

SIMS Housekeeping Routines

Merging Agencies

Over time, duplicate agents and agencies may be present in SIMS, perhaps where data has been inadvertently recorded twice.

You can merge the information stored against duplicate agencies (including linked agents and pupil/students) or agents (including linked agencies, pupil/students and documents). Once merged, the duplicate agency or agent records will be removed from SIMS.

IMPORTANT NOTE: The merging of duplicate agents or agencies is permanent. Therefore, you are strongly advised to carry out a full backup of your SIMS system before proceeding.

If you wish to merge agencies, they must have the same agency type, e.g. **Medical**, **Social Services**, etc.

1. Select **Tools | Housekeeping | Merge Agencies** to display the **Merge Agencies** page.

2. In the **Options** panel, the **Copy Agent links** and **Copy Student links** check boxes are selected by default. Deselect these check boxes, if required.
 - **Copy Agent links** – merges any agents associated with the agency. They will be displayed in the **Linked Agents** panel.
 - **Copy Student links** – merges any pupil/students who are linked to the agency. They are displayed in the **Linked Students** panel.

IMPORTANT NOTE: If you elect not to merge agents into the main agency, you should ensure that, either before or after merging, the agents are assigned to another agency.

In the **Main Agency** panel, select the agency you wish to retain by clicking the **Open** button to display the **Select Agency** browser.

3. Search for the required agency, highlight its name then click the **OK** button. The details of the agency (the **Agency Type**, **Address**, etc.) are displayed, together with any **Linked Agents** and **Linked Students**. These details can be hidden by clicking the related **Hide Details** hyperlink. This is a toggle function and can be used to alternate between hidden and displayed details. Alternatively, each section can be hidden by clicking the section title, e.g. **Basic Details**. Click the hyperlink again to show the details.
4. Select the agency you want to merge with the main agency by clicking the **Open** button in the **Agency to be merged** panel. The agency details are displayed in the same way as the main agency.
5. Print the agency details by clicking the **Print** button, if required.
6. When the correct agencies are selected, click the **Merge** button to merge the information. You are prompted to confirm that you wish to continue. The merge process is irreversible, so click the **Yes** button only if you are certain that you wish to merge the agencies.

Any agents or pupil/students linked to the agency that you are merging (minor agency) will be linked to the main agency. The **Linked Agents** and **Linked Students** panels for the main agency will be updated to show any merged agents and/or pupil/students.

Merging Agents

When merging agents, any other role that an agent has will be retained. Only their roles as agents will be merged.

For example, an agent may also be recorded in SIMS with the role of contact but the contact record will not be merged, only the duplicated agent roles. Check the **Other Roles** panel when merging.

1. Select **Tools | Housekeeping | Merge Agents** to display the **Merge Agents** page.

2. In the **Options** panel, the **Copy Agent links**, **Copy Student links** and **Copy Documents** check boxes are selected by default. Deselect these check boxes, if required.
 - **Copy Agent links** – merges any agencies with which the agent is associated. These are displayed in the **Linked Agencies** panel.
 - **Copy Student links** – merges any pupil/students who are linked to the agent. These are displayed in the **Linked Students** panel.
 - **Copy Documents** – merges any documents currently attached to the source agent, with the main agent.
3. In the **Main Agent** panel, select the agent you wish to retain by clicking the **Open** button to display the **Select Agent** browser.
4. Search for the required agent, highlight their name then click the **OK** button. The agent's details (**Address** and **Telephone**) are displayed, together with any **Linked Agencies** and **Linked Students**. Any other roles held by the agent are displayed in the **Other Roles** panel. For example, they could also be a contact, pupil/student or member of staff.

These details can be hidden by clicking the related **Hide Details** hyperlink. This is a toggle function and can be used to alternate between hidden and displayed details. Alternatively, each section can be hidden by clicking the section title, e.g. **Other Roles**. Click the hyperlink again to show the details.
5. In the **Agent to be merged** panel, select the agent whose details you want to merge with the main agent by clicking the **Open** button to display the **Select Agent** browser. Refer to step 4 for information on selecting and displaying the required agent.
6. Details of the agents you intend to merge can be printed for reference purposes, if required, by clicking the **Print** button on the toolbar.
7. If you wish to continue, click the **Merge** button on the toolbar to merge the agent details. Click the **Yes** button when prompted to confirm the merge. The merge process is irreversible so click the **Yes** button only if you are certain that the agents should be merged.

Any linked agencies, students and/or documents will be merged with the new agent, if selected. The **Linked Agencies** and **Linked Students** panels for the main agent will be updated to show any merged agents and/or pupil/students.

