



SIMS

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**SIMS Parent and SIMS
Parent Lite Setup Guide**

Revision History

Version	Change Description	Date
1.0	Initial release.	11/01/2018

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Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

publications@capita.co.uk

Please ensure that you include the module name, version and aspect of documentation on which you are commenting.

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Purpose of this Document

This document is intended for use by the System Administrator, and it provides step-by-step instructions for the setup of SIMS Parent and SIMS Parent Lite.

IMPORTANT NOTE: *Ensure that you read the Which Tasks Should I Complete? section before performing any tasks.*

Once you have completed the setup tasks in this guide, you can then access SIMS Parent or SIMS Parent Lite (<https://parent.sims.co.uk>).

Prerequisites

Please ensure that all of the following prerequisites have been completed or understood before attempting to set up online services.

Step	Action
Minimum technical requirements	Minimum technical requirements for schools and end users are detailed in the Minimum System Requirements document, available on My Account (https://myaccount.capita-cs.co.uk) or on request.
Internet connection	SIMS Parent and SIMS Parent Lite are web-based services that require an internet connection to operate. Please ensure you are connected to the internet when installing and using SIMS Parent or SIMS Parent Lite.
SIMS compatibility	The school <u>must</u> be on the latest version of SIMS.
Browser compatibility	Please ensure that you are using the latest version of Chrome, Firefox or Internet Explorer.

01/ Setup Process

Step	Action
Email junk folder	Please add noreply@sims.co.uk to your email whitelist to ensure that the automatically generated system invite does not go into your junk folder.
Staff sign-in options	Staff who access SIMS Parent or SIMS Parent Lite will need their own unique Microsoft, Office 365, Google, Facebook or Twitter Account. Please ensure that these account details are available when signing into SIMS Parent or SIMS Parent Lite for the first time and thereafter.
SIMS Services Manager	<p>SIMS Services Manager (SSM) manages the link between SIMS and cloud-based SIMS products, e.g. Teacher App, Agora and InTouch.</p> <p>You <u>must</u> upgrade to the most up-to-date version of SSM. Please ensure that SSM has upgraded successfully <u>before</u> attempting to install SIMS Parent or SIMS Parent Lite.</p> <p>SSM operates on the latest versions of Chrome, Firefox, Internet Explorer, Safari and Edge.</p> <p>Please note that if your SIMS server is hosted or managed by your LA or support unit, this step will need to be carried out by them.</p>
SIMS Parent/SIMS Parent Lite Activation Email	You must have access to the SIMS Parent or SIMS Parent Lite activation email to carry out the installation. The email will be sent from noreply@sims.co.uk.
Your SIMS Data	<p>Any parents or students who are required to use the system will need to be listed as current contacts or pupil/students in SIMS.</p> <p>Ensure the user's date of birth is correctly recorded in the school's SIMS system before setting them up with SIMS Parent or SIMS Parent Lite. Their date of birth will be required when the user activates their account.</p> <p>To invite a user to use SIMS Parent or SIMS Parent Lite, they require a valid email address in SIMS. SIMS Parent and SIMS Parent Lite will use the primary email address stored for each member of staff, parent and pupil/student. Ensure that these are available where appropriate.</p>

Which Tasks Should I Complete?

The setup process is dependent on the user's setup. You must follow the tasks from the table that is applicable to you.

I am Setting Up SIMS Parent (Full Version) and I have a SIMS Online Services Product

Task	Description	Completed?
A	Apply the patches using SOLUS (please see <i>Running the Patches with SOLUS</i> on page 4) or dbUpgrade (please see <i>Running the Patches with dbUpgrade</i> on page 4).	<input type="checkbox"/>
D	Set permissions and invite users in School Administration (please see <i>Task D</i> on page 10).	<input type="checkbox"/>

I am Setting Up SIMS Parent (Full Version) and I do not have a SIMS Online Services Product

Task	Description	Completed?
A	Apply the patches using SOLUS (please see <i>Running the Patches with SOLUS</i> on page 4) or dbUpgrade (please see <i>Running the Patches with dbUpgrade</i> on page 4).	<input type="checkbox"/>
B	Join SIMS Online Services (please see <i>Task B</i> on page 6).	<input type="checkbox"/>
C	Manage the Package in SIMS Services Manager (please see <i>Task C</i> on page 8).	<input type="checkbox"/>
D	Set permissions and invite users in School Administration (please see <i>Task D</i> on page 10).	<input type="checkbox"/>

