

SIMS Learning Gateway 2

Introduction

Course Booklet - SLG2I-1-v10

Version 1.0



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Where appropriate for data entry purposes, the graphics used in this document match the training data recommended for use on the course. Where the graphic is an example of what might be expected when using certain areas of the software, the training data may not be an exact match.

This booklet is designed for use with SIMS software version 7.132

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SIMS Learning Gateway 2

Introduction

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Introduction



This section contains:

- Introduction to SIMS Learning Gateway 2
- Portal Model

Introduction to SIMS Learning Gateway 2

SIMS Learning Gateway 2 (SLG2) is an implementation of Microsoft® Windows SharePoint services (WSS3) and Microsoft® Office SharePoint Server (MOSS2007) technologies.

SharePoint allows code called web parts to be dropped into zones on a page to perform a certain task. Capita has designed web parts to surface data from your SIMS system and show the results to parents, students and teachers.

The initial layouts of the sites have been set at installation. The purpose of this training manual is to make you familiar with the tasks needed to maintain basic sites. Following a look at the **Student**, **Parent** and **Teacher** portals you will be introduced to the techniques needed to manage these sites.

This documentation concentrates on the SIMS-Capita web parts and their links to school databases (only the briefest introduction can be made here to general SharePoint web parts). It is important to realise that many other third party web parts are available on the Internet and that further general SharePoint training might be needed for SLG administrators.

Portal Model

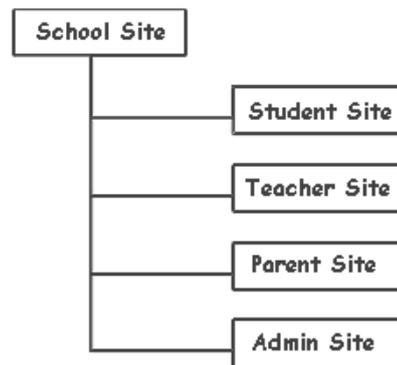
Each **School** site exists as part of a hierarchy of related sites on one of Capita's Hosted SLG2 installations. On a self hosted site, it should be a secure site of which the URL will be defined by the school; on a hosted site your site URL will be something like:

<https://hslg10.capita-cso.co.uk/schools/grab/slq>



NOTE: The text in bold will be personal to your school.

This is the typical basic set up for each school SLG2 site.



Sites have been automatically created for students, teachers, parents and admin. It is possible to create extra sites for other groups such as Governors, or perhaps specific departments created from the **Teachers** site, e.g. Science Dept etc. (see *Unit 07*).

Each of the three main sites (**Parents**, **Students** and **Teachers**) is a separate web site collection within the **School Home** site. Different links will be visible to different users based on their login ID, group membership and related permissions (see *Unit 09* for default detail).

There may be some common areas for notices, discussions etc.

As you define groups and apply permissions to group members, different people will be able to access different areas. Most of this user population and assignment of group permissions will happen automatically through Active Directory (AD) routines (see *Unit 05*) that are run by the school through SIMS.

SharePoint runs on web parts (special code to sit on a page and do a particular job). The function of each of the Capita web parts is described in the following unit.

01

The Capita Web Parts



This section contains:

- Logging in
 - The School Home Page
 - Web Parts Surfacing SIMS Data
 - Extra General Web Parts
-

SharePoint runs on web parts (special code designed to sit on a page and do a particular job). Some web parts provide an Announcement board functionality, some offer hyperlink lists, some provide Library storage capability. There are hundreds of general web parts available.

Capita has designed new web parts to sit within the general SharePoint environment and surface data from your SIMS system for students, parents and teachers.

The default range of this data is essentially the same for each group, though there are small differences which will be explained later.

Each view is controlled by its own switchboard so that a school can tailor different final views for each main group – see *Unit 2*.

From a user's login credentials the system knows to which main group they belong and also exactly who the user is according to their role(s) in the SIMS database. This means that data is very accurately targeted to individual users who only ever see data pertinent to themselves, their families or their classes.

Logging In

You will issue the site URL and probably put a link somewhere on your school web site and/or Intranet. When users follow the link they will be challenged for their SLG2 credentials:

CAPITA
CHILDREN'S SERVICES

Security ([hide explanation](#))

A This is a public or shared computer
Select this option if you are connecting from a public computer. Be sure to log off and close all browser windows to end your session. Read about the [security risks](#) of using a public computer.

This is a private computer
Select this option if you are the only person using this computer. This option provides additional time of inactivity before automatically logging you off.
Warning: By selecting this option you acknowledge that the computer complies with your organization's security policy.

B I want to change my password after logging on

C Username:
Password:

D

E © 2009 Capita Childrens Services ISA1. [Click Here](#) if you have forgotten your password.
[Click Here](#) for the Service Status Blog

Connect to w2k8-01

Connecting to w2k8-01.

User name:

Password:

Remember my password

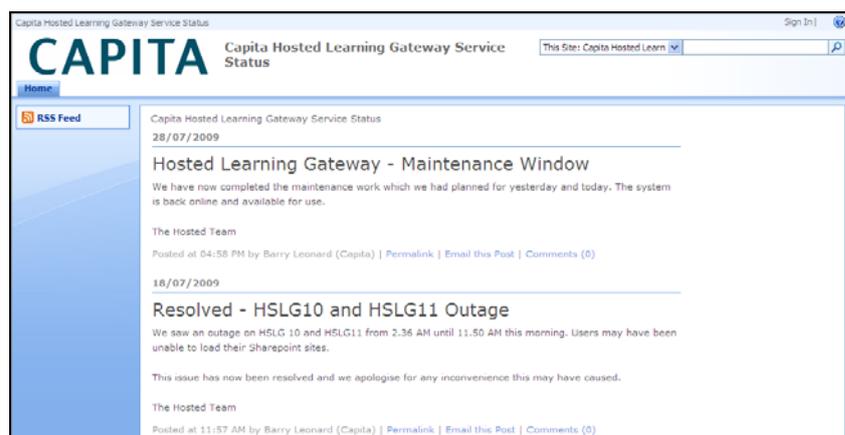
Capita Hosted SLG2 will see the top screen shown in the preceding graphics. This is because the system is in fact logging the user in via Microsoft ISA server. Any self hosted school which has ISA server would see a similar log in screen and the design of that screen, although the same for all hosted schools, can be designed individually for LAs or self hosted schools.

Schools which do not have ISA server will be asked for their credentials via the second of the two graphics above. In some cases you may need to put the domain name in front of the user id, such as GAB\userid.

- A Hosted SLG2 sites have a time-out and after a period of inactivity, you need to log in again to move to a new page. The time out period is significantly longer if you set the **Private Computer** radio button (several hours compared with only ten minutes for a public computer).
- B Users can force a password change after logging in – they can also visit an area called **My Account** to do this at any time later. On a hosted site it is set that the first time they ever log in they are forced to change their password in any case.
- C This is the main log-in panel on a hosted site.
- D Users can ask for a forgotten password to be reset: Note this functionality can also work on a self hosted site but needs to have been set up at install.

This requires a registered email address and a security question and answer previously stored in their **My Account** profile space.

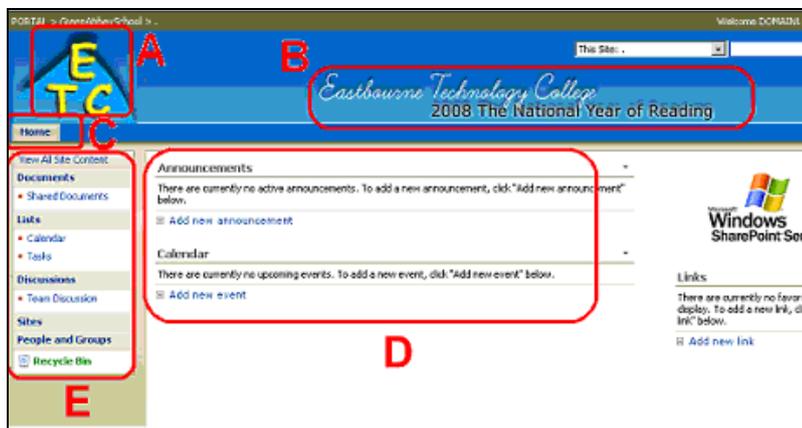
- E Users can view messages about the Hosted Service Status:



After success with their ID and password they will reach:

The School Home Page

Yours will eventually be personalised with your badges/colours etc.

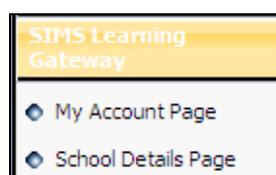


The key elements here are:

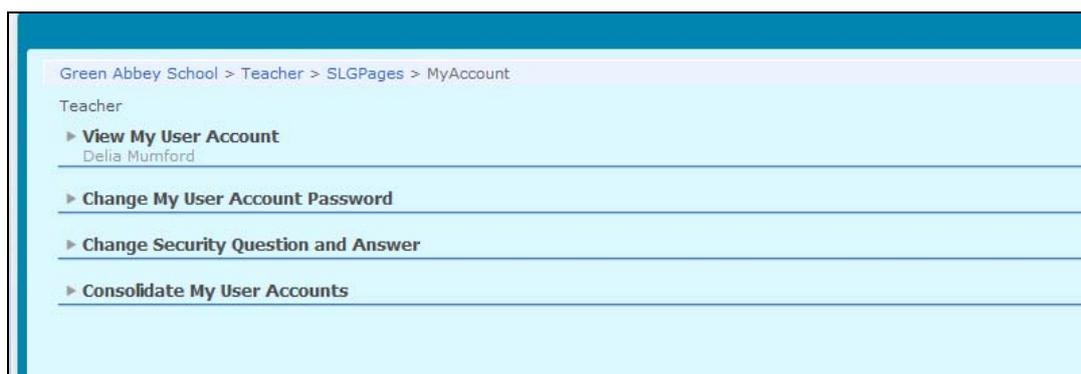
A - the site name and school badge.	B - a banner graphic.
C - tab links for other sites to which users have access.	D - Announcements and other items for everyone within the site.
E - The Quick Launch Area (QLA) showing general Microsoft libraries, and other Navigation indexes etc.	

Section E holds a SIMS Navigation web part which is slightly different for parents, students and teachers who obviously need access to different data from SIMS.

However the top two links of the SIMS Navigation web part are common to all users:



The **My Account** page stores information which the user can alter.



Each section can be expanded (using the little **grey triangle**) to show more detail:

View My User Account - Francis Abbot

First Name

Last Name

Address

Email Address

User Name

User Name (pre-Windows 2000)

Change My User Account Password

Your new password must comply with this site's Password Policy

Old Password

New Password

Confirm New Password

Change Security Question and Answer

This Security Question and Answer is used if you ever forget your password

Security Question

Security Answer

Consolidate My User Accounts

Enter the details of the User Account you wish to consolidate with the current one

User Name

Password

Schools may wish to hide the **View My User Account address** information on the students' page to protect vulnerable children.

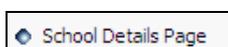
Users are normally allowed to **Change My Account Password**.

The **Change Security Question and Answer** are used in the forgotten password routine.

The Consolidate My User Account web part is not relevant for Hosted schools and may already have been hidden. On a self hosted school, this web part allows a user to merge or consolidate his newly created id from SLG, (i.e. using his role within SIMS), with his or her existing id in Active Directory used to log on to the network within school. If you wish to use it, this is the process:

You need to have an id for SLG created by using the SIMS routines described in *Chapter 5*, and use this id to log on just once to the Learning Gateway site. Go to the Consolidate My User Accounts web part and put in your original AD account id and password. Click the **Continue** button (not Enter). You will be asked to confirm this consolidation and then receive a message that it has been completed successfully. If you then log out you will then be able to log in again using your original AD account credentials and will have inherited the permissions from the, now disabled, SLG account. The disabled account will show as such with AD and although it can now quite safely be deleted, it is a good way of seeing which users have carried out this Consolidation routine.

The **School Details Page** button shows basic public information about the school, as held in SIMS.



School Details Page button

School Establishment Information - The HIGH School

School Name	<input type="text" value="The HIGH School"/>	
LA	<input type="text" value="000 City of London"/>	
Establishment Number	<input type="text" value="TST2"/>	
Unique Reference	<input type="text"/>	
School Phase	<input type="text" value="Secondary"/>	
School Type	<input type="text" value="Comprehensive all-thr"/>	
School Governance	<input type="text" value="Community"/>	
Intake Type	<input type="text" value="Comprehensive"/>	
Boarding Pupils	<input type="checkbox"/>	

The next section of the Navigation web part varies according to the user’s role:

- My Account Page
- School Details Page
- My Summary Page

My Children Dashboard

My Account Page

School Details Page

- My Account Page
- School Details Page
- Attendance Registers Page
- MarkSheet Page
- Profiles Page
- Student Search Page
- Staff Search Page

The preceding graphics show the links available to students, parents and teachers respectively.

There is also an **Administrator** site which will be dealt with later – see *Chapter 6*.

The key SIMS data located in the **My Summary** area for the student is the basis of what is shown to students, parents and teachers. Students access the data by clicking **My Summary**. Parents also have the **My Children Dashboard** page with key information about their children, but can then drill down for details about each child. Teachers must use the **Student Search** page first.

Web Parts Surfacing SIMS Data

The range of web parts surfacing SIMS data is similar for all three types of user, except that parents also see this **My Children Dashboard overview** page. School has control over the visibility of this default data – entire web parts can be hidden from view and some allow internal fine-tuning. They can be adjusted differently for each of the user groups, in other words you may want to allow teachers to see some items of information but not parents or students.

This is the default set on what is known as the **Student Summary** page:

Green Abbey School > Teacher > SLGPages > StudentSummary

Teacher

- ▶ **Student Basic Information**
David Abbey
- ▶ **Student Session Attendance Summary**
David Abbey
- ▶ **Student Lesson Attendance Summary**
David Abbey
- ▶ **Student Conduct Summary**
David Abbey
- ▶ **Student Assessment Summary**
David Abbey
- ▶ **Student Classes**
David Abbey

Each web part can be expanded by clicking the **grey triangle** in the top left corner.

Student Basic Information

Student Basic Information - Ben Abbot

Legal Forename	<input type="text" value="Benjamin"/>	
Middle Name(s)	<input type="text" value="Michael"/>	
Legal Surname	<input type="text" value="Abbot"/>	
Preferred Surname	<input type="text" value="Abbot"/>	
Preferred Forename	<input type="text" value="Ben"/>	
Date of Birth	<input type="text" value="12/07/1993"/>	
Age	<input type="text" value="14 years, 8 months"/>	
Gender	<input type="text" value="Male"/>	
Birth Certificate Seen	<input checked="" type="checkbox"/>	

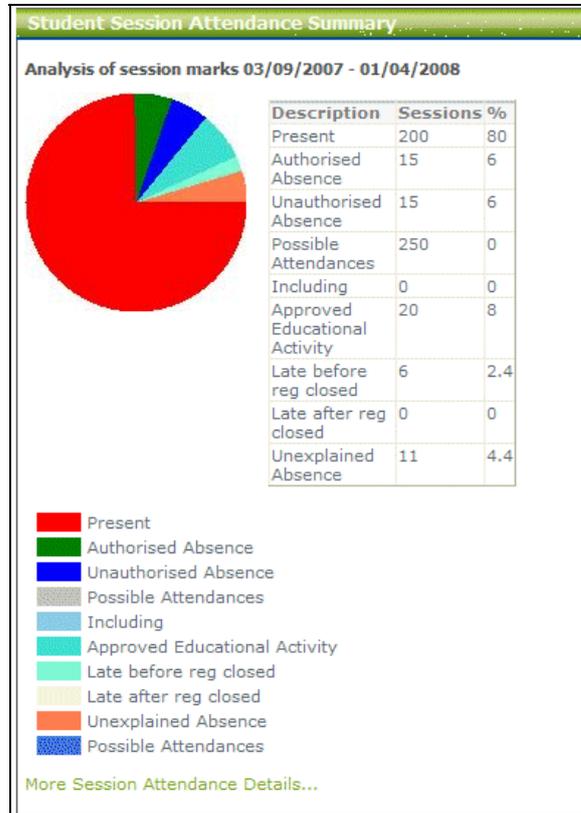
[More Student Details...](#)

sim supporting school

Student Session Attendance Summary

This data does not include today's marks it summarises to yesterday.

This summary is for the statutory Attendance marks (AM/PM registers).



More Session Attendance Details:

Student Session Attendance Details - Ben Abbot

End Date: 03/04/2008

Week View Month View

Month	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M																
September 2007								XX	^	^	^	^	/L	##	##	^	^	^	II	L	##	##	^	^	^	^	^	##	##	^	^	II	^	^	##	##		
October 2007	^	^	^	^	MM	##	##	^	^	^	^	^	##	##	^	^	^	^	XX	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##		
November 2007			^	^		##	##	^	^	^	^	^	##	##	^	^	^	^	##	##	NN	NN	NN	XX	##	##	##	##	##	##	##	##	##	##	##	##		
December 2007						##	##	WW	WW	WW	WW	WW	##	##	^	^	^	^	##	##	^	GG	GG	##	##	##	##	##	##	##	##	##	##	##	##	##		
January 2008			##	##	^	^	##	##	^	^	L	^	/C	##	##	^	^	^	/S	##	##	XX	^	^	^	/I	##	##	##	##	##	##	##	##	##	##		
February 2008				^		##	##	^	^	YY	L	^	/C	##	##	^	^	^	^	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	
March 2008						##	##	^	^	^	^	^	/N	##	##	^	^	^	^	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	
April 2008			--	--	--	--	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##
May 2008							##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##
June 2008							##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##
July 2008			--	--	--	--	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##
August 2008						##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##	##
September 2008	##																																					

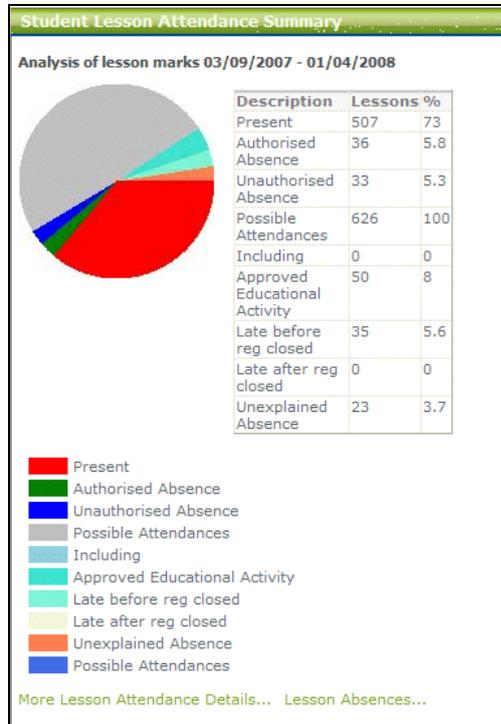
Session code totals 03/09/2007 - 03/04/2008

Code	Description	Sessions	%
/	Present (AM)	89	35
\	Present (PM)	85	33.5
C	Other authorised circumstances	1	0.4
G	Family holiday (Not agreed)	4	1.6
I	Illness (not med/dental appoints)	9	3.5
L	Late (before reg closed)	6	2.4
M	Medical/Dental appointments	3	1.2
N	No reason yet provided for absence	11	4.3
S	Study leave	2	0.8
W	Work experience	20	7.9
-	All should attend / No mark recorded	24	9.4

This view does include today's registers.

Student Lesson Attendance Summary (Needs Lesson Monitor Licensed)

This data does not include today's marks it summarises to yesterday.



More Lesson Attendance Details/Lesson Absences

Student Lesson Attendance Details - Clarissa Abbot											
End Date	03/04/2008			Refresh							
Page	31										
Date	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Period 2	Period 3	Period 4	Period 5
Monday 31/03/2008	30	31	1	2	3	4	5	Music MUS Attendance mark -	History Humanities Room 6 Attendance mark -	English English Room 4 Attendance mark -	Science Science Lab 5 Attendance mark -
Tuesday 01/04/2008	6	7	8	9	10	11	12	Technology Technology 4 Attendance mark -	English English Room 4 Attendance mark -	Physical Ed Playing Fields Attendance mark -	French Language Room 3 Attendance mark -
Wednesday 02/04/2008	13	14	15	16	17	18	19	English English Room 4 Attendance mark -	Science Science Lab 5 Attendance mark -	Science Science Lab 5 Attendance mark -	Technology Technology 4 Attendance mark -
Thursday 03/04/2008	20	21	22	23	24	25	26	French Language Room 3 Attendance mark -	Physical Ed Playing Fields Attendance mark -	Mathematics Maths Room 2 Attendance mark -	PSE Science Lab 9 Attendance mark -
Friday 04/04/2008	27	28	29	30	1	2	3	Mathematics Maths Room 2 Attendance mark -	Geography Humanities Room 5 Attendance mark -	English English Room 4 Attendance mark -	MUSIC MUS Attendance mark -
Saturday 05/04/2008	4	5	6	7	8	9	10				Humanities Room 7 Attendance mark -
Sunday 06/04/2008	Today			Clear							

Student Lesson Absences - Ben Abbot							
From	03/09/2007			To	31/03/2008		Refresh
Type of Absence							
<input checked="" type="checkbox"/> Include Authorised Absences							
<input checked="" type="checkbox"/> Include Unauthorised Absences							
<input type="checkbox"/> Include only Post-Registration Absences							
Name	Reg	Total	Period	Class	Mark		
Totals for Individual Students							
0 Missing marks have been ignored							

These views do include today's registers.

Student Conduct Summary

This shows data from the SIMS Achievement and Behaviour modules.

Student Conduct Summary - Ben Abbot					
Academic Year 200		Refresh			
Achievements - Total Points 5					
Page << 1 of 1 >>		Items per page 10	Displaying 1-5 of 5 items		
Date	Type	Points	Comments	Award	Award Date
16/10/2007	Sporting Representation	1	Selected for county 15		
10/10/2007	Sporting Representation	1	Attended rugby trial		
21/09/2007	Excellent Effort	1	Tried very hard to use excel formulae	Positive Referral	21/09/2007
14/09/2007	Outstanding Work	1	Excellent problem solving	Merit	14/09/2007
11/09/2007	Outstanding Work	1	Very accurate scale drawing of school building with precise calculations on area	Merit	11/09/2007

Behaviour - Total Points 4					
Page << 1 of 1 >>		Items per page 10	Displaying 1-4 of 4 items		
Date	Type	Points	Comments	Action	Action Date
08/11/2007	Defiance	1	Refused 3 to move away from parked cars	Daily Report	09/11/2007
29/10/2007	Persistent Lateness to Lessons	1	Lateness	Detention	30/10/2007
20/09/2007	Smoking	1	Smoking in Boys toilet at break	Letter to Parent/Guardian	20/09/2007
13/09/2007	Lunch Time Incident	1	Left dinner tray and refused to clear it away claiming it wasn't his	Refer to Form Teacher	13/09/2007

Any column can be hidden if necessary.

Student Assessment Summary

This shows data from SIMS Assessment module.

Student Assessment Summary - Ben Abbot					
From	01/04/2007	To	01/04/2008	Refresh	
Page << 1 of 2 >>		Items per page 10	Displaying 1-10 of 11 items		
Assessment	Description	Result	Notes	Date Achieved	
No A* - C	Mock Exams	8.00	Result Range 0 - 100	08/02/2008	
Validate 5+ A* - C	Mock Exams	Y		08/02/2008	
Validate 5+ A* - C En Ma	Mock Exams	Y		08/02/2008	
Art GCSE	Mock Exams	D	Grade D	06/12/2007	
Eng GCSE	Mock Exams	B	Grade B	06/12/2007	
Engl Lit GCSE	Mock Exams	A	Grade A	06/12/2007	
French GCSE	Mock Exams	C	Grade C	06/12/2007	
Geography GCSE	Mock Exams	C	Grade C	06/12/2007	
Maths GCSE	Mock Exams	C	Grade C	06/12/2007	
Science GCSE Double	Mock Exams	C	Grade C	06/12/2007	

Results are not visible to parents or students until a check box in the **Template** area of SIMS Assessment has been activated – see later.

Student Classes

The data shown here depends on the Timetabling routines in SIMS/Nova.

Student Classes - Ben Abbot				
Effective Date	01/04/2008		Refresh	
Time	Class Name	Subject	Teacher	Room
09:15	10A/Re1	Religious Ed	Miss B. Patel	Humanities Room 3
10:15	10x/Hi2	History	Mrs E. Paton	Humanities Room 4
11:35	10x/Ma1	Mathematics	Mrs L. Vernon	Maths Room 1
12:35	10x/Fr2	French	Mr M. Konchalski	Language Room 3
14:30	10x/Sc1	Science	Dr S. Miandad	Science lab 3

Student Timetable...

10A/Re1 – links to the names of class members, this can be disabled – see *Unit 3*.

Student Class Members Details					
Effective Date	02/04/2008		Refresh		
Group Name	8x/Ma2	Supervisor	Mrs D. Mumford		
Group Type	Class				
Page	1 of 3	Items per page	10	Displaying 1-10 of 30 items	
Surname	Forname	Year	Reg Group	Admission Number	
Abbot	Clarissa	8	8A	003100	
Abu-Koash	Frederik	8	8C	003102	
Adair	Geoffrey	8	8B	003103	
Akhtar	Rahana	8	8B	003114	
Antas	Sergei	8	8B	003126	
Arkle	Robin	8	8B	003128	
Austyn	Lucy	8	8B	003133	
Bailey	Alistair	8	8B	003136	
Bent	Hal	8	8C	003149	
Bond	Gloria	8	8B	003153	

Student Timetable

Student Timetable									
New	Actions								
←	31 March - 06 April 2008						Day	Week	Month
	31 Monday	1 Tuesday	2 Wednesday	3 Thursday	4 Friday	5 Saturday	6 Sunday		
7									
8									
9	09:15 Mon:1 - Physical Ed - RD - SH2	09:15 Tue:1 - Religious Ed - RPA - H3	09:15 Wed:1 - Religious Ed - BPA - H3	09:15 Thu:1 - Physical Ed - RD - SH2	09:15 Fri:1 - Art - KB - A3				
10	10:15 Mon:2 - Statistics - LV - M4	10:15 Tue:2 - History - EP - H4	10:15 Wed:2 - Religious Ed - BPA - H3	10:15 Thu:2 - English - JA - E5	10:15 Fri:2 - Art - KB - A3				
11									
12	11:35 Mon:3 - English - JA - E5	11:35 Tue:3 - Mathematics - LV - M1	11:35 Wed:3 - Science - SM - S3	11:35 Thu:3 - French - MK - L3	11:35 Fri:3 - Mathematics - LV - M4				
13	12:35 Mon:4 - History - EP - H4	12:35 Tue:4 - French - MK - L3	12:35 Wed:4 - Science - SM - S3	12:35 Thu:4 - Science - SM - S3	12:35 Fri:4 - English - JA - E5				
14									
15	14:30 Mon:5 - Art - KB - A3	14:30 Tue:5 - Science - SM - S3	14:30 Wed:5 - History - EP - H4	14:30 Thu:5 - PSE - RM - L4	14:30 Fri:5 - French - MK - L3				

Extra General Web Parts

Users can click the link on the **Student Summary** page (top web part) and go to the **Student Details** page, where you will see more details about the student selected.

▶ Student Basic Information
▶ Student Session Attendance Summary
▶ Student Lesson Attendance Summary
▶ Student Conduct Summary
▶ Student Assessment Summary
▶ Student Classes

Each section can be expanded or collapsed by clicking the **grey triangle** in its top left corner.

Student Registration Information

Teacher
 ▼ **Student Registration Information**
 David Abbey

Registration Group	9F	House	
Year Group	Year 9	Year Taught In	Curriculum Year 9
Enrolment Status	Single Registration	Boarder Status	
Admission Date	03/09/2007	Admission Number	003269
Former UPN		Attendance Mode	All day
UPN	P820432106006	Local UPN	

Part Time Details:

Start Date	End Date
------------	----------

Student Address Information

▼ **Student Address Information**
 David Abbey

Current Home Address Details (Not Validated)

17 Paulsfield Drive
 Wirral
 United Kingdom

Student Telephone and Email Information

▼ **Student Telephone and Email Information**
 David Abbey

Telephone/Fax Numbers:

Device	Location	Telephone Number	Main	Notes

Email Addresses:

Location	Main	Email Address	Notes

Student Family Home Information (not Visible to Students)

▼ **Student Family Home Information**
David Abbey

Contacts:

Is Home Address	Priority	Name	Relationship	Court Order	Telephone	Location
Yes	1	Abbey, David	Father	No		
No	2	Abbey, Mrs Emma	Mother	No		

Parental Salutation Parental Addressee

Mailing Point

Family Links:

Name	Date of Birth	Year	Reg	Gender	Date of Admission	Date of Leaving	Status

Teachers see a list of all contacts here. A parent would see their own name only. Clicking a link in the **Contacts** section leads to the page called **Student Contacts**. Each section can be expanded by clicking the **grey triangle** in its top left corner.

Green Abbey School > Teacher > SLGPages > StudentContacts

Teacher

- ▶ **Student Contact Basic Information**
David Abbey
- ▶ **Student Contact Address**
David Abbey
- ▶ **Student Contact Telephone and Email**
David Abbey
- ▶ **Student Contact Relationship Information**
David Abbey
- ▶ **Student Contact Language Information**
David Abbey
- ▶ **Student Contact Employment Information**
David Abbey

▼ **Student Contact Basic Information**
David Abbey

Title	<input type="text"/>	Gender	<input type="text" value="Male"/>
Forename	<input type="text" value="David"/>	Honours	<input type="text"/>
Middle Name(s)	<input type="text"/>	Parental Ballot	<input checked="" type="checkbox"/>
Surname	<input type="text" value="Abbey"/>	Addressee	<input type="text" value="Mr J Abbey"/>
Salutation	<input type="text" value="Mr J Abbey"/>		

▼ **Student Contact Address**
David Abbey

Current Home Address Details (Not Validated)

17 Paulsfield Drive
Wirral
United Kingdom

▼ **Student Contact Telephone and Email**
David Abbey

Telephone/Fax Numbers:

Device	Location	Telephone Number	Daytime Number	Notes

Email Addresses:

Location	Main	Email Address	Notes

▼ **Student Contact Relationship Information**
David Abbey

Student: Contact Type:

Correspondence: Priority:

Pupil Report: Court Order:

Parental Responsibility:

▼ **Student Contact Language Information**
David Abbey

First Language: Translator Required:

▼ **Student Contact Employment Information**
David Abbey

Place of Work: Job Title:

Occupation:

Student Medical Information

▼ **Student Medical Information**
David Abbey

Emergency Consent: NHS Number:

Dietary Needs:
Dietary Need:

Paramedical Support:
Paramedical Support:

Medical Practices:

Medical Practice	Address	Telephone

Medical Notes:
Summary:

Medical Conditions:

Description	Information Received On

Medical Events:

Description	Type	Date	Follow Up Date

Student Ethnic Cultural Information

▼ **Student Ethnic Cultural Information**
David Abbey

Ethnicity Ethnic Data Source

Home Language Religion

First Language English Additional

Asylum Status Traveller Status

National Identity Speaks Welsh

Nationalities:

Nationality	Passport Number	Passport Expiry Date

Student Additional Information

▼ **Student Additional Information**
David Abbey

Meals Recoupment

Modes of Travel Connexions Assent Connexions Assent Ref.

