SIMS
Address Tidy
and
MergeTool
Guidance Notes

1st Document

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Address Tidy & Merge

Introduction
Due to the mismatch of addresses in ONE (the Local Authority Central Database) and each schools SIMS database, addresses have previously not been imported via B2B (Base to Base) to ONE. With the introduction of the Tidy & Merge utility within SIMS it is now possible to correct each schools SIMS database, validate the address against the NLPG (National Land & Property Gazetteer) and update ONE automatically via B2B (Base to Base).

Tidying addresses increases the likelihood of success when searching for an address and reduces the risk of the same address being added twice. The tidy process also increases the chances of identifying duplicate addresses.

The Address Tidy & Merge utility is used to merge duplicate addresses within SIMS and highlights incorrectly formatted and unknown addresses that can be corrected prior to merging and validating.

There are 4 steps to the process:

1. Run the SIMS reports
These reports are for your information only and should be used as a backup of the address data prior to starting the Tidy and Merge process.

2. Unmatchable Address Report
This report will identify addresses that are incomplete, have data in incorrect fields or contain superfluous data such as phone numbers or other contact details.

NB: It is advisable to run this report before running the Tidy and Merge Addresses routine so that the data, if possible, can be manually corrected.

3. Tidy Address Report
This report will identify the proposed changes to the addresses in the database. This must be thoroughly checked before proceeding, as data not corrected here will be altered once the merge routine has been run.

NB: It is advisable to run this report twice, as some of the rules used in the routine depend on a comparison with other addresses. Therefore, any addresses tidied during the first run may enable further improvements on the second run of the routine.
4. **Merge Duplicate Addresses**

Duplicate addresses exist in SIMS, because they have been entered manually more than once, or imported via a CTF/ATF file. These duplicate addresses can be merged into a single address, and each resident at that address is then assigned to the single address.

These guidance notes have been designed assuming that your Admin Server and workstations have SIMS installed on the I:\SIMS drive or a D:\Simshare drive on the admin network. If this is different you will need to adjust these notes according to your installation.

**NB:** The following can be completed at a workstation with access to the I:\ Drive

**Preparation**

1. **School Administrator** or **Admin Assistant** permissions are required to run the **Tidy & Merge Reports**. **Third Party Reporting** permissions are required to run the **Parent\Pupil Addresses (No “little house”)** report.

2. Import the reports included with the pack - **Tidy & Merge Reports.zip**

These will need to be unzipped and imported into SIMS. If you are unsure how to do this please refer to **Appendix A**

- **Addresses by Postcode**
- **Addresses – Pre\Post Tidy & Merge**
- **Family Links - Excel**
- **Parent\Pupil Addresses (No “little house”)**

3. Check in SIMS that the route **Tools | Housekeeping | Bulk Address Tools** is available. If it is unavailable contact the Strictly Education 4S Service Desk to release the Licence Patch.

**NB:** - **Before applying the patch ensure a backup has been taken.**
4. Create a folder on I:\ drive – **Tidy & Merge** (You will already have this folder if you are using the notes that were attached to an email.)
   - Browse to I:\
   - Select File | New | Folder
   - Overtype ‘New Folder’ with Tidy & Merge

5. With the new **Tidy & Merge** folder highlighted create another folder (as per above instructions) with the name **Reports**.

6. Highlight Reports and create another 2 folders (as per above instructions) and name them **Post-Merge** and **Pre-Merge**.
   - Refer to structure shown

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**Running the imported SIMS reports**

These reports are for your **information only** and should be used as a backup of the address data prior to starting the Tidy and Merge process.

**Addresses – Pre\Post Tidy & Merge Report**

1. Go to Reports | Run Report
2. Expand the **Focus** folder then the **Student** folder.
3. **Double-click** on the report.
4. Select the following options:
   - **Student Status is On Roll**, **Year Group is: Select All**, **Reg Group is: Select All**.
5. **Click OK**.
   - The following report will open in Word. (This should take approx 3 – 5 minutes. For a large Secondary school this report is approx 66 pages.)

6. Scan through the report. Make a note of any addresses that you are unsure about as they will need to be checked after the tidy & merge process has been completed.

   E.g. The Anders children in the above example both live at the same address but it has been entered in two different formats. In the first address line the name of the house ‘Fox House’ is in the incorrect field. This should be in the House Name field.

