

## Phoenix Gold Transfer of Pupil Data to/from other LEA's (S2S)

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

The DfES national secure data transfer service (**S2S**) enables a Common Transfer File (CTF) of **pupil data** to be **transferred electronically to or from any maintained school in England**.

This helpsheet details how pupil datafiles can be **transferred out of/into Norfolk , to or from any maintained school in England** using the **DfES S2S** Secure File Transfer System.

### The S2S file transfer process.

#### First Time Processes

1. Check your version of Internet Explorer.
2. Check your school details.

#### Creating a CTF file and Uploading to the S2S website

3. Create the CTF file.
4. Logon to TeacherNet and Transfer the CTF file.

#### Downloading from the S2S website

5. Following notification by e-mail that a transfer file is available, logon to TeacherNet and download the CTF.
6. Import the file into your school's Management Information System. (Phoenix in most cases.)

#### Tidy Up processes

7. Viewing and removing files.

## 1. First Time processes.

**Before using S2S for the first time** please check the following on the computer which will be used for uploading or downloading your data.

### 1.1 Internet Explorer

Version 5.5 or higher, with 128 bit encryption must be used.

- Start **Internet Explorer** and click on the **Help** menu on the top menu bar.
- Drag down to '**About Internet Explorer**' to display the version number.
- Check the version number and Cipher strength, which should be 128 bit.

Please contact ICT Solutions help desk on 0845 303 3003 for assistance should you need to upgrade your copy of Internet Explorer.

## 2. Checking your school details held on the S2S website

- **Start Internet Explorer** (if you have not already done so).
- **Enter <https://securedatatransfer.teachernet.gov.uk/sdtlive/asp/login.asp>** in the address line.  
This will take you to the home screen of the secure transfer site. <sup>1</sup>
- **Enter your Username and password.**  
If you do not know your Username and password, contact the Management Information Centre (MIC) on 01603 222352.  
Should you wish to change your password, the MIC can do this for you.
- The homepage for the DfES Secure Data Transfer site will be loaded.
- **Click School Details**  
Check all details, in particular the school e-mail address.  
Please e-mail [helpdesk@edubase.gov.uk](mailto:helpdesk@edubase.gov.uk) or ring 0870 1202527 should any data be incorrect.
- **Click Logoff** if you do not wish to transfer any data at this stage.

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<sup>1</sup>(Tip) Right click on this screen and take the option to **Add to Favourites**. Next time you want to enter this site start Internet Explorer, go to favourites and click on the favourite you previously set up. This will save you having to type the S2S securedata web site address in each time.

### 3. Creating a CTF file in Phoenix and Uploading to the S2S website

The common transfer file should be sent to the new school no later than 15 days after the pupil has moved, but it is better to send the file as soon as the transfer has been confirmed.<sup>2</sup> Before creating a transfer file for a pupil who is leaving, a **Destination School** for this pupil must exist in **Associated Schools**. The DfES and LEA codes for the destination school must be correct.

#### 3.1 To create a new record in Associated Schools:

- In Phoenix, from the **Main Menu**, go to **Associated schools > Records**.
- Click  to create a new record.
- Click on the Pen Dropper 
- Open the folder corresponding to the LEA of the new school.
- Double click on the school name.
- Create a school code (the initial letters of the school name for example) and deselect the tick in the feeder school box.
- Click **OK** to save the new record.

#### 3.2 To create a CTF file for an individual pupil:

- 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 of the filename. 

#### 3.2 To create a CTF file for more than one pupil going to the same school:

- In Phoenix, go to **System Management > Data Management > Data Transfer**.
- 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 **Export pupils in Common Transfer XML**.
- Click **Continue**
- Select the pupil/s who are leaving. (Ctrl Click to select more than one pupil)
- Click **Continue**
- If any error/s are created click **View Details**. Cancel the transfer process, correct the error/s and start the transfer again.
- Click **Continue**
- Click **OK** to **Export complete**. Note the format of the filename. 

<sup>2</sup> Full instructions for creating and importing Phoenix pupil data by CTF can be downloaded from the website. <http://www.teachernet.gov.uk/docbank/index.cfm?id=1572>

The 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.

If you do not know where the pupil has moved to, a transfer file will be created using XXXXXXXX as the destination. Upload it onto the secure site — this information will be held in a *Lost Pupil database* which can be searched by an LEA. **This file should only hold information on one pupil.**

If a child leaves your school to go to an independent school or a school outside England then please edit the CTF file name with MMMMMMMM for the destination — this file will be held in a database which can be searched by an LEA.

#### 4. Logon to TeacherNet and Upload your CTF file.

- Start Internet Explorer
- Enter <http://www.teachernet.gov.uk> in the address line. This will take you to the main Teachernet menu.
- Select **S2S** (look to the right of the screen)
- In paragraph 2 click on [Secure Data Transfer System](#).
- Enter your Username and password.

