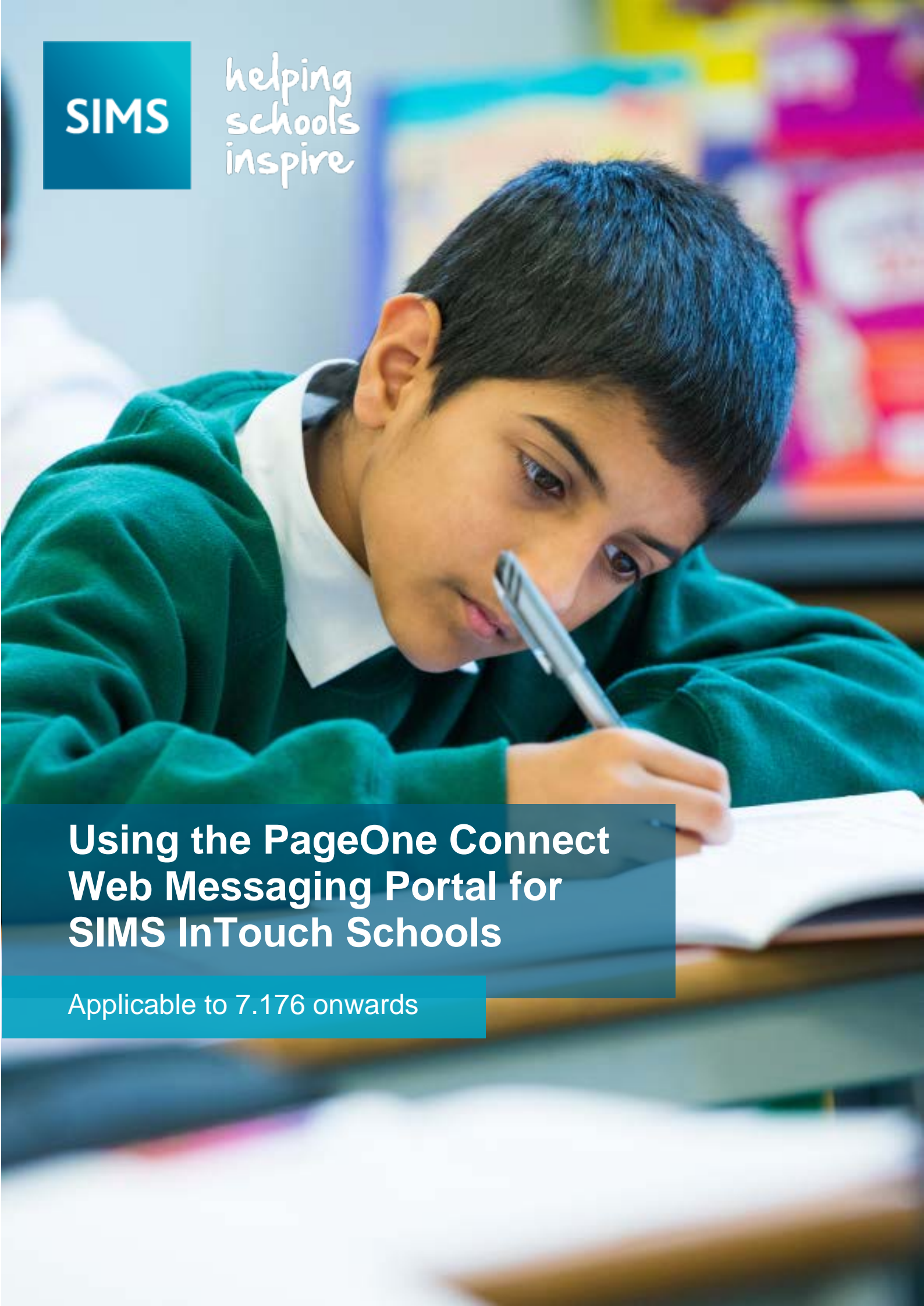




SIMS

helping
schools
inspire



**Using the PageOne Connect
Web Messaging Portal for
SIMS InTouch Schools**

Applicable to 7.176 onwards

Revision History

Version	Change Description	Date
7.176 - 1.0	Initial release.	29/06/2017

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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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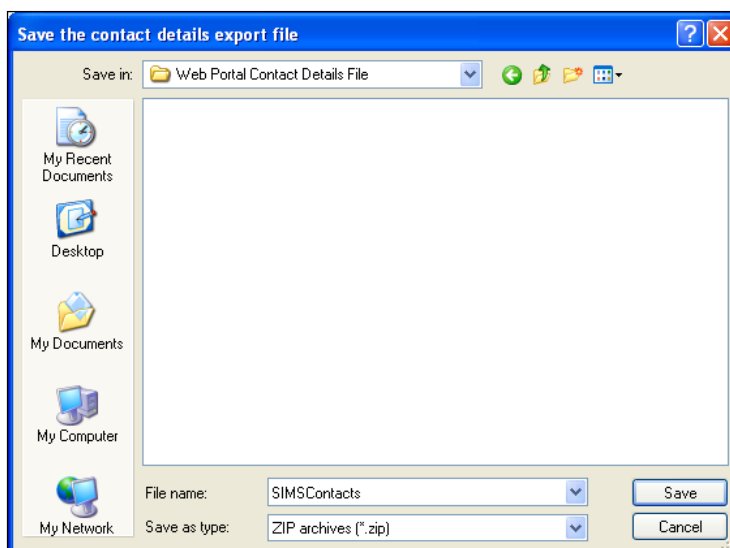
Introduction

The PageOne Connect Web portal is a secure, web-based messaging account that enables SIMS InTouch customers to upload contact information from SIMS. It also enables the selection and sending of text messages to staff, pupil/students and parental contacts of pupil/students. This is particularly useful when working off-site or do not have access to SIMS (e.g. during a school closure that is caused by inclement weather conditions).

This chapter assumes that your school exports contact details from SIMS and uploads them to the PageOne Connect Web portal (please see *Exporting Contact Information from SIMS InTouch* on page 1).

Exporting Contact Information from SIMS InTouch

1. Log into SIMS as a user with System Manager permissions.
2. Select **Routines | Data Out | InTouch | Export Contact Details** to display the **Save the contact details export file** dialog.



3. Navigate to a secure location to which you want to save the export file.
4. Enter a unique and recognisable **File name** for the export file.
5. Click the **Save** button to export the file.

The file is saved with a .zip extension. A confirmation message is displayed once the export is complete.

NOTE: Do not upload the .zip file produced by the export routine in SIMS to the PageOne Connect Web portal; instead, you must unzip the export file and upload the resulting .xml file.



