

Tidying and Merging Address Details

Overview of Tidying Addresses

The Address Tidy routine is used to review addresses stored in SIMS, identify those that contain erroneous or incorrectly formatted information, and wherever possible, make applicable changes to ensure addresses are accurate and uniformly formatted. A report identifying the proposed changes is produced, which can be checked before proceeding.

Address tidying can involve moving data between fields, (e.g. a post code that has been incorrectly entered in the **Town** field is moved to the **Post Code** field), moving telephone numbers and email addresses to their proper locations, or correcting the formatting in various ways (e.g. changing the capitalisation of county information).

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 (e.g. moving a post code incorrectly stored in the **Town** field, to the **Post Code** field, may then match another address based on that post code). Such addresses can subsequently be merged by the Address Merge routine.

When tidying addresses, all addresses that have not yet been validated are considered for tidying, including school and agency addresses. A count is applied to each address to ensure that it is included in the Address Tidy routine a maximum of two times only. This ensures that any manual changes to addresses are not overwritten by the Address Tidy routine in the future. It also reduces the number of addresses that need to be tidied and therefore increases the performance.

The Address Tidy routine should be run twice, because 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 to be made.

It is therefore recommended that the Address Tidy routine is run either twice in succession, or ideally, within the same day. You should make any necessary further manual corrections to addresses only after the second run of the routine. This ensures that any addresses edited manually, are not affected by subsequent tidy routines.

Any new addresses added to the database since the tidy routine has been run are available for tidying twice.

Overview of Merging Duplicate Addresses

Duplicate addresses may exist in SIMS, because they have been double entered, or imported from an incorrectly formatted 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.

Running the Unmatchable Address Report

The Unmatchable Address report identifies any addresses that:

- are too incomplete to represent a unique residence
- have data in incorrect fields (e.g. post code data in the **Town** field)
- contain superfluous data such as phone numbers or other contact details.

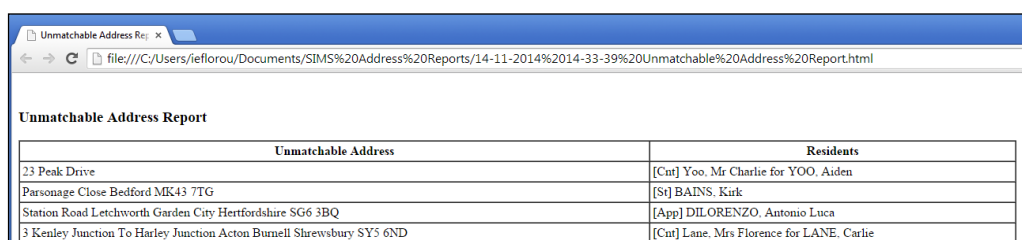
It is advisable to run this report before running the Tidy and Merge Addresses routine for the following reasons:

- It identifies addresses that obviously contain non-address information (e.g. telephone numbers, people's names, etc.), which can then be manually corrected.

NOTE: This is particularly important because any phone numbers or email addresses found in address fields are removed during the tidy process, and assigned to all the residents living at that address. You may therefore wish to manually move this information before proceeding with the tidy routine.

- 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.

Select **Tools | Housekeeping | Bulk Address Tools | Unmatchable Address Report** to display the report in your web browser (the report may take a short while to display).



The screenshot shows a web browser window with the title 'Unmatchable Address Report'. The address bar shows a file path: 'file:///C:/Users/iefflorou/Documents/SIMS%20Address%20Reports/14-11-2014%2014-33-39%20Unmatchable%20Address%20Report.html'. The report content is as follows:

Unmatchable Address	Residents
23 Peak Drive	[Cnt] Yoo, Mr Charlie for YOO, Aiden
Parsonage Close Bedford MK43 7TG	[St] BAINS, Kirk
Station Road Letchworth Garden City Hertfordshire SG6 3BQ	[App] DILORENZO, Antonio Luca
3 Kenley Junction To Harley Junction Acton Bunnell Shrewsbury SY5 6ND	[Cnt] Lane, Mrs Florence for LANE, Carlie

The report lists any unmatched addresses together with the name of the people who are residents at the address. It is recommended that these addresses are manually edited before proceeding further.

