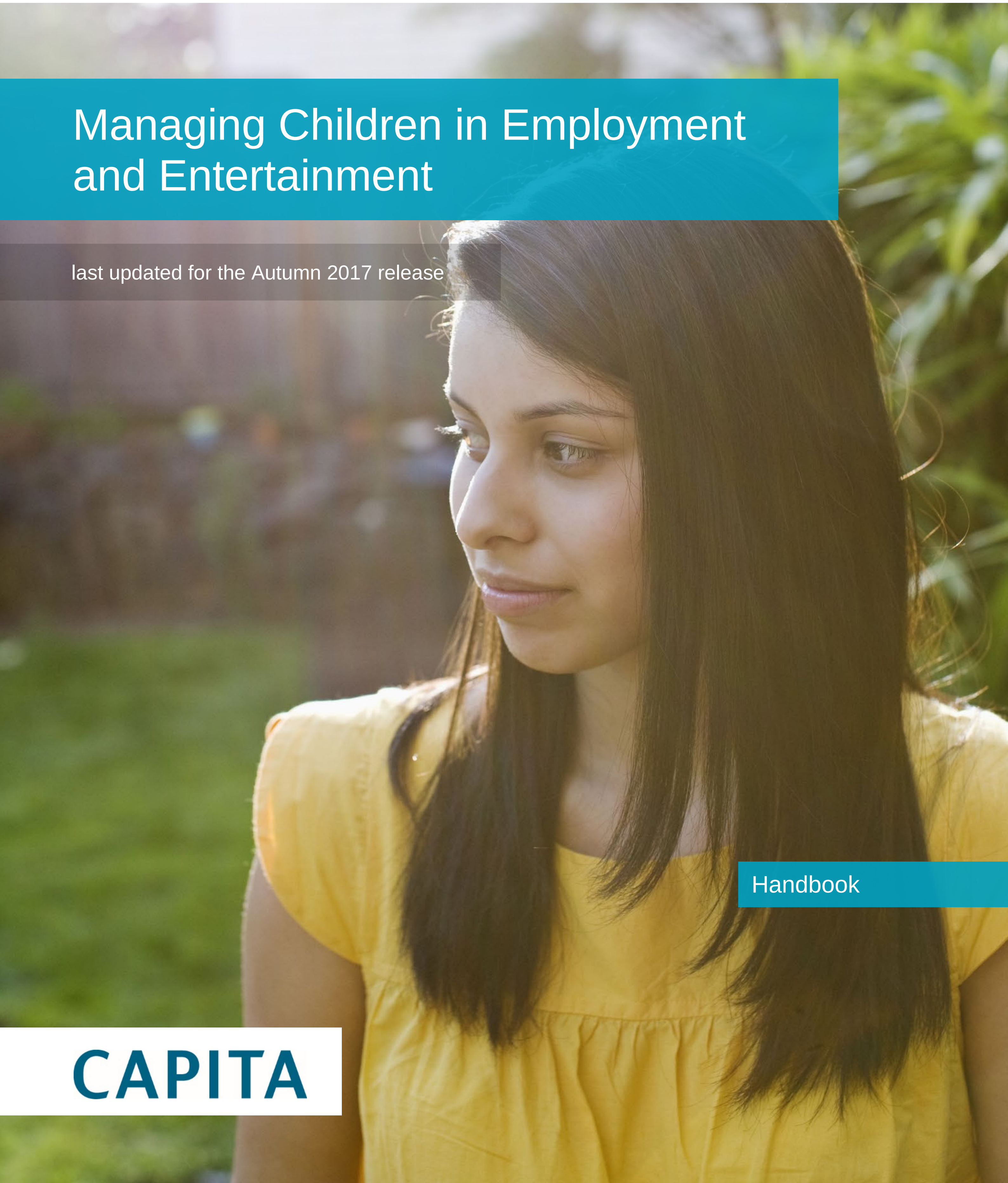
Managing Children in Employment and Entertainment

last updated for the Autumn 2017 release



Handbook

CAPITA

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www.capita-one.co.uk

Contacting One Application Support

You can log a call with One Application Support via the Customer Service tool available on My Account.

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

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Please ensure that you include the document name, version and aspect of documentation on which you are commenting.

Contents

01 | Introduction to Children in Employment and Entertainment 1
Overview of Children in Employment and Entertainment 1
Using this Handbook 1
What's new in this release? 1
Permissions.....................2
02 | Configuring Children in Employment.....................3
Introduction 3
Understanding the Employment Defaults Options.....................3
Employment Defaults.....................3
Work Permit Conditions 4
Work Permit Reports.....................4
Work Permit Reprint Reason 4
Working Hours 4
Editing Employment Defaults Options 5
Adding a Work Permit Report.....................6
Removing a Work Permit Report.....................6
Adding Predefined Text for Terms and Conditions Details.....................6
Editing Predefined Text for Terms and Conditions Details.....................7
Deleting Predefined Text for Terms and Conditions Details.....................8
03 | Creating Employment Applications and Work Permits 9
Introduction 9
Understanding Employment Application Status Codes 9
Creating a New Employment Application 10
Adding Working Hours 13
Adding Working Hours for Specific Days and Times..................... 14
Adding Working Hours as Daily Hours, Total Hours Per Week or Total Hours Per Month 15
Revising Working Hours 16
Editing Terms and Conditions..................... 17
Editing Authorisation Details..................... 18
Viewing School Attendance Details 19
Viewing School Attendance via Student Details..................... 19
Viewing School Attendance via the Student Employees List 20
Editing an Employment Application Status 21
Generating and Printing a Work Permit..................... 21
Deactivating an Employment Application 23
04 | Administering Entertainment Options.....................26
Introduction 26
Understanding Entertainment Defaults..................... 26

Licence Condition Defaults 26
Report Defaults 26
Editing Entertainment Defaults 27
Managing Performance Groups 27
Creating a New Performance Group 27
Editing a Performance Group 29
Deleting a Performance Group 29
Removing a Student from a Performance Group 30
Managing Venues 30
Adding a New Venue That is Not a Base 30
Adding a Venue from a Base 32
Editing a Venue 33
Deleting a Venue 33
05 | Creating Entertainment Applications and Licences 34
Introduction 34
Understanding Entertainment Application Status Codes 34
Types of Entertainment Applications 34
Creating a New Entertainment Application 35
Adding a Performance and Rehearsal Schedule 39
Deleting a Performance Schedule 41
Associating a Chaperone to an Application 42
Removing a Chaperone from an Application 43
Editing Licence Conditions 43
Editing an Entertainment Application Status 45
Generating and Printing a Performance Licence 45
Generating and Printing a Performance Licence for an Individual Student 45
Generating and Printing a Performance Licence for Multiple Students 45
Batch Processing 46
Updating Multiple Applications via Batch Processing 46
06 | Maintaining Chaperones 49
Introduction 49
Registering a New Chaperone 49
Adding Additional Chaperone Details 52
Opening an Existing Chaperone Record 53
Recording Check Details 54
Editing Check Details 55
Deleting Check Details 55
Recording Interview Details 55
Editing Interview Details 56
Deleting an Interview Record 56
Recording Referee Details 57
Editing Referee Details 58

Deleting a Referee 58
Creating a Chaperone Licence 59
Generating and Printing a Chaperone Licence 59
Editing a Chaperone Licence 60
Deleting a Chaperone Licence 60
Chaperone Active Status 61
Making a Chaperone Inactive 61
Making a Chaperone Active 61
Deleting a Chaperone 62
Viewing Entertainment Details 62
07 | Maintaining Employer Details 63
Introduction 63
Creating a New Employer 63
Creating a New Employer via the Employer Area 63
Creating a New Employer via the Add New Employer Hyperlink 65
Creating a New Employer via the Add new Employer from Bases Hyperlink 66
Viewing Employer Details 67
Editing Employer Details 69
Deactivating an Employer 69
Deleting an Employer 71
Viewing Contact Person Details 73
Adding a Person as an Employer Contact 74
Adding an Employment Inspection Report 75
Adding an Entertainment Inspection Report 76
Viewing an Inspection Report 78
Editing an Inspection Report 78
Deleting an Inspection Report 78
Viewing the Student Employees List 79
Viewing the Student Performer List 79
Viewing the Performances List 80
Adding a Performance 80
Editing a Performance 82
Deleting a Performance 83
Adding a Performing Group 83
Setting Performance and Rehearsal Details for a Performing Group 85
Editing a Performing Group 89
Deleting a Performing Group 89
08 | Managing Reports 91
Overview 91
09 | Common Functionality 92
Introduction 92
Creating a New Student to Add to an Application 92

Adding a Photo to a CIEE Application 92
Opening an Application 93
Editing Basic Details 95
Generating Licences in Bulk 96
Deleting an Application 97
One v4 Online Common Functionality 97
Index 98

01 | Introduction to Children in Employment and Entertainment

Overview of Children in Employment and Entertainment

Children in Employment and Entertainment (CIEE) is part of the Applications module within One v4 Online. There are two separately licensed modules, Children in Employment and Children in Entertainment. Although there is some shared functionality, each area also has specially tailored tools.

The Children in Employment area is used to maintain child employment applications, employer details and generate work permits when an application is approved. The module can also maintain the working hours and licence conditions for each application.

The Children in Entertainment module is used to maintain applications and issue licences for children involved in entertainment. This area is also used to maintain chaperone applications, including the recording of all the registration processes and generating chaperone licences. The Children in Entertainment area also maintains the details of each employer, including details of performances, associated child performers and their performing schedule.

Using this Handbook

To make the information in this handbook easier to find, topics are generally grouped into module specific chapters. These chapters are grouped together with other chapters related to the specific area.

The first chapters of this handbook cover the configuration and usage of the Children in Employment module and the second part covers the configuration and usage of the Children in Entertainment area.

What's new in this release?

To help you identify changes made to this document, content that has been updated for the most recent release is highlighted in yellow.

- The **Module Defaults** tab has been renamed to **Employment Defaults**.
- When creating an entertainment application, a warning message is now displayed if you attempt to add a performer older than the school leaving age. You can still add them to the application if you want.
- When searching for an application, a message is now displayed if there are no matches found.

Permissions

CIEE uses business processes to determine the user groups that have access to specific CIEE functionality. User groups are assigned Read, Read-Write, Read-Write-Delete or Deny permissions to each CIEE business processes. Permissions are maintained in the One v4 Client. One System Administrators should create user groups with the desired level of access to the following business processes and main business processes:

<table>
<tr><th>Main Business Process</th><th>Business Process</th><th>Read</th><th>Read-Write</th><th>Read-Write-Delete</th><th>Deny</th></tr>
<tr><td>CIEE</td><td></td><td></td><td></td><td>✓</td><td></td></tr>
<tr><td></td><td>Children in Employment</td><td></td><td></td><td>✓</td><td></td></tr>
<tr><td></td><td>Children in Entertainment</td><td></td><td></td><td>✓</td><td></td></tr>
<tr><td></td><td>CIEE - Common</td><td></td><td></td><td>✓</td><td></td></tr>
<tr><td></td><td>Employment Routine</td><td></td><td>✓</td><td></td><td></td></tr>
<tr><td></td><td>Entertainment associated Chaperone</td><td></td><td></td><td>✓</td><td></td></tr>
<tr><td>Bases</td><td rowspan="3" colspan="5">Permissions for these main business processes can be set to whatever the required level is for the selected user group, however they <u>cannot</u> be set to Deny.</td></tr>
<tr><td>Student Data</td></tr>
<tr><td>Person Administration</td></tr>
</table>

More Information:
RG_Permissions reference guide available from the One Publications website (www.onepublications.com).

02 | Configuring Children in Employment

Introduction

One Administrators can configure Children in Employment via the **Administration** area.

There are two employment related configuration tabs, **Employment Defaults** and **Terms and Conditions Defaults**.

For organisations that have migrated an existing version of the CIEE software from the One v3 Client to One v4 Online, your administration settings are maintained. However, you can edit these settings in the One v4 Online if required.

For organisations setting up CIEE for the first time, complete these procedures to configure your system as required.

Understanding the Employment Defaults Options

The **Employment Defaults** tab is accessed via **Applications | Administration | CIEE** and is used to configure the following key areas of the employment related CIEE software:

- Employment Defaults
- Work Permit Conditions
- Work Permit Reports
- Work Permit Reprint Reason
- Working Hours.

Employment Defaults

Employment Defaults are used to prepopulate selected fields when a user is recording employment applications and work permits. The following table provides the default value for each employment default item, what it controls and where it used in the software.

Name	Description/Location
LA Code	The prefix that is used to generate the **Employment Card Number** displayed on an employment application when a work permit is generated. This is alpha-numeric (upper case only) and must contain 4 characters.
Default Terms	The text entered here is added automatically to the **Term and Conditions** text box in the **Terms and Conditions** tab when an employment application is created. The text can be edited in the application directly, if required.
Default Visitor	This is the default person in the **Visitor** field when adding an employment inspection report via the **Employer Details | Inspection** tab.

Name	Description/Location
Default end date to	This is the default value for the employment **End Date** used when creating a new employment application. When a **Start Date** is entered and the user tabs out of the field, the **End Date** is calculated automatically using the selected default method. **Maximum School Leaving date** - This will use the **Start Date** of the employment record together with the child's date of birth to calculate the last day of the child's compulsory school education. This date will be the last Friday in June of the year that they turn 16. **One Year from Start Date** - This will use the **Start Date** of the employment record and calculate the end date as one year on from the **Start Date**, i.e. a start date of 09/11/2001 will calculate an end date of 09/11/2002. **Blank** - There is no generated automatically default **End Date** provided.

Work Permit Conditions

When any of these options is selected, the LA must obtain and record permission for each of the selected entities. If permission is not recorded in the **Authorisation** section of the **Terms and Conditions** tab, you cannot generate a work permit. The available permit conditions are:

- Parent/Carer Authorisation
- EWO
- LA Approval
- Employer
- Head Teacher Approval

Work Permit Reports

Before any work permits can be created in One v4 Online, a work permit report must be selected. The work permit report is a Crystal Report that CIEE uses to format the information contained in an employment application and to create the printable version of the work permit. Click the browse button to select the Crystal Report you wish to use when generating the work permit and also the default number of copies.

Work Permit Reprint Reason

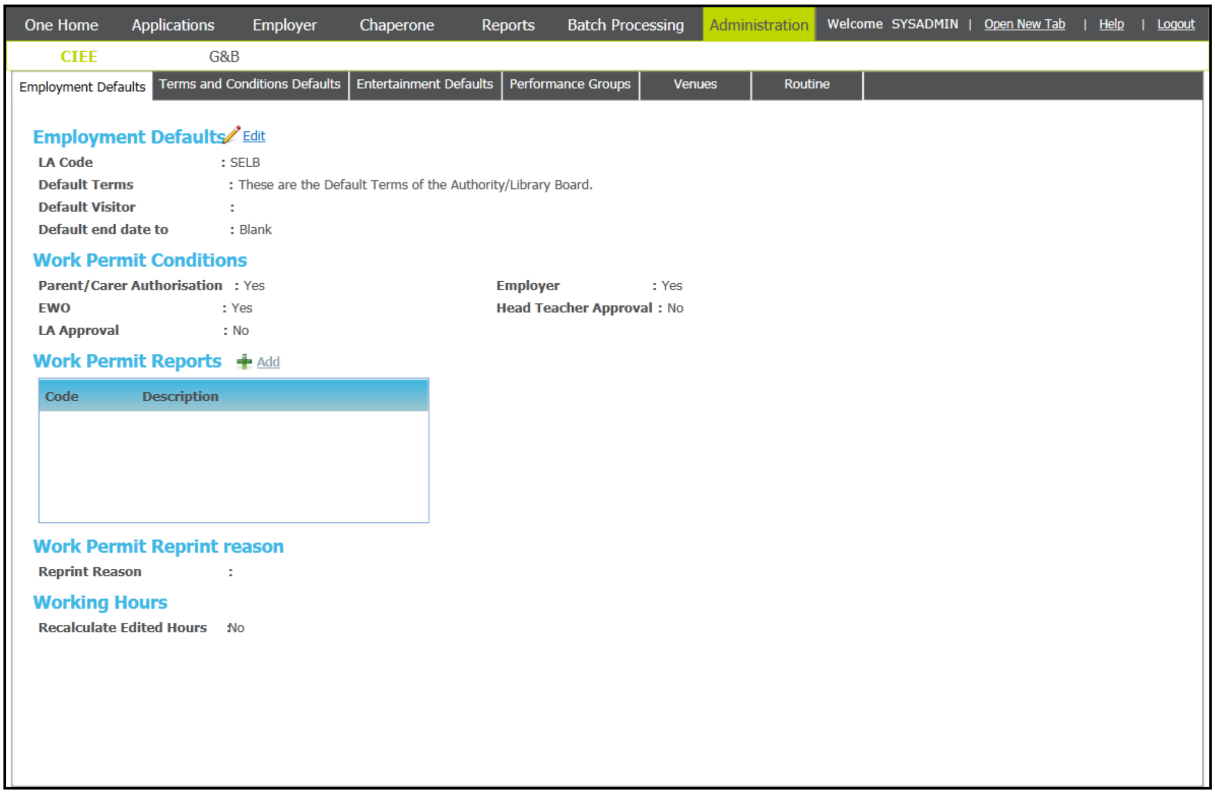
Select the default **Reprint Reason** that is displayed when a user attempts to reprint a work permit.

Working Hours

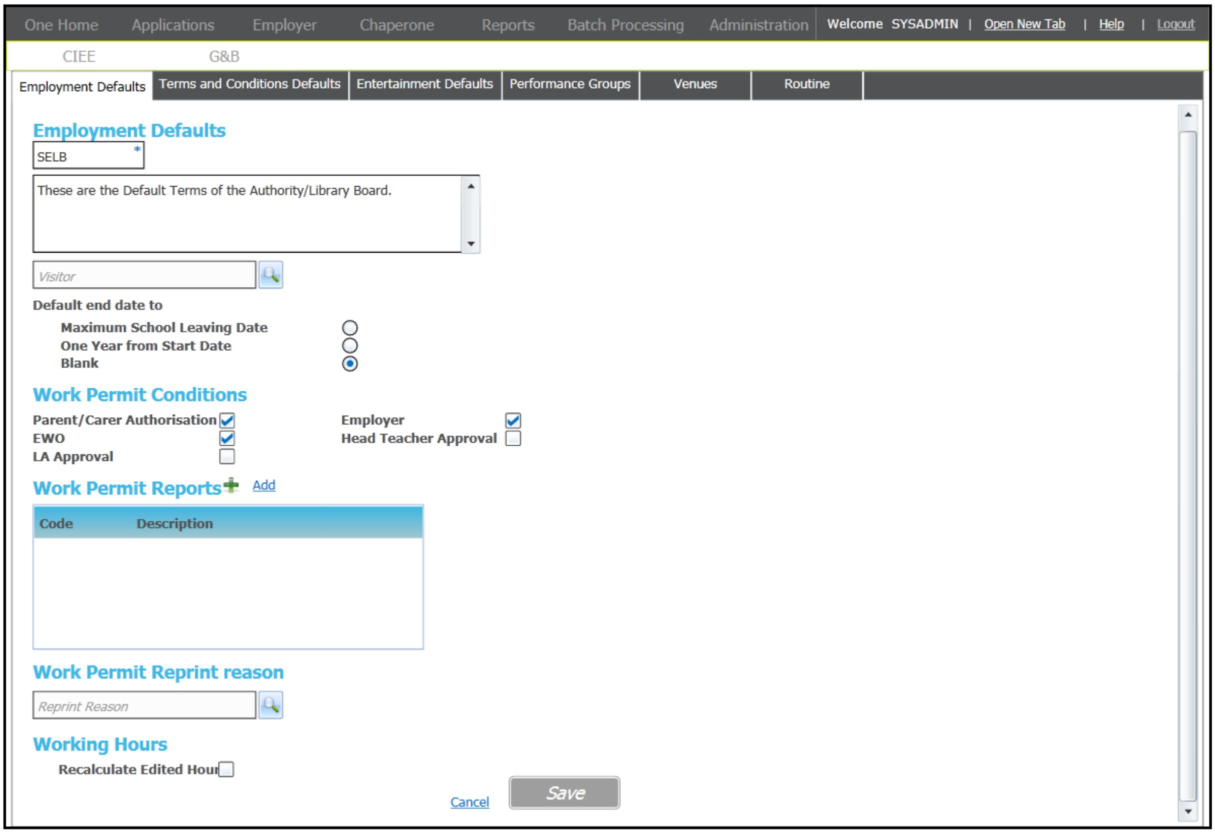
The **Recalculate Edited Hours** check box determines if One calculates automatically the total hours of work when adding working hours in the **Working Hours** tab of an employment application. If selected, One calculates automatically the **Total Term Time** and **Total Holiday Time** values when recording working hours via the **Days of the week** method. If not selected, the user must update the total values manually.

Editing Employment Defaults Options

1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Ensure the **Employment Defaults** tab is open.



3. Click the **Edit** hyperlink to enable editing.



4. Make any required changes. For more information on each value, see Understanding the Employment Defaults Options on page *3*.
5. After making the required changes, click the **Save** button to record the updates.

Adding a Work Permit Report

To add a work permit report, complete the following procedure:

1. Open the **Employment Defaults** tab and enable editing. For more information, see Editing Employment Defaults Options on page *5*.
2. Click the **Add** button adjacent to the **Work Permit Reports** section to display the **Select Workpermit Reports** dialog.
3. If necessary, enter text in the text box to filter the report list.
4. Select the check box adjacent to the reports to wish to add.
5. Click the **Select** button to add the reports.

Removing a Work Permit Report

To add a work permit report, complete the following procedure:

1. Open the **Employment Defaults** tab and enable editing. For more information, see Editing Employment Defaults Options on page *5*.
2. Click the **Remove** button adjacent to the work permit report you wish to display the **Remove Work Permit** dialog.
3. Click the **Yes** button to remove the report.

Adding Predefined Text for Terms and Conditions Details

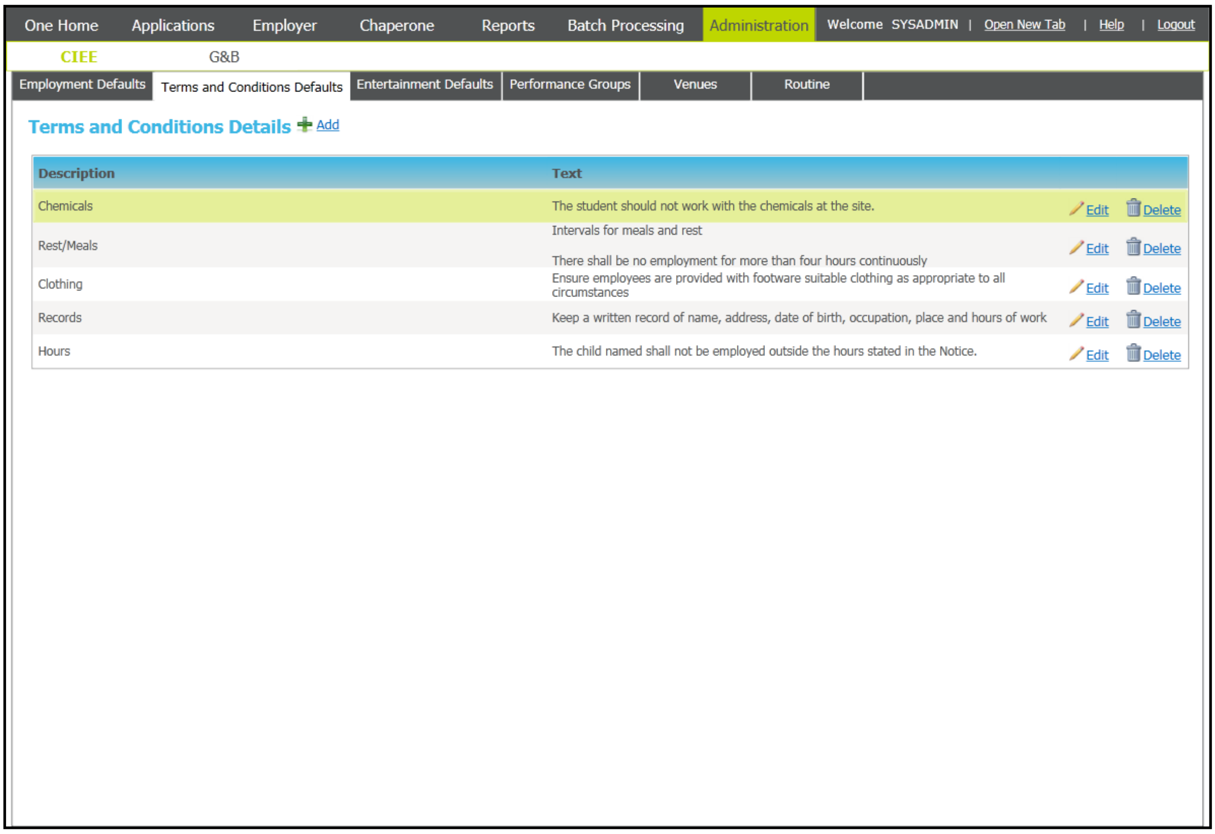
You can add text to employment applications to indicate any special terms or conditions that apply to the student's employment. These additional terms and conditions are included in the work permit.

To help users save time, you can add commonly used text in the **Terms and Conditions Defaults** tab. Items added here are available for users to quickly add in the text editor, accessed in the **Terms and Conditions** tab of an employment application.

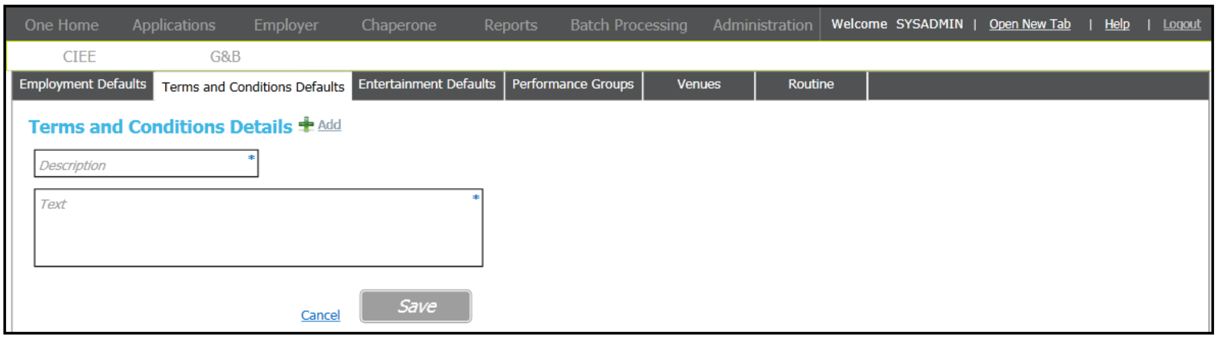
When creating a new piece of text, you must enter a **Description** and **Text**. Users see the **Description** when they click the **Append Text** drop-down list in the **Terms and Conditions** text editor. When the user clicks the **Append** hyperlink, the predefined text is added to the text editor.

To create additional predefined text, complete the following procedure:

1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Terms and Conditions Defaults** tab.



3. Click the **Add** hyperlink to display blank **Description** and **Text** fields.



4. Enter a **Description**.
5. Enter the **Text**.
6. Click the **Save** button to add the item to the **Terms and Conditions Details** list.

Editing Predefined Text for Terms and Conditions Details

1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Terms and Conditions Defaults** tab.
3. For the entry you wish to update, click the **Edit** hyperlink to enable editing.
4. Make the required updates.
5. Click the **Save** button to record the changes.

Deleting Predefined Text for Terms and Conditions Details

1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Terms and Conditions Defaults** tab.
3. For the entry you wish to delete, click the **Delete** hyperlink to display the **Terms and Conditions Defaults** confirmation dialog.
4. Click the **Yes** button to delete the text.

03 | Creating Employment Applications and Work Permits

Introduction

After configuring the Child in Employment area, you can create applications and issue work permits. In order to create a work permit that can be printed and distributed to the relevant parties, you must complete the following six steps.

1. Create a basic employment application.
2. Add working hours.
3. If required, add terms and conditions.
4. If required, record any authorisation details.
5. Generate and print the work permit.

Although the intermediary steps can be completed in any order, the first step must always be to create an employment application and the final step must always be to issue and print the work permit.

Understanding Employment Application Status Codes

An employment application requires an **Application Status**. By default, there are nine status codes, although a One administrator can alter these in the One v4 Client. Most of the codes are for your reference only and do not affect the application directly. However, only applications with a status of **APP** or **REV** can be used to generate a work permit.

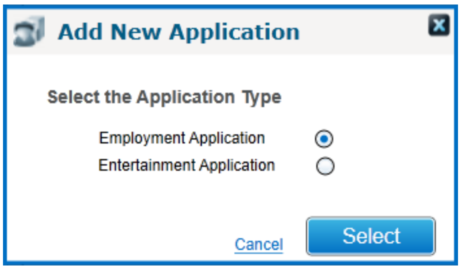
Code	Description
APP	Approved - The default status for all applications.
AI	Awaiting Information.
DRFT	Applications can be saved as drafts without completing all fields and can then be searched for and completed at a later date. When all the mandatory information is available a draft application can be assigned another status e.g. Approved
ISS	Issued - The application has been approved and the LA has generated the work permit. This status cannot be selected manually; it is set automatically when the licence is generated.
QUE	Query.
REF	Referred.
REJ	Rejected.
REV	Revised – The application has been updated and needs to be reissued.

Code	Description
WIT	Withdrawn.
OL	Working in another LA.

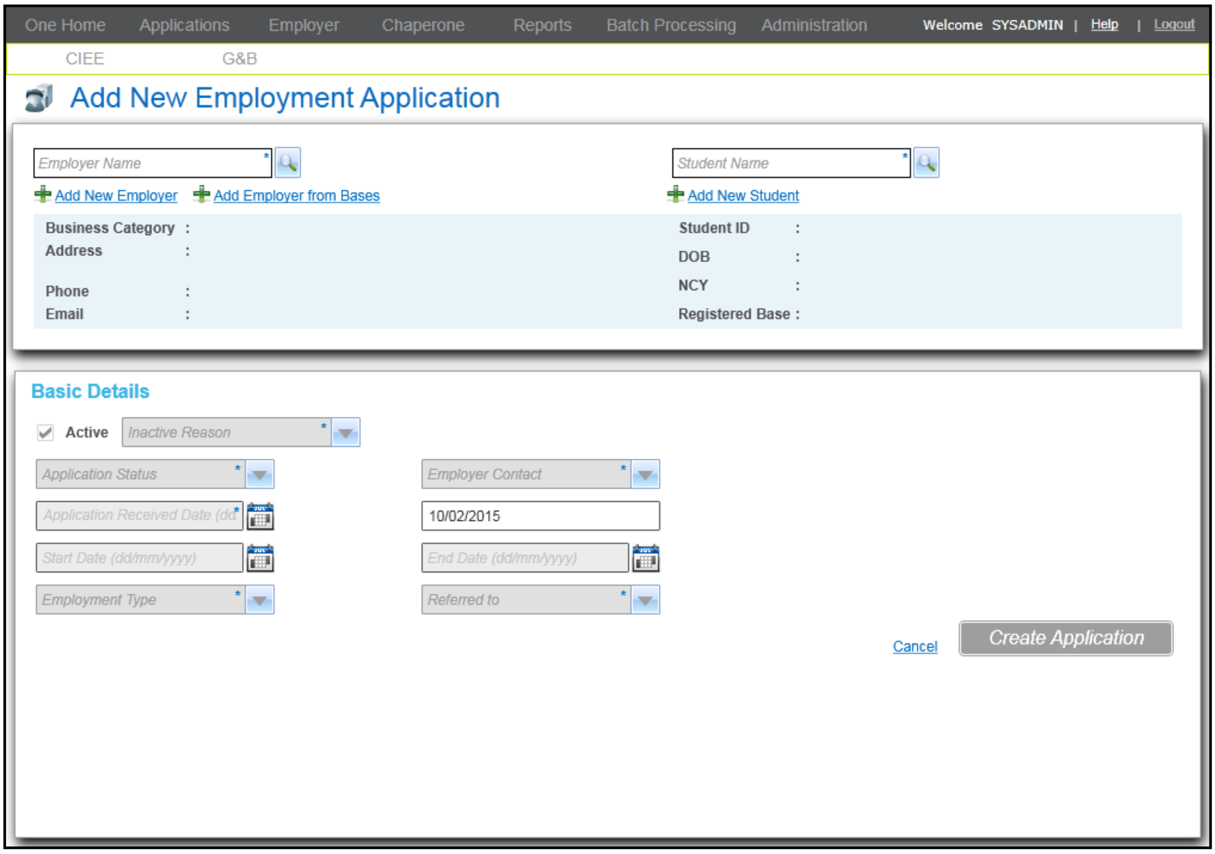
Creating a New Employment Application

The first step in issuing a work permit is to create an application that links a student to an employer. Each application can have only one student associated with it. After creating the basic application, you must add working hours and authorisations (if any are required) before generating and printing the work permit.

1. From the One homepage, click the **Applications** button to display the **Applications** area.
2. Click the **Add New Application** hyperlink to display the **Add New Application** dialog.



3. Select the **Employment Application** radio button then click the **Select** button to display the **Add New Employment Application** page.

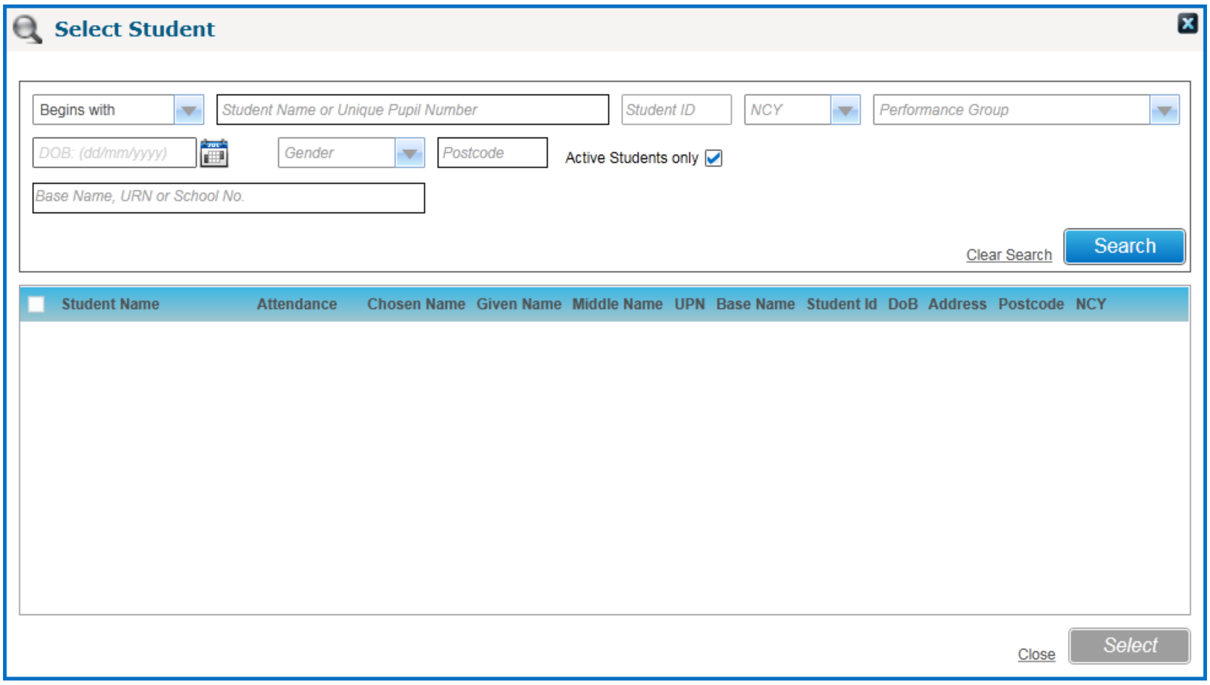


4. Click the **Employer Name** browse button to display the **Select an Employer** browser and choose the required employer.

Alternatively, you can **Add New Employer** or **Add Employer from Bases**. For more information, see Creating a New Employer on page *63*.

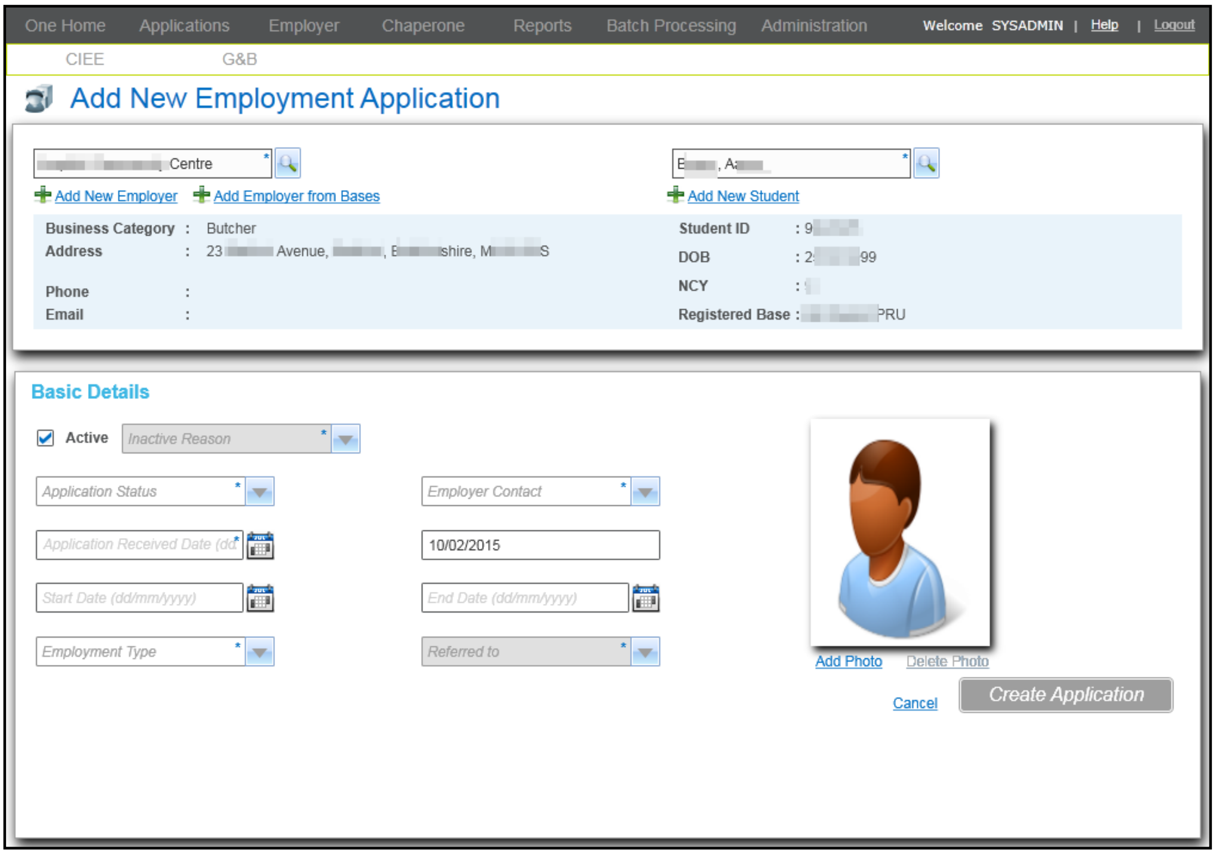
5. To add an existing student, click the **Student Name** browse button to display the **Select Student** dialog.

   If you need to search for students with different search criteria, enter the new search criteria then click the **Freeze & Search** button. The students you have already selected remain selected and the students that meet your new search criteria are displayed below a red line.

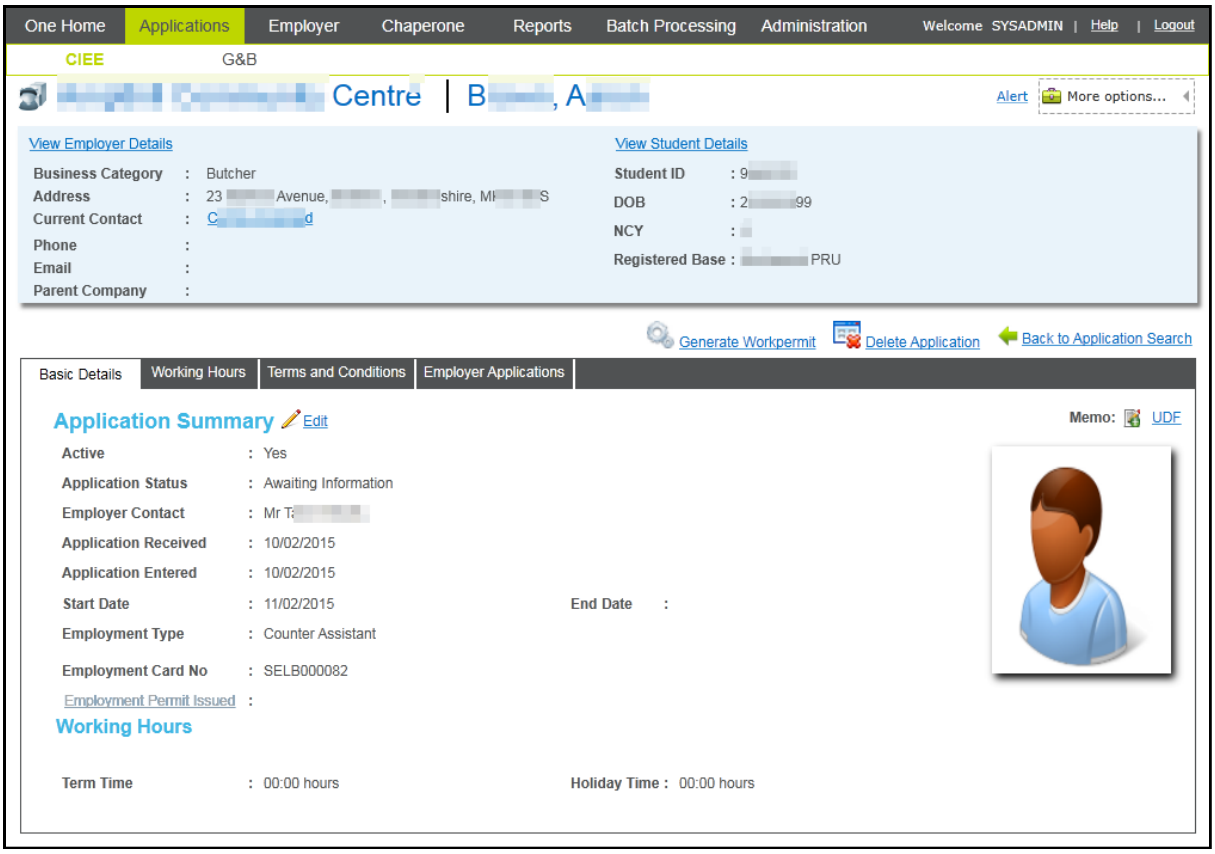


   Alternatively, you can **Add New Student**. For more information, see Creating a New Student to Add to an Application on page *92*.

6. Search for and select the required students then click the **Select** button to add the students to the application.



7. Select an **Application Status**, **Application Received Date**, **Employment Type** and **Employer Contact**. These are mandatory.
8. If known, enter a **Start Date** and **End Date** for the application.
9. Click the **Create Application** button to create the basic application and display its details. If you created applications for multiple students, the application for the first student selected is displayed.



After the basic application is created, you must add working hours and record any authorisation requirements before generating the work permit.

TIPS: *If you created multiple applications, click the* ***Back to Application Search*** *hyperlink,to display a list of other applications that you created at the same time.*

To view all the other applications for the employer associated with the currently open application, select the ***Employer Applications*** *tab.*

More Information:

Adding Working Hours on page *13*
Editing Terms and Conditions *on page 17*
Editing Authorisation Details *on page 18*
Generating and Printing a Work Permit on page *21*
Adding a Photo to a CIEE Application on page *92*

Adding Working Hours

Working hours can be entered using one of the following methods:

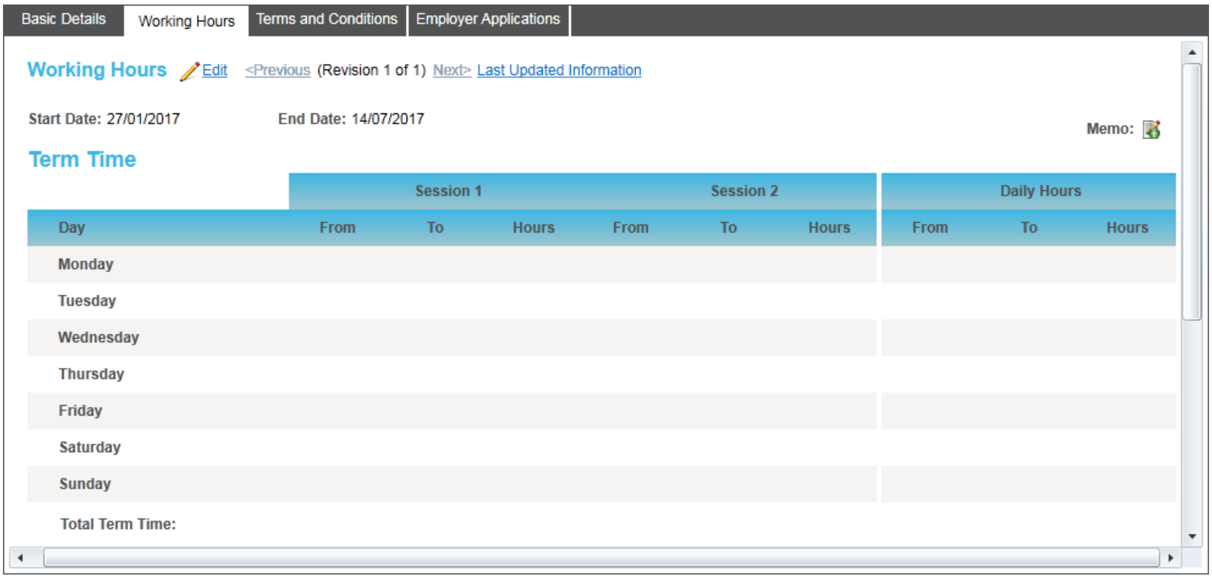
- by day of the week
- daily hours
- total hours per week
- total hours per month.

You can add different hours for term time and holiday time.