I am Setting Up SIMS Parent Lite and I have a SIMS Online Services Product

Task	Description	Completed?
D	Set permissions and invite users in School Administration (please see <i>Task D</i> on page 10).	<input type="checkbox"/>

I am Setting Up SIMS Parent Lite and I do not have a SIMS Online Services Product

Task	Description	Completed?
B	Join SIMS Online Services (please see <i>Task B</i> on page 6).	<input type="checkbox"/>
C	Manage the Package in SIMS Services Manager (please see <i>Task C</i> on page 8).	<input type="checkbox"/>
D	Set permissions and invite users in School Administration (please see <i>Task D</i> on page 10).	<input type="checkbox"/>

Support

If you have any setup issues, please contact your Local Support Unit.

Task A

Running the Patches with SOLUS

WARNING: Do not complete this step if you are setting up SIMS Parent Lite.

NOTE: Your Local Support Unit might need to authorise the patches before you can deploy.

1. In SOLUS, select **Upgrades | Update Library** to display the **MANAGE UPDATES** page.
2. Select the **Updates** tab.
3. Select the following packages:
 - **SIMS Data Transfer Patch**
 - **SIMS Parent Licence Patch.**
4. Click the **Deploy** button in the bottom right-hand corner to download and deploy the patch.

Running the Patches with dbUpgrade

WARNING: Do not complete this step if you are setting up SIMS Parent Lite.

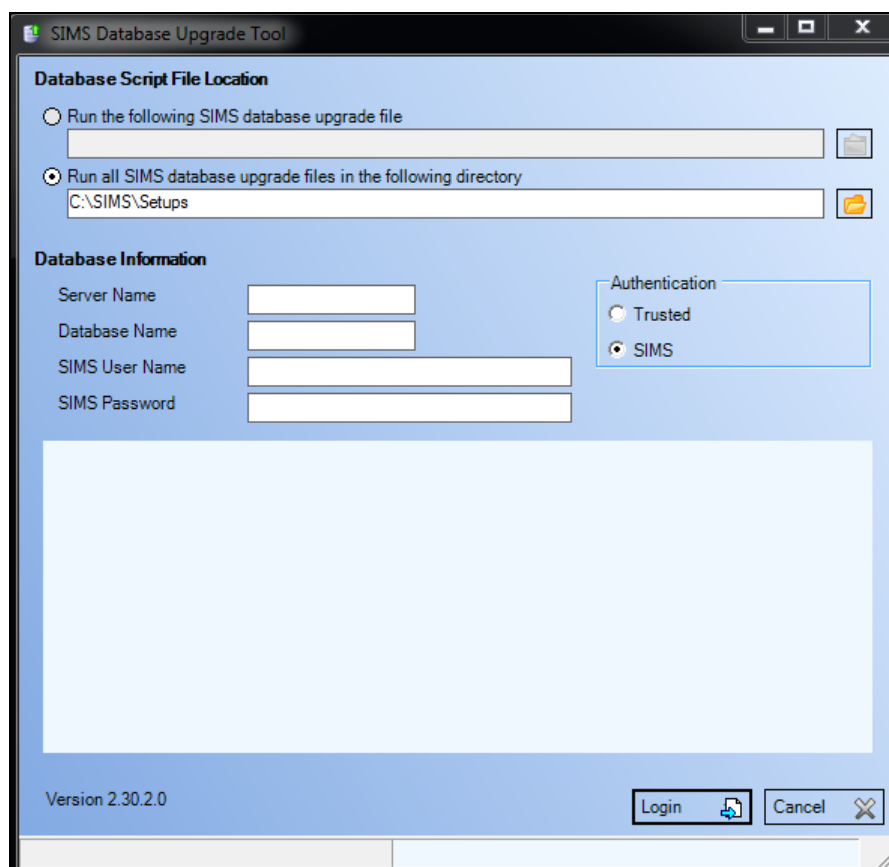
An email will be sent to the Technical Contact from Capita SIMS via noreply@sims.co.uk. The invite email expires after 90 days.

NOTE: If the main contact cannot find the email, they should check their junk email folder. If they still cannot find the email, please log a support case so that the email can be re-sent.

1. Having received the invitation email, you should download the files at the top of the email to a suitable location on the school's server.

IMPORTANT NOTE: Do not unzip the content of the zip file.

- From the desktop, select **Start | All Programs | SIMS Applications | dbUpgrade** to display the **SIMS Database Upgrade Tool**.



- Select the **Run the following SIMS database upgrade file** radio button if the patches are to be run separately or select the **Run all SIMS database upgrade files in the following directory** radio button if the files have been saved away from other files and will be run together.
- Click the **Browse** button adjacent to the selected radio button and navigate to the location of the stored email attachments.
- Select the **Trusted** radio button and complete the **Server Name** and **Database Name** fields.
If these fields do not complete automatically, the **Server Name** and **Database Name** can be found in the `connect.ini` file in the SIMS folder on the SIMS server.
- Click the **Login** button to display a message that confirms the upgrade you are about to perform.
- Click the **Install** button to continue.
- If the patch installation is successful, the **Your database has been updated** message is displayed.

Task B

Joining SIMS Online Services

WARNING: Do *not* complete this step if you have already onboarded with SIMS Online Services. Onboarding is a one-off process.

An email will be sent to the Technical Contact from Capita SIMS via noreply@sim.s.co.uk. The invite email expires after 90 days.

NOTE: If the main contact cannot find the email, they should check their junk email folder. If they still cannot find the email, please log a support case so that the email can be re-sent.

1. Having received an email, you should **click this link** in the email.

You will be able to administer SIMS Online Services by registering within the next 90 days.

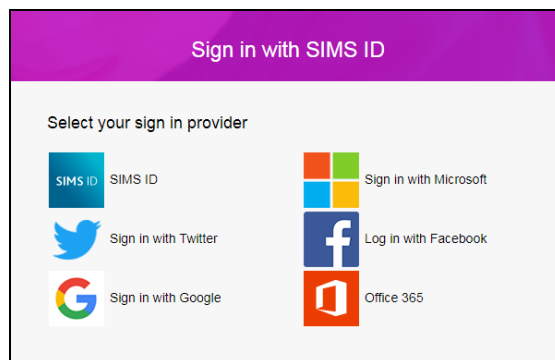
To start the registration process please [click this link](#).

If the link doesn't work then please enter this URL into your browser:

<https://id.sims.co.uk/registration/home/soscode>

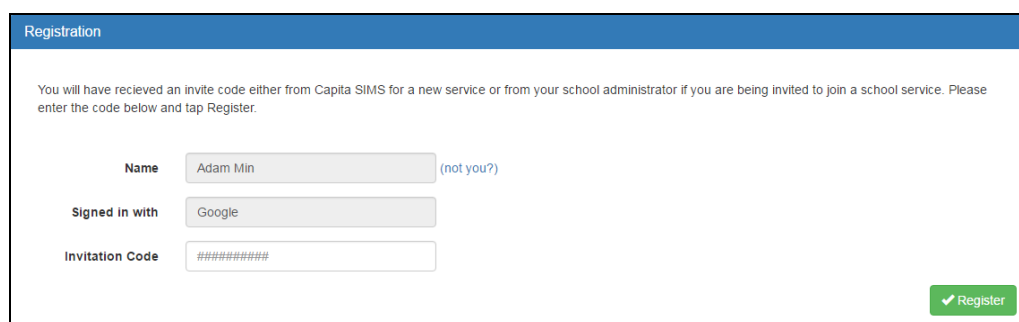
When prompted please enter the following invitation code:
MA2V2d0g2je4G9IAvDc

If this does not work (due to organisational internet restrictions, for example), click the website URL provided. A new internet browser window will open and you will be asked to log in.



2. The Administrator is required to sign in by clicking the relevant account type.
An authorisation page will be displayed.

- Click the **Sign In** or **Accept** button to continue. You will be asked for an invite code.



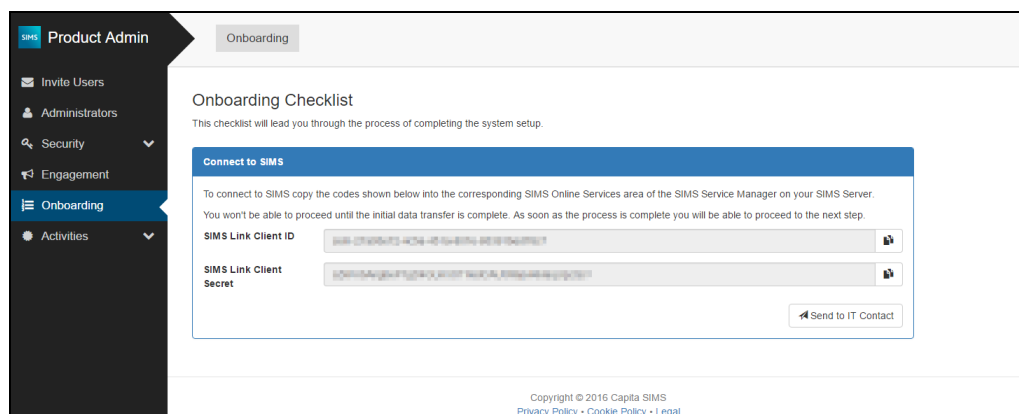
The screenshot shows a 'Registration' form with the following fields:

- Name:** Adam Min (not you?)
- Signed in with:** Google
- Invitation Code:** A field with eight asterisks (#####).
- Register:** A green button with a checkmark icon.

Text above the form: "You will have received an invite code either from Capita SIMS for a new service or from your school administrator if you are being invited to join a school service. Please enter the code below and tap Register."

- If you were able to **click this link** in the email you received, this field will be populated automatically.
 - If you had to select the web address in the email, you will need to copy the invite code from the email and paste it into the space provided.
- Click the **Register** button to continue.

You will be logged in automatically as an Administrator and directed to the **Onboarding Checklist**.



The screenshot shows the 'Onboarding Checklist' page in the 'Product Admin' interface. The main content area is titled 'Onboarding Checklist' and contains a 'Connect to SIMS' section. This section includes instructions and two input fields:

- SIMS Link Client ID:** A text input field containing a long alphanumeric string.
- SIMS Link Client Secret:** A text input field containing a long alphanumeric string.
- Send to IT Contact:** A button with a right-pointing arrow.

Footer text: Copyright © 2016 Capita SIMS. Privacy Policy • Cookie Policy • Legal.

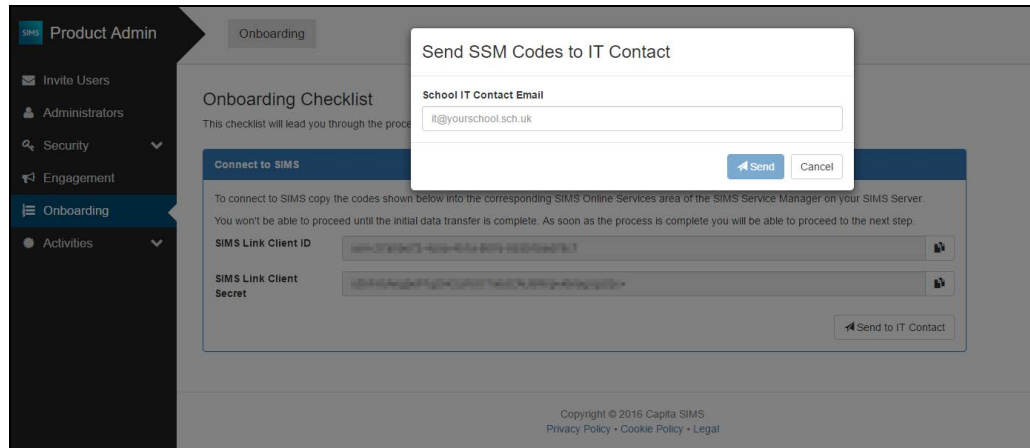
- To continue with the registration and installation process, you must connect your SIMS Parent or SIMS Parent Lite service to your main SIMS system by synchronising the Client ID and Client Secret codes in the school's SIMS Services Manager. This step is required to be completed by your IT contact.

IMPORTANT NOTE: Your IT contact is the person who has access to your SIMS Server and SIMS Services Manager. They might be a staff member at your school, your Local Authority or SIMS Support Unit.

If you are the IT contact, proceed to Task C (please see *Task C* on page 8), where you are required to enter the Client ID and Client Secret in SIMS Services Manager.

If you are not the IT contact, proceed to step 6.

- Send the **SIMS Link Client ID** and the **SIMS Link Client Secret** directly to your school's IT contact by clicking the **Send to IT Contact** button to display the **Send SSM Codes to IT Contact** dialog. These codes are required to be entered into SIMS Services Manager later on.



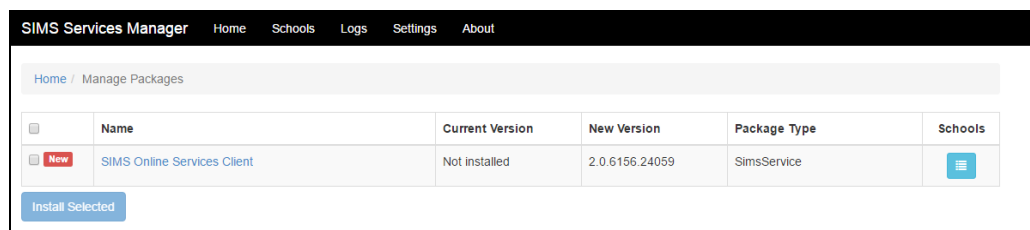
- Enter the **School IT Contact Email** address then click the **Send** button to send the email to your IT contact. Please forward this guide to your school's IT contact so that they can complete Task C.

If you do not wish to use the in-built functionality to send an email to your school's IT contact, this information can be sent manually. To assist with this manual alternative, click the **Copy** button adjacent to the **Client ID** field to copy the content to the clipboard, then paste it into the body of an email. Next, click the **Copy** button adjacent to the **Client Secret** field to copy the content to the clipboard, then paste it into the body of the email. Address the email to your IT contact and send the email.

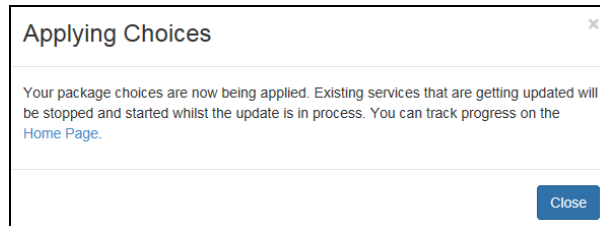
Task C

Managing the Package in SIMS Services Manager

- Open the school's SIMS Services Manager by selecting **Start | All Programs | SIMS Applications | SIMS Services Manager**.
- Click the **Manage Packages** button to display the **Manage Packages** page. The packages should now be displayed.



3. Select the **SIMS Online Services Client** package by selecting the check box and clicking the **Install Selected** button. A notice will be displayed regarding **Applying Choices**.



4. Return to the **Home** page to view whether the package has been applied. If the package is not displayed, continue to refresh. The **Status** will show as **Transitioning** if the page is not refreshed.

Name	Version	Status	Type	Actions
SIMS Online Services Client	2.0.6156.24059	Started	SimsService	<input checked="" type="checkbox"/> ON

5. Open SIMS Services Manager and click the menu icon in the **Actions** column for the **SIMS Online Services Client** package.

Name	Version	Status	Type	Actions
SIMS Online Services Client	2.0.6156.24059	Stopped	SimsService	<input type="checkbox"/> OFF

6. Click the **Configure** icon to display the **Configuration** dialog.



The screenshot shows a configuration dialog box titled "Green Abbey School SIMS Online Services Client". It contains two input fields: "Client ID:" and "Client Secret:". Both fields contain masked text. A blue "Save" button is located at the bottom right of the dialog.

7. Enter your **Client ID** and **Client Secret**. These can be found in either Product Admin via **Security | SIMS Link**, or the **Onboarding** page if you are not yet onboarded with SIMS Online Services.

The data transfer will now take place.

IMPORTANT NOTE: It can take up to an hour to complete the data transfer between SIMS and SIMS Parent. However, this can be manually triggered by switching the package **Off** then **On**.

Task D

Inviting Users and Setting Permissions in School Administration

Users can be invited in School Administration.

1. Navigate to School Administration (<http://admin.sims.co.uk>).
2. Click **Onboarding**, where you will be asked to map yourself to a SIMS user. Highlight your name (i.e. that of the SIMS Parent administrator) in the list of SIMS users and click the **Map Administrator** button.

NOTE: It is strongly recommended that more than one Administrator is chosen. Ensure that you choose your Administrators carefully.

Onboarding Checklist

✓ SIMS Connection Complete

Map Yourself to a SIMS User

As the initial administrator we don't yet know who you are in SIMS. Please tell us who you are and click Map Administrator.

Forename	Surname	Email
Abigail	Buxton	abigail.buxton@example.com
Lynn	Chase	lynn.chase@example.com
Rachel	Cooke	rachel.cooke@example.com
Jane	Coombes	jane.coombes@example.com
Jane	Darby	jane.darby@example.com
Richard	Davidson	richard.davidson@example.com
Geraint	Davies	geraint.davies@example.com
Donna	Daylow	donna.daylow@example.com
Steven	Dumbell	steven.dumbell@example.com
Joan	Edwards	joan.edwards@example.com

Map Administrator

You are now required to sign out and sign in again.

3. Click the **Sign out** button. After signing out, you will be redirected to the site. You will be asked to select your account sign-in option.

NOTE: If you are not redirected to the site, you should sign in again using the correct URL (<https://admin.sims.co.uk>).

SIMS Product Admin

Onboarding

Options Live01 - Google

Manage Users

Administrators

Security

Onboarding

Message Log

Options

Onboarding Checklist

This checklist will lead you through the process of completing the system setup.

✓ SIMS User Mapping Complete

Setup Complete

Your setup is complete. A good next step is to invite users to create accounts.

Invite Users

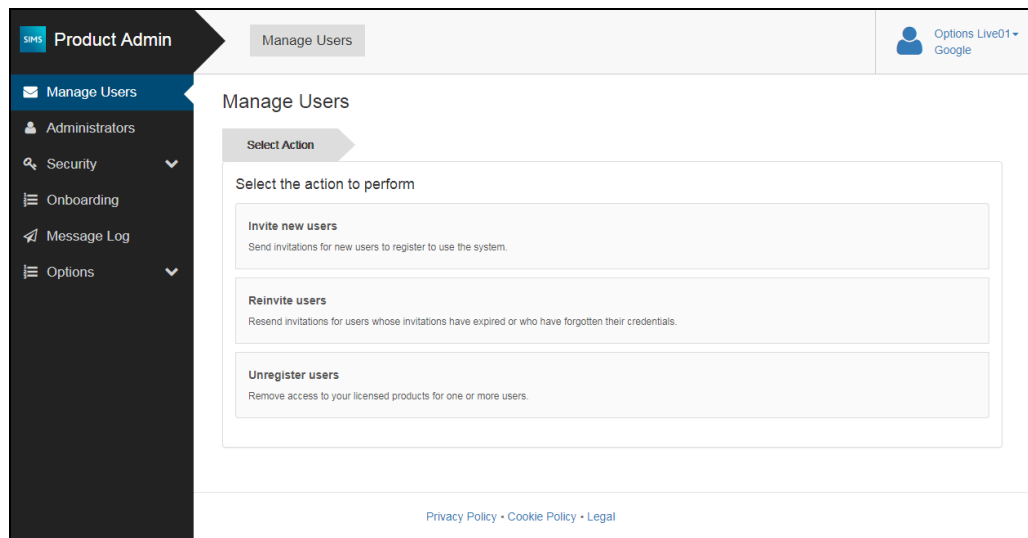
Privacy Policy - Cookie Policy - Legal

4. The **Onboarding Checklist** will confirm that your setup is complete and it will recommend that you apply settings and invite users.

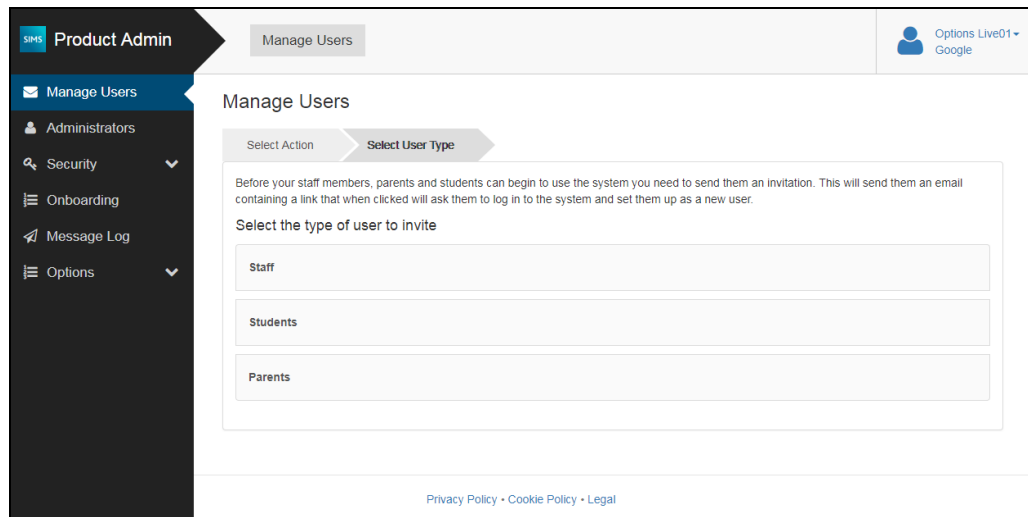
Inviting Users

NOTE: Users require a valid Google, Microsoft, Office 365, Facebook or Twitter account.

1. Administrators can invite administrators or parents by selecting **Manage Users**.



2. Select **Invite new users** to display the **Select User Type** tab.



Select the type of user you want to invite.

The invite process varies depending on the option selected. Follow the on-screen instructions to continue.

3. Select the relevant user(s) then click the **Invite <user type>** button.

NOTE: For security reasons, invites have an expiry date of 90 days.

Users will receive an email that invites them to become users.

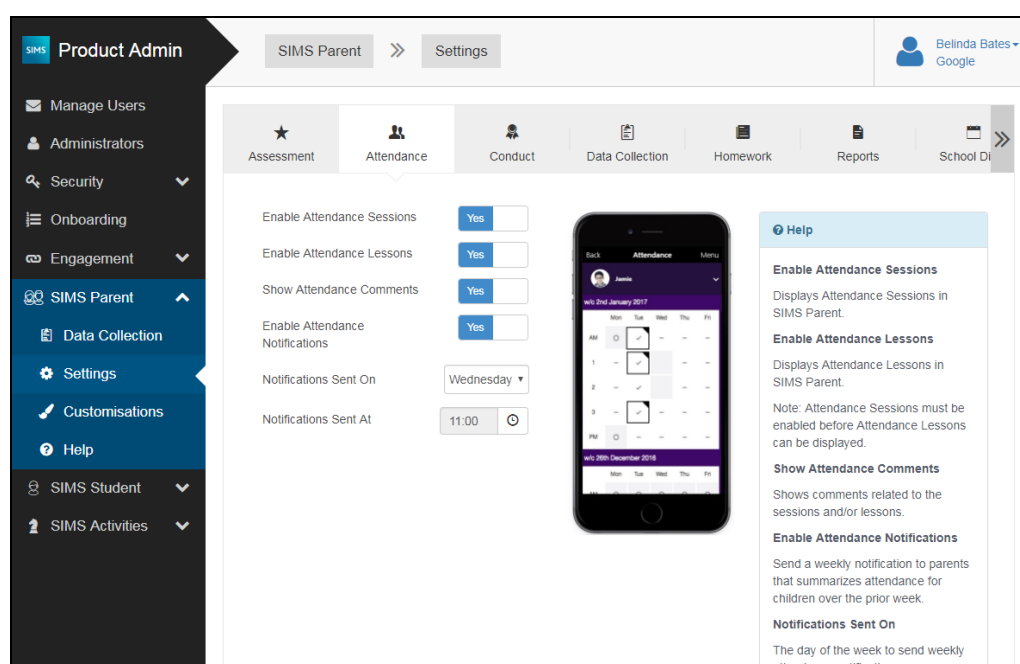
Once you have sent the invite, the name of the recipient is displayed in the **Reinvite users** section (accessed from the **Manage Users** page). Once the recipient has registered successfully, their name is removed from the list and is displayed in the **Unregister users** section. Invites can also be re-sent from here.

Applying Settings

1. Navigate to **SIMS Parent | Settings** to display the **Settings** page.

IMPORTANT NOTE: Only the **Data Collection** tab is enabled for SIMS Parent Lite users.

Each tab (e.g. **Assessment**, **Attendance**, etc.) contains settings that you can toggle on and off.



2. Settings vary on each tab. Toggle settings between **Yes** or **No** to enable or disable them. Select any other required settings. Further information is displayed in the **Help** panel of each tab.
3. Click the **Save** button.

Using the Data Collection Submission Page

The **Data Collection Submission** page in School Administration (<http://admin.sims.co.uk>) enables the user to review the pupil/students who have and have not had their data collection information submitted. Further information is displayed in the **Help** panels on each tab.

1. Navigate to **SIMS Parent | Data Collection** to display the **Data Collection Submission** page.

The screenshot shows the SIMS Parent interface. The left sidebar contains navigation options: Manage Users, Administrators, Security, Onboarding, Engagement, SIMS Parent (selected), Data Collection, Settings, Customisations, Help, SIMS Student, and SIMS Activities. The main content area is titled 'Data Collection Submission' and has two tabs: 'Available' (selected) and 'Unavailable'. The table below shows data for the 'Available' tab.

Forename	Surname	Year Group	Reg Group	Last Submitted	Status
Ben	Abbot	13	H	3 Oct 2017 11:38	Approved
Andrew	Abbot	11	11E	27 Jan 2017 11:37	Approved
Alisha	Abbot	3	3B	21 Nov 2017 11:11	Pending Approval
Liam	Abbot	8	8C	18 Jul 2017 16:22	Approved
Cameron	Able	12	G		Unconfirmed
Keith	Badger	11	11C		Unconfirmed
Linda	Badger	13	L		Unconfirmed
Tomaz	Badger	R	RA		Unconfirmed
Eve	Badger	3	3B		Unconfirmed
David	Badger	8	8B		Unconfirmed

An 'Export as CSV' button is located at the bottom right of the table.

The **Available** tab displays the children of the parents using the app, the date of the last data submission and the status of each review.

2. Clicking the **Unavailable** tab displays the children of parents who have not submitted data collection information.

The screenshot shows the 'Unavailable' tab selected. The table below lists children who have not submitted data collection information.

Forename	Surname	Year Group	Reg Group	Reason
Chris	Aaron	7	7A	View
Sophie	Aaron	7	7A	View
Liz	Aaron	7	7B	View
Graham	Abbess	10	10A	View
Grenetta	Abbey	13	G	View
Sean	Abbey	10	10B	View
Sadie	Abbot	R	RA	View
Tamwar	Abdullah	4	4A	View
Shaquib	Abhra	N2	N2	View
Abjit	Abhra	3	3A	View

An 'Export as CSV' button is located at the bottom right of the table.

Click the relevant **View** button in the **Reason** column to display the **Reason for unavailability** dialog.

Reason for unavailability

Parent Name	Registered	Has Access
Nilesh Abhra	✘	✔
Pari Abhra	✘	✔

? Help

Registered

Whether the parent is registered with SIMS Online Services.

Has Access

Whether the parent satisfies **all** of the following conditions in SIMS:

1. Has parental responsibility with priority 1 or 2 for the child.
2. Lives at the same address as the child.
3. Has no existing court orders associated with the child.

3. Click the **OK** button to return to the **Data Collection Submission** page. Click the **Export as CSV** button on the **Available** or **Unavailable** tab if you want to export the data to Microsoft® Excel.

Accessing the SIMS Parent Service

Once the setup process has been completed successfully, users can access SIMS Parent or SIMS Parent Lite (<https://parent.sims.co.uk>).