The report is saved to the following folder in both .html and .txt format:

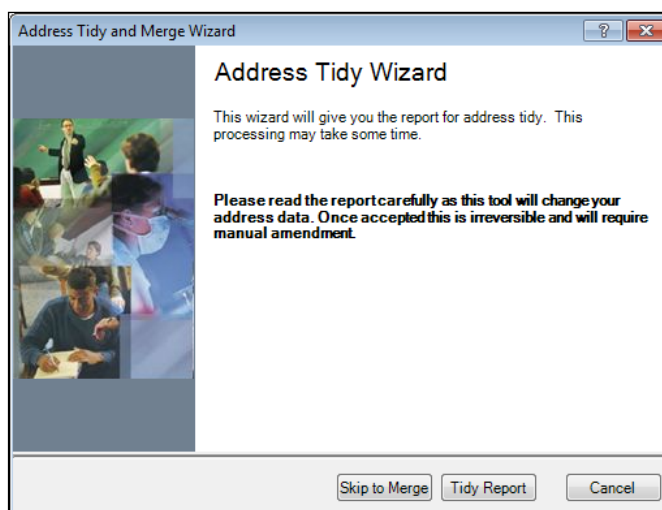
C:\Documents and Settings\<Username>\My Documents\SIMS Address Reports

Tidying Address Data

It is recommended that you run the Unmatchable Address report as described in the previous section before proceeding. Due to the memory intensive nature of this routine, it is recommended that all other users log out of SIMS when this routine is run.

IMPORTANT NOTE: Please carry out a full backup of the SIMS database before running either of tidy or merge routines.

1. Select **Tools | Housekeeping | Bulk Address Tools | Tidy and Merge Addresses** to display the **Address Tidy and Merge** wizard.



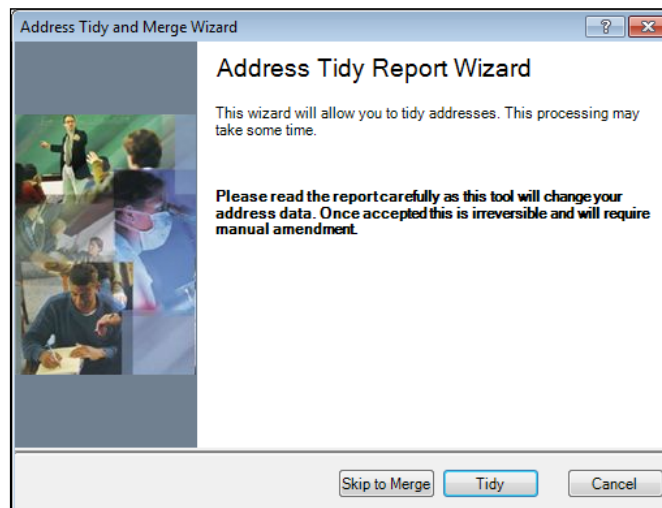
2. You must run the Tidy report before the tidy process can be run. Click the **Tidy Report** button to produce the Address Tidy report (this may take several minutes to complete).

The report lists any incorrectly formatted addresses, together with the suggested reformat that will occur once the tidy and merge process has been run. It also shows the residents recorded as living at the address because their records are affected when the address is tidied.

Address Type	Apartment	House Name	House Number	Street Description	District	Town	County	Post Code	Country	Residents
Before	-	Kingfisher Lodge	-	-	Wharley End, Cranfield	Bedford	Bedfordshire	MK43 0AP	United Kingdom	<none, ever>
After b0	<<DELETE>>	-	-	-	-	-	-	-	-	as above
Before	-	Havelock Road Junior Department	-	-	Wolverton	East Town	Eastshire	SI3 7ND	United Kingdom	<none, ever>

WARNING: Please check the report very carefully before clicking the **Tidy** button. The tidy process will permanently change the address data stored in SIMS. Any addresses that are incorrectly tidied will have to be manually amended.

Once the Address Tidy report has been produced, review the content and make any required manual changes. Click the **Tidy** button to initiate the tidy process (this may take several minutes to complete).



The reports are saved to the following folder in both .html and .txt format.

C:\Documents and Settings\<Username>\My Documents\SIMS
Address Reports

The text document also includes tables of abbreviations that are used to identify for example, that 'Drive' might be abbreviated to 'Dr' or 'Drv'.

Once the tidy process has been completed, it is recommended that you run the process a second time and then run and check the Unmatchable Addresses report again. Any addresses that still feature in the list probably require some manual amendment. They may not be complete enough to identify a unique residence, or may contain non-address information that needs to be moved.

