

# ParentMail – SIMS data Auto Sync: Installation & Configuration Instructions

### This installation is to be completed by your IT technician.

#### Important Note:

These instructions are for schools with SIMS hosted locally on site, and WILL NOT work for schools using SIMS hosted centrally i.e. by Local Authorities. If you do have SIMS hosted locally, you will need to have access to your host machine to complete the installation.

#### Introduction

Our new SIMS application will automatically transfer pupil and parent data from SIMS directly into ParentMail and update each night. This will not change any of your data in SIMS, as it will only transfer one way, which means all you need to do is keep on top of your SIMS data, and we'll do the rest!

Below are instructions to install and configure your SIMS Auto Link. Please follow these instructions very carefully to install it correctly.

#### Prerequisites

Microsoft Windows	7 SP1 or 8 or 8.1 or later	32-bit or 64-bit
Microsoft Windows Server	2008 R2 SP2 or 2012 or 2012 R2 or later	64-bit
Microsoft .NET Framework	4.6.1 or later	depends on operating system
Microsoft SQL Server	2012 or later	depends on operating system
Capita SIMS	7.156 or later	

### Preparation

- Log in as the main administrator on the host machine or SIMS server directly and then log in to ParentMail (https://pmx.parentmail.co.uk) as the Organisation Administrator. Please note, you will need to be able to write to your c:\drive to complete this installation successfully.
- To set up the SIMS Auto Link, go to Settings then select MIS Link.





### From the drop down menu, select SIMS.

MIS Link		
he MIS Link autom I your MIS system,	atically transfers data from your MIS directly into ParentMail and updates when there are changes recognised. The link will not change any c as it will only transfer one way, which means all you need to do is keep on top of your MIS data, and we'll do the rest!	f the da
o get started pleas	e choose your MIS provider from the drop down menu below:	
Select MIS		
Select MIS		
Select MIS Select MIS Progresso		
Select MIS Select MIS Progresso Integris		

## Download the installer required by clicking on the blue 'Report Exporter Installer' button.



At this point you can generate your API Key. You will need this later in the process. Please note, you will need to select the green 'Enable Autolink' button for the auto link to work.

### Installing the SIMS Auto Link application

- Once downloaded, click run.
- · Read and accept the terms and conditions, then proceed
- Confirm the Install path which by default is C:\Program Files\ParentMail\SIMS AutoLink\ - Please note the application **must** be saved to this file path.
- Click Install and close the install wizard once complete.



 Go to ParentMail and download the required .rptdef files from the Imports > Create Import page saving them to C:\Program Files\ParentMail\SIMS AutoLink. If you are not using Parents' Evening Manager on ParentMail you will only need the 'staff export.rptdef' and 'student parent export.rptdef.'

# Configure the ParentMail – SIMS Auto Link application

These instructions are for a new installation of the Auto Link.

• Launch the 'Config Manager' from your Start menu



- Select "Run the setup wizard" from the File menu
- Select the "Run Complete Setup" option



P	ParentMail SIMS AutoLink Config Manager	×
File Tools Help		
Run the setup wizard	Target ID	
Open Ctrl+O	0819e059-2af2-46a9-9af3-fac4b9084eeb	
Save Ctrl+S	Base Location	
Evit	C:\SIMS Auto 16-04	
EAR	Report Definitions Path	
	Definitions	
	Report Archives Path	
	Archives	

• Select the "Create a new configuration" option



• Click the ... button to generate a new Site ID (You are free to create your own ID but the easiest way is to let us generate one for you) then click next.





Click the ... button and locate C:\Program Files\ParentMail\SIMS AutoLink then click
 next

Lonfigure the Base L	ocation
Select the folder under whi	ch report definitions and report archives can be stored.
Report definitions are used	by Capita SIMS to generate reports to be exported to ParentMail.
Report archives contain the ParentMail in each export.	e generated reports as well as some related metadata sent to
C:\Program Files\ParentM	ail\SIMS AutoLink
Report Definitions Path	
C:\Program Files\ParentM	ail\SIMS AutoLink\Definitions
Report Archives Path	
	ail/SIMS Autol int/Archives

• Save the logs to your C:\ drive then click next.





ParentMail

Select "Yes" to add a new school then click next

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• Enter the API key. To find your API key go to your ParentMail Account > Settings > MIS Link and copy and paste the code from here then click next.

Tip – When you are copying and pasting the API Key, make sure you do not have any spaces before or after the code as this will stop the config manager from running the reports.

