

## Validating Addresses in Bulk

*NOTE: Bulk Address Validation requires a Licence Key which can be obtained from your Local Support Unit. Only users with System Administrator, Admissions Officer or Administration Assistant permissions can carry out this process.*

In addition to validating individual addresses within SIMS, it is also possible to select batches of addresses stored in SIMS to be automatically sent to the Address Validation Service for validation. For example, a School Administrator can elect to validate addresses for a specific year group, or after importing groups of pupil/students via CTF or ATF.

This is achieved by setting up a Bulk Address Validation scheduled task which is then sent to the Address Validation Service at the time specified in the task. The validated batches are then returned, enabling you to choose which existing addresses should be replaced with the validated address. The scheduled task must be set up before Bulk Address Validation can be run.

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

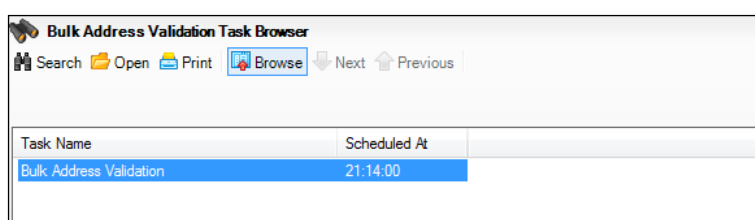
## Adding/Editing a Scheduled Task for Bulk Address Validation

Before being able to use the Bulk Address Validation functionality, you must firstly create a scheduled task. The task can be set up from any SIMS workstation, but the scheduled task itself is created on the SIMS SQL Server.

Once set up, the scheduled task will run at the time specified until it is de-activated or the details of the task are amended.

For security reasons, it is recommended that a new network user is created specifically to set up the scheduled task.

1. Select **Tools | Housekeeping | Bulk Address Validation Scheduler** to display the **Bulk Address Validation Task** browser.



2. Click the **Search** button then double-click the **Bulk Address Validation** task to display the **Bulk Address Validation Scheduler** page.

**1 Scheduler Setting**

Scheduler Active ☒

Description

☐ Sunday

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☐ Saturday

Times Excluded:

Description

☐ 20:00-22:00

☐ 22:00-00:00

☐ 00:00-02:00

☒ 02:00-04:00

☒ 04:00-06:00

Network User Login Details - User must be able to access the internet: SET UP

Proxy Required ☒

Network User  Network Password

Domain

Proxy URL

Test Internet Connection

3. In the **Scheduler Setting** panel, specify the day of the week on which the scheduled task should be run by selecting the applicable day check box.

4. 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. The **Times Excluded** section enables you to specify any periods of time when the address batches should not be sent for validation by selecting the required check boxes. At least one period of time must remain deselected to enable the address batches to be sent for validation.
5. 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.

*NOTE: To enable you to access external services such as the Address Validation Service through the safety of a protected internet connection, you can specify the location of a default proxy server to filter requests and protect the integrity of your secure network. It is the responsibility of schools to ensure that credentials are managed correctly to prevent unauthorised access.*

