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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.

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.
Quick Guide to SIM 8.4 Upgrade Features

**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 all of the criteria in the list. In general, this generates fewer results.
| **OR**
| Sets the search to find students who match any 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 favorite search under a name of your choice
| **Display All Records**
| Displays all records for which your role has permission

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

![Screen Capture](image)

**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.
**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.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> Delete</td>
<td>Deletes the selected criteria</td>
</tr>
<tr>
<td>Group</td>
<td>Groups two or more selected criteria into a separate group.</td>
</tr>
<tr>
<td><strong>2</strong> Search Criteria</td>
<td>Consists of three parts: Field, Operator, Value (e.g., “Last Name equals Smith”). Click each part and enter the desired search criteria.</td>
</tr>
</tbody>
</table>
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”).

**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:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1 | **Active, Incoming, Withdrawn (current year)** Select or Deselect desired student options  
For example, selecting the **Withdrawn (current year)** 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”. |
| 3 | **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. |

View drop-down list enables you to change to another grid view. See page 13 for details.
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select All / Deselect All icon</strong></td>
<td>Enables you to select all records on the page. You can select up to 1000 at once, across all pages.</td>
</tr>
<tr>
<td><img src="image" alt="Select All icon" /></td>
<td>The following screen capture illustrates the options available when clicking the Select All/Deselect All icon.</td>
</tr>
<tr>
<td><img src="image" alt="Select All options" /></td>
<td>Select all records on this page Select up to 1000 records starting from the first page Clear all selections</td>
</tr>
<tr>
<td><strong>Column Headings</strong></td>
<td>Displays information from a student record field.</td>
</tr>
<tr>
<td><img src="image" alt="Column Headings" /></td>
<td>Click a column heading to sort the list on the contents of that heading.</td>
</tr>
</tbody>
</table>
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.

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.
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.

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.
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.

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.