

Importing ATF Files into SIMS

Related CPD can be found on the HfL CPD Hub:
<https://cpd.hertsforlearning.co.uk/courses/bookings/default.asp>

Document Reference: DMS004

Published/Updated April 2024



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INTRODUCTION

The Admissions Transfer File (ATF) contains a list of applicants who have been offered a place at your school, and includes basic information about these applicants and their contacts. Importing this file enables you to acquire this information in one activity. We do not recommend schools with a Nursery import the ATF as if any pupils are already on roll at your school, the import will cause a duplicate application that will need to be deleted.


The ATF is available from **SEAM** (Schools Electronic Admissions Module). You can access SEAM from the Hertfordshire Grid for Learning at <http://www.thegrid.org.uk/> where you will download the file from the website and import it into SIMS. You will need to contact SERCO for any SEAM support queries. This document will take you through the processes required before logging in to SEAM and after, once you have downloaded the file.

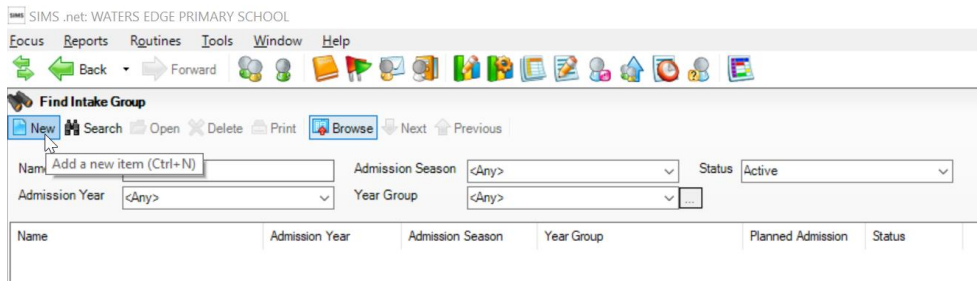
Before importing you **MUST** have set up an admission group for the applicants. You may also need to refer to document **DMS195 Applicants and Admission Groups or DMS001 End of Year Procedures** (link below) for help with this after downloading the file, please follow the instructions in this document to import it into SIMS.


http://bit.ly/dms_studentrec

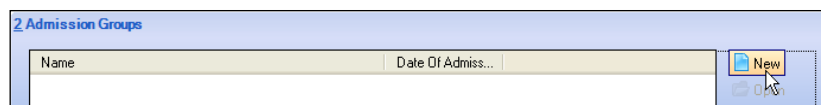
Please remember to put the Date of Admission for your new pupils as the start date of your new Academic Year (even though your Autumn term may not start on that date).

Setting Up Admission Groups

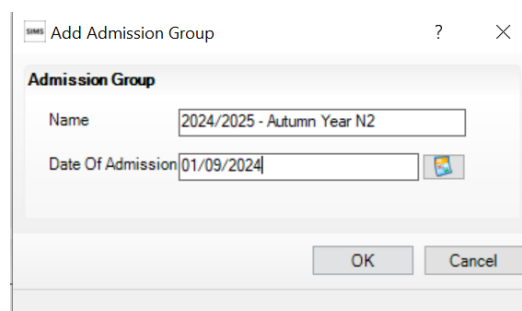
1. Choose **Routines > Admission > Admission Groups > Setup** to display the **Find Intake Group** browser.
2. Click the **New** button  to add a new group.



3. In the **Intake Group** panel, select **Admission Year**, **Admission Season** and the **Year Group** from the respective drop down lists.
4. Enter a numeric value for the **Planned Admission**: this represents the maximum number of new pupils that you can admit to this intake group. Always enter a number greater than or equal to the number you expect to have.
5. When you click into the **Name** field, a name for the intake group will automatically be generated based on the choices you have made. However, you can also edit the name as you wish.
6. If you are set up to use **Multiple Admission Groups** i.e. Autumn & Spring, you will need to click the **New** button  to set up a group (you may be set up like this and only have one intake, this is fine although it can be changed in Tools > Admission > Defaults).



