End of Year 2023 02

Prepare for the New Year – Staff Information

For School Administrative Staff

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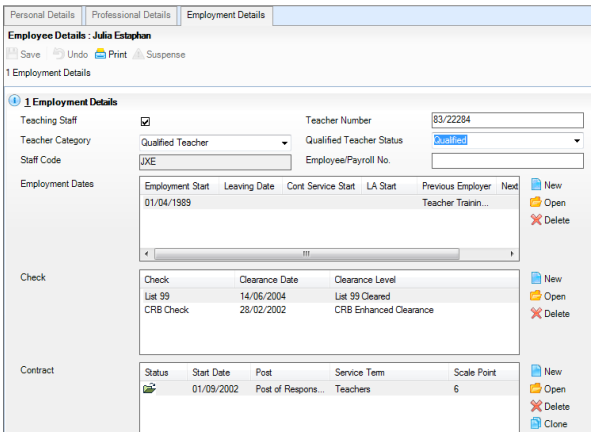
Staff Leavers

1. Follow route **Focus / Person / Staff** or click the **Staff** icon at the top of the screen.

2. Browse to the member of staff who is due to leave.

3. Click on the **Employment Details** tab.



4. Enter a **Date of Leaving** (which could be a date in the future) in the **Employment Dates** panel.

   If the member of teaching staff is leaving at the end of term, the leaving date should be recorded as **31st August**.

   As with students, staff will continue to appear on lists until the day after their date of leaving.

Note: If you are recording contractual information in Personnel, then you will be warned that the staff member has un-terminated contracts - all of these will be closed automatically and given the same end date as the date of leaving.

Saying **Yes** to this message will enter the date of leaving in the contract area.

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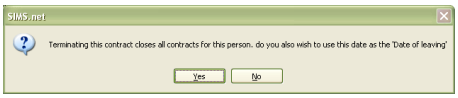
5. Open the current contract for the member of staff and enter

6. the appropriate **Destination** from the drop-down list.

7. Enter the leaving date in the **Contract End Date** and the **Role** end date.

8. Click **Save**.

   The following message will appear.



9. Say **Yes** to the message.

10. Click **Save**.

Removing SIMS Access

Once a member of staff has left the school any access to SIMS will need to be removed, this is done by marking their account as Inactive and removing any Group Permission Memberships they have. By performing both of these tasks any access to SIMS will be revoked.

Making a User Inactive

1. Follow route **Focus / System Manager / Manage Users**.

2. Search for and highlight the appropriate user to be marked inactive.

3. Go to the **Basic Details** panel.

4. Deselect the **Active** check box.

5. Click **Save**.

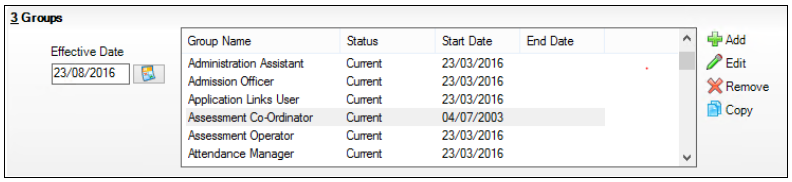
Removing Group Permission Memberships

1. Follow route **Focus / System Manager / Manage Users**.

2. Search for and open the user whom you wish to remove permissions from.

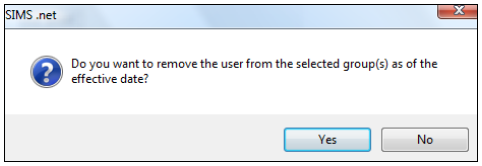
3. Go to the **Groups** panel.

4. Highlight the group that you wish to remove.



5. Click the **Remove** button to the right of the right of the panel

6. Click **Yes** on the confirmation panel.



7. Click **Save**.

   Note that the group membership that you have removed is still listed in the panel, but it will now display an **End Date**.

Adding a New Member of Staff

1. Follow route **Focus / Person / Staff** or click the **Staff** icon at the top of the screen.

Important Note: Before you enter in a member of staff it is advised that you search the database using the browser panel, to ensure their details have not already been entered. To do this you will need to use the **All Status** when using the browse function. There should be no duplicate records in the Personnel area as records can be re-issued using the Employment Dates area. Duplicate records also cause issues in the System Manager area when assigning new staff access to SIMS.