6. Log into the PageOne Connect Web portal upload the exported file (please see *Uploading SIMS Contact Details to the PageOne Connect Web Portal* on page 4).

Logging in to the PageOne Connect Web Portal

The PageOne Connect Web portal is a secure, web-based messaging account that enables you to import SIMS contact details from SIMS, and to select and send text messages when you are off-site or do not have access to SIMS.

Each registered school/establishment is allocated a Connect 'master' admin account with specific user name and password credentials. The master admin account enables you to:

- import SIMS contact information.
- check current SMS credits and order new SMS text message blocks.
- create and edit user accounts (these are accounts that can send messages via the Web portal).

- create and edit message templates.
- view the message log of all accounts.

The standard login page can be accessed here (<http://www.pageone.co.uk/login>). An alternate (or secondary) login page can be accessed here (<https://www.oventus.com/oventus/authenticate>).

Enter your allocated **Username** and **Password** and click the **Log In** button to open a secure, authenticated session.

The main menu items are displayed in the **Services** panel on the left-hand side of the page. Any contacts that have already been imported are displayed on the **Contacts** tab in the **Tools** panel on the right-hand side of the page. If you have not yet imported contacts, the **Contacts** tab will be empty.

The **Services** and **Tools** panels can be hidden by clicking the adjacent chevron. To display a hidden panel, click the chevron again.

Logging out of the PageOne Connect Account

To log out of the PageOne Connect Web portal, click the **SIGN OUT** button at the bottom of the **Services** panel.

