SIMS
Bulk Validation
Guidance Notes

2nd Document

November 2019
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Validation

Introduction
The **Bulk Address Validation** functionality enables schools to create and send batches of tidied and merged addresses to an external web service where they will be validated against address point data. E.g NLPG (National Land & Property Gazetteer). This functionality requires a Licence Key which will be released via SOLUS.

A **Bulk Address Validation Scheduled Task** must be set up to enable sending and receiving of the address batches. The batches will be returned to the sending school where they can elect to replace the existing address details with validated address information.

**IMPORTANT NOTE:** Overseas addresses cannot be validated. For national security reasons, BFPO addresses cannot be validated by any Address Validation Service.

Preparation
1. This process must be completed on the **Admin Server** logged in as **Administrator**.
2. In SIMS **School Administrator, Admin Assistant,** or **System Administrator** permissions are required.
3. Check that the **Bulk Address Validation Licence** has been applied.
4. Create a scheduled job.
5. Replace existing addresses with validated information.

**DO NOT PROCEED UNTIL ADDRESSES HAVE BEEN TIDIED AND MERGED (1st Document)**
Bulk Validation Licence – Patch 11328
All schools should already have the **Bulk Validation Licence** applied to their SIMS database.

This licence makes the following menu routes available in SIMS

![Menu Routes Diagram]

If you cannot see these routes please contact the Strictly Education 4s Service Desk for assistance.

Web Address Validator Licence – Patch 7186
This licence will switch on the **Validate Button** in the Address Panel. It will be released to schools once the Bulk Validation has been completed. Please refer to **Maintenance** at the end of these notes.
Create a Scheduled Task

The scheduled task must be created on the SIMS Admin Server. The scheduled task will run at the time specified until it is de-activated or the details of the task are amended.

1. Logon to the Admin Server as an Administrator.
2. Login to SIMS as a user with System Manager Permissions.
3. Select Tools | Housekeeping | Bulk Address Validation Scheduler.
4. Click Search
5. Double-click the Bulk Address Validation task.
6. Leave the tick in Scheduler Active.
7. In the Scheduler Setting panel select the required day.
8. In the Times Excluded section select the times when the address batches should not be sent for validation.

**NB:** At least one period of time must be left deselected to enable the address batches to be sent for validation.

Address batches can be sent to the Address Validation Service between 8pm and 6am. This ensures that school’s network is not affected during the working day, and that other SIMS users can validate single addresses during this time.

If a proxy server is in use, select the Proxy Required check box and complete the Network User and Network Password of the network user accessing the proxy server. Add the Domain name and Proxy URL address.

9. Click the Test button to test the internet connection.
10. Click OK to the message “Internet Connection OK”.
11. Click Save.

If the Internet Connection does not connect please contact the SIMS Service Desk for assistance.
Check the Scheduled Task
Check that the scheduled task has been successfully created.

1. In Windows 10 type **Schedule** in the Search bar.
2. Select **Task Scheduler** App.
3. Select **Task Scheduler Library**.
   The **Bulk Address Validation Task** will be displayed

Create Batches of Addresses for Validation
Batches of addresses can now be sent to the **Address Validation Service**. Batches can include addresses from different address categories including the following:

- Students and contacts  
  A batch has to be created for this category and the addresses validated on return.

The following categories are also available to be validated if required. Please create separate batches for each category
- Applicants and contacts
- Staff and next of kin
- Agents
- Agencies
- Other Schools

**NOTE:** At this stage all your addresses will be available for validation. In the future, for ongoing maintenance, only addresses that have not previously been validated are made available for selection..

1. Select **Tools | Housekeeping | Bulk Address Tools | Bulk Address Validation Export** followed by the address category, e.g. Students and Contacts.
2. Click **Search**.
3. Once the required addresses are displayed, click the **Save** button. (Bottom Right)
NB: Once batches have been created, they cannot be deleted.

4. Click OK to the “Save Succeeded” message.
5. The Validated Batch has been sent automatically to the NLPG. You do not need to send any file via S2S or Webxchange.

You will now need to wait for the validated address batch to be returned to your school. Depending on the size of the batch this could take a few days.

NB:- The batch ‘file’ is NOT returned as a CTF. There is no file to download from S2S or Webxchange. The validated addresses will automatically be available for matching in SIMS as per the following instructions.

Review and Match Validated Addresses
The validated addresses must now be matched with the existing addresses in SIMS. Once matched, the records of all the people living at the matched address are updated.

NB:- This process must be completed in one session. You CANNOT save and return later to finish the matching. Once a batch has been saved it will disappear from the batch import list and will assume the addresses had been checked and matched correctly. The addresses in SIMS will be updated and validated according to the selections made in the following instructions.

Keep checking in the following route in SIMS to see if the validated batch\'es have been returned.

