

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!

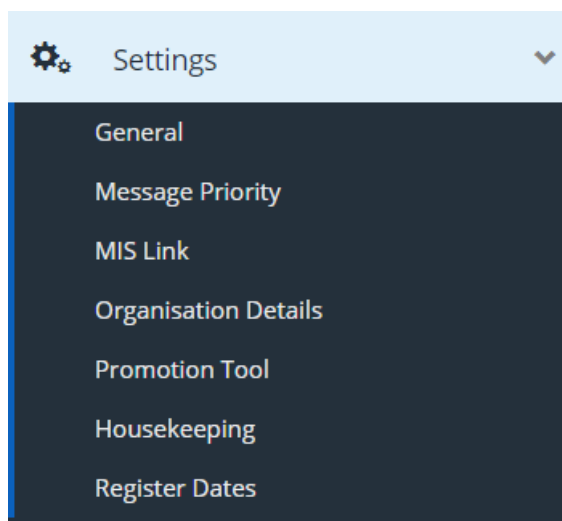
Below are instructions to install and configure your SIMS Auto Link. Please follow these instructions very carefully to install it correctly.

Prerequisites

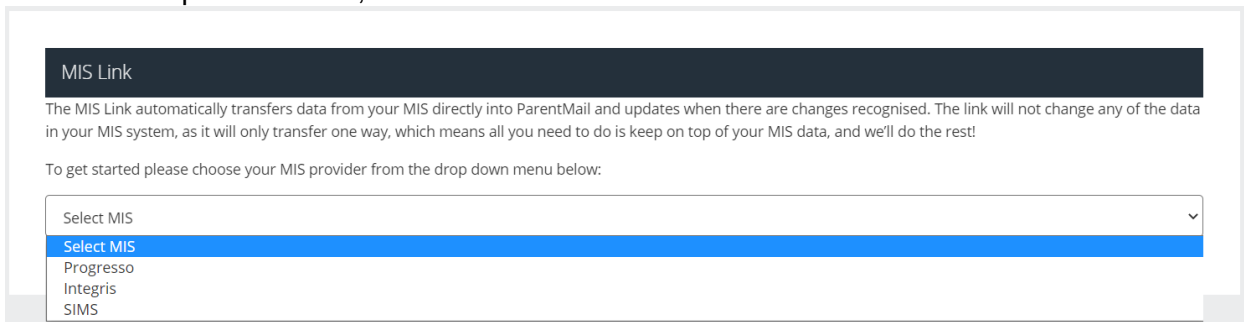
Microsoft Windows	7 SP1 or 8 or 8.1 or later	32-bit or 64-bit
Microsoft Windows Server	2008 R2 SP2 or 2012 or 2012 R2 or later	64-bit
Microsoft .NET Framework	4.6.1 or later	<i>depends on operating system</i>
Microsoft SQL Server	2012 or later	<i>depends on operating system</i>
Capita SIMS	7.156 or later	

Preparation

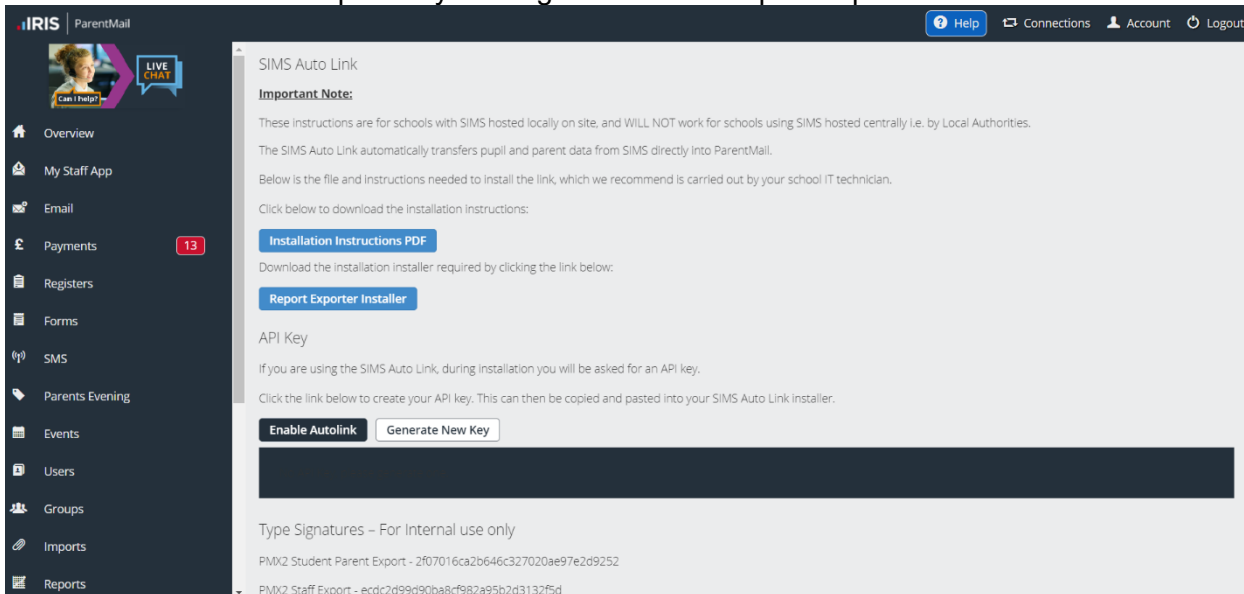
- Log in as the main administrator on the host machine or SIMS server directly and then log in to ParentMail (<https://pmx.parentmail.co.uk>) as the Organisation Administrator. Please note, you will need to be able to write to your c:\drive to complete this installation successfully.
- To set up the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



