

How to Identify and Correct Data Impacted by the CTF Import Incident

Prerequisites

Please ensure that patch 24068 has been applied OR that the SIMS7 database has been upgraded to the Summer 2018 release version 7.182 before attempting any corrective action.

Please then apply patch 24157 to enable a new check in the Database Diagnostics routine which will identify any data items to be reviewed.

Please note that some data identified may be correct but that it should still all be checked.

If further assistance is required please contact the SIMS Support Desk.

Hosted SIMS

If your SIMS database is hosted by Capita please note that patch 24068 and patch 24157 have been applied for you.

How do I run Database Diagnostics?

- Within SIMS please go to the following menu route: Tools | System Diagnostics | Database Diagnostics.
- and click on “Run”.

Please note that this routine may take some time to complete and can only be run by a user with System Manager permissions.

Which check number identifies the data concerned?

Check 99 has been added for this purpose. It will show in red even if there are no results because of the format of the output that has been used. If only the header row appears with no data beneath this then are no issues identified and your records are unaffected.

How can I save the output?

This can be printed or copied and pasted into a document to work through any items raised against Check 99 only.

If further information is needed in relation to running Database Diagnostics or saving the output into a different format there is a PowerPoint presentation available on MyAccount to assist with this process. The link can be found within the CTF Newsfeed update added on 17/07/18.

<http://myaccount.capita-cs.co.uk/Notifications/sims-newsfeed-ctf-17-england-wales/>

How do I correct the data?

There are several different scenarios that may have occurred. Each one is described below with the relevant resolution.

Potential Issues

1) “Incorrect Contact Address” OR “Contact Tel No” OR “Require New Contact”

This indicates that an applicant has been linked to the incorrect contact of another applicant, past or present, whose name, gender and relationship all matched. Additionally, it will have overwritten the address and updated the record with additional extra email addresses and telephone numbers if present in the CTF.

Please note that “Name” is usually Forename and Surname but if the CTF has only an initial where it should have a full Forename then it will have been matched to the first person with a name beginning with that Initial and the same Surname in the SIMS database. The same applies if the CTF has a full Forename and Surname but an exact match is not found in the SIMS database, then it has used Initial and Surname to match. The names are not updated in either scenario.

- Within SIMS please go to Focus | Admission | Application.
- Please check the application status in Panel 2 Registration Details.

1a) If the application status is Applied, Offered, Accepted, Rejected, Reserved or Withdrawal please follow the steps below.

- Search for, and open, the record for the applicant whose name appears in the output.
- Go to Panel 5 Family/Home Details.
- Select the contact also identified in the output, with a single click to highlight that line.
- Click the delete option on the right-hand side and save the record.

Please note that this removes the link between the applicant and the contact but does not delete the contact record.

- To now find the contact record please use the Quick Search facility on the homepage by entering the ContactID from the output between { } e.g. {123}. This will display the contact name which you can double-click to open the record.
- (Alternatively you can go to Focus | Person | Contact to search for the contact record but this may bring up more than one possible match.)

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 may assist you to identify the correct data. This should be checked against any existing records you may have access to i.e. any paper copies or previous data collections. If in any doubt we would recommend collecting the data again to ensure that it is correctly updated.

- Once the contact data has been checked, and removed or updated manually as per the above guidelines, AND you have either applied patch 24068 or updated to the SIMS Summer 2018 release, you may re-import the CTF. This will then create the

new contact record correctly from the data in the CTF and link the applicant to this new record.

- Alternatively, the new contact may be created manually from within Panel 5 Family/Home Details on the applicant record. Please ensure that you select “New” and do not match to any existing contact record.

1b) If the application status is Admitted please follow the steps below.

- Please use the Quick Search facility on the homepage to find the contact identified in the output by entering the ContactID between { } e.g. {123}. This will display the contact name which you can double-click to open the record.
- (Alternatively you can go to Focus | Person | Contact to search for the contact record but this may bring up more than one possible match.)
- Go to Panel 4 Associated Pupils / Students.
- Select the applicant also identified in the output, with a single click to highlight that line.
- Click the delete option on the right-hand side.

The following message will appear:

“Are you sure that you want to unassign this associated student?”

- Please click on “Yes”.
- This will remove the link but will not delete the application record.
- The contact address may have been overwritten and additional email addresses and phone numbers may have been added.

