SIMS

Data eXchange (DeX) Setup Guide

Handbook

Revision History

Version	Change Description	Date
1.0	Initial release.	15/12/2021

Doc Ref: DeXInstall/HBK/151221/CE

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:

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

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01 | Setup Process

Purpose of this Document

This guide provides an overview of the Data eXchange (DeX) setup process.

DeX makes it simpler for your Third Party cloud-based applications to interact with your SIMS 7 data, making it easier to work across multiple products within your school and keeping you in control of your data and where it goes.

ESS has extended our existing secure technologies to standardise and centralise the data download and upload process so that we can efficiently synchronise data with minimal impact to the SIMS 7 service.

It is secured end-to-end by our industry standard techniques and access is controlled through our SIMS ID technology so you know your data is safe and you have full control over how the data is accessed.

DeX manages this synchronisation of data from your SIMS 7 database (S7db) to the cloud, keeping you in control of who can access that data and making integration simpler for your other products.

DeX consists of:

- a SIMS Services Manager (SSM) **Data Exchange** package.

- an application in the SIMS ID tile store named **Enable DeX Services (SIMS Data Exchange On-boarding)**, which onboards and secures the data upload from the **Data Exchange** SSM Package.

- further applications in the SIMS ID Tile Store that control the data that your partner applications can access via the DeX cloud-based APIs (Application Programming Interfaces).

> *NOTES: Installing **Enable DeX Services (SIMS Data Exchange On-boarding)** inside SIMS ID is the mechanism by which schools control the extraction of data to the cloud.*
>
> *Installing and allowing partner applications to access your data is the mechanism by which schools control data accessibility to these partner products.*
>
> *Information on the SIMS ID Tile Store is available on the SIMS ID wiki (https://id.sims.co.uk/support/wiki/14).*

Once the SSM package is installed, you are advised to turn on automatic updates so that you will not have to update the SSM client manually when we roll out new functions and features, and transfer more data to enable more of your partner applications to use that data via the cloud.

The DeX data routines will be included in each SIMS 7 release.

Patches that deliver extra functionality and bug fixes may be made available between SIMS releases, via either SOLUS or your SSU (SIMS Support Unit).

Please check with your partner product to see their roadmap for using DeX.

High level customer perspective
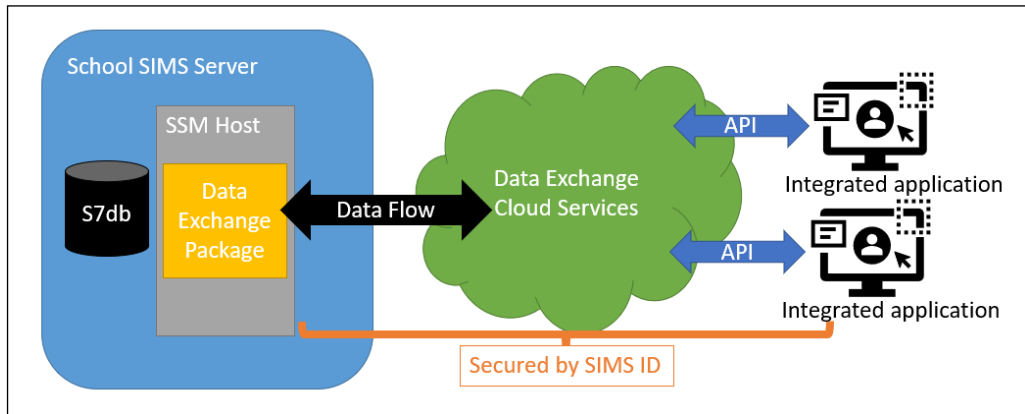
Prerequisites

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

Step	Action
Minimum technical requirements	Minimum technical requirements for schools and end users are detailed in the Technical Roadmap document, which is available on the support portal (https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0035434).
Internet connection	DeX is a web-based service that requires an internet connection to operate. Ensure you are connected to the internet when installing and using DeX.