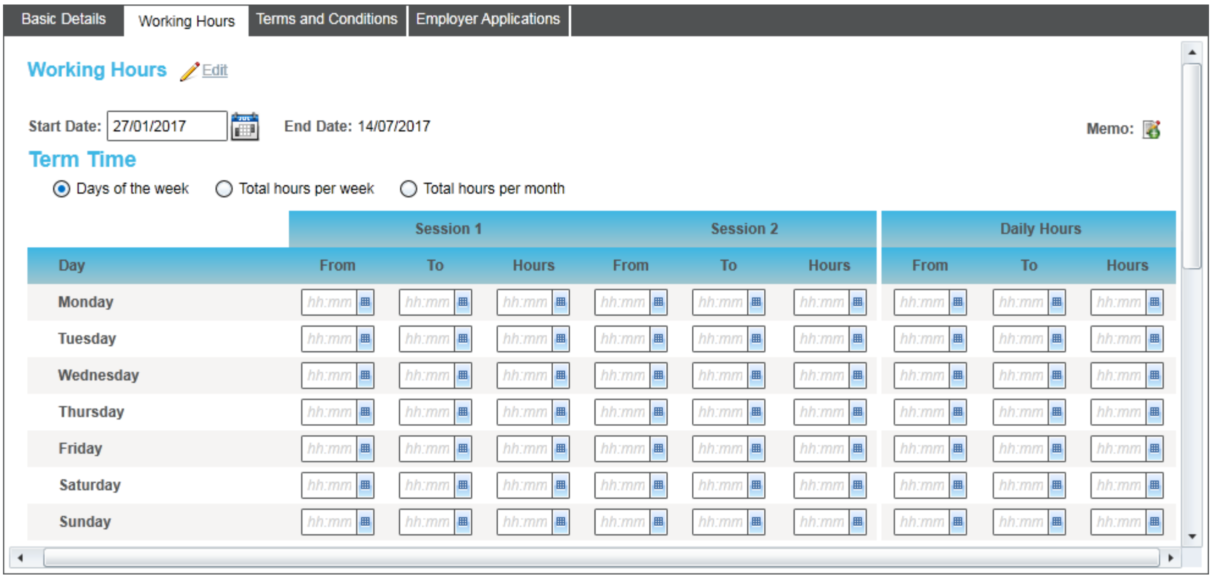
Adding Working Hours for Specific Days and Times

You can enter hours for specific times on specific days of the week. Hours can be assigned as session 1/session 2 hours or as daily hours, but only one method can be used per day.

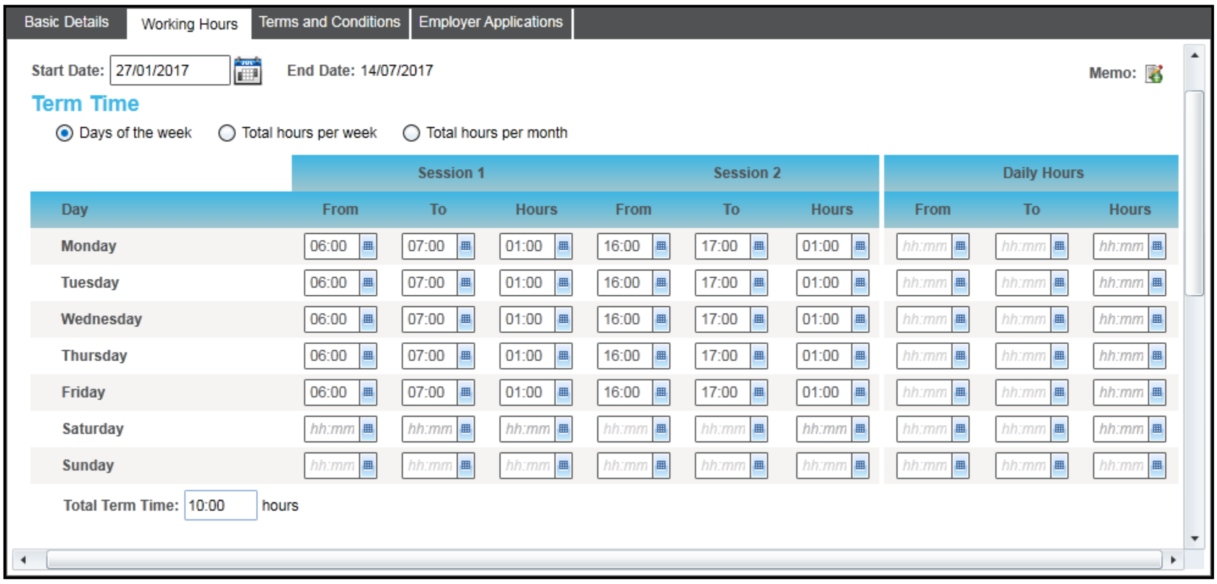
1. Open the required application. For more information, see [Opening an Application](#) on page *93*.
2. Select the **Working Hours** tab to display the **Working Hours** grid.



3. Click the **Edit** hyperlink to enable editing.



4. Select the **Start Date** for the working hours pattern.
5. To enter working hours for specific days, enter the required hours in the appropriate **From** and **To** fields.
6. If the student is working the same hours every weekday, you can enter the hours in the **Monday** row then click the **Copy Hours** hyperlink to add the hours to **Tuesday** through **Friday**.



***NOTE:** If enabled by the system administrator, when entering working hours as **Days of the week**, the **Hours**, **Total Term Time** and **Total Holiday Time** hours are calculated automatically and cannot be changed. However, if this functionality is disabled by your One administrator, you will have to enter the values manually. For more information, see Working Hours on page* 4.

7. If required, enter the **Holiday Time** working hours.

   If the student will work the same hours in holiday time, click the **Copy to Holiday Time** hyperlink to populate the holiday working hours.

8. Click the **Save** button to record the working hours.

Adding Working Hours as Daily Hours, Total Hours Per Week or Total Hours Per Month

In addition to recording working hours for specific days and times, you can also record them for generic time periods, including the total working hours for a day, week or month.

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Click the **Working Hours** tab to display the **Working Hours** grid.

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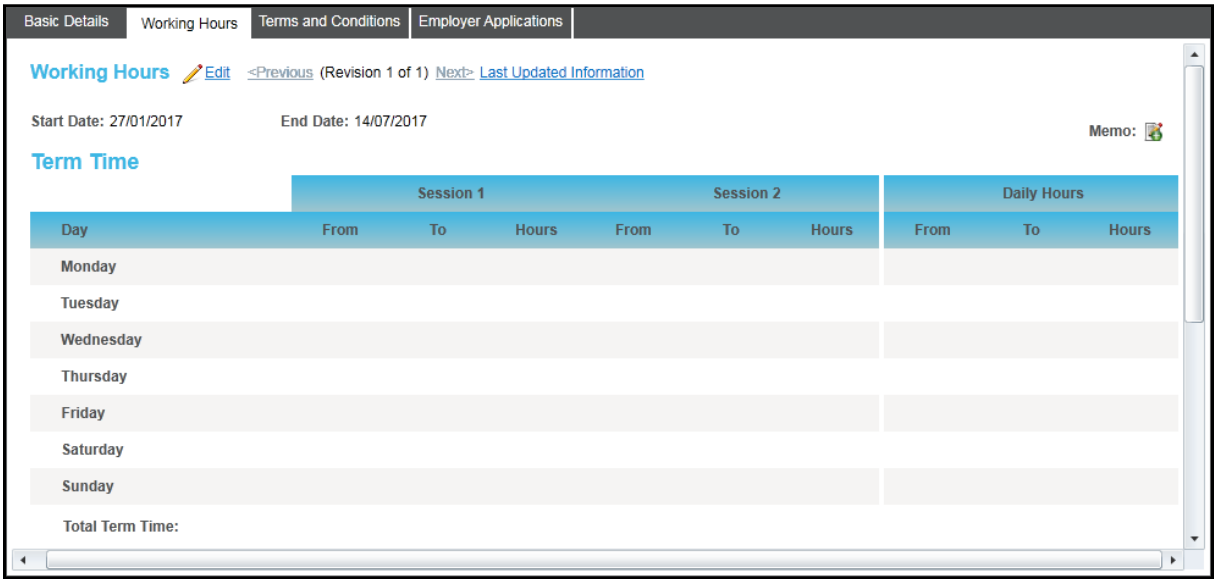
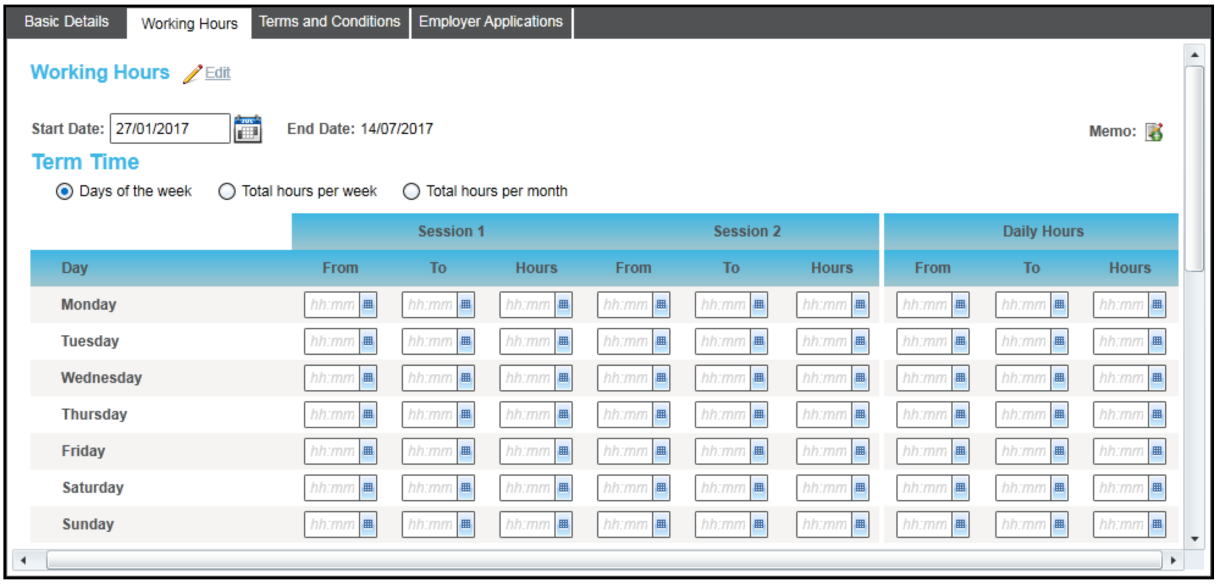
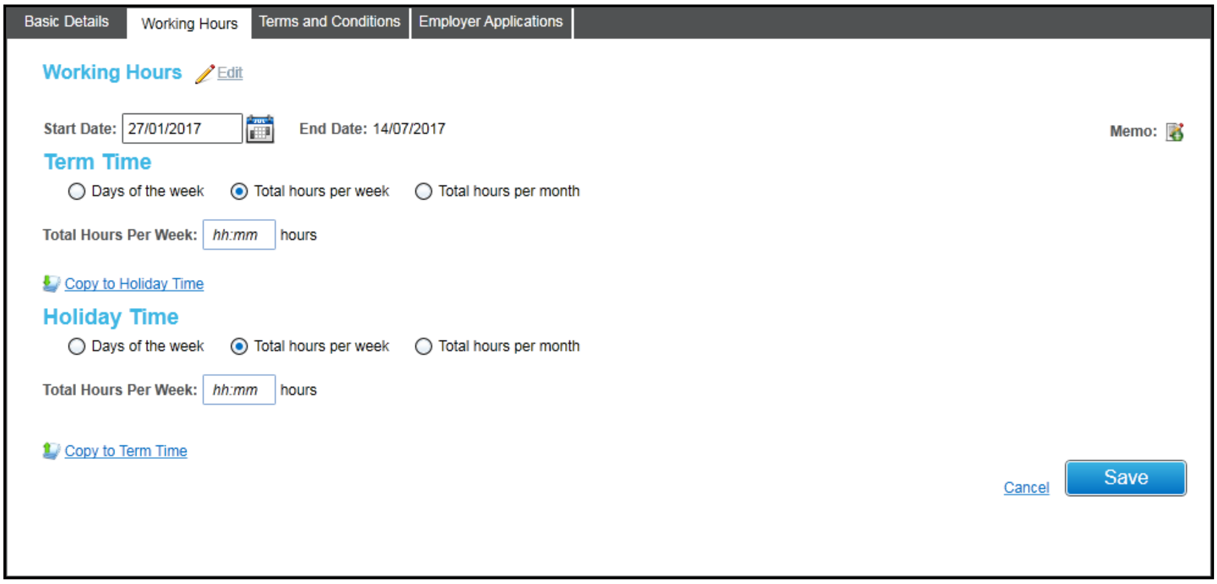


3. Click the **Edit** hyperlink to enable editing.



4. Select the **Start Date** on which the working hours will begin.
5. Select the radio button for the method you wish to use to record the working hours.



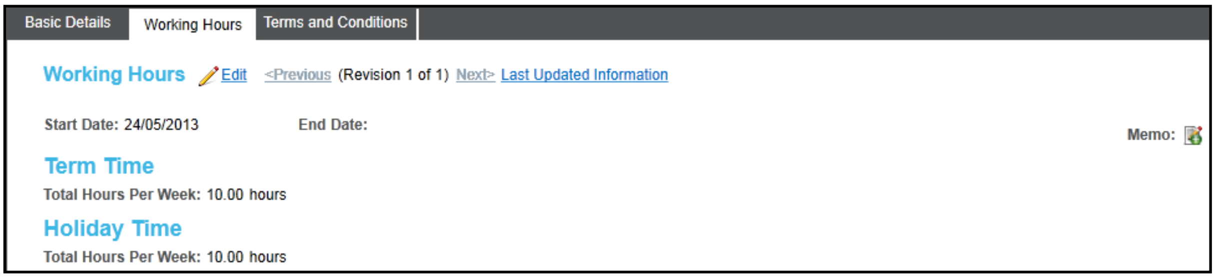
6. Enter the required hours in the **hh:mm** field. The surrounding text adjusts depending on the radio button selected.
7. If required, enter the **Holiday Time** working hours.

   If the student will work the same hours in holiday time, click the **Copy to Holiday Time** hyperlink to populate the holiday working hours.
8. Click the **Save** button to record the working hours.

Revising Working Hours

It is possible to edit a student's working hours to reflect changes in their working time arrangements. However, to maintain a historical record of the working schedule, a new **Start Date** must be entered before saving. This creates a new revision record. Any revisions can be viewed, but only the most recent revision can be edited. Additionally, any new start date must be after the previous revision's start date.

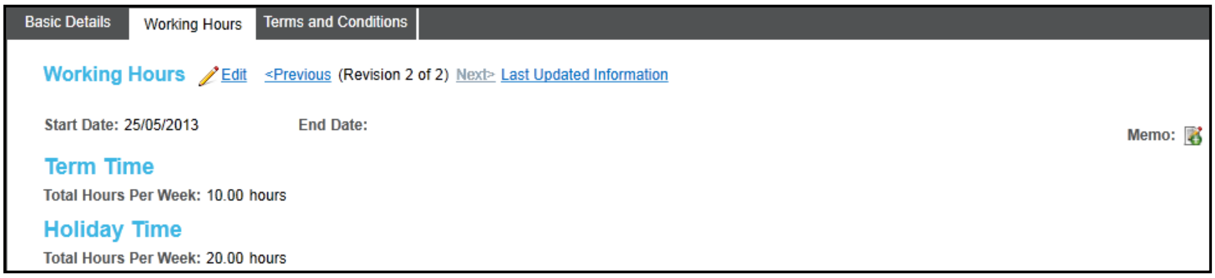
1. Open the required application. For more information, see Opening an Application on page *93*.
2. Select the **Working Hours** tab to display current working hours.



3. Click the **Edit** hyperlink to enable editing.
4. Make the required changes to the working hours. For more information, see Adding Working Hours for Specific Days and Times on page *14* or Adding Working Hours as Daily Hours, Total Hours Per Week or Total Hours Per Month on page *15*.
5. Select a new **Start Date**.

IMPORTANT NOTE: *If you do not update the* ***Start Date****, when the record is saved, the existing record is overwritten and no revision record is created.*

6. Click the **Save** button to display the **Working Hours** confirmation dialog.
7. Click the **Yes** button to record the working hour changes.

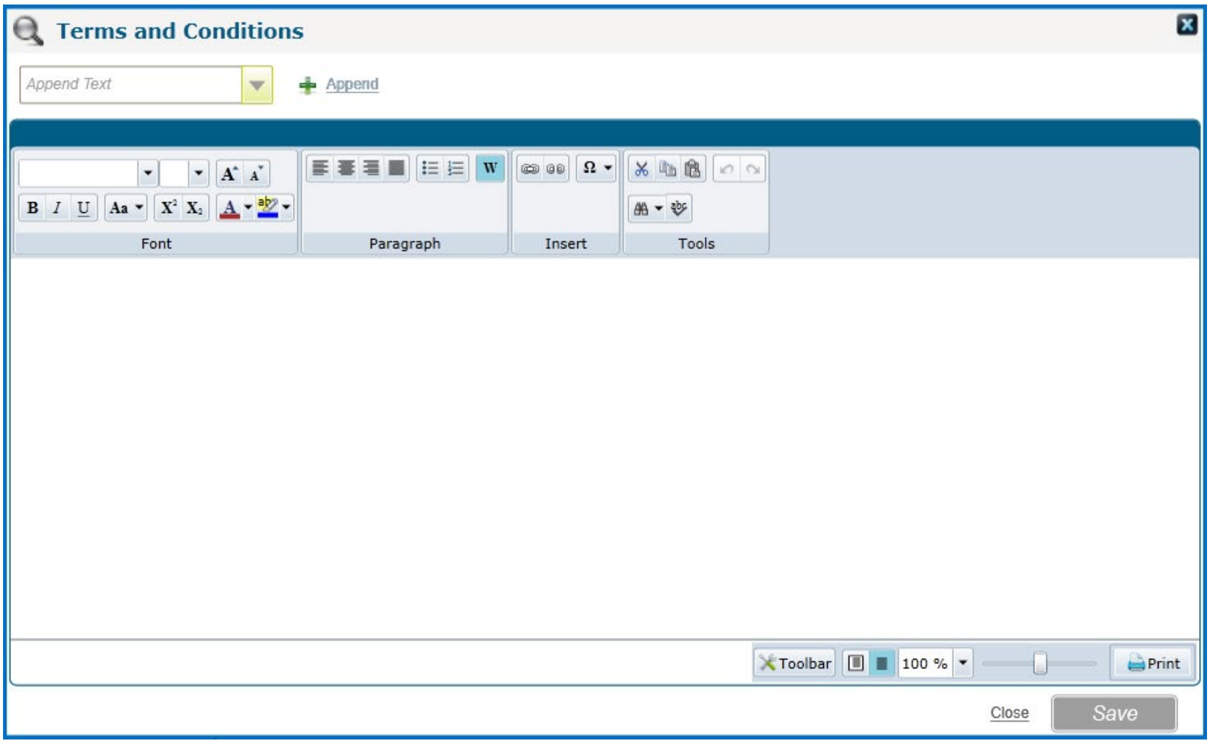


Editing Terms and Conditions

The **Terms and Conditions** tab consists of two areas, the **Terms and Conditions** text box and the **Authorisation** section. The **Terms and Conditions** text box enables you to view and enter specific information related to the student's employment. The **Authorisation** area enables you to view and edit information related to the permissions granted by interested parties, such as parents and Local Authorities. For more information, see Editing Authorisation Details on page *18*.

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Click the **Terms and Conditions** tab to display the **Terms and Conditions** text box.

3. Click the **Edit** hyperlink to display the **Terms and Conditions** editing window.



4. Enter any required text. Use the tools to format the text as required.
5. If required, you can select pre-defined messages from the **Append Text** drop-down list then click the **Append** hyperlink to add the text to the text box.
6. Click the **Save** button to save the text.
7. When all the required text is entered, click the **Close** hyperlink to return to the **Terms and Conditions** tab.

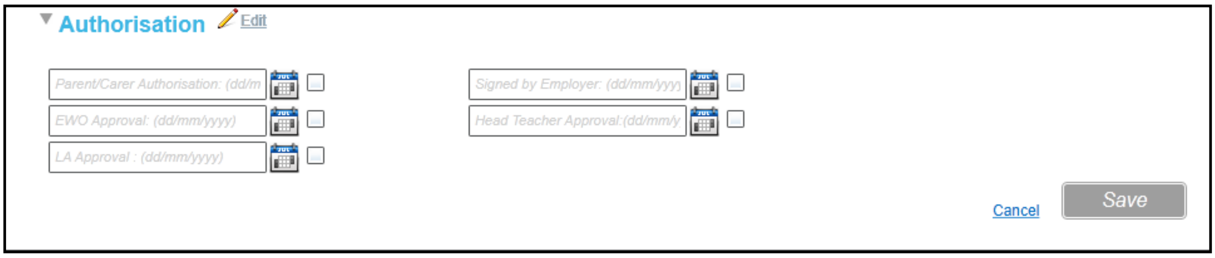
More Information:
Adding Predefined Text for Terms and Conditions Details on page *6*

Editing Authorisation Details

The **Authorisation** area records whether or not a specific third party has provided their consent for the child to participate in the employment. If the required authorisations are not recorded, the work permit cannot be created.

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Click the **Terms and Conditions** tab to display the **Authorisation** area.

3. Click the **Edit** hyperlink in the **Authorisation** section to enable editing.



4. For each party from which you have received authorisation, enter the date when the authorisation was received. The check box is selected automatically when a date is entered.

   Alternatively, you can select a check box without entering a date.

5. Click the **Save** button to record the authorisations.

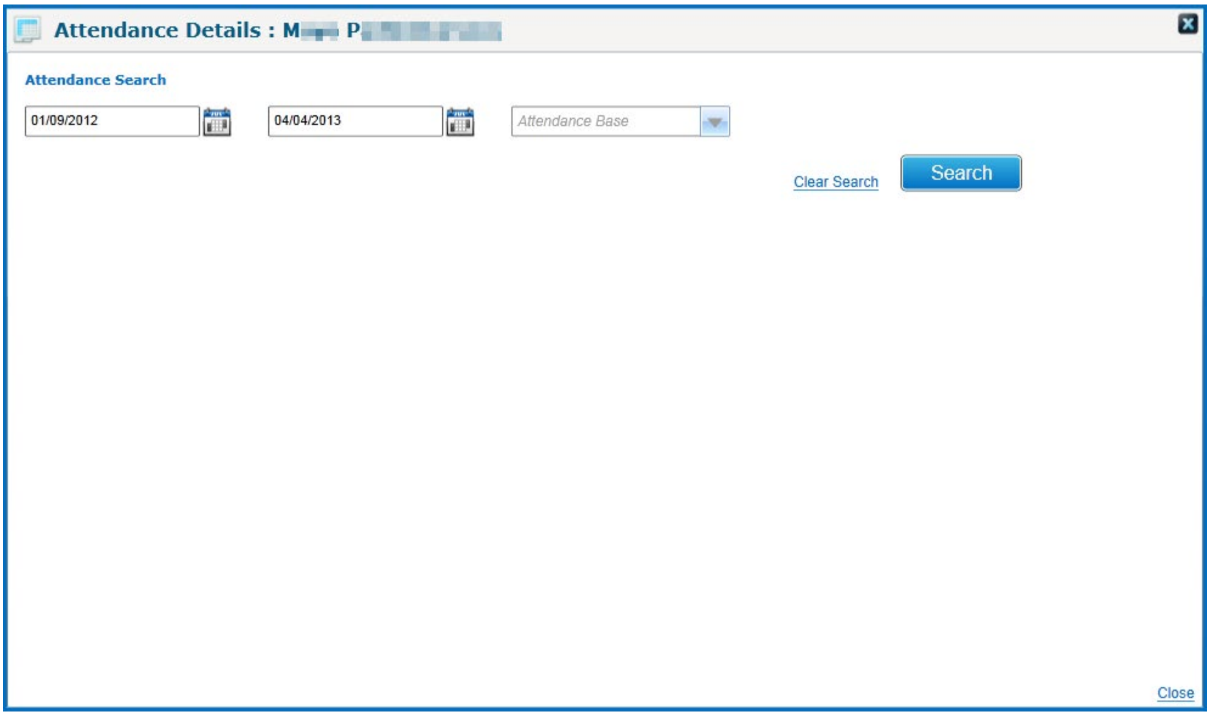
More Information:
Work Permit Conditions *on page 4*

Viewing School Attendance Details

Before issuing a work permit or when reviewing a work permit that has already been issued, it can be useful to view a student's school attendance record. You can view the attendance information that has been recorded for the student in the One v4 Client.

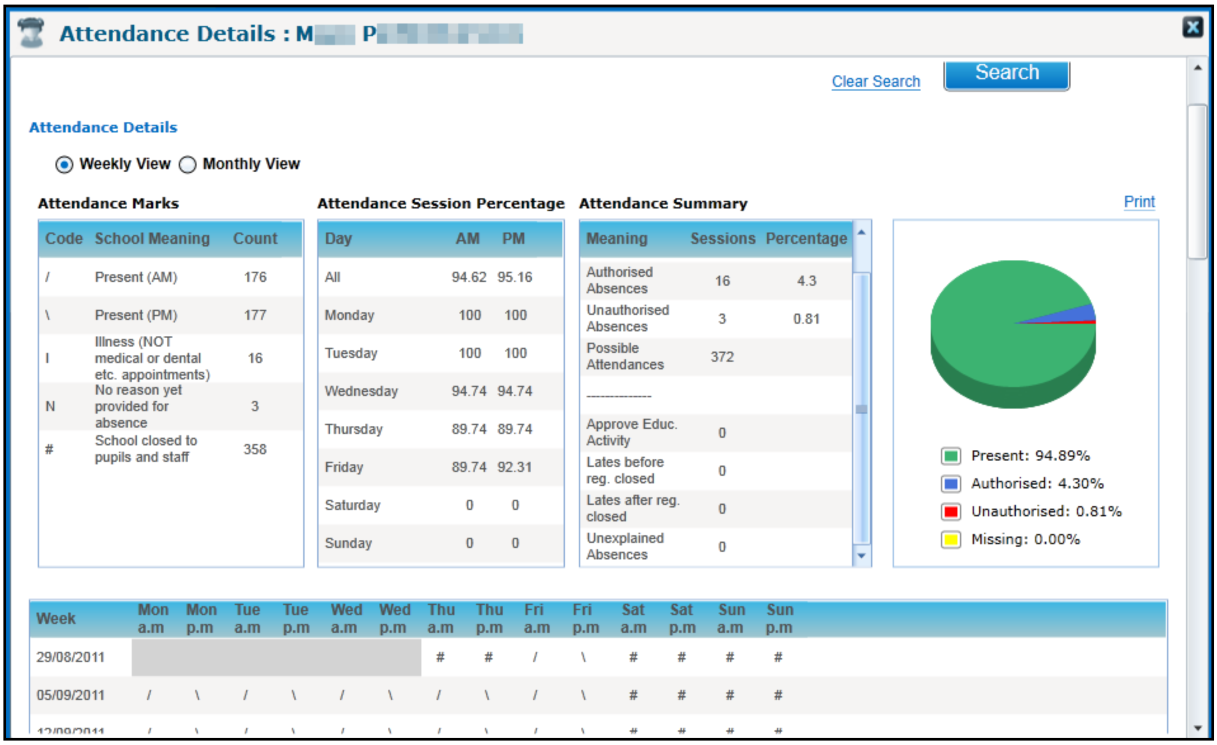
Viewing School Attendance via Student Details

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Click the **View Student Details** hyperlink to display the student's details.
3. Select the **Employment Details** tab.
4. Click the **Attendance Details** hyperlink to display the **Attendance Details** dialog.



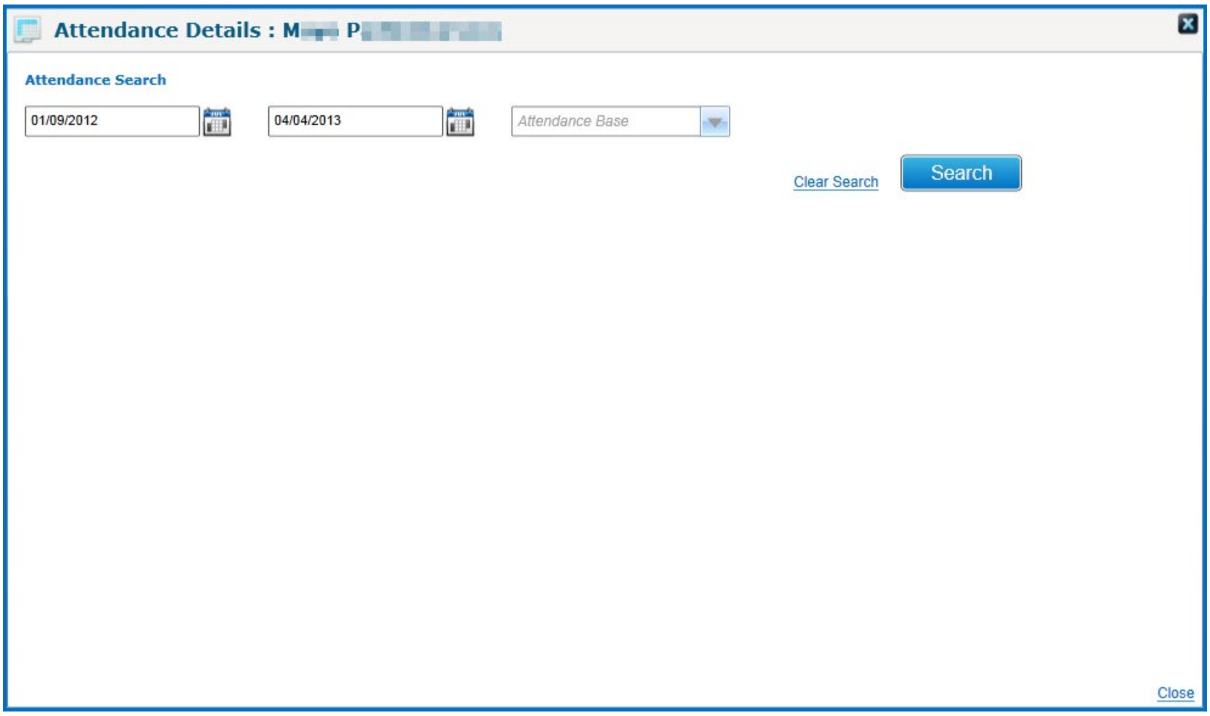
5. Enter the dates for which you wish to view the student's attendance and select the required base from the drop-down list.

6. Click the **Search** button to display the attendance details.



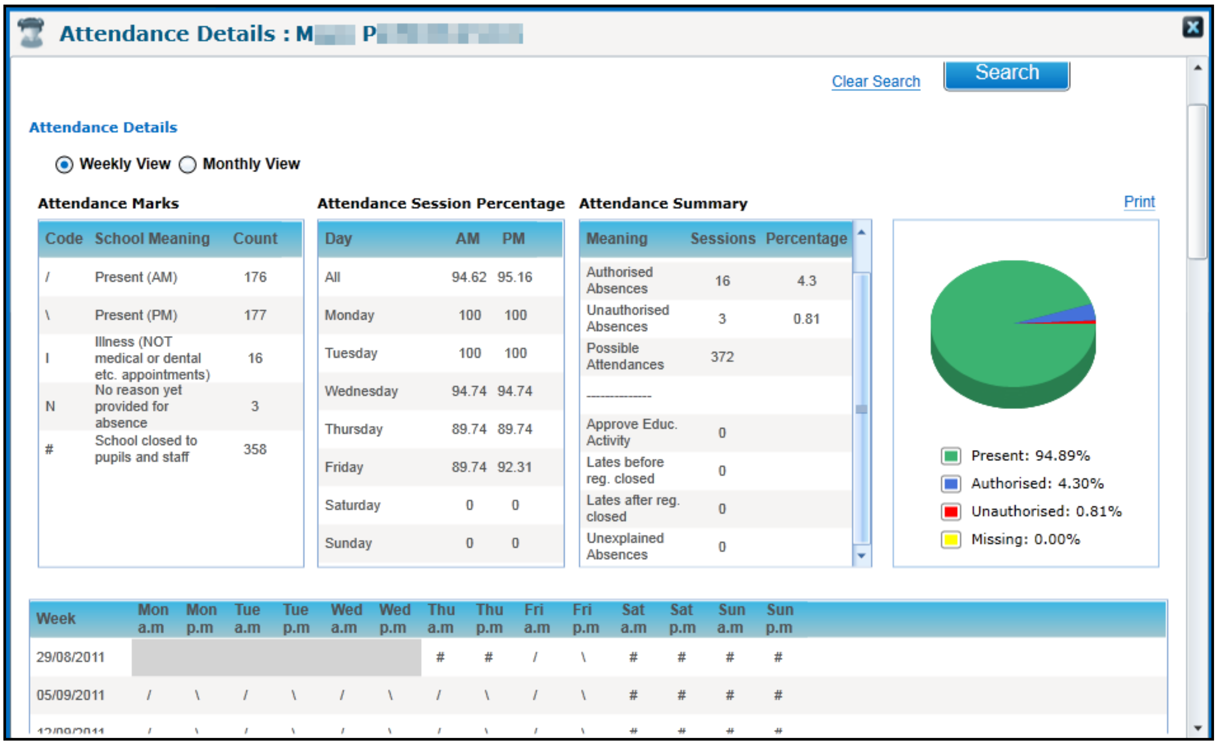
Viewing School Attendance via the Student Employees List

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Click the **View Employer Details** hyperlink to display the employer details.
3. Click the **Attendance Details** hyperlink to display the **Attendance Details** dialog.



4. Enter the dates for which you wish to view the student's attendance and select the required base from the drop-down list.

5. Click the **Search** button to display the details.



Editing an Employment Application Status

An employment application's status can be manually changed to any value but **ISS** – Issued or **REV** – Revised.

1. Open the required application. For more information, see Opening an Application on page *93*.
2. In the **Basic Details** tab, click the **Edit** hyperlink adjacent to **Application Summary** to enable editing.
3. Select the required **Application Status**.

   If the application is approved, select **APP – Approved**. After saving, you can then issue the work permit.
4. Click the **Save** button to record the status change.

Generating and Printing a Work Permit

After an employment application is approved, the work permit can be issued. Issuing the work permit is a two-stage process. First, you must generate the work permit, then you must print it.

When you choose to generate a work permit, One runs the following validations before issuing it:

- Checks the **Work Permit Report** is selected (this is configured by your system administrator).
- Checks the application status is either **Approved** or **Revised**.
- Checks that working hours are entered for the application.
- Checks whether all the required **Authorisations** in the **Terms and Conditions** tab have been obtained.

If all the preconditions are met, you can create a work permit by completing the following steps:

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Click the **Generate Workpermit** hyperlink to create the work permit and display the **Generate Workpermit** confirmation dialog.
3. Click the **Yes** button to close the dialog and complete the process.

   The **Application Status** is now **Issued** and the **Employment Permit Issued** is populated with the issue date.
4. Click the **Print Workpermit** hyperlink to print the work permit.

Deactivating an Employment Application

Employment applications can be deactivated so that they are not visible by default when searching for employment applications. The routine used can deactivate multiple applications at once, which can be useful if you want to deactivate all applications for students over 18, for example.

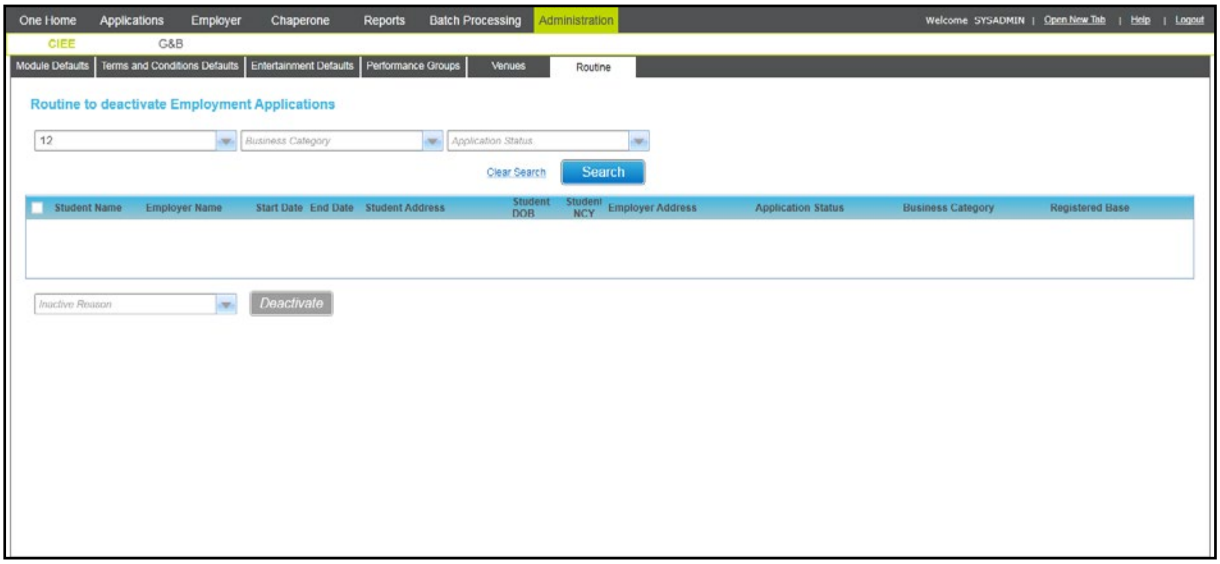
Deactivated applications can be viewed by deselecting the **Active Only** check box when searching for applications.

You can make any employment application inactive. You can also delete the application if no licence has been issued against it. For more information, see Deleting an Application on page *97.*

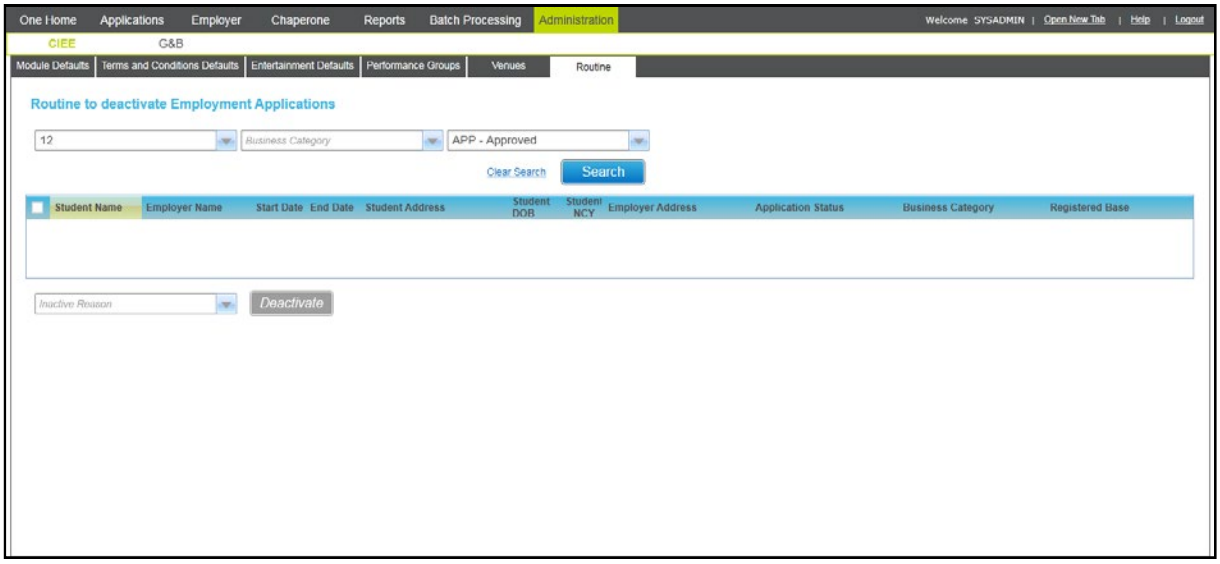
NOTE: To deactivate an employment application, *you must be a member of a user group with Read-Write access to the **Employment Routine** business process under the **CIEE** main business process.*

To deactivate an application:

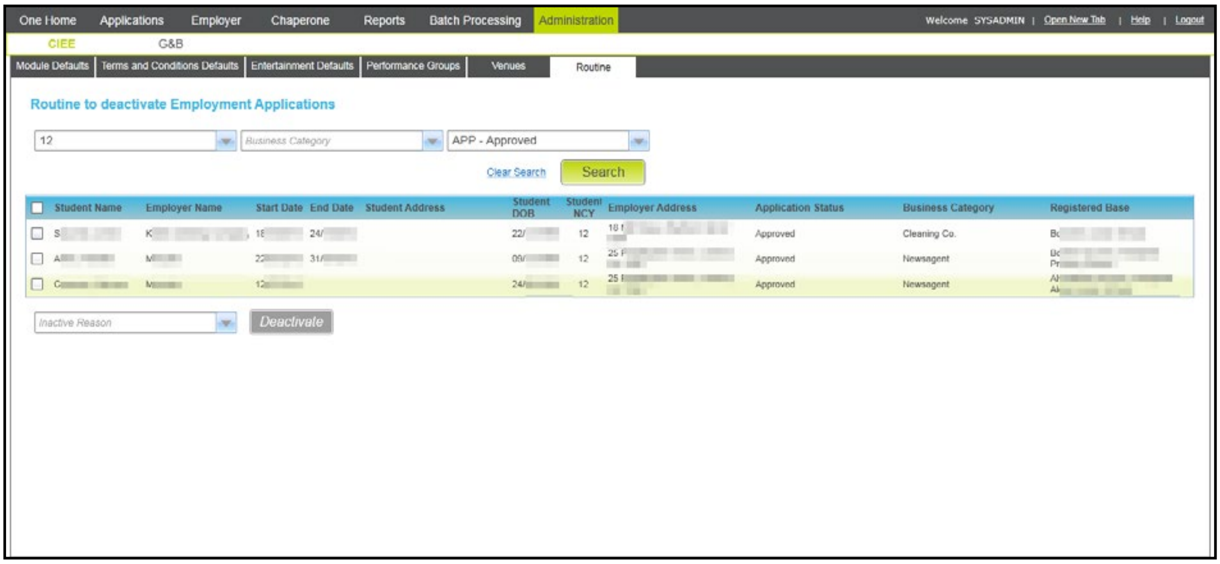
1. Select **Administration | CIEE | Routine** to display the **Routine to deactivate Employment Applications** page.



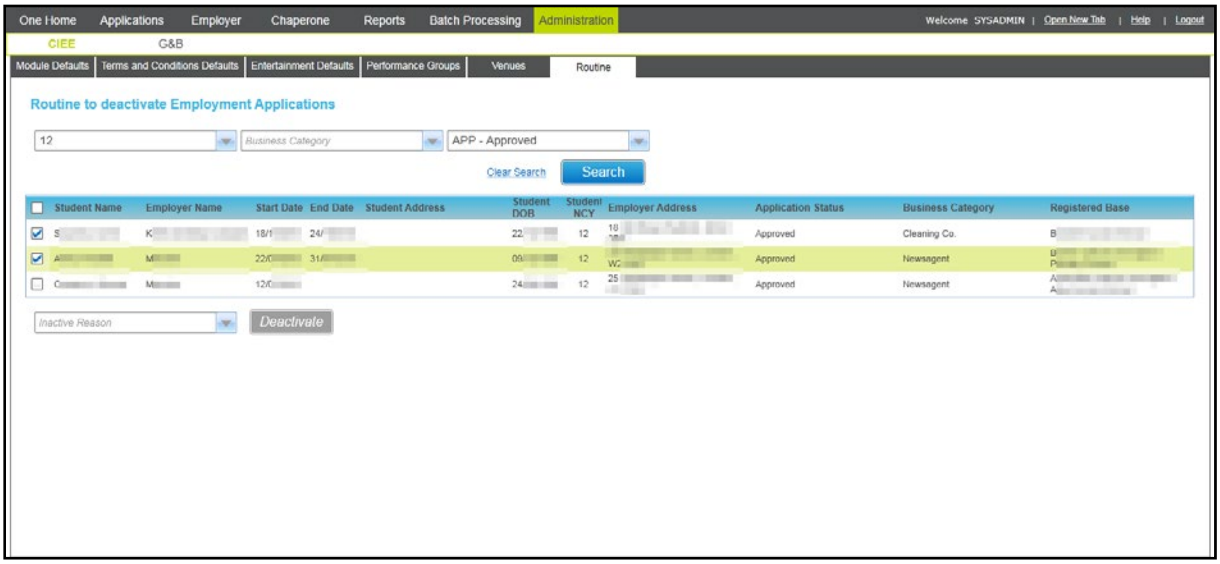
2. Select the search criteria for the applications you want to deactivate.



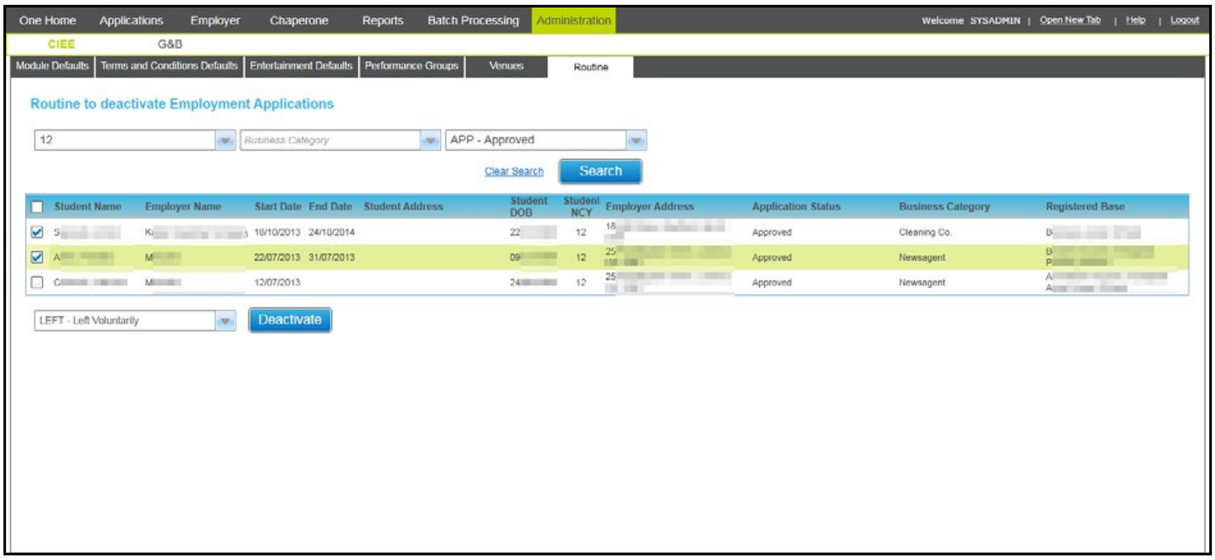
3. Click the **Search** button to display all the applications that match the search criteria.



4. Select the check box for the applications you want to deactivate. Selecting the check box next to the **Student Name** column header selects all the applications.



5. Select the reason you are deactivating the applications from the **Inactive Reason** drop-down list.



6. Click the **Deactivate** button to display a confirmation dialog.
7. Click the **Yes** button to deactivate the selected applications. An additional confirmation dialog displays when the routine has finished.

04 | Administering Entertainment Options

Introduction

One administrators can configure Children in Entertainment via the **Administration** area.

There are three entertainment related configuration tabs, **Entertainment Defaults**, **Performance Groups** and **Venues**.

For organisations that have migrated an existing version of the CIEE software from the One v3 Client to One v4 Online, your administration settings are maintained. However, you can edit these settings in One v4 Online if required.

For organisations setting up CIEE for the first time, complete these procedures to configure your system to suite your needs.

Understanding Entertainment Defaults

The **Entertainment Defaults** tab can be used to configure the following key areas of the employment related CIEE software:

- Licence Condition Defaults
- Report Defaults.

Licence Condition Defaults

When any of these options is selected, the LA must obtain and record permission for each of the selected entities in the **Licence Conditions** tab of the entertainment application before the licence can be issued. The available licence conditions are:

- Birth Certificate
- Photos
- Declaration
- Head Teacher Approval
- Medical Clearance
- Contract
- Parent/Carer Authorisation.