7. Specify the **Name** and **Date of Admission** for the group and repeat for any other groups.



8. Click **OK**.

- If you are **NOT** using **Multiple Admission Groups**, then clicking in the **Name** field for the **Admission Group** will generate a name, which can then be edited as required as shown below. A **Date of Admission** must also be entered.

The screenshot shows a software interface for managing admission groups. At the top, there is a toolbar with icons for New, Search, Open, Delete, Print, Browse, Next, and Previous. Below this is a section titled 'Intake Group Details: 2024/2025 - Autumn Year N2' with a sub-toolbar for Save, Undo, and Print. A breadcrumb trail shows '1 Intake Group' and '2 Admission Group'. The main content area is divided into two sections:

- 1 Intake Group:** This section contains several fields:
 - Admission Year: 2024/2025 (dropdown)
 - Admission Season: Autumn (dropdown)
 - Year Group: Year N2 (dropdown)
 - Planned Admission: 30 (text input)
 - Name: 2024/2025 - Autumn Year N2 (text input)
 - Active: (checkbox)
- 2 Admission Group:** This section contains:
 - Name: 2024/2025 - Autumn Year N2 (A) (text input)
 - Date Of Admission: 01/09/2024 (text input with a calendar icon)

- Click the **Save** button  Save to save the details.

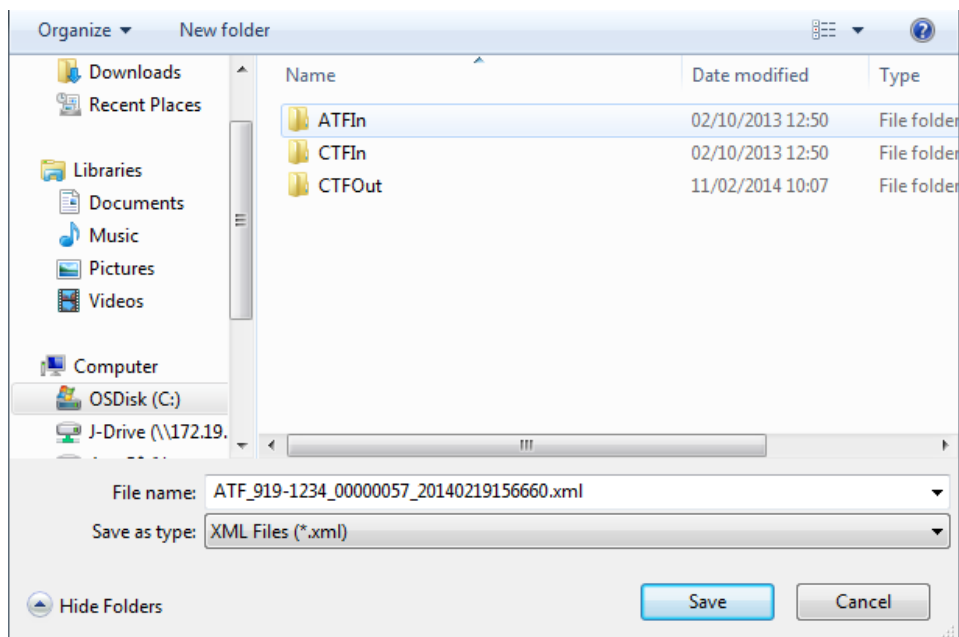
If you try to name your Admission group with exactly the same name as the Intake group, the system will warn you and automatically append the name of the Admission group with (A).

Importing the Admission File

The ATF is available from **SEAM** (Schools Electronic Admissions Module). You can access SEAM from the Hertfordshire Grid for Learning at <http://www.thegrid.org.uk/> where you will download the file from the website and import it into SIMS. You will need to contact the relevant team at HCC for any SEAM support queries.

Saving the File

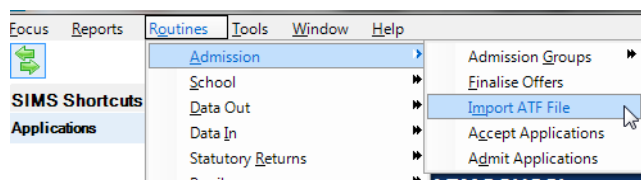
1. After downloading the file from SEAM, ensure it is saved in your **ATFIn** folder, usually found on your S: Drive. If this folder does not exist, create one with this name and save the file in there.



