

# MISapp

## User Guide

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# Chapter 1

## Introduction

MISapp is a small application that runs alongside SIMS.net. It runs daily to import new and update existing names within Fund Manager.

It's easy to install and we cover this in chapter 3.

But there are a few preparatory tasks to do before installation which we cover in chapter 2

### What if I don't understand something or I need more help?

- You can find more support on using Fund Manager on Pebble's Support Website, available by clicking [here](https://support.mypebble.co.uk).

#### Tip:

If you are reading this from a printed version, you can access the Support Website by opening a browser, and entering 'https://support.mypebble.co.uk/Content/support/home.htm' in the URL (without the inverted commas) like this:

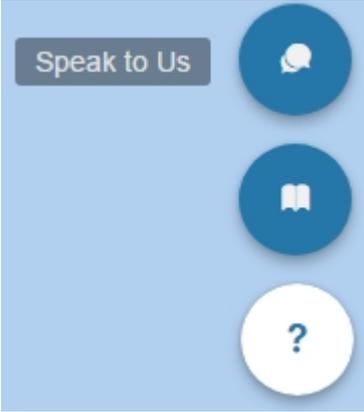


- You can see helpful information we share with you or have a conversation with us through the Conversations feature in Fund Manager.

1. Hover the mouse over the Help icon.



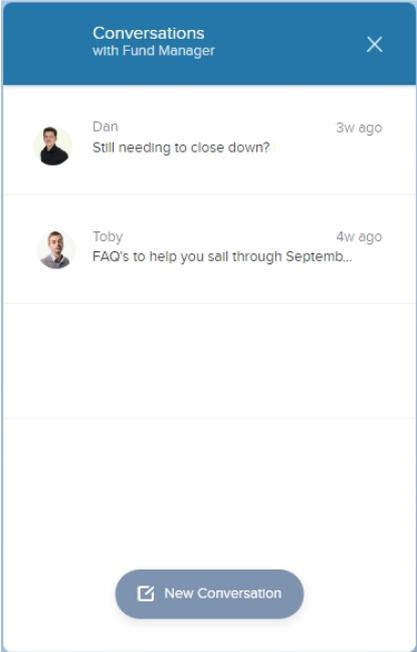
This produces a pop-up menu to choose from.



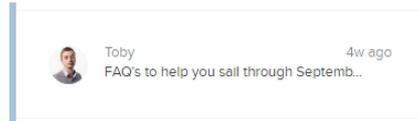
2. Select the Speak to Us icon.



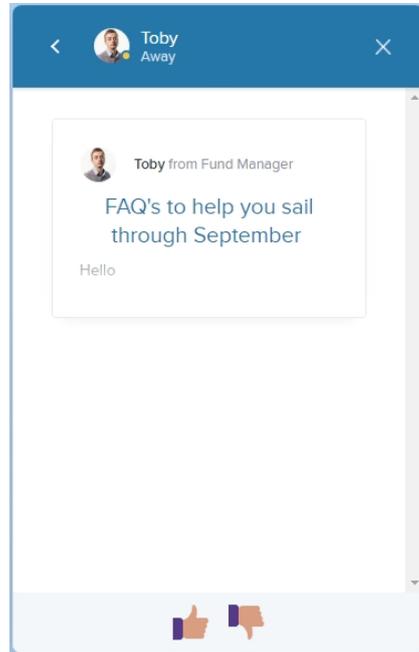
This produces the Conversations with Fund Manager window.



3. To view a message we have sent, click the conversation.



- The conversation is expanded.
- Click the box with the conversation to see the full message.



**Note:**

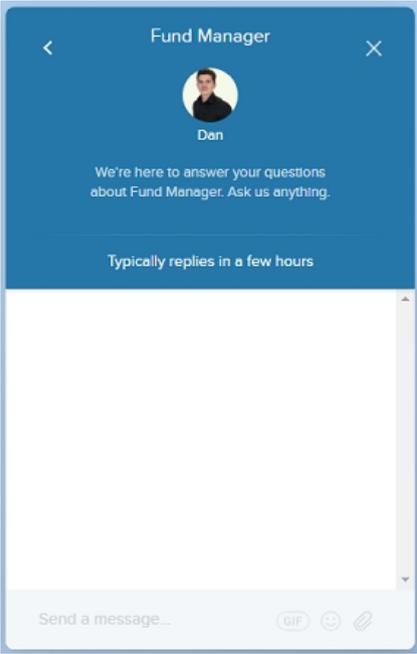
You can give us feedback on how helpful you found the message and this will help us to improve the help we give you in future.

