



**SIMS**

# **Preparing for the New Academic Year**

**Using Nova-T6 and  
Options Online to  
Prepare the Timetable**

**Preparation Guide**

## Revision History

Version	Change Description	Date
2022 - 1.0	Initial release.	24/11/2021
2022 - 1.1	Contact information updated.	14/12/2021
2022 - 1.2	Support portal URLs updated.	31/01/2022
2023 - 1.3	Date Generalization edits	06/01/2023

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

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## Intended Audience of this Document

This document provides advice to users who wish to start working on next year's timetable and in particular, the Options process in SIMS Options Online. It does not cover the end of year processes – only the initial steps in preparing for the next academic year.

A document that provides guidance for schools using SIMS Options Online is available from the support portal ([https://customer.support-ess.com/csm?id=kb\\_article\\_view&sysparm\\_article=KB0036185](https://customer.support-ess.com/csm?id=kb_article_view&sysparm_article=KB0036185)).

**IMPORTANT NOTE:** Generally, the processes described in this document remain the same each year; they are not specific to a single academic year. The only changes made to this document each year relate to the graphical examples and the sample dates provided in the body of the text. In future years, if you wish to start your preparations for the next academic year before an updated edition of this document is made available, you can use the document prepared for the previous year as a guide, remembering to change the sample dates to those in the forthcoming academic year.

## Setting up Academic Information for the New Academic Year

This document provides advice to users who wish to start working on next year's timetable and in particular, the Options process. It does not cover the end of year processes – only the initial steps in preparing for the next academic year.

Before starting work in SIMS Options Online, there are some setup processes in SIMS and Nova-T6 that need to be carried out. We recommend that the person responsible for SIMS Options Online consults the System Manager, the Pastoral Manager and the Timetabler for assistance in carrying out the tasks outlined in this chapter. You are strongly advised to take a backup of the SIMS SQL database prior to creating a new academic year.

Following the release of SIMS Options Online, a number of changes will impact this process:

- SIMS Options Online replaces both Options 5 and SIMS Options Offer.
- Once all necessary work in SIMS Options Online has been completed, the data should be transferred back into SIMS. The new blocks of classes can then be imported into Nova-T6, where they will be integrated with the remainder of the curriculum in readiness for scheduling.
- There is no longer a requirement to transfer data from SIMS Options Online directly into Nova-T6.

A wide range of documentation is available from within SIMS via the **SIMS Documentation Centre** and can be accessed by clicking the **Documentation** button on the **SIMS Home Page**. The range of documentation includes handbooks, tutorials, mini guides and quick reference sheets. Once open, click the appropriate button (e.g. **Handbooks**), then navigate to the applicable option.

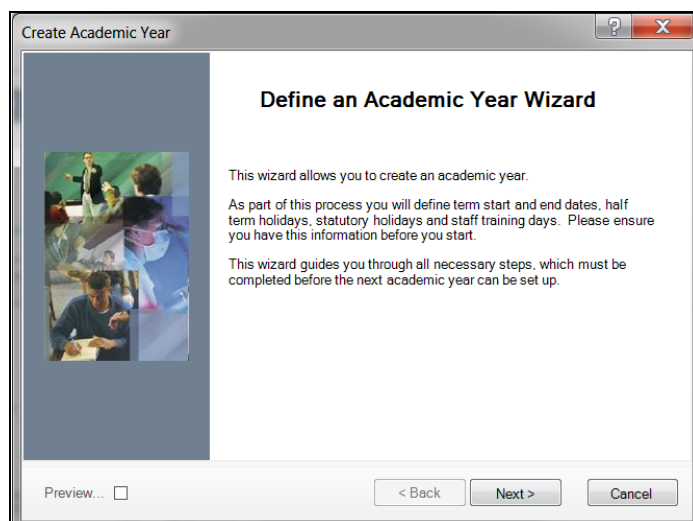
References to any other documents mentioned in this handbook can be accessed from the **SIMS Documentation Centre** unless otherwise specified.

## Creating a New Academic Year

Check that the pastoral structure for the current academic year is correct and does not need to be modified for the new academic year. This can be achieved by selecting **Focus | School | Pastoral Structure | Current Structure** and should be done before creating a new academic year. If any changes are required, you are strongly advised to make the changes prior to creating the new academic year because next year's pastoral structure is based on this year's structure.

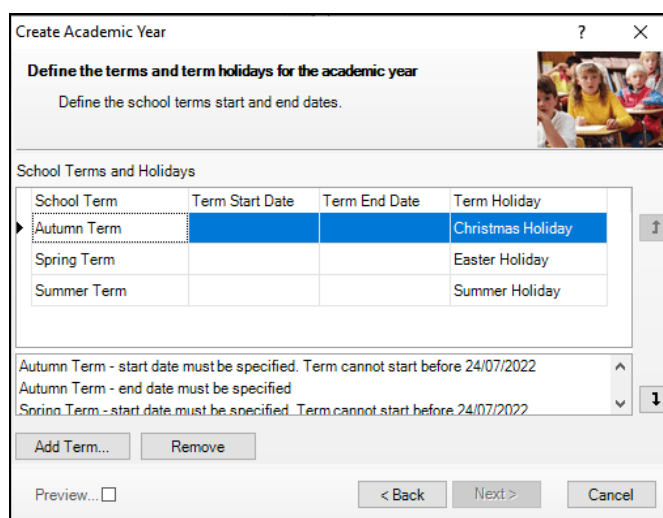
The process of creating a new academic year is very demanding on the SQL server and should be carried out when a minimal number of users are accessing SIMS, ideally when no users are logged on.