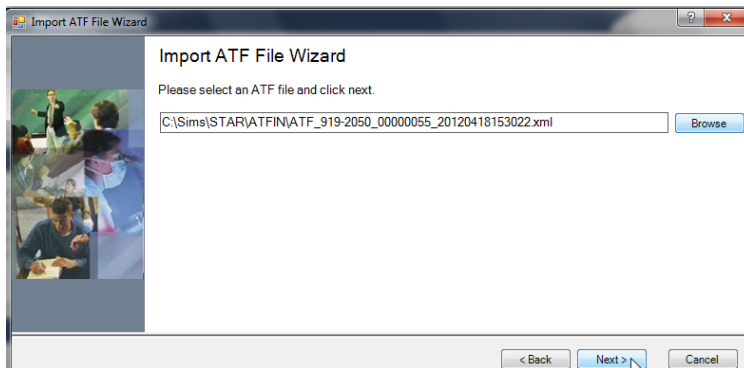
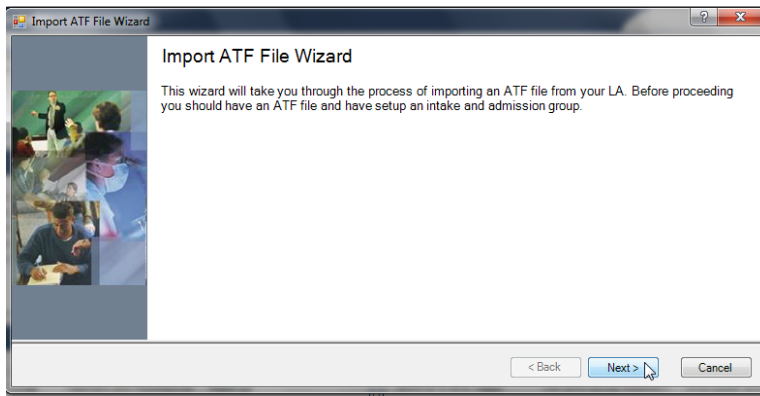
2. Save the ATF file.

Importing the Admissions Transfer File

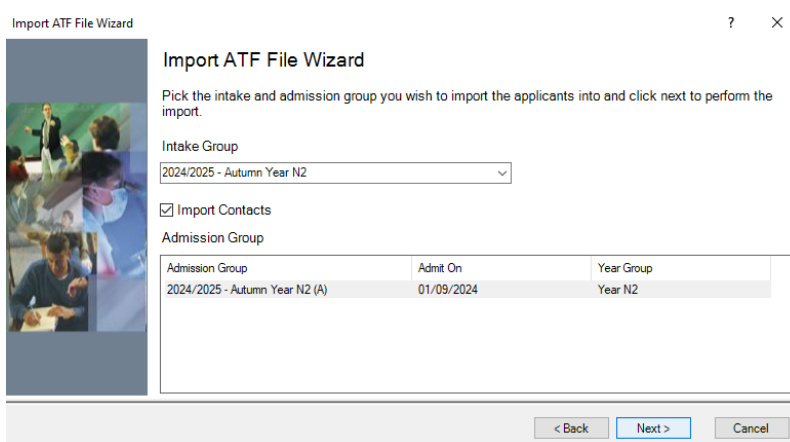
1. Choose **Routines > Admission > Import ATF File** to display the **Import ATF File** wizard.