- Click Thumbs Up  if you found it helpful
- Click Thumbs Down  if you found it unhelpful

4. To start a new conversation or ask us a question, click New Conversation.



This opens a new conversation and you can type in your question to us in that window.



# Chapter 2

## Preparation

**Important!** The tasks described in this chapter must be undertaken before you install MISapp.

### SIMS.net

Check that you have the correct permissions and access to SIMS.net. You must be a member of the following SIMS.net groups:

- Admin Assistant
- Class Teacher
- Personnel Assistant and Third Party Reporting

To check you have the correct permissions in SIMS.net:

1. Open Focus > System Manager > Manage Users.
2. Search for your ID.
3. Check the groups you belong to in Section 3.

If you do not have all these groups please contact your System Manager and ask to be added. Alternatively, you could create a System or Admin id which only uses these groups instead.

1. If you are importing contact details into Fund Manager, some fields are mandatory as part of the import process however you have the option of excluding all or some of the following information:
  - UPN Is the Unique Pupil Number allocated to each pupil (This option only applies to new customers)
  - Contacts Are the parent/guardian contact details for each pupil
  - Groups Are the groups that a pupil is linked to i.e. free school meals
  - Staff Are the staff members held in your MIS system
  - Attendance Is the pupil attendance records

**Note:** If you would prefer to exclude any of the items listed above from being imported into Fund Manager you must notify a member of the support team before you run MISapp.

2. MISapp does not automatically mark school leavers out of use. So before installing MISapp, mark any pupils and staff that have left the school as "Out of Use".
  1. Open Fund Manager > Administration > Manage Names.
  2. Locate the names in the list that you want to mark out of use and select the box to the left of each name.
  3. Under Batch Actions, select .Out of Use.
  4. Click Update Name(s).

For more information on how to manage names in Fund Manager please read [Manage Names](#).

# Chapter 3

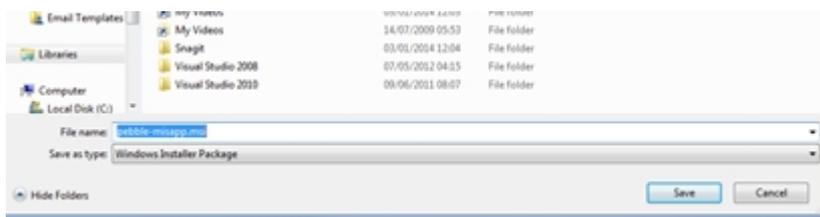
## Installing MISapp

You must have performed all preparation tasks before installing MISapp.

### Download MISapp program

1. Download the MISapp program, by clicking [MISapp download](#).
2. You can either click Run to run the installation directly from there or click Save to save the MISapp program to your server.

If you have rights you can save it to your server, otherwise select a location to which you have full access rights.



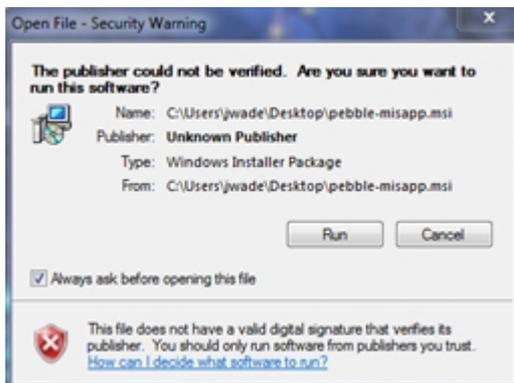
**Note:** We recommend that you install MISapp on your school server and your IT department is made aware of its installation and its need to be there. If it is installed on the server, then it won't matter which member of staff uses their PC to access your Pebble software.

## Install MISapp

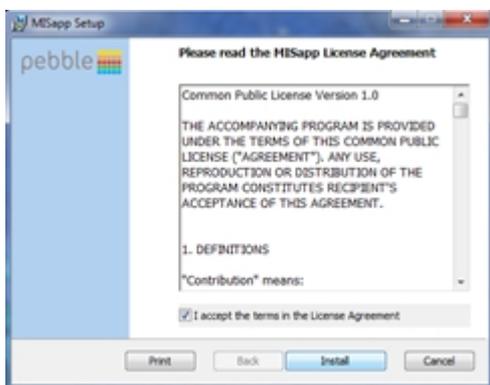
1. Go to the downloaded file location and start the installer by double clicking MISapp.msi file from your desktop (or other location in which it was saved).