Step	Action
SIMS compatibility	SIMS 2021 Autumn Release (7.202). Alternatively, install the latest SIMS Data Exchange Patch from Solus. This will license the Data Exchange package automatically.
Browser compatibility	SIMS Online Solutions supported browsers are detailed in the Technical Roadmap document, which is available on the support portal (https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0035434). Ensure that you are using the latest version of the browser.
Email junk folder	Add noreply@sims.co.uk to your email whitelist to ensure that the automatically generated system invite does not go into your junk folder.
SSM	SSM manages the link between SIMS and cloud-based SIMS products. You <u>must</u> upgrade to the most up-to-date version of SSM. Ensure that SSM has upgraded successfully <u>before</u> attempting to install DeX. SSM operates on the latest versions of Chrome, Firefox, Internet Explorer, Safari and Edge. If your SIMS server is hosted or managed by your Local Authority (LA) or SSU, this step must be carried out by them.
Your SIMS Data	DeX accesses sensitive SIMS 7 data (please see *SIMS 7 Data used by DeX* on page *3*). Ensure that you validate your data before onboarding to DeX.

SIMS 7 Data used by DeX

Information on the SIMS 7 data used by DeX is available on the support portal (https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0050005).

Support

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

Tasks

These are the main tasks to set up and use DeX:

- Task A: Install the SIMS Data Exchange Patch
- Task B: Enable DeX Services (SIMS Data Exchange On-boarding) in SIMS ID
- Task C: Link SIMS 7 data to DeX through SSM
- Task D: Enable partner applications.

Task A

This topic covers the installation of the SIMS Data Exchange Patch if you have not upgraded to the SIMS 2021 Autumn Release (version 7.202).

Running the Patch with SOLUS

> *NOTE: Your Local Support Unit might need to authorise the deployment of the SIMS Data Exchange Patch.*

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

Task B

This topic covers the installation of the **Enable DeX Services (SIMS Data Exchange On-boarding)** application from the SIMS ID Tile Store, and collecting the Client ID and Client Secret information that is required during the configuration of the SIMS Data Exchange Service package in Task C.

1. In a browser, sign in to SIMS ID (https://id.sims.co.uk) using a SIMS ID administrator account.

   The tiles available on the Launcher vary according to whether you are a school or an SSU.
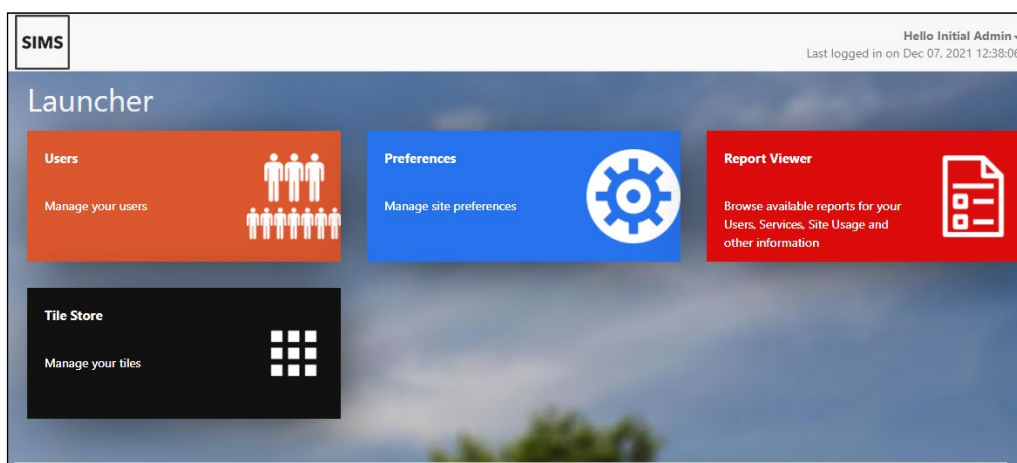
2. Click the **Tile Store** tile.
3. Locate the **Enable DeX Services (SIMS Data Exchange On-boarding)** tile. You can search for "Dex" using the Search box.