1. In SIMS, select **Routines | School | Academic Year** to display the **Define an Academic Year** wizard.



The wizard guides you through the process of creating a new academic year. For more detailed instructions on this process, please refer to the *Creating an Academic Year* chapter in the *Setting Up and Administering SIMS* handbook.

2. Click the **Next** button to continue.
3. Complete the details on the **Define the school working week** page and click the **Next** button to continue.



It is not essential to set the dates for half terms, teacher training days or public holidays at this time; these can be added or amended later.

A summary of the details that you have entered is displayed. Check this information carefully before clicking the **Create** button.

4. Select **Tools | System Diagnostics | Database Diagnostics** to display the **Diagnostic Results** page.
5. Click the **Run** button on the toolbar and then click the **Yes** button to continue.

6. Correct any identified errors before closing the **Diagnostic Results** page.

## Setting up Promotion Paths

1. Check that the pastoral structure for the next academic year has been set up (it is not essential for next year’s registration groups to be known at this stage). Select **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the **Next Academic Year Pastoral Structure** page.

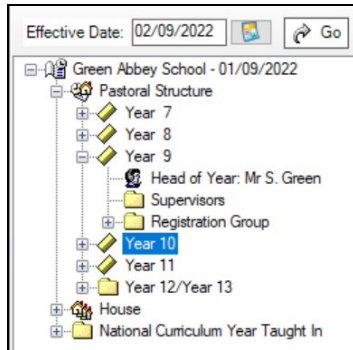


Image: The dates shown in this screenshot are illustrative and are not using current dates

2. To set up the promotion path mapping, select **Routines | School | Promotion** and then click the **Ok** button to prepare the pupil/student data.
3. Click the **Load** button to populate the **Setup Promotion Mapping** dialog. This may take several minutes to populate with data.

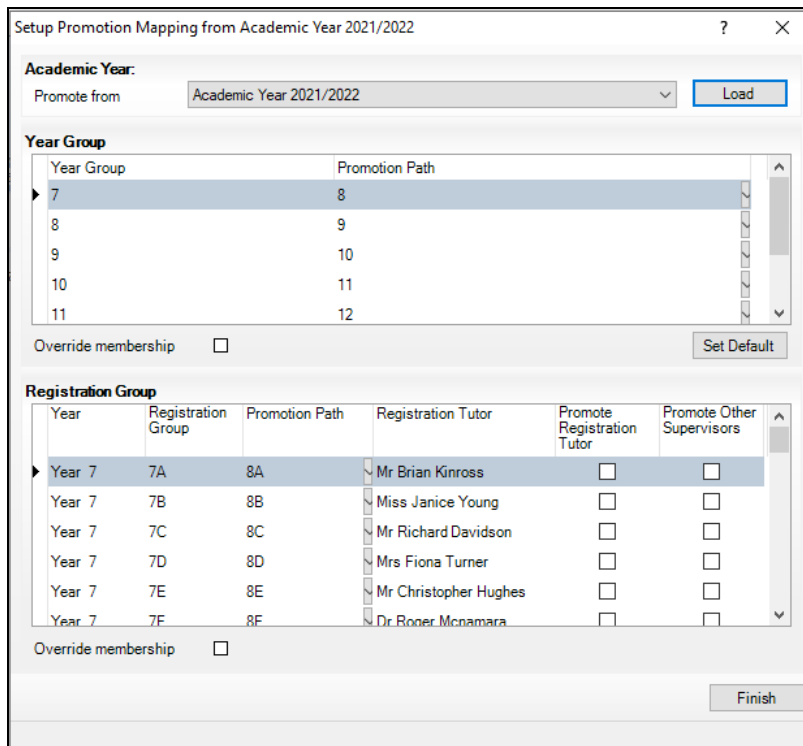


Image: The dates shown in this screenshot are illustrative and are not using current dates

This dialog enables you to map *current* year registration groups to the *next* year registration groups. This can be done later, if necessary.



4. Ensure that the new academic year is selected from the **Promote from** drop-down list.
5. Ensure that both the **Override membership** check boxes are selected. If they are not selected, the promotion will not function correctly (e.g. Year 9 will remain as Year 9, Year 10 will remain as Year 10, etc.).
6. Click the **Finish** button to display the **Promote pastoral groups** page.

