End of Year
Using the CTF Match Screen
For School Administrative Staff

Contents

SIMS helping schools inspire
Accredited Support

Warwickshire County Council

Working for Warwickshire

Introduction

This handbook provides information on the steps necessary in importing the required data via a CTF.

The **Match and Import** panel on the **Import CTF** page enables you to examine the data stored in SIMS against the information in the CTF and decide which information should be imported.

NOTE: The data items contained in the CTF file have not changed.

The functionality provided by the **Match and Import** panel on the **Import CTF** page is entirely optional. If you do <u>not</u> wish to use this enhanced functionality, you can continue to import a CTF using the original method.

When using the **Match and Import** panel on the **Import CTF** page, you are strongly advised to use a screen resolution of 1280 x 1024.

In order to use the **Match and Import** panel, you must have Microsoft .NET Framework 4.0 installed.


Importing a Common Transfer File (CTF)

The CTF Matching routine enables you to define how a record in a CTF is imported into SIMS. It also enables you to select a record in the CTF that matches a record in your SIMS database then update the SIMS database with any missing details.

The method used to match a record in the CTF with a record in the SIMS database can be changed, enabling you to be as strict or as flexible as necessary.

The Core data (UPN, Surname, Forename, Gender and Date of Birth) is mandatory and is always imported.

1. Select **Routines / Data In / CTF / Import CTF** to display the **Select the CTF import type** dialog.
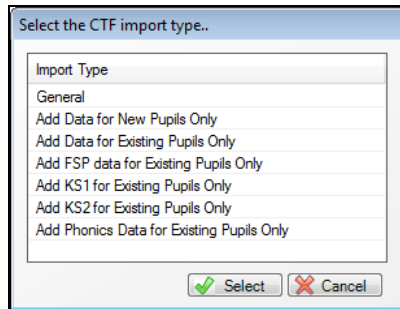
    This dialog enables you to create the following types of CTF:

    General - imports a full CTF export file.

    Add Data for New Pupils Only - imports data for pupil/students who do not already exist in SIMS.

    Add Data for Existing Pupils Only - imports data in the CTF for pupil/students who already exist in SIMS.

    Add FSP data for Existing Pupils Only - imports Foundation Stage Profiles data in the CTF for pupil/student who already exist in SIMS.

    Add KS1 for Existing Pupils Only - imports Key Stage 1 data in the CTF for pupil/students who already exist in SIMS.

    Add KS2 for Existing Pupils Only - imports Key Stage 2 data in the CTF for pupil/students who already exist in SIMS.

    Add Phonics Data for Existing Pupils Only - imports Phonics Test result data for pupil/student who already exist in SIMS.

    Note: Secondary schools in England are provided with additional options. The **Add ULNs for Existing Pupils Only** option imports only the ULNs for pupil/students who already exist in SIMS.

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2. Highlight the required CTF import type.

3. Click **Select**.

    A message will appear asking to confirm whether you wish to change the matching scale.
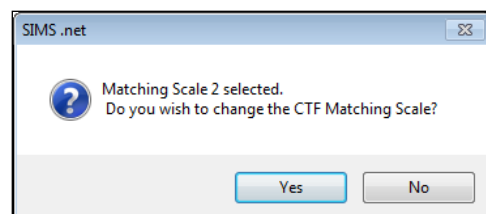
This message relates to the **Match and Import** panel on the **Import CTF** page, which enables you to examine the data stored in SIMS against the information in the CTF and decide which information should be imported.

The scale defaults to level **2**, indicating that the system will match on similar surname and forename.
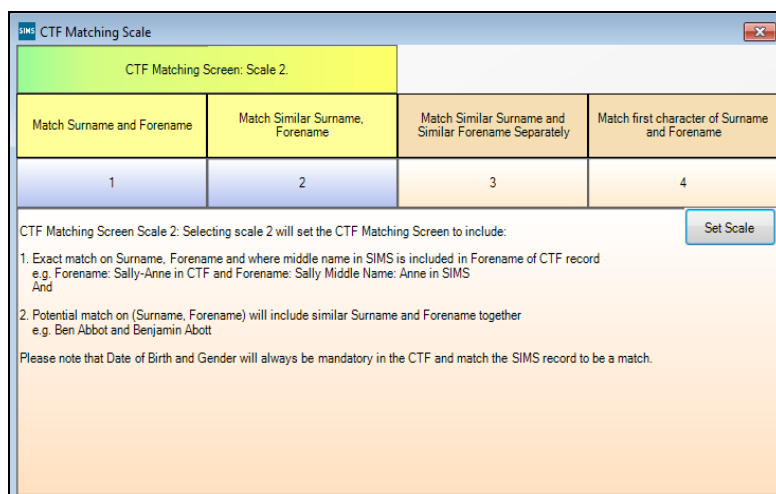
Selecting No:

4. If you wish to remain on level **2** of the matching scale, click the **No** button.

5. Import the CTF.

The page name is appended with the option selected in the previous dialog.

