

### 7.180 Independent Edition - version 1.0

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## Welcome to the SIMS 2018 Spring Release

Please read these notes carefully before installing or upgrading your software. Do not attempt any installation or upgrade without first making a fully restorable backup of your SIMS system. For instructions on how to do this, please go to the SIMS backup section of our website (<http://www.capita-sims.co.uk/backupsims>).

We publish highlights of the changes and benefits of each release on our blog (<http://www.capita-independent.co.uk/releaseblog>). The blog is available shortly after the release date.

Capita SIMS has made this release note available in PDF and Word formats. To take full advantage of the functionality available in this release note (e.g. links to handbooks and video tutorials), you must use the PDF version. Capita SIMS cannot be held responsible for any changes, errors or omissions resulting from subsequent editing of the supplied document.

### Important Information – please read before upgrading

If you are performing a SIMS upgrade spanning more than one release, it is essential that you read the release note associated with each version.

### Upgrading using SOLUS

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

For instructions on carrying out an upgrade with **SOLUS3**, please refer to the *SOLUS3 for Schools* or the *SOLUS3 for Local Authorities* handbook.

### Support for SQL Server

SIMS, FMS, Discover, SLG, Partnership Xchange, SOLUS and InTouch run on SQL Server 2012, SQL Server 2014 and SQL Server 2016. If you are running these products on SQL Server 2016, you are strongly advised to run SQL Server 2016 in 2012 compatibility mode. For more information on support for SQL Server and Windows environments, please refer to the *SIMS Technical Roadmap* on My Account (<https://myaccount.capita-cs.co.uk>).

### SQL 2014 and SQL 2016 Migration

We support SIMS, FMS, Discover, SLG, Partnership Xchange, SOLUS and InTouch on SQL 2014 and SQL 2016. If you are running these products on SQL Server 2016, you are strongly advised to run SQL Server 2016 in 2012 compatibility mode.

To facilitate server migration, SQL Migration Tools are available for both platforms.

Please note:

- You must be running the SIMS 2014 Autumn Release or later before running the SQL 2014 Migration Tool.
- You must be running the SIMS 2017 Spring Release or later before running the SQL 2016 Migration Tool.

The Migration Tools assist with the migration of the SQL databases for SIMS, FMS and Discover.

- The SQL 2014 Migration Tool enables you to install a SQL Server 2014 Express Edition Instance and migrate the SIMS, FMS and Discover databases to the new database server.
- Currently, we are unable to incorporate an installer for a SQL Server 2016 Express Edition into the SQL 2016 Migration Tool. If you intend to migrate to SQL 2016, you should download SQL Server 2016 Express Edition (<https://www.microsoft.com/en-us/sql-server/sql-server-downloads-free-trial>), install this onto your new database server and create a new Instance. Once installed, you should use the SQL 2016 Migration Tool to migrate the SIMS, FMS and Discover databases to the new database server.

Before migration, you are strongly advised to read the appropriate mini guide:

- *Migrating SIMS, FMS and Discover to SQL 2014* mini guide; or
- *Migrating SIMS, FMS and Discover to SQL 2016* mini guide.

These mini guides will be available from My Account (<https://myaccount.capita-cs.co.uk>) on product release. They are also included as part of the Migration Tools.

For information on obtaining the Migration Tools, please contact your Local Support Team.

If you use both SIMS and FMS, both systems must be running on the same version of SQL Server, i.e. SQL Server 2012, SQL Server 2014 or SQL Server 2016.

For more information on support for SQL Server, please refer to the *SIMS Technical Roadmap*, which is available from My Account (<https://myaccount.capita-cs.co.uk>).

### General

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

## Important Information for Windows 8 and Windows Server 2012 Users

If you are running SIMS on a Windows 8 or Windows Server 2012 workstation, you may encounter difficulties when attempting to open PDF files in SIMS. This is caused by Windows Reader being the default program used to open PDF files.

To resolve this issue, you must first ensure that Adobe Reader 10 or later is installed.

Next, you will need to associate Adobe Reader with all PDF files. From the Taskbar, click **File Explorer**, click **Computer** in the panel on the left-hand side of the page then from the Menu Bar, select **Computer | Open Control Panel**. Click **Programs | Default Programs | Associate a file type or protocol with a program**. In the **Extensions** list, scroll down to and click the **.pdf** item then click the **Change program** button. Click **Adobe Reader** then click the **Close** button.

## Backing up SIMS and FMS

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

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

## Important Information Regarding the Upgrade of SIMS and Discover

**IMPORTANT NOTE:** You must upgrade to the SIMS 2018 Spring Release before upgrading Discover. If you upgrade Discover before upgrading SIMS, data will not be transferred between the SIMS and Discover databases until SIMS has been upgraded.

### Auto-Deployment of SIMS and Discover

If SOLUS3 auto-deployment is enabled for Discover, we recommend that the settings for Discover auto-deployment are set to start later than the SIMS auto-deployment start time plus the timeout.