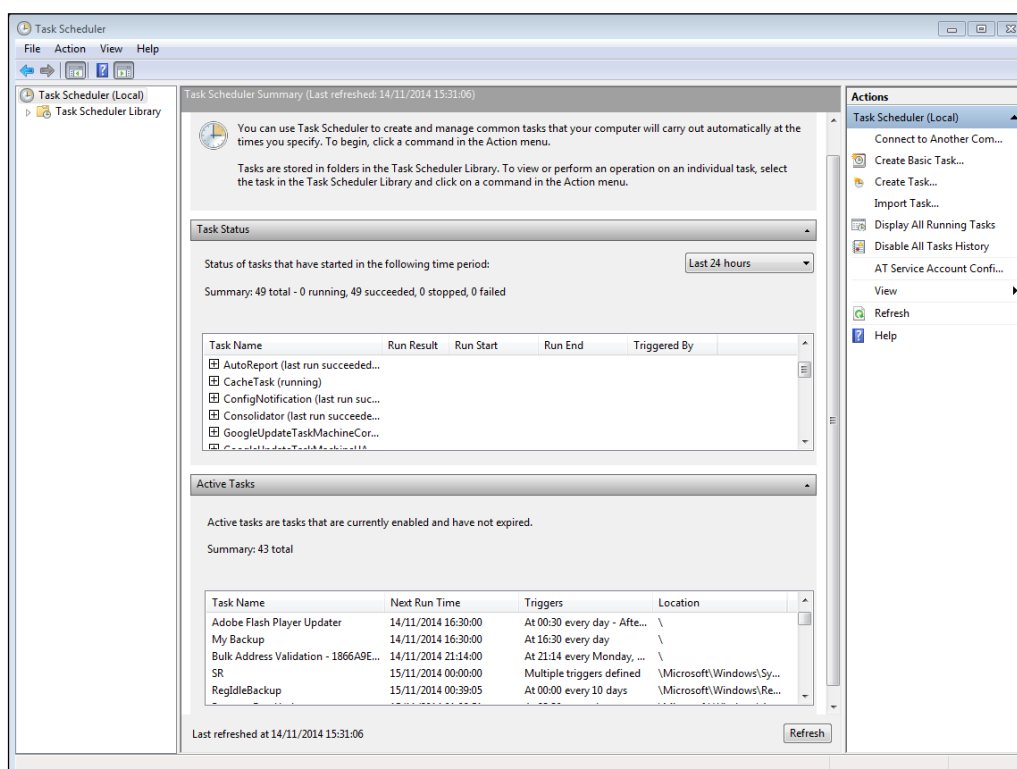
6. Click the **Test** button to test the internet connection.
7. Ensure the **Scheduler Active** check box is selected if you want the scheduled task to run at the next available scheduled time.
8. Click the **Save** button on the toolbar to save the scheduled task. The updated details are then displayed in the **Bulk Address Validation Task** browser.

*NOTE: A random time is displayed in the **Scheduled At** column. This random time will change each time the scheduled task is amended and saved.*

If the scheduled task is not amended or de-activated, it will continue to run as specified.

9. To check that the scheduled task has been successfully created, from the SIMS SQL Server machine, select **Start | All Programs | Accessories | System Tools | Task Scheduler** to display the **Task Scheduler** window.

In the **Active Tasks** panel, the task is displayed as **Bulk Address Validation** followed by a string of numbers under the **Task Name** heading, as shown in the following graphic.



If the task is not visible, check that the **Scheduler Active** check box has been selected and resave if necessary.

## Creating Batches of Addresses for Validation

Once the Address Validation Schedule Task has been set up (as described in the previous section), batches of addresses can be sent to Address Validation Service. Batches can include addresses from different address categories including the following:

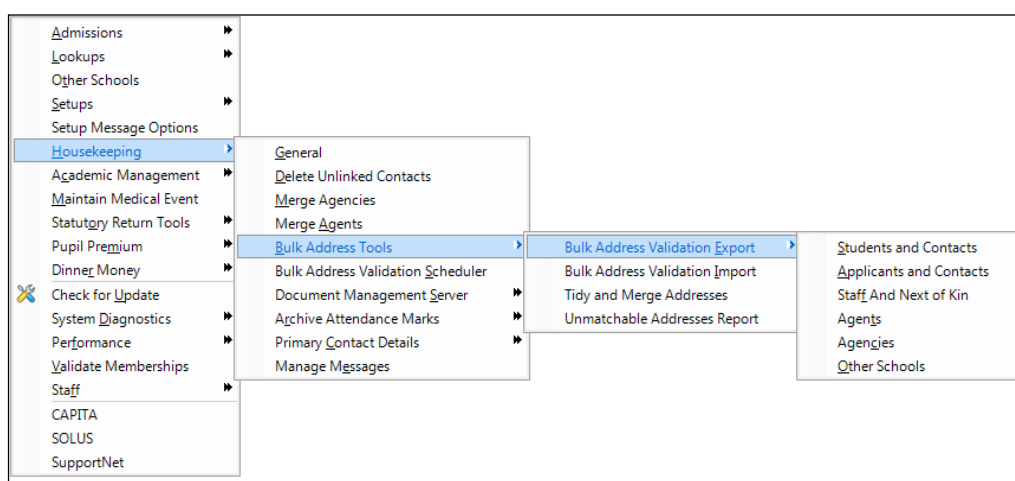
- Students and contacts
- Applicants and contacts
- Staff and next of kin
- Agents
- Agencies
- Other Schools

