Data Management Services

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A Guide to setting up SIMS Options for 2019/20

This document is for setting up Options in the traditional way. There is now functionality for entering Student choices in SIMS and then exporting them to OPTIONS. Please see document **DMS106** (A Guide to setting up SIMS Options Offer for September 2019) for further details.

Further Documentation and Guidance for Options can be found in **SIMS | Homepage | Documentation | Handbooks | Timetabling & Curriculum**

Available on the ICT Services website
http://www.thegrid.org.uk/info/traded/sitss/timetables/options/

- Options - New Features
- DMS107 - Options a Quick Guide

Document Reference DMS105

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Setting up Academic Information for Year 2019/2020

Before starting work on Options create the Academic Year for 2019/2020

Please see document **DMS010 Creating the new Academic Year,** which needs to be completed before continuing with the Options setup.

The document can be found here:

http://www.thegrid.org.uk/info/traded/sitss/data/yearend/index.shtml

IMPORTANT: You must carry out the processes in the order listed in this document. We have provided a summary of the steps at the end of this document.

Please see the **Summary of Processes Check List** on Page 17 of this document.

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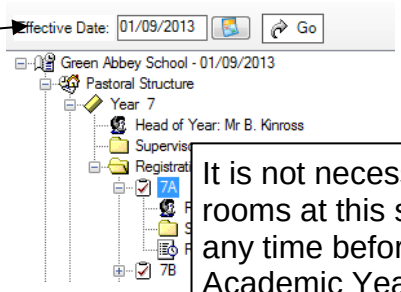
Setting up Promotion Paths

Before proceeding with this process, we recommend that the Pastoral Manager does the following:

1. Check that the Pastoral structure for the current Academic Year is correct and has no faults. This can be achieved by selecting **Focus | School | Pastoral Structure | Current Structure**. Then select **Go** to view the current structure.

2. Check that the pastoral structure for the next Academic Year has been set up with the correct Years (it is not essential for next year's Registration Groups to be known at this stage). This can be achieved by selecting **Focus | School | Pastoral Structure | Next Academic Year Structure** to display the following page:

This date should be the start of the 2019 Academic Year, 01/09/2019



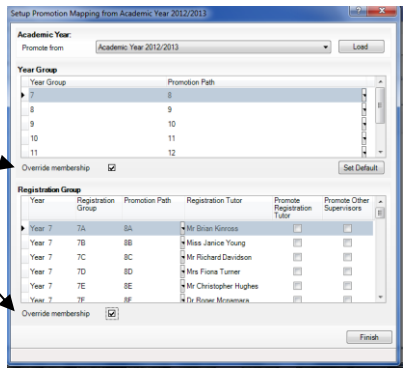
It is not necessary to define tutors and rooms at this stage. This can be done at any time before the start of the next Academic Year

3. To set up the promotion path mapping, select **Routines | School | Promotion** to open the **Setup Promotion Mapping** dialog. Click **OK** on the **Promotion Data Check** screen to run **Validate Memberships**. This may take some time. Wait for the green toolbar to stop running. Do not attempt to close the dialog box while it is running.

4. Click the **Load** button to open the **Setup Promotion Mapping from Academic Year 2018/2019** dialog.

5. Ensure that both of the **Override membership** check boxes are ticked. If these are not selected the promotion will not function correctly as Year 7 will remain as Year 7 etc.

Tick Override membership



This dialog enables you to map **current** year Registration Groups to the **next** year Registration Groups. You may wish to do this now so that Registration Group data is passed through to Options later in the process.

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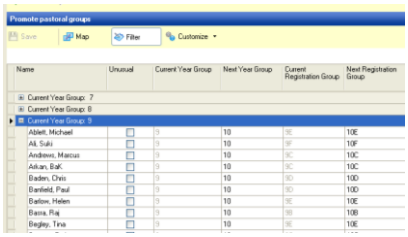
6. Click the **Finish** button to display the following screen. If required, individual student changes can be made in this screen. Registration Groups can be edited at a later date, as they are not needed for Options.



For Options Offer to operate successfully it is only necessary to make sure that the current Year 9 are correctly promoted to Year 10, and that the current Year 11 are correctly promoted to Year 12. The allocation of Registration Groups can be tidied up later.

7. Click the **Save** button to save any changes. This may take some time.

8. **Close** the window.