The screenshot shows the SOLUS3 Settings interface. The 'Updates' tab is selected, showing the following settings:

- Check updates every: 10 minutes
- Task time out: 30 minutes
- Rollback on failure:
- Auto download:  Between 13:22 and 15:23

The 'AGENTS' section shows:

- Concurrent downloads: 5
- Auto download:  Between 13:22 and 15:23

The 'AUTO DEPLOYMENTS' section shows a table of deployment schedules for various products:

Products	Between	and	Mon	Tue	Wed	Thu	Fri	Sat	Sun
<input checked="" type="checkbox"/> FMS	11:00	23:00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> SIMS	11:00	23:00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> SIMS Discover	13:00	23:00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> SOLUS	11:00	23:00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If the times are not set like this, and the Discover deployment starts before the SIMS deployment, then the data transfer between SIMS and Discover will not work until the SIMS upgrade is completed.

## Important Information Regarding SIMS Documentation

The SIMS [Documentation Centre](#) is accessed by clicking the [Documentation](#) button on the SIMS [Home Page](#). The principal benefit of the SIMS [Documentation Centre](#) is that resources for SIMS, FMS and Discover can all be accessed from a central repository.

It is possible to search for user documentation by output type (handbook, tutorial, QRS, etc.) and then by functional area. It is also possible to search by role (e.g. Teacher, Administrator, Returns Manager, etc.).

A range of Frequently Asked Questions guides can be accessed from the [FAQs](#) menu. The [Troubleshooting](#) section enables you to investigate any issues you may have when accessing the resources available.

**IMPORTANT NOTE:** You might encounter issues when attempting to open any New Feature videos or Tutorials whereby you are asked to install the required version of Flash Player and/or an on-screen dialog suggests that Online Help content cannot be displayed. For more information, please click the following link (<http://helpx.adobe.com/acrobat/kb/known-issues-acrobat-xi-reader.html>).

These issues can be resolved by downloading the latest version of Flash Player (<https://helpx.adobe.com/flash-player.html>).

A search facility is available in the SIMS, FMS and Discover Documentation Centres. This enables you to locate information across the Documentation Centres or within individual resources (handbooks, release notes, FAQs, etc.). The search facility operates in a similar way to a Google search. To perform a search, enter one or more keywords in the search field (located at the top right-hand side of the Menu Bar) then click the [Search](#) (magnifying glass) button. You can use **\*** and **?** as wildcards. To search for an exact phrase, enclose more than one word in double quotes, e.g. **"debit card"**.

We would welcome any feedback you have on the SIMS [Documentation Centre](#). If you have any comments, please email the SIMS Publications team ([publications@capita.co.uk](mailto:publications@capita.co.uk)).

**IMPORTANT NOTE:** If you are running SIMS on a Windows 8 or Windows Server 2012 workstation, you may encounter difficulties when you first log into SIMS after a SIMS upgrade because the What's New page is displayed automatically and cannot be closed easily. This is caused by Windows Reader being the default program used to open PDF files.

To resolve this issue, you must first ensure that Adobe Reader 10 or later is installed.

Next, you will need to associate Adobe Reader with all PDF files. From the Taskbar, click [File Explorer](#), click [Computer](#) in the panel on the left-hand side of the page then from the Menu Bar, select [Computer | Open Control Panel](#). Click [Programs | Default Programs | Associate a file type or protocol with a program](#). In the [Extensions](#) list, scroll down to and click the [.pdf](#) item then click the [Change program](#) button. Click [Adobe Reader](#) then click the [Close](#) button.

If you require assistance with this or any other issue you encounter when attempting to access user documentation, please contact the SIMS Publications team ([publications@capita.co.uk](mailto:publications@capita.co.uk)).

User documentation that is accessible via the SIMS [Documentation Centre](#) (by clicking the [Documentation](#) button on the SIMS [Home Page](#)) is hosted on the web. This approach to delivering user documentation offers you the following benefits:

- A reduction in the download time of a SIMS release from SOLUS
- We can provide user documentation post-release, so you will always have access to the most up-to-date, accurate information.

As a result, documentation provided in PDF format is not deployed to the [\SIMS\Documentation](#) folder on your SIMS Server (with the exception of the What's New page, the main [Documentation Centre](#) navigation page and the Getting Started guide).

**NOTE:** If you wish to access the latest user documentation for the SIMS 2018 Spring Release without logging into SIMS, the [Documentation Centre](#) is accessible using a web link (<http://simspublications.com/134679/index.html>).

Help files are delivered to the [\Program Files\SIMS\SIMS .net](#) folder on each SIMS workstation.

**IMPORTANT NOTES:** If Google Chrome is your default Web browser, you must download PDF files instead of opening them in Chrome to ensure that PDF files display correctly. This is achieved by entering [chrome://settings](#) in the Address Bar then pressing **Enter**. Scroll to the bottom of the page and click **Advanced**. In the **Privacy and security** section, click **Content settings**. Scroll towards the bottom of the list, click **PDF documents** and move the **Download PDF files instead of automatically opening them in Chrome** slider to the on position.

If you experience a problem when attempting to open a page in the **Documentation Centre**, please contact your System Administrator who can enable access to [www.simspublications.com](#).

Advice is provided if you enter [simspublications.com](#) in the Address Bar of your Web browser. The **Documentation Centre** location changes with each release, indicated by a six-digit identifier. To ensure that you access the **Documentation Centre** relating to the version of SIMS installed at your establishment, you are strongly advised to access it from the SIMS **Home Page** (via **Focus | Home Page**), by clicking the **Documentation** button.