> *NOTE: If you have access to more than one school, you may need to use **Change Site** to select the correct school.*
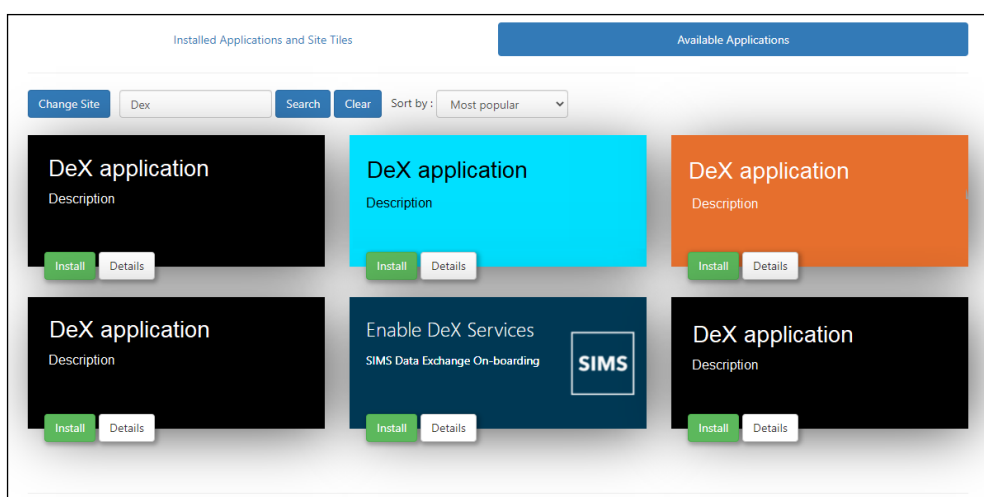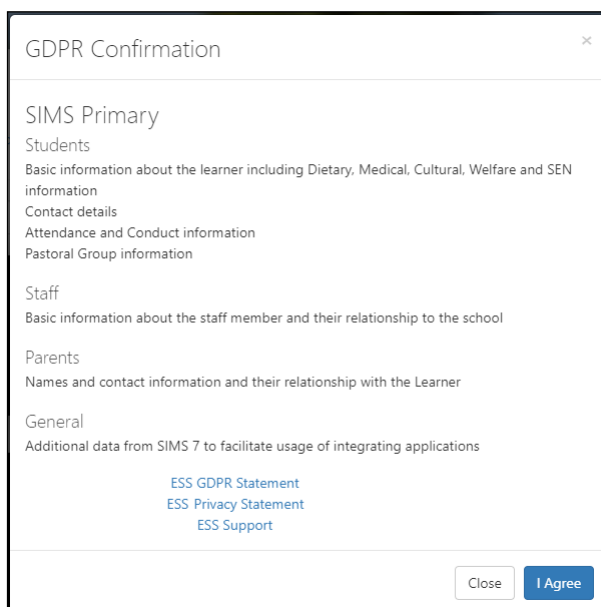
4. Click the **Install** button on the **Enable DeX Services (SIMS Data Exchange On-boarding)** tile.

*NOTE: Clicking the **Details** button displays the statements that will also be available in the following step of the process.*

The **GDPR Confirmation** screen is displayed, providing links to the ESS GDPR and Privacy Statements.
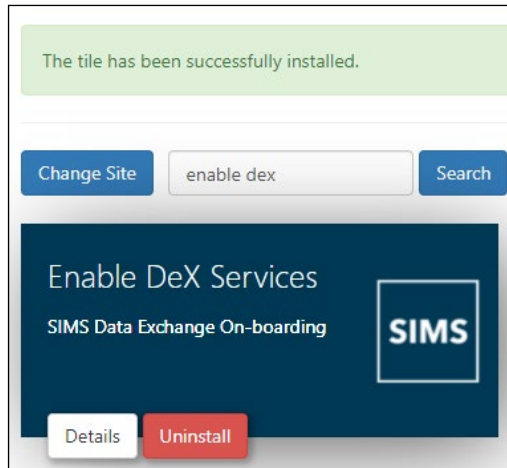
IMPORTANT NOTE: *DeX transfers sensitive SIMS 7 data. Ensure that you have read and understood the GDPR and Privacy Statements.*

5. Click the **I Agree** button to consent to the transfer of data from SIMS 7 to the cloud cache and to enable DeX Services.

