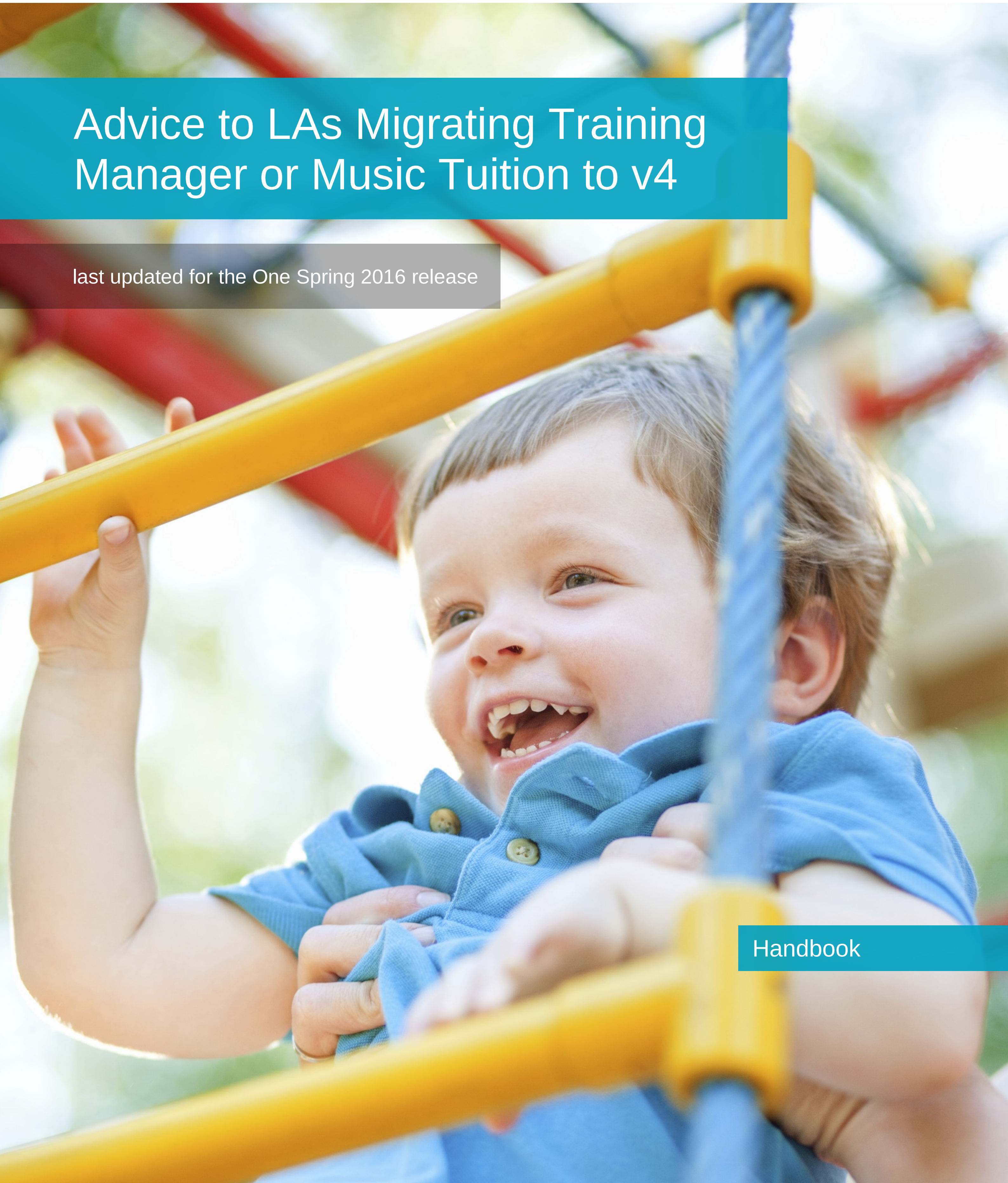
Advice to LAs Migrating Training Manager or Music Tuition to v4

last updated for the One Spring 2016 release



Handbook

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Advice to LAs Migrating Training Manager or Music Tuition to v4/One Spring 2016/2016-04-18

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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

This document has been written for One Co-ordinators and Business System Administrators managing the migration of Training Manager (including Training Manager Online) v3 to v4 or Music Tuition v3 to v4.

All of these areas are covered in one document because there is a considerable overlap between the Training Manager v4 and Music Tuition v4 solutions.

> ***Note for Music Tuition users:*** *In v4 the recording of music tuition events is managed via Training Manager courses and sessions. This is very different from v3. Therefore this document begins with information related to Training Manager. Specific advice for Music Tuition users is incorporated into this document. Existing student tuition records in v3 will not be migrated to v4. New tuition records should be added via v4 using a training course which is associated with the Music Training Unit. LAs can migrate gradually to v4.*
>
> *For more information, see* Migrating Your System to v4 *on page* 39

This document provides an overview of the changes introduced and the key points to consider as well as stepping you through the migration process.

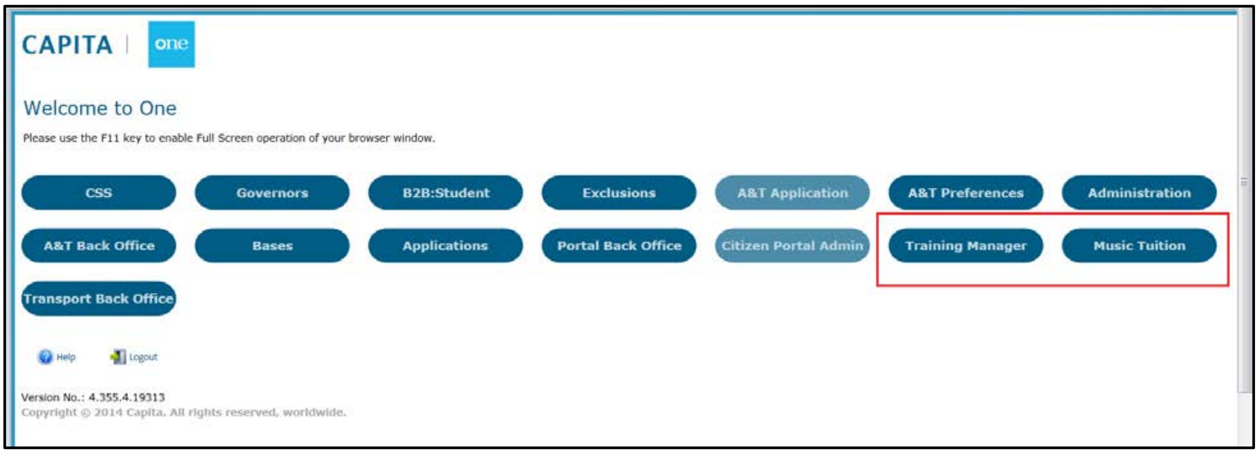
In addition to this migration document, there is detailed help information available when using the Training Manager v4 and Music Tuition v4 modules and also detailed handbooks for each area.

> **More Information:**
>
> *One Training Manager v4* handbook
> *One Music Tuition v4* handbook
> *One Training Manager Courses Provider Portal* handbook
> *One Training Manager Courses Citizen Portal* handbook
>
> For information regarding configuring the Provider Portal, refer to the *Deploying and Configuring the One Provider Self Service Portal for Local Authorities* technical guide.
>
> For information regarding configuring the Citizen Portal, refer to the *Deploying and Configuring the One Citizen Self Service Portal for Local Authorities* technical guide.
>
> These are available on the One Publications website (www.onepublications.com).

02 | Highlights of Managing Training Courses in v4

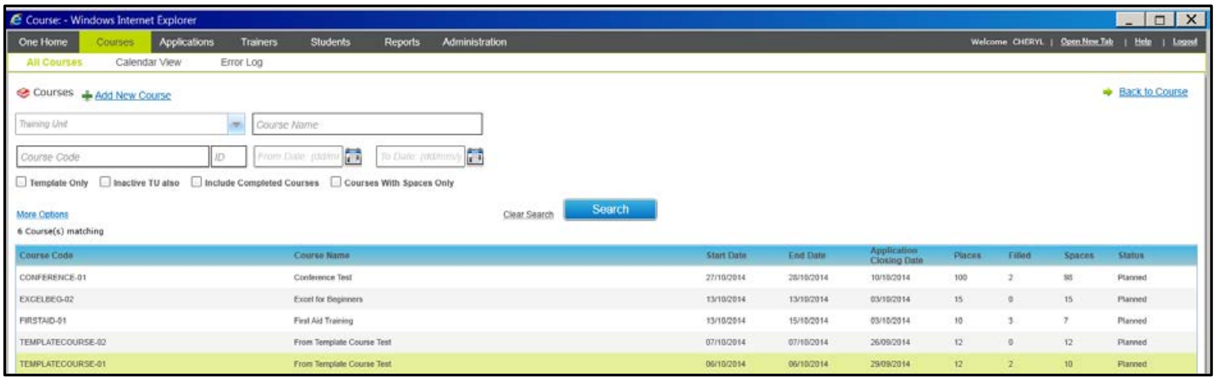
Browser-based module, ability to migrate Training Manager Training Units independently

Users access the new browser-based Training Manager and Music Tuition modules using new lozenges in v4 Online. The following graphic shows an example launch screen from v4 Online with the relevant icons highlighted:



In order to access these new areas, One Coordinators need to obtain v4 licence keys. As is the case with other migrated modules, System Administrators need to assign permissions for use of these areas of v4 because access rights are independent of v3 permissions.

The Training Manager and Music Tuition modules share a common look and feel with other v4 Online modules such as Admissions & Transfers Back Office, Bases and Applications. They include the ability to open multiple tabs within one login session in order to deal with enquiries without navigating away from your current task. The following graphic shows an example of the default landing page of both modules which is the Course Search (with some example course results shown):



> ***Note for Training Manager users:*** *Local Authorities can choose to migrate Training Units individually from v3 into v4 over time (enabling One Support teams to manage their support work more easily), or migrate all Training Units at once. Once a Training Unit has been migrated to v4 and new courses have been created in v4, it will not be possible to access these new courses in v3.*

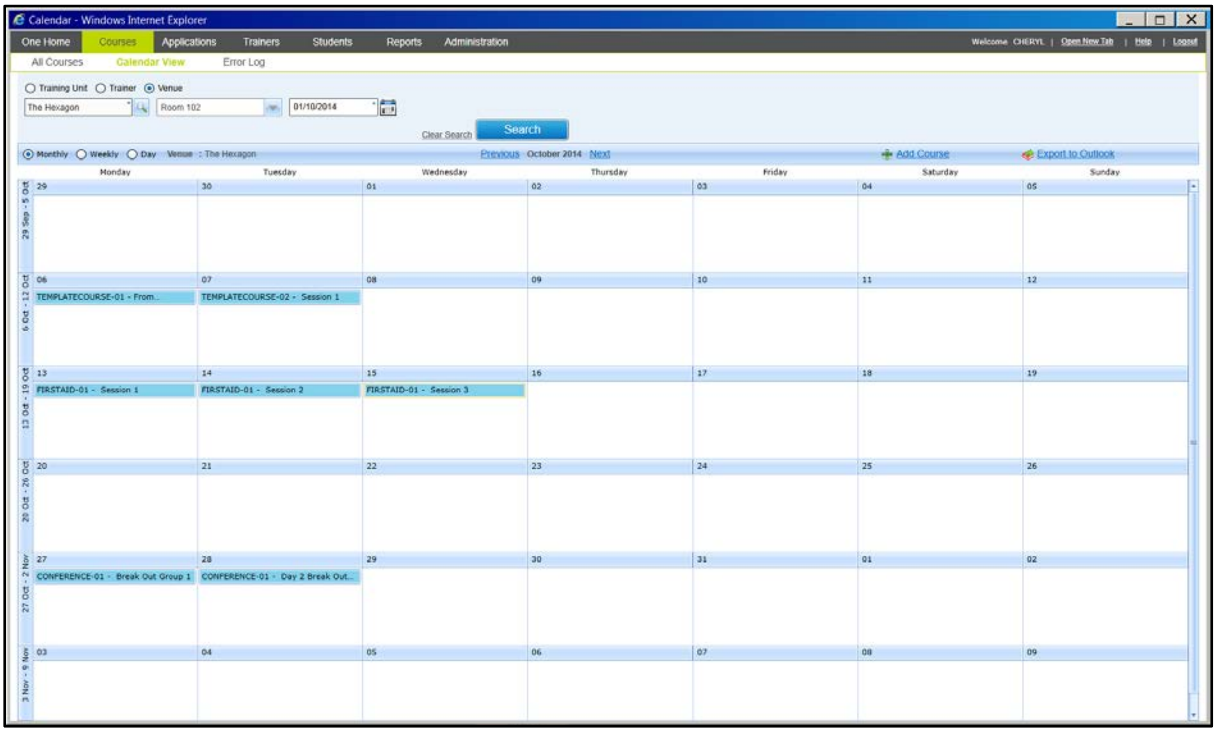
All key processes are supported in v4 including Course, Application and Trainer management as well as a **Reports** focus and **Administration** area for set up. Within Music Tuition, management of the Instrument Inventory and Ensembles and their membership is supported.

