

Using the CTF Matching Screen

This Quick Reference Sheet provides information on the steps necessary to import data via a Common Transfer File (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.

IMPORTANT NOTES: The functionality provided by the **Match and Import** panel on the **Import CTF** page is entirely optional. If you do not wish to use this enhanced functionality, you can continue to import a CTF without using the matching scales.

When using the **Match and Import** panel on the **Import CTF** page, you are strongly advised to use a screen resolution of 1280x1024.

To use the **Match and Import** panel, you must have Microsoft .NET Framework 4.0 installed. This can be downloaded from the Microsoft® website (<http://www.microsoft.com>).

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 and 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.

IMPORTANT NOTES: You are strongly advised to run the **Address Tidy** and **Merge** routine before importing or exporting a CTF to reduce the number of potential issues with regard to address matching.

Any pupil/student records where the reason for leaving is recorded as **Deceased** are not imported.

1. Select **Routines | Data In | CTF | Import CTF** to display the **Select the CTF import type** dialog.

2. Highlight the required CTF import type then click the **Select** button to display a message asking you to confirm whether you wish to change the matching scale.
3. The scale defaults to level **2**, indicating that the system will match on similar surname and forename.

If you want to remain on level **2** of the matching scale, click the **No** button to display the **Import CTF** page then import the CTF. The page name is appended with the option selected in the previous dialog. To change the matching scale, click the **Yes** button to display the **CTF Matching Scale** dialog.

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

- Scale **1** - Match Surname and Forename
- Scale **2** - Match Similar Surname, Forename
- Scale **3** - Match Similar Surname and Similar Forename Separately
- Scale **4** - Match first character of Surname and Forename.

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

The following table demonstrates the ranges of flexibility:

Name In SIMS	Name In CTF	Matching Level			
		1	2	3	4
John Smith	John Smith	✓	✓	✓	✓
John Smith	John Smyth	✗	✓	✓	✓
John Smith	Joe Smith	✗	✗	✓	✓
John Smith	Jack Saunders	✗	✗	✗	✓

4. Select the required matching scale by clicking the required heading (e.g. **Match Surname and Forename**) or the required level number (e.g. **1**).

Clicking the required matching scale displays more detailed information on the selected scale in the panel below.

5. Confirm that you want to implement the new matching scale by clicking the **Set Scale** button to display the **Import CTF** page.

TIP: The matching scale can be changed later in the process via the **Match and Import** panel on the **Import CTF** page.

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.

NOTES: The data items that will be imported by default are defined on the **Configure CTF Defaults** page (via **Tools | Setups | CTF**).

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

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

Using the CTF Matching Screen

Selecting the CTF Import File (cont.)

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

1 Data to be Imported

Student Basic Details	☒	Student Address	☒	Student Contact	☒
SEN Information	☒	Includes the following:		History	☒
Attendance Summary	☒	UPN Unique Learner Number Former UPN Preferred Surname		Story	☒

2 Import Selection

1. Select the CTF file you want to import by clicking the **File Browser** button in the **Import Selection** panel to display the **Select Import File** dialog.
2. Navigate to and highlight the required CTF file, then click the **Open** button to return to the **Import CTF** page.
3. Select whether you wish to place the pupil/students contained in the CTF file into a **Pre-Admission** group or **On-Roll** from the **Place new pupils in** 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** (i.e. place them on-roll as of this date) by clicking the **Calendar** button then selecting the required date.

2 Import Selection

CTF File: C:\CTFs\9194679_CTF_8234321_001.xml

Place new pupils in: On-Roll Effective Date: 15/10/2015

You might wish to enter an earlier date if, for example, the CTF is received after the pupil/student has been admitted to the school. If the CTF is imported after the pupil/student has been admitted, their group memberships will commence as of the current date. Selecting an earlier date, i.e. when the pupil/student arrived at the school, enables the group memberships to be set accurately and without the need for manual intervention.

If you leave the date as the default, CTF import creates membership information (e.g. ethnic, religion, etc.) for an on-roll pupil/student as of the day of import, meaning you must change these membership dates manually to make them accurate, if required.

4. With the correct options selected, click the **Proceed For Match Import** button to display the **Match and Import** panel.

3 Match and Import

This Match and Import screen is used to match pupils in the CTF import file and SIMS. The CTF file can be imported at any point of the matching process. When the CTF is being imported, the matches identified in the 'Selected Pupil' column will be applied. When you are ready to import the CTF file, click the 'Import CTF' button at the bottom of the page.

Indicator	CTF Pupil	Pre-Admission Pupil	Admitted Pupil	Selected Pupil
	Dorman_Aboud	No data found	[1] Dorman_Aboud	Dorman_Aboud
	Ekvume_Acoba	[1] Ekvume_Acoba	[2] Ekvume_Acoba	Ekvume_Acoba
	Vinal_Actor	No data found	No data found	Invalid Pupil

Matching Pupil/Students and Importing the CTF File

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.

IMPORTANT NOTE: The functionality provided by the **Match and Import** panel is entirely optional. If you do not wish to use this enhanced functionality, you can continue to import a CTF without using the matching scales by clicking the **Import CTF** button in the **Match and Import** panel without 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.

Click the **Indicator** link to display the **CTF Matching Indicators** dialog, which shows a detailed description of each indicator.

CTF Matching Indicators

- Valid CTF record with only one positive match.
- Valid CTF record with a positive match and also potential match(es).
- CTF record contains invalid data. Pupil will not be imported. Please see 'Error found for CTF Pupil' box for further information.
- Valid CTF record with no positive match but with potential match(es) with errors. Please see 'Error found for CTF Pupil' box for further information.
- Valid CTF record for a new pupil.
- Valid CTF record with no positive match but with potential match(es).
- Valid CTF record with no positive or potential match(es) but record conflicts with existing data. Please see 'Error found for CTF Pupil' box for further information.
- Valid CTF record with positive and potential match(es) but record conflicts with existing data. Please see 'Error found for CTF Pupil' box for further information.

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 (View CTF Matching Scale For Potential Matches)**.

NOTE: The **CTF Matching Scale** is read-only. Any changes will need to be made by re-opening the **Import CTF** page by selecting **Routines | Data In | CTF | Import CTF**.

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.
- If you select a cell in the **CTF Pupil** column, all potential matches (whether on-roll or pre-admissions) will be displayed in the **Match from following** section on the right-hand side of the panel.
 - If you select a cell in the **Pre-Admission Pupil** column then only pre-admission potential matches will be displayed.
 - If you select a cell in the **Admitted Pupil** column then only the admitted potential matches will be displayed.
 - If you select a cell in the **Selected Pupil** column then on-roll and pre-admission pupils will be displayed.

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

CAPITA

Capita SIMS, Franklin Court, Priory Business Park, Cardington, Bedfordshire MK44 3JZ
Tel: 01234 838080 Fax: 01234 832036 Email: info@capita-sims.co.uk Web: www.capita-sims.co.uk

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Version 7.174 - 1.0

Release Date: 27/02/2017