It is strongly recommended that the Tidy and Merge Address routines are run prior to creating address batches for export to the Address Validation Service. This ensures that the addresses contained in the batches are uniformly formatted and that duplicates have been removed thus increasing the chances of successful validation using the Address Validation Service.

*NOTE: Only addresses that have not been previously validated are made available for selection. Previous addresses will not be included. Addresses in Northern Ireland and other overseas addresses are included in the address batch but these addresses will not be validated by the Bulk Address Validation Service.*

It is possible for address batches to contain large numbers of addresses that require validating. If an address batch contains more than 1000, the scheduled task will continue to send the batch to the Address Validation Service until all the addresses in the batch have been validated.

1. Select **Tools | Housekeeping | Bulk Address Tools | Bulk Address Validation Export** followed by the address category, e.g. **Staff And Next of Kin**.



2. The **Bulk Address Validation Selection** browser is displayed. Click the **Search** button.

With the exception of Students and Contacts, all available addresses are immediately displayed. For Students and Contacts, the number of addresses returned can be restricted using the applicable search fields and drop-down list. For example, you could run batches of addresses for each **Year Group**.

Apartment	House Number	House Name	Street	District	Town/City	County	Country	Post Code
	110	Riverside Gallery		East Town	Eastshire	United Kingdom	S11 1BX	
	93	Benwick Avenue		East Town	Eastshire	United Kingdom	S11 2NR	
	103	Sultan Road		East Town	Eastshire	United Kingdom	S11 2SR	
	67	Swallow Drive		East Town	Eastshire	United Kingdom	S11 4UE	
	17	Millers Green		East Town	Eastshire	United Kingdom	S11 2UB	

- Once the required addresses are displayed, click the **Save** button to save the address batch. Please check that this is the batch you wish to add as once created, batches cannot be deleted.

- A message is displayed showing the name of the created batch, together with the date and time created.

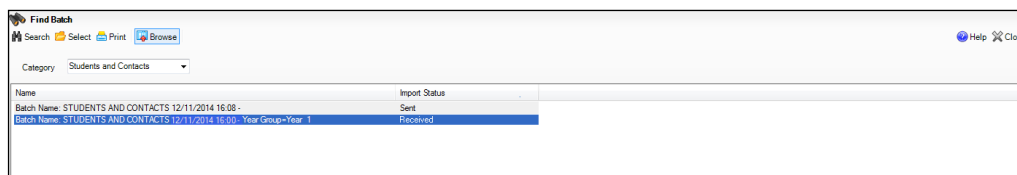
Once saved, the address batch is sent to the Address Validation Service at the time specified in the Address Validation Scheduled Task.

## Reviewing and Matching Validated Addresses

Once the validated address batch has been received back from the Address Validation Service, the validated addresses must then be matched with the existing addresses in SIMS.

Once matched, the records of all the people living at the matched address are updated.

1. Select **Tools | Housekeeping | Bulk Address Tools | Bulk Address Validation Import** to display the **Find Batch** browser.



2. Select the required address **Category** from the drop-down list then click the **Search** button.

Any previously created address batches for the selected address category are displayed.

