

Music Tuition v4

last updated for the Autumn 2016 release

CAPITA

Handbook

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01 / Introduction to Music Tuition v4

Introduction

Music Tuition v4 enables the Local Authority to manage music tuition arrangements, music applications, student details, ensembles and instrument inventory including, hire and repair.

It also provides support for recording financial transactions, generating invoices and scheduling communications for those receiving tuition. Music tutor information is maintained including personal details, list of courses conducted, observations, qualifications, instruments taught, training history and checks.

The **Administration** area enables the System Administrator to set up and maintain the key information used in Music Tuition v4.

Using this Handbook

This handbook is intended for One administrators and users of the Music Tuition v4 application. The first chapter provides an overview of common functionality available throughout the application. The second chapter covers the administration of Music Tuition and the rest of the handbook covers day-to-day usage of the software.

What's New in this Release

This handbook has been updated for the One Autumn 2016 Release (3.61) with the following changes:

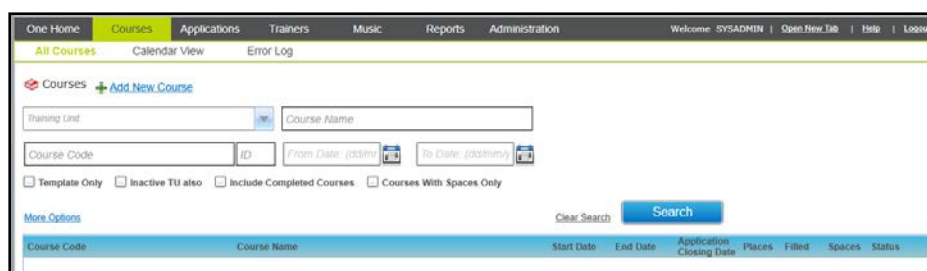
- When setting up a one-day course, it will automatically create a session. For more information, see [Adding a New Course](#) on page 67.
- When adding an applicant onto a multi-session course, it will default to all sessions. Applicants can be removed from sessions in the normal manner. For more information, see [Adding a New Application](#) on page 80 and [Removing an Applicant from a Session](#) on page 83.
- After migration, invoice points can be created for bases, organisations and people that have been migrated. For more information, see [Migrating Invoice Points](#) on page 52.
- The Local Authority can choose the email addresses that are used to notify applicants about course information. For more information, see [Scheduling Email Options](#) on page 54 and [Using the Scheduler to Send an Email](#) on page 8.

Overview of Music Tuition v4

Music Tuition v4 is accessed from the One v4 Online **Home** page.

Click the **Music Tuition** button to display the **Courses** area.

Music Tuition arrangements are managed using courses with sessions (including recurring sessions), with which students can be associated via course applications.



NOTE: Options available depend on access rights granted.

Using Wide View

On some pages containing a large amount of information, the **Wide View** option enables you to view the details without having to use the horizontal scroll bar. In wide view, the search panel is hidden.

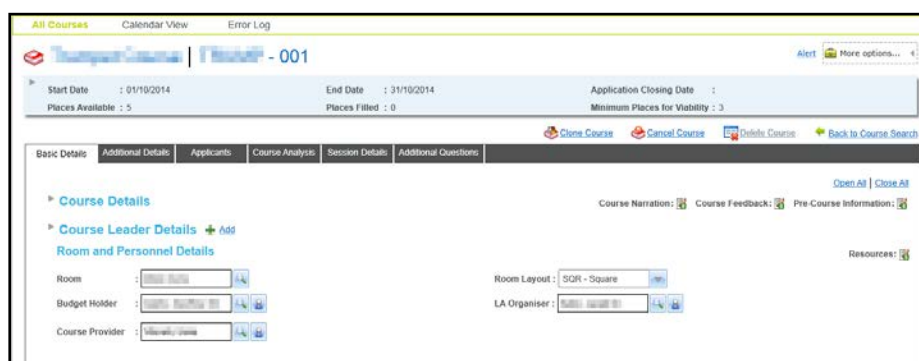
Click the **Normal View** button to display the search panel.

Multiple Tabs

Multiple tabs can be opened within one login session, enabling you to deal with enquiries without navigating away from your current task.

Collapsing and Expanding the panels

On some tab pages the facility to collapse the panels is available. If required, click the **Close All** button to collapse all of the panels as shown in the following graphic:



To expand all of the panels, click the **Open All** button.

To expand or collapse an individual panel e.g. **Course Details**, click the expand button adjacent to the panel name as shown in the following graphic:

Setting up Alerts

An alert can be defined to display a message when a particular record is accessed.

More Information:

The following reference guide is available on the One Publications website and on My Account: RG_Online_Common_Alerts.

Defining an Alert

1. Select the required record.

2. Click the **Alert** button to display the alert dialog.

3. Click the **Add Alert** button.

4. Enter an **Alert Message**.

5. If required, select an **Expiry Date**.
6. Click the **Save** button.

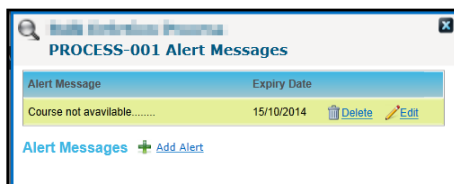
NOTE: If no expiry date is set, the alert message will be displayed each time the record is accessed until the alert is deleted.

Editing an Alert

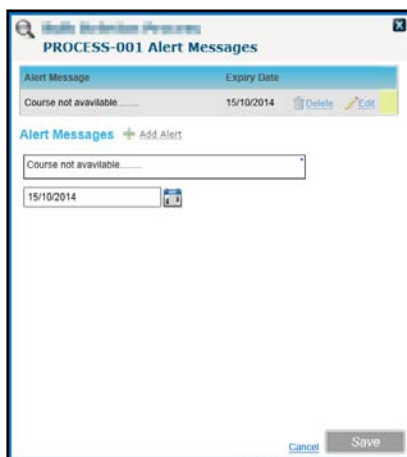
1. Select the required record.



2. Click the **Alert** button to display a list of alerts.



3. Click the **Edit** button to display the alert details.



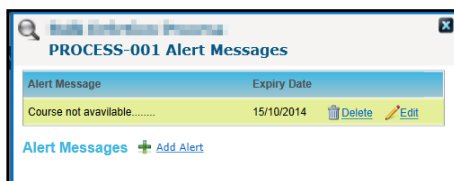
4. The **Alert Message** and **Expiry Date** can be edited.
5. Click the **Save** button.

Deleting an Alert

1. Select the required record.



2. Click the **Alert** button to display a list of alerts.



3. Click the **Delete** button for the alert you wish to delete.

A confirmation message is displayed.

4. Click the **Yes** button.

Generating a Linked Report

A report can be set up as a linked report via the **Reports** focus and linked to a specific area such as a course, instrument, application or trainer.

When you navigate to that area, you can generate the report if you have the necessary permission.

It can then be accessed via the **More Options** drop-down.

1. Click the **More Options** button to display a list of options.
2. Select the **Linked Report** option to display any reports that are linked to this area.
3. Click the **Report Title** to start the report process and display a confirmation dialog.
4. If you want to log the report, click the **Yes** button. You will then be able to access the output report via the report log.

Viewing the Report Log/Re-running a Report

1. Click the **More Options** button to display the drop-down list of options.
2. Click the **View Report Log** option.
3. If required, to re-run the report, click the **Re-run** button.

For more information on using the reports functionality, refer to the following reference guide available on the One Publications website and on My Account:

- RG_Online_Common_Reports

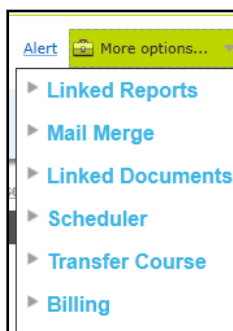
Managing Mail Merge

Mail Merge is enabled in most areas of MusicTuition e.g. Courses, Applications ,Instruments, Ensembles and Trainers. Mail Merge creates a file of exported data on the basis of an SQL Select Query. This file can be imported into a Word document mail merge.

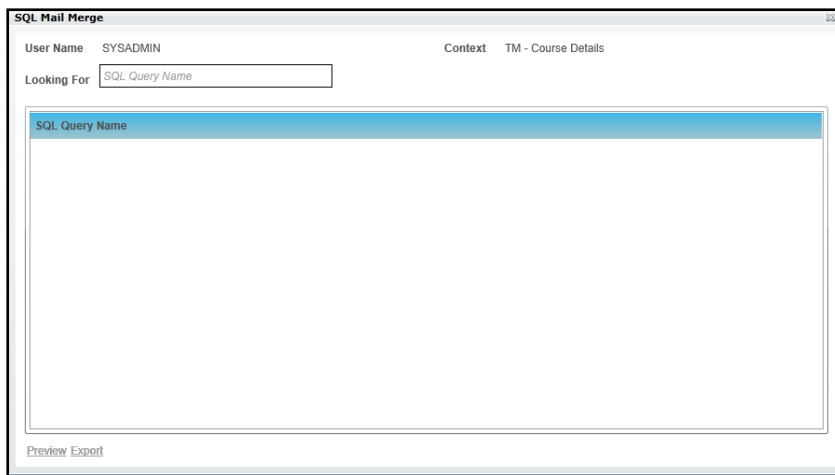
More Information:

The following reference guides are available on the One Publications website and on My Account:
 RG_Online_Administration_SQL Mail Merge
 RG_Online_Common_SQL Mail Merge

1. Search for the required entity to view the details.
2. Click the **More options** button to display the drop-down list of options.



3. Click the **Mail Merge** option and then click the **Mail Merge** link to display the **SQL Mail Merge** dialog.



NOTE: The list of options displayed is managed via **v4 Online | Administration | System Admin | SQL Mail Merge** or in **v4 Client via Tools | Administration | SQL Mail Merge**.

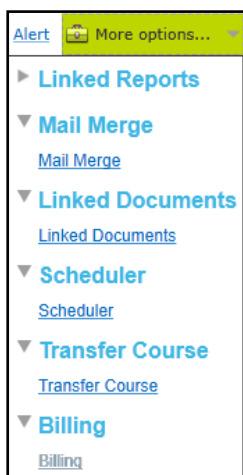
Managing Linked Documents

Documents can be linked to a particular entity. Linked documents can be added in the following areas:

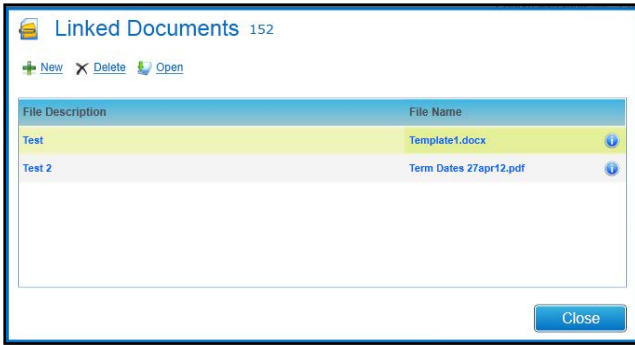
- Training units.
- Courses.
- Applications.
- Trainers.
- Instruments.
- Ensembles.
- Students.
- Invoice Points.
- Nominal Ledgers.

Viewing a Linked Document

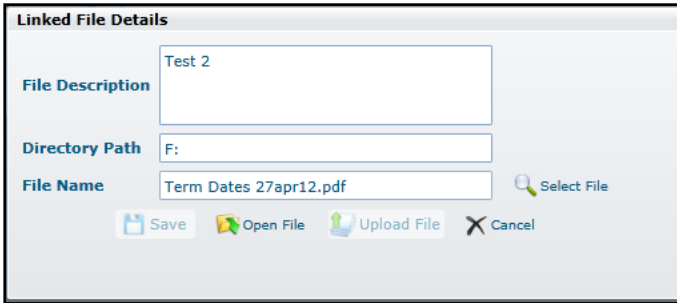
1. Search for the required entity and select it to view the details.
2. Click the **More options** button to display the drop-down list of options.



3. Click the **Linked Documents** link to display the **Linked Documents** dialog.



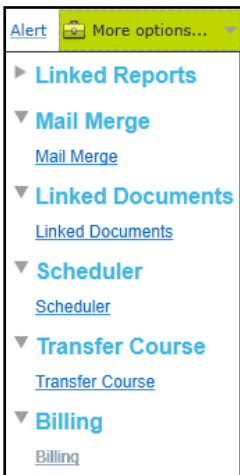
4. Select the required file and click the **Open** button to display the **Linked File Details** window.



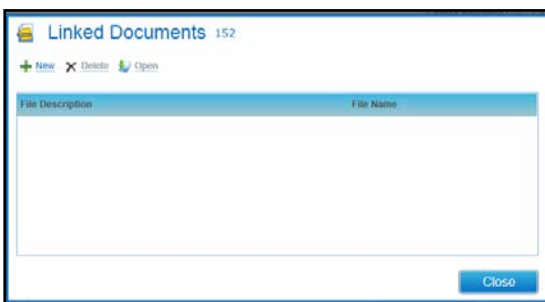
5. Click the **Open File** button.

Adding a New Linked Document

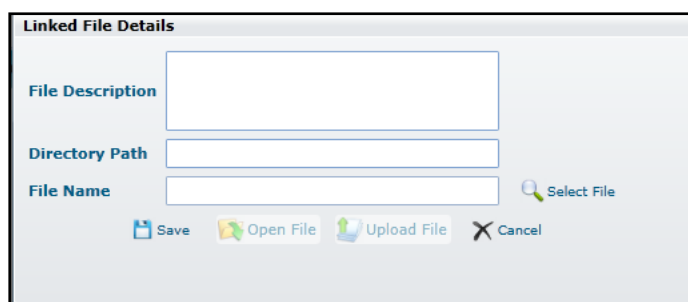
1. Search for the required entity and select it to view the details.
2. Click the **More options** button to display the drop-down list of options.



3. Click the **Linked Documents** link to display the **Linked Documents** dialog.



4. Click the **New** button to display the **Linked File Details** window.



5. Enter a **File Description**.
6. Enter a **Directory Path**.
7. Click the **Select File** button.
8. Select the required document.
9. Click the **Save** button to display a confirmation message:
Do you want to upload the linked document now?
10. Click the **Yes** button.

Scheduling Letters, Emails and SMS

Introduction

In Music Tuition, communications can be scheduled for students who receive tuition and triggered based on a scheduler event. The communication method can be letter, email or SMS. Scheduled emails and SMS texts are automatically logged in a communication log for the training unit. Scheduled emails can have multiple linked documents e.g. pre-course joining instructions and directions. Place holders can be used for key information, such as course name, course dates, applicant name and venue.

Scheduled events can be set up at the training unit, course template and course level. Any scheduled events set up for a training unit or template are default scheduled events which are automatically inherited by any course created within a training unit or cloned from a template. Once the course has been created, the scheduled events at the course level are independent of the inherited events. Therefore, if you edit an event or add an event at the course level, it will not affect the events for the training unit or template. Also, after a course has been created, if a scheduled event is edited or added at the training unit level, this will not cascade to any existing courses, only to new courses created in the future.

Using the Scheduler to Send an Email

The scheduler can be used to send a detailed, customised email by selecting the **Email** radio button and entering the details on the **Email Details** tab. For more information, see [Adding a Scheduled Communication](#) on page 10.

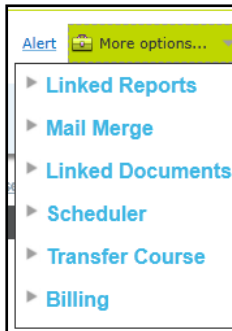
Alternatively, when scheduling a letter or SMS, selecting the **Email Also** check box sends an automatic email to each applicant with the selected **Application Status**. In this case, the email content is not editable. In the case of an SMS, the email and the SMS are sent at the same time and have the same content. In the case of a letter, an automatic email is created when the letter is generated via the **Administration | Training Unit | Printing Pending** tab and a PDF version of the letter is attached to the email.

In all cases, the email is sent to one or more email addresses depending on the options selected on the **Administration | Scheduling** tab. For more information, see [Scheduling Email Options](#) on page 54.

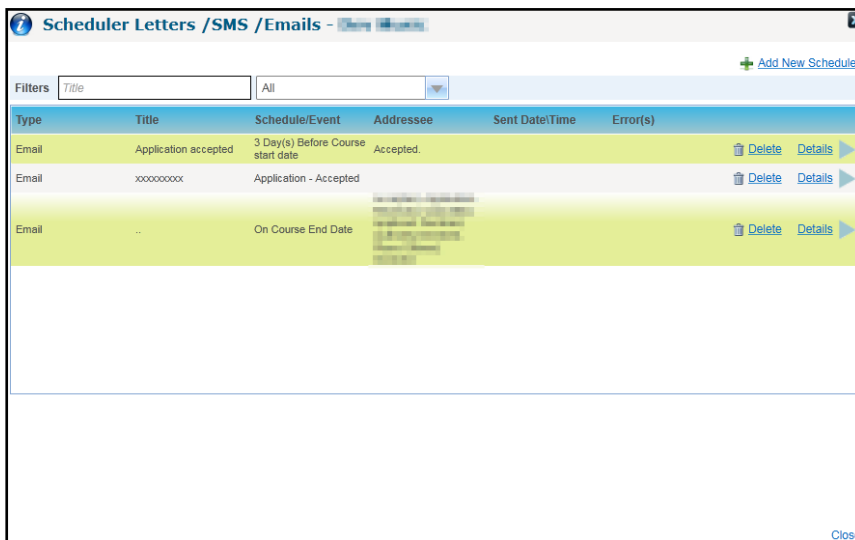
NOTE: If new applicants are added after the scheduled date, an email is sent to the new applicants only.

Viewing the Scheduler

1. Search for a course using either the **All Courses** or **Calendar View** tab.
2. Select the required course to view the details.
3. Click the **More options** button to display the drop-down list of options.



4. Click the **Scheduler** option and then click the **Scheduler** link to display the **Scheduler Letter / SMS / Emails** dialog.



5. Filters can be used to limit the list:
 - Enter a full or partial **Title**.
 - Select a **Type** from the drop-down list.
6. Click the **Details** button to display the **Scheduler Details**.

Adding a Scheduled Communication

This option enables an event to be set up in relation to the course start or end date.

1. View the Scheduler for a Course.
For more information, see [Viewing the Scheduler](#) on page 9.
2. Click the **Add New Scheduler** button to display the **Scheduler Details** page.

3. Click the radio button to select **Letter**, **SMS** or **Email**.

NOTE: Selecting **Email** enables the **Email Details** tab.

4. Enter a **Title**.
5. Click the radio button to select **Schedule**.
6. Enter the number of **Day(s)**.
7. To enable the event to be set up in relation to the course start or end date, select **Scheduled On** from the drop-down list.
8. Select **Event Time** from the drop-down list.
9. Select **Working Days** or **Calendar Days** from the **Day Type** drop-down list.

10. If **Working Days** is selected, click the **Working Hours Base** browse button to display the **Base Search** and select a base.
For more information, see [Selecting a Base](#) on page 107.
11. If required, select the **Email Also** check box (only available if the **Letter** or **SMS** radio button is selected). If selected, an automatic email is sent to each applicant with the selected **Application Status**.
12. Select one or more **Application Status**. The communication will only be sent to applicants with this status.
13. Click the **Save** button.
14. Click the **Finish and Add to Schedule** button.

NOTE: Selecting the **Email Also** check box for a scheduled letter does not enable the **Email Details** tab. An automatic email is created when the letter is generated via the **Administration | Training Unit | Printing Pending** tab. For more information, see [Using the Scheduler to Send an Email](#) on page 8.

Entering SMS details

SMS text messages can be scheduled to be sent to course applicants via a third party SMS text messaging provider (fastsms).

NOTE: If your Local Authority uses another SMS text messaging provider and you would like Music Tuition SMS texts to be sent using that, please discuss this with your Account Manager.

1. Select the **SMS** radio button.
2. Enter a **Course Title**.
3. Select the **Schedule** or **Event** radio button.
4. If required, select the **Email Also** check box (only available if the **Letter** or **SMS** radio button is selected). If selected, an automatic email is sent to each applicant with the selected **Application Status**.
5. Enter the remaining information for this schedule or event.
6. One or more place holders can be inserted into the body of the text:
 - a. Select a **Place Holder** from the drop-down list.
 - b. Click the **Insert Place Holder** button.
7. Enter the **Message**.

8. Click the **Save** button.

- Click the **Finish and Add to Schedule** button.

NOTE: Selecting the **Email Also** check box does not enable the **Email Details** tab. An email and an SMS are sent at the time of the scheduled event. Both have the same content. Alternatively, a more detailed email can be sent by setting up another scheduled communication for the same time as the SMS and selecting the **Email** radio button.

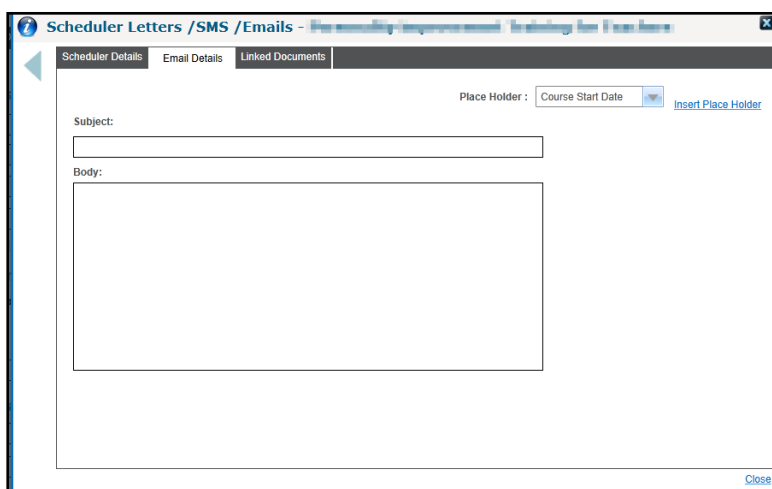
For more information, see [Using the Scheduler to Send an Email](#) on page 8.

Entering Email Details

When the **Email** radio button is selected, the **Email Details** tab is enabled to enter a detailed email message.

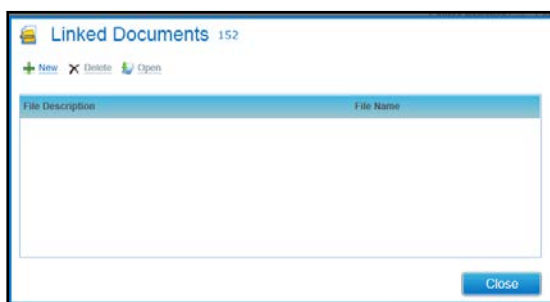
NOTE: The **From** email address for these scheduled communications must be configured in the **CCSServer Config** tool in the **Application Servers | Email Settings** panel using the field, **TM From Address for Email**. If this is not configured, the email will not be sent.

- Select the **Email Details** tab.



- One or more place holders can be inserted into the body of the email:
 - Select a **Place Holder** from the drop-down list.
 - Click the **Insert Place Holder** button.
- A **Subject** can be entered.
- Enter text into the email **Body**.
- Click the **Save** button.
- If required, select the **Linked Documents** tab to display the **Linked Documents** dialog and link one or more documents to the email.

For more information, see [Managing Linked Documents](#) on page 6.



- Click the **Finish and Add to Schedule** button.

For more information, see [Using the Scheduler to Send an Email](#) on page 8

Scheduling a Letter

Letter defaults are set up for a training unit as Crystal Report templates and are then available to select when scheduling a letter for a course defined for the training unit.

For more information, see [Setting Up and Maintaining Training Units](#) on page 16.

1. View the Scheduler for a Course.

For more information, see [Viewing the Scheduler](#) on page 9.

2. Click the **Add New Scheduler** button to display the **Scheduler Details** page.

3. Click the radio button to select **Letter**.
4. Select the required **Title** from the drop-down list of letter defaults.
5. Select the **Schedule** or **Event** radio button.
6. Enter the remaining information for the schedule or event.
7. If required, select the **Email Also** check box to send an automatic email. For more information, see [Using the Scheduler to Send an Email](#) on page 8.
8. Click the **Save** button.
9. Click the **Finish and Add to Schedule** button.

