



# Instructional Management Program and Academic Communication Tool

## *Quick Guide to SIM 8.4 Upgrade Features*

10/14/2014  
Version 2.0 FINAL

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**\*\*\*Note\*\*\***

*This Quick Guide was developed using a Student Information Management (SIM) environment, version 8.4.1. There may be slight differences between screens in this guide compared to the screens in the actual IMPACT SIM Production environment. All screens were captured in Windows using Internet Explorer. Macintosh views may differ.*



## Introduction

This Quick Guide provides an introduction to some of the new features that end users will encounter in the upgraded SIM environment, as well as existing functionality related to Advanced Searches.

## Basic Navigation Overview

The following section provides an overview of how to navigate around the upgraded SIM environment. Because the *Header*, horizontal *Menu bar*, *Breadcrumbs*, and *Task bar* remain visible on every page in SIM, navigation has been simplified and usability improved.


The screenshot shows the SIM interface with several callouts on the left side pointing to specific UI elements:

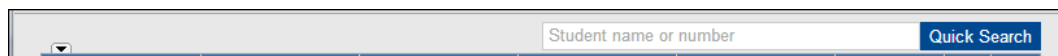
- Header:** Points to the top navigation area containing the Chicago Public Schools logo, IMPACT SIM logo, user name, and navigation links (Help, Support, About, Sign out).
- horizontal Menu bar:** Points to the main navigation tabs: Search, Class, School, Admin, My Reports, Quick Links, and a printer icon.
- Breadcrumbs:** Points to the breadcrumb trail: Home > Quick Search.
- Task bar:** Points to the bottom section of the page, which includes search filters (Active, Incoming, Withdrawn), a search input field, grade level buttons (PE, PK, K, 1-8, 20), and a 'My Favorite Searches' section.

### Header

The **Header** section contains your user name, on-line Help, *Sign out*, *Quick Search* and *Switch role* features. In addition, clicking on the CPS and IMPACT SIM logos is a new way to return quickly to the Home Page.

### Expand/Collapse Header

Use the *Header arrow* (  ) to collapse or expand the *Header*. When the Header is collapsed, note that the *Quick Search* feature remains visible, as illustrated in the following screen capture.





### On-line Help

On-line Help give you access to the vendor Pearson’s help documentation, including information specific to the page currently displayed

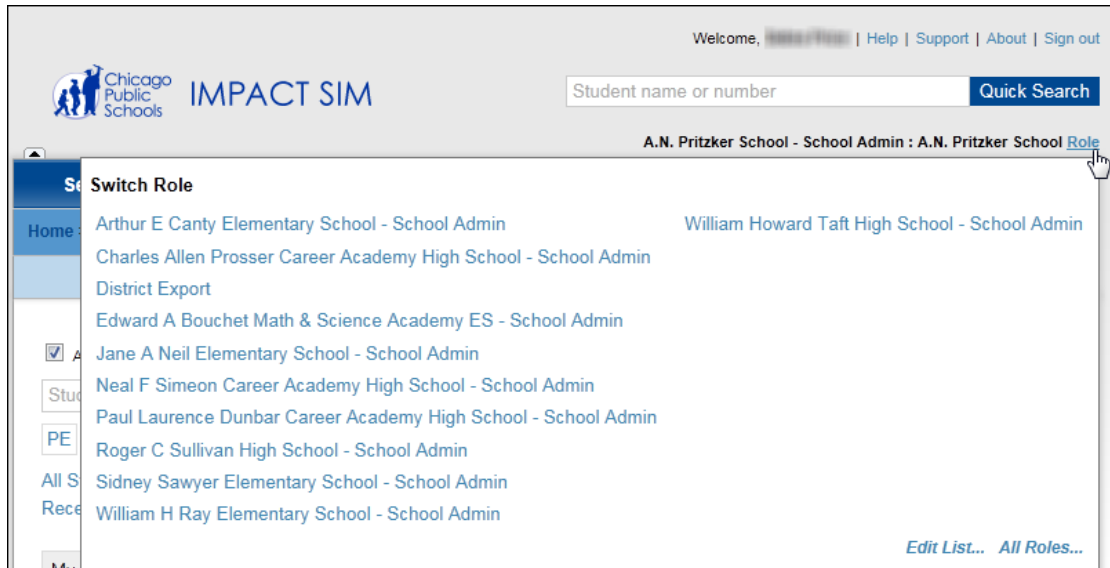
### Quick Search

The *Quick* search is now available from anywhere in the application and enables you to quickly search for students by *last name*, *first name*, or *ID number*. You can search for a particular student or a list of students that matches your criteria.