*If you do not know your Username and password contact the Management Information Centre (MIC) on 01603 222352.*

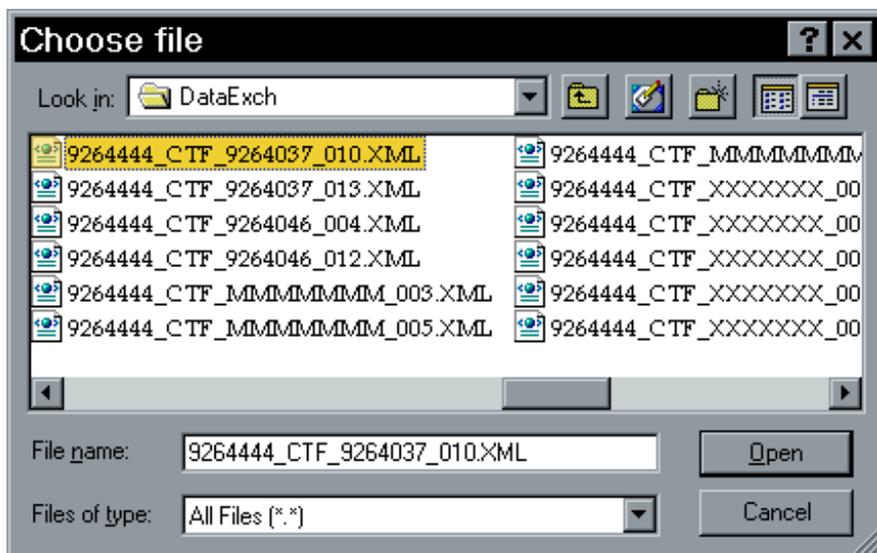
*Should you wish to change your password, the MIC can do this for you.*

- In the logon screen click the + sign alongside **Upload**.
- Click on **Upload CTF File**
- Click **BROWSE** to browse to the CTF file that you created earlier.
- Locate and **Open** the correct file

*The CTF file you created in section 3 will be saved in the Data Exchange folder in Phoenix. This is the same folder that files go to when you use Anycomms to send data to County.*

**The path to the Data Exchange folder is usually**

**D:\Phoenix\DataExch** but will be different if Phoenix is on a server



- Click **Upload**

A message similar to the following will be displayed.

*The file 9264444\_CTF\_1234444\_001.XML has been transferred to the web site. The file will shortly be uploaded to the database. If any errors are identified at this point you will be notified by email.*

*Please use the **Back button** to return to the Upload Page.*

- **Logoff**

## 5. Downloading a CTF file from the S2S website

Receiving schools will get an e-mail informing them that a CTF file is available for downloading. This will give details of the sending school.

If a pupil arrives in your school and you do not know the previous school, or if a pupil comes to your school from an independent school or from a school outside England who had previously been in an English maintained school, then contact the LEA who will be able to search the Lost Pupils database for a matching CTF file using gender, names or former names and date of birth.

### 5.1 Logon to S2S and Download a CTF.

- Start Internet Explorer
- Enter <http://www.teachernet.gov.uk> in the address line. This will take you to the main Teachernet menu.
- Select **S2S** (look to the right of the screen)
- In paragraph 2 click on [Secure Data Transfer System](#).
- Enter your Username and password.

*If you do not know your Username and password contact the Management Information Centre (MIC) on 01603 222352.*

*Should you wish to change your password, the MIC can do this for you.*

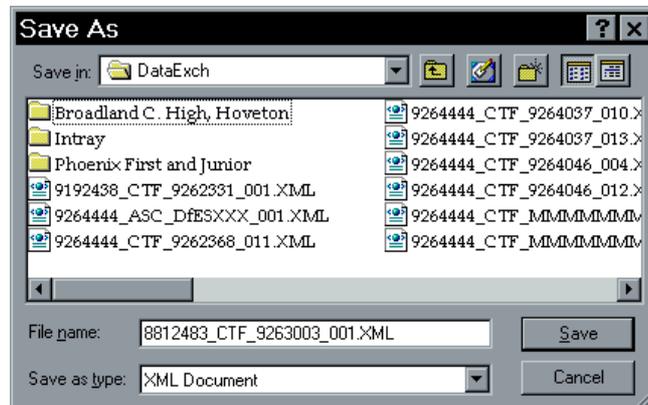
- Click on **Download**  
Files awaiting download will be displayed.
- Click on the filename to display details of the pupil being transferred.
- If the pupil information is incorrect (for example the pupil has been sent to the wrong school) click the **Reject** button. An e-mail will be sent to the originating school.
- If you wish to download the file click **Accept**.
- Confirm the file download. Click **Yes**.
- Click **Save**.

- Specify the location where the file is to be saved. This must be the Data Exchange folder in your Phoenix folder.

**The path to the Data Exchange folder is usually**

**D:\Phoenix\DataExch but will be different if Phoenix is on a server**

- Click **Yes** if the download was successful
- Logoff



## 6. 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**, then **Continue**.
- Click **View Details**
- Click **Close**, 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, parent titles, emergency contacts and medical, confidential and heritage information screens.)

## 7. Tidy Up processes

### Viewing and Removing Files

- **Logon** to the Secure Data website.

Enter <https://securedatatransfer.teachernet.gov.uk/sdtlive/asp/login.asp> in the address line.

This will take you to the home screen of the secure transfer site. <sup>3</sup>

- Enter your **Username** and **Password**
- Click **Download**
- Click **Reject** for any files you do not wish to download.

**(If you have already entered data manually for the new pupil DO NOT download the CTF as this will overwrite your existing pupil record)**

- **View/Remove files.** Information on this facility will be provided when available.

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

**Telephone:** 0845 303 3003  
**e-mail:** [ictsolutions@norfolk.gov.uk](mailto:ictsolutions@norfolk.gov.uk)  
**web address:** <http://ictsolutions.norfolk.gov.uk/>

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