   **NB: This will be corrected during the tidy process.**

7. Save the report in **I:\Tidy & Merge\Reports\Pre-Merge** e.g. Pre-Tidy Addresses
If you want to modify the address manually do the following:

8. **Modify** the students\' pupils address details appropriately.
9. Re-run the report and save with a different name. e.g. Pre-Tidy Addresses1

**Family Links – Excel Report**

This report will show siblings on roll in the school. However, if they don't live at the same address then they won't be on the list. At the end of the merge process the report will be run again and compared.

1. Run the report for the whole school. Select **Enable Macros** in Excel
2. Save in I:\Tidy & Merge\Reports\Pre-Merge.  

1 These reports are for **pre-merge backup** information only and you do **NOT** have to amend the records. This will be done automatically during the Tidy & Merge process.

**Parent\Pupil Addresses (No “little house”) report.**

**NB:** Ensure that the SIMS User running this report has **Third Party Reporting User Permissions**, in SIMS System Manager, for it to show the correct results

This report will show any pupil and parents who live at the same address but the ‘little house’ is not showing. Again, you do **NOT** need to edit any details the merge process will correct this.

It will also highlight those parents who do live at a different address. This data will remain unchanged during the tidy and merge process. It is for your information only.

1. Run the report for the whole school. Select **Enable Macros** in Excel
2. Save in I:\Tidy & Merge\Reports\Pre-Merge.  

**Addresses by Postcode Report**

Addresses that have been affected by any Postcode changes should be identified and corrected before using the address Tidy and Merge tool. For example, if your school is located in an area that was CB2 but is now CB24.

A SIMS report can be run to help identify these addresses.

Please Refer to **Appendix B** for instructions

**NB:** - **If your school is unaffected by any Postcode changes you do not need to run this report**
Running the Unmatchable Address Report

It identifies addresses that are not complete enough to identify a unique residence. Such addresses should be manually edited before proceeding with the merge routine.

1. Select Tools | Housekeeping | Bulk Address Tools | Unmatchable Address Report

2. The report will be displayed in a web browser. Please be patient – the report may take a few minutes to display.

Note: If you get an ‘Internet explorer failure’. Open Internet Explorer then minimize it. Run the Unmatchable Address Report again.

3. The report may be minimized on the Task Bar at the bottom of the screen.

4. Select File | Save As.

5. Save the report to the I:\Tidy & Merge\Reports\Pre-Merge folder created earlier.

The report lists any unmatched addresses together with the name of the people who are residents at the address.

For a list of the codes that are used to identify residents refer to Appendix C.

It is recommended that the unmatchable addresses are manually edited and corrected before continuing. Use the following advice to assist in editing.

<table>
<thead>
<tr>
<th>Resident</th>
<th>Advice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students on Roll</td>
<td>Modify the address</td>
</tr>
<tr>
<td>Contacts of Students on Roll</td>
<td>Modify the address</td>
</tr>
<tr>
<td>Ex Students</td>
<td>These can be ignored unless it is a sibling of a student on roll and you want to keep the family links</td>
</tr>
<tr>
<td>Contacts of Ex Students</td>
<td>As above</td>
</tr>
<tr>
<td>Applicant</td>
<td>As above</td>
</tr>
<tr>
<td>Employee &amp; Ex Employee</td>
<td>This is your choice</td>
</tr>
<tr>
<td>Next of Kin</td>
<td>This is your choice</td>
</tr>
<tr>
<td>Agencies &amp; Agents</td>
<td>This is your choice</td>
</tr>
<tr>
<td>Other Schools</td>
<td>This is your choice</td>
</tr>
</tbody>
</table>
Re-run the report as many times as required. If you are saving each copy of the report as a backup, save with a different name each time. It is not required to save each rerun of the report as long as you have the initial report with the original addresses.

### Changing Address Tidy Rules

Before running the Address Tidy Report change the following Tidy Rules.

1. Select **Tools | Setups | Address Tidy & Merge Setup**.
2. Scroll to the end of the list and remove the ticks from the active column for the following Codes:
   
   - **s2**: Tidy addresses which have no current residents
   - **z1**: Upper case the Town (if active or set town to mixed case (if inactive).
   - **z5**: Apply the z1 change to EVERY address, including ones previously tidied or validated.

3. Click **Save**.
Tidying Address Report

It is recommended that all other users log out of SIMS when this routine is run. This report will advise you how the Tidy Process will adjust the addresses.

1. Select **Tools | Housekeeping | Bulk Address Tools | Tidy and Merge Addresses**.

2. Select **Tidy Report** to produce the Address Tidy Report.

   (Please be patient this may take a long time to complete – large Secondary ± 8mins).

