find attached a < <u>DinnerMoneyLetterType</u> > letter for < <u>PreferredForename</u> >.

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



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.

Group Type Classes  Classes Cl	Group Type and Groups	-
Classes Description Classes Classes Chone> PM AM P ELM PINE ASH Check All Uncheck All	Group Type	Classes 👻
V <none> V PM V AM V ELM V PINE V ASH Check All Uncheck All</none>	Classes	Description
V PM V AM V ELM V PINE V ASH Check All Uncheck All Uncheck All		▼ <none> E</none>
AM ELM ELM PINE ASH Check All Uncheck All		PM
Level of Credit		AM
PINE     ASH     Check All     Uncheck All		ELM ELM
Level of Credit		M PINE
Check All Uncheck All		ASH V
Level of Credit 0.00		Check All Uncheck All
0.0	Level of Credit	
		0.00
• • • • • • • • • • • • • • • • • • •		
4		
	•	4 III

- 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.
- 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.

SIMS Run an RTF Based Letter	? 💌
Layout Options	
Ose a predefined layout	Default Template 👻
Output raw XML	
Output Options	
Open with associated appl	ication
Output to a file	
Send by InTouch	
Pupil	
In Louch Contact	
Head Of Year	
Registration Tutor	
	OK Cancel

- 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.

SIMS Contact Details	<b>X</b>
<b>A</b>	
The following recipients do not have a primary receive dinner money letters.	email address and so cannot
Mrs Kylie Channing	
Mr Andrea DiGiagomo	
Mrs Pierina DiGiagomo	
Miss Lisa Denton	
Mrs Shabbana Malik	
Mrs Marianne Evans	
Mr Simon Evans	$\checkmark$
	Ok
	UN

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.

Send Dinner	· Money Letter Message 🥏 🖉 🕄
Send	Send & Log
To	📑 Linked Adults of Kate Tate 📑 Linked Adults of Isha Hussain 📑 Linked Adults of Giovanna Digiagamo 📑 Linked Adults of Alvssa Stone
Subject:	<preferredname>. <yeargroup>. <reggroup></reggroup></yeargroup></preferredname>
Attached:	DinnerMoneyLetter.rtf
т	otal Message Size: 758 Bytes of 4MB. Maximum message size is 4MB.
Message:	$\begin{array}{c c c c c c c c c c c c c c c c c c c $
	Please find attached a < <u>DinnerMoneyLetterType</u> > letter for < <u>PreferredForename</u> >.

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.

SIMS Criteria for Summary	Statement Letter
Date Range	
Start Date	01/09/2012
End Date	14/12/2012
Group Type and Group	6
Group Type	Classes 👻
Classes	Description     ▲       ✓ <none>     ⊨       ✓ PM     ✓       ✓ AM     ✓       ✓ ELM     ✓       ✓ PINE     ✓       ✓ ASH     ▼</none>
	Continue Cancel

- 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.
- 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.

- ? × SIMS Run an RTF Based Letter Layout Ontions Output Use a predefined layout Default Template • Output raw XML Output Options Open with associated application Output to a file Send by InTouch Pupil ✓ InTouch Contact Head Of House Head Of Year Registration Tutor OK Cancel
- 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.

Contact Details	x
(Sec. 1)	
The following recipients do not have a primary email address and so cannot receive dinner money letters.	
Mrs Kylie Channing	
Mr Andrea DiGiagomo	
Mrs Pierina DiGiagomo	
Miss Lisa Denton	
Mrs Shabbana Malik	
Mrs Marianne Evans	
Mr Simon Evans	
Ok	

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.

5. Click the **Continue** button to display the **Run an RTF Based Letter** dialog.

9. Once the letters are created, the Send Dinner Money Letter Message page is displayed. The letter is attached to the message automatically.

