

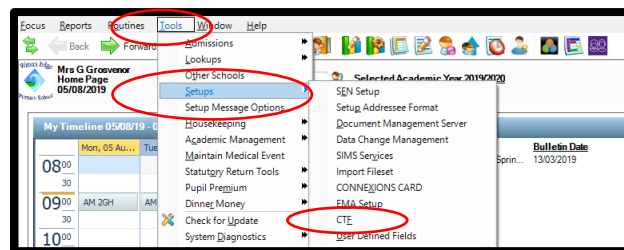


Helpsheet PM5 – Export CTF

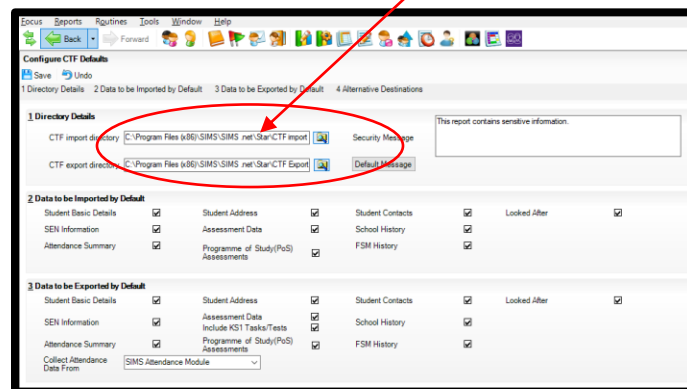
Exporting a Common Transfer File

When pupil/students leave your school to attend another school, it is a statutory requirement that all available details are passed to the destination school, via CTF, within 15 days. When pupil/students have been allocated to their destination schools and the export routine is run, SIMS creates a CTF for each destination school. Some LAs prefer to collate the information contained in a school's CTF export files themselves then compile a single export file for each school. Where this is the case, schools will be asked to send their CTFs directly to the LA. NOTE: Problems can occur if untidy or duplicated addresses exist. Before performing the CTF export routine, check with your System Manager to establish whether the Address Tidy and Merge routine has been run recently.

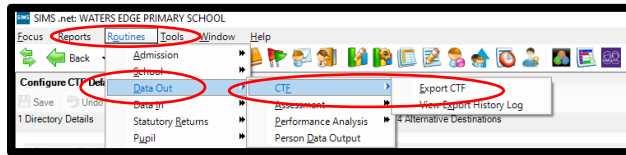
Creating a CTF Export File NOTE: Before creating a CTF export file, you must first set up the CTF defaults via **Tools | Setups | CTF**.



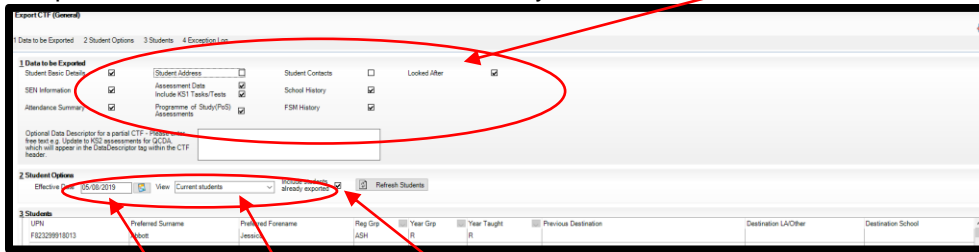
The default location for the CF file to be saved can be amended as follows – it is recommended that they are saved in a secure location which is generally in the **SIMS Star** folder.



1. Select **Routines | Data Out | CTF | Export CTF** to display the Export CTF page.

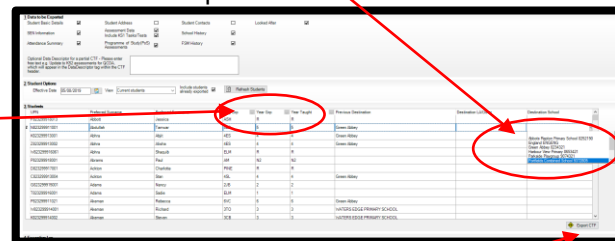


2. Indicate the data you wish to export by selecting or deselecting the appropriate **Data to be Exported** check boxes. NB. As a general rule deselect **Student Contacts** as this data will not be as up to date as records held on the school system.