Promote pastoral groups					
Save Map Filter Customize					
Name	Unusual	Current Year Group	Next Year Group	Current Registration Group	Next Registration Group
+ Current Year Group: 7					
+ Current Year Group: 8					
- Current Year Group: 9					
Abbot, Hannah	<input type="checkbox"/>	9	10	9B	10B
Adams, Melanie	<input type="checkbox"/>	9	10	9D	10D
Adkins, Richard	<input type="checkbox"/>	9	10	9E	10E
Ainsworth, Alison	<input type="checkbox"/>	9	10	9C	10C
Andrews, Bethany	<input type="checkbox"/>	9	10	9E	10E
Aperen, Alex	<input type="checkbox"/>	9	10	9E	10E
Ashworth, Imogen	<input type="checkbox"/>	9	10	9C	10C
Atkinson, Bridget	<input type="checkbox"/>	9	10	9F	10F
Austin, Shannon	<input type="checkbox"/>	9	10	9D	10D
Barbut, Rachel	<input type="checkbox"/>	9	10	9B	10B
Barnard, Andrew	<input type="checkbox"/>	9	10	9E	10E
Barnstable, Tracy	<input type="checkbox"/>	9	10	9D	10D
Berrett, Rhys	<input type="checkbox"/>	9	10	9D	10D
Bond, Craig	<input type="checkbox"/>	9	10	9A	10A

If required, individual pupil/student changes can be made in this screen. Registration groups can be edited at a later date because they are not needed for the Options process.

For SIMS Options Online to operate successfully, it is necessary only to make sure that pupil/students are correctly promoted into years for which Options Online will be used, e.g. make sure that the current Year 9 are correctly promoted to Year 10. The allocation of registration groups can be tidied up later.

7. Click the **Save** button to save any changes.

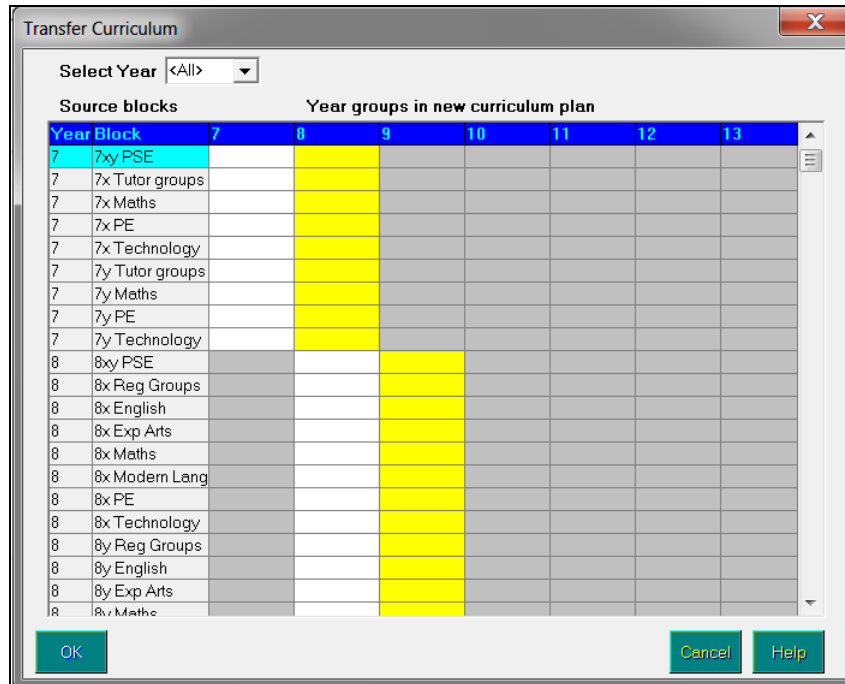
## Creating a Data Set for Next Year in Nova-T6

1. Run Nova-T6.
2. Load a data set containing the current timetable (i.e. for the 2021/22 academic year).

*NOTE: It is important that this is not a maintenance data set or a frozen data set.*

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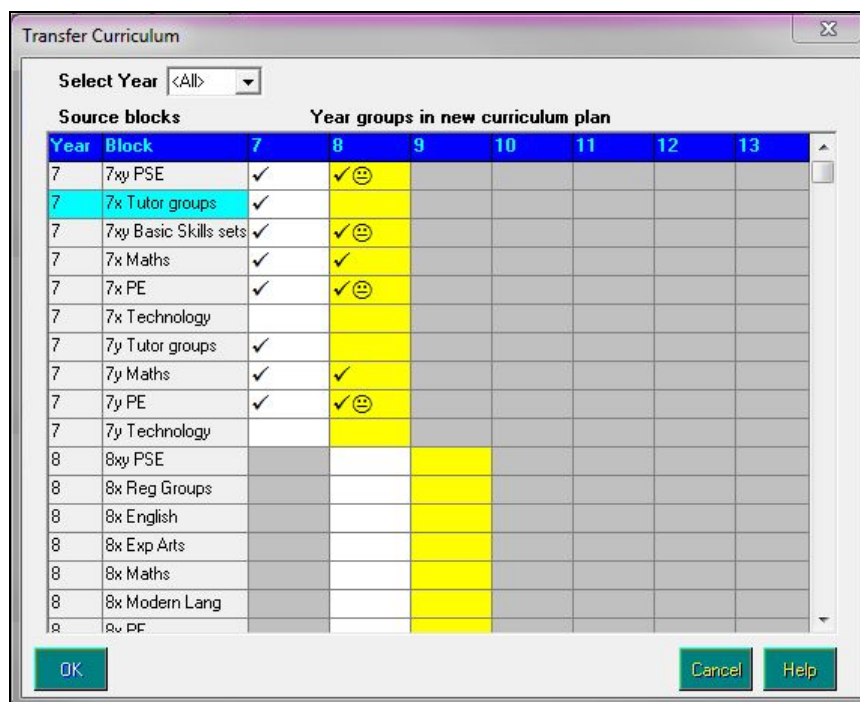
3. Select **Data | Transfer Curriculum** to display the **Transfer Curriculum** dialog.