Summary of Enhancements Related to Managing Training Courses

Training Manager v4 and Music Tuition v4 incorporate the following significant enhancements compared to the processes for managing training events in v3:

Course Management

- Course attendees can be assigned to specific sessions and their attendance monitored for each session (including recording reasons for non-attendance).
- Multiple sessions for a selected course can have the same start date and time, enabling your LA to better support conferences and other simultaneous training events.
- Improved features for setting up session dates including recurrences every *n* days and on specific weekdays. This is likely to be useful when setting up Music Tuition events.
- There is a new Course Calendar view enabling easy monitoring of trainer and venue utilisation within a selected month by selecting a Training Unit, Trainer or Venue (and optionally Room). This information can be exported to Outlook and emailed to Trainers or Venue Managers.

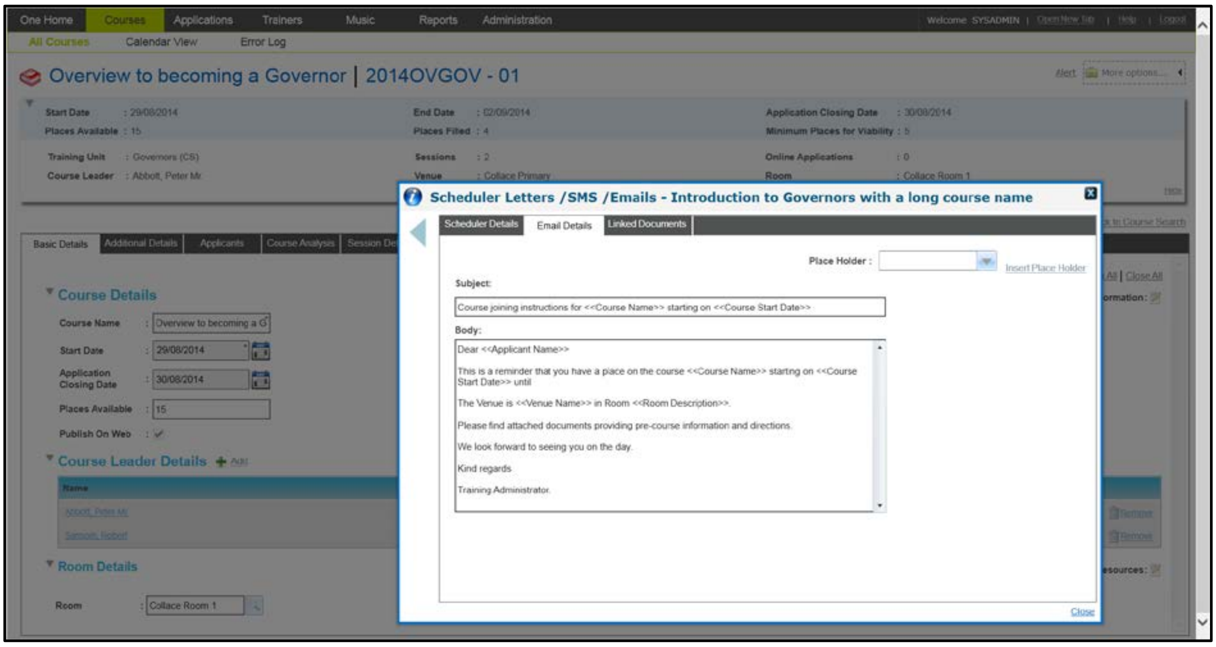


- Courses are now set up without reference to a financial year (unlike v3 Training Manager). Instead users can search for courses within a date range. There is no longer a need for users to restrict training courses to discrete financial years in v4. Courses can run across different financial years without any need for additional administrative tasks such as transferring the same course to the new financial year, setting-up the same course over and over again for each financial year etc. Music courses can now be setup to run across financial years and can be created with any start or end date with no restrictions.

- The **Course Code** has been extended to 15 characters (it is recommended that your LA includes the year as a prefix or suffix to the main course code).
- A course can be linked to any number of activities or targets set up in the Education Plan Monitoring module.
- Courses can be deleted if they have been entered in error.

Course Applications

- Emails with multiple linked documents (such as pre-course joining instructions and directions) can be scheduled to be sent to course applicants. Emails can be tailored to your requirements and include 'place holders' for key information such as the **Course Name, Course Dates, Applicant Name** and **Venue.**



- SMS text messages can be scheduled to be sent to course applicants via the 3rd party SMS text messaging provider FastSMS (www.fastsms.co.uk). Each text sent incurs a cost paid to the 3rd party SMS text provider. If your LA uses another SMS text messaging provider and you would like the Training Manager application SMS texts to be sent using that, please discuss this with your Account Manager.
- Scheduled Email and SMS communications are automatically logged in a communication log for the Training Unit which can be filtered by **Recipient, Dates, Type** and **Summary**.
- There is a Scheduled Communication error log to capture any problems with sending emails or SMS texts including the ability to re-send.
- As well as the standard application information captured, an **Additional Questions** tab is available for locally-configured questions. Templates for additional questions can be set up at the Training Unit or course template level and further modified if required at the individual course level. The Training Manager v3 fields for storing special applicant needs have been replaced by the **Additional Questions** area which offers more flexibility. LAs can set up a wide array of response types including text, paragraph, configurable lookup options, date, number, check boxes and radio buttons.
- When adding applicants to a course, you can use either the person search facility (which, as per v3 includes the options to search by base, on employees or on governors as well as by role) or student search facility, subject to user permissions. For Music Tuition events, the default applicant type is Student and for other Training Units the default applicant type is

Person. As in Training Manager v3, reservations can also be recorded for a Base (e.g. a School or LA department) for as yet un-named applicants for any Training Unit courses other than the Music Training Unit.

- For any Training Unit other than the Music Training Unit, it is possible to capture minimal details for an applicant without adding them to the people database within One, assuming there is no need to match the person and maintain a history of their application in the long term. This is achieved by adding the applicant via the **Add Individual** option.

Trainers

Improved recording of information related to the Trainer, including Subjects Taught and Qualifications, Checks, Training History and Observations. These features are inherited from the Music Tuition module and are now shared with Training Manager.

Training Units

Training Units can now be marked as inactive. Inactive Training Units will be excluded from course searches by default, although there is an option to search for courses associated with an inactive Training Unit.

Finance

A new approach to managing course finances provides a more sophisticated means of managing financial transactions.

More Information: *Finance* on page *20*

03 | Overview of Navigation and Process Mapping

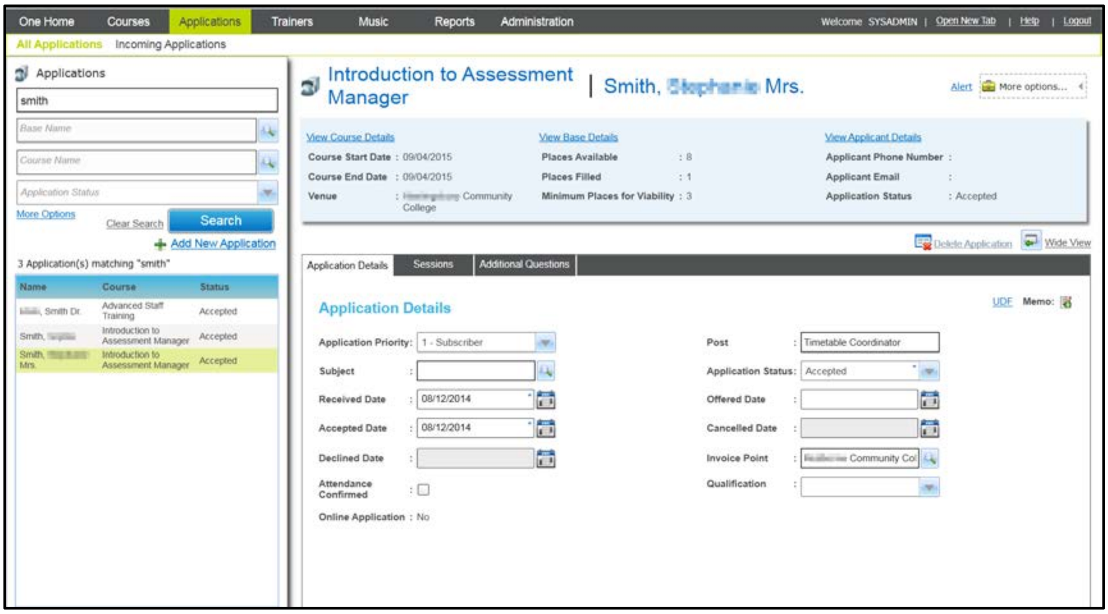
Overview of Navigation

When selecting the **Training Manager** or **Music Tuition** lozenge from the v4 Online launch page you are navigated to the **Course Search** screen by default.

You can navigate through the system by selecting from a series of options presented horizontally. For each primary level navigation option there is a default secondary option and other secondary options.

The primary level navigation options depend upon your access rights and whether you have access to the Music Training Unit. These are **Courses**, **Applications**, **Trainers**, **Music** (or, if you do not have access to the training unit then **Students**), **Reports** and **Administration**.

For most of the key screens, a search area is presented on the left hand side of the screen. Some default search options are displayed and also more search options may be available via a **More Options** link. The search results are listed on the left along with an indication of the criteria used to carry out the search. The following graphic shows an example of the **Applications** focus where a search has been carried out on **Applicant** name of **Smith**:



Once an entity (e.g. Course, Application or Trainer) has been selected, then a summary of key details for that entity is presented in the top right side of the screen.

Underneath the summary, further details and options are available, depending on the user's access rights. In some areas these are presented as a series of tabs to organise the information. If the user has read-write permission to the business area, then they will generally be placed directly into edit mode within the details section.

Where some information is displayed in the details section that may be more easily viewed on a wider screen, then a **Wide View** option is provided so that the search panel can be temporarily hidden to make the most of the horizontal space available.

A Cleaner Interface where Users only see Information Relating to their Individual Business Processes

The general principle of Training Manager and Music Tuition in v4 is that if a user does not have permission to read information in a particular area, or does not have permission to run a routine, then the information or process button will not be visible to them. This ensures that the user sees information relevant to their individual business processes only.

High-Level Mapping of v3 to v4 Key Processes

The following is a high level mapping of v3 to v4 key processes for Training Manager and Music Tuition. Unless otherwise stated, the v4 equivalent is available for both Training Manager and Music Tuition v4 modules.