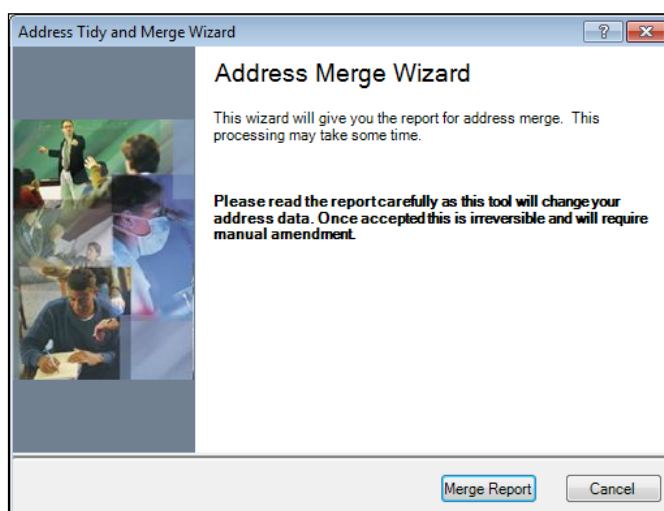
Merging Address Data

It is recommended that you run the **Unmatchable Address** report before proceeding. It is also strongly recommended that you run the Address Tidy routine (as described in the previous section) before merging address data because the tidy process increases the chances of duplicate addresses being identified.

Due to the memory intensive nature of this routine, it is recommended that all other users log out of SIMS when this routine is run.

IMPORTANT NOTE: Please carry out a full backup of the SIMS database before running the tidy or merge routines.

1. From the **Address Tidy and Merge** wizard, click the **Skip to Merge** button and then the **Merge Report** button to produce the Address Merge report (this may take several minutes to compile).



The report lists all duplicate addresses that will be merged into a single address, together with the residents who are recorded as living at the addresses about to be merged.

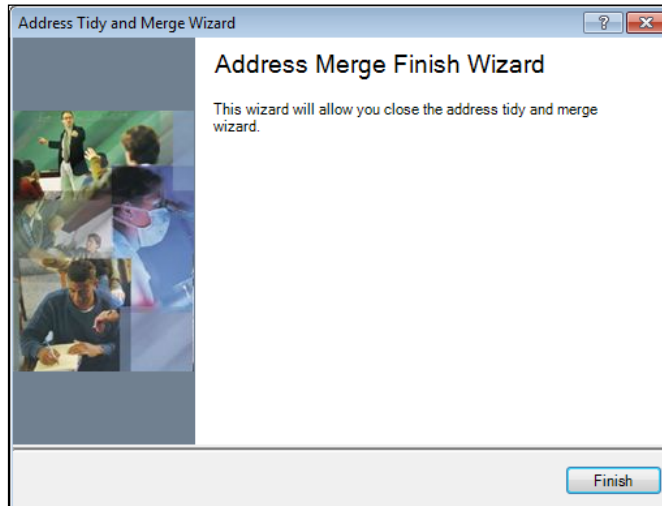
Status	Apartment	House Name	House Number	Street Description	District	Town	County	Post Code	Country	Residents
Original	-	-	14	Arthur Street	-	Lincoln	-	LN5 7UH	215	[ApRel] Bradbury, Ms B for BRADBURY, Christina
Original	-	-	14	Arthur Street	-	Lincoln	-	LN5 7UH	-	[xSt] TATE, Kate Lauren
Merged	-	-	14	Arthur Street	-	Lincoln	-	LN5 7UH	215	as above

WARNING: Please check the report very carefully before clicking the **Merge** button. The merge process will permanently change the address data stored in SIMS. Any addresses that are incorrectly merged will have to be manually recreated.

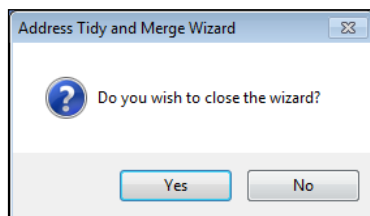
2. Once the Address Merge report has been produced, reviewed and printed, click the **Merge** button to start the merge process. This may take several minutes to complete.

The report is saved to the following folder in .html format:

C:\Documents and Settings\<Username>\My Documents\SIMS
Address Reports



3. Click the **Finish** button to close the wizard.



4. Click the **Yes** button to complete the process.

