**Quick Reference Sheet** 

# SIMS Using the School Diary

The School Diary can be used to record any school events that occur during the course of an academic year, e.g. school trips, training days, staff meetings, parent's evenings, etc. The School Diary also has links with Attendance, so school closures, half-term dates, etc, are reflected in the attendance records. A school closure (or partial school closure (in England only)) can be created via **Focus** | **Attendance** (or **Lesson Monitor**) | **Exceptional Circumstances**.

#### Changing the School Diary View

Select **Focus** | **School** | **School Diary** to display the **School Diary** page. By default, the details for the current academic year are displayed. It is possible to change the **School Diary** view by clicking the apropriate button on the toolbar, i.e. **Day**, **Week** or **Month**.



It is possible to view events that accurred in proviews to

It is possible to view events that occurred in previous terms and years. 1. From the **Academic Year** navigation tree, select the relevant year

- then click the + button to expand the details.
- 2. Double-click the term that contains the required dates.
- Scroll down the page until you reach the required date and details of the event.
   To return to the current year, select it from the Academic Year
- navigation tree. Click the + button to expand the details then double-click the current term.

#### Adding Events to the School Diary

Providing you have appropriate Permissions, events can be added to the School Diary that are visible to all users. Events can be added to your own personal diary then marked as **Private** so that they are <u>not</u> visible to others.

Select **Focus** | **School** | **School Diary** to display the **School Diary** page. A new school event can be created in any of the following ways:

- Click the **Action** button to display the **School Event** dialog.
- Click the Action button drop-down arrow then select Create New Event | User Defined Event from the drop-down menu.
- Double-click any date in the **School Diary**.
- Right-click anywhere on the School Diary then select New School Event from the pop-up menu.
- 1. Enter a **Description** for the event. This description will be displayed in the School Diary.
- 2. Select the Category from the drop-down list, e.g. Field Trip.

Additional categories can be created (providing you have appropriate Permissions) by clicking the **Categories** button.

- 3. Select the **All day event** check box, if applicable.
- 4. Alternatively, specify the **Start time** details by clicking the **Calendar** butto

School Ever	nt	? 🔀
Description	Year 3 Biology Field Trip to Butterfly Park.	× >
Category	Field Trip	Categories
Start time	07/03/2012 🚺 09:30	🗙 All day event 🔲
End time	07/03/2012 🚺 15:30	Recurrence
Private		
		Ok Cancel

clicking the **Calendar** button then selecting a date. Select the start time from the drop-down list.

- The end date defaults to the same date as the start date. If required, edit the date by clicking the **Calendar** button. Select the end time from the drop-down list.
- 6. Select the **Private** check box, if required, to ensure that the event is invisible to others, e.g. a personal hospital appointment, etc.

**Quick Reference Sheet** 

### SIMS **Using the School Diary**

#### Adding Recurring Events to the School Diary

Some School Diary events may occur on a regular basis, e.g. Staff meetings and Governor's meetings, etc. Defining an event as recurring prevents the need to re-enter the event details.

NOTE: Once added, recurring events can only be deleted on an individual basis.

- 1. Select Focus | School | School Diary to display the School Diary page.
- 2. Click the Action button down-arrow then select Create New Event | User Defined Event to
- display the School Event dialog.
- 3. Enter a **Description** for the event then select the required Category from the drop-down list. Additional categories can be created (providing you have appropriate Permissions) by clicking the Categories button.

Description	Staff Meeting			1
Category	Generic event		~	Categories
Start time	07/03/2012	15:30	l v	All day event
End time	07/03/2012	17:00	· •	Recurrence
Private				
			Ok	Cancel

- 4. Click the Recurrence button to display the Event Recurrence dialog.
- 5. If the event is planned for the whole day, select the All day event check box located at the top left-hand side of the dialog.
- 6. Alternatively, specify the Event time by selecting the Start time and End time from the respective drop-down lists.