Business Process	V3 area	V4 equivalent	Notes
Managing Training Events & Applications in the Back Office			
Adding a new Course	Training Manager | Courses | Add	Courses | All Courses | Add New Course	In v4, **Courses | All Courses | Course Search** is the default landing point for a user.
Adding a new Course Template	Training Manager | Tools | Module Administration | Course Templates | Add Template	Courses | All Courses | Add New Course | Save as Template	One v4 merges Courses and Course Templates set up via the Courses focus. Once basic details are entered, you can save as a Course or a Template.
Creating a Course from a Template	Training Manager | Courses | Add | Cloned from an existing template	Courses | Select 'Template Only' and Search | Select Template | Create Course from Template	
Selecting Courses by Financial Year	Training Manager | Courses | Selection | Financial Year	Option not available in v4.	Users are no longer required to create and use financial years in v4. Courses can be created and maintained for any period of time and users have the option to allow them to overlap across fiscal periods without any restrictions.
Deleting a Course	Function unavailable in v3	Courses | Select a Course | Delete Course	Courses can be deleted in v4 as long as there are no applicants associated with the course.
Calendar view of Courses by Training Unit, Trainer, Venue or Room	Function unavailable in v3	Courses | Calendar View	Users are able to search for courses in any given month by filtering by Training Unit, Trainer or Venue/Room. This is helpful to gain an overview of Trainer or Venue utilisation. It is also possible to export and email the calendar (e.g. to a Trainer or Venue Manager) as an Outlook file which can be imported to display on an individual's Outlook calendar.

Business Process	V3 area	V4 equivalent	Notes
Course Catering	Training Manager | Courses | Details | Catering	Not migrated to v4	Catering information has not been migrated to v4. On the v4 **Courses | Details | Basic Details** tab there is a **Resources Memo** that could potentially be used to store required information. UDFs are available from the Additional Details tab.
Course Equipment	Training Manager | Courses | Details | Resources	Not migrated to v4	The v3 Equipment Required area has not been migrated to v4. On the v4 **Courses | Details | Basic Details** tab there is a **Resources Memo** that could be used to store required information. UDFs are available from the **Additional Details** tab.
Adding Session Details to Courses	Training Manager | Courses | Details | Sessions | Add	Courses | Session Details | Add	One v4 enables users to add sessions that run concurrently. There are improved features for setting up multiple sessions including recording recurring sessions (e.g. on specific weekdays) - useful for setting up music tuition for example. Unlike v3, when adding a course no sessions are created automatically.
Associating Applicants with Sessions and recording attendance for Sessions	Not possible to associate an applicant with a session other than via noting attendance.	Courses | Session Details | Attendance	Applicants can be booked onto sessions prior to the course and then their attendance (including reason for non-attendance) recorded.

Business Process	V3 area	V4 equivalent	Notes
Adding a new Application	Training Manager | Courses | Applications	Applications | Add New Application Courses | Select Course | Applicants | Add New Application	In v4, this functionality can be accessed via the **Applications** focus as well as the **Courses** focus. Users can search for an existing course and then add applicants by searching for either a person or a student record and adding them as an applicant. For non-music training units, users can also add reservations for bases or add applicants as individuals (without matching them to a One person). Note on recording applications: When recording a course application in v4, the **Application Status** must be manually selected, which then causes the linked **Date** to be set to today's date. For example, if you wish to create an accepted application, set the **Application Status** to **Accepted** and the **Accepted Date** will be set to today's date. This can be edited. This is different from Training Manager v3 where, the relevant date field was manually populated in order for the Application Status to be calculated.
Searching for an application by Base	Training Manager | Applicants by Base | Select Base | Search	Applications | Select Base | Search	In v4 there is not a separate **Applicants by Base** focus.
Applicant Courses focus in v3	Training Manager | Applicant Courses	Applications	A new application can be added via the **Applications** focus. To access the applicant's personal details and the applicant's full list of courses, select any application for that person and select the **View Applicant Details** option.

Business Process	V3 area	V4 equivalent	Notes
Managing Additional Questions for applicants to answer as part of their application	Function unavailable in v3.	Administration | Training Unit | Select a Training Unit | Additional Questions Courses | Select Course or Template | Additional Questions	One v4 enables LAs to create additional application questions. Questions can be configured for Training Units, Templates and Courses. Questions set up at the Training Unit or Template level automatically cascade to associated new courses. Questions can then be amended for individual courses if required. This replaces the Applicant Needs functionality in v3.
Transfer Applications between courses	Training Manager | Courses | Select a Course | Applicants | Select Applicant(s) | Process Applicants | Transfer	Courses | Select a Course | Applicants | Select Applicant(s) | Process Applications | Transfer Applications | Select an Application | More Options | Transfer Application	An Application can be transferred from one Course to another via both the **Courses** and the **Applications** focus.
Transfer a Course between Training Units	Training Manager | Module Administration | Training Units | Training Unit Courses | Select a Course | Move | Select Training Unit	Courses | v4 | Courses | Select a Course | More Options | Transfer Course | Select Training Unit	

Business Process	V3 area	V4 equivalent	Notes
Adding a new Scheduled Communication	Training Manager | Courses | Select a Course | Details | Scheduled Letters | Letter (or) E-mail Tools | Module Administration | Training Units | Set Scheduled Letter Defaults Tools | Module Administration | Course Templates | Set Scheduled Letter Defaults	Courses | Select a Course | More Options | Scheduler | Add New Scheduler | Letter (or) E-mail Administration | Training Units | Basic Details | Letter Defaults | Add Courses | Search and select a Template or Add a new Template | More Options | Scheduler	In v4 default scheduled communications (e.g. to send *n* days before a **Course Start Date**, or *n* days after a **Course End Date**, or to be triggered when an application's status is updated) can be set up at the training unit or course template level and then they will be automatically inherited by courses within that training unit, or cloned from that template. Email facilities have been improved considerably in v4. Email text can be configured including placeholders to mail merge data from the course or application. Linked documents (e.g. venue directions or pre-course information) can be sent with emails. SMS functionality - v4 enables users to also set up and send automated text messages as scheduled reminders for applicants. This uses a 3rd party SMS service that is charged per SMS. Scheduled emails and SMS messages are automatically recorded in the training unit's Communication Log. Scheduled letters (based on Crystal reports) can also be set up, including to be sent as emails also (where the email is sent with the generated Crystal report attached). **NOTE:** Scheduled communications in v4 replace the v3 facility to print letters from the **Process Applicants** area as the application status is updated.
Pre-Course Letters	Training Manager | Tools | Routines | Pre-Course Letters	Scheduled Communications (see above)	The v3 Pre-Course Letters routine has been replaced by scheduled communications in v4.

Business Process	V3 area	V4 equivalent	Notes
Adding Linked Documents to Courses and Applications	Courses | Select a Course |Linked Files Courses | Applications | Linked Files	Courses | Select a Course | More Options | Linked Documents | New v4 | Applications | More Options | Linked Documents | New	
Administration / Set Up			
Managing Venues	Training Manager | Tools | Module Administration | Venues	Administration | Venues	
Managing Organisations	Training Manager | Tools | Module Administration | Organisations	Administration | Organisation	
Managing Training Units	Training Manager | Tools | Module Administration | Training Units	Administration | Training Unit	
Managing Lookups (User Codes)	Training Manager / Music Tuition | Tools | Module Administration | User Codes	v4 Client | Tools | Administration | Lookups	Lookup codes are set up via v4 Client rather than via the v4 Online interface from which Training Manager and Music Tuition back office products are launched.
Finance			

Business Process	V3 area	V4 equivalent	Notes
Generating Invoices within Training Manager for Course Applications	Training Manager | Courses | Applications | Process Applicants | Generate Invoices Training Manager | Tools | Routines | Invoice by Base(s)	**From One Autumn 2014 Release (3.55)**: Courses | Select a Course | More Options | Billing | Select Sales Order Transactions | Generate Invoices Applications | Select an Application | More Options | Billing **From One Spring 2015 Release (3.56) only:** A Linked Transactions option from the Application. Also, a new routine, Administration | Bulk Applications Invoicing	In the One Autumn 2014 Release (3.55), in order to generate invoices for a specific course in v4, it is necessary to first create Sales Order transactions for those applications via the Course's **Billing** area. Then, select one or more Sales Order transactions and use the **Generate Invoices** option. This has the effect of updating the transactions to Sales Invoices and, if an Invoice Report is associated with the Training Unit, then there is the option to generate and print invoices. In 3.55 there is no automatic creation of Sales Order transactions. Enhancements are planned in the 3.56 release to streamline the processes related to financial transactions including the automatic creation of Sales Order transactions for accepted applications in some scenarios. Also in 3.56 the **Bulk Applications Invoicing** routine will be available in v4 which is the equivalent of the v3 **Invoice by Base(s)** routine.
Managing Claims from Trainers, Venues etc	Training Manager | Courses | Claims	Courses | Select a Course | More Options | Billing	Purchase Order and Purchase Invoice transactions can be used in v4 to reflect payments to Venues, Caterers or Trainers etc.
Course Costings	Training Manager | Courses | Details | Costings	Courses | Select a Course | More Options | Billing |	Purchase Order and Purchase Invoice transactions can be used in v4 to reflect payments to Venues, Caterers or Trainers etc.
Back Office work related to Training Manager Online			
Set up of Online Parameters	Training Manager | Tools | Module Administration | Online Parameters	Training Manager | Administration | Training Unit | Select a Training Unit | Online Defaults	In v4, different Online options can be configured for different training units.

Business Process	V3 area	V4 equivalent	Notes
Importing Applications created from an Online Portal	Training Manager | Web Applications	Training Manager | Applications | Incoming Applications	
Music Tuition specific processes			
Managing Music Tuition	Music Tuition | Students | Tuition	Courses | Applicants Applications	In v4, student tuition is managed via Training Manager style courses and applications within the Music Training Unit. Recurring sessions can be set up easily to represent regular music lessons. This is very different from v3.

Business Process	V3 area	V4 equivalent	Notes
Managing Instruments	Music Tuition | Instruments	Music Tuition | Music | Instruments	**Note on Instrument Status.** One v4 supports a restricted list of instrument statuses compared to a locally-configurable list in v3. One v4 supports the following statuses only: **In Stock**, **Hired**, **Repair** and **Withdrawn**. If an instrument with a different status is migrated from v3, it is possible to edit its status to one of the supported values via v4. **Instrument Hire Start Date and Delivery Date:** One v3 provides fields to capture **Start Date** and **Delivery Date** individually. In v3, the delivery date is used for billing and must be entered before invoices can be generated. Only when a delivery date has been entered is the instrument status updated to display **Hired**. These fields have now been merged in v4 and the **Start Date** should be used as the start date for charging. In v4, **Start Date** will revise the status of the instrument to **Hired**, unlike in v3 where delivery date does this. In v3, start date has fairly minimal role which has been broadened in v4. **Instrument Hire End Date and Return Date:** The **End Date** and **Return Date** fields in v3 have been amended to **Return Date** and **Actual Return Date** in v4 respectively to ensure they reflect their actual purpose. **Instrument Hire - Migration of data structures:** In terms of migration of data, there are no changes in table structures with the instrument hire details. So any data in v3 including the delivery date fields are retained in v4 and can be generated as a report if required.
Managing Ensembles and Membership	Music Tuition | Ensembles	Music Tuition | Music | Ensembles	

Business Process	V3 area	V4 equivalent	Notes
Managing Students	Music Tuition | Students	Music Tuition | Music | All Students	This v4 area defaults to a search of existing Music Students only, although this filter can be changed. Once a student has been selected, in addition to student personal information, there is access to a list of courses, ensembles and instruments hired that are associated with this student as well as a read-only view of music related results attained. The user is no longer able to manually add a result in v4 Music Tuition. Instead, this process has to be managed in the v4 Client via **Results Organiser**. For more information, see *Music Grades Results - Adding Results in v4* on page *19*.
Music Staff Management	Music Tuition | Staff	Trainers	In v4, this area is restricted to managing Music Tutors and Course Leaders. This area enables users to maintain information relating to Training History, Subjects Taught, Qualifications and Checks. Users will no longer be able to record this information for other role types such as music observers, as was the case in v3.
Invoices and Financial transactions			Finances are managed very differently in v4 via transactions that are associated with nominal ledgers and invoice points. One v3 Sponsors will be migrated as invoice points in v4. Transactions can be accessed via the Course, Application, Instrument, Ensemble, Nominal Ledger and Invoice Point.