Report Defaults

Before any entertainment licences can be created in One v4 Online, the report defaults must be selected. The report defaults are Crystal Reports that CIEE uses to format and create the printable version of the performance licence.

Select a report for each type of licence, **Performance (Composite) Default Licence**, **Performance (Individual) Default Licence** and **Chaperone Default Licence**.

Click the browse button to select the Crystal Report to use when generating the work permit and the default number of copies.

Editing Entertainment Defaults

To edit any of the values in the **Entertainment Defaults** tab:

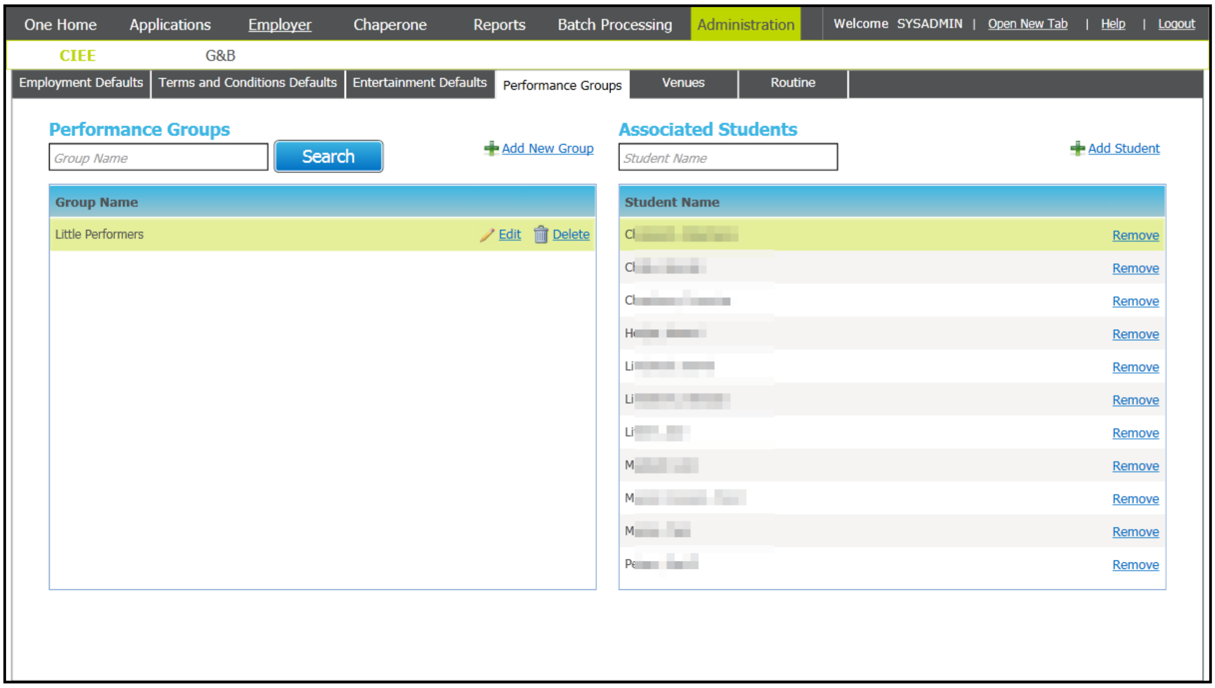
1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Entertainment Defaults** tab.
3. Click the **Edit** hyperlink to enable editing.
4. Make the required changes. For more information, see Understanding Entertainment Defaults on page *26*.
5. After making the required changes, click the **Save** button.

Managing Performance Groups

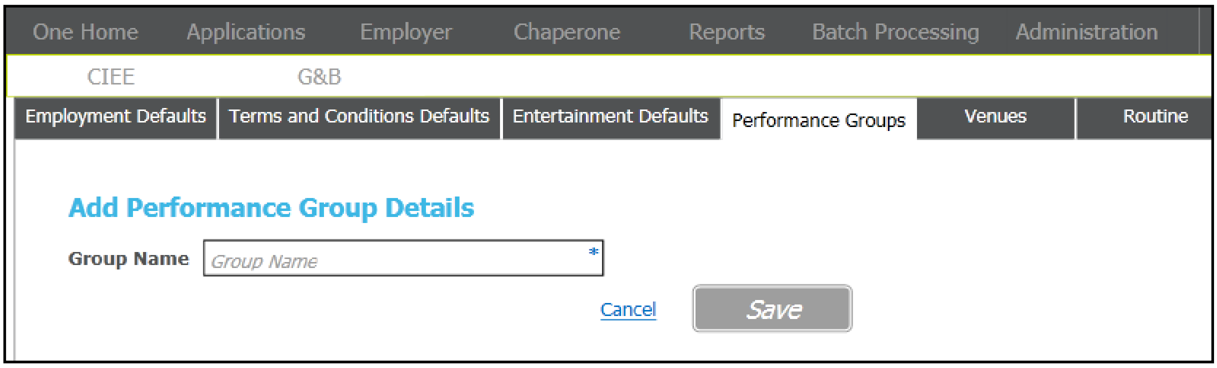
Performance groups are collections of students that have been grouped together to make the creation of new performance licence applications quicker. When creating a new entertainment application, a performance group can be selected as a search criterion and only the members of that group are displayed in the search results. Users can then select the required students and create the applications.

Creating a New Performance Group

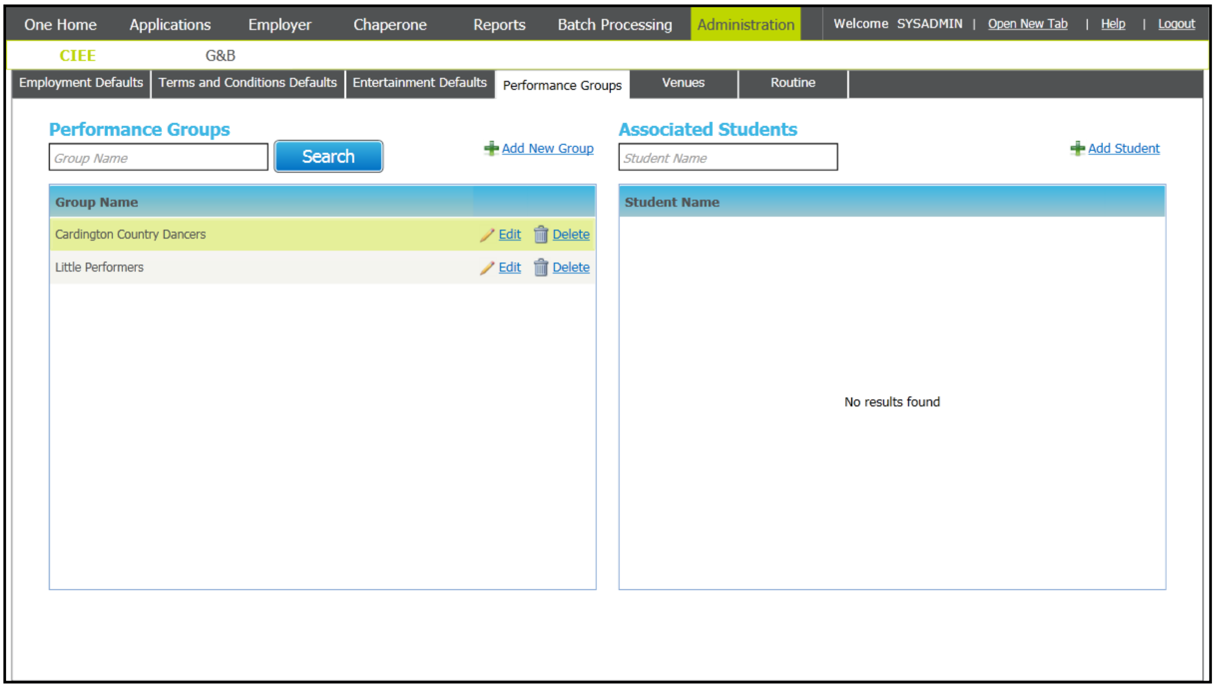
1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Performance Groups** tab to display the **Performance Groups** and **Associated Students** lists.



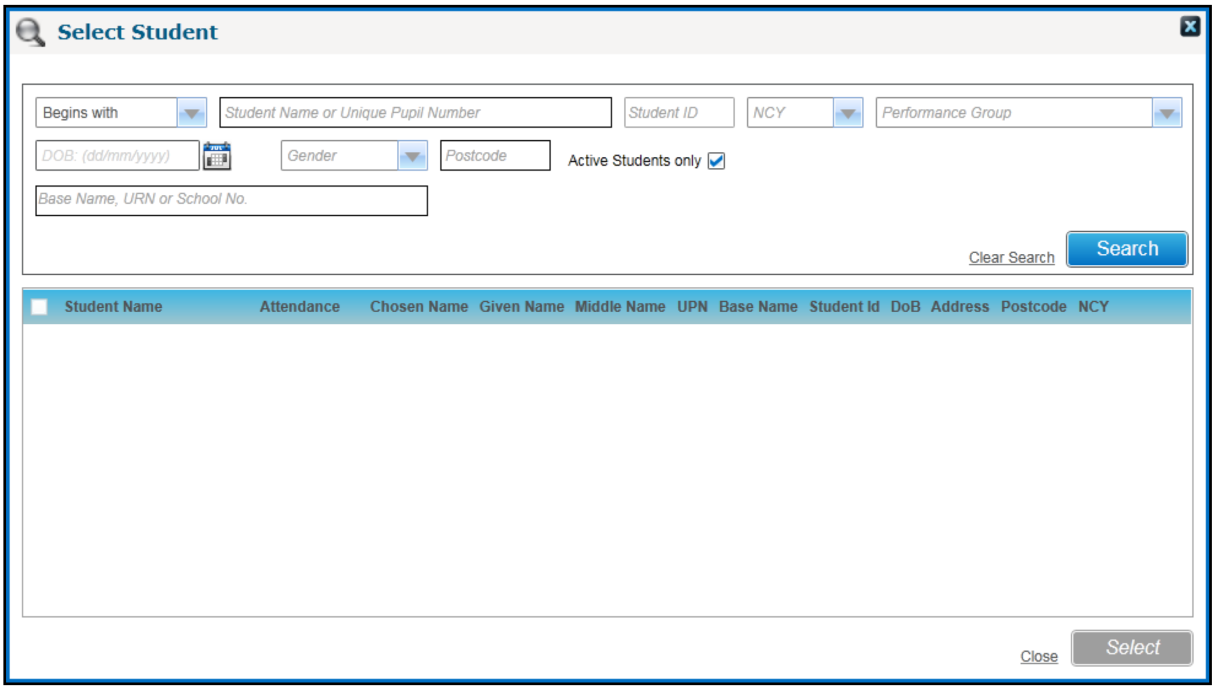
3. Click the **Add New Group** hyperlink to display the **Add Performance Group Details** section.



4. Enter a **Group Name**.
5. Click the **Save** button to add the group to the **Performance Groups** list.



6. To associate a student with the group, click the **Add New Student** hyperlink to display the **Select Student** dialog.



7. Enter the required search criteria then click the **Search** button to display a list of students who meet the entered search criteria**.**
8. Select the check box adjacent to the required students in the list.

   If you need to search for students with different search criteria, enter the new search criteria then click the **Freeze & Search** button. The students you have already selected remain selected and the students that meet your new search criteria are displayed below a red line.
9. Click the **Select** button to add the students to the **Associated Students** list.

Editing a Performance Group

1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Performance Groups** tab to display the **Performance Groups** and **Associated Students** lists.
3. For the performance group you wish to edit, click the **Edit** hyperlink to display the **Edit Performance Group Details** section.
4. Edit the **Group Name**.
5. Click the **Save** button.

Deleting a Performance Group

1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Performance Groups** tab to display the **Performance Groups** and **Associated Students** lists.
3. For the performance group you wish to delete, click the **Delete** hyperlink to display the **Performance Groups** confirmation dialog.
4. Click the **Yes** button to delete the group.

Removing a Student from a Performance Group

1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Performance Groups** tab to display the **Performance Groups** and **Associated Students** lists.
3. For the student you wish to remove from the performance group, click the **Remove** hyperlink to display the **Performance Groups** confirmation dialog.
4. Click the **Yes** button to remove the student.

Managing Venues

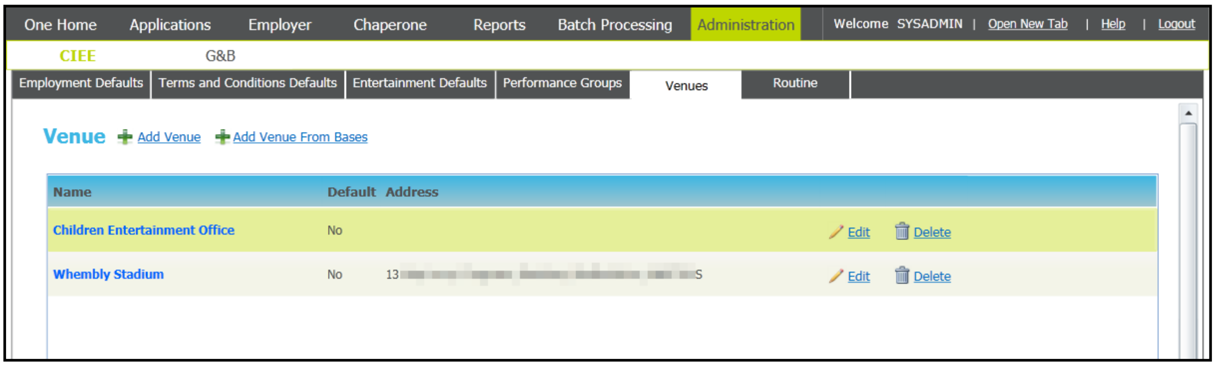
Venues are the names and addresses of places that can be selected as an interview location when recording a chaperone interview. If more than one venue is added in the **Venues** tab, you can set which venue should be the default option when a user is creating a new interview record.

An entirely new venue can be created or you can add a venue that is already a base in One.

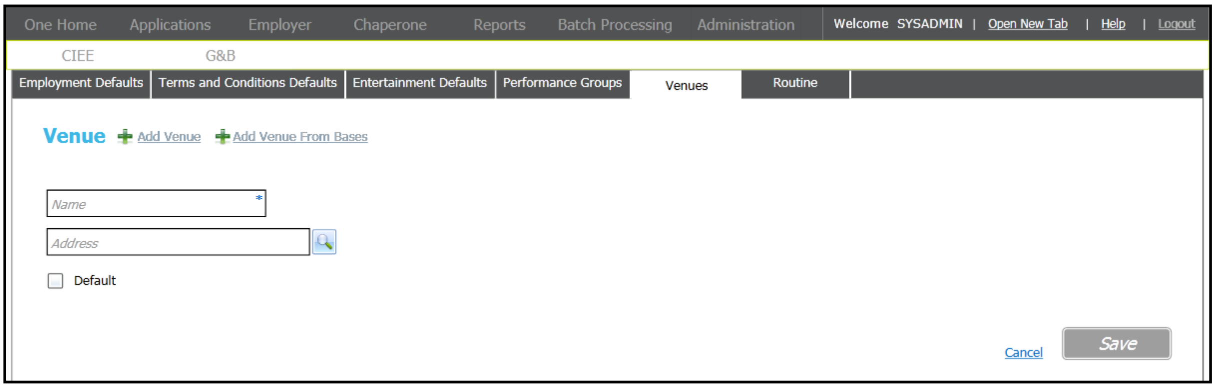
More Information:
Adding a New Venue That is Not a Base on page 30
Adding a Venue from a Base *on page 32*

Adding a New Venue That is Not a Base

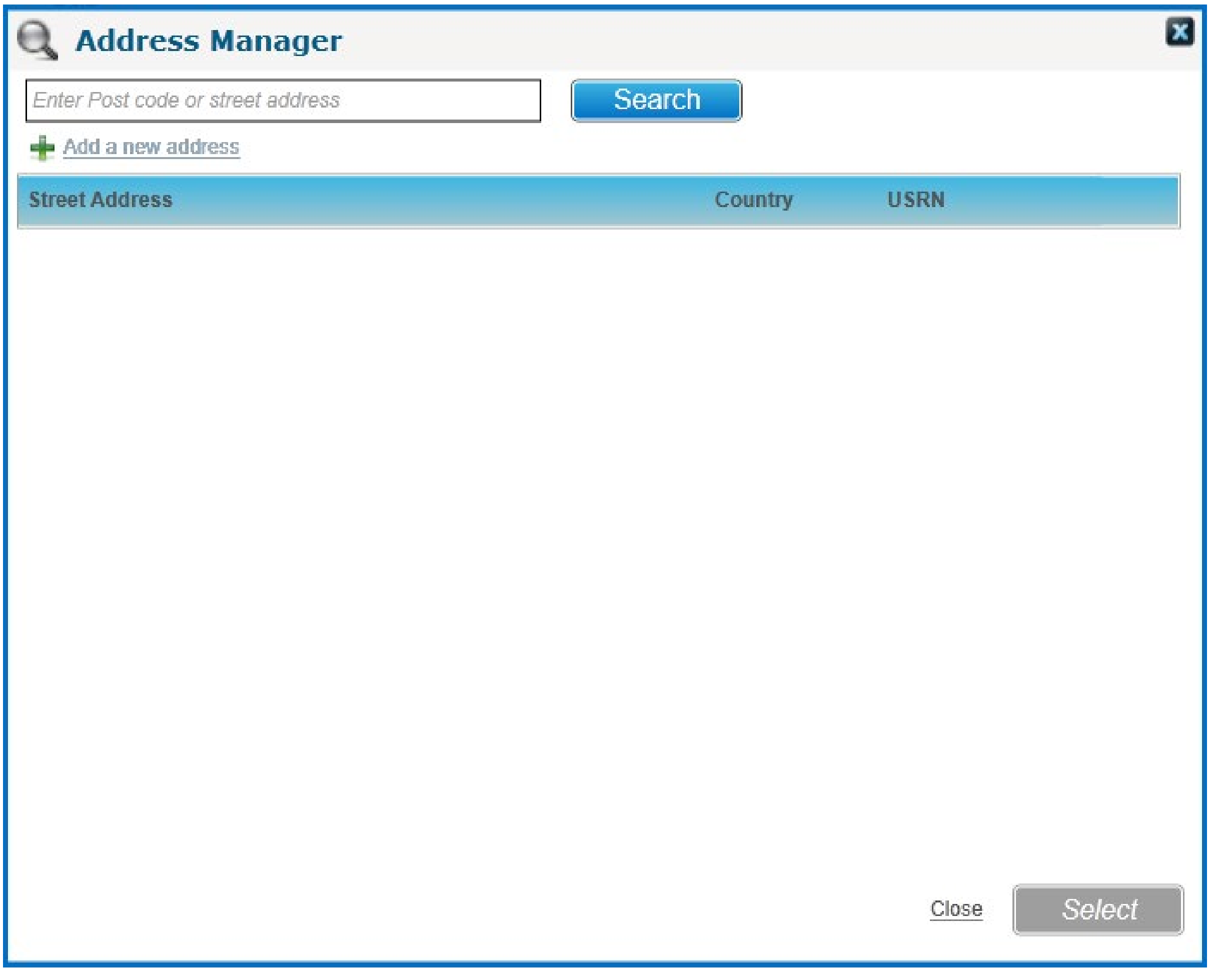
1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Venue** tab to display the **Venue** list.



3. Click the **Add Venue** hyperlink to display editable **Name** and **Address** fields.

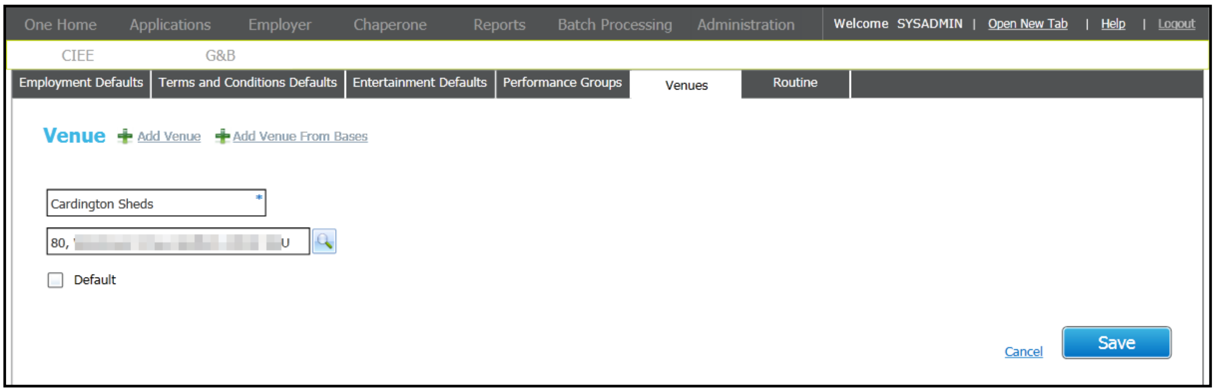


4. Enter a venue **Name**.
5. Click the **Address** browse button to display the **Address Manager** browser.



6. Enter any known address details and click the **Search** button to display a list of locations in One that meet the entered search criteria.
7. Highlight the required address then click the **Select** button to add the address to the venue.

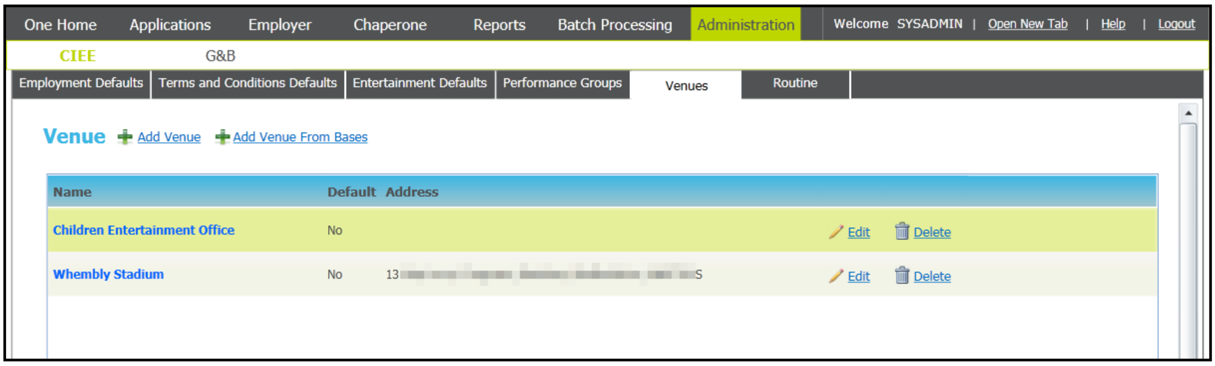
   If none of the results correspond to the venue's address, click the **Add a new address hyperlink** to display blank address detail fields. Enter the new address details then click the **Save** button and select the address.



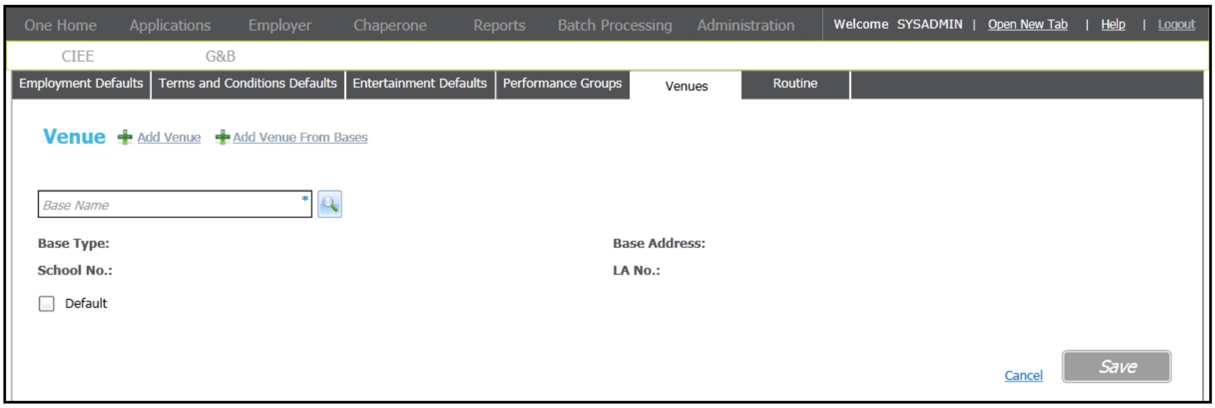
8. If the venue should be the default option when creating a new interview record, selected the **Default** check box.
9. Click the **Save** button to record the venue details.

Adding a Venue from a Base

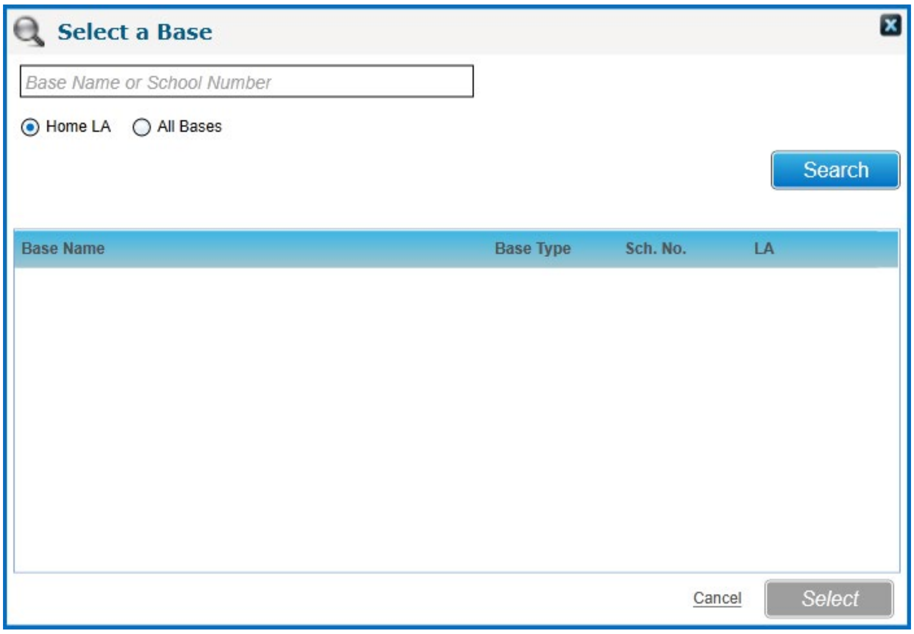
1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Venue** tab to display the **Venue** list.



3. Click the **Add Venue From Bases** hyperlink to display the **Base Name** field.



4. Click the **Base Name** browse button to display the **Select a Base** browser.



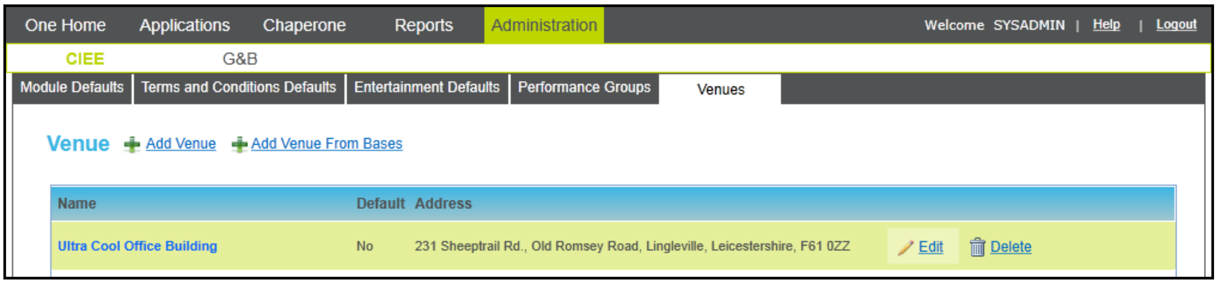
5. Enter the required search criteria then click the **Search** button to display a list of bases that meet the entered search criteria.
6. Highlight the required base then click the **Select** button to close the dialog and populate the venue information with the selected base information.

7. If the venue should be the default option when creating a new interview record, select the **Default** check box.
8. Click the **Save** button to record the venue details.

Editing a Venue

After creating a venue, you can edit its name or address and whether or not it is the default venue for interview records.

1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Venue** tab to display the **Venue** list.

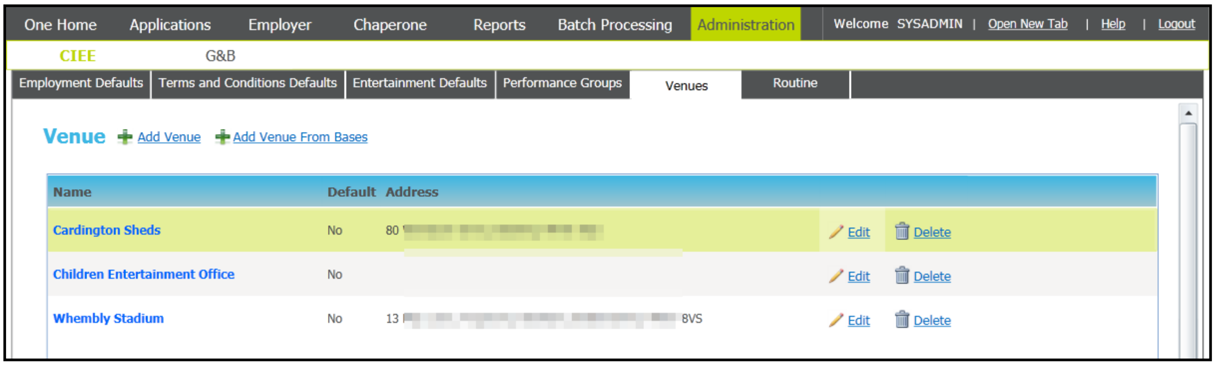


3. For the venue you wish to update, click the **Edit** hyperlink to enable editing.
4. Update the name and address as required.
5. Set the **Default** value as required.
6. Click the **Save** button.

Deleting a Venue

If a venue is no longer required, you can delete it from the venue list. However, you cannot delete a venue if it is associated with any chaperone interview records. Therefore, you must either update any chaperone interview records currently using the venue to a different venue or delete chaperone interview records entirely before deleting the venue.

1. Select the **Administration** area and ensure the **CIEE** page is selected.
2. Select the **Venue** tab to display the **Venue** list.



3. For the venue you wish to delete, click the **Delete** hyperlink to display the **Delete Venue** confirmation dialog.
4. Click the **Yes** button to delete the venue.

05 | Creating Entertainment Applications and Licences

Introduction

After configuring the Children in Entertainment module, you can begin to create applications and issue performance and chaperone licences. In order to create a licence that can be printed and distributed to the relevant parties, you must complete the following six steps.

1. Create a basic application.
2. Add a performance schedule.
3. Add a chaperone.
4. If required, record any licence condition details.
5. Generate and print the licences.

Although the intermediary steps can be completed in any order, the first step is to create a basic entertainment application and the final step is to issue and print the licence.

> ***NOTE:*** *In previous versions of CIEE, entertainment companies were called applicants, this terminology has changed and they are now called employers.*

Understanding Entertainment Application Status Codes

An entertainment application requires an **Application Status**. By default, there are five status codes, although these may have been altered by a system administrator using the One v4 Client. Most of the codes are for your reference only and do not affect the application directly. However, licences can only be generated from applications with a status of **APP** – Approved.

The following table summarises the types of entertainment application codes.

Code	Description
APP	Approved - The default status for all applications.
AWI	Awaiting Information.
ISS	Issued - The application has been approved and the LA has generated the licence. This status cannot be selected manually; it is set automatically when the licence is generated.
PEN	Pending.
REF	Refused.

Types of Entertainment Applications

There are three types of entertainment applications: standard, open licence and body of person.

Standard entertainment applications require both an employer and student. This is the default application type. Unless one of the other options is selected when creating the application, this is the type of application that is created.

An Open Licence application enables you to add either an employer or student, depending on your needs. If you choose to add an employer, you must select a performance, but you do not need to specify the students taking place in the performance. The licence is issued to the employer for the selected performance.

Conversely, an open licence with a student added is issued to the student with no mention of specific employer or performance.

A body of person application is a standard entertainment application but with the optional **Session Absent**, **Earnings** and **Part** fields disabled.

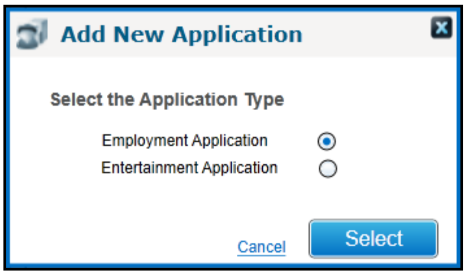
Creating a New Entertainment Application

The first step in issuing a licence is to create an application that links students to an employer and a specific performance. After creating the basic application, you must add performance schedules, chaperones and any other conditions before generating and printing the licence.

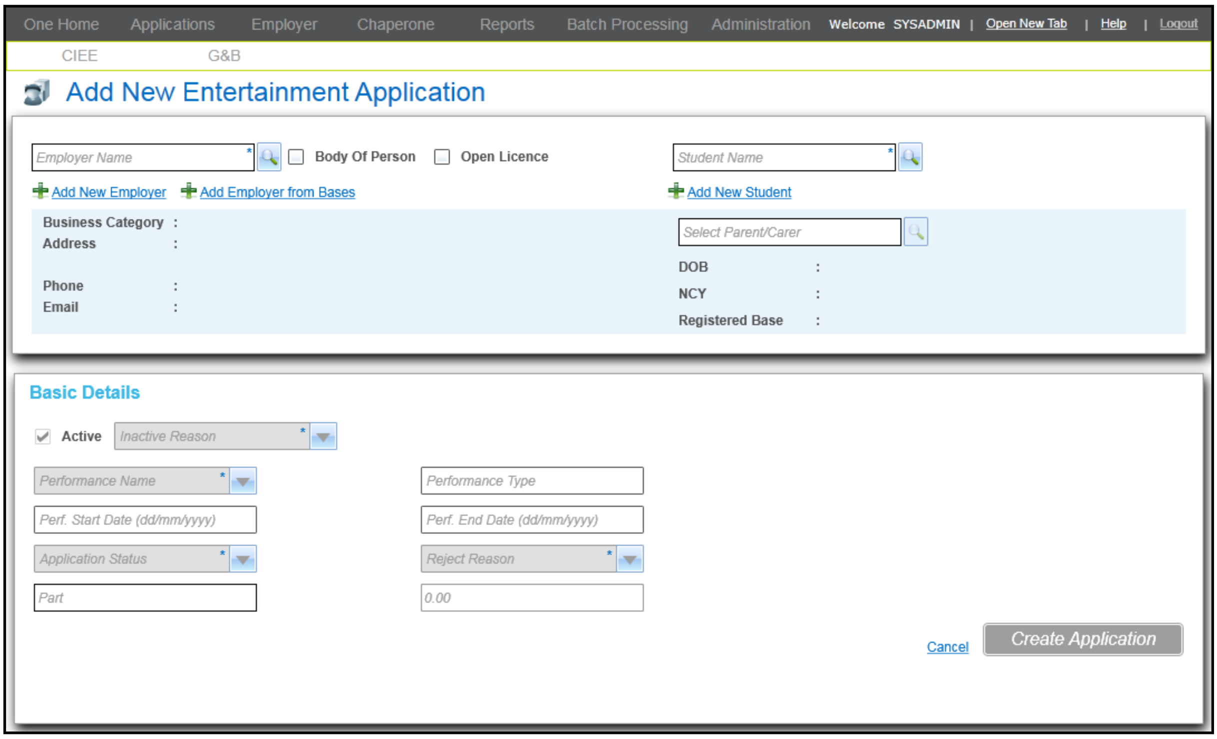
You can create the basic applications for multiple students at once. However, when the application is created, One creates an individual licence application for each student with only the basic details populated. Each application must then have the required details added, such as performance schedule, before the licence can be issued.

> ***NOTE:*** *Before a person can be added as a chaperone to an application, they must be registered as a chaperone first. It is recommended that you ensure any chaperones you require for an application are registered in One before you begin creating the application. For more information, see* *Registering a New Chaperone on page* 49.

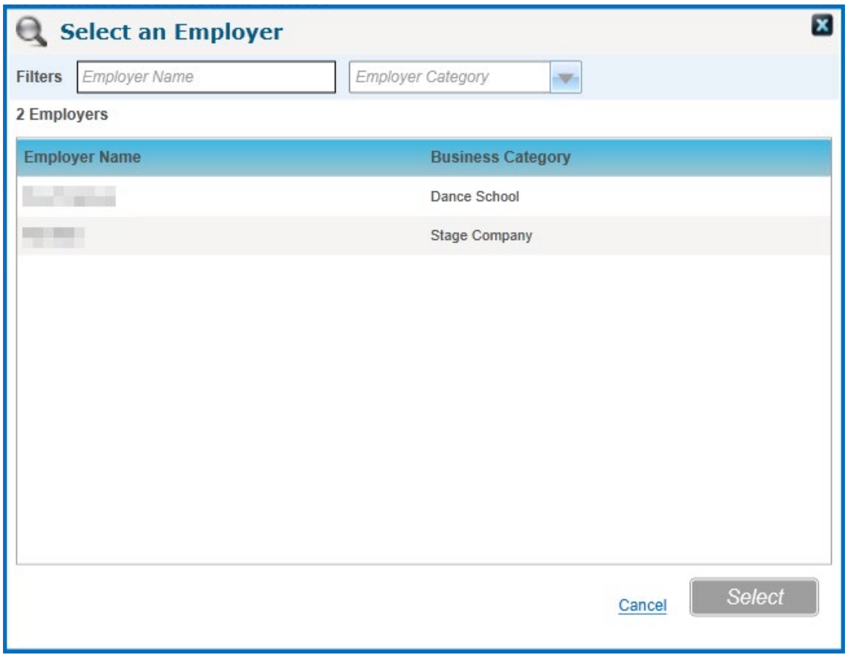
1. From the One homepage, click the **Applications** button to display the **Applications** area.
2. Click the **Add New Application** hyperlink to display the **Add New Application** dialog.



3. Select the **Entertainment Application** radio button then click the **Select** button to display the **Create New Application – Entertainment** page.

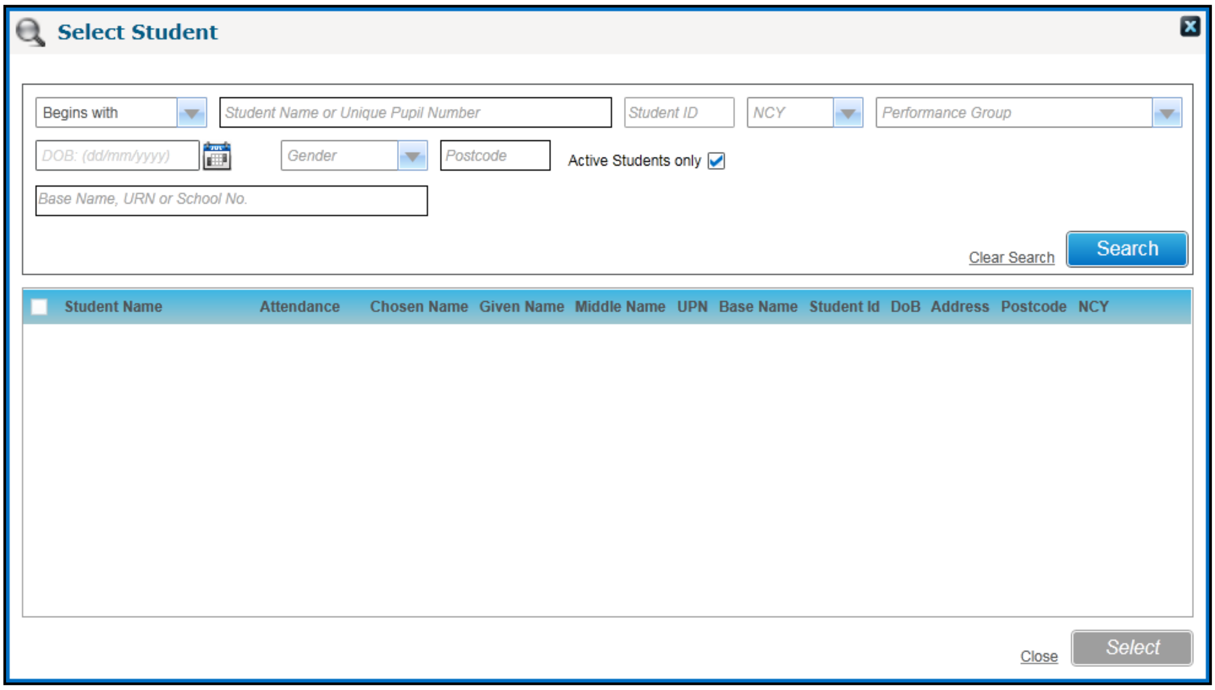


4. Click the **Employer Name** browse button to display the **Select an Employer** browser and choose the required employer.



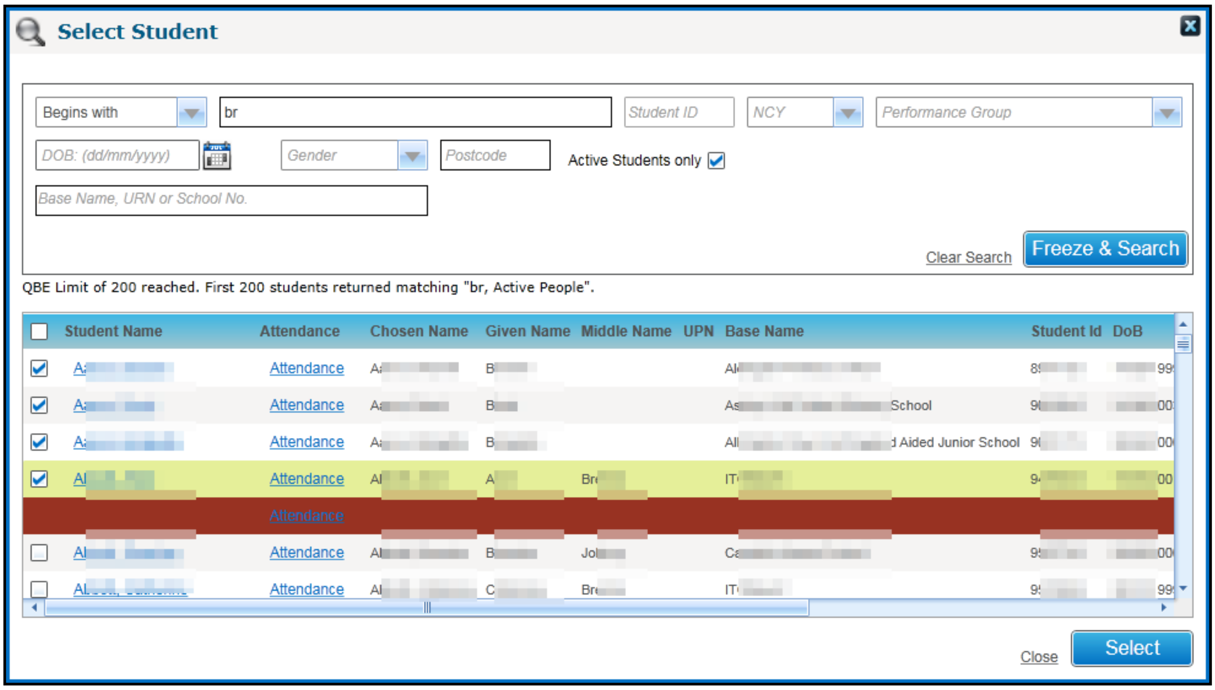
Alternatively, you can **Add New Employer** or **Add Employer from Bases**. For more information, see Creating a New Employer on page *63*.

5. Click the **Student Name** browse button to display the **Select Student** browser.

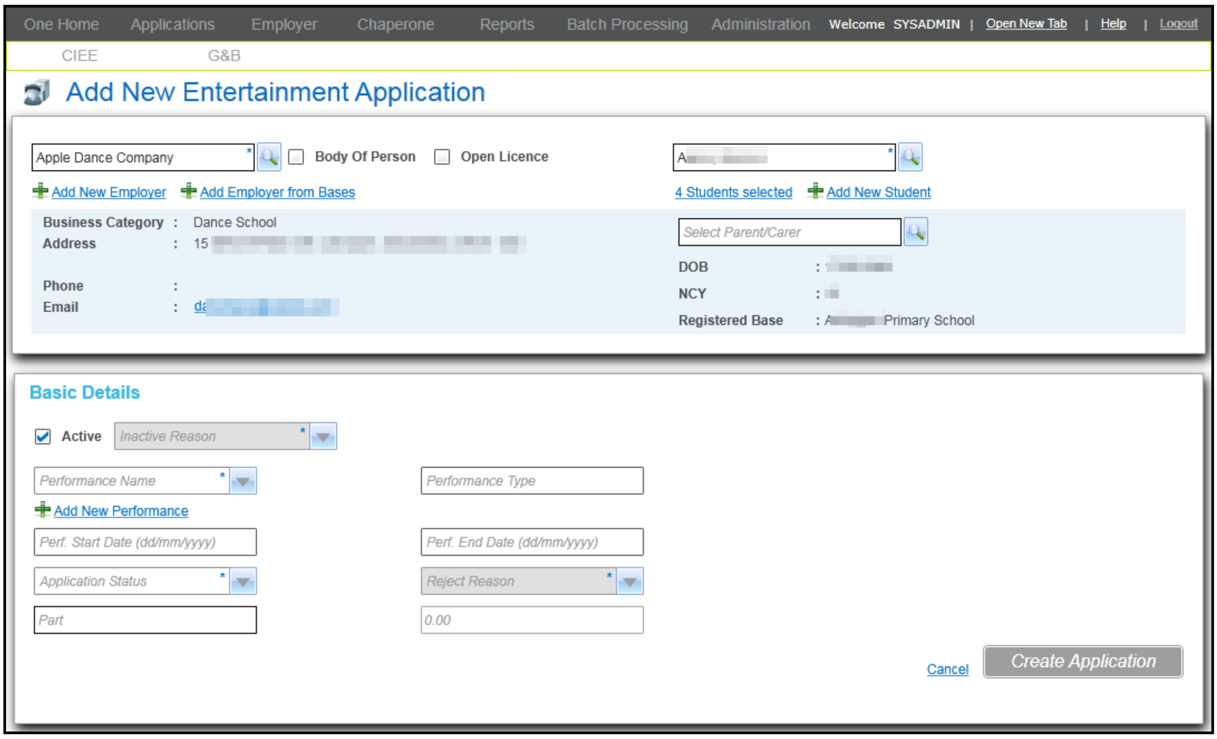


6. Search for and select the required students then click the **Select** button to add the students to the application.

   If you need to search for students with different search criteria, enter the new search criteria then click the **Freeze & Search** button. The students you have already selected remain selected and the students that meet your new search criteria are displayed below a red line.