Uniform Allowance Route

LA Provided Transport

Eligible for Free Transport:

Start Date	End Date

Eligible for Free Meals:

Start Date	End Date
03/09/2007	

Linked Agencies:

Agency Name	Address	Telephone

Linked Agents:

Name	Address	Relation Type

Student School History Information

▼ **Student School History Information**
David Abbey

Date of Leaving Reason for Leaving

Destination after Leaving

Previous Schools:

School	Date of Arrival	Date of Leaving	Reason for Leaving	Enrolment Mode

CTF Attendance

Year	School	Possible	Attended	Authorised	Unauthorised

Student Special Educational Needs Information

SEN Summary Information			
SEN Status:			
Date	Summary		
02/03/2010	Changed to: A - School/Early Years Action.		
Current Reviews:			
Date	Type	Time	Summary
02/03/2010	Annual	11:23	Venue : Green Abbey School, Status : Planned
Reviews History			
Current Provisions:			
Date	Type	Summary	
09/04/2010	Time in SEN Unit	Frequency : Frequency comment, Comments : This is a comment	
Provisions History			
Future SEN Events:			
Date	Type	Summary	
09/04/2010	Behaviour Modification Therapist	Comments : this is a comment	
Events History			
Statement Request:			
Request Date	Summary		
09/04/2010	this is a comment		

In addition, the parent has an **Overview Dashboard** page, shown in the following graphic.

LATEST EVENTS | Elizabeth: 16th May – School Closed for Elections

HEADLINERS

ATTENDANCE
since 13/04/09

100%

JAMES

TODAY'S LESSON

Robin	James	Elizabeth
Music	<input checked="" type="checkbox"/>	Mathematics
English	<input checked="" type="checkbox"/>	Music
Science	<input checked="" type="checkbox"/>	English
PE	<input checked="" type="checkbox"/>	Geography
(More Details...)		Science
		PE

EVENTS

Date Range: Dec 28, 2009 to Jan 27, 2010 | Show for: --Show All-- | [Go](#)

Behaviour Incident
Type: Fighting

Following disrupted cricket match during lesson, arguments continued in the changing room leading to a fight ([More...](#))

Created 18/01/2010

10 Minutes Late to Mathematics
When: 02/02/2010

James was 10 minutes late to Mathematics on Tuesday morning.

Created 18/01/2010

Achievement
Type: Outstanding Work

Five consecutive 'A' grades for homework.

Created 18/01/2010

[<](#) [>](#) ([View All](#))

LINKS

JAMES

[Student Record](#)

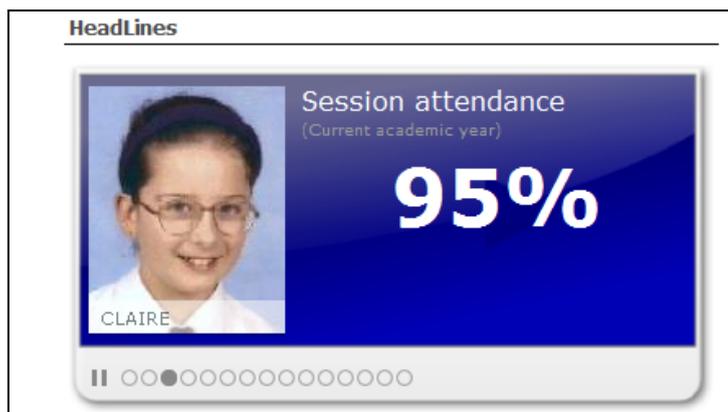
ROBIN

[Student Record](#)

ELIZABETH

[Student Record](#)

The **Dashboard** view gives the parent the latest available information about his or her children, but the parent can then drill down using the [Student Record](#) link to get the same information as shown to the other users.



The Headlines web part scrolls between various key items of data for all of the children for whom the contact has parental responsibility at the school, including attendance, achievement and behaviour and key performance indicators from SIMS Assessment. You can choose which you want to show.

The Today's Lesson web part shows a table of lesson attendance for three students: Robin, James, and Elizabeth. The table has columns for each student and rows for different subjects. Checkmarks indicate attendance, and an 'X' indicates absence. A '(More Details...)' link is provided at the bottom.

	Robin	James	Elizabeth
Music	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
English	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Science	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>

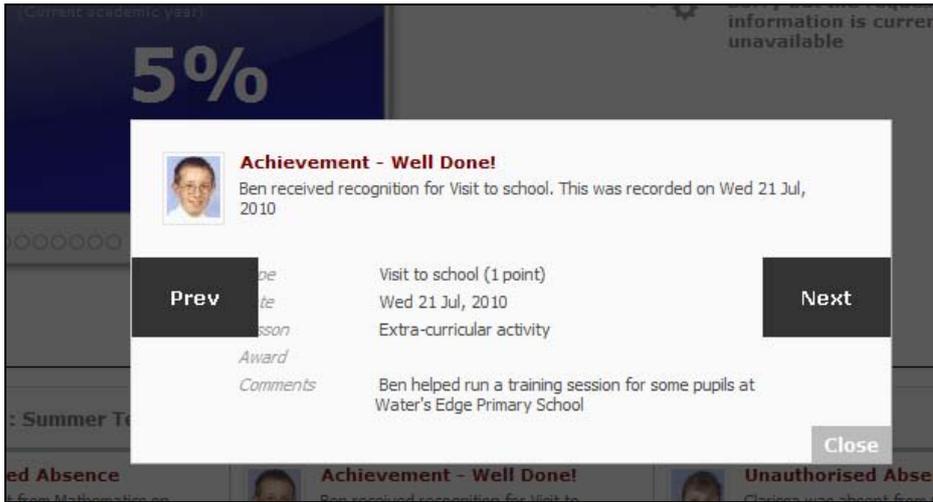
(More Details...)

The Today's Attendance web part allows you to choose whether to show just today's AM and PM marks, or each lesson. The Autumn release will allow you to drill down from this screen for more details.

The Events web part displays a list of 'Unauthorised Absence' events. The events are shown in a grid format, each with a small portrait of the student, the date, and a 'More Details...' link. The events are filtered by 'Summer Term'.

Event	Date	Action
Ben was absent from Art on Fri 23 Jul, 2010	Fri 23 Jul, 2010	More Details...
Clarissa was absent from History on Fri 23 Jul, 2010	Fri 23 Jul, 2010	More Details...
Ben was absent from Physics on Thu 22 Jul, 2010	Thu 22 Jul, 2010	More Details...

The Events web part allows you to choose from a selection of types of event, which have happened recently, by default in the last seven days, although the user can define the date range by clicking the **Binoculars** tool. The user can also scroll left and right to more events using the **arrow** tool. To see more details, just click the link, to see a screen similar to this:



The My Children Links web part shows a small picture of each of the children for which the contact has parental responsibility and then gives a link to the same **Student Summary** page discussed previously.

The visibility of each web part can be controlled independently for each user group. Some of the Capita web parts have internal controls as well.

Using these controls to tailor the views of students, parents and teachers is dealt with in *Unit 2*.

02

Controlling the Capita Web Parts



This section contains:

- Introduction
- Close, Delete and Hide on Page
- Internal Fine Tuning

Introduction

The school will almost certainly wish to hide at least some of the data available about each student to at least some of the possible user roles. What to show and what not to show are key decisions in the implementation of Learning Gateway. The data displayed to users via Learning Gateway is obviously only as good as that which exists in SIMS, so much of the decision making as to how to ensure complete and accurate data will be done in SIMS. Nevertheless, whether or not the data in SIMS is quite as good as you would like it to be, you can also choose to remove all or part of each web part via the Learning Gateway.

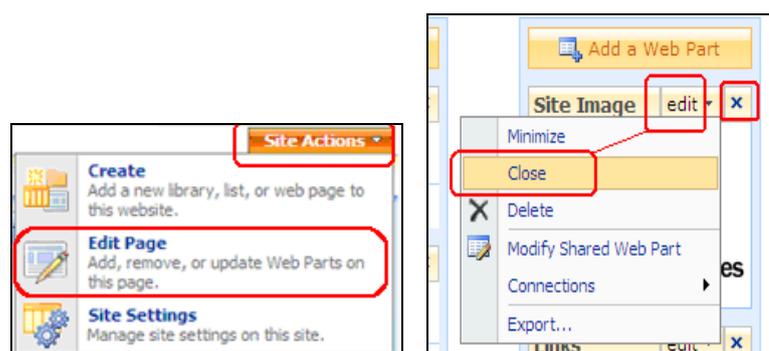
The Capita web parts can be controlled in two different ways:

- By removing them from the page in one of three ways
- Internal fine tuning.

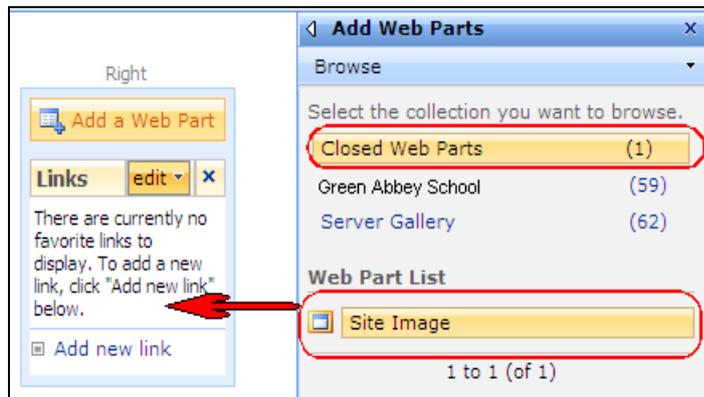
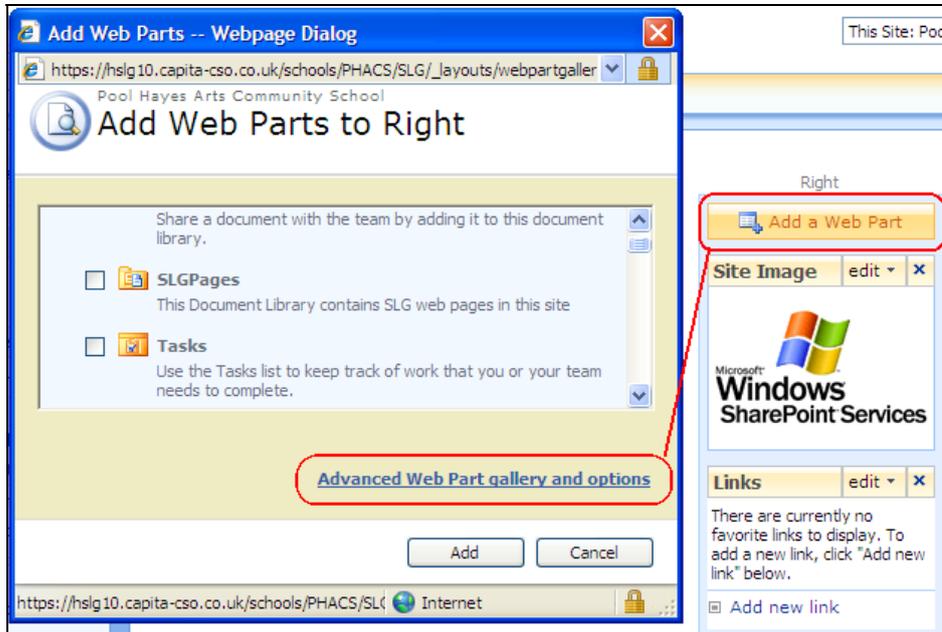
Close, Delete and Hide on Page

In general you should never delete or close the Capita web parts, if you do then we cannot guarantee that you can replace them successfully. Often, the Capita web parts work in a hierarchy with others, and require special code to be run to link them all together. Deleting a Capita web part often breaks these links. Capita can replace them for you, but you would be charged.

An administrator might accidentally close a web part by selecting **Site Actions | Edit Page** after which they click the **small Close cross** or select **Edit | Close**.

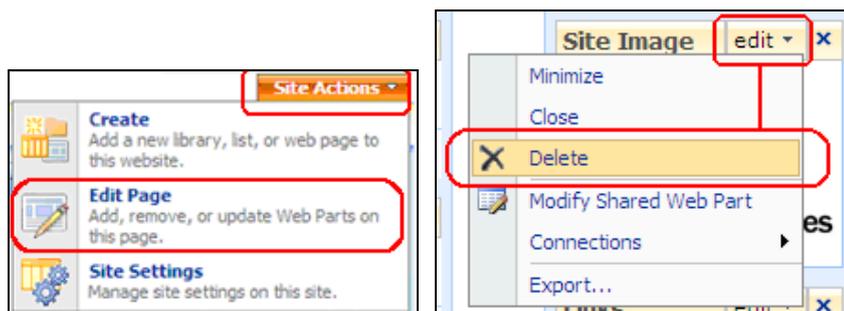


If a web part is closed it is sent to a temporary store area which an administrator can access by selecting **Site Actions | Edit Page | Add Web Part | Advanced Web Part Gallery** and **Options | Closed Web Parts**, from where it can be dragged back into one of the main SharePoint zones.

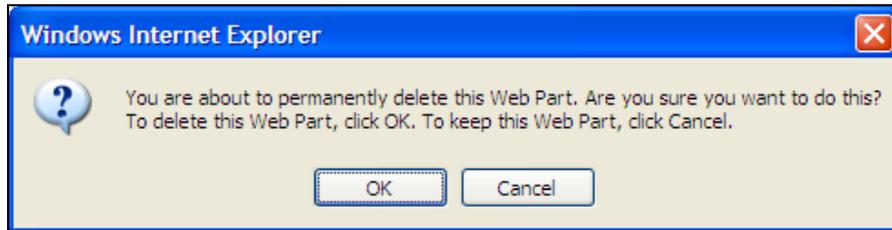


Closed web parts returned to a zone usually remember their internal settings.

Web parts can be deleted by selecting **Site Actions | Edit Page** and then **Edit | Delete**:



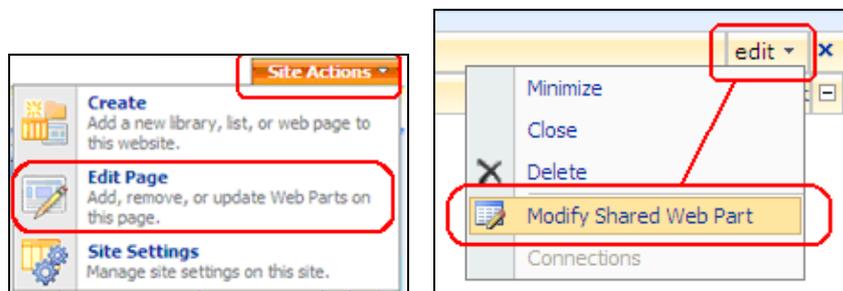
As this is a more drastic action than clicking the **Close** button, you are warned:



If you continue the web part is deleted. You might find a new copy in one of the web part Galleries, but it will have to have any internal setting replaced manually.

If there are Capita web parts you do not wish users to see, the technique to use is a standard Microsoft one called **Hide on Page**. This leaves the web part in place, invisible to the normal user; it can also be very easily re-shown when necessary. This would be the normal way advised to remove Capita web parts from the page that you may wish to put back later. The only exception to this is where the web part to be removed contains data in plain text, such as if you wished to remove the Student Address web part. If hidden, even though the user cannot then see it, the information contained therein is still on the page and can be found by using the view source option in Internet Explorer. Whilst this would not be a problem for items such as attendance pie charts where the data would make no sense in this form, plain data such as addresses would be discernable via this route. In this case we advise that the close web part option be used.

Select **Site Actions | Edit Page** to enter **Edit** mode and then select **Edit | Modify Shared Web Part**:

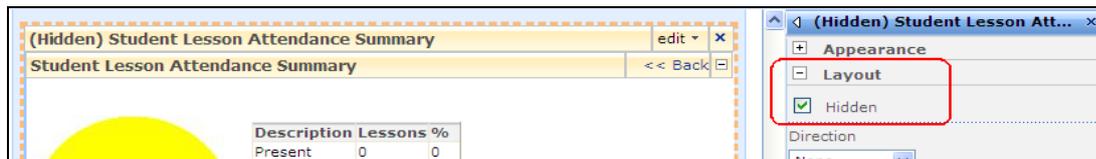


A **Control** column displays allowing several adjustments, three of which are common to every web part in the world:



Every web part has sections labelled **Appearance**, **Layout** and **Advanced**; the Capita web parts have an extra section labelled **SIMS Learning Gateway Web Part Properties** or something similar – see next section called *Internal Fine Tuning*.

The **Hide on Page** technique needs you to open the **Layout** section and select the **Hidden** check box, then click the **Apply** button or the **OK** button:



As an administrator you will see the word (Hidden) as your reassurance that the web part still exists on the page, but cannot be seen. To the user, the web part is simply invisible.

To show a web part again, simply deselect the **Hidden** check box.

The Capita web parts occur separately on each of the **Teacher**, **Parent** and **Student** sites and will need to be removed using the separate **Layout** and **Hidden** switches on each site. A school can decide to use **Hide on Page** for the **Teacher** view, but what they can see is also controlled from within SIMS and automatically reflects any extra restrictions imposed by SIMS system managers on say the SIMS group Class Teacher (see *Unit 5*).

Internal Fine Tuning

All Capita web parts have an extra control section labelled **SIMS Learning Gateway Web Part Properties** or similar wording. Sometimes crucial fine tuning can be achieved by altering the properties of the web part in this section.

The exact details vary from web part to web part and this example shows the Conduct web part:

 A screenshot of the 'Web Part Properties' dialog box for the Conduct web part. It includes a 'Publish From Date' field with the value '01/01/0001 00:00:00'. Below this are several checkboxes: 'Show student behaviour' (checked), 'Show student achievements' (checked), 'Auto Load Details' (unchecked), 'Show Sub Title' (checked), and 'Enable Collapsing' (checked). At the bottom, there is a 'Webpart Links' field.

Here, deselecting the **Show student behaviour** check box leaves only the Achievement data visible to the user. We will return to this in more detail soon.

There are several sets of pages containing Capita web parts which might require fine tuning. In each case, the bolded text in the example hosted URLs given in the following section will need adjusting for your school, however the ordinary text is always the same. Note that some installations use a singular label for student, parent and teacher, while others use the plural students, parents and teachers check yours carefully.

Student Summary Page

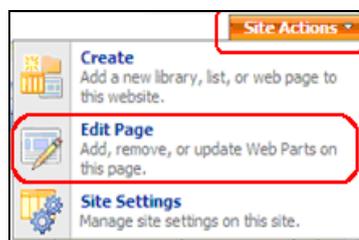
<https://hslg10.capita-cso.co.uk/schools/grab/Students/SLGPages/StudentSummary.aspx>

<https://hslg10.capita-cso.co.uk/schools/grab/Parents/SLGPages/StudentSummary.aspx>

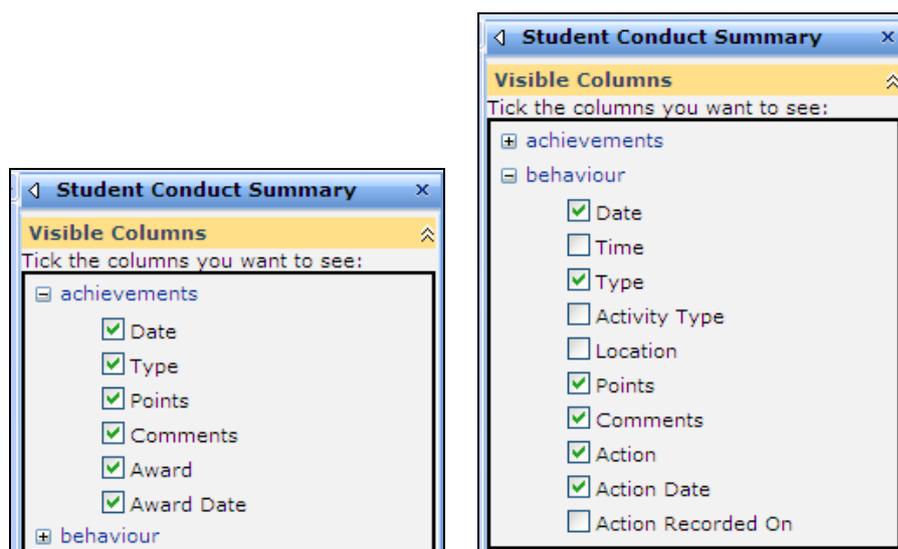
<https://hslg10.capita-cso.co.uk/schools/grab/Teachers/SLGPages/StudentSummary.aspx>

(Student, parent and teacher perspectives. The above would be typical URLs for a hosted school).

- First, select **Site Actions | Edit Page** to gain edit control over the page:

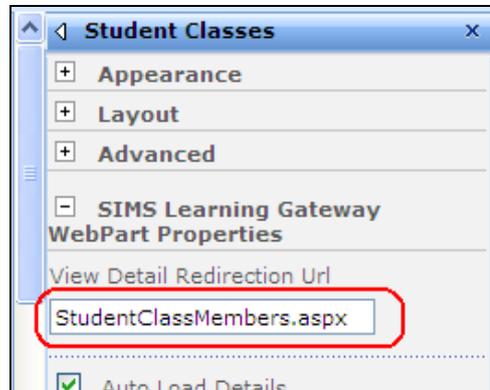


- Schools without the Lesson Monitor licence will need to use **Hide on Page** for each perspective on the web part Student Lesson Attendance Summary
- Schools may wish to use **Hide on Page** for the Student Conduct web part. Alternatively they may wish to use the **Internal Fine Tuning** technique to set a publication date, before which no events entered in SIMS will show, or to hide or show only one of the sections (Behaviour vs. Achievement), or they may wish to use **Internal Fine Tuning** to hide certain of the columns visible in each section by deselecting the relevant check box:

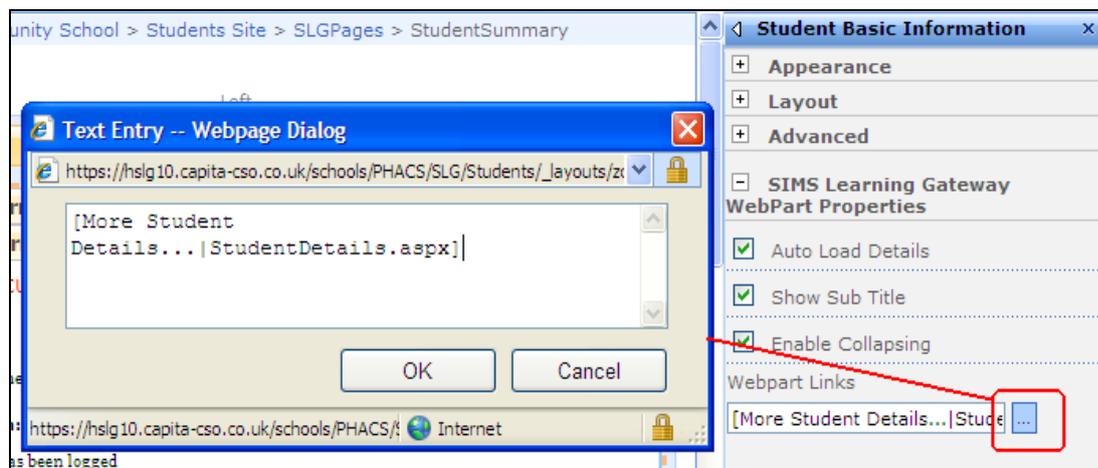


Note, the publication of a behaviour event can also be controlled within SIMS itself, (see *chapter 4*), using the **Behaviour Status** within the **Behaviour Incident** screen.

- For parents at least, schools will probably wish to break the link on the Class Members web part leading to the **Class Members name list** page. This is achieved by expanding the **SIMS Learning Gateway Web Part Properties** section and deleting the **StudentClassMembers.aspx** file information. With this field blank the link simply refreshes the **Summary** page.

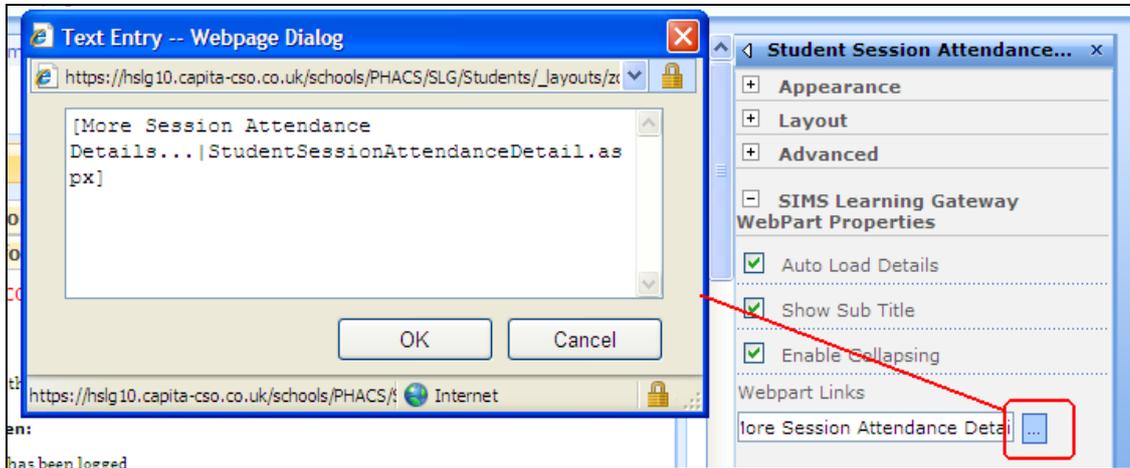


- Schools may wish to break the links to **Greater Detail** on the web part labelled **Student Basic Information**. This is achieved by expanding the **SIMS Learning Gateway Web Part Properties** section and deleting the text in the **Web part Links** field. Click in the field to display a **small box with dots in it** – this is shown in the following graphic.



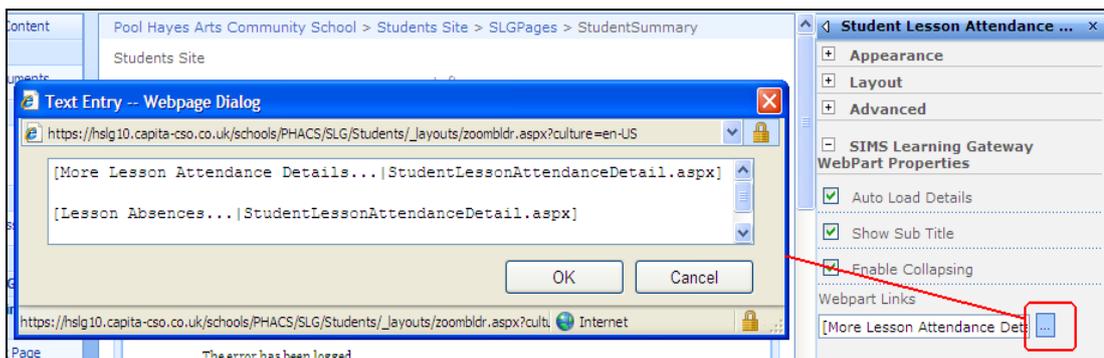
[More Student Details...|StudentDetails.aspx]

- Schools may wish to break the links to **More Sessions Attendance Details** on the Student Attendance Summary web part. This is achieved using **Site Actions | Edit Page** followed by expanding the **SIMS Learning Gateway Web Part Properties** section and deleting the text in the **Web Part Links** text box. Click in the field to display a **small box with dots in it** – this is shown in the following graphic.



[More Session Attendance Details...|StudentSessionAttendanceDetail.aspx]

- Schools may wish to break the links to **More Lesson Attendance Details...** **Lesson Absences...** on the Student Lesson Attendance Summary web part. This is achieved using **Site Actions | Edit Page** followed by expanding the **SIMS Learning Gateway Web Part Properties** section and deleting the text in the **Web part Links** text box. Click in the field to display a **small box with dots in it** – this is shown in the following graphic.



[More Lesson Attendance Details...|StudentLessonAttendanceDetail.aspx]

[Lesson Absences...|StudentLessonAttendanceDetail.aspx]

The Student Planner

There are two (slightly different) ways a student can see their own timetable:

- From the [Student Timetable](#) link at the bottom of their **Student Summary** page
- From the **Students** tab.

The first way shows a clean timetable surfacing only the student details as devised in normal timetabling techniques in SIMS.

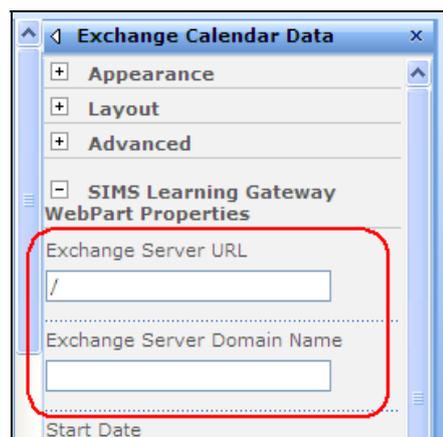
The second way includes this clean aspect but is also designed to surface a line of information from the SIMS Diary and to surface a line from the student exchange calendar (if an Exchange server exists).

The Exchange Calendar Data web part on this page (and also on the equivalent **Teacher** page from the **Teacher** tab) is likely to show this licence key error message:



Schools should use the Hide on Page technique to make it invisible.

If a self-hosting school has an Exchange server it needs its **SIMS Learning Gateway Web Part Properties** completed with Domain and Server Name information:



For set up details please see Resource Number 13851 on Support Net.

However, it needs a single AD to work. Hosted schools use Capita AD for SLG work. One solution might be the use of the Page Viewer web part to display your **Exchange log-in** page.

If a school is happy that students see the data in the school SIMS Diary, nothing extra need be done (except hiding the Exchange Calendar web part).

However, if a school uses the SIMS Diary extensively for teacher information and does not want this data surfaced to students, we can ensure that the student only ever sees the clean version of the timetable.

The **Students** tab is no more than a hyperlink – we can quite easily create another hyperlink to the clean version of the student timetable.

The clean version of the timetable has a URL similar to this – you will need to alter the bolded elements to match your own SLG2 installation:

<https://hslg10.capita-cso.co.uk/schools/grab/SLG/Students/SLGPages/>

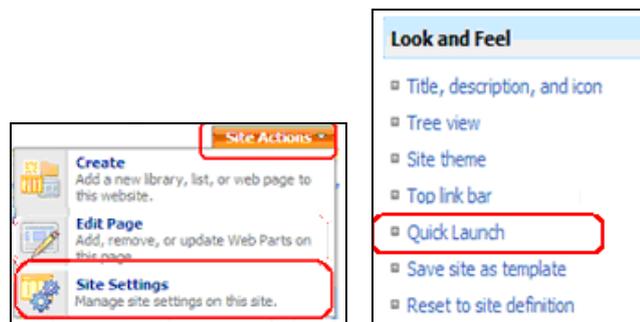
This is followed by one of these choices:

- [StudentTimetable.aspx?CalendarPeriod=day](#)
- [StudentTimetable.aspx?CalendarPeriod=week](#)
- [StudentTimetable.aspx?CalendarPeriod=month](#)

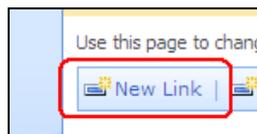
The **Week** view is used by most schools.