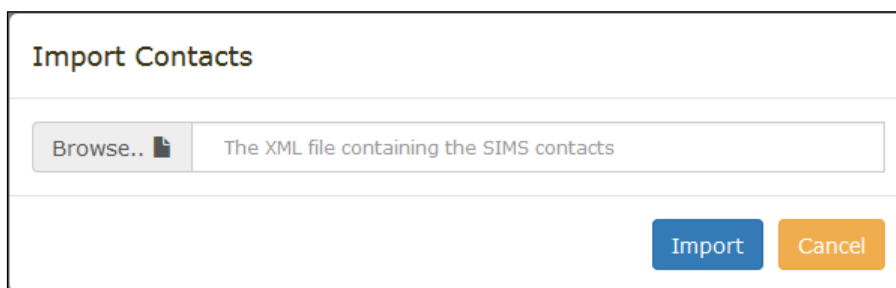
Uploading SIMS Contact Details to the PageOne Connect Web Portal

When you log in to the PageOne Connect Web portal using the master account, it is possible to upload the SIMS InTouch contact file previously exported from SIMS InTouch (via **Routines | Data Out | InTouch | Export Contact Details**). Uploading a contact file enables the sending of messages to SIMS contacts when you are off-site or do not have regular access to SIMS.

IMPORTANT NOTE: Do not upload the .zip file produced by the export routine in SIMS to the PageOne Connect Web portal; instead, you must unzip the export file and upload the resulting .xml file.

If you do not upload contact details previously exported from SIMS InTouch, it is still possible to send messages but the mobile numbers will have to be entered manually.

1. In the menu on the left-hand side of the page, click **CONTACT MANAGER** to display the **Contact Manager** page.
2. Click the **Import** button to display the **Import Contacts** dialog.



3. Click the **Browse** button, navigate to the location of your SIMS contact export file (the .xml file), highlight it, then click the **Open** button to return to the **Import Contacts** dialog.
4. Click the **Import** button to upload the selected contact details file to the Web portal.

IMPORTANT NOTE: Do not refresh your Web browser while the contact file is being uploaded to the Web portal.

5. When the contact details file has been imported successfully, a message is displayed.

If the file has imported successfully, the contact list should be displayed on the **Contacts** tab on the right-hand side of the page.

If a message indicating that an error has occurred during the upload process is displayed, re-run the upload process. If this does not work, you are advised to log out of your account, log back in and attempt the import process again. If the problem persists, please contact your Local Support Unit.

IMPORTANT NOTE: Each time you upload a new version of the SIMS contact data file to the PageOne Connect Web portal, all existing contact details are overwritten.

How SIMS Contact Data is Stored

The PageOne Connect Web portal will import SIMS contact data and store individual contact records, together with fields for specific roles and groups, and the relevant contact numbers associated with that contact.

When the SIMS contact export file is uploaded to the PageOne Connect Web portal, individual contact records are created in the portal, together with fields for specific roles and groups, and the relevant contact numbers associated with each contact.

An individual contact's record can be viewed by clicking **CONTACT MANAGER** in the menu on the left-hand side of the page and then clicking an individual contact on the **Contacts** tab on the right-hand side of the page. Alternatively, use the **Search** field to locate a specific contacts. The panel in the centre of the **Contact Manager** page displays the individual contact record details.

Contact Manager

PERSONAL DETAILS

***First Name:**

***Second Name:**

Role:

CONTACT DETAILS

Phone:

Primary Parent:

Parents:

EXTENDED DETAILS

House:

Registration Group:

School:

School Tier:

Year Group:

When the SIMS contact export file is uploaded to the PageOne Connect Web portal, various mobile numbers are stored in the portal, as displayed in the following graphic.

CONTACT DETAILS	
Phone:	447093615474
Primary Parent:	447224631848
Parents:	447596231323

- **Phone** - this is the primary mobile number of the contact, i.e. the pupil/student's or staff member's own mobile number.
- **Primary Parent** - this is the mobile number of the primary parental contact for the pupil/student.
- **Parents** - these are the mobile numbers of all registered parents for the pupil/student.