Panel 4 Associated Students may assist you to identify the correct data. This should be checked against any existing records you may have access to i.e. any paper copies or previous data collections. If in any doubt we would recommend collecting the data again to ensure that it is correctly updated.

- Once the contact data has been checked, and removed or updated manually as per the above guidelines, AND you have either applied patch 24068 or updated to the SIMS Summer 2018 release, you may re-import the CTF. This will then create the new contact record correctly from the data in the CTF and link the applicant or on roll student to this new record.
- Alternatively, the new contact may be created manually from within Panel 5 Family/Home on the on roll pupil / student record. Please ensure that you select “New” and do not match to any existing contact record.

2) Incorrect Contact Link

This indicates that an applicant or on roll student is flagged as being incorrectly linked to the contact of a leaver where the existing contact has the same name, title and gender, and additionally there was no address information for the contact in the CTF.

Please note that “Name” is usually Forename and Surname but if the CTF has only an initial where it should have a full Forename then it will have been matched to the first person with a name beginning with that Initial and the same Surname in the SIMS database. The same applies if the CTF has a full Forename and Surname but an exact match is not found in the SIMS database, then it has used Initial and Surname to match. The names are not updated in either scenario.

No address or other data will have been overwritten but the record will have been updated with additional extra email addresses and telephone numbers if present in the CTF. You will need to delete any incorrect information and either leave this blank or go back to the leaver record to compare with the data held there and update if certain that this is correct.

2a) If the pupil / student identified in the output is on roll OR is an applicant who has now been admitted

- Please use the Quick Search facility on the homepage to find the contact identified in the output by entering the ContactID between { } e.g. {123}. This will display the contact name which you can double-click to open the record.
- (Alternatively you can go to Focus | Person | Contact to search for the contact record but this may bring up more than one possible match.)
- Go to Panel 4 Associated Pupils / Students.
- Select the pupil / student who has been incorrectly linked, as identified in the output, with a single click to highlight that line.
- Click the delete option on the right-hand side.

The following message will appear.

“Are you sure that you want to unassign this associated student?”

- Please click on “Yes”.
- This will remove the link but will not delete the application or on roll pupil / student record.
- Please check as per the guidance at the start of this section, that the data for the contact has NOT been manually updated i.e. it does NOT match the on roll pupil / student or applicant that has been unlinked.
- Once the contact data has been checked, and removed or updated manually as per the above guidelines, AND you have either applied patch 24068 or updated to the SIMS Summer 2018 release, you may re-import the CTF. This will then create the new contact record correctly from the data in the CTF and link the applicant to this new record.

- Alternatively, the new contact may be created manually from within Panel 5 Family/Home on the on roll pupil / student record. Please ensure that you select “New” and do not match to any existing record.

2b) If the applicant identified in the output has an application status of Applied, Offered, Accepted, Rejected, Reserved or Withdrawal please follow the steps below.

- Within SIMS please go to Focus | Admission | Application.
- Search for, and open, the record for the applicant whose name appears in the output.
- Go to Panel 5 Family/Home Details.
- Select the contact also identified in the output, with a single click to highlight that line.
- Click the delete option on the right-hand side and save the record.

Please note that this removes the link between the applicant and the contact but does not delete the contact record.

- To now find the contact record please use the Quick Search facility on the homepage by entering the ContactID from the output between { } e.g. {123}. This will display the contact name which you can double-click to open the record.
- (Alternatively you can go to Focus | Person | Contact to search for the contact record but this may bring up more than one possible match.)
- Please check as per the guidance at the start of this section, that the data for the contact has NOT been manually updated i.e. it does NOT match the applicant that has been unlinked.
- Once the contact data has been checked, and removed or updated manually as above, then as long as you have either applied patch 24068 or updated to the SIMS Summer 2018 release, you may re-import the CTF. This will then create the new contact record correctly from the data in the CTF and link the applicant to this new record.
- Alternatively, the new contact may be created manually from within Panel 5 Family/Home Details on the applicant record. Please ensure that you select “New” and do not match to any existing record.

3) No Current Address

This indicates that a CTF was for some reason imported into SIMS twice in one day. Because of this an end date was incorrectly placed on the address of the contact identified in the output. The proposed address identified on the output is likely to be the latest address that was held on the contact record previously. This will need to be manually updated. This should be checked against any existing records you may have access to i.e. any paper copies or previous data collections. If in any doubt we would recommend collecting this data again to ensure that it is correctly updated.