An administrator can do the following to create a new link to this URL (in the **Quick Launch** area of the **Student Index**):

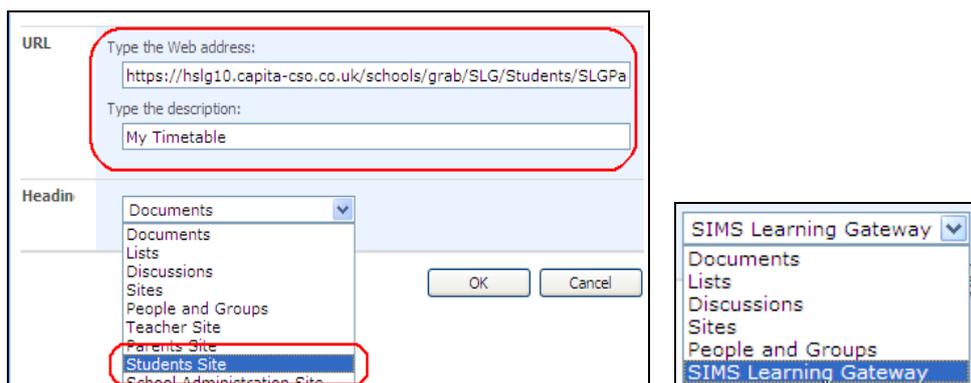
On the school **Home** tab, select **Site Actions | Site Settings** and then click **Quick Launch** in the **Look and Feel** column:



1. On the next screen click the **New Link** icon:



2. Then complete the details on the next page with the clean timetable URL and description (probably **My Timetable**). Make certain that the **Heading** drop-down shows **Students Site** (or perhaps SIMS Learning Gateway) before clicking the **OK** button.

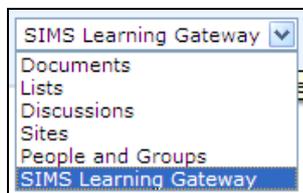


This puts a new link onto the student **Quick Launch Area** list:



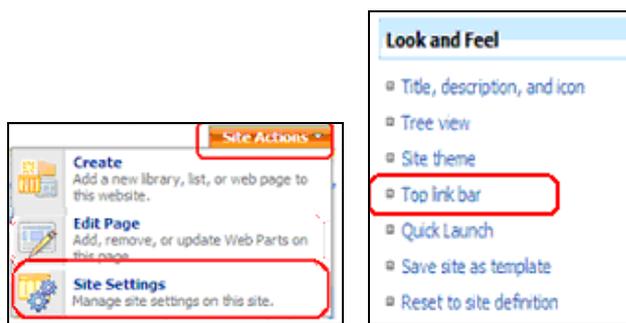
However, there is a second instance if the **Student Index** inside any of the student pages – if you click, say, **My Summary** from the student index, then on the next page you will notice that the [My Timetable extra](#) link does not immediately show.

Stay on that **Student** page and follow the routine described above to add a [My Timetable extra](#) link to the **Student Site** section again. Note that this time around, the heading offered is labelled SIMS Learning Gateway:

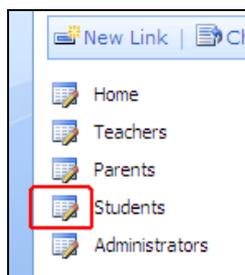


This Index will follow you around anywhere in the student pages. Finally, although you have now created new QLA hyperlinks to a clean timetable, you can still see the top tab link to the one including SIMS data. So a last job is to delete this tab link – this does not and must not delete the **Student** site – it only removes a link to that site.

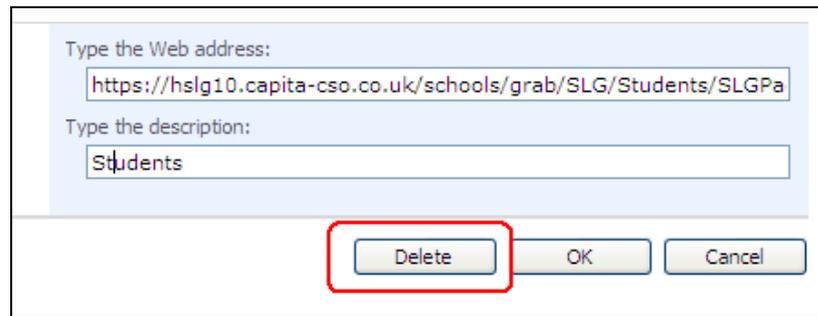
1. To achieve this, click the **Home** tab and select **Site Actions | Site Settings | Top Link Bar**:



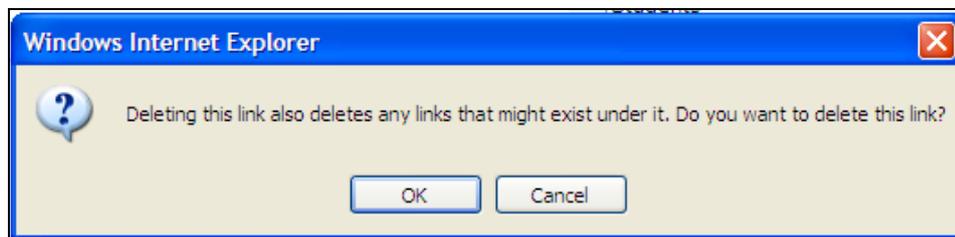
2. Click the **Edit** icon for **Students**:



3. Click the **Delete** button:



4. Click the **OK** button at the next prompt:



The **Student** tab disappears.

For an up to date and full list of all the Capita web parts and their properties you may wish to adjust, see the document entitled *SIMS Learning Gateway Web Parts Handbook*, available on SupportNet. At the time of writing, the latest version for *SIMS 7.132* is resource number *13851*, but this will of course be updated for later releases.

Nevertheless, for all of the web parts, the technique is the same: after a discussion among colleagues at the school, a decision needs to be made as to whether the school is happy to show the web part to the end users or not. If not then the school either needs to change the processes in school so that they are happy to show the data, or to remove the web part, or parts of it. Having made the decision to remove the web part, either then hide or close the whole web part, or use the more granular tools within the **SIMS Learning Gateway Web Part Properties** to hide or reveal the data contained therein.

03

Teachers and SLG2



This section contains:

- The Teacher View
- Attendance Register Page
- Marksheet Page
- Profiles Page
- Student Search Page
- Staff Search Page

The Teacher View

The main areas of the default teacher are as shown:

This **My Planner** screen combines elements from three different areas:

1. It shows the teacher’s own timetable as it is in SIMS. If the option in the web part has been enabled, it also shows if the teacher is on cover, and also if there are other lessons which are being covered and by whom, therefore:

The screenshot shows a timetable for two days, 3 and 4. The lessons are as follows:

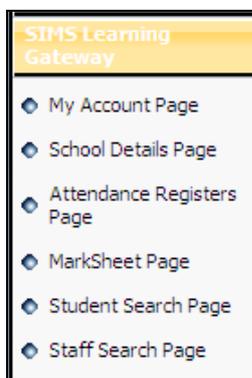
Day 3	Day 4
8:45 AM Mon:Reg - 11D - (S1)	8:45 AM Tue:Reg (Covered) - 11D - (B1)
9:15 AM Mon:1 - Science - (S1)	9:15 AM Tue:1(Covered) - Science - (E4/H6)
10:15 AM Mon:2 - PPA	10:15 AM Tue:2(Covered) - Science - (S1)
11:35 AM Mon:3(Cover) - Religious Ed - (H1)	11:35 AM Tue:3(Covered) - Science - (S1)
12:35 PM Mon:4 (Additional) - French - (L2)	12:35 PM Tue:4(Covered) - Science - (S1)
2:30 PM Mon:5 - Biology - (S1)	

Annotations in the image:

- Box 1: Points to 'Mon:1 - Science - (S1)' with text: "This teacher is providing cover for a Religious Education class to be held in room H1. Clicking the link provides details about the class and cover."
- Box 2: Points to 'Mon:4 (Additional) - French - (L2)' with text: "This teacher is an additional resource for this class. Clicking the link provides details about the class."
- Box 3: Points to 'Tue:1(Covered) - Science - (E4/H6)' with text: "This class is scheduled to take place in two rooms, E4 and HG. Clicking the link provides details about room location and who is providing cover."
- Box 4: Points to 'Tue:2(Covered) - Science - (S1)' with text: "This teacher is absent, but all their classes are covered. Clicking the link provides details about who is providing cover."

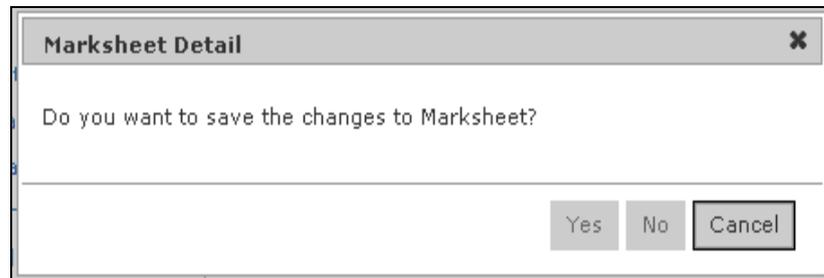
2. It also has items directly linked from the SIMS school diary (note these items are also displayed by default to the students’ equivalent screen so it depends to what use you put the SIMS diary as to whether that is appropriate. It can of course be removed from the **Students’** screen)
3. It can also show items from an Outlook calendar if the school has Exchange. This is not possible on a hosted school and the web part to do this will need to be hidden.

Links on the **Quick Launch** menu on the left connect dynamically to SIMS functions:



The **My Account** and **School Details** pages are the same as those for students and parents and have been described earlier – see *Unit 1*.

Teachers can enter data and save to SIMS from three areas of SLG2 – **Registers**, **Marksheets** and **Profiles**. In each case you are reminded if you try to move from the page without saving. The following graphic shows the marksheet warning:



Attendance Register Page

The [Attendance Registers Page](#) link lets the teacher mark the registers through whatever means are available in school, e.g. Lesson Monitor. On the first page the teacher can change the date and also over-write their own name with that of a colleague to cover a class - choosing one class gives access to the name list for editing. Note it is the **Search** button you need to click to find the lessons for another teacher, not the **Refresh** button:

Teacher	Class	Room	Period
Ms Anne Little	10A		Tuesday AM
Ms Anne Little	13A/Pe1	Business Studies 2	Tue:1
Ms Anne Little	13A/Pe1	Business Studies 2	Tue:2
Ms Anne Little	10A		Tuesday PM
Ms Anne Little	7C/Gg		Tue:5

Name	Reg AM	Tue:1	Tue:2	Tue:3	Tue:4 PM	Tue:5
Abbot, James	7C	-	-	-	-	-
Adey, Marc	7C	-	-	-	-	-
Bateman, David	7C	-	-	-	-	-
Bennet, Michael	7C	-	-	-	-	-
Blackmore, Tyson	7C	-	-	-	-	-
Goncalves, Joe	7C	-	-	-	-	-
Healey, Karen	7C	-	-	-	-	-
Jenkins, Ruth	7C	-	-	-	-	-

As with Attendance 7 and Lesson Monitor 7, the teacher can flood fill a column before making fine adjustment (marks pre-entered by the office are skipped over and not altered at this point). Also, hovering in a cell shows the lesson details for a student for that period in the day.

There is also the ability to record minutes late and comments about each student by clicking the **Green Pencil** icon.



Click to record minutes late and comments

Attendance Register - 10A - Ms Anne Little - 11/27/2007

Comments

Minutes Late

Those students who have had minutes late entered about them will then show as blue cells, while those with a comment will have a red pencil. Hovering over the cell will display what has been entered.

AKRAM, Amina	8A		-	-	-	-	-	-	-
AL AMIN, Ranjit	8A		-	-	-	-	-	-	-

Hover tooltip: Mrs A Little
8A
12 mins late
bus late

The information entered is immediately available to all staff in SIMS (and to parents and student if you wish).

Once marks have been saved, the teacher must deselect the **Preserve** check box before changing and re-saving – like the **Preserve/Overwrite** padlock in SIMS. As in SIMS, office pre-entered marks can be overwritten during a second save routine.

Marksheet Page

The [Marksheet Page](#) link gives access to those assigned to that teacher in SIMS Assessment module:



Marksheet page link

Marksheet Browse

Template Name Owners

Page Items per page Displaying 1-10 of 17 items

Marksheets

- **Progress Tracking Sheet Core Review : Year 7
- *5 A*- C Including English and Maths : 10A
- Effort Grades : 10A
- Geog Test : 8B/Gg 07/08
- Geography Progress : 9X1/Gg 07/08
- Jan 2008 Entry 11/8536 : Physical Education (GCEAS)
- Jan 2008 Forecast 11/8536 : Physical Education (GCEAS)
- Jan 2008 Result 11/8536 : Physical Education (GCEAS)
- KS2 Age Standardised Scores 2006 : Year 7
- KS2 Average Point Score Calculator : Year 7

Clicking any marksheet label gives its details and allows much of the functionality available in SIMS:

Green Abbey School > Teacher > SLGPages > MarkSheet

Teacher

► Marksheet Browse

▼ Marksheet

***Progress Tracking Sheet Core Review : 9D

► Details

▼ Marksheet Filter

Result Date: 05/08/2010 Group Membership Date: 05/08/2010

Apply

Save

Page 1 of 1 | Items per page: 40 | Displaying 1-29 of 29 items

Student Name	KS2 Average Point Score Key Stage 2 Validated Result	English Test Level KS2 Key Stage 2 Validated Result	Eng KS2 Sub Levels Year 7	2 Levels Progress English	KS3 English Target Level	English Attainment Lev 1 Year 7 Autumn Term	English Attainment Lev 2 Year 7 Spring Term	English Attainment Lev 3 Year 7 Summer Term	QCA Y7 English Level	English Attainment Lev 4 Year 8 Autumn Term	English Attainment Lev 5 Year 8 Spring Term
ADDISON, Millie	27	4	4A	6	5	4A	5C	5C	5c	5B	5E
BIBBY, James	25	3	3C	5	5	3C	3B	3B	N	3A	3A
BLAKEMAN, Joanne	27	3	3C	5	5	3C	3B	3B	N	3A	3A
BROWN, Jenny	21	3	3A	5	4	3A	4C	4C	4c	4B	4E
BROWN, Matthew	29	4	4C	6	6	4C	4B	4B	4b	4A	4A
ELSTON, Mrs Olivia	27	4	4A	6	5	4A	5C	5C	5c	5B	5E
FALOON, Aaron	27	4	4A	6	5	4A	5C	5C	5c	5B	5E
FERN, Joshua	17	B	B	4	3	1A	2C	2C	N	2B	2C
FLETCHER, Tristan	30	4	4B	6	6	4B	4A	4A	4a	5C	5C
HONEYWELL, Fred	27	5	5C	7	5	5C	5B	5B	5b	5A	5A
HUGHES, Lee-Paul	29	4	4A	6	6	4A	5C	5C	5c	5B	5E
HUTCHINSON, Roger	27	A		1	5						
JONES, Charlotte	25	3	3A	5	5	3A	4C	4C	4c	4B	4E
KAUR, Samreen	23	4	4A	6	5	4A	5C	5C	5c	5B	5E
LEWIS, Richard	27	5	5C	7	5	5C	5B	5B	5b	5A	5A

Marks can be entered in the usual way...

Marksheet - ***English Progress Traffic Lights : Year 9

▼ Details

Notes

Last Edited: 17/09/2008

Marksheet Complete:

▼ Marksheet Filter

Result Date: 20/05/2009 Group Membership Date: 20/05/2009

Apply

Save

Page 1 of 17 | Items per page: 10 | Displaying 1-10 of 169 items

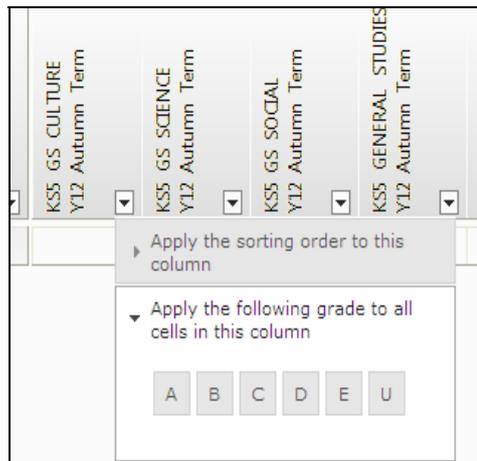
Student Name	English Termly Target Year 9 Autumn Term	English Attainment Level Year 9 Autumn Term	English Target Comment Year 9 Autumn Term
ABBOT, Clarissa		8C	
ABLE, Benjamin		8C	
ABU-KOASH, Frederik		8C	
ADAIR, Geoffrey		8C	
ADAMS, Louise		8C	
ADDISON, Avie		8C	

...and calculations, e.g. for traffic light colour coding can be carried out by clicking the **Calculate** button.

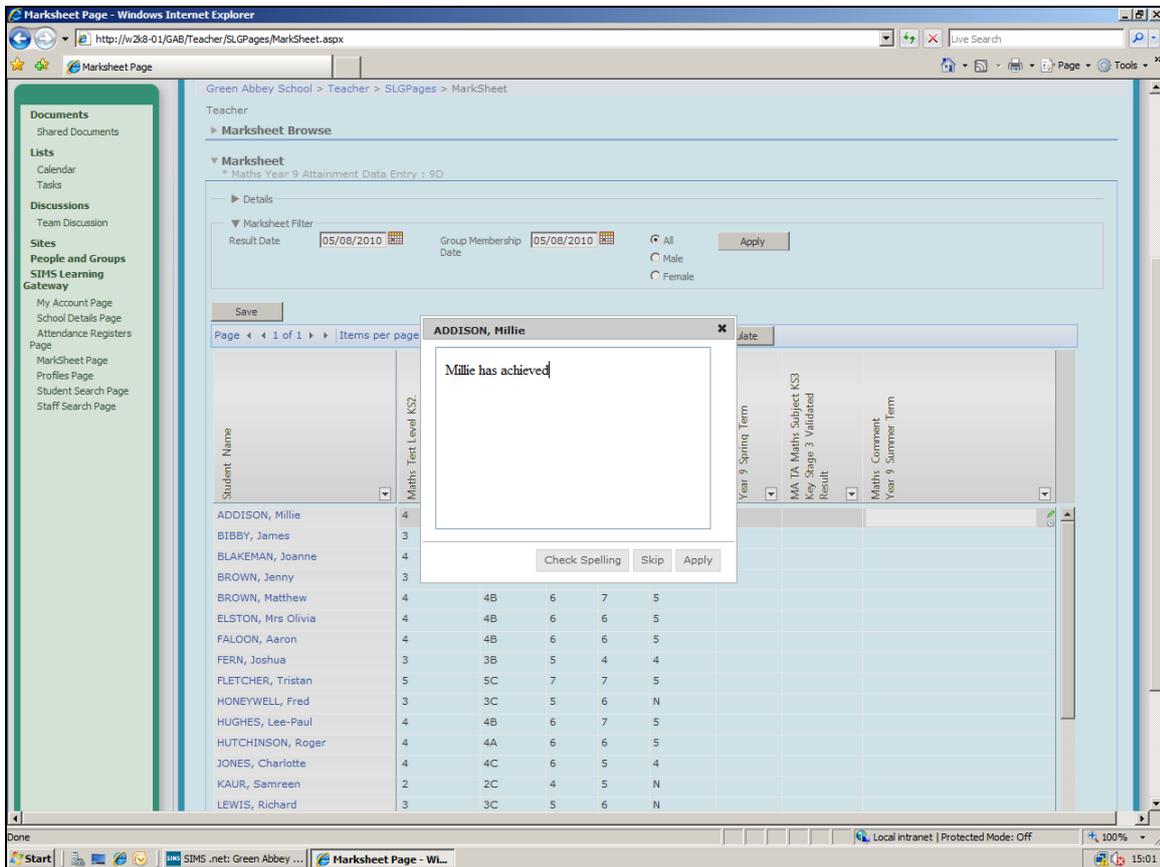


NOTE: You must save before the **Calculate** button will be effective.

Marks can be flood filled from a list of eligible codes:



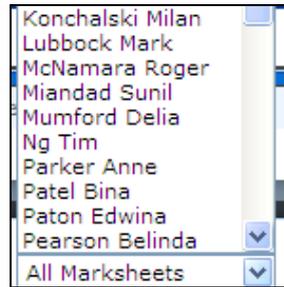
Comments can be entered in appropriate cells by clicking the **Green pencil** icon.



These comments can also be spell checked by using the **Check Spelling** button.



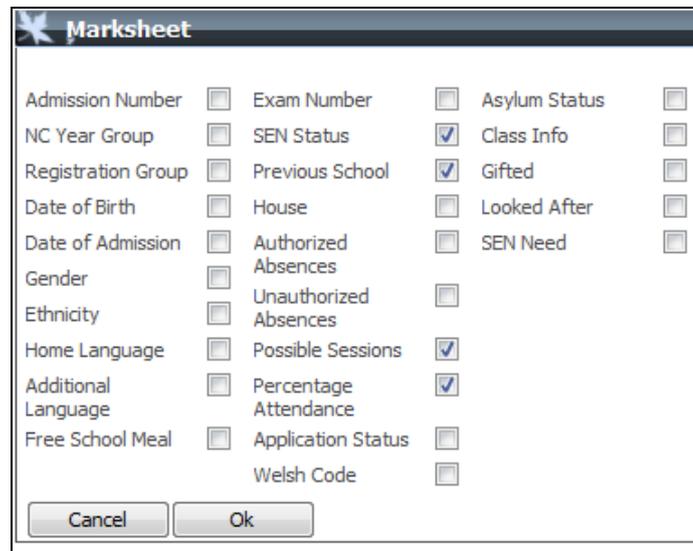
You can also search for marksheets for other teachers using the **All Marksheets** filter, if you have the SIMS rights to do so:



The same useful extra columns available on the rich client version of SIMS marksheets are available by clicking the **Columns** button, and then choosing those which you require to be displayed.



Columns button



The general point here is that as long as the Assessment system has been set up correctly in SIMS Assessment, i.e. templates have been set up and marksheets have been allocated correctly to teachers and their classes, with the exception of teachers needing to click the **Calculate** button on the Learning Gateway version of the marksheet, there is very little difference in using Learning Gateway as opposed to SIMS. and there literally nothing else the assessment coordinator needs to do in SIMS for the system to work correctly in Learning Gateway, apart from give staff a small amount of training. In particular, as with any software, but especially that which is reliant on an internet connection, it is advised that data on marksheets is saved very regularly.

Within SIMS, on the **Template Design** screen, there is an additional **Display results in Learning Gateway** check box. This has nothing to do with the teachers' ability to see marksheets, but is to allow users to see a list of results from aspects within that template to be visible on the **Student Summary** page. Only aspects allocated to templates with the **Display Results in Learning Gateway** check box selected will be visible to parents and students. Teachers see all of the marksheets allocated to them whether that check box is selected or not.

Marksheets have always been designed for teacher use and the labels/codes used and the wide range of data displayed may not be appropriate for publication to parents. Many schools will want to devise new templates with fewer, more user-friendly labels for parental use.



NOTE: The ability to publish students' reports to parents, generated as a PDF stored as a Linked Document in SIMS, including data entered via SIMS Assessment is scheduled for release in the SLG2 2010 Autumn Main Release, but will be discussed further in Chapter 4.

Further to this list displayed on the **Student Summary** page, as part of the tidying up process described in the previous chapter, SLG administrators can alter the text displayed for column headings in that web part, for example you may wish to alter the column heading which by default says Description, to Period of Assessment, since in fact what goes in that column is the name of the result set.

SIMS Learning Gateway Column Headings	
Assessment Text	<input type="text" value="Assessment"/>
Description Text	<input type="text" value="Description"/>
Result Text	<input type="text" value="Result"/>
Notes Text	<input type="text" value="Notes"/>
Date Achieved Text	<input type="text" value="Date Achieved"/>

Profiles Page

The [Profiles Page](#) link gives access to the Profiles module of SIMS for report writing.

As with the Assessment Marksheetworks, as long as the Profiles session, comment banks and classes have been set up correctly in SIMS, again there is nothing else which needs to be done in Learning Gateway to make those Profiles data entry screen available to the teachers of those classes.

However, it should be noted that the screens within Learning Gateway are only for data entry of the classes that the user him or herself teaches. There is no way to allow a head of department for example, to see the other classes in his department, nor at present is there the equivalent of the **Profiles Review** screen which is available in SIMS.

[Profiles Page](#)

Profiles Page link

In the **Profiles Browser** section, teachers will see an **Index** list of their reports. Clicking one of them produces a list of students in the group:

Profiles Browser

Membership Period From 05/09/2007 To 21/07/2008 Refresh

Year 9 Full Report 2007/08

Name	Year Group	Reg. Group	House	Gender
Afzal, Kashif	9	9F	Hooke	M
Basan, Selima	9	9F	Hooke	F
Bennett, Jill	9	9F	Hooke	F
Borel, Kayleigh	9	9F	Newton	F
Bunyan, Minna	9	9F	Boyle	F
Burbank, Amber	9	9F	Flemming	F
Dickinson, Mila	9	9F	Newton	F
Diddams, Zoe	9	9F	Flemming	F
Diganerio, Raphael	9	9F	Hooke	F
Dillon, Suzanne	9	9F	Curie	F

Clicking a student name generates an editable report in the **Profiles Detail** section of the screen, including a photograph of the student if one has been attached to the student. Exactly as in SIMS, the teacher can choose from comment back and add free text.

Profiles Page - Windows Internet Explorer

Membership Period From 05/09/2006 To 21/07/2007 Refresh

Year 9 Report 2006/07

Name	Year Group	Reg. Group	House	Gender
Adam, Briony	12	J	Hooke	F
Aleen, Mina	12	J	Curie	F
Arnold, Matthew	(11)	(11C)		M
Ashbury, Jon	(11)	(11B)		M
Chinnieh, Charmaine	(11)	(11B)		F
Craddock, Penelope	12	J	Newton	F
Currie, Edie	(11)	(11B)		F
Dali, Sally	(11)	(11C)		F
Dickinson, Emily	12	J	Curie	F
Dixon, Shelley	(11)	(11C)		F

Profiles

List Entry Details: 9x/Ma3 : Adam, Briony : J Mrs D Mumford

Save Next Student / Previous Student

Section Selector

- Mathematics
 - Introduction
 - Using and applying Maths
 - Number and Algebra
 - Shape, Space and Measures
 - Handling Data

Comment Selector for Using and applying Maths

Select	No.	Type	Comment Text
<input checked="" type="checkbox"/>	1	J	When solving problems <forename> tries different approaches and is able to find ways of overcoming difficulties that arise.
<input type="checkbox"/>	2	J	<He> is beginning to put some organisation into <his> work and check the results <he> obtains.
<input type="checkbox"/>	3	J	<forename> is able to discuss <his> mathematical work and has started to explain <his> reasoning.
<input checked="" type="checkbox"/>	4	J	<forename> is able to explain <his> use of diagrams and <he> is beginning to give a mathematical justification for <his> generalisations.
<input type="checkbox"/>	5	J	<forename> justifies <his> generalisations or solutions, showing some insight into the mathematical structure of the situation being investigated.
<input type="checkbox"/>	6	J	<he> applies the mathematics <he> knows in familiar contexts and uses mathematical language and symbols effectively in presenting a convincing reasoned argument.
<input type="checkbox"/>	7	J	<His> reports include mathematical justifications and explain <his> solutions to problems involving a number of features or variables.

Comment Editor for Using and applying Maths

MS Sans Serif 10 Refresh Check Spelling Word Count: 40

When solving problems Briony tries different approaches and is able to find ways of overcoming difficulties that arise. Briony is able to explain her use of diagrams and she is beginning to give a mathematical justification for her generalisations.



NOTE: The ability to publish students' reports to parents, generated as a PDF stored as a Linked Document in SIMS, including data entered via Profiles is scheduled for release in the SLG2 2010 Autumn release.

Student Search Page

The [Student Search Page](#) link gives access to SIMS student records which can be searched for a selected student using techniques familiar to any SIMS user:

[Student Search Page](#) *Student Search Page link*

Student Browse

Surname: Year Group: House:
 Forename: Reg Group: Tier:
 Status:

Page: Items per page: Displaying 1-10 of 10 items

Name	Year Group	Reg. Group	House
Abbot, Ben	10	10A	Hooke
Abdelkoder, Mohamed	9	9C	Flemming
ABLE, Benjamin	8	8A	
Able, Matthew	13	M	Flemming
Ablett, Michael	11	11E	Curie

From the **Student Summary** page further links from each panel are shown if more details are required.

GreenAbbey Teachers Site

Student Basic Information - Benjamin Abbot

Legal Forename: Benjamin
 Middle Name(s): Michael
 Legal Surname: Abbot
 Preferred Surname: Abbot
 Preferred Forename: Ben
 Date of Birth: 12/07/1993
 Age: 14 years, 3 months
 Gender: Male
 Birth Certificate Seen:

[More Student Details...](#)

Student Conduct Summary - Ben Abbot

Academic Year 2007/2008

Achievements - Total Points 0
 Page: Items per page: Displaying 0-0 of 0 items

Date	Type	Points	Comments	Award	Award Date

Behaviour - Total Points 0
 Page: Items per page: Displaying 0-0 of 0 items

Date	Type	Points	Comments	Action	Action Date

Student Session Attendance Summary - Benjamin Abbot

Description	Lessons	%
Present	0	0
Authorised Absence	0	0

Staff Search Page

The [Staff Search Page](#) link gives a similar view of staff information for a selected person:

[Staff Search Page](#) *Staff Search Page link*

The screenshot shows the 'Staff Browse' search interface. It includes several search criteria: Surname (with 'A' entered), Forename, Staff Code, Previous Name, Gender (set to '<Any>'), Title (set to '<Any>'), and Status (set to 'Staff, all Current'). A 'Search' button is located below the criteria. Below the search area, there is a pagination bar showing 'Page 1 of 1', 'Items per page 10', and 'Displaying 1-4 of 4 items'. A table lists the search results with columns for 'Name' and 'Previous Name'. The results shown are: Abell, Anita; Andrews, Selina; Asher, Dawn; and Atkinson, John Henry.

The screenshot shows the 'Staff Basic Details - Mrs Anita Abell' page. It displays personal information in a form: Title (Mrs), Legal Forename (Anita), Middle Name(s) (empty), Legal Surname (Abell), Preferred Surname (Anita), Preferred Forename (Abell), Gender (Female), and Elige for SWR (checked). A photograph of Mrs Anita Abell is shown to the right of the form. Below the form, there is a section for 'Previous Names' with columns for 'Preferred Surname' and 'Preferred Forename'. A link for 'More Staff Details...' is at the bottom.

From the Staff Browser web part, you can access a member of staff's timetable. For example, you can search for Mrs Abell and click her name to access her information. From Mrs Abell's Staff Basic Details web part you can access her Teachers Timetable or other basic information. Your SIMS systems manager controls the range of staff data visible to colleagues (see *Unit 5*). Controls set up in SIMS are also updated in SLG2, for example, the default Class Teacher group in SIMS cannot see colleague address information and will see this in SLG:

The screenshot shows the 'Staff Address Information' section. It contains a label 'Current Home Address Details (Validation Status Unknown)' and a text box that says 'Address not available'. The text box has a vertical scrollbar on the right side.

04

SIMS Preparation for SLG



This section contains:

- Introduction
- Duplicate Contacts
- Parental Responsibility
- Distributing Account Credentials
- Other Items to Address Within SIMS

Introduction

User IDs and passwords for SLG2 are created through a SIMS routine called Provisioning. The actual process is quite simple and will be described in *Chapter 5*, but before you get to that screen it is vital that both the data in SIMS and the processes by which that data gets there are checked and agreed.

Your consultant will have given you a more succinct version of this chapter in a single document and will have discussed the issues with you, but this chapter will discuss in detail the items you will need to address.

The provisioning process creates an ID and password for each user and also creates and populates extra AD groups for **All Teachers**, **All Students** and **All Parents**. This information is used after logging on to filter appropriate content to the user depending upon their group membership.