This report must be run before the tidy process can be run.

3. The report will open in a web browser.

4. The report may be minimized on the Task Bar.

   Click on the minimized explorer button to expand.

<table>
<thead>
<tr>
<th>Address Tidy Report</th>
<th>NB: - Column headings only appear on the first page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Address Type</strong></td>
<td><strong>Apartment</strong></td>
</tr>
<tr>
<td>Before</td>
<td>-</td>
</tr>
<tr>
<td>After b8</td>
<td>-</td>
</tr>
<tr>
<td>Before</td>
<td>-</td>
</tr>
<tr>
<td>After m9</td>
<td>2</td>
</tr>
<tr>
<td>Before</td>
<td>-</td>
</tr>
<tr>
<td>After m9</td>
<td>-</td>
</tr>
</tbody>
</table>

4. Select **File | Save As**.
5. Enter a file name. e.g **Address Tidy Report v1**
6. Save the report to the **I:\Tidy & Merge\Reports\Pre-Merge** folder created earlier.
7. In SIMS click **cancel** in the **Address Tidy Report Wizard** as this report needs to be thoroughly checked before tidying the addresses.
8. **Manual** amendments will need to be made to the addresses. (see later in this section)
You have 2 choices of printing the report.

**From the Web Browser**

Before printing amend the page setup to **Landscape**, or the last column will be cut off.

1. Select **File | Page Setup**.
2. In Orientation select **Landscape**.
3. Select **File | Print**.

**NB: This report may be very long, it is advisable to copy the report into an Excel spreadsheet and delete or hide any rows of addresses that need no further investigation.**

**Copy a Report to Excel.**

1. With the .html report open **Select Ctrl +A keys** on the keyboard. This will highlight the information in the report.
2. Then select **Ctrl +C keys** on the keyboard.
3. Open Excel.
4. Select **File | Page Setup**.
5. On the **Page Tab** in **Orientation** select **Landscape**.
6. Click **OK**.
7. Click into the first cell on the worksheet.
8. **Right-click** and select **Paste**.
9. **Thoroughly check** the report deleting/hiding any lines that require no further investigation. In other words, the addresses are in the correct format.

Look at the **Before** and **After** versions of the addresses. This report is advising you what the tidy process will **automatically** do.

E.g. In the following example the **Before** address has been entered in SIMS as

2 Poplarvillas all in the **House Name field**.

When the Tidy Routine is run the **After** address will be corrected to show the no 2 in **Apartment Field** and Poplarvillas in the **House Name Field**.

**NB:** You do not need to do anything if the tidy report is showing it will modify the address correctly.
If the tidy process wants to modify the address incorrectly or any address that you are unsure about, make a note of these. When the automatic tidy process has been **completed** modify these addresses manually to show the correct format.

**Points to look out for:**

- Street names such as “Court” may be tidied into the “House Name” column, when they should be in the Street Description box.
- Village names or Districts can, on occasion, be moved across into the wrong column, for example they may appear erroneously in the Street Description column or the District Column.
- In some instances, the problems have arisen because the existing address has not been entered correctly.

1. In the address panel of the **Student** or **Contact** click on **Modify Address**,  
2. Click **Yes** to confirm that you are only going to make minor corrections to the address.  
3. Check that the correct parts of the address appear in the correct boxes. Village names should appear in the District box. Postal Town in the Town box etc.

Although the addresses for the following examples look strange in the address details panel any labels or quick letters will be printed in the correct format. These examples do not have postcodes, **but you will need** to enter them in your data.

**Example 1**  
1 Ridgeview Cottages, South Hill, Godalming, GU7 1JT.

**Example 2**  
20 Seaside Court, 9 London Mews, Any Town
Example 3

4 The Spinney, Tuppence Cottage, Any Town

With this example ‘Tuppence Cottage’ can be entered in either House No. or Street fields.