If you require assistance with this or any other issue you encounter when attempting to access user documentation, please contact the SIMS Publications team ([publications@capita.co.uk](mailto:publications@capita.co.uk)).

We provide SIMS Documentation Centres and What's New pages for specific school phases, so that user documentation relevant only to your school phase is provided.

We would welcome any feedback you have on the school phase-specific SIMS Documentation Centres and What's New pages. If you have any comments, please email the SIMS Publications team ([publications@capita.co.uk](mailto:publications@capita.co.uk)).

#### Update of the SIMS Documentation Centre in line with the SIMS Software

Some customers have informed us that the SIMS **Documentation Centre** is not being updated in line with the SIMS software; clicking the **Documentation** button on the SIMS **Home Page** following an upgrade displays content from the previous release.

If you encounter this issue, then the part of the SIMS upgrade that deals with the update of the SIMS **Documentation Centre** (**SIMSApplicationSetup.exe**) has failed.

This is caused by the incorrect configuration of the SIMS File Server settings in SOLUS3; it is likely that the File Server has been pointed to the network SIMS drive rather than the local SIMS drive. To resolve this issue, please complete the following steps.

1. In SOLUS3, navigate to **Environment | Targets – Services** tab.
2. Highlight the **SIMS File Server** service and then click the **Edit** button.
3. Ensure that the **Server name** is the name of the server that hosts the mapped SIMS drive.
4. Change the **Installation path** to the true name of the mapped drive (e.g. **D:\Admin Data\SIMS**) - do not use a mapped drive letter.
5. After correcting the **Installation path** setting, re-deploy the upgrade (via **Upgrades | Deployment History | <select the update> - Redeploy** button), choosing only the **SIMS File Server** from the list of available **TARGETS**, and then run the upgrade manually.

#### Where to Find More Information?

##### Via SIMS...

For the software handbook, navigate to the SIMS **Home Page**, click the **Documentation** button to display the **Documentation Centre**, click the **Handbooks** button then click the required handbook title.

##### Via My Account...

Documentation is also available from the My Account website (<https://myaccount.capita-cs.co.uk>).

1. Enter the required text in the **Search** field to display a list of documents that match the search criteria.
2. To refine the search further, click **Documents** and then select the required **Document type**, **File type** and/or **Date** range (click **Show more** to view additional options, if required).

Alternatively, click **SIMS Publications** (located in the **Popular Searches** list) to display a list of all SIMS publications.

The search results are displayed automatically.

## Tips for using the My Account Search Facility

Here are some key tips for using the search facility in My Account. For additional explanations, please refer to the My Account website.

**NOTE:** You no longer need to use + / - / "" when searching.

- Reduce the number of words you enter in the search field and use only key words, e.g. instead of entering **student showing as a contact**, search for the word **contact**.
- Use the **Product Type** filter to refine results further.
- Use the advanced filters located on the left-hand side of the **Search results** page.

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

## Permissions

The permissions spreadsheet, which lists all permissions relating to SIMS 7.180, is available from the [Documentation Centre](#). To access the SIMS [Documentation Centre](#), click the [Documentation](#) button on the SIMS [Home Page](#).

In My Account, select [Knowledge Base](#), [SIMS Publications](#) (located in the [Popular Searches](#) list), enter [7.180 SIMS Permissions Spreadsheet](#) in the [Search for](#) field then click the [Find](#) button. Alternatively, use the search facility on the Home Page to display a list of all [Documents](#) containing the search criteria.

## Version Support for FMS

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

Release	SIMS Version	FMS Version	FMS with Personnel Links/Equipment Register	FMS without Personnel Links/Equipment Register
Spring 2018	7.180	6.180	Supported	Supported
Autumn 2017	7.178	6.178	Supported	Supported
Summer 2017	7.176	6.176	Not supported	Supported
Spring 2017	7.174	6.174	Not supported	Supported

**NOTE:** FMS 6.180 has been tested against SQL Server 2012, 2014 and 2016.

## SLG Compatibility

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

## Supported SIMS Versions with SLG Spring Release

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

- SIMS 2018 Spring Release (SIMS 7.180)
- SIMS 2017 Autumn Release (SIMS 7.178).

**IMPORTANT NOTE:** If you install the SIMS 2018 Spring Release (SIMS 7.180) and continue to run an older release of SLG, this is not guaranteed to work and is therefore not supported.



## Supported SIMS Versions with PX Spring Release

The SIMS PX Agent should be upgraded to the PX 2018 Spring Release immediately after, or in conjunction with, upgrading to the SIMS 2018 Spring Release.

**IMPORTANT NOTE:** If you install the SIMS 2018 Spring Release (SIMS 7.180) and continue to run an older release of the PX Agent, this is not guaranteed to work and is therefore not supported.

## Academic Management

### Fixes

This release includes a fix in the following area:

- Users with the permissions of an Administration Assistant now have access to the **Add Activity** button in Curriculum Assignment by Student (via [Focus | School | Academic Structure | Curriculum Assignment by Student](#)).

## Admissions

### New Features



### Enhancements to the Application Import File (AIF)

[Routines](#) | [Admission](#) | [Import Applications](#)

Concession data and User Defined Fields can now be imported by an Application Import File (AIF).