Selecting Yes:

6. To change the matching scale, click **Yes**.

The **CTF Matching Scale** dialog will appear.

This screen enables you to select the required scale from the following:

Scale 1	Match Surname and Forename
Scale 2	Match Similar Surname and Similar Forename
Scale 3	Match Similar Surname and Similar Forename Separately
Scale 4	Match first character of Surname and first character of Forename

The corresponding number indicates the level of matching you wish to carry out, with level 1 being the most strict and 4 being the most flexible.

7. Select the required matching scale by clicking the required heading.

8. Click the **Set Scale** butto to confirm the new matching scale.

Points to Consider Before Importing a CTF:

Data Category	Description
Student Basic Details	Not all ethnicity codes can be transferred between England and Wales. As some schools use Main ethnicity codes, this can affect the accuracy of the transferred ethnicity data. If the school that sends the CTF and the destination school use different ethnicity codes, SIMS attempts to find the closest match. The **Exception Log** displays any instances of inexact or failed matches.
SEN Information	Only SEN Statuses of **N - No Special Educational Need** or **S - Statement** transfer from schools in England to schools in Wales, and vice versa If the pupil/student already exists in SIMS and has a **SEN Status**, this may cause the data to not be imported from the CTF. If this is the case, a relevant entry is displayed in the **Exception Log**. If the pupil/student already exists in SIMS but the SEN statuses in SIMS and the CTF differ, SIMS assumes that the **SEN Status** with the most recent **Start Date** is correct. The status with the older **Start Date** then terminates the day before the **Start Date** of the more recent status. A message is displayed to confirm this. If the **SEN Status** in the CTF is not recognised in SIMS **Lookups**, then the data is not imported and an entry is recorded in the **Exception Log**. **SEN Needs** cannot be transferred between countries.

Selecting the CTF Import File

The categories of data that can be imported via CTF are displayed in the **Data to be Imported** panel. Any data item where the adjacent check box is selected indicates an item that will be imported by default.

When importing a CTF, the enrolment status in a pupil/student's school history is set to <null>.

1. Amend the default settings by selecting or deselecting the appropriate check box(es), if required.

   TIP: Hover the mouse over each check box to view a list of the data in each section, as shown in the following graphic.

2. Click the file brower button to select the CTF File you wish to import.

3. Navigate to and highlight the required CTF.

4. Click **Open**.

5. Select whether you wish to place the pupil into a **Pre-Admission** group or **On-Roll** from the drop-down list.

   If you wish to place them in a **Pre-Admission** group, highlight the required group in the table.

   If you wish to place them **On-Roll**, select an **Effective Date**.

If you leave the date as the default, CTF import creates membership information as of the day of import.

6.   Click the **Proceed For Match Import**.

The CTF Matching routine enables you to define how a record in a CTF is imported into SIMS. It also enables you to select records that matches a record in your SIMS database then update the SIMS database with any missing details.

The method used to match a record in the CTF with a record in the SIMS database can be changed, enabling you to be as strict or as flexible as necessary.

Note: The functionality provided by the **Match and Import** panel is entirely optional. If you <u>do not</u> wish to use this enhanced functionality, you can continue to import a CTF using the original method by clicking the **Import CTF** button in the **Match and Import** panel <u>without</u> making any changes in this panel.

CTF Matching Indicators

The **Match and Import** panel displays indicators that help you to identify whether the CTF record has any conflicts and shows how the pupil/student record will be imported into SIMS.