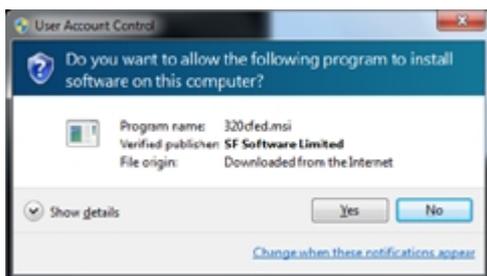
2. Click Run when you are prompted.



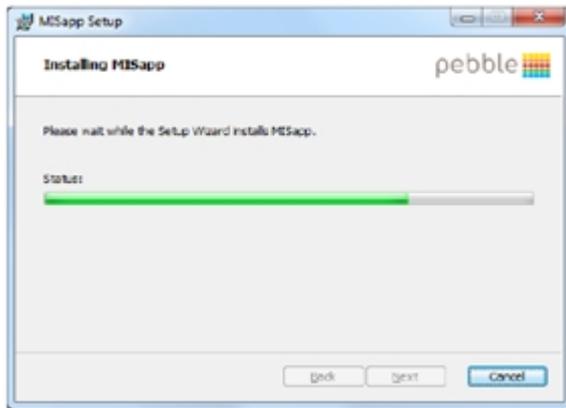
3. Accept the license agreement and click Install.



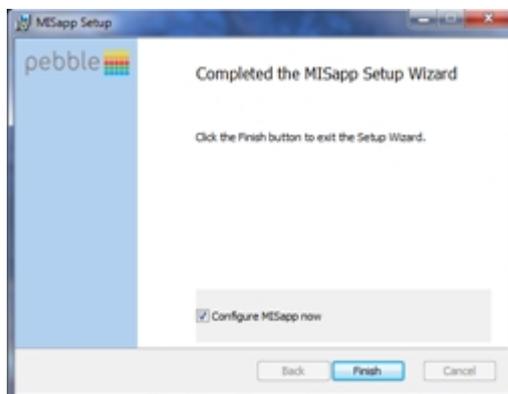
4. Click Yes on the following prompt.



5. Wait for installer to finish.



6. Once finished, click Finish.



7. MISapp is set to run afterwards and it opens at the Network tab by default.



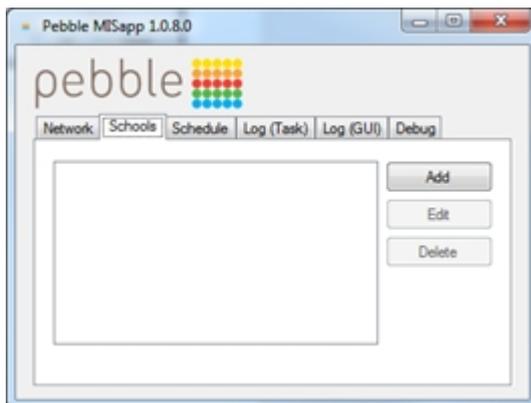
# Chapter 4

## Setting up Schools

You can add a number of schools if required, but you need to add them one at a time. This is especially useful for those schools with a central/hosted SIMS server.

### Adding school details

1. Select the Schools tab.



2. Click Add to add your School.

The screenshot shows a dialog box titled "School" with the following fields and buttons:

- Name:** A text box containing "The School Name".
- SIMS Information:**
  - User:** A text box containing "Your Sims.net id".
  - Password:** A password field with masked characters "\*\*\*\*\*".
  - Server:** A text box containing "school admin/sims server".
  - Database:** A text box containing "database location".
  - Test:** A button to the right of the Password field.
- Pebble Information:**
  - Email:** A text box containing "misapp@yourschoolname".
  - Password:** A password field with masked characters "\*\*\*\*\*".
  - Organisation:** A text box containing "???".
  - Test:** A button to the right of the Password field.
- Save:** A button at the bottom left.
- Cancel:** A button at the bottom right.

3. Enter the school Name.
4. Enter your SIMS Information.
  1. Enter your User. This is your SIMS.net id.
  2. Enter your SIMS Password.
  3. Enter your Server name and Database location.

MISapp will attempt to fill in the Server and Database fields automatically by reading the Sims connect.ini file. It is possible that the connect.ini file redirects to another connect.ini file on the server, and there may be multiple redirects. MISapp attempts to follow the redirects but might fail in some circumstances.