Each contact with parental responsibility gets a separate IDs and password. The decision as to whether the contact can have an id and password created for him or her and therefore, gain access to a child's personal record is only by whether or not he or she has the **Parental Responsibility** check box selected for that child and does not have the **Court Order** check box selected.

2 Relationship Details			
Student	<input type="text" value="Ben Abbot"/>	Contact Type	<input type="text" value="Mother"/>
Correspondence	<input type="checkbox"/> Parental Responsibility	Priority	<input type="text" value="1"/>
Pupil Report	<input type="checkbox"/> Court Order	Contact Priority Source	<input type="text"/>

3 Telephones and Email Addresses

In other words it has nothing to do with the fact that he or she is a natural mother or father, or the contact priority. It is therefore vital that the details about the contacts and their responsibilities for children at the school are correct before an id and password is given out.

We recommend the school follows the processes outlined below.

We also recommend that the school makes the best effort it can to collect email information for each SLG2 user and adds this to the correct fields in SIMS. This is relatively easy for teachers who will have a school based email address available; students may also have such an address. Schools can make it an important or essential part of their roll-out publicity that parents provide an up-to-date email address, possibly before names are Provisioned and ID and password information is issued, and sign a suitable responsible use policy (an example of which you will have been given), before they receive their credentials.

Having corrected the existing contact information in SIMS, there are also other key processes within the database which will need to be discussed in this chapter.

Duplicate Contacts

1. Best practice in SIMS recommends that each user is in the SIMS database only once. When new siblings join school the single existing adult record should be reused for the new children. If a member of staff has a child at school, best practice is that their **Staff Details** are also used as Contact information for the child.

However, it is not unusual for a school to have entered details for a contact twice, due to data coming in via Common Transfer File (CTF) or just perfectly understandable minor oversights in the office. For SIMS general use this has not previously been a big problem, however it creates issues for SLG2 because each contact would receive multiple IDs and passwords, ID1 would only see the details for Child1; while ID2 would see only Child2.

If an adult contact is in SIMS once and linked to several children, then their single SLG2 ID will give them access to all relevant children from their **My Children Dashboard** page.

If a teacher has children at the school, then using their staff details as contact details will ensure that they see all Teacher functionality and all Parent functionality after their single log-in, once provisioned for both roles.

2. Select **Tools | Housekeeping | Delete Unlinked Contacts** routine in SIMS to clean out the list there.

- Run one of the **Duplicate Contacts Check** Reports and use it to help identify where such contacts exist. As part of your training resources your consultant may have provided you with a better version of this report than the standard one available within SIMS and may have even run the report for you. This better report will not only identify in blue where it suspects there might be a duplicate contact, but also where there are missing forenames for the contact (which will stop the user being provisioned) and where there is apparently a missing post code. This latter apparent omission could also be caused by the **Home address can be disclosed** check box being deselected in the contacts **Address Details**. Unless this has been done deliberately, it will of course cause a problem with any letter with an address on it to send the contact his or her password.

- If such duplicate contacts are found, rename one to identify it as being the one you wish to delete (e.g. Smith becomes xxxSmith).
- Attach a misplaced student to the correct version of the contact; remove the link to the incorrect duplicate contact.
- Select **Tools | Housekeeping | Delete Unlinked Contacts routine**.



NOTE: This process does not have to have been completed for all duplicate contacts before provisioning any parents. However, the school should always check details of each parent before provisioning.

- A similar approach should also be taken to remove duplicate contacts who are staff members.

Parental Responsibility

1. Run a report to identify anomalies such as students with contacts that are not their mother or father being recorded as having parental responsibility or where the contact is shown as being a parent, but does not have parental responsibility. Such a report should have been given to you as part of your training materials. The report identifies in red contacts where they may be a problem.



NOTE: this is a very tricky and sensitive area. The report is not saying that the data is necessarily incorrect, just that it may be worth checking. The school must be clear on its position as regards who should have parental responsibility for a child on the database and it has to be said there is some conflicting advice on the subject. Capita has to delegate that decision to the school or Local Authority.

2. Check and correct such anomalies.
3. The school must also ensure that any parents with a court order against them have that flag selected in the database, so that they are immediately denied access to the child's data, even if they have been previously issued with a login.

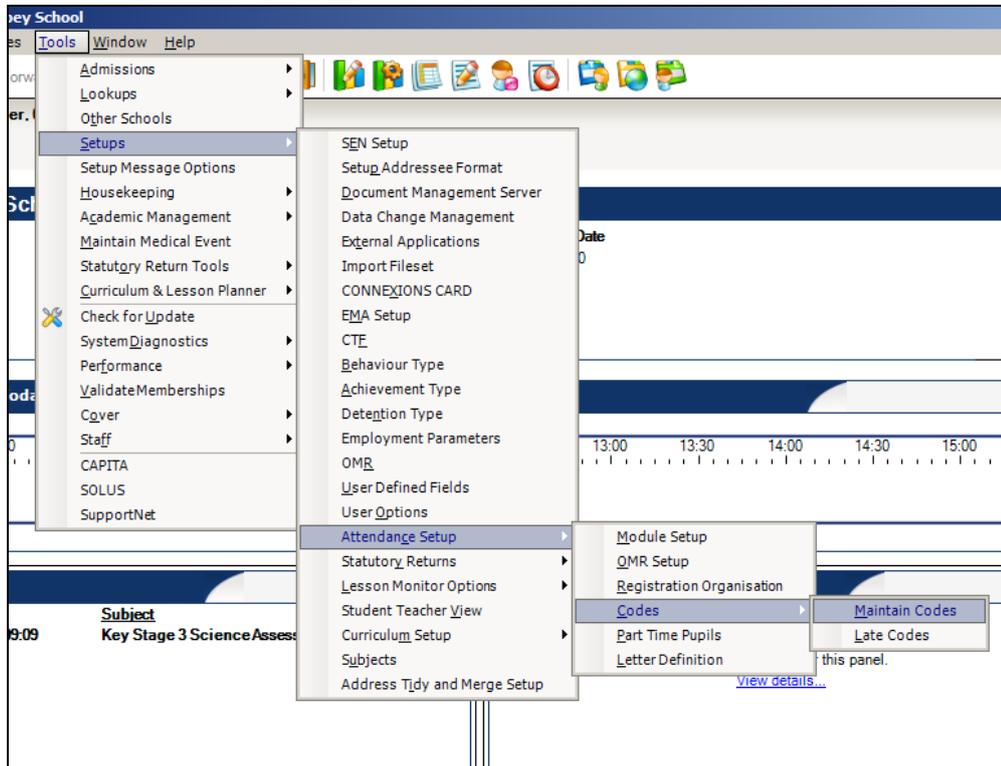


NOTE: as with the duplicate contacts issue, it is not necessary to have corrected all entries before provisioning anybody, but you must ensure that you check permissions before provisioning individual contacts.

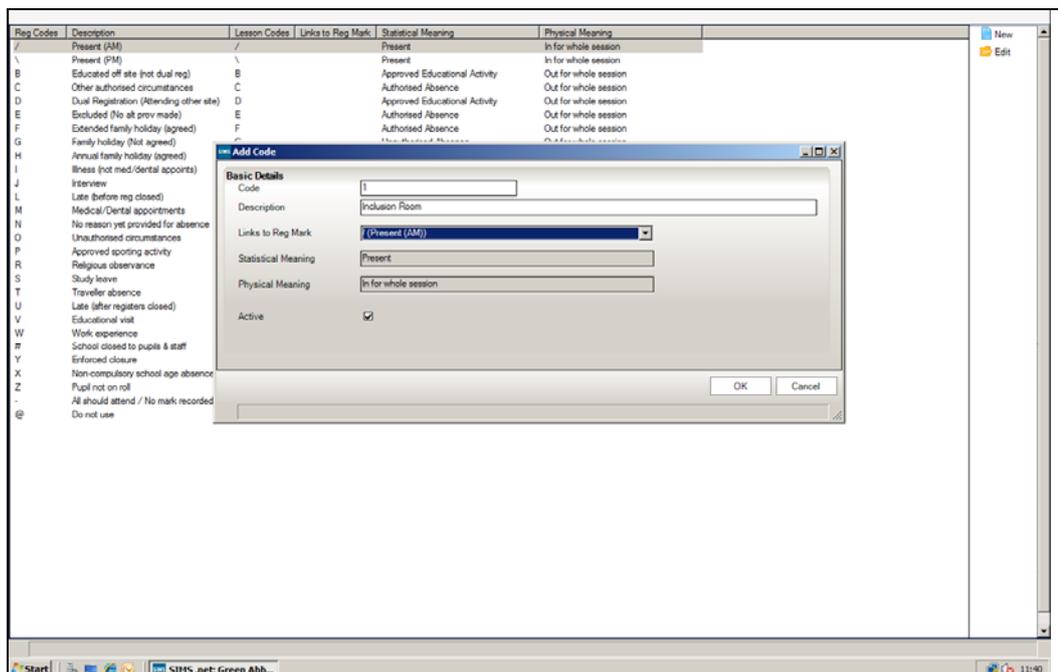
Other items to Address within SIMS

- Develop an internal administration policy that outlines key procedures and practices. This should include identifying what data to share and what to be kept private and school processes to ensure that information is kept up to date and accurate. This must ensure that your school implementation adheres to the Data Protection Act, protects young children and that it follows current guidelines and UK legislation. For example, ensure that you have acceptance or agreement with students, where necessary, to share data with their parents(s) or carer(s) in line with the Data Protection Act
- Ensure that the school staff involved are aware of their responsibilities as regards the data on the system and the fact that a parent does have the right to access any data should they request it, even if it is not displayed in Learning Gateway
- The main areas of concern and work are discussed below, but clearly there are issues to be considered as to which data to display in Learning Gateway and the implications of doing so, bearing in mind that previously it was unlikely that parents would see it. Apart from those below, areas to consider would include the **Notes** fields next to contact phone numbers, medical information, in particular medical events and **SEN** information. In each case, using the techniques described in *Chapter 2*, these web parts can be either completely or partially removed, if the school wishes, using the options given.

- Attendance data
 - It is good practice to pre-enter all known reasons for absence into the system. These include things like holidays, but also internal reasons why students may not be in their lessons but still be at school, such as inclusion rooms, lessons for special needs, music lessons etc. Internal codes for such reasons can be created, as follows.

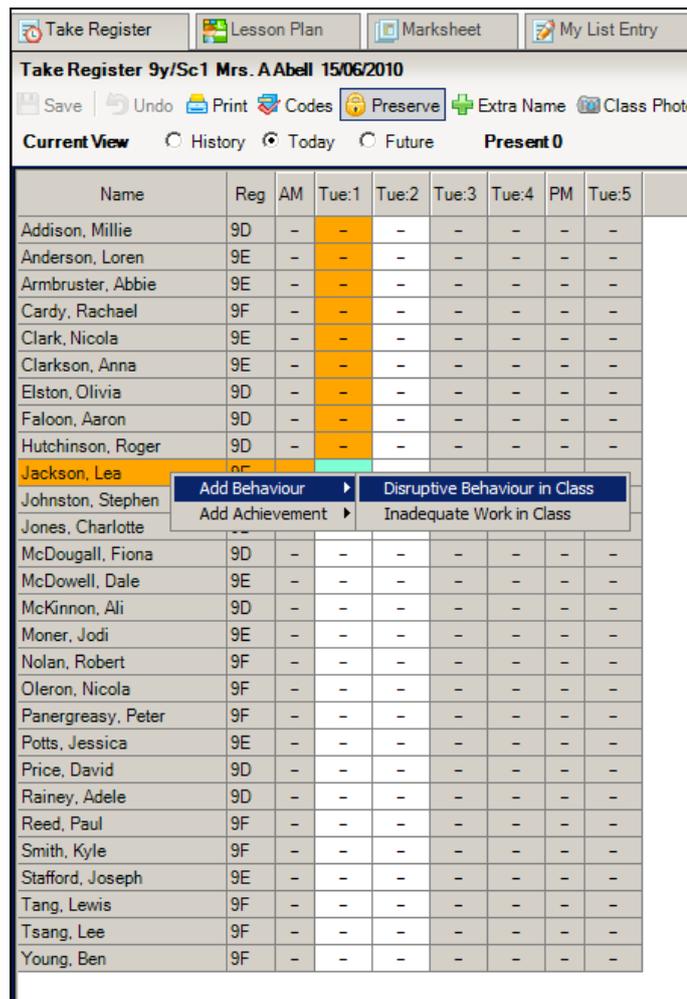
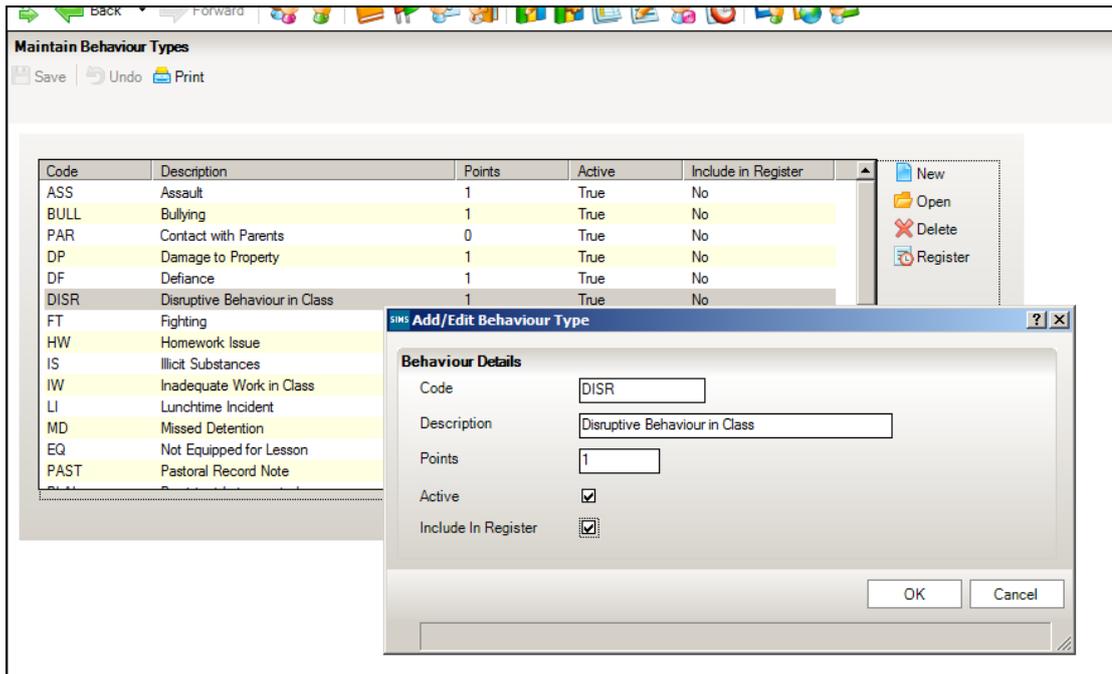


With the correct permissions, using the route shown in the preceding graphic, you will see the **Maintain Codes** screen:



By clicking the **New** button, you can create your own internal codes for whatever you wish. Note that for each one it must link to an existing statutory meaning and so has no implications for your Census Return data.

- School and parents should realise that Summary data in SLG2 (for Attendance and for Lesson Monitor) shows data up to the end of school yesterday. The details for each element shows today's data as well
 - The school needs to ensure that as near to 100% of registers are taken at all times and that students with unauthorised absences are picked up immediately. The reports, front screen **Missing Registers** panel and today's unauthorised absences can quickly identify such issues, but there must be systems in place to ensure that these reports are followed up immediately
 - If there are technical reasons why registers cannot be taken (such as in PE, where it may be more difficult to take a register), then these need to be addressed. There are various solutions for such issues, not least the use of a web enabled phone. Set parents' expectations that there may be some instances where Attendance data is not immediately published online. Ensure, for example, that no mark entered is not seen as an immediate cause for concern by parents
 - If staff suspect truancy from a lesson, systems must be in place to immediately address this internally, perhaps using the SIMS send message routine
 - Note that the ability to show register comments entered by staff is an item, which can be chosen to be displayed on the events part of the **My Children Dashboard**, so if you intend to allow this to be shown, be sure that staff are aware of the fact.
- Achievement and Behaviour
 - Decide whether to share Behaviour and Achievement information online with parents. You have various kinds of internal control over the range of data shown in the Conduct web part on the **Student Summary** page. You can change your mind at any time about this control and can phase it in or out at any time
 - Consider using the **Web Part Properties** to remove the ability for parents to see entries until staff have been trained to enter incidents
 - Consider using **Web Part Properties** to define what information columns are available to parents by showing or hiding **Behaviour** columns as required
 - Train staff on the appropriate way to enter incident details, particularly the use of comments, so as to avoid use of other students' names and personal opinion, and if staff are going to be the ones entering data into the system directly, use the ability of Include in Register in the Behaviour and Achievement Type set up screens shown in the following graphic, to allow the most common types of achievement and behaviour to be entered into the system with a simple right click from the register



- Use the ability to control whether an incident is published in Learning Gateway to staff only, or to all users, by adapting the **Behaviour Status** look up via **Tools | Lookups | Maintain**.

By changing the **Publish To SLG Roles** drop-down to **Staff only**, an event can be either delayed or permanently prevented from being displayed to parents. You may prefer to create a specific new Lookup Value such as Publish to SLG, so that even though resolved, a conscious decision to display an item to parents needs to have been made.

- Some schools set-up the Behaviour Management module in such a way as to minimise staff free text data entry, using the school's own systems in the lookup options
- In all cases, if the Behaviour Management module is to be used, it is vital that the school uses this opportunity to rethink its policies and procedures as regards how data is entered into the system.



NOTE: The ability to enter achievement and behaviour incidents plus fill in report card details directly via Learning Gateway is scheduled for the Spring 2011 release.

■ Assessment

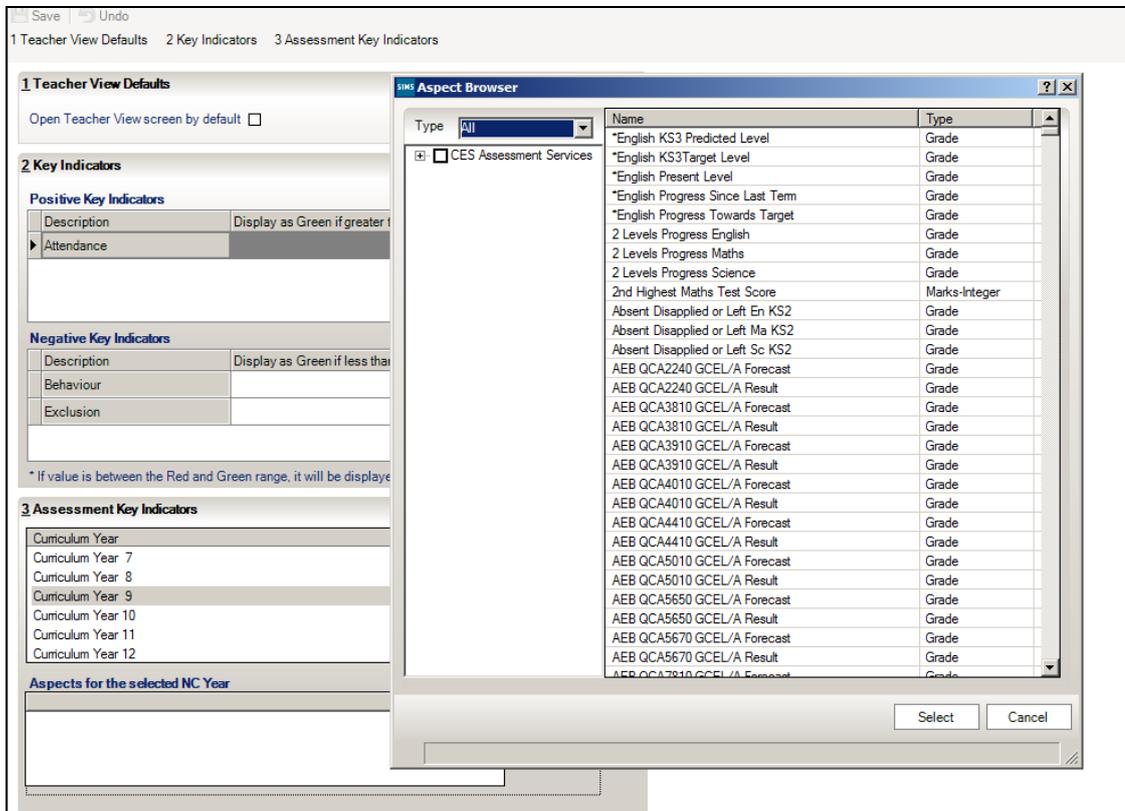
- As far as the teachers are concerned, the marksheets they have permission to view in SIMS via their SIMS and Group Supervisor permissions are the same marksheets they can view in SLG2 with no further action necessary



*NOTE: The **Display Results in Learning Gateway** check box in the **Template Design** screen refers to the parents' ability to view the aspects rather than that of the teacher.*

- Any template where the **Display Results in Learning Gateway** check box has been selected immediately displays any results that students have in the aspects on that template on the **Student Summary** screen. However, it is unlikely that the templates used by teachers to enter data are suitable to display to parents as there are usually too many aspects and it may be difficult for parents to understand them. The best advice is for the school to make one template per year group containing the 15-20 aspects that the school feels are most important for parents to view. In this scenario, the column headings can also be adjusted to make them easier to understand

- If you wish to use the **Key Performance Indicator (KPI)** option on the Headlines web part on the parents' **My Children Dashboard**, you must set those aspects you wish to use in the **Set up** screen of the **Student Teacher View**, via **Tools | Set ups | Student Teacher View**.



In panel **3** of this set up screen, you can choose up to three different aspects for each year group, which will then not only display on the **Student Teacher View** screen within SIMS for that student, but also, if you wish it, as **Headlines** on the parents' **My Children Dashboard**.

■ Profiles

- As with SIMS Assessment, there is no further action required within SIMS for the same Profiles reporting session to appear to the class teachers via SLG2. However, in order to make best use of the module, we advise that training is taken on how to set it up within SIMS.



NOTE: The ability to publish students' reports to parents, generated as a PDF stored as a Linked Document in SIMS, including data entered via SIMS Assessment and Profiles is scheduled for release in the SLG2 2010 Autumn Release.

When available, the process of uploading reports generated in either Profiles or SIMS Assessment will need to be managed carefully. The process is described below.

Essentially the process is in four parts:

1. Complete Reporting Session in Profiles or SIMS Assessment.

The reports are generated in the normal way within SIMS and then uploaded to the Document Management Server.

2. Publish Reports using SIMS.

The assessment coordinator then uses a new screen in SIMS:

With this screen you can decide to publish any historical reports by using the filters.

3. Pending reports are stored in SIMS.

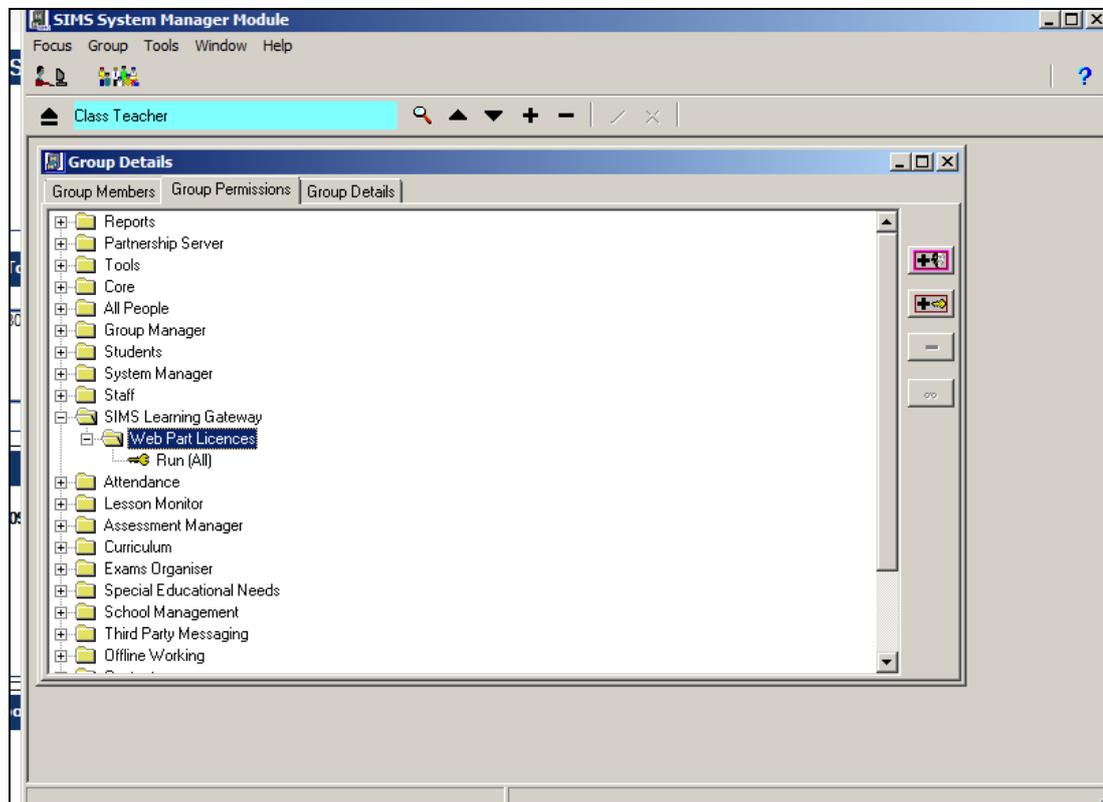
The above process initially takes the chosen reports from the Document Management Server and stores them with a status of pending within SIMS. Note that depending on how many reports you choose to publish this could take up a considerable space on the SIMS server.

The **Publish Reports** screen then allows you to choose when you want these reports to be uploaded to a document library on the live SharePoint site and therefore available for viewing. You can choose whether to display to each of the three roles and also put an expiry date at which point the report would be removed. Note that part of the publishing process can convert the Word document stored in the Document Management Server to a PDF format, but this can only do so if the machine being used to carry out the process has Word 2007 or later.

4. Reports removed from SIMS once published.

Even though the space taken up on the SIMS server will be released once the reports have been published on-line, nevertheless the school needs to take care as to how much space it is using from its on line allocation. This is clearly a major consideration for a hosted site, which by default initially has only 5Gb of disk space.

- Staff Personal Details
 - Only staff with Personnel permissions in SIMS can view more than staff timetables via SLG2. Ensure that these permissions are correctly set.
- SIMS System Manager Permission Groups
 - As part of the Provisioning process, those members of staff defined as teachers within the SIMS database are automatically put into the Class Teacher permission group. This is because in order to be able to view the Capita web parts they must have the particular permissions to run the web part licences given to them in that group by default, shown in the following graphic, and the above ensures that they do.



- There are two potential difficulties that arise from this:
 - If the school has previously created a bespoke Permission Group for its teachers then this group will not contain the above permission by default, but the process of provisioning has by default given the teachers the standard group permission anyway which the school does not want. If the school wishes to remove the teachers from the standard group, they must first add the SIMS Learning Gateway Licence permissions to their bespoke group
 - If a member of staff is not a teacher, the Provisioning process does not put them in a Permission Group automatically, so after provisioning those members of staff could find that they are not allowed to view some or all of the web parts. The other standard group which includes the relevant licence permissions is Administrative Assistant. So either they must be added to this group or the licence permissions added to whichever group they are members of before provisioning them. If the error is not noted beforehand, and the permission is added subsequently it may be necessary to wait till the next day before the effect is seen on a hosted site, or a self hosted school may need to do an iisreset on the web server.

Distributing Account Credentials

Even if the data has been checked as above, it is recommended that the following process (or similar) is followed:

- Choose one year group at a time
- Send a general letter asking if parents want online access to their children's data. Some schools first issue logins, then ask parents to apply for their password, thereby introducing an opportunity for further data checks and vetting that of applicants
- Send an Acceptable Use Policy to interested parents along with documents they must sign to confirm their acceptance, the accuracy of their details and details of the children for whom they have parental responsibility
- Request valid parental email addresses and enter this data into SIMS before provisioning
- Check and if necessary, amend all gathered Parental data
- Provision the parents and issue the logins and passwords, using adapted versions of the reports provided within SIMS
- Distribute usernames and passwords separately – there are separate reports in **SIMS | Reports | Run | Focus | Contacts**. In order for the **Addressee** and **Salutation** mail merge fields to populate, they must have been generated within SIMS. Unfortunately for the individual contacts there is no bulk process for doing this.



NOTE: Some schools have decided to send the logins and passwords separately by post, some have asked parents to collect them and some have given them out at parents' evening, where parents can immediately access the site and be given a demonstration.

- In all cases, given the potential for difficulty, especially with first-time logins, it is important to provide clear instructions and help to try to avoid problems
- If a parent loses or forgets their password, the school can reset it, but the school must have a clear procedure as to how this happens and how the new password is securely delivered to the parent.

05

SIMS Routines for SLG



This section contains:

- Introduction
- Adding and Deleting Users

Introduction

- Access to the SharePoint system is controlled by IDs and passwords set up and monitored through Active Directory (AD) routines
- Each school sends lists of potential users to the Hosted Service AD using a routine in SIMS. When a user logs in, the AD checks credentials and on approval, the user has access to the database information selected (by the original school) for their use
- Initially, schools will send users to the AD in one of three groups – teachers, parents or students. Each group will have different access permissions set by the school. Finer group detail is possible on request from Capita – see *Unit 10 – Capita Help Desk*
- This section explains the AD Maintenance routines and the permissions system controlled from within SIMS for the security groups according to information held within the SIMS database.

Adding and Deleting Users

1. From SIMS, select **Routines | Active Directory Provisioning | Provision Users | Students | Add Students**. The paths for other roles within the school are self evident.

Name	Year	Reg	House	Gender	Admission No

- Filter as needed, e.g. **Ben Abbot**; **Year 7**, then click the **Search** button. The individual or group is displayed.

Select Students to Add to Provisioning Service

Search Print Browse Select to Add

Provisioning Service: SIMS ADP Provision Surname: Forename: Status: Current

Tier: <Any> Year Group: Year 10 Reg Group: 10A House: <Any>

Name	Year	Reg	House	Gender	Admission No
Rochester, Earl	10	10A	Hooke	Male	002893
Smith, Patsy	10	10A	Curie	Female	002880
Taylor, Amelia	10	10A	Boyle	Female	002764
Thomas, Dillon	10	10A	Curie	Male	002898
Welsh, Karen	10	10A	Newton	Female	002864
Yates, William	10	10A	Flemming	Male	002896

- Select an individual or using the **CTRL** key, group of individuals, then click the **Select to Add** drop-down and select **Selected Items** from the drop-down list. To add all users on the list shown, select **All Items** from the drop-down list. The selected individuals are displayed.

Add Students to Provisioning Service

Save Print

1 Provisioning Service 2 Selected Students

1 Provisioning Service

Provisioning Service: SIMS ADP Provisioning Server

2 Selected Students

Name	Year	Reg	House	Gender	Admission No
Aleen, Mina	10	10A	Curie	Female	002821
Blundell, Justine	10	10A	Newton	Female	002867
Callar, Morwen	10	10A	Hooke	Female	002767
Corleone, Vito	10	10A	Hooke	Male	002805
Cruise, Penelope	10	10A	Newton	Female	002857
Davies, Olivia	10	10A	Flemming	Female	002774
Doone, Felicity	10	10A	Curie	Female	002860
Fauzi, Ahmad Farid	10	10A	Newton	Male	002807
Guthrie, Jessica	10	10A	Boyle	Female	002878
Harker, Mina	10	10A	Hooke	Female	002866
Heaney, Seamus	10	10A	Newton	Male	002895
Hutchence, Paulette	10	10A	Newton	Female	002834
Kamvar, Timota	10	10A	Flemming	Female	

Remove from list
Clear list

- Click the **Save** button and the individual or group is added to a queue which a **Scheduled Task** on the SIMS server will transfer at the allotted time. You can of course choose to run the Scheduled Task manually if you wish.