Note: Remember to change the **Status** to **All** when searching.

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2. Click **New**. This will display the **Basic Details** page.

3. Enter the employee's **Surname, Forename, Gender** and **Date of Birth**.

4. Click **Continue**.

Note: Please note that we advise you to click the **Save** button Save at the top of the screen after you have **completed each individual panel** of the **Staff Details** screen.

In the **Staff Details** screen you must:

- Enter all of the new staff details as far as possible.
- **Gender**, **Date of Birth** and **National Insurance Number** fields are mandatory.

- Ensure you enter the member of staff's initials in the **Staff Code** field to assign initials to the staff member. This must be a unique code and must match the staff code that is used in Nova-T6 for teachers (Secondaries only).

- Complete the **Employment Start Date** to ensure the member of staff's details pull through into other areas of the system.

- If the new person is a teaching member of staff, remember to tick the **Teaching Staff box** and enter in their **Teacher Number**.

- Staff will not appear in the current staff browse if their date of appointment is in the future: Change the view in the Staff browse to **All** to view staff who are joining later (or who have left).

Assigning SIMS Access for a New User

This process will assign any new members of staff a new SIMS Login. It is important to remember that they will also need to be assigned group permissions as well.

1. Follow route **Focus / System Manager / Manager Users**.

2. Click **Search** and check the list to ensure the user does not already have an account.

Note: It is important to search to ensure the user does not already appear in the SIMS system. This not only has a impact in SIMS Personnel but also on the assignment of school staff email accounts.

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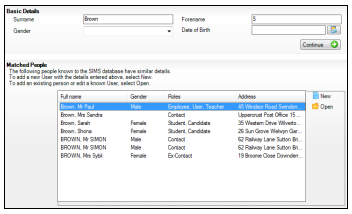
3. Click **New**.

4. Enter the details of the individual.

5. Click **Continue** to display a "Matched People" list.



6. Highlight the relevant person.

7. Click **Open**.

   If the relevant person does not appear and you are certain they do not appear in SIMS with a different name then click **New**.

8. Enter any details as necessary.

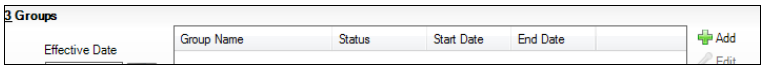
Adding a User to a Permission Group

A Group controls what SIMS permissions a User has access to and what data within it they can see or amend. For example, a user with Class Teacher access can take a register and see attendance data where an Attendance Manager can use and amend all areas of attendance.

When defining permissions, you should consider the intended use and also the role of the user.

This assumes that the **Focus / System Manager / Manager Users** screen is still open.

1. Click the **Add** button to the right of the **Groups** panel.



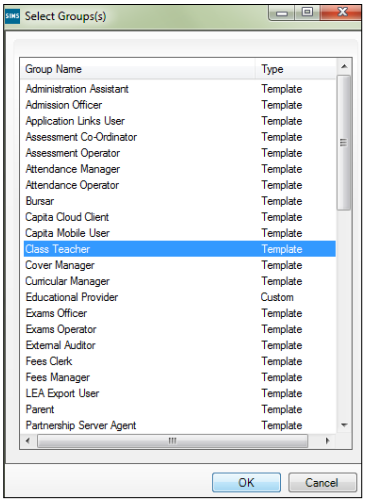
2. Highlight the relevant Group(s) In the **Select Group(s)** box.

3. Click **OK**.

4. The group is added with a **Start Date** matching the **Effective Date** which defaults to today. This can be changed if necessary.

5. Click **Save** at the top of the screen.

6. Make a note of the **Username** and **Password** and issue them to the user.



When they first log in the user will be instructed to change the password.

Managing SIMS Users in System Manager

System Manager is used to manage a school's users of the SIMS system including access rights. Users must be assigned membership of a user group in order to access SIMS and specific levels of access are applied to the group of which users are a member.

As well as assigning new SIMS users using System Manager, it is also important to remove SIMS access from any users that no longer require access, e.g. Leavers and changes in role.

Further details on how to complete these tasks can be found in Book 15 – Housekeeping Routines. It is important that there are no duplicate staff in Personnel for this to work correctly.