Send Dinner	Money Letter Message 🥏 🚰 🕄
Send	Send & Log
То	📑 Linked Adults of Kate Tate 📑 Linked Adults of Isha Hussain 📑 Linked Adults of Giovanna Digiagamo 📑 Linked Adults of Alyssa Stone
Subject:	<preferredname>. <yeargroup>. <reggroup></reggroup></yeargroup></preferredname>
Attached:	DinnerMoneyLetter.tf
Τα	stal Message Size: 758 Bytes of 4MB. Maximum message size is 4MB.
Message:	Arial $\mathbf{v}$ 16 $\mathbf{v}$ $\mathbf{v}$ $\mathbf{B}$ $\mathbf{I}$ $\mathbf{U}$ $\mathbf{E}$ $\mathbf{E}$ $\mathbf{E}$ $\mathbf{E}$ $\mathbf{E}$ $\mathbf{V}$ $\mathbf{E}$ $\mathbf{v}$
	Please find attached a < <u>DinnerMoneyLetterType</u> > letter for < <u>PreferredForename</u> >.

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.

)ate Range		
Start Date	14/12/2012	🛃 🔍
End Date	21/12/2012	<b>S Q</b>
Group Type and Group	6	
Group Type	Classes	•
Classes	Description	A
	None>	=
	IV PM	
	ELM	
	PINE	_
	Check All Unched	sk All
	Continue	Cancel

- 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.
- 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.

sims Run an RTF Based Letter	? 💌
Layout Options     Use a predefined layout     Output raw XML	Default Template 👻
Output Options	
Open with associated app	lication
Output to a file	
<ul> <li>● Send by InTouch</li> <li>□ Pupil</li> <li>☑ InTouch Contact</li> <li>□ Head Of House</li> <li>□ Head Of Year</li> <li>□ Registration Tutor</li> </ul>	
	OK Cancel

- 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.

SIMS Contact Details	
<b>\$</b>	
The following recipients do not have a primary	email address and so cannot
receive dinner money letters.	
Mrs Kylie Channing	
Mr Andrea DiGiagomo	
Mrs Pierina DiGiagomo	
Miss Lisa Denton	
Mrs Shabbana Malik	
Mrs Marianne Evans	
Mr Simon Evans	V
	Ok
	UK UK

 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.

Send Dinner	Money Letter Message 📀 🥵 🕄		
Send	Send & Log		
To	📑 Linked Adults of Kate Tate 📑 Linked Adults of Isha Hussain 📑 Linked Adults of Giovanna Digiagamo 📑 Linked Adults of Alyssa Stone		
Subject:	<preferredname>. <yeargroup>. <reggroup></reggroup></yeargroup></preferredname>		
Attached:	DinnerMoneyLetter.rtf		
Total Message Size: 758 Bytes of 4MB. Maximum message size is 4MB.			
Message:	$\begin{array}{ c c c c c c c c c c c c c c c c c c c$		
	Please find attached a < <u>DinnerMoneyLetterType</u> > letter for < <u>PreferredForename</u> >.		

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	173
Setting Default Communication Methods	176
Enabling the Matching of an Incoming SMS Message with the	
Original Message	179

# **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 <u>from anywhere in SIMS</u>, 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.

08/ Setting Up Emergency Alert Notifications, the Default Communication Method and SMS Matching

1. Select **Tools | Setups | Emergency Alert** to display the **Emergency Alert Configuration** page.

Emergency Alert Configuration Save 50 Undo Emergency Settings 2 Selected Staff	2 Message			<sub> (2)</sub> Help	🚰 Unpin	💥 Clo:	se
1 General Settings     Use Emergency Alert	J Message						^
2 Selected Staff Name	Internal Messaging	Email	SMS		Add	ove	
3 Message Teacher < Class Teacher Nam	e> , in Room <class na<="" room="" td=""><td>ame&gt; with <class nan<="" td=""><td>ne&gt;, needs urgent assist</td><td>ancel</td><td></td><td></td><td>~</td></class></td></class>	ame> with <class nan<="" td=""><td>ne&gt;, needs urgent assist</td><td>ancel</td><td></td><td></td><td>~</td></class>	ne>, needs urgent assist	ancel			~

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 <u>only</u> 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.