From the drop down menu, select SIMS.



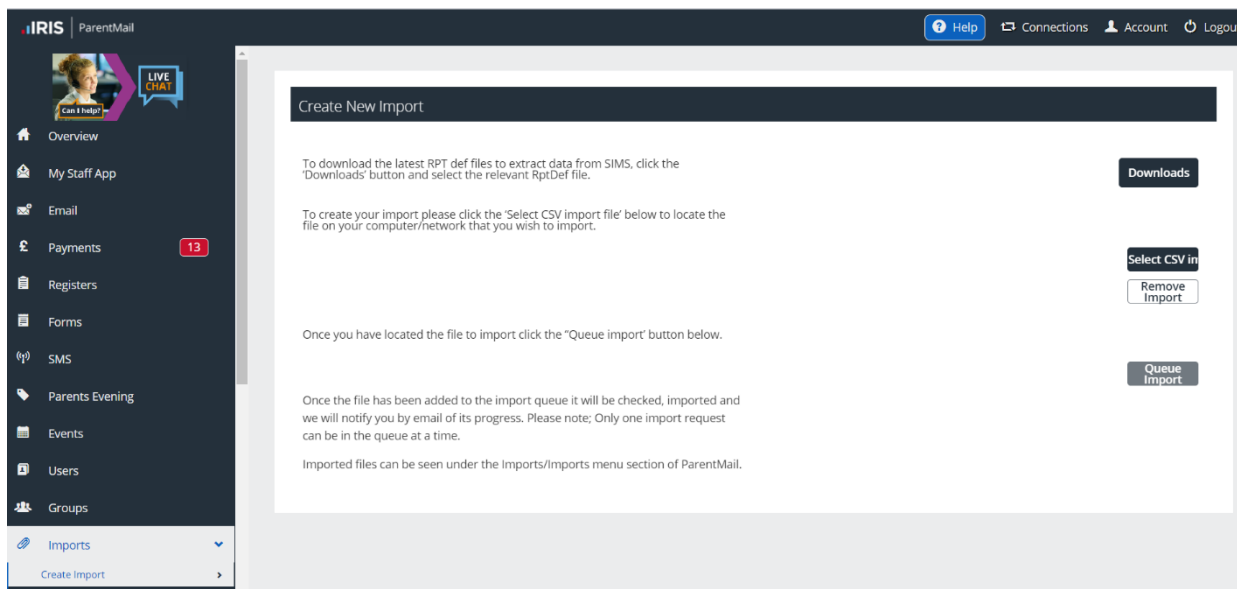
Download the installer required by clicking on the blue 'Report Exporter Installer' button.



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.'

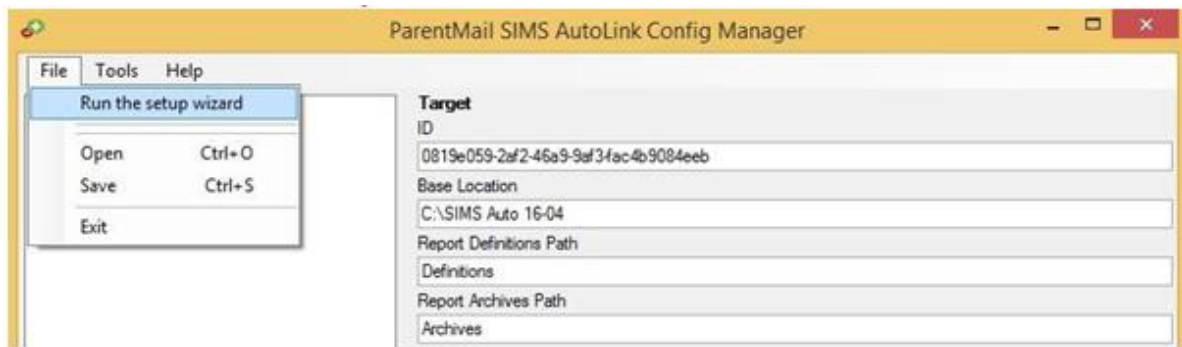
Configure the ParentMail – SIMS Auto Link application