SIMS Housekeeping Routines

Deleting Unlinked Contacts

This routine enables you to delete contacts (e.g. siblings, agents, etc.) who are no longer linked to a pupil/student or applicant in SIMS.

Unlinked contacts might exist because:

- the pupil/student has been deleted from SIMS.
- the link has been broken. This usually occurs when a contact is removed from family links.
- the contact is no longer required, e.g. they have moved away from the area.

Contacts who are linked to pupil/students who have left the school cannot be deleted, even if they have no links to current pupil/students.

IMPORTANT NOTE: You are strongly advised to carry out a backup before proceeding.

- Select **Tools | Housekeeping | Delete Unlinked Contacts** to display the **Find Unlinked Contacts** browser.

- Enter the required search parameters then click the **Search** button to display the matching contacts.
- Highlight the name(s) of the contact(s) you wish to delete, using the **Ctrl** or **Shift** key to highlight multiple contacts.
- Click the **Select** drop-down button then **All** or **Selected** to indicate the contacts you wish to delete. The selected contacts are displayed in the **Contacts to be deleted** panel of the **Unlinked Contacts to be deleted** page.
- Contacts can be removed from the list by highlighting their name in the **Contacts to be deleted** panel then clicking the **Remove** button.
- A list of contacts you intend to delete can be produced for reference purposes, if required, by clicking the **Print** button.
- Click the **Delete** button to delete the selected unlinked contact(s).
- Click the **Yes** button when prompted to confirm the deletion.

Deleting Old CTF Files

When CTF files are exported, an XML export file is created and stored in the CTF export directory that was specified when the CTF defaults were set (via **Tools | Setups | CTF**). Each XML file has a unique name when viewed through Windows® Explorer.

The first seven digits of the filename are your Local Authority (LA) number and your establishment number as the sending school. The other seven digits represent the LA and establishment number of the receiving school.

Over time, a number of files may have been created that are no longer required. In Windows Explorer, navigate to the CTF export directory and delete any files that are no longer required, using the **Date Modified** column to determine which files should be kept.

Running the Name Format Tidy

Name format changes can be applied to a combination of pupil/student/applicants, staff, contacts and agents or globally, as required.

- Select **Tools | Housekeeping | General** to display the **Housekeeping** page.
- In the **Name Format** panel, select the **Apply To** check box for each group to which the name case changes apply.
- Select either the **UPPERCASE** or **Title Case** radio buttons adjacent to the particular name you wish to change. Any changes made are reflected in the **Example**, enabling you to preview the selected name format before applying any changes.
- Click the **Apply** button to update the selected name format(s).

Resetting Parental Ballot Flags

All parents who have a child registered as on-roll at the school are eligible to stand for election when there is a vacancy for a parent governor. The term 'parents' includes natural parents and anyone else with parental responsibility.

The **Parental Ballot** check box can be selected via **Focus | Pupil (or Student) | Pupil (or Student) Details** when adding new **Contacts** or editing existing ones. Deselect the check box if the contact is not eligible.

- Select **Tools | Housekeeping | General** to display the **Housekeeping** page.

- In the **Reset Parental Ballot Flags** panel specify the **Effective Date** by clicking the **Calendar** button and selecting the date. Select the **Include accepted pre-admission students due to be on roll on the effective date?** check box if you would like to reset all applicant's contacts in addition to other pupil/students' contacts with parental responsibility.
- Click the **Apply** button to reset the parental ballot flags.

Updating the Mailing Point

To identify the child considered to be the mailing point for the family, select the **Mailing Point** check box via **Focus | Pupil (or Student) | Pupil (or Student) Details - Family/Home** panel.

Only one child should be designated as the mailing point. If a brother and sister live at different addresses, they should both be considered as a possible mailing point for their home address.

- Select **Tools | Housekeeping | General** to display the **Housekeeping** page.

- In the **Update Mailing Point** panel, specify the **Effective Date** by clicking the **Calendar** button and selecting the date. Choosing an effective date in the future enables the school administrator to set which pupil/student/applicant will be used as their family's mailing point for the forthcoming academic year.
- The **Mailing Point** defaults to **Oldest Child** but can be changed to **Youngest Child**, if required.
- Click the **Apply** button to update the mailing points.

This guide is based on the version of the software (7.136) in use at the time of publication.

© Capita Business Services Ltd 2010. All rights reserved.
No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated or transmitted without the express written consent of the publisher.

Capita Children's Services, Franklin Court,
Priory Business Park, Stannard Way, Bedford, MK44 3JZ

Tel: 01234 838080 <http://www.sims.co.uk>

SIMS