SIMS Find Recipients						? 🔀
💖 Find Recipients						
🖬 Search 👻 🚍 Print 📔						
Surname	Forename		B	ole <any></any>		*
Staff Code						
Name		Staff Code				
					OK	Cancel
						:

- 4. Enter the intended recipient's **Surname**, **Forename** and/or **Staff Code**.
- 5. Select their staff Role from the drop-down list.
- 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.

2 Selected Staff							
	[	Name	Internal Messaging	Email	SMS		🖶 Add
		Asher, Mrs Dawn	V				

- 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 <u>only</u>. 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.

General					
Role	Internal Messaging	Email	Mobile		
Student		۲	0		
Applicant		۲	0		
Staff	۲	0	0		
Parental Contact		۲	0		
Agent		۲	0		
Governor		۲	0		
Other School		۲			
Other		۲	0		

2. Click the **General** hyperlink to display the **General** panel.

3. For each staff **Role**, select the radio button that indicates the default method of communication you wish to use.

#### 08/ Setting Up Emergency Alert Notifications, the Default Communication Method and SMS Matching

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.

<u>2</u> 1	Behaviour Notification				
	Role	Internal Messaging	Email	Mobile	
	InTouch Contact		V		
	Registration Tutor				
	Head of House				
	Head of Year				
<u>3</u>	Exam and Student Timetable				
	Role	Internal Messaging	Email	Mobile	
	Student		V		
	InTouch Contact				
	Registration Tutor				
	Head of House				
	Head of Year				
<u>4</u>	Unexplained Absence				
	Role	Internal Messaging	Email	Mobile	
	Student				
	InTouch Contact		V		
	Registration Tutor				
	Head of House				
	Head of Year				
<u>5</u>	Late Notification				
	Role	Internal Messaging	Email	Mobile	
	InTouch Contact		$\checkmark$		
	Registration Tutor				
	Head of House				
	Head of Year				
<u>6</u>	Exam Reminder				
	Role	Internal Messaging	Email	Mobile	
	Student		¥		
	InTouch Contact				

<u>7</u> /	Attendance Letter				
[	Role	Internal Messaging	Email	Mobile	
	Student				
	InTouch Contact		$\checkmark$		
	Registration Tutor				
	Head of House				
	Head of Year				
<u>8</u> E	Exam Results				
	Role	Internal Messaging	Email	Mobile	
	Student				
	InTouch Contact				
	Registration Tutor				
	Head of House				
	Head of Year				
<u>9</u> 1	ndividual Assessment Report				
	Role	Internal Messaging	Email	Mobile	
	Student				
	InTouch Contact		V		
	Registration Tutor				
	Head of House				
	Head of Year				
10	Dinner Money Letters				
	Role	Internal Messaging	Email	Mobile	
	Student				
	InTouch Contact		$\checkmark$		
	Registration Tutor				
	Head of House				
	Head of Year				
11	Cover Sline				
			<b>F</b> 1	- ML.9	
	Stoff	Internal Messaging			
l	5.811			¥.	
12	Cumulative Achievement Alerts				
	Role	Internal Messaging	Email	Mobile	
	Student		$\checkmark$		
	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.

08/ Setting Up Emergency Alert Notifications, the Default Communication Method and SMS Matching

# 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 SMS Messaging			
Subscriber ID	0000000	Test Mobile Number	
Authentication Code	000000000000000000000000000000000000000	000000000000000000000000000000000000000	000000000000000000000000000000000000000
Enable SMS Matching			Test

3. Select the **Enable SMS Matching** check box, then click the **Save** button to save the changes.



More Information: Introduction on page 73 08/ Setting Up Emergency Alert Notifications, the Default Communication Method and SMS Matching

# 09 Producing Reports in SIMS InTouch

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## 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).

Ducity School (\$18,452.1)								
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		
0.1.1.1	Contact	07842553029	18/01/2011 12:28:56		Failed, Retrying	user2		

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.

🔤 Criteria for Failed Outbound Messages Report 🛛 😰 🗙						
Date Range Start Date End Date	19/01/2011 💽 🔍 19/01/2011 💽 🔍					
	Continue Cancel					

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.

