

## Phoenix Gold

### Transfer of Pupil Data between Norfolk Schools (Anycomms)

#### Part 1. Individual pupils leaving during the academic year.

The DfES requires that when pupils move from one school to another ( either during the school year or at year end), the pupil data should be transferred to the next school electronically.

This helpsheet details how pupil datafiles can be **transferred between Norfolk schools** using the County's **Anycomms (AVCO)** Secure File Transfer System.

**Part 1** describes the method of creating transfer files for individual pupils leaving **during the academic year**. Copies can be downloaded from the ICT Solutions website at <http://ictsolutions.norfolk.gov.uk/phoenix/phoenixmain.asp>

The processes involved are:

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**Part 2** describes the method of creating transfer files for pupils within a year group leaving at the **end of the academic year**, ie at Roll Over time and is available as a separate helpsheet.

## **PART 1 CREATING A TRANSFER FILE FOR A PUPIL OR PUPILS LEAVING DURING THE ACADEMIC YEAR.**

### ***Before creating or receiving a transfer file:-***

- ***the destination/previous school details held in Associated Schools must be correct.***
- ***Reasons for Leaving must cross reference with the latest DfES codes.***

### **Checking Associated Schools.**

- In Phoenix, from the **Main Menu**, go to **Associated schools > Records**
- Click  **Find** and search on the name of the Destination school that the pupil is transferring to, or Feeder school, if the pupil is moving to your school.
- Ensure a tick is placed in the **Next School** and/or **Feeder School** box.
- Click **Edit** if you need to modify these fields.
- If the **DfES** and **LEA** codes are incorrect or missing, select the Pen Dropper.   
From the list displayed, double click the correct school to update your records.

### **Updating Reason for Leaving Codes in Phoenix**

Reasons for Leaving codes must be correctly cross-referenced to a DfES category. If your local leaving categories are incorrect, the best solution is to delete your old codes and create new ones.

- In **Phoenix**, from the **Main Menu**, go to **Pupil Records > Lookup Tables > Reasons for Leaving**.
- **Highlight** each **Local Category** in turn, from the list on the left and **Delete**.
- **Click** on **Copy Standard Categories** to copy all new codes.
- **Delete** from the new local categories any that do not apply to your school.

## 1. Mini-Datafile

This Section details the procedure when both the sending and receiving school use Phoenix Gold.

### 1.1. Creating a Mini Datafile for a pupil or pupils transferring during term time.

*In this process a transfer file is created for each destination school, so if you have pupils leaving and transferring to different schools, you need only run this process once to create the necessary files.*

- In Phoenix, go to **System Management > Data Management > Data Exchange**.
- Check that the location of the **Data Exchange Folder** is correct. E.g. Usually D:\Phoenix\DataExchange\ if Phoenix is not on a Server.
- Select **Pupil Transfer: Export leavers**.
- Click **Continue**
- Hold the **Ctrl** key down and click the button **Select Year to Export**.

- In the screen **Select Groups**, tick the box **Selected Pupils only**.
- **Select** pupils from Year Groups, Forms, etc. (Hold down the Ctrl Key to select from more than one group)
- Select your leavers from the list and click **Continue**.
- Click **Quick Edit School Destination**. Highlight the pupils and their Destination School. (more than one destination school can be selected). Click **Edit Selected Records**. Click **Close**.

Year Group	Pupil Nos
Year 1	12
Year 2	25
Year 3	12
Year 4	19
Year 5	17
Year 6	20
Reception	14

- Click **Quick Edit Leaving Reason** and enter the correct reason for leaving. Click **Edit Selected Records**. Click **Close**
- **Quick Edit Leaving date**. Click **OK** without entering a default leaving date. Enter a Leaving date and click **OK** for each pupil listed. Click **Finish**.
- Click **Select Schools**. Select the school or schools and click **OK**
- Ensure the **Export Type** is set to **mini datafile**.