Music Grades Results - Adding Results in v4

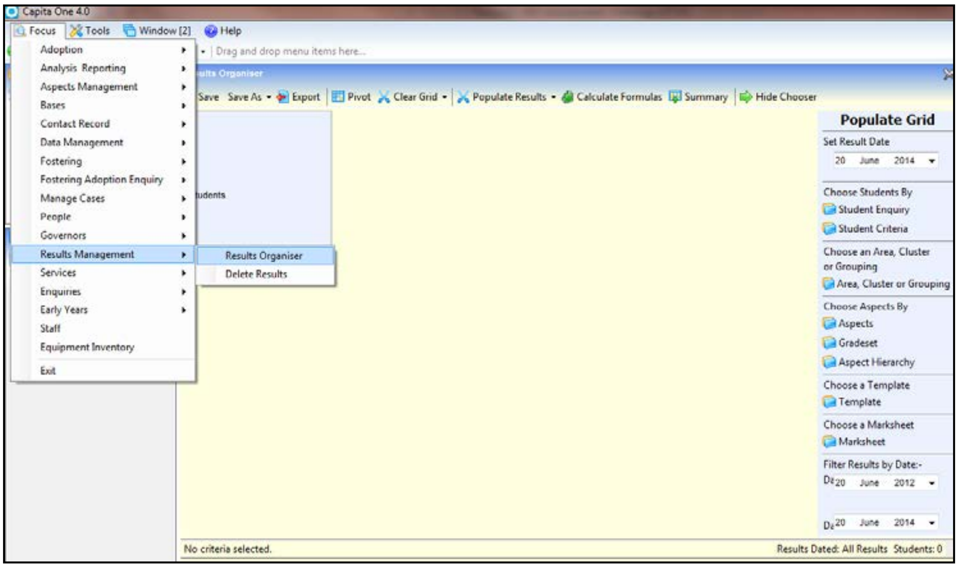
In v3 Music Tuition, the following menu routes were available for updating results:

- Focus | Student | Grades Attained | Add result.
- Tools | Routines | Music Grades - Updating results information in bulk.

Users are not able to manually add a result in v4. This process is now managed via v4 Client Results Organiser, for which a PULSE module licence key is required:

Function	v3 Route	Equivalent v4 Client Functionality
Adding a result to an individual student	v3 | Music Tuition | Focus | Student | Grades Attained and **v3 | Music Tuition | Tools | Routines | Music Grades**	**v4 Client | Focus | Results Management| Results Organiser**. The user needs to choose Music Aspects here.
Adding results for a group of students	**v3 | Music Tuition | Focus | Student | Grades Attained**	**v4 Client | Focus | Results Management| Results Organiser**. The user needs to choose Music Aspects here.
Amending student results in historical records	**v3 | Music Tuition | Focus | Student | Grades Attained**	As above. The user can right-click on the result to input a new value.
Requirement for PULSE license?	No	Yes - to carry out the above mentioned activities.

The following graphic shows an example screen from the **v4 Client | Results Management | Results Organiser** grid:



04 | Finance

There is a new approach to managing financial transactions for both Training Manager and Music Tuition. One v4 supports the recording of financial transactions of the following types:

- Purchase Credit
- Purchase Invoice
- Purchase Order
- Sales Credit
- Sales Invoice
- Sales Order
- Write Off.

Transactions are linked with an invoice point and a nominal ledger account. For training events, this enables the LA to keep detailed records of transactions for each course, or each course template, or at a higher level, to help assess the profitability of running specific courses. Financial transactions can be exported to your LA's finance system.

In v4, a financial transaction must be linked to a nominal ledger account (which in itself must be linked to one or more cost centres/training units) and an invoice point.

In order to record transactions in v4, discrete records for the invoice point and nominal ledger account need to be established as well as any discount records. This is different from v3 where no discrete record was required for the invoice point (other than the entity itself such as the base) and the course fee was recorded directly against the course.

Course fees are no longer directly recorded in course details. Instead a ledger account is optionally associated with a course, which then means that the **Billing** area for the course is available, subject to permissions. LAs wishing to use the Finance area can choose whether to set up one nominal ledger account per course or course template or more minimally, set up one nominal ledger for each different standard course fee. Standard fees for courses, instrument hire and ensemble membership are now stored in a nominal ledger account's Standard Fee, that can be associated with 1 course, instrument or ensemble or can cover multiple entities (e.g. all instances of the same type of course).

A free course does not require a nominal ledger, although it is possible to set up a nominal ledger with a default fee of 0. This could be done if you wish to record transactions for venue costs and catering costs that the LA is incurring. Transactions need to be linked with a nominal ledger.

Percentage discounts can be automatically applied to specific invoice points.

> ***NOTE:*** *Because the finance arrangements in v4 are very different form v3, the finance records that have been generated in v3 for either Training Manager or Music Tuition will <u>not</u> be migrated to v4, but will instead remain in v3 only. Please work with a One Knowledge Specialist to discuss how to migrate your financial processes to v4.*

Nominal Ledgers

A nominal ledger account is used to manage and monitor related transactions, e.g. if a nominal ledger is associated with an individual training course it could be used to manage application fee transactions for that course, as well as recording outgoing transactions for venue costs or catering costs etc. This could be used to gauge the profitability of the course. If a course is free to applicants, but still incurs costs that the LA would like to monitor, then the LA could use a nominal ledger account with a zero cost Standard Fee.

LAs using the finance area need to decide how to manage their nominal ledger set-up to manage and monitor related transactions. They need to consider how they wish to report across financial transactions to assess the cost of running training events. Your LA may consider that setting up one nominal ledger per course is too onerous. An LA could opt to set up one nominal ledger for each template or each type of repeating course.

As a minimum, if you wish to record course, instrument or ensemble membership fees, then a nominal ledger needs to be set up for each different standard course fee, instrument related fee or membership fee. For example, if all of your courses have standard fees of either £100, £75, £50 or free of charge then you would need to set up at least three nominal ledgers with a default fee of £100, £75 and £50.

Nominal ledger accounts can be associated with one or more cost centre/training unit.

Invoice Points

In v4 (unlike v3) a separate Invoice Point entity (e.g. the Application Fee payer) needs to be set up. It is set up from a base, governing body, Early Years provider, person etc. but it must be set up as a discrete entity. When implementing the software, therefore, consideration should be given to invoice point set up.

In the migration of Music Tuition from v3 to v4, each sponsor (v3 fee payer for music financial transactions) is set up as an invoice point automatically.

For Training Manager, there is no automatic setting up of invoice points (e.g. for bases) as part of the migration routine. If your LA requires help in setting up some bases (e.g. schools) as invoice points, please discuss this with the One Knowledge Specialist working with you on your migration.

Use the **Administration | Invoice Points** focus to create invoice points of different types (e.g. base, governing body, person, individual, etc.). Invoice points can be customers (e.g. to raise sales order or sales invoice transactions for application fees) or suppliers (e.g. to raise purchase order or purchase invoice transactions for venue or catering fees etc.) or both.

In order to link an invoice point to a course application, that invoice point must be created and exist as a separate invoice point entity distinct from, for example, its linked base, governing body or person. Also that invoice point must be associated with the training unit (cost centre) of the course.

When adding a new application, if searching for a person by identifying a base that they are associated with, One expects the invoice point to be the base, and, if this does not exist as an invoice point, it will offer to create one automatically. When adding a new application, if searching for a person without specifying the base, One asks if the applicant should be the invoice point, and offers to create an invoice point representing the person automatically.

Discounts

Percentage discounts can be automatically applied to the sales transactions for invoice points. There is currently no specific support for managing Discount Days automatically (where a school may pay for an entitlement to a number of discounted training days).

Percentage Discounts can be set up at the following 3 levels:

Individual Discount for an Invoice Point

Focus | Administration | Invoice Points

When you select a specific invoice point, a history of discounts can be maintained. When adding a new discount record, you specify the start and end date, the discount percentage, a description and then associate it with one or more nominal ledger accounts (nominal ledger accounts are themselves associated with one or more cost centres). So the discount record is not set up directly between the invoice point and the training unit (unlike v3), but instead it set up via the nominal ledger.

This method of recording discounts can be used to reflect a scenario where a school has different discount arrangements with different training units that may change over time.

This method of recording discounts needs to be done for each invoice point individually. Currently, this cannot be applied to all of the cost centre/training unit's courses by default, but instead to existing nominal ledgers. As more nominal ledgers are added for a training unit, then there will be an administration overhead in setting up the discount arrangements for invoice points that have bought a level of service which entitles them to discounts for all of that training unit's courses, by linking the discounts to be the new nominal ledgers.

Discount Schema Applied in Bulk to a Range of Invoice Points

Focus | Administration | Discount Schemas

Select one of ten schema records (this number is pre-set currently). The discount schema is given a description; invoice points can be associated with the schema (without specifying dates for this association), a history of discount percentages can then be maintained for the schema and linked to multiple nominal ledgers.

It is quicker to set up discount records here for multiple invoice points, since, after setting up the discount record and linking to multiple nominal ledgers, you can select multiple invoice points to which this applies. Schema discounts can be cloned to other schemas.

Current Limitations with this method

An invoice point can only be associated with one schema. If a school has different discount arrangements with different training units then this is not currently wholly supported by the use of discount schemas. It is possible to associate the invoice point to a discount schema to represent one of the discounts, and then record an invoice point individual discount for the others.

It is not possible to associate an invoice point with a schema for a period of time only.

As with other discounts in v4, as new nominal ledgers are added, the discount schemas must be updated to include the new nominal ledgers, so a continuing admin overhead is required.

Discounts Applied to Bases via the Base Type

Focus | Administration | Discount Schemas

Select one of the base types. A history of discount records can be created for bases of the selected base type. A start date, end date, description and association with multiple existing nominal ledgers can be recorded. This is similar to setting up discount schemas except that there is no need to select the invoice points.

NOTE: *Discounts are not cumulative.*

Only one discount will be applied by the system when calculating the transaction amount (e.g. course fees). Discount records are considered via a hierarchy. One v4 looks for a discount at the highest level and, if found, it applies that discount only. If not found, it looks at the next level, etc. *The hierarchy order is as follows:* *1. Invoice point has an individual discount record (via **Admin | Invoice Points**).* *2. Invoice point is associated with a discount schema (via **Admin | Discount Schemas**).* *3. If the Invoice point is a base, check for a base type discount (via **Admin | Discount Schemas**).*

Transactions

Transactions can be managed via the following areas:

- **Administration | Nominal Ledgers | Transactions**.
- **Administration | Invoice Points | Transactions**.
- **Administration | Training Unit | More Options | Billing | Transactions**.
- **Courses | Select Course | More Options | Billing | Transactions** (where the course is linked with a ledger account).
- **Music | Instruments | Select Instrument | More Options | Billing | Transactions** (where the instrument is linked with a ledger account).
- **Music | Ensembles | Select Ensemble | More Options | Billing | Transactions** (where the ensemble is linked with a ledger account).