100	entimal sims Autocink Coning Manager
Defi	ne the API Key for the school
Туре	or paste the API Key in the space given below that has been given to you by ParentMail
The A expor	VPI Key is used to identify this school to ParentMail, so that ParentMail can ensure the ts generated only affect the records of this school.
UXM	pULDPZ1NrwdXvcPUk2zNVwxWY9YDvXPkuZbHLBwodvkzGFHvISVFPlvZdcEgx

- Open Computer > C: drive > Program Files > SIMS then find the connect.ini file.
- Please note the connect.ini file may redirect you to another file path on your system i.e. S:/SIMS. If this is the case, go to this drive and find the connect.ini file which will have the information you need.
- The 'Server and Instance' is what appears as the server name. Copy and paste everything that appears after the equals sign e.g. 'SIMSNET2K8\SIMS'
- The catalog name is what appears as the database name in the connect.ini file.
- Then add your SIMS username and password and click next. Please note, the SIMS user that you assign to the Auto Link will need to have the following permissions:



- o Third Party Reporting
- o Personnel Officer
- o Admin Assistant

D	Contraction and the first second second
D	efine the database connection details for the school
Ţ	ype the database connection details for the school in the spaces given below.
Ti th au	he server and instance specify the SQL Server in use by Capita SIMS. The catalog name specifi ne name of the database in use by Capita SIMS. The username and password are used for uthentication to Capita SIMS.
Se	erver and Instance
S	IMSNET2K8\SIMS
C	atalog
S	IMSGA_159
U	sername
P	Parent Mail
P	assword
-	****

You now need to add a new report definition. **Please note** you will only need to add all four reports if you are using Parents' Evening Manager. If not, you will only need to download the Student Parent Export and Staff Export.

Parentivian Sivis AutoLink Config Manager	
Define the name of the report	
Type the name and type and select the report definition for the report in the sp	oace given below
The name should match the name of the report as defined in the report definit	ton.
Name	
Name PMX2 Student Parent Export	
Name PMX2 Student Parent Export Type	
Name PMX2 Student Parent Export Type csv	
Name PMX2 Student Parent Export Type csv File	

- Name Should be one of:
  - PMX2 Student Parent Export
  - PMX2 Staff Export
  - PMX2 Class Teacher Export
  - PMX2 Tutors Export
- Type Is always csv



Please note: The name of the report must match exactly with the above, please ensure that you do not have a space **before** or **after** as this will cause errors.

○ File – Locate the files in C:\Program Files\ParentMail\SIMS AutoLink

ParentMail SIMS AutoLink Config Mana	ger		
Define the type of the report			
Type the type name and type signature fo	r the report in the spa	e given below.	
The type signature must match the type s Type Name	gnature provided by F	arentMail for this repor	rt.
PMX2 Student Parent Export			
Type Signature			
260701621-646-22702007-240252			

- The Type Name should match the report name from the previous step.
- Type Signature We would advise that you copy and paste the 'Type Signature from this guide or within ParentMail > Settings > SIMS Auto Link.
  - PMX2 Student Parent Export 2f07016ca2b646c327020ae97e2d9252
  - PMX2 Staff Export ecdc2d99d90ba8cf982a95b2d3132f5d
  - PMX2 Class Teacher Export 4410e1f9d45349369ba17551e9295ade
  - PMX2 Tutors Export 8eb4b7b2349f18470197168c54d2a0c9

# Please note: The name of the report and type signature must match exactly with the above, please ensure that you do not have a space **before** or **after** as this will cause errors.

- Repeat the 'Add Report' step for each report definition required for synchronization
- Once you have finished adding reports, you can select the 'No' option when asked if you want to add another report.
- Confirm your configuration in the end step and finish the configuration wizard
- You **MUST** save the configuration for the settings to take effect (File and Save)
- Make sure that the ParentMail SIMS Auto Link Report Exporter service is running in the Services Manager. To check this, go to Tools > Services Manager.

### **Optional Configuration Options**

Proxy – If you are using a proxy you will need to configure the ParentMail – SIMS data Auto Sync application with your proxy settings. To check if you have a proxy, please go to Control Panel > Internet Options > Connections > LAN Settings > Advanced and you will be able to see if the proxy server details are filled in. If the advanced box is greyed out, it means you are not using a proxy and can ignore this step.

	Internet Optio	ons		? ×			Proxy Settings		
meral   Security   Privacy	Content Conn	ections	Programs	Advanced	Servers				
To set up an Inte Setup.	met connection, d	lick	Setu	P	3 m	Type	Proxy address to use		Port
Xal-up and Virtual Private	Network settings	-				HTTP:	localhost	:	8080
			Add.			Secure:	localhost	:	8080
			Add VP	N		FTP:	localhost	:	8080
			Remov	e		Socks:		:	
Choose Settings if you ne server for a connection.	ed to configure a	proxy	Settr	gs		✔Use th	e same proxy server for all prot	tocols	
					Exception	ns			
Local Area Network (LAN)	settings				<b>G</b>	Do not use	e proxy server for addresses be	eginning with	
LAN Settings do not appl Choose Settings above fi	y to dial-up conner for dial-up settings	ctions.	LAN set	tings					< >
						Use semico	olons ( ; ) to separate entries.		
	~	0	ecal	Annia			OK		Cancel

If your school is using a proxy, you will need to tick the Enable and Bypass for local addresses box on the screenshot below. You will then need to copy and paste the proxy addresses and ports from your advanced LAN settings into the proxy window, as seen below.