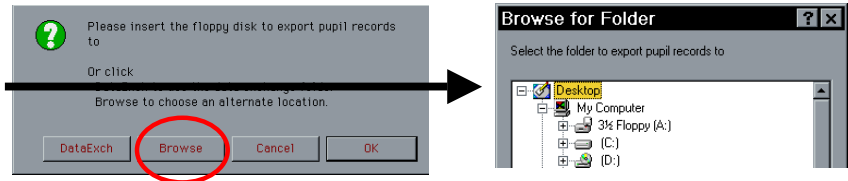
Export Type

☒ Create mini datafile  
(all pupil, assessment and LEA extra items transferred)

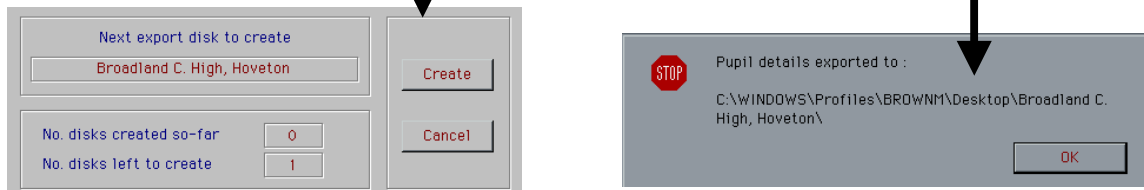
☐ Create CTF  
(Common Transfer XML - For English schools)

- Click **Create Export Disks**.

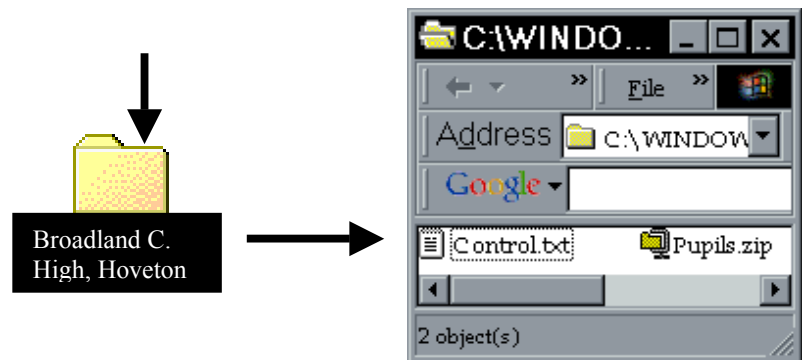
- Click **Browse** and select the **Desktop** as the location for your export file.



- Click **OK** and then click **Create** to place your export file on the desktop of your computer.



A named transfer school folder (eg Broadland C. High, Hoveton) will be created on your desktop for each export file created. Each folder will contain two files:- **Control.txt** and **Pupils.zip**..



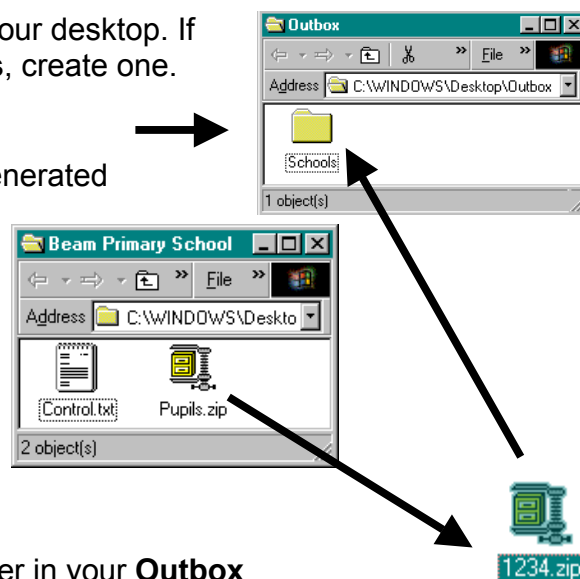
- The records of the transferred pupils held in Phoenix, should now be archived to **Leavers**

## 1.2. Sending a mini datafile via Anycomms

*You need to be at the computer that has the Anycomms software on it. (There will be an Inbox, Outbox and Archive folder on the desktop)*

- Check your Anycomms **Outbox** folder on your desktop. If there is not a folder within it called **Schools**, create one. Leave the Outbox folder open.