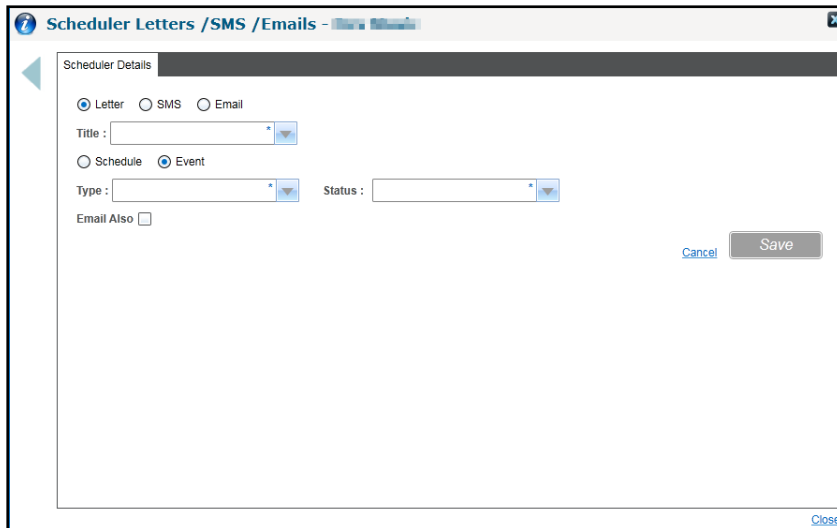
Adding an Event

A scheduled communication can relate to an event such as cancelling a course or updating the status of an application, e.g. an email is sent to confirm a place on a course when the status is updated to accepted.

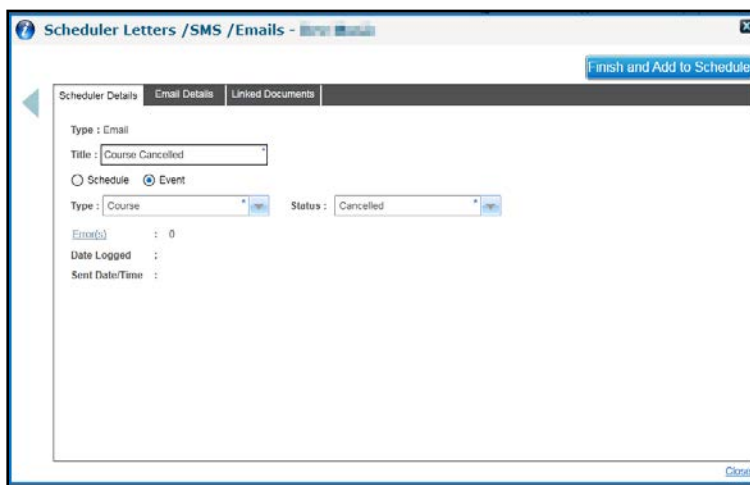
1. Open the scheduler for a course.

For more information, see [Viewing the Scheduler](#) on page 9.

2. Click the **Add New Scheduler** button to display the **Scheduler Details** page.
3. Click the radio button to select **Letter**, **SMS** or **Email**.
4. Select a **Title**.
5. Select the **Event** radio button.



6. Select a **Type** from the drop-down list.
7. Select a **Status** from the drop-down list.
8. If required, select the **Email Also** check box.
9. Click the **Save** button.



10. Click the **Finish and Add to Schedule** button.

Accessing Help and More Information

To access the help file, click the **Help** button.

More Information:

Advice to LAs Migrating Music Tuition Handbook.
Reference Guides are quick high level 'how to' guides outlining specific v4 processes.
These are available on the One Publications website and on My Account.

02 / Setting Up and Administering Music Tuition

Introduction to System Administration



Before using Music Tuition v4 there are certain areas that need to be set up and user permissions must be assigned. The **Administration** area enables the System Administrator to set up and maintain the following information:

- Training Units.
- Venues.
- Organisations.
- People and Roles.
- Course Analysis.
- Invoice Points.
- Nominal Ledger Accounts.
- Discount Defaults.
- Bulk Applications Invoicing
- Migrate Invoice Points
- Scheduling.

Setting up Permissions

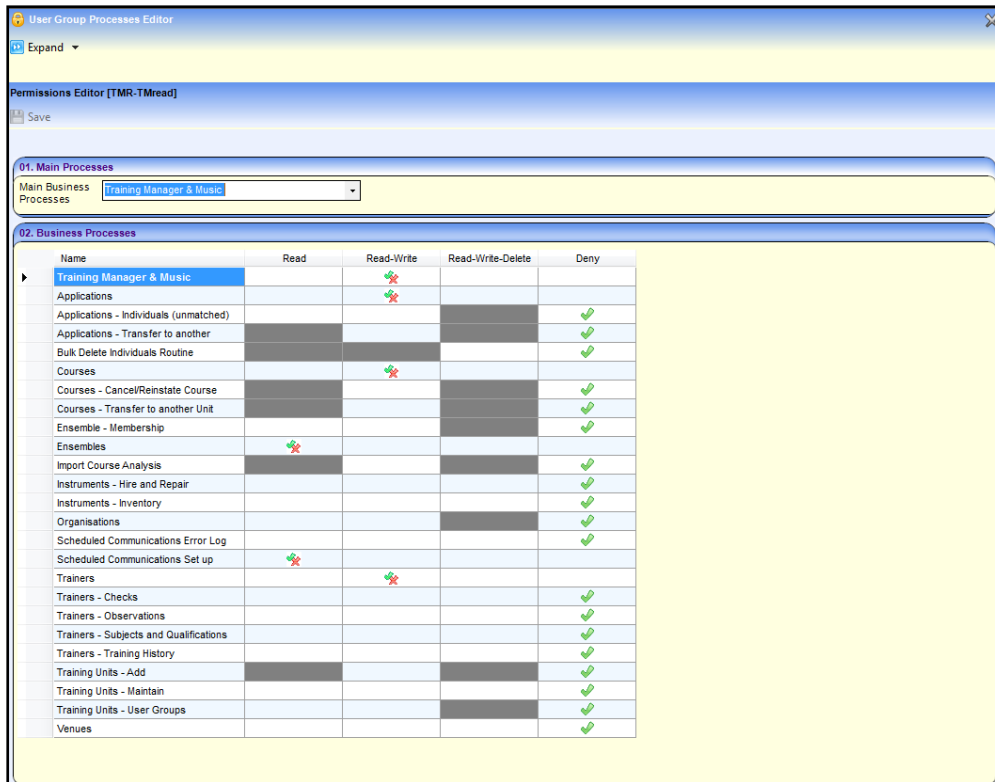
NOTE: For detailed information regarding the permissions required, refer to the *Advice to LAs Migrating Music Tuition handbook* which is available on My Account and on the One Publications website.

System Administrators need to set up user accounts and assign permissions to enable users to access the Music Tuition area of v4.

One user accounts and membership of user groups are set up via the One v4 Client.

Permissions are assigned to groups of users in the v4 Client via **Tools | Permissions | User Group Processes** as shown in the following graphic:

Setting Up and Administering Music Tuition



NOTE: Users cannot access the Music training unit if they are not a member of a user group which has been assigned permissions to it via **v4 Online | Music Tuition | Administration | Training Units | User Group**. This includes System Administrators.

More Information:

Advice to LAs Migrating Training Manager or Music Tuition to v4 handbook
One System – Users, Groups, Permissions handbook
RG_Permissions_User Group Permissions Reference Guide
RG_Permissions_User Group Processes Reference Guide

These are available on the One Publications website (www.onepublications.com) and on My Account.

Setting Up and Maintaining Training Units

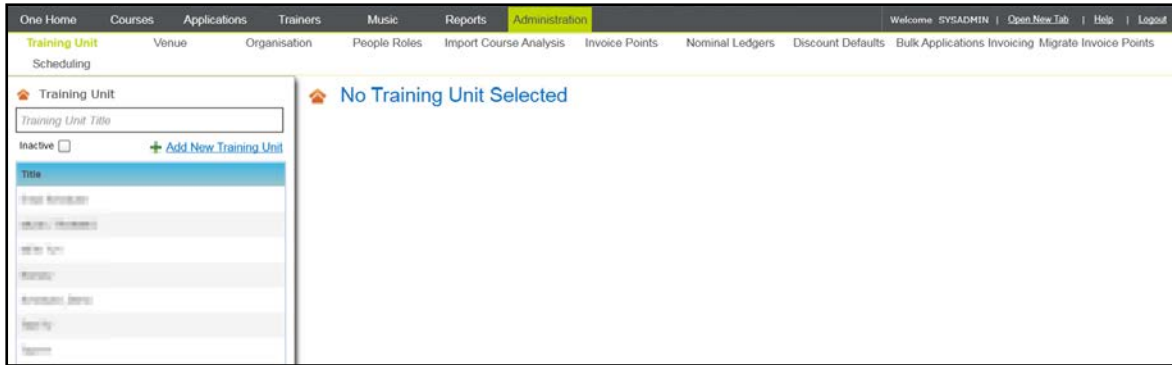
Training units are business units within the local authority that are responsible for managing their own training courses.

A Music Tuition training unit is created when the module is migrated from v3 to v4 or when a v4 license is installed. All music specific courses are administered using this training unit. If your Local Authority also has a licence for Training Manger v4 then, subject to permissions, you will be able to add and update other training units. If there is no Training Manager v4 licence, then only the Music Tuition training unit can be managed.

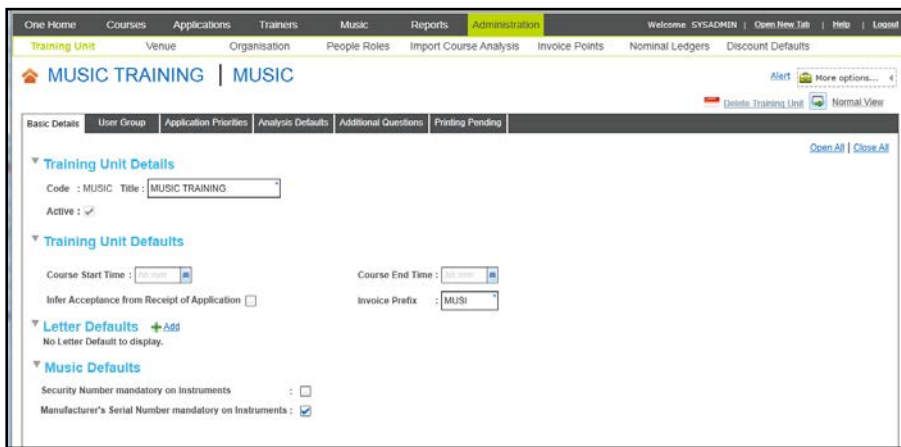
Default values defined for a training unit are applied to all courses created for the training unit.

Viewing a Training Unit

1. Select the **Administration** area.
2. Select the **Training Unit** tab to display the Music Tuition training unit. a list of available training units.

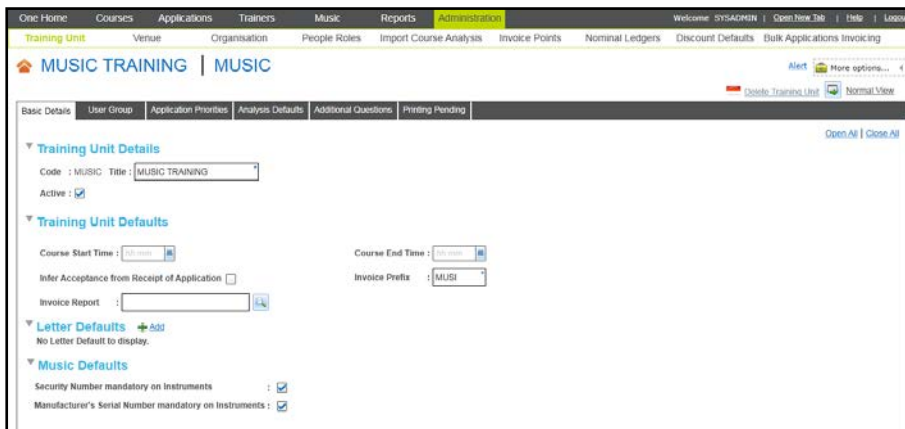


3. If required, select the **Inactive** check box to include training units that are inactive.
4. If required, filter the list by entering one or more characters of the **Training Unit Title**.
5. Click a training unit in the list to display the details.



Editing a Training Unit's Basic Details

1. Select the required Training Unit.
For more information, see [Viewing a Training Unit](#) on page 16.



2. If required, edit the following details on the **Training Unit Details** panel:
 - **Title**.
 - **Active** check box.
3. Click the **Save** button.

Setting Up and Administering Music Tuition

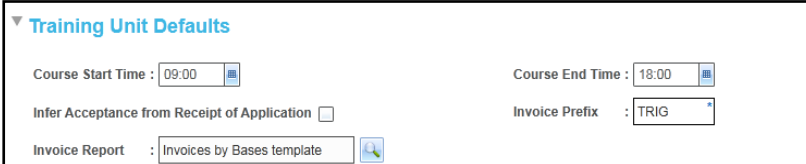
- If required, edit the following details on the **Training Unit Defaults** panel. The training unit defaults pre-populate the information on any courses created in the future under this training unit:

- **Course Start Time.**
- **Course End Time.**
- **Infer Acceptance from Receipt of Application** check box.

NOTE: Selecting the **Infer Acceptance from Receipt of Application** check box accepts applicants onto courses automatically and assigns a status of Application Accepted.

- **Invoice Prefix.**
- **Invoice Report.**

NOTE: The Invoice Report should be used to select the Crystal report template which will be used to generate invoices. This must be set up to expect the Print ID parameter. When generating invoices, the PRINT_ID field is populated automatically. It is passed to the Crystal report in order to populate the template with the selected invoice details.



Training Unit Defaults

Course Start Time : 09:00

Course End Time : 18:00

Infer Acceptance from Receipt of Application

Invoice Prefix : TRIG

Invoice Report : Invoices by Bases template

- Click the **Save** button.
- If required, click the **Add** button to add a new letter default. This is used to set up a Crystal Report that can be selected when defining a schedule:
 - Enter a **Title**.
 - Select a **Report Letter** from the browse of standard report letters.
 - Click the **Save** button.



Letter Defaults + Add

Title	Report Letter
Course Fee	Course Fee Letter

Edit Remove

- If required, click the **Edit** button to update a letter default:
 - Enter a **Title**.
 - Select a **Report Letter** from the browse of standard report letters.
 - Click the **Save** button.
- If required, click the **Remove** button to delete a letter default.
- If required, edit the **Music Defaults** panel:
 - Select or deselect the **Security Number mandatory on Instruments** check box.
 - Select or deselect the **Manufacturer's Serial Number mandatory on Instruments** check box.

Adding a User Group to a Training Unit

When a training unit is created, One automatically creates a user group with the same name. The System Administrator and, if applicable, the user that created the training unit are automatically defined as members of the user group.

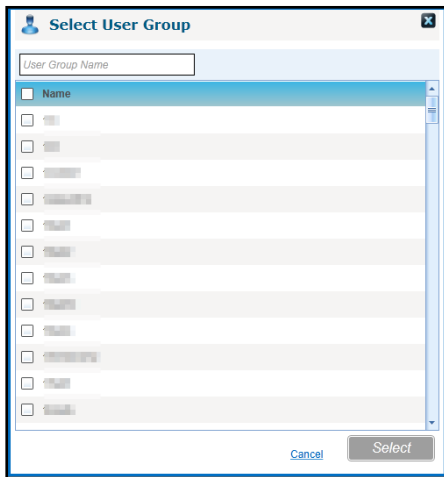
NOTE: When a new user group is created, it is automatically granted read-write access to the **Training Manager and Music** business process. No other permission areas are automatically granted, so the System Administrator should consider what other permissions are required, e.g. under **Student Data**. The System Administrator should consider the access rights to this training unit required by other users and consider adding other user groups to the training unit, or other users to the user group.

Additional user groups can be added to a training unit as follows:

1. Select the required training unit to display the details.
For more information, see [Viewing a Training Unit](#) on page 16.
2. Select the **User Group** tab to display the user groups with access to this training unit.



3. Click the **Add** button to display the **Select User Group** window.



4. If required, enter a partial **User Group Name** to filter the list.
5. Select one or more check boxes to select the required user groups.
6. Click the **Select** button.

NOTE: Only users in user groups with access rights to the training unit are able to view and edit courses managed by that training unit.

Removing a User Group from a Training Unit

The original user group, which is created automatically when the training unit is defined, cannot be removed, although its permissions can be reduced and updated via v4 Client. Other manually-defined user groups can be removed as follows:

1. Select the required training unit to display the details.
For more information, see [Viewing a Training Unit](#) on page 16.
2. Select the **User Group** tab to display the user groups with access to this training unit.
3. Click the **Remove** button adjacent to the user group.
A confirmation message is displayed.
4. Click the **Yes** button to remove the user group from the training unit.

Adding Application Priorities

An application priority can be defined for a base or school. Any application received for that base or school, for any course under the given training unit, is given this application priority. This is displayed on the application and can be manually reviewed for oversubscribed courses to decide which applicants to offer a place. Also if the base is selected as an invoice point, this application priority is applied.

NOTE: Application priorities values are configured by a locally configurable Application Priorities lookup that can be managed via **v4 Client | Tools | Lookups** (Table ID: 0402).

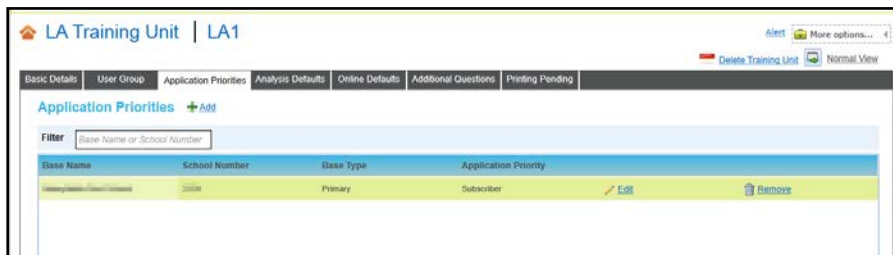
To add a new application priority:

1. Select a training unit to display the details.
For more information, see [Viewing a Training Unit](#) on page 16.
2. Select the **Application Priorities** tab.
3. Click the **Add** button.
4. Click the **Base Name** browse button to display the **Base Search** dialog and select a base.
For more information, see [Selecting a Base](#) on page 107.
5. Select an **Application Priority** from the drop-down list.
6. Click the **Save** button.

Editing Application Priorities

The application priority can be edited by choosing a different value from the drop-down list.

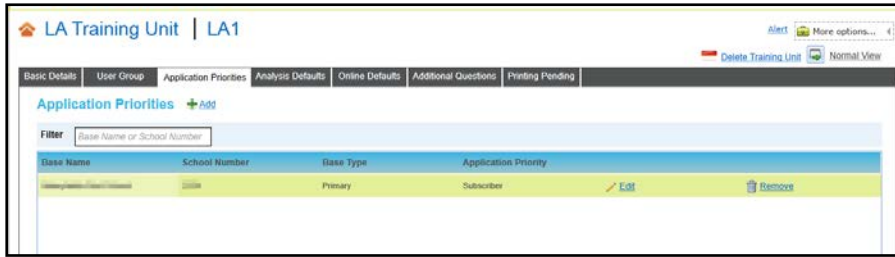
1. Select a training unit to display the details.
For more information, see [Viewing a Training Unit](#) on page 16.
2. Select the **Application Priorities** tab.



3. Click the **Edit** button.
4. Select an **Application Priority** from the drop-down list.
5. Click the **Save** button.

Removing Application Priorities

1. Select a training unit to display the details.
For more information, see [Viewing a Training Unit](#) on page 16.
2. Select the **Application Priorities** tab.



3. Click the **Remove** button.
A confirmation message is displayed.
4. Click the **Yes** button to remove the application priority from the training unit.

Adding Analysis Defaults

Course attendees can be asked to provide graded responses to a series of pre-defined criteria as part of their course feedback. The criteria are defined via the **Analysis Defaults** tab and are inherited by all courses and course templates created for the training unit.

1. Select a training unit to display the details.
For more information, see [Viewing a Training Unit](#) on page 16.
2. Select the **Analysis Defaults** tab.
3. Click the **Add** button.
4. Enter a **Criteria Label**.
5. Select a **Criteria Type** from the drop-down list.
6. Click the **Save** button.

Deleting Analysis Defaults

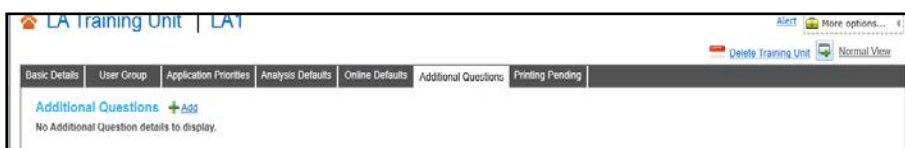
If the analysis defaults have been used in a course analysis, the delete button is disabled and they cannot be deleted. To delete other analysis defaults:

1. Select a training unit to display the details.
For more information, see [Viewing a Training Unit](#) on page 16.
2. Select the **Analysis Defaults** tab.
3. Click the **Delete** button.
A confirmation message is displayed.
4. Click the **Yes** button to delete the analysis default.

Adding Additional Questions for a Training Unit

Additional questions that you want to ask course applicants can be defined for a training unit. They will be inherited by any courses or course templates created for the training unit.

These questions can be set up to capture applicant's special needs when attending training courses e.g. dietary requirements, special access needs.

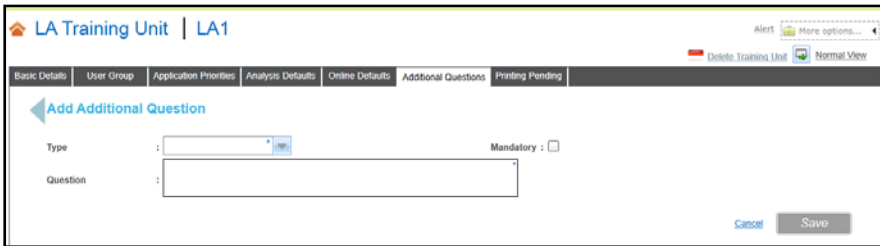


1. Select a training unit to display the details.

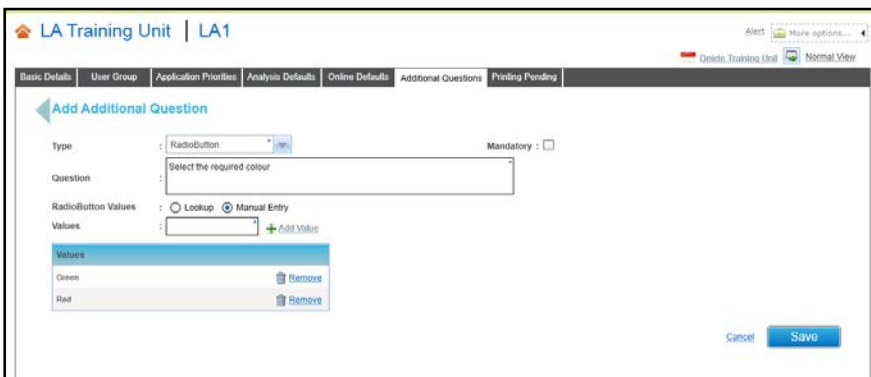
Setting Up and Administering Music Tuition

For more information, see [Viewing a Training Unit](#) on page 16.

2. Select the **Additional Questions** tab.
3. Click the **Add** button to display the **Add Additional Question** page.



4. Select a **Type** from the drop-down.
5. Enter the **Question**.
6. If required, select the **Mandatory** check box.
7. Enter other details depending on the **Type** as shown in the following graphic:



8. Click the **Save** button.

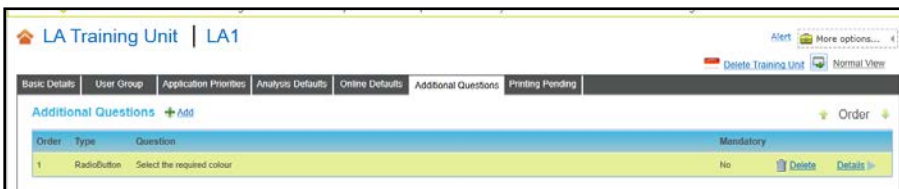
Editing Additional Questions for a Training Unit

To edit the additional questions for a training unit:

1. Select a training unit to display the details.

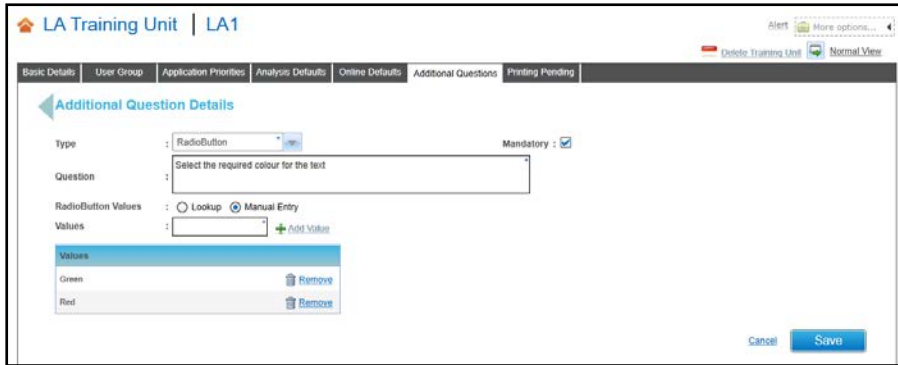
For more information, see [Viewing a Training Unit](#) on page 16.