Each address batch has a unique **Name** that describes the contents of the batch and when it was created, e.g. Students and Contacts 12/11/14 16.00 - Status=Current Year Group=Year 1. The batch highlighted in the previous graphic shows that it contains address details for Students and Contacts in Year Group 1 and that it was created on the 12/11/14 at 16:00.

The **Import Status** is also displayed. A status of **Received** indicates that the address batch has been sent to Address Validation Service, validated and received back at the school. A status of **Sent** indicates that the address batch has been created and is sent for validation on the day and time specified in the Bulk Address Validation scheduled task.

*NOTE: Batches containing over 1000 addresses will continue to show a status of **Sent** until all the addresses contained within the batch have been validated.*

- Highlight the required address batch with an **Import Status** of **Received** then click the **Select** button to display the **Bulk Address Validation Import** page.

**Find Batch**

Search Select Print Browse

Category: Students and Contacts

Name	Import Status
Batch Name: STUDENTS AND CONTACTS 29/01/2008 16:24 - Status=Current Surname=st	Received
Batch Name: STUDENTS AND CONTACTS 29/01/2008 16:53 - Status=Current Surname=t	Sent

**Bulk Address Validation Import**

Save Undo

1 Single Address Matches Returned 2 Multiple Address Matches Returned 3 Imported Addresses Not Validated

**1 Single Address Matches Returned**

Select All Existing Select All Validated Minimise All Addresses Maximise All Addresses

Address Type	Apartment	House Name	House Number	Street	District	Town/City	Postcode	Selected Address
Address: 32 Alder Road Hampton Hargate Peterborough PE7 8BX								
Existing			32	Alder Road	Hampton Harg...	Peterborough	PE7 8BX	<input checked="" type="checkbox"/>
Validated			32	Alder Road	Hampton Harg...	Peterborough	PE7 8BX	<input type="checkbox"/>
Address: 6 Gainsborough Avenue Eaton Ford St Neots PE19 7RJ								
Existing			6	Gainsborough Avenue	Eaton Ford	St Neots	PE19 7RJ	<input checked="" type="checkbox"/>
Validated			6	Gainsborough Avenue	Eaton Ford	St Neots	PE19 7RJ	<input type="checkbox"/>

Print

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.

**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.

**Bulk Address Validation Import**

Save | Undo

1 Single Address Matches Returned    2 Multiple Address Matches Returned    3 Imported Addresses Not Validated

**1 Single Address Matches Returned**

Select All Existing    Select All Validated    Minimise All Addresses    Maximise All Addresses

Address Type	Apartment	House Name	House Number	Street	District	Town/City	Postcode	Selected Address
Address: 32 Alder Road Hampton Hargate Peterborough PE7 8BX								
Existing			32	Alder Road	Hampton Harg...	Peterborough	PE7 8BX	<input checked="" type="checkbox"/>
Validated			32	Alder Road	Hampton Harg...	Peterborough	PE7 8BX	<input type="checkbox"/>
Address: 6 Gainsborough Avenue Eaton Ford St Neots PE19 7RJ								
Existing			6	Gainsborough Avenue	Eaton Ford	St Neots	PE19 7RJ	<input checked="" type="checkbox"/>
Validated			6	Gainsborough Avenue	Eaton Ford	St Neots	PE19 7RJ	<input type="checkbox"/>

Print

The addresses are listed in pairs. Each pair of addresses contains the **Existing** address and the **Validated** address based on the House Name/House Number and Postcode.

After reviewing the details in the **Single Address Matches Returned** panel, a decision must be made whether to overwrite all the existing addresses with validated addresses or to overwrite only selected addresses.

*NOTE: Address lines can be minimised to show just the address by clicking the – icon adjacent to each address. Alternatively, click the **Minimise All Addresses** button to minimise the display for all addresses. Maximise the display again by clicking the + icon adjacent to each required address or clicking the **Maximise All Addresses** button.*

## Matching Addresses Individually

- To match addresses individually, for each address pair, 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).