If this happens and the fields remain blank, you can look at the connect.ini file manually and follow the redirect to the correct SIMS file location. Check the MISapp Log (GUI) tab to see how far it got and the paths it was searching. Alternatively, use the default server and database names. These are (local)\sims2008 and SIMS respectively.

**Note:** Please seek your school's IT Support advice if you need help with your SIMS location settings.

4. Click Test alongside the SIMS Information.

The screenshot shows a 'School' configuration window. It has several sections: 'Name' with a text field; 'SIMS Information' with fields for 'User', 'Password', 'Server' (containing 'local/sims2008'), and 'Database'; a 'Test' button with the text 'Sims information correct' below it; 'Pebble Information' with fields for 'Email', 'Password', and 'Organisation'; and a 'Test' button below these. At the bottom are 'Save' and 'Cancel' buttons. A callout box on the right contains the text: 'When you have entered your SIMS Information Click Test' and 'If all the entries are correct you will see Sims information correct'.

If all the entries are correct you will see the message - Sims information correct. If the message shows anything different e.g. Sims information incorrect, or Missing Sims permissions, you may need to contact us so that we can assist you in getting set up.

If you see the message Missing Sims permissions, then the SIMS user may not have been added to the relevant groups as advised in [Preparation on page 5](#). Please ensure that it is a member of the following groups - Third Party Reporting, Class Teacher, Admin Assistant and Personnel Assistant.

If in doubt, please call us so that we may assist you.

5. Enter your Pebble Information.
  1. Enter your MISapp Email address (this has been sent to you in an email).
  2. Enter your MISapp Organisation ID (this has been sent to you in an email).
  3. Enter your Password.

**Important!** You will need to call us for this, if you have not done so already. Please call us on 0845 310 1788 option 3

6. Click Test alongside the Pebble Information.

This will connect MISapp to Pebble using the appropriate URL for your organisation. This will be <http://apps.mypebble.co.uk>.

It will show either Pebble information correct, Wrong username or password, Wrong organisation, or something else entirely.

**Tip:** If your **Username** and/or **Password** is incorrect, try to log into your Fund Manager program account without auto fill to prove that you have the correct **Username** and **Password**.

7. Once both tests have passed, click Save.

**Warning!** If you click Cancel this will leave the window without saving any of the details you have entered.

## Editing or deleting schools

- Select the school from the list of schools on the Schools tab and click Edit or Delete.

# Chapter 5

## Managing MISapp Tasks

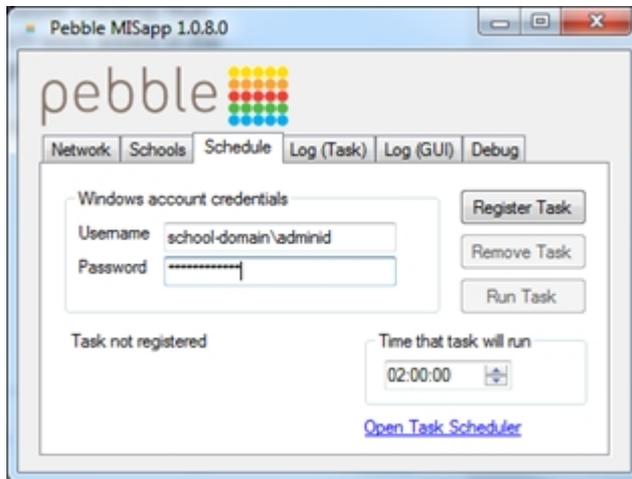
By default, MISapp is scheduled to run at 02:00 am every day.

You can schedule MISapp to run at a different time by changing the task time in MISapp, or you can run the task immediately if you are aware of SIMS updates and you want these reflected in Fund Manager immediately.

**Warning!** We recommend that you do not schedule MISapp to run around midnight because this is when SIMS updates.

## Set MISapp to run at a specific time

1. Select the Schedule tab.



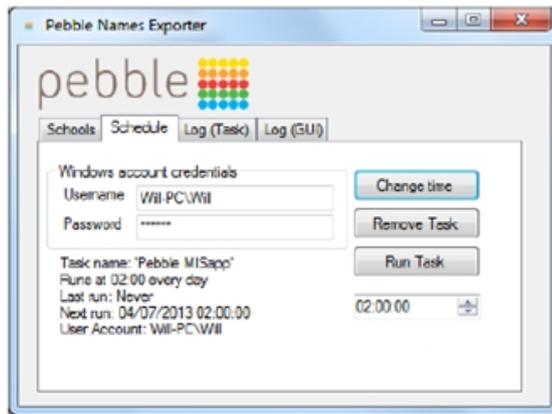
The current windows **Username** should automatically be filled in, but your **Password** needs to be entered.