2. Select the **Additional Questions** tab.



Order	Type	Question	Mandatory
1	RadioButton	Select the required colour	No

3. Click the **Details** button to display the **Additional Question Details** page.



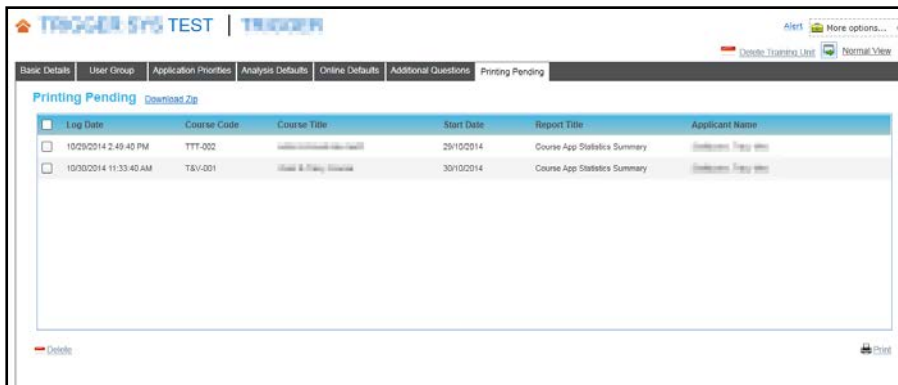
4. Edit the details of the question as required.
5. Click the **Save** button.

Managing Pending Prints

When a letter is triggered by the scheduler for a course, it placed in the printing pending queue for the training unit.

Reports that are pending for the training unit can be viewed as follows:

1. Select a training unit to display the details.
For more information, see [Viewing a Training Unit](#) on page 16.
2. Select the **Printing Pending** tab to display any pending prints for the training unit.



Generating Letters

When you generate a letter, One generates each report and converts it to PDF format. It is logged against the application as a Linked Report and a zip file is created. The report is automatically removed from the printing pending queue after it is converted to PDF.

NOTE: There is a maximum number of reports that can be generated. This limit is set in the Application server (application.ini file) and is initially set to 20. To ensure users achieve optimum performance when running this routine, the maximum limit can be configured by the Local Authority in the CCSServer Config tool. This is configured in the **Application Servers | Application Server Settings** panel using the field, **Maximum Number of Scheduled Letters for Printing**.

1. Select the check box adjacent to each report for which you want to generate a letter.
2. Click the **Print** button.

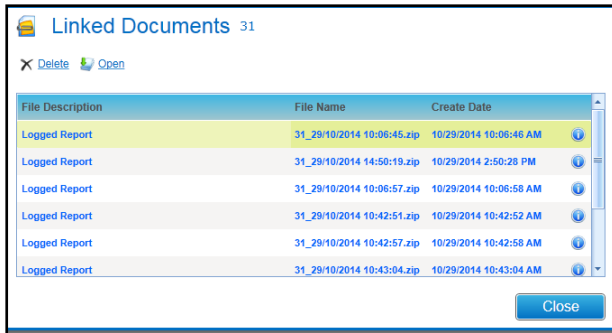
An error message is displayed if the maximum number of items is exceeded.

When the reports are converted to PDFs, a completion message is displayed.

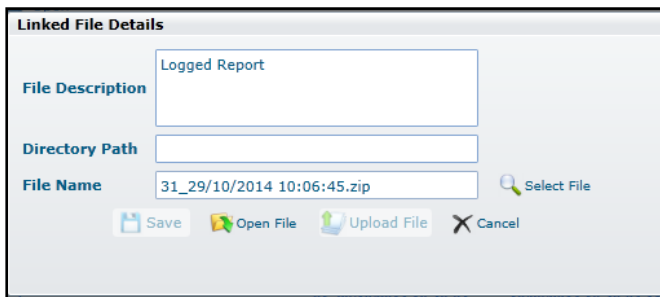
Printing the Letters

After the letters have been generated, you can download the PDFs for printing and distribution.

1. Click the **Download Zip** button to display the **Linked Documents** window.



2. Select a report and click the **Open** button to display the **Linked File Details**.



3. Click the **Open File** button and save the zip file.

The saved file can be unzipped to print the individual letters.

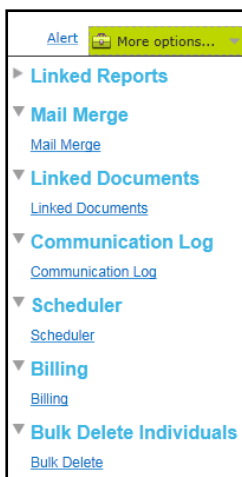
Managing a Training Unit's Communication Log

When the scheduler is used to send out emails or SMS messages these are automatically logged in the Communication Log for the training unit. These communications can be viewed and new communication items can be added.

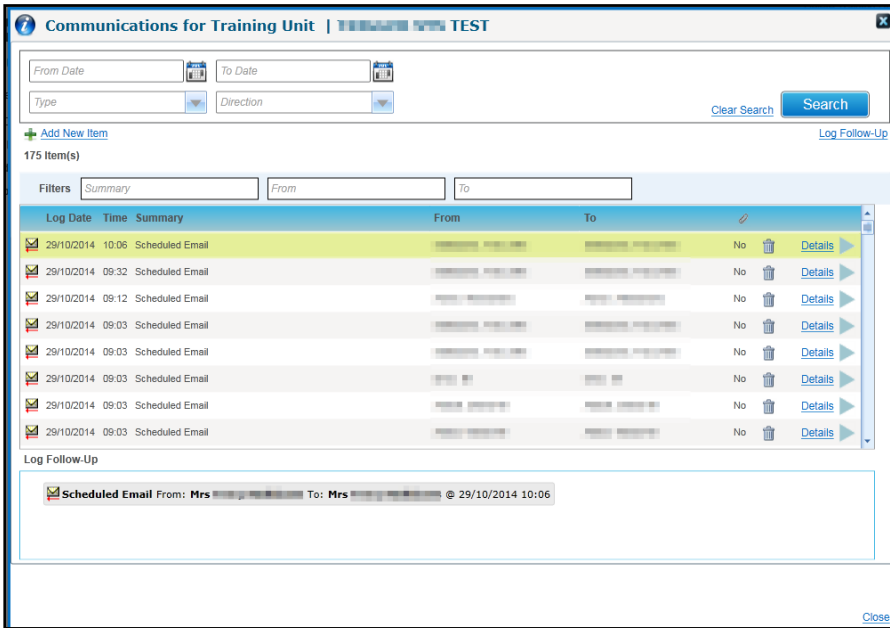
Viewing the Communication Log

The details of those communications can be viewed as follows:

1. Select a training unit to display the details. For more information, see [Viewing a Training Unit](#) on page 16.
2. Click the **More Options** button.

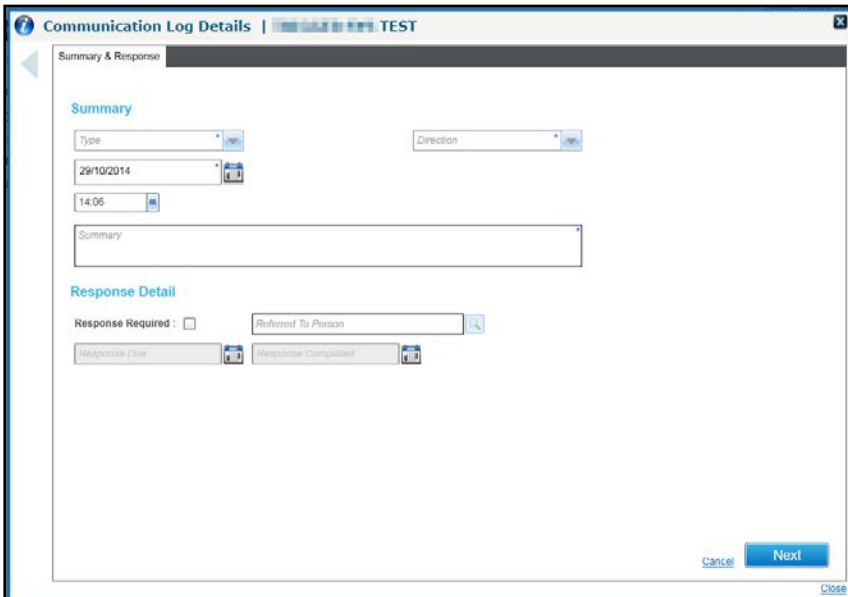


- Click the **Communication Log** link to display the **Communications for Training Unit** window.

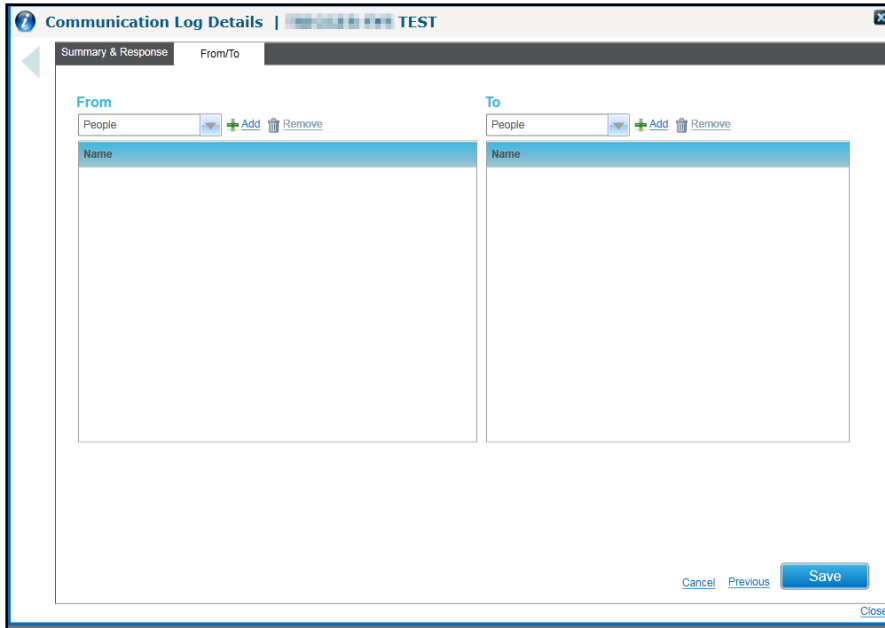


Adding a New Item to the Communication Log

- Click the **Add New Item** button to display the **Communication Log Details** screen.



- Select a **Type** from the drop-down list.
- Select a **Direction** from the drop-down list.
- Select a **Log Date** and **Time**, if different from the current date and time.
- Enter a **Summary**.
- If required, select the **Response Required** check box and select a **Referred To Person**.
- Click the **Next** button to display the **From/To** panel.



8. Select the person or entity that the communication is **From** and **To**:
 - a. Select a **From** type from the drop-down list and click the **Add** button to display the relevant search dialog.
 - b. Search and select the person or entity.
 - c. Select a **To** type from the drop-down list and click the **Add** button to display the relevant search dialog.
 - d. Search and select the person or entity.
9. Click the **Save** button.

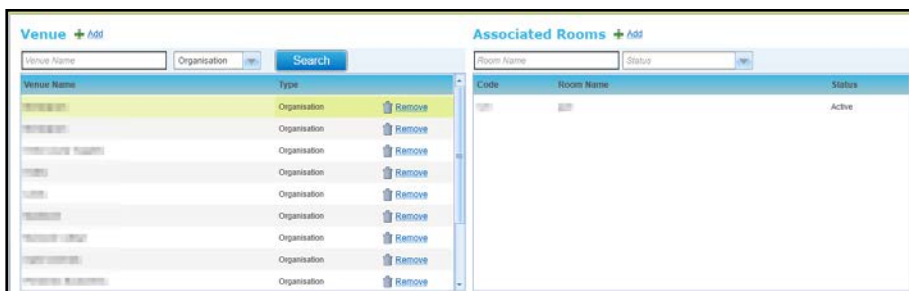
Setting Up and Maintaining Venues

Venues and rooms where courses are held are set up and maintained via the **Venue** tab in the **Administration** area.

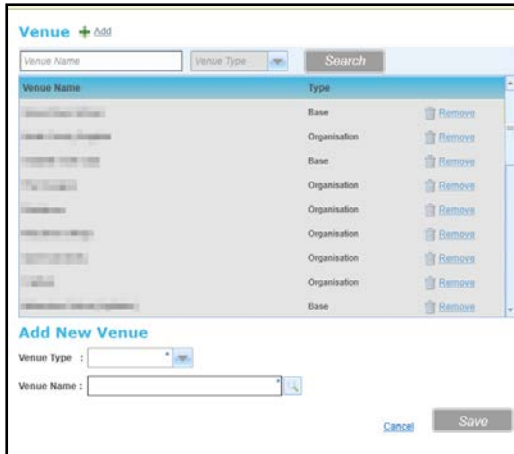
NOTE: A new venue can be added on an ad hoc basis when searching for a venue during the input of course details.

Setting up a New Venue

1. Select the **Administration** area.
2. Select the **Venue** tab.



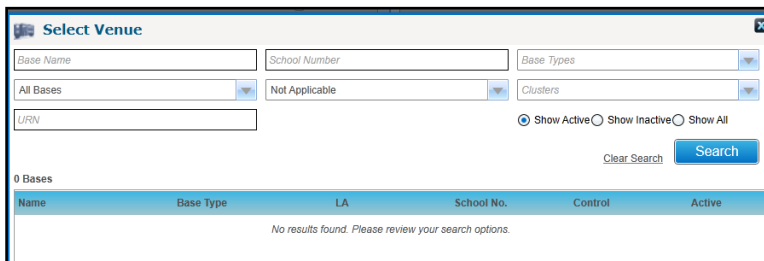
3. On the **Venue** panel, click the **Add** button to display the **Add New Venue** panel.



4. Select a **Venue Type** from the drop-down list.

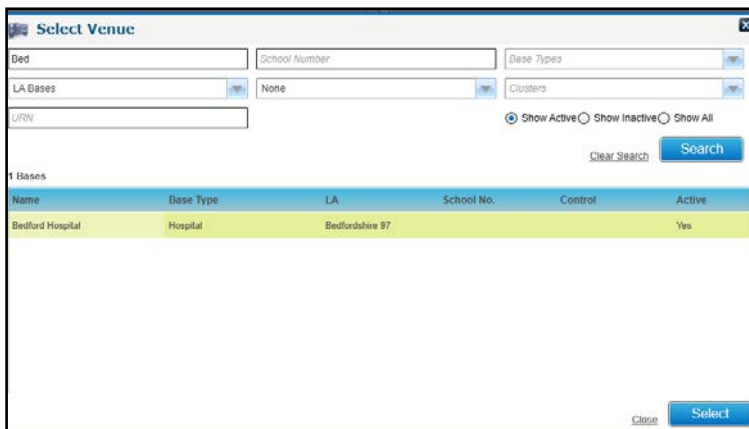
If the **Venue Type** is **Base**:

a. Click the **Venue Name** browse button to display the **Select Venue** dialog:



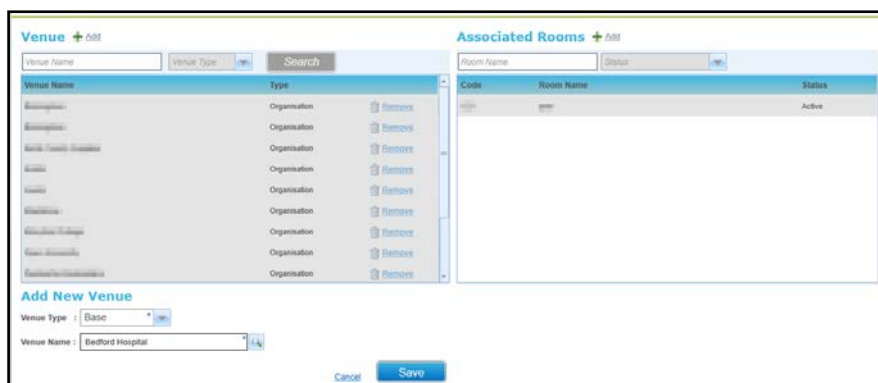
b. Enter the required search criteria.

c. Click the **Search** button.



d. Select the required venue and click the **Select** button.

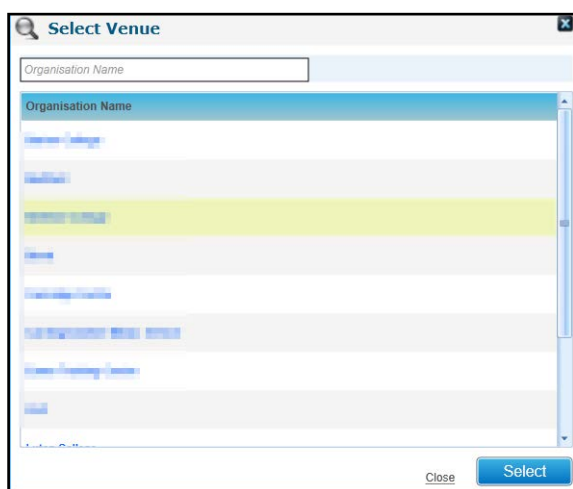
Setting Up and Administering Music Tuition



e. Click the **Save** button.

If the **Venue Type** is **Organisation**:

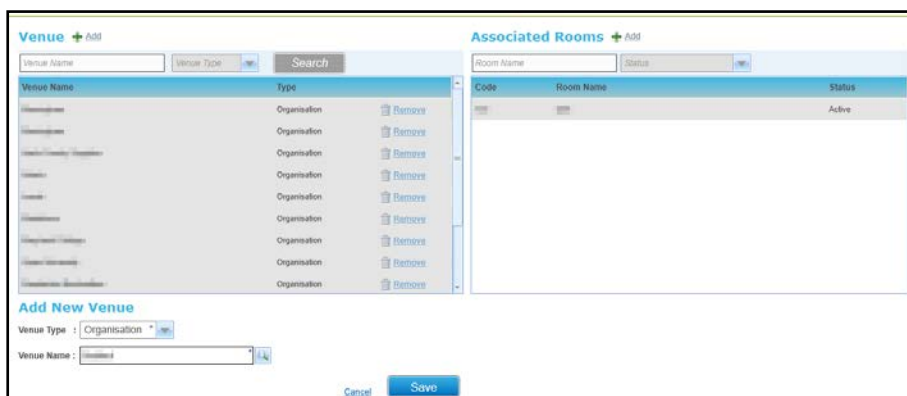
a. Click the **Venue Name** browse button to display the **Select Venue** dialog:



b. If required, enter a full or partial **Organisation Name** to filter the list

c. Select the required organisation.

d. Click the **Select** button.



e. Click the **Save** button.

NOTE: If the required organisation is not in the list, it can be added. For more information, see [Adding a New Organisation](#) on page 30.

Adding a Room to a Venue

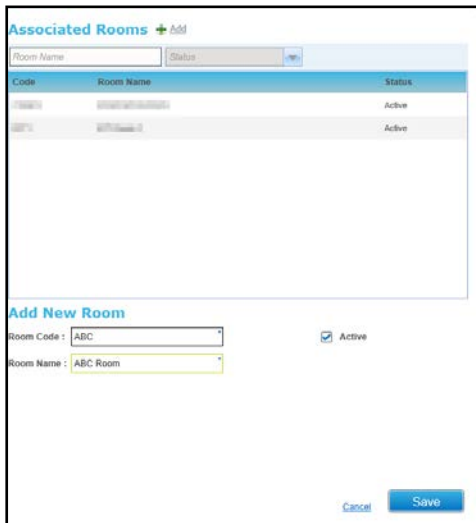
1. Open the list of venues.

For more information, see [Viewing a List of Venues](#) on page 30.

2. Select the required venue in the list.



3. In the **Associated Rooms** area of the page, click the **Add** button to display the **Add New Room** dialog.



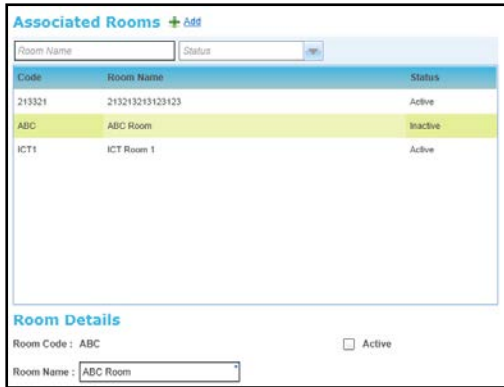
4. Enter a **Room Code** and a **Room Name**.
5. Click the **Save** button.

Making a Room Inactive (Unavailable)

If a room is no longer available, the status can be updated to make to make it inactive.

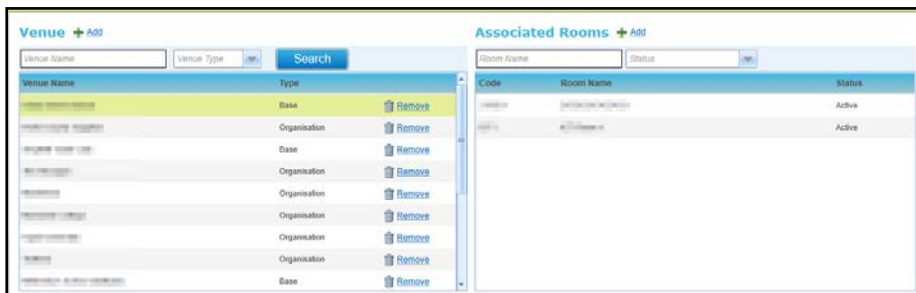
1. Open the list of venues.
For more information, see [Viewing a List of Venues](#) on page 30.
2. Select the required venue in the list.
3. Select the required room to display the **Room Details** panel.
4. Deselect the **Active** check box.
5. Click the **Save** button.

Setting Up and Administering Music Tuition



Viewing a List of Venues

1. Select the **Administration** area.
2. Select the **Venue** tab to display a list of all available venues.
3. If required, enter a full or partial **Venue Name** or select a **Venue Type** from the drop-down list.
4. Click the **Search** button to display matching **Venues**.
5. Select a venue to display **Associated Rooms**.

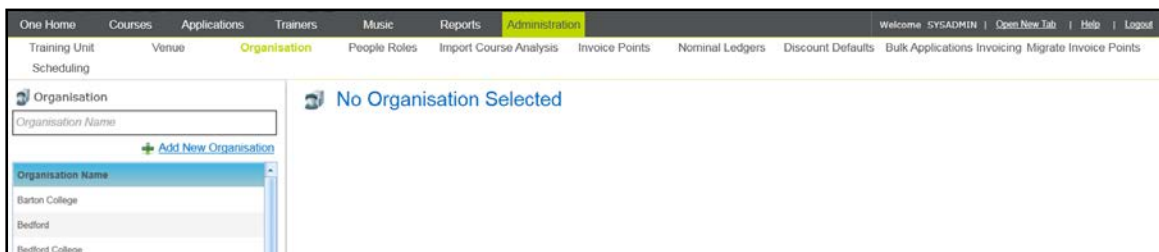


Setting Up and Maintaining Organisations

An organisation is an external venue for a course. Organisations are maintained via the **Organisations** tab in the **Administration** area. After an organisation has been defined it is available for selection as a venue.

Adding a New Organisation

1. Select the **Administration** area.
2. Select the **Organisation** tab to display a list of all available organisations.



3. Click the **Add New Organisation** button to display the **Organisation** dialog.

4. Enter an **Organisation Name**.
5. Click the browse button to select a **Contact Name** using **Person Search**. For more information, see [Selecting a Person using Person Search](#) on page 32.
6. If required, select an **Address** and enter contact details.
7. If required, enter **VAT Number** and **Invoice Prefix**.
8. Click the **Save** button.

Viewing Details of an Organisation

1. Select the **Administration** area.
2. Select the **Organisation** tab to display a list of all available organisations.
3. If required, filter the list by entering a full or partial **Organisation Name**.

4. Select an organisation in the list to display the details.

Editing Details of an Organisation

1. Select the required organisation.
For more information see [Viewing Details of an Organisation](#) on page 31.
2. Enter new details:
 - a. Click the browse button to select a new **Contact Name** using **Person Search**. For more information, see [Selecting a Person using Person Search](#) on page 32.
 - b. If required, enter select an **Address** and enter contact details.
 - c. If required, enter **VAT Number** and **Invoice Prefix**.
3. Click the **Save** button.