SIMS Select Cu	ırriculum Diary [	Jate	? 🔀
Diary Dates Academic Date 01/09/201 24/10/201 17/12/201 04/01/201 26/02/201 08/04/201 28/04/201 29/05/201 04/06/201 22/07/201 31/08/201	Year Day Vednesday O Sunday O Saturday O Friday 1 Sunday 1 Sunday 1 Tuesday 1 Friday 1 Sunday 1 Sunday	Academic Year 2010/2011  Description  Start of Academic Year 2010/2011, Star End of Autumn Term part 1 Start of Autumn Term part 2 End of Autumn Term Start of Spring Term part 1 Start of Spring Term part 2 End of Spring Term End of Spring Term End of Summer Term End of Summer Term End of Summer Term part 2 End of Summer Term End of Academic Year 2010/2011	tof A
		OK	Cancel

- 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.

#### 09 | Producing Reports in SIMS InTouch

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; Com	munication Methods: All; Message Types: All; Users: All; Recipients/Senders: All; Students: Disabled				
Summary.					
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 Blacke	r			

1. Select **Reports | InTouch | Messaging Audit** to display the **Criteria for Messaging Audit Report** dialog.

sins Criteria for Messaging Audit Report		
Date Range		
Start Date	01/09/2010	
End Date	19/01/2011	
Report Type	<ul> <li>Summary</li> </ul>	O Detailed
Audit Type	Sent and receive	d messages 💌
Filters		
Communication Methods	All	Edit
Message Types	All	Edit
Users	All	Edit
Recipients/Senders	All	Edit
Students	Disabled	Edit
Continue Cancel		

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.

SIMS Select Currici	ulum Diary D	Date	?×
Diary Dates Academic Year Date 01/09/2010 24/10/2010 30/10/2010 17/12/2011 26/02/2011 26/02/2011 26/02/2011 26/02/2011 29/05/2011 22/07/2011 31/08/2011	Day Wednesday Sunday Saturday Friday Tuesday Sunday Saturday Friday Tuesday Sunday Saturday Friday Wednesday	Academic Year 2010/2011  Description  Start of Academic Year 2010/2011, Start of A End of Autumn Term part 1 Start of Autumn Term part 2 End of Autumn Term part 2 End of Spring Term part 1 Start of Spring Term part 2 End of Spring Term part 2 End of Summer Term part 1 Start of Summer Term part 2 End of Academic Year 2010/2011	
		ОК	Cancel

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.
- 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.

SIMS Communication Methods	?	×
Communication Methods		
Description		
<ul> <li>Email</li> <li>Internal Messaging</li> <li>Push Notification</li> <li>SMS</li> </ul>		
Check All Uncheck All		
ОК	Can	cel

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.

sins Message Types			
Message Types			
Description         Image: General Message         Student Profile Message         Percentage Attendance Message         Unexplained Absence Message         Achievement Award			
Check All Uncheck All OK Cancel			

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.

* <sup>s</sup> Users	? 🛛
Users	
Description	
<ul> <li>✓ ABELLA</li> <li>✓ School</li> <li>✓ user2</li> </ul>	
Check All Uncheck All	
	OK Cancel

 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.

SIMS	Recipients/Senders
R	ecipients/Senders
	Description
	Ad Hoc
	<ul> <li>✓ 07563762201</li> <li>✓ 07842553029</li> <li>✓ cracknell @intouch.capita.co.uk</li> <li>✓ IntouchVM10@intouch.capita.co.uk</li> <li>✓ Parent8@intouch.capita.co.uk</li> </ul>
	Contact
	<ul> <li>✓ Abbot, Mr Jaswinder</li> <li>✓ Abbot, Mrs Rachael</li> <li>✓ Abdelkader, Fachi</li> </ul>
	Check All Uncheck All
	OK Cancel

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.

sims St	udents	2
Stud	lents	
E	nabled	Description Abbey, Jimmy Joseph, Jackie
		Check All Uncheck All
		OK Cancel

- 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.
- 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.