**Tip** – This is the **Username** and **Password** you use to log on to your computer and/or your network, this means the user must have a password-protected windows account.

The password isn't saved on this tab, you will need to re-enter each time you wish to change the time.

2. The current Windows Username should automatically be filled in, but you will need to enter your Windows Password.
3. To change the time, scroll to the desired time and click Register Task.

This saves the new time for the task in MISapp. If the task was added successfully, it should look like the box below.



This Task will Run at 02:00 am by default.

Please do not Run the Task around midnight as generally this is when Sims updates.

4. Check at least 30 minutes after the scheduled task has run in the Log (Task) tab whether the MISapp reports have been run and data sent for all schools listed on the Schools tab. If the Log states data sent to pebble successfully and you receive no error messages, the data has transferred successfully. You will also be able to see updated pupils in Fund Manager.

**Tip:** We recommend that when you first register a task in MISapp that you use Run Task to ensure that the schedule is created and the reports are sent correctly.

## Unschedule a MISapp task

1. Select the Schedule tab.
2. Enter your Windows Password to access the Schedule tab.
3. Click Remove Task.

## Set MISapp to run on-demand

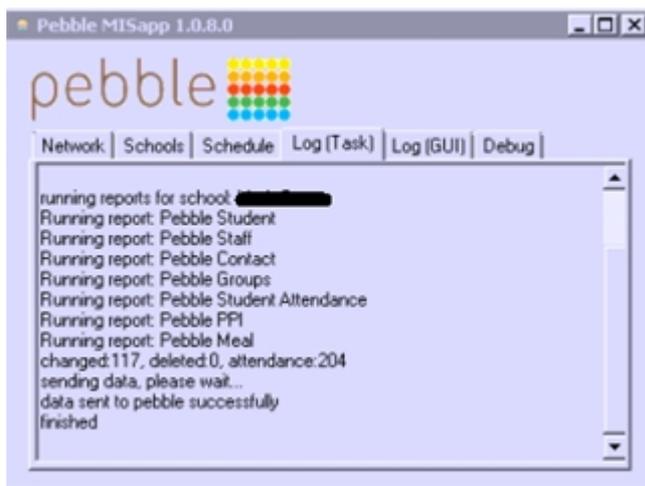
1. Select the Schedule tab.
2. Enter your Windows Password to access the Schedule tab.
3. Click Run Task.

The Log (Task) tab is displayed.

You can check here that the MISapp reports are being run and data is being sent for all schools that have been added on the Schools tab.

**Note:** This can take some time, depending on how much data there is to send - generally between 2 and 15 minutes.

4. Once the task has finished, the Log (Task) lists all the events that have run, as shown below.



If the Log states data sent to pebble successfully and you receive no error messages, the data has transferred successfully.

You will be able to see updated pupils in Fund Manager generally within 30 minutes.

# Chapter 6

## Troubleshooting

### MISapp isn't updating names

If MISapp fails to update names automatically in Fund Manager, this may be because your network server has been re-installed, moved or taken off-line completely.

The quickest way to correct this is to reinstall MISapp (see [Installing MISapp on page 7](#)) and configure MISapp (see [Setting up Schools on page 11](#) and [Managing MISapp Tasks on page 15](#)) as described in this guide.

**Note:** If you cannot remember your MISapp Email, Password or Organisation ID you will need to contact us to obtain these. You can do this by emailing [support@mypebble.co.uk](mailto:support@mypebble.co.uk).



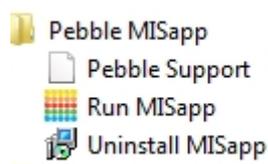
# Chapter 7

## Uninstalling MISapp

MISapp can be uninstalled from either Control Panel or from the Pebble Misapp program group in the start menu.

**Note:** This will not remove the Task, this must be done from the schedule tab in MISapp before uninstalling or from Scheduled Tasks.

A shortcut to the program and a link to Pebble's Support site can be found as shown below under Pebble MISapp from your start menu. (Windows versions with the Start menu).



You will also need to remove the Pebble folder from the hidden folder c:\programdata.