### Switch Role

Switching role is accessible from anywhere in the application by clicking on the *Role* link, and selecting the desired role in the list. Note that the role name and school is then updated in the *Header* to correspond with the role selected.

Click the *Edit List* link to add your top 20 roles, if applicable, and click the *All Roles* link to access all assigned roles.

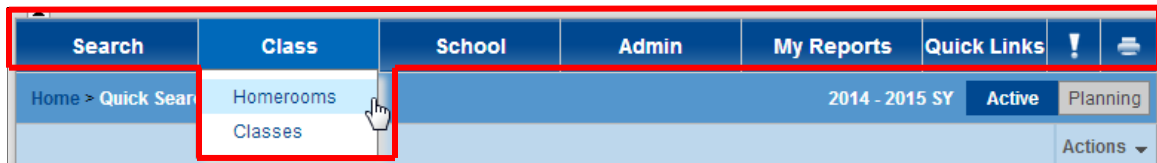




## Horizontal Menu bar

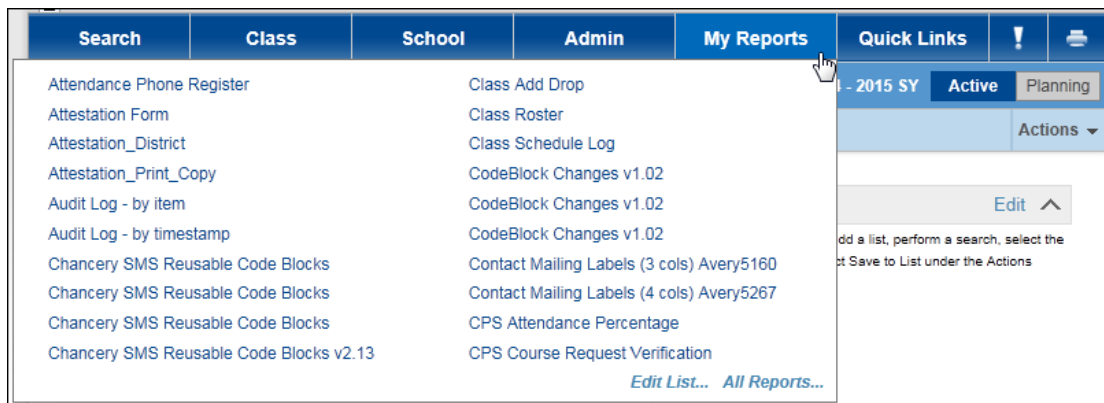
The horizontal **Menu bar** is the main navigation feature. Hovering over each heading on the **Menu bar** displays additional sub-headings, as illustrated in the screen capture below. The horizontal **Menu bar** replaces the previous left side **Control bar**, located on the *Home Page*.

Because the *horizontal Menu bar* displays on every page in SIM, users can quickly navigate to another page in SIM from wherever they currently are in the system.




## My Reports

*My Reports* enables you to specify your top 20 reports so that you will have access to them from anywhere in the system. Click the *Edit List* link to add your top 20, and click the *All Reports* link to access all reports.



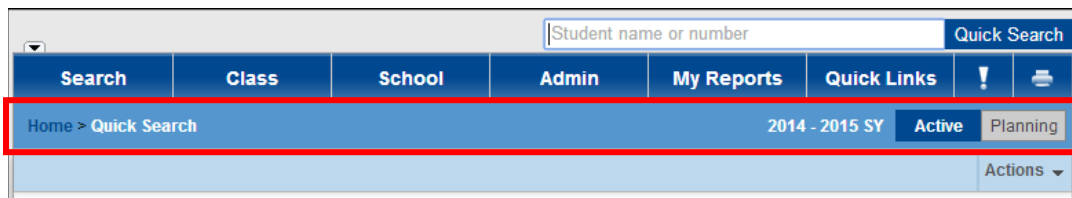
## Page Print

The Print icon (  ) is a quick way to print the entire contents of a page. Previously in SIM, only grids on a page could be printed, not the entire page.