sms Run a Screen Based Report 🛛 ? 🔀		
Layout Options         Use a predefined layout         Supply your own layout         C:\SIMS Report Designs\Report_Layout         Output raw XML		
Output Options  Output to a web browser  Output to a file		
ОК	ancel	

#### 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<sup>®</sup> XL, and formatted to your school's requirements.

sins Run a Screen Based Report	? 🛛
Layout Options	
<ul> <li>Use a predefined layout</li> </ul>	
Supply your own layout	
⊙ Output raw XML	
Output Options	
<ul> <li>Output to a web browser</li> </ul>	
Output to a file     C:\SIMS Report Designs\Report_Layou	ut.xml
ОК	Cancel

#### 09| Producing Reports in SIMS InTouch

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.

sins Run a Screen Based Report		K
Layout Options OUse a predefined layout Supply your own layout Output raw XML	C:\SIMS Report Designs\Report_Layout.xsl	
Output Options <ul> <li>Output to a web browser</li> <li>Output to a file</li> </ul>		
	OK Cancel	)

#### 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.

sins Run a Screen Based Rep	ort 🤶 🔀
Layout Options	
<ul> <li>Use a predefined layout</li> </ul>	Default Layout
🔘 Supply your own layout	
◯ Output raw XML	
Output Options	
Output to a web browser	
<ul> <li>Output to a file</li> </ul>	C:\SIMS Report Designs\Report_Layout.xml
	OK Cancel

3. Click the **OK** button to produce the report.

# **10**/Using the PageOne Connect Web Messaging Portal

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# 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.

Save the contac	ct details expor	t file				? 🗙
Save in:	🚞 Web Portal Co	ontact Details File	*	3 🦻	• 🖭 👏	
My Recent Documents						
Desktop						
My Documents						
My Computer						
	File name:	SIMSContacts			~	Save
My Network	Save as type:	ZIP archives (*.zip)			*	Cancel

- 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 <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.



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

(<u>http://www.pageone.co.uk/login</u>). An alternate (or secondary) login page can be accessed here (<u>https://www.oventus.com/oventus/authenticate</u>).

Enter your allocated **Username** and **Password** and click the **Log In** button to open a secure, authenticated session.

Services	Contact Manager	Tools
		Smart Groups
VVeicome SIMSMASTERZ		II > Contacts
CONTACT MANAGER	PERSONAL DETAILS	Personal
TEMPLATES		
INBOX	*Second Name:	Aaron, Chris
OUTBOX	Role:	
USER MANAGEMENT	CONTACT DETAILS	🚷 Aaron, Jonas
PREFERENCES	Phone:	E
IGN OUT	Primary Parent:	Aaron, Liz
	Parents:	
		Aaron, Sophie
	EXTENDED DETAILS	R Aaron, Tia
	Boarder Status:	
	House:	R Abbey, David
	Registration Group:	
	School:	R Abbey, Jimmy
	School Tier:	
	User:	Abbot, Ben
	Year Group:	
		Abbot, Catherine

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.

Import Cont	tacts		
Browse	The XML file containing the SIMS contacts		
		Import	Cancel

- 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, <u>all</u> 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.

PERSONAL DETAILS	
*First Name:	Chris
*Second Name:	Aaron
Role:	STUDENT
CONTACT DETAILS	
Phone:	447093615474
Primary Parent:	447224631848
Parents:	447596231323
EXTENDED DETAILS	
House:	Boyle
<b>Registration Group:</b>	6CH
School:	Duchy School
School Tier:	Prep
Year Group:	Year 6
	t Import

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.

CONTACT DETAILS		
Phone:	447093615474	
Primary Parent:	447224631848	
Parents:	447596231323	

- **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 <u>all</u> 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.

EXTENDED DETAILS	
House:	Boyle
Registration Group:	6CH
School:	Duchy School
School Tier:	Prep
Year Group:	Year 6

# **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.

Tools				>
Smart Groups	e.			
Contacts				
Corporate			- 1	•
Aaron, Chris		1		Â
Aaron, Jonas				
Aaron, Liz		1	1	
Aaron, Sophie	8			
Aaron, Tia				
Abbey, David				
Abbey, Jimmy		•		
Abbot, Ben			E	
Abbot, Catherine				+
4 Page 1 of 1	1.2	3	ik. 1	•

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.