***NOTES:** It is planned to improve the links between Course Applications and Transactions in the One Spring 2015 Release (3.56), and similar plans with regards to Instrument Hire and Ensemble Membership.* *For courses associated with a nominal ledger with a Default Fee of more than £0, this includes ensuring that when applications are set to Accepted or Invoiced then transactions are created or updated automatically for the linked application of the relevant type (e.g. Sales Order or Sales Invoice). Also, in the One Spring 2015 Release (3.56) it is planned to provide a Bulk Applications Invoicing routine, where a user can select multiple courses and generate invoices for Sales Order transactions associated with applications for these courses in bulk.* *In the One Autumn 2014 Release (3.55), transactions need to be manually created for course applications via **Courses | All Courses | Select Course | More Options | Billing | Add New Transaction**. Transactions will also need to be manually created for Instrument Hire and Ensemble Membership.*

Billing

***NOTES:** When using billing via **Course | More Options | Billing**, the **Type** column, which is usually set to **Person** by default, can be changed to **Applicant** and then the **Name** field's lookup will display a list of applicants for this course.* *Your LA may wish to create Sales Order transactions for some applicants and then update these to Sales Invoices and create an Invoice report from the One database when the application place is accepted. From the transactions list, you can select one or more Sales Order transactions and use the Generate Invoice process to do this. A template Invoice report (Crystal report) needs to be set up via **Administration | Training Units | Basic Details | Training Unit Defaults** and then a paper invoice can be printed using this process. A standard report, Generate Invoice Template is available to help with this. The Invoice report needs to be set up with a parameter that expects the passing of the field IP_TRANSACTION.PRINT_ID.*

05 | Reporting and Alerts

Introduction

Reporting in Training Manager and Music Tuition will be familiar to users of v3 because most of the functionality of the Report Module Tool, Quick Reports, SQL Mail Merge and Linked Documents are included in slightly modified form. It is possible to add, edit and delete reports, run them centrally and from specific contexts within the module, run SQL Mail Merge Queries and link documents to specific entities.

Some notable changes to the way reporting works in v3 are that reports will not be run from files stored on individual computers but must be uploaded to the report server and only one parameter will be passed to a report when run from a specific context, not up to three as previously possible in v3.

Quick Reports have been re-labelled Linked Reports to bring them in line with other modules of v4 online.

Alerts for Training Manager and Music Tuition will also be managed in the v4 Client via **Tools | Administration | Alert Definition**.

Permissions

In order to use the reporting features users need to have the appropriate group permissions applied.

Additionally, a user needs appropriate permissions for the processes associated with a screen (e.g. **Applications**, **Courses**) in order to make full use of the more options control to run Linked Reports, SQL Mail Merge queries and Link Documents.

Group Permissions

Access to the reporting functions is controlled by the assignment of user group processes in the v4 Client via **Tools | Permissions | User Group Processes | Administration Main Business Process**.

It is possible to segregate the management of reports from their use by assigning these permissions accordingly. The core business processes under Administration which relate to reporting are:

- **Report Processing** - Granting Read/Write/Delete on this process allows a group's users to search for and run all reports on the **All Reports** screen that they have been granted through Report permissions.
- **Summary Reports** - Granting Read/Write/Delete on this process allows a group's users to run Linked Reports from the more options control for all reports they have been granted through Report permissions which are linked to a particular screen.
- **Report Management** - Granting Read/Write on this process allows a group's users to add new reports, edit existing reports, edit an existing report's description and edit a Linked Report's linked screens. Granting Read/Write/Delete allows a group's users all of the above privileges as well as granting the ability to delete a report.
- **Linked Documents** - Granting Read/Write/Delete on this process is required to allow a group's users to view the PDF copies of Logged Report files.
- **SQL Mail Merge** - Granting Read/Write/Delete on this process allows a group's users to add SQL Mail Merge queries via the Administration Module online.

> ***Note:*** *It will be necessary to re-grant permissions on the Report Permissions, Report Processing and Summary Reports business processes under Administration for groups who have previously been granted permissions for these processes if they need to use the reporting functions in Training Manager or Music Tuition.*

Managing Reports

Users in groups who have been granted Read/Write or Read/Write/Delete permissions for the Report Management business process will be able to manage reports used in Training Manager or Music Tuition including adding new reports, editing information about existing reports, linking reports to screens and deleting reports.

Adding a New Report

To add a new report navigate to **Reports | All Reports** and click the **Add new report** link.

The new report entry fields are displayed in the master panel in editable mode.

Report Title: This is user specified. It can be up to 40 characters, cannot contain / \ ? % * :| " < or > and must be unique.

Select Process: This allows the user to select the folder or subfolder on the report server where the report will be placed and indicates the process to which the report relates.

This is pre-populated with Training Manager or Music Tuition but any other folders that have been added on the report server underneath this directory may be selected using the magnifying glass to search for them or typing a portion of the folder name in the text box and selecting it from there.

Upload new report: This is a standard Windows dialog for selecting a file from an accessible location on the local or network drives. The file must be a *.rpt. The filename must be unique within a subfolder. If the filename already exists in the folder, the newly added file name is appended with an _x incrementing by one each time a file of the same name is added (e.g. Report.rpt, Report_2.rpt, Report_3.rpt).

Data Shielding: This is a check box which, when selected, indicates a report contains sensitive information.

> ***NOTE:*** *It is for information purposes only and does not prevent the report from displaying that information.*

Linked report: Select this check box to enable the **Links To** tab and the ability to link the report to other screens in Training Manager or Music Tuition.

Last Uploaded: This is a read-only field and displays the date the RPT file was uploaded.

> ***NOTE:*** *If the report has been added directly to the server and not added via the user interface this displays the created date in the file's properties.*

Report ID: This is a read-only field that displays the unique Report ID generated by and stored in the database for the report.

Once all required fields have been populated, clicking the **Save** button copies the selected RPT file to the chosen process folder on the report server and creates a database record for the report. The report appears in the search results grid and the **Report Details** and, optionally, the **Links To** tabs are displayed.

If an RPT file has been added directly to the report server and not through Training Manager or Music Tuition, it still appears in the search results and it is possible to run the report from the **All Reports** screen. In this case, the file name displays the report title, the report does not have a Report ID and it is not possible to link the report to any screens until the report information has been edited and the **Linked Report** flag set. Editing a report which has not been added through Training Manager or Music Tuition creates a database record for the report.

Editing an Existing Report

To edit an existing report, navigate to **Reports | All Reports**, search for and select a report from the results grid and click the **Edit** link in the upper right hand corner of the master panel.

When editing a report, the title can be changed, a new *.rpt file uploaded and the **Data Shielding** and **Linked Report** flags changed.

If a report has previously been linked, deselecting the **Linked Report** check box removes the report from all screens it was previously linked to. A confirmation message is displayed to warn of this impact.

NOTE: *It is not possible to change the process folder of a previously added report.*

Deleting a Report

To delete a report, select the report from the search results grid and click the **Delete Report** link in the upper right-hand corner of the master panel.

Deleting a report has the following effects:

- The physical RPT file is deleted from the report server.
- The report is no longer visible when searching for reports via **Reports | All Reports**.
- The record for that report in the ccs_online_reports_repository table is deleted.
- If the report is a linked report it is no longer displayed in the **Linked Reports** list.
- The records associated with the report are deleted from the ccs_online_reports_links table.
- If the report has been logged against an entity, these records are retained but it is not possible to re-run the report and users attempting to do so will receive an error message.

Report Description (Memo)

The **Description** field on the **Report Details** tab provides a basic text editor to record relevant details of the specific report.

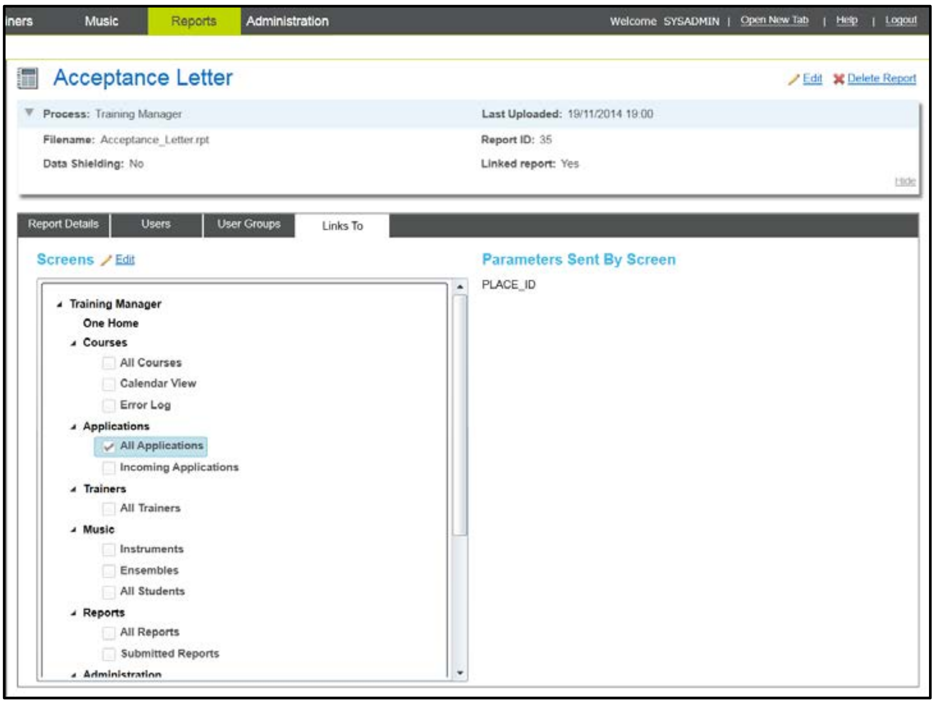
To add or amend the report description, click the **Edit** link next to the **Description** label and enter a description.

Linking Reports

If a report has the **Linked Report** check box selected, the **Links To** tab is visible in the details panel.

The **Links To** tab displays an expandable hierarchy of screens in Training Manager or Music Tuition with linkable screens appearing at the lowest level of the hierarchy. Any previously linked screens display a tick to the left of the screen name. Highlighting a screen displays the parameter passed to a report from that screen. If it is not possible to link to the screen, the following message is displayed:

Page cannot be linked to



To link a report to a screen or screens, select the **Edit** link to the right of the screen label to enable editing. The screens which can be linked to have a check box to the left of the screen name (if a report is currently linked to the screen this will be selected). Select the check box next to the screen or screens and save the changes to link the report to those screens.

Running Reports from All Reports

All reports that can be run are displayed via **Reports | All Reports**. Selecting a report from the search results grid displays details of the report in the master and details panels. To run the selected report, click the **Run Report** button on the **Report Details** tab to enable the entry of parameters and submission of the report to the **Submitted Reports** screen.

Reports with Parameters

If a report contains parameters, a modal window is displayed enabling you to enter all required and optional parameters prior to the report being submitted. The parameters displayed are individual to each report and dynamically displayed on running.

Submitted Reports Screen

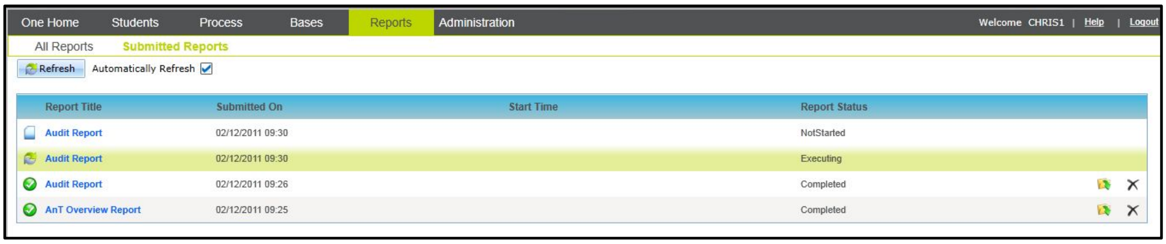
The **Submitted Reports** screen, accessed via **Reports | Submitted Reports** or by clicking the link on the success message received on running a selected report, lists all reports run by the logged on user from any module in One v4 Online or v4 Client and is analogous to the **My Submitted Reports** screen in v4 Client.

This screen shows the **Report Title**, date the report was submitted, the report's **Start Time** (not used by Admissions and Transfers), the **Report Status**, a folder button to open the report and a delete button to remove the report from the screen.

Reports submitted to the queue will display one of the following statuses:

- **Not started** - When a report has been submitted to the queue to be run but has not yet started.
- **Executing** - When a report is currently being run.
- **Completed** - When the report has completed successfully.

- **Error** - When the report running has failed.



To open a submitted report with a status of **Completed**, click the folder icon. The report is displayed in a Crystal Report Viewer window.

Reports are retained until deleted and can be opened at any point in the future.