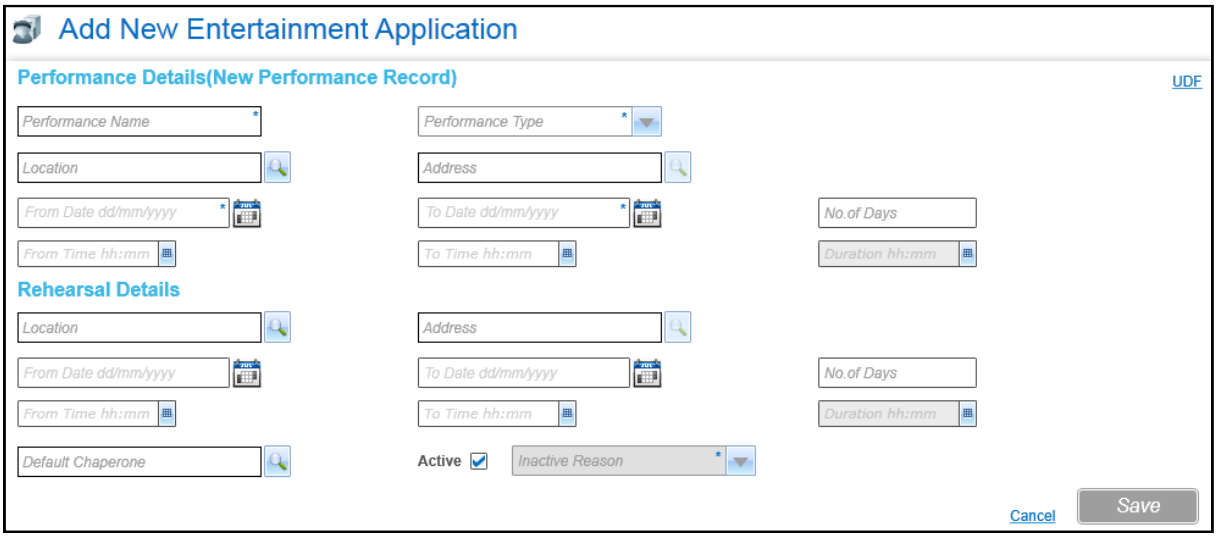
Alternatively, you can add a new student. For more information, see [Creating a New Student to Add to an Application](#) on page *92*.



7. If required, select a parent or carer.
8. Select the **Performance Name**.

   If the required performance is not listed, you can add a new one:

   a. Click the **Add New Performance** hyperlink to display the **Performance Details** dialog.

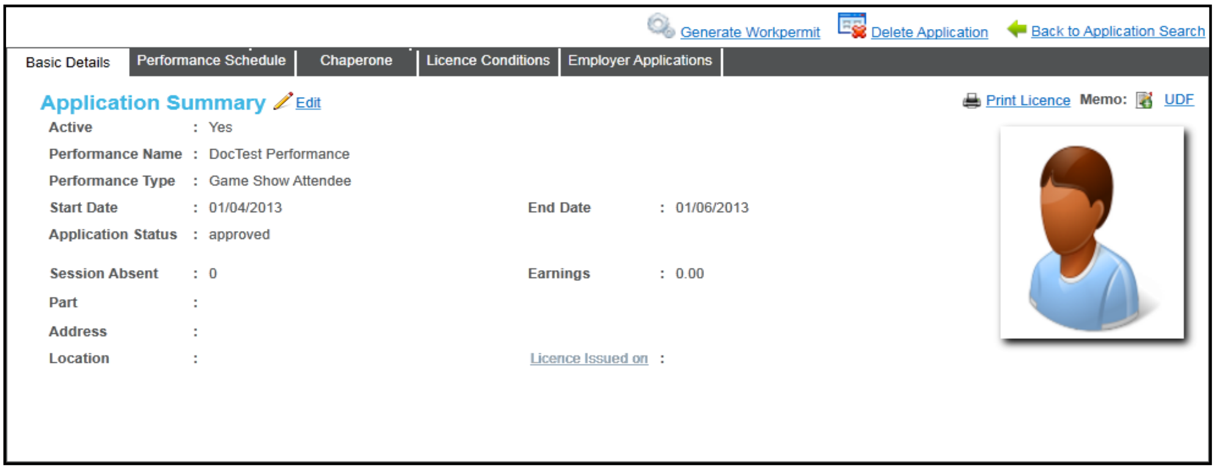
   b. Enter the performance and rehearsal details. **Performance Name**, **Performance Type**, performance **From Date** and performance **To Date** are required fields.

TIPS: *The **No. of Days** fields for a performance or rehersal are calculated automatically when you add the required start and end dates. However, if there is not a performance or rehersal every day, you can manually edit the fields. You can also enter a duration for the performance or rehersal manually.*

   c. Click the **Save** button to add the performance to the application.

9. Select the required **Application Status**.
10. If known, enter a **Performance Type**, **Start Date**, **End Date** and **Part** for the application.

11. Click the **Create Application** button to create the application and display the application details. If you created applications for multiple students, the application for the first student selected is displayed.



12. If you created multiple applications, click the **Back to Application Search** hyperlink to display a list of other applications that you created at the same time.

> ***TIP:*** *To view all the other applications for the employer associated with the currently open application, select the* ***Employer Applications*** *tab.*

More Information:

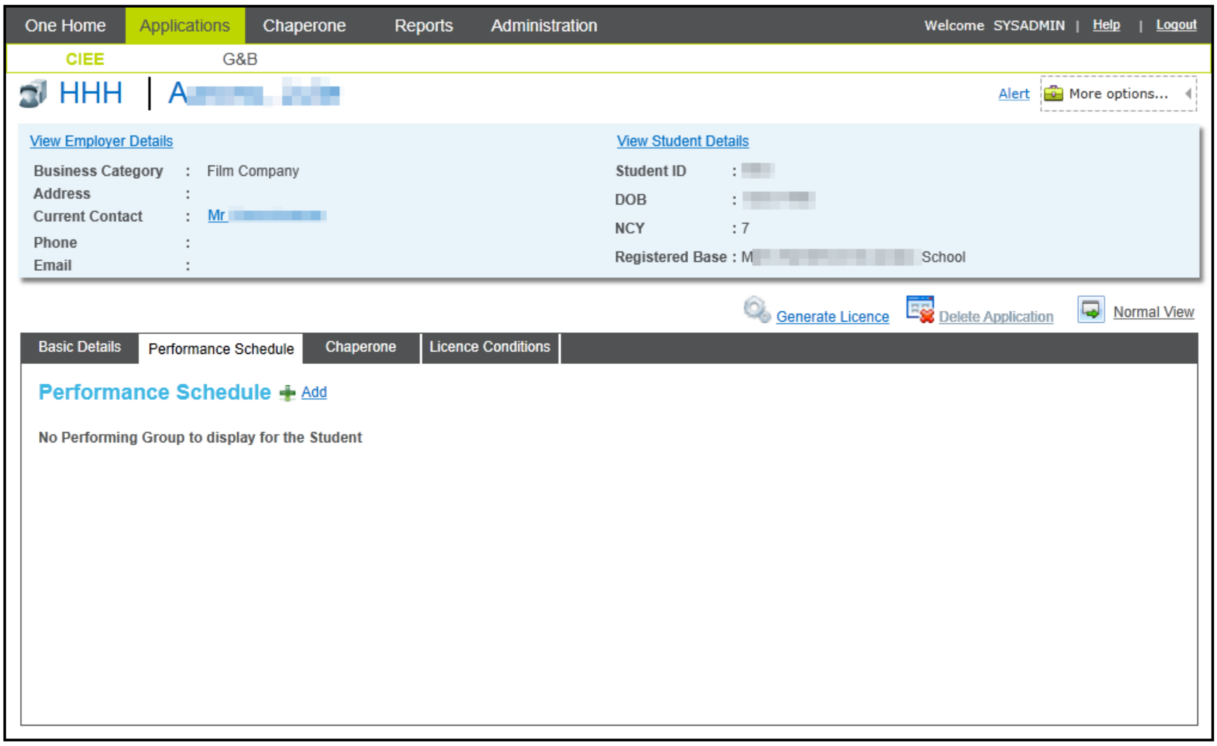
[Adding a Performance and Rehearsal Schedule] *on page 39*

[Associating a Chaperone to an Application] *on page 42*
[Editing Licence Conditions] on page *43*
[Generating and Printing a Performance Licence] *on page 45*

Adding a Performance and Rehearsal Schedule

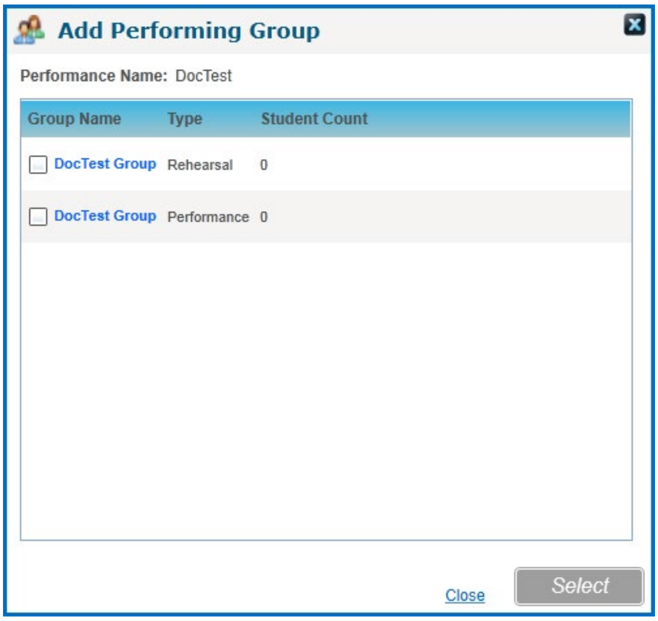
Each performance licence application must have a performance schedule associated with it. Optionally, you can also add a rehearsal schedule.

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Select the **Performance Schedule** tab to display the **Performance Schedule** grid.

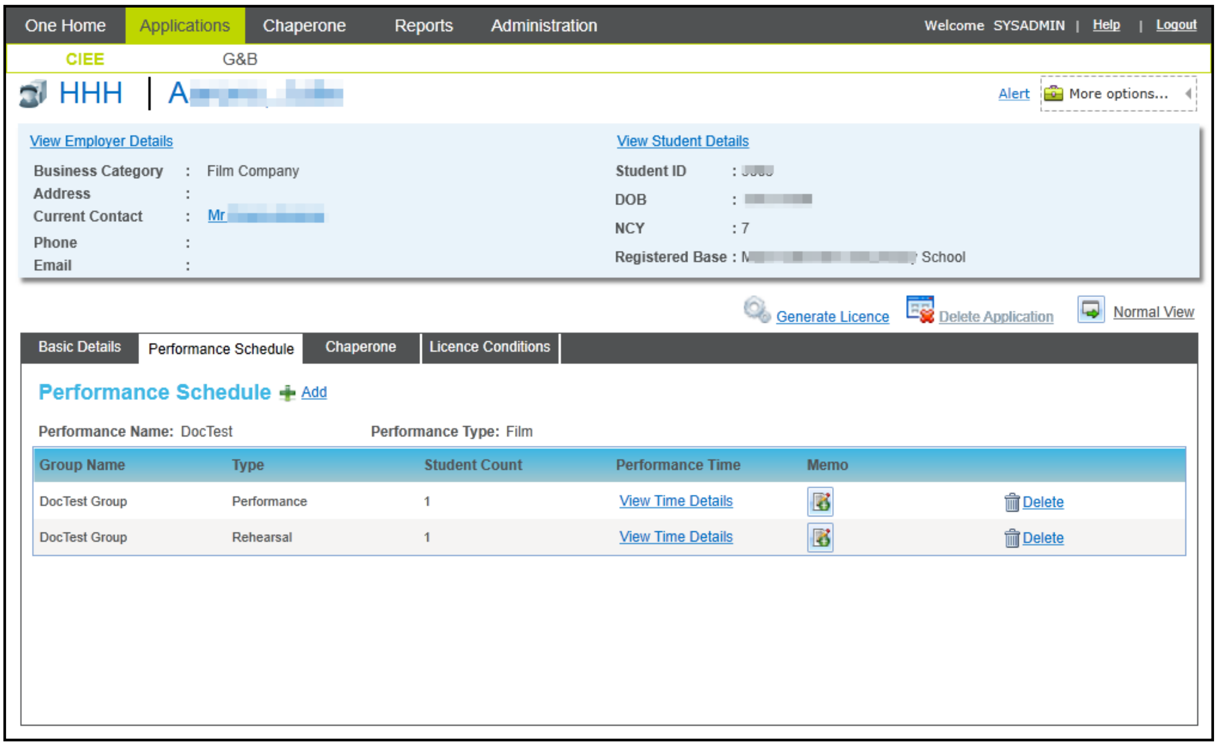


3. Click the **Add** hyperlink to display the **Add Performing Group** dialog.

> ***NOTE:*** *If no performances schedules are available in the* ***Add Performing Group*** *dialog, they must be added in the* ***Performance Schedule*** *tab of the* ***Employer Details*** *page. For more information, see* [*Adding a Performing Group*] *on page* 83*.*

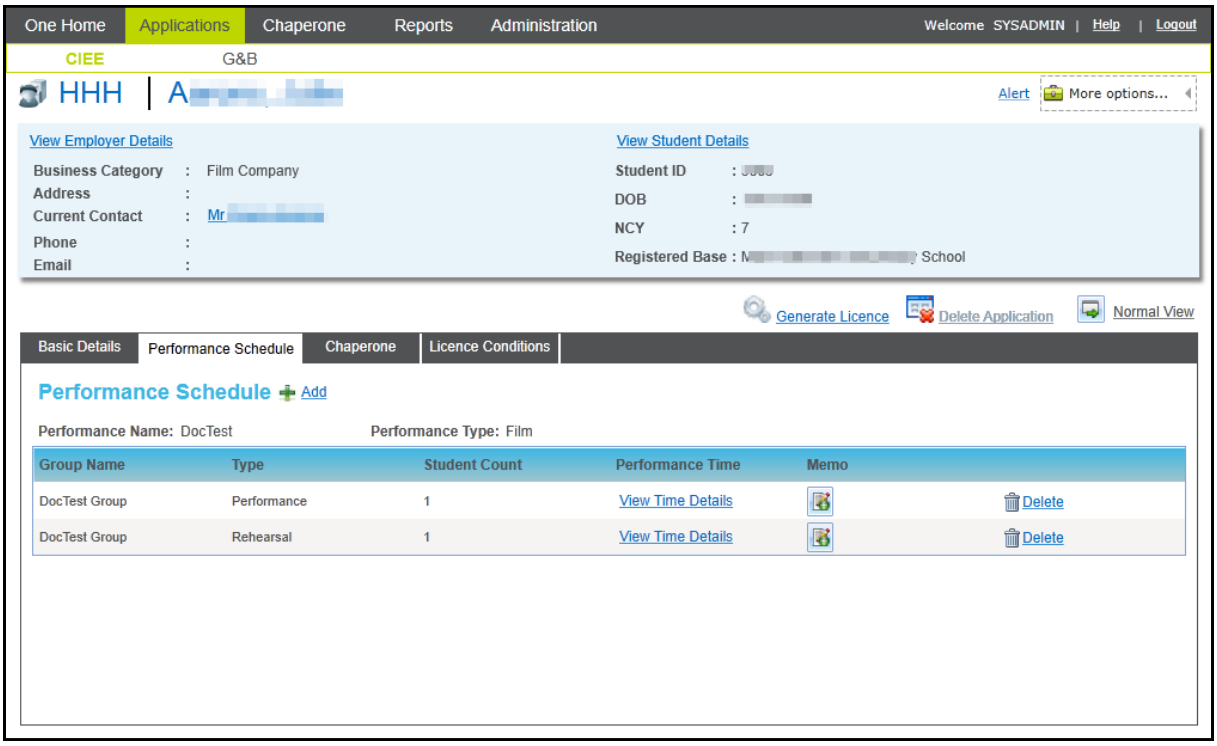


4. Select the required performance schedule.
5. If required, select the required rehearsal schedule.
6. Click the **Select** button to add the selected items to the application.



Deleting a Performance Schedule

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Select the **Performance Schedule** tab to display the **Performance Schedule** grid.



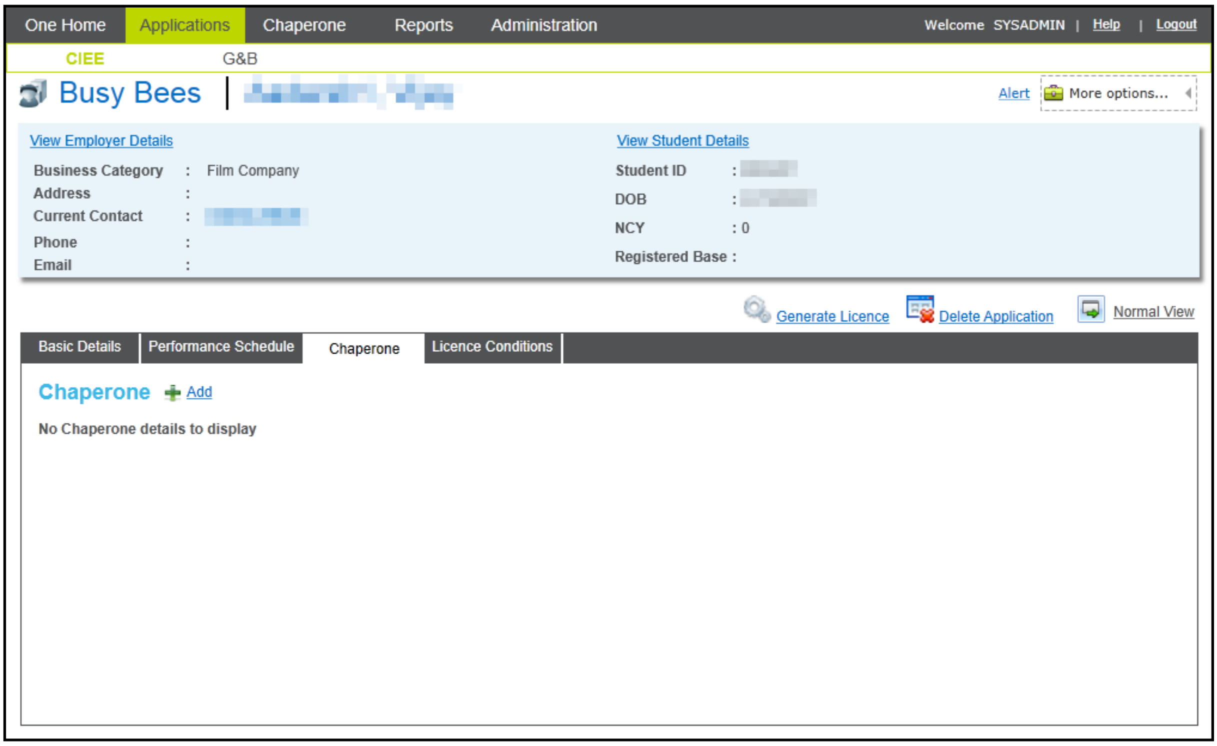
3. For the schedule you wish to delete, click the **Delete** hyperlink to display the **Performing Group** confirmation dialog.
4. Click the **Yes** button to remove the performance schedule from the student's application.

Associating a Chaperone to an Application

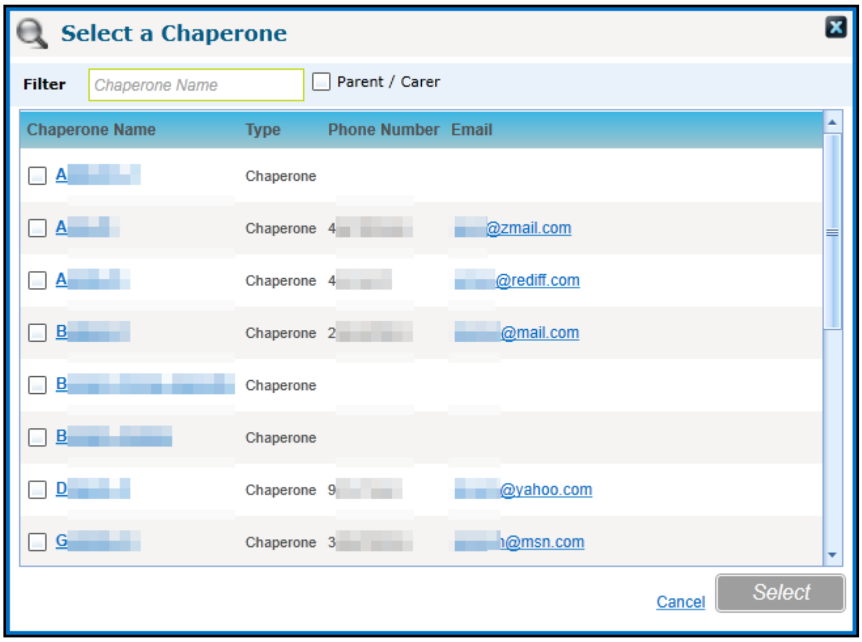
Each application requires at least one chaperone before the licence can be issued.

> ***NOTE:*** *Before a person can be added as a chaperone to an application, they must be registered as a chaperone first. It is recommended that you ensure any chaperones you require for an application are registered in One before you begin creating the application. For more information, see* *Registering a New Chaperone on page* 49.

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Select the **Chaperone** tab to display the **Chaperone** list.



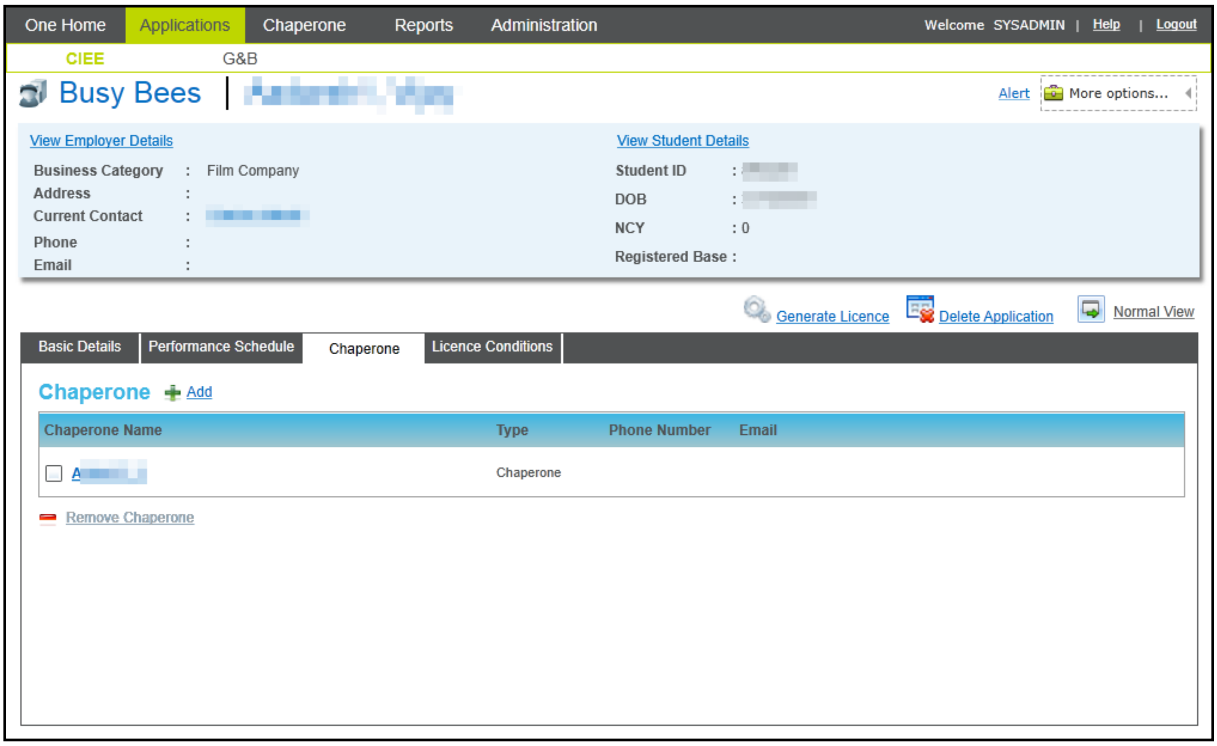
3. Click the **Add** hyperlink to display the **Select a Chaperone** dialog.



4. If necessary, filter the list of available chaperones.

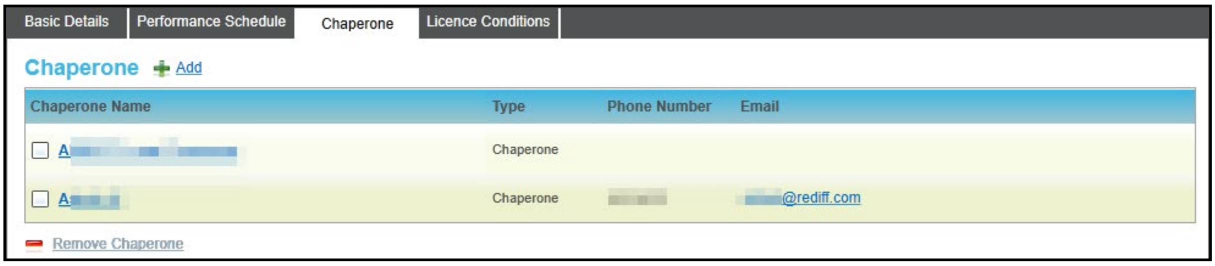
Enter a name in the **Filter** field to find a specific person. Select the **Parent/Carer** check box to limit the results to only parents and carers.

5. Select the check box for each required chaperone.
6. Click the **Select** button to add the selected people to the chaperone list for the application.



Removing a Chaperone from an Application

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Select the **Chaperone** tab to display the **Chaperone** list.

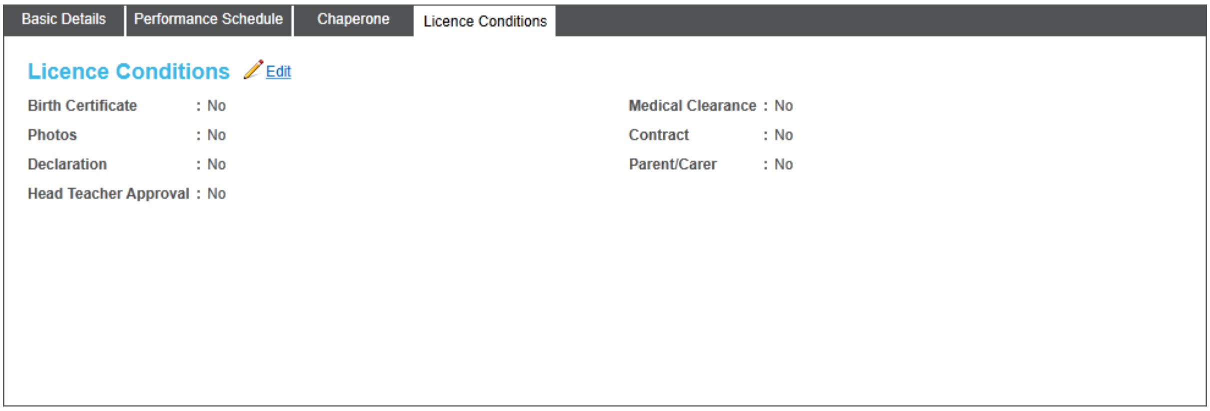


3. Select the check box for the chaperone you wish to remove.
4. Click the **Remove Chaperone** hyperlink to display the **Remove Associated Chaperone** confirmation dialog.
5. Click the **Yes** button to remove the chaperone from the application.

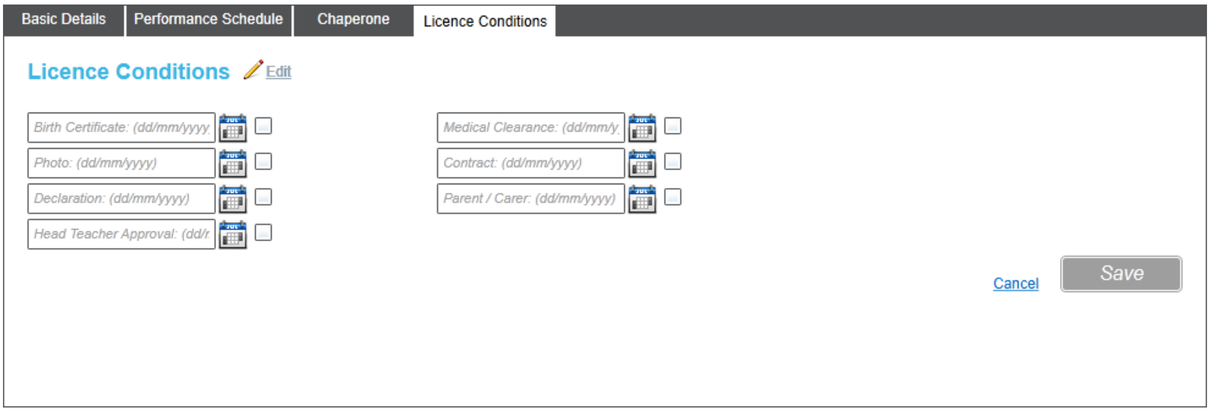
Editing Licence Conditions

The **Licence Conditions** tab records whether specific pieces of information such as birth certificate, contract, or parent approval have been presented to the Local Authority. If the required information or authorisations have not been presented to the LA and recorded in One, the performance licence cannot be created. The required licence condition items can be set by your One administrator.

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Select the **Licence Conditions** tab.

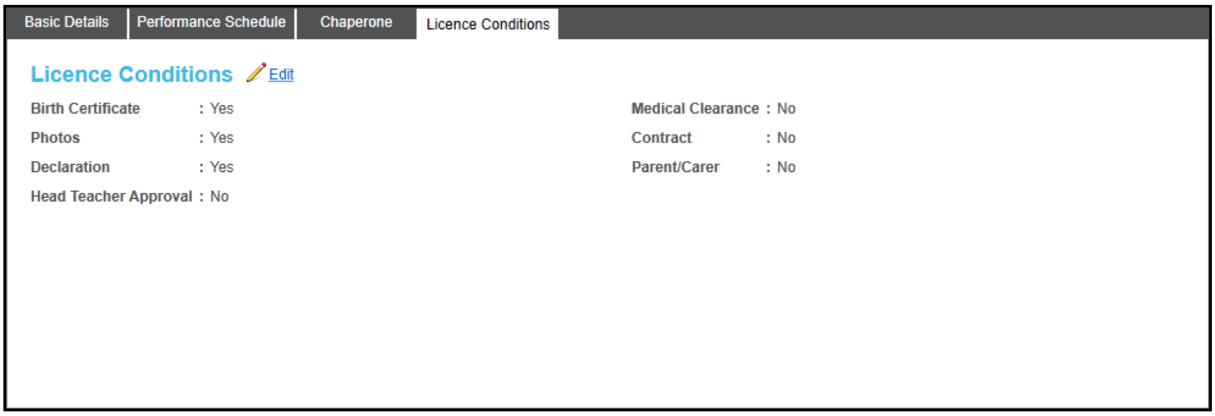


3. Click the **Edit** hyperlink to enable editing.



4. For each piece of information or authorisation, enter the date it was received. The check box is selected automatically when a date is entered.

   If no date is known, select the required check box and leave the date blank.
5. Click the **Save** button to record the information.



More Information:
Editing Entertainment Defaults on page *27*

Editing an Entertainment Application Status

An entertainment application's status can be manually changed to any value except **ISS** – Issued.

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Click the **Edit** hyperlink adjacent to **Application Details** to enable editing.
3. Select the required **Application Status**.

   If the application is approved, select **APP – Approved**. After saving, you can issue the licence.
4. Click the **Save** button.

Generating and Printing a Performance Licence

After an entertainment application is approved, the licence can be issued. Issuing a licence is a two stage process. First you must generate the licence, then you must print it.

You can generate a licence for an individual student via their application or for multiple students via the employer's **Student Performers** tab.

When you generate a licence, One performs the following validations before issuing it:

- Checks the **Individual Licence Report** is selected (this is configured by your system administrator).
- Checks the application status is either **Approved** or **Revised**.
- Checks that at least one chaperone has been added to the application.
- Checks that a performance schedule has been linked to the application.
- Checks whether all the required licence conditions have been met.

More Information:
Generating and Printing a Performance Licence for an Individual Student *on page 45*
Generating and Printing a Performance Licence for Multiple Students *on page 45*

Generating and Printing a Performance Licence for an Individual Student

1. Open the required application. For more information, see Opening an Application on page *93*.
2. Click the **Generate Licence** hyperlink to create the licence and display the **Generate Licence** confirmation dialog.
3. Click the **Yes** button to close the dialog to generate the licence.
4. Click the **Print Licence** hyperlink to print the licence.

   The **Application Status** is now **Issued** and the **Licence Issued On** is populated with the issue date.

Generating and Printing a Performance Licence for Multiple Students

1. Open the employer details for the employer organising the performance for which you wish to issue licences. For more information, Viewing Employer Details on page *67*.
2. Select the **Student Performers** tab to display a list of students with applications associated with the employer.

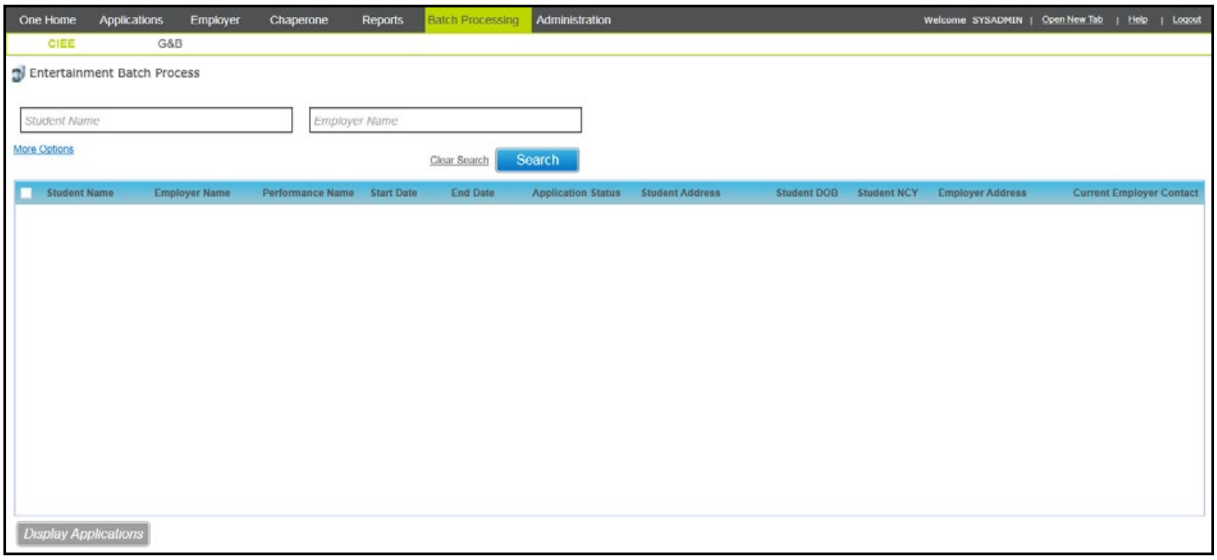
3. Select the check box for each student for whom you wish to issue a licence.
4. Click the **Generate Licence** hyperlink to create the licences for the selected students.
5. Open the required applications individually and click the **Print Licence** hyperlink to print the licences.

Batch Processing

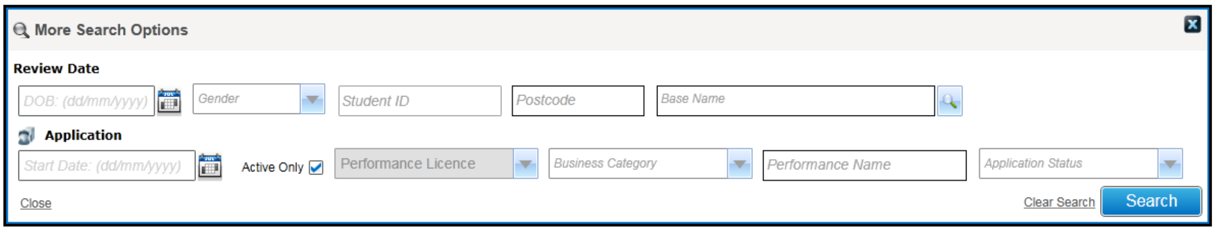
The **Batch Processing** area enables you to update the details of multiple applications at once. For example, if an officer has left, you can search for all applications connected to the officer and assign a new officer to all the affected applications. For more information on updating multiple applications at once, see Updating Multiple Applications via Batch Processing on page *46*.

Updating Multiple Applications via Batch Processing

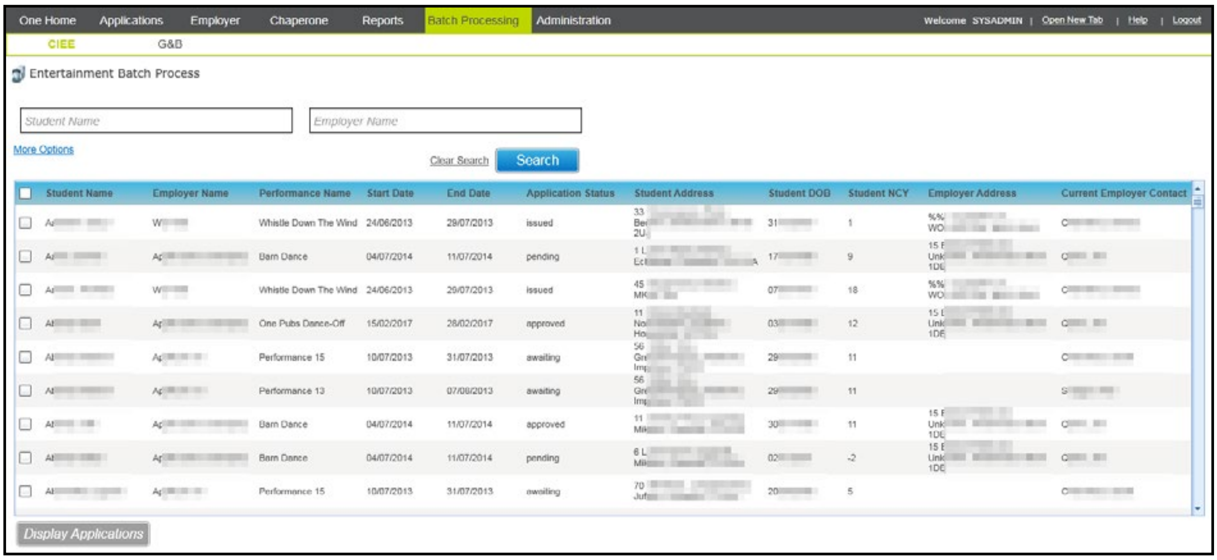
1. From the One homepage, click the **Applications** button to display the **Applications** area.
2. Select the **Batch Processing** area.



3. Ensure the **CIEE** page is selected.
4. Enter the search criteria for the applications you wish to edit.
5. To search using more specific application details, click the **More Options** hyperlink to display the **More Search Options** dialog.



6. Click the **Search** button to display a list of results that match the entered search criteria.

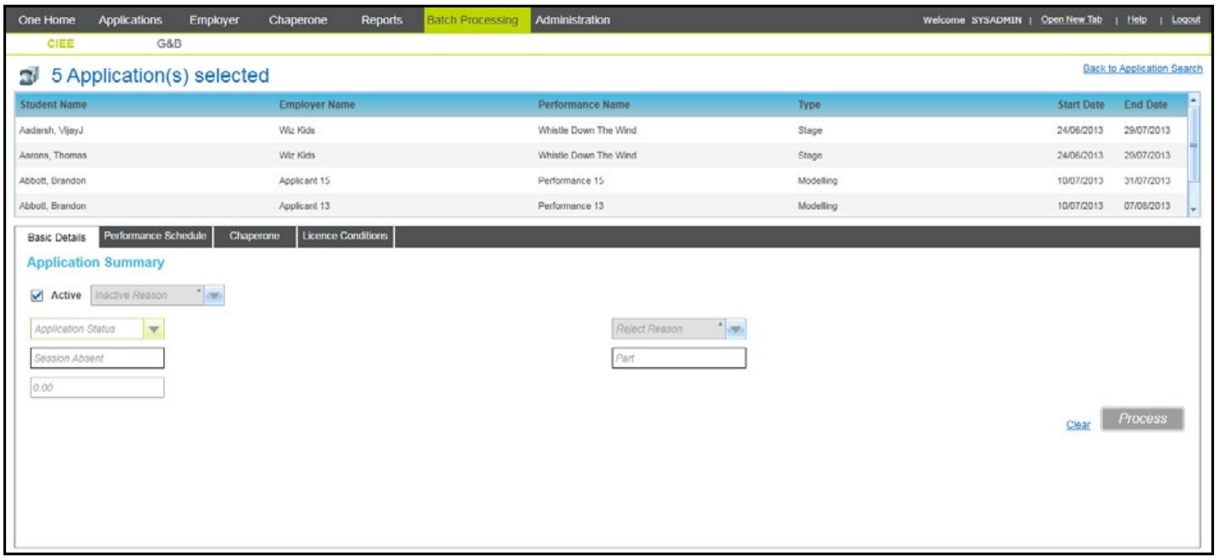


7. Select the check box for each application to which you wish to make the same change, e.g. all the applications for which you want to change the **Application Status**.

> ***TIP:*** *To select all the displayed applications, select the check box in the top-left of the table header, next to the **Student Name** column.*

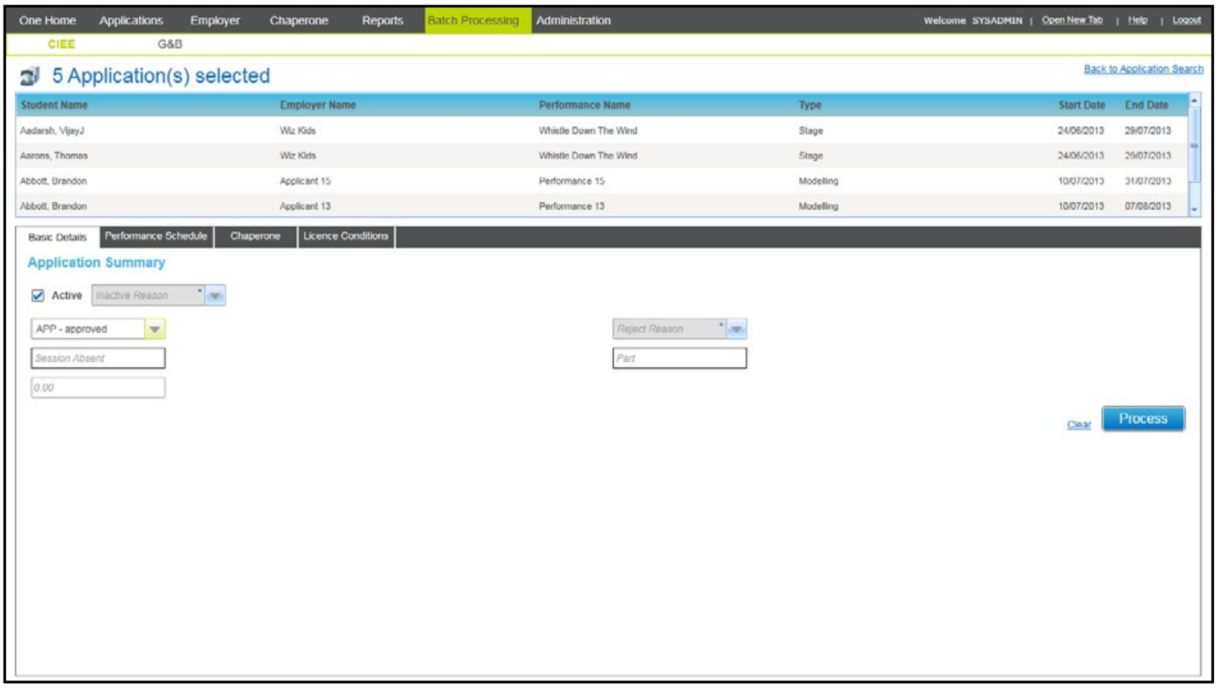
8. Click the **Display Applications** button to display the selected applications in a grid.

> ***IMPORTANT NOTE:*** *Although all selected records will be updated as expected, due to performance issues, only the first 100 selected records are displayed when you click the **Display Applications** button.*



9. Update the information in the tabs as required. The **Performance Schedule** details can be changed only if all the selected applications are part of the same performance.

> ***TIP:*** *If you need to add more records, click the **Back to Application Search** hyperlink to display all the search results.*



10. Click the **Process** button to display a confirmation dialog.
11. Click the **Yes** button to update the records.

06 | Maintaining Chaperones

Introduction

All applications for an entertainment licence must have at least one chaperone assigned. In order to add a person as a chaperone in Children in Entertainment, they must be added as a chaperone to One. This process is called registration. Once a person is registered, they can be assigned to entertainment applications and licences can be generated and printed to verify they are the assigned chaperone.

The **Chaperone** area is used to record and maintain all details relating to chaperones, including personal information, police checks, interviews and references. Chaperone licences for specific performances and students are also generated from this area.

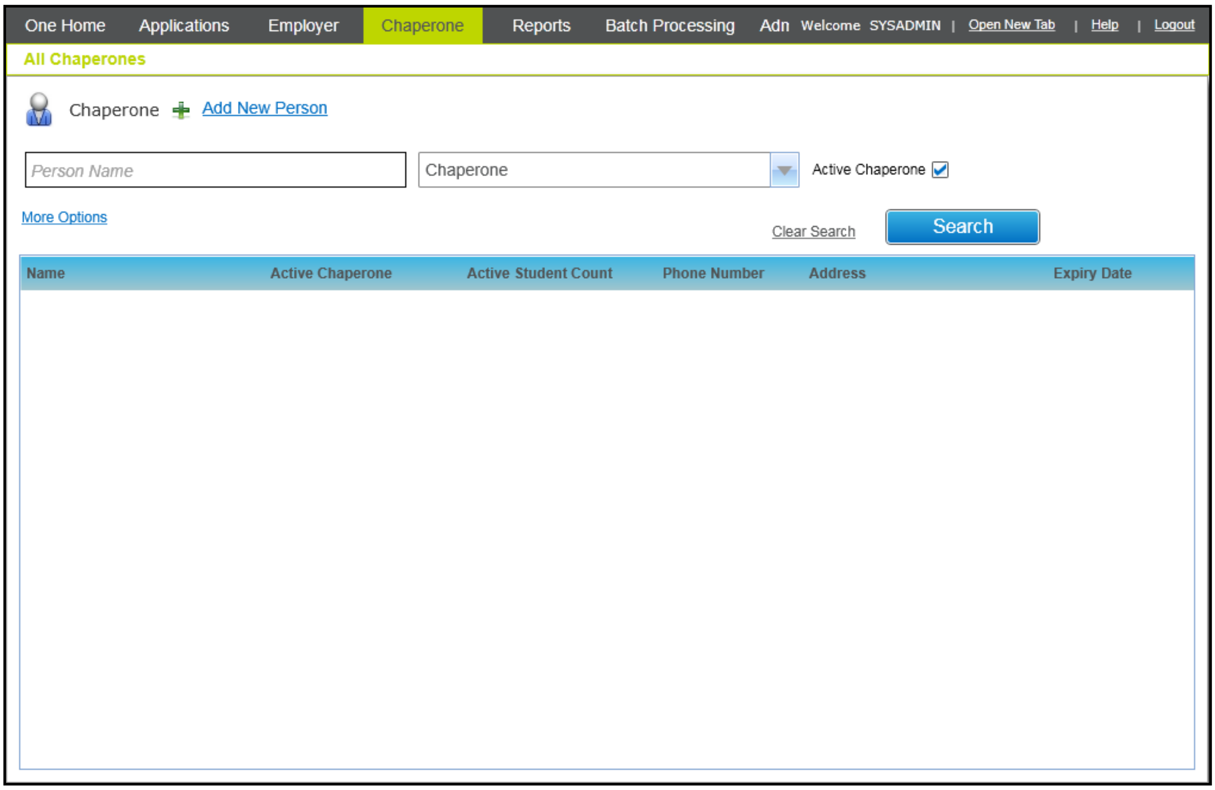
Registering a New Chaperone

Users with the appropriate permissions can register (add) the details of a new chaperone. You can designate a person already in One or add a new person and register them as a chaperone.