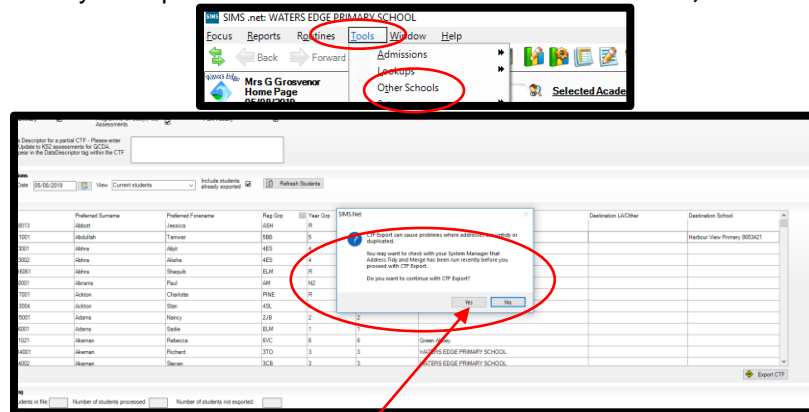
3. In the **Student Options** panel, enter an **Effective Date** or click the Calendar button then select the required date. The date must fall within the current academic year, as it governs the cut-off point for the exclusion of the selected pupil/students, based on the View settings.
4. **Select the type of pupil/student** you wish to **include** in the export file from the View drop-down list, e.g. Current students. Select the Include students already exported check box if you wish to display pupil/students who have been included in previously created CTFs.
5. NOTES: Selecting All from the View drop-down list displays all pupil/students. Selecting Leavers previous years displays all pupil/students who have left your school in all previous years. Therefore, if either of these options is selected, the Effective Date filter is not applicable.
6. In the Students panel, click in the **Destination LA/Other** or **Destination School** cell for each required pupil/student then select their destination from the drop-down list. NOTE: Only pupil/students who have been assigned a destination are exported.

Pupils can be filtered using the drop down filters on Year Group and Reg group.



7. TIP: Right-clicking anywhere in the grid enables you to **Select All** the pupil/students displayed. They can then be allocated to the same **Destination LA** or **Destination School** collectively. You can also highlight a selection by using the **Shift** or **Ctrl** keys in conjunction with the mouse button.
8. Click the **Export CTF** button to create and save the export file to the location specified when configuring the CTF Defaults.

9. If the school you require is not listed this can be created in **Tools, Other Schools** .



10. NOTE: Prior to exporting a CTF, a message prompts you to check with the System Manager whether the Address Tidy and Merge routine has been run.
11. To continue with the export, click the **Yes** button. To cancel the process in order to check with the System Manager, or to run the Tidy and Merge routine prior to CTF export, click the **No** button.
12. NOTE: Any errors preventing a record from being exported in full are written to the Export Exception Log. The exception log also warns if any information expected to be included in the CTF export file is missing for a pupil/student. For example, the Student Address is included but the address has no Street.
13. If any data exceptions are found, correct the missing data for the pupil/students who have not been processed or update any missing data items by editing their pupil/student details, then click the **Refresh Students** button to enable the **Export CTF** button again.
14. The **Destination LA/Other** or **Destination School** cells are blank for the pupil/students who were not processed originally and a new column listing the **Previous Destination** is displayed. Select the destination information as required.
15. When you have selected the **Destination LA** or **Destination School** for the relevant pupil/students, click the **Export CTF** button again to create and save the export file.
16. Once the file has been created, any exceptions dealt with and the file created again, if necessary, open Windows® Explorer and navigate to the location of the **CTF Export Directory** as defined in the **Configure CTF Defaults** page and identify the newly created CTF file (.XML) for export. Each file has a unique file name.
17. NOTE: In order to differentiate between CTF export files that have the same source and destination number, the file names are automatically appended with a sequence number, e.g. 1234567_CTF_9876543_001, 1234567_CTF_9876543_002, 1234567_CTF_9876543_003, etc.
18. The CTF file can now be sent to the recipient by the agreed method of secure transfer.