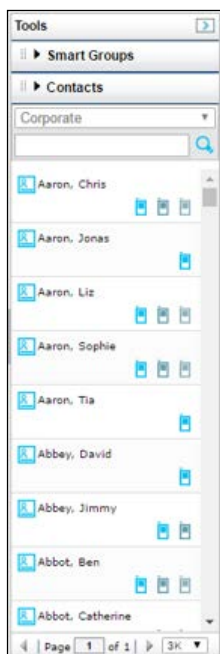
IMPORTANT NOTE: Text messages sent to landline numbers are sent using a text-to-speech service. The caller will be prompted to press **1** to listen to the message.

Fields are created automatically for the standard groups in SIMS, together with any other groups that may have been created in the **Extended Details** section of a contact record, as displayed in the following graphic.

EXTENDED DETAILS	
House:	Boyle
Registration Group:	6CH
School:	Duchy School
School Tier:	Prep
Year Group:	Year 6

Contacts List

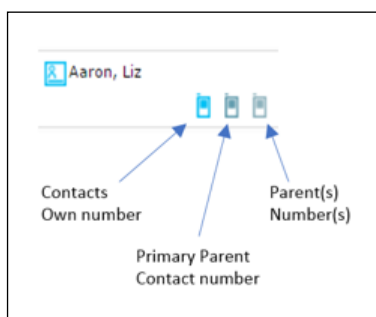
The imported contacts are displayed on the **Contacts** tab on the right-hand side of the page. The list is paginated and you can use the **Search** box to search for a contact by name.



Up to three contact number icons are available for each contact.

TIP: Hover over a contact number icon to view the mobile number.

On the **Compose Message** page, click a contact's icon to send a message to that specific number. Alternatively, click multiple numbers for a contact to send a message to all their numbers.



User Management - Creating and Editing New User Accounts

Each registered school/establishment is allocated a PageOne Connect 'master' admin account with specific user name and password credentials. The master admin account includes the **USER MANAGEMENT** tab, which enables you to:

- import SIMS contact information
- check current SMS credits and order new SMS text message blocks *
- create and edit user accounts (these are accounts that can send messages via the Web portal)
- create and edit message templates
- view the message log of all accounts.

* Dependent on the SMS tariff option to which you have subscribed.

For security purposes, you must re-enter the username and password credentials for your account to access User Management function.

User Accounts

User accounts are created and edited using the master admin account. It is possible to create up to 10 user accounts for people who may want to use the PageOne Connect Web portal to send SMS messages when their SIMS system is unavailable.

Each user account has its own login credentials; any messages sent from a user account will be logged as being sent from that account.

From the master account, you can see all messages, from all accounts.

NOTE: All messages are chargeable against your master account.

In the menu on the left-hand side of the page, click **USER MANAGEMENT**.

Select the **User Accounts** tab to display a list of all current accounts, together with the number of accounts that have been created (**Accounts Created**) from your **Total Allowance**.

Username	User Id	Status	Alpha Tag / MSISDNs	Notes
SIMSMaster2	15502066	Active	2	Note for SIMSMaster2
sims2child1	57502205	Active	1	Note for sims2child1
sims2child2	57502206	Active	1	Note for sims2child2

The following account information is also displayed:

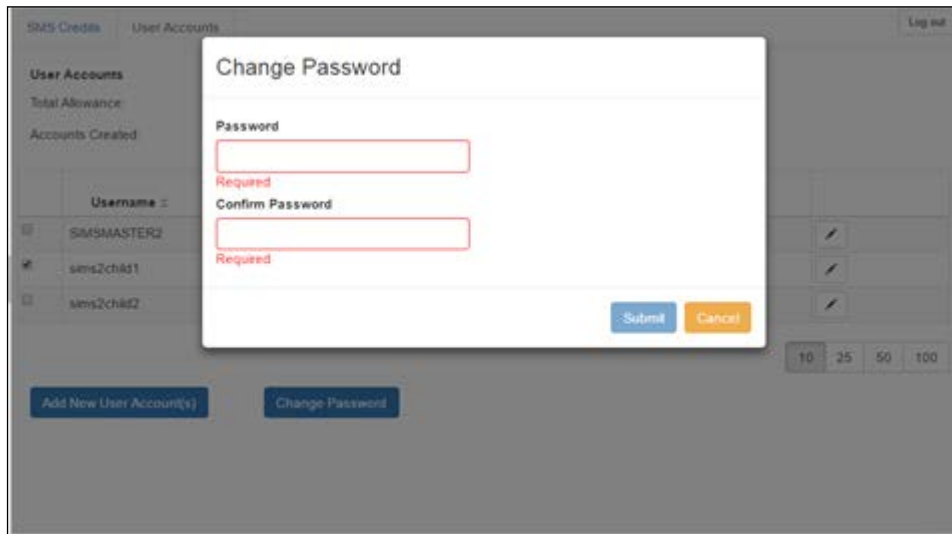
Username	This is the unique username that is used to log in to the Connect account
User Id	A unique reference ID for the account. Please note that the master account is displayed at the top of the list. Master accounts have a User Id beginning 1nnnnnnn. User accounts have a User Id beginning 5xxxxxxx.
Status	This is set to either Active or Suspended . To suspend an account (to prevent it from sending messages), click the Active button and select Suspended .
Alpha Tag/MSISDNs	This displays the virtual mobile number assigned to your account.
Notes	This field can be used for your own comment against an account, e.g. to record to whom you have allocated the account. Click in the field and amend the text, if required.

Other User Account Options

Add New User Account(s) – enables the creation of new user accounts by specifying a **Username** and **Password**.

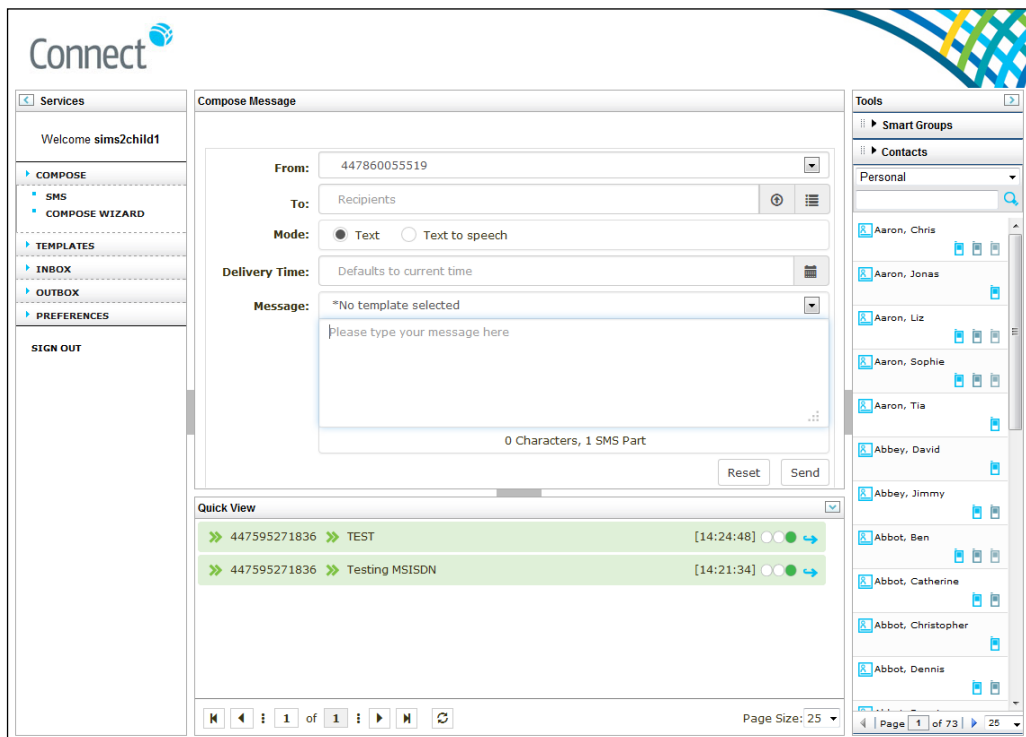
The screenshot shows the 'Add New User Accounts' form. The form is titled 'Add New User Accounts' and is overlaid on a dashboard. The dashboard shows 'User Accounts' with a table of existing accounts. The form asks 'How many accounts would you like to set up?' with radio buttons for 'Single' (selected) and 'Multiple'. It contains three required input fields: 'Username', 'Password', and 'Confirm Password'. A 'Submit' button and a 'Cancel' button are at the bottom right of the form.