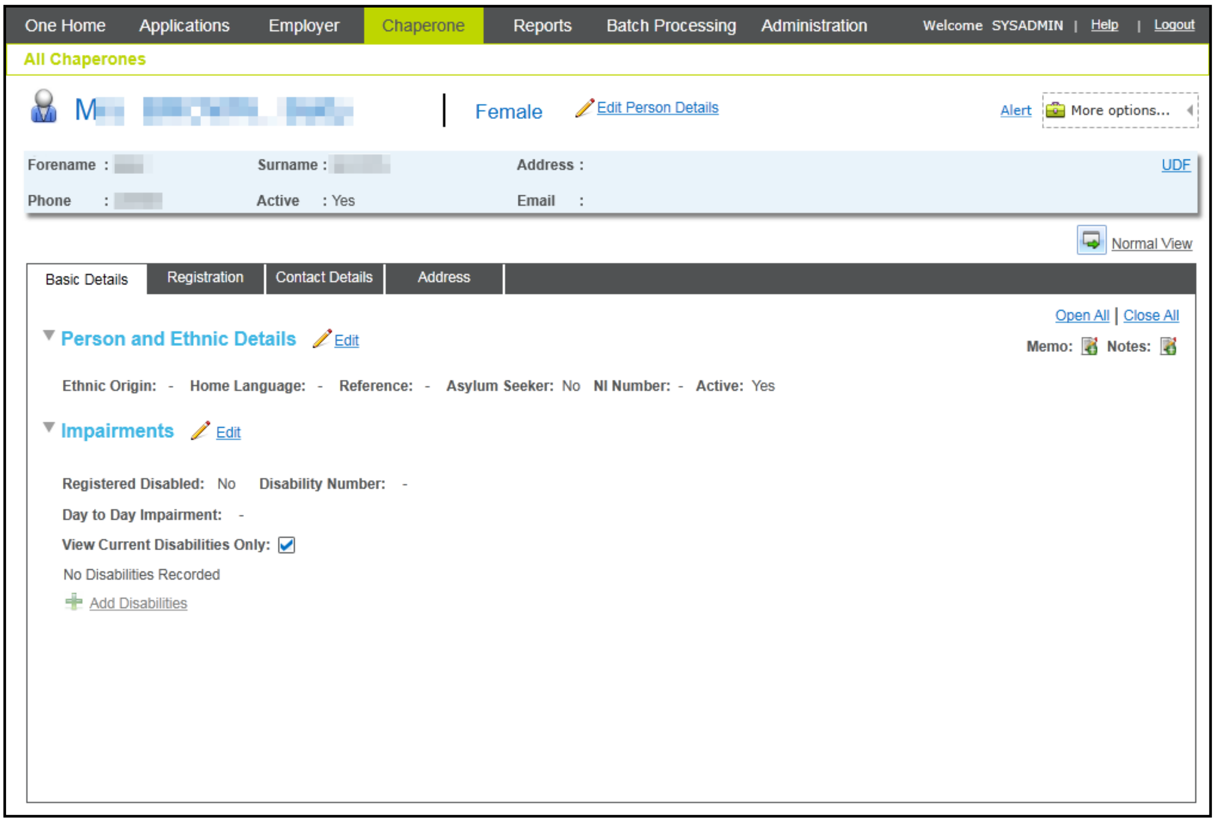
The following process assumes that the person you are adding as a chaperone has not completed all the required interviews and background checks and still needs to present required documentation. Therefore, the following process will create a chaperone that is inactive, i.e. they cannot be added as a chaperone to an entertainment licence. Once the registration is complete and approved, you must make the chaperone active before they can be added to an application. For more information, see Making a Chaperone Active on page *61*.

After initially creating a basic chaperon application, you can then add interview details, referee details and police check details before assigning the chaperone to a student and generating a licence.

1. From the One homepage, click the **Applications** button to display the **Applications** area.
2. Select the **Chaperone** area to display the chaperone search.



3. To select a person already recorded in the One:
   a. Select **Person** from the **Person Type** drop-down.
   b. Enter part or all of the **Person Name**.
   c. Click the **Search** button to display a list of people who match the entered search criteria.
   d. Click the required person's name to display their **Basic Details**. Skip to step 5.
4. If the person does not already exist in One, you must add them first:
   a. Click the **Add New Person** hyperlink to display the **Add New Person** dialog.
   b. Enter the person's details.
   c. Click the **Save** button to add the person to One and display their **Basic Details**.



5. Select the **Registration** tab.

6. Click the **Edit** hyperlink to enable editing.

7. Select the appropriate **Chaperone status**.
8. Enter any optional details.

> ***NOTE:*** *Although the **Previous forename**, **Previous surname** and **Place of birth** fields are optional, you should record this information to help when performing background checks.*

9. If the applicant has not completed all the required interviews, background and document checks, deselect the **Active** check box to display the **Inactive date** field and **Inactive Reason** drop-down list.
10. Enter an **Inactive Date** and select an **Inactive Reason**.
11. Click the **Save** button to record the details and create a basic chaperone licence application.

    You can now perform the required checks and interviews, and record the details in the application before assigning the chaperone to performances and generating licences.

More Information:

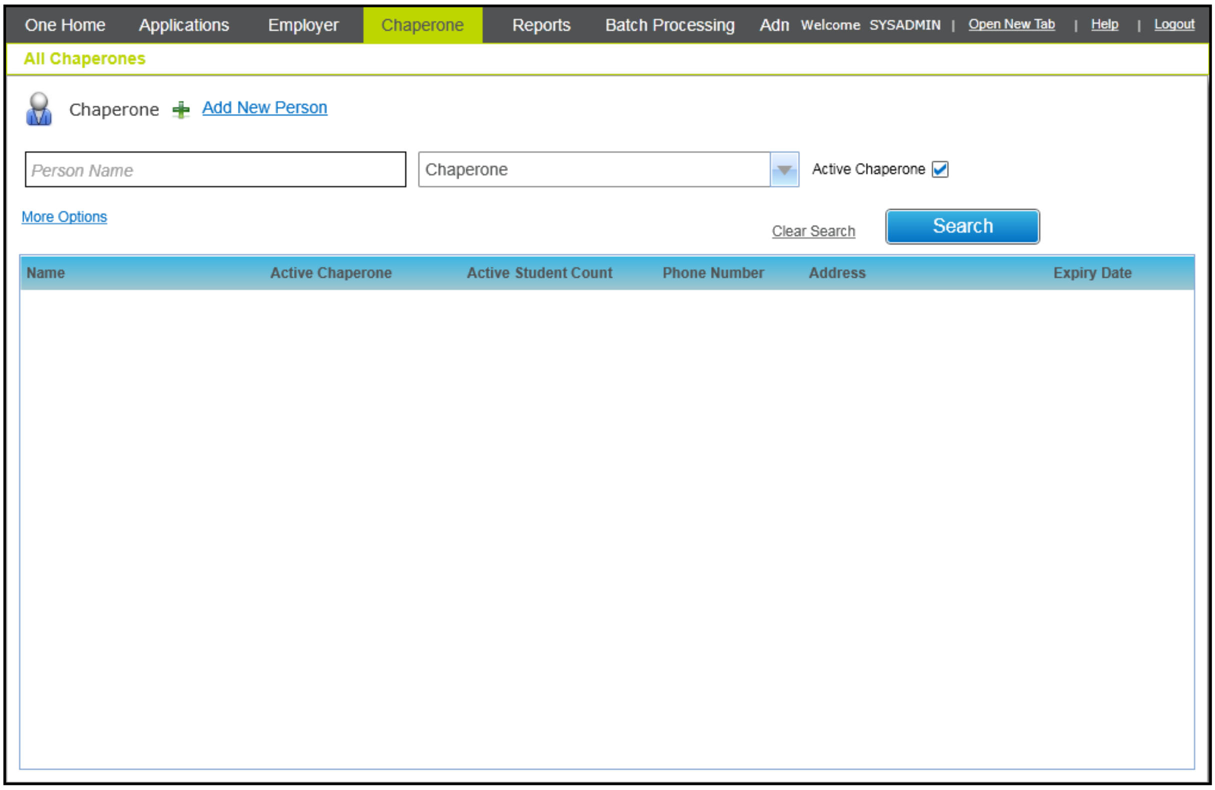
Recording Check Details on page *54*
Recording Interview Details on page *55*
Recording Referee Details on page *57*
Creating a Chaperone Licence on page *59*
Generating and Printing a Chaperone Licence on page *59*
Making a Chaperone Active on page *61*

Adding Additional Chaperone Details

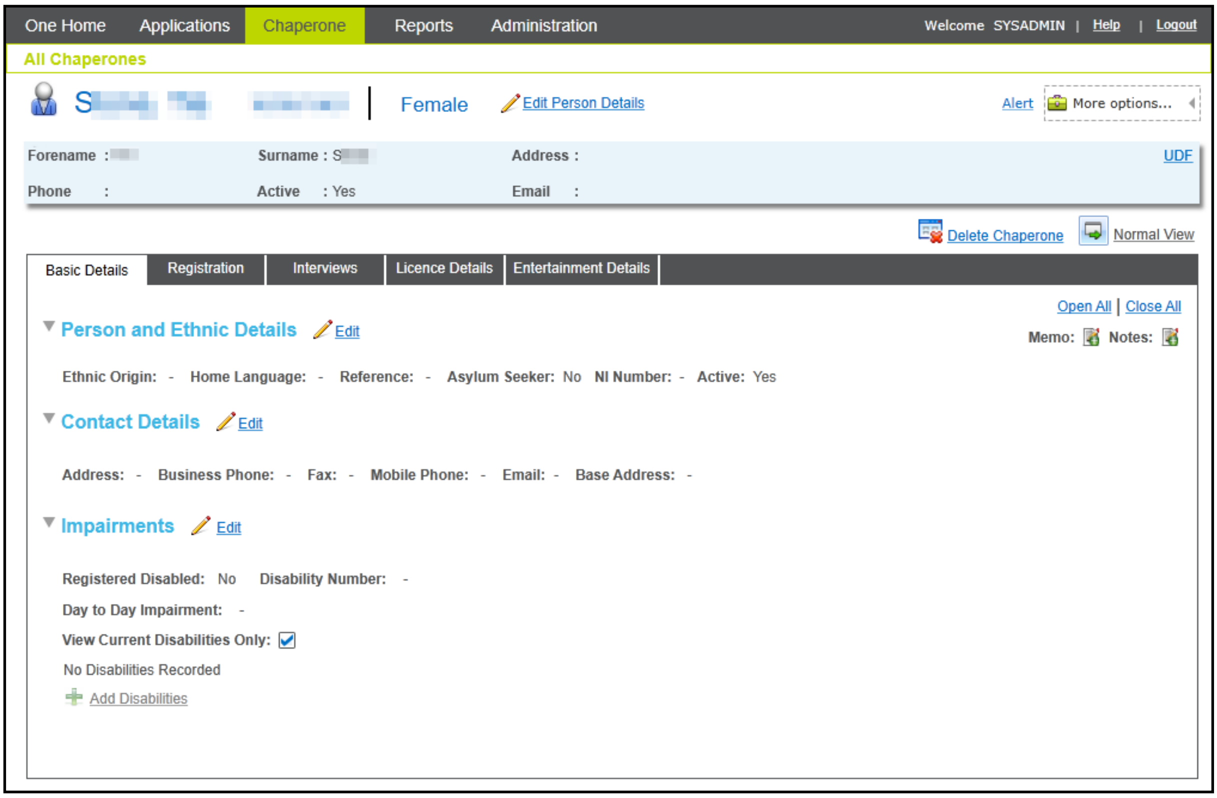
The One Applications functionality tracks a wide range of chaperone related information, including records of checks made on the chaperone, interviews with the chaperone and licence details.

Opening an Existing Chaperone Record

1. From the **Applications** area, click the **Chaperone** hyperlink to display the **All Chaperones** page.

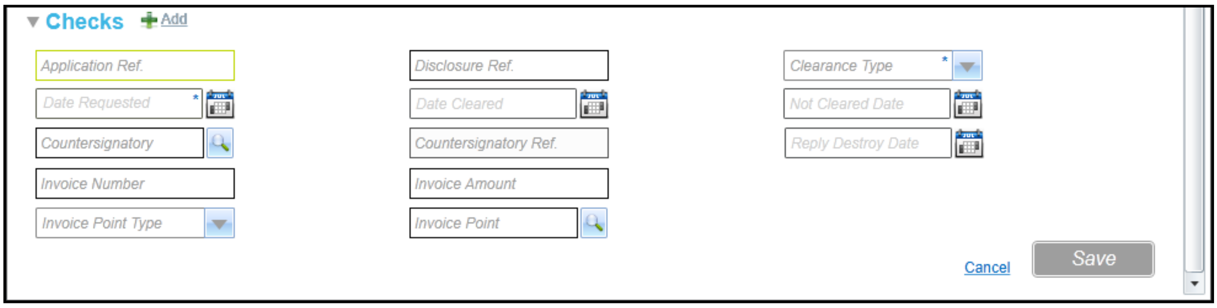


2. Enter your search criteria. Click the **More Options** hyperlink to display additional search options.
3. Click the **Search** button to display a list of people who meet the entered search criteria.
4. Click the name of the person whose record you wish to amend to display their details.

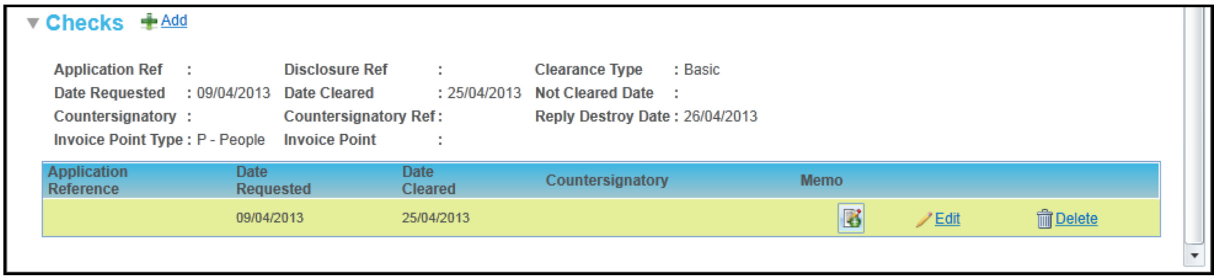


Recording Check Details

1. Open the required record. For more information, see Opening an Existing Chaperone Record on page *53*.
2. Select the **Registration** tab.
3. Click the **Add** hyperlink in the **Checks** section to display editable fields relating to check details.



4. Select a **Clearance Type** and a **Date Requested**.
5. Enter any other optional information.
6. Click the **Save** button.



Editing Check Details

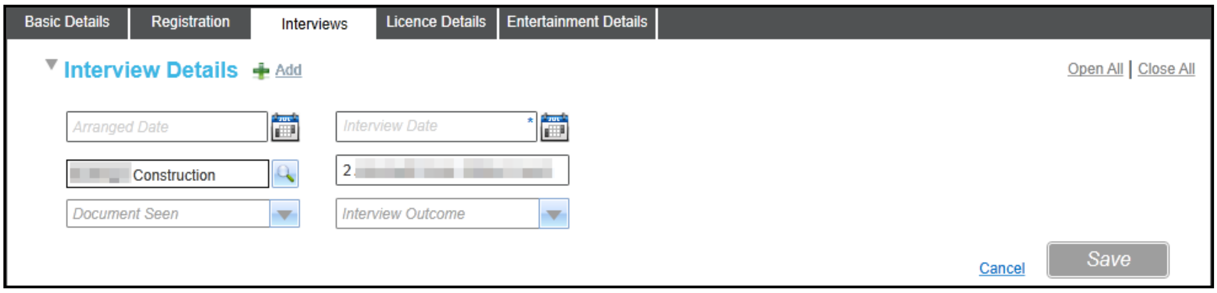
1. Open the required application. For more information, see Opening an Existing Chaperone Record on page *53*.
2. Select the **Registration** tab.
3. For the check you wish to edit, click the **Edit** hyperlink to enable editing.
4. Make the required changes to the check details.
5. Click the **Save** button.

Deleting Check Details

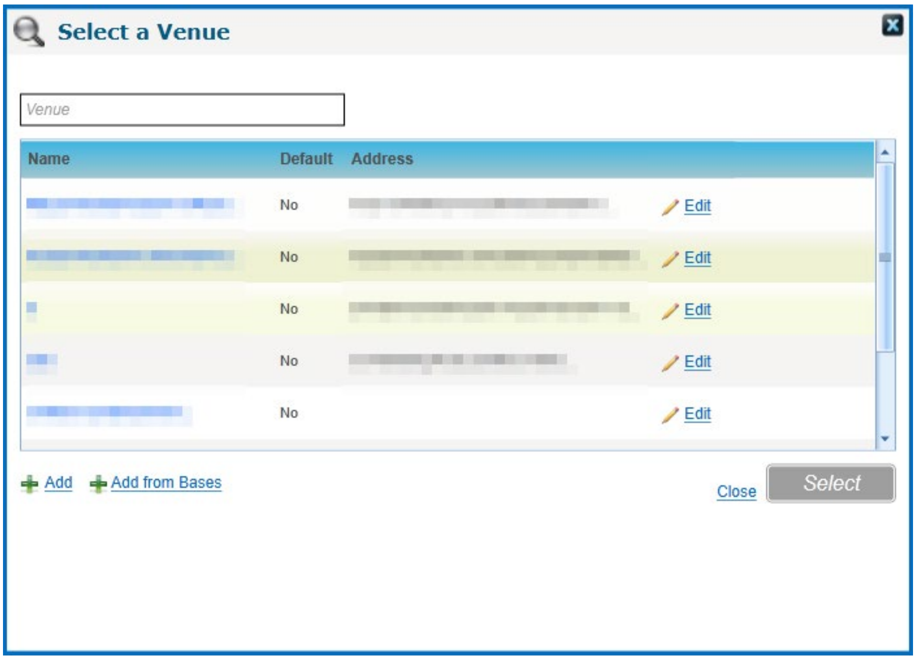
1. Open the required application. For more information, see Opening an Existing Chaperone Record on page *53*.
2. Select the **Registration** tab.
3. For the check you wish to delete, click the **Delete** hyperlink to display the **Delete Chaperone Check** dialog.
4. Click the **Yes** button to delete the check.

Recording Interview Details

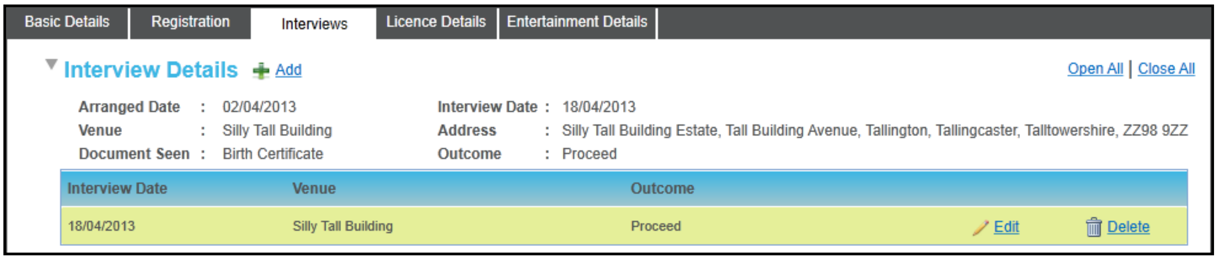
1. Open the required application. For more information, see see Opening an Existing Chaperone Record on page *53*.
2. Select the **Interviews** tab to display the **Interview Details** section.
3. In the **Interview Details** section, click the **Add** button to display editable fields relating to interview details.



4. If a different venue is required, click the **Interview Venue** browse button to display the **Select a Venue** browser.



5. Highlight the required venue then click the **Select** button to update the venue in the application.
6. Select an **Interview Date**.
7. Enter any other optional information.
8. Click the **Save** button.



Editing Interview Details

1. Open the required application. For more information, see Opening an Existing Chaperone Record on page *53*.
2. Select the **Interviews** tab to display the **Interview Details** section.
3. Click the **Edit** hyperlink for the interview you wish to edit.
4. Make the required changes to the interview details.
5. Click the **Save** button.

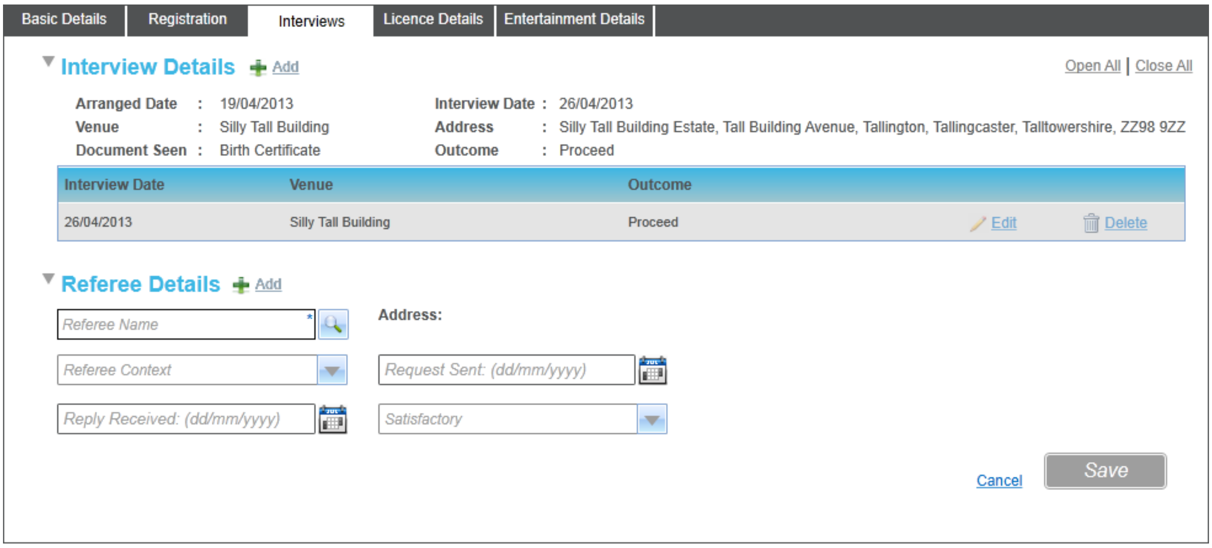
Deleting an Interview Record

1. Open the required application. For more information, see Opening an Existing Chaperone Record on page *53*.
2. Click the **Interviews** tab to display the **Interview Details** section.
3. Click the **Delete** hyperlink for the interview you wish to remove to display the **Delete Chaperon Interview** dialog.
4. Click the **Yes** button to delete the interview record.

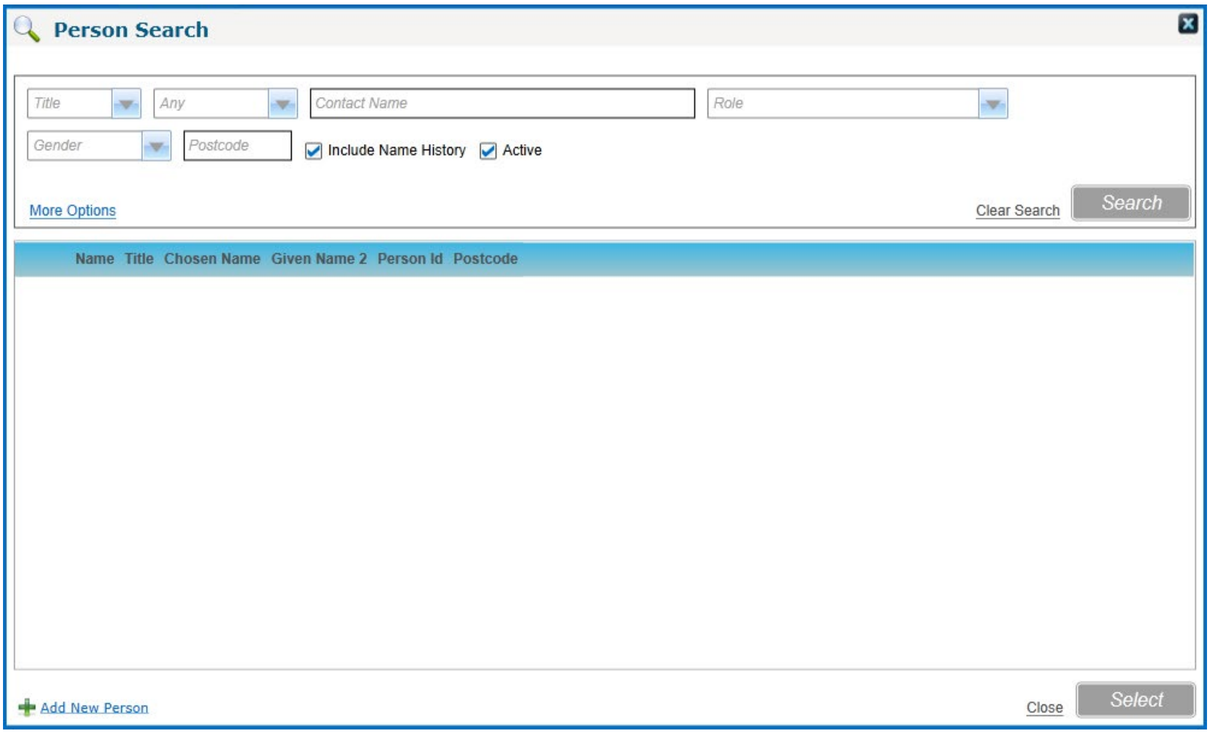
Recording Referee Details

You can record the details of referees for the chaperone. To record a referee against a chaperone application, the referee must also be recorded in One.

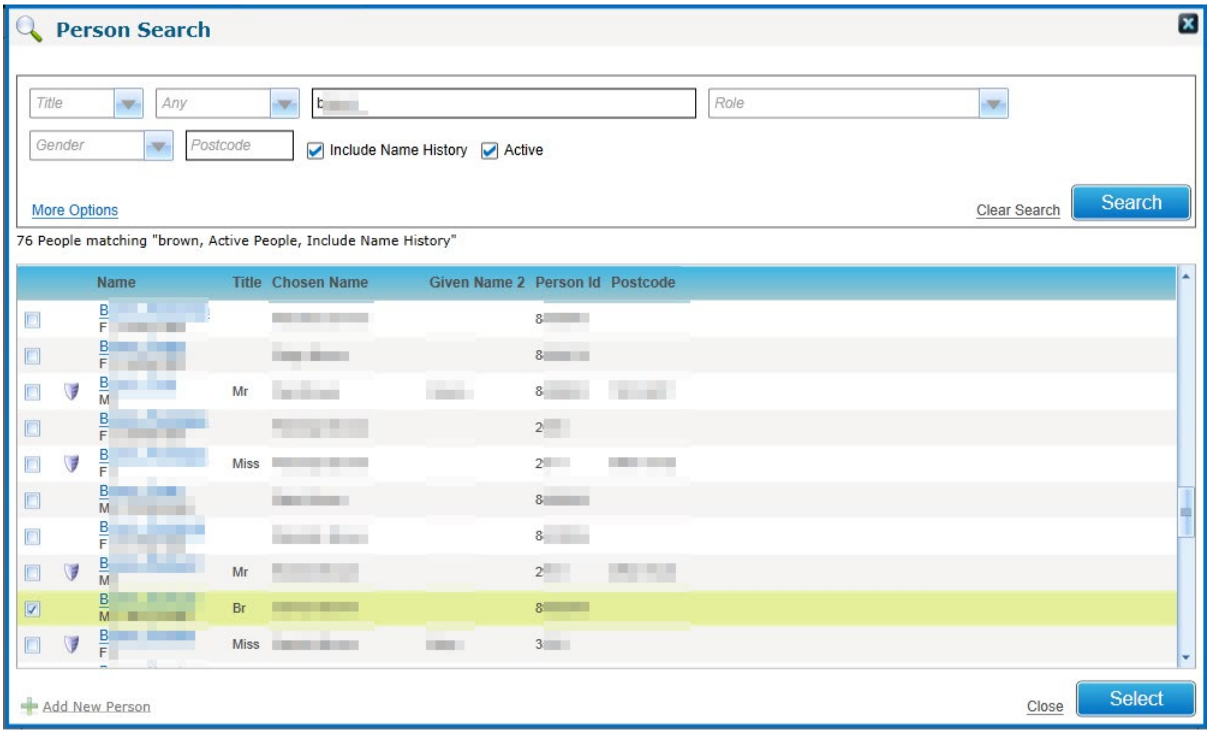
1. Open the required application. For more information, see see Opening an Existing Chaperone Record on page *53*.
2. Select the **Interviews** tab.
3. Click the **Add** button in the **Referee Details** section to display editable fields relating to referee details.



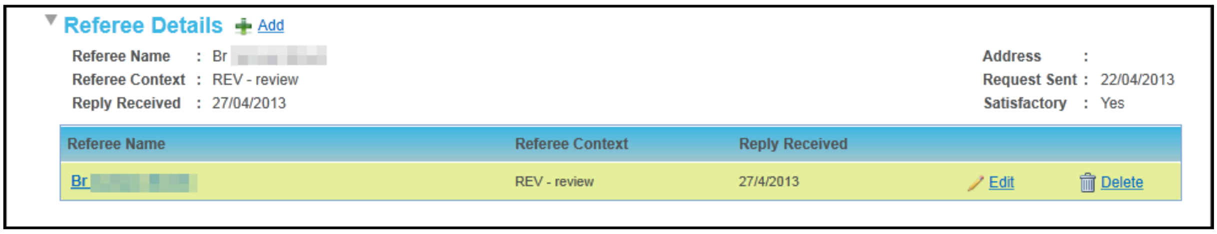
4. Click the **Referee Name** browse button to display the **Person Search** browser.



5. Enter the required search criteria then click the **Search** button to display a list of people who meet the entered search criteria.



6. Select the check box adjacent to the name of the person you wish to add as a referee.
7. Click the **Select** button to add the person and return to the **Referee Details** section.
8. Enter any other details.
9. Click the **Save** button.



Editing Referee Details

1. Open the required application. For more information, see see Opening an Existing Chaperone Record on page *53*.
2. Select the **Interviews** tab.
3. In the **Referee Details** section, click the **Edit** hyperlink for the referee you wish to edit.
4. Make the required changes.
5. Click the **Save** button.

Deleting a Referee

1. Open the required application. For more information, see Opening an Existing Chaperone Record on page *53*.
2. Select the **Interviews** tab.
3. In the **Referee Details** section, click the **Delete** hyperlink for the referee you wish to remove to display the **Delete Chaperone Referee** dialog.

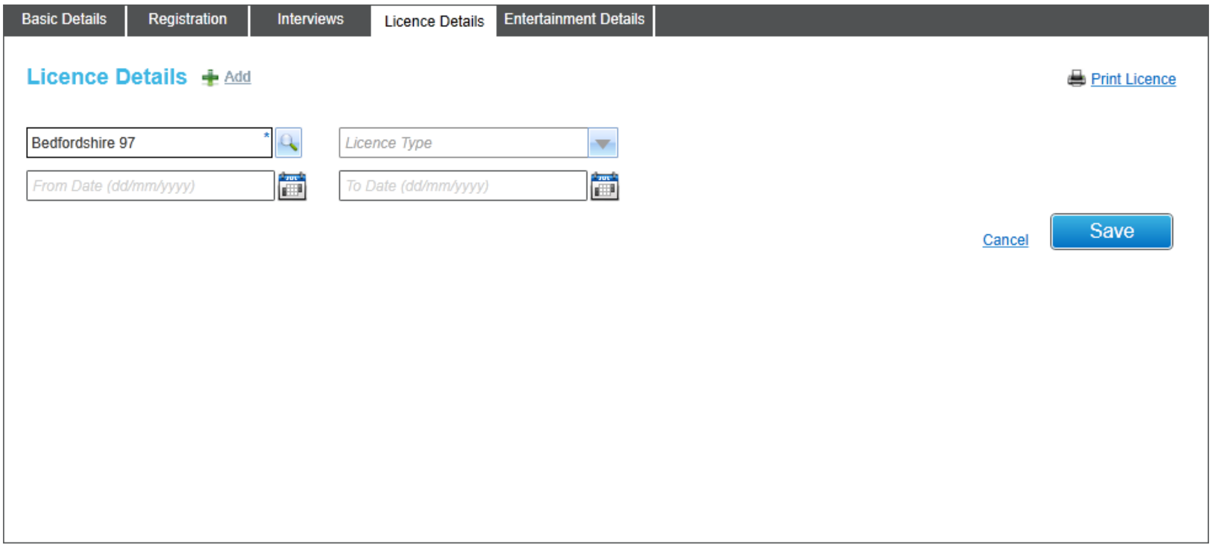
4. Click the **Yes** button to delete the interview record.

Creating a Chaperone Licence

Before you can generate and print a chaperone licence, you must first add licence details in the **Licence Details** tab of the chaperone record.

After adding licence details you should generate and print the chaperone licence.

1. Open the required application. For more information, see [Opening an Existing Chaperone Record] on page *53*.
2. Select the **Licence Details** tab to display a list of licences for the chaperone.
3. Click the **Add** hyperlink to display editable fields relating to licence details.



The LA defaults to the default for the One environment.

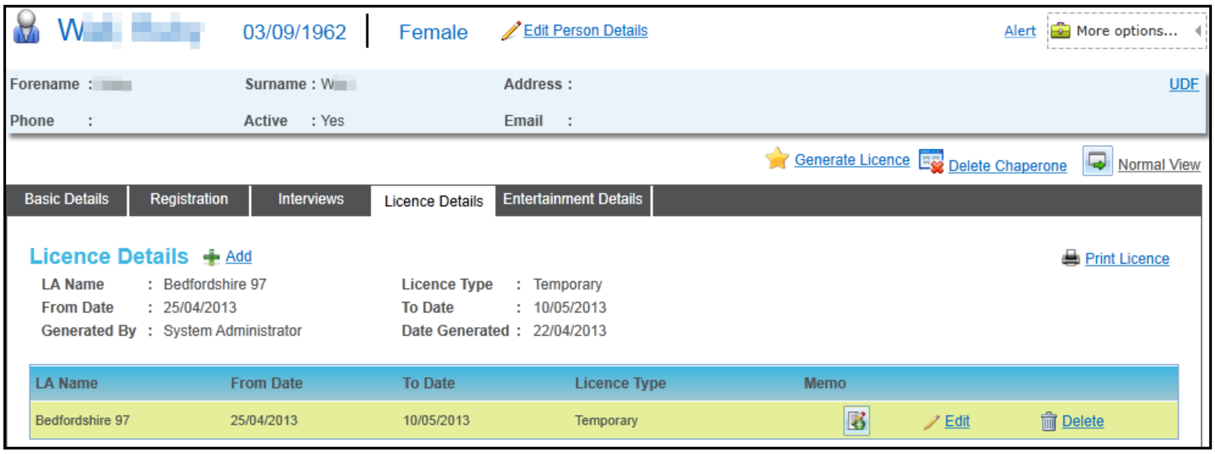
4. If you need to change the Local Authority, click the **LA name** browse button to display the **LA** browser.
5. Highlight the required LA then click the **Select** button to add it to the chaperone record.
6. Select the **Licence Type**, **From Date** and **To Date** as required.

> ***NOTE:*** *The options in the* ***Licence Type*** *drop-down can be edited in the v4 Client via* ***Tools | Lookups*** *(Table ID: 1214).*

7. Click the **Save** button to record the licence details and add them to the list of licences.
8. You should now generate and print the licence. For more information, see [Generating and Printing a Chaperone Licence] on page *59*.

Generating and Printing a Chaperone Licence

1. Open the required record. For more information, see [Opening an Existing Chaperone Record] on page *53*.
2. Select the **Licence Details** tab.



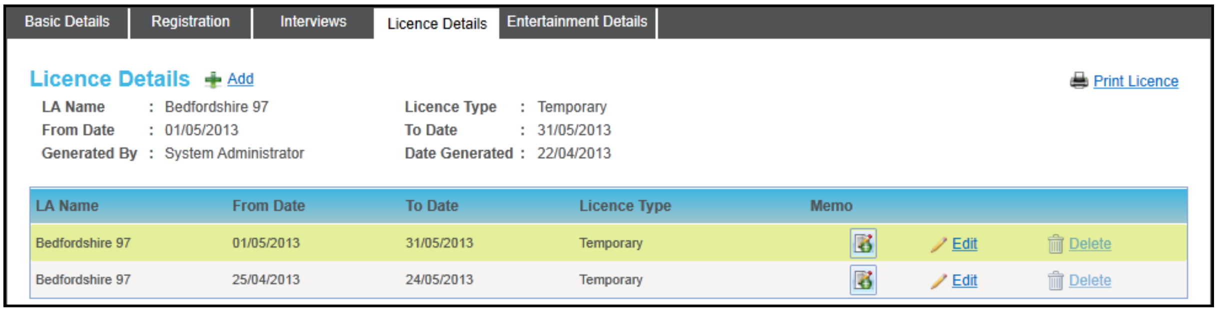
3. Highlight the record for which you wish to generate the licence, then click the **Generate Licence** hyperlink to display the **Generate Licence** confirmation dialog.

NOTE: *After generating the licence, you cannot delete a licence from the* ***Licence Details*** *list.*

4. Click the **OK** button to close the confirmation dialog.
5. Ensure the correct licence is still selected then click the **Print Licence** hyperlink to print it.

Editing a Chaperone Licence

1. Open the required record. For more information, see Opening an Existing Chaperone Record on page *53*.
2. Select the **Licence Details** tab.



3. For the licence you wish to update, click the **Edit** hyperlink.
4. Make the required changes.
5. Click the **Save** button.

Deleting a Chaperone Licence

If you have created a licence application in the **Licence Details** list but have not yet generated the licence, it can be deleted.

1. Open the required record. For more information, see Opening an Existing Chaperone Record on page *53*.
2. Select the **Licence Details** tab.

3. For the licence you wish to remove, click the **Delete** hyperlink to display the **Delete Chaperon Licence** confirmation dialog.
4. Click the **Yes** button to delete the licence.

Chaperone Active Status

Only chaperones with an **Active** status can be associated with entertainment licences. If you cannot add a chaperone to an application, ensure that they have an **Active** status. For more information on making a chaperone active, see Making a Chaperone Active on page *61*.

You can make a chaperone inactive if you wish to temporarily prevent them from being associated with student performance licences. You may want to make a chaperone inactive if they have not attended a required interview or presented a required check. Making a chaperone inactive does not delete the person or their chaperone related information from One. For more information, see Making a Chaperone Inactive on page *61*.

Finally, you can delete a chaperone from One. This does not remove the person completely from the database, but instead deletes all the chaperone related information from the database, such as the record of checks and interviews completed during the chaperone registration process. For more information, see Deleting a Chaperone on page *62.*

Making a Chaperone Inactive

1. Open the required chaperone record. For more information, see Opening an Existing Chaperone Record on page *53*.
2. Select the **Registration** tab.
3. In the **Application Summary** section, click the **Edit** button to enable editing.
4. Deselect the **Active** check box to display the **Inactive date** and **Inactive Reason** drop-down lists.
5. Select an **Inactive date** and **Inactive Reason**.
6. Click the **Save** button to make the chaperone inactive.

Making a Chaperone Active

1. Open the required chaperone record. For more information, see see Opening an Existing Chaperone Record on page *53*.
2. Select the **Registration** tab.
3. In the **Application Summary** section, click the **Edit** button to enable editing.
4. Select the **Active** check box.
5. Click the **Save** button to make the chaperone active.

Deleting a Chaperone

Before deleting a chaperone, you must ensure that they are not currently associated with any entertainment applications. If they are associated with existing applications, you must remove them from the applications before deleting their chaperone information. You can view the applications to which they have been assigned in the **Entertainment Details** tab. For more information, see Viewing Entertainment Details on page *62*.

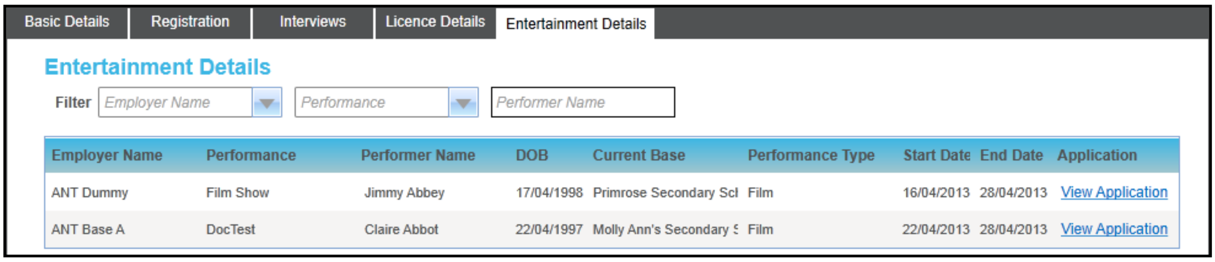
> ***IMPORTANT NOTE:*** *This process should be completed only if the person will never be a chaperone again. If you would like to prevent the person from being assigned as a chaperone temporarily, you can make their chaperone status inactive. For more information, see Making a Chaperone Inactive on page* 61.

1. Open the required application. For more information, see Opening an Existing Chaperone Record on page *53*.
2. Click the **Delete Chaperone** hyperlink to display the **Delete Chaperone** dialog.
3. Click the **Yes** button to display the **Delete Chaperone** confirmation dialog.
4. Click the **OK** button to complete deletion of chaperone information.

Viewing Entertainment Details

You can view all the entertainment applications to which a chaperone is already attached via the **Entertainment Details** tab.

1. Open the required chaperone record. For more information, see see Opening an Existing Chaperone Record on page *53*.
2. Select the **Entertainment Details** tab to display a list of all the entertainment applications with which the chaperone is associated.



3. If necessary, use the filters to limit the number of applications displayed.
4. To view additional information about a specific entertainment application, click the **View Application** hyperlink.

07 | Maintaining Employer Details

Introduction

Users with the appropriate permissions can view and edit employer details. Some employer detail tabs are specific to either employment or entertainment, but others are common to both.

- Common tabs
  - Contact Person
  - Inspection
- Employment specific tabs
  - Student Employees
  - Entertainment specific tabs
- Performances
  - Student Performers
  - Performance Schedule

A new employer can be added via the **Employer** area or by clicking the **Add New Employer** or **Add New Employer from Bases** hyperlinks when creating a new application. You can view and edit employer details via the **Employer** area, or via the **View Employer Details** hyperlink in a completed application.

Creating a New Employer

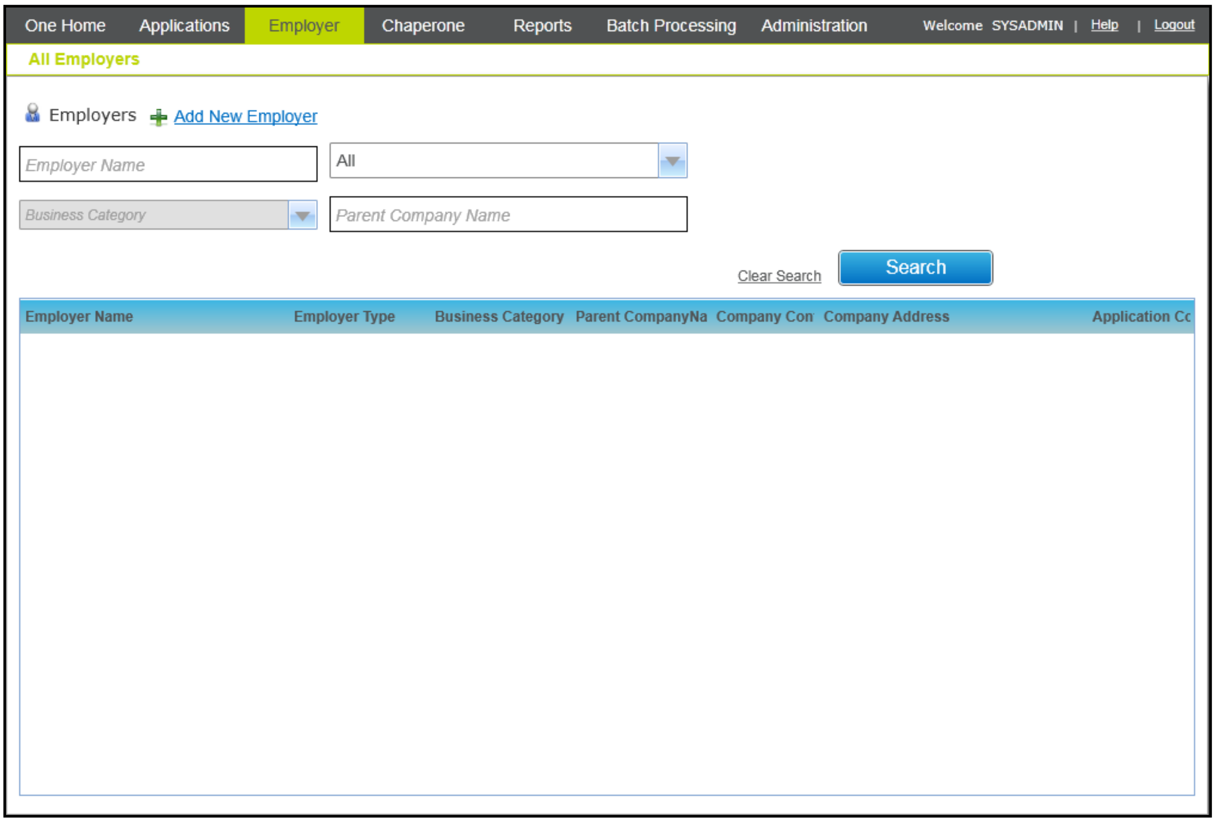
A new employer can be added via the **Employer** area or by clicking the **Add New Employer** or **Add New Employer from Bases** hyperlinks when creating a new application.

More Information:
Creating a New Employer via the Employer Area on page *63*
Creating a New Employer via the Add New Employer Hyperlink on page *65*
Creating a New Employer via the Add new Employer from Bases Hyperlink on page *66*

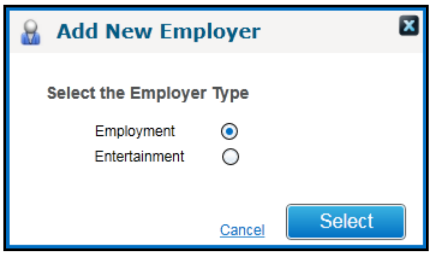
Creating a New Employer via the Employer Area

Users with the appropriate permissions can add the details of an employer via the **Employer** area.