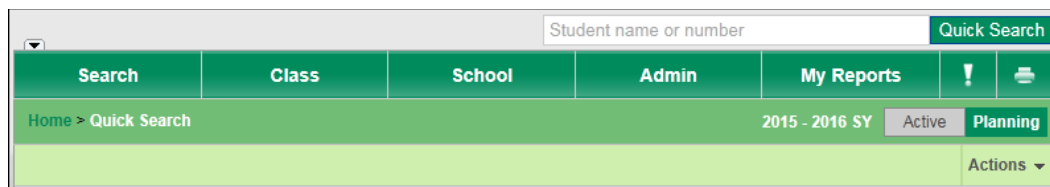
## Breadcrumbs

*Breadcrumbs*, also known as the Page Path, show you where you are in the system and how you got there. You can use the *Breadcrumbs* to navigate back to previous pages or to return to the *Home Page*.



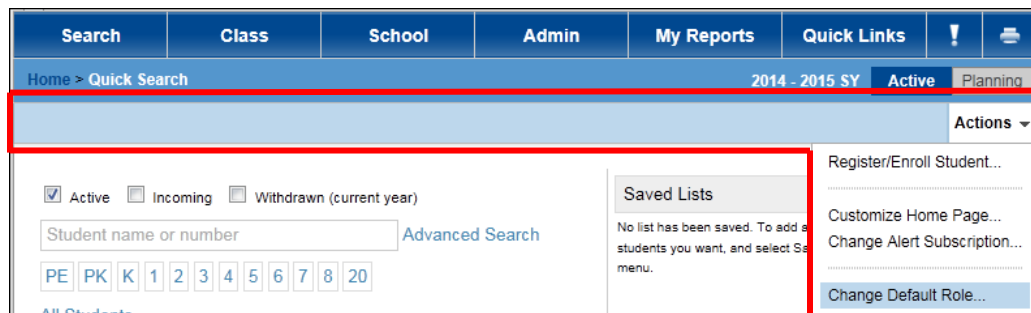
## Active and Planning Calendars

The *Active* and *Planning Calendar* icons are now located on the *Breadcrumbs*, allowing users to quickly switch between them from anywhere in SIM. There is now a clear visual indication of which calendar is currently being displayed with the Active Calendar in blue and the Planning Calendar in green, as illustrated below.



## Task Bar

The *Task bar* contains menus that allow a user to start or complete tasks in SIM. The menu options, such as *Actions*, *Edit*, and *Reports*, will vary depending on which page is displayed.





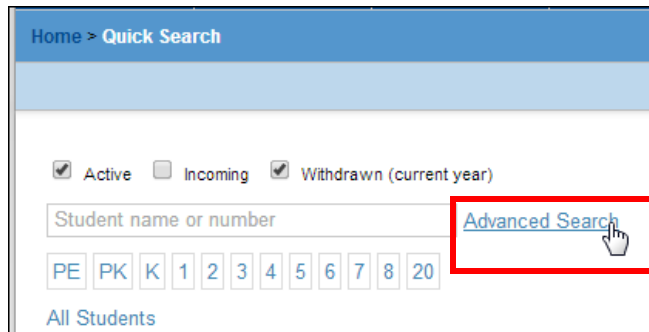
## Advanced Searches

There are two types of advanced searches: *Basic* and *Detail*.