- Find the folder on your desktop that was generated when you created your transfer file. (If this is on a different computer you will need to copy it to the one you are on now.) Open the folder and Rename<sup>1</sup> the **Pupils.zip** file within it, to **xxxx.zip** where **xxxx** is the destination school's **four digit DfES** number. If unsure, the DfES code can be found in the school's record in **Associated schools**.



- **Copy** the **renamed** file to the **Schools** folder in your **Outbox**
- **Delete** the named transfer school folder on the desktop and its contents.
- **Start Anycomms** by doubleclicking on the **AnyComms Client** icon. The transfer bar should go blue indicating that the file is being transferred.

When the transfer has finished a notepad file will open displaying the following message, indicating that the transfer file has been successfully downloaded.

*"The following Phoenix CTF file(s) have been uploaded to the LEA  
xxxx.zip was renamed as 926yyyy\_CTF\_926xxxx.zip for (name of destination school)"*

(xxxx = destination school DfES no)

(yyyy = your schools DfES no)

- **E-mail the destination school** and notify them that a transfer file has been **despatched via AnyComms**.

<sup>1</sup> To rename a file right click on the filename, drag to Rename and left click.

### 1.3. Receiving a Mini Datafile via Anycomms

When notified by a Feeder school that a transfer file has been despatched via AnyComms,

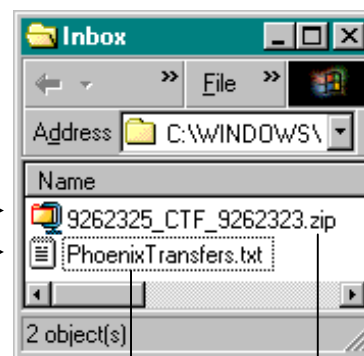
- Start **Anycomms** by doubleclicking on the **AnyComms Client** icon.



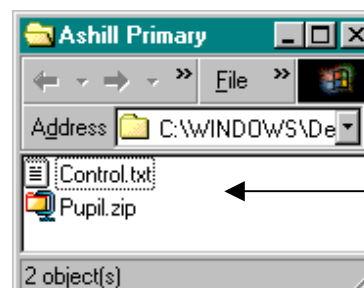
The file will be downloaded to the AnyComms **Inbox** folder. The following Notepad message will be displayed.

*"The following Phoenix CTF file(s) have been downloaded from the LEA  
926yyyy\_CTF\_926xxxx.zip"  
(yyyy = feeder school DfES no)  
(xxxx = schools DfES no)*

- In your AnyComms **Inbox** find 926yyyy\_CTF\_926xxxx.zip and **rename** it to **Pupils.zip**
- Also in your AnyComms **Inbox** find the file **PhoenixTransfers.txt** and **rename** it to **Control.txt**



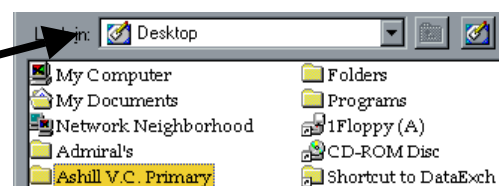
- Create a folder on the **desktop**. Title it with the name of the feeder school. e.g. **Ashill Primary**.
- Copy and paste the files, **Control.txt** and **Pupils.zip** from the AnyComms **Inbox** to this folder.
- If Phoenix is not on this computer, copy the folder to the desktop of the computer you use for Phoenix.



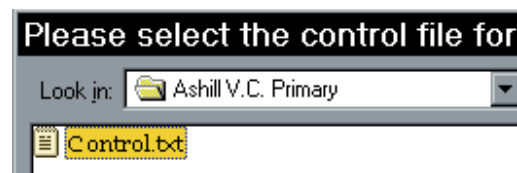
## 1.4.Importing a Mini Datafile into Phoenix

- In Phoenix go to **System Management > Data Management > Data Exchange.**
- Select **Pupil Transfer: Import New Intake**
- Click **Continue**

- Click the **Browse** button and browse to the desktop
- **Select and Open** the folder you created on your desktop containing your renamed transfer files. e.g. **Ashill Primary.**



- Select and open the file, **Control.txt**



The **Import Leavers from Pupil Transfer** screen will be displayed.

- Enter an **Admission date.**
- Allocate a **Year Group** for the imported pupil.