All of the blocks in the curriculum plan are displayed but the list can be filtered by selecting an item from the **Select Year** drop-down list. The most likely columns for receiving transfers are coloured white (for moving across) and yellow (for moving up). A block may be transferred to any or all year groups, including grey ones.

4. A block and its classes can be copied without their attributes (teachers, and rooms, if any). Click a white cell to copy the block into the same year group for next year or click a yellow cell to copy the block into the next year group up (e.g. this year's Year 7 into next year's Year 8).

- A block and its classes can be copied, together with their assigned teachers (and rooms, if any). Click twice on a cell. Clicking into a cell places a 'tick', a second click adds a 'face' and a further click removes everything from the cell.



Right-clicking a cell removes its contents. The 'tick' indicates that the block is copied. The 'face' indicates that both staff and rooms (attached to classes in the curriculum plan) are also included. An example is shown in the previous graphic.

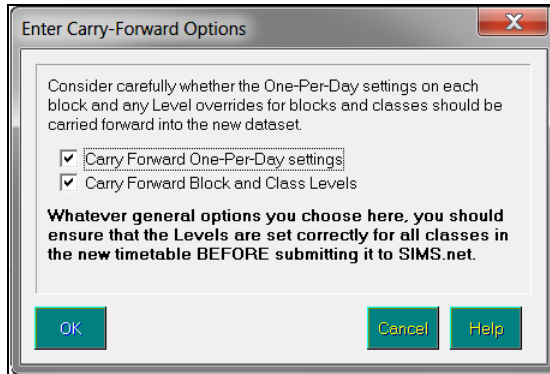
*NOTE: The **Shift** key can be used to mark for transfer a series of blocks.*

- When you have set up all the required transfers, click the **OK** button to display the **Enter Carry-Forward Options** dialog.

It is now possible for the One-Per-Day settings of a block to be carried forward to a new dataset (via **Data | Transfer Curriculum**). It is also possible for block and class levels to be carried forward to a new dataset.

**IMPORTANT NOTES:** All classes, and particularly classes for Years 12 and 13, must have the correct levels assigned to them. These details must be transferred to SQL before the start of the academic year.

Please consult the Examinations Officer, the Returns Officer and the staff members responsible for Course Manager regarding the allocation of levels to classes.



7. The new dataset is given the default name of <NoName>. You should save this dataset with a new, appropriate name, e.g. 2022-23A.

If you are using a copy of this year's dataset instead of using the Transfer Curriculum routine, you must run **Tools | Remove SQL Links**.

## The Curriculum Structures in SIMS

SIMS Options Online enables you to allocate students to pathways, each of which corresponds to the style of curriculum to be followed and may be associated with its own set of Option course choices. Each pathway is allocated a band code and when the SIMS Options Online data is transferred into SIMS, the bands are created and populated automatically.

*NOTE: If you want to create and submit bands into SIMS at this early stage, you can do so. However, it is important that no blocks are submitted for the years for which you intend to use SIMS Options Online because this would prevent the transfer from SIMS Options Online from taking place.*

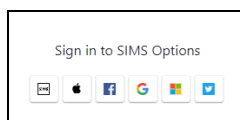
## Setting up a New Plan in Options Online

To use SIMS Options Online, ensure that you have been assigned to the Curriculum Manager group in SIMS System Manager.

SIMS Options Online is a web-based application. It reads school, student and course data from a web data store that is updated regularly from SIMS using the SIMS Services Manager. Data is transferred on an hourly basis, after the addition of a student or a course in SIMS, be aware that the new data may not be visible immediately.

SIMS Options Online can be run from a web browser of your choice, or from within SIMS. However, once the Options process has been completed and the plan is ready to be submitted into SIMS, SIMS Options Online must be run from within SIMS.

1. In SIMS, select **Focus | Options Online** to display the login page.



2. Select the **Account Type** that you used to register with the Options Online service and enter your login credentials. Once logged in, you will be directed to the Options Online **Home Page**.