🔀 Aaron, Liz	
Contacts Own number	Parent(s) Number(s)
Prima	ry Parent act number
Conta	

# 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**.

ioti	Allowance:	10				
-	ounts Created:	2				
	Username :	User Id a	Status	Alpha Tag / MSISDNs	Notes	
	SIMSMASTER2	15502066	Active	2.	Note for SIMSMASTER2	/
	sims2child1	57502205	Activo	1	Note for sims2child1	
	sims2child2	57502206	Activo		Note for sims2child2	1

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 <b>User Id</b> beginning 1nnnnnn. User accounts have a <b>User Id</b> beginning 5xxxxxxx.
Status	This is set to either <b>Active</b> or <b>Suspended</b> . To suspend an account (to prevent it from sending messages), click the <b>Active</b> button and select <b>Suspended</b> .
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.

The following account information is also displayed:

# Other User Account Options

Add New User Account(s) – enables the creation of new user accounts by specifying a Username and Password.

SMI	Credita User Acc	sonts	Log or
Usi	er Accounts	Add New User Accouts	
Tet:	al Alkowance counts Critited	How many accounts would you like to set up? * Single O Multiple	
	Username :	Username	
	SMSMASTER2		1
	sims2ch4d1	Required	/
	sims2ch4d2	Password	1
		Required Confirm Password	10 25 50 100
14	dd New User Account	Required	
		Submit	Cancel

**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**.

59.8	S Credita User Acco	sunts -	Lignat
Us	er Accounts	Change Password	
Tet Act	al Allowance counts Created	Password	
	Username :	Required Confirm Password	
	SMSMASTER2		1
	save2ch4d1	Required	/
	sims2child2	Submit	
		L	10 25 50 100
	dd New User Accounty	Change Pastword	

# **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.

Services	Compose Message				Tools	
Walcome sime2abild1					Smart Groups	5
weicome simszemild i		447950055510			Contacts	
COMPOSE	From:	447800055519			Personal	
SMS	To:	Recipients	۲	:		
	Mode:	Text     Text to speech			Aaron, Chris	in in i
NBOX	Delivery Time:	Defaults to current time			Aaron Jonas	
UTBOX					L Marony sonas	
REFERENCES	Message:	*No template selected			Aaron, Liz	
GN OUT		Please type your message here				
					Aaron, Sophie	•
					🔀 Aaron, Tia	
		0 Characters	1 SMS Part			
					Abbey, David	
			Reset	Send	Abbey Jimmy	
	Quick View			~		
	>> 447595271836	» TEST	[14:24:48]	• 🛶	Abbot, Ben	
	>> 447595271836	>> Testing MSISDN	[14:21:34]	• •		
					Abbot, Catherin	ne ia
					Abbot, Christop	mer

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.

Recipient selection Mode		
Please choose the selection mode		
۲	All recipients	
0	Recipients by role	
0	Recipients by role and group	
Reset		Next

- Selecting All recipients sends a message to <u>all</u> 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 <u>all</u> of the contacts registered against the selected roles. In the following example, Primary Parent and Student are selected.

Select Recipient E	By Roles		
Select the roles of the	e recipients you wish to message.		
	Palas		
	Roles		
	Agent Employee Parent Primary Parent Student		
Reset		Previous	Next

 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.

A = = = b	Englas	Devent	Duine and Descent	Chudant		
Agent	Employ	/ee Parent	Primary Parent	Student		
Groups						
1	House	Select 🗸				
Registration	Group	Select 🗸				
5	School	Select 🗸				
Boarder	Status	Select -				
Year	Group	Select -				
Schoo	ol Tier	Select 🕶				

It is possible to select all groups (**Check All**), individual groups or a selection of groups.

Select the role an	id groups that the recipients	must belong.		
	Roles			
	Agent Employ	yee Parent Prima	ry Parent Student	
	Groups			
	House	Select -		
	Registration Group School	<ul><li>✓ Check All</li><li>✗ Uncheck All</li></ul>		
	Boarder Status	Boyle Curie		
	Year Group School Tier	Hooke Newton		

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#### 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).