Adding Contact Details for an Organisation

1. Select the required organisation.

For more information, see [Viewing Details of an Organisation](#) on page 31.

2. Click the **Add** button in the **Contact Details** panel to display the **Person Search** screen and select the required contact. For more information, see [Selecting a Person using Person Search](#) on page 32.
3. Select the required person to display them on the **Contact Details** panel.

Removing Contact Details for an Organisation

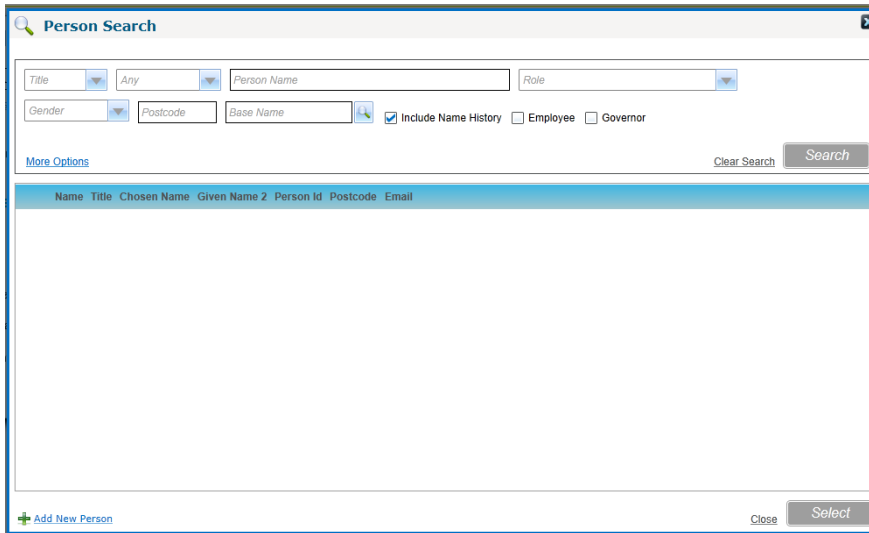
1. Select the required organisation.

For more information see [Viewing Details of an Organisation](#) on page 31.

2. On the **Contact Details** panel, click the **Remove** button to display a confirmation message.
3. Click the **Yes** button to remove the contact details for the organisation.

Selecting a Person using Person Search

The **Person Search** dialog is used to find person details stored on the One database.



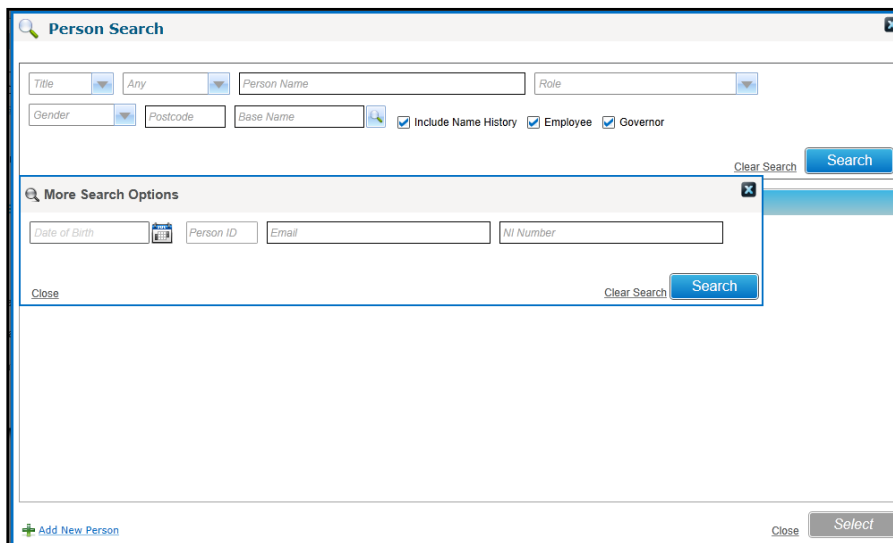
1. Enter search criteria as required.

NOTES: If you select a **Base Name** the person search retrieves records for current or future base contacts, Personnel service records and governors with current or future appointments for the Governing Body linked to that base.

The **Employee** check box is only visible to users with a Personnel module license.

The **Governors** check box is only visible to users with a Governors module license.

You can click the **More Options** button to display the **More Search Options** dialog and search on **Date of Birth, Person ID, Email address and NI Number.**



2. Click the **Search** button to display a list of matching people on the One database.

Setting Up and Administering Music Tuition

Person Search

Mr Any Person Name Admin Officer - ADM

Gender Postcode Include Name History Active

More Options Clear Search Search

7 People matching "Mr, Admin Officer, Active People, Include Name History"

Name	Title	Chosen Name	Given Name 2	Person Id	Postcode
[icon] [Name]	Mr	[Name]	[Name]	[ID]	[Postcode]
[icon] [Name]	Mr	[Name]	[Name]	[ID]	[Postcode]
[icon] [Name]	Mr	[Name]	[Name]	[ID]	[Postcode]
[icon] [Name]	Mr	[Name]	[Name]	[ID]	[Postcode]
[icon] [Name]	Mr	[Name]	[Name]	[ID]	[Postcode]
[icon] [Name]	Mr	[Name]	[Name]	[ID]	[Postcode]
[icon] [Name]	Mr	[Name]	[Name]	[ID]	[Postcode]

Add New Person Close Select

3. Select the required person.

If you are selecting a person as a course applicant, the **Search** button changes to display **Freeze & Search** enabling you to search for another person.

NOTE: The Freeze & Search functionality enables you to search for and select multiple records with multiple criteria.

4. Click the **Select** button.

Maintaining People and Roles

The **People Roles** area enables you to maintain the details of roles used in Music Tuition and add or remove the people associated with the roles. Some roles are system defined and additional roles can be added.

Adding a New Role

1. Select the **Administration** area.
2. Select the **People Roles** tab to display a list of all available **Roles** and **Associated People**.
3. Click the **Add New People Role** button to display blank fields in the **Role Details** panel.

Roles

Role or Description Search + Add New People Role

Role Code	Description	Edit	Delete
[Code]	[Description]	[Edit]	[Delete]
[Code]	[Description]	[Edit]	[Delete]
[Code]	[Description]	[Edit]	[Delete]

Role Details

Role Code [Dropdown]

Description [Text]

Remarks [Text]

Type [Dropdown] System Defined

Cancel Save

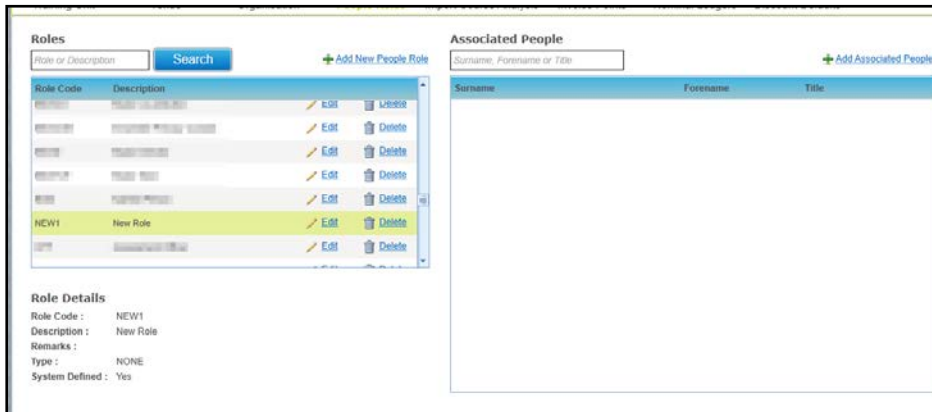
Associated People

Surname, Forename or Title + Add Associated People

Surname	Forename	Title	Remove
[Surname]	[Forename]	[Title]	[Remove]
[Surname]	[Forename]	Mrs	[Remove]
[Surname]	[Forename]	Mr	[Remove]

4. Enter a **Role Code**.
5. If required, add a **Description** and **Remarks**.
6. If required, select a **Type** from the drop-down list.

7. If required, select the **System Defined** check box.
8. Click the **Save** button.

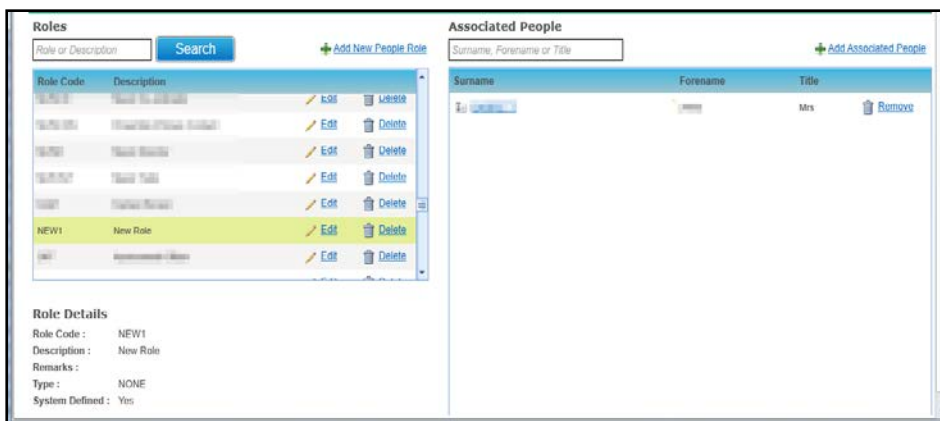


Deleting a Role

1. Select the required role.
For more information, see [Viewing Roles and Associated People](#) on page 36.
2. Click the **Delete** button to display a confirmation message.
3. Click the **OK** button to delete the role.

Adding a New Person to a Role

1. Select the required role.
For more information, see [Viewing Roles and Associated People](#) on page 36.
2. Click the **Add Associated People** button to display the **Person Search** dialog.
3. Search for the required person and click the **Select** button.
For more information, see [Selecting a Person using Person Search](#) on page 32.



Removing a Person from a Role

1. Select the required role.
For more information, see [Viewing Roles and Associated People](#) on page 36.

Setting Up and Administering Music Tuition

Roles

Role Code: sch Search Add New People Role

Role Code	Description	Edit	Delete
SCHSEC	School Secretary	Edit	Delete

Associated People

Surname, Forename or Title Add Associated People

Surname	Forename	Title	Remove
			Remove
		Mrs	Remove
		Mr	Remove

Role Details

Role Code : SCHSEC
 Description : School Secretary
 Remarks :
 Type : SCHOOL
 System Defined : Yes

2. Locate the required person in the list of **Associated People**.
3. Click the **Remove** button to display a confirmation message.
4. Click the **OK** button to remove the person from the role.

Viewing Roles and Associated People

1. Select the **Administration** area.
2. Select the **People Roles** tab to display a list of all available **Roles** and **Associated People**.

Roles

Role or Description Search Add New People Role

Role Code	Description	Edit	Delete
13331		Edit	Delete
ZWWGEG		Edit	Delete
A		Edit	Delete
AAA		Edit	Delete
AAWCON		Edit	Delete
AAWCP	Adult Advice Worker (CP)	Edit	Delete
AAWLC	Adult Advice Worker (LC)	Edit	Delete

Associated People

Surname, Forename or Title Add Associated People

Surname	Forename	Title	Remove
---------	----------	-------	--------

Role Details

Role Code : 13331
 Description :
 Remarks :
 Type : NONE
 System Defined : No

3. If required, enter a partial **Role** or **Description**.
4. Click the **Search** button to display a list of matching roles.
5. Select a role in the list to display the **Associated People**.

Roles

Role or Description Search Add New People Role

Role Code	Description	Edit	Delete
AAWCON	Ajdsjadfff	Edit	Delete
AAWCP	Adult Advice Worker (CP)	Edit	Delete
AAWLC	Adult Advice Worker (LC)	Edit	Delete
AAWLEA	Adult Advice Worker (LEA)	Edit	Delete

Associated People

Surname, Forename or Title Add Associated People

Surname	Forename	Title	Remove
---------	----------	-------	--------

Role Details

Role Code : AAWLC
 Description : Adult Advice Worker (LC)
 Remarks :
 Type : NONE
 System Defined : Yes

Importing Course Analysis

Course analysis is produced using the graded responses received from course attendees to pre-defined criteria.

Course analysis is imported as a .csv file as follows.

The .csv file to be imported should be set up with a row for each record as follows:

- User Event
- Occur Id
- Course Analysis score (as defined in **Course Analysis Details** via **Administration | Training Unit**).

NOTE: User Event and Occur Id are combined to create the course code and compared with the Courses table to find the course.

1. Select the **Administration** area.
2. Select the **Import Course Analysis** tab.
3. Click the browse button to select an **Import File**.
4. Click the **Process** button.

Maintaining Invoice Accounts

Supplier and customer invoice accounts are maintained via the **Invoice Points** tab page. Customer accounts are for students, parents, schools, governing bodies, ensembles and other organisations where financial transactions are raised. Supplier accounts are for those or who can submit invoices to the local authority for expenses relating to music lessons, instrument hire and repair etc.

NOTE: Invoice accounts are referred to as Invoice Points.

Adding an Invoice Point

1. Select the **Administration** area.
2. Select the **Invoice Points** tab.
3. Click the **Add New Invoice Point** button to display the **Add New Invoice Point** screen.

4. Select an **Account Type** from the drop-down list.

5. Search for the appropriate **Account Point**.
6. Enter the remaining invoice point details depending on the **Account Type**. Possible **Account Types** are **Base, Early Years Provider, Employee, Governing Body, Governor, Individual, Organisation and Person**.
7. Click the **Save** button.

Entering Invoice Point Details

For account types such as a Base, an account point is selected from the appropriate browse.

1. Click the **Account Point** browse button to display a dialog e.g. Base Search.
2. Select the required name.
If the selected account point is already assigned to a different cost centre, a confirmation message is displayed. Click the **Yes** button to add your cost centre to the selected account point.
3. If required, enter a **Description**.
4. Select a **Ledger Type** from the drop-down list. For more information, see [Selecting a Ledger Type](#) on page 39.
5. If required, enter an **External Customer Reference** or **External Supplier Reference**.
6. If required, select a **Discount Schema** to be associated with this invoice point. If selected, this discount schema is applied to all transactions raised for this invoice point.
7. Select the required **Primary Cost Centre** radio button.

If you select the **Selected Cost Centres Only** radio button, you will be prompted to add the required cost centres. For information, see [Adding Cost Centre Details](#) on page 40.

NOTE: *There is a hierarchy of discounts that are applied.*
For more information, see [Managing Discounts](#) on page 41.

Entering Finance Contact Details

Finance contact details for bases are maintained as additional contact information.

Finance contact details can be entered as follows:

1. Click the **Contact Person** browse button to display the **Person Search** dialog and select a person to be the finance contact.

For more information, see [Selecting a Person using Person Search](#) on page 32.

Alternatively, if you do not wish to record the contact person on the One database, you can enter the details as free text.

2. Click the **Address** browse button to display the Address Manager dialog.
For more information, see [Selecting an Address](#) on page 41.
3. Enter a **Telephone number, Fax number** and **Email** address.
4. Click the **Save** button.

Selecting a Ledger Type

Based on the **Ledger Type** selected, **Customer**, **Supplier** or **Customer and Supplier**, the following fields will be made active:

- If a ledger type of **Customer** is selected, you are only able to create sales related transactions e.g. sales orders, sales invoices etc. for the particular invoice point. Also, only the **External Customer Reference** field is enabled.
- If a ledger type of **Supplier** is selected, you are only able to create purchase related transactions e.g. purchase orders, purchase invoices etc. Also, only the **External Supplier Reference** field is enabled.
- If ledger type of **Customer and Supplier** is selected you are able to raise any transaction types. Both the **External Customer Reference** and **Supplier Customer Reference** fields are enabled.

Selecting an Invoice Point

1. Select the **Administration** area.
2. Select the **Invoice Points** tab.
3. Enter the required search criteria.
4. Click the **Search** button to display a list of matching invoice points.

5. Select the required invoice point in the list to display the **Account Details**.

Editing Invoice Account Details

1. Select the required invoice account to display the account details.

For more information, see [Selecting an Invoice Point](#) on page 39.

2. Edit the details of the account as described in [Adding an Invoice Point](#) on page 37.
3. Click the **Save** button.

Adding Cost Centre Details

The **Cost Centre Details** panel displays current cost centres for this account.

NOTE: The Music Tuition module uses only the Music Training Unit.

A new cost centre can be added as follows:

1. Click the **Add** button to display the **Select Cost Centre** window. The list of cost centres includes all training units. It is managed as a lookup table (*Table ID: 1191*).

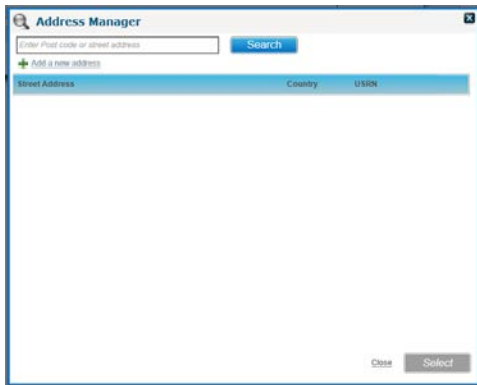
2. Select the check box for the required cost centre in the list.
3. Click the **Select** button.

Removing Cost Centre Details

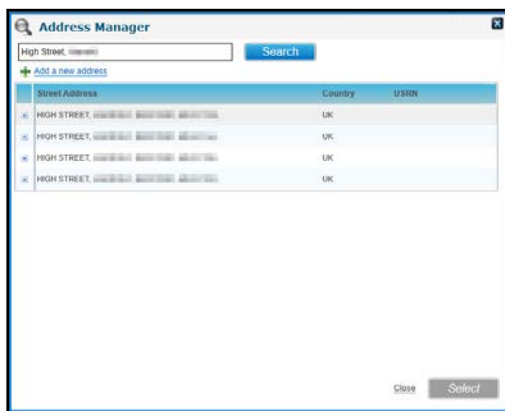
To remove cost centre details for an invoice account:

1. On the **Cost Centre Details** panel, click the **Remove** button to display a confirmation message.
2. Click the **Yes** button to remove the cost centre details.

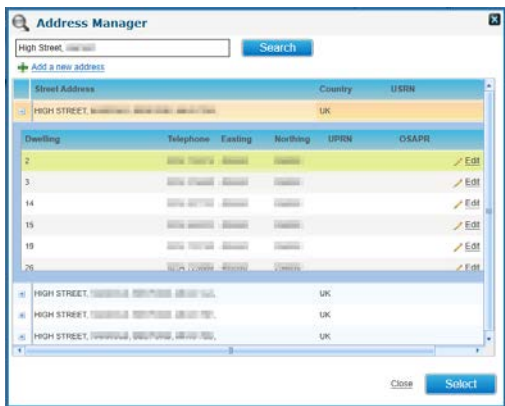
Selecting an Address



1. Enter a **Post code** or partial **Street Address** and click the **Search** button to display matching **Street Addresses**.



2. Click the expand button for the required **Street Address** to list the **Dwelling** details.



3. Select the required **Dwelling** address and click the **Select** button.

*NOTE: Users with appropriate permissions set up can click the **Add a new address button** to add a new address.*

Managing Discounts

Discounts can be applied in a variety of ways and there is a hierarchy of discounts, which are applied as follows:

1. A specific discount percentage for the invoice point. If this is present it takes precedent over any other discount types that apply.
2. The invoice point is associated with a discount schema, which applies a percentage discount.

Viewing a Discount

1. Select the required invoice account.

For more information, see [Selecting an Invoice Point](#) on page 39..

2. Select the **Discounts** tab to display a list of current discounts for this account.



3. If required, filter the list by selecting a **From Date**, entering a **Ledger Account** or selecting the **Expired Also** check box.

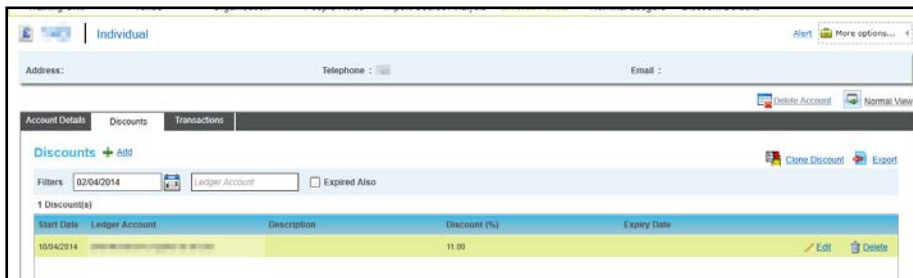
Cloning a Discount

A discount can be cloned and added to one or more invoice accounts.

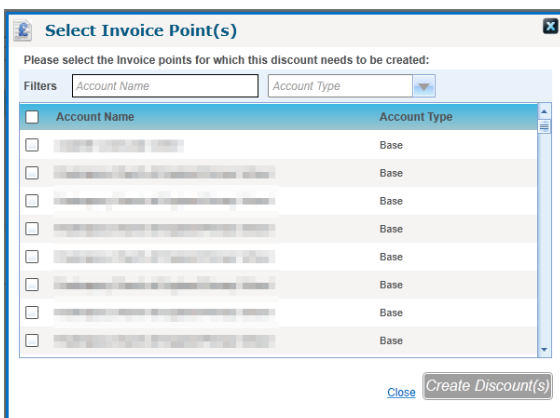
1. Select the **invoice point** from which you wish to clone a discount.

For more information, see [Selecting an Invoice Point](#) on page 39.

2. Select the **Discounts** tab to display a list of current discounts for this account.



3. Select the required discount in the list.
4. Click the **Clone Discount** button to display the **Select Invoice Point(s)** window.

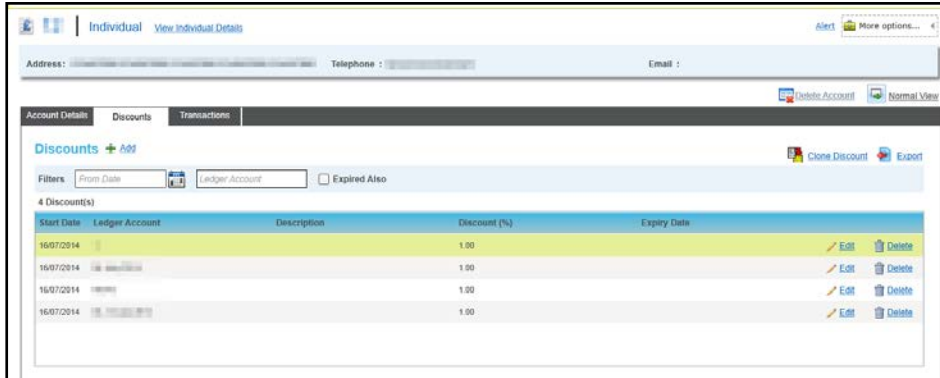


5. If required, enter an **Account Name** or select an **Account Type** to filter the list.
6. Select one or more accounts to which you wish to add this discount.
7. Click the **Create Discount(s)** button.

Exporting a Discount

A discount can be exported to a file.

1. Select the required **invoice account** from which you wish to export a discount.
For more information, see [Selecting an Invoice Point](#) on page 39.
2. Select the **Discounts** tab to display a list of current discounts for this account.



3. Select the required discount in the list.
4. Click the **Export** button to display a standard **Save As** dialog.
5. Select a location for the file.
6. Enter a **File Name** and **Save** as type.
7. Click the **Save** button.

Managing Transactions for an Invoice Account

To manage transactions, first select an invoice account and then select the **Transactions** tab.

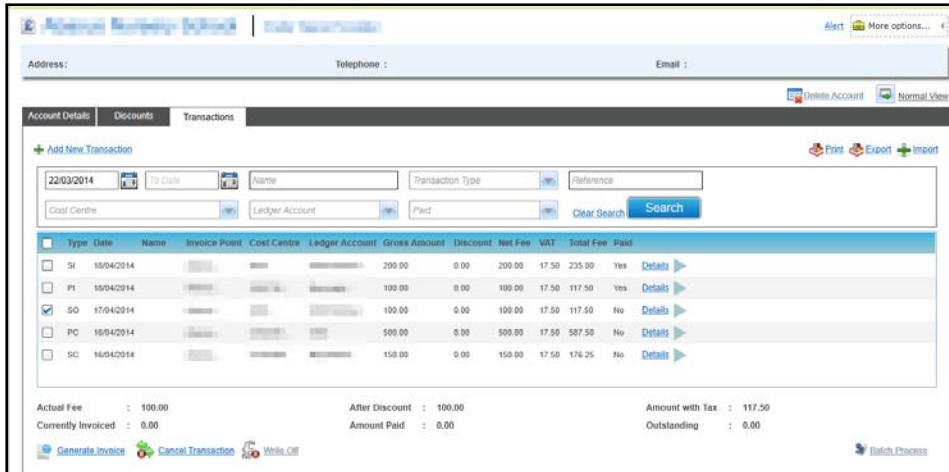
More Information:

[Selecting an Invoice Point](#) on page 39 and [Managing Transactions](#) on page 57.