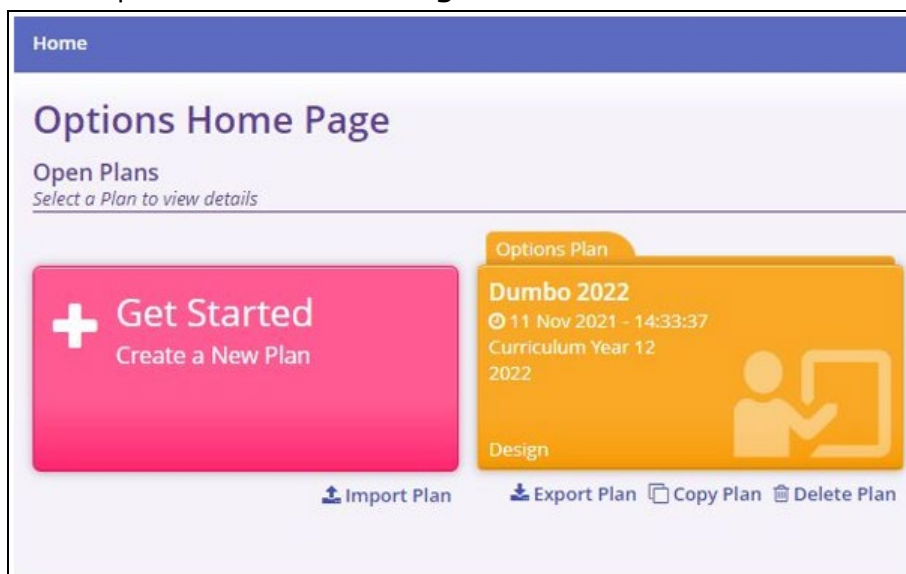


Image: The dates shown in this screenshot are illustrative and are not using current dates

The **Home Page** enables you to create an Options plan by clicking **Get Started**, or to open an existing one. The **Plan Definition** page is displayed. The folder colours are determined by the status of the plan.

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The **Plan Definition** page enables you to set the parameters of the Options plan.

The screenshot shows the 'Plan Definition' page with the following sections:

- Plan Details**: Set the option plan parameters. Fields include 'Target membership start date' (01/10/2022), 'Target membership end date' (dd/MM/yyyy), 'Target year taught in' (Curriculum Year 10), and 'Name' (Curriculum Year 10 2022).
- Class Sizes**: Edit default class sizes. Fields include 'Minimum' (20), 'Preferred' (25), and 'Maximum' (30).
- Required Approvals**: Enable school approval for student choices. A checkbox labeled 'School should approve student choices' is present.
- Parent Permissions**: Control level of access for Parents. A dropdown menu for 'Allow Parents to edit Choices' is set to 'Never'.
- Pathways**: Define pathways and add notes. A table shows 'Pathways in the plan' with columns for Name, Band Code, and Notes. One pathway is listed: 'Pathway: A' with Band Code 'A' and a note icon. An 'Add pathway' button is at the bottom.





Image: The dates shown in this screenshot are illustrative and are not using current dates

3. Select a minimum of **Name**, **Target year taught in** and a **Target membership start date**. These are mandatory fields.
4. The class sizes default to 20 (**Minimum**), 25 (**Preferred**) and 30 (**Maximum**), but can be edited.

*NOTE: These numbers should be considered as guidelines because they are not enforced by the software. It is possible to create classes that are below the minimum or above the maximum sizes.*

5. Select the **School should approve student choices** check box, if required.

6. Create pathways by clicking the **Add pathway** button. Pathways are used for to offer students a different selection, e.g. based on ability, such as the Academic Pathway and Progress Pathway in the following graphic. Students can be assigned to a pathway on the **Pathways and Students** page.

Pathways			
Define pathways and add notes			
Pathways in the plan			
	Name *	Band Code *	Notes
	Academic Pathway	a	
	Progress Pathway	b	
<a href="#">+ Add pathway</a>			

The **Name** and **Band Code** are populated automatically but can be edited. The **Band Code** is a single alpha-numeric character that is displayed below the student's name in the Solution Editor and is used to identify a student's pathway. It also enables pathways to be recognised by SIMS and Nova-T6.

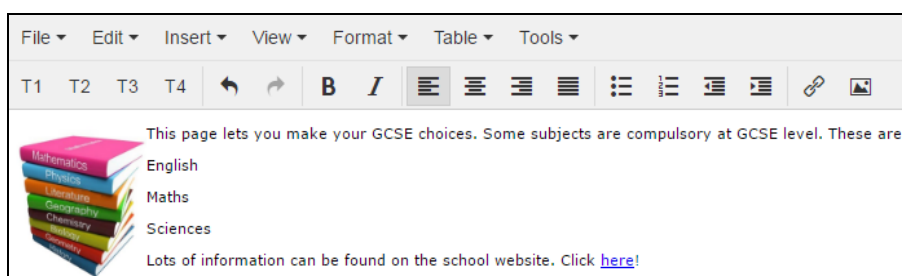
7. Click the **Notes** button adjacent to the relevant **Pathway** to display the **Notes - <Pathway name>** editor.



*Notes button (notes not created)*



*Notes button (notes created)*



8. Enter text to instruct the students how to make their choices, e.g. All students will study English and Maths.

Notes are displayed on-screen in a panel for the student when they are selecting their courses, and are a direct representation of what has been entered by the Options Administrator. Many of the features in the Notes Editor (e.g. bold, italics, numbered lists, etc.) will be familiar to users of Microsoft® Word.

9. Click the **OK** button to return to the **Plan Definition** page.
10. Click the **Next** button to display the **Pathways and Students** page.



