SIMS ID Registration with SIMS Agora

A Troubleshooting Guide and Latest Updates
Last updated 3rd October
SIMS ID Registrations

Overview
SIMS ID Registration

- SIMS ID offers flexible identity management and single sign on across the whole SIMS Product Portfolio. For instance your users will be able to use other authentication providers and you will now be able to have a single login for Agora and Parent.

- As SIMS Agora now uses SIMS ID the process to register has changed.

- When a user creates an account using SIMS ID (parent or employee) for security reasons this is matched with the respective person records within your SIMS Database. This ensures SIMS ID can continually monitor that persons record in SIMS and ensure they are only given access to products/ information they are allowed to (e.g. tracking parental responsibility and court orders).

- A benefit for schools and parents is therefore the reassurance that student data is safe and secure by ensuring only the people who should have access to it do.

- However in providing this level of security this can have consequences when registering accounts if differences in SIMS exist.

- As both SIMS ID and SIMS Agora systems rely on the data contained within your school data, if there are differences in SIMS parent users may:
  1. Not be able to register and experience a registration delay
  2. Register but are missing children link

- The following document will provide you with what to do next if you experience these issues.
Users Experiencing Registration Delay

What to do next?
Experiencing Registration Delays

If you have users whose registrations fail to complete, there is no need to generate and re-invite the user immediately*:

- If the parent has an email address within SIMS Agora an automated email will be sent to complete their registration.
- This email will be sent within 24 hours of the user experiencing the registration delay – be sure to check junk folders.
- What if the email doesn’t turn up? OR they don’t have an email address? Please see over page Registration Delay What Next?.

Contents of the Email for illustrative purposes only:

We have identified that you encountered a registration delay during your recent SIMS Agora registration at Green Abbey Academy
You can now complete your registration and access SIMS Agora by clicking on the link below and sign in using the Microsoft account you registered with.

https://www.simsagora.co.uk/Registration/Callback/00000000-0000-0000-0000-000000000000

If clicking on the link does not work, please copy and paste the link address into a browser window.

We apologise for the delay in setting up your account.

Kind Regards SIMS Agora online payments

*Generating a new invite starts the process again.
Registration Delay What Next?

Parent did not receive the email?
1. Parents may have more than one mailbox please ensure they have checked the correct mailbox.
2. Please ensure the email address is a valid email within SIMS – if its not please update within SIMS
3. Do NOT generate a new invite for the user
4. Please follow the remaining troubleshooting advice in this document

The Parent does not have an email address?
1. Do NOT generate a new invite for the user
2. Please follow the remaining troubleshooting advice in this document
Troubleshooting Guide

Step 1: Using the Registration Status Report to understand if Parents have Registered
You can use the Registration Status Report to understand a number of registration scenarios including whether parents have successfully registered their SIMS ID account and the account is linked to their child.

- Please review the remaining section to highlight potential issues and what to do next.

You can download the report to spreadsheet to help query the data.
Registration Status Report

• If a parent has successfully registered their account and it is linked to their child the report will surface Yes in both Account Registered and Invitation Code Linked columns.

• If you have parents with more than one child at your school they will only need to register once. This means the report will have Yes in both Account Registered and Invitation Code Linked columns.

• If you find this is not the case please refer over page.

Scenario 1 - Contact successfully registered with children links

<table>
<thead>
<tr>
<th>Person Name</th>
<th>Group(s) / Staff Code</th>
<th>Contact Name</th>
<th>Account Registered</th>
<th>Invitation Code Linked</th>
<th>Invitation Code Generated</th>
<th>Invitation Code Expired</th>
<th>Order(s) Placed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbot, Chris</td>
<td>Year 7</td>
<td>4B</td>
<td>Abbot, Mr Steve</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Abbot, James</td>
<td>Year 12</td>
<td>12 C</td>
<td>Abbot, Mr Steve</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Note both contacts express Yes combinations.
Using the Registration Status Report

- When running the report if you find that a Contact has an Account Registered and Invitation Code Linked but the same contact does not have an Account Registered and Invitation Code Linked for their other child this scenario will indicate that you have multiple versions of the contact within SIMS.

- To resolve this scenario please see Checking for Duplicate Records in SIMS later in this document

Scenario 2 - Multiple Contact Records exist in SIMS for the child relationships

<table>
<thead>
<tr>
<th>Person Name</th>
<th>Group(s) / Staff Code</th>
<th>Contact Name</th>
<th>Account Email Address</th>
<th>Invitation Code Generated</th>
<th>Invitation Code Expired</th>
<th>Invitation Code Linked</th>
<th>Account Registered</th>
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<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
Troubleshooting Guide

Step 2: Checking for Duplicate Records in SIMS
Querying SIMS to check for Duplicate Records

- Within SIMS go to Reports and run the “Duplicate Contact Check” report.
- This can be found by going to the following menu routes:
  - Reports | Run Report
  - Expand Focus, click the Contact folder
  - Run the report titled ‘Duplicate Contact Check’
- The output of the report will allow you to view duplicate contact records.
- What do I do next?
  - See over page Unlinking and Deleting Duplicate Records
Unlinking and Deleting Duplicate Records

• Once you have identified a duplicate contact within SIMS you will need to unlink the contact from the student by:

1) Finding the contact within Find Contacts
2) Open the contact record in Panel 4 (Associated Students)
3) Deleting the Link with the Associated Student.

• Once a contact has been unlinked from all students they can be deleted in Tools | Housekeeping | Delete Unlinked Contacts

• What do I do next in SIMS Agora?
  o See over page Step 3…
Troubleshooting Guide

Step 3: I’ve completed Steps 1 and 2; What Next?
What Next

1. Find the parent within SIMS Agora’s users management
2. Please generate and new invitation and resend it to the parent.

3. If you are still having issues with the parent experiencing registration issues please escalate to your support unit.
Latest Software Updates

Last updated 3rd October
Latest Software Updates

• We are enhancing the registration process over the course of coming days and weeks in response to feedback.

• The following section provides details of the latest updates.
Updates to Registration Flow

- All new registration invites will now direct new users to the SIMS Agora website www.simsagora.co.uk

- From there they will be able to select the Register button and will be redirected to register their account.

- Invites that have already been generated and sent out via email and letter will still be valid. We have also updated the mail merge letter template at http://simspublications.com/667831/resources.html

Released 27th September
Updates to Registration Flow

• Following selecting the Register button users are taken to Registration Welcome where they will be prompted to enter their invitation code.

• The Registration Welcome displays the users name if known and the account the user is currently signed in with. This is to help prevent users registering with the wrong account.

• Registration Welcome will validate the invitation against the account used by the user.
  o Users will be sent to SIMS ID if the invitation exists, has not yet been linked, and the account is not registered to the invitation’s school.
  o If the user is not taken to SIMS ID this is explained over-page.
Updates to Registration Flow

• Users will see *Invitation code is no longer valid* if the code has been regenerated, has expired, or has already been linked to a person.
Updates to Registration Flow

• If the invitation code is valid, but the account is already registered with someone else at the school, the user is shown
• As an example, Parent A may be trying to register as Parent B.
Updates to Registration Flow

• If a user is registering their account with a valid invitation code, they believe they are logged in as the correct person but are prevented from registering, this is an indication that the user has a duplicate record within the schools SIMS database – please see Step 2 in the Troubleshooting section to resolve the problem.