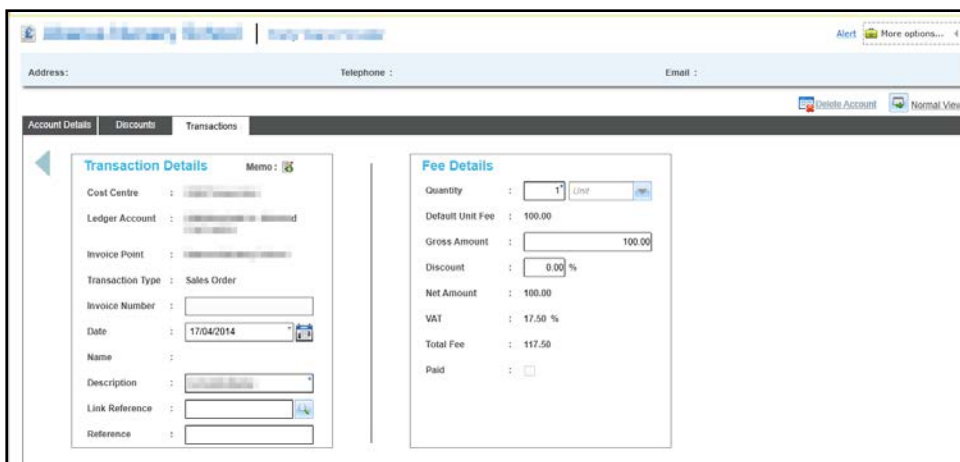
Viewing Transactions for an Invoice Point

A list of transactions can be viewed for a selected invoice point.

1. Select the required invoice account to display the **Account Details**.
For more information, see [Selecting an Invoice Point](#) on page 39.
2. Select the **Transactions** tab to display a list of current transactions for this account.
3. If required, enter search criteria to filter the list and click the **Search** button.
4. Select the required check box to display further details of the transaction beneath the panel.



5. Click the **Details** button to display the **Transaction Details** and **Fee Details**.



Setting Up and Maintaining Nominal Ledger Accounts

Nominal ledger accounts support the finance requirements for Music Tuition. Nominal ledger accounts also store budget information relating to the planned expenditure for training courses.

They are used to store the standard charges that may be applied to tuition, the hire and repair of instruments or ensemble membership. When a transaction is raised for a nominal ledger, a discount may be applied to the transaction depending on the discounts that have been associated with the invoice point.

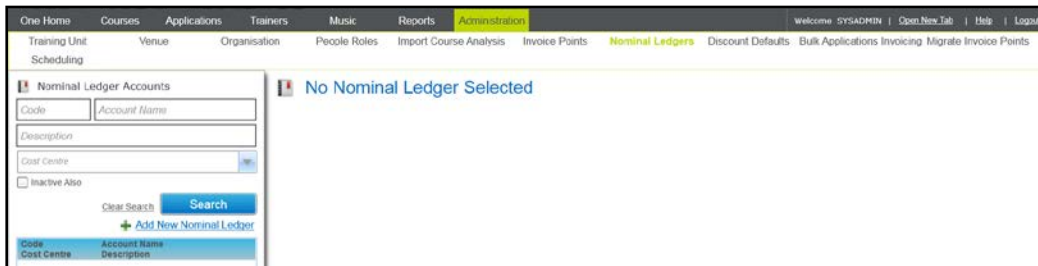
The Local Authority should consider carefully its requirements for setting up nominal ledger accounts. As a minimum, one nominal ledger account is required for each distinct standard charge that is applied for a transaction type. It is possible to set up a nominal ledger with a zero cost default fee.

For example, the Local Authority offers Brass tuition for a standard cost of £100, Woodwind tuition for a standard cost of £100 and Percussion tuition for a standard cost of £80 for a period. In order to maintain financial transactions within the One database, the Local Authority would need to set up at least one nominal ledger with a default fee of £100 (to cover the Brass and Woodwind tuition, alternatively the LA may wish to have two separate ledgers for these) and one with a default fee of £80 for the percussion.

An LA may wish to record a zero cost nominal ledger if the service it provides is free but it also wants to maintain records of any costs it incurs to provide that service, e.g. in room hire, catering, trainer fees etc.

Adding a Nominal Ledger Account

1. Select the **Administration** area.
2. Select the **Nominal Ledger** tab to display the nominal ledger account search.



3. Click the **Add New Nominal Ledger** button to display the **Add New Nominal Ledger** dialog.

4. Enter a numeric **Code**. This may be the code used in your third party finance system for this ledger account.
5. Enter an **Account Name**.
6. If required, enter a **Description** and **Default Fee**.
7. If required, enter a different **VAT** rate.
8. Select the required **Primary Cost Centre** radio button.

If you select the **Selected Cost Centres Only** radio button, you will be prompted to add the required cost centres. For information, see [Adding a Cost Centre to a Nominal Ledger Account](#) on page 47.

9. Click the **Save** button.

NOTE: If the Local Authority does not have a licence for Training Manager v4, only the Music Tuition cost centre is available.

Viewing a Nominal Ledger Account

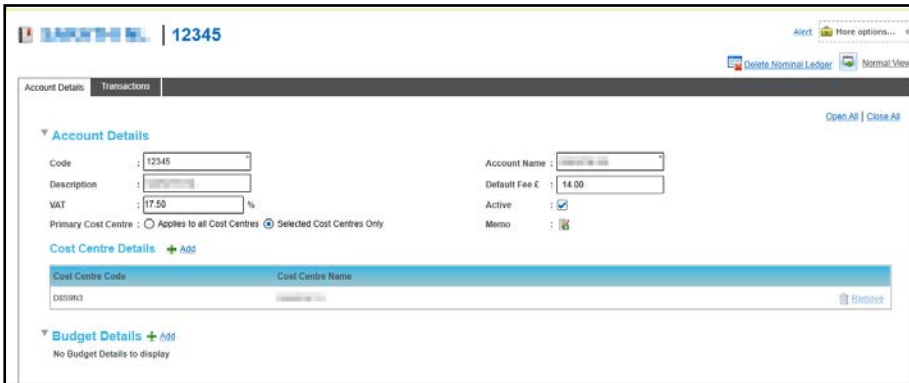
Search for and view the details of a nominal ledger account including budgets defined for the ledger account.

1. Select the **Administration** area.
2. Select the **Nominal Ledger** tab to display the **Nominal Ledger Accounts** search panel.



3. Enter your required search criteria.
4. Click the **Search** button to display a list of matching ledger accounts.

- Select an account to display the **Account Details**, **Cost Centre Details** and **Budget Details**.



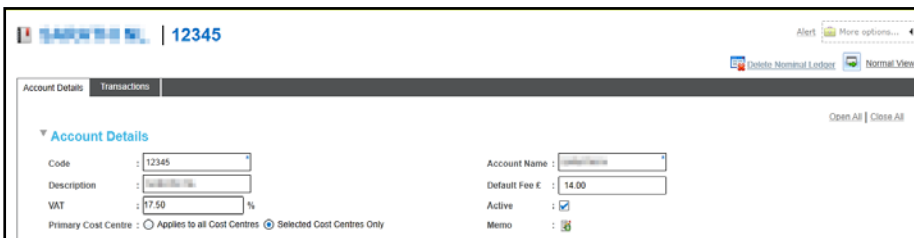
Updating a Nominal Ledger Account

The Nominal Ledger account details, cost centre details and budget details can be updated.

Updating Account Details

- Select the required account details.

For more information, see [Viewing a Nominal Ledger Account](#) on page 46.



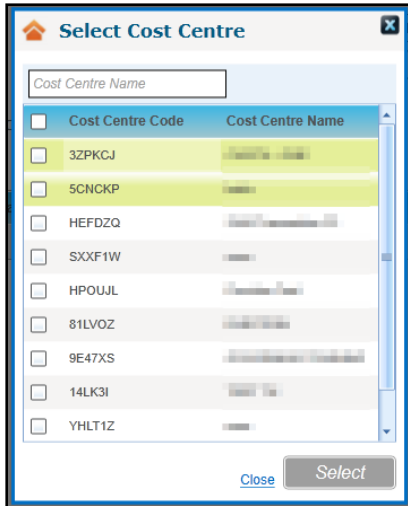
- Edit the account details as described in [Adding a Nominal Ledger Account](#) on page 46.
- Click the **Save** button.

Adding a Cost Centre to a Nominal Ledger Account

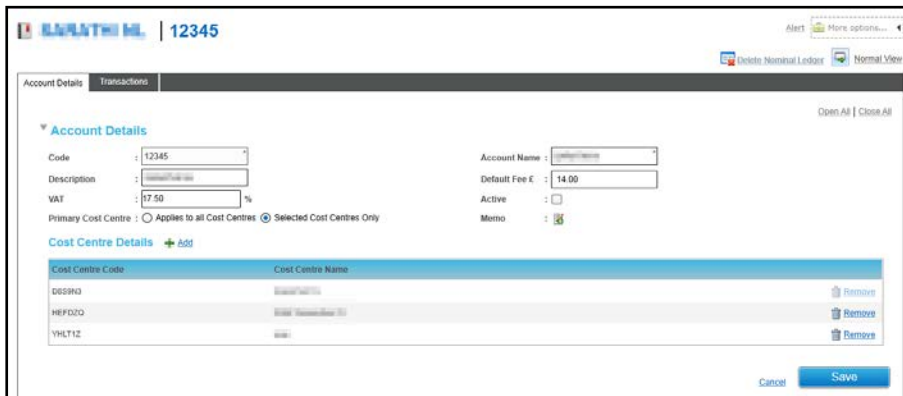
Existing cost centres for this Nominal Ledger account are displayed on the **Cost Centre Details** panel. New cost centres can be added.

NOTE: If the Local Authority does not have a licence for Training Manager v4, only the Music Tuition cost centre is available.

- Select the required account to view its details.
For more information, see [Viewing a Nominal Ledger Account](#) on page 46.
- Click the **Add** button to display the **Select Cost Centre** window with a list of all available cost centres.



3. If required, enter a full or partial **Cost Centre Name** to filter the list.
4. Select the check box for one or more cost centres.
5. Click the **Select** button to display the selected cost centres on the **Account Details** page.



6. Click the **Save** button.

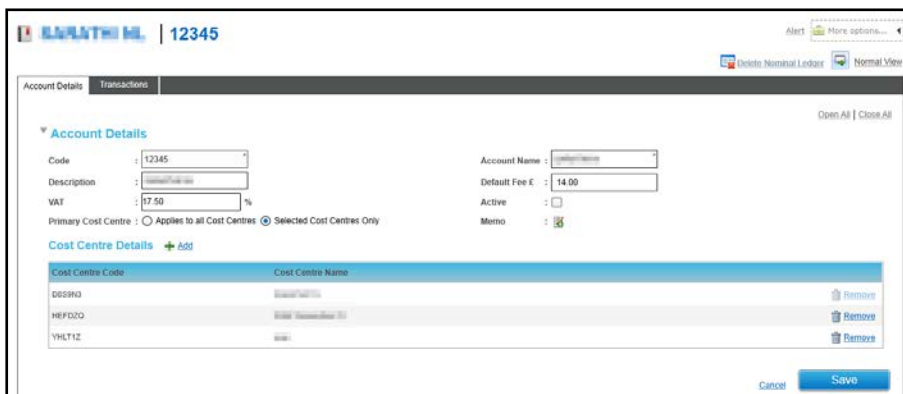
Removing a Cost Centre from a Nominal Ledger Account

A cost centre can be removed if there are no associated transactions.

NOTE: If the Local Authority does not have a licence for Training Manager v4, only the Music Tuition cost centre is available and must not be removed.

1. Select the required account to view its details.

For more information, see [Viewing a Nominal Ledger Account](#) on page 46.



2. Click the **Remove** button on the **Cost Centre Details** panel to display a confirmation message.
3. Click the **Yes** button to confirm the removal of the cost centre.
4. Click the **Save** button.

Adding a Budget to a Nominal Ledger Account

Budget information is divided into months.

NOTE: The budget is for information only and is not taken into account when maintaining transactions.

1. Select the required account to view its details.
For more information, see [Viewing a Nominal Ledger Account](#) on page 46.
2. On the **Budget Details** panel, click the **Add** button to display the **Month** and **Budget** input fields.

The screenshot shows a 'Budget Details' panel with a dropdown menu for 'Month' and a text input field for 'Budget'. There are 'Cancel' and 'Save' buttons at the bottom right.

3. Select a **Month** from the calendar.
4. Enter a **Budget**.
5. Click the **Save** button.

Bulk Updating VAT for Nominal Ledgers

The Update VAT routine enables you to update VAT rates in bulk for all Nominal Ledger accounts with the same existing rate.

1. Select the required account to view its details..
For more information, see [Viewing a Nominal Ledger Account](#) on page 46.

The screenshot shows the 'Account Details' panel for account 12345. The VAT rate is set to 17.50%. A 'More options' menu is open on the right, with 'Update VAT' selected.

2. From the **More options** menu, select the **Update VAT** link to display the **Nominal Ledger Bulk Update VAT** dialog.

The screenshot shows the 'Nominal Ledger Bulk Update VAT' dialog box. It contains two input fields: 'Existing VAT' and 'Revised VAT'. There are 'Close' and 'Process' buttons at the bottom.

3. Enter the **Existing VAT** rate.
4. Enter the **Revised VAT** rate.
5. Click the **Process** button.

NOTE: This will not affect any existing transactions already associated with the nominal ledgers.

Managing Transactions for a Nominal Ledger Account

To manage transactions, first view the Nominal Ledger account and then select the **Transactions** tab.

More Information:

[Viewing a Nominal Ledger Account](#) on page 46.

[Managing Transactions](#) on page 57.

Deleting a Nominal Ledger Account

A Nominal Ledger account cannot be deleted if there are any transactions recorded for it.

1. Select the required account to view its details.

For more information, see [Viewing a Nominal Ledger Account](#) on page 46.

2. Click the **Delete Nominal Ledger** button to display a confirmation message.
3. Click the **Yes** button delete the nominal ledger account.

Maintaining Discount Defaults

Default discount values can be assigned to a set of schemas and base types. You can associate invoice points to schemas via **Administration | Invoice Points** and any transactions created under that invoice point will have the discount defined in the schema applied. Similarly, when the school is created as an invoice point, it will inherit all discounts defined for the base type of the school.

NOTE: Base types are defined in **v4 Client | Tools | Administration | Lookups** via **Base Types Lookup** Table ID: 0070.

There is a hierarchy of discounts as follows:

1. A specific discount percentage can be applied to a specific invoice point. If this is present then this takes precedent over any other discount types that apply to the invoice point.
2. The invoice point is associated with a discount schema, which applies a percentage discount.
3. The invoice point is a Base and there is a discount percentage associated with the base type. This only applies if there are no other types of discounts for this invoice point.

Viewing Discount Defaults

NOTE: A maximum of 10 discount schemas can be recorded and applied to invoice points at any given time. You can add multiple invoice points to a schema via the **Invoice Points** tab.

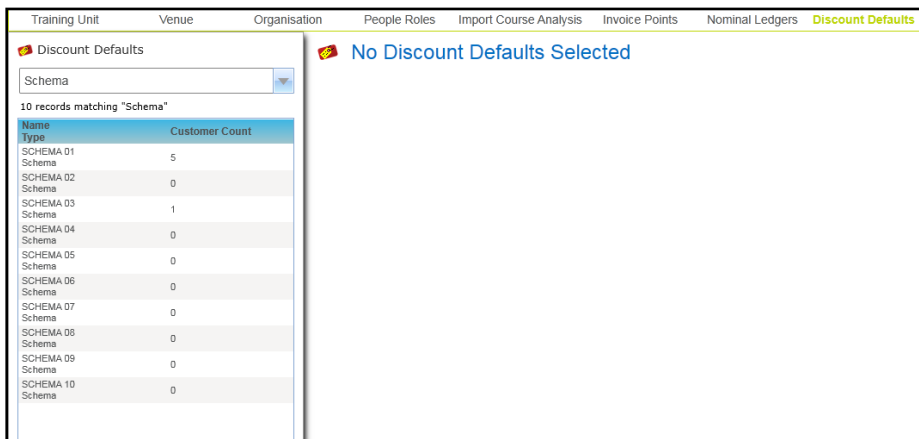
It is not possible to add any further schemas.

1. Select the **Administration** area.
2. Select the **Discount Defaults** tab to display a list of existing defaults.

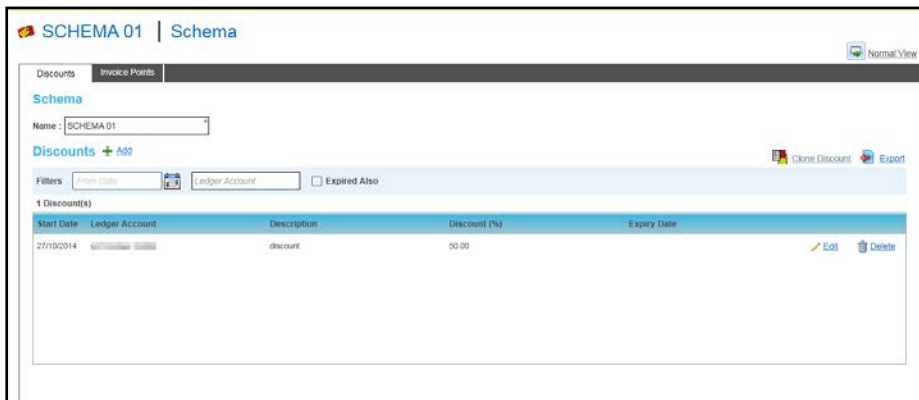


NOTE: Each base type is listed as well as ten schemas, with a default name of SCHEMA 01 - SCHEMA 10. These schema names can be edited to make them more meaningful e.g. 25% discount, or Gold service - 25%.

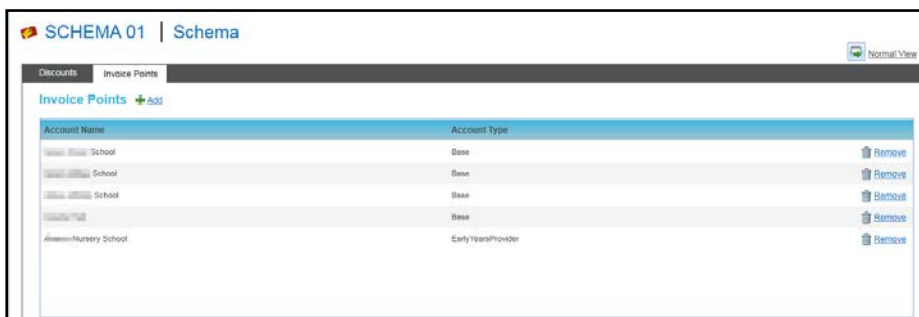
To filter the list, select a **Defaults Type** of either **Base Type** or **Schema** from the drop-down.



3. Select a default in the list to display the details.



4. If the **Defaults Type** is **Schema**, you can select the **Invoice Points** tab to display associated **Invoice Points**.

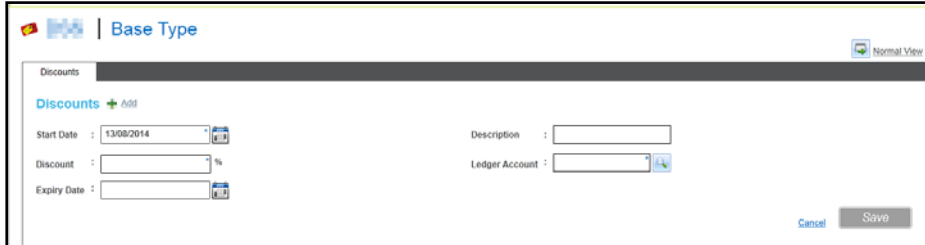


For more information about adding invoice points to a schema, see [Maintaining Invoice Accounts](#) on page 37.

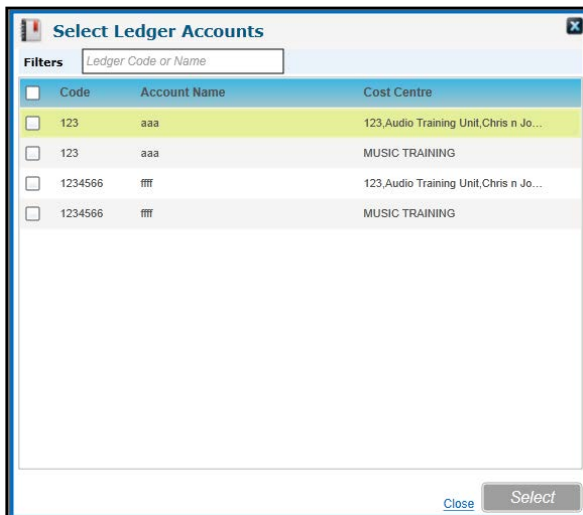
Adding a Discount

After selecting the required discount default, a new discount can be added.

1. Select the **Discounts** tab.
2. Click the **Add** button.



3. If required, select a different **Start Date** and enter a **Description**.
4. Enter a **Discount** percentage.
5. Click the **Ledger Account** browse button to display the **Select Ledger Accounts** dialog.



Code	Account Name	Cost Centre	
<input type="checkbox"/>	123	aaa	123,Audio Training Unit,Chris n Jo...
<input type="checkbox"/>	123	aaa	MUSIC TRAINING
<input type="checkbox"/>	1234566	fff	123,Audio Training Unit,Chris n Jo...
<input type="checkbox"/>	1234566	fff	MUSIC TRAINING

6. Select one or more ledger accounts and click the **Select** button.
7. If required, select an **Expiry Date**.
8. Click the **Save** button.

Migrating Invoice Points

After migration from v3, invoice points can be created for bases, organisations and people that have been migrated. These invoice points are then available to be selected for an application. Existing applications are automatically mapped to the invoice point.

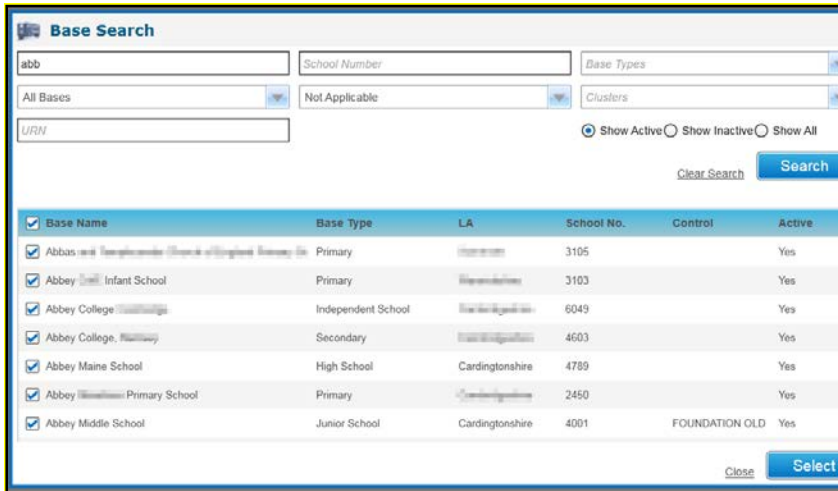
For more information about creating invoice points, refer to [Maintaining Invoice Accounts](#) on page 37.

Migrating an Invoice Point for a Base

1. Select the **Administration** area.
2. Select the **Migrate Invoice Points** tab to display the **Migrate Invoice Points** page.



3. Select **Base** from the **Account Type** drop-down.
4. Click the **Account Point** browse button to display the **Base Search** dialog.
5. Enter search criteria and click the **Search** button to display a list of bases without invoice points.



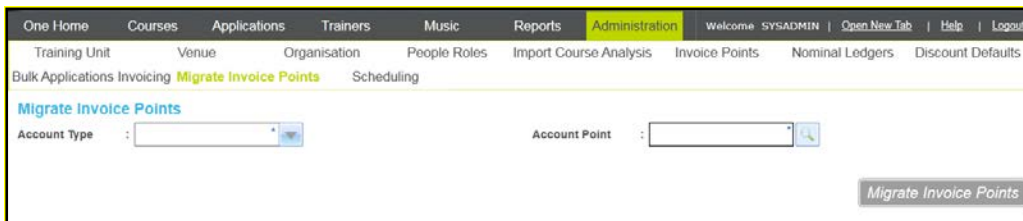
6. Select the bases for which you want to create invoice points and click the **Select** button.