The paths for removing (or rather disabling) any user are self evident and the process is similar to that for adding them. Note that when a student is set as off roll in SIMS, by default both the student and parent lose access to his or her SIMS data, but can still log on to the site. Care needs to be taken when using the above routine to disable parent accounts that you do not also disable parental access to a younger sibling's data.

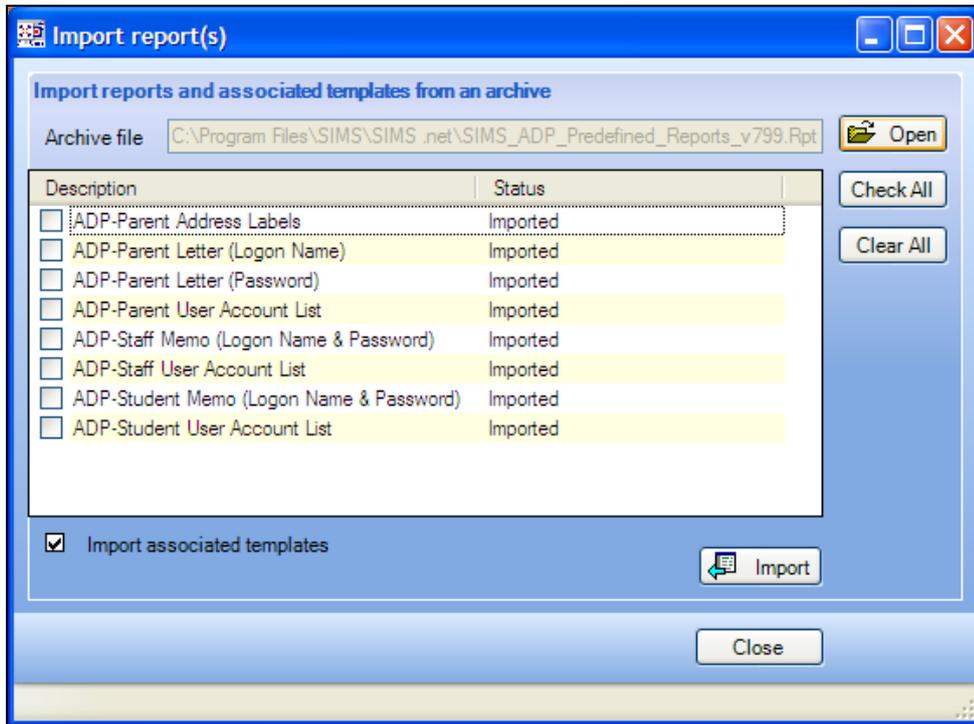
Any changes to memberships of groups in Active Directory, i.e. new users, deleted users and changes to group memberships in SIMS such as form and class changes, will be updated when the Scheduled Task linking the SIMS database with AD is run, usually overnight, but it can of course be run manually at any time.

The file to be run by the Scheduled Task is **ADPScheduledProcesses.exe**, which is to be found on the SIMS server and should have been set to run as a Scheduled Task. Usually a shortcut to the routine has been left on the desktop of the SIMS server.

After transfer you will see the new names in the **Administration** area of your **SLG2** site and in the **Passwords** lists in SIMS.

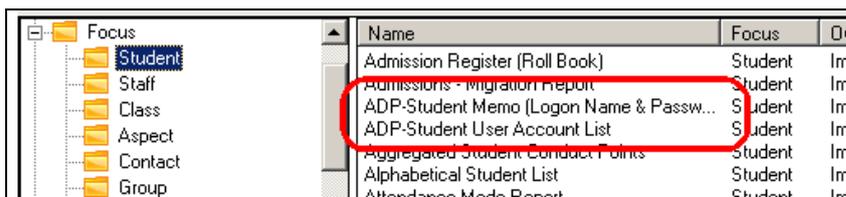
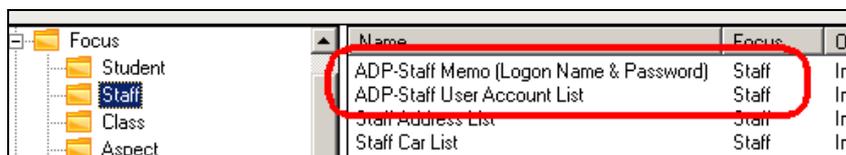
SLG2 Passwords Reports

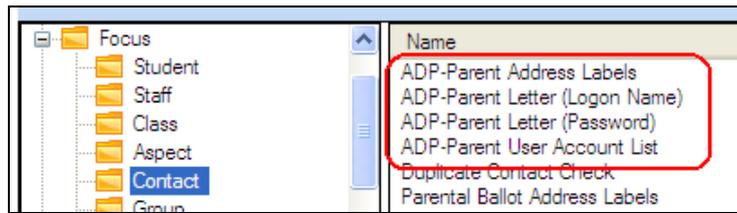
1. You can access the user information (IDs and passwords) through a new report. Import the latest **AD-PRptDef** files (after each update of SIMS):



2. After import, the reports are available by selecting **Reports | Run Report**. Click the **Focus** folder and then either the **Student**, **Staff** or **Contacts** folder. They all start with ADP.

Teacher and Student Reports offer only two kinds while Parents offer four.





To run these you need MS Office on your machine and you need to be in the School Administrator group of SIMS.

Staff and Student Memo Reports produce mail merged letters giving ID and initial password, schools can resave new versions of these reports in order to edit the rest of the text in this report to give any other information.

Staff and **Student User Accounts** lists produce summary Excel spreadsheets showing the user names and initial passwords for all users.

For parents there are two mail merged letters, one for IDs and one for Passwords, do not send both out in the same letter.

The **Parent User Accounts** list produces a summary Excel spreadsheet showing the user names and initial passwords for all users.



NOTE: There is no way to show a list of current passwords for users. The reports will only ever show the initial one, prior to its being changed. If a changed password is forgotten, it will have to be reset, either directly in AD for a self hosted school or by using the Administrator Site (see Chapter 6).

06

SLG2 Administrator Site



This section contains:

- Introduction
- Manage SLG2 User Detail Page
- Manage Registered School Page

Introduction

In this extra site the administrator can reset user passwords, can apply and revoke limited Admin permissions for a colleague and can register new school sites (mainly for LAs).

Entry to two different control areas is given in the **QLA**:



Clicking the links takes you to the relevant page.

Manage SLG2 User Detail Page

1. Type in a full or partial **First Name**, **Last Name**, **User Name** or **Security Group** label and click the **Search** button to produce a list of relevant names.
2. Click a name to see details.

For each user you can reset the password and assign SLG2 Site Administrator rights – you would only use the second option for a very few trusted staff members to allow them to reset passwords as by default this also gives site editing rights.

3. Click the [Reset Password](#) hyperlink to see the following screen:

4. The wording here explains the site password policy – this might need to be changed if it still has the default text: *Your new password must comply with the site password policy.*
5. Type the new password twice and click the **Reset** button.

SLG2 Site Administrator rights allow a selected user to reset passwords here; it also gives users the very powerful **Site Actions** button. It is probably a good idea that no more than two or three staff members have this right.

6. Click the [Assign SLG2 Site Administrator rights](#) hyperlink. To see the following screen:

The rights have been applied.

7. Click the [View User Account](#) hyperlink to see:

User Name	WAbulayvi
User Name (pre- Windows 2000)	TRNG\WAbulayvi
Reset Password	Revoke SLG Site Administration rights

Notice that the second message has now changed to **Revoke SLG2 Administration rights**, and as you would expect clicking here removes these rights and reinstates the user's previous permissions.

Manage Registered School Page

This area is of relevance only to an LA or self hosted school wishing to register completely new School sites within the current one.

Basic information about the new school's SIMS database is needed.

07

Making Changes to the Sites



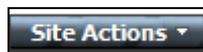
This section contains:

- Introduction
- Themes
- Graphics
- Web parts
- Creating New Pages and Sites
- Governors
- Modifying the Default Student Planner

Introduction

Work in this unit refers in the main to general SharePoint techniques without direct reference or relevance to Capita web parts. It is no more than an introduction to general SharePoint administration and schools wishing to develop their use of the installation beyond the SIMS data surfacing should budget to send a key staff member onto a more general SharePoint course. Capita is one provider of such a course.

The work all starts from the Microsoft® Learning Gateway Administrator permissions which show you the **Site Actions** button.



Site Actions button

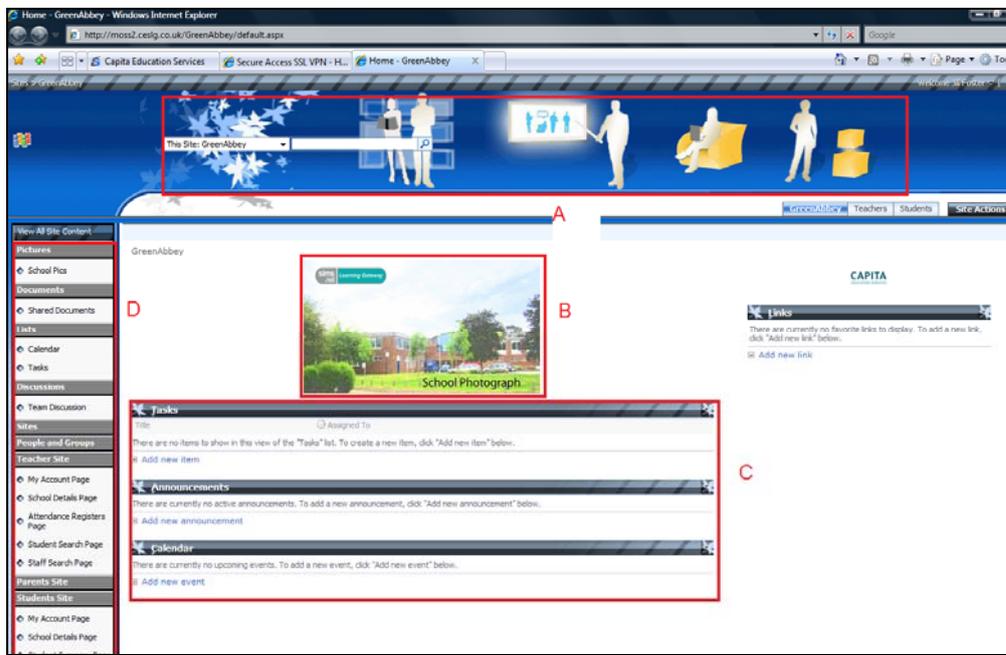
Each site hanging on the hierarchy in *Unit 1* has exactly the same potential as any other. Maintaining the School Home site is no different in principle than maintaining a **Departmental** or **Governors** site within a school.

Your **School** site probably has at least four default sites already a School Home Page, a **Student Home Page**, a **Teachers Home Page** and a **Parents Home Page**. An administrator can add more, e.g. a site for the Geography department or for class 7xMa. The way the site looks is decided by the school and the changes can be carried out by those who have been given the specific rights to do so for that site. It is clearly vital that any new sites created and the ways that information is displayed are carefully planned within the school before such changes are made.

In this chapter, we shall show how to carry out the main tasks that the administrator in charge of maintaining and creating sites, would need to know. You can also make changes using Microsoft® SharePoint Designer software.

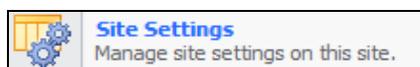
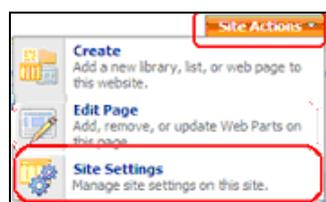
Themes

An important decision about your new site is its look and feel, you can choose a theme for the site, which identifies a colour scheme, fonts etc. You may decide on the same theme for each sub-site of your **School** area, you might decide on different themes for different sites, however, you cannot have different themes for separate pages of a single sub-site.



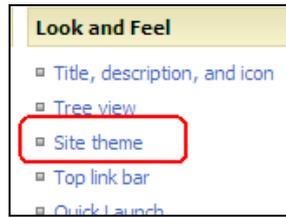
On the site shown in the preceding graphic, the theme is one of the SIMS designed themes (SLGTeachers/Parents) and includes the graphic, the colours and font on the page; there are several of these SIMS themes and there are many more standard themes which come with SharePoint. Your own themes can be designed (see *Unit 8*) or you can make changes to the theme applied by default. You may wish to employ Capita to design your theme for you and will usually have made that decision at the point of purchase but can of course decide to do so at a later date.

1. The way to apply a new theme, as with any other aspect of the design, starts by clicking the **Site Actions** button.
2. From the drop-down list, click the [Site Settings](#) hyperlink to show a page with many options on it, which are largely self explanatory.

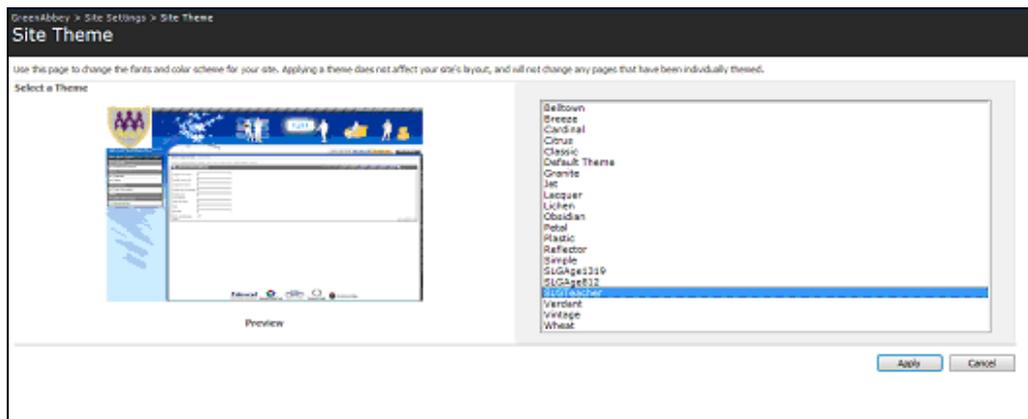


Site Settings hyperlink

- Click the [Site theme](#) link in the **Look and Feel** section.



This then shows the index of themes currently available.



- In the preceding graphic, you can see that the current theme is called **SLGTeacher**. Choose another theme (the thumbnail will change to give you a preview) and click the **Apply** button. You should see the change immediately.

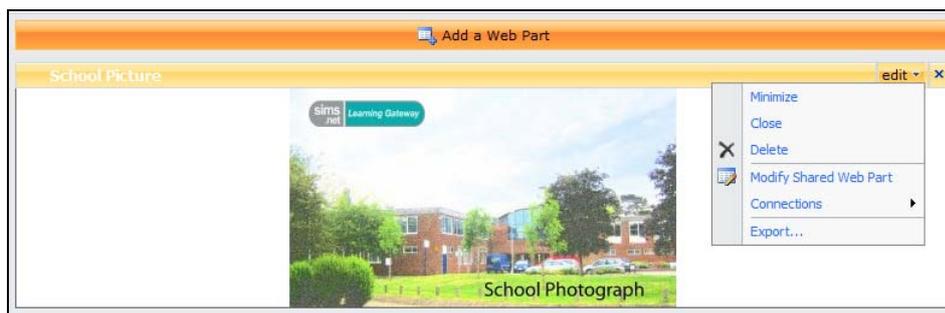
Sometimes caching issues delay the appearance of a new theme. Greater detail about modifying and creating themes is given in *Unit 8*.

Graphics

- Each page on each site is made up of a mosaic of web parts, which can be placed in various places on the page. The following graphic shows the School Photograph as part of an Image web part.
- To change the graphic shown on the web part, click the **Site Actions** button and choose **Edit Page**.

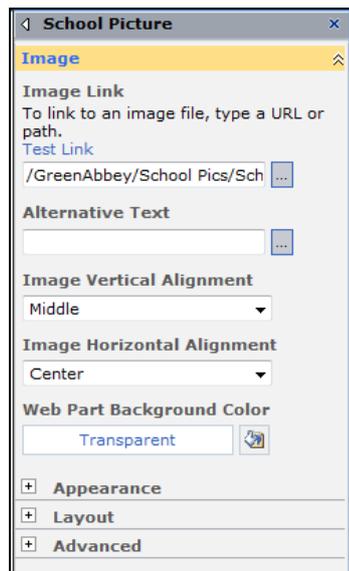


Edit Page hyperlink



The screen changes and the page with its component web parts become available for editing.

3. Click the **Edit** drop-down on the Image web part of the graphic you want to change and then select **Modify Shared** web part.
4. On the right-hand side of the page the properties associated with that web part will appear, including its title, whether it is displayed showing a border (both in the **Appearance** area) and the URL of the picture displayed.

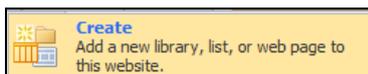


5. By clicking the **browser** button and putting in a web location, any graphic stored on the web can be displayed. However more usually, the school will want to choose a graphic which it has stored in a folder on the **School** site. The way to do this is to upload the image into a Picture Library.



Browser button

6. Click the **Site Actions** drop-down then click the **Create** button and click the [Picture Library](#) hyperlink from the **Libraries** menu. You will then see a self evident screen to set up your picture library. At this point, you can decide to make a link to it on the left hand side of the screen or **Quick Launch** Area. If you choose not to do so at this point so as not to clutter that area up then you would need to find it again via the [View All Site Content](#) link at the top of that **Quick Launch** Area.

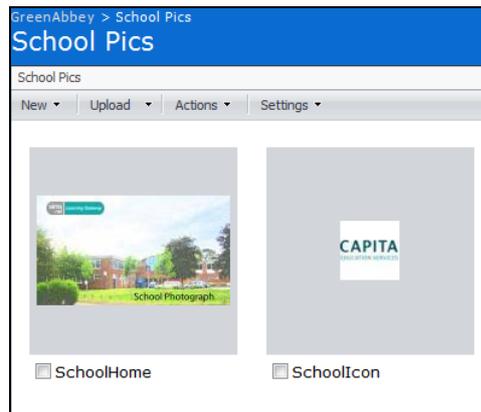


Create button



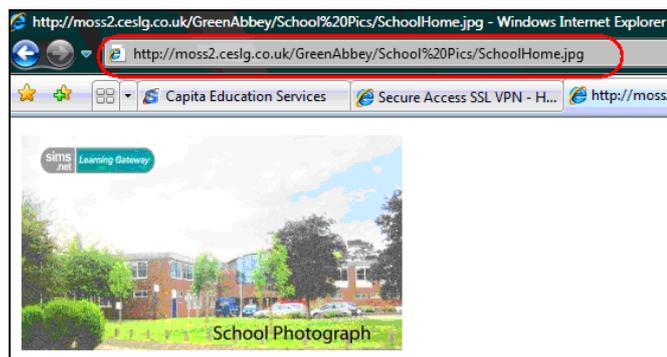
Picture Library link

- Go to the library you have created.



You can then use the buttons shown to create folders and upload pictures; you can also put pictures into this library. One important point to note is that you should resize any pictures you want to use with graphics software before uploading the image to the SharePoint site.

- If you want to use one of these pictures as your image on the web page, you must put the URL of the image in your clipboard so you can use it later:



- To do so, open the picture in the library by clicking it once, then right click it and choose **Copy Shortcut** or, as above, click the picture again to open it in a page on its own then copy the URL of the page.
- Paste this URL into the place described in the Image web part (preceding step 4) and click the **OK** button.
- Click the **Exit Edit Mode** button at the top-right of the screen and the graphic will now be the one you have chosen.



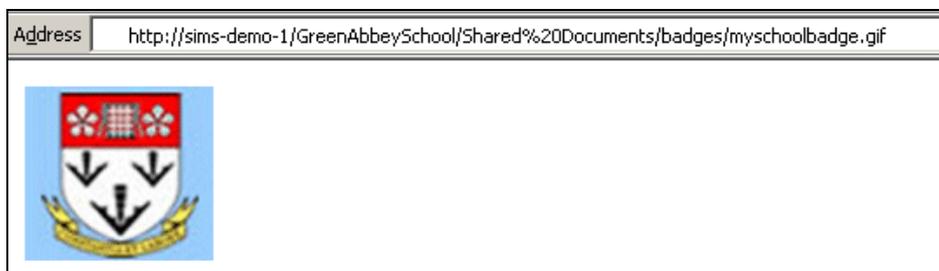
The Site Icon (Jelly Babies) Graphic

1. In the top left corner of each page there is likely to be a default jelly babies graphic:



You can over-write this with your school badge. Ideally this would be a **100x100 pixel gif** with a transparent background. Upload the graphic to the picture library you created above.

2. Right click and **Copy Shortcut** to put its URL in the clipboard or open it in a page on its own and copy the URL.



3. Return to the **School Home Page** and select **Site Actions | Site Settings** and in the **Look and Feel** column of the new page click **Title, Description** and **Icon**.
4. In the **Icon URL** field, copy the URL for your school badge and click the **OK** button to save.

Title:

Description:

URL:

[Click here to test](#)

Enter a description (used as alternative text for the picture):

URL name:

You might also wish to change the displayed title and perhaps delete the rather redundant description. Never change the **URL name** field. This is a site-specific change and must be applied in the same fashion to all other sites independently.

Web Parts

As stated previously, the page you see consists of web parts, including a **Navigation** menu on the left to take you to other pages. You can, with care, add any available web part to any page. Where you can place the web part depends on the layout of the zones on the page, and this is decided by the choice of template when the page was created. It would probably not be advisable in the first instance to add any of the SIMS web parts to a new page, because they often work in a hierarchical structure and might fail outside that structure. Standard SharePoint web parts can be added as follows.

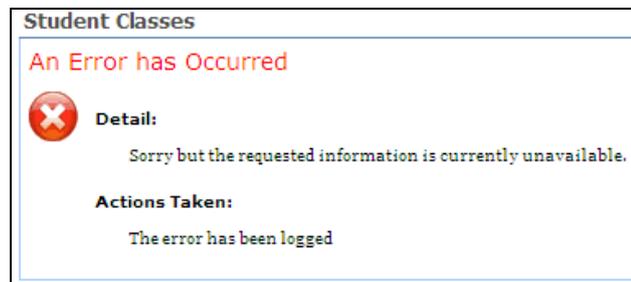
First you need to go to the required page with an Administrator ID. This can be tricky for the SIMS pages because hyperlinks to specific SIMS web part pages will not show to an administrator. There are two ways round this.

If you have access to a valid student, teacher or parent ID you can use this to navigate to the page concerned and then you can change identity by logging in as the administrator.

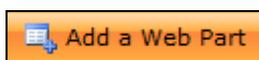
If you do not have a valid other ID you can use the [View All Site Content](#) hyperlink normally visible at the top of the left-hand QLA:



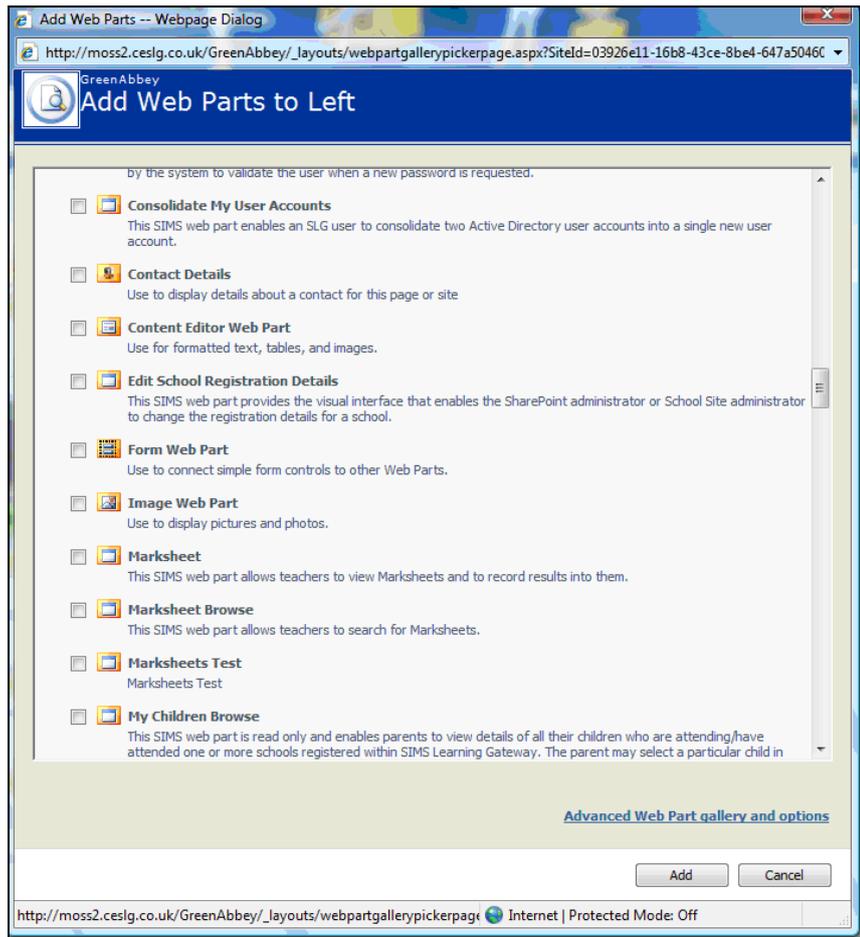
First of all, the following error message is perfectly normal – it means that your identity as administrator cannot surface the specific SIMS data the web part is designed to find. For a Hosted site you will probably just see empty web parts rather than an error:



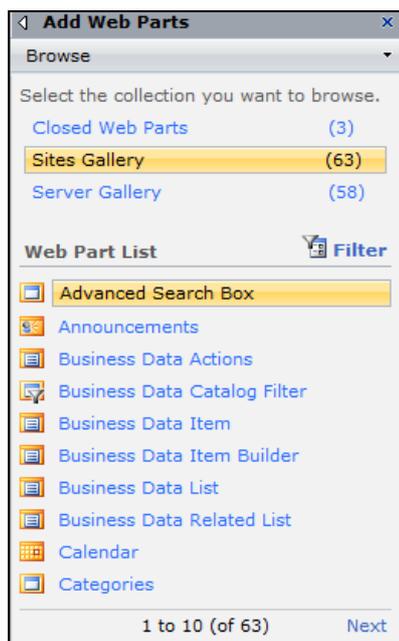
1. Click the **Site Actions** button and then click the **Edit Page** button to enter edit mode.
2. To add web parts to any available zone on the screen, click the **Add a web part** button and a list of the web parts available will appear, with a brief description of what each does.



Add a web part button



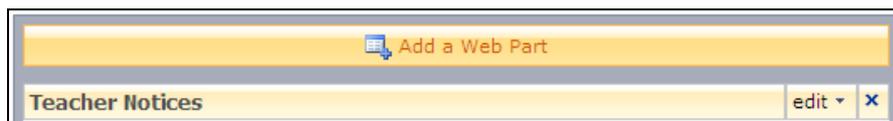
3. You can then select the check box next to the web part(s) you want and click the **Add** button. When you are more familiar with the functionality of the web parts, it is probably easier to click the [Advanced Web Part Gallery and Options](#) hyperlink and the list of available web parts appears on the right of the screen, as shown in the following graphic.



4. You can then more easily drag and drop each web part required into the place you wish. Once a web part is on a page you can alter its location in a zone or even move it to another zone using drag-and-drop.
5. Whilst in **Edit Page** mode, the **Edit** button on each web part allows you to change settings such as its name, type of border or even hide it from view without actually removing the web part from the page.
6. Within some SIMS web parts, there are also specific properties which can be changed to allow or disallow particular items to be shown. These can include the option to show students' details to parents only for children currently at the school, or previous students who have attended the school, or only to show **Achievements** and **Behaviour Details** entered after a certain date. See *Chapter 2* for the methods to adapt these or, for a complete list, find the document entitled *SIMS Learning Gateway Web Parts Handbook*, available on *SupportNet*.

Editing Web Part Displays

After clicking the **Edit** button on any page, each web part displays a control bar similar to the following graphic:



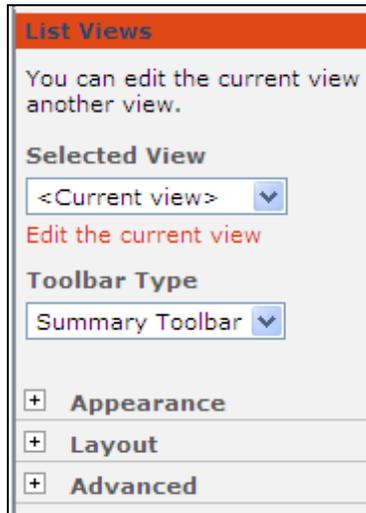
- You can add a web part to the selected zone by clicking the **Add a Web Part** button or edit or delete the existing web part
- You can alter the relative top-bottom positions of each web part in a zone by dragging the top bar to its new location. You can drag web parts across to a different zone the same way.

Click the **Edit** button and then select **Modify Shared web part** to gain full control.

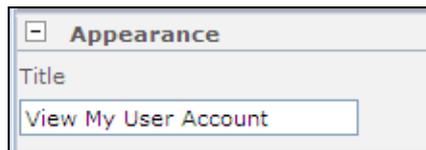


The **Edit** panel for each web part has certain elements constant and others relevant only to the particular web part.

The common features are **Appearance**, **Layout** and **Advanced**:



These are general Microsoft ® controls and a little experimentation will show the effects of each element. The main one to find is displayed in the following graphic.



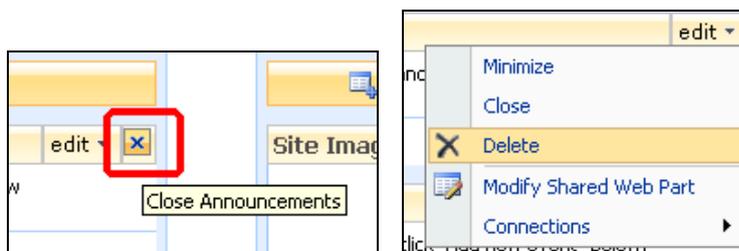
The wording here controls which title is displayed on the web part bar.

The SIMS web parts have other fine controls, different for each one.

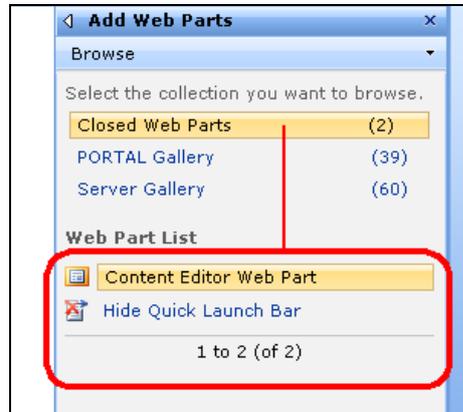


Deleting Web Parts

Never delete any SIMS web parts, normally use **Hide on Page** to hide those you do not want users to see, see *Unit 2* for more details. All web parts allow a soft delete (**Close**) or a hard delete (**Delete**).



If you click the **Close** button then the web part is sent to a folder called **Closed web parts** from which it can be easily retrieved. It will hold onto any information in the web part, e.g. an announcement, graphic or link.



If you click the [Delete](#) hyperlink then the web part is removed in a much more robust fashion. You can always find a replacement in the web parts **Galleries** – but no announcements, graphics, links information etc. will be retrieved – the web part comes back clean.