Fext Message			
Please enter the message you	wish to send.		
Recipients:	All recipients which have the role 'Primary Parent' or 'Student' and in groups		
		.::	
From:	447860055519	•	
Message:	*No template selected	•	
	This is the message that I want to send.		
	40 Characters. 1 SMS Part		
Reset		Previous	Next

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.

lease review your message and eith	er press 'Send' or 'Reset' to finish.		
Recipients:	All recipients which have the role 'Primary Parent' or 'Student' and in groups		
	.::		
Members	1053 matching phone entries		
From:	447860055519		
Message:	This is the message that I want to send.		
	40 Characters, 1 SMS Parts		
Reset		Previous	Ser

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 (<u>http://www.pageone.co.uk/sms-message-formatting-and-charging</u>).

#### 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 (;).

Prom;	447860055478			
To:	07777000001; 07777000002		۲	
Mode:	Text      Text to speech			
elivery Time:	Defaults to current time			-
Message:	"No template selected			
	Please not due to inclement weather we expect the school to be o	Sosed tomorrow.		
	Please not due to inclement weather we expect the school to be o	Sosed tomorrow.		
	Please not due to inclement weather we expect the school to be of 2 Addresses, 79 Characters, 1 SMS Par	fosed tomorrow.		
	Please not due to inclement weather we expect the school to be o 2 Addresses, 79 Characters, 1 SMS Par	Sosed tomorrow. It Reset		Send

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.

Find Template

- 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

implate	
	Find Template
Template Name : Sample Template	
Designer	
This is a sample template that includes a <irput></irput> field as well as a <time></time> and <data></data> input fields. You can see the temp button	plate message by selecting the Preview Template
- Local	

4. Click the **Preview Template** button to view the template message.



Preview Template button

		Find Template
Preview		
This is a sample template that includes a can see the template message by selecting the Preview Template button	field as well as a 00 ¥ ; 00 ¥ and	input fields. You

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5. Close the preview view and click the **Save** button.

		Find Template
Title	Message	
Another Template	This is another template message	adit delet
Sample Template	This is a sample template that includes a <irput></irput> field as well as a <time></time> and <date></date> input fields. template message by selecting the Preview Template button	You can see the stdit delete

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.



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 User Accounts	Log out
SMS Credits	
Remaining Balance: 4996	
SMS Low Credit Alert	
Status: Enabled	
Threshold Limit	Email Address
200	youmame@yourschool.co.uk
Modey	Disable Alerts
Top-up SMS Credits	
Top-up block size	Top-up block price
Select a block size	
Your Reference (Max. 25 characters)	Order Confirmation Email Address
Enter your order reference here (Optional)	yourname@yourschool.co.uk
Order SMS Credits	
View SMS Candits Order History	

#### **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.

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# 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.
- In the Links panel on the right-hand side of the page, click the Communication Log hyperlink to display the Communication Log browser.

늇 Commu New 🎽	unication Log: Gre Search 🔁 Open	<b>metta Abbey</b> 💥 Delete 📥 Print 🏼 🐺	Browse	Next  Previou	s				🖉 Links 🔻	❷Help X Close
Period	This Year	<ul> <li>Context</li> </ul>	Behaviou	r Incident or Points	•	👌 Send Me	ssage			
Direction	From / To	Date		Туре	Context		Follow Up	Notes		Importance
Sent	Louise Abbey	30/04/201	3 10:38	Email (InTouch)	Behaviour Incid	ent or Poi		Subject: Grenetta Abbey, Year 8		High

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.

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5. Highlight the required communication then click the **Open** button to display its details on the **Communication Details** page.