1. Click the **Indicator** link to display the **CTF Matching Indicators** dialog, which shows a detailed description of each indicator.
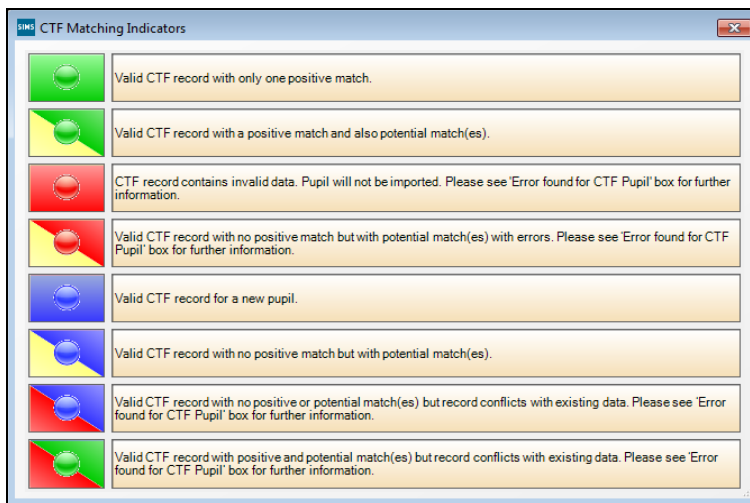
Exit the **CTF Matching Indicators** dialog to return to the **Match and Import** panel.

CTF Matching Scale

The **Match from following** panel includes a link that can be selected to show the **CTF Matching Scale**.

Two grids are displayed in the **Match from following** panel.

Positive Match – the record the CTF would match upon import if no action is taken.

Potential Matches – could display more than one potential match from either the pre-admission or on-roll records.
The cell you select in the **Match and Import** panel will determine what is displayed in the **Match from following** section on the right-hand side of the panel.

The users can agree with the system that the positive match is correct and leave as the **Selected Pupil** or they can double click on a potential match and then that match will become the **Selected Pupil** which is the CTF record that will be updated.

Additional Functionality

If you decide that the **Selected Pupil** and/or potential student/pupil(s) are incorrect matches, then right-click the **Selected Pupil** and select **Remove selection** to change the selection to a **New Pupil** or a **Conflicting Pupil**.

If you right-click the **CTF Pupil** column and select **Add as a new pupil**, the content of the **Selected Pupil** column changes from **Positive Match** or **Manual Match** to **New Pupil**.

If you right-click the **CTF Pupil** column and select **Do not import this pupil**, the selected pupil will not be imported.

The number under the symbol reflects the number of matches found. The first name in the grid is displayed in the pupil cell but all matches are displayed in the **Match from following** grid.
Refreshing

Clicking the **Refresh** button when data in SIMS has been changed affects the pupil/students in the **Match and Import** panel.

The following is an example of a change you may wish to make in the **Match and Import** panel.

Search for and highlight the required pupil/ then click the **Delete** button in the browser to delete the record.

Once the record has been deleted, click the `Back` button to return to the **Match and Import** panel and click the `Refresh` button to remove Dorman Aboud from the **Pre-Admission Pupil** column and allow the UPN to be imported against the admitted record upon import of the CTF.
There are two panels at the bottom of the **Import and Match** panel. The first panel contains information about the CTF pupil/student that is taken from the CTF file. These include:

UPN
Former UPN
Surname
Former Surname
Forename
DOB
Gender.

When you select a different pupil/student, the **CTF Pupil Details** panel changes.

The details in the second panel will differ depending on what cells you select.

If the pupil/student selected does not have any conflicting errors with SIMS, the following graphic is displayed.

	CTF Pupil Details			Details
Names	Details			No data found.
UPN	N919467903128			
Former UPN				
Surname	Aboud			
Former Surname				
Forename	Dorman			
DOB	20/02/2000			
Gender	M			

If the pupil/student selected has conflicting errors with SIMS then the **Error found for CTF Pupil** panel will be displayed.

	CTF Pupil Details			Error found for CTF Pupil	Edit Pupil
Names	Details		Names	Details	
UPN	E823432111004		Andrew_Abbot	UPN (E823432111004) not imported because it already exists for pupil Abbot, Andrew	
Former UPN					
Surname	Aboud				
Former Surname					
Forename	Dorman				
DOB	20/02/2000				
Gender	M				

If the pupil/student selected in the **Selected Pupil** column is admitted or has ever been admitted, the **Matched On-Roll Pupil Details** will be displayed.

	CTF Pupil Details			Matched On-Roll Pupil Details	Edit Pupil
Names	Details		Names	Details	
UPN	Q823432111003		UPN		
Former UPN			Former UPN		
Surname	Abbot		Surname	Abbot	
Former Surname			Former Surname		
Forename	Benjamin		Forename	Benjamin	
DOB	20/07/2000		DOB	20/07/2000	
Gender	M		Gender	M	
			Mismatch		

If you select a pupil/student in the **Selected Pupil** column and they are a pre-admission pupil then the **Matched Pre-admission Pupil Details** will be displayed.