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



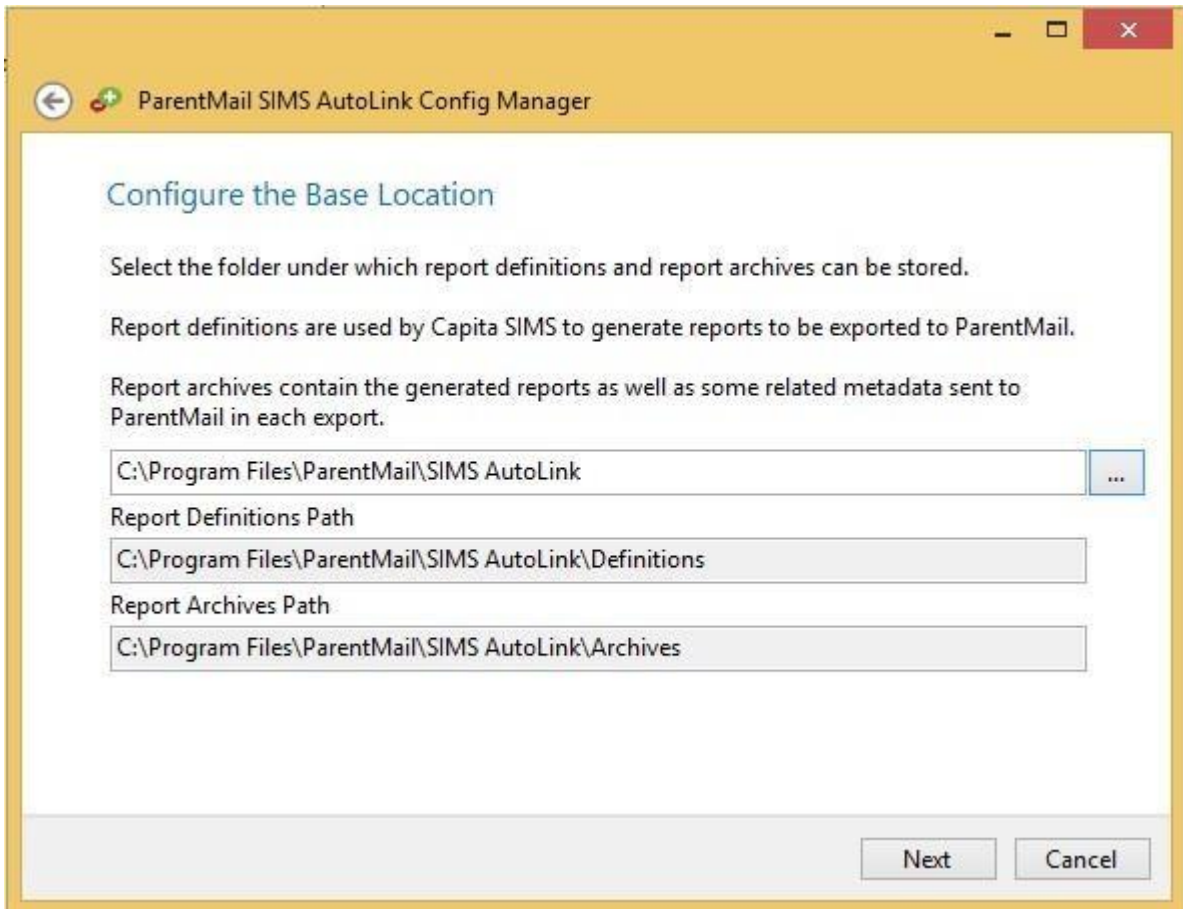
- Select the “Create a new configuration” option