2. Click **Next** to start the wizard.



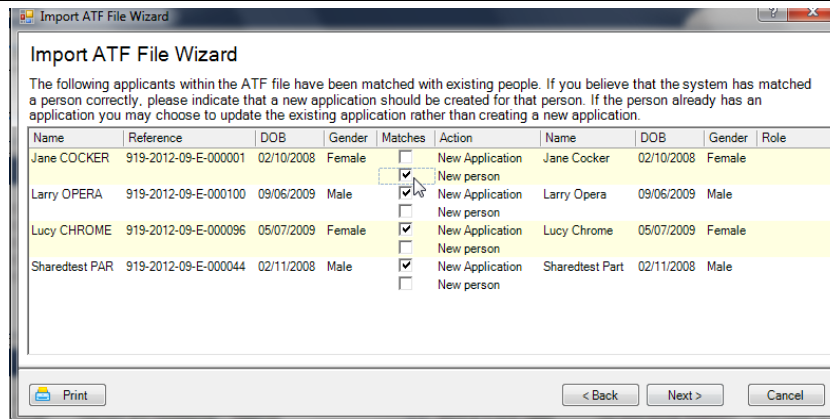
3. Click the **Browse** button and locate the ATF file that has been downloaded. Select the file and click **Open**. Click **Next** to continue.



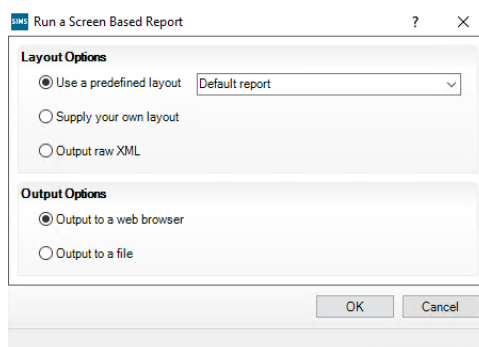
4. Select the **Intake Group** that you have previously created from the drop down list, and if there is more than one admission group highlight the required group in the list below.

If you need to click back at any point in the wizard and arrive back at this step, please ensure that you reselect the correct admission group.

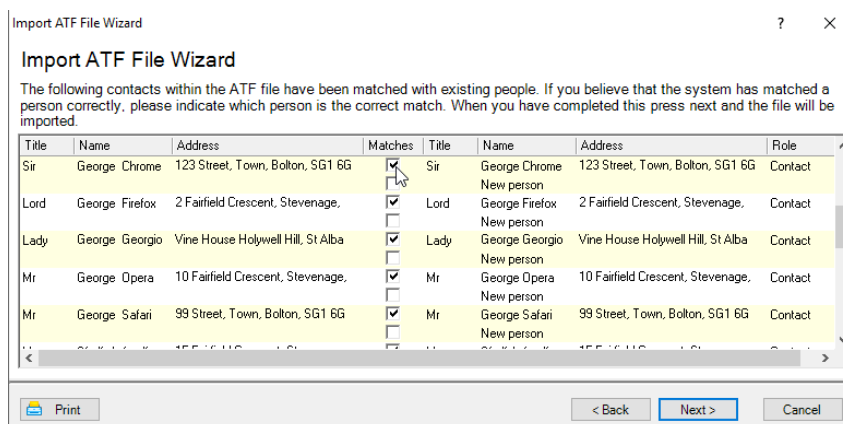
5. Click **Next**. If no duplicate applicants are found you will not get this screen and will be presented with the Contacts Screen (Step 9).



- The file wizard attempts to match applicants within the file whom it believes may be present already in the system – in the example above an application already exists for Larry Opera, and the wizard’s default action is to update this existing application. You should check any names that appear in this list and either leave the tick in **New Application** (updated application) or tick **New Person** instead if the applicant is new to your system. You can also click **Print** to produce a log file.



- Leave the options as above then click **OK** to open the log in your web browser Print or save as required.
- In the Import ATF File Wizard in SIMS click **Next**.

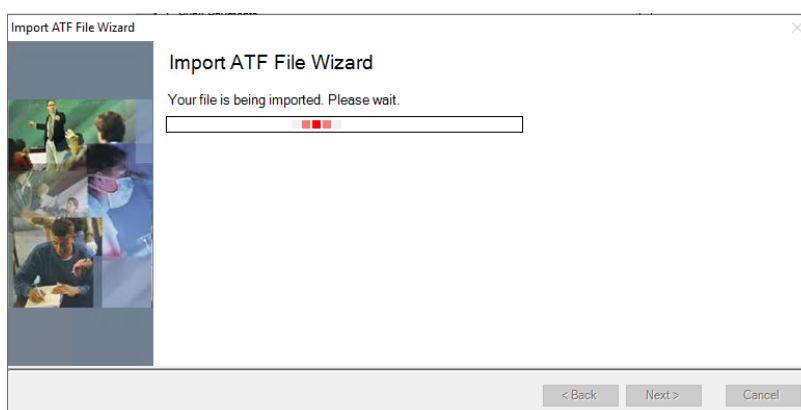


- You may then be presented with a list of contacts to match with those already on your database.