Creating New Pages and Sites

You can either choose to create new pages in existing sites or new sites which will hang from the one you have created. You may decide that the Governors should have their own site, or that each department at the school should have its own site, or each class or year group within that site should have its own page or series of pages. You may also want there to be a corporate look to each new page or site created - clearly such decisions cannot be taken in isolation but will need considerable planning before implementation.

The process of web design is beyond the scope of this booklet, but the initial stage of some simple changes is to click the **Site Actions** button, then the **Create** button, and then choose the most appropriate of the options shown here.

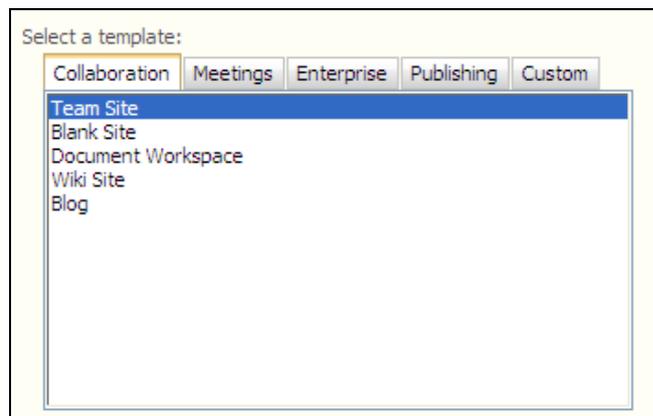


The following screens then lead you through the process of page or site creation.

1. Click the [Sites and Workspaces](#) hyperlink which will offer a variety of pages already designed with basic web parts such as announcements, links etc.

A screenshot of a web form for creating a new site. The form has a light yellow background. It contains three main sections: "Title:" with a text input field containing "My New Site"; "Description:" with a large text area and vertical scrollbars; and "URL name:" with a text input field containing "http://trng.capita-cso.co.uk/GreenAbbey/mynewsite".

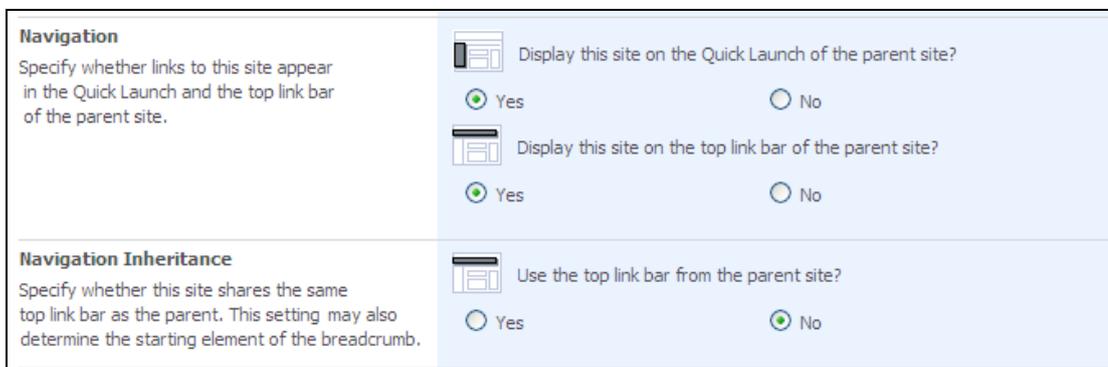
2. Complete the basic details – it makes sense to have the site name and its URL identical but avoid spaces in the URL; there is no need to add a description, but if you do it will appear on the site.
3. Lower down the screen you may want to experiment with various templates (including some you may have saved as your own Custom templates (self hosted sites only) but the Team Site is a good starter.



- You need to decide whether or not the new site inherits the same group access permissions as its parent:



- If you use the same permissions, everyone who reaches the higher site will also get to your new one. If you use unique permissions you can limit entry to the new site to other groups or individuals.
- You can have the new site show the same tabs as its parent or only show tabs lower down its own internal structure. Experimentation will show you which you prefer.



- Make your permissions choices and click the **Create** button and wait for the site to be processed.

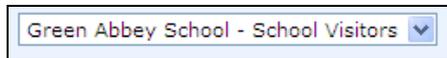
If you selected **Same Permissions as parent site** you are taken straight to the new Home Page for the site.

If you selected Unique Permissions you have an extra screen where you choose the people who can access the new site.

You have choices in three areas:



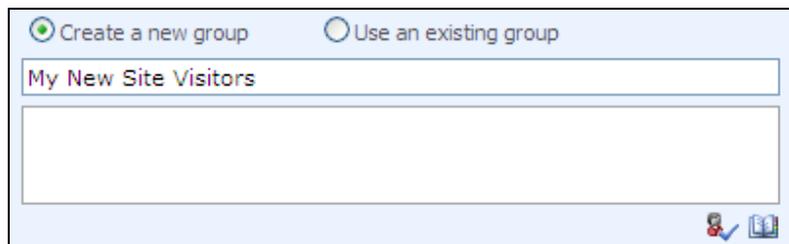
8. You would normally only add new groups into the **Visitors** section, leaving alone the defaults for the final one and occasionally adding trusted users into the Members Group, e.g. teachers if you want them to be able to change Announcements etc.
9. By default, the **Visitors** section will have a group called **School Visitors**.



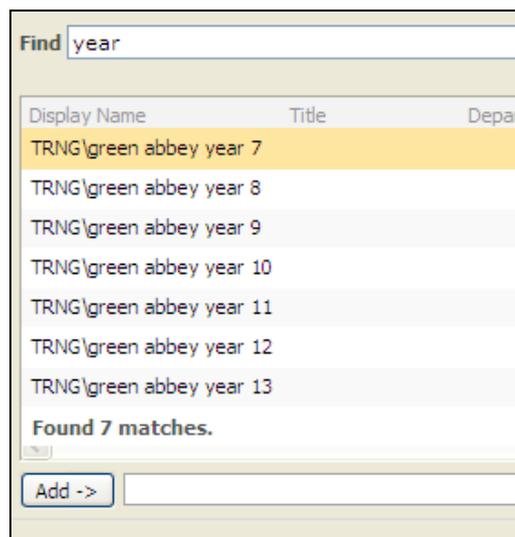
10. You will want to fine tune this access by specifying a more restricted grouping, e.g. if you create a site Key Stage 3 Students, you do not want anyone else having access.
11. To complete this fine-tuning click the **Create a new group** radio button and then click the **Browser** icon which appears:



Browser icon

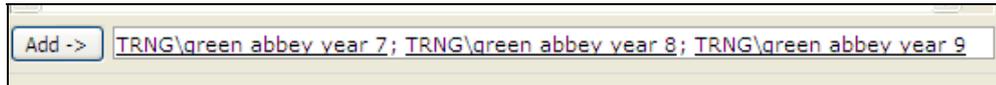


12. Type part of the name for the group you are seeking and select from the displayed list. Here we are searching for **Year** and were offered all year groups as exported to AD:

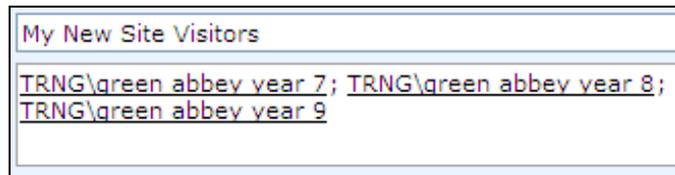


The list of possible groups available depends on whether their capture from SIMS has been enabled see *Chapter 9*. Note that, in addition, on a hosted site, even when captured they will not necessarily appear as a list such as that above so they can be chosen until they have been used once. It will probably be necessary to type them in on the screen (step 11) and click the **tick** icon in order to use them. This is an issue in that the name must be typed exactly correctly.

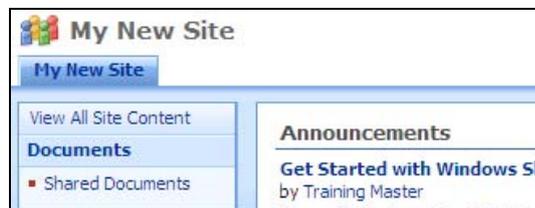
13. If the new site was a **Key Stage 3 Student** site you would double-click the **Year 7**, **Year 8** and **Year 9** lines in turn to add them:



14. Click the **OK** button and they are added to the correct access group:



Finally click the **OK** button and you are taken to the Home Page of the new site.



15. You can then select a theme to affect the look and feel of the site.

Governors



NOTE: the ability to create and automatically maintain an AD group for Governors will be available with the October Main Release of SIMS and SLG2 (7.124).

One group which most schools will want to allow access to a new dedicated part of the school SLG2 site is Governors. They are not exported as a group from SIMS and so a different approach has to be followed.

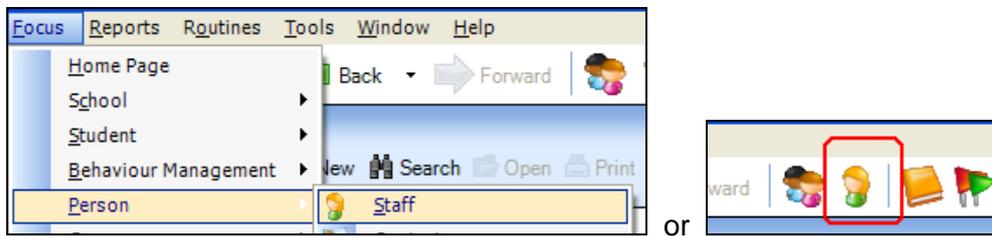
Some Governors will already be staff members as a teacher, parent or support staff. In this case they will be sent through the AD Provisioning routine and will have an identity in SLG.

On a Self Hosted site, a new user can be created directly in AD, but either because yours is a Hosted site and/or if you wish the governor to see SIMS data, he/she will have to have a SIMS identity created manually and then the AD Provisioning routine will send them to SLG2 as individuals who can then be given access to the Governors' site.

These SIMS IDs will not (necessarily) be given a SIMS password – so they will not be able to get into SIMS unless the school wishes it. The credentials are used only to allow an ID in SLG.

This is the process:

1. Add a new user into SIMS:



2. Click the **New** button.
3. Complete the **Basic Details** and click the **Continue** button.

The 'Basic Details' form contains the following fields: Surname (Bloggs), Forename (Fred), Gender (Male), and Date of Birth (10/08/1972). A 'Continue' button with a green arrow is located at the bottom right of the form.

4. The next screen has many fields which could be completed. Schools should decide whether or not to include the new person as part of the School Workforce Census information. If you do not want to do this deselect the **Eligible for SWC** check box in **Basic Details**.
5. For our purposes, the critical section is **Employment Details**. Here you should complete as follows:

The 'Employment Details' form is divided into three main sections:

- Teaching Staff:** Includes a checkbox for 'Teaching Staff', 'Teacher Category', 'Continuous Service Start', 'Employment Start' (10/04/2008), 'Staff Code', and 'Next Employer'. It also has fields for 'Teacher Number', 'Qualified Teacher Status', 'Local Authority Start Date', 'Employee/Payroll No.', 'Previous Employer', and 'Date of Leaving'.
- Check:** A table with columns 'Check', 'Clearance Date', and 'Clearance Level'. To the right are 'New', 'Open', and 'Delete' buttons.
- Contract:** A table with columns 'Status', 'Start Date', 'Post', 'Service Term', and 'Scale Point'. To the right are 'New', 'Open', and 'Delete' buttons.
- Service Agreement:** A table with columns 'Start Date' (10/04/2008), 'End Date', and 'Agreement Hours/Week'. To the right are 'New', 'Open', and 'Delete' buttons.

6. Make sure there is an **Employment Start Date**.

7. It is not necessary for the purpose of creating the new user, but if you wish click the **New** button to create a new Service Agreement with the following **Reason**:

Reason	School Governor
Sourced By	Supply Volunteer
Service Type	School Governor

8. Use this **SWC Post** entry:

SWC Post	Support Staff
	Deputy Head Assistant Head Classroom Teacher Advanced Skills Teacher Excellent Teacher Support Staff

Add the following service agreement **Role** and **Start Date**:



Add Service Agreement Role

Role: Do not include in Statutory Returns

Start Date: 10/04/2008

End Date:

OK Cancel

9. Click the **OK** button.
10. Click the **Save** button for the **Role Definition**.
11. Click the **Save** button again for the whole new person record.

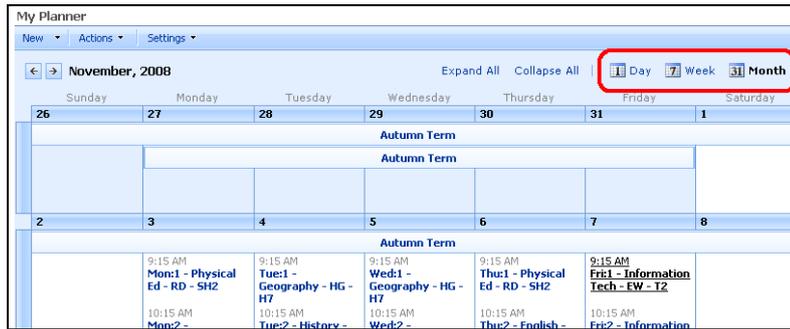
This identity is now available for AD transfer to SLG2 like anyone else. Once transferred, they can be included as members of a newly created Governor's site.

Teacher/Student Planner Defaults Settings

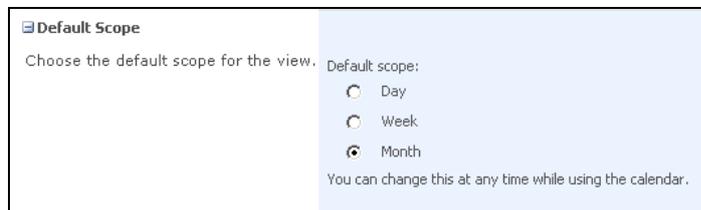
See *Unit 2* for a technique to ensure that students do not see SIMS Diary information as part of their **Planner** display.

By default the **Teacher** and **Student** planners open in a **Monthly** view. You can change this (for every user) to a **Weekly** or **Daily** view if you wish.

1. To change the **Planner Default View** click the **Students/Teachers** tab.



2. If you wish to change the default, select **Site Actions | Site Settings | Site Libraries and Lists | Customize My Planner | Calendar**.



3. Here you can select a new **Default View** and click the **OK** button to save your choice.
4. The user can still alter any **Default View** from the choices in the top right corner of the Calendar.

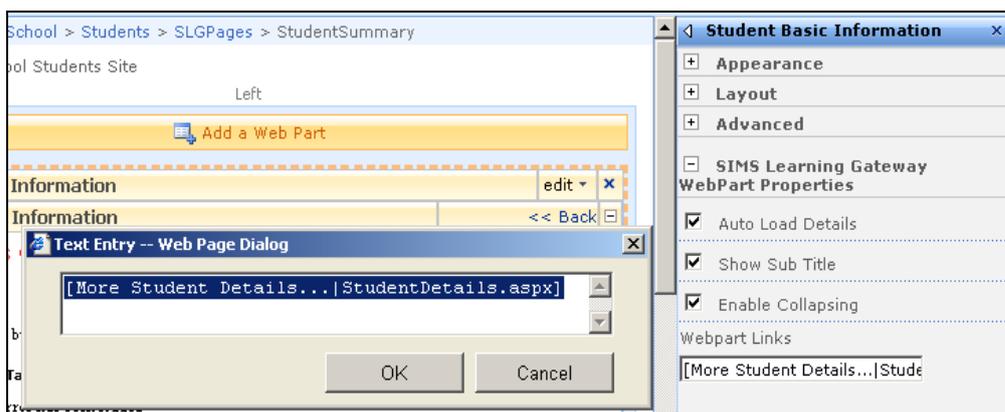
Deleting Hyperlinks

Several Capita web parts on the **Student Summary** page have hyperlinks which schools might wish to disable. This section summarises the original hyperlink text along with its location.

Web part: Student Basic Information

Target: Student Details Page

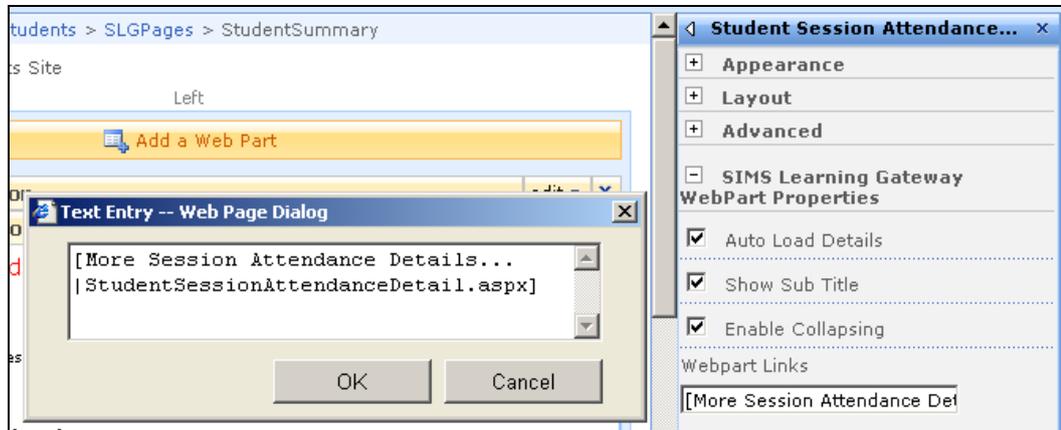
Text: [More Student Details...|StudentDetails.aspx]



Web part: Student Session Attendance Summary

Target: Student Session Attendance Detail page

Text: [More Session Attendance Details...|StudentSessionAttendanceDetail.aspx]

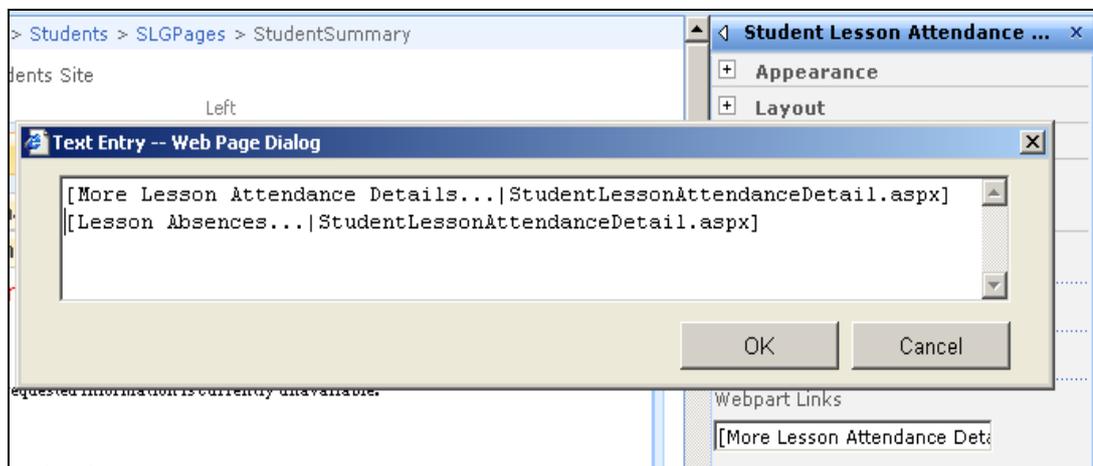


Web part: Student Lesson Attendance Summary

Target: Student Lesson Attendance Detail page

Text: (There are two hyperlinks here, but both have the same target)

- [More Lesson Attendance Details... |StudentLessonAttendanceDetail.aspx]
- [Lesson Absences...|StudentLessonAttendanceDetail.aspx]



Web part: Student Classes

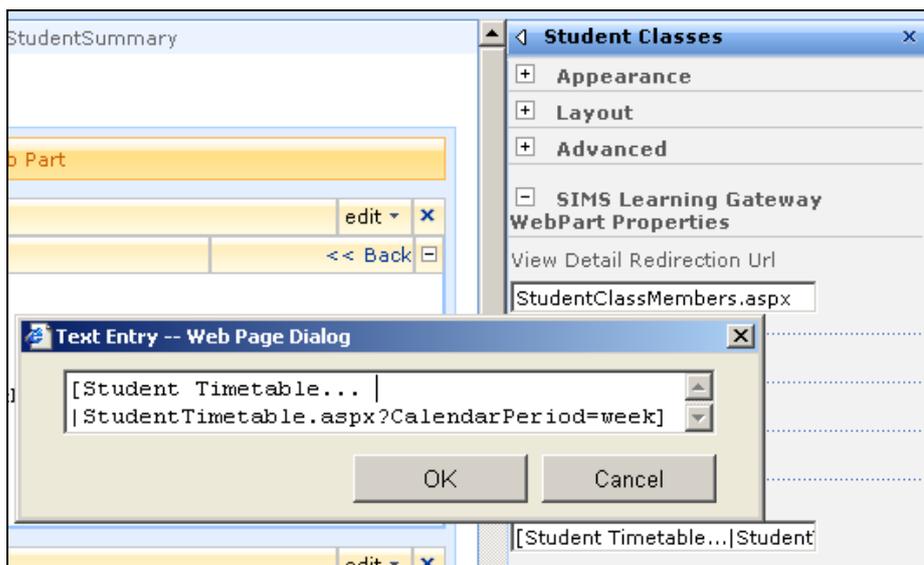
Target 1: Student Class Members page

File – with names of other children in the class

Text: StudentClassMembers.aspx

Target 2: student Timetable page (clean)

Text: [Student Timetable...|StudentTimetable.aspx?CalendarPeriod=week]



08

Managing Themes



This section contains:

- Managing Themes

You will probably want to replace the default banner graphic across the **School**, **Student**, **Teacher** and **Parent** Home Pages, using your own colour scheme and logo.

You can have different banner graphics on each page or the same banner everywhere.

The default banner graphics are stored as part of the theme for the site, and by replacing the default graphic in the **Theme** folder you should easily achieve the effect you want.

- If your school hosts the SLG2 server you can do this yourself
- If the LA or Capita hosts the server you need to prepare a **Theme** folder (from the sample left by your consultant) and email it to your host for inclusion and indexing.
- You can also employ Capita to design your theme for you.

Standard SharePoint Themes

On a standard **SharePoint** page the top layout looks similar to this:



The shield graphic can be easily changed, but the background area is quite plain. We have altered all the standard SharePoint themes to allow the inclusion of extra graphics:



Your consultant may have provided the SLG2 variants on the SharePoint standard themes. The installation and indexing of themes for Hosted schools is controlled by Capita – see *Unit 10*.

You can alter the actual graphics quite easily.



Graphic A is called **titlegraphic.gif** and is stored on the SharePoint server in the location:

```
C:\Program Files\Common Files\Microsoft Shared\web server
extensions\12\TEMPLATE\IMAGES
```

Initially it is constant across all site pages. This is an advantage for a single school site installation, but for a LA installation the same graphic, e.g. the LA badge would appear on all School sites. Individual schools can make a local change if they wish – *Unit 7 - The Jelly Babies Graphic*.

Graphic B is called **logo.gif** and must be stored on the web server in the location:

```
C:\Program Files\Common Files\Microsoft Shared\web server
extensions\12\TEMPLATE\THEMES\MyTheme (where MyTheme is the specific
name of your theme).
```

Clearly this is only possible on a Self Hosted school, or if you have a local copy of SharePoint.

If it is missing, this is not fatal to the display – you simply get a plain background instead.

The graphic at A and the text next to it can be altered through the following route in sequence:



Site Actions drop-down



Site Setting



Look and Feel link



Title box

This page allows schools to customise the badge shown at A in the preceding graphic by storing the required picture and putting its URL details in the field:



If this field is blank then the generic preceding graphic (beneath the Heading Standard SharePoint Themes) will display. If you want to vary the graphic we recommend storing it in a **Picture Library** in the **School** section of your site – because all users have permission to access this page, graphics stored there will also be available for display on their other pages.

Modifying an Existing Theme

The **Theme** folders are stored on the SLG2 server and new themes for Hosted schools must be processed by Capita – see *Chapter 9*.

There are sub-folders for all SharePoint default themes plus those designed by Capita (which start with SLG). Three SLG2 themes have been radically re-designed:

- SLGTeacher (Teacher site/Parent site)
- SLGAge1319 (Secondary Pupil Site)
- SLGAge812 (Primary Pupil Site).

There is no SLG2 theme for the Parents' site.

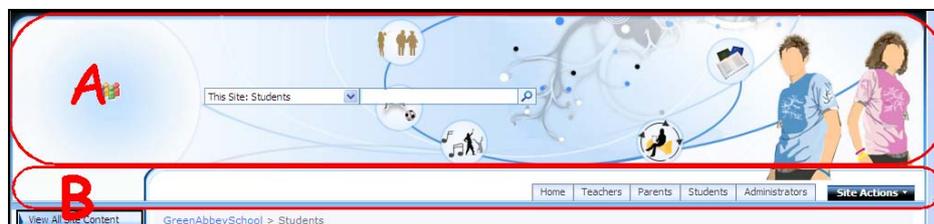
The key graphics (which a school would need to change to produce its own look and feel) are named differently between the SharePoint and these three SLG2 theme folders.

In these SLG2 pages the key banner graphic is actually made up of two pictures:

Teacher Site:



Secondary Student Site:



The graphic names are the same in each subfolder (though the actual graphics change) and are called:

- A **globaltitlearea.jpg**.
- B **bannerContainer.gif** (this gif has the colour white set to transparent, so your site background colour may also need altering as it is designed to allow the tabs to show on a plain background).

You can substitute your own pictures if you wish, but we recommend archiving the original (by calling it **banner_old.gif** for example) and then storing your own in the same folder using the original name.

When the theme has been processed by Capita you should be able to apply it from the index.

Defining a New Theme

To create a brand new theme, you need to create a new folder with the images and files that make up the theme; you can preview them within your SharePoint site as you work. Clearly this is only possible on a self hosted site or if you have a local copy of SharePoint.

Here are the basic steps to create a new theme called School1.



NOTE: Upgrades to SharePoint might overwrite changes you make here, so you might want to take a back-up of key files and folders later.

1. First, make a working copy of the new **Theme** folder, navigate to the **SLG2** folder collection which may have been provided by your training consultant.

```
C:\Program Files\Common Files\Microsoft Shared\web server
extensions\12\TEMPLATE\THEMES
```

2. Pick any one of the existing folders, remembering that there are three main types of choice:
 - Standard SharePoint
 - SLG2 SharePoint variants (with graphics)
 - SLG2 other – more radical changes in layout.
3. Make a copy of it in the same directory by **Copy** and **Pasting**. Rename the copy `School1`.
4. Second, modify the files and filenames for your theme. In your **Theme's** folder, rename the *******.INF** file to `School1.INF`. This name must match your folder name exactly.
5. Open this **INF** file to edit the title of your theme.

[info]

```
title=School1
```

6. Do not change anything else – save the **INF** file.
7. Use a graphics editor programme such as Paint Shop to open the key graphics files (**logo.gif**) – edit or replace as you need, but keep the names the same. Remember that deep graphics will force the bottom edge of this section of a page further down the screen, making scrolling essential – shallower graphics (less tall) will avoid this. Aim for a maximum height of about 100 pixels.

8. Other gif files control the colours and gradations visible – changing these elements is beyond the scope of this training manual.
9. Finally, after Capita processing, you will be able to apply the theme to your SharePoint site.
 - a) Select **Site Actions | Site Settings**.
 - b) Click the [Site Theme](#) hyperlink.
 - c) Choose the name of your new theme from the index and click the **Apply** button.
 - d) You may need to clear your internet cache (**F5/Ctrl** and **F5**) before the final new theme is seen.

Notes for Hosts (LA or Capita)

Sometimes the LA or Capita will host the SLG2 server. In this case a school would design their own theme (based on a sample left by their consultant) and send it to the host for Inclusion and Indexing.

Inclusion

The schools should provide a folder called, for example, **MySchool** which includes:

- logo.gif (essential)
- a MySchool.INF file
- a theme.css file.

There will also be dozens of other, untouched files in the folder. This entire folder should be copied by the host to the location:

```
C:\Program Files\Common Files\Microsoft Shared\web server
extensions\12\TEMPLATE\THEMES
```

Indexing

Before the theme can be chosen by a school it must be added to the **Index** file **SPTthemes.xml** which can be found here:

```
C:\Program Files\Common Files\Microsoft Shared\web server
extensions\12\TEMPLATE\LAYOUTS\1033
```

Here each theme has a similar seven line entry and the host must create an entry for the school:

```
<Templates>
<TemplateID>MySchool</TemplateID>
<DisplayName>MySchool</DisplayName>
<Description>Add your own brief description here</Description>
```

<Thumbnail>images/MySchool.gif</Thumbnail>

<Preview>images/MySchool.gif</Preview>

</Templates>

The school should have provided the file **MySchool.gif** as a **375 x 231** pixel thumbnail. This should be stored in:C:\Program Files\Common Files\Microsoft Shared\web server extensions\12\TEMPLATE\IMAGES.

The server should be restarted with iisreset for the changes to be applied.

Errors in the graphics or colour scheme should be referred back to the school.

Content Editor Web Part

A more direct and temporary way of effecting changes in the style of your page, may have been demonstrated by your training consultant, using the CEWP in conjunction with style adjustments in the extra training document **Theme Changes.doc** – which may have been provided by your consultant.

This is a powerful way of applying style information and seeing its effects straight away.

However, this should only be a temporary experimentation. When you have found style changes you like you should copy their class sections to a **Theme** folder and have it processed by your host.

09

Capita Help Desk



This section contains:

- Introduction
- Getting Started
- School Theme
- Provision More Groups

Introduction

- Each Hosted school has to log at least one Help Desk case with Capita for the processing of their school theme
- Some will also want to ask for greater granularity in the group information provisioned from SIMS.

Getting Started

1. Phone the **Help Desk** on **0845 600 2785**.
2. Say you are logging a new case.
3. Give the school post code and name.
4. Give your name as main contact for the case.
5. Be prepared to give your SIMS version, e.g. **7.132** or **Summer 2010 release**.
6. If asked for your SLG2 version – you do not know this because it is the Hosted Service - say it is a SIMS Hosted Learning Gateway issue – all SLG2 cases are dealt with by Bedford, even if you get your general SIMS Help from a local centre, e.g. your LA.
7. Give them your server **URL** details, e.g. **hslg3**.

School Theme

1. **Case title:** Request that SLG2 theme is processed for **Fred Bloggs Academy**.
2. **Extra info:** Theme files to follow.
3. **Ask for a Case Number** – use this as the key to follow up if necessary.

Then:

4. Make a zipped folder of the theme components (your consultant may have done the first one).
5. Send a new email to sims.support@capita.co.uk with the Case Number in the **Description** field, e.g. Case: 0810-123456 Install SLG2 theme for Fred Bloggs Academy.
6. Attach the zipped folder.
7. Wait to hear back that Capita have installed and indexed the theme for your use (expect turnaround time of about five working days).
8. You will then find your theme in the **Index** list and you can apply it to any page you wish.