To delete a report from the list, click the delete icon. This deletes the user's stored copy of the previously run report and not the report definition the report was run from.

> ***NOTE:*** *Deleting a report from the* ***Submitted Reports*** *screen removes it from the user's* ***My Submitted Reports*** *in all One v4 modules (v4 Online and v4 Client).*

Running Linked Reports

Reports that have been flagged as linked and have been linked to a screen or screens appear in the **Linked Reports** menu under **More Options** in the upper right-hand corner of the screen.

Expanding the **Linked Reports** menu displays a list of reports linked to the particular screen.

Clicking on a report title runs the report. As with v3 Quick Reports, a linked report may be configured to accept a default parameter. If no other parameters are present, the report will run without prompting for other parameters. If the report contains multiple parameters, including the one passed from the screen, the modal parameters window is displayed with the passed parameter pre-populated.

A prompt is displayed asking if the report should be logged. Once all parameters have been supplied and the Report Logging option selected, the report launches in a Crystal Report Viewer window.

> ***NOTE:*** *Linked reports are not sent to the* ***Submitted Reports*** *screen and are not retained for future viewing by the logged on user.*

Report Visibility

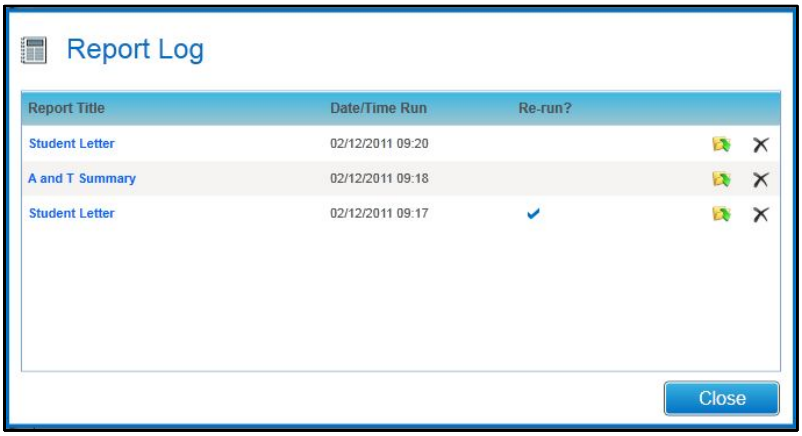
All users who have access to a screen can see the reports which are linked to that screen even if they do not have report permissions granted on them.

Reports with Parameters

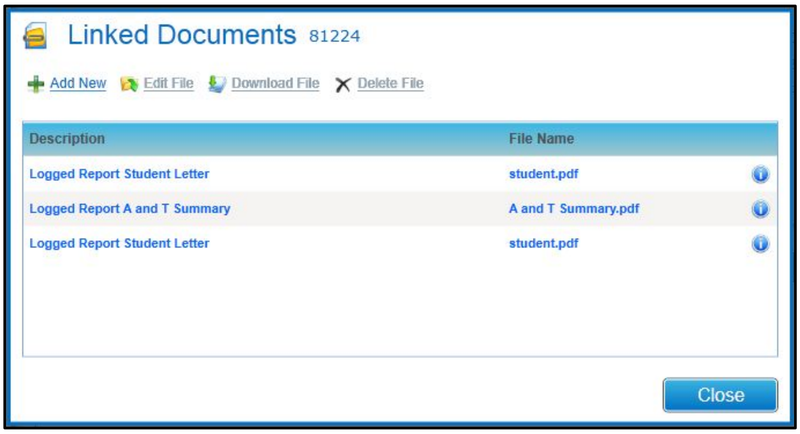
As previously described, each of the screens which accommodate linked reports will pass a single parameter to a linked report. If a report contains additional, different or other parameters, a modal window is displayed enabling the input of these parameters prior to submitting the report.

Report Log

When running a linked report it is possible to log that the report has run. Each time a report is run from the list of linked reports, a confirmation message is displayed asking if the report should be logged. Click the **Yes** button to create an entry in the Report Log for that entity (Student, Transfer Group, Base, Appeal etc.) storing a link to the report file and the parameters supplied to the report at the time it was run. This entry is visible to all users who have access to that entity and linked reports and is accessed by clicking the **View Report Log** link at the top of the list of linked reports.



A PDF copy of the report output is saved in the linked documents for that entity.



Re-Running a Logged Report

As in v3, it is possible to re-run a previously logged report. When viewing the **Report Log** click the Re-Run folder icon to re-run the selected report. The log entry may either be overwritten with the current run date or a new entry created to show that the report has been run more than once. Reports that have been re-run display a tick in the **Re-run?** column, even if the existing log entry has been overwritten. A PDF copy of the re-run report output will be added to the linked documents for the entity.

Linked Documents

Linked documents may be accessed from the **More Options** menu in the upper right-hand corner of the screen. This will be visible on selecting a valid entity.

More Information: Common Functionality - Linked Documents is available in the **One v4 Online** section of the **Reference Guides** page on the One Publications website (www.onepublications.com).

SQL Mail Merge

SQL Mail Merge may be accessed from the **More Options** menu in the upper right-hand corner of the screen. This is visible on selecting a valid entity.

More Information: Common Functionality - SQL Mail Merge is available in the **One v4 Online** section of the **Reference Guides** page on the One Publications website (www.onepublications.com).

Alerts

More Information: Common Functionality - Alerts is available in the **One v4 Online** section of the **Reference Guides** page on the One Publications website (www.onepublications.com).

Specific Advice for Migrating Training Manager and Music Reports

LAs migrating to Training Manager v4 need to consider existing reports. Also, any alerts locally configured for v3 do not apply in v4.

Most of the v3 database tables related to Training Manager are used in v4.

Some existing reports for Training Manager may continue to work in v4 without requiring any changes. Some other reports may need to be updated (e.g. in relation to reporting on applicant's needs as this would now be covered via Additional Questions).

Finance information for both Training Manager and Music Tuition is stored in a new set of tables. This means that any Finance Reports based on data stored in Capita One need to be rewritten.

For Music Tuition, any reports on student tuition records need to be rewritten for v4 to reflect new methods of storing information via courses and applications.

The following is a summary of the key tables/views for reporting:

Entity	V4 Table/View
Courses	EV_OCCURRS
Course Templates	EVENT
Sessions	SESSIONS
Course Leaders	COUR_LEADR
Session Leaders	SESS_LEADR
Additional Questions (Course Level)	APP_ADDITIONAL_QUESTIONS
Course Analysis	COURSE_ANALYSIS_DET
Applications	IN_PLACES
Application Additional Questions	USERS_ANSWERS_TO_QUESTIONS,ADD_QUESTIONS_LIST_OPTIONS
Applicants Sessions	IN_PLACES, SESSION_ATTENDANCE
Sessions Attendance	SESSION_ATTENDANCE
Incoming Applications	COURSE_APPLICATION
Error Log (Scheduled Communications)	MESSAGES_ERRORLOG,TM_SCHEDULE_ERRORLOG

Trainers	PEOPLE,ROLE_LINK,ROLE_CODE
Training Units	TRAINING_UNITS
Training Unit Application Priorities	BASE_PRIORITY_LINKS
Venues	VENUES
Organisations	ORGANS
Music Tuition	
Instrument	INSTRUMENT
Instrument Hire	INSTRUMENT_HIRE_LIST
Instrument Repair	INSTRUMENT_REPAIR
Ensembles	MUS_ENSEMBLES
Ensemble Membership	MUS_ENSEMBLE_MEMBERSHIP
Music Tuition record	In v4, this is managed via Course Applications and links with Session Attendance.
Sponsors	In v4, these are Invoice Points.
Music Tutors/Trainers	PEOPLE,ROLE_LINK,ROLE_CODE
Trainers Subjects Taught	TM_SUBJECT_TAUGHT
Trainers Qualifications	QUALIFICATIONS
Trainers Observations	MUS_OBSERVATION
Trainers Checks	CLEARANCE_CHECKS
General	
Bases	BASES
Person Details	PEOPLE
Students	STUDENT
Finance	
Transactions	IP_TRANSACTION
Nominal Ledgers	IP_NOMINAL_LEDGER,IP_LEDGER_CC_LINK
Invoice Points	IP_INVOICE_POINT,IP_INVOICEPOINT_CC_LINK
Invoice Point Discounts	IP_DISCOUNT
Invoice Points associated with Discount Schemas	IP_INVOICE_POINT

> ***NOTE:*** *When Crystal reports are generated directly from the entity page in the application (in v3 these were known as 'Quick Reports', in v4 these are known as 'Linked Reports') then in v4 only one parameter will be passed from the system to the Crystal report. This is different from v3 where multiple parameters could be passed. For example, when a Quick Report was generated from a Training Manager Course Application in v3, then the system would pass to the Crystal report both the Course Identifier (EV_OCCURRS.COURSE_ID) and the Application Identifier (IN_PLACES.PLACE_ID). In v4, when a Linked Report is generated from an application or a Scheduled Communication is generated for an application, then the system is only passing the Application Identifier (IN_PLACES.PLACE_ID). Therefore, some work is likely to be required on any such reports/letters in order to remove parameters that are no longer necessary. The parameters that the system passes to Linked Reports for different entities are listed in Training Manager or Music Tuition via* ***Reports | All Reports****, select a report which has been identified as a Linked Report then navigate to the* ***Links To*** *tab.*

If your LA wishes to print invoices, then the Invoice Report associated with the Training Unit needs to be set up with a parameter that expects the passing of the field IP_TRANSACTION.PRINT_ID.

Standard Reports

A new set of standard Crystal reports are being issued with this release to provide templates to help report designers:

- Management Information Summary report
- Generate Invoice template
- Course Applications Statistics Summary
- Course Register - per session
- Course Directory
- Ensemble Current Membership for 'active' Ensembles.
- Instrument Records report

06 | Training Manager Online via the Provider Portal and the Citizen Portal

Introduction

The Provider portal enables users with a One login account, mapped to a base, to create course applications on behalf of their colleagues at 'their base'. For example, a School Training Co-ordinator can make applications for either Staff or Governors associated with their school. If your LA departments are set up as bases, then a member of an LA team can make applications on behalf of others in their team. Applications can either be for named applicants (entered as free text), to reserve places for as yet unnamed applicants or both.

The Citizens portal enables users to create personal course applications.

In both portals, the user can view a list of active applications as well as their application history. It is also possible to return to finish incomplete applications.

An LA may wish to enable one or both of these portals.

> ***NOTE:*** *Most text that appears in the Provider portal and the Citizen portal can be configured locally so you can tailor the guidance you provide to your users.*

Once online applications have been made, they then need to be processed in the back office application via the **Applications | Incoming Applications** area. Firstly, the online applicant needs to be matched or added as a new person, or added as an 'individual' (without requiring the details to be added to the One Person database). Secondly, the application itself can be imported.

High level business rules for managing online applications can be configured per Training Unit via **Training Manager | Administration | Training Units | Online Defaults**.

> **More Information:** *Configuration Advice for Running Training Manager Online via the Provider Portal and the Citizen Portal* on page *42*.

07 | System Administration and Assigning Permissions

System Administrators need to ensure that access rights have been set appropriately in v4 before users start to use Music Tuition in v4. Access rights for v3 have no effect in v4.

The general principle of Music Tuition in v4 is that if a user does not have permission to read information in a particular area, or does not have permission to carry out a process, then the information or process button is not visible to them. This ensures that the information seen on an individual user's screen is relevant to their individual business processes.

System Administrators will automatically have access to most areas in v4. The exception to this is that they will not be granted permissions to the Music Training Unit (which is created as part of the migration process from v3) automatically; this needs to be explicitly granted to them via the **Music Tuition | Administration | Training Units | Training Unit | User Group** by assigning a group that includes the System Administrator to that training unit.

Managing Users and Groups

User accounts (including passwords) need to continue to be created in v3. Groups also need to be created and user membership of groups maintained in v3 (via **System Administration | Users/Groups**).