<u>1</u> Basic Details					۲
Communicatee	Louise Abbey Anita Abell		Importance	High 💌	Niew
Туре	Email (InTouch)	🦱	Direction	Sent 👻	
Date	05/03/2018		Time	10:16:35	
Log Confidentiality	Confidential 🗸		Context	Behaviour Incident or Points	•
About	Name		Role		New
	Abbot, Aaron		Student, Appli	ca	🗇 Open
					X Delete
2 Summary Notes					۲
Subject: Grenetta Ab This is to inform you	bey, Year 8, 8F of Grenetta's poor behaviour. Plea	se contact	the school.		
This email and any a	ttachment to it are confidential. Un	nless you a	re the intended	recipient, you may not use, copy (	or disclose either
<u>3</u> Follow Up					۲
☑ Required on	19/03/2018	Creat	e		

- 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.

Setup Message Options	
💾 Save 🛛 🏐 Undo 📥 Print	
1 Options for high priority messages	
<u>1</u> Options for high priority messages	
Display an alert when a new message is received	
The pop-up alert will be displayed for	30 seconds
Play a sound alarm	

- 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 <u>received</u> 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 <u>not</u> 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.
- 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.
- 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).

🚸 Manage Messages 👬 Search 🗁 Open 🚔 Print 🚺	Browse - Next Previous				😨 Help 💥 Close
Sumame: Staff, Code: Gender: Status:	b (Any> Staff, all Current	Forename: Previous Name: Title: Tier:	<ar <ar< td=""><td>φ&gt; γ&gt;</td><td>v</td></ar<></ar 	φ> γ>	v
Name Batchley, Andrea Blacker, Adrian Brown, Paul Simon Burrows, Katie Burton, Fiona Burton, Abigail	Previous Name	Title Mr Mr Mr Miss Miss Mrs	Gender F M M F F F F	Staff Code AB JB PB KB FB ABN	Total Message(s) 0 3 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0

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4. Highlight the user whose messages you wish to tidy then click the **Open** button to display the **Manage Messages** page.

Manage Messages - Mr Adrian Blacker						
📥 Print					🕲 Help 🛃 Unpin 💥 I	Close
1 Messages 2 Deleted Messages Log						
<u>1</u> Messages						^
Sender	Subject	Sent Date	Read	Message Type	💥 Delete	
🔲 🚟 Mr Adrian Blacker	Bullying	06-07-2011 12:41	Yes	General Message	Select All	
🔲 🚟 Mr Adrian Blacker	Inadequate Work in Class	12-04-2011 11:19	Yes	General Message	Sec. December 1	
🔲 🚟 Mr Adrian Blacker	Persistent Lateness to School	12-04-2011 11:01	Yes	General Message	N Deselection	-
						×

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<sup>®</sup> **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.

SIMS . ne	et 🛛 🛛
2	You are about to permanently delete 1 message(s). Do you wish to continue?
	Yes No

If you have selected to delete one or more messages, including at least one <u>unread</u> message, the following message is displayed.

SIMS . ne	et 🛛 🕅
2	You are about to permanently delete 1 message(s), of which 1 message(s) have not been read. Do you wish to continue?
	Yes No

7. Click the **Yes** button to delete the selected message(s). The deleted message(s) are displayed in the **Deleted Messages Log** panel.

om Date 01/09/20	9 11 💽 To Date [	05/04/2012			
) eleted By 1r Alan Mariner	Sender Mr Adrian Blacker	Subject RE: Inadequate Work in Class	Sent Date 09-12-2010 10:07	Deleted On 05-04-2012 12:11	🔁 Ð E>

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<sup>®</sup> **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.

SIMS . n	et 🛛 🔀
2	Once the data has been exported, the Audit log will be cleared. Do you wish to proceed?
	Yes No

- 10. Click the Yes button to display the standard Windows<sup>®</sup> 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.

Messages	То	Subject	Queued	Туре	A	L.	Status	Copen Copen
	InTouch Contact(s)	test123131231	16/09/2011 11:46	General Message			Queued	💥 Delete

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.

🔤 Dela	yed Sending of	f Message	es	<b>—</b>
Please	specify the dat	e/time to	send the me	ssage(s).
Date:	05/03/2015	15	Time: 10:0	0 🗸
		×	ОК	💥 Cancel

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.

Failed	×
The message could not be rescheduled because it was already sent.	
	Ok

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