## Agora

SIMS Agora enables schools to collect parent payments safely and securely. It supports the drive for schools to improve efficiency by reducing costs and streamlining payment collection administration.

For parents, SIMS Agora offers the flexibility to make online payments whenever and wherever they like, 24 hours a day, 7 days a week, safe in the knowledge that SIMS Agora uses the highest level of card security.

SIMS Agora does not form part of the SIMS 2018 Spring Release.

For information on the latest release of Agora, please refer to the Agora release note, which is available from the My Account website (<https://myaccount.capita-cs.co.uk>).

## AMPARK

### New Features

### Enhancements for the SIMS 2018 Spring Release

The Assessment Manager and Performance Analysis Resource Kit (AMPARK) provides a set of resources for use with SIMS Assessment. This kit has been updated for the SIMS 2018 Spring Release.

For more information, please refer to the *Assessment Manager and Performance Analysis Resource Kit* release note, available from the My Account website (<https://myaccount.capita-cs.co.uk>).

## Assessment

### New Features

### Annual Updates to Early Years Foundation Stage Profiles for 2018

**Applicable to schools in England only**

[Routines](#) | [Data In](#) | [Assessment](#) | [Import](#)

The following resources have been updated for 2018 and are available from the **AMPA\England Primary (and Middle Deemed Primary)\Assessment Manager** folder:

- EYFS Baseline Assessment Template CEM 2018.xml
- EYFS Baseline Assessment Template EE 2018.xml
- EYFS Baseline Assessment Template NFER 2018.xml
- EYFS Profile Template 2018.xml
- EYFS Profile Wizard 2018.xml.

## Fixes

This release includes fixes in the following areas:

- When calculating the data in a marksheet, the **Mean Grade** values displayed in the summary rows are now rounded to the nearest whole number rather than rounding up to the next whole number (via [Focus | Assessment | Marksheet Entry](#)).
- For schools in England and Wales, additional Key Stage 4 aspects have been included in **KS4 Assessment Mapping Tool Aspect.xml** for WJEC Level 1/2 Vocational Award in Constructing the Built Environment and NCFE Level 2 Certificate in Food and Cookery (via [Routines | Data In | Assessment | Import](#)).
- For schools in Wales, the **Statements** toolbar is now available in Programme of Study Content Management (via [Focus | Assessment | Programme of Study Management | Managing Content](#)).

## Attendance

### New Features



#### Highest Priority Contact Rank Added to the Registration Certificate Report

[Reports | Attendance | Individual Pupil \(or Student\) Reports | Registration Certificate Report](#)

The **Personal Details** section of the Registration Certificate report now displays the pupil/student's **Highest Priority Contact (Rank)**.

### Fixes

This release includes fixes in the following areas:

- The Pupil (or Student) Analysis By Attendance Code report now displays pupil/student names alphabetically by surname and forename (via [Reports | Attendance | Whole Group Pupil \(or Student\) Reports | Pupil \(or Student\) Analysis By Attendance Code Report](#)).
- Reports now display pupil/student names based on the selected **Display of Names** options (via [Tools | Setups | Attendance Setup | Module Setup](#)).

- As long as the **Start Date** and **End Date** are different, it is now possible to record a **Start Time** that is the same as an **End Time** in Early Years Provisions (via [Tools | Setups | Attendance Setup | Early Years Provisions Setup](#)).

## Course Manager

### New Features



#### Sorting Results in the Select Class Dialog

[Tools | Academic Management | Course Manager | Maintain Course](#)

When adding classes to a course, it is now possible to sort the results displayed in the **Select Class** dialog by clicking any of the column headings.

#### Identification of Selected Class Members in Maintain Courses

[Tools | Academic Management | Course Manager | Maintain Course](#)

After highlighting multiple students in the **Memberships and Results** panel, they are now clearly identifiable by a blue outline.

#### Enhancement to the Find Course Browser

[Tools | Academic Management | Course Manager | Maintain Course](#)

When entering a **Description** in the **Find Course** browser, results are now displayed for all course descriptions that contain the search criteria. Previously, only course details that matched the search criteria exactly were displayed.

#### Provision of Additional Levels

[Tools | Academic Management | Course Manager | Maintain Course](#)

The following levels have been added in Course Manager:

- BTA1 (BTEC Tech Award Level 1)
- BTA12 (BTEC Tech Award Level 1/2)
- PTL3 (Pearson Technical Level 3)
- VRQL2 (VRQ Level 2)



- VRQL3 (VRQ Level 3).

## Cover

### Fixes

This release includes fixes in the following areas:

- Performance enhancements have been introduced when saving a cover assignment (via [Focus | School | Arrange Cover](#)).
- It is now possible to assign staff to cover when the [Half Period Cover Mode](#) check box is selected in Global Settings (via [Tools | Cover | Global Settings](#)).

## Discover

### New Features



#### Amendment to the KS4 Grade Distribution Graph

The [KS4 Grade Distribution](#) graph definition has been amended to display the distribution of new 9-1 GCSE grades for Maths, English Literature and English Language for 2018. This graph definition is available from the [Exams](#) category button on the [Discover Application Bar](#).