When the installation has completed successfully, the following message is displayed.

NOTES: To complete the process, you must connect DeX to your main SIMS system by synchronising the Client ID and Client Secret codes in the school's SSM. This step must be completed by your IT contact.

6. Click the **Details** button on the **Enable DeX Services (SIMS Data Exchange On-boarding)** tile.

7. Before you can collect the Client ID and Secret, you will be prompted to confirm your understanding of which sensitive SIMS data is used by the DeX service.
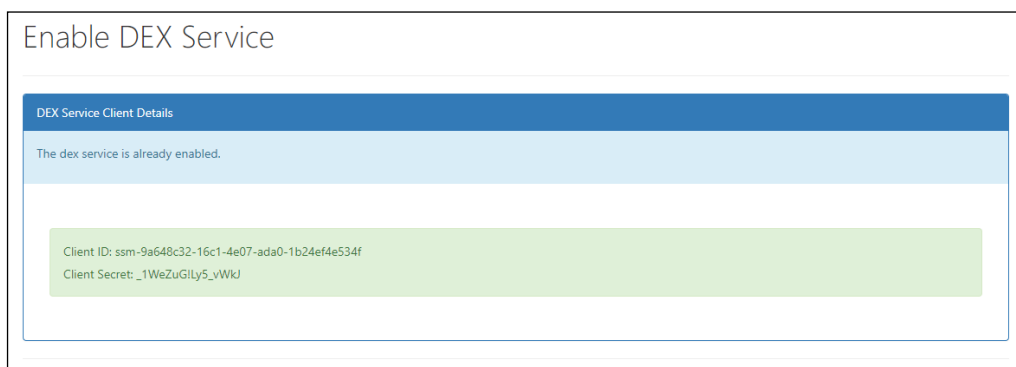
IMPORTANT NOTE: *DeX transfers sensitive SIMS 7 data. Ensure that you have read and understood the SIMS ID Privacy Statement.*
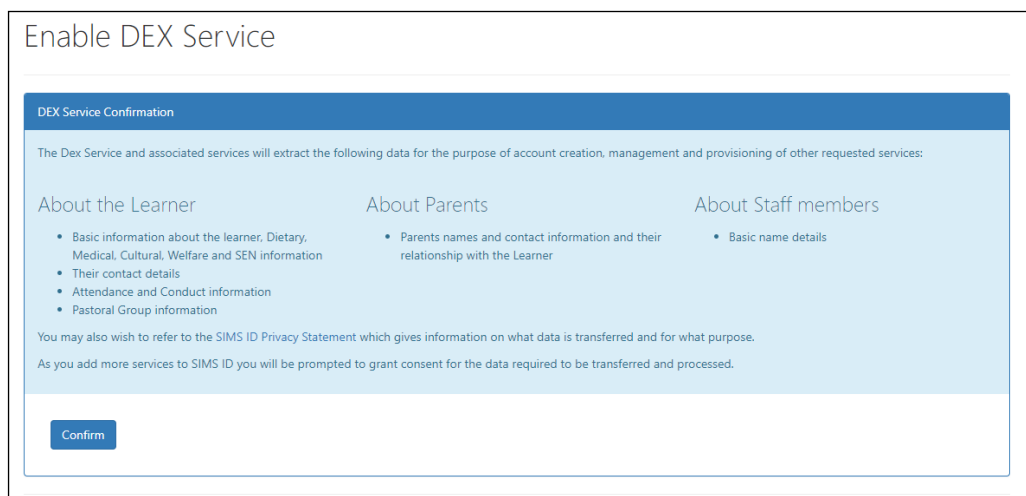
8. Click the **Confirm** button to display the **Enable DEX Service – DEX Service Client Details** screen.