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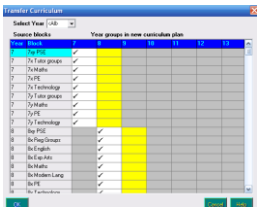
Preparing the Curriculum Structures in SIMS .net

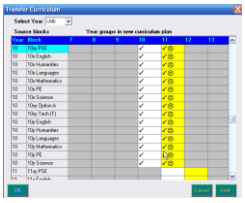
The next step describes how to assign students to bands for next year. The instructions are for setting up Year 9 into 10 Options, if you are setting up Year 11 into 12 Options then you follow the same instructions substituting 11 for 9 and 12 for 10.

Creating bands in the New Academic Year

For further information on how to set up **Nova-T6** for the next year please see document **DMS016** (Starting the Timetable Process for 2019).

1. **Open** Nova-T6.
2. Load your current timetable into Nova-T6.
3. Select **Data** | **Transfer Curriculum**.
4. For Blocks in Years 7, 8, 9, 10 and 12 put ticks in the **white cells**. This is done by clicking once in each cell.
5. For Blocks in years 10 and 12 put a tick and a face in the **yellow cells** (to promote Staff.) This is done by clicking twice in each cell.





This assumes that your curriculum structures will stay as they are this year for years 7, 8, 9, 10 and 12. It promotes the curriculum structures for years 10 and 12 to next years 11 and 13 together with the teachers for each class.

6. When you have finished click **OK**.
7. Click **OK** on the **Enter Carry Forward Options** window
8. A new timetable model will open, click **Save**.
9. Name the file **2019_20** and save in **S:\SIMS\SNOVA\NT6\2019**
10. Check the Curriculum Model is set up correctly for each year, deleting any Bands that are not needed.
11. Select **Data | Export Curriculum and Timetable to SQL . . .**
12. Enter the Start Date as **01/09/2019**.
13. Enter the End Date as **31/07/2020.**
14. **Tick** the **Export Band Structures Only** box.

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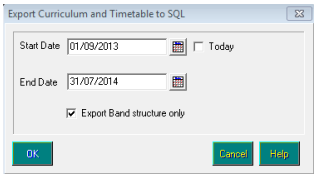


15. Continue through the wizard to send the band information to SIMS.net. Ignore errors due to unmatched Bands.

Set Academic Year

1. Switch to the next academic year by selecting **Tools | Academic Management | Set Academic Year**. (Or click on the Academic Year link on the SIMS **Homepage** and select **Academic Year 2019/2020**).

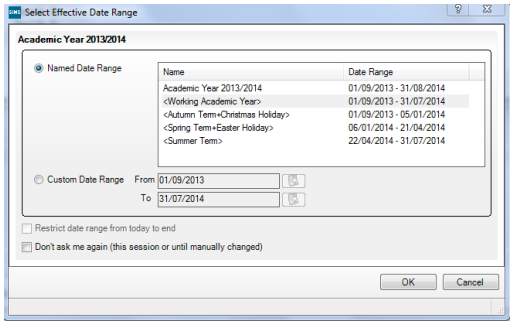
2. Highlight the **Academic Year 2019/2020** and click the **OK** button.

NOTE: Setting an Academic Year is user specific (regardless of the workstation used), i.e. other users will not be affected. If another user needs to edit the student curriculum for next year, they will also need to set the academic year to 2019/20. If the user, having changed to 2019/20, needs to work again on 2018/19, then that user will need to reset the academic year.

Placing Year 10 Students in Bands

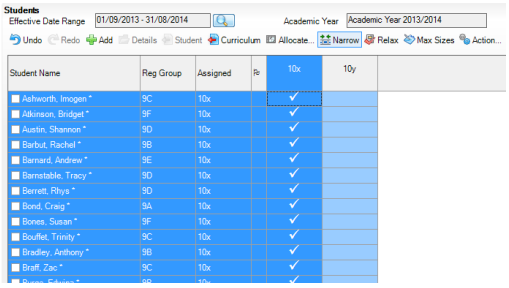
1. Select **Focus** | **School** | **Academic Structure** | **Curriculum Assignment by Scheme** to display the Find Curriculum Scheme browser.

2. Click the **Search** button to display the curriculum structure which you have transferred from Nova-T6. Select **Base Bands** in **Year 10**. Click **Open**. The **Select Effective Date Range** dialog will be displayed.



3. Select the **Working Academic Year** as the Effective Date Range to display the Memberships of Groups of a Scheme page. Make a note of the date range as you will need to enter it in Options later. The students in Year 10 and their current registration groups (i.e. Year 9) will be displayed in a grid with columns for each of the bands.

4. All potential students for Year 10 must be assigned to a band by ticking the grid – even if Option Blocks are not band specific.



If band memberships depend on Registration Groups, use the filter to select the students of a Registration Group, then:

- Click the required **Band** column heading, e.g. **10x**.
- **Action** | **Select All Students**.
- Action | **Tick Selected Cell(s)**.
- Click **OK**, all students should now be in **band x**.