## Examinations Organiser

### New Features

#### Adding User-Defined QNs



**Applicable to schools in England only**

[Tools | Examinations | Manage Performance Indicator](#)

It is now possible for schools to set up their own qualifications, which will assist schools in managing iGCSEs.

## Cloning QNs for 2018



**Applicable to schools in England only**

[Tools | Examinations | PI Setup](#)

All QNs used in the previous exams season can now be cloned for use in the forthcoming exams season for 2018.

## New Grade Set Provided for use with New Points Values



**Applicable to schools in England only**

The KS4 and KS5 point values have been updated for schools in England. The new point values will be available on upgrade to the SIMS 2018 Spring Release.

A spreadsheet containing the updated point values called [Gradesets.xlsx](#) will be posted to My Account once the release has shipped.

## New QN Correlation Report for Missing QNs



**Applicable to schools in England only**

[Tools | Examinations | QN Correlation Report](#)

An additional report that enables the identification of missing qualifications for which there are examination entries on the [Manage Performance Indicator Details](#) page has been provided. Running and analysing this report ensures that any missing QNs for which an entry has been made can be entered retrospectively into SIMS.

## Updating Grade Details for Similar QNs



Applicable to schools in England only

[Tools](#) | [Examinations](#) | [Manage Performance Indicator](#)

If you have updated some of the GCSEs qualifications to reflect the new point values and equivalences but now want to update the remaining GCSE qualifications, it is possible to identify a GCSE with the new point values and equivalences and collectively update the grade details for a number of similar qualifications.

## Enhancements to the ISC Exam Analysis Report



[Reports](#) | [Run Report - Focus](#) | [Student](#)

The ISC Exam Analysis report, which facilitates the collation of exam data and upload to the ISC portal, has been updated for 2018 in line with ISC requirements.

### Fixes

This release includes fixes in the following areas:

- Additional grade sets have been provided for **JC 40 /2 Result** and **JC 44 /2 Result**, enabling the import of basedata (in Examinations Organiser via [Focus](#) | [Basedata](#)).
- Additional grade sets have been provided for **AQAA Unassigned**, **BTEC Unassigned**, **BTEC Tech Award Level 1 & 2**, **CAMX Level Two**, **CAMX Award Level 2**, **CAMX Certificate Level 2** and **CAMX Diploma Level 2**, enabling the import of basedata (in Examinations Organiser via [Focus](#) | [Basedata](#)).
- When clicking the **CKD** button in Edit PI, the Calculate Keeping Discounting routine no longer duplicates non-EDI results that are displayed in the **Edit PI Data** grid (in SIMS via [Tools](#) | [Examinations](#) | [Edit PI Data](#)).
- When exporting the Performance Table report to Excel for either the Key Stage 4 or Age 16-18, the number of students displayed now excludes those with the enrolment status of **Guest pupil**, **Subsidiary – Dual Registration** and **Main - Dual Registration** (in SIMS, via [Tools](#) | [Examinations](#) | [PI Reports](#)).

- For schools in Wales, Discount Code RA15 is now available in Examinations Organiser.

## Fees Billing

### Fixes

This release includes fixes in the following areas:

- Performance enhancements have been introduced when creating or amending a Direct Debit schedule (via [Focus](#) | [Fees Billing](#) | [Instalments](#) | [Direct Debit](#)).
- Performance enhancements have been introduced when exporting the Fees Billing Transaction Report to Excel (via [Reports](#) | [Fees Billing](#) | [Transactions](#) | [Transactions List](#)).

## FMS

For information on the new features, enhancements and fixes included in FMS 6.180, please refer to the *FMS 6.180* Release Note.

## InTouch

### New Features



### Changes to the Communication Log when Sending a Message via InTouch

When a school employee sends a message and elects to record its content in the Communication Log, the new **Communicator** field is populated automatically with their name.

### Fixes

This release includes a fix in the following area:

- Exam results can now be sent via SIMS InTouch for the ten most recent exam seasons (via [Tools](#) | [InTouch](#) | [Exam Results Setup](#)).

## Lesson Monitor

### New Features



#### Highest Priority Contact Rank Added to the Registration Certificate Report

[Reports](#) | [Lesson Monitor](#) | [Individual Student Reports](#) | [Registration Certificate Report](#)

The **Personal Details** section of the Registration Certificate report now displays the pupil/student's **Highest Priority Contact (Rank)**.

### Fixes

This release includes fixes in the following areas:

- The Student Analysis By Attendance Code report now displays pupil/student names alphabetically by surname and forename (via [Reports](#) | [Lesson Monitor](#) | [Whole Group Student Reports](#) | [Student Analysis By Attendance Code Report](#)).
- Reports now display pupil/student names based on the selected **Display of Names** options (via [Tools](#) | [Setups](#) | [Attendance Setup](#) | [Module Setup](#)).
- Schools with editable (unlocked) attendance codes can now record user-defined 'attendance not required' codes (via [Focus](#) | [Lesson Monitor](#) | [Take Register](#) or [Edit Marks](#)).
- An error no longer occurs when modifying unexplained absences for a student who also has conflicting marks (via [Focus](#) | [Lesson Monitor](#) | [Deal with Unexplained Absences](#)).
- Attendance not required marks (#) are no longer overwritten if the academic year structure is set up without PM sessions and [Copy Lesson Marks To Session](#) for **PM Session** is selected in Lesson Monitor Setup (via [Focus](#) | [Lesson Monitor](#) | [Take Register](#) or [Edit Marks](#)).