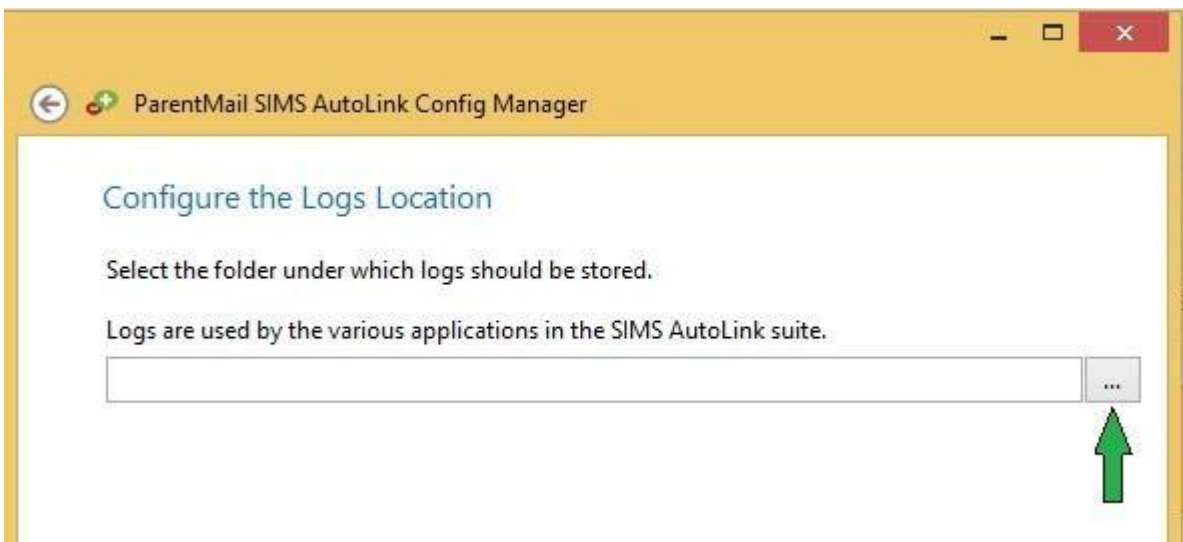
- Click the ... button to generate a new Site ID (You are free to create your own ID but the easiest way is to let us generate one for you) then click next.



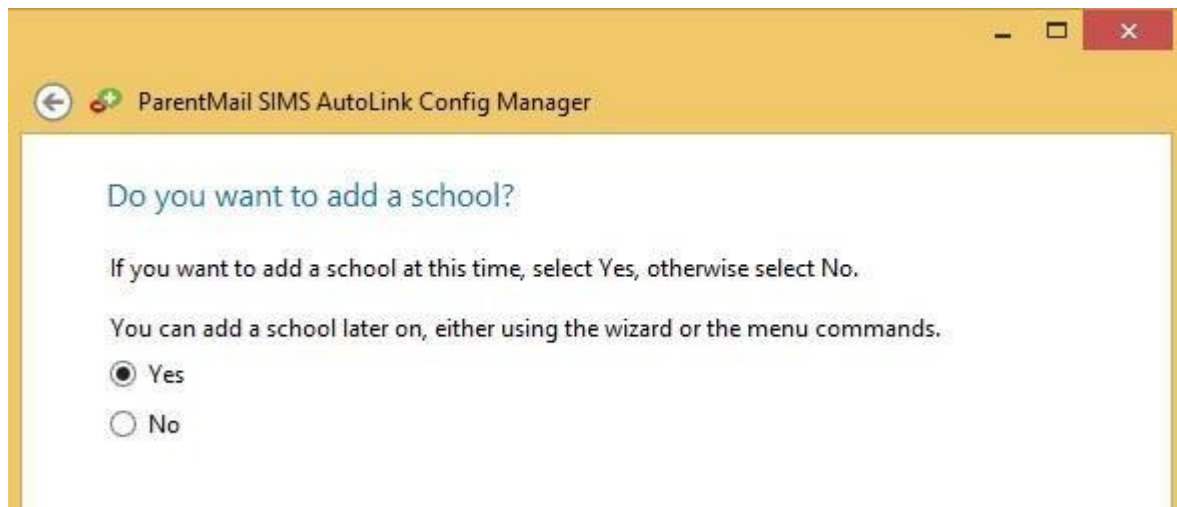
- Click the ... button and locate C:\Program Files\ParentMail\SIMS AutoLink then click next