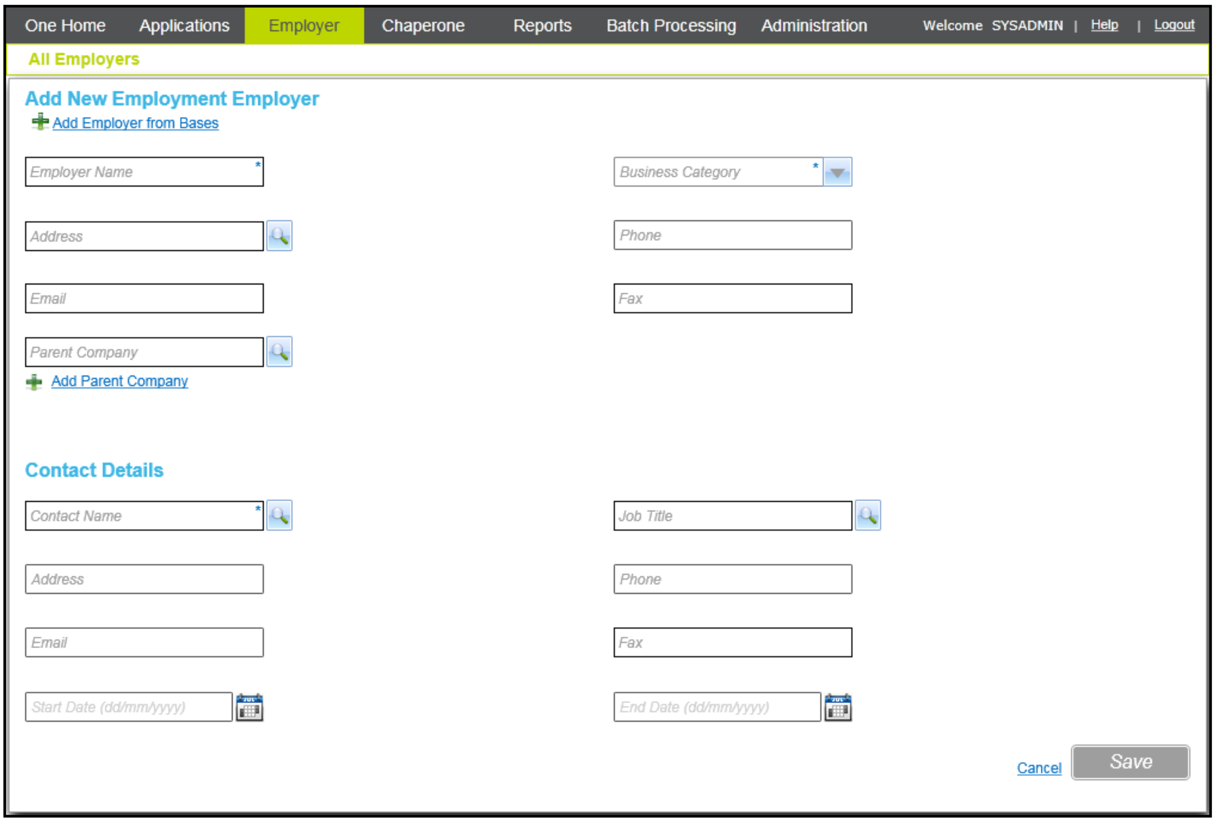
1. From the One homepage, click the **Applications** button to display the **Applications** area.
2. Select the **Employer** area to display the **All Employers** page.



3. Click the **Add New Employer** hyperlink to display the **Add New Employer** dialog.



4. Select the required type of employer then click the **Select** button to display the **Add New Employment Employer/Entertainment Employer** page.



5. Enter the details for the employer. **Employer Name**, **Business Category** and **Contact Name** are required fields.

   Alternatively, click the **Add Employer from Bases** hyperlink to select an existing base from the One database as an employer. For more information, see Creating a New Employer via the Add new Employer from Bases Hyperlink on page *66*.

6. Enter any additional details.
7. If required, add a parent company:
   a. Click the **Add Parent Company** hyperlink to display the **Parent Company Details** dialog.
   b. Enter the company details. **Company Name** is required.
   c. Click the **Save** button.

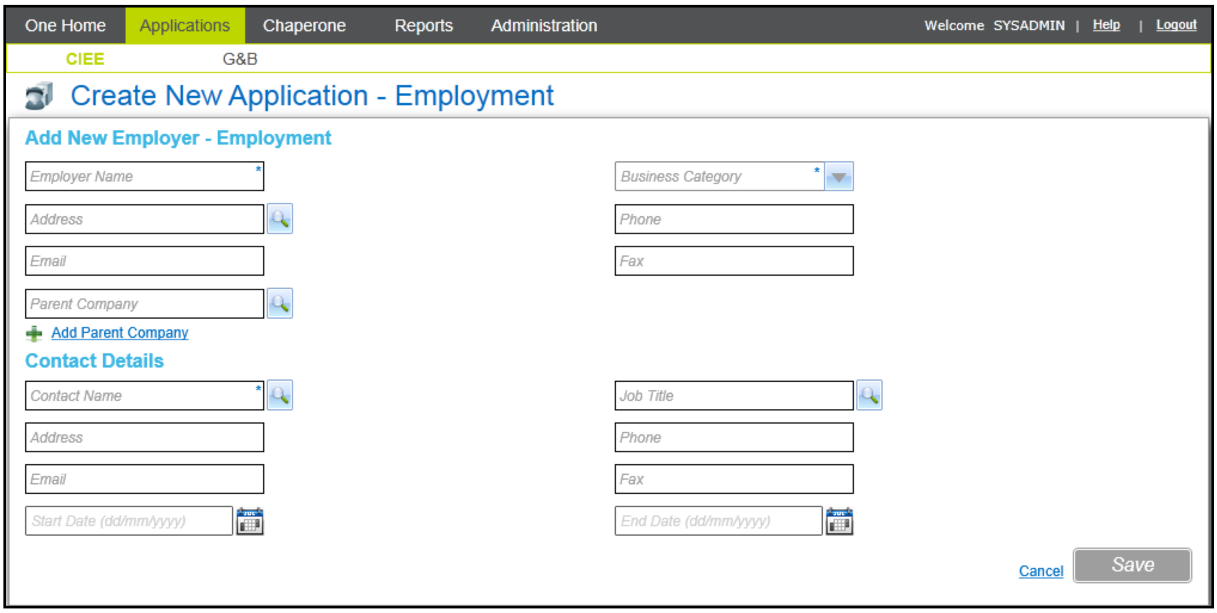
NOTE: *You cannot add a parent company when creating a new entertainment employer.*

8. Click the **Save** button to display the details of the employer.

Creating a New Employer via the Add New Employer Hyperlink

Users with the appropriate permissions can add the details of an employer that is not already recorded in One while creating an application.

1. From the **Create New Application** page, click the **Add New Employer** hyperlink to display the **Add New Employer** page.



2. Enter the details for the employer. **Employer Name**, **Business Category** and **Contact Name** are required fields.
3. Enter any additional details.
4. If required, add a parent company:
   a. Click the **Add Parent Company** hyperlink to display the **Parent Company Details** dialog.
   b. Enter the company details. **Company Name** is required.
   c. Click the **Save** button.

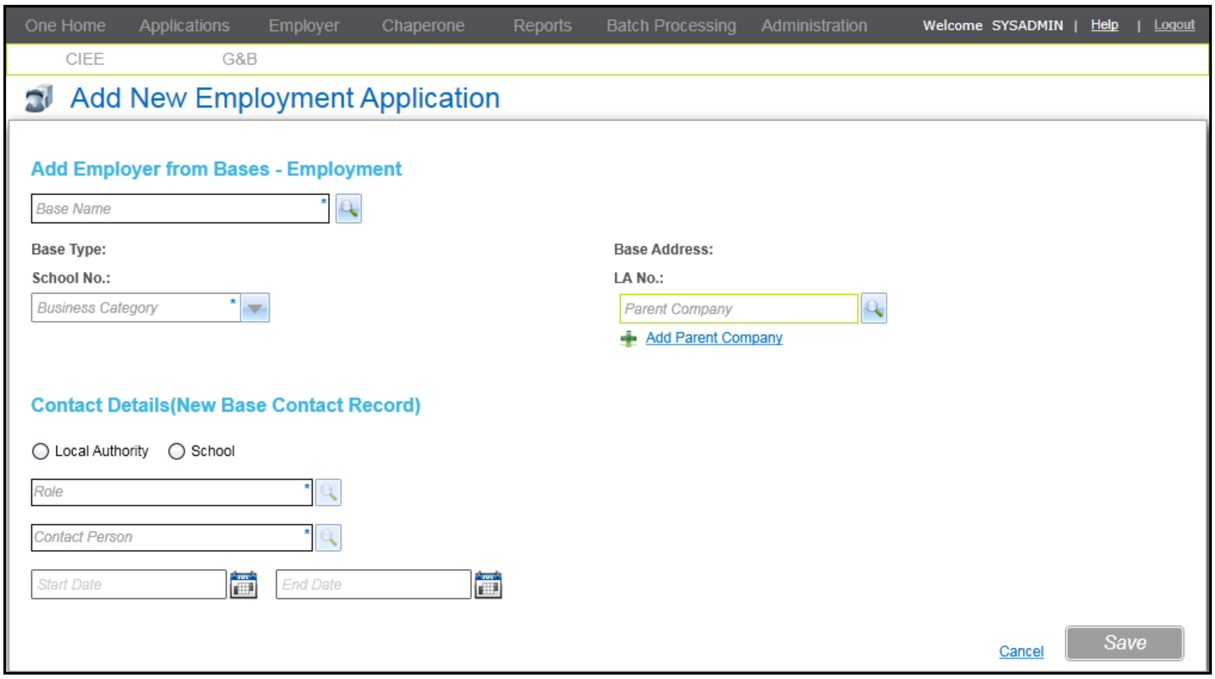
> ***NOTE:*** *You cannot add a parent company when creating a new employer via an entertainment application.*

5. Click the **Save** button to return to the **Add New Employment Application/Entertainment Application** page.

Creating a New Employer via the Add new Employer from Bases Hyperlink

When creating an application or adding a new employer via the **Employer** area, users with the appropriate permissions can add the details of an employer that is not already recorded in One using an existing base.

1. From the **Create New Application** page or the **Add New Employment/Entertainment Employer** page, click the **Add New Employer from Bases** hyperlink to display the **Add New Employer from Bases** dialog.



2. Enter the details for the employer. **Base Name**, **Business Category, Role** and **Contact Person** are required fields.
3. Enter any additional details.
4. If required, add a parent company:
   a. Click the **Add Parent Company** hyperlink to display the **Parent Company Details** dialog.
   b. Enter the company details. **Company Name** is required.
   c. Click the **Save** button.

NOTE: *You cannot add a parent company when creating a new employer via an entertainment application.*

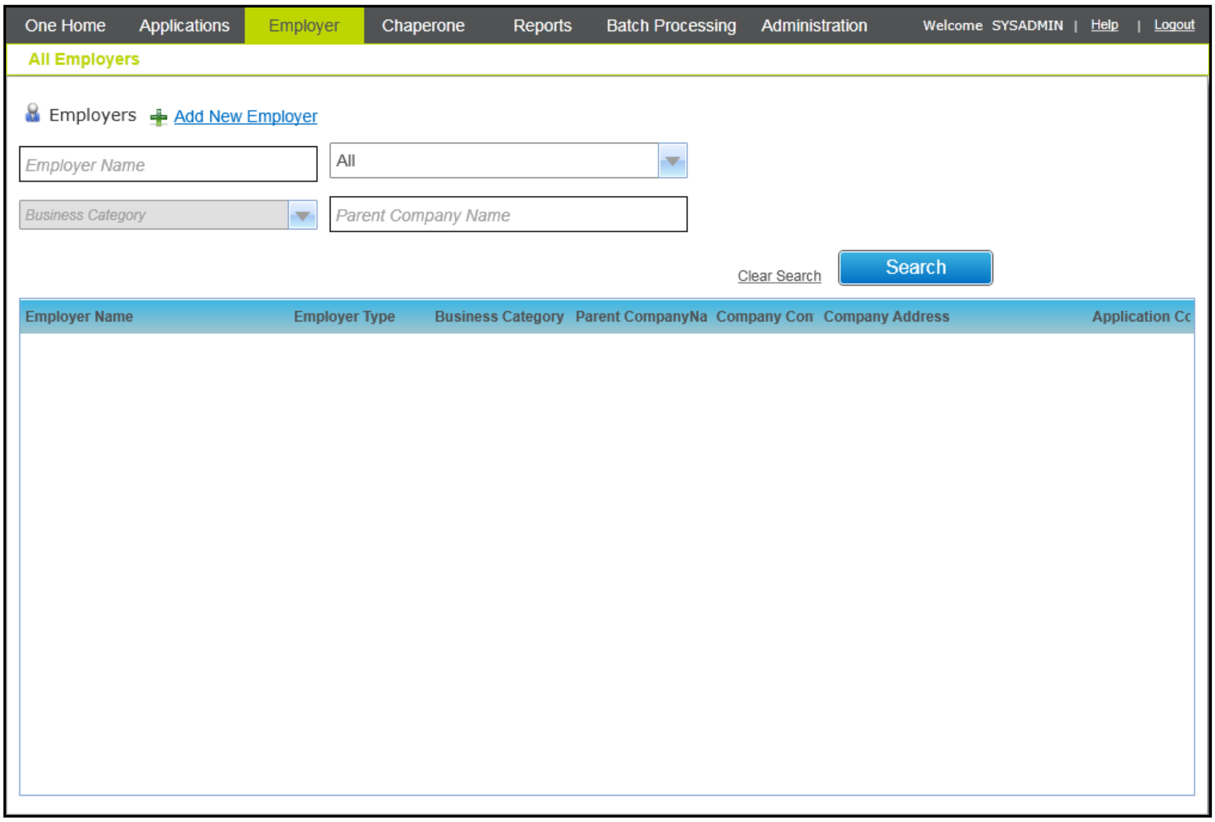
5. Click the **Save** button to return to the **Add New Employment Application/Entertainment Application** page.

Viewing Employer Details

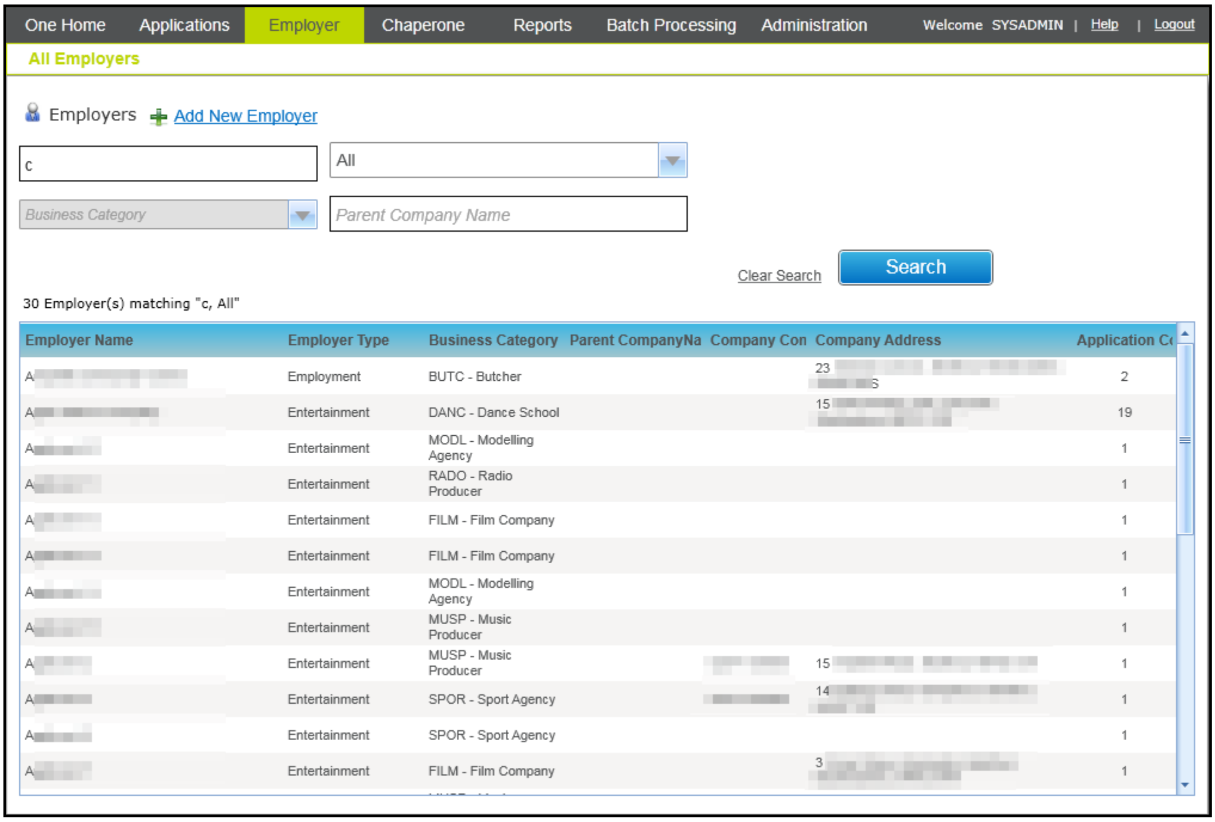
You can view an employer's details from within an application by clicking the **View Employer Details** hyperlink. When clicked from within an application, this displays the details of the employer currently associated with the application.

To view the details of any employer recorded in the One database:

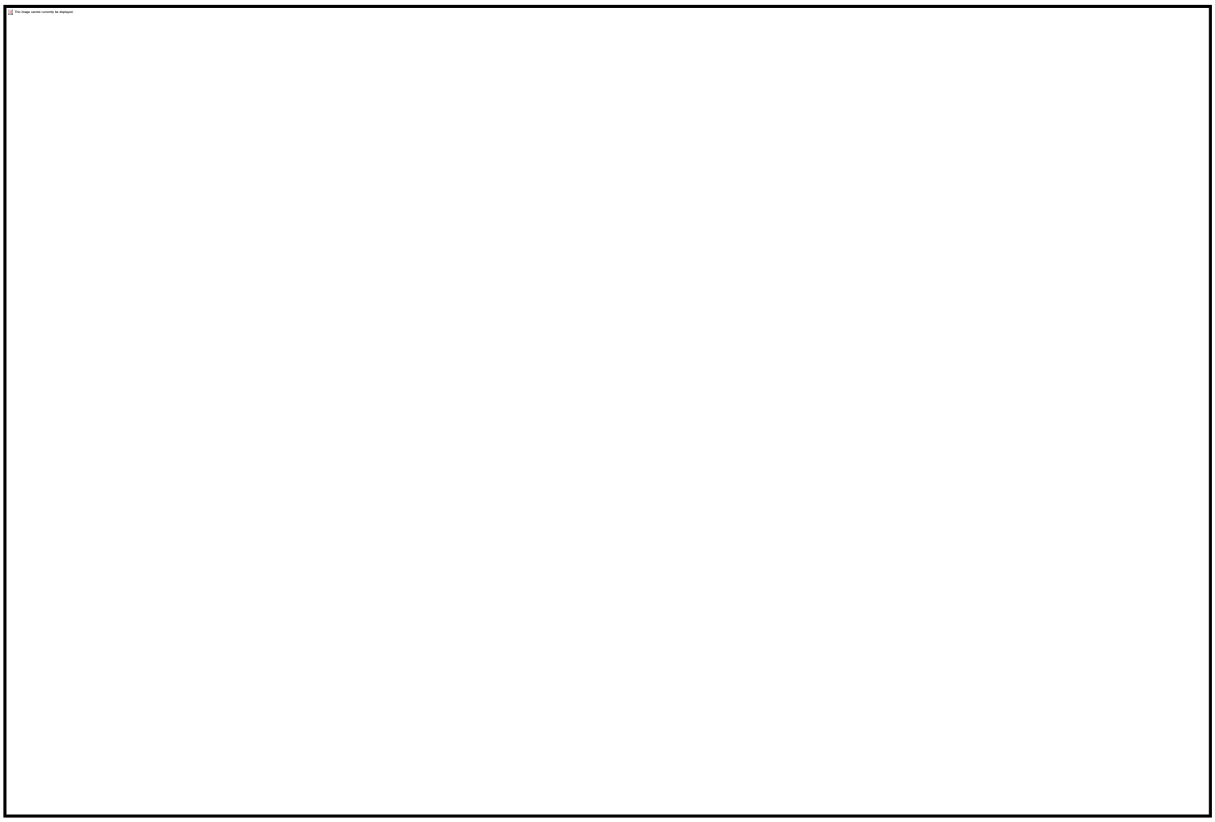
1. From the One homepage, click the **Applications** button to display the **Applications** area.
2. Select the **Employer** area to display the **All Employers** page.



3. Enter the search criteria for the employer you want to view.
4. Click the **Search** button to display a list of employers of employers that meet the criteria.

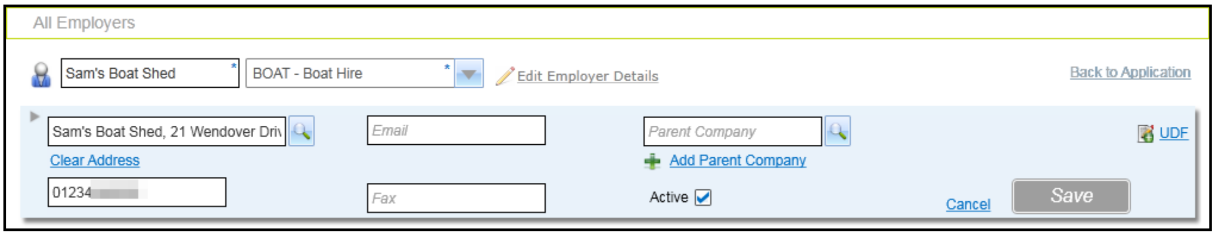


5. Click the employer name to display their details.



Editing Employer Details

1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Click the **Edit Employer Details** hyperlink to enable editing.



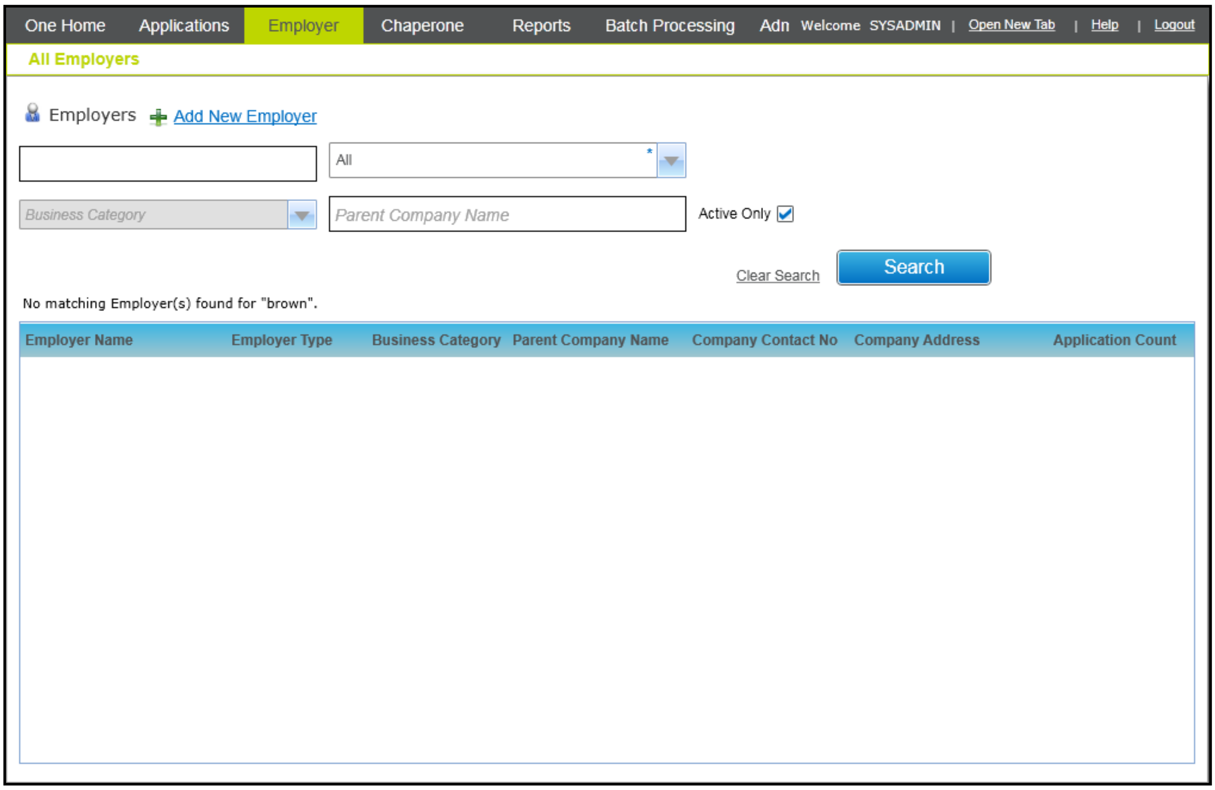
3. Make the required changes to the employer details.
4. Click the **Save** button.

Deactivating an Employer

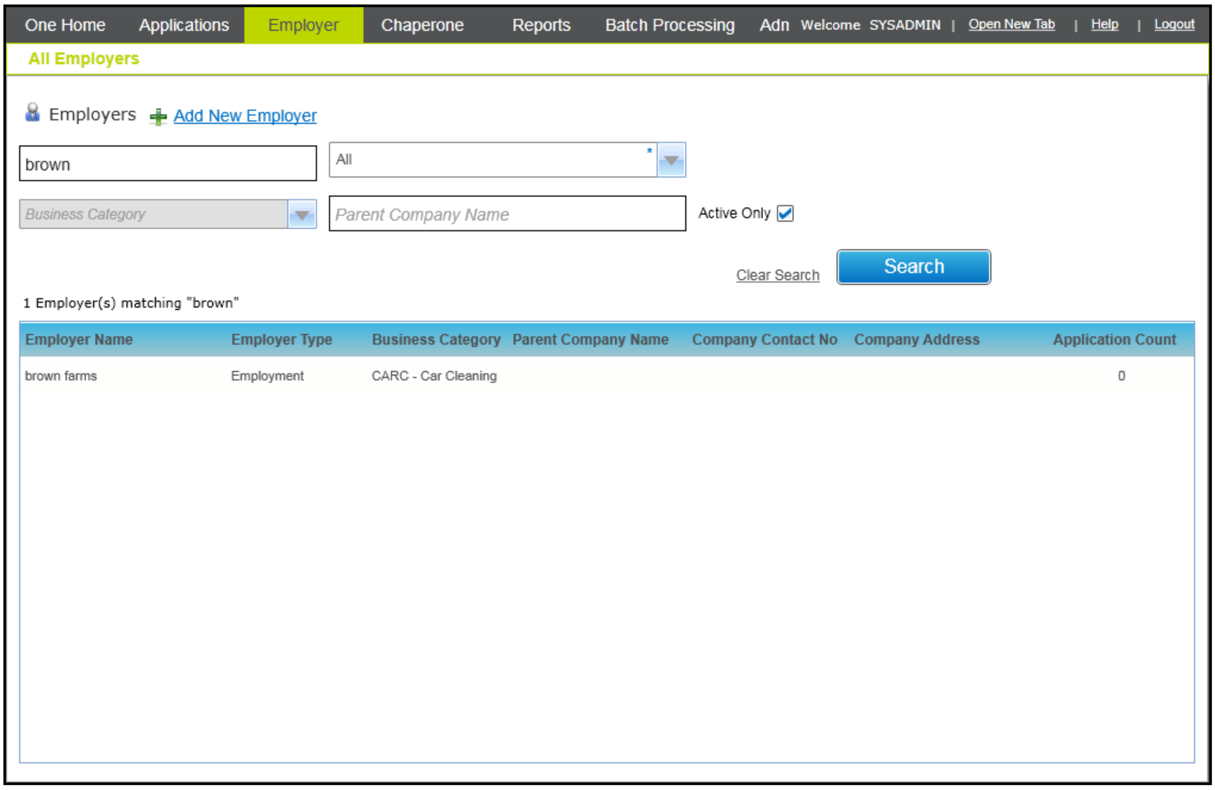
If you do not want an employer to be returned by default by the employer search, you can deactivate the employer's record. You might do this if the employer has ceased trading, but you cannot delete the employer because it has had work permits issued against it in the past. If an employer does not have any associated applications, you can delete the employer. For more information, see Deleting an Employer on page *71*.

To deactivate an employer:

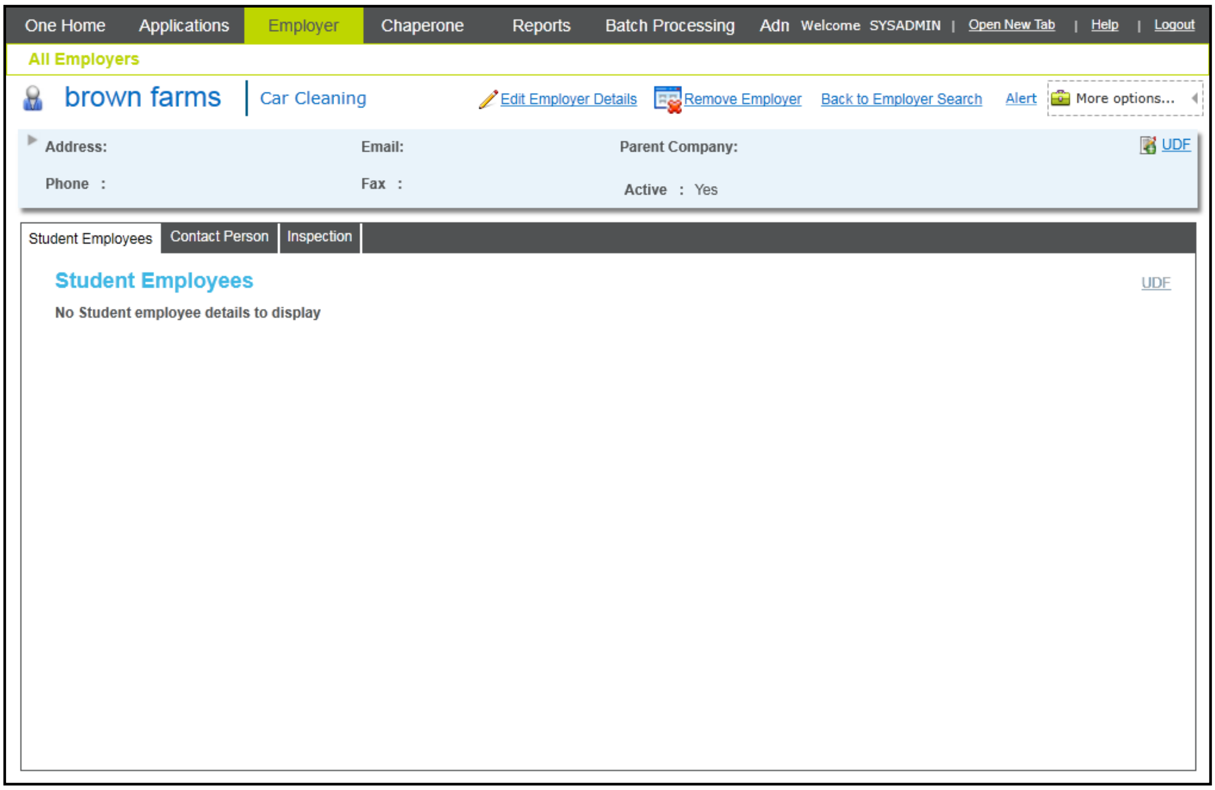
1. From the One homepage, click the **Applications** button to display the **Applications** area.
2. Select the **Employer** area to display the **All Employers** page.



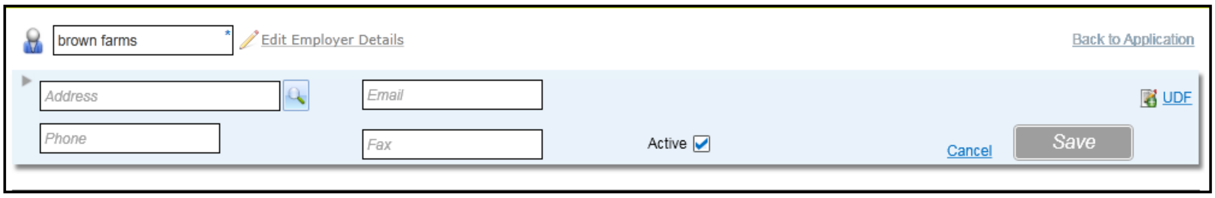
3. Enter the search criteria for the employer you want to deactivate.
4. Click the **Search** button to display a list of employers that match the search criteria.



5. Click the required employer name in the list to display their details.



6. Click the **Edit Employer Details** hyperlink to enable editing.



7. Deselect the **Active** check box to display the **Inactive Date** and **Inactive Reason** fields.

8. Select the required **Inactive Date** and **Inactive Reason**.
9. Click the **Save** button.

   You can reactive an employer by selecting the **Active** check box.

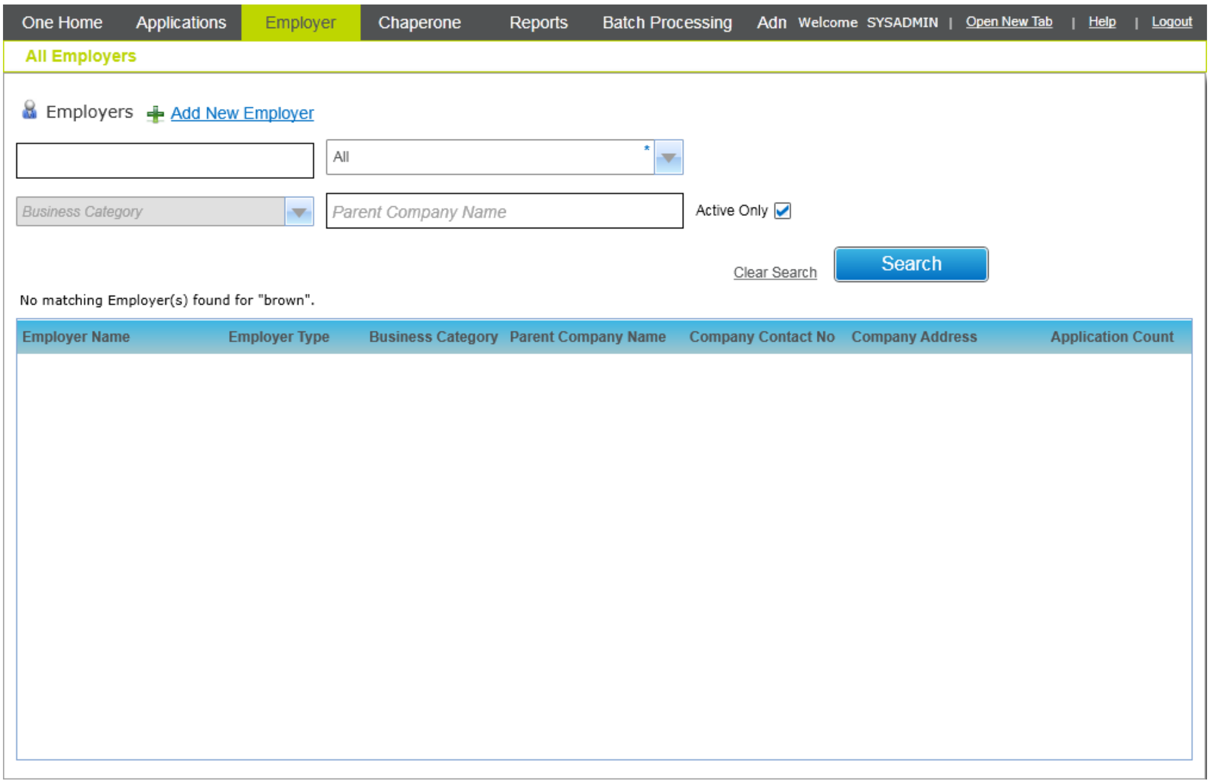
Deleting an Employer

If you no longer require an employer record, you can delete it. However, you cannot delete employers that are associated with any applications. If you want to delete an employer, you must first delete any associated applications. If any of the associated applications have ever had a work permit issued against them, then you cannot delete the application and therefore cannot delete the employer record. If you cannot delete an employer, but you no longer want it be returned when searching for employers, you can make it inactive. For more information, see Deactivating an Employer on page *69*.

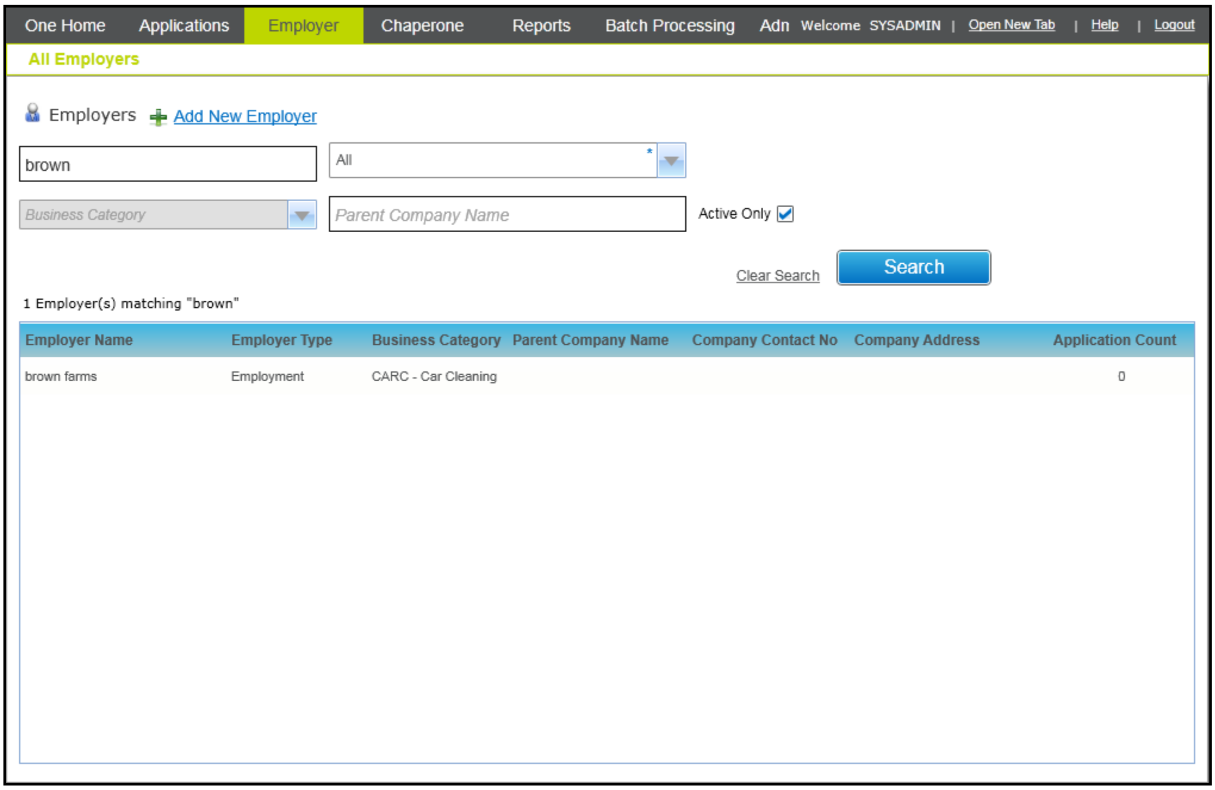
To delete an employer record:

1. From the One homepage, click the **Applications** button to display the **Applications** area.

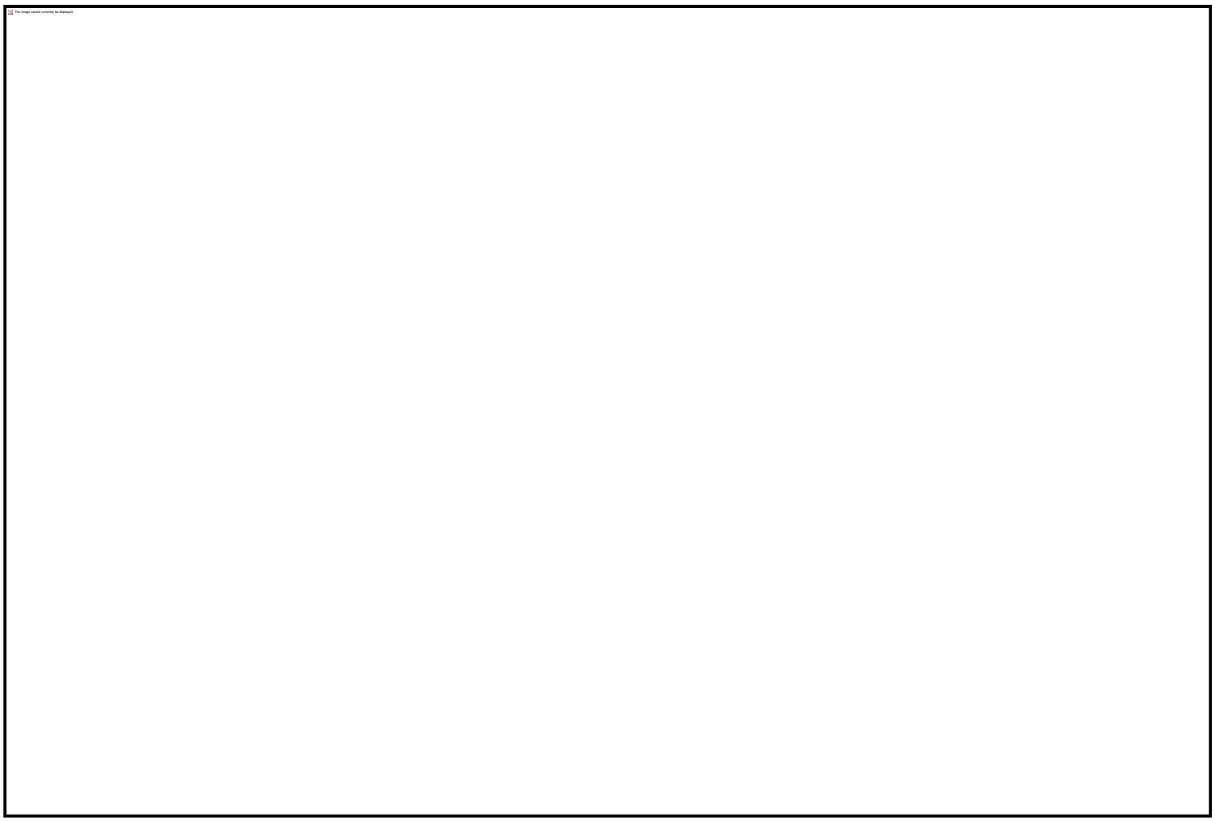
2. Select the **Employer** area to display the **All Employers** page.



3. Enter the search criteria for the employer whose details you want to delete.
4. Click the **Search** button to display a list of employers that match the search criteria.



5. Click the required employer name in the list to display their details.



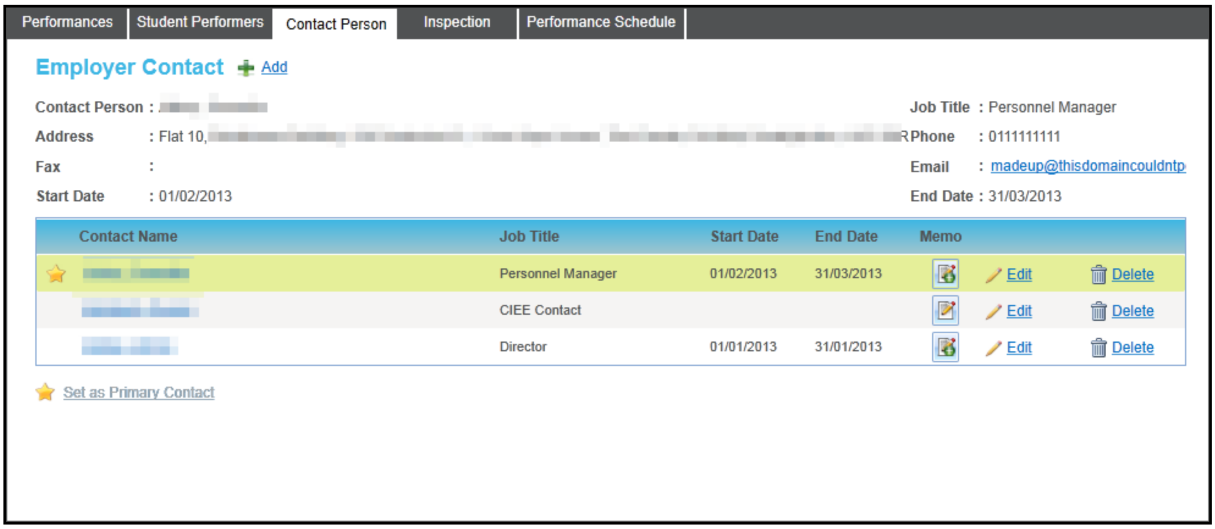
6. Click the **Delete Employer** hyperlink to display the **Delete Employer** dialog.

7. Click the **Yes** button to display a confirmation dialog.
8. Click the **OK** button.

Viewing Contact Person Details

1. Open the record for the employer whose contact details you want to view. For more information, see Viewing Employer Details on page *67*.
2. Select the **Contact Person** tab to display a list of current contacts in the **Employer Contact** section.

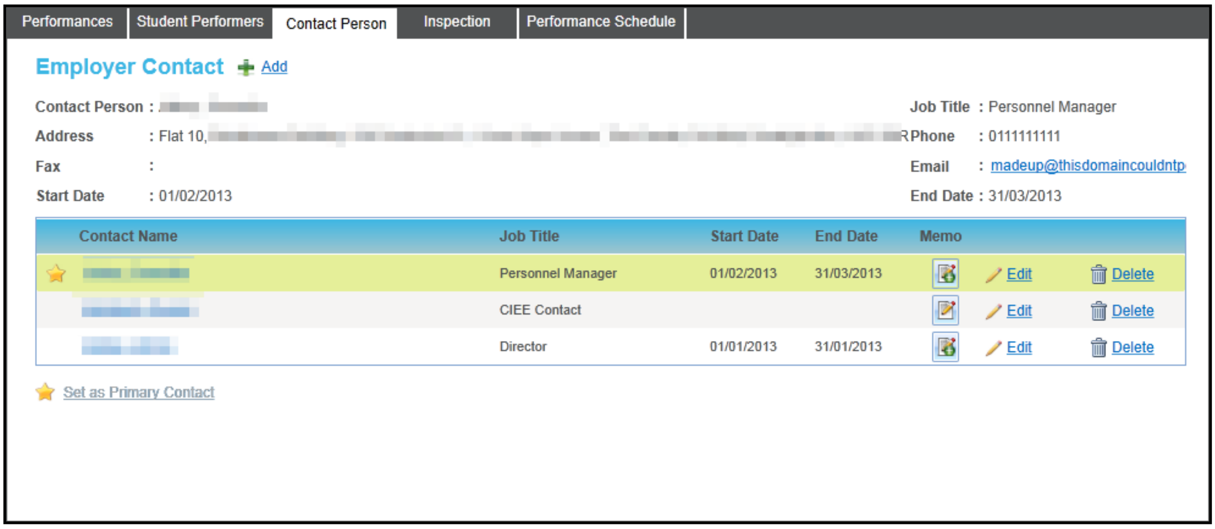
   Relevant contact details are displayed for the person selected in the list.