**Additional Resources:**

For more information on recording notes, please refer to the *Creating and Editing Notes* topic in the *Appendix* of the *Options Online User Guide*, which is available on the support portal ([https://customer.support-ess.com/csm?id=kb\\_article\\_view&sysparm\\_article=KB0037436](https://customer.support-ess.com/csm?id=kb_article_view&sysparm_article=KB0037436)).

## Carrying out the Options Process

Once a new plan has been created, the Options process can begin. This usually consists of the following activities:

**Stage 1 - Designing the Options Plan**

- Define pathways and their associated band codes.
- Select the students who will be pursuing each pathway.
- Define the lists of courses from which the student's choices will be made.
- Associate the course lists with pathways.
- Define the appropriate number of Option blocks.

**Stage 2 - Students Make Choices**

- Schools typically allow a two week time period to enable students to make their course choices online.
- A period of choices review and potential career discussion may occur, before the final stage begins.

**Stage 3 - Producing a Solution**

- Generate classes for each course.
- Allocate the classes to blocks.
- Assign students to the relevant classes.

**Once these stages are complete**

The data can be submitted back into SIMS. The data should consist of the following components:

- blocks of classes
- student class memberships
- student band memberships (derived from the pathway allocations)
- course/class associations.



## Transferring Blocks of Classes from Options Online to Nova-T6

There are two methods of transferring blocks of classes from Options Online to Nova-T6:

### Method 1 - via SIMS

The main benefits of this method are:

- The class memberships are available in SIMS more quickly.
- The blocks of classes in Nova-T6 are linked to the structure in SIMS so that the subsequent submissions from Nova-T6 are more robust, if you should edit the class names in Nova-T6 for example.

### Method 2 - Using a MOD File

The main benefits of this method are:

- An updated MOD file can be imported into Nova-T6 more than once.
- The blocks are available in Nova-T6 early, before being certain that work in Options is finished.

There is no significant difference between the resulting blocks as represented in Nova-T6. In both cases, it is necessary to ensure that the correct subjects have been imported into Nova-T6 before importing the blocks. When importing the blocks from SIMS (method 1), you have more control over the process, e.g. you can specify the number of periods for each block individually.

In both cases, you must subsequently transfer the whole curriculum. Finally, once the Options process is complete, you can submit the blocks, classes and memberships to SIMS.

## Exporting from SIMS Options Online to SIMS

**IMPORTANT NOTE:** Always make a backup in SIMS before exporting the curriculum.

To transfer the Options data to SIMS, you must first download the data from SIMS Options Online. There are two ways to achieve this.

### *Direct Access to Options Online from SIMS Method*

1. In SIMS, select **Focus | Options Online** and log into Options Online.
2. Select the required plan. The plan must have the status of **Locked**.
3. Click the **Retrieve** button at the top of the **Options Online** page.
4. Click the **OK** button to display a summary of the blocks of classes within the plan.

### *Alternative Method*

1. If you are unable to log into Options Online from SIMS, open Options Online from your preferred Internet browser and log in.
2. From the **Home** page, click the required plan and click the **Export Plan** button.

An .OPT file is created, usually in the Downloads folder on your PC, and this can be transferred to SIMS.

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3. In SIMS, select **Focus | Options Online** but do not attempt to log in to Options Online.
4. Click the **Select File** button to display the **Select OPT file to import** dialog.
5. Navigate to the stored file in the Downloads folder, click it and click the **OK** button.
6. Once the file has imported, select the **Blocks** and **Students** tabs to verify the data is correct.

When you are happy with the summary, click the **Submit** button. If the SIMS database already contains blocks of classes from a previous submission, you may need to use the **Link Curriculum** tab.

In SIMS, the submission will have generated the following data:

- bands that correspond to the pathways in the target year group
- student memberships of the bands
- blocks of classes that correspond to the solution created in SIMS Options Online
- student memberships of the classes.



### Additional Resources:

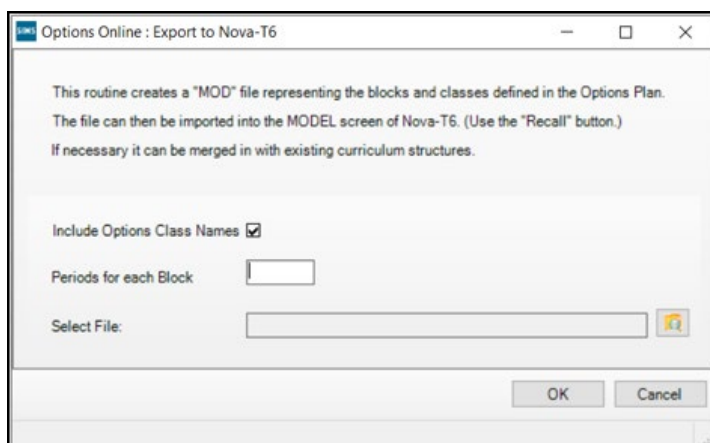
For more information, please refer to the *Transferring Class Memberships to SIMS* topic in the *Creating an Options Plan* chapter of the *Options Online User Guide*, which is available on the support portal ([https://customer.support-ess.com/csm?id=kb\\_article\\_view&sysparm\\_article=KB0037436](https://customer.support-ess.com/csm?id=kb_article_view&sysparm_article=KB0037436)).