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

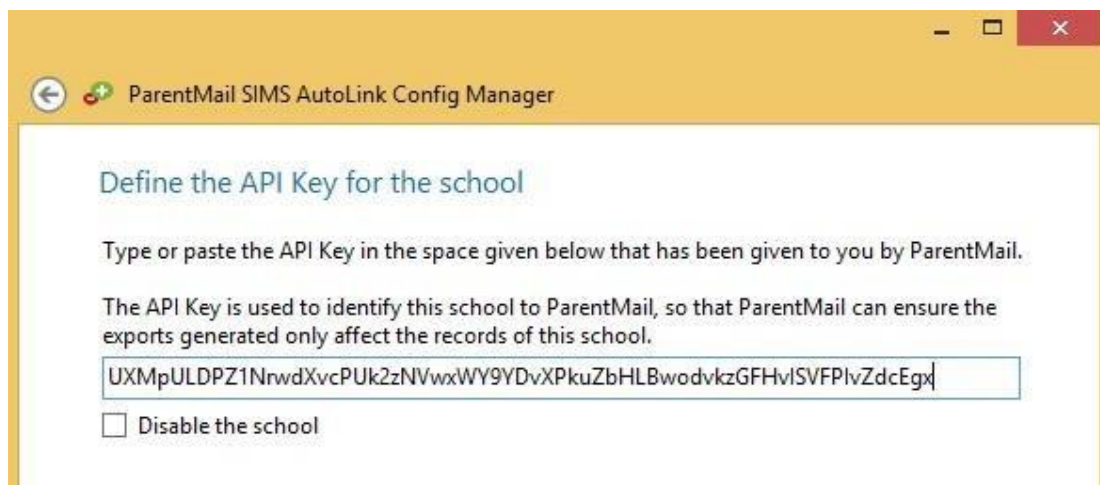


- Select “Yes” to add a new school then click next



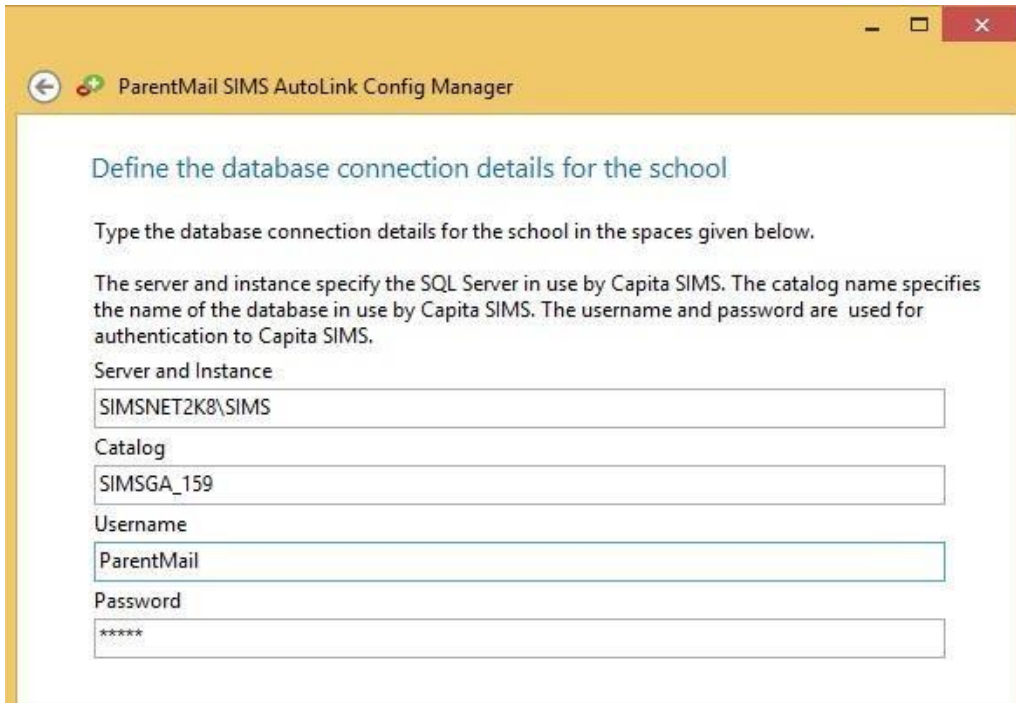
- Enter the API key. To find your API key go to your ParentMail Account > Settings > MIS Link and copy and paste the code from here then click next.

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.



- 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



ParentMail SIMS AutoLink Config Manager

Define the database connection details for the school

Type the database connection details for the school in the spaces given below.

The server and instance specify the SQL Server in use by Capita SIMS. The catalog name specifies the name of the database in use by Capita SIMS. The username and password are used for authentication to Capita SIMS.

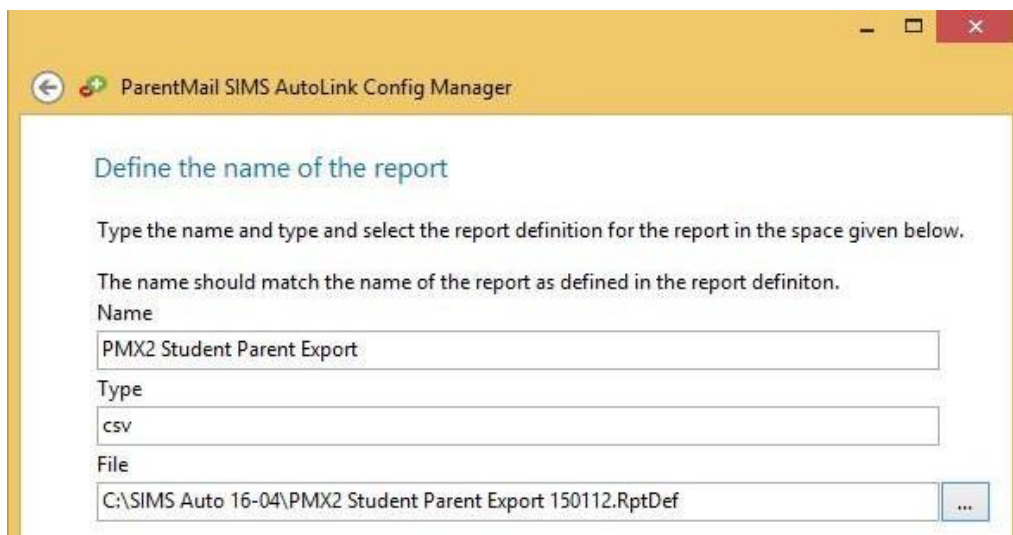
Server and Instance
SIMSNET2K8\SIMS

Catalog
SIMSGA_159

Username
ParentMail

Password

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.