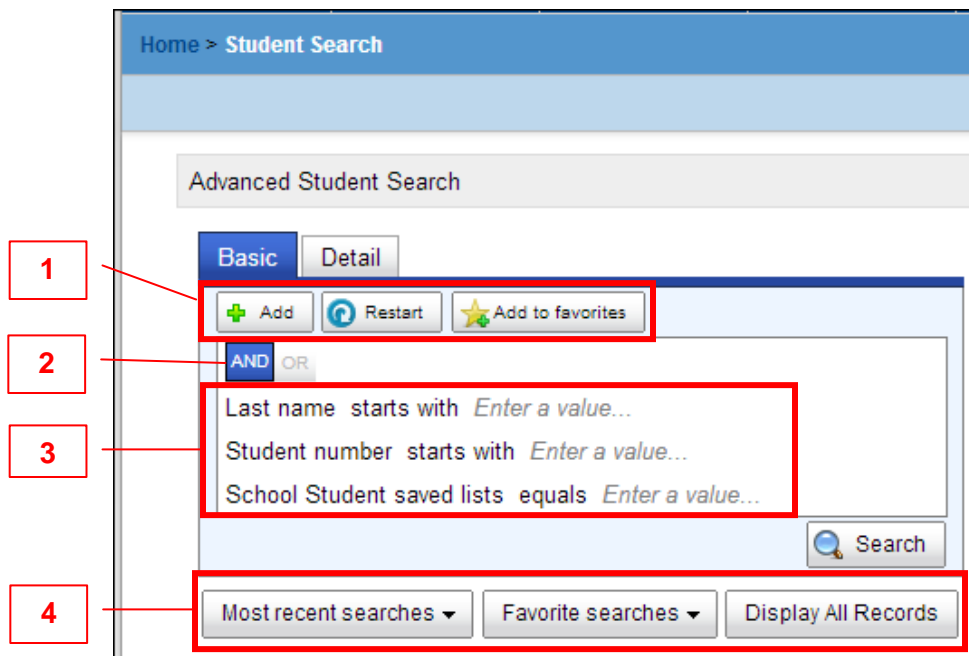
### Basic Search

The following steps describe how to perform a *Basic* search:

1. On the *Home Page*, click the [Advanced Search](#) link.



2. On the *Student Search* page, note the following features available for a *Basic* search:



See next page for explanations of features.

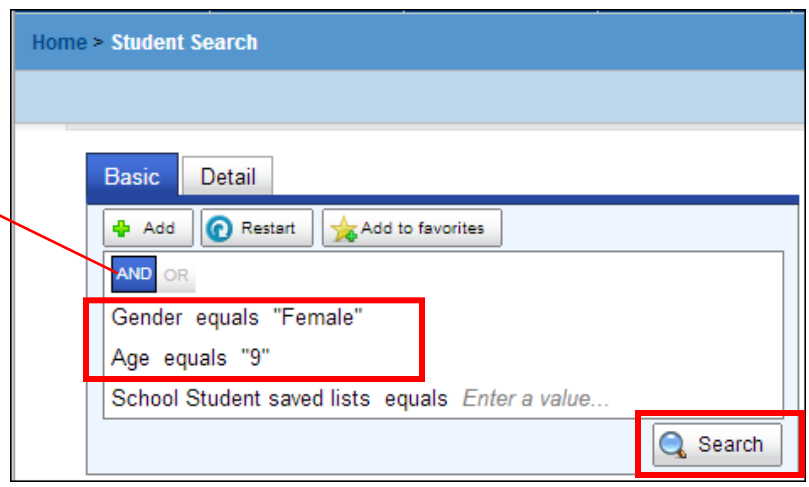




	Feature	Description
1	Add	Adds a new unconfigured search criteria. Use the AND/OR buttons to set the nature of the new criteria.
	Restart	Resets the search criteria to one incomplete search criteria as follows: "Select a field... Operator... Enter a value..."
	Add to Favorites	Saves the search criteria you have configured
2	AND	Sets the search to find students who match <i>all</i> of the criteria in the list. In general, this generates fewer results.
	OR	Sets the search to find students who match <i>any</i> of the criteria in the list. In general, this generates more results.
3	Search Criteria	Consists of three parts: Field, Operator, Value (e.g., "Last Name equals Smith"). Click each part and enter the desired search criteria.
4	Most recent searches	Remembers your 10 most recent searches so that you can re-run them if you wish
	Favorite Searches	Saves any search for reuse as a <i>favorite search</i> under a name of your choice
	Display All Records	Displays all records for which your role has permission

- Enter your search criteria, as illustrated in the screen capture below (for example, all female students who are age 9).

Note: AND is selected so that only Females who are 9 will be displayed in search results.





4. Click **Search**. The results display in the *Search Results* section.

Home > Student Search 2014 - 2015 SY **Active**

Actions ▾ Re

Advanced Student Search ▾

Search Results ^

View: (G) StudentSearchDefaultView ▾ Edit  Active  Incoming  Withdrawn (current year)

Selected: 0 Search within results: Rows: 30 ▾ Page 1 of 2 Total: 37

<input type="checkbox"/>	Student Name (LFM)	ID	Gr(A)	HR(A)	Gender	Birth Date
<input type="checkbox"/>	...	...	4	A208	F	...
<input type="checkbox"/>	...	...	4	A208	F	...
<input type="checkbox"/>	...	...	4	A208	F	...
<input type="checkbox"/>	...	...	4	A208	F	...