Address: 32 Alder Road Hampton Hargate Peterborough PE7 8BX								
Existing			32	Alder Road	Hampton Harg...	Peterborough	PE7 8BX	<input checked="" type="checkbox"/>
Validated			32	Alder Road	Hampton Harg...	Peterborough	PE7 8BX	<input type="checkbox"/>

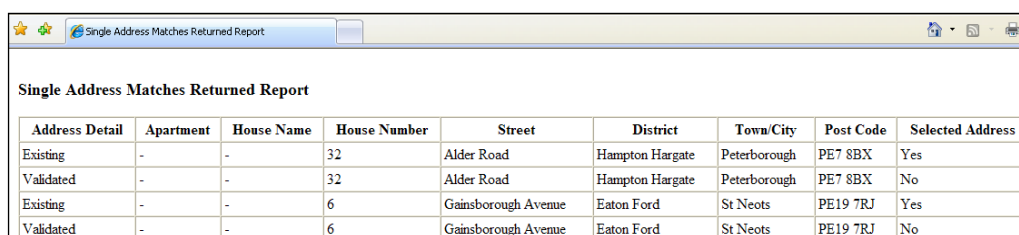
- Repeat for each address pair listed in the **Single Address Matches Returned** panel.
- Click the **Save** button to match the addresses as per your selections.

## Matching All Addresses

1. To retain all existing addresses, click the **Select All Existing** button. To retain all the validated addresses, click the **Select All Validated** button. This will automatically select all the applicable check boxes in the **Selected Address** column.
2. Click the **Save** button to match the addresses as per your selections.

## Printing Your Selections

If you want to retain a list of the selections made, click the **Print** button to produce a Single Address Matches Returned report displayed in your web browser.



Single Address Matches Returned Report

Address Detail	Apartment	House Name	House Number	Street	District	Town/City	Post Code	Selected Address
Existing	-	-	32	Alder Road	Hampton Hargate	Peterborough	PE7 8BX	Yes
Validated	-	-	32	Alder Road	Hampton Hargate	Peterborough	PE7 8BX	No
Existing	-	-	6	Gainsborough Avenue	Eaton Ford	St Neots	PE19 7RJ	Yes
Validated	-	-	6	Gainsborough Avenue	Eaton Ford	St Neots	PE19 7RJ	No

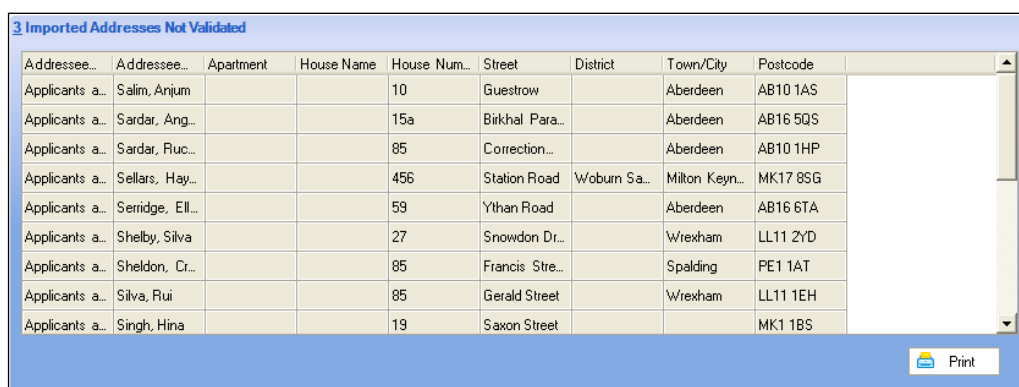
## Matching Multiple Addresses

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. Click the **Save** button to apply the changes.
2. 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. This information is read-only.