5. Click the **Save** button on the toolbar to save your changes.

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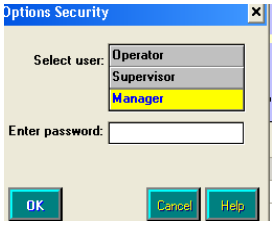
Options

Setting up a New Implementation in Options

In order to use Options, ensure that you have been assigned to the Timetabler or Curriculum Manager Group in System Manager. Click the **Options** icon in the SIMS .net Shortcut Panel.



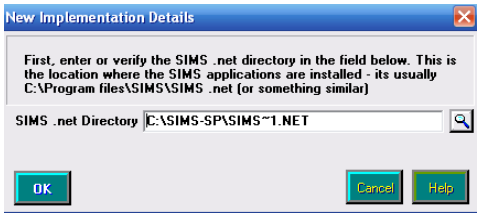
1. Select **Manager** as the user. The password should be left blank when you first access Options (if required, set a password by selecting **System | Passwords** or **Tools | Passwords**).

NOTE: There are two menus in Options – the **Process** menu and **Focus** menu. These notes assume that the **Process** menu is in use. To change to the **Process** menu click **Tools | Process Menu**. To change to the **Focus** menu click **System | Focus Menu**

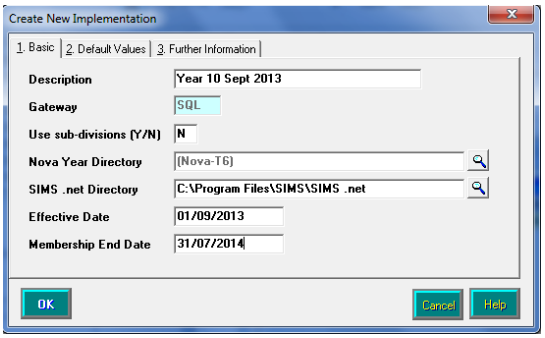
2. Create a new Implementation by selecting **File** | **Implementations** (or **Tools** | **Implementation Manager**) to open the **Implementation Manager** dialog.

3. Click the **Create New** button to open the **New Implementation Details** dialog.

4. You will see this screen. Check the pathway to the SIMS .net directory is correct.



5. Click **OK** to open the Create New Implementation dialog.



6. Enter a **Description**, eg Year 10 Sept 2019.

7. The **Effective Date** must match the start date of the student memberships of Base Bands in Year 10 (e.g. **01/09/2019**).

8. The **Membership End Date** should be the end of the Working Academic Year. (e.g. **31/07/2020**).

9. Click the **OK** button.

10. Click **Yes** to save the details.

11. Click **Select** to select the new **Year 10 Sept 2019** implementation.

NOTE: If you are setting up an Implementation for Year 9 students to start their new courses in June or July of Year 9 then the Effective Date should be the date the students will start their new courses and the end date should be **31/07/2020**.

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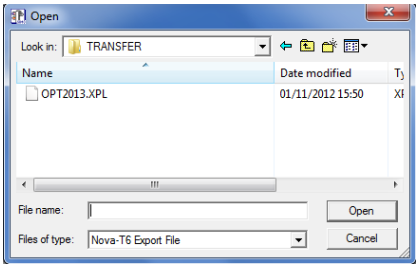
Importing the Curriculum into Options

Before importing the curriculum you should ensure that any new subjects for next year have been added to your Nova-T6 file. If you need to import a new subject later you will need to repeat the Import process.

1. **Open** Nova-T6.
2. Select the dataset you have created for next year's timetable.
3. Add in any new subjects that you are offering in September 2019 in **Plan** | **Subjects**.
4. Select **Data** | **Export to Nova-T4/Options**…
5. Name the file **OPT2019** and click **Sav**e.

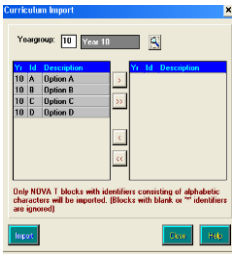
Note where the file has been saved, (usually S:\SIMS\SNOVA\TRANSFER).



6. In the Options module, select **File** | **Import** | **Curriculum from Nova-T6** or (**Tools** | **Transfers** | **Import Curriculum from Nova-T6**) to open the file selection window.
7. Navigate to **S:\SIMS\SNOVA\TRANSFER** and select the file **OPT2019.XPL**.
8. Click **Open** to open the Curriculum Import window.

By default, all blocks with letter identifiers in all years will be displayed.