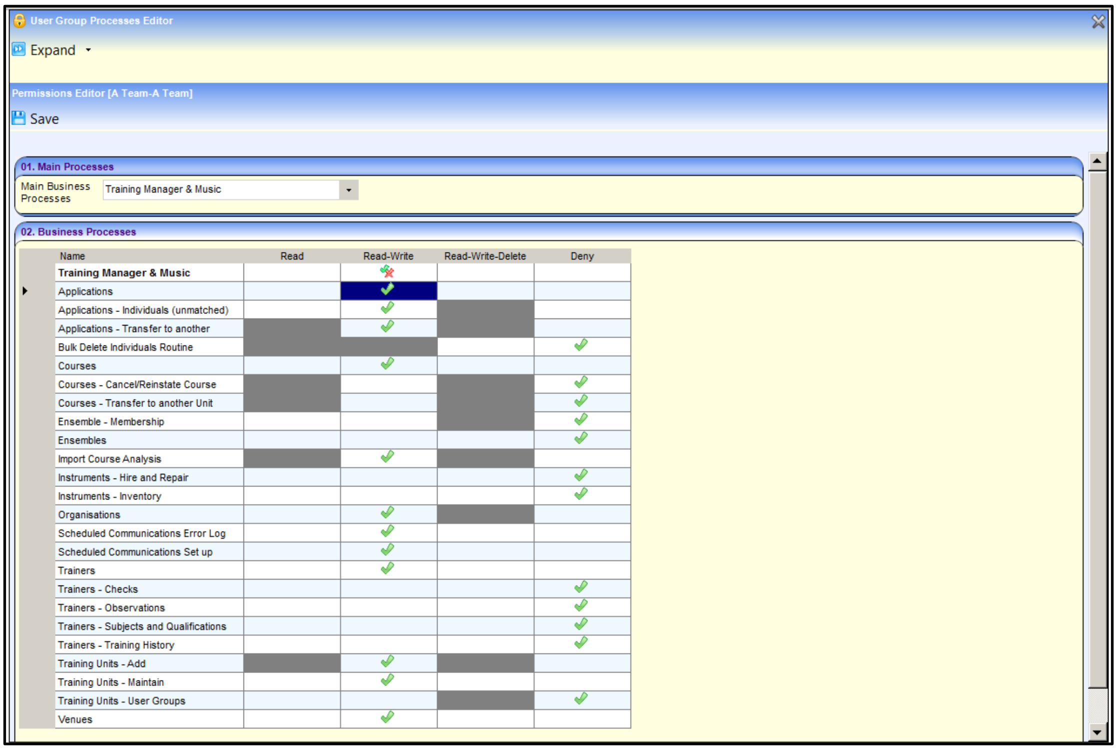
Permissions

System Administrators need to manage permissions for Music Tuition in v4 Client. The main area for managing permissions is **Tools | Permissions | User Group Processes**. The process of setting up permissions has been simplified compared to v3 in this area. Business processes are listed which represent a logical grouping of a number of lower-level individual 'web methods'. Granting Read-Write permission to a specific business process automatically grants Read-Write permission to the lower level web methods that are linked to that business process.

Normally, we would expect that Music Tuition permissions will be granted to users via **Tools | Permissions | User Group Processes**. In addition to this there is another option which gives greater visibility to the many individual web methods which is via **Tools | Permissions | User Group Permissions**. This area can be used if greater control of individual permissions is required. The information presented in this area is quite technical, so if your LA needs to use this area in order to refine permissions you may need to seek assistance from Capita via the Service Desk.

> ***NOTE:*** *When a group of users is granted access to any business process within the v4 Client via* ***Tools | Permissions | User Group Processes****, this group of users automatically inherits access to a number of low-level, low-risk individual web methods across the system that carry out background utility processes, for example to retrieve lists of lookups.*

As mentioned previously, permissions are normally set via **Tools | Permissions | User Group Processes**. Within this area, first search for the Group Name. Once the group has been selected, the System Administrator will be prompted to select the **Main Business Process**. Once a main business process has been selected then this will list a number of **Business Processes** within this main heading to which the System Administrator can grant the selected group of users Read, Read-Write or Read-Write-Delete access (options depend on the nature of the business process). By default, groups have no permissions to business processes so a tick in the **Deny** column is displayed. The following is an example screen listing some core Training Manager and Music Tuition processes:



NOTE: *If a tick and cross icon is shown together in one area this means that only some of the individual web methods that are linked to this business process have been granted to the group of users because they are shared with other business processes.*

The following main business processes are relevant to Training Manager. These are listed together with the most significant business processes within that main business process:

Student Data

Core Data: Users need at least read access to Core Student Data to enable student searching. This would be granted to appropriate users if they need to manage Student applications for courses.

School History: There are many other business processes here controlling access to specific areas of student data.

Addresses

Person/Student Addresses: This deals with associating addresses to people and students within the v4 Client so is <u>not</u> used for v4 Training Manager or Music Tuition.

Save Address: This permission enables users to add a new address to the address database (e.g. a new street, or a new dwelling on a street).

Save Address Geocode: This permission enables users to update geocode information (e.g. Easting and Northing) for an address.

Save Linked Addresses: This permission enables users to associate addresses to people or students within v4 Training Manager and Music Tuition.

Base Administration

Bases: Read access is required to search for bases.

People Roles: Read access is required to search for people using their role. Read-write permission is required to manage People Roles via **Administration | People Roles**.

Person Administration

Person Details: Users need at least read access to this process to enable searching of the One People database e.g. to manage Music Tutors.

Training Manager and Music

Applications: In addition to requiring access to this business process to view, create or update applications for music tuition events, users also need access to read student data, person details, and bases.

Applications - Individual (unmatched): In addition to the above, this process enables the user to manage applications for ‘individuals’ (where the applicant is not selected from the One People or Student database, but instead the applicant’s personal details are recorded as free text).

Applications - Transfer to another course: This enables the user to transfer an applicant from one course to another.

Bulk Delete Individuals Routine: This enables the user to select a training unit and to run a routine to bulk delete any ‘individual’ records linked to applications for courses that ended on or before a configurable date. The applications linked to these individuals will be retained. This does not affect the personal details of applicants stored in the One People database. This is carried out via **Administration | Training Units | More Options | Bulk Delete Individuals**.

Courses: This controls access to viewing, creating, updating, cloning and deleting courses as well as maintaining sessions and course analysis (recording feedback). In v4, courses and sessions are used to represent music tuition events.

Courses - Cancel/Reinstate Course: This enables the user to cancel a course and to reinstate a course that has been previously cancelled.

Ensembles: This enables the user to manage ensembles.

Ensemble - Membership: This enables the user to manage the membership of ensembles.

Import Course Analysis: This enables the user to import files containing course feedback provided by applicants via **Administration | Import Course Analysis**.

Instruments - Inventory: This controls access to the management of the instrument inventory.

Instruments - Hire and Repair: This enables the user to manage instrument hire and repair records.

Organisations: This controls access to viewing and managing organisations.

Scheduled Communications Error Log: This controls access to the **Courses | Error Log** which captures problems related to the sending of scheduled emails or SMS texts such as missing email address or mobile phone number.

Scheduled Communications Set Up: This enables the user to set up scheduled communications such as automatic emails, SMS texts or letters in relation to events such as course start date or course end date or in relation to updating of application status or cancelling a course. Scheduled communication templates can be set up at the training unit or course template level and are then automatically cascaded to courses. Scheduled communications can also be tailored for individual courses. This area is accessed by selecting the entity and then using **More Options | Scheduler**.

Trainers: In addition to requiring access to this business process to maintain trainers, users will also need access to read person details. The business process also provides access to view the list of courses to which the trainer is assigned. In order to use the **Update Trainer** funtionality to replace the selected trainer with an alternative, the user will also need permission to read-write courses.

Trainers - Checks: This business process controls access to clearance checks details for trainers.

Trainers - Observations: This business process controls access to this area for recording details of observations made by other staff in relation to this trainer's leading of courses/music tuition events.

Trainers - Subjects and Qualifications: This controls access to the instruments taught by music tutors. For training manager leaders, this controls access to the subjects taught instead. This also controls access to their qualifications.

Trainers - Training History: This enables the user to access the history of training that the trainer has received. It captures whether this person has been an applicant on any Training Manager courses and also enables recording of other training received.

Training Units - Add: This controls access to adding training units. This is a feature used by the Training Manager area where there can be multiple training units, rather than for use within the Music Tuition area.

Training Units - Maintain: This controls access to viewing, editing and deleting training units.

Training Units - User Groups: This controls access to adding and removing the groups of users that are able to access each training unit. The user groups need to be created via v3 System Administration.

Venues: This controls access to viewing and managing venues. In order to add venues, users also need permission to view bases and organisations.

Finance

Discounts: This enables the user to manage discount defaults and also to record discounts for invoice points.

Import Transactions: This enables the user to import data related to transactions. For example, this process may be used to update the **Paid** status of transactions. This is achieved by opening the **Transactions** list for the selected entity (e.g. **Administration | Training Unit | More Options | Billing** or **Courses | More Options | Billing** etc.) and using the **Import** option.

Invoice Points: This enables the user to manage invoice points. In order to set up a person as an invoice point the user will also need access to Person Details.

Nominal Ledgers: This enables the user to manage nominal ledgers.

Nominal Ledgers - Bulk Update VAT: This controls access to the business process to update VAT rate for multiple nominal ledgers with a specified percentage where the existing VAT rate is a different specified percentage. This is accessed via **Administration | Nominal Ledgers**, select a nominal ledger then access **More Options | Update VAT**.

Transactions - Batch Process: This controls access to the **Batch Process** option from the **Transactions** list that enables the user to select multiple transactions of the same type and update data items with specified values for these transactions.

Transactions: This controls access to maintaining transaction details for the selected entity.

Transactions - Generate Invoices: This controls access to the **Generate Invoice** option from the **Transactions** list. After selecting one or more sales order transactions this updates the transactions to sales invoice and, optionally, enables the user to generate and print an invoice report.

Transactions - Write Off: This controls access to updating a sales invoice or purchase invoice transaction, which has not been paid, to convey that the transaction has now been written off.

Administration

Communication Log: At least read access is required to access the Training Unit's communication log via **Administration | Training Unit | More Options | Communication Log**.

Lookup Administration: If any user who is not flagged as a System Administrator needs to be able to manage lookup codes they need read-write access to this business process. Lookups are managed in the v4 Client via **Tools | Administration | Lookups**.

Linked Documents: Enables users to view or manage documents linked to students, instruments, ensembles, courses, applications, trainers etc. via **More Options | Linked Documents** after selecting the entity.

Report Processing: Enables the user to access the **Reports** focus.

Report Management, Report Permissions: Enables the user to manage reports via the **Reports** focus.

Summary Report: Once the user has selected an entity such as a student or course, this enables the user to use **More Options | Linked Reports | View Report Log**.

UDF Management: Access to v4 Client **Tools | Administration | UDF Management**.

08 | Migrating Your System to v4

When to Migrate - Points for Consideration

For both Training Manager and Music Tuition, it is necessary to run a migration routine to migrate v3 data to the v4 environment.

Local Authorities can choose to migrate v3 Training Manager training units individually into v4 over time or migrate all training units at once. Once a training unit has been migrated to v4 and new courses have been created in v4, it will not be possible to access these new courses in v3. This is because in v4 courses are no longer associated with a specific financial year.

V3 Music Tuition can be migrated independently of v3 Training Manager. During the migration of v3 Music Tuition, a **Music** training unit is created automatically in v4.

V3 Training Manager and v3 Music Tuition will continue to be available and accessible after running the migration routine to migrate a training unit or Music Tuition to v4. The decision regarding dates and details for decommissioning of the v3 modules has yet to be finalised, but this will not be for at least a year after the Autumn 2014 release. The first stage of decommissioning is likely to be to make v3 read-only for a period, since it is recognised that some information currently stored will not be migrated to v4.