## Options Online

Options Online does not form part of the SIMS 2018 Spring Release.

For information on the latest release of Options Online, please refer to the Options Online Newsfeed notification, which is available from the My Account website (<https://myaccount.capita-cs.co.uk/Notifications/new-feature-options-online/>).

## Personnel

### New Features



#### Bulk Updating the Completed Status of a Training Course

[Tools](#) | [Staff](#) | [Training](#)

The **Completed** status of a training course can now be updated for more than one member of staff at a time.

### Fixes

This release includes a fix in the following area:

- The selection of check boxes in the **Tiers** panel on the staff record are now retained when the **Employment Start Date** is changed or deleted (via [Focus](#) | [Person](#) | [Staff](#)).

## Reporting

### New Features

#### Enhancements to the Reporting Dictionary



[Reports](#) | [Design Report](#)

The **Enrolment Status Changes** sub-report has been added to the reporting dictionary (under [Student](#) | [History](#)).

The **Qualification Type** field has been added to the **Exams** sub-report (under [Student](#)).

The **Address Note** field has been added to the reporting dictionary (under **Student | Family home**).

Name fields (under **Student | Basic Details**) have been split into **Chosen Names** and **Legal Names** groups.

- The following **Chosen Names** can now be added to a report:
  - Surname Initial
  - Forename & Surname Initial.
- The following **Legal Names** can now be added to a report:
  - Initials
  - Legal Surname Initial
  - Initial & Legal Surname
  - Legal Forename & Legal Surname
  - Legal Forename & Legal Surname Initial
  - Legal Surname & Initial.

The **Communicator** field has been added to the reporting dictionary (under **Communication**).

The **School Objective** field in the **Objectives** sub-report has been renamed **School Objective Detail**. The **School Objective Summary** field has been added to the **Objectives** sub-report. These amendments enable the reporting on objectives for members of staff (under **Staff | Objective Details**).

## Update to the Person Data Output



[Routines](#) | [Data Out](#) | [Person Data Output](#)

With the appropriate permissions, it is now possible to generate the Person Data Output for contacts and members of staff. This provides an output of the specified data held within SIMS 7 of a specified **contact** or **member of staff** and can be used in conjunction with other reports and outputs to assist in the completion of SARs (Subject Access Requests).

The following changes have been made to the **Person Data Output** dialog:

- It is now possible to export the file for members of staff in XML format using the **Generate xml Output** button. To avoid confusion, the existing **Generate** button has been renamed **Generate Word Output**.
- The save location of the output is remembered the next time an output is generated.
- The role of the person is now included in the output file name.
- People with multiple roles are displayed as separate rows in the **Matched People** panel, with one row per role.
- The **Date of Birth** column has been added to the **Matched People** panel.

Reports now include:

- a pupil/student's **Enrolment Status** history in the **Registration Details** section of a pupil/student report.
- **Communicator** information in **Communication Details** sections.

The following changes have been made to the **Person Data Output Log** page:

- The **Role** column has been added.
- The audit log can now be exported to Microsoft® Excel by clicking the **Export** button.



## Fields Added to Student List Reports



[Reports](#) | [Student List](#) | [General Student List](#)

[Reports](#) | [Student List](#) | [Class List](#)

[Reports](#) | [Student List](#) | [Registration Group List](#)

The following fields can now be added to a Student List report:

- Standard | Basic Details | Registration Tutor
- Standard | Basic Details | Quick Note
- Standard | Registration Details | Head of House
- Standard | Registration Details | Date of Leaving
- Standard | Family Home | Address Block
- Standard | Family Home | Contact (**now includes contact's email address**)
- Standard | Family Home | Parental Salutation
- Standard | Parental Consent | Parental Consent
- Standard | Additional Information | Telephone Numbers
- Standard | Additional Information | Email Address
- Standard | Medical | Medical Conditions (all)
- Standard | Medical | Medical Notes Summary
- Standard | Ethnic/Cultural | Country of Birth
- Standard | Ethnic/Cultural | Nationality.

## Class Filter Added to the Student Timetable(s) Report



[Reports](#) | [Timetables](#) | [Student Timetable\(s\)](#)

The **Class(es)** filter has been added to the Student Timetable(s) report. This facilitates the selection of students by class when producing individual student timetables.

## Enhancements to the ISC Exam Analysis Report



[Reports](#) | [Run Report - Focus](#) | [Student](#)

The ISC Exam Analysis report, which facilitates the collation of exam data and upload to the ISC portal, has been updated for 2018 in line with ISC requirements.

### Fixes

This release includes fixes in the following areas:

- An error no longer occurs when attempting to run reports with an **Effective Date** other than today (via [Reports](#) | [Run Report](#)).
- Errant rows are no longer displayed and the **Total** rows are now correct on the Registration Groups (Dated) report when run for a date in the future (via [Reports](#) | [Run Report – Focus](#) | [Student](#) | [Registration Groups \(Dated\)](#)).
- The number of **British Pupils** and **Overseas Pupils** are now calculated correctly on the **Analysis** tab of the ISC Current Students report (via [Reports](#) | [Run Report](#)).