## Exporting Block Structures to Nova-T6

The blocks and classes defined in Options Online can be imported via the **Model** screen in Nova-T6. The import should be completed before finalising class memberships in Options. This process enables the timetabler to investigate the possibilities for staffing and scheduling of individual blocks.

1. In SIMS, select **Focus | Options Online** and open a locked plan.
2. Either click the **Retrieve** button or import from an .OPT file (please see *Exporting from SIMS Options Online to SIMS* on page 13). The blocks and classes in the selected plan are displayed.
3. The **Class Names** radio buttons on the left-hand side of the page enable you to decide whether the class names should be numbered across each block or across the whole plan.

- Click the **Export to Nova-T6** button to display the **Options Online: Export to Nova-T6** dialog.



This enables the block structure to be saved as a .MOD file, which can then be imported into Nova-T6, or merged with existing curriculum structures, if required.

- Select the **Include Options Class Names** check box if you want the MOD file to contain the Options plan-based class names. Block-based is the normal Nova-T6 convention. This check box is already selected if you chose **Plan-based** on the previous page when selecting the type of **Class Names**.
- Enter the number of required **Periods for each Block**.
- Specify a suitable storage location for the MOD file by clicking the **Browse** button and navigating to the required folder.
- Click the **OK** button to create the MOD file.

A confirmation message is displayed once the process is complete.

## Importing the new Blocks into Nova-T6

The classes that have been created in SIMS Options Online and transferred into SIMS must now be transferred to Nova-T6. This ensures that they are integrated with the remainder of the curriculum and can be scheduled on the timetable.

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1. In Nova-T6, click the **Model** button and select the **Load Curriculum from SIMS** option.

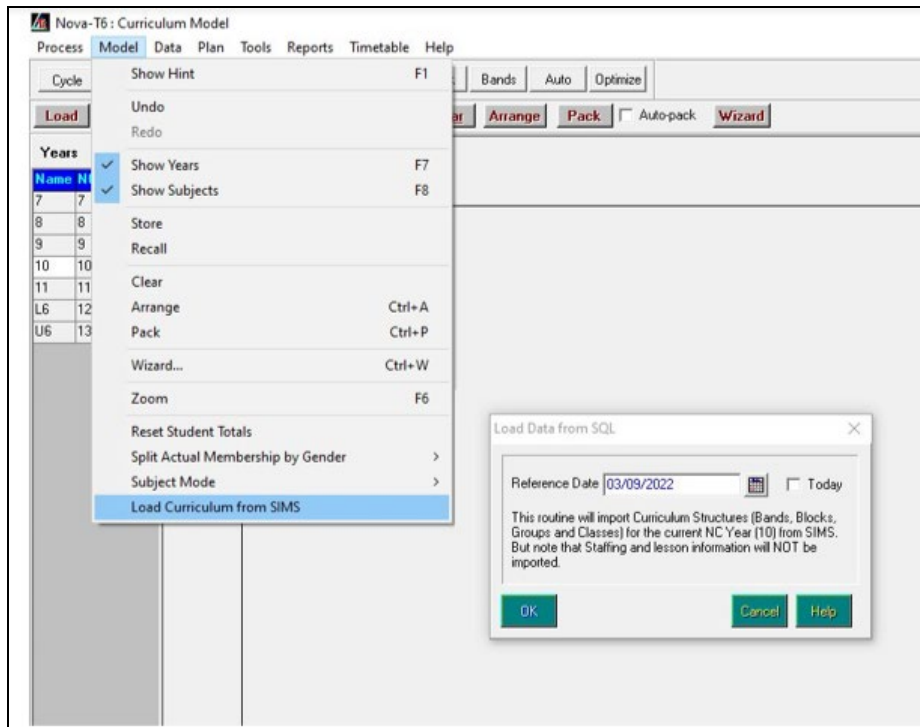
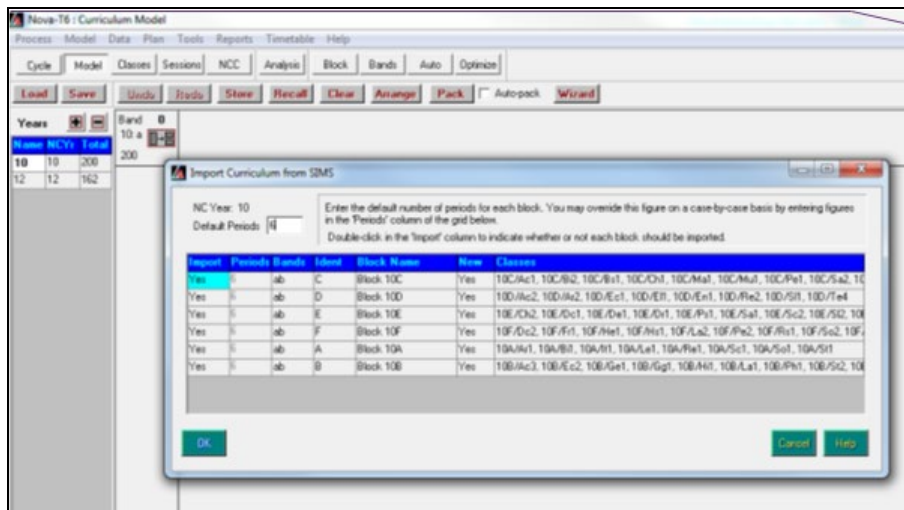