Event Recurrence			? 🛽
📃 All day event			
Start: 15:30 V	End: 17:00 🗸	Event Duration Days: 0 🗸	Hours: 1 V Minutes: 30 V
Pattern Daily Weekly Monthly	Recur every 1 Monday Friday	week(s) on: Tuesday Saturday	☐ Wednesday ☐ Thursday ☐ Sunday
Range of recurrence Start: 07/03/2012 V Skip holiday		<ul> <li>End by:</li> <li>End after:</li> </ul>	07/06/2012
			OK Cancel

The Event Duration

is be populated automatically.

Define the event recurrence Pattern by selecting one of the following radio buttons.

#### Adding a Staff Training Day

Staff training days are usually added when defining the academic year. However, additional staff training days can be added as follows:

- 1. Select Focus | School | School Diary to display the School Diary page.
- 2. Click the Action button down-arrow then select Create a New Event | Teacher Training Day to display the Staff Training dialog.
- 3. Enter a **Description**, e.g. INSET day.
- 4. Select the relevant Category from the drop-down list. Additional categories

can be created (providing you have appropriate Permissions) by clicking the Categories button.

Staff Traini	ng ? 🛛
Description	
Category	Categories
Session	01/03/2012
	AM Session Recurrence
	V PM Session
	Ok Cancel

- Enter the date of the staff training day Session or click the Calendar 5. button then select the required date.
- Select the AM or PM check box, or both, as applicable. 6.
- 7. Click the **OK** button to save the details.

- Daily select either the appropriate Every radio button and enter the number
- of days between the event being repeated, e.g. every 1 day

to indicate how

boxes to denote

of days between	Dailu	O Every 1	day(s)			
the event being	O Weekly	<ul> <li>Every weekday</li> </ul>				
repeated,	O Monthly	Monday	🖌 Tuesday	📃 Wednesday	🔲 Thursday	
e.g. every 1 day, or		Friday	Saturday	🔄 Sunday		
select the <b>Every</b>						Ì

Weekday radio button to specify the days when the event will occur.

Select the appropriate check boxes to denote the days when the event will take place.

Weekly - enter the number of weeks in the Recur every field

frequently the	Pattern	Recur every 1	week(s) on:		
event will recur.	Weekly	Monday	Tuesday	✓ Wednesday	Thursday
Select the	O Monthly	Friday	Saturday	Sunday	_
appropriate check					

month(s)

the days when the event will take place.

Monthly - enter the relevant date of the month in the Day field and the number of months between

months between	🔿 Daily	🔿 Day	1	of every	1	mo	nth(s)
the event being	O Weekly	<ul> <li>The</li> </ul>	First	✓ Mo	nday	~	of eve
repeated in the <b>of</b>	Monthly						
every field,							
e.g. 1st Monday of	·					_	
every month.							

Alternatively, select the The radio button then select the appropriate values from the associated drop-down lists, e.g. the First Monday of every 1 month.

7. Specify the **Range of recurrence** by entering the **Start** and **End by** dates.

Alternatively, select the End after radio button then enter a number in the **occurrences** field (defaults to 10 occurences).

- If the event only occurs during school time, select the Skip holiday 8. check box to suspend the event during school breaks.
- 9. Click the OK button on the Event Recurrence dialog to save the recurring event.

#### Adding a Public Holiday

Adding Public Holidays affects attendance records, i.e. attendance at school is not required.

- Select Focus | School | School Diary to display the School Diary 1. page.
- 2. Click the Action button down-arrow then select New Public Holiday from the drop-down menu to display the Public Holiday dialog.
- 3. Enter a **Description** for the public holiday, e.g. Boxing Day.
- 4. Select the relevant Category from the drop-down list.
- 5. Specify the Start Time of the public holiday by clicking the Calendar button then selecting the date.

## CAPITA

Capita SIMS, Franklin Court, Priory Business Park, Cardington, Bedfordshire MK44 3JZ Tel: 01234 838080 Fax: 01234 832036 Email: sales@capita.co.uk Web: www.capita-cs.co.uk

© Capita Business Services Ltd 2012. All rights reserved. No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated or transmitted without the express written consent of the publisher.

This guide is based on the version of the software (7.144) in use at the time of publication.