

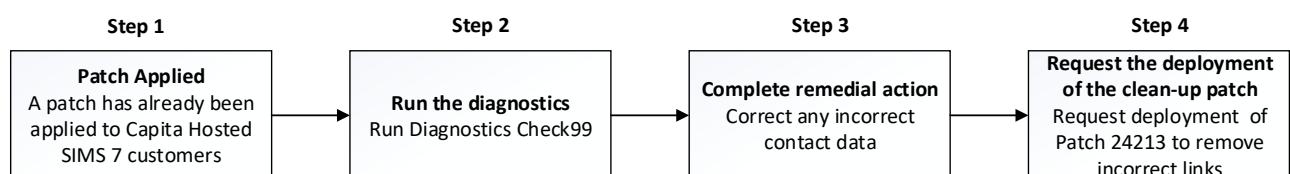
CTF 17/18 Import Contact Issue – Capita Hosted SIMS7 Customers

Document purpose

This document describes a four-step process required to identify and correct contact information which may have been incorrectly updated because of running a CTF import.

This document is intended to address Capita Hosted SIMS 7 customers.

Customers who have an on-premise deployment of SIMS 7 or take a non-Capita Hosted SIMS service should read [this document](#) or contact your usual SIMS support organisation.



Step 1 – Hosted SIMS 7 customers have had the patch applied

Capita hosted SIMS customers are already on the SIMS 2018 Summer Release (7.182) and the “Summer 2018 workstation patch 1” was applied on Friday 17th August 2018.

Note: Any local on-premise SIMS 7 workstation installations (for example for 3rd party connector purposes) are updated to “Summer 2018” and “Summer 2018 Workstation Patch 1” via the “Hosted Services Update” service.

Step 2 - Run the diagnostics

- A part of the patch (applied in Step 1) an extra check “Check 99” has been added to Database Diagnostics which is run from within the SIMS.
- As a user with System Manager permissions:
 - Navigate to **Tools | System Diagnostics | Database Diagnostics**.
 - Click **Run**.

Note that this routine can take time to complete and should ideally be done at times of the day of low activity.

- Any output from Check 99 appears in red. If there is no output then no corrective action is required, and you can continue to “Step 4 – Run the clean-up patch” at the end of this document.
- Click **Print**. The output will be displayed in a new window.
- From the new window click **Save** and change the save file type **All file (*.*)**
- Name the file **Check99output.CSV**

Further Database Diagnostics information can be found in the following [presentation](#)

Limitations

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Note that Check 99 does not identify incorrect data included in a CTF file received from another school where that school has not made the necessary data corrections.

This may have occurred where a student has moved school more than once since April 2017.

If you believe you have sent a CTF containing incorrect information to another school, we recommend that you contact the recipient school to advise on the affected students or applicants.

One method of identifying such students or applicants is to filter the Check 99 output for leavers where these students may have been exported to another school via CTF.

Step 3 – Complete remedial action (if appropriate)

The following issues are listed in the “potential issue” column in the Check 99 output.

Issue 1: Possible contact link issues

Scenario

An applicant or student has been linked to the incorrect contact of another applicant, past or present, whose name, gender and relationship all matched. This could be a parent, carer, social worker or any other contact relationship type.

Additionally, it may have overwritten the address and updated the existing record with additional email addresses and telephone numbers if present in the CTF.

How have names been incorrectly linked?

This would happen if a combination of the name, title, gender and relationship of a pupil’s contact record in the CTF matched the same elements of the contact of another applicant, on-roll pupil or leaver already held in the SIMS database.

One type of example would be:

Current pupil in SIMS database

Pupil = Joanne Bradshaw, with a Contact/Parent = Wendy Bradshaw, Mother, Female (original)

New CTF applicant

Pupil = Jamie Bradshaw, with a Contact/Parent = Wendy Bradshaw, Mother, Female (new/different Wendy)

In this instance as both pupils have a parent called Wendy Bradshaw, identified also as being Female and with a relationship of Mother, the new CTF applicant would be linked to the original Wendy Bradshaw. The original Wendy Bradshaw address, telephone number and email would also be updated with the new/different Wendy Bradshaw’s details.

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Recommended solution

Note: Please ensure the prerequisites at the start of this document have been met before continuing.

- Navigate to **Focus | Person | Contact** and search for the contact record shown in the Check 99 output. This may return more than one possible match.
- Alternatively, use the Quick Search facility on the SIMS **Home Page** by entering the Contact ID from the output between braces { } e.g. {123}. This will display the contact name where you can double-click to open the record.

Note: The address on the contact record may have been overwritten and additional email addresses and phone numbers may have been added. Panel 4 **Associated Students** within the **Contact** record may assist in identifying the correct data. This should be checked against any existing records e.g. paper copies or previous data collections. If in doubt we recommend collecting the data again to ensure it is correctly updated.

- The student/applicant status column on the output from Database Diagnostics Check 99 will advise whether the contact is linked to an on roll student, a leaver or an applicant and any application status.
- Current applicants, admitted applicants, on roll students and leavers can be deleted from Panel 4 **Associated Students** within the **Contact** record.

Note: Removing incorrect contact links via **Focus | Student | Student details** will not remove any contact links associated with the student and applicant, as they are no longer accessible.

- Once the contact data has been checked (and removed or updated manually), and any incorrectly associated applicants/students have been removed, you can re-import the CTF. The new contact record will be created from the data in the CTF and the applicant or student will be linked.
- Alternatively, the new contact can be created manually from Panel 5 **Family/Home Details** on the applicant or student record. Ensure that you select **New** and do not match any existing contact record.

Issue 2: No Current Address

Scenario

Contact addresses in SIMS have incorrectly been given an end-date after importing a CTF.

Causes

- Importing a CTF for applicants containing contacts multiple times on the same day.
- Importing a CTF for existing applicants in SIMS where the CTF file contains contacts without addresses.

Recommended solution

Check the contact address details against any existing records e.g. paper copies or previous data collections. If in doubt we recommend collecting this data again to ensure that it is correctly updated.

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Step 4 – Request the deployment of the clean-up patch (Patch 24213)

Please ensure that the above steps have been completed and any identified contact data has been checked and remedial action taken (if or where appropriate).

- Capita hosted customers can request the deployment of Patch 24213 using this [email form](#).
- This script will clean-up back-end applicant data associated with step 3.

The Capita SIMS 7 Hosted team will deploy Patch 24213 during the next available maintenance window and you will receive a confirmation email once complete.

Note: Patch 24213 does not need to be deployed to any local on-premise SIMS 7 workstation installations.