Change Password - select the check box of the **Username** for which you want to change the password, click the **Change Password** button and enter the new **Password** and **Verify Password**.



Sending Text Messages

Text messages can be sent only from a user account; it is not possible to send them from the master admin account. User accounts have a **COMPOSE MESSAGE** function, which is displayed on-screen once you have logged in.



The **COMPOSE** option in the menu on the left-hand side of the page provides the option to send messages in the following ways:

- **SMS** - send a message manually to one or more recipients.
 - a. Enter the mobile number in the **To** field. To send the message to more than one recipient, separate mobile numbers with a semi colon. Alternatively, use the **Contacts** tab on the right-hand side of the page to search for and select the required recipient(s).
 - b. Enter the **Message** text, or select a pre-defined **Template** message from the drop-down list.
 - c. Click the **Send** button.
- **COMPOSE WIZARD** – guides you through the process of sending a message using a wizard (please see *Using the Compose Wizard to Select and Send Messages* on page 11).

Using the Compose Wizard to Select and Send Messages

The **Compose** wizard provides a simple, step-by-step process that enables you to select the intended recipients of a message from the imported SIMS contact list.

Step 1 - Selecting the recipients

Select how you want to select the intended recipients.

Recipient selection Mode

Please choose the selection mode

All recipients
 Recipients by role
 Recipients by role and group

- Selecting **All recipients** sends a message to all of the contacts in the imported SIMS contact list.
- Selecting **Recipients by role** enables the selection of one or more roles to whom you want to send a message. This sends a message to all of the contacts registered against the selected roles. In the following example, **Primary Parent** and **Student** are selected.

Select Recipient By Roles

Select the roles of the recipients you wish to message.

Roles

Agent	Employee	Parent	Primary Parent	Student
-------	----------	--------	----------------	---------

Reset Previous Next

- Selecting **Recipients by role and group** enables the selection of one or more roles, together with specific groups to whom you want to send a message. Select the required groups from the drop-down lists.

Select Recipient Role & Groups

Select the role and groups that the recipients must belong.

Roles

Agent Employee Parent Primary Parent Student

Groups

House Select ▾

Registration Group Select ▾

School Select ▾

Boarder Status Select ▾

Year Group Select ▾

School Tier Select ▾

Reset Previous Next

It is possible to select all groups (**Check All**), individual groups or a selection of groups.

Select Recipient Role & Groups

Select the role and groups that the recipients must belong.

Roles

Agent Employee Parent Primary Parent Student

Groups

House Select

Registration Group Check All Uncheck All

School

Boarder Status Boyle

Year Group Curie

School Tier Hooke

Newton

Reset Previous Next

Step 2: Entering the message text

After selecting the recipients, enter the message text or select a pre-defined message template. As the message text is entered, the character count is updated, together with the number of chargeable SMS parts to which the message equates. Full details of how the number of message parts is calculated for SMS messages is available from the PageOne website (<http://www.pageone.co.uk/sms-message-formatting-and-charging>).

Text Message

Please enter the message you wish to send.

Recipients: All recipients which have the role 'Primary Parent' or 'Student' and in groups

From: 447860055519

Message: *No template selected

This is the message that I want to send.

40 Characters, 1 SMS Part

Reset Previous Next

*NOTE: The SMS text message will be sent 'from' the two-way virtual mobile number assigned to your account, as displayed in the **From** field. This is also the number to which any replies are sent.*

Step 3: Reviewing the message summary

The **Message Summary** view enables the checking and reviewing of the message details, including the intended **Recipients** (i.e. the selected roles, groups, etc.) and number of **Members** to whom the message will be sent.