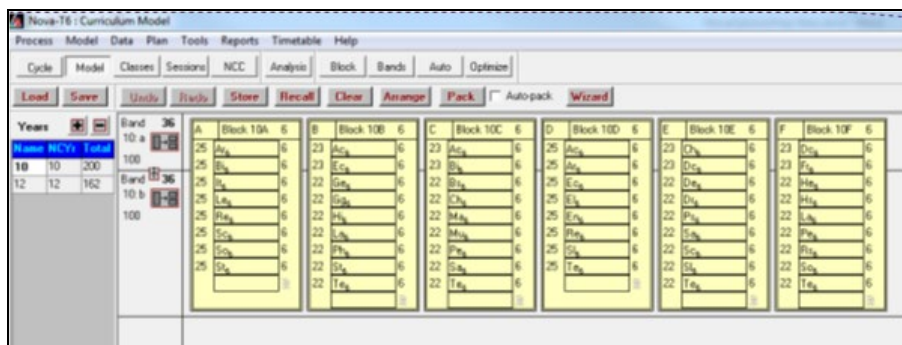
Image: The dates shown in this screenshot are illustrative and are not using current dates

2. Specify the **Reference Date** in line with the new academic year.



3. In the **Import Curriculum from SIMS** dialog, enter the number of **Default Periods** for each block. It is usual for the same number of periods to be scheduled for all the blocks. However, it is possible to specify a different number of periods for each block, if required.

After specifying the default periods for all blocks, the **Model** screen for the new academic year displays the imported SIMS Online Options blocks, ready for staffing and scheduling. You can also add extra blocks to the years that were not part of the Options process.



## Modifying the Bands

The band structure generated by SIMS Options Online may sometimes need to be modified to enable more than one band per pathway.

If a band is split and all the blocks are extended over the new band(s), when the curriculum is submitted back to SIMS, the students will need to be redistributed across the additional bands.



# 02 | Summary of Processes

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### Summary of Processes Check List

This section provides a summary of the processes described earlier in this document.

#### In SIMS:

Complete	Task Description
<input type="checkbox"/>	Back up the SIMS SQL database.
<input type="checkbox"/>	Check that the pastoral structure for the current academic year is correct.
<input type="checkbox"/>	Create a new academic year (via <b>Routines   School   Academic Year</b> ).
<input type="checkbox"/>	In SIMS, run the SIMS Database Validator (via <b>Tools   System Diagnostics   Database Diagnostics</b> ).
<input type="checkbox"/>	Check that the pastoral structure for next year has been defined correctly (via <b>Focus   School   Pastoral Structure   Next Academic Year Structure</b> ).
<input type="checkbox"/>	Set the promotion paths (via <b>Routines   School   Promotion</b> ).
<input type="checkbox"/>	Change to the next academic year (via <b>Tools   Academic Management   Set Academic Year</b> or via the SIMS Home Page).
<input type="checkbox"/>	Select a scheme, e.g. <b>Base bands in Year 10</b> (via <b>Focus   School   Academic Structure   Curriculum Assignment by Scheme</b> ).
<input type="checkbox"/>	Select the working academic year as the Effective Date Range.
<input type="checkbox"/>	Place the current students (e.g. those in Year 9) in their appropriate band for the required year (e.g. Year 10). Save the banding changes.

**In SIMS Options Online:**

Complete	Task Description
<input type="checkbox"/>	Create a new plan for the target year group, e.g. Year 10.
<input type="checkbox"/>	Design the plan, creating pathways, lists and blocks as appropriate.
<input type="checkbox"/>	Allow students to make their choices.
<input type="checkbox"/>	Create classes and devise a solution by placing classes into blocks in such a way that maximises the number of students who can follow their chosen courses.
<input type="checkbox"/>	Export the newly created blocks of classes and associated memberships from SIMS Options Online to SIMS.

**In Nova-T6:**

Complete	Task Description
<input type="checkbox"/>	Transfer elements of the last academic year's data set into a new file in the new academic year directory (via <b>Data   Transfer Curriculum</b> ).
<input type="checkbox"/>	Import the new blocks of classes from SIMS into the model for the appropriate year in Nova-T6.
<input type="checkbox"/>	In the target year, staff the classes and modify the bands as required. Create non-Option blocks. Work on the curriculum for other years and schedule the timetable.
<input type="checkbox"/>	Submit the completed curriculum and timetable to SIMS.

**In SIMS:**

Complete	Task Description
<input type="checkbox"/>	Re-assign students to the new bands created by splitting in Nova-T6, where applicable.
<input type="checkbox"/>	Select a scheme, e.g. <b>Base bands in Year 10</b> (via <b>Focus   School   Academic Structure   Curriculum Assignment by Scheme</b> ).