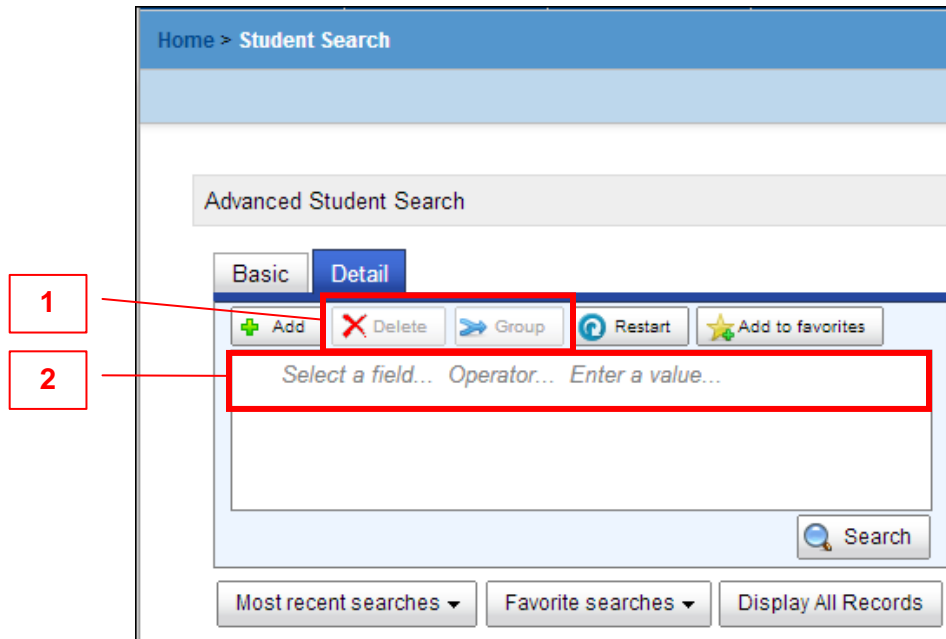


## Detail Search

Using a detail student search, you can search by one or more fields (including custom fields). This search involves building a set of criteria, which can be grouped and organized logically using AND/OR statements.

The following steps describe how to perform a *Detail* search:

1. On the *Home Page*, click the *Advanced Search* link.
2. In addition to some of the same *Basic* features, note the additional features available for a *Detail* search.



	Feature	Description
1	Delete	Deletes the selected criteria
	Group	Groups two or more selected criteria into a separate group.
2	Search Criteria	Consists of three parts: Field, Operator, Value (e.g., "Last Name equals Smith"). Click each part and enter the desired search criteria.



3. Enter your search criteria (for example, students whose last name starts with an “A” or “B” **AND** they are in grade “11” or “12” **AND** their Service Learning Hours are at least 20 or more”).

The screenshot shows the 'Student Search' interface with the following elements:

- Home > Student Search** (Breadcrumbs)
- Basic** / **Detail** (Tabs)
- Buttons: **+ Add**, **X Delete**, **→ Group**, **↻ Restart**, **★ Add to favorites**
- Search Criteria:
  - Group 1: Last name starts with "a" AND OR Last name starts with "b"
  - Group 2: Grade Level (Active) equals "Eleventh Grade" AND OR Grade Level (Active) equals "Twelfth Grade"
  - Group 3: Category: Service Learning Records (pop-up box)
- Pop-up Box (Group 3):
  - Category: Service Learning Records
  - Fields: Date completed, Date Modified, Hours earned, Last Modified By, Type of Service