**NOTE:** If the admission date is current then your current year groups will be offered. If the admission date is a future date then a New Intake category will be offered for selection. The pupil will then be enrolled automatically when their admission date becomes current.

Code	Name	Count
N	Nursery	26
R	Reception	46
V1	Year 1	11
V2	Year 2	25
V3	Year 3	10
V4	Year 4	19
V5	Year 5	17
V6	Year 6	18

- Tick the appropriate **Import** checkbox. (e.g. if the pupil record already exists and this transfer file contains updated assessment scores, tick only **the Import latest assessment results** box.)
- Select the **Previous school** from the list supplied.

- Click **Import Data**


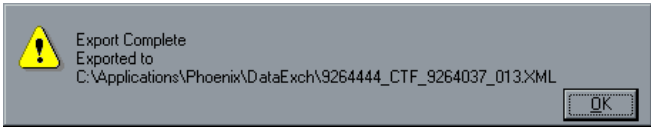


- Close back to the **Main Menu** then go to **Pupil Records** and make a thorough check of the imported data.  
Allocate a class if this is the first time data has been imported for this pupil.

## 2 CTF Format

This Section deals the procedure when either the sending or the receiving schools in Norfolk does NOT use Phoenix. ( All LEA schools in Norfolk use Phoenix except for 13 High schools).

### 2.1.To create a CTF file for an individual pupil from pupil records

- In Phoenix go to **Pupil Records**.
- Find the record of the pupil who is leaving.
- In the **Core Pupil Information screen**, click the blue navigation button on the right of the screen, to display **Other**.
- From the list displayed, Select **Leaving Details**.
- The **Reason for Leaving**, **Destination on Leaving** and **Leaving Date** must be entered.
- Click **Export to CTF**
- Click **OK to Export Complete**. Note the format and location of the file.
- Archive the pupil to Leavers



## 2.2. To create a CTF file for more than one leaver

*In this process a transfer file is created for each destination school, so if you have pupils leaving who are going to different schools you need only run this process once to create the necessary files.*

- In Phoenix, go to **System Management > Data Management > Data Exchange**.
- Check that the location of the **Data Exchange Folder** is correct. E.g. Usually D:\Phoenix\DataExchange\ if Phoenix is not on a Server.
- Select **Pupil Transfer: Export leavers**.
- Click **Continue**
- Hold the **Ctrl** key down and click the button **Select Year to Export**.

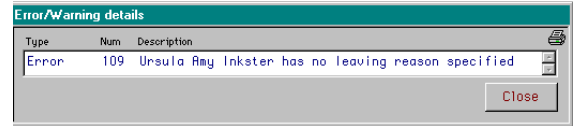
- In the screen **Select Groups**, tick the box **Selected Pupils only**.

Year Group	Pupil Nos
Year 1	12
Year 2	25
Year 3	12
Year 4	19
Year 5	17
Year 6	20
Reception	14

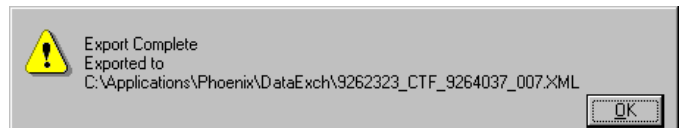
- **Select** pupils from Year Groups, Forms, etc. (Hold down the Ctrl Key to select from more than one group)
- Select your leavers from the list and click **Continue**.
- Click **Quick Edit School Destination**.
- **Highlight** the pupils and **their Destination School**. (more than one destination school can be selected)
- Click **Edit Selected Records**.

- Click **Quick Edit Leaving Reason** and enter the correct reason for leaving.
- **Quick Edit the Leaving date**. Click **OK** without entering a default leaving date. Enter a Leaving date and click **OK** for each pupil listed. Click **Finish**.
- Click **Select Schools**.
- Ensure the **Export Type** is set to **Create CTF**
- Click **Create Export Files**.

- If a window displays advising errors and warnings click **View Details**.
- Display the errors, then **close** the error/warning details window.
- Click **cancel** on the error screen. Correct the errors and re-create the export file.