Message Summary

Please review your message and either press 'Send' or 'Reset' to finish.

Recipients: All recipients which have the role 'Primary Parent' or 'Student' and in groups

Members: 1053 matching phone entries

From: 447860055519

Message: This is the message that I want to send.

40 Characters, 1 SMS Parts

To revisit the previous pages of the wizard, click the **Previous** button, if required.

Click the **Send** button to send the message. Alternatively, click the **Reset** button to cancel the process.

When the message is sent, the **Message Accepted** confirmation is displayed. To view a log of the individual messages sent, click the **OUTBOX** option in the menu of the left-hand side of the page.

Message Recipients and Message Parts

The **Compose Message** page provides the following information before the message is sent.

- Number of recipients (i.e. individual numbers to which the message will be sent)
- Number of message parts – a standard SMS text message consists of up to 160 characters. Longer messages, or those that include extended or international characters, might reduce the number of characters per message part.
- A warning (in red) if your message text includes any extended or international characters. The use of such characters increases the number of chargeable message parts.

*NOTE: If you are copying message text from another application and pasting into the **Compose Message** page, ensure that you use the 'paste as plain text' function to prevent any control and formatting characters from being copied; control and formatting characters will be seen as extended characters, therefore reducing the number of message parts.*

Full details of how the number of message parts is calculated for SMS messages is available from the PageOne website (<http://www.pageone.co.uk/sms-message-formatting-and-charging>).

Sending Messages to Mobiles not in the Contact List

It is possible to send messages to mobile numbers that are not stored on the PageOne Connect Web Messaging Portal.

From the **Compose Message** page, you can enter one or more mobile numbers directly in the **To** field.

NOTE: If you are entering more than one number, separate each number with a semi-colon (;).

Alternatively, you can upload a CSV file that contains a list of mobile numbers exported from SIMS by clicking the **Upload** button.

To view a list of the uploaded numbers, click the **List of Recipients** button.

Templates - Creating and Saving Template Messages

Standard message text can be saved as a template. Saved template messages are available for selection from the **TEMPLATES** tab.

1. To create a new template, click **TEMPLATES** in the menu on the left-hand side of the page and then click the **Add New Template** button at the bottom of the page.

2. Enter a **Template Name**. This is the name displayed in the template drop-down list on the **Compose Message** page.
3. Enter the message text in the **Designer** panel. Text, date and time fields can be added to the template message.



Insert Date Field button



Insert Time Field button



Insert Input Field button



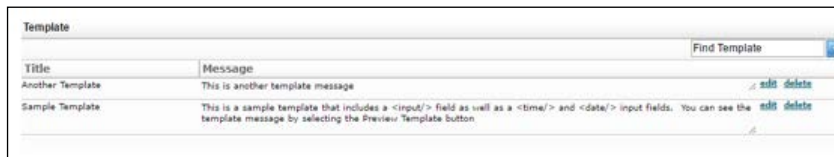
4. Click the **Preview Template** button to view the template message.



Preview Template button



5. Close the preview view and click the **Save** button.



The new template is now available from the template drop-down list on the **Compose Message** page, from where it can be edited and deleted.

Message Outbox

The **OUTBOX** option in the menu on the left-hand side of the page displays a log of all messages sent via SIMS InTouch and any messages sent via the PageOne Connect Web portal.

From	To	Message	DateTime	Status
447860055478	447788924555	Don't forget to put Sports Day - 26th July 2017 - into your diary. Everyone welcome to come along and support the children	2017-03-09 11:13:00	

The delivery **Status** indicator uses a traffic light indicator to show the delivery status of messages.

- Green – indicates that the text message has been delivered to the mobile handset.
- Yellow – indicates that the text message is pending, awaiting confirmation of delivery.
- Red – indicates that the sending of the text message has failed or the mobile number is invalid.

A filter option enables the creation and saving of filter rules.

The **Report** button enables you to select a date range (up to last 90 days) for the following message reports and exports, and to export them to Microsoft Excel as a CSV file.