There will be occasions when the address is entered correctly but the Address Tidy routine wants to tidy it to an incorrect address. See the example below:

<table>
<thead>
<tr>
<th>Address Type</th>
<th>Apartment</th>
<th>House Name</th>
<th>House Number</th>
<th>Street Description</th>
<th>District</th>
<th>Town</th>
<th>County</th>
<th>Post Code</th>
<th>Country</th>
<th>Resid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before</td>
<td>-</td>
<td>-</td>
<td>98</td>
<td>Birchen Valley</td>
<td>Emerson</td>
<td>Milton Keynes</td>
<td>-</td>
<td>MK4 2JX</td>
<td>-</td>
<td>[Cnty] Rokeby Park</td>
</tr>
<tr>
<td>After b621</td>
<td>98</td>
<td>Birchen Lee</td>
<td>-</td>
<td>Emerson Valley</td>
<td>-</td>
<td>MILTON KEYNES</td>
<td>-</td>
<td>MK4 2JX</td>
<td>United Kingdom</td>
<td>as also</td>
</tr>
</tbody>
</table>

In this instance the “Before” address was correct. Unfortunately, the tidy utility tool cannot account for all possibilities, therefore it will be necessary to make a note of this address (or mark the tidy address report if you have printed it). Once the Tidy routine has been run it will be necessary to edit the address in Student Details and Restore it to the correct format fields.

4. After any manual adjustments re-run the Tidy Address Report
5. Select Tools | Housekeeping | Bulk Address Tools | Tidy and Merge Addresses
7. Repeat the above steps until you are satisfied that the addresses will be tidied correctly.
8. You can save a copy of the report each time it is run.
Address Tidy & Merge

Tidying Address Process
This process will tidy the addresses according to the Before and After information in the Address Tidy Report.

NB: The Address Tidy report MUST BE run again for the TIDY button in the wizard to be available.

1. Select Tools | Housekeeping | Bulk Address Tools | Tidy and Merge Addresses
2. Select Tidy Report button.
3. Save a copy of the updated version, in case you need to refer back to it, in I:\Tidy & Merge\Reports\Pre-Merge folder. E.g. Address Tidy Report v2
4. Select Tidy from the Address Tidy & Merge Wizard (Please be patient. This may take several minutes to complete).

You can either proceed straight\(^1\) to the Merge routine or cancel out of the wizard to return\(^2\) at a later stage.

Address Merge Routine.
You are now ready to run the Address Merge Routine.

Very Important: Please ensure that you have run the “Tidy” routine as per above instructions before proceeding.

\(^1\)If you are proceeding straight from step 4 above without exiting the Wizard.
\(^2\)If you are returning after a break.

2. Select Tools | Housekeeping | Bulk Address Tools | Tidy and Merge Addresses.
3. Select Skip to Merge.
4. Select Merge Report
5. The report will be displayed in a web browser. Please be patient – the report may take a few minutes to display.
6. The report may be minimized on the Task Bar at the bottom of the screen.

<table>
<thead>
<tr>
<th>Address Merge Report</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
</tr>
<tr>
<td>Original</td>
</tr>
<tr>
<td>Original</td>
</tr>
<tr>
<td>Merged</td>
</tr>
</tbody>
</table>
7. Select File | Save As.
8. Enter a file name. e.g. Address Merge Report v1
9. Save the report to the I:\Tidy & Merge\Reports\Pre-Merge folder created earlier.
10. Before printing the report amend the page setup to Landscape, the last column in this report is extremely important as it advises you of the residents
12. In Orientation select Landscape.
13. Select File | Print

If you prefer to work from an Excel Spreadsheet refer to the instructions on Pg 8 - Copy a Report to Excel

The first column “Status” shows the existing addresses (Original) and what the system intends merging it/them into (Merged). The system will merge more than two addresses if it detects more than two that need combining.

Thoroughly check the addresses, and the residents of the addresses, that it intends to merge.

NB: You cannot select which addresses should be merged, it is ALL OR NOTHING.

If you are satisfied with the Merge Report you can now skip to Step 8 - Merge

Sometimes the routine wants to merge addresses that should not be merged, again make a note of these.
1. Click cancel in the Address Tidy & Merge Wizard and edit the addresses as required.

NB: Empty Town or County boxes can sometimes cause non-similar addresses to be marked for merger.
2. When you have finished editing addresses you will need to reopen the wizard and rerun the Merge Report.
4. Select Skip to Merge.
5. Select Merge Report.
6. Check the report and save again.
7. Repeat the above until you are satisfied with the Merge Report results. If there are still addresses that should not be merged make a note of them as they will need to be edited after the Merge process.
8. Select the Merge button.
Please be patient – the process may take a few minutes to complete. (Large Secondary ± 10 mins)

9. Click Finish.
10. Click Yes to the message to close the Address Tidy & Merge Wizard

You have now completed Tidying and Merging the Addresses in SIMS.

Any addresses that were marked from the Tidy Report that have been formatted incorrectly and any addresses that were marked from the Merge Report that should not have been merged will now need to be checked and manually corrected.