## SIMS Activities

SIMS Activities is a web-based solution that supports the anytime, anywhere management of extra-curricular activities.

SIMS Activities can be used to manage any activities, whether they take place on-site or off-site, during the school day, after school, at weekends or during holidays. From sending out invites and managing responses to generating registers, SIMS Activities helps to reduce administration time for staff, improves safeguarding and can help to drive parental engagement.

SIMS Activities does not form part of the SIMS 2018 Spring Release.

For information on the latest release of SIMS Activities, please refer to the SIMS Activities Newsfeed notification, which is available from the My Account website (<https://myaccount.capita-cs.co.uk/Notifications/sims-activities-newsfeed-su/>).

## New Features

## Changes to Enrolment Status Functionality



[Focus | Pupil \(or Student\) | Pupil \(or Student\) Details](#)  
[Routines | Pupil \(or Student\) | Change Enrolment Status](#)

The **Enrolment Status** field in the **Registration** panel on the pupil/student record is now read-only (unless a new record is being created).

It is now possible to make changes to the **Enrolment Status** on the **Change Enrolment Status** page only, where the **Student Date of Change** and **Notes** fields have been added to the **Registration** panel.

The enrolment status changes can now be viewed on the pupil/student record by clicking the adjacent **Browser** button to display the **Enrolment Status Changes** dialog.

## Addition of the Communicator Field



[Focus | Pupil \(or Student\) | Pupil \(or Student\) Details - Communication Log link in the Links panel](#)  
[Focus | Admission | Application - Communications panel](#)  
[Focus | Communication - Basic Details panel](#)  
[Reports | Design Reports - Focus | Communication](#)

The **Communicator** field has been added to various areas of SIMS, enabling schools to record which members of staff have dealt with communications. This field has also been added to the reporting dictionary.

## Re-Allocating a UPN



[Focus | Pupil \(or Student\) | Pupil \(or Student\) Details](#)  
[Focus | Admission | Application](#)

It is now possible to re-allocate a UPN from within the pupil/student and applicant records. This functionality was previously available only on request.

## Identification of Obsolete and Invalid Lookups



[Focus | Pupil \(or Student\) | Pupil \(or Student\) Details](#)  
[Focus | Admission | Application](#)  
[Tools | Setups | User Options](#)

Lookup values that have been marked as inactive are now displayed in the colour selected as the **Unusual Value Text Colour** on the **Customisation Options** page when viewing the pupil/student and applicant records.

## Enhancements to School Options



[Tools | Setups | School Options](#)

It is now possible to hide the **National Identity** field displayed in the **Ethnic/Cultural** panel of the pupil/student and applicant records using the **Hide National Identity** check box on the **School Options** page.

It is also possible to hide the warning message that is displayed when saving the pupil/student record using the **Display DOL warning** check box, if the **Date of Leaving** is recorded as more than 14 days in the past. The default number of 14 days in the past can be changed in the **Number of days** field.



## Enhancements to Lookups



[Tools](#) | [Lookups](#) | [Maintain](#)

It is now possible to record and maintain **Document Type** lookups.

## Addition of a Warning Message when Editing the Admission Date



[Focus](#) | [Pupil \(or Student\)](#) | [Pupil \(or Student\) Details](#)

To help avoid re-admission procedures being carried out inadvertently via the incorrect menu route, a warning message is now displayed when saving the pupil/student record if the **Admission Date** in the **Registration** panel is changed.

## Enhancements to Bulk Update



[Routines](#) | [Pupil \(or Student\)](#) | [Bulk Update](#)

It is now possible to bulk update User Defined Fields that are **True/False** or **Lookup** (as defined in [Tools](#) | [Setups](#) | [User Defined Fields](#)) by selecting from the **Data Item** drop-down list. User Defined Fields are listed as **UDF - <UDF name>**.

It is now possible to export the **Bulk Update** table to Microsoft<sup>®</sup> Excel using the **Print** button.

The **Effective Date** field is now disabled for non-dated data items (e.g. **Birth Certificate Seen**, **Country of Birth**, etc.).

## Addition of a Warning Message when Adding or Editing the Date of Leaving



[Focus](#) | [Pupil \(or Student\)](#) | [Pupil \(or Student\) Details](#)

[Routines](#) | [Pupil \(or Student\)](#) | [Leavers](#)

By default, a warning message is now displayed on saving if the **Date of Leaving** is changed to more than 14 days in the past. It is possible to hide the message or edit the default number of 14 days via [Tools](#) | [Setups](#) | [School Options](#).

## Addition of a Confirmation Message when Adding a Contact



[Focus](#) | [Pupil \(or Student\)](#) | [Pupil \(or Student\) Details](#)

[Focus](#) | [Admission](#) | [Application](#)

A confirmation message is now displayed when attempting to record the selected pupil/student as their own contact in the **Family/Home** panel.