Provision More Groups

- The Provisioning Service creates an ID and password for use within SLG2 and also collects group information about each user
- By default this will be at the broadest level of Staff Member, Teacher, Parent or Student
- You can ask for greater granularity in this group data if you want to target information within SLG2 to Year 8 parents, SIMS subject co-ordinators or students in Academic Class 7x Sc3
- These are probably your default settings:

Home >> Clients >> Registered Clients >> Client Details

CLIENT DETAILS sims net supporting schools

General | **AD Groups and OU** | Mapping | Username Formats | Exchange Server Details

Set AD Groups details

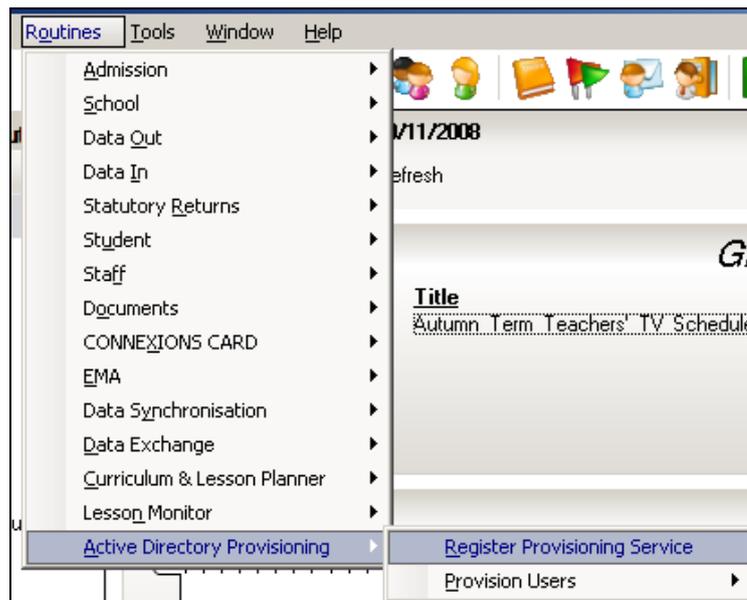
SIMS Type	Active Directory Type and Scope
Agent by Agency	Do not create AD groups
All Parents	Security - Global
All Staff	Security - Global
All Students	Security - Global
All Teachers	Security - Global
Parents by Cohort	Do not create AD groups
Parents by Year Group	Do not create AD groups
Pupils by Academic Class	Do not create AD groups
Pupils by Cohort	Do not create AD groups
Pupils by Registration Group	Do not create AD groups
Pupils by School Houses	Do not create AD groups
Pupils by Year Group	Do not create AD groups
SIMS System Manager Groups	Do not create AD groups
SLG Site Administrators	Security - Global

Set organisational unit details

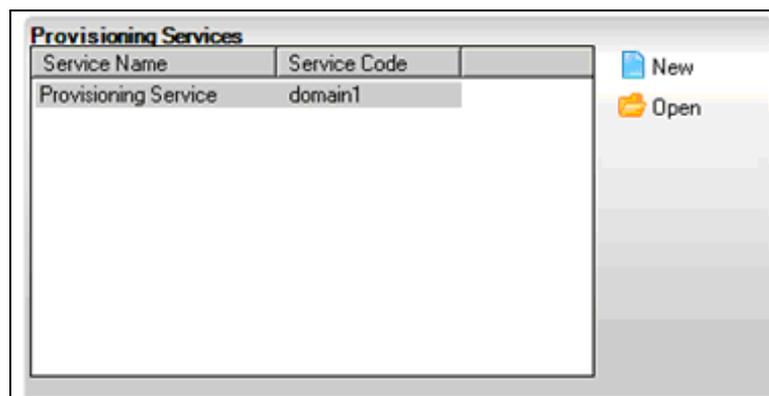
1. If you want to target messages in SLG2 to any of the other groups you must request a redefined xml file from Capita.
2. **Case title:** Request that new **xml** file is provided for Group Granularity in SLG.
3. **Extra info:** Please provide new **xml** file to include the following extra groups:
 - Parents by Year Group
 - Pupils by Academic Class
 - SIMS System Manger Groups etc.
4. Ask for a **Case Number** – use this as the key to follow up if necessary.
5. Wait for new **xml** file information from the Help Desk and save it to a convenient temporary store place.

Then:

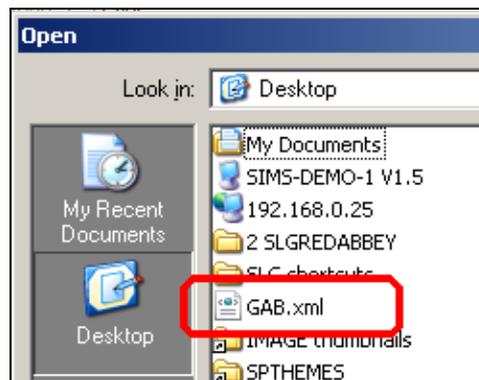
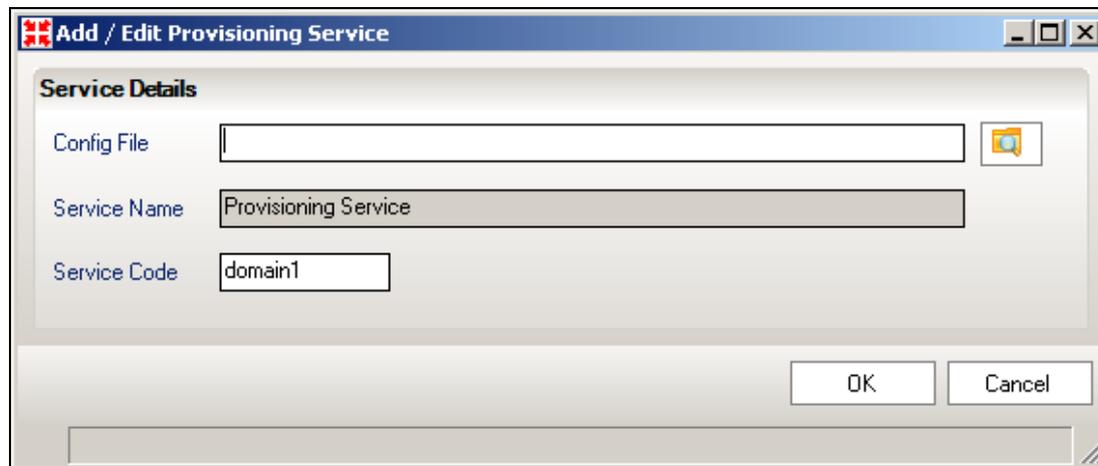
6. In SIMS select **Routines | Active Directory Provisioning | Register Provisioning Service:**



7. Click the **Open** button.



8. Browse to the store place of the **xml** file:



9. Click the file and then click the **OK** button.

There is no final save. You will be shown a screen outlining what the settings are. Click the **OK** button again. The next time your ADP Scheduled Task runs it will send the new group information. It will bring existing users up to date and it will send all group information for new users. This is a very powerful option to invoke in that it will from then on allow you to allocate any resources you have on SharePoint not just to the broad groups of students, staff, teachers and parents, but any of the groups from the selection you made on the previous page, and, more importantly, those permission groupings will be maintained via changes made in SIMS which feed through into the AD whenever the **adpscheduledprocesses** task is run, therefore increasing enormously the potential to use SharePoint as a very powerful content management system.

A

Appendix A - Libraries and Documents



This section contains:

- Introduction
 - Creating a Document Library
 - Adding a Document to a Library
 - Extra Columns
 - Checking Documents In and Out
 - Alerts
-

Introduction

Work in this unit refers in the main to general SharePoint techniques without direct reference or relevance to Capita web parts. It is no more than an introduction to general SharePoint administration and schools should budget to send a key staff member onto a general two day *Microsoft SharePoint Administrator* course. Capita is one provider of this course.

A primary aim of SharePoint is to allow the storage, viewing and editing of a single master copy of any document, therefore simplifying document retrieval and version control.

To allow this functionality, documents are stored in Libraries and the ability to change documents is controlled through group permissions.

You can tag a document with a special property, which means that only the person who checks out the document can make changes until the revised version is later checked in. Change dates can be automatically recorded along with the ID of the Editor. Administrators have the power to reinstate earlier copies of documents if necessary.

An administrator can set up an Alert System to warn them via email when changes are made to a document.

Several of the default site templates include a **Shared Document** area, which is a Library.

By making a Library available you create a structure to hold documents for others to add to, use, check out and check in.

You can create Libraries for Documents, Pictures (includes a slideshow viewer) or Forms.

Creating a Document Library

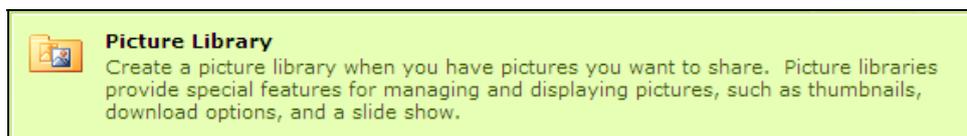
Each site created from the Team Site Template will have a default Shared Documents Library visible in the QLA of the Site Home Page. From time to time you may wish to create new **Library** areas for specialist purposes. The process is described next.

1. From your Home Page of the selected site, click the **Site Actions** button and then click the **Create** button.

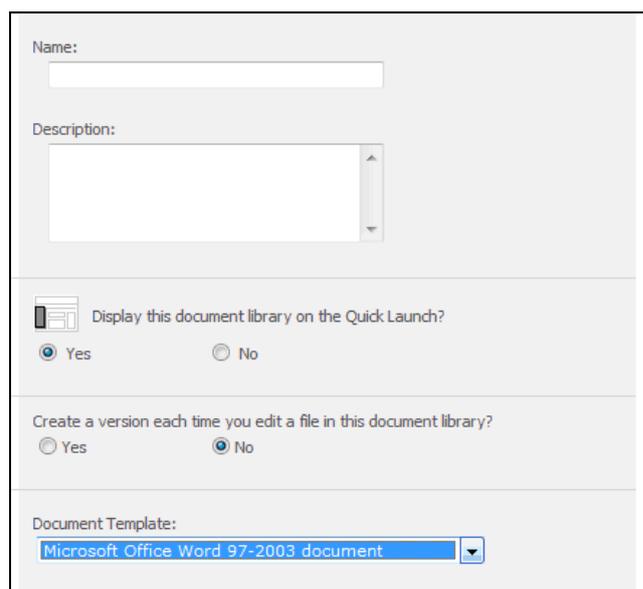
You are offered a variety of Libraries:



Hovering over each choice gives some basic information about it:



On the next page you have some basic decisions to make:



A screenshot of a form for creating a document library. The form has the following sections:

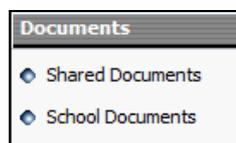
- Name:** A text input field.
- Description:** A text area with a vertical scrollbar.
- Display this document library on the Quick Launch?** A question with two radio buttons: 'Yes' (selected) and 'No'.
- Create a version each time you edit a file in this document library?** A question with two radio buttons: 'Yes' and 'No' (selected).
- Document Template:** A dropdown menu with 'Microsoft Office Word 97-2003 document' selected.

2. At this point it will be a good idea to choose the **Yes** radio button in the **Document Version History** section, so that you can keep track of change made to any document, but this setting can be changed later.

The most curious decision here is the final one, the default document type for new documents. You should create different Libraries for Word docs, pictures, spreadsheets etc. You also have the option of making a **Library for Office 2007** files only or for **Office** files from earlier versions. You can also select **None**.

Later you will see that you can bring documents into a Library either by importing one previously saved (recommended) or by creating a new one on the fly and saving it direct to the Library. Trying to write a new document forces it to be only of the type you specify here, importing allows any document format to be included in the Library and is preferred because of its greater flexibility, though you may wish to keep strictly to the rule one document type per Library, in which case you might want to reflect this in the library name, e.g. Word 2007 Library.

3. After making your choices click the **Create** button to save them, your new Library will now be visible on the Home Page along with the default **Shared Documents Library**, it is an empty shell to start with:

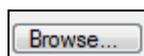


Adding a Document to a Library

1. From your Home Page click the name of your **Library (QLA - Documents)**. Here we are using the Library called **School Documents**.
2. Click the **Upload** button to start a Browser routine to locate a previously saved document.



Upload button



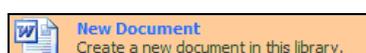
Browser button

3. When your document details are in the browser path, click the **OK** button to upload to the Library.
4. If you have several relevant documents you can click the **Upload Multiple Files** button to bring in the whole batch, they must be saved in the same folder of your computer.



Upload Multiple Files button

5. As mentioned earlier it is also possible to create a new document on the fly, though only of the default file type specified when you set up the Library initially. It is more practical and more flexible to use the Upload routine.

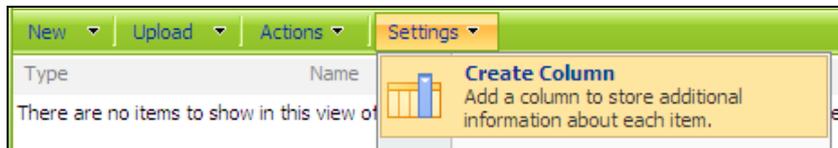


New Document button

Extra Columns

You might wish to add an extra **Display** column for each library, for example, to show whether a document is Read Only or can be checked out for comment and editing.

To do this, navigate to the main **Library** page and select **Settings | Create Column**.



Give the column a name and select its type from a wide range, some of which have set-up decisions to make:

Column name:

The type of information in this column is:

Single line of text

Multiple lines of text

Choice (menu to choose from)

Number (1, 1.0, 100)

Currency (\$, ¥, €)

Date and Time

For example, Choice gives the options of radio buttons, drop-down menu etc.

Description:

Require that this column contains information:
 Yes No

Type each choice on a separate line:

Display choices using:
 Drop-Down Menu
 Radio Buttons
 Checkboxes (allow multiple selections)

Allow 'Fill-in' choices:
 Yes No

Default value:
 Choice Calculated Value

Add to default view

Finally, click the **OK** button to save the choice and for all new documents the importer/creator has to complete the information for this new column.

The selected information is displayed in the new column:

Type	Name	Modified	Modified By	Status
	Bedford Folk Music Club NEW	11/01/2008 10:12	Training Master	Read only

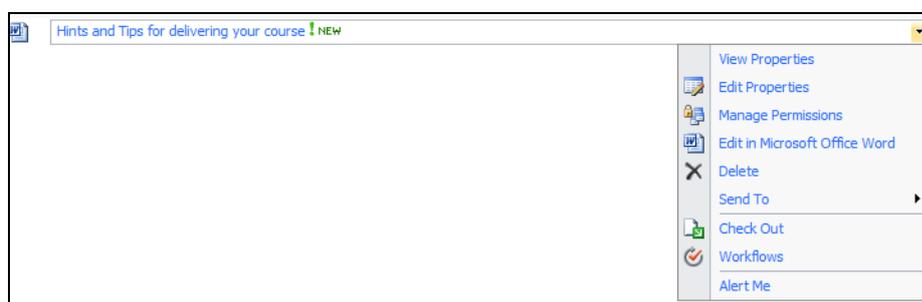
Checking Documents In and Out

Your Library can simply be a storage location for documents – but you might want it to be a workspace as well – where documents can be altered by different people.

In WSS3 these workspaces are intelligent – they will prevent two people working on a single document simultaneously, and they will keep track of who made alterations and will hold different versions of the same document to allow an audit trail.

You can prevent anyone else working on your chosen document by using the Check Out routine. As with a normal library, the document is then linked with only your name and until you use the Check In routine no-one else can take and alter a copy.

1. From your Home Page, click the name of your **Library** and then hover over the name of your document to trigger a **drop-down** button.



2. Click the drop-down to reveal your choices and select **Check Out**. You will then see that the Word graphic for the document has slightly changed, to indicate it has been checked out, and that if you hover over the graphic, it will tell you who it is checked out to.

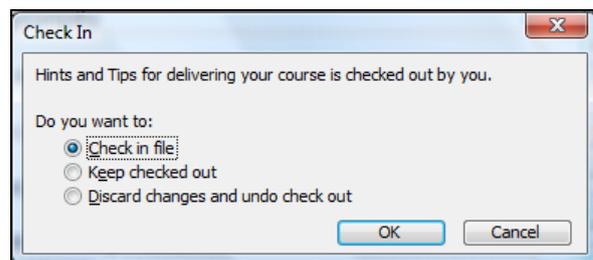


- Next you must hover over the document name again and this time select **Edit in Microsoft Office Word** - the system automatically prompts for Word, Excel etc.



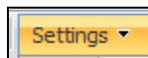
- You will be prompted for your password again before the document will open. After making your changes, clicking the **Save** button will store the new file back in your site – or you can choose **Save As...** to save somewhere else on your own computer.

When you close the editing programme you get an extra panel asking about the Check In routine, you will also be prompted for any comment on the changes you have made:

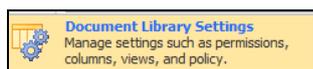


You can also **Check In** from the drop-down menu discussed earlier.

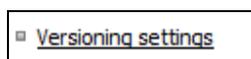
- If you want to see the version history, i.e. how the document has changed and the comments made by each contributor as they check the document in, you must click the **Settings** button, then select the **Document Library Settings** button. Under **General Settings**, click the [Versioning Settings](#) hyperlink and choose the options you require.



Settings button



Document Library Settings button



Versioning Settings link

Create a version each time you edit a file in this document library?

No versioning

Create major versions
Example: 1, 2, 3, 4

Create major and minor (draft) versions
Example: 1.0, 1.1, 1.2, 2.0

Optionally limit the number of versions to retain:

Keep the following number of major versions:

Keep drafts for the following number of major versions:

- Having done so, the drop-down list for the document will then contain the option of **Version History**, and will allow the user to see the various versions of the document so far:



Version History button

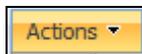
Delete All Versions				
No. ↓	Modified	Modified By	Size	Comments
2.0	05/11/2007 12:18	Jill Foster	69 KB	slight change
1.0	05/11/2007 12:12	Jill Foster	69 KB	slight change made

Alerts

An Alert is a tool to warn users about changes to a document, list or library. An Alert can also warn of new additions to lists and libraries.

The way to create an Alert is quite straightforward and is common to all documents, lists and libraries. The example here is for the Shared Documents Library which is part of the Team Site Template.

- From your Home Page click a **Document Library** in the **Documents** section of the **QLA**.
- Click the **Actions** drop-down then click the **Alert Me** button.



Actions button



Alert Me button

3. On the next page, make your choices about where, how frequently and about what you wish to be alerted:

GreenAbbey > Teachers > School Documents > New Alert

New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.
[View my existing alerts on this site.](#)

Alert Title
Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.

Send Alerts To
You can enter user names or e-mail addresses. Separate them with semicolons.

Change Type
Specify the type of changes that you want to be alerted to.

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

When to Send Alerts
Specify how frequently you want to be alerted.

School Documents

Users:
jill.foster

Only send me alerts when:

- All changes
- New items are added
- Existing items are modified
- Items are deleted
- Web discussion updates

Send me an alert when:

- Anything changes
- Someone else changes a document
- Someone else changes a document created by me
- Someone else changes a document last modified by me

Send e-mail immediately
 Send a daily summary

4. Click the **OK** button to save your choices.

A

Appendix B - Managing User Groups and Permissions



This section contains:

- Overview
- Giving Users Access to Sites
- Changing Group Permissions
- Creating a New Group

Overview

Work in this unit refers in the main to general SharePoint techniques without direct reference or relevance to Capita web parts. It is no more than an introduction to general SharePoint administration and schools should budget to send a key staff member onto a general two day *Microsoft SharePoint Administrator* course. Capita is one provider of this course.

- You give access to users for your site by assigning them to groups. Each group definition includes permissions which control the way the group can interact with your site and its content
- Each site has various group permissions defined by default and you can create new groups and permissions if necessary
- Much of this work will happen automatically under Active Directory routines which will create security groups for the students, parents and teachers at the school when they are selected to be given access to SLG. The routines for creating user IDs and the security groups to which they belong are discussed in *Unit 5*.

Giving Users Access to Sites

Most of this work will have happened automatically under Active Directory routines, the instructions here help you define extra groups and their permissions.

1. From your Home Page, click the **Site Actions** drop-down, then select **Site Settings** from the menu displayed.
2. Under **Users and Permissions** click the [People and groups](#) hyperlink.



User and Permissions



People and Groups link

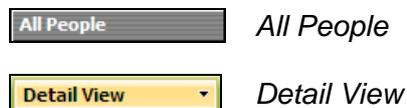
This will show you those groups which currently have any rights on the site. The groups are listed in the left-hand menu.



3. The [More...](#) link shows a much more comprehensive list of site groups. Depending on your permissions and installation the **More...** list could show groups across many **School** sites.
4. At this point you can choose one of several options. The most common will be either to allow or disallow people's access to the site, or create a new group with specific access to the site. You might also alter the default Reader permissions for some groups in certain areas.

Allow/Disallow Access to an Existing Site Group

1. Click the **All People** button. This now shows all groups and individuals who currently have any rights to see or change this site. By default this will show the **Detail View**:



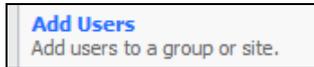
But you may prefer **List View** instead:



2. First let us add new users to the site and allow them specific permissions. Click the drop-down next to the **New** button, then click the **Add Users** button.



New button



Add Users button

This leads to the following screen:

GreenAbbey > Teachers > Site Settings > Permissions > Add Users

Add Users: Teachers

Use this page to give new permissions.

Add Users

You can enter user names, group names, or e-mail addresses. Separate them with semicolons.

[Add all authenticated users](#)

Give Permission

Choose the permissions you want these users to have. You can add users to a SharePoint group (which is already assigned to a permission level), or you can add users individually and assign them to a specific permission level.

SharePoint groups are recommended as they allow for ease of permission management across multiple sites.

Users/Groups:

Give Permission

Add users to a SharePoint group

Teachers Owners [Full Control] ▾

[View permissions this group has on sites, lists, and items...](#)

Give users permission directly

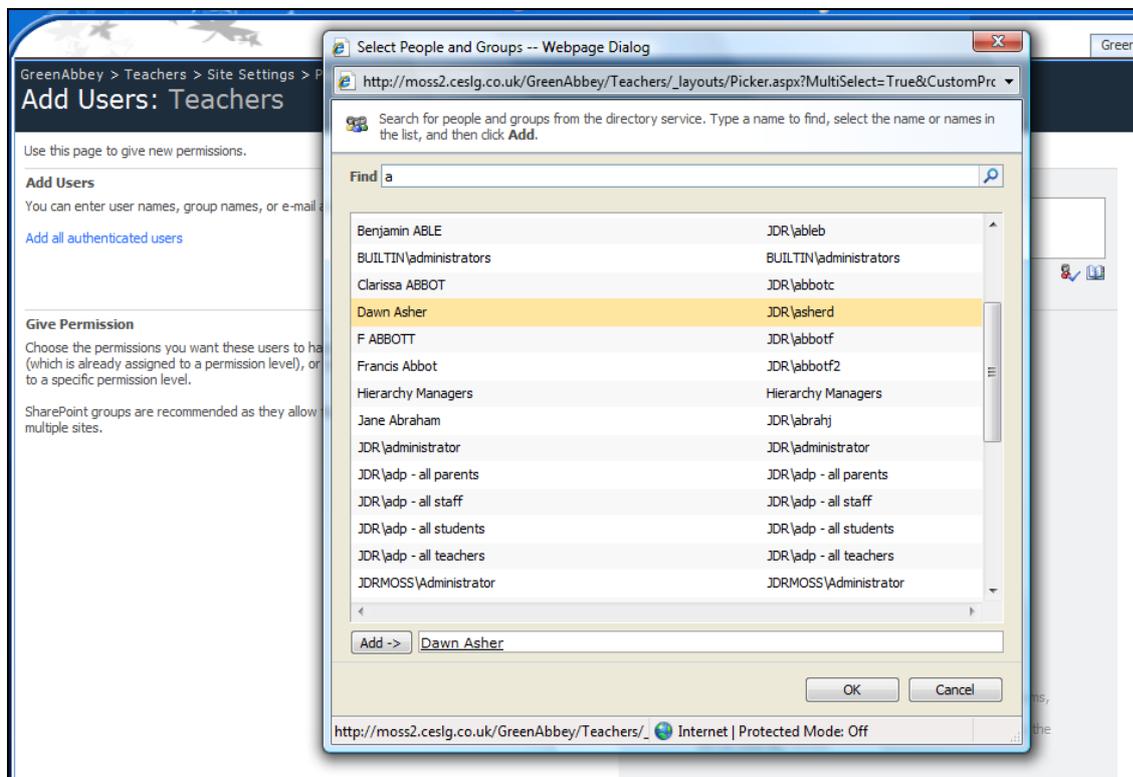
- Full Control - Has full control.
- Design - Can view, add, update, delete, approve, and customize.
- Manage Hierarchy - Can create sites and edit pages, list items, and documents.
- Approve - Can edit and approve pages, list items, and documents.
- Contribute - Can view, add, update, and delete.
- Read - Can view only.
- Restricted Read - Can view pages and documents, but cannot view historical versions or review user rights information.
- View Only - Members of this group can view pages, list items, and documents. If the document has a server-side file handler available, they can only view the document using the server-side file handler.

This allows you to choose either existing groups or individuals and give them specific permissions on the site.

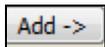
- Click the **Book** button to allow you to search for individuals or groups.



Book button



- You must type at least one letter in the **Find** box before clicking the **Search** button, then choose the individuals or groups you want to give that access to the site, by clicking the **Add** button then clicking the **OK** button.



Add button



Search button

- You can also free-type a name, but you should then check its registration by clicking the **Check Name** icon. If your typed name does not exist in the directory you will be told so:



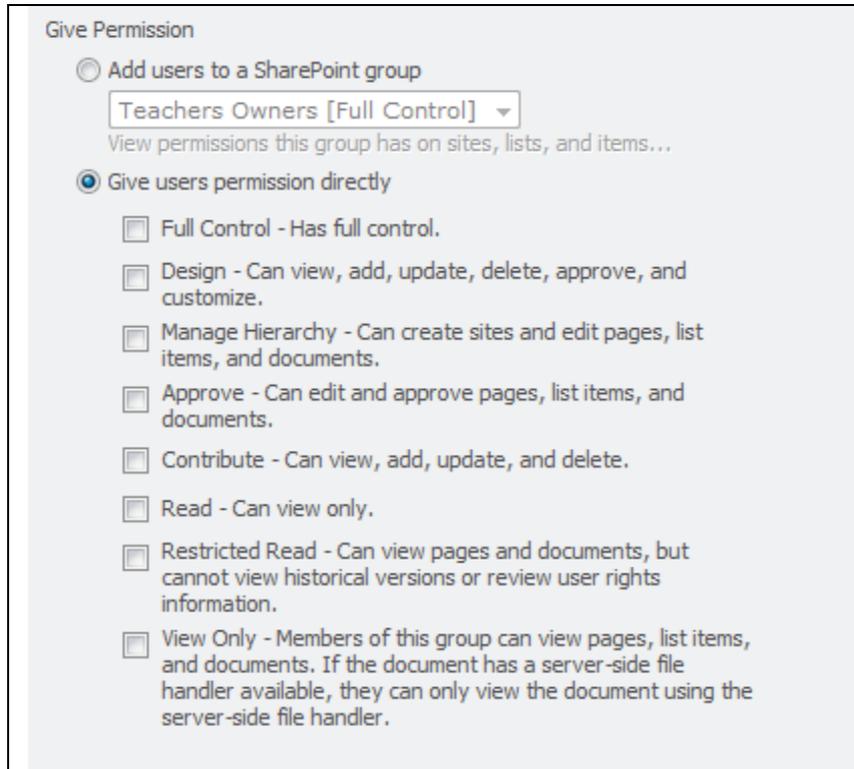
Check Name icon



Here the name Fred Bloggs has been italicised to match the warning.

No exact match was found.

Next choose the level of access you want to give to those individuals or groups using the panel shown, either by adding them to an existing group (click the radio button and set the drop-down by **Add users to a SharePoint group**, or by giving specific permissions to them.



Give Permission

Add users to a SharePoint group

Teachers Owners [Full Control] ▾

View permissions this group has on sites, lists, and items...

Give users permission directly

Full Control - Has full control.

Design - Can view, add, update, delete, approve, and customize.

Manage Hierarchy - Can create sites and edit pages, list items, and documents.

Approve - Can edit and approve pages, list items, and documents.

Contribute - Can view, add, update, and delete.

Read - Can view only.

Restricted Read - Can view pages and documents, but cannot view historical versions or review user rights information.

View Only - Members of this group can view pages, list items, and documents. If the document has a server-side file handler available, they can only view the document using the server-side file handler.

Clearly care needs to be taken here to give high enough permission for people to be able to use the site successfully, but not too much so that they can cause damage.

- Click the **OK** button when you have chosen and the names will appear in the list of names of individuals and groups who have permissions on that site.

Changing Group Permissions



NOTE: Use these procedures with care.

Groups typically have Reader Status by default – anything higher than this allows them greater or lesser control over site content – sometimes including the ability to delete content and change the look and feel of the site.

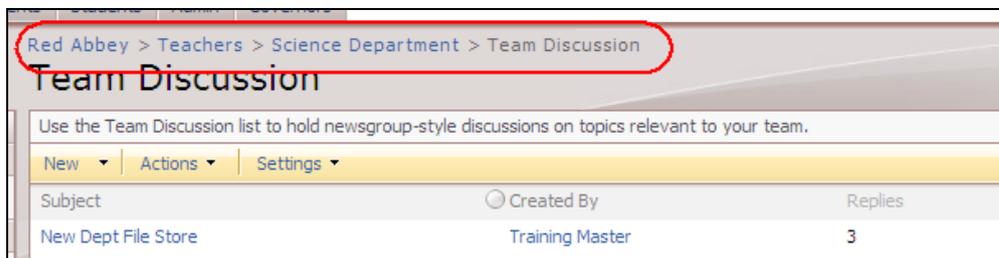
Reader permissions are perfect for most groups most of the time. However, a Reader group cannot respond to a survey or reply to a message thread in a Discussion Forum. They need Contributor Status for this.

However, if you gave the group blanket Contributor Status they would also be able to add, edit and delete items from notice boards and links sections.

There is a way to give a selected group Contributor permissions in exactly and only the areas you want – you promote the group in the selected area(s) only and they have their default Reader Status everywhere else. You are likely to need this for two main areas – **Discussion Forums** and **Surveys**.

Permissions in a Discussion Forum

1. Make sure you are at the **Display Page** for exactly the right Discussion board, e.g. select **Teachers | Science Department | Team Discussion**.



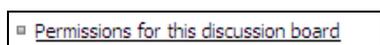
2. Click the following buttons in sequence:



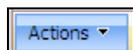
Settings button



Discussion Board Settings



Permissions for this Discussion Board

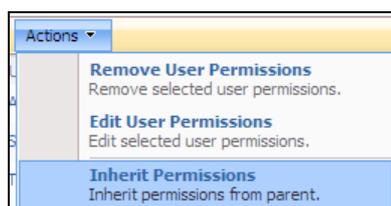


Actions button



Edit Permissions

3. If you see a different final **Actions** choice (**Inherit Permissions**) it means that step 4 has already been done and you can skip to step 5:



4. Effectively this creates unique permissions for this area and so you are warned that this will happen, click the **OK** button.



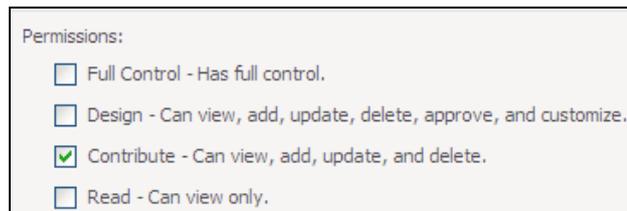
You next get active control over the groups which have access to this area:

Currently Teachers Visitors have Read Status – you want this upgraded to Contribute Status to allow them to join in a Discussion thread.

5. Select the **Teachers Visitors** check box and click the **Actions** drop-down then select the **Edit User Permissions** option.