Each CTF File created will be saved in your Data Exchange Folder →

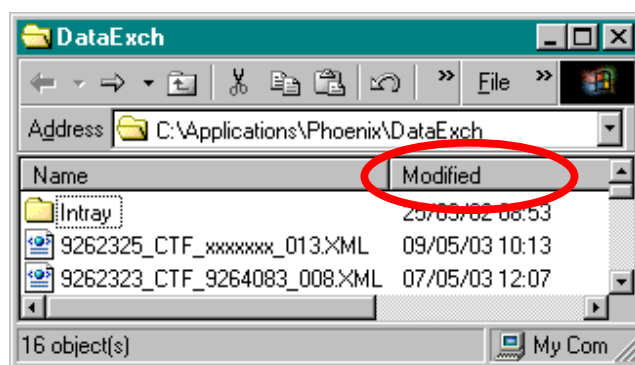


- When the export file/s have been created, **archive** the pupil/s to Leavers.

*Each CTF will be named xxxxxxxx\_CTF\_yyyyyyy\_001.XML where xxxxxxxx is the LEA and DfES number of the exporting school and yyyyyyy is the LEA and DfES number of the destination school. The numerical value will increase by one each time you create a CTF file.*

## 2.3. Sending a CTF File using Anycomms

- Open your **DataExchange** folder in Phoenix. On the **View Menu** drop down to **View**, then **Details**. This will enable you to click on the heading **Modified** to sort your files by date. Click until the newest files are at the top of the list.
- Copy the correct CTF transfer file from your Data Exchange folder, to the **Outbox** on the desktop of the computer with your Anycomms software on it.



- Open **Anycomms** and start a call as normal, the transfer bar should go blue indicating the file is being transferred.
- The transfer.txt Notepad window should indicate that the file has been downloaded with the text "The following CTF file(s) have been uploaded to the LEA: 926xxxx\_CTF\_926xxxx\_004.XML" (where xxxx is the four digit DfEE no of the source and next school.)
- If the CTF file has been successfully transferred it should appear in the Archive folder on your desktop.
- E-mail the destination school and notify them that a transfer file has been despatched via AnyComms.

## 2.4. Receiving a CTF File using Anycomms

- Open **Anycomms** and start a call as normal.
- If a CTF file has been sent to you the following message should appear in the transfer.txt Notepad

“The following CTF file(s) have been downloaded from the LEA 926xxxx (where xxxx is the feeder schools DfEE no)\_CTF\_926xxxx (where xxxx is your schools DfEE no) \_004.XML”
- Copy and paste the file to your Phoenix **DataExchange** folder

## 2.5. Importing the CTF into Phoenix

- In Phoenix go to **System Management > Data Management > Data Exchange**.
- Select **Import Common Transfer XML**
- Click **Continue**
- ALL CTF files held in the Data Exchange folder will be listed. Tick **Import file, ONLY** against the file/s that are to be imported.
- Enter an **Admission date**.
- Allocate a **Year Group** for the imported pupil.

*If the admission date is current then your current year groups will be offered.  
If the admission date is a future date then a New Intake category will be offered for selection. The pupil will then be enrolled automatically when their admission date becomes current.*

- Click **Import Selected CTF** files now.
- Click **OK** to **Are you sure?**
- If errors are listed, Click **View Details** and note any error messages.
- Click **Close**, and then, **Continue**.
- Click **View Details**
- Click **Close**, and then **Import**.
- Close back to the **Main Menu** then go to **Pupil Records** and make a thorough check of the imported data.
- **Editing will be required.** (for example in home address, emergency contacts, medical, confidential and heritage information screens. A class will need to be assigned.)

## **FINALLY**

Once the CTF has been imported to Phoenix, or despatched to another school via AnyComms.

Open your Data Exchange folder in Phoenix and delete the CTF files no longer required.

**Please contact Education ICT Solutions should you require assistance.**

**Telephone:** 0845 303 3003

**e-mail:** [ictsolutions@norfolk.gov.uk](mailto:ictsolutions@norfolk.gov.uk)

**ICT solutions web-site** <http://ictsolutions.norfolk.gov.uk/>

**Phoenix Documents** <http://ictsolutions.norfolk.gov.uk/phoenix/phoenixmain.asp>