## Fixes

This release includes fixes in the following areas:

- The **Find Unlinked Contacts** browser no longer excludes people who have received a communication (via [Tools](#) | [Housekeeping](#) | [Delete Unlinked Contacts](#)).
- Where unlinked contacts could not previously be deleted and their surnames subsequently changed to **\$\$deleted\$\$**, these contacts can now be deleted (via [Tools](#) | [Housekeeping](#) | [Delete Unlinked Contacts](#)).
- When editing the academic year, an error no longer occurs when clicking the **Update** button after removing a teacher training day (via [Routines](#) | [School](#) | [Edit Academic Year](#)).
- Leavers are no longer displayed when filtering on pupil/students' **SEN Status** on the School Intervention Report (via [Reports](#) | [Interventions](#) | [School Intervention Report](#)).
- The **Restrict User Groups** list now includes custom system manager groups created from the **Administration Assistant**, **Class Teacher**, **Pastoral Manager** and **Senior Management Team** template groups (via [Tools](#) | [Setups](#) | [Behaviour Management](#) | [Detention Type](#)).
- All groups displayed in Discover graphs are visible in SIMS unless their status is set to **Obsolete** (via [Focus](#) | [Groups](#) | [Discover Groups](#)).
- The **Pupil does not have a Grounds for Removal** message is no longer incorrectly displayed when attempting to export a **CME – Leavers** file (via [Routines](#) | [Data Out](#) | [CTF](#) | [Export CTF](#)).

## SIMS ID

SIMS ID enables a single login point for multiple pieces of software. It works by synchronising key user data between SIMS and SIMS ID, enabling a Single Sign On (SSO) experience for pupil/students, staff and parents. Accounts, groups and timetable data are synchronised between SIMS and SIMS ID, with both administrators and users accessing SIMS ID as their go to point entry for local and online services.

- **SIMS ID Light** manages users in Cloud Services such as Hosted SIMS, Office 365 and Google.
- **SIMS ID Standard** manages users in Local Services such as Active Directory, as well as Cloud Services where required.

SIMS ID does not form part of the SIMS 2018 Spring Release. For more information, please visit the SIMS ID product page on the Capita SIMS website (<http://www.capita-sims.co.uk/simsid>).

## SIMS Interventions

### Fixes

This release includes fixes in the following areas:

- Pupil/students in **Alternative Curriculum** groups are now displayed correctly when populating the **Interventions Student Selector** dialog (via **Focus | Interventions | Plan Intervention**).
- Curriculum scheme classes are now displayed correctly in the **Interventions Student Selector** dialog (via **Focus | Interventions | Plan Intervention**).

## SIMS Services Manager

The SIMS 2018 Spring Release does not include an update to SIMS Services Manager and it does not provide the facility to install the product.

If SSM is not currently installed, the latest version is available from *SIMS Release Download Links and Product Information* in the **Notifications** area on My Account (<https://myaccount.capita-cs.co.uk/Notifications/SIMS-Release-Download-Links/>).

The current version ensures compatibility between SIMS and SSM, as well as products that make use of SSM.

For customers that centrally host SSM, please refer to the most recent manual SSM update, which is available from *SIMS Release Download Links and Product Information* in the **Notifications** area on My Account (<https://myaccount.capita-cs.co.uk/Notifications/SIMS-Release-Download-Links/>).

## Staff Performance

### New Features



### Highlighting All Instances of a Member of Staff on the Line Management Structure

*Tools | Staff | Staff Performance | Line Management Structure*

To facilitate the identification of members of staff in the Line Management Structure, when the name of a member of staff is selected, each instance of their name is highlighted in yellow. This is particularly useful if you are the appraiser of a number of staff, and when planning the re-allocation of staff if a member of staff leaves or moves position.

### Transferring Relationships on the Line Management Structure

*Tools | Staff | Staff Performance | Line Management Structure*

It is now possible to transfer all the relationships on the Line Management Structure from one member of staff to another in a single process. This is particularly useful when somebody leaves or moves position within the school. Previously, each relationship had to be resolved manually.

### Recording Self Evaluation Details

*Focus | Person | Staff - Appraisals*

In preparation for their review, it is now possible for appraisees to complete a self-evaluation against set objectives and standards.

## Adding Staff Review Comments

*Focus | Person | Staff - Appraisals*

It is now possible for appraisees to record their own review comments. Once recorded, these comments can be reviewed by appraisers.

## Enhancements to the Appraisal Print Output

*Focus | Person | Staff - Appraisals*

When printing the details of an appraisal, the output has been enhanced so that the headings now align appropriately and the details of the review are displayed within the main print area.

## Provision of the SP Administrator Permissions Group

*Focus | System Manager*

A new permissions group named SP Administrator has been provided. It is envisaged that members of this group will be staff who have responsibility for reporting on staff performance and for recording information on behalf of the Senior Management Team.

Members can view and edit all of the Staff Performance details (with the exception of review details) of all members of staff in the Line Management Structure hierarchy, even if they are not represented on the Line Management Structure themselves.

## Teacher app

### SIMS Teacher app Compatibility

The SIMS Teacher app is guaranteed to support the previous two releases of SIMS, inclusive of any release with which it is shipped.

The SIMS Teacher app can be used alongside the following versions of SIMS:

- SIMS 2018 Spring Release (SIMS 7.180)
- SIMS 2017 Autumn Release (SIMS 7.178).

Please note that the Teacher app does not form part of the SIMS 2018 Spring Release. For information on new features and enhancements, please refer to the [What's New](#) section of the SIMS Teacher app [Help Centre](#), which is available by clicking the [Help Centre](#) button in the app.