Report button

- All Messages – displays a log of all individual messages.
- Account Summary Report – displays a summary of messages per user account.
- Message Count by Date – displays a summary of messages per day.
- Invalid address report – displays a log of all failed or invalid numbers.

NOTE: When logged in to a user account, messages sent from that account can be viewed in the Outbox. The Outbox of the master admin account displays all messages from all user accounts, together with any messages sent directly via SIMS InTouch.

Message Inbox

The **INBOX** option in the menu on the left-hand side of the page displays a log of all inbound text messages, together with replies received to the virtual mobile number assigned to your school.

From	To	Message	DateTime
447788924555	447860055478	Unfortunately I will be unable to attend parents evening next week. Kind Regards, John Dunn, parent of Sarah Dunn, Year 3	2017-03-09 11:16:22

The filter options enables you to create and save filter rules.

SMS Messages - Checking SMS Balances and Ordering new SMS Blocks

Depending on the tariff option for your account, the PageOne Connect Web Messaging master account may enable you to check the current SMS balance and order a new SMS block. These functions are restricted to your master admin account and are accessed via the **USER MANAGEMENT** tab. For security purposes, you will need to re-enter your **Username** and **Password** to access these functions.

1. In the menu on the left-hand side of the page, click **USER MANAGEMENT**.
2. Enter your **User** name and **Password**.
3. Click the **SMS Credits** tab.

The following options are available:

- View the current SMS credit balance (**Remaining Balance**)
- Set up SMS low credit alerts, enabling you to receive an email alert when the SMS balance reaches a pre-defined figure.
- Top up SMS Credits by ordering a new SMS block. Please note that when you order a new SMS block, it will be credited to your account immediately, and an invoice will be generated and sent to your school/establishment.

The screenshot displays the 'SMS Credits' management page. At the top, there are tabs for 'SMS Credits' and 'User Accounts', and a 'Log out' button. The 'SMS Credits' section shows a 'Remaining Balance' of 4996. Below this, the 'SMS Low Credit Alert' section is shown with a status of 'Enabled'. It includes a 'Threshold Limit' field set to 200 and an 'Email Address' field set to 'youname@yourschool.co.uk'. There are 'Modify' and 'Disable Alerts' buttons. The 'Top-up SMS Credits' section includes a 'Top-up block size' dropdown menu (set to 'Select a block size'), a 'Top-up block price' field, a 'Your Reference (Max. 25 characters)' field (set to 'Enter your order reference here (Optional)'), and an 'Order Confirmation Email Address' field (set to 'youname@yourschool.co.uk'). There are 'Order SMS Credits' and 'View SMS Credits Order History' buttons.

SMS Credits

This displays the current number of SMS credits available on your account.

IMPORTANT NOTE: It is possible to send text messages only if you have sufficient SMS credits at the time of sending. SMS credits can be topped up at any time by ordering a new SMS block (please see Top-Up SMS Credits on page 21).

New SMS block credits are credited to your account immediately and are valid for 12 months from the time of ordering.

SMS Low Credit Alert

This displays any current low credit alerts that have been set up, including the threshold limit and the email address to which the alerts will be sent.

To add a low credit alert, enter the **Threshold Limit** (i.e. the SMS balance at which the alert will be triggered) and an email address to which the alerts should be sent. Click the **Modify** button.

Notifications can be enabled or disabled. To amend the low credit alert, enter a new **Threshold Limit** and an email address, then click the **Modify** button.

An SMS low credit alert email will be sent to the selected recipients if your SMS credit reaches the threshold limit.

Top-Up SMS Credits

It is possible to order SMS blocks, which are added to your SMS credit balance immediately.

1. Select the required **Top-up block size** from the drop-down list. The adjacent **Top-up block price** is updated automatically.
2. Enter **Your Reference**, if required. This could be a purchase order number or another internal reference.
3. Enter the **Order Confirmation Email Address**. The SMS top-up email confirmation will be sent to this address.
4. Click the **Order SMS Credits** button.

The new SMS block credits are credited to your account and can be used immediately.

Your top-up order also generates an invoice to your school/establishment, which will be payable as per the PageOne terms and conditions.