S	ParentMail SIMS AutoLink Config Manager	- 🗆 🗙
File Tools Help		
File Tools Help	Proxy         Enable         Bypass for local addresses         Use the same server for all protocols         Servers         HTTP         FTP         Secure         Socks         Exceptions	
C:\Program Files\ParentMail\SIMS AutoL	nk\Report Exporter\ParentMail.SimsAutoLink.ReportExporter.exe	Changed



• FireWall – The Auto SIMS data application uses port 9002 by default so your FireWall will need to allow traffic through this port

	Options
Downloads Location	
C:\Data\Downloads	
<ul> <li>Overwrite existing files</li> </ul>	when saving configuration
Use Report Generator	service
Report Generator Service (	Configuration
Host	
localhost	
Port	
9002	
	OK Cancel

### Verify Connectivity and Manual Data synchronisation

- Once everything is configured you can verify your connectivity with ParentMail by clicking the Ping button from the School Details page.
- If the "Last pinged at" box populates with a date and time then connectivity has been established.

Ð	ParentMail SIMS AutoLink Config Manager – 🗖 🗙					
File Tools Help						
⊡@ Target ∰ Proxy ⊡∰ Schools ⊕∰ SIMS Auto 16/04	School ID WupGXSuzaaYBnIV3an3s64AMsICJAV1DAPdG15JMRLfJYkahydTLuX5UD7aFzfvN					
	Disable Name					
	SIMS Auto 16/04					
	Post Code					
	PE4 6EE					
	Server					
	SIMSNET2K8\SIMS					
	Catalog					
	SIMSGA_159					
	Usemame					
	ParentMail					
	Password					
	Last pinged at					
	06/06/2015 11:24:06					
	Last synced at					
	05/06/2015 07:53:33					
	Refresh Ping Sync Download					

- Once connectivity has been established you can manually request a data synchronisation by clicking the Sync button from the School Details page. The "Last synced at" box populates with a date and time that the sync completed.
- You can then check the Imports list in ParentMail to confirm if the data has been processed. To do this, go to ParentMail > Imports.



#### Troubleshooting

Once you have selected 'Ping' you will see a date and time. If you don't see this, you will need to go back to your log files and see where the Auto SIMS link has broken.

If your Auto Link is unable to ping, sync or import, please follow these simple steps to resolve the problem:

- Are you receiving an error message when you run the installer? You will receive this if you do not have microsoft.net framework 4.6.1 or higher on your computer. <u>You can download this for</u> <u>free here.</u> Please note: This will take around 5 minutes and your computer will need to be restarted afterwards
- 2. Have you set the base location to C:\Program Files\ParentMail\SIMS AutoLink?
- 3. Have you checked your reports? The name of the reports needs to be exactly the same as it is on the instructions with no spaces or additions. Please make sure they are saved in the base location C:\Program Files\ParentMail\SIMS AutoLink
- 4. Have you checked your SIMS login details are correct and that your account has the relevant permissions required to run the report? The account will need Third Party Reporting, Personnel Officer and Admin Assistant permissions.
- 5. Is the SIMS database location correct? When looking at your connect.ini file it may show a redirect to another location.
- Do you require a proxy server set up? You can check this by looking in Internet Options > Connections > LAN Settings > Proxy Server. (You may need to check your advanced proxy settings if the box is ticked, but no address appears).
- 7. Once you have completed all of the above, save the configuration by clicking File then Save in the configuration manager.

- 8. Click Ping then Sync. If you do not get presented with a date and time in both boxes you will need to locate the log file and email this to ParentMail for further help. It is likely that your file will be in C:\logs\parentmailreportexporter and will be names today's date.
- 9. If you get a date and time stamp, you will have one more thing to check. Log in to pmx.parentmail.co.uk and go to Imports. From here, select Imports again and you will see the file names of all your imports. If your Auto Link is working correctly, you will see a new import for today with (autolink) next to it.
- 10. If you cannot see a new import, please go to Live Chat and a member of our Support team will be able to help check what the fault is and direct you to the fix.
- 11. When you finish the setup wizard, if you are unable to save the configuration, you will need to ensure you have permission to save in the ParentMail folder on the C Drive on your machine. To do this, go to Start > Computer > C:/ > Program Files > Right click on ParentMail and select Properties > Security > Advanced >Change Permissions> Add. Type 'everyone' in the object name box, select 'check names', then click OK. Then click 'Apply' and then OK on the open security windows. You can now go back to the configuration manager and retry to save the configuration.