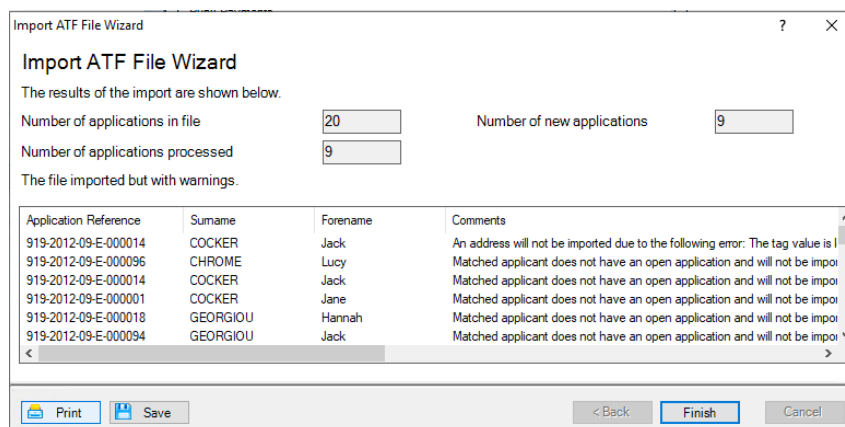
- If you believe that the system has matched the person correctly, please leave the tick next to the person that is the correct match.
- If they are different people select **New person**.
- A match will not be made automatically if a record has a different title or address, even if it is the same address typed in differently. If the contacts are the same person move the tick from **New person** to the correct name.

New contacts to your school will not show on this list but will be imported with the applicants.

10. When you have completed this process click **Next** and the file will be imported.



11. At the end of the import process, the wizard will display a list of any warnings or errors encountered – click **Save** and follow the prompts to save the warnings report in a convenient location:



12. You can also click **Print** to produce a log file. Click **OK** to open the log in your web browser.
13. Once Internet Explorer has opened, ensure that back in SIMS you click **Finish** and then **Yes** at the prompt to close the **Import ATF File Wizard**.

Import Log

You can then view the opened log:


| Error ID | Application Ref Number | Pupil Forename | Pupil Surname | Description | Is Critical |
|----------|------------------------|----------------|---------------|---|-------------|
| 0 | 919-2010-09-K-447415 | Sarah | Young | Application status of Applied has been changed to Offered | F |
| 61344 | 919-2010-09-K-447415 | Sarah | Young | The number 07948556231 for Contact Susan Bayonne already exists. It will not be imported. | F |

You can then print the log if you wish, or choose **File > Save As** to save it to a location of your choice. Many errors in the log file will relate to how the import process has handled telephone numbers, but you may get some errors that address information is missing – if this is the case, then the address will not have been imported at all.

Maintaining Applicant Records

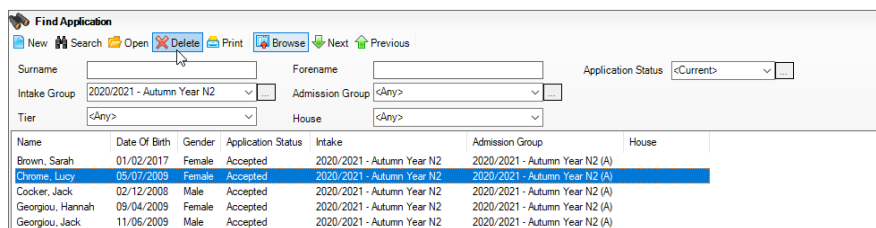
You can now access and edit the new applications. You can check on any applicants where the addresses have not been imported, and add them manually. If there are applications from students that you know will definitely NOT be coming to your school you can either change the application status to **Withdrawn**, or you can delete the record. See document **dms195 – Applicants and Admission Groups** for further information on maintaining applicant records.

