

SIMS .net Address Tidy and Merge Tool Guidance Notes

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Version	2

Address Tidy and Merge

Preparatory work.

Any Schools that have been affected by the Postcode changes over the last couple of years should try to identify and replace these postcodes before using the address Tidy and Merge tool. A SIMS .net report can be run to help identify these addresses. For example, if your school is located in an area that was CB2 but is now CB24.

- Create a new SIMS .net report
- Base this report on Student and Status on Roll.
- Select Forename & Surname and Address Block for Data fields.
- On the Define Filter Page, Click on New.
- Select Postcode under Family home and specify the Condition Begins with. Then tick the box to Prompt at run time.
- Run the report and enter the appropriate postcode when prompted eg CB2, or CB3. It may be worth running this report several times each time with a different code, as your database may contain addresses from more than one postal area.
- Edit student details etc. where the old postcodes have been identified and replace with the new postcodes.

Make a full backup of SIMS data in System Manager.

Use System Manager to make a backup of SIMS – name it pre address tidy and merge.

Address Tidy and Merge Setup

All the Address Tidy rules can be seen at Tools | Setups | Address Tidy and Merge Setup. The only rule that you might want to switch off or run silently is z1 Capitalize Town. If you do not want town names of addresses to be converted to uppercase remove the tick from the second box (Active) for z1. If you do want to Capitalize the Town, you may want to remove the tick from the first box (Report) for z1 to allow this tidy to occur without every address appearing in the Tidy Report.

Run the Address Tidy Routine

Use the route in SIMS .net Tools | House Keeping | Bulk Address Tools | Tidy and Merge Addresses.

Select **Tidy Report**.

Once the report has been generated check it **very** carefully.

Column headings only appear on the first page
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Address Tidy Report

Address Type	Apartment	House Name	House Number	Street Description	District	Town	County	Post Code	Country	Residents
Before	-	-	11	Castle Close	Wirral	-	-	CH45 0SU	-	[St] Baker, James
After b8 z1	-	-	11	Castle Close	-	WIRRAL	-	CH45 0SU	United Kingdom	as above
Before	-	2 Poplarvillas	-	Dry Drayton Road	Oakington	Cambridge	Cambridgeshire	CB24 3YX	-	[St] Amos, Rosanna
After m9 z1	2	Poplarvillas	-	Dry Drayton Road	Oakington	CAMBRIDGE	Cambridgeshire	CB24 3YX	United Kingdom	as above
Before	-	-	12	Woodcroft	Marholm	PETERBOROUGH	-	PE6 7HN	-	[xSt] Elliot, Mark Lewis
After n9	-	-	12	Woodcroft	Marholm	PETERBOROUGH	Lincolnshire	PE6 7HN	United Kingdom	as above

N.B. If you choose to print the report, amend the page setup to Landscape, or the last column will be cut off. This report may be very long, it is probably better just to copy any rows of information you would like to investigate into a blank word document). Look at the Before and After versions of the addresses. Any that you are unhappy with make a note of, or mark for investigation.

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 problem has arisen because the existing address has not been entered correctly. In Student Details, click on Modify Address, confirming that you are only going to make minor corrections to the address. 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.

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:

Address Type	Apartment	House Name	House Number	Street Description	District	Town	County	Post Code	Country	Resid
Before	-	-	98	Birchen Lee	Emerson Valley	Milton Keynes	-	MK4 2JX	-	[Cnt] ROGER for Richa
After b6 z1	98	Birchen Lee	-	Emerson Valley	-	MILTON KEYNES	-	MK4 2JX	United Kingdom	as abo

In this instance the "Before" address was correct. Unfortunately no tool to carry out such a tidy routine can account for all possibilities, in this instance it will be necessary to make a note of this address (or mark the tidy address report if you have printed it) then once the Tidy routine has been run it will be necessary to edit the address in Student Details and restore it to the correct boxes.

Once the Tidy Address Report has been checked and any manual amendments to addresses made, re-run the Tidy Address Report and save a copy of the updated version in case you need to refer back to it.

Schools with non UK addresses should take extra care, strings of numbers contained in overseas addresses may be stripped out as the tidy routine treats these like telephone

numbers in the wrong field. These can be re-input after the tidy routine is run, or you can proceed to the Merge Address routine without tidying.

You are now ready to run the

Address Merge Routine.

Use the route in SIMS .net Tools | House Keeping | Bulk Address Tools | Tidy and Merge Addresses.

Select Skip to Merge.

Click Merge Report.

Address Merge Report

Status	Apartment	House Name	House Number	Street Description	District	Town	County	Post Code	Country	Residents
Original	-	-	15	Mill Way	Friday Bridge	Wisbech	Cambridgeshire	PE14 0HZ	215	[St] Atkinson, Ben
Original	-	-	15	Mill Way	Friday Bridge	Wisbech	Cambridgeshire	PE14 0HZ	215	[St] Atkinson, Ben
Merged	-	-	15	Mill Way	Friday Bridge	Wisbech	Cambridgeshire	PE14 0HZ	215	as above

This report also needs checking very carefully. Again it can be printed, but will need to be set up in Landscape format as the final column is extremely important. Copying and pasting rows of data you would like to check into a blank document is probably the best option. The first column "Status" shows which are the existing addresses (Original) and what the system intends merging them into (Merged). The system will merge more than two addresses if it detects more than two that need combining.

Check the addresses and the residents of the addresses that it intends to merge. Be warned, you cannot select which addresses should be merged, its all or nothing. If the system is going to merge addresses that should not be merged, edit the addresses, empty Town or County boxes can sometimes cause non-similar addresses to be marked for merger.

When you have checked the report thoroughly and made any amendments necessary and are happy to proceed, run the merge address report again. Check through the report briefly one last time, save and close the report and then click on Merge.

Click on finish when prompted to do so.