9. Click the **Show Client ID and Secret for Dex** button.

   The Client ID and Client Secret are displayed.

10. Copy the Client ID and Client Secret to the clipboard in preparation for pasting them into SSM.

    > ***IMPORTANT NOTE:*** *Your IT contact is the person who has access to your SIMS Server and SSM. They might be a staff member at your school, your LA or SSU.*

    If you are the IT contact, proceed to Task C (please see *Task C* on page *7*), where you should enter the Client ID and Client Secret in SSM.

    If you are not the IT contact, send the Client ID and the Client Secret directly to your school's IT contact.
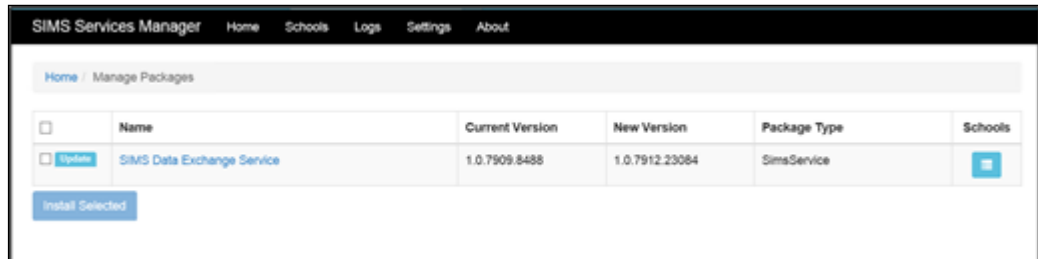
Task C

This topic covers the installation of the SIMS Data Exchange Service package using SSM.

Managing the Package in SIMS Services Manager

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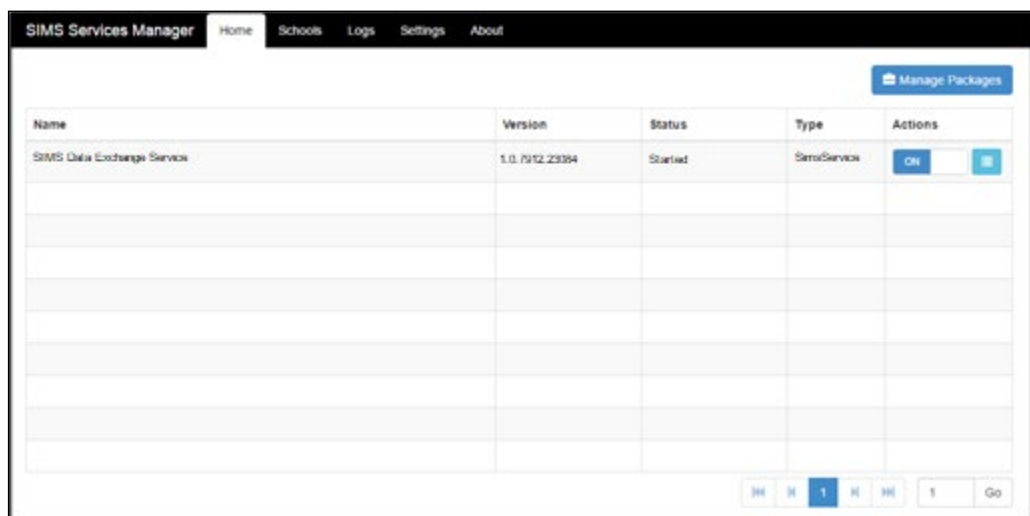
2. Click the **Manage Packages** button to display the **Manage Packages** page. The available packages should be displayed.