9. If more blocks than those currently in Year 10 are displayed, you can set the filter to Year 10 by clicking the Field Browser button adjacent to the Year group field and selecting from the drop-down list.



10. Use the buttons in the centre of the chooser to select the required blocks (i.e. transfer to the right-hand panel).
11. Click the **Import** button to proceed with the import.

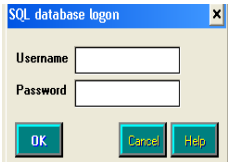
12. Click **Yes** to proceed.

13. Click **OK** to finish the import process.

Importing Students from SQL into Options

The students to be imported from SQL will include all students with appropriate band memberships. This will include Guest and Accepted students in addition to students on the current roll.

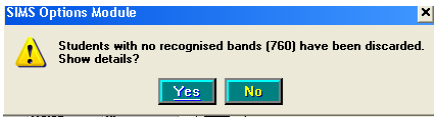
1. Select File | Import | Students (or Tools | Transfers | Import Students) to open the SQL Database Logon dialog.



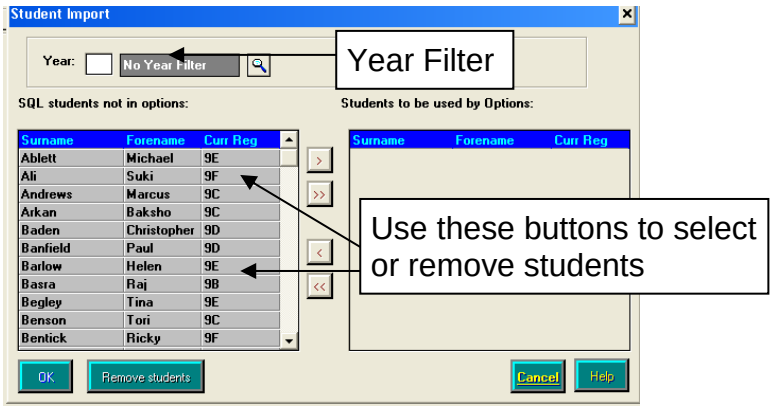
2. Enter a Username and Password of a Timetabler or Curricular Manager.

3. Click the **OK** button.

4. A message will be displayed reminding you that only students who have been assigned to a band will be displayed.



5. Click the **No** button to open the Student Import chooser.



6. If more students than those currently in Year 9 are displayed you can set the filter to Year 9 by clicking the **Field Browser** button adjacent to the Year field and selecting from the drop-down list.

7. Click **OK** if a filter has been applied.

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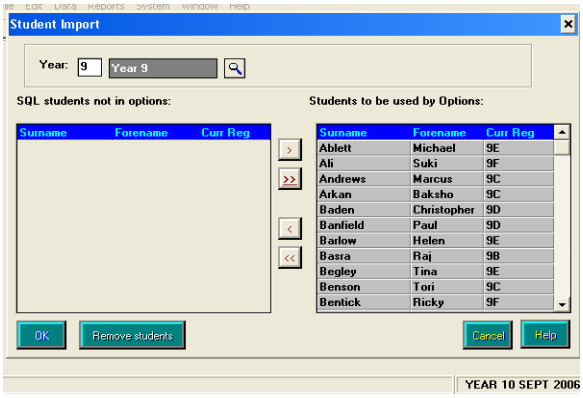
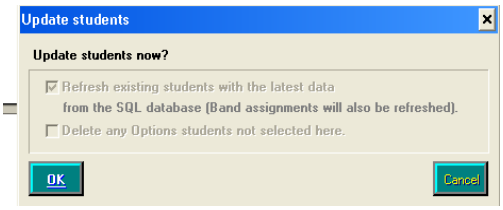


8. Having selected the required students to be used in Options (using the buttons in the centre of the chooser), click the **OK** button to confirm. The Update Students dialog will be displayed.



9. Click the **OK** button to complete the process.

10. You can now start to use the Options program to administer your Options process.

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Adding a new student to an implementation

To add a student to Options after you have started to use the implementation you need to add them to SIMS .net and then promote them up a year.

1. Open **SIMS .net**.

2. Select **Routines | School | Promotion** to open the **Setup Promotion Mapping** dialog. Validate Memberships will run. This may take some time.

3. Click the **Load** button to open the **Setup Promotion Mapping from Academic Year 2018/2019** dialog.

4. Click the **Finish** button.

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

6. Allocate the student to a band in the next academic year and then import them into the implementation in Options.

You can now work on your Options Implementation.

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Exporting Newly Created Classes from Options to Nova-T6. (Optional)

This process will transfer the newly created classes from Options into corresponding Option Blocks in Nova-T6.