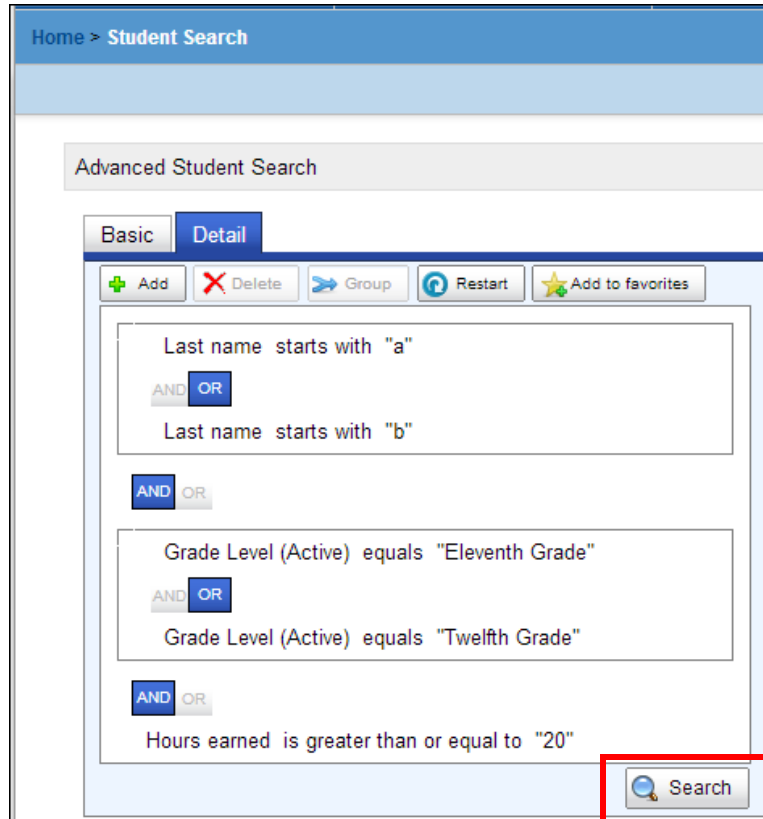
**Note:** 1<sup>st</sup> group of Last Name "A" or "B"

**Note:** 2<sup>nd</sup> group of Grade Level "11" or "12"

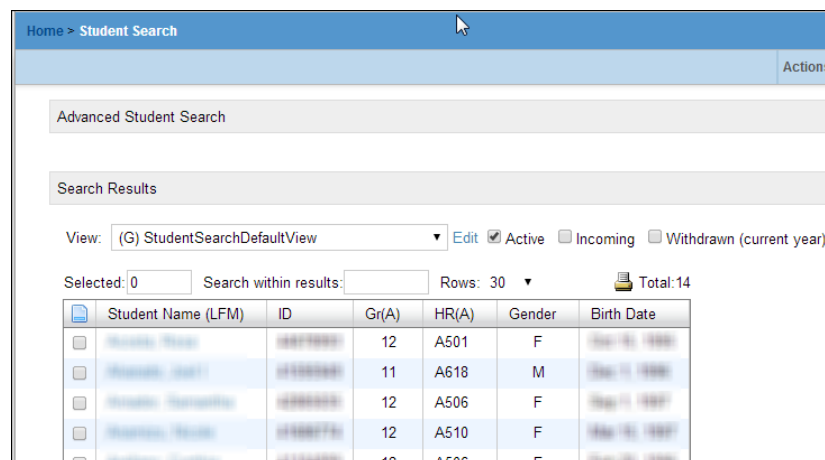
**Note:** Clicking the *Field* search criteria yields the following pop-up box. You can then select the desired *Category* and *Field* name. In this example, *Hours earned*.



The following screen capture illustrates the final search criteria.



4. Click *Search*. The results display in the *Search Results* section. See page 11 for options to adjust/filter your search results.





## Adjusting Student Search Results

SIM displays student search results on one or more pages. **There is no limit to the number of results SIM can now display**; however you can only select up to 1000 at a time.

The following options allow you to adjust student search results:

View drop-down list enables you to change to another grid view. See page 13 for details.

1

2


3

Search Results



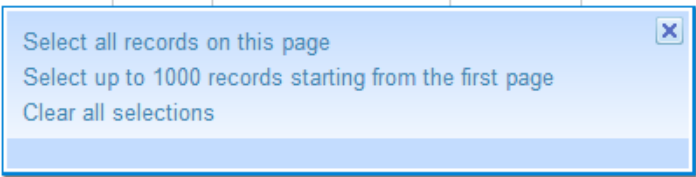
View: (G) StudentSearchDefaultView Edit  Active  Incoming  Withdrawn (current year)