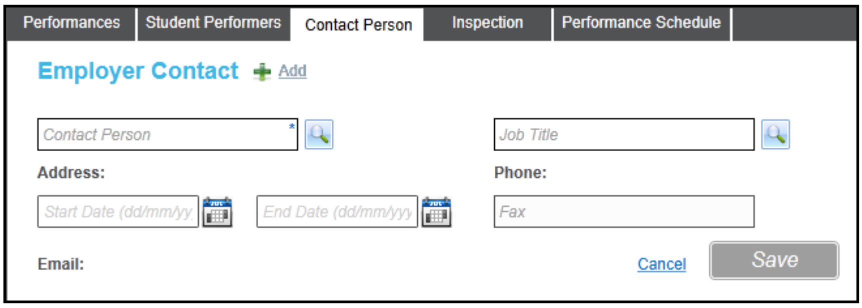
3. To view details for a different contact, highlight their name in the list.
4. To view additional details about a specific person, click their name in the list to display the **Person Details** window for that person.

Adding a Person as an Employer Contact

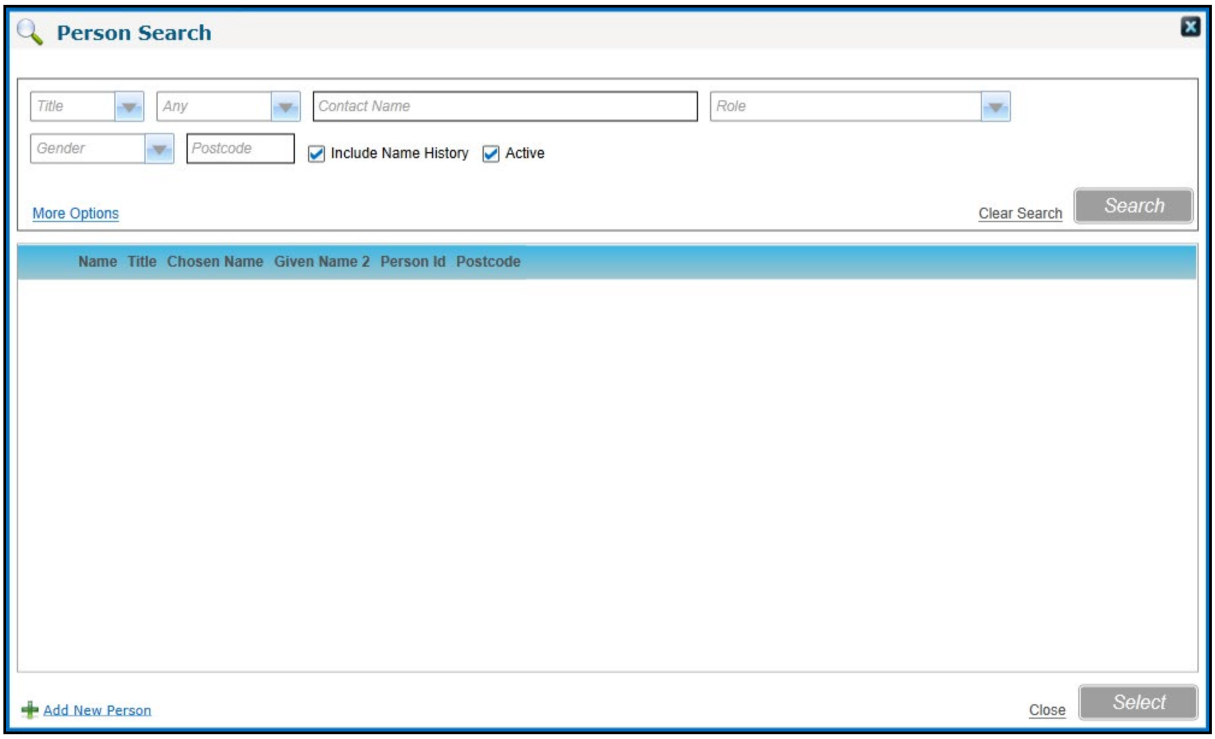
1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Contact Person** tab to display a list of current contacts in the **Employer Contact** section.



3. Click the **Add** hyperlink to enable data entry.



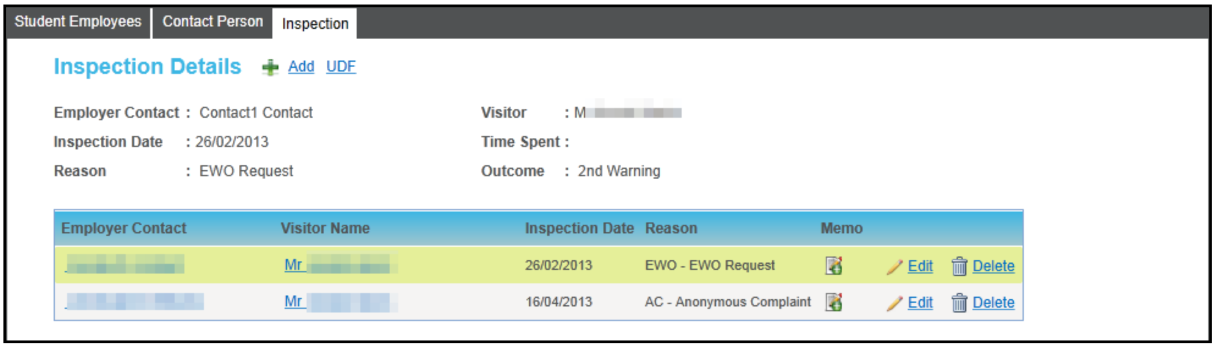
4. Click the **Contact Person** browse button to display the **Person Search** browser.



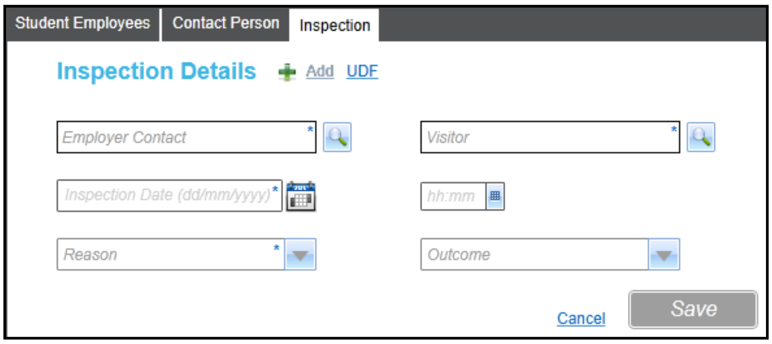
5. Enter search criteria for the person you wish to add then click the **Search** button to display a list of people who match the entered search criteria.
6. Highlight the required person then click the **Select** button to add them to the **Employer Contact** information.

Adding an Employment Inspection Report

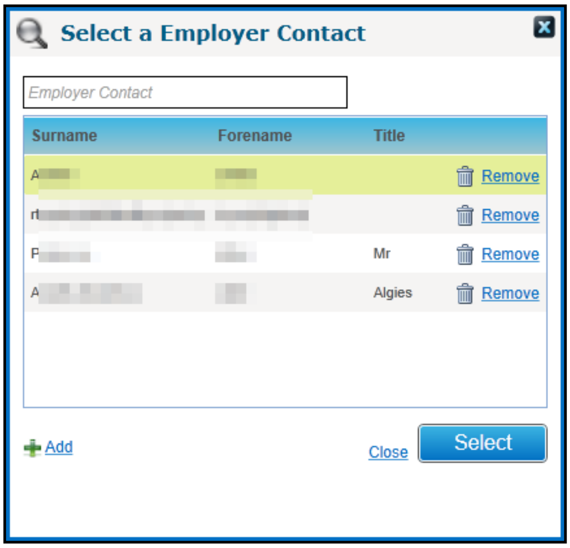
1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Inspection** tab.



3. Click the **Add** hyperlink to display blank fields in the **Inspection Details** section.



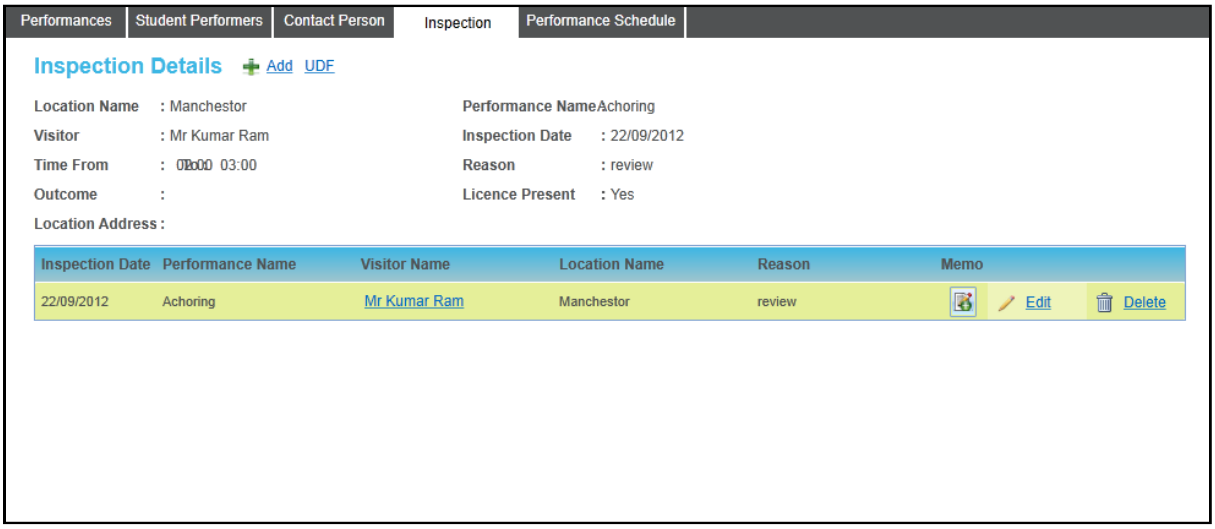
4. Click the **Employer Contact** browse button to display the **Select a Employer Contact** browser.



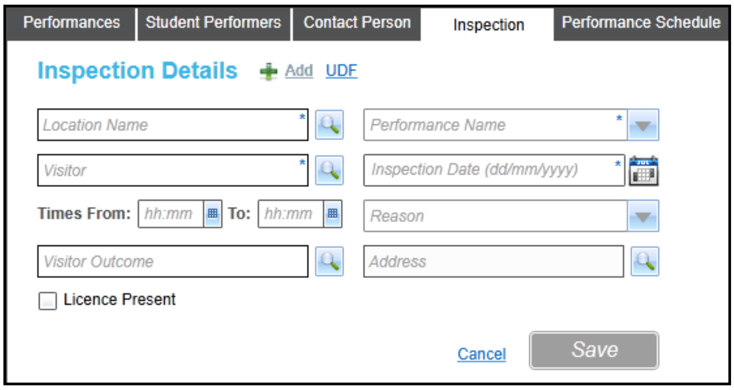
5. Highlight the required person then click the **Select** button to add them to the inspection details.
6. If required, select a different **Visitor**.
7. Add an **Inspection Date**.
8. Select a **Reason** from the drop-down list.
9. Select any other optional information.
10. Click the **Save** button.

Adding an Entertainment Inspection Report

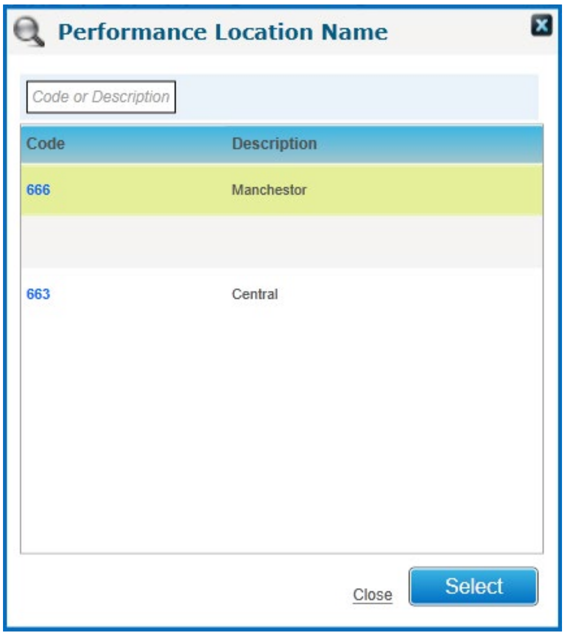
1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Inspection** tab.



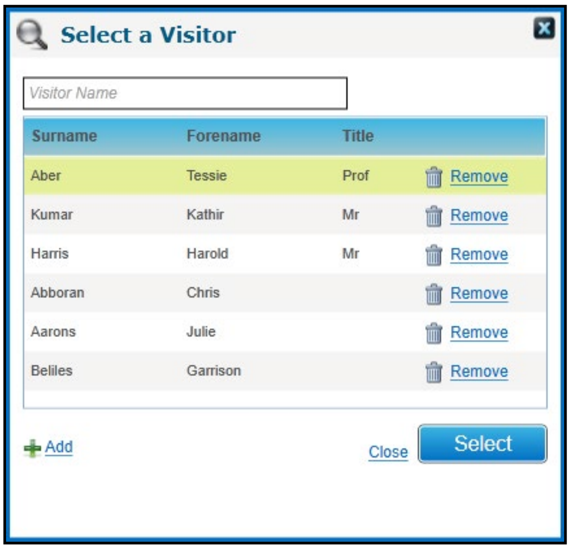
3. Click the **Add** hyperlink to display blank fields in the **Inspection Details** section.



4. Click the **Location Name** browse button to display the **Performance Location Name** browser.



5. Highlight the required location then click the **Select** button to add the venue to the inspection.
6. Click the **Visitor** browse button to display the **Select a Visitor** browser.



7. Highlight the required visitor then click the **Select** button to add the visitor to the inspection.
8. Select a **Performance Name**.
9. Select an **Inspection Date.**
10. Select any other optional information.
11. Click the **Save** button.

Viewing an Inspection Report

1. Open the record for the employer whose details you want to edit. For more information, see see Viewing Employer Details on page *67*.
2. Select the **Inspection** tab.
3. Select an inspection in the list to display the details in the **Inspection Details** header.

Editing an Inspection Report

1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Inspection** tab.
3. For the inspection you wish to update, click the **Edit** hyperlink to enable editing. For more information, see *Adding an Employment Inspection Report* on page *75* or *Adding an Entertainment Inspection Report* on page *76*.
4. Make any required changes. Click the **Save** button.

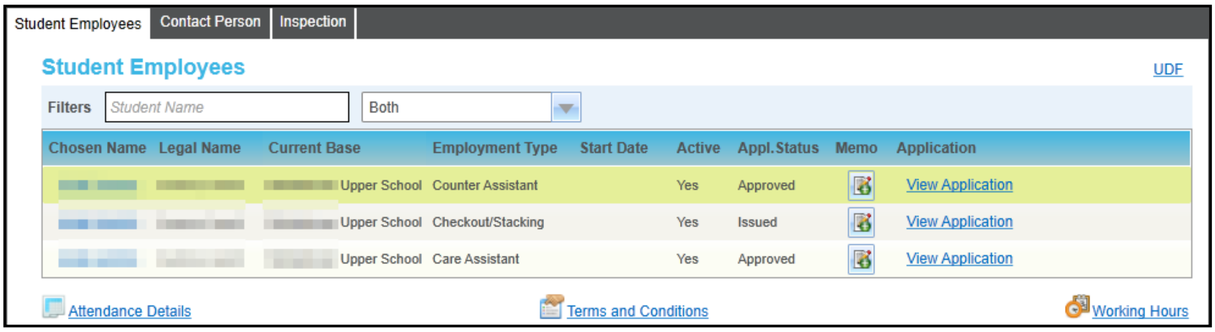
Deleting an Inspection Report

1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Inspection** tab.
3. For the inspection you wish to remove, click the **Delete** hyperlink to display the **Delete Inspection Details** confirmation dialog.
4. Click the **Yes** button to delete the inspection.

Viewing the Student Employees List

You can view all the students employed by a specific employer in the **Student Employees** tab for that employer. From the list, you can view information on any of the employed students, including their attendance record, employment terms and conditions and working hours.

1. Open the record for the employer whose details you want to edit. For more information, see [Viewing Employer Details](#) on page *67*.
2. By default the **Student Employees** tab, which contains the **Student Employees** list, is displayed.

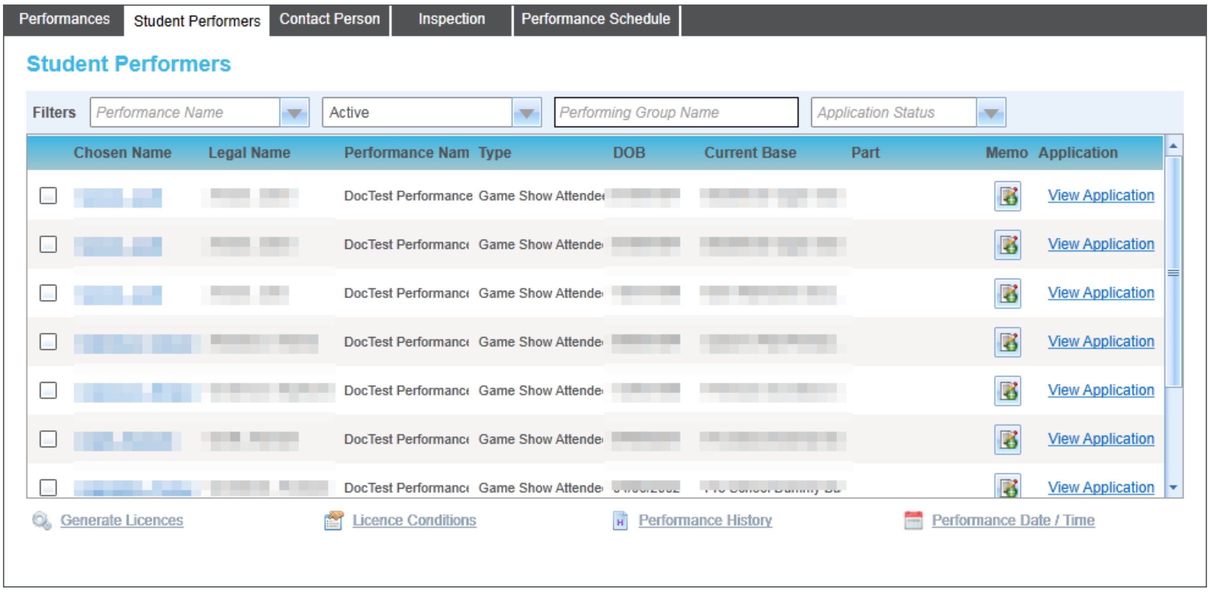


3. If required, use the filters to find a specific student.
4. To view a student employee's details, highlight their name in the list then click the **View Application**, **Attendance Details**, **Terms and Conditions** or **Working Hours** hyperlink as required.

Viewing the Student Performer List

The **Student Performers** tab displays all the students who have an active performance licence application associated with the selected employer. The list provides basic information about the student and performance and also provides a link to view the entire application. You can also access and edit the student's licence conditions, view their performance history and schedules via the provided hyperlinks.

1. Open the record for the employer whose details you want to edit. For more information, see [Viewing Employer Details](#) on page *67*.
2. Select the **Student Performers** tab.

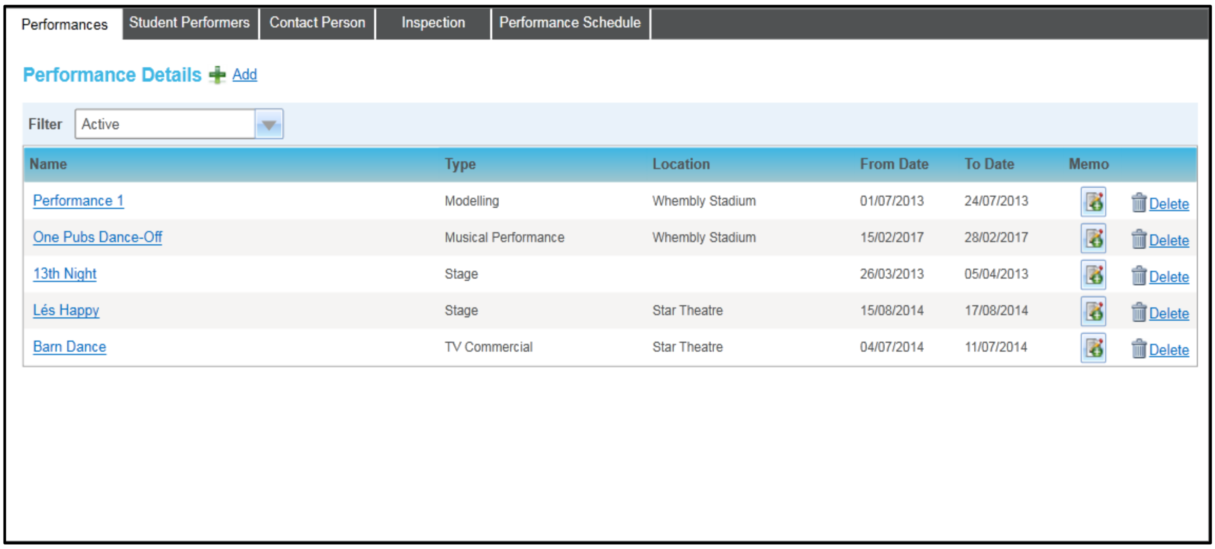


3. If necessary, use the filters to locate the student whose information you wish to view.
4. Click the student's name to display their basic details or click the **View Application** hyperlink to display the entire application.
5. To edit the student's **Licence Conditions** or to view their **Performance History** or **Performance Date/Time**, select the check box adjacent to their name then click the appropriate hyperlink.

Viewing the Performances List

The **Performances** tab displays all the performances associated with a selected employer. In this tab you can also add, edit and delete performances.

1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Performances** tab to display the performances associated with the employer.



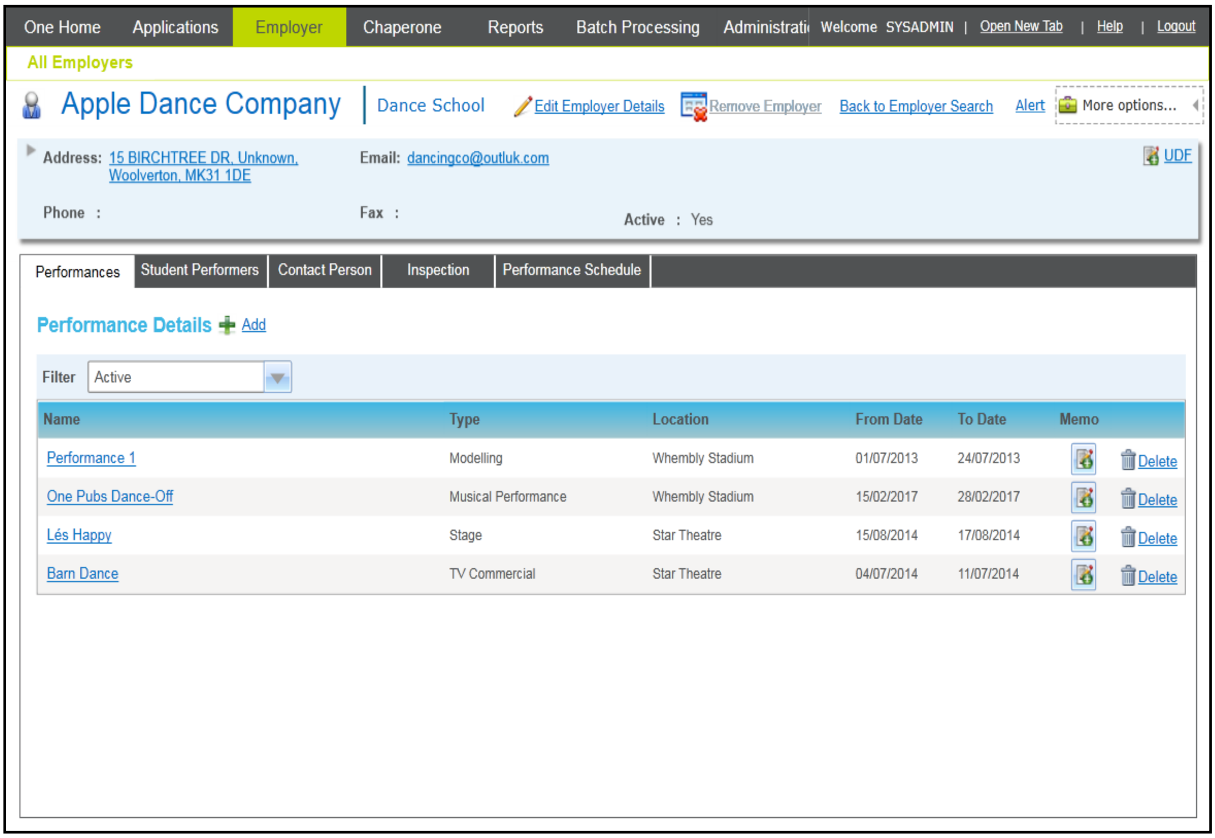
More Information:
Adding a Performance on page *80*
Deleting a Performance on page *83*

Adding a Performance

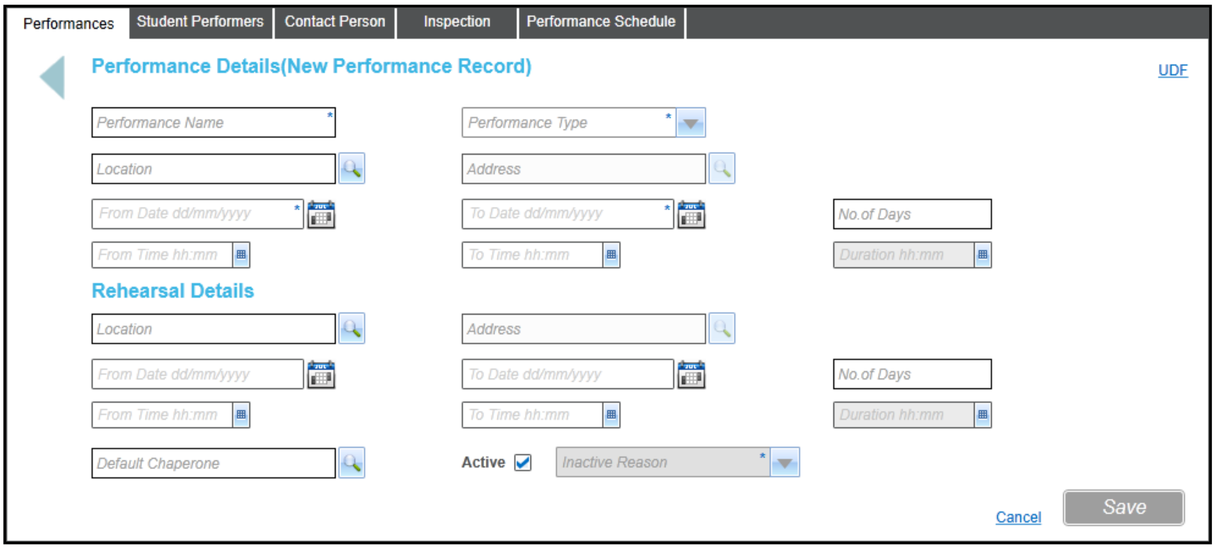
All applications must have a performance associated with them. A performance record contains information such as the name, type, location and dates of both the performance and rehearsals.

Once created, performances should be associated with performing groups via the **Performing Schedule** tab.

1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select *the* **Performances** *tab.*

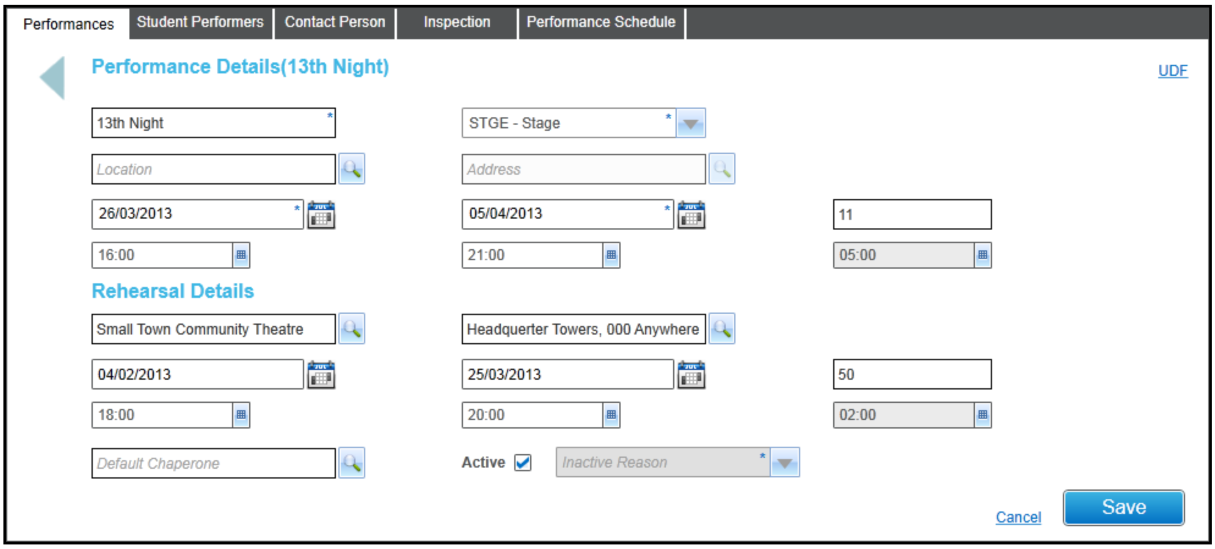


3. Click the **Add** button to display the **Performance Details (New Performance Record)** dialog.



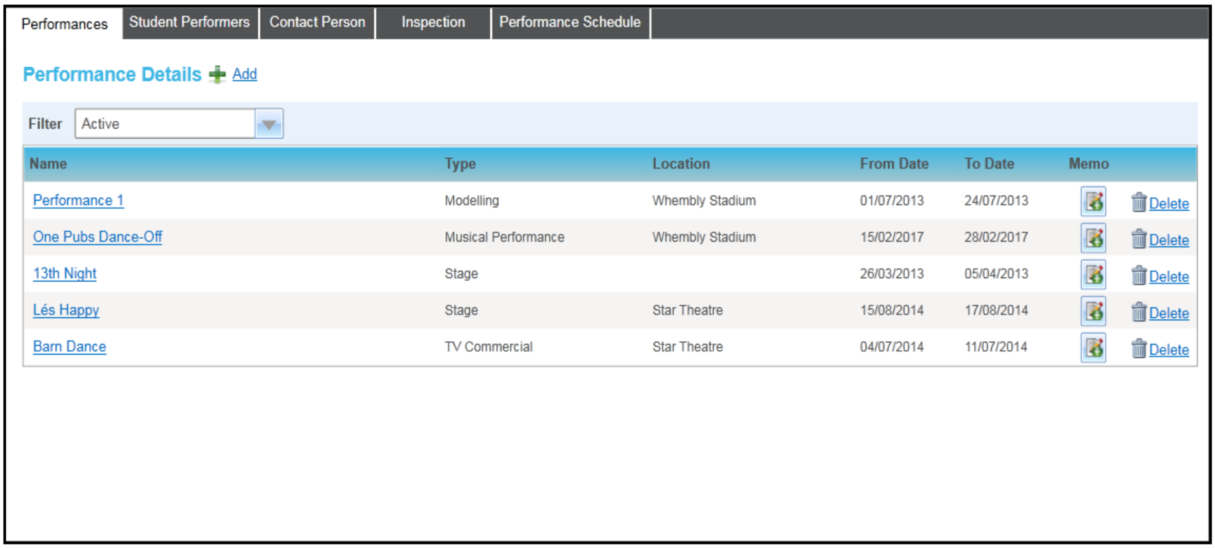
4. Enter the performance and rehearsal details. **Performance Name**, **Performance Type**, performance **From Date** and performance **To Date** are required fields.

> ***TIPS:*** *The **No. of Days** fields for a performance or rehearsal are calculated automatically when you add the required start and end dates. However, if there is not a performance or rehearsal every day, you can manually edit the fields. You can also enter a duration for the performance or rehearsal manually.*



5. Click the **Save** button. The details are displayed as read-only.
6. Click the blue arrow next to the **Performance Details** heading to return to the performance list.

   The newly added performance is now in the list of available performances.



You can now associate the performance with a performing group in the **Performance Schedule** tab. For more information, see Adding a Performing Group on page 83*.*

Editing a Performance

1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Performances** tab.
3. For the performance you wish to update, click the **Edit** hyperlink to enable editing.
4. Make the required changes.
5. Click the **Save** button.

Deleting a Performance

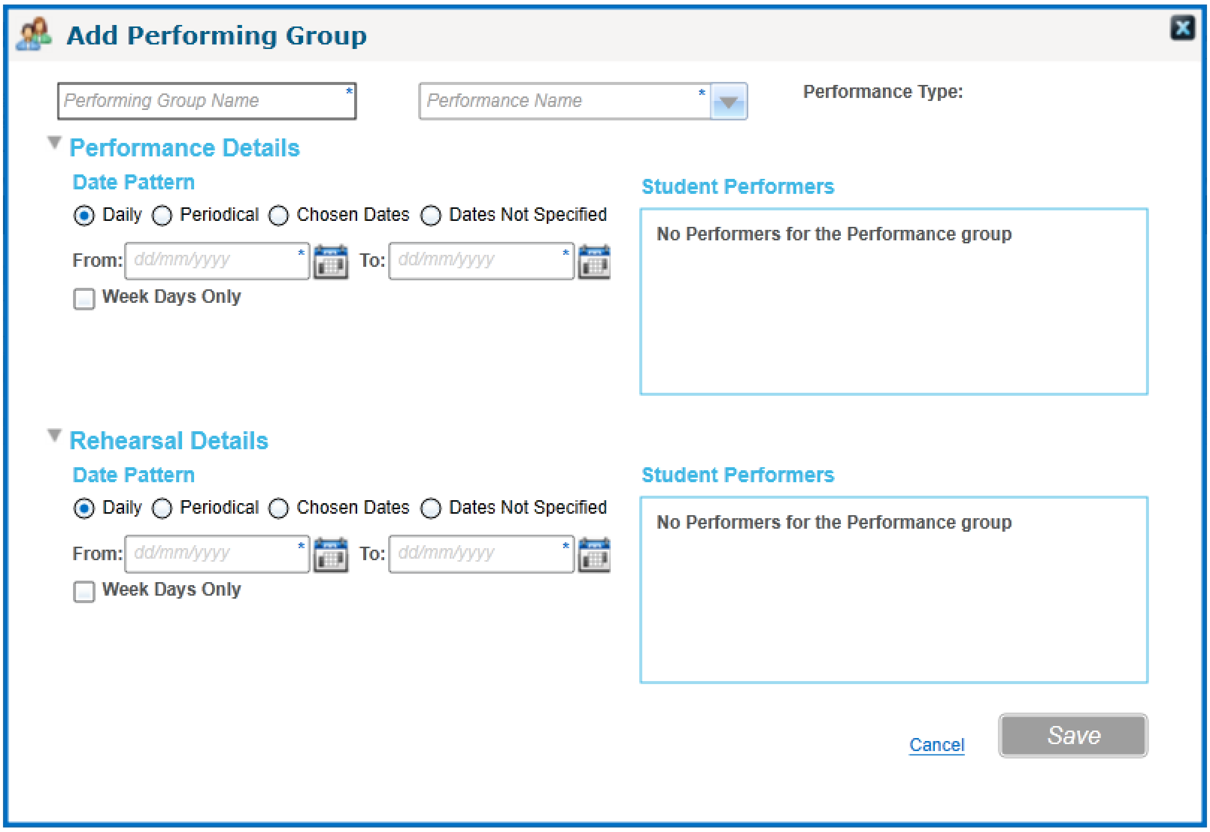
A performance can be deleted only if no active students are associated with it. If the performance is associated with active students, it must be removed from the student applications before it can be deleted.

1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Performances** tab.
3. For the performance you wish to delete, click the **Delete** hyperlink to display the **Delete Performance** confirmation dialog.
4. Click the **OK** button to delete the record.

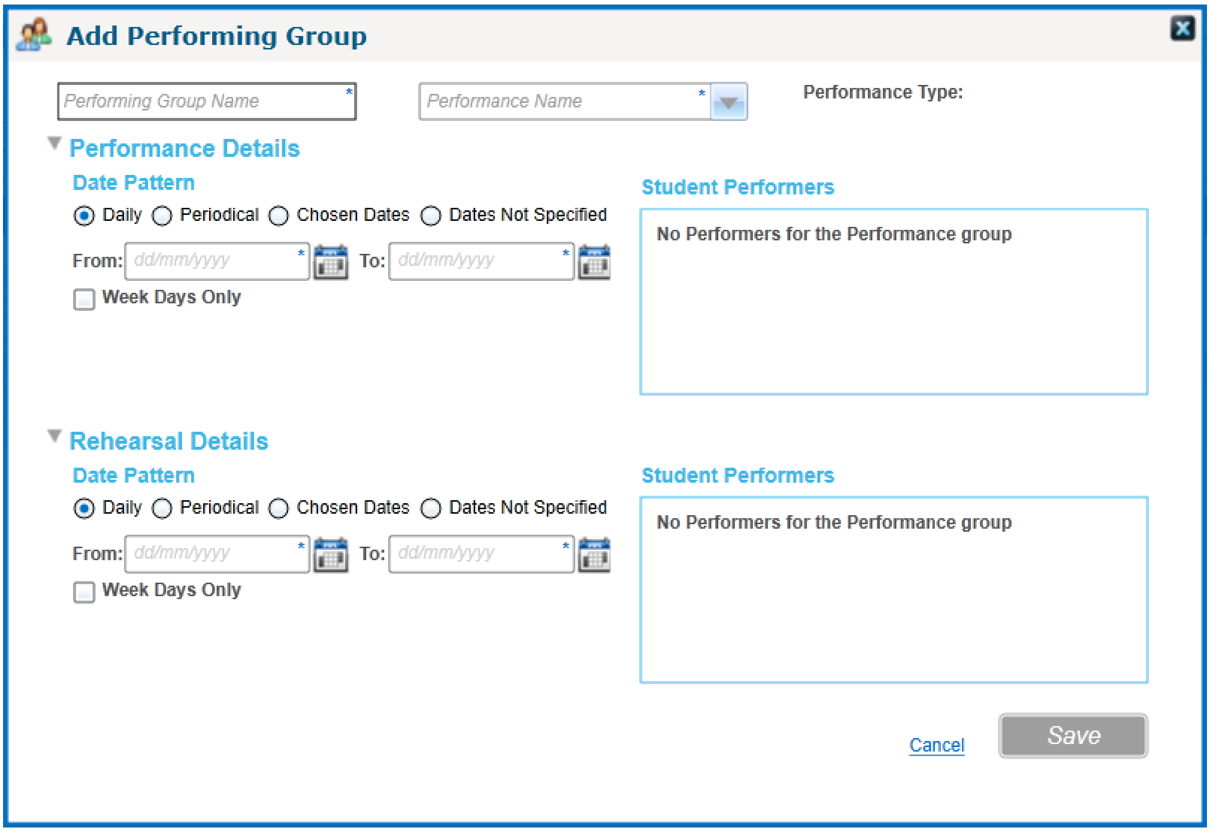
Adding a Performing Group

After creating a performance, you must associate the performance with a specific performing group. After a group is associated with a performance, the group can be associated with an application in the **Performance Schedule** tab of the application. Although a performance can have more than one performance group associated with it, a group can only be associated with one performance.

1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Performance Schedule** tab to display a list of groups and their associated performances.

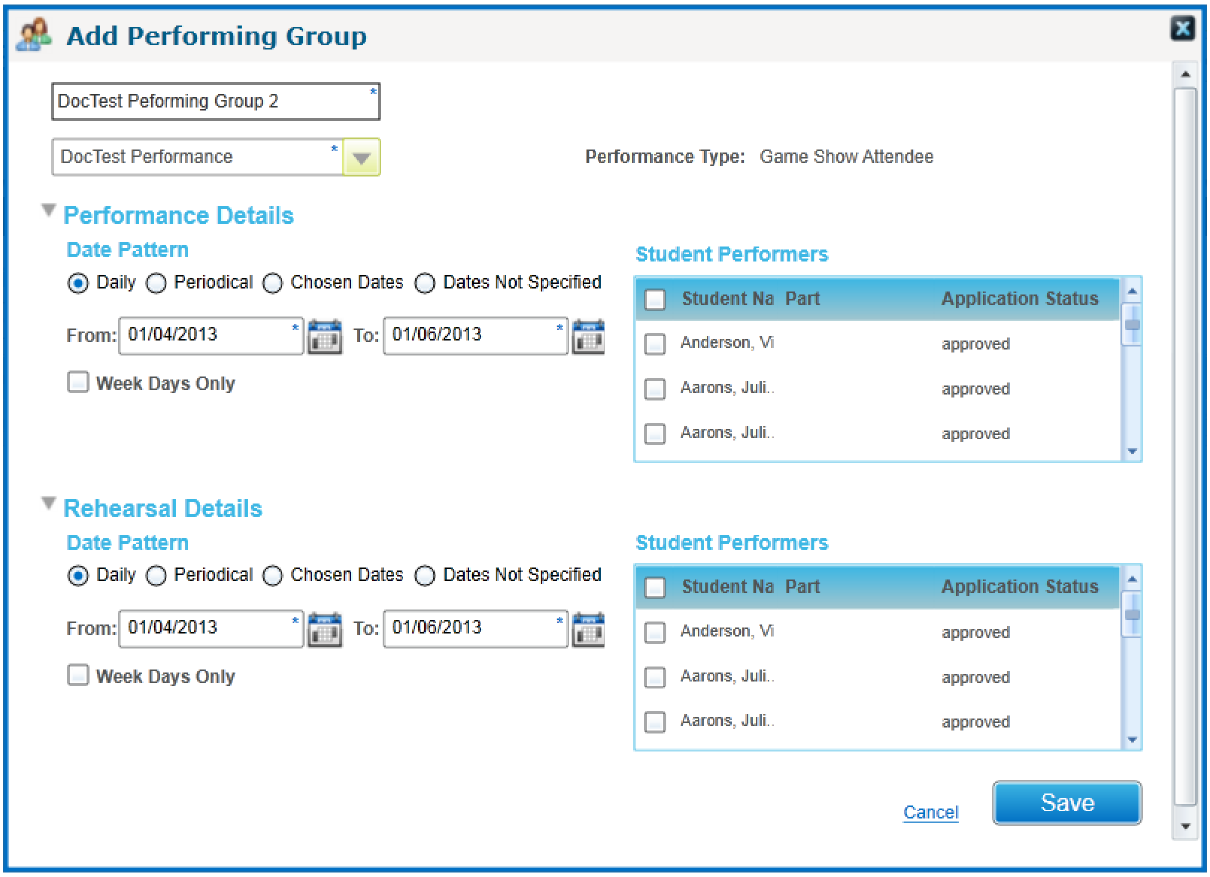


3. Click the **Add** hyperlink to display the **Add Performing Group** dialog.



4. Enter *a* **Performing Group Name**.
5. Select *a* **Performance Name**.

   If the selected performance already has associated applications, the names of the students are displayed in the **Student Performers** lists.



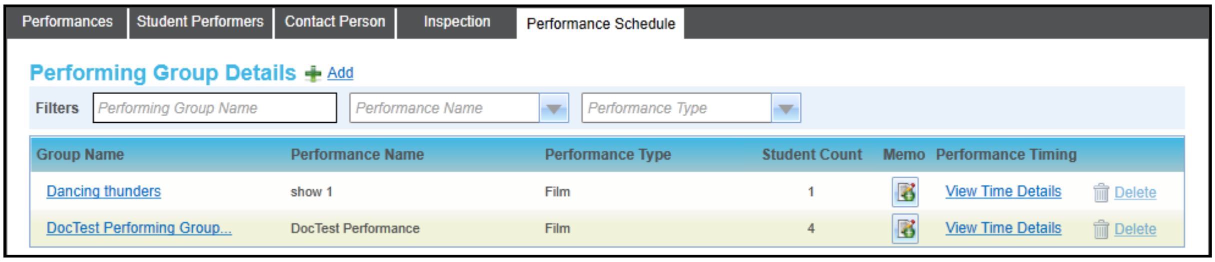
6. Set the **Performance Details** and **Rehearsal Details** as required for any associated students. For more information, see Setting Performance and Rehearsal Details for a Performing Group on page *85*.
7. Click the **Save** button.

Setting Performance and Rehearsal Details for a Performing Group

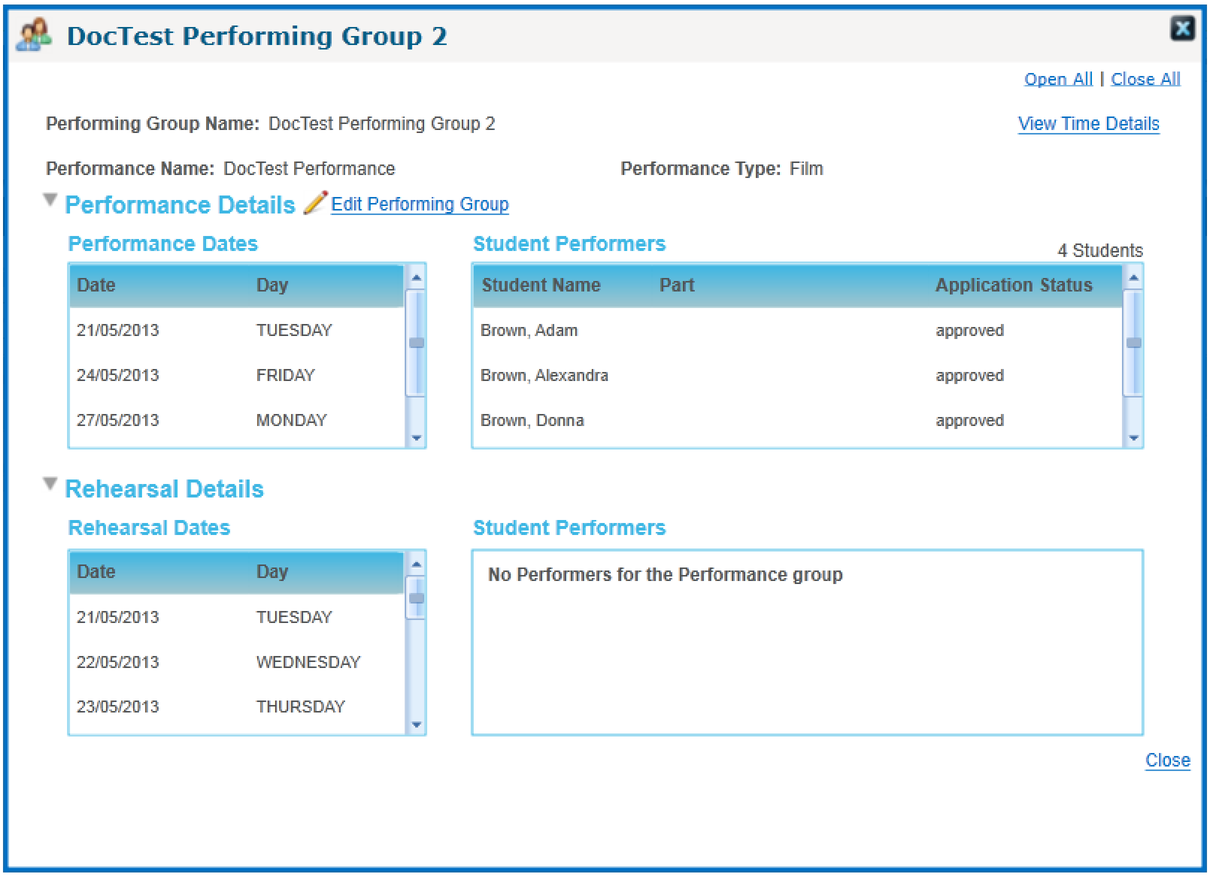
When defining or editing a performing group in the **Performance Schedule** tab, all the students in the group must have the same performance and rehearsal schedules. However, you can choose not to apply any schedule to members of a group by deselecting them. Changes made here are reflected in the student's **Performance Schedule** tab.