Note: You do not have to do this as you may decide to set the blocks up manually in Nova-T6.

In OPTIONS

1. Select **File** | **Export MOD File to Nova-T6** or (**Tools** | **Transfers** | **Export MOD File to Nova-T6**).
2. Select the year to export.
3. Click **OK**.

This will save a file called Opt-Y10.MOD for a year 10 implementation.

4. Click **Save**.
5. Click **OK**.
6. **Open** your Nova-T6 timetable file.
7. On the Model Window select the year you have been doing options for.
8. Select **Model** | **Recall**.
9. Navigate to S:\SIMS\SNOVA\TRANSFER and select the file you saved in step 4. Click **Open**.
10. Select **No Attributes**.
11. Select **Merge Blocks in Base Bands**.
12. Click **OK**.

You will be told how many blocks have been loaded.

13. **Save** the file with a new name.

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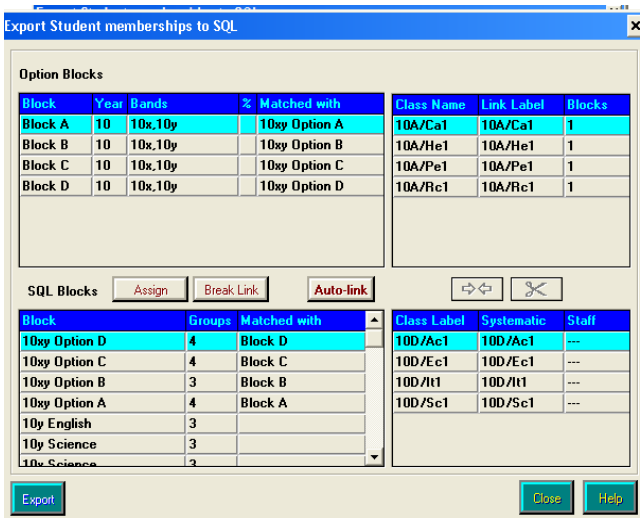
Exporting Student Data to SQL

1. Before this routine can be run the Timetabler must open **Nova-T6** and **Export the Curriculum and Timetable** for the Academic Year 2019/2020.

2. In **Options**, select **File | Export | Student Allocations** or (**Tools | Transfers | Export Student Allocations**) to open the SQL Database Logon dialog.

3. Enter your user name and password and click the **OK** button. The **Export Student memberships to SQL** dialog is displayed, although this will initially be disabled whilst class information is retrieved from the SQL database.



4. To allow Options to attempt to link corresponding blocks automatically, click the **Auto-link** button. This is the recommended option. The other options are required if Auto Link fails.

5. To link corresponding blocks, select the required **Options Block** from the top half of the dialog, then the corresponding **SQL Block** from the lower half of the dialog, then click the **Assign** button.

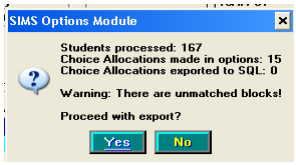
6. To break the link between corresponding blocks, repeat the process above, but click the **Break Link** button.

NOTE: An Option block can only be linked to one SQL block at a time, and vice versa. Attempts to associate a block that is already linked with a new block will break the previous link.

If the date range defined for the Options implementation lies outside the date range of the classes that were exported from Nova-T to SQL, the blocks will not match and the export will not run.

When you are satisfied with the associations made between the blocks in Options and the blocks in SQL, continue as follows:

7. Click the **Export** button to open the **SIMS Options Module** dialog, which displays information about the number of students being processed and possibly, a warning if there are any unlinked blocks.



8. Click the **Yes** button to proceed with the export. If you click the **No** button, you will be returned to the Export Student Membership dialog, where you can link any unlinked blocks before running the export procedure again.

9. Click **OK** to finish the Export process.

NOTE: If the Effective Date and Membership End Dates used in the implementation do not lie within the same Academic Year, an error message will be displayed, informing you that the date ranges do not match. You will need to adjust the dates via **Implementation Manager | Edit Details**, before exporting again.

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Summary of Processes Check List

This section provides a summary of all the previous processes listed in this document.

In SIMS:

- Create the new Academic year.
- Promote students.

In Options:

- Create Implementation.
- Use Options for your Options process.
- Export the newly created classes from Options to Nova-T6 (**File | Export | Curriculum**). (Optional).

In Nova T6:

- Export the Curriculum and Timetable to SQL (**Data | Export Curriculum and Timetable to SQL…**).

In Options:

- Export the student data to SQL (File | Export | Student Allocations).

If you require further advice or assistance with these processes please call the ICT Service Desk on 01438 844777, Option 1, Option 1.

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