Selected: 0 Search within results: Rows: 30 Page 1 of 51 Total: 1515

Student Name (LFM)	ID	Gr(A)	HR(A)	Gender	Birth Date
		9	A803	M	
		10	A701	M	

	Feature	Description
1	Active, Incoming, Withdrawn (current year)	Select or Deselect desired student options  For example, selecting the <i>Withdrawn (current year)</i> checkbox will display students who have been withdrawn for the current school year.
2	Search within results	Enables you to filter the list of results  To search within results, enter the desired criteria (for instance, "pre"). SIM will then display all students whose first or last name contains "pre".
	Rows dropdown list	Enables you to change the number of rows that SIM displays on each page of results
	Paging Controls (Page # of #)	Indicates the number of pages of records (which varies according to the number of rows)
	Print View icon (  )	Displays the current list in a printable format (may span multiple pages).  Click the right arrow to display the next page, the left arrow to display the previous page.



	Feature	Description
3	<i>Select All / Deselect All icon</i>  [  ]	<p>Enables you to select all records on the page. You can select up to 1000 at once, across all pages.</p> <p>The following screen capture illustrates the options available when clicking the <i>Select All/Deselect All</i> icon.</p> 
	<i>Column Headings</i>	<p>Displays information from a student record field.</p> <p>Click a column heading to sort the list on the contents of that heading.</p>



## User Settings

Rather than adjusting the display of your search results each time you view it, you can apply a *pre-configured grid view*. Note the following:

- A **grid view defines the columns displayed and the initial sorting of the information that appears in those columns.**
- The grid view that you choose to apply can be a *personal grid view*, which is particular to each user, or a *global grid view*, which is set up by a District Administrator for the use of others.
- A “(P)” indicates a personal grid view and a “(G)” indicates a global grid view, as illustrated in the screen capture below.

### Select an Existing Grid View

The following steps describe how to apply an existing grid view to a set of search results:

1. In the *Search Results* section, click the *View* drop-down list arrow.

Search Results

View: (G) PE Waiver Tracking (checked)  Active  Incoming  Withdrawn (current year)

Select: (G) Graduation Status School Rows: 30 Page 3 of 51 Total: 1515

(G) PE Waiver Tracking (highlighted)

(G) StudentSearchDefaultView

(A)	Gender	Birth Date
	M	
	M	

2. Select another view to apply to your search results (for example, (G) *PE Waiver Tracking*). Your search results are now displayed with this new view, as illustrated in the screen capture below.

Search Results

View: (G) PE Waiver Tracking Edit  Active  Incoming  Withdrawn (current year)

Selected: 0 Search within results: Rows: 30 Page 3 of 51 Total: 1515

Student Name (FML)	ID	Gr(A)	HR(A)	Counselor (A)	PE III Waiver Requested	PE IV Waiver Requested
		10	A706		N/A	N/A
		10	A706		N/A	N/A
		10	A707		N/A	N/A
		10	A707		N/A	N/A