View Applicant Records

To access the applicants go to **Focus > Admission > Application**. Select the intake group and click **Search** or select the **Application Icon** at the top of the screen .

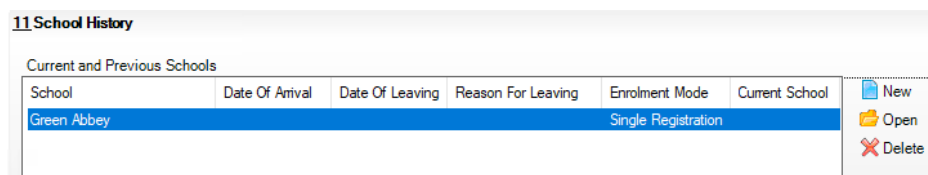
Delete Unwanted Applicants

To delete an application, highlight the name in the **Browse** (do not double click to open the record) and then click the **Delete** button. If you have a lot of applicants to delete your SIMS may crash and close. If this happens, log back into SIMS and continue.



| Name | Date Of Birth | Gender | Application Status | Intake | Admission Group | House |
|------------------|---------------|--------|--------------------|----------------------------|--------------------------------|-------|
| Brown, Sarah | 01/02/2017 | Female | Accepted | 2020/2021 - Autumn Year N2 | 2020/2021 - Autumn Year N2 (A) | |
| Chrome, Lucy | 05/07/2009 | Female | Accepted | 2020/2021 - Autumn Year N2 | 2020/2021 - Autumn Year N2 (A) | |
| Cooker, Jack | 02/12/2008 | Male | Accepted | 2020/2021 - Autumn Year N2 | 2020/2021 - Autumn Year N2 (A) | |
| Georgiou, Hannah | 09/04/2009 | Female | Accepted | 2020/2021 - Autumn Year N2 | 2020/2021 - Autumn Year N2 (A) | |
| Georgiou, Jack | 11/06/2009 | Male | Accepted | 2020/2021 - Autumn Year N2 | 2020/2021 - Autumn Year N2 (A) | |

If Unable to Edit Applicants



| School | Date Of Arrival | Date Of Leaving | Reason For Leaving | Enrolment Mode | Current School |
|-------------|-----------------|-----------------|--------------------|---------------------|----------------|
| Green Abbey | | | | Single Registration | |




We have seen a problem where a record will not save. Go to the School History panel, there could be an unwanted entry in the previous schools panel. Highlight the entry and click **Delete** and then click **Save**.

Edit Applicants



You can now access applicants and check the data. Applicants will have a status of **Offered** or **Accepted**. If you have the information you can add further contacts, class information, ethnicity and part time dates.

Sibling Links

If you matched the contacts correctly during the import your Family Links will be created already. If any of your new admissions are missing family links you will need to create new ones.

1. Open the record of the new applicant by going to **Focus > Admission > Application** or select the **Application Icon** at the top of the screen .
2. Click on the **Delete** button  adjacent to the **Contacts** panel to remove the existing contact.
3. Click on the **Copy** button  adjacent to the **Contacts** panel to display the **Copy Contacts** box.
4. Search for the sibling whose contacts you wish to copy, and then double click on their name to view their existing **Contacts**.



5. The contacts required for copying to the new student can be selected individually by selecting the check boxes next to their names, or they can all be selected or deselected using the **Check All**  and **Uncheck All**  buttons.
6. When you have made your selection from the contacts listed, click **OK**. This will populate the **Contacts** panel with the copied contacts.
7. Save the record, and the **Family Link** will be created.

Transferring Applicants between Admission Groups and Admissions Routine

You may need to refer to document **DMS195 Applicants and Admission Groups** for help with these tasks. The latest version of this document can be downloaded from the DMS Portal at:

http://bit.ly/dms_studentrec



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