	CTF Pupil Details			Matched Pre-Admission Pupil Details	Edit Pupil
Names	Details		Names	Details	
UPN	V823432114001		UPN		
Former UPN			Former UPN		
Surname	Abbot		Surname	Abbot	
Former Surname			Former Surname		
Forename	Francis		Forename	Francis	
DOB	23/03/2005		DOB	23/03/2005	
Gender	M		Gender	M	
			Mismatch		

If you select a pupil/student in the **Pre-Admission Pupil** column then the **Pre-Admission Pupil Details** box will be displayed.

	CTF Pupil Details			Pre-Admission Pupil Details	Edit Pupil
Names	Details		Names	Details	
UPN	N919467903128		UPN	N919467903128	
Former UPN			Former UPN		
Surname	Aboud		Surname	Aboud	
Former Surname			Former Surname		
Forename	Dorman		Forename	Doman	
DOB	20/02/2000		DOB	20/02/2000	
Gender	M		Gender	M	
			Mismatch		

If you select a pupil/student in the **Admitted Pupil** column then the **On-Roll Pupil Details** box will be displayed.

	CTF Pupil Details			On-Roll Pupil Details	
	Details			Details	
UPN:	A234234243243		UPN:	B823432110001	
Former UPN:			Former UPN:		
Surname:	Cameron		Surname:	Cameron	
Forename:	Stephen		Forename:	Stephen	
DOB:	02/12/1998		DOB:	02/12/1998	
Gender:	M		Gender:	M	
			Error found:	NOT IMPORTED : UPN (B823432110001) mismatch	

Running the Pre CTF Import Report

The Pre CTF Import Report can be run to indicate what exactly will happen if you decide to import the CTF.

Importing the CTF

When you are satisfied with the selections that you have made, you can import the CTF by clicking the **Import CTF** button.

The CTF is imported and the CTF Import Report is displayed, which explains what happens to the CTF pupil/student record once it is imported into SIMS. The report is saved in the Import CTF directory.

CTF Import Report - General

Security Message:	This report contains sensitive information.
CTF Filename:	D:\CTFs\2015\9194679_CTF_8234321_002.xml
Date Imported:	20/02/2015

Total Pupils: 3	**New Pupils:** 0	**Updated Pupils:** 3	**Not Imported Pupils:** 0

New Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender
-	-	-	-	-	-

Updated Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	SIMS Matched Pupil Surname	SIMS Matched Pupil Former Surname	SIMS Matched Pupil Forename
-	-	-	-	-	-	-	-	-

Updated Pre-Admission Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	SIMS Matched Pupil Surname	SIMS Matched Pupil Former Surname	SIMS Matched Pupil Forename
Aboud	-	Dorman	N919467903128	20/02/2000	M	Aboud	-	Dorman
Acoba	-	Ekwueme	P919467903312	09/01/2001	M	Acoba	-	Ekwueme
Acton	-	Vinal	B919467902687	25/12/1997	M	Acton	-	Vinal

Not Imported Pupils

CTF Surname	CTF Former Surname	CTF Forename	UPN	Date of Birth	Gender	Error Message
-	-	-	-	-	-	-

Exception Log

Once the CTF file has been imported, the **Exception Log** panel is displayed. This panel provides information on any errors that occurred during the import of the CTF file.

4 Exception Log						
Number of students in file: 61		Number of students processed: 61		Number of students not exported:	0	
UPN	Preferred Surname	Preferred Forename	Gender	Date of Birth	Error Description	File Name
B820200106061	Baker	Jade	F	01/04/2004	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
B820200106061	Baker	Jade	F	01/04/2004	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
B820200106061	Baker	Jade	F	01/04/2004	The 9th point for FSP CLL AS1 has b...	8232999_CTF_8234321_011
T820200106073	Davis	Jean	F	07/01/2004	The 9th point for FSP PSE AS3 has ...	8232999_CTF_8234321_011
J820432100043	Elliot	Gadfry	M	04/01/2005	Attendance data not exported as miss...	8232999_CTF_8234321_011
F820200106083	Jones	Joe	M	17/05/2004	The 9th point for FSP PSE AS2 has ...	8232999_CTF_8234321_011
C820200106081	Mugarisanwa	Sylivia	F	26/11/2003	SEN status of S, P, E or K has been tr...	8232999_CTF_8234321_011
L820200107041	Wise	James	M	27/05/2004	No MAT Results exported since ther...	8232999_CTF_8234321_011
L820200107041	Wise	James	M	27/05/2004	No MAT Results exported since ther...	8232999_CTF_8234321_011

Save
Print