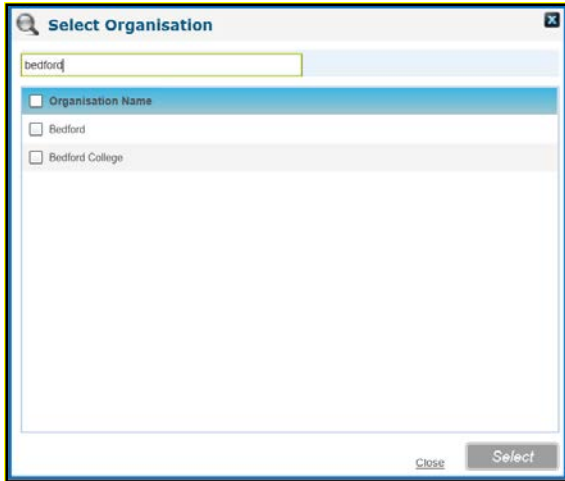
7. Click the **Migrate Invoice Points** button to create invoice points for the selected bases and link existing applications to the invoice points.

Migrating an Invoice Point for an Organisation

1. Select the **Administration** area.
2. Select the **Migrate Invoice Points** tab to display the **Migrate Invoice Points** page.



3. Select **Organisation** from the **Account Type** drop-down.
4. Click the **Account Point** browse to display the **Select Organisation** dialog.
5. Enter a partial **Organisation Name** to filter the list of organisations that do not have invoice points.



6. Select the organisations for which you want to create invoice points and click the **Select** button.



7. Click the **Migrate Invoice Points** button to create invoice points for the selected organisations and link any existing applications to the invoice points.

Migrating an Invoice Point for a Person

1. Select the **Administration** area.
2. Select the **Migrate Invoice Points** tab to display the **Migrate Invoice Points** page.
3. Select **Person** from the **Account Type** drop-down.
4. Click the **Account Point** browse button to display the **Person Search** dialog and select a person.

For more information, see [Selecting a Person using Person Search](#) on page 32.

5. Select the people for whom you want to create invoice points and click the **Select** button.



6. Click the **Migrate Invoice Points** button to create invoice points for the selected people and link any existing applications to the invoice points.

Scheduling Email Options

This page enables the Local Authority to choose the types of email addresses that are used to notify applicants about course information. Emails can be sent to one or more of the following:

- The email address held for an applicant in their person record.
- The **To** email address held on the **Application Details** screen.
- The **CC** email address held on the **Application Details** screen.

For information about updating application details, see [Editing an Application](#) on page 111.

For information about sending emails via the scheduler, see [Using the Scheduler to Send an Email](#) on page 8.

1. Select the **Administration** area.
2. Select the **Scheduling** tab to display the **Scheduling Email Options** page.

3. Select one or more check boxes as follows:
 - To send emails to the address held for an applicant in their person record, select the **Person Email Address** check box.
 - To send emails to the To email address held on the application details page, select the **Applicant's To Email Address** check box.
 - To send emails to the CC address held on the application details screen, select the **Applicant's CC Email Address** check box.
4. Click the **Schedule** button.

Generating Course Application Invoices in Bulk

This area enables you to generate invoices in bulk for multiple courses and invoice points, when sales order transactions are linked to the course applications.

NOTE: In order to run this routine you must be in a user group that has been assigned write permission for the business process **Generate Course Applications in Bulk** under the main business process of **Finance**.
For more information, see [Setting up Permissions](#) on page 15.

Setting Up and Administering Music Tuition

One Home Courses Applications Trainers Music Reports Administration Welcome SYDADMIN | Open New Tab | Help | Logout

Training Unit Venue Organisation People Roles Import Course Analysis Invoice Points Nominal Ledgers Discount Defaults **Bulk Applications Invoicing**

Generate Course Application Invoices in Bulk

This area enables the Local Authority to select multiple Courses and Invoice Points. Courses will only be displayed if there are Sales Order transactions linked with course applications. Upon processing, any existing Sales Order transactions associated with applications for the selected Courses and Invoice Points will be converted to Sales Invoices. Any linked applications' status will be updated to 'Invoiced'. Applications associated with the same Invoice Point will share the same Invoice Number.

LA: Course Name:

Course Code: ID: From Date: (dd/mm/yyyy) To Date: (dd/mm/yyyy)

Include Completed Courses

[More Options](#)

Clear Search

Selected Course(s)

Course Name	Start Date	End Date	Status

1. Select the **Administration** area.
2. Select the **Bulk Applications Invoicing** tab.
3. Select a **Training Unit** from the drop-down list.
4. If required, enter a **Course Name**, **Course Code**, **From Date** and **To Date**.

To include courses that have already finished, select the **Include Completed Courses** check box.

You can click the **More Options** link to display the **More Search Options** dialog and search on other criteria.

5. Click the **Search** button to display matching courses in the left-hand panel.

css retest 12 2 15

Course Code: ID: From Date: (dd/mm/yyyy) To Date: (dd/mm/yyyy)

Include Completed Courses

[More Options](#)

1 Course(s) matching "css retest 12 2 15, c1"

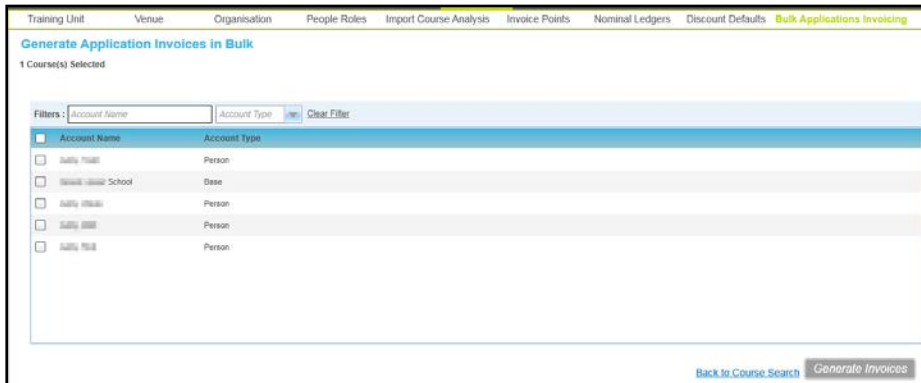
Course Name	Start Date	End Date	Status
<input type="checkbox"/> c1-111 c1	13/02/2015	13/03/2015	In Progress

Clear Search

Selected Course(s)

Course Name

6. Select the required courses in the list and click the **Select** button to display the course in the **Selected Course(s)** list.
7. Click the **Next** button to display the **Generate Application Invoices in Bulk** screen.



8. If required, filter the list of accounts using **Account Name** and **Account Type**.
9. Select one or more accounts and click the **Generate Invoices** button.

Upon processing, any sales order transactions associated with applications for the selected courses and invoice points are updated to sales invoices.

The following message is displayed:

Do you want to update Applications as Invoiced?

To update the status of any linked applications to Invoiced, click the **Yes** button.

NOTE: Applications associated with the same invoice point have the same invoice number.

Managing Transactions

Transactions are associated with a cost centre (for Music Tuition, this is the Music Training Unit), a nominal ledger and an invoice point. Transactions can be accessed from any of those entities. For transactions relating to tuition, instrument hire or repair or ensemble membership, the transaction is usually added from the relevant course, instrument or ensemble, via the **More Options | Billing** area, if it is linked to a nominal ledger account. You can record transactions that represent fees for services provided and the costs that the LA has incurred (e.g. for venue hire, catering or trainer costs).

Transactions can be viewed, new transactions added and invoices generated. You can cancel unpaid sales or purchase orders and write off unpaid invoices. Batch processing of transactions is available.

A list of transactions is displayed when you select the **Transactions** tab while viewing a cost centre, invoice point or nominal ledger account.

When you click the **Billing** link while viewing a course with an associated nominal ledger account, a list of transactions linked to that specific course and its applications is displayed.

More information:

[Managing Transactions for an Invoice Account](#) on page 44.

[Managing Transactions for a Nominal Ledger Account](#) on page 50.

[Managing Course Billing](#) on page 101.

Adding a New Transaction

NOTE: Transactions are *usually* added from the **Course, Instrument or Ensembles** area via **More Options | Billing** rather than via the **Administration** area.

1. Open the account to which you wish to add a transaction and select the **Transactions** tab.
2. For more information, see [Viewing Transactions](#) on page 59.

Type	Date	Name	Invoice Point	Cost Centre	Ledger Account	Gross Amount	Discount	Net Fee	VAT	Total Fee	Paid
PO	15/04/2014					100.00	10.00	90.00	17.50	105.75	No
SX	15/04/2014					0.00	10.00	0.00	17.50	0.00	Yes
SC	15/04/2014					100.00	10.00	90.00	17.50	105.75	No
WO	15/04/2014					0.00	0.00	0.00	17.50	0.00	No

3. Click the **Add New Transaction** button to display the **Transaction Details** and **Fee Details** panels.

4. Enter **Transaction Details** as follows:

NOTE: The **Cost Centre**, **Ledger Account** and **Invoice Point** are either entered or automatically completed, depending on the type of account and the entry point for recording the transaction.

5. If required, select a **Cost Centre** from the drop-down list.

NOTE: The **Cost Centre** is automatically completed for course billing transactions.

6. If required, add a **Ledger Account**.
7. Click the **Ledger Account** browse button to display the **Select Ledger Accounts** dialog.

Code	Account Name	Cost Centre
11	1	MUSIC TRAINING
213		MUSIC TRAINING
14072014		MUSIC TRAINING
15072014		MUSIC TRAINING
99999999		MUSIC TRAINING

8. Select the required account from the list of ledger accounts for the cost centre.
9. Click the **Select** button.
10. If required, click the **Invoice Point** browse button to select an invoice point.
11. Select the **Transaction Type** from the drop-down list.
12. If required, select a **Date, Type** and **Name**.

NOTE: If a transaction is added for a course, selecting a **Type of Applicant** enables you to select an applicant on that course.

For more information, see [Selecting a Person using Person Search](#) on page 32.

13. Enter a **Description**.
14. If required, click the **Link Reference** browse button to display the **Select Ledger Accounts** dialog and select a further account to be linked to this transaction. For example, to group nominal ledger accounts together, you can specify an overall account.
15. If required, enter a **Reference**.
16. Enter **Fee Details** as follows:
17. Enter a **Quantity**.
18. If required, select a **Unit**.
19. **Gross Amount** is automatically calculated using **Quantity** and **Default Unit Fee**.
20. If required, enter a **Discount** percentage.

NOTE: If discounts are associated with the invoice point, the discount with precedence is automatically applied to the transaction. For more information, see [Maintaining Discount Defaults](#) on page 50.

21. If required, select a **Payment Type** (Lookup Table ID: 0567).
22. Click the **Save** button.

Viewing Transactions

1. Open the account for which you wish to view transactions and select the **Transactions** tab.
2. If required, enter search criteria and click the **Search** button.
3. Select the check box for a single transaction to view further details beneath the panel.

Type	Date	Name	Invoice Point	Cost Centre	Ledger Account	Gross Amount	Discount	Net Fee	VAT	Total Fee	Paid
<input type="checkbox"/>	SI	18/04/2014				200.00	0.00	200.00	17.50	217.50	Yes
<input type="checkbox"/>	PI	18/04/2014				100.00	0.00	100.00	17.50	117.50	Yes
<input checked="" type="checkbox"/>	SO	17/04/2014				100.00	0.00	100.00	17.50	117.50	No
<input type="checkbox"/>	PC	16/04/2014				500.00	0.00	500.00	17.50	517.50	No
<input type="checkbox"/>	SC	16/04/2014				150.00	0.00	150.00	17.50	167.50	No

Actual Fee : 100.00 After Discount : 100.00 Amount with Tax : 117.50
 Currently Invoiced : 0.00 Amount Paid : 0.00 Outstanding : 0.00

4. Click the **Details** button to display the **Transaction Details** and **Fee Details** panels.

Setting Up and Administering Music Tuition

Transaction Details Memo:

Cost Centre : MUSIC TRAINING

Ledger Account : test NL

Invoice Point :

Transaction Type : Sales Order

Invoice Number :

Date : 29/08/2014

Name :

Description :

Link Reference :

Reference :

Fee Details

Quantity : 1

Default Unit Fee : 100.00

Gross Amount : 200.00

Discount : 0.00 %

Net Amount : 200.00

VAT : 20.00 %

Total Fee : 240.00

Payment Type : Credit

Paid :

Generating an Invoice

An invoice can be generated for a sales order transaction. Generating the invoice updates the transaction type and generates an invoice number.

1. Open the account for which you wish generate an invoice and select the **Transactions** tab. For more information, see [Viewing Transactions](#) on page 59.
2. Select the check box for one or more sales order (**SO**) transactions with a **Paid** status of **No**.

3 Transactions(s) matching "MUSIC TRAINING"

Type	Date	Name	Invoice Point	Cost Centre	Ledger Account	Gross Amount	Discount	Net Fee	VAT	Total Fee	Paid
<input checked="" type="checkbox"/>	03/09/2014	Governors...		Devs test NL	100.00	50.00	50.00	20.00	60.00	No	Details
<input checked="" type="checkbox"/>	29/08/2014	MUSIC...		Devs test NL	0.00	0.00	0.00	20.00	0.00	Yes	Details
<input type="checkbox"/>	29/08/2014	MUSIC...		Devs test NL	200.00	0.00	200.00	20.00	240.00	No	Details

Actual Fee : 100.00 After Discount : 50.00 Amount with Tax : 60.00
 Currently Invoiced : 0.00 Amount Paid : 0.00 Outstanding : 0.00

[Generate Invoice](#) [Cancel Transaction](#) [Write Off](#) [Batch Process](#)

3. Click the **Generate Invoice** button to update the transaction type to sales invoice (**SI**) and generate an invoice number for each transaction.

3 Transactions(s) matching "Devs test NL"

Type	Date	Name	Invoice Point	Cost Centre	Ledger Account	Gross Amount	Discount	Net Fee	VAT	Total Fee	Paid
<input type="checkbox"/>	03/09/2014	Governors...		Devs test NL	100.00	50.00	50.00	20.00	60.00	No	Details
<input checked="" type="checkbox"/>	29/08/2014	MUSIC...		Devs test NL	0.00	0.00	0.00	20.00	0.00	Yes	Details
<input type="checkbox"/>	29/08/2014	MUSIC...		Devs test NL	200.00	0.00	200.00	20.00	240.00	No	Details

[Generate Invoice](#) [Cancel Transaction](#) [Write Off](#) [Batch Process](#)

The **Transaction Details** are updated as shown in the following graphic:

Transaction Details		Memo :	
Cost Centre :	<input type="text"/>		
Ledger Account :	Nominal Ledger		
Invoice Point :	<input type="text"/>		
Transaction Type :	Sales Invoice		
Invoice Number :	<input type="text" value="TRIG0000001"/>		
Date :	<input type="text" value="27/10/2014"/>		
Name :	<input type="text"/>		
Description :	Accommodation		
Link Reference :	<input type="text"/>		
Reference :	<input type="text"/>		

Fee Details		View Invoice Report	
Quantity :	<input type="text" value="1"/> Unit		
Default Unit Fee :	175.00		
Gross Amount :	<input type="text" value="175.00"/>		
Discount :	<input type="text" value="0.00"/> %		
Net Amount :	175.00		
VAT :	17.50 %		
Total Fee :	205.62		
Payment Type :	Debit		
Paid :	<input type="checkbox"/>		

NOTE: The **Invoice Number** is the Invoice Prefix for the training unit followed by a 7-digit incremental number.
 The **Invoice Prefix** is added via **Administration | Training Unit | Basic Details**. For more information, see [Setting Up and Maintaining Training Units](#) on page 16.

Generating an Invoice Report

If an Invoice Report is set up for the training unit then, as part of the Generate Invoices process, you can generate and print the report.

A template Invoice Report must be linked to the **Training Unit | Basic Details - Invoice Report**. A sample report is provided as one of the template standard reports.

NOTE: The invoice report must be a Crystal report which has a parameter set up to accept a value to `IP_TRANSACTION.PRINT_ID`. This is designed so that all selected invoices will be printed on one report.

1. Select one or more Sales Invoice transactions.

Type	Date	Name	Invoice Point	Cost Centre	Ledger Account	Gross Amount	Discount	Net Fee	VAT	Total Fee	Paid
SO	27/10/2014					451175.00	0.00	451175.00	17.50	530130.62	No
<input checked="" type="checkbox"/>	SI	27/10/2014				175.00	0.00	175.00	17.50	205.62	No
<input checked="" type="checkbox"/>	SI	27/10/2014				175.00	0.00	175.00	17.50	205.62	No
<input checked="" type="checkbox"/>	SI	27/10/2014				175.00	0.00	175.00	17.50	205.62	No
<input checked="" type="checkbox"/>	SI	27/10/2014				175.00	0.00	175.00	17.50	205.62	No
<input checked="" type="checkbox"/>	SI	27/10/2014				175.00	0.00	175.00	17.50	205.62	No

Actual Fee : 525.00 After Discount : 525.00 Amount with Tax : 616.86
 Currently Invoiced : 616.86 Amount Paid : 0.00 Outstanding : 616.86

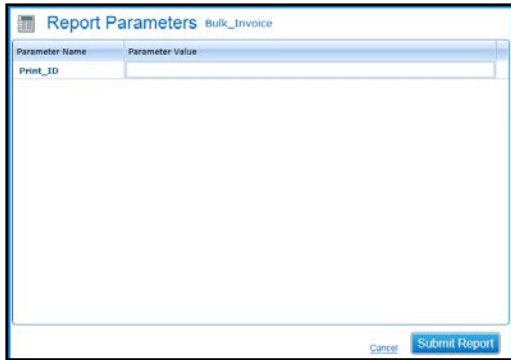
2. Click the **Print** button to display the **Select a Transaction Report** dialog.

Code	Description
45	Ethnic Ensemble
46	All Ensemble
47	Instruments and Lessons KS
39	Boys Tuition by KS 2nd
52	Bulk_Invoice
38	Invoices by Bases template

Cancel Select

3. Select the required report and click the **Select** button to display the **Report Parameters** dialog.

Setting Up and Administering Music Tuition

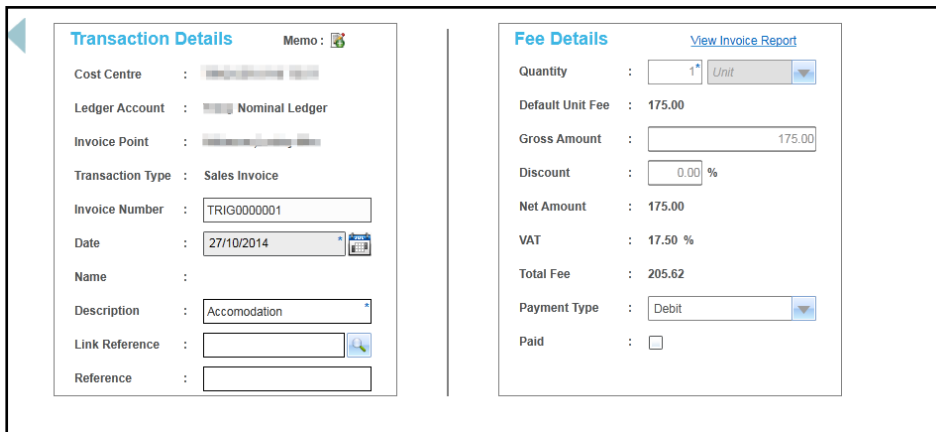


The **Parameter Value** will be automatically completed.

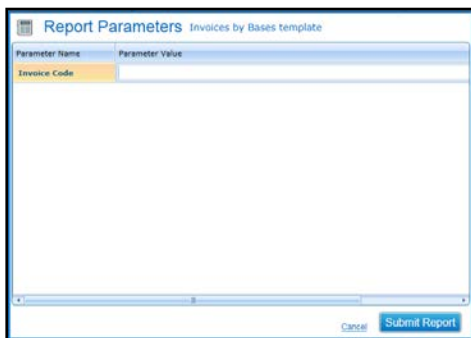
4. Click the **Submit Report** button.

Regenerating an Invoice Report.

Once an Invoice report has been generated, it can be regenerated for the selected group of records by selecting one of the transactions and clicking the **View Invoice Report** button.



1. On the **Fee Details** panel, click the **View Invoice Report** button to display the **Report Parameters** dialog.



The parameter value is automatically completed.

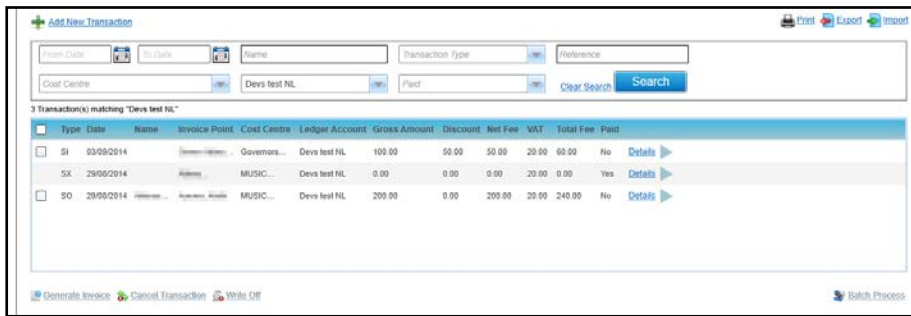
2. Click the **Submit Report** button.

Editing a Transaction

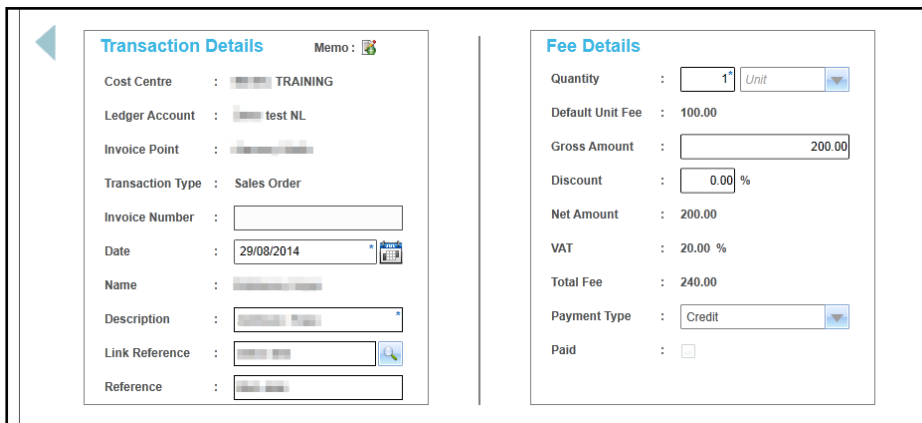
Transactions that have not been paid or cancelled can be edited. The details that are editable depend on the transaction type. Transactions with a type of SX, PX, WO, SI (Paid) or PI (Paid) cannot be edited.

1. Open the account for which you wish to edit a transaction and select the **Transactions** tab.

For more information, see [Viewing Transactions](#) on page 59.



- Click the **Details** button to display the **Transaction Details** and **Fee Details**.



- Update the editable fields as described in [Adding a New Transaction](#) on page 58

The following **Transaction Details** can be updated:

- **Date** (Sales Order or Purchase Order).
- **Description**.
- **Link Reference**.
- **Reference**.

The following **Fee Details** can be updated:

- **Quantity**, **Gross Amount** or **Discount** (Sales Order or Purchase Order).
- **Payment Type**.

- Click the **Save** button.

Cancelling a Transaction

A Sales Order (SO) or Purchase Order (PO) that has not been paid can be cancelled. This updates the transaction type to Cancelled Sales Order (SX) or Cancelled Purchase Order (PX).

- Open the account containing the transaction you wish to cancel and select the **Transactions** tab.

For more information, see [Viewing Transactions](#) on page 59.

Setting Up and Administering Music Tuition

4 Transaction(s) matching "22/03/2014, Sales Order Transactions Map"

Type	Date	Name	Invoice Point	Cost Centre	Ledger Account	Gross Amount	Discount	Net Fee	VAT	Total Fee	Paid	Details
<input type="checkbox"/>	PO	15/04/2014				100.00	10.00	90.00	17.50	105.75	No	Details
<input type="checkbox"/>	SX	15/04/2014				0.00	10.00	0.00	17.50	0.00	Yes	Details
<input type="checkbox"/>	SC	15/04/2014				100.00	10.00	90.00	17.50	105.75	No	Details
<input type="checkbox"/>	WO	15/04/2014				0.00	0.00	0.00	17.50	0.00	No	Details

2. Select the check box for the Sales Order or Purchase Order you wish to cancel. The order must have a **Paid** status of **No**.
3. Click the **Cancel Transaction** button to display a confirmation message.
4. Click the **Yes** button cancel the transaction.