Although the following procedure starts by opening an existing group, the principles are the same if you are setting schedules while adding a new performing group.

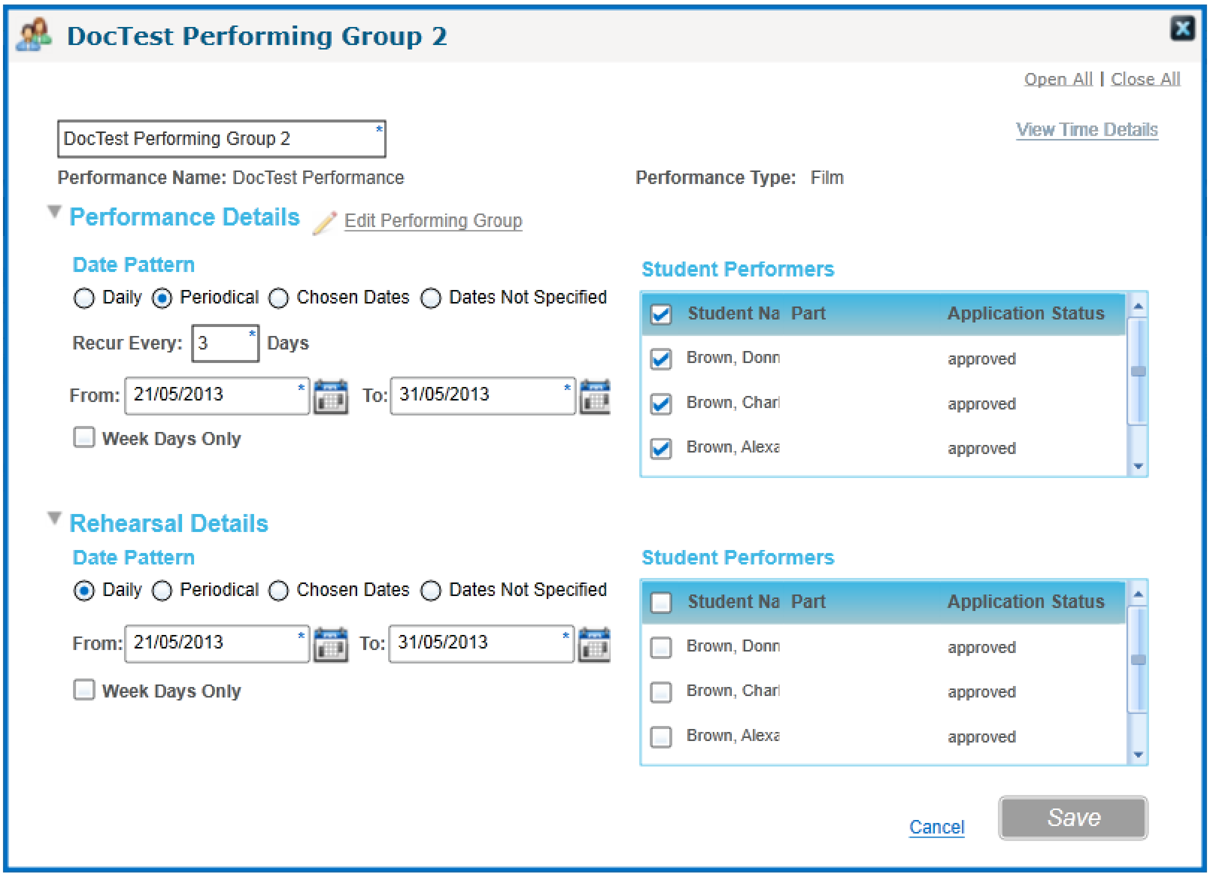
1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Performance Schedule** tab to display a list of groups and their associated performance.



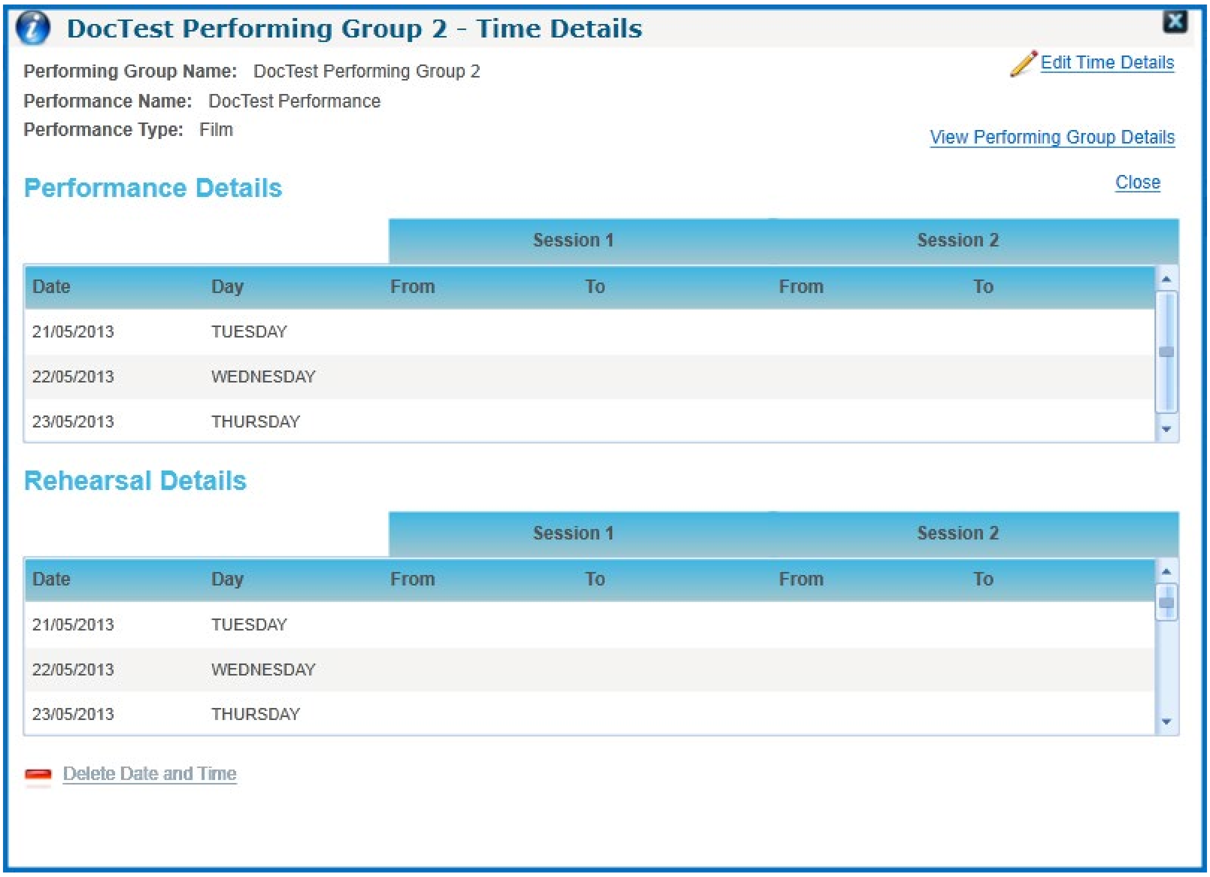
3. For the performing group you wish to edit, click the **Group Name** to display the group's details.



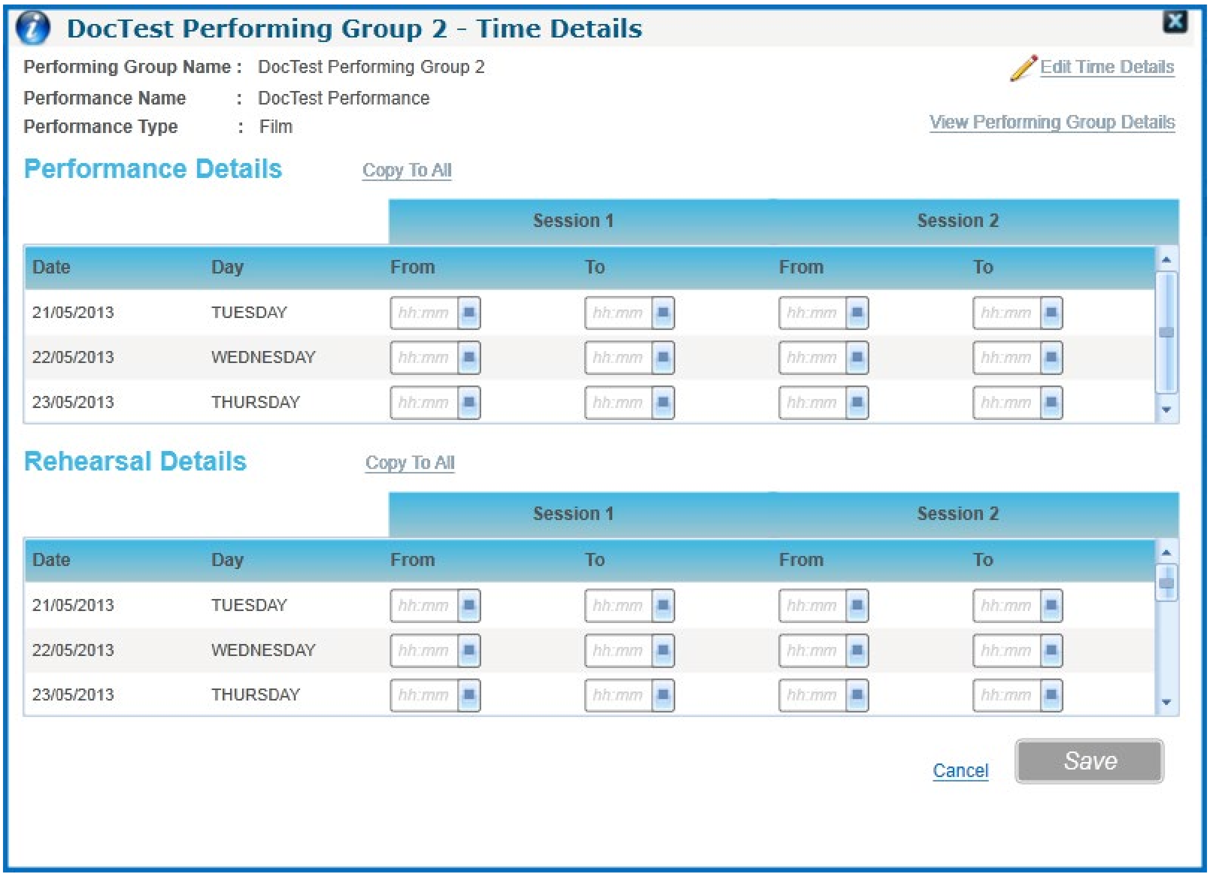
4. Click the **Edit Performing Group** hyperlink to enable editing.



5. Select the check box for the **Student Performers** for whom you wish to update **Performance Details**.
6. Select the required **Date Pattern** and enter any required details for the selected option.
7. To set specific times during the day, click the **Save** button then click the **View Time Details** hyperlink to display the **Time Details** window.



8. Click the **Edit Time Details** hyperlink to enable editing.

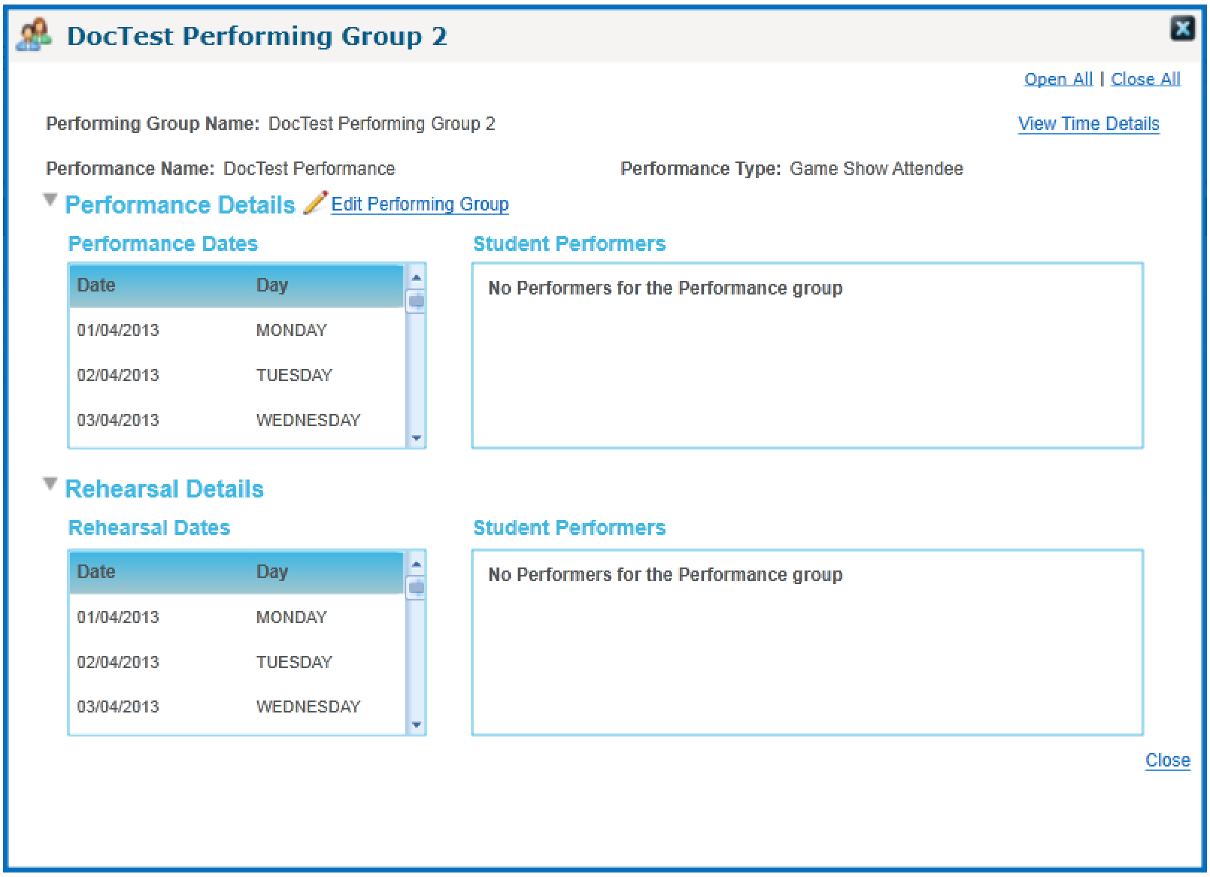


9. Enter the specific times for performances and rehearsals.
10. Click the **Save** button.

11. Click the **View Performing Group Details** hyperlink to view the group details.
12. If required, click the **Edit Performing Group** hyperlink to edit the **Rehearsal Details** in the same way.
13. Click the **Save** button.

Editing a Performing Group

1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Performance Schedule** tab to display a list of groups and their associated performance.
3. Click the **Group Name** for the performing group you wish to update to display the details in a dialog.



4. Click the **Edit Performing Group** hyperlink to enable editing.
5. Make the required changes to the performing group.
6. Click the **Save** button.

Deleting a Performing Group

A performing group can be deleted only if there are no active students associated with it.

1. Open the record for the employer whose details you want to edit. For more information, see Viewing Employer Details on page *67*.
2. Select the **Performance Schedule** tab to display a list of groups and their associated performance.

3. For the performing group you wish to delete, click the **Delete** hyperlink to display the **Delete Performing Group** dialog.
4. Click the **Yes** button to delete the group.

08 | Managing Reports

Overview

The Applications module provides 16 preconfigured Crystal reports relating to Children in Employment and Entertainment. The available reports are:

- Active Performance Report
- Applicant List
- CE_Employee_Employment_Card(Employee) report
- CE_Employee_Employment_Card(Employer) report
- Chaperone Licence
- Chaperone List (licenced) Report
- Chaperones & Students
- Employee List by Parent Company/Workplace
- Employer List
- Employer Covering Letter
- Licence Not Issued (by Applicant)
- Number of Employees by Employee Type
- Licences Issued (By school)
- Licences Issued (By Applicant)
- Performance Composite Licence Report
- Performance Individual Licence Report

Managing reports in CIEE is similar to managing reports in other areas of One v4 Online. For more information on using the reports functionality, refer to one of the following reference guides:

- RG_Online_Common_Reports
- RG_Online_Reports
- RG_Online_Reports (ATBO)

09 | Common Functionality

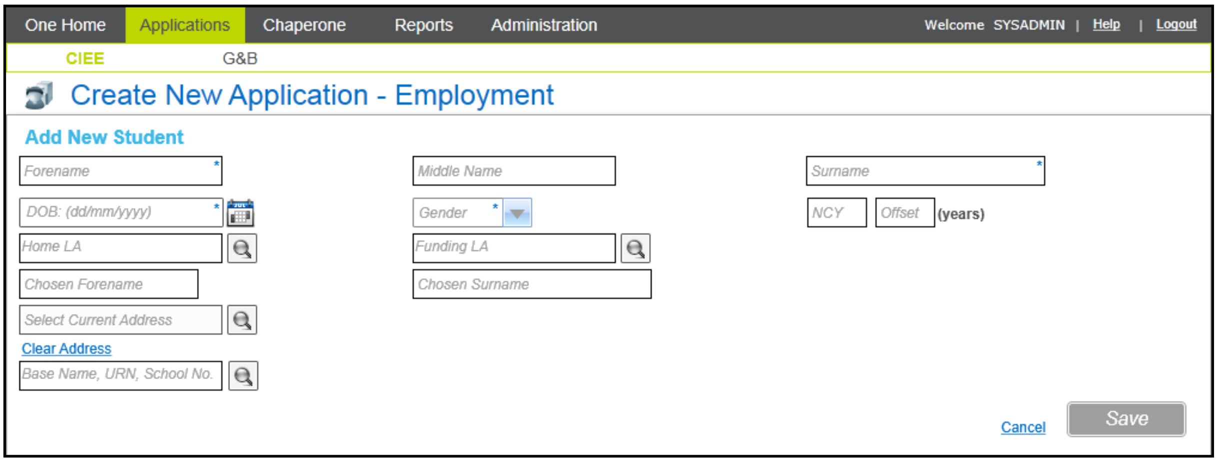
Introduction

For ease of use, wherever possible, the same or similar processes have been created regardless of the type of application that is being created. This chapter details processes that are similar across both the Children in Employment and Children in Entertainment areas.

Creating a New Student to Add to an Application

When creating an application, users with the correct permissions can add the details of a student who is not already in One.

1. From the **Create New Application** page, click the **Add New Student** hyperlink to display the **Add New Student** dialog.



2. Enter the details for the student. **Forename**, **Surname**, **DOB** and **Gender** are required fields.
3. Enter any additional details for the student.
4. Click the **Save** button to return to the **Create New Application** page.

Adding a Photo to a CIEE Application

If a student already has a photo associated with another application, One uses this photo when creating a new application. However, if no photo exists, you can add one. If you attach a photo to an application, One uses this photo in all applications for the student.

NOTE: *The photo must be in either .jpg or .png file format.*

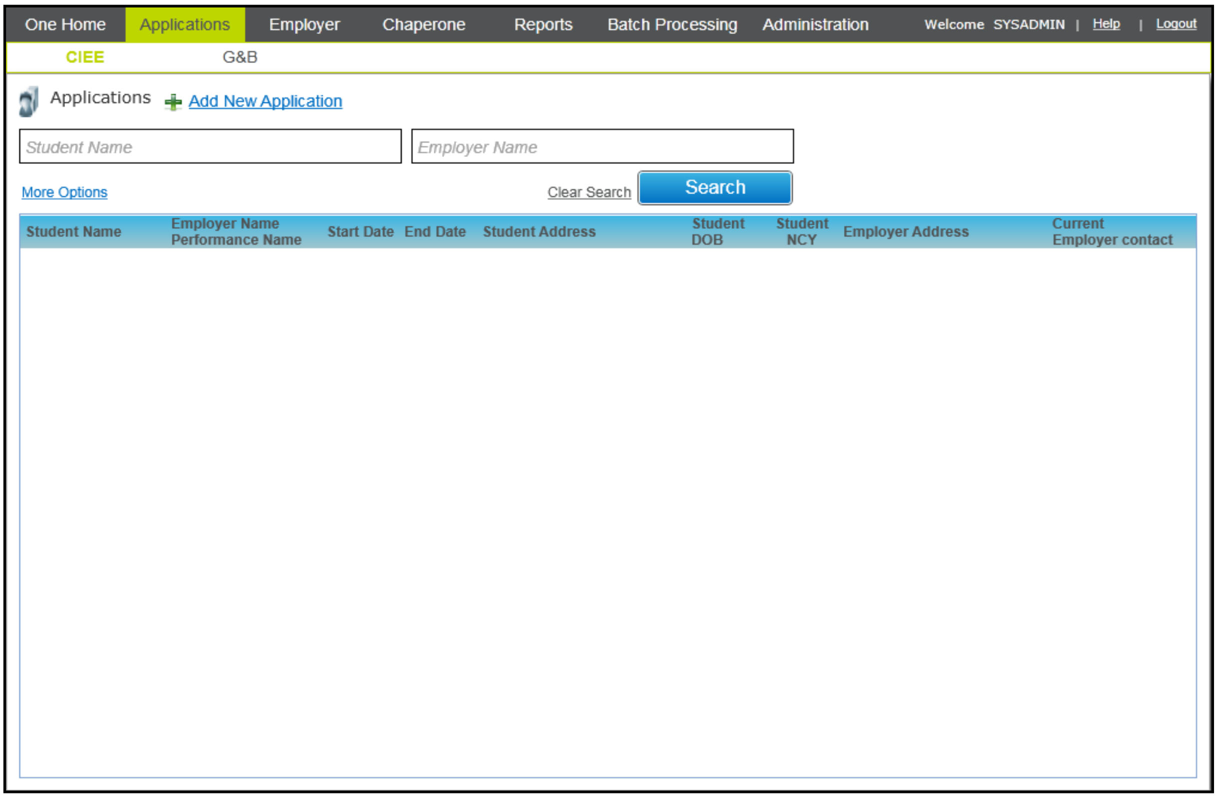
1. Open the required application. For more information, see Opening an Application on page *93*.
2. In the **Basic Details** tab, click the **Edit** hyperlink.
3. Click the **Add Photo** hyperlink to display the **Open** dialog.
4. Navigate to the location of the photo you would like to add to the student's record.
5. Click the **Open** button to upload the photo to the database.

You can click the **Change Photo** hyperlink to change the photo before saving the application. It is not possible to delete the photo until the application has been created.

Opening an Application

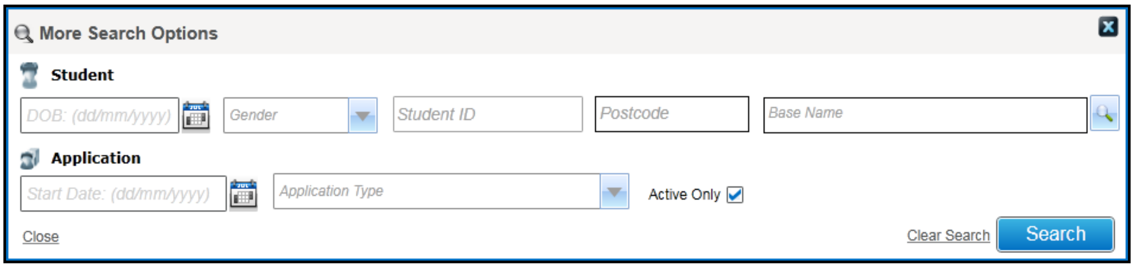
After creating an application, you can search for it using student details, employer name or application specific details.

1. From the One homepage, click the **Applications** button to display the **Applications** area.

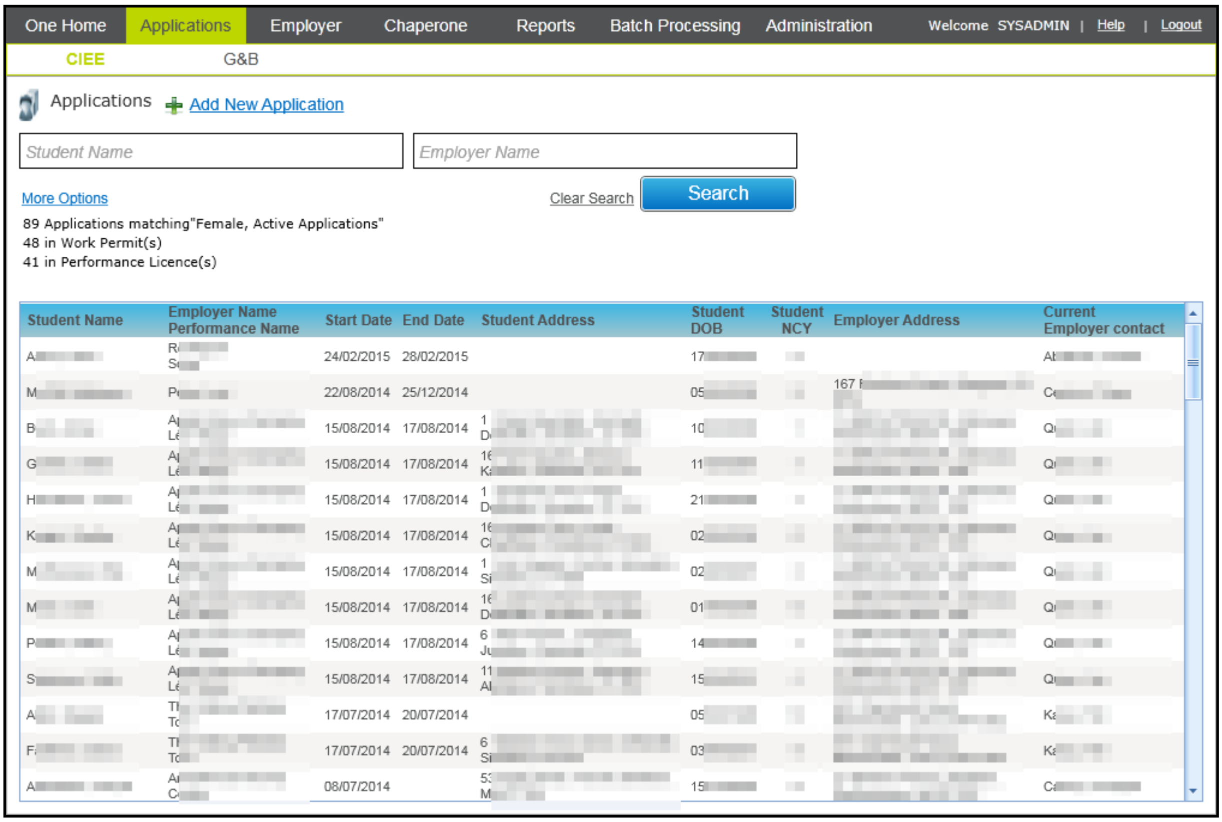


2. In the **Application** panel, ensure the **CIEE** page is selected and enter your search criteria.

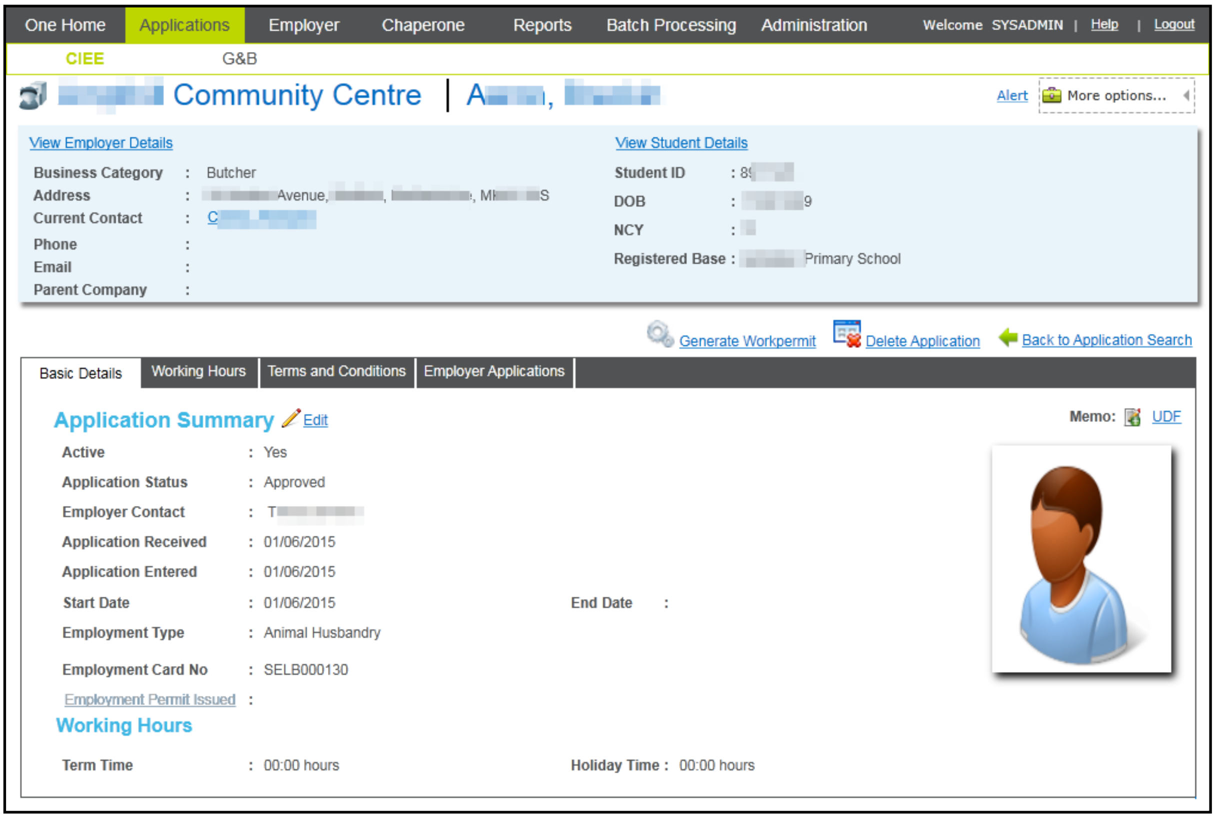
   To search using more specific student or application details, click the **More Options** hyperlink to display the **More Search Options** dialog.



3. Click the **Search** button to display a list of applications that meet the entered search criteria.



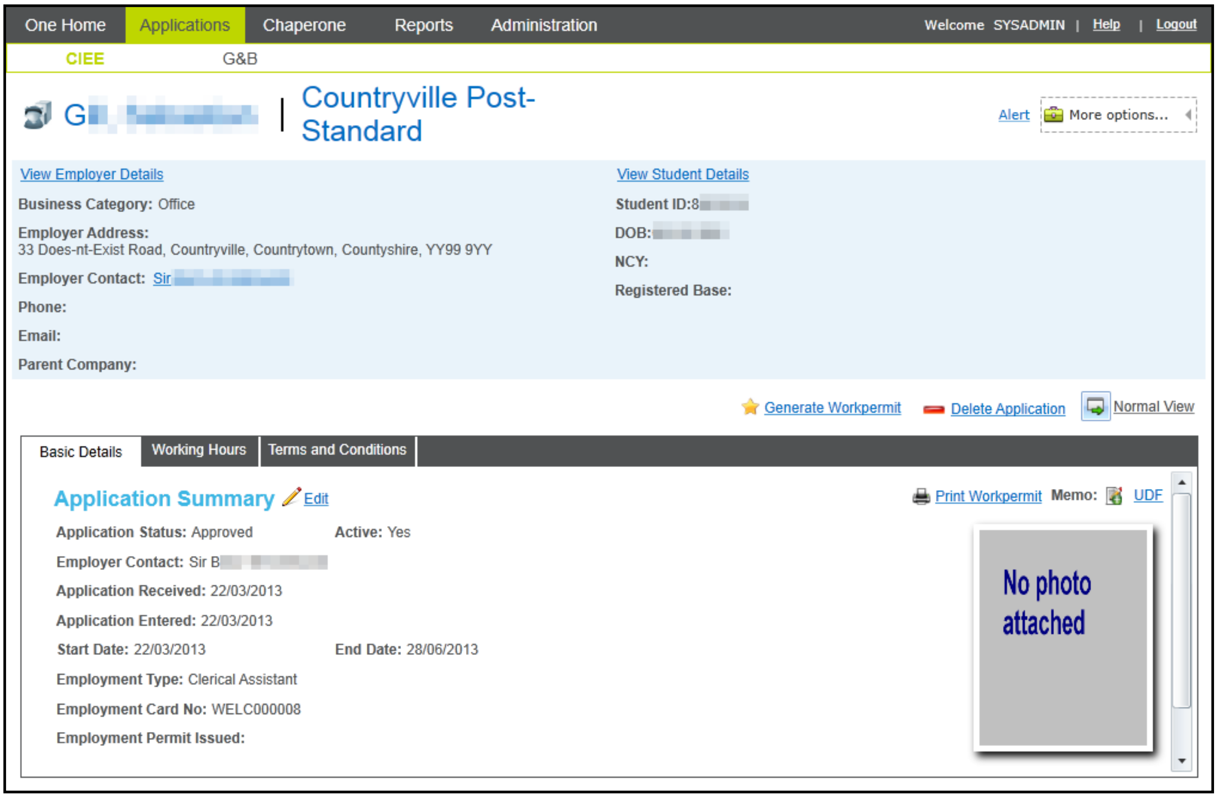
4. Click the required application to display its details.



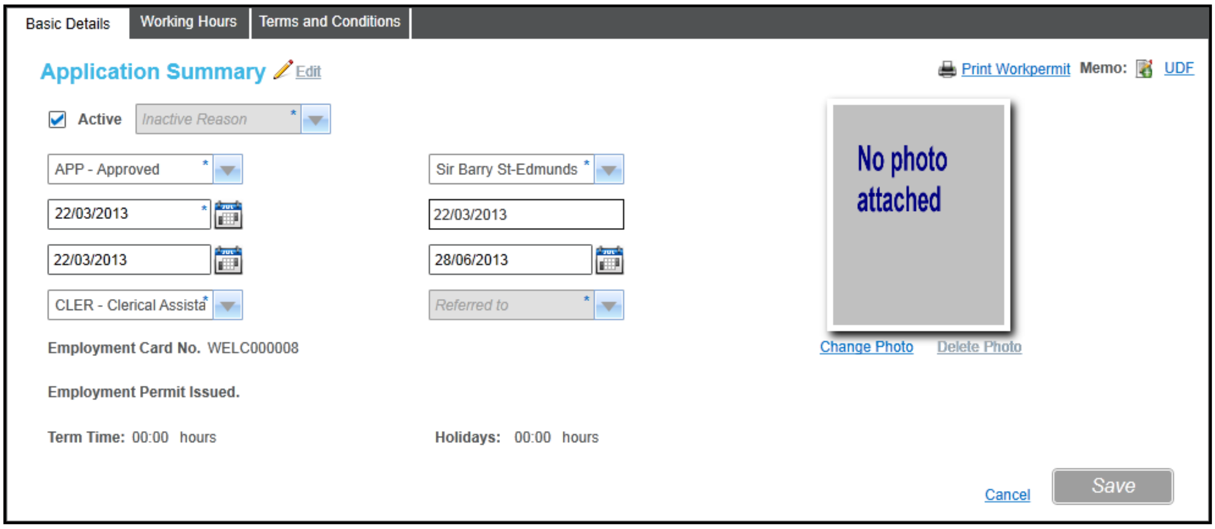
> ***TIP:** Click the **Back to Application Search** hyperlink to display the results of your last search without having to re-enter your search criteria.*
>
> *To view all the other applications for the employer associated with the currently open application, select the **Employer Applications** tab.*

Editing Basic Details

1. Open the application you wish to edit. For more information, see [Opening an Application](#) on page *93*.



2. In the **Basic Details** tab, click the **Edit** hyperlink in the **Application Summary** section to display editable fields relating to application details.



3. Make the required changes to the application details.
4. Click the **Save** button to record the changes.

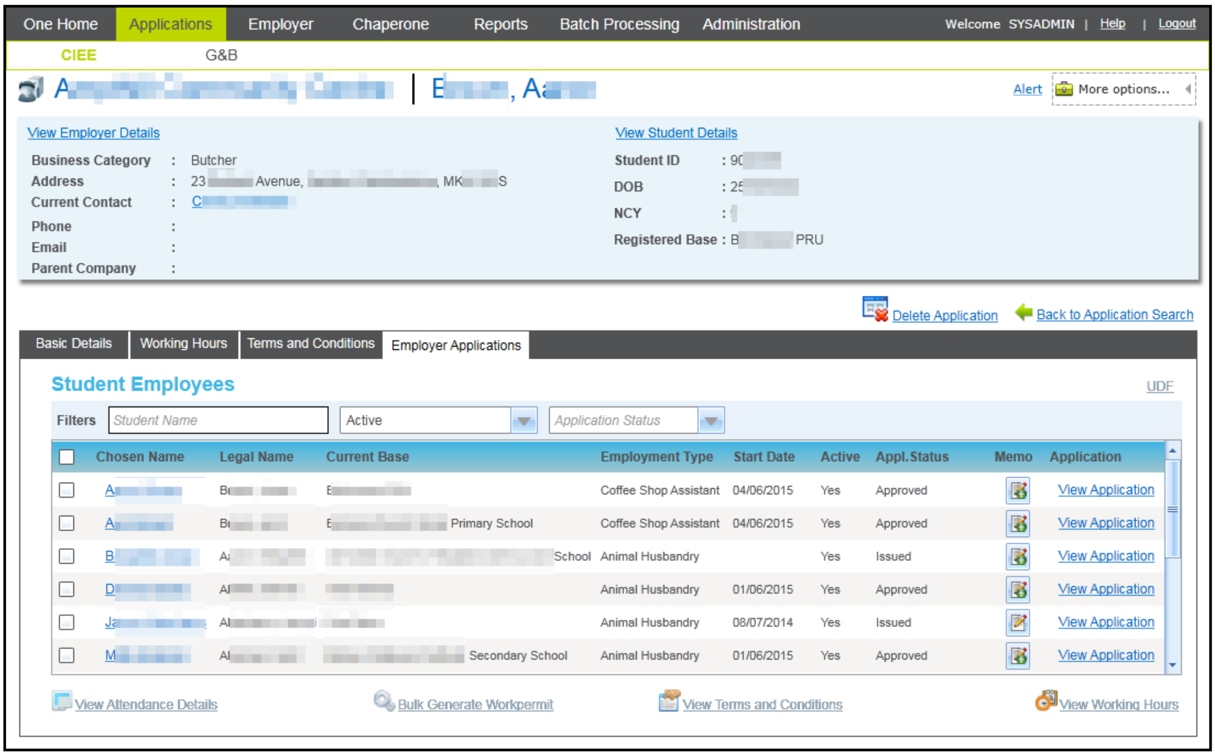
Generating Licences in Bulk

You can quickly view all the applications for an employer and then generate licences in bulk for that employer via the **Employer Applications** tab, available from within any application. One performs the standard validation checks for all the selected applications when you attempt to bulk generate licences, so you should ensure that all selected applications can pass validation before including them in a bulk licence operation.

***NOTE:** The following steps illustrate creating a workpermit. However, the process is the same when creating a performance licence.*

To generate licences in bulk:

1. Open any application associated with an employer for whom you want to bulk create licences. For more information, see Opening an Application on page *93*.
2. Select the **Employer Applications** tab to display all the applications for the current employer.



3. Review the details of the individual applications you wish to include in the bulk process. Click the **View Application** hyperlink against an application to edit its details.
4. Select the check box for each application for which you want to generate a workpermit/performance licence.
5. Click the **Bulk Generate Workpermit** hyperlink to display the **Select a Work Permit Report** dialog.
6. (Workpermit creation only) Select the required report and click the **Select** button.

   The workpermits/performance licences are generated.

Deleting an Application

If a student or employer's circumstances change and the application is no longer required and the related work permit or licence has not already been issued, the application can be deleted.

1. Open the application you wish to delete. For more information, see Opening an Application on page *93*.
2. Click the **Delete Application** hyperlink to display the **Delete Application** dialog.
3. Click the **Yes** button to delete the application and display the **Delete Application** confirmation dialog.
4. Click the **OK** button to return to the **Applications** home page.

One v4 Online Common Functionality

The One v4 Online version of G&B shares functionality with other One modules. For help using functionality shared with other modules, use the following resources.

- Alerts – *Managing Alerts* topic in the v4 Online help.
- Linked Reports – *Managing Linked Reports* topic in the v4 Online help.
- Linked Documents – *Linked Documents* topic in the v4 Online help.
- Communications Log - *Maintaining the Communications Log* topic in the v4 Online help.
- SQL Query Mail Merge – *Maintaining SQL Mail Merge* topic in the v4 Online help.

Index

adding
- chaperone check details ... 54
- chaperone interview details ... 55
- chaperone licence ... 58
- chaperone referee details ... 56
- employer ... 63, 65, 66
- employment inspection ... 75
- entertainment inspection ... 76
- new employer ... 63
- new student ... 92
- performance groups ... 27
- performance schedule ... 39
- performances ... 80
- performing group ... 83
- person as employer contact ... 74
- photograph to application ... 92
- predefined text to terms and conditions ... 6
- work permit report ... 6
- working hours to an application ... 13, 14, 15

alerts ... 97

application status
- editing
  - in employment application ... 21
  - in entertainment application ... 44
- understanding
  - in employment application ... 9
  - in entertainment application ... 34

applications
- adding photograph ... 92
- deleting ... 96
- editing basic details ... 95
- employment
  - adding working hours ... 13, 14, 15
  - creating ... 9, 10
  - editing authorisation details ... 18
  - editing terms and condtions ... 17
  - generating and printing ... 21
- entertainment
  - adding chaperone ... 42
  - adding performance schedule ... 39
  - creating ... 35
  - removing chaperone ... 43
- opening ... 93
- status ... 9, 34

authorisation details
- editing
  - in employment application ... 18

batch processing ... 46

chaperone licence
- creating ... 58
- deleting ... 60
- editing ... 60
- generating ... 59
- printing ... 59

chaperone licence, creating ... 58

chaperones
- active ... 60, 61
- active status ... 60
- adding detail ... 52
- adding to application ... 42
- creating licence ... 58
- deleting ... 61
- inactive ... 60, 61
- maintaining ... 49
- opening chaperone record ... 52
- registering ... 49
- removing from application ... 43

check details
- deleting ... 54
- editing ... 54
- recording ... 54

CIEE
- introduction ... 1
- overview ... 1

common functionality ... 92, 97

communications log ... 97

configuring
- children in employment
  - introduction ... 3
  - understanding defaults ... 3, 4
- children in entertainment
  - introduction ... 26
  - understanding defaults ... 26

contact person
- adding for employer ... 74
- viewing details ... 73

creating
- applications
  - employment ... 9
  - entertainment ... 34, 35
  - work permit ... 9
- chaperone licence ... 58
- chaperones ... 49
- employer ... 63, 65, 66
- employment inspection ... 75
- new employer ... 63
- new student ... 63
- performance groups ... 27
- performance schedule ... 39
- performances ... 80
- performing group ... 83
- venues ... 30, 32
- work permit ... 21

defaults
- employment ... 3
- licence condition ... 26
- report ... 26
- understanding entertainment ... 26
- work permit conditions ... 4
- work permit reports ... 4

deleting
- applications ... 96
- chaperone ... 61
- chaperone check details ... 54
- chaperone interview record ... 56
- chaperone licence ... 60
- employer ... 71

inspection ... 78
performance group ... 29
performance schedules ... 41
performances ... 83
performing group ... 89
predefined text from terms and condtions ... 8
venues ... 33
work permit report ... 6
editing
application status
in employment application ... 21
in entertainment application ... 44
chaperone check details ... 54
chaperone interview record ... 56
chaperone licence ... 60
chaperone referee details ... 58
employer details ... 69
entertainment defaults ... 26
inspection ... 78
licence conditions ... 43
performance groups ... 29
performances ... 82
performing group ... 89
predefined text for terms and conditions ... 7
terms and conditions ... 17
in employment application ... 17
venues ... 33
workig hours ... 16
employer contact
adding a person as ... 74
employer details
creating new ... 63, 65, 66
deleting ... 71
introduction ... 63
viewing ... 67, 69
employment inspection
adding/recording ... 75
deleting ... 78
editing ... 78
viewing ... 78
entertainment defaults, editing ... 26
entertainment details, viewing ... 61
entertainment inspection
adding/recording ... 76
deleting ... 78
editing ... 78
viewing ... 78
generating
chaperone licence ... 59
licences ... 45
work permit ... 21
interview details
deleting ... 56
editing ... 56
recording ... 55
licence conditions
editing ... 43
linked documents ... 97
linked reports ... 97
managing
performance groups ... 27
reports ... 91
venues ... 30
module
introduction ... 1
overview ... 1
new employer, creating ... 63
new student, creating ... 63
opening
chaperone record ... 52
performance groups
creating ... 27
deleting ... 29
editing ... 29
managing ... 27
removing student from ... 29
performance schedule
adding ... 39
deleting ... 41
performances
adding ... 80
deleting ... 83
editing ... 82
viewing ... 80
performances list
adding to ... 80
deleting from ... 83
performances, setting up schedule ... 85
performing group
adding ... 83
deleting ... 89
editing ... 89
setting performance and rehearsal schedules ... 85
permissions ... 2
photograph, adding to application ... 92
predfined text
adding to terms and conditions ... 6
deleting predefined text from terms and conditions ... 8
editing in terms and conditions ... 7
printing
licence ... 45
work permit ... 21
recording
chaperone check details ... 54
chaperone interview details ... 54
chaperone referee details ... 56
employment inspection ... 75
entertainment inspection ... 76
referee details
adding ... 56
deleting ... 58
editing ... 58
registering chaperones ... 49
rehearsals, setting up schedule ... 85
removing
chaperone from application ... 43
work permit report ... 6
revising

working hours 16
scheduling, performances and rehearsals 85
school attendance details.......................... 19, 20
sql query mail merge....................................... 97
Status Codes
Employment.. 9
student employees list, viewing........................ 79
student performer list, viewing 79
students
attendance records................................. 19, 20
removing from performance group 29
terms and conditions
adding predefined text 6
deleting predefined text 8
editing in employment application 17
editing predefined text 7
understanding
status codes
employment 9
updating
multiple applications 46
venues
adding 30, 32
deleting 33
editing 33
managing 30
viewing
application... 93
employer details 67
entertainment details 61
inspection.. 78
performances.. 80
performances list 80
school attendance details........................ 19, 20
work permit
adding report 6
removing report 6
working hours
adding to employment application 13, 14, 15
revising 16