The Reports imported at the beginning of this process can now be re-run and compared.

The Family Links – Excel can be run to check the sibling links.

The Parent/Pupil Addresses (No “little house”) can be used to check where pupils and contacts living at the same address now have a “little red house”.

A Data Collection form sent out to both Students and Staff would be easier to highlight any errors. You will then need to amend the addresses accordingly.

A Staff Data Collection Report is available to download and import from our website Support Services | SIMS & Technology | ICT Service Desk | SIMS | SIMS Personnel | Personnel Reports.

The Addresses now need to be Validated using the Bulk Validation Utility.

Refer to the Bulk Validation Notes included in this pack.
Appendix A

Unzip a file
This file has already been unzipped. You can go to Import the Report into SIMS.

The following instructions are for unzipping a file using the zip program in Windows XP.

1. Unzip the file in the I:\SIMS\Tidy & Merge folder.
2. Right click on the .zip file and choose Extract All.
3. Click Next on the Extraction Wizard window.
4. In the Files will be extracted to this directory: field select the browse button and navigate to the I:\SIMS\Tidy & Merge folder
5. Select Next.
6. Click Finish.
7. The unzipped file is now ready to be imported into SIMS.

Import the Report into SIMS
1. Login to SIMS as a user with the correct permissions.
2. From the menu select Reports | Import.
3. In the Archive File Area click on the Open Button (Right).
4. Browse to the Reports folder.
   e.g. I:\SIMS\Tidy & Merge
5. Highlight the unzipped file e.g. Tidy & Merge Reports.rptdef.
6. Select the Open Button.
7. Select the Import Button (bottom of window).
8. The Status will change from ‘pending’ to ‘imported’.
9. Click the Close button.
10. The report is now available to use from the Reports | Run menu.

Note
To find the report open the correct folder in the reports menu.
   e.g. Pupil reports will be in Focus\Student
Appendix B

Addresses by Postcode Report
Addresses that have been affected by any Postcode changes should be identified and corrected before using the address Tidy and Merge tool. For example, if your school is located in an area that was CB2 but is now CB24.

A SIMS report can be run to help identify these addresses.

**NB:-** If your school is unaffected by any Postcode changes you do not need to use this report.

1. Go to **Reports | Run Report**
2. Expand the **Focus** folder then the **Student** folder.
3. Double-click on the **Addresses by Postcode** report.
4. Enter the required postcode. E.g CB2
5. Click **OK**.
6. The following report will open in Excel.

<table>
<thead>
<tr>
<th>Name</th>
<th>Reg</th>
<th>HouseNo.</th>
<th>House/ Apart</th>
<th>Street</th>
<th>District</th>
<th>Town</th>
<th>Postcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jill Barnett</td>
<td>4L</td>
<td>65</td>
<td>Link road</td>
<td>Sawston</td>
<td>CB2 CAE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lucy Beauty</td>
<td>EH</td>
<td>66</td>
<td>Link Road</td>
<td>Sawston</td>
<td>CB2 CEE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sophie Locket</td>
<td>BS</td>
<td>307</td>
<td>Church Lane</td>
<td>Sawston</td>
<td>CB2 6DF</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cameron Fielding</td>
<td>4L</td>
<td>140</td>
<td>Seddon Road</td>
<td>Sawston</td>
<td>CB2 6PG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jacob Dean</td>
<td>SM</td>
<td>44</td>
<td>Edgecombe</td>
<td>Sawston</td>
<td>CB2 8AA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gemma Peasdale</td>
<td>SS</td>
<td>444</td>
<td>Tedder Road</td>
<td>Sawston</td>
<td>CB2 8AH</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. Print or save the report in I:|Tidy & Merge|Reports|Pre-Merge
8. Now modify each student's/pupil's address details with the correct postcode.
9. Re-run the report as many times as required for each Postcode change.
Appendix C

Resident People Type Codes

The details of the resident that are displayed in the Unmatchable Address Report relates to a current employee or pupil/student, where possible. The following codes are used to identify resident people types:

- [Em] Current employee
- [St] Current student
- [xEm] Ex-employee
- [xSt] Ex-student
- [Cand] Ex-student/candidate (current address at date of leaving)
- [Cnt] Student contact
- [NoK] Employee next of kin
- [App] Applicant
- [ApRel] Applicant Relation (these could now be contacts for current pupils)
- [Sib] Applicant sibling
- [??] Unknown person (probably a previous student contact at one time).