1. Select Tools | Housekeeping | Bulk Address Tools | Bulk Address Validation Import.
2. Select the required address Category from the drop-down list. E.g Students and Contacts
3. Click Search.
4. Highlight the required address batch with an Import Status of Received
5. Click Select.
The **Bulk Address Validation Import** page contains three different panels showing how the addresses have been validated:

- **Single Address Matches Returned** panel – lists addresses in SIMS that have been successfully matched with a single validated address.
- **Multiple Address Matches Returned** panel – lists addresses in SIMS that could be a match for more than one validated address. E.g. a Flat number
- **Imported Addresses Not Validated** panel – lists any addresses that were unable to be validated.

### Matching Single Addresses

The **Single Address Matches Returned** panel lists address in SIMS that have been successfully matched with a single validated address.

The addresses are listed in pairs. Each pair of addresses contains the *Existing SIMS* address and the *Validated* address based on the House Name/House Number and Postcode. Review the details in the **Single Address Matches Returned** panel, decide whether to overwrite all the existing SIMS addresses with validated addresses or to overwrite only selected addresses.
Matching Addresses Individually
1. Select the **Selected Address** check box in either the **Existing** row (to retain the address in SIMS) or the **Validated** row (to overwrite the existing address with the validated address).

<table>
<thead>
<tr>
<th>Address</th>
<th>Existing</th>
<th>Validated</th>
</tr>
</thead>
<tbody>
<tr>
<td>32 Alder Road Hampton Hassle Peterborough PE7 8BX</td>
<td>32 Alder Road Hampton Hassle Peterborough PE7 8BX</td>
<td></td>
</tr>
</tbody>
</table>

2. Repeat for each address pair listed in the **Single Address Matches Returned** panel.
3. **DO NOT** Save until you have completed matching the multiple addresses.

Matching All Addresses
This will do a bulk selection of either **All Existing** or **All Validated** addresses. You can then change the selection of any individual addresses as required.

1. To retain all **existing** addresses in SIMS, click the **Select All Existing** button.

2. To retain all the **validated** addresses and overwrite the addresses in SIMS, click the **Select All Validated** button.
3. **DO NOT** Save until you have completed matching the multiple addresses.

Print the Selections
1. Click the **Print** button to produce a **Single Address Matches Returned** Report displayed in your web browser.
Matching Multiple Addresses

The Multiple Address Matches Returned panel lists addresses in SIMS that could be a match for more than one validated address returned by the Address Validation Service. This may be because the address is that of a building that has been divided into flats, all with the same Post Code. It may also be due to insufficient address information such as missing District, Country, etc.

1. In the Selected Address column, select the check box adjacent to the most likely matched address.
2. **DO NOT** Save until you have finished matching ALL of the addresses in the Multiple Addresses section.
3. Click the Print button to produce an html output of the Multiple Address Matches Returned report.

Addresses that Could Not be Validated

The Imported Addresses Not Validated panel displays any addresses that could not be validated. These will be overseas addresses, BFPO addresses or any addresses that cannot be validated by the Address Validation Service. If there is an address in the list that has perhaps been incorrectly formatted or has an inaccurate postcode this can be edited and validated on entry. The information in this panel is read-only but a list can be printed for your records.

1. Click Print to produce an html output of the Imported Addresses Not Validated report.

**NB:** Only when you have completed the selections of both the Individual and Multiple Address panels and viewed/printed the Addresses Not Validated panel should you select the Save button.
Request the Web Address Validator Licence

Please request the Service Desk to release the Web Address Validator Licence – Patch 7186 via SOLUS.

Servicedesk@strictlyeducation4s.co.uk

Text:

“I, [Enter your name here], confirm I have carried out the correct procedures by Tidying & Merging the addresses for Students and Contacts for [Enter your school name here] SIMS database. I have also completed the Bulk Validation Process and would now like to apply the Web Address Validation Licence Patch 7186.”
IMPORTANT

Maintenance
Addresses will need to be kept up to date as this information will be transferred to ONE (the central database) via the B2B Scheduled task.

For the ‘Validate Button’ to be available the Web Address Validator licence (Patch no.7186) needs to be applied via SOLUS. Please complete the necessary backups prior to applying this licence.

Validating New Addresses
Best practice would be to Validate a new address every time it is created in SIMS by selecting the Validate button.

Applicants & Contacts Addresses
When the new intake for September has been imported into an Intake Group from an ATF file, the Tidy and Merge Process can be run again. Create a new Bulk Validation Export Batch (as per instructions on pg.4) for the Applicants and Contacts category.

Housekeeping
The Tidy & Merge Process can be run on a regular basis to clean up any addresses that have been missed. Create a new Bulk Validation Export Batch (as per instructions on pg.4) and Review and Match the returned Validated Addresses.

You **DO NOT** need to send a CTF file again as addresses will automatically be updated in ONE (the central database) via B2B.