6. Deselect the **Read - Can view only** check box and select the **Contribute – Can view, add, update, and delete** check box.

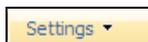


7. Click the **OK** button.

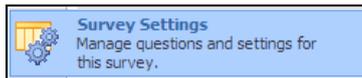
This group now has Contribute permissions, but only for this isolated discussion area. They can join in a discussion, they can edit and delete their own contributions, but they can do nothing else.

Permissions in a Survey

1. Make sure you are at the **Display Page** for exactly the right Survey board, e.g. select **Teachers | Science Department | LP Survey**.
2. Click the following buttons in sequence:



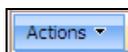
Settings button



Survey Settings link



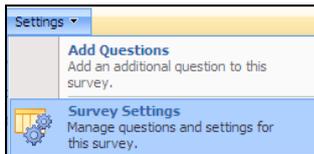
Permissions for this survey link



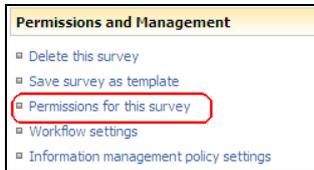
Actions button



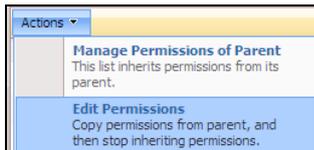
Edit Permissions link



Add Questions link



Permissions for this survey link



Manage permissions of Parent link

3. If you see a different final **Actions** choice (**Inherit Permissions**) it means that step 4 has already been done and you can skip to step 5:



Inherit Permissions link



Remove User Permissions and Edit User Permissions links

4. Effectively this creates unique permissions for this area and so you are warned that this will happen, click the **OK** button.



You next get active control over the groups which have access to this area:

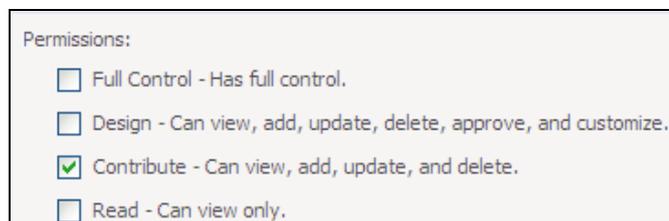
	New	Actions			
<input type="checkbox"/>		Users/Groups	Type	User Name	Permissions
<input type="checkbox"/>		Anne Little	User	TRNG\alitt	Full Control
<input type="checkbox"/>		System Account	User	SHAREPOINT\system	Full Control
<input type="checkbox"/>		Teachers Owners	SharePoint Group	Teachers Owners	Full Control
<input type="checkbox"/>		Teachers Visitors	SharePoint Group	Teachers Visitors	Read

Currently Teachers Visitors have Read Status – you want this upgraded to Contribute Status to allow them to join in a Discussion thread.

- Select the **Teachers Visitors** check box and click the **Actions** drop-down and select **Edit User Permissions** from the menu displayed.

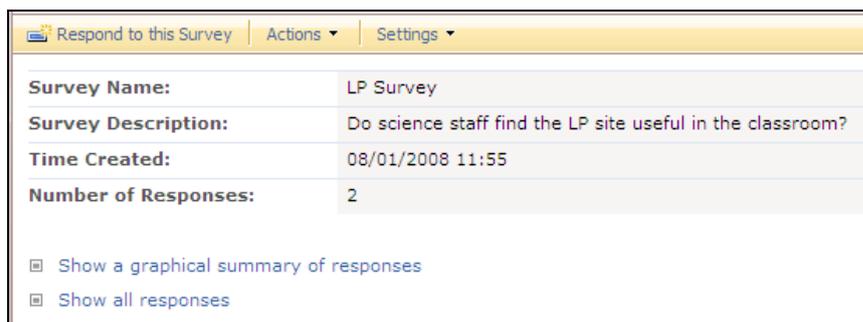


- Deselect the **Read – Can view only** check box and select the **Contribute – Can view, add, update, and delete** check box.



- Click the **OK** button.

This group now has Contribute permissions, but only for this isolated **Survey** area. They can now respond to this survey, they can show a graphical summary of responses and show all responses. You may wish also to change the Advanced permissions to the survey so that they can only see their own responses.



Creating a New Group

Although there are already quite a few SharePoint groups which have been defined when the school's system was set up, it could be that you want to create a new SharePoint group so as to be able to choose it in the future. One typical use of this facility is the creation of a group allowed to add, edit and delete things from lists such as notice boards, forums etc. or you may want Governors group, for example.

The process has two steps, create a new group and add members to the group.

- From your Home Page click the **Site Actions** drop-down, then select **Site Settings** from the menu displayed.

2. Under **Users and Permissions** click the [People and Groups](#) hyperlink.
3. Click the **New** button followed by **New Group**. You then reach a screen which allows you to create the SharePoint group of your own:

Name:

About Me:

Can add, edit and delete items for Announcements, Forums, etc

Group owner:

You must give the group a unique name on the site; you should add a brief description; you would normally be the Group Owner, allowing you to alter permissions later for example.

Lower down the **Set-up** screen you can set certain parameters and email new members.

Who can view the membership of the group?
 Group Members Everyone

Who can edit the membership of the group?
 Group Owner Group Members

Allow requests to join/leave this group?
 Yes No

Auto-accept requests?
 Yes No

Send membership requests to the following e-mail address:

You should think carefully about the permission level you want group members to have:

Choose the permission level group members get on this site: <http://sales.capita>

Full Control - Has full control.

Design - Can view, add, update, delete, approve, and customize.

Contribute - Can view, add, update, and delete.

Read - Can view only.

4. Click the **Create** button to save the new group.

You can then add new members as described in **Allow/Disallow Access** to an existing site below.

A

Appendix C - Wikis and Blogs



This section contains:

- Introduction
- Working with Wikipedia (WIKIS)
- Working with Web Log (BLOGS)

Introduction

Work in this unit refers in the main to general SharePoint techniques without direct reference or relevance to Capita web parts. It is no more than an introduction to general SharePoint administration and schools should budget to send a key staff member onto a general two day *Microsoft SharePoint Administrator* course. Capita is one provider of this course.

Wikis and Blogs are increasingly common on the internet.

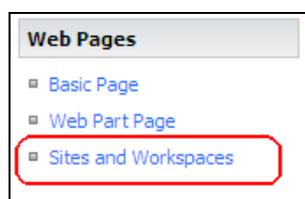
A Wiki is a web page to which anyone can contribute – a more detailed explanation is given by SharePoint when you create a new **Wiki** page. We will explain how to create the **Wiki** page and give permission to visitors to add their own comments, you should also carefully read the instructions from the link [How To Use This Wiki Site](#) which will appear in the Quick Launch left margin.

A Blog (short for Web Log) is a private on-line diary or information space controlled by one person and read by many. In this case the Blog would be set up and controlled by a school administrator while others – parents, students or teachers, depending on the Blog location – would be able to add comments - these could be held in an **Approval** area until cleared for publication by an administrator.

Creating WIKIS

The original **Wiki** page can only be created by an administrator. After this, with the correct permissions, any user will be able to add new content or new pages to the site.

1. You need to be at the correct **Start** page, e.g. **Parents** Home Page from which you click the **Site Actions** button, then click the **Create** button.
2. From the **Web Pages** section, click the [Sites and Workspaces](#) hyperlink.



3. You then have some basic choices about **Title** and **Description**:

A screenshot of a web form with two input fields. The first field is labeled 'Title:' and contains the text 'My Wiki'. The second field is labeled 'Description:' and is empty, with a vertical scrollbar on the right side.

4. Type a unique URL (web address):

A screenshot of a web form with a single input field. The label 'URL name:' is positioned above the field. The field contains the text 'http://sales.capita-cso.co.uk/GreenAbbey/Students/my_wiki'.

5. Select the correct site type:

A screenshot of a 'Select a template:' dropdown menu. The menu is open, showing a list of options: 'Team Site', 'Blank Site', 'Document Workspace', 'Wiki Site', and 'Blog'. The 'Wiki Site' option is highlighted with a blue background. Above the list are three tabs: 'Collaboration', 'Meetings', and 'Enterprise'.

6. You also set permissions inheritance (it is probably best to make this unique so you have independent control) and decide if you want to see a link to the Wiki in the QLA (probably **Yes**) and in the tabs across the top of every screen.

A screenshot of a 'User Permissions' section in a web form. The section has a light green background and contains three groups of radio button options. The first group is 'User Permissions:' with 'Use same permissions as parent site' and 'Use unique permissions' (selected). The second group is 'Display this site on the Quick Launch of the parent site?' with 'Yes' (selected) and 'No'. The third group is 'Display this site on the top link bar of the parent site?' with 'Yes' (selected) and 'No'. The fourth group is 'Use the top link bar from the parent site?' with 'Yes' (selected) and 'No'.

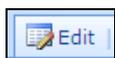
7. Finally, click the **Create** button to save the page. You will be taken to the new page where you should carefully read the information linked from **How To Use This Wiki Site**.

Back on the main **School, Parent, Teacher** and **Student** Home Page you should see a new link in the **Quick Launch** or **Tabs** set (you may have to refresh the page using the **F5** function key).



Basic Setup of WIKIS

Your initial page will contain default text – you can go into Edit mode and change any and all of it.



Edit Mode button

This way you can introduce yourself, or explain what the focus of the page is etc.

You can create new **Wiki** pages by typing a default title inside double square brackets, e.g. [\[\[My Wiki Page 1\]\]](#) this turns the words into a hyperlink and if you click the link you can edit the new page exactly as before.

If you do not go straight to the new page its hyperlink is underlined in dots indicating to a visitor that there is a fresh page for them to add to. In this graphic My Wiki Page 1 has been visited, while My Wiki Page 2 has been created but has no text yet.



Visitors will only be able to add content if you give them the correct permissions.

WIKIS Permissions

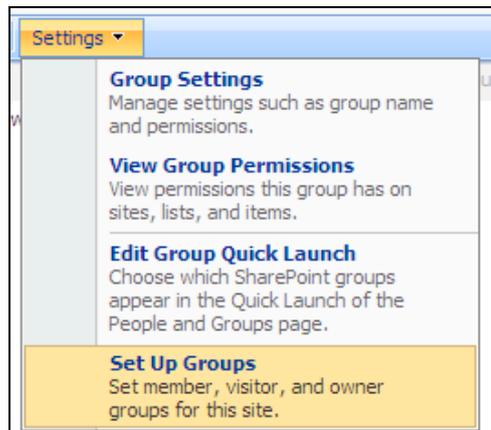
Most Wikis will be for the use of all site members. The group creation routines for your school automatically create groups called **All - My School Parents**, **All - My School Teachers**, **All - My School Students** and **All - My School**. You can use this feature to link everyone in the relevant group to the correct Wiki and give them the rights to add new content.

You can of course have very restricted contributory rights if you wish by selecting individual users rather than entire groups.

Make sure you are at the Home Page for the Wiki site.

1. Click the **Site Actions** button, then click the [Site Settings](#) hyperlink and select **People and Groups**.

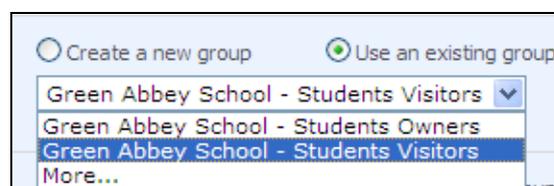
- Click the **Settings** drop-down and select **Set Up Groups** from the displayed menu.



The next page offers you three permissions levels for groups using the site:



For each category you can create a new group (and add members to it) or more likely, choose an existing group. To start with each list is short:



3. Clicking **More...** expands the list:

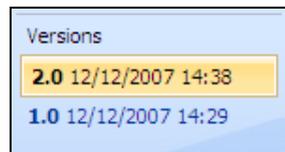


4. From this list you can select an appropriate group, e.g. **All – The Grange Students** if the Wiki is on the **Student** area.
5. To allow users to contribute to a Wiki you should select their group in the **Members of this site** section.
6. Finally click the **OK** button to save your choices.

Version Control of WIKIS

The system automatically stores copies of earlier versions of your Wiki site.

1. As site manager you can delete inappropriate content – click the **Edit** button to go into **Edit** mode and alter the text or you can delete the item completely.
2. You can restore the site to an earlier version – click the **History** button and select the following from the list in the left-hand margin:

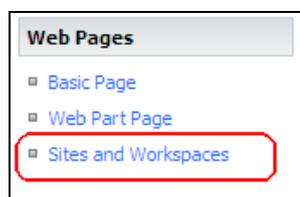


Creating BLOGS

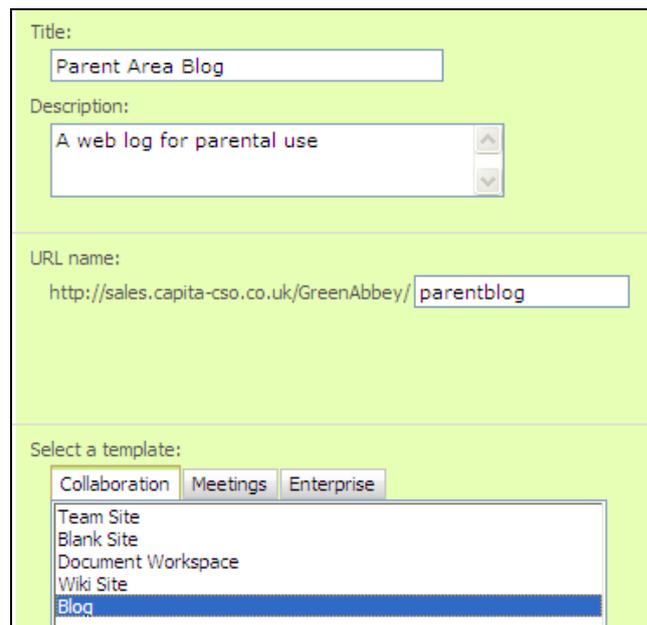
The original **Blog** page can only be created by an administrator. After this, with the correct permissions, any user will be able to add new content or new pages to the site. Comments will be held in a non-visible store for approval before final publication.

You need to be at the correct start page, e.g. Parents Home Page, from which you click the **Site Actions** button, then click the **Create** button.

1. Then, from the **Web Pages** section click the [Sites and Workspaces](#) hyperlink.



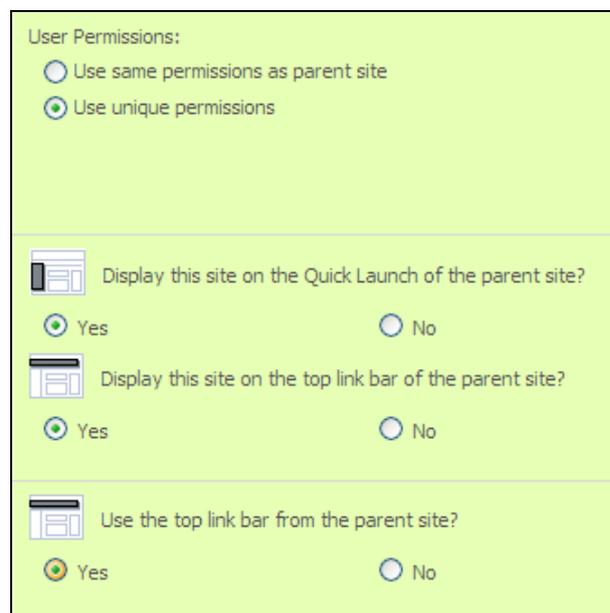
2. Type in basic details:



The screenshot shows a configuration form for a 'Parent Area Blog'. The form is divided into several sections:

- Title:** A text input field containing 'Parent Area Blog'.
- Description:** A text area containing 'A web log for parental use' with up and down arrow icons on the right.
- URL name:** A text input field containing 'parentblog' next to the URL 'http://sales.capita-cso.co.uk/GreenAbbey/'.
- Select a template:** A dropdown menu with tabs for 'Collaboration', 'Meetings', and 'Enterprise'. The dropdown is open, showing options: 'Team Site', 'Blank Site', 'Document Workspace', 'Wiki Site', and 'Blog' (which is highlighted).

3. You should set the permissions to be unique, then you have control over the way the Blog works independent of the way its **Parent** site is set up. Set the other radio buttons as you wish.



The screenshot shows the 'User Permissions' configuration form. It includes the following options:

- User Permissions:** Two radio buttons: 'Use same permissions as parent site' (unselected) and 'Use unique permissions' (selected).
- Display this site on the Quick Launch of the parent site?:** Two radio buttons: 'Yes' (selected) and 'No' (unselected).
- Display this site on the top link bar of the parent site?:** Two radio buttons: 'Yes' (selected) and 'No' (unselected).
- Use the top link bar from the parent site?:** Two radio buttons: 'Yes' (selected) and 'No' (unselected).

4. Click the **Create** button to complete the job.

After a little processing your new **Blog** page is created and you are taken to the next step – setting up groups and permissions.

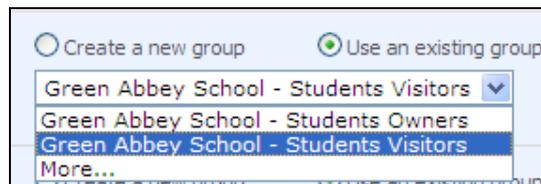
BLOG Permissions

The next page offers you three permissions levels for groups using the site:

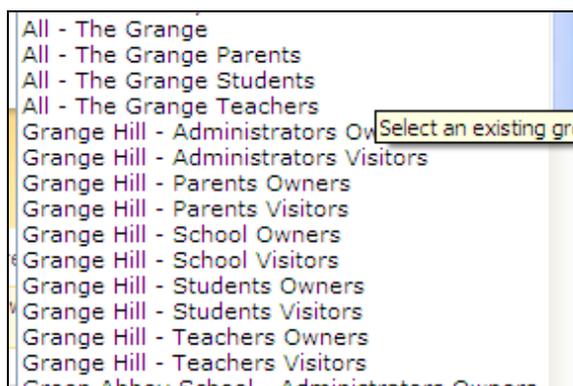


You need to carefully identify the members for the Blog – those who can contribute comments.

1. For each category you can create a new group (and add members to it) or choose an existing group. To start with each list is short:

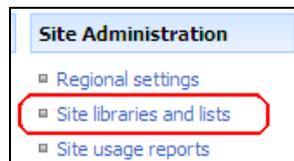


2. Clicking **More...** expands the list:

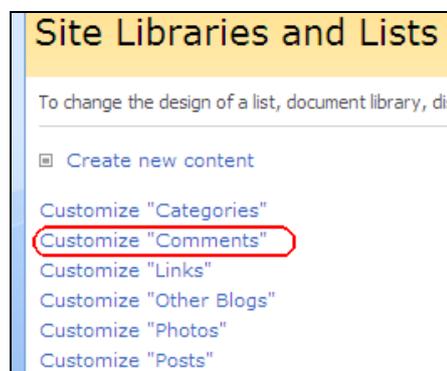


3. From this list you can select an appropriate group, e.g. **All – The Grange Parents** if the Blog is on the **Parent** area.
4. To allow users to contribute to a Blog you should select their group in the members of this **Site** section.
5. Finally click the **OK** button to save your choices.

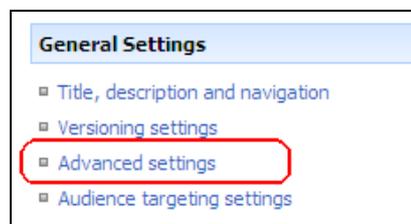
6. You have two more levels of control over how the Blog can be used – one limiting a user's ability to edit content, and one setting up the requirement for your approval before content is publically visible.
7. To limit **Edit** access, click the **Site Actions** drop-down and select **Site Settings** from the menu displayed. Click the [Site Libraries and Lists](#) hyperlink from the **Site Administration** section.



8. Click the [Customize "Comments"](#) hyperlink.



9. Select **Advanced Settings** from the **General Settings** section.



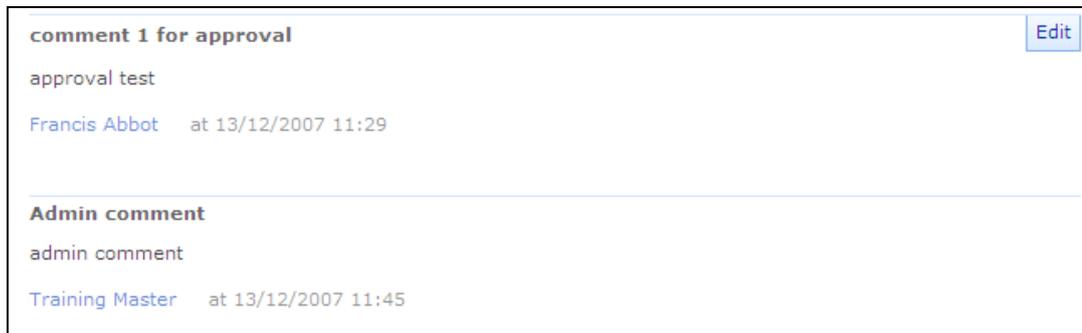
You would probably want to restrict edit access only to a user's own posts.

 A screenshot of a settings form. The form has a light blue background and contains the following sections:

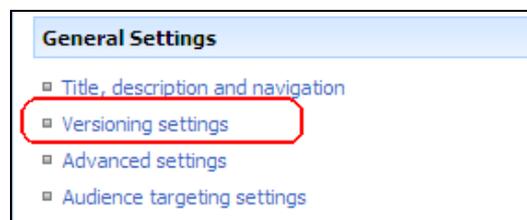
- Read access:** Specify which items users can read. Options: All items, Only their own.
- Edit access:** Specify which items users can edit. Options: All items, Only their own, None.
- Attachments to list items are:** Options: Enabled, Disabled.
- Allow items from this list to appear in search results?** Options: Yes, No.

10. Click the **OK** button to save your choices.

The user then sees [Edit](#) links only for their own comments:



11. To set up content approval, select **Versioning settings** from the **General Settings** section.

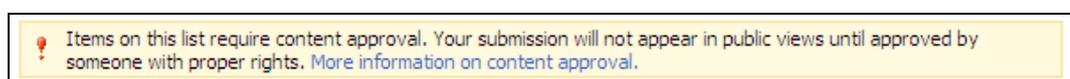


12. Select the **Yes** radio button in the **Content Approval** section:

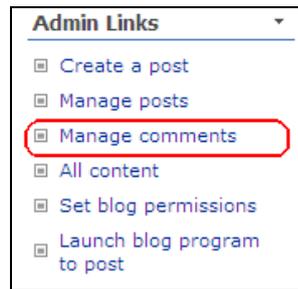
The screenshot shows the "Content Approval" settings form. The first question is "Require content approval for submitted items?" with "Yes" selected (radio button with a green dot) and "No" unselected. The second question is "Create a version each time you edit an item in this list?" with "Yes" unselected and "No" selected. The third section is "Optionally limit the number of versions to retain:" with two checkboxes, both unselected, and empty input fields. The fourth question is "Who should see draft items in this list?" with "Any user who can read items" unselected, "Only users who can edit items" unselected, and "Only users who can approve items (and the author of the item)" selected.

13. Click the **OK** button to save your choices.

With approval in place the user sees this message when they go to comment:



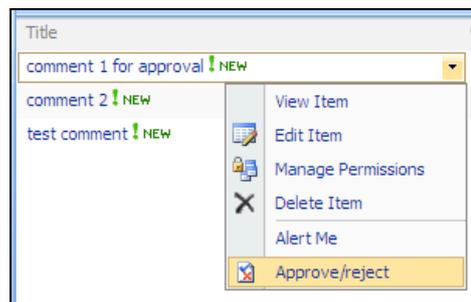
14. Their comment is held in an **Administrative** area. When the administrator goes here and selects **Manage comments** in the **Admin Links** section:



The user sees:

Title	Created By	Post Title	Edit	Approval Status
comment 1 for approval !NEW	Francis Abbot	Welcome to your Blog!		Pending
comment 2 !NEW	Francis Abbot	Welcome to your Blog!		Approved
test comment !NEW	Francis Abbot	Welcome to your Blog!		Approved

15. Clicking the drop-down for the comment title shows:



16. From which the administrator can choose to approve or reject the comment.

The final step occurs here:

Approved. This item will become visible to all users.

Rejected. This item will be returned to its creator and not appear in public views.

Pending. This item will remain visible to its creator and all users with the Manage Lists permission.

17. Click the **OK** button to save your choices.

Using Blogs

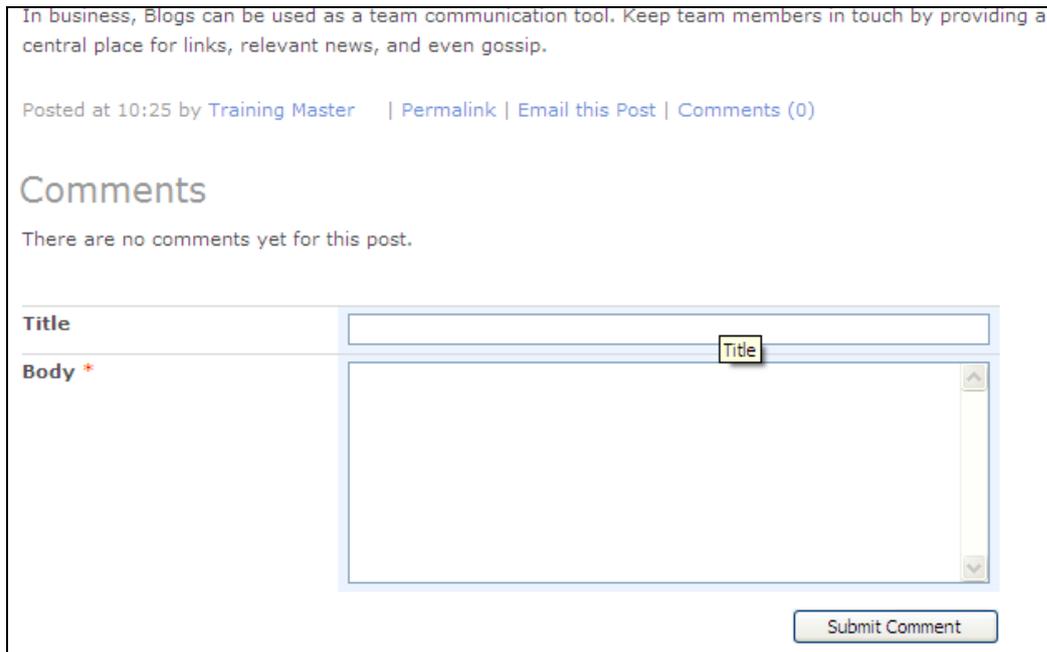
The administrator sets up the initial Blog, which will have three default areas to start with – Category 1, Category 2 and Category 3. An administrator can change these labels, delete a category and establish a new one. Think of them like threads in a Forum.

Categories
<ul style="list-style-type: none"> ▪ Category 1 ▪ Category 2 ▪ Category 3
Other Blogs
There are no items in this list.
Links
<ul style="list-style-type: none"> ▪ Photos ▪ Archive ▪ Archive (Calendar)

The default structure also provides a store place for photos and two forms of automatic change tracking, one of which works from a **Diary View**:

December 2007					Expand
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	31
3	4	5	6	7	8
10	11	12	13	14	15
			10:25 Welcome to your Blog!		
17	18	19	20	21	22

After this, selected groups can contribute comments by clicking the [Comments](#) hyperlink.



In business, Blogs can be used as a team communication tool. Keep team members in touch by providing a central place for links, relevant news, and even gossip.

Posted at 10:25 by [Training Master](#) | [Permalink](#) | [Email this Post](#) | [Comments \(0\)](#)

Comments

There are no comments yet for this post.

Title

Body *

This opens a dialogue window where comments can be typed and submitted. Comments are usually held in a hidden area until the administrator approves them for publication.



For more information please see Using BLOGS.

A

Appendix D - Audiences



This section contains:

- Introduction
- Admin Set up
- Applying Audience Filters

Introduction

Work in this unit refers in the main to general SharePoint techniques without direct reference or relevance to Capita web parts. It is no more than an introduction to general SharePoint administration and schools should budget to send a key staff member onto a general two day Microsoft SharePoint Administrator course. Capita is one provider of this course.

- The Audiences feature allows administrators to target materials to selected groups and individuals
- After some administrative set-up, materials such as Announcements, Documents etc. can be tagged with the title of a particular audience after which only the selected people will see the resource.

Admin Set-up

Audiences have to be set up and compiled (populated with members) on the SLG2 server – this is part of the general SharePoint set-up and will have been completed by the Capita Hosted technical team.

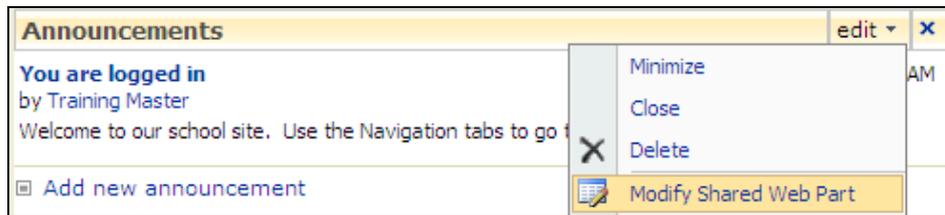
Applying Audience Filters

Audience filters can be applied to any resource within SharePoint. So, for example, you could set an **Audience** filter on an Announcement Board and only those in the permitted group would be able to see the Announcements on a particular page.

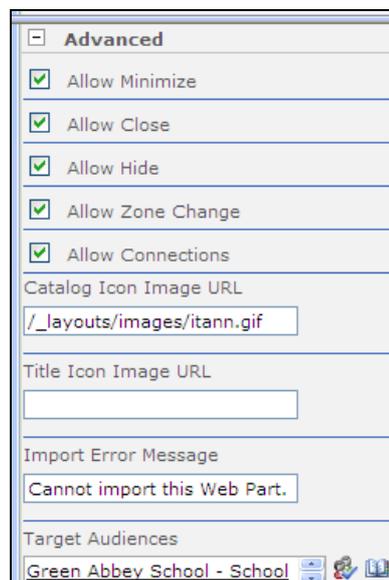
In this example an Announcement web part is to be targeted – the principle is the same for other resources.

1. On the page holding the Announcements web part, click the **Site Actions** drop-down and select **Edit Page** from the menu displayed:

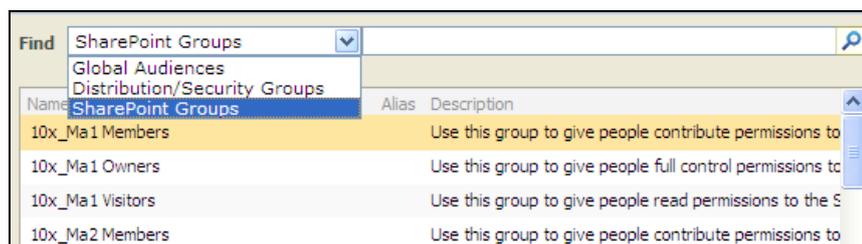
- Click the **Edit** drop-down and select **Modify Shared web part** from the menu displayed:



- Open the **Advanced** section of the web parts **Properties** and scroll down to **Target Audiences**:



- Click the **Book** icon to search for the **Audience Group Name**, after selecting **Global Audiences**, **Distribution/Security Groups** or **SharePoint** filters first:



- Double-click a group name to add it and click the **OK** button to finish the process.



- Finally click the **OK** button to finish the web part editing and the **Audience** filter should be in place.

7. You can even apply an **Audience** filter to one Announcement in a set by using the same techniques from the Target Audiences control for each new message:

