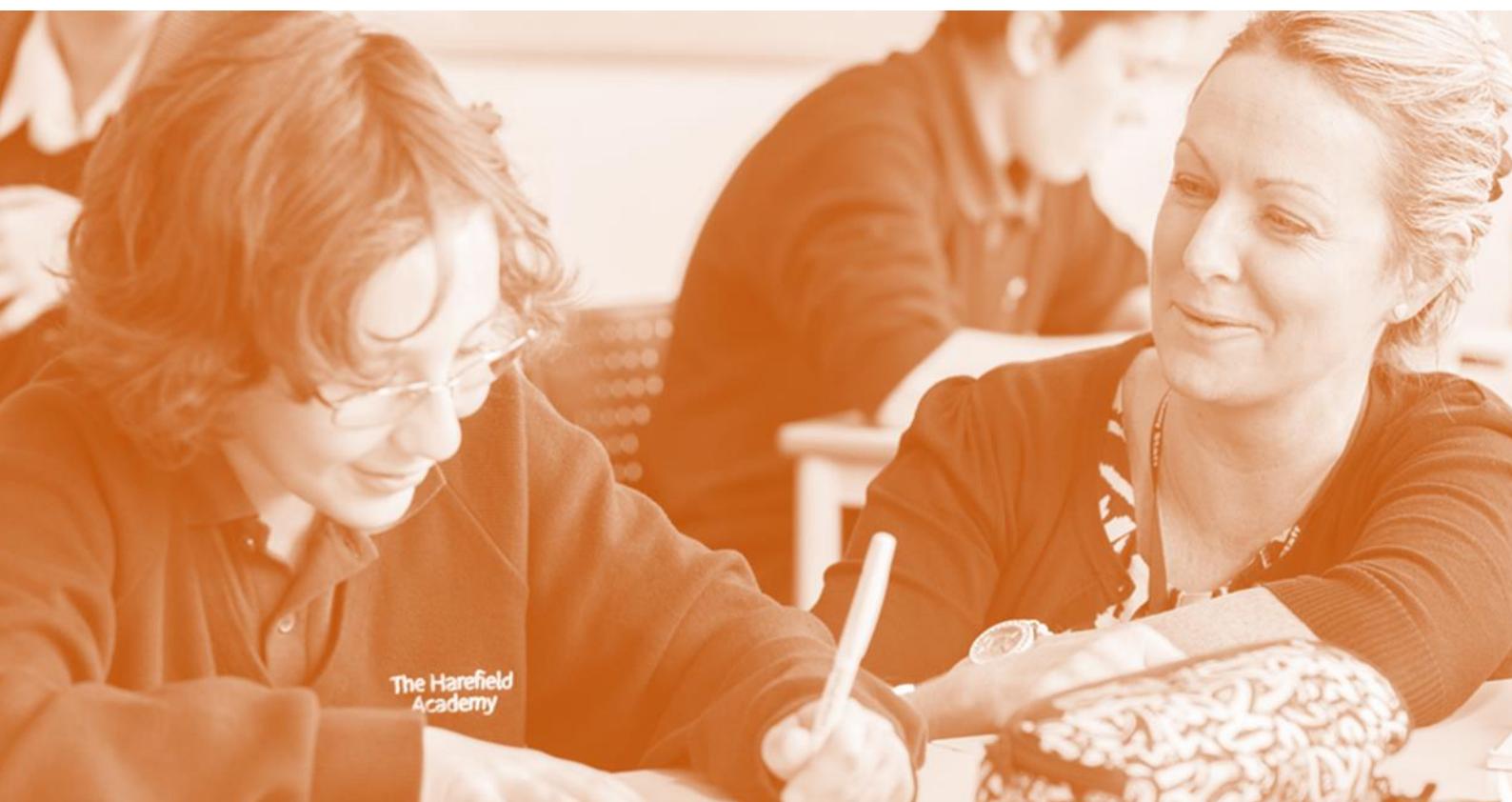


SIMS

helping  
schools  
inspire



# SIMS SchoolView School Connection Guide

Version 2.0

**Version 2.0**

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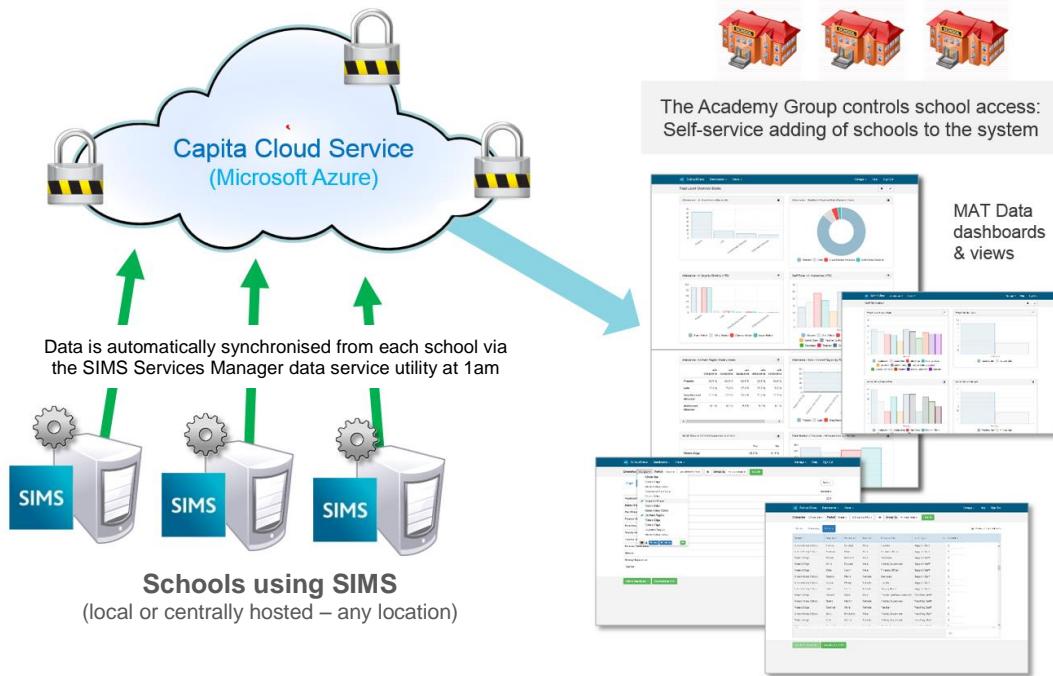
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# Introduction

This guide is intended to provide information on how schools connect to the SIMS SchoolView system if they are part of a multi-academy trust or school group.

To help understand how SIMS SchoolView works, the diagram below summarises the overview process:



## How does the school connect to SchoolView?

- To automatically synchronise data from a school within the group to the organisation's SchoolView system, the organisation first needs to add the school name to their SchoolView system and generate the activation details needed by the school to configure their SIMS system.
- Adding a school within your SchoolView system is easy to do and the multi-academy trust/school group controls which schools using SIMS can connect to their system.
- There are 3 options on how the school can connect their SIMS System to the organisation's SIMS SchoolView system
- If you are applying the patch and configuring the schools SSM utility yourself at the centre you will be up and running in as little as 30 minutes or less per school. If your schools or their SIMS IT support provider need to complete the configuration, this may take longer to complete depending on their availability.

**Option 1: The Academy Trust will configure the school's SIMS system directly – [more details >>](#)**

**Option 2: The Academy Trust will provide the school activation details directly to a SIMS support provider to configure the school's SIMS system – [more details >>](#)**

**Option 3: The Academy Trust will send an invitation email from SchoolView directly to a school contact to allow the school to arrange the configuration of their SIMS system – [more details >>](#)**

## Technical requirements for each Academy/School

For the academies or schools who are part of the Academy Group and who will be synchronising data to the SchoolView system, the following technical pre-requisites are required to be in-place before proceeding with configuration setup process.



**NOTE:** The required technical pre-requisites are detailed on the next page – you should check with your SIMS IT support to ensure the following pre-requisites are fully available and ready for your school.

### Technical requirements for each Academy/School:

<b>1. A SIMS system</b>	<input type="checkbox"/>
<b>2. SIMS Services Manager (SSM) installed</b>	<input type="checkbox"/>
<b>3. Internet access to your SIMS SSM</b>	<input type="checkbox"/>
<b>4. Check the Ports and Firewall connections</b>	<input type="checkbox"/>
<b>5. SIMS SchoolView database patch is installed</b>	<input type="checkbox"/>
<b>6. A Microsoft or Google account</b> (This is only required for connection option 2, in order to access the configuration details for the School's SIMS SSM system)	<input type="checkbox"/>

Further information about these requirements are [provided here](#)

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# Option 1: The Academy Trust will configure the school's SIMS system directly

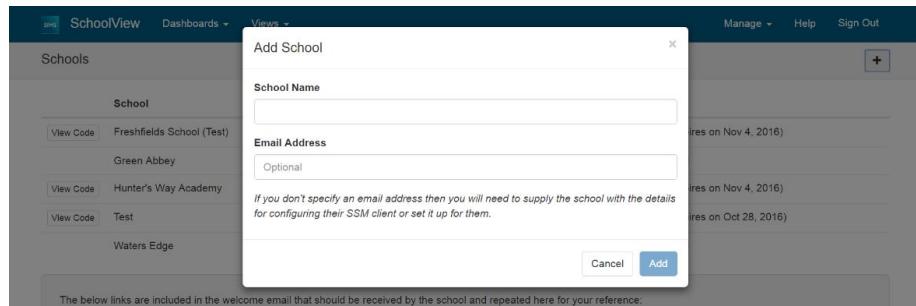
- If the Academy Trust is configuring the access to SchoolView for each school directly (doing it themselves at the centre), there is nothing the school will need to do.
- Once the Trust has completed the necessary configuration, the required SIMS data will synchronise to SchoolView automatically.

## If you are the Academy Trust and configuring the schools yourself –please follow these steps:

If you wish to configure the school(s) yourself to connect to the SchoolView system you will need to add the school name by logging into SchoolView at <https://portal.sims-schoolview.co.uk>, and accessing the

**Manage > Schools** menu option and click on the **+** **Add school** button

- Enter the school name – but leave the Email address blank – then click the **Add** button



- The school will now be listed on the screen – with an **SSM Details** box to the left – as in the example below:

School	Status
Freshfields School (Test)	Invited (expires on Nov 4, 2016)
Green Abbey	Operational
Hunter's Way Academy	Invited (expires on Nov 4, 2016)
<b>SSM Details</b> Kanban Academy	Requires structuring in MAT ( <a href="#">click here</a> ).
Test	Invited (expires on Oct 28, 2016)

## Configuring the school's SIMS Services Manager

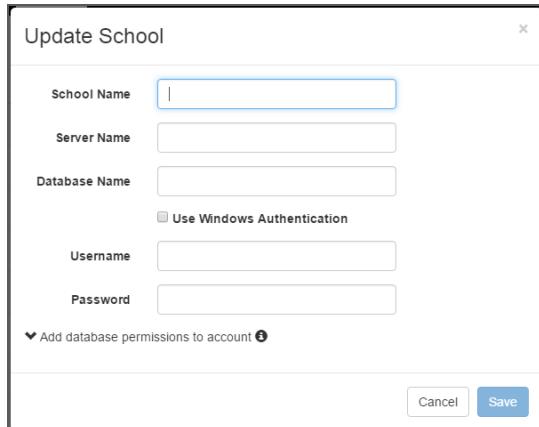
The steps to configure the school's SIMS Services Manager (SSM) are outlined below – it is important that SSM is installed and can connect to the internet, and the SIMS SchoolView database patch has been applied before completing these steps:

### Adding/Editing School Details

If the school is already configured in SSM, go to the **Manage Packages** section on the next page.

1. On the SIMS Server, browse to <http://localhost:50000>, or use the **SIMS Services Manager** desktop shortcut.
2. If the following page is displayed (the **SSM Schools** page), the school has not been configured in SSM. Click the **+** **Add School** button and continue with the following instructions.

- Enter the **School Name**, **Server Name** and **Database Name** and select **Use Windows Authentication**.



Update School

School Name:

Server Name:

Database Name:

Use Windows Authentication

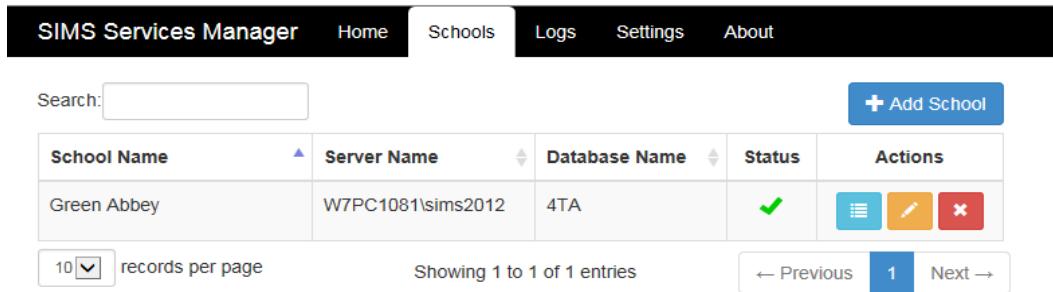
Username:

Password:

Add database permissions to account:

Cancel Save

- Click the **Save** button.



SIMS Services Manager Home Schools Logs Settings About

Search:  + Add School

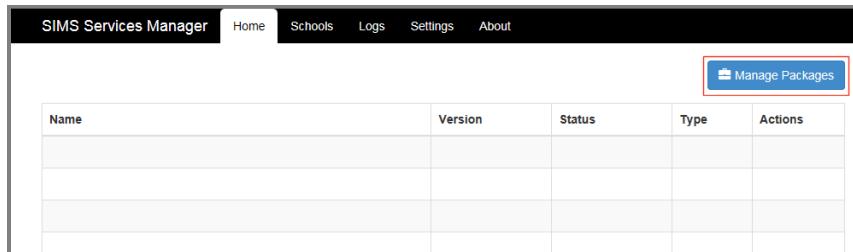
School Name	Server Name	Database Name	Status	Actions
Green Abbey	W7PC1081\sims2012	4TA	✓	

10  Showing 1 to 1 of 1 entries ← Previous 1 Next →

- Click the **Refresh Services** button and confirm that the school has been added
- Click **Home** on the top menu and proceed to **Managing Packages** below

## Managing Packages

- Click the **Manage Packages** button.

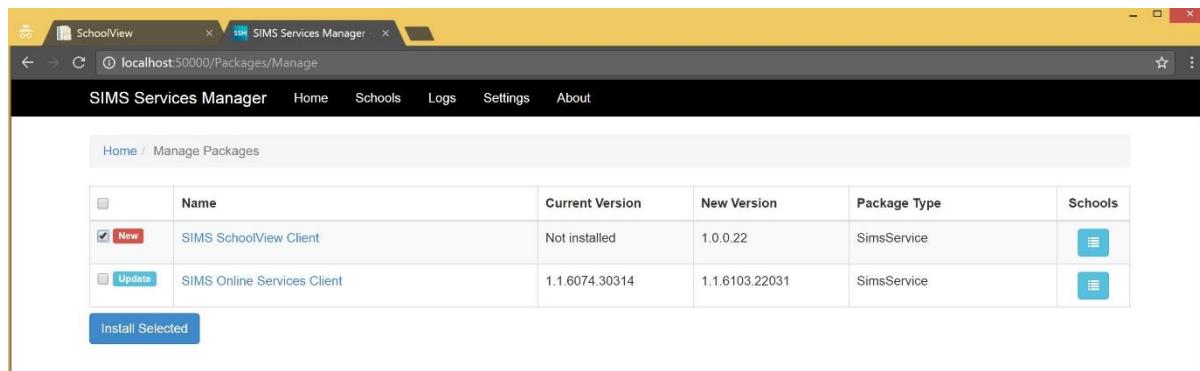


SIMS Services Manager Home Schools Logs Settings About

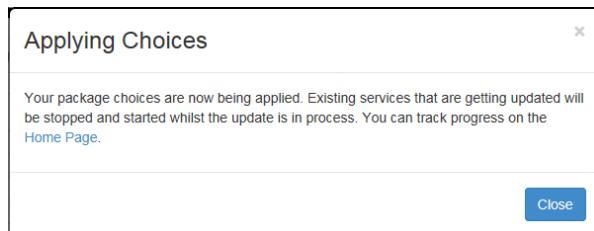
Manage Packages

Name	Version	Status	Type	Actions

- Select the **SIMS SchoolView Client** and click the **Install Selected** button.  
*Tip: If no SIMS SchoolView Client is available after refreshing this screen this usually means that the SIMS SchoolView database patch has not yet been applied to the school's SIMS system.*



- Click the **Close** button on the **Applying Choices** dialog.



- Keep refreshing the page until the package show a status of **Started**.

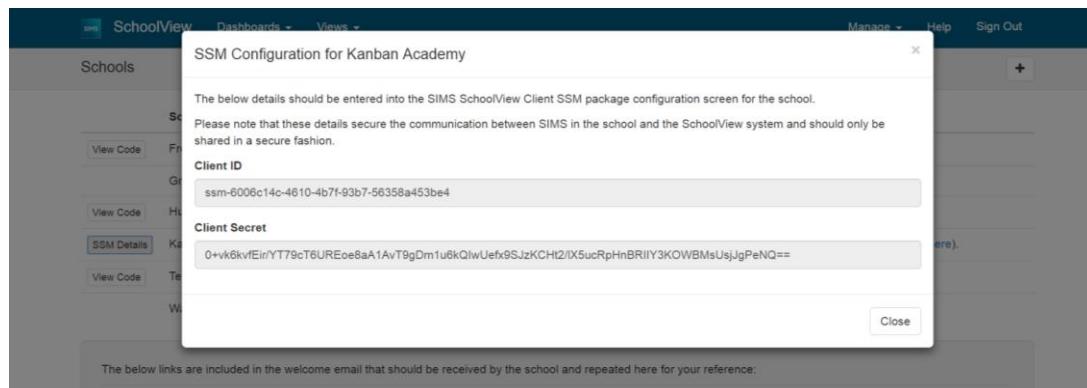
## Enter the School's unique SchoolView connection details

- In the **SchoolView Manage > Schools** screen, select the **SSM Details** button:



School	Status
Freshfields School (Test)	Invited (expires on Nov 4, 2016)
Green Abbey	Operational
Hunter's Way Academy	Invited (expires on Nov 4, 2016)
<b>Kanban Academy</b>	Requires structuring in MAT (click here).
Test	Invited (expires on Oct 28, 2016)

- This will show the **Client ID** and the **Client Secret** details



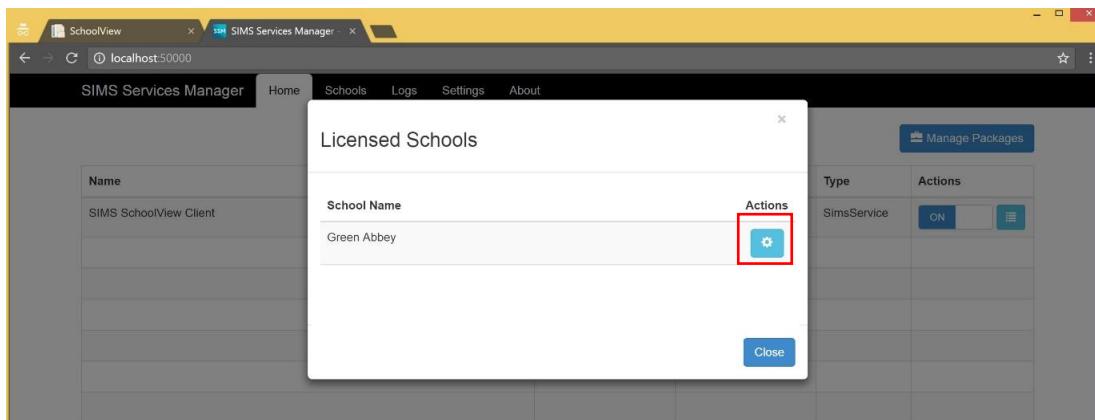
The below details should be entered into the SIMS SchoolView Client SSM package configuration screen for the school. Please note that these details secure the communication between SIMS in the school and the SchoolView system and should only be shared in a secure fashion.

**Client ID**  
ssm-6006c14c-4610-4b7f-93b7-56358a453be4

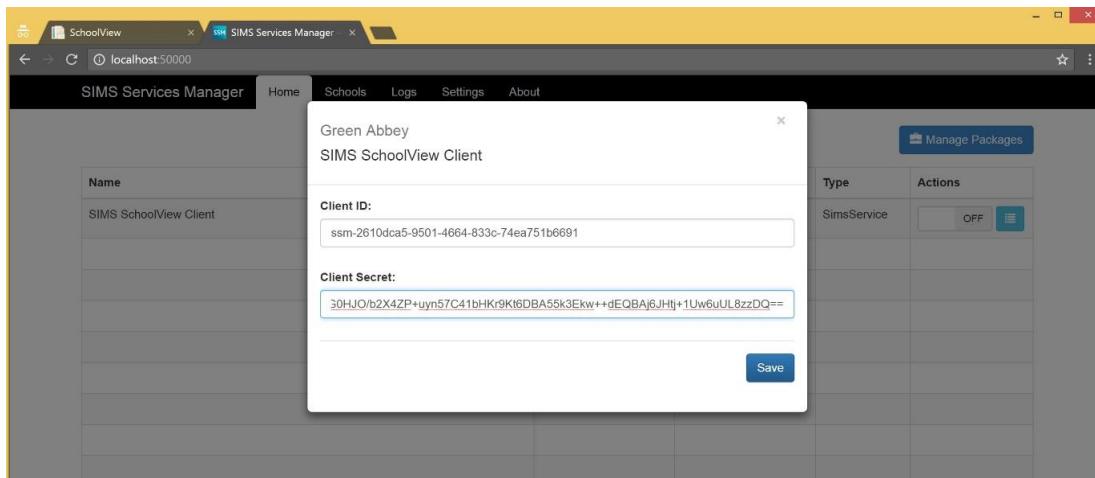
**Client Secret**  
0+vk6kvfEirYT79cT6UREoe8aA1AvT9gDm1u6kQlwUefx9SjzKCh2lX5ucRpHnBRIY3KOWBMsUsJgPeNQ==

The below links are included in the welcome email that should be received by the school and repeated here for your reference:

- Go to the school's SIMS Services Manager and click on the school options button  against the SIMS SchoolView Client – this will show the school name and a cog icon. Click on the **cog icon**



4. Enter the **Client ID** and the **Client Secret** details from the SchoolView screen and click **Save**



5. Return to the SIMS Services Manager (<http://localhost:50000>) console and refresh the page.
3. Verify the package is started.
4. Click **Home** on the **SIMS Services Manager** site.
5. Refresh the SIMS Services Manager services by clicking the **Apply All Changes** on the home page of the SIMS Services Manager.

# Option 2: The Academy Trust will provide the school activation details directly to a SIMS support provider to configure the school's SIMS system

- If the Academy Trust are providing the configuration details directly to a SIMS support provider to complete on behalf of the school(s), there is nothing the school will need to do.
- Once the SIMS support provider has completed the necessary configuration, the required SIMS data will synchronise to SchoolView automatically.

If you are the SIMS support provider who will configure the school's connection to SchoolView please follow the steps outlined below to configure the school's SSM system.

## Step 1: Apply the SchoolView patch to SIMS

Apply a patch to the school's SIMS System. This is available from the following link:  
<https://schoolviewstoragelive.blob.core.windows.net/downloads/schoolviewpatch.zip>

## Step 2 – Configure the school's SIMS Services Manager

The steps to configure the school's SIMS Services Manager (SSM) are outlined below – it is important that SSM is installed and can connect to the internet, and the SIMS SchoolView has been applied before completing these steps:

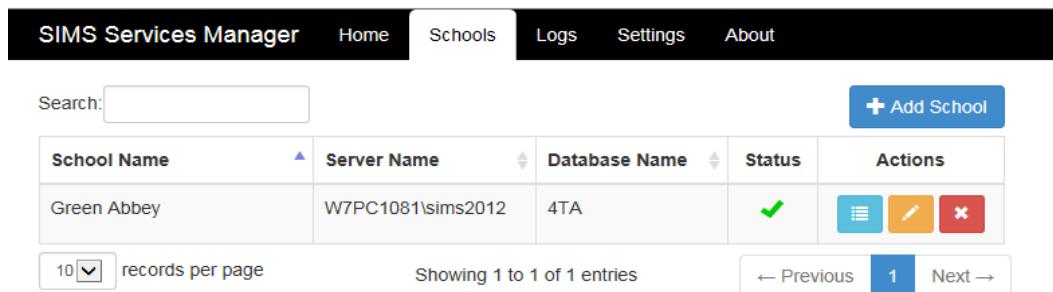
### Adding/Editing School Details

If the school is already configured in SSM, go to the **Manage Packages** section on the next page.

7. On the SIMS Server, browse to <http://localhost:50000>, or use the **SIMS Services Manager** desktop shortcut.
8. If the following page is displayed (the **SSM Schools** page), the school has not been configured in SSM. Click the **+ Add School** button and continue with the following instructions.

9. Enter the **School Name**, **Server Name** and **Database Name** and select **Use Windows Authentication**.

10. Click the **Save** button.



Search:

**+ Add School**

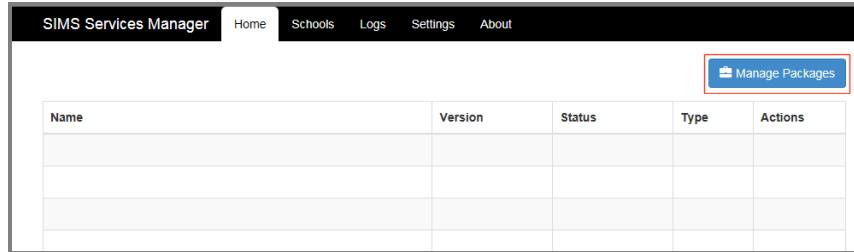
School Name	Server Name	Database Name	Status	Actions
Green Abbey	W7PC1081\sims2012	4TA	✓	

10  Showing 1 to 1 of 1 entries  **1**

11. Click the **Refresh Services** button and confirm that the school has been added
12. Click **Home** on the top menu and proceed to **Managing Packages** below

## Managing Packages

1. Click the **Manage Packages** button.

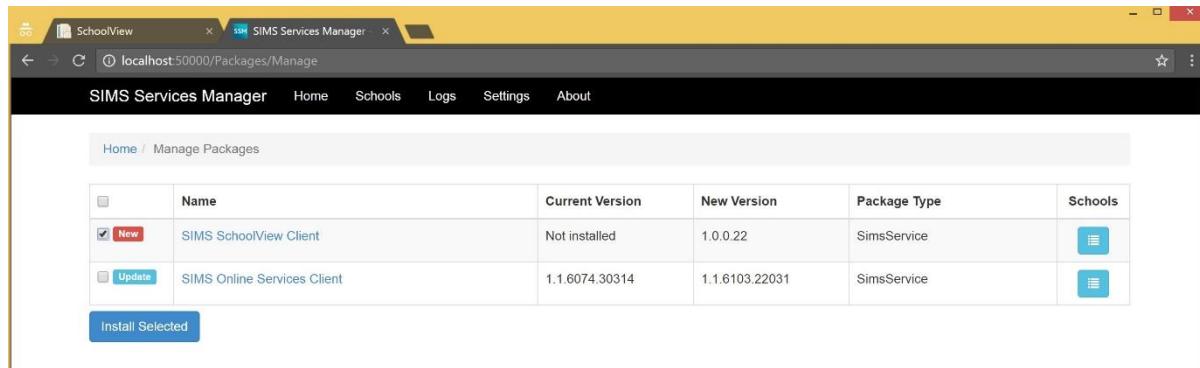


**Manage Packages**

Name	Version	Status	Type	Actions

2. Select the **SIMS SchoolView Client** and click the **Install Selected** button.

*Tip: If no SIMS SchoolView Client is available after refreshing this screen this usually means that the SIMS SchoolView database patch has not yet been applied to the school's SIMS system.*

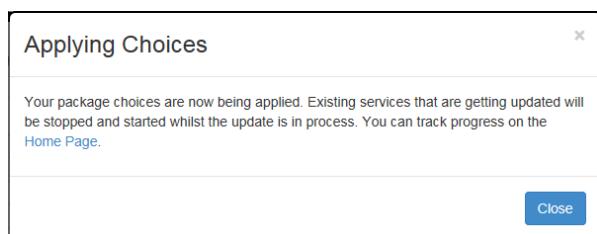


**Manage Packages**

	Name	Current Version	New Version	Package Type	Schools
<input type="checkbox"/>	SIMS SchoolView Client	Not installed	1.0.0.22	SimsService	
<input type="checkbox"/>	SIMS Online Services Client	1.1.6074.30314	1.1.6103.22031	SimsService	

**Install Selected**

3. Click the **Close** button on the **Applying Choices** dialog.



Applying Choices

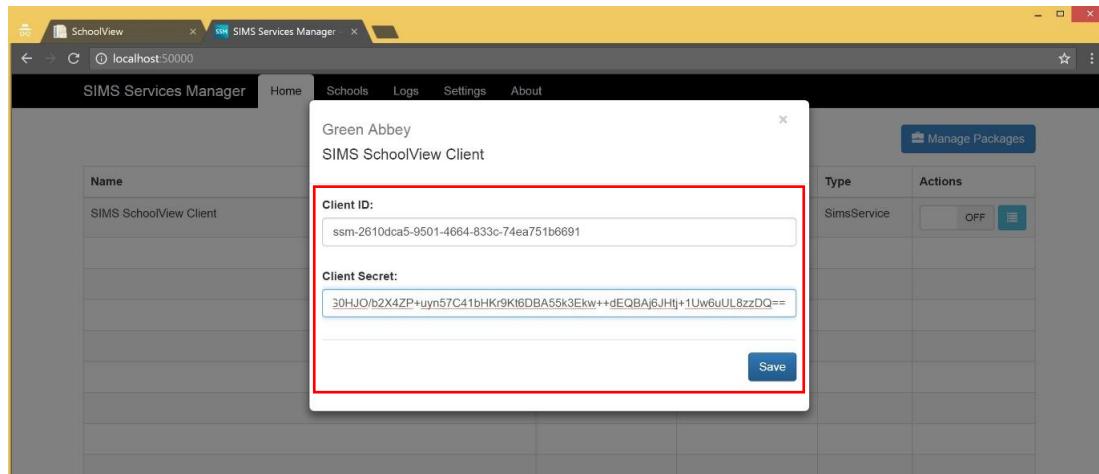
Your package choices are now being applied. Existing services that are getting updated will be stopped and started whilst the update is in process. You can track progress on the [Home Page](#).

**Close**

4. Keep refreshing the page until the package show a status of **Started**.

## Enter the School's unique SchoolView connection details – the Client ID and the Client Secret

1. The Academy Trust should have provided the **Client ID** and the **Client Secret** details for the school.
2. Go to the school's SIMS Services Manager and click on the school options button  against the SIMS SchoolView Client – this will show the school name and a cog icon. Click on the **cog icon**
3. Enter the **Client ID and the Client Secret details** and click **Save**



4. Return to the SIMS Services Manager (<http://localhost:50000>) console and refresh the page.
5. Verify the package is started.
6. Click **Home** on the **SIMS Services Manager** site.
7. Refresh the SIMS Services Manager services screen by clicking the browser refresh or F5 function.



**NOTE:** Please ensure the SIMS SchoolView Client has a status of **ON** within the SIMS Services Manager. It is sometimes helpful to toggle this to **OFF**, and then **ON** to ensure the data transfer starts.

Once the school has successfully applied the database patch and completed the configuration of their SIMS Services manager their SIMS data will automatically populate into the Academy Trust's SchoolView system.

The data should automatically update at 1am every night – there is nothing further the school needs to do.

# Option 3: The Academy Trust will send an invitation email from SchoolView directly to a school contact

- If the Academy Trust chooses this option, the school will receive an email invitation to join their SchoolView system.
- The school contact nominated by the Academy Trust will receive their SchoolView activation details by email. The email will come from '[noreply@sims.co.uk](mailto:noreply@sims.co.uk)' and includes a unique activation link, valid for 30 days.
- There are three steps to get setup with SIMS SchoolView for your school – the setup has been designed to be self-service by the school's SIMS IT support.

If you are the school's SIMS IT support provider who will configure the school's connection to SchoolView please follow the steps outlined below:

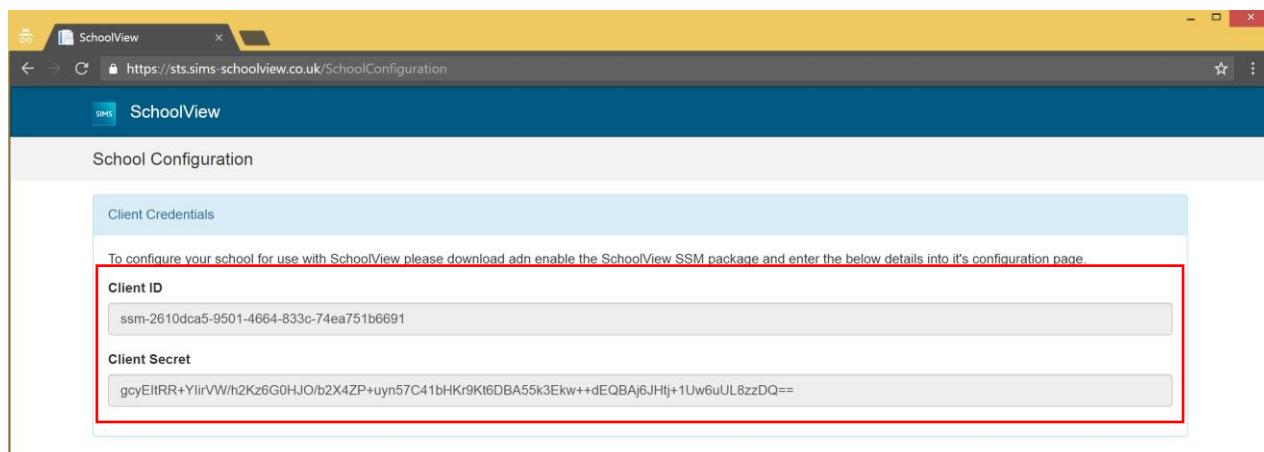
## Step 1: Apply the SchoolView patch to SIMS

Apply the SchoolView patch to the school's SIMS System. This is available from the following link:

<https://schoolviewstoragelive.blob.core.windows.net/downloads/schoolviewpatch.zip>

## Step 2 – get the school's connection details from SchoolView

- Please access the SIMS SchoolView setup site to get your unique SchoolView access information – this is a unique code and a secure information that you will need to enter into the SIMS Services Manager (SSM) on the school's SIMS system.
- To access the SIMS SchoolView setup site please follow the instructions below:
- Before clicking the activation link below, ensure you are fully signed out of any other identity provider in your browser, e.g. Gmail or Hotmail. We recommend that you copy the link and paste it into a private or incognito browser view.
- You will need to use a valid Microsoft or Google account - this account can only be used for a single school.
- Within the **school's activation email**, please use the link provided to access the SchoolView system setup. The link is valid for a period of 30 days from receiving the email.
- The SchoolView system setup page will provide two codes that are needed to configure the school's SIMS Services Manager – you will need the **Client ID** and the **Client Secret** details:



### Step 3: enter the school's connection details in the school's SIMS Services Manager (SSM)

Once you have successfully logged in to the SIMS SchoolView system setup site, you will be able to access the school's **Client ID** and the **Client Secret** details.

Please use these two pieces of information and enter these into the SIMS Services Manager (SSM) on the school's SIMS system.

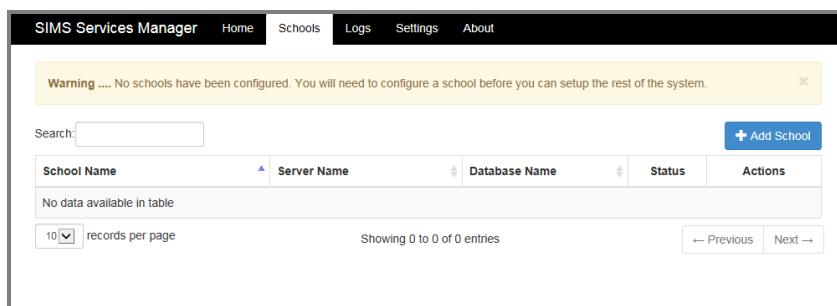
#### Configuring the school's SIMS Services Manager

The steps to configure the school's SIMS Services Manager (SSM) are outlined below – it is important that SSM is installed and can connect to the internet, and SIMS SchoolView database patch has been applied before completing these steps:

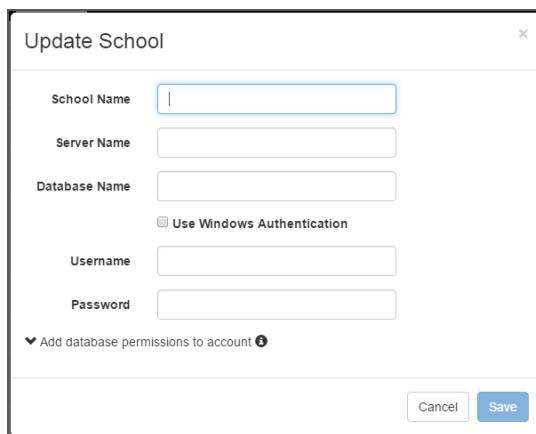
#### Adding/Editing School Details

If the school is already configured in SSM, go to the **Manage Packages** section on the next page.

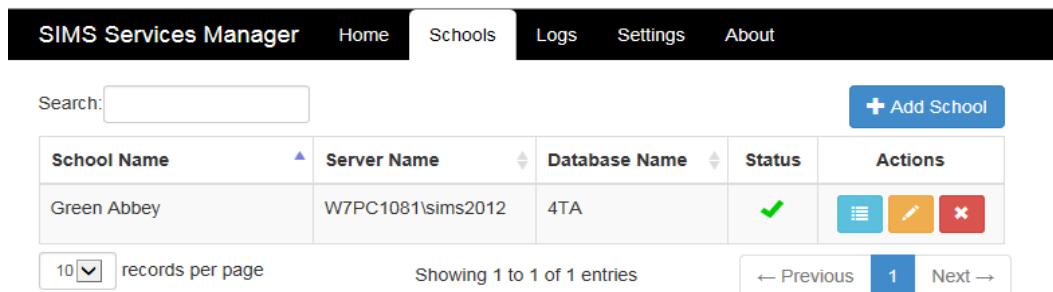
13. On the SIMS Server, browse to <http://localhost:50000>, or use the **SIMS Services Manager** desktop shortcut.
14. If the following page is displayed (the **SSM Schools** page), the school has not been configured in SSM. Click the **+ Add School** button and continue with the following instructions.



15. Enter the **School Name**, **Server Name** and **Database Name** and select **Use Windows Authentication**.



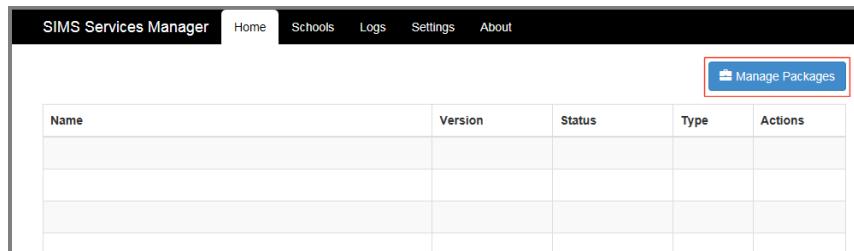
16. Click the **Save** button.



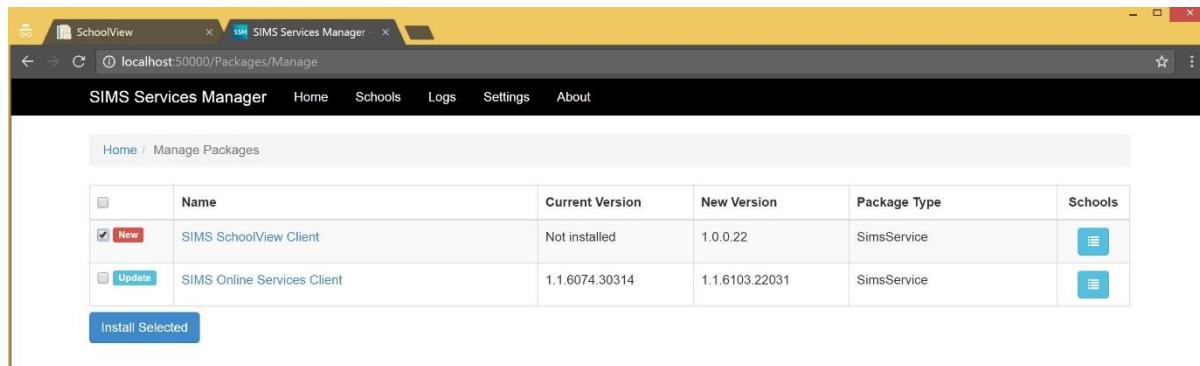
17. Click the **Refresh Services** button and confirm that the school has been added
18. Click **Home** on the top menu and proceed to **Managing Packages** below

## Managing Packages

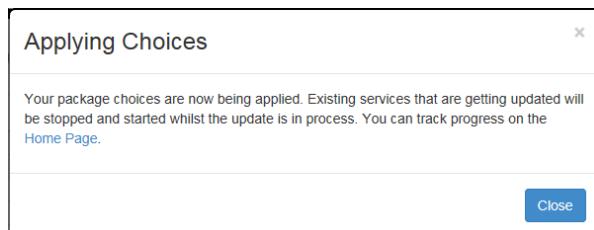
5. Click the **Manage Packages** button.



6. Select the **SIMS SchoolView Client** and click the **Install Selected** button.  
*Tip: If no SIMS SchoolView Client is available after refreshing this screen this usually means that the SIMS SchoolView database patch has not yet been applied to the school's SIMS system.*



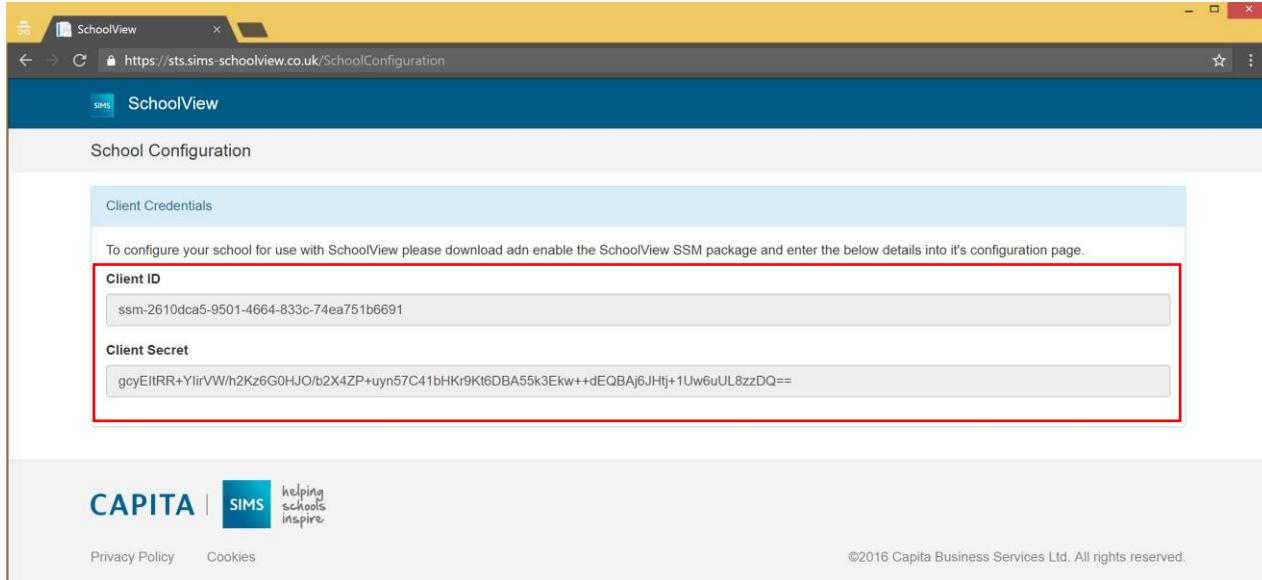
7. Click the **Close** button on the **Applying Choices** dialog.



8. Keep refreshing the page until the package show a status of **Started**.

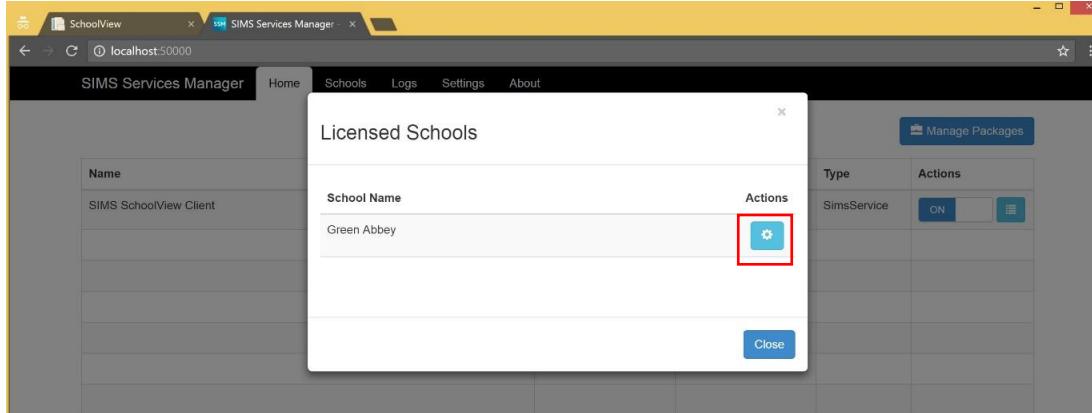
## Enter the School's unique SchoolView connection details – the Client ID and the Client Secret

5. From the In the **SchoolView system setup** screen you logged into, your will need the **Client ID** and the **Client Secret** details:



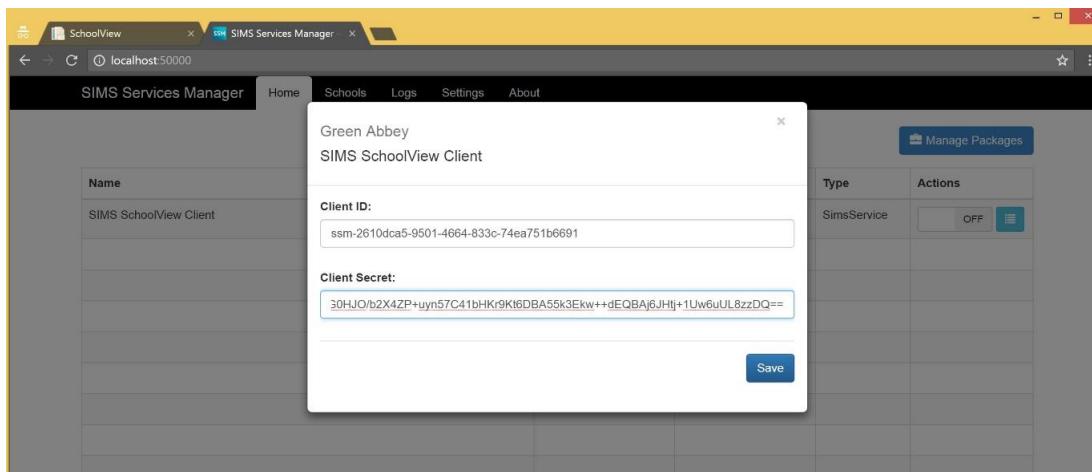
The screenshot shows the 'School Configuration' page of the SchoolView system. Under 'Client Credentials', there are two fields: 'Client ID' containing 'ssm-2610dca5-9501-4664-833c-74ea751b6691' and 'Client Secret' containing 'gcyElRR+YiirVW/h2Kz6G0HJO/b2X4ZP+uyn57C41bHKr9Kt6DBA55k3Ekw++dEQBAj6JHtj+1Uw6uUL8zzDQ=='. Both fields are highlighted with a red box.

6. Go to the school's SIMS Services Manger and click on the school options button  against the SIMS SchoolView Client – this will show the school name and a cog icon. Click on the **cog icon**



The screenshot shows the 'SIMS Services Manager' interface with a 'Licensed Schools' dialog box. The dialog lists 'School Name' as 'Green Abbey' and has an 'Actions' column with a cog icon. The cog icon is highlighted with a red box.

7. Enter the **Client ID** and the **Client Secret** details from the SchoolView screen and click **Save**



The screenshot shows the 'SIMS Services Manager' interface with an 'Edit School' dialog box. The dialog contains 'Client ID' (ssm-2610dca5-9501-4664-833c-74ea751b6691) and 'Client Secret' (30HJO/b2X4ZP+uyn57C41bHKr9Kt6DBA55k3Ekw++dEQBAj6JHtj+1Uw6uUL8zzDQ==). The 'Save' button is highlighted with a red box.

8. Return to the SIMS Services Manager (<http://localhost:50000>) console and refresh the page.
9. Verify the package is started.
10. Click **Home** on the **SIMS Services Manager** site.
11. Refresh the SIMS Services Manager services screen by clicking the browser refresh or F5 function.



**NOTE:** Please ensure the SIMS SchoolView Client has a status of **ON** within the SIMS Services Manager. It is sometimes helpful to toggle this to **OFF**, and then **ON** to ensure the data transfer starts.

Once the school has successfully applied the database patch and completed the configuration of their SIMS Services manager their SIMS data will automatically populate into the Academy Trust's SchoolView system.

The data should automatically update at 1am every night – there is nothing further the school needs to do.

# Appendix: Technical requirements for each Academy/School

For the academies or schools who are part of the Academy Group and who will be synchronising data to the SchoolView system, the following technical pre-requisites are required to be in-place before proceeding with configuration setup process.



**NOTE:** You should check with your SIMS IT support to ensure the following pre-requisites are fully available and ready for your school.

<b>1. A SIMS system</b>	<input type="checkbox"/>
<b>2. SIMS Services Manager (SSM) installed</b>	<input type="checkbox"/>
<b>3. Internet access to your SIMS SSM</b>	<input type="checkbox"/>
<b>4. Check the Ports and Firewall connections</b>	<input type="checkbox"/>
<b>5. SIMS SchoolView database patch installed</b>	<input type="checkbox"/>
<b>6. A Microsoft or Google account</b> (This is only required to access the configuration details for your SIMS SSM system)	<input type="checkbox"/>

Further information about these requirements are provided below:

## A SIMS system

- The SIMS server must meet the Capita Children's Services recommended specification, available from the My Account portal (<https://myaccount.capita-cs.co.uk/login/>).
- .NET Framework 4.5.2 (Full Profile) is required on the server hosting the service.

## SIMS Services Manager installed and configured

The SIMS SchoolView service utilises the SIMS Services Manager (SSM) to provide the data-interoperability element of the service. The SIMS Services Manager provides the link between the school's SIMS system and the SIMS SchoolView service.

The SIMS Services Manager should be installed and configured on the school's SIMS system to enable the connection to the SchoolView system as part of the configuration and setup process.

## Internet Connectivity

For the data synchronisation between the school's SIMS system and the SIMS SchoolView service, an internet connection is required. The internet connection must be available to the SIMS Services Manager connected to the school's SIMS system.

## Ports and Firewall connections

In order to make sure that the SchoolView system can successfully communicate across your school network, it is important to check that the necessary connections are open to allow the SchoolView system to send and receive information to the school's SIMS system.

The following pre-requisites are required to ensure successful data synchronisation to the SchoolView system:

- **Outbound connections on port 443 (SSL) and 80 must be enabled to allow internet access to the school's SIMS Services Manager**

The following sites should be allowed through any firewall/web-filtering in use by the school:

- \*.sims-schoolview.co.uk
- schoolviewuploadlive.blob.core.windows.net

## SchoolView database patch

For Academies or schools who will be synchronising data to the SchoolView system, the **SIMS database patch** must be installed on **each school's SIMS system** before proceeding with any configuration setup. The patch can be downloaded from the following SIMS location and installed via dB upgrade, or is available from SOLUS for SIMS support teams.

### SIMS SchoolView database patch for schools:

<https://schoolviewstoragelive.blob.core.windows.net/downloads/schoolviewpatch.zip>

## Microsoft or Google account

(only needed to access the configuration details for your SIMS SSM system)

- As part of the setup process for each academy/school, the SchoolView system will generate two unique codes for each school. These codes are needed to configure the school's SIMS Services Manager to allow the required data to synchronise with the Academy Trust's SchoolView system.
- The two unique codes for the school are available from the SchoolView system and can be accessed from a URL link that is contained within an email sent to the school.
- The URL link will access the SchoolView system where the codes can be copied to use within the school's SIMS Services Manager.
- To access the SchoolView system the user will require either a valid Microsoft or Google account.
- The system does not require any additional information from your Microsoft or Google account, only what is needed for authentication and to access this page.

# Troubleshooting

You can use this section to help you identify and resolve basic problems you may be experiencing with getting your school connected to SIMS SchoolView.

If your issue is more detailed and has not been covered here, please check the available knowledge base articles available via My Account.

If you cannot resolve your issue, please contact your trust/school group SchoolView contact for further help.

## What is the SIMS Services Manager (SSM)?

SchoolView utilises the SIMS Services Manager to provide the data-interoperability element of the service. The SIMS Services Manager provides the link between the SchoolView system and the school's SIMS system.

The SIMS Services Manager has been designed to help provide a unified data transport service for hosted SIMS products to ensure they require minimal setup, configuration and involvement from the school or SIMS support team.

The SIMS Services Manager requires .NET framework 4.5.2 but otherwise has the same pre-requisites as a SIMS Server on the SIMS technical roadmap.

Centrally hosted environments can use the SIMS Services Manager user interface as above to setup all of the connection and school information per site. Alternately, the support team can edit the settings.xml file located in the \ProgramData\SIMS\SIMS Services Manager. This is recommended if there are multiple sites to manage.

Further information about the SIMS Services manager is available through the SIMS My Account portal.

## How do I apply the SIMS SchoolView database patch to my school's SIMS system?

To apply patches to your SIMS system we recommend using a utility called dbUpgrade

Please download and extract the ZIP folder.

**Important Note: We recommend applying patches or upgrades at a time when no SIMS users are logged in to your school's SIMS system.**

1. Extract all of the patch files from the file you were sent (onto your Desktop, for example) - please extract this to produce three files

2. Run dbUpgrade. This is located in either:

Start > All Programs > SIMS Applications > dbUpgrade

or:

C:\Program Files\SIMS\SIMS .net\DBupgrade.exe (on workstation)

C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn\DBupgrade.exe (on SIMS SQL server)

3. Select 'Run the following SIMS database upgrade file' and specify the path to the location of where the patch file (.zip) is.

Point this where the .Patch.ZIP file is.

4. Enter the SIMS connection and login details:

- For the 'Server Name' field, please enter the SIMS Server name and the SQL Instance the database is hosted on, e.g. MyServer\SIMS2008.

- Enter the name of your SIMS .net database into the 'Database Name' field.

- And then login with a SIMS username and password or you can use the SQL SA user account.

Click 'Login' once these details have been entered.

**Important Note:** If advised to run the patch as the SA user please specify SA as the SIMS Username and enter your SA password.

5. The patch should now show in the list, which then if you click install, this will apply the patch against the specified database.

Depending on what is being applied, this can take some time to complete and the dbUpgrade window may become unresponsive during this time. It would be strongly recommended that this window is left open until it has finished.

### **I can't see the SchoolView data package in the school's SIMS Services Manager (SSM)**

This usually indicates that the SchoolView database patch has not been applied to the school's SIMS system.

Once this has been done you should be able to see the SchoolView data package.