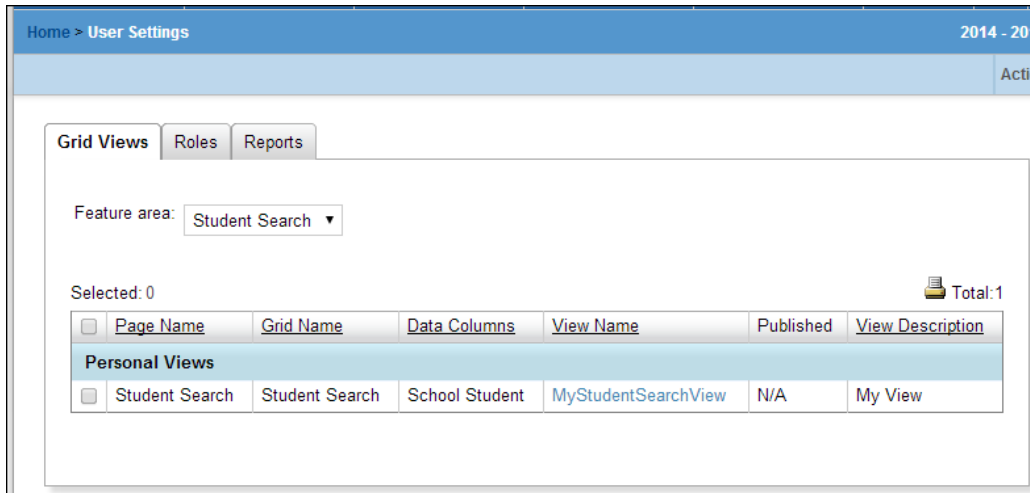




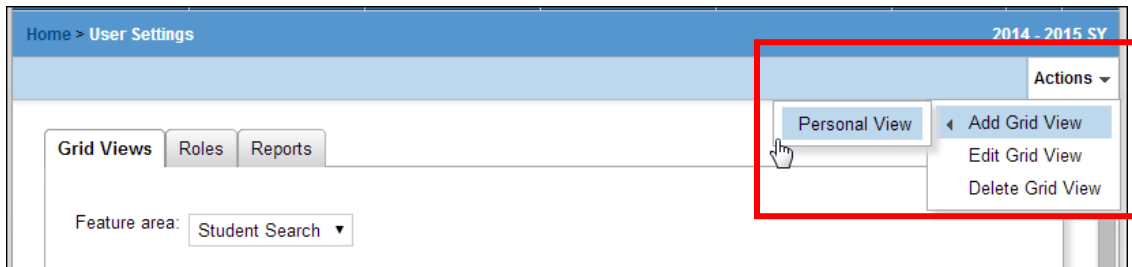
### Set up a New Grid View

The following steps describe how to set up a new grid view to a set of search results:

1. On the horizontal *Menu bar*, under *Admin*, click *User Settings*. The *User Settings* page appears and displays a list of grid views available to you.



2. Under *Grid Views*, select a *Feature Area* (if applicable).
3. From the *Task Bar*, select *Actions > Add Grid View > Personal View*. The *Personal Grid View* page appears and displays a list of pages for the selected feature area.





4. On the *Personal Grid View* page, complete the following information:

Enter *View name*. *View Description* is optional.

In the list of pages, select the *Page Name/Grid Name* combination to which you want the personal grid view to apply.  
  
Note: the pages available will depend upon the user's role.

Home > User Settings > Personal Grid View 2014 - 2015 SY

Feature area: Student Search

\*View name: Student Federal Ethnic and Race Categories

View description:

The information below represents a list of all grids that are available for the Student Search feature area for which you can create a personal grid view. Select a row to define a personal view for a specific grid.

Selected: 1 Total: 3

<input type="checkbox"/>	Page Name	Grid Name	Data Columns
<input type="checkbox"/>	Registration/Enrollment Search	Registration/Enrollment Search	Registration/Enrollment Search
<input type="checkbox"/>	Student Search	Past Year Student Search	Past Year School Student
<input checked="" type="checkbox"/>	Student Search	Student Search	School Student

\*Required Continue Cancel

5. Click *Continue*.

Under *Define Columns*, select the columns to be displayed.  
  
Note that you can click the select link to copy from an existing global or personal view.

Home > User Settings > Personal Grid View 2014 - 2015 SY

Student Federal Ethnic and Race Categories

Feature area: Student Search

View name: Student Federal Ethnic and Race Categories

View description:

Page name: Student Search

Grid name: Student Search

Data columns: School Student

You may select an existing global or personal view as a starting point for defining columns and sorting below.

Define Columns

Category: Main

Available columns: AP Version, Contact, Counselor (P), Gr(P), HR(A), HR(P), Home Phone

Selected columns: Student Name (LFM), ID, Birth Date, Gender, Gr(A), Federal Ethnic Category, Federal Race Category

Total: 9

indicates column cannot be deselected OK Cancel



6. Scroll down to the *Define Sorting* section, and select the column by which your search results should be sorted.

7. Click **OK**. Your personal grid view is created.

Page Name	Grid Name	Data Columns	View Name	Published	View Description
Student Search	Student Search	School Student	MyStudentSearchView	N/A	My View
Student Search	Student Search	School Student	Student Federal Ethnic and Race Categories	N/A	

Reminder: Your Personal grid view is now available under the *Search Results* section (on the *Advanced Student Search* page).



## Report Options “Save” Feature

When running reports, there is now a new feature on the *Report Options* page which allows you to save the settings you used to run the report, as illustrated in the screen capture below.

SIM allows you to save up to 50 report options for each report.

Select desired options for the report. Click **Save** to name and save report to run at a later date.

Select desired options for report. Click **Save and Run** to save the report, and run now.