ParentMail SIMS AutoLink Config Manager

Define the name of the report

Type the name and type and select the report definition for the report in the space given below.

The name should match the name of the report as defined in the report definition.

Name
PMX2 Student Parent Export

Type
csv

File
C:\SIMS Auto 16-04\PMX2 Student Parent Export 150112.RptDef

- o Name – Should be one of:
 - PMX2 Student Parent Export
 - PMX2 Staff Export
 - PMX2 Class Teacher Export
 - PMX2 Tutors Export
- o 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



- 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.

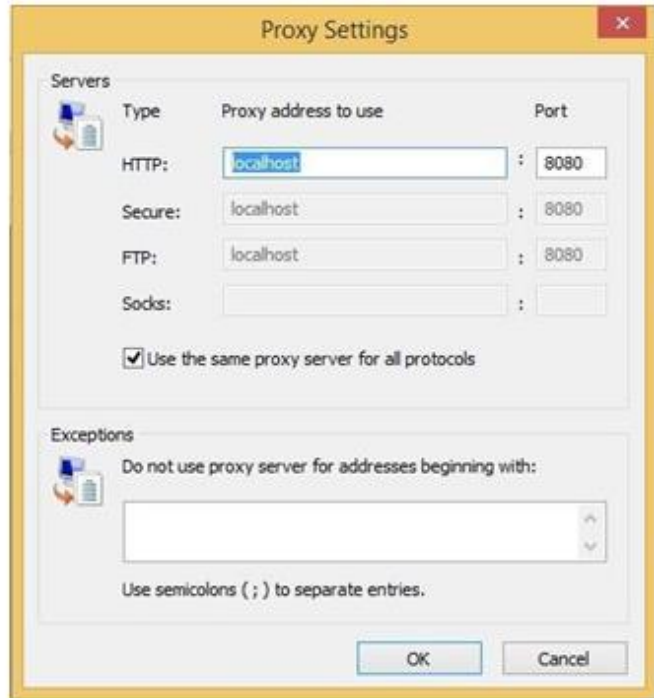
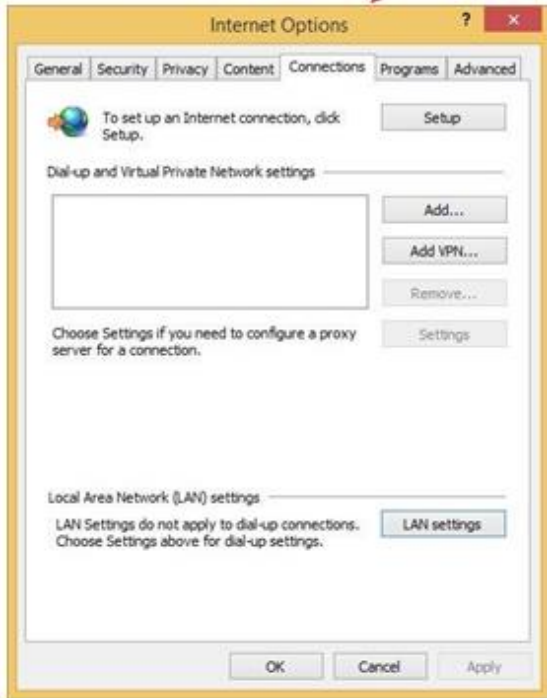
- PMX2 Student Parent Export - 2f07016ca2b646c327020ae97e2d9252
- PMX2 Staff Export - ecdc2d99d90ba8cf982a95b2d3132f5d
- PMX2 Class Teacher Export - 4410e1f9d45349369ba17551e9295ade
- PMX2 Tutors Export - 8eb4b7b2349f18470197168c54d2a0c9

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.