The **Transaction History** is updated as shown in the following graphic:

Transaction History

Date	Type	Description	Reference	Link Reference Name	Total Fee
30/07/2014	Sales Order	Sales Order 1			1.18

NOTE: When a Sales Order or Purchase Order is cancelled, the **Type** is updated to **Cancelled Sales Order** or **Cancelled Purchase Order**, the **Paid** status is updated to **Yes** and the **Fee Details** are updated to 0.

Writing Off a Transaction

A Sales Invoice (SI) or Purchase Invoice (PI) that has not been paid can be written off.

1. Open the account containing the transaction you wish to write off and select the **Transactions** tab.
For more information, see [Viewing Transactions](#) on page 59.
2. Select the check box for the Sales Order or Purchase Order you wish to write off. The order must have a **Paid** status of **No**.

1 Transaction(s) matching "29/06/2014, 111, No fee"

Type	Date	Name	Invoice Point	Cost Centre	Ledger Account	Gross Amount	Discount	Net Fee	VAT	Total Fee	Paid	Details
<input checked="" type="checkbox"/>	SI	30/07/2014				1.00	0.00	1.00	17.50	1.18	No	Details

Actual Fee : 1.00 After Discount : 1.00 Amount with Tax : 1.18
 Currently Invoiced : 1.18 Amount Paid : 0.00 Outstanding : 1.18

3. Click the **Write Off** button to display a confirmation message.
4. Click the **Yes** button to write off the transaction.

NOTE: When a transaction is written off the **Transaction Type** is updated to **Write Off (WO)** and the **Fee Details** are updated to 0. The **Transaction History** is also updated.

Batch Processing Transactions

Two or more transactions of the same type that are unpaid can be updated using a batch process.

1. Open the account containing the transactions you wish to batch process and select the **Transactions** tab.

For more information, see [Viewing Transactions](#) on page 59.

2. If required, enter search criteria and click the **Search** button to display a list of matching transactions.

Type	Date	Name	Invoice Point	Cost Centre	Ledger Account	Gross Amount	Discount	Net Fee	VAT	Total Fee	Paid	
<input checked="" type="checkbox"/>	24/07/2014	Music			18 July 2014	100.00	0.00	100.00	17.50	117.50	No	Details
<input checked="" type="checkbox"/>	24/07/2014	Music			HDPC	600.00	0.00	600.00	17.50	617.50	No	Details

Actual Fee : 790.00 After Discount : 790.00 Amount with Tax : 928.25
 Currently Invoiced : 0.00 Amount Paid : 0.00 Outstanding : 0.00

Buttons: Generate Invoice, Cancel Transaction, Write Off, Batch Process

3. Select the check box for the transactions you want to batch process. The orders must have a **Paid** status of **No**.
4. Click the **Batch Process** button to display the **Batch Processing** dialog.

Batch Processing
 Batch Processing (2 Transactions Selected)

Description :

Date :

Invoice Number / Credit Note Number:

Payment Type :

Paid :

Quantity :

Unit :

Gross Amount :

Discount : %

Buttons: Cancel, Process

5. Enter the required information and click the **Process** button to update all of the selected transactions and display a confirmation message.
6. Click the **Yes** button to update the orders.

03 / Managing Courses

Introduction to Managing Courses and Templates

The **Courses** area enables you to manage courses and course templates. Course templates can be set up for a range of standard courses before beginning to use the module. In order to create course templates, you first create a course and then save it as a template.

Courses can be based on course templates or cloned from other courses. For courses with sessions that are held on the course start or course end date only, it is recommended that the courses are cloned from other courses, rather than created from templates, since this enables the cloning of session details.

Music tuition should be managed using courses and sessions. It is possible to set up courses for a long period and to run recurring sessions within that course. For example, you may wish to set up a course for Clarinet tuition for the whole of an academic year with recurring sessions which may be at one or more venues. Students can be booked onto particular sessions or all sessions.

The **Calendar View** tab provides a view of the planned courses and sessions for the selected month, week or day. The calendar can help you with monitoring resource usage by viewing details of a venue and room bookings or a trainer's allocations for a period.

Managing Courses and Applicants

The **Courses | All Courses** page enables you to view and update course details and manage course applications. It provides a course search.

More Information:

[Managing Course Templates](#) on page 91.

[Managing Courses using the Calendar View](#) on page 97.

Adding a New Course

NOTE: Courses in v 4 are not restricted by financial year settings. Therefore, course codes need to be unique across all courses and different from any existing v3 course codes (if migrating from v3 to v4). The system automatically checks for duplicate course codes when a new course is set-up.

It is recommended to plan appropriate naming conventions for courses (course codes in particular) to identify years if required.

Course codes can be up to 15 characters.

To add a new course as a new template or standard course:

1. Select the **Courses** area.
2. Select the **All Courses** tab to display the **Courses** search page.

3. Click the **Add New Course** button to display the **Add New Course** screen.

Managing Courses



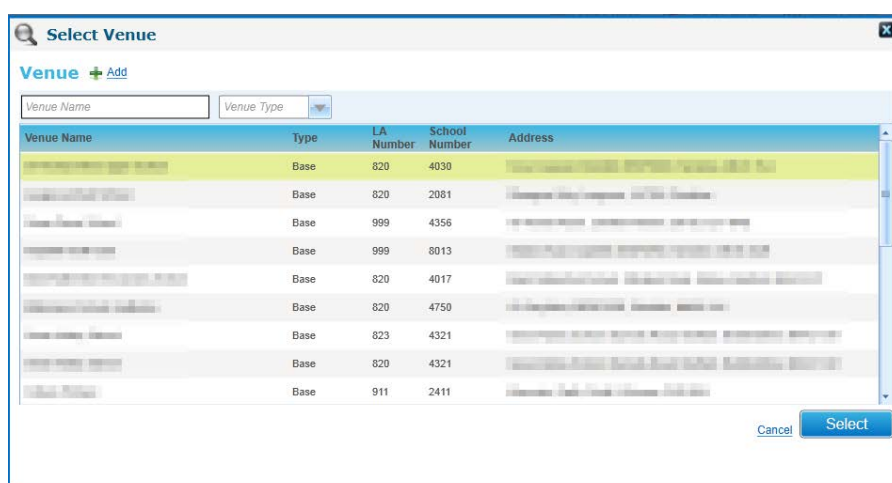
The screenshot shows a web application interface for adding a new course. The top navigation bar includes 'One Home', 'Courses', 'Applications', 'Trainers', 'Music', 'Reports', and 'Administration'. The user is logged in as 'SYSADMIN'. The main content area is titled 'Add New Course' and contains several input fields: 'Training Unit' (a dropdown menu), 'Course Name' (a text box), 'Course Code' (a text box), 'Start Date' (a date picker), 'End Date' (a date picker), 'Places Available' (a text box), 'Minimum Places for Viability' (a text box), 'Venue' (a dropdown menu with a browse button), and 'Course Leader' (a dropdown menu with a browse button). At the bottom right, there are three buttons: 'Cancel', 'Save as Template', and 'Create Course'.

Entering New Course Details

1. Select a **Training Unit** from the drop-down list.
2. Enter a **Course Name**.
3. Enter a **Course Code**.

For a new course, enter both parts of the **Course Code**. For a new course template, enter the first part of the **Course Code** only.

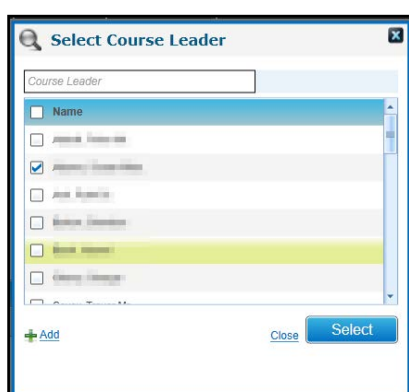
4. Select a **Start Date** and **End Date**.
5. If this is to be saved as a course, you can enter the number of **Places Available** and **Minimum Places for Viability**.
6. If required, add a venue:
 - a. Click the **Venue** browse button to display the **Select Venue** window.



The screenshot shows a 'Select Venue' window. It has a search bar for 'Venue Name' and a 'Venue Type' dropdown. Below is a table with the following columns: 'Venue Name', 'Type', 'LA Number', 'School Number', and 'Address'. The first row is highlighted in yellow. At the bottom right, there are 'Cancel' and 'Select' buttons.

Venue Name	Type	LA Number	School Number	Address
	Base	820	4030	
	Base	820	2081	
	Base	999	4356	
	Base	999	8013	
	Base	820	4017	
	Base	820	4750	
	Base	823	4321	
	Base	820	4321	
	Base	911	2411	

- b. Select a **Venue Name** and click the **Select** button.
 - c. Alternatively, click the **Add** button to add a new venue.
7. If required, add a **Course Leader**:
 - a. Click the **Course Leader** browse button to display the **Select Course Leader** window.



The screenshot shows a 'Select Course Leader' window. It has a search bar for 'Course Leader'. Below is a list of course leaders with checkboxes next to their names. The first row is highlighted in yellow. At the bottom, there are 'Add', 'Close', and 'Select' buttons.

- b. Select a **Name** and click the **Select** button.

Alternatively, click the **Add** button to display the **Person Search** to add a new course leader.

For more information, see [Selecting a Person using Person Search on page 32](#).

- 8. Click the **Create Course** button.

Alternatively, to save the details as a template, click the **Save as Template** button.

NOTES: Any additional questions defined for the training unit or template are inherited by the new course. After the course has been created, these additional questions can be updated independently of the training unit or template.

When a one-day course is created, a session is also created for that course with the same dates. The session details can be edited.

Searching for a Course

The **Courses** search is used to find available courses. You can enter search criteria to limit the courses displayed in the list. If the required course is not listed, it can be added or cloned from an existing course.

More Information:

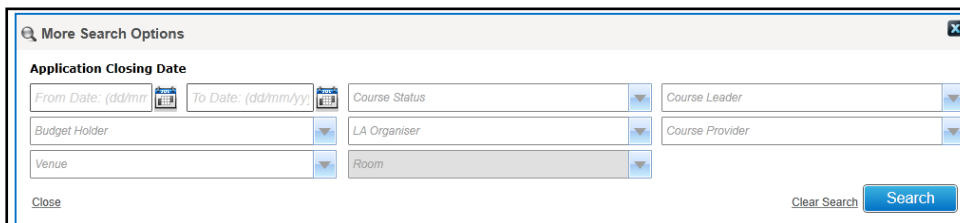
[Adding a New Course on page 67](#).

[Cloning a Course on page 70](#).



1. Select the **Courses** area.
2. Ensure that the **All Courses** tab is selected.
3. Enter the required search criteria.
4. If required, select the **Inactive TU also check box** to search for courses for inactive training units in addition to active training units.

You can click the **More Options** button to display further search criteria.



5. Click the **Search** button to display matching courses.

Managing Courses

Course	Start Date	End Date	Application Closing Date	Places	Filled	Spaces	Status
...	01/06/2014	30/06/2014		10	0	10	Cancelled
...	01/06/2014	06/09/2014		1	0	1	Planned
...	25/07/2014	26/07/2014		0	0	0	Planned
...	24/07/2014	09/08/2014		0	0	0	Planned
...	24/07/2014	26/07/2014		0	0	0	Planned
...	23/07/2014	09/08/2014		0	0	0	Planned

Cloning a Course

A new course can be created by cloning the details from an existing course. In addition to the course details, any pre-course information, narration memos, UDFs or additional questions configured for the existing course are copied to the new course.

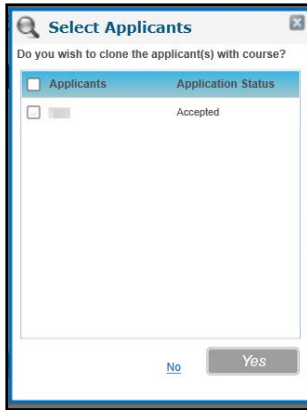
NOTE: When cloning a course with sessions, session details are only cloned to the new course if the sessions in the existing course are spread across a maximum of two days (based on the course start date and the course end date).

1. Search for the required course.

For more information, see [Searching for a Course](#) on page 69.

2. Select a course in the list to display the details.

3. Click the **Clone Course** button to display the **Select Applicants** window, which enables you to select the applicants from the existing course and copy them to the cloned course.



4. Select the required **Applicants** and click the **Yes** button to clone the applicants with the course. The **Add New Course** page is displayed with the details of the existing course.



5. Enter the details of the new course.
6. Click the **Create Course** button.

Viewing Basic Course Details

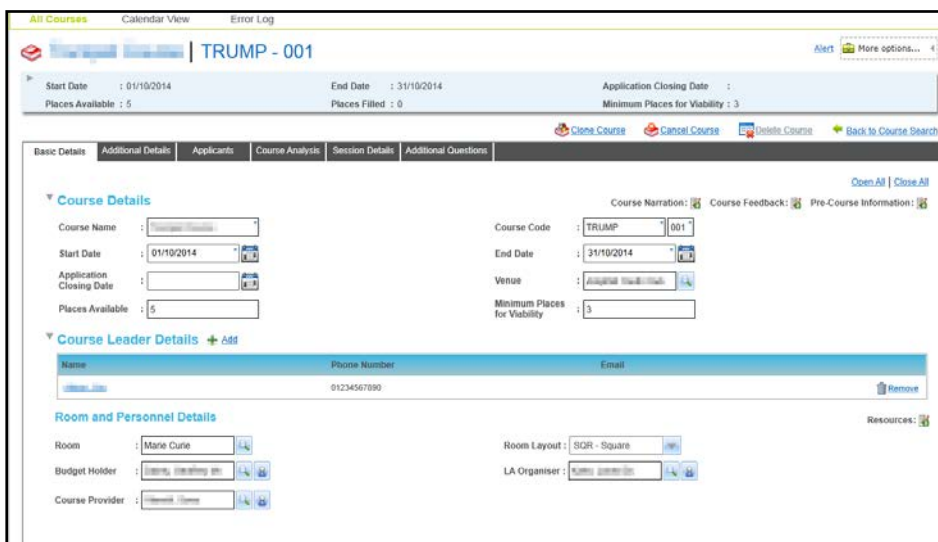
1. Search for the required course.

For more information, see [Searching for a Course](#) on page 69.

2. Select a course in the list to display the details.

The course summary is displayed in the panel at the top of the page.

The **Basic Details** tab is displayed below the summary as shown in the following graphic:



If required, click the expand button to display more details in the summary panel.

You can click the **Back to Course Search** button to select an alternative course from the search results list.

Editing Basic Course Details

1. Search for the required course and view the details.

For more information, see [Viewing Basic Course Details](#) on page 71.

The following information can be updated on the **Course Details** panel:

- a. Enter a new **Course Name**.
- b. Enter a new **Course Code**.
- c. Select a different **Start Date** and **End Date**.
- d. Select an **Application Closing Date**.
- e. Click the **Venue** browse button to select a **Venue**.
- f. Enter the number of **Places Available**.
- g. If required, enter the number of **Minimum Places for Viability**.

2. Click the **Save** button.

The following information can be updated on the **Course Leader Details** panel:

Adding Course Leaders to a Course

1. Click the **Add** button to display the **Select Course Leader** window.

2. Select one or more **Names** in the list.
3. Click the **Select** button.

If the required person is not in the list, click the **Add** button to display the **Person Search** to add a new course leader.

For more information, see [Selecting a Person using Person Search](#) on page 32.

Removing a Course Leader from a Course

1. Click the **Remove** button to display a confirmation message.
2. Click the **Yes** button to remove the course leader.

Editing Room and Personnel Details

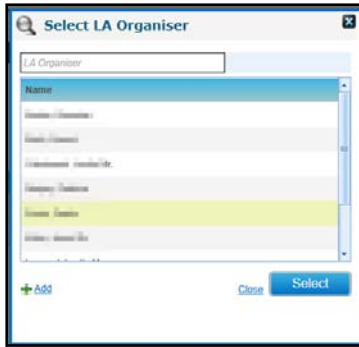
1. Ensure that a **Venue** is selected on the **Course Details** panel to enable the **Room** browse.

2. Click the **Room** browse button to display the **Select a Room** window. Rooms associated with the venue are listed.

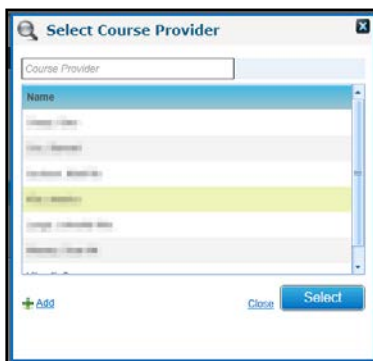
3. Select a room and click the **Select** button.
4. If required, select a **Room Layout** from the drop-down list.
5. Click the **Budget Holder** browse button to display the **Select Budget Holder** dialog.

6. Select a **Name** and click the **Select** button.
7. Click the **LA Organiser** browse button to display the **Select LA Organiser** dialog.

Managing Courses



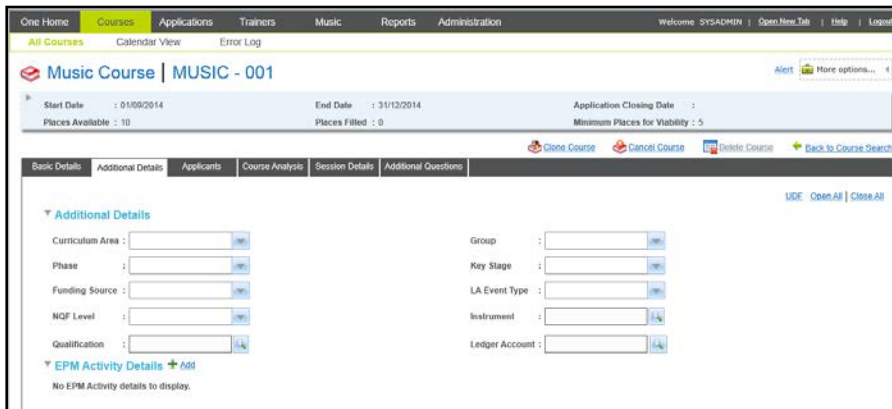
8. Select a **Name** and click the **Select** button.
Alternatively, click the **Add** button to display the **Person Search** to add a new **LA Organiser**.
For more information, see [Selecting a Person using Person Search](#) on page 32.
9. Click the **Course Provider** browse button to display the **Select Course Provider** dialog.



10. Select a **Name** in the list and click the **Select** button.
Alternatively, click the **Add** button to display the **Person Search** to add a new **Course Provider**.
For more information, see [Selecting a Person using Person Search](#) on page 32.
11. Click the **Save** button.

Editing Additional Course Details

1. Search for the required course and view the **Additional Details** page.
For more information, see [Viewing Additional Course Details](#) on page 76.

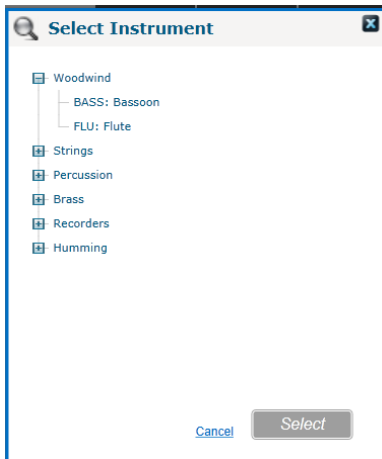


2. Edit the following information as required:
 - **Curriculum Area** (Lookup Table ID: 0117)

- **Group** (Lookup Table ID: 0115)
- **Phase** (Lookup Table ID: 0215)
- **Key Stage** (Lookup Table ID: 0216)
- **Funding Source** (Lookup Table ID: 0227)
- **NQF Level** (Lookup Table ID: 0575)
- **LA Event Type** (Lookup Table ID: 0114)

3. To add an **Instrument**:

- a. Click the **Instrument** browse button to display the **Select Instrument** dialog.



Select the required instrument type and click the **Select** button.

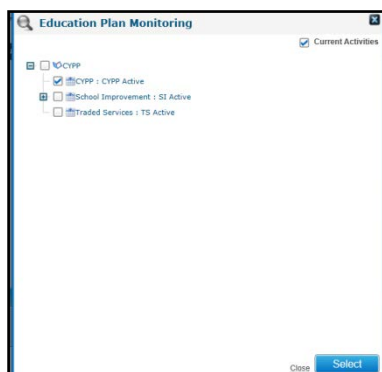
4. If required, add a Ledger Account.

- a. Click the **Ledger Account** browse button to display the **Select Ledger Accounts** window. If required enter a **Ledger Code** or **Name** to filter the list.
- b. Select the required **Code** and click the **Select** button.

NOTE: In order to create a financial transaction for a course, such as raising a purchase order or a sales transaction, you need to associate the course with a Nominal Ledger. Otherwise, the **More Options | Billing** link will not be enabled. For more information, see [Managing Course Billing](#) on page 101.

5. If required, add **EPM Activities** on the **EPM Activity Details** panel:

- a. Click the **Add** button to display the **Education Plan Monitoring** dialog.



- b. Select the required activity and click the **Select** button.

6. Click the **Save** button.

Viewing Additional Course Details

The **Additional Details** tab is used to record additional, optional information about the course. The course can be linked to one or more Education Plan Monitoring activities or targets.

1. Search for the required course.
For more information, see [Searching for a Course](#) on page 69.
2. Select a course in the list to display the details.
3. Select the **Additional Details** tab to display the **Additional Details** panel.

Managing Additional Questions

Additional questions defined for a training unit or course template are inherited by courses or course templates created for the training unit. Once the course has been created, you can add additional questions or remove additional questions for the course without affecting the training unit's or course template's questions. Similarly if questions at the training unit or template level are amended after a course has been created, this does not affect existing courses questions. It only affects new courses.

NOTE: If the Local Authority has a licence for Training Manager Online and publishes Training Manager courses online, then the text here will be displayed when capturing application details. Courses associated with the Music training unit are not published online. However, additional questions can still be captured for back office applications.

Adding Additional Questions to a Course

Additional questions can be added to the course independently of the training unit. They are not inherited by new courses created for this training unit.

1. Open the required course and select the **Additional Question** tab.
For more information, see [Viewing Additional Questions](#) on page 77.
2. Click the **Add** button to display the **Add Additional Question** screen.

3. Select a **Type** from the drop-down list depending on the type of information you wish to capture. This includes **URL**, **Integer**, **Rate**, **Text**, **Dropdown**, **Paragraph** and **Checkbox**.
4. Enter the text for the **Question**.

- To make this question mandatory, select the **Mandatory** check box.
- Click the **Save** button.

Order	Type	Question	Mandatory
1	Text	Preferred Name	No
2	Integer	Age	No

- If required, click the **Order** arrows to change the order that the questions are displayed.

Viewing Additional Questions

- Search for the required course.

For more information, see [Searching for a Course](#) on page 69.

- Select a course in the list to display the details.
- Select the **Additional Question** tab.

Order	Type	Question	Mandatory
1	Email-id		No
2	Email-id		Yes

The question details can be displayed by clicking the **Details** button.

Deleting Additional Questions from a Course

Additional questions can be removed from the course without affecting the training unit.

- Search for a course and select the **Additional Question** tab.

For more information, see [Viewing Additional Questions](#) on page 77.

- Click the **Delete** button to display a confirmation message.
- Click the **Yes** button to delete the question from the course.

Managing Session Details

If courses are broken down into sessions, these can be recorded to represent sessions on different days or different times of the day. For Music Tuition, you can set up courses to run for an academic year or a term which have recurring sessions set up, e.g. once a week.

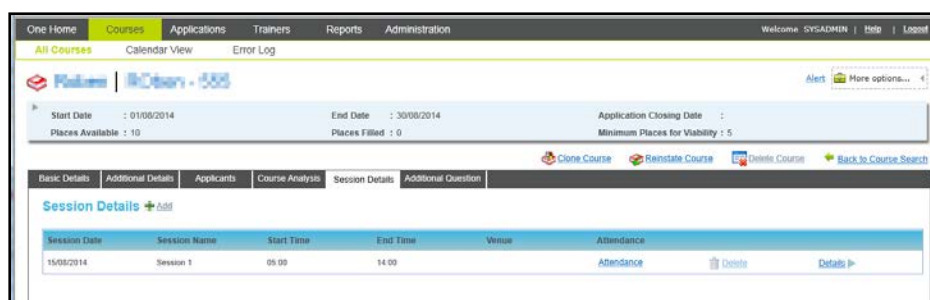
Information recorded includes the start and end time of each session, the venue, session leader and the attendance. Recurring sessions can be set up.

NOTE: Multiple sessions for a course can have the same start date and time enabling you to create sessions that run concurrently or in parallel to each other.

- Search for the required course.

For more information, see [Searching for a Course](#) on page 69.