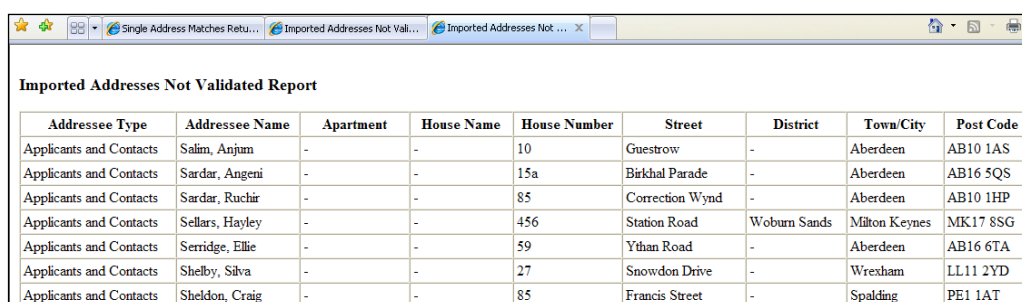
3 Imported Addresses Not Validated

Addressee...	Addressee...	Apartment	House Name	House Num...	Street	District	Town/City	Postcode
Applicants a...	Salim, Anjum			10	Guestrow		Aberdeen	AB10 1AS
Applicants a...	Sardar, Ang...			15a	Birkhal Para...		Aberdeen	AB16 5QS
Applicants a...	Sardar, Ruc...			85	Correction...		Aberdeen	AB10 1HP
Applicants a...	Sellers, Hay...			456	Station Road	Woburn Sa...	Milton Keyn...	MK17 8SG
Applicants a...	Serridge, Ell...			59	Ythan Road		Aberdeen	AB16 6TA
Applicants a...	Shelby, Silva			27	Snowdon Dr...		Wrexham	LL11 2YD
Applicants a...	Sheldon, Cr...			85	Francis Stre...		Spalding	PE1 1AT
Applicants a...	Silva, Rui			85	Gerald Street		Wrexham	LL11 1EH
Applicants a...	Singh, Hina			19	Saxon Street			MK1 1BS

Print

*NOTE: Addresses in Northern Ireland and other overseas addresses cannot be validated.*

Click the **Print** button to produce an html output of the Imported Addresses Not Validated report displayed in your web browser.



The screenshot shows a web browser window with three tabs. The active tab displays a report titled "Imported Addresses Not Validated Report". The report is a table with the following data:

Addressee Type	Addressee Name	Apartment	House Name	House Number	Street	District	Town/City	Post Code
Applicants and Contacts	Salm, Anjum	-	-	10	Guestrow	-	Aberdeen	AB10 1AS
Applicants and Contacts	Sardar, Angeni	-	-	15a	Birkhal Parade	-	Aberdeen	AB16 5QS
Applicants and Contacts	Sardar, Ruchir	-	-	85	Correction Wynd	-	Aberdeen	AB10 1HP
Applicants and Contacts	Sellars, Hayley	-	-	456	Station Road	Woburn Sands	Milton Keynes	MK17 8SG
Applicants and Contacts	Serridge, Ellie	-	-	59	Ythan Road	-	Aberdeen	AB16 6TA
Applicants and Contacts	Shelby, Silva	-	-	27	Snowdon Drive	-	Wrexham	LL11 2YD
Applicants and Contacts	Sheldon, Craig	-	-	85	Francis Street	-	Spalding	PE1 1AT

If the address batch contains only overseas addresses and therefore, no addresses that could be matched, click the **Remove** button to delete the entire batch. If this is the case, the **Save** button remains greyed out.

## Viewing the Bulk Address Validation Log File

The first time an address batch is received from the Address Validation Service, a LogFile.txt file is created in the Binn folder of your SQL installation. This will typically be in the following location:

```
C:\Program Files\Microsoft SQL
Server\MSSQL11.SIMS2012\MSSQL\Binn
```

Each subsequent time a batch is received, an additional entry is appended to the LogFile.txt listing the **Date**, the **Time**, the ID of the **Computer** importing the batch, together with any **Message(s)**. The **Messages** might show the number of addresses that have been validated successfully or an error message advising why the validation failed.

Double-click the file to view the contents.



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