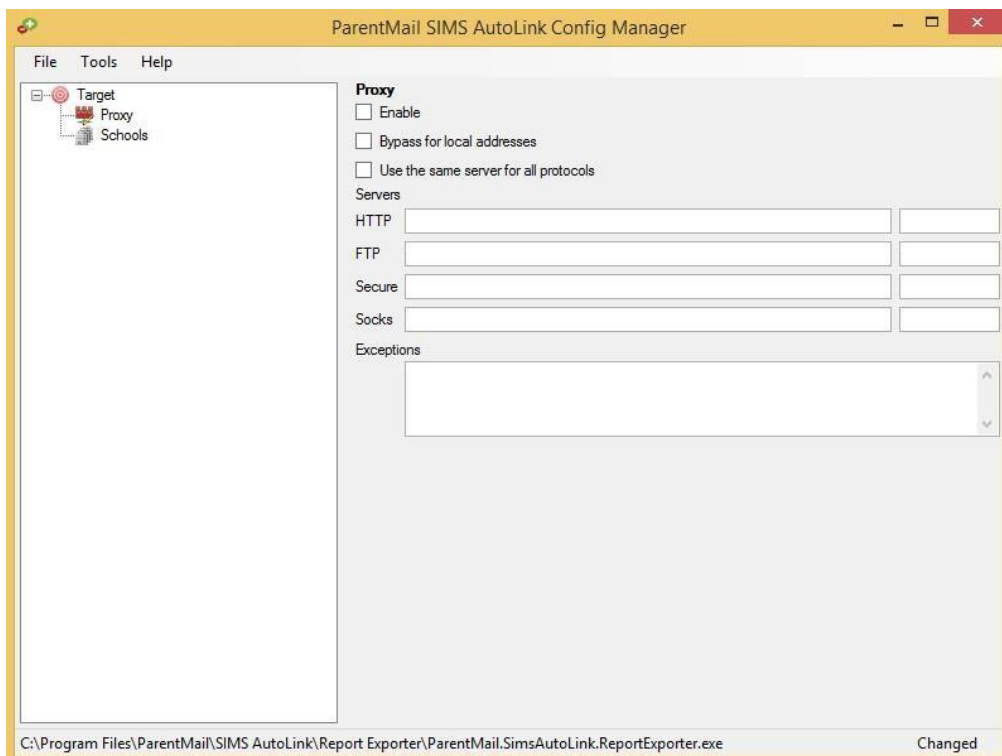
- Repeat the 'Add Report' step for each report definition required for synchronization
- Once you have finished adding reports, you can select the 'No' option when asked if you want to add another report.
- Confirm your configuration in the end step and finish the configuration wizard
- You **MUST** 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

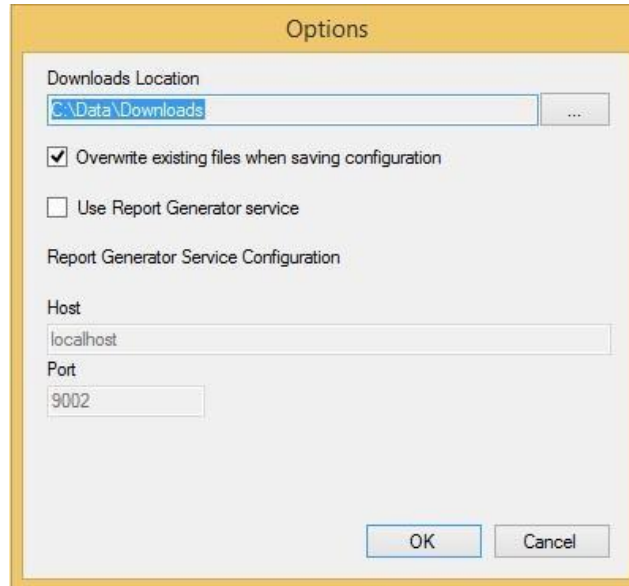
Proxy – If you are using a proxy you will need to configure the ParentMail – SIMS data Auto Sync application with your proxy settings. To check if you have a proxy, please go to Control Panel > Internet Options > Connections > LAN Settings > Advanced and you will be able to see if the proxy server details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



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.