3. Select the **SIMS Data Exchange Service** package by selecting the adjacent check box, then click the **Install Selected** button to display the **Applying Choices** dialog.
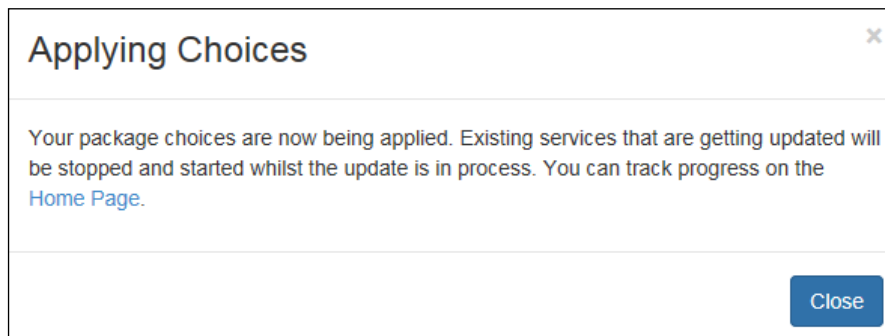
4. Click the **Close** button to return to the **Home** page. If the package has been installed, it will be displayed.

5. If the package is not displayed, continue to refresh. The **Status** will show as **Transitioning** if the page is not refreshed.

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

7. Click the **Configure** icon to display the **Configuration** dialog.
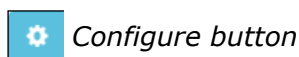
 Configure button

8. Enter your **Client ID and Client Secret**. These can be found on the **Enable DEX Service – DEX Service Client Details** screen on the **Dex On boardin**g tile in the SIMS-ID **Tile Store**.

    The data transfer will now take place.

    > **IMPORTANT NOTE:** *Synchronisation times can take anything from ten minutes to 1 hour to update. Some historic data (such as attendance) is synchronised in the background and may take longer. For full functionality, we recommend waiting overnight.*

9. Enable auto-update by selecting the **Auto Update** and **Auto Install** check boxes on the **Settings** page.

 Additional Resources:

Please refer to the Using the Settings Page topic in the SIMS Services Manager handbook for guidance on Auto Update and Auto Install.

Task D

Enable Partner Applications

Ensure that your partner application is ready for you to migrate and enable the service. Do not uninstall any on-site partner products or services until you have been told to do so by the partner.

Install the partner applications from the tile store and grant the data access rights requested by each partner product.

1. In a browser, sign in to SIMS ID (https://id.sims.co.uk) using a SIMS ID administrator account to display the **Launcher** page.

    The Launcher page is displayed.

2. Click the **Tile Store** tile.

3. Locate the product or partner application you want to enable.

4. Understand and accept the GDPR grants that will result from installing the partner application.

    The tile and app are installed (dependent on any manual steps configured to be in place by the partner).

> **Additional Resources:**
>
> *Please refer to the SIMS ID wiki (*https://id.sims.co.uk/support/wiki/14*) for additional information about the Tile Store. Read and understand the difference between tiles and associated applications.*

Uninstalling DeX

To remove DeX and stop the underlying service from transferring data, click the **Uninstall** button on the **Enable DeX Services (SIMS Data Exchange On-boarding)** tile.

1. Locate the **Enable DeX Services (SIMS Data Exchange On-boarding)** tile.
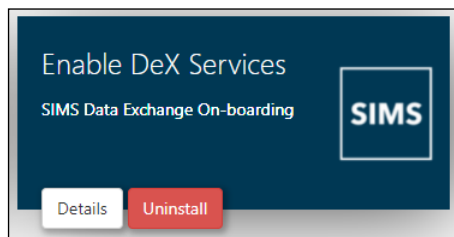
2. Click the **Uninstall** button.
3. Disable the **SIMS Data Exchange Service** package in SSM.

Where to Find More Information

All handbooks referred to in this handbook are available from the SIMS User Documentation Hub on the support portal (https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0037321).

The DeX documentation centre is available on the support portal (https://support.capitasoftware.com/csm?id=kb_article_view&sysparm_article=KB0050004).

Additional technical information is available in the SIMS ID wiki (https://id.sims.co.uk/support/wiki/14).