Local Authorities need to give careful thought to the timing of the migration to v4. It is possible to run both systems in parallel to some extent. Please bear in mind the following information:

NOTES: *Since the finance arrangements in v4 are very different, this means that the finance records that have been generated in v3 for either Training Manager or Music Tuition will not be migrated to v4, but will instead remain in v3 only. Financial information recorded in v4 will not be accessible from v3. Depending on your LA's usage of the finance elements of these modules and your reporting requirements across financial information, you may need to continue recording financial information in v3 until the end of a suitable period, and then start the next period using the new financial arrangements in v4. Please work with a One Knowledge Specialist to discuss how to migrate your financial processes to v4.*

For Training Manager, courses added in v4 will not be visible in v3. However, if a course is added in v3 after running the migration routine for the training unit it will be visible and accessible in v4 (with the exception of user defined fields).

For Music Tuition, since the approach in v4 to managing student tuition is very different from v3, v3 student tuition records will not be migrated to v4, but will remain in v3. The Music migration routine will migrate Instrument Inventory details and Ensembles (and membership) only. After running the migration routine for Music, it is possible to manage Instruments and Ensembles in v4 but continue to manage student tuition in v3 until the end of a suitable period (for example the academic year), and then start the new period by setting up student tuition event data in v4. You may wish to gradually transition to v4 by adding new student tuition events gradually in v4.

For Music Tuition, we strongly recommend that LAs work with a One Knowledge Specialist to discuss the best approach to managing this process of transitioning to the new method of managing student tuition events.

How to Run the Migration Process - Notes for the System Administrator

We recommend that LAs set up a test environment in order to gain familiarity with the new v4 solutions and to trial the migration processes. Ideally the test environment would be a copy of your live data.

Here are the steps required to for a System Administrator to migrate Training Manager or Music Tuition from v3 to v4 in any environment.

1. Upgrade your system to the One Autumn 2014 Release (3.55). This release is available to download, and the download details are in the release notes which can be found on the One Publications website (www.onepublications.com) and on SupportNet under Resource ID: 23530.
2. Obtain appropriate licence keys for the new modules in v4 from the Capita One Business Support team. Customers are reminded that it is normal practice to request the serial and licence files which will be needed to allow you to access the applications contained in and updated by the One Autumn 2014 Release (3.55). Please contact onebusinesssupport@capita.co.uk to request your updated files. The relevant licences for Training Manager and Music Tuition in v4 are as follows (your LA may have purchased one or more of these module areas):
   - Training Manager v4.
   - Music Tuition v4.
   - Portal Training Manager (this is for LAs using Training Manager Online in v4).

Running the Migration Routine

1. Access **v4 Client | Tools | Administration | Migration | Migrate v3**. Choose the Migration Module of either Training Manager or Music Tuition.

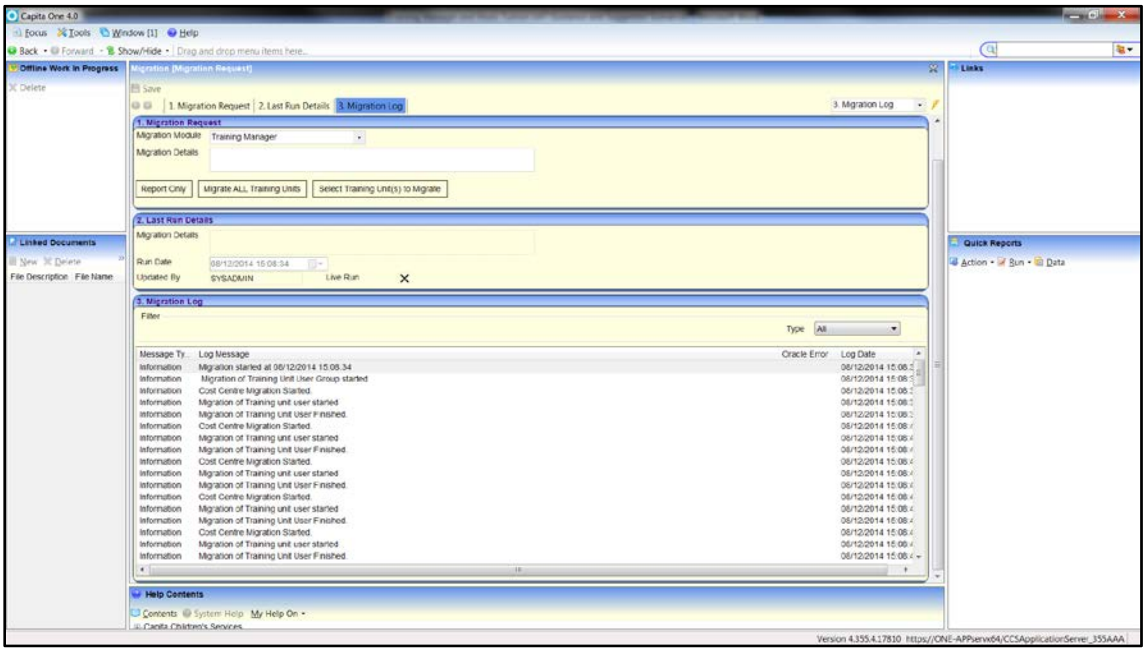
   If you choose Music Tuition you will see 2 options: Report Only and Migrate Live Data.

   If you choose Training Manager you will see 3 options: Report Only, Migrate ALL Training Units and Select Training Unit(s) to Migrate.
2. The migration routine must be run in Report Only mode at least once before running in Migrate Live Data mode. This is achieved by clicking the **Report Only** button. This does not require exclusive use of v3 or v4. Capita One users can continue to use the system while this is run.

> ***NOTE:*** *For Training Manager, the Report Only mode will report across* ***all*** *Training Units. It is not possible to run a 'Report Only' for an individual training unit.*

3. A migration log is generated for each run of the migration routine, whether that was in Report Only mode or Live mode. Review the migration log. This log contains confirmation that certain areas of migration have started and finished as well as listing any warning messages or errors. If there are any error or warning messages that you do not understand please contact the Capita One Service Desk. The migration log should start with a message:
   Migration started at <Date / Time> and end with a message:
   Migration completed at <Date / Time>.

   The following is an example of part of a migration log for Training Manager:



4. Correct any errors highlighted in the **Migration Log**.

   The migration routine can be run in Report Only mode more than once, so that System Administrators can review the **Migration Log** and minimise errors listed here.

5. When ready, run the migration routine in live mode. For Music Tuition, this is done by clicking on the **Migrate Live Data** button. For Training Manager you can choose to migrate all training units at once or select training units to migrate. If choosing to select training units to migrate you will see a screen listing all training units and you can choose one or more to migrate at this time.

***IMPORTANT NOTE:** It is strongly recommended that System Administrators make a full backup of your system immediately prior to migration of a Training Unit or Music Tuition.*
<u>Once the live migration routine is run there is no option provided to roll the data back to the pre-migration state.</u> This could only be achieved by System Administrators restoring the system from backup.

***NOTE:** It is also recommended that when running the migration routine in **Migrate Live Data** mode that the System Administrator secures exclusive use of the Capita One system. The system will not require this and will allow the migration routine to be run while users are on the system. Part of the Migrate Live Data routine involves updating memo fields, linked documents and User Defined Fields records. These are stored in tables which are used by many different module areas. If a user is accessing a record that the system is trying to update, then the system will wait for that record to be unlocked before it can update it, so this may add considerably to the time taken to run the migration routine.*

If the Migrate Live Data routine is run successfully, then, after completion, it will not be possible to select that Training Unit or Music Tuition for migration again. In the unexpected event that the Migrate Live Data routine does not finish successfully and the session is terminated, then it will be possible to select that Training Unit or Music Tuition again for migration, and the subsequent run of the Migrate Live Data routine will start up from where the last migration routine left off.

6. Review the **Migration Log** and take any action as necessary to amend individual records.

Setting up Permissions after running the live migration routine

After running the migration routine in live mode, One automatically creates a user group with the same name as the training unit or units that have just been migrated. For Music Tuition, this will be the Music Training Unit. This group will have members of the System Administrator plus the user who has run the migration routine (if this is a different user). This group will be automatically granted some read-write permissions to this training unit. These permissions can be amended as described in the following step.

1. Set up user group permissions in v4 Client via **Tools | Permissions | User Group Processes** using the advice in the *System Administration and Assigning Permissions* section on page *34*. You may wish to amend the permissions that have been automatically granted to the training unit user group. You can add other user groups who will be given different levels of access to the migrated training units.

> ***NOTE:*** *Although permissions are defined in the v4 Client, the actual set up of users, user groups and membership of user groups continues to be managed via the v3 Client.*

2. Assign any required user groups to the specific training unit via **v4 Online | Training Manager / Music Tuition | Administration | Training Units | User Group** tab.

> ***NOTE:*** *In addition to being granted permissions to processes, user groups need to be granted permissions to specific training units.*

3. Set up report permissions via **v4 Client | Tools | Permissions | Report Permissions** using the advice in the *Permissions* section in *Reporting and Alerts* on page on page 24.

Configuration Advice for Running Training Manager Online via the Provider Portal and the Citizen Portal

Provider Portal

The Provider portal enables users to create course applications on behalf of their colleagues at their base. For example, a school training co-ordinator can make applications for either staff or governors associated with their school.

In order for a user to use the Provider portal for this purpose some configuration is required first:

- System Administrator has to have recorded the licence key for **Portal Training Manager**.
- System Administrator needs to ensure that the user account, set up in v3 Client, has an email address recorded and that the user is mapped to their base.
- System Administrator needs to ensure that the user is associated with a user group and that appropriate permissions have been granted to that group. This is achieved in the v4 Client via **Tools | Permissions | User Group Processes | Select User Group**. Select the **Main Business Process** of **Provider Portal** and grant access to the **Training** business process.
- The availability of options on the **Home** page is controlled by the licences held by the Local Authority and user permissions. Other configuration is done via **Provider Portal | Administration | Site Setup | Configuration**.

When the user first logs on to the Provider portal, the system requires them to register by sending them an email. The user must use the link in this email to log on and complete their registration. They will then be asked to select a secret question (these can be defined by the LA) and then provide a response. They will then be able to select the **Courses** option to search for courses that have been published to the Provider portal and make applications either for named applicants (type in the details as free text) or unnamed reservations.

> **More information:** *One Training Manager Courses Provider Portal* handbook is available from the **Training Manager** section of the **Handbooks** page on the One Publications website (www.onepublications.com).

Citizen Portal

The Citizens portal enables users to create personal course applications.

In order for a user to use the Citizen portal for this purpose some configuration is required first:

- System Administrator must have recorded the licence key for **Portal Training Manager**.
- LA Portal Administrator must have configured Portal Settings to **Show Training Manager Application Panel** for Citizen portal. The Portal configuration functionality is accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration**. Click the **Portal Configuration** button to display the **Site Settings** page. The **Application Type Settings** panel controls the availability of the panels on the portal users **Home** page and includes the **Show Training Manager Application Panel** option (which must be set to **ON**).
- LA Portal Administrator needs to set up a group of bases that is displayed when the citizen selects that the **Course Fee Payer** is a **School**. To be displayed in this list, the base must be defined as a **Base Group** in the Bases v4 module. The base group must also be selected as a **Training Manager School** base group on the **Application Settings** panel via **Citizen Portal Admin | Administration | General Administration | Configure Portal Settings | Site Settings**. Until this is done, no bases will be listed under the **School** payment option.

The citizen (e.g. governor, member of staff, etc.) can self-register via the Citizen Portal.

During the self-registration process, the system will require the citizen to register by sending them an email. The user must use the link in this email to log on and complete their registration. They will then be asked to select a secret question (these can be defined by the LA) and then provide a response. They will then be able to select the **Courses** option to search for courses that have been published to the Citizen Portal.

More information: *One Training Manager Courses Citizen Portal* handbook is available from the **Training Manager** section of the **Handbooks** page on the One Publications website (www.onepublications.com).