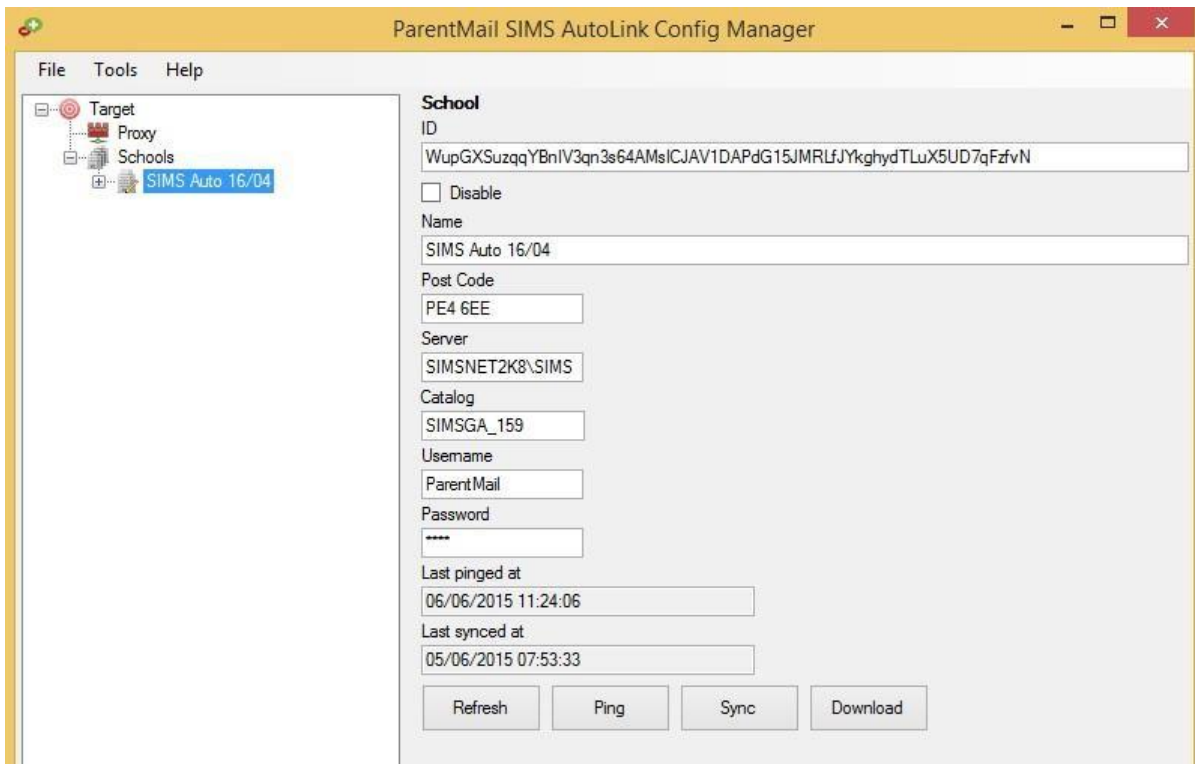


- FireWall – The Auto SIMS data application uses port 9002 by default so your FireWall will need to allow traffic through this port

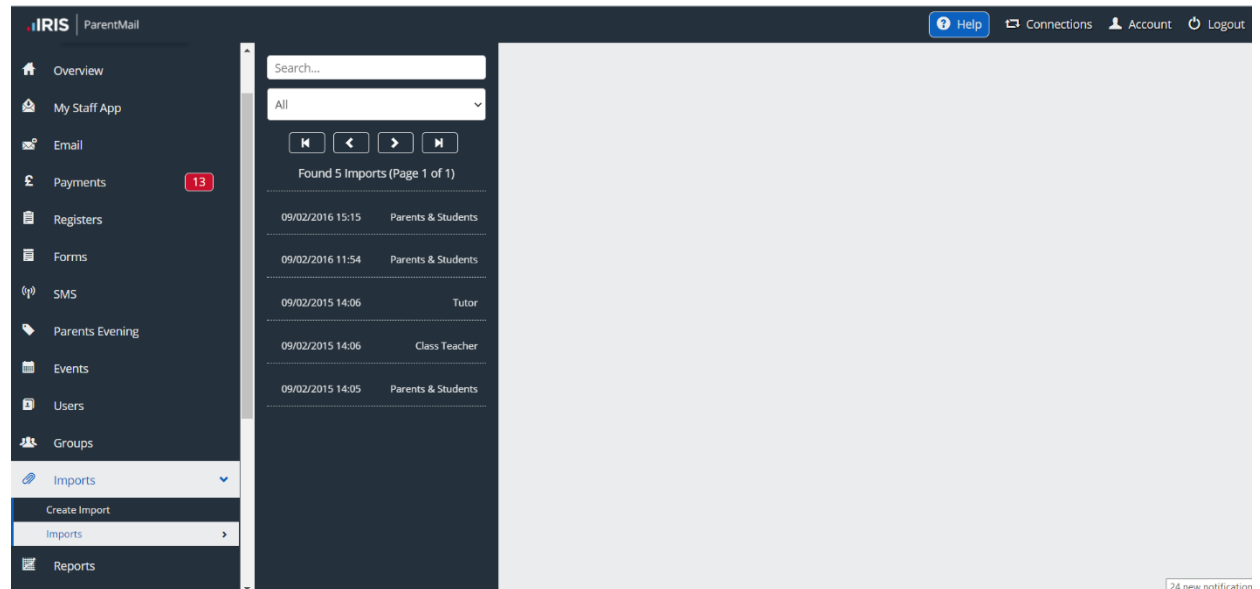


Verify Connectivity and Manual Data synchronisation

- 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.



- 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:

1. 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. [You can download this for free here.](#) 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.
6. 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.