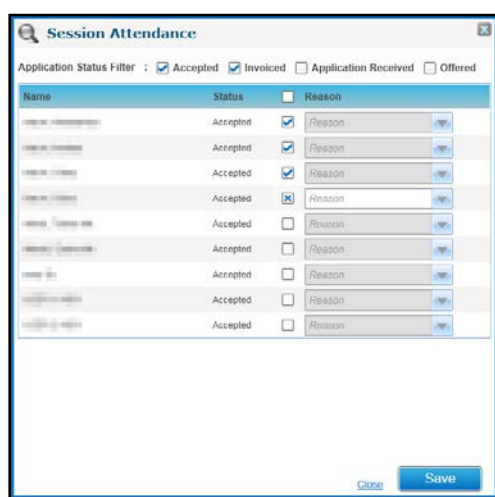
- Select a course in the list to display the details.
- Select the **Session Details** tab to display the **Session Details** page.



Recording Attendance for a Session

Attendance can be recorded for an individual session if the application status is Accepted, Invoiced, Received or Offered.

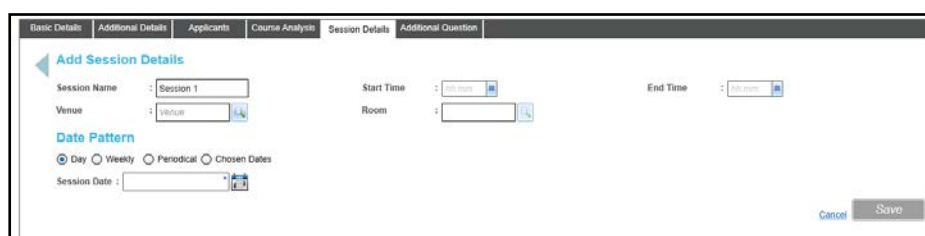
1. Click the **Attendance** button to display the **Session Attendance** dialog.
2. If required, select one or more **Application Status Filter** check boxes to display matching applications.



3. For each applicant, select the check box to display a tick if they attended the session. Alternatively select the check box to display a cross if the applicant did not attend the session. A **Reason** for non-attendance can be selected from the drop-down list.
4. Click the **Save** button.

Adding a Session to a Course

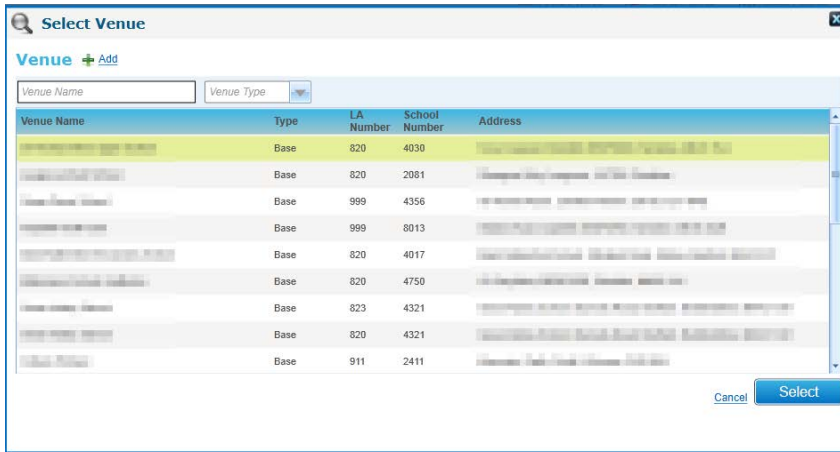
1. Click the **Add** button to display the **Add Session Details** and **Date Pattern** panels.



2. If required, enter a **Session Name**, a **Start Time** and **End Time**.

NOTE: If start and end times are recorded for the training unit, these are automatically completed.

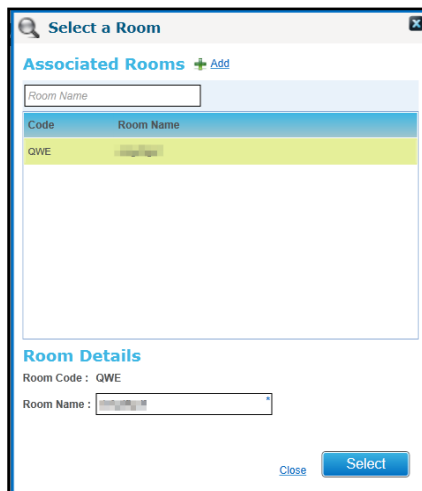
3. If required, select a **Venue** and **Room**:
 - a. Click the browse button to display the **Select a Venue** dialog.



b. Select the required venue and click the **Select** button.

Alternatively, click the **Add** button to add a new venue. For more information see [Adding a Venue](#) on page 80.

c. If required, click the browse button to display the **Select a Room** dialog.



d. Select the required room and click the **Select** button.

4. Select a **Date Pattern** for the session by selecting one of the radio buttons and entering the dates and days for the session:

- **Day:** select a **Session Date**.
- **Weekly:** select a **Start Date** and **End Date**. Select the check boxes for the required **Days of the week**.
- **Periodical:** Enter the number of **Days** between sessions. Select a **Start Date** and **End Date**. If required, select the **Week Days Only** check box.
- **Chosen Dates:** Select the check boxes for the required **Dates**.

5. Click the **Save** button.

6. A confirmation message is displayed:

Do you wish to inherit defined Course Leaders for the created Session(s)?

7. Click the **Yes** button to update the **Session Leader** panel with the course leader details.

Viewing Details of a Session

Click the **Details** button to display the **Session Details** page.

Managing Courses

Adding a Venue

A new venue can be added and associated with a session, course or a course template.

1. From within the **Session Details**, **Course details** or **Course Template details** page, click the **Venue** browse to display the **Select Venue** dialog.
2. Click the **Add** button to display the **Add New Venue** panel.

3. Select the **Venue Type** from the drop-down.
4. Click the **Venue Name** browse button to display the **Select Venue** window listing all venues associated with the selected **Venue Type**.

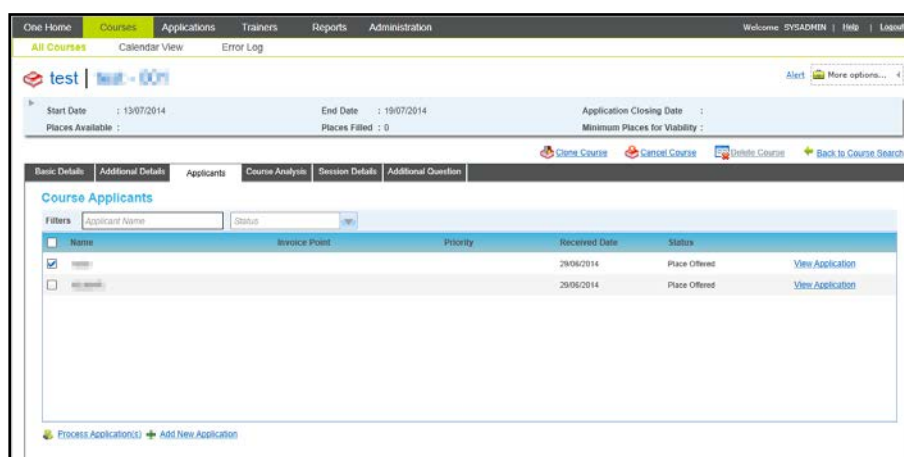
5. Select the required venue and click the **Select** button.

6. Click the **Save** button.

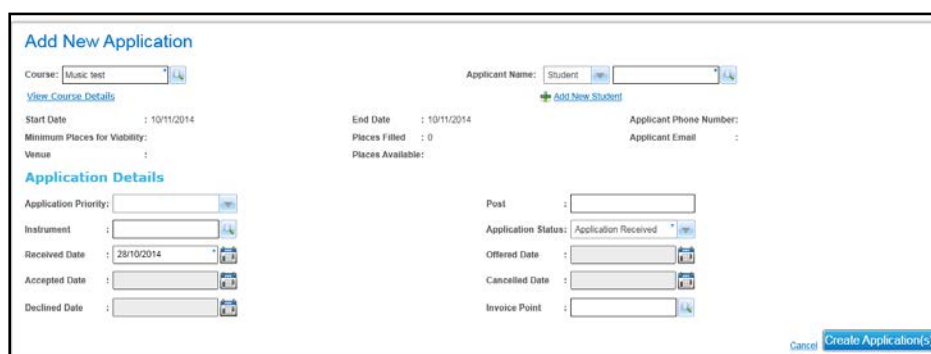
Adding a New Application

New applications for the selected course can be added via the **Applicants** tab or the **Applications** focus.

For more information, see [Managing Applications](#) on page 105.



1. Open the **Course Applicants** list for the required course.
For more information, see [Viewing Course Applicants](#) on page 81.
2. Click the **Add New Application** button to display the **Add New Application** window.



3. Enter the following details:
 - a. Select an Applicant.
For more information, see [Selecting an Applicant](#) on page 122.
 - b. Enter the **Application Details**:
For more information, see [Entering Application Details](#) on page 119.
4. Click the **Create Application(s)** button.

NOTE: When an application is created for a multi-session course, the applicant is automatically associated with all sessions. If required, they can be removed from sessions.

For more information, see [Removing an Applicant from a Session](#) on page 83.

Managing Course Applicants

Applicants for a course can be viewed and processed via the **Applicants** tab.

The **Applicants** tab is accessed via the **Courses | All Courses** area. It enables you to view the applicants for a particular course, view the details of their application, change the status or transfer their application to an alternative course.

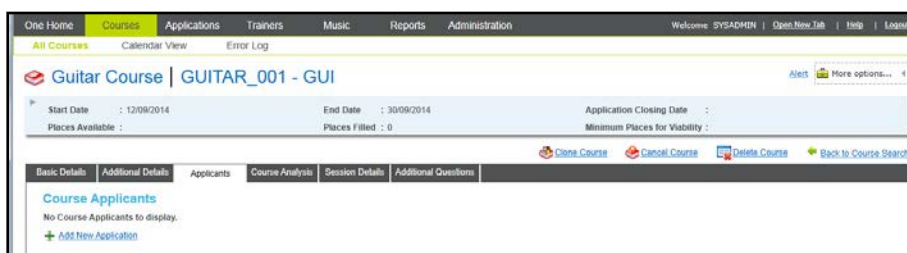
Viewing Course Applicants

1. Search for the required course.

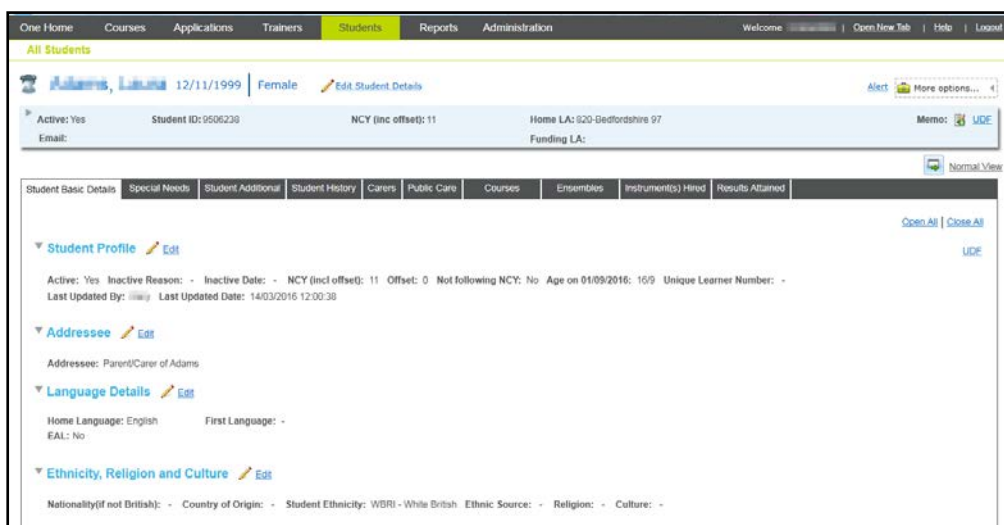
Managing Courses

For more information, see [Searching for a Course](#) on page 69.

2. Select a course in the list to display the details.
3. Select the **Applicants** tab to display the **Course Applicants** panel.

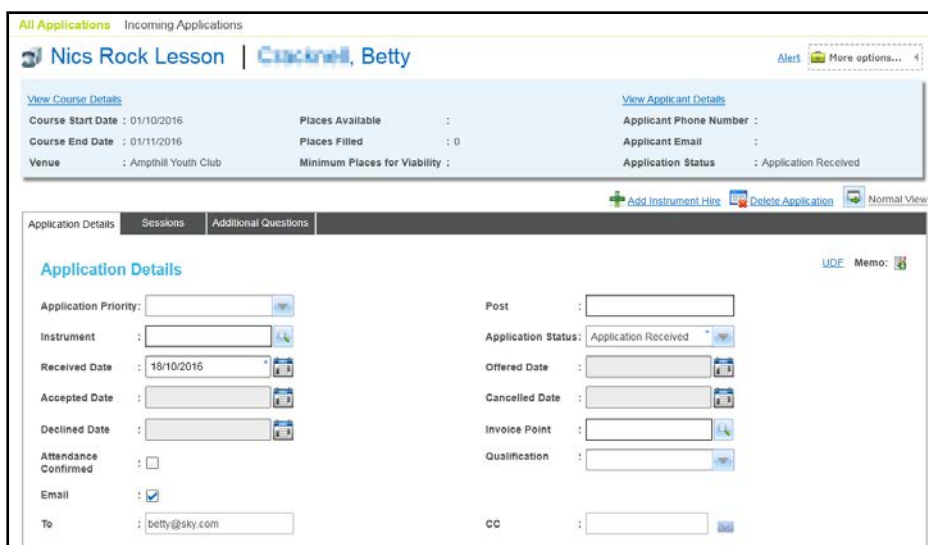


4. If required, filter the list of **Course Applicants**.
5. If required click the **Name** hyperlink to view the student details.



Viewing Application Details

1. Open the **Course Applicants** list for the required course.
For more information, see [Viewing Course Applicants](#) on page 81.
2. Click the **View Application** button to display the **Application Details** screen.



Adding Instrument Hire

Instrument Hire details can be added from the **Application Details** page.

Click the **Add Instrument Hire** button to display the **Instruments** page.

For more information, see [Maintaining Instrument Hire and Repair](#) on page 158.

Viewing an Applicant's Sessions

The **Session Details** page shows whether the course applicant is attending all available sessions for the course or selected sessions only.

1. Open the details for the required applicant.

For more information, see [Viewing Application Details](#) on page 82.

2. Select the **Sessions** tab to display the **Session Details** page.

Test Course | 15297, Student02

View Course Details: Course Start Date : 22/09/2014, Course End Date : 30/10/2014, Venue : ...

View Applicant Details: Applicant Phone Number : ..., Applicant Email : ..., Application Status : Application Received

Application Details | Sessions | Additional Questions

Session Details

Associated Session(s) : All available session(s) Selected session(s) only

Session(s)
Applicant is attending all session(s).

Removing an Applicant from a Session

When an applicant is added to a multi-session course they are automatically assigned to all available sessions. If an applicant should not be assigned to all of the sessions, they can be removed from the session.

To remove an applicant from a session:

1. Open the details for the required applicant.

2. For more information, see [Viewing Application Details](#) on page 82.

3. Select the **Sessions** tab to display the **Session Details** page.

Application Details | Sessions | Additional Questions

Session Details

Associated Session(s) : All available session(s) Selected session(s) only

Session Name	Session Date	Start Time	End Time	Venue
Session 1	30/09/2016	09:00	12:00	
Session 2	30/09/2016	13:00	16:00	

Applicant is attending all session(s).

4. Select the **Selected sessions(s) only** radio button.

Application Details | Sessions | Additional Questions

Session Details

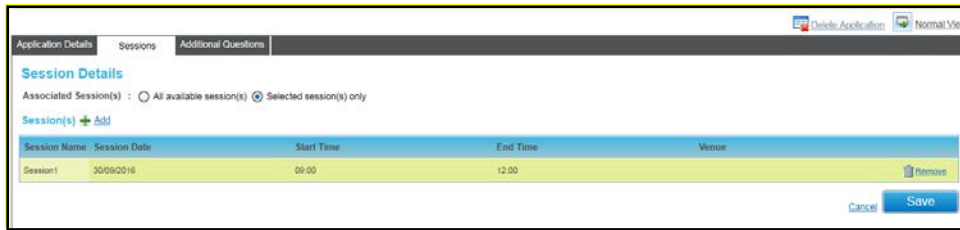
Associated Session(s) : All available session(s) Selected session(s) only

Session(s) + Add

Session Name	Session Date	Start Time	End Time	Venue	
Session 1	30/09/2016	09:00	12:00		Remove
Session 2	30/09/2016	13:00	16:00		Remove

5. Click the **Remove** button adjacent to the required session.

Managing Courses

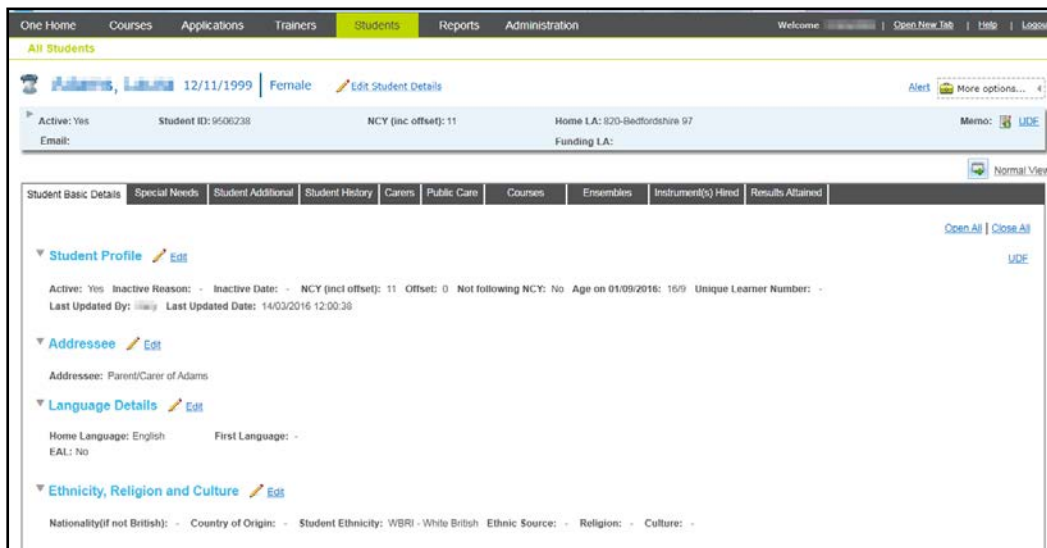


6. Click the **Save** button.

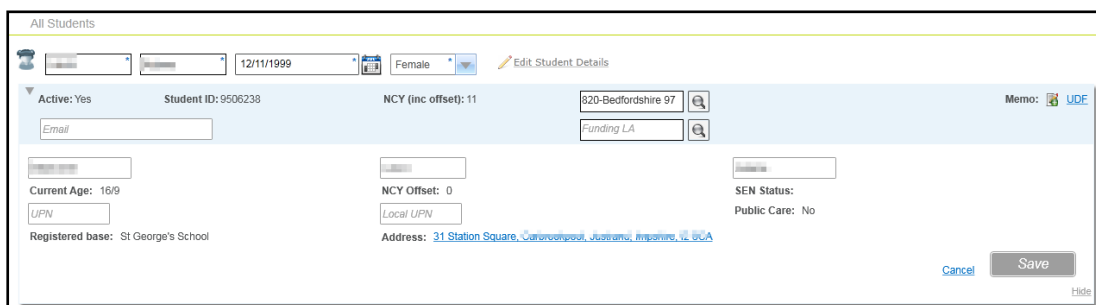
Updating an Applicant's Details

Updating Student Details

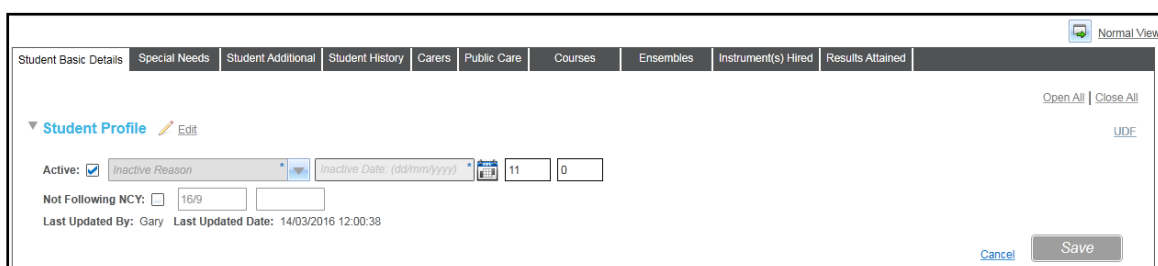
1. View the course applicants and click the name hyperlink to display the **Students | All Students** page. For more information, see [Viewing Course Applicants](#) on page 81.



2. If required, click the **Edit Student Details** link to display the summary details in edit mode.



3. Make the required changes and click the **Save** button.
4. If required, select one of the sub-tabs and click the **Edit** button. The following graphic displays the **Student Basic Details** sub-tab in edit mode:



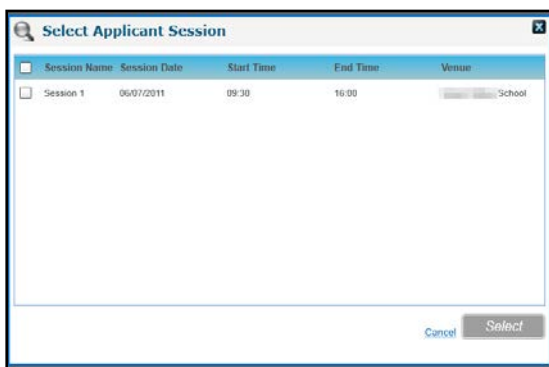
- Update the details and click the **Save** button.

Updating an Applicant's Session Details

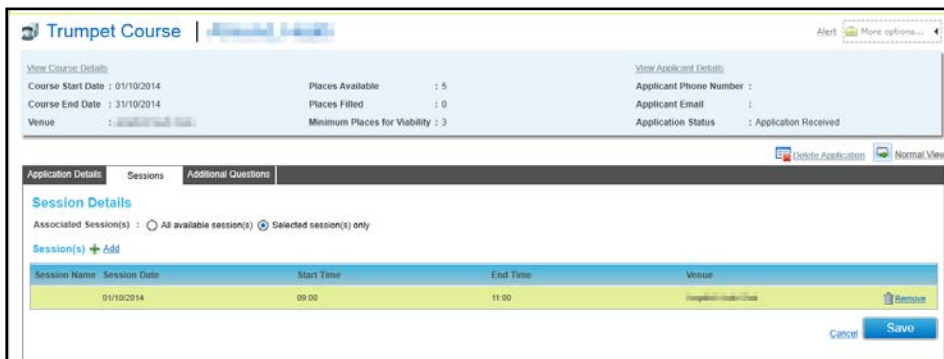
The session details can be updated to reflect whether the applicant is attending all sessions or selected sessions only.

NOTE: Attendance for courses is recorded via the **Courses | Basic Details | Session Details** tab. Sessions can be set up as regular recurring tuition sessions. For more information, see [Managing Session Details](#) on page 77.

- Open the details for the required applicant.
For more information, see [Viewing Application Details](#) on page 82.
- If required, click the **Selected sessions(s) only** radio button to display the **Select Applicant Session** dialog.



- Select the required sessions and click the **Select** button.



- Click the **Save** button.

Updating Additional Questions for an Application

Additional questions can be added for a training unit, a course template or an individual course.

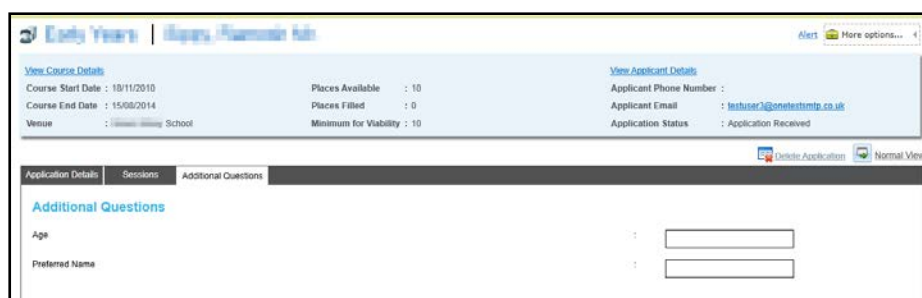
More Information:

[Adding Additional Questions for a Training Unit](#) on page 21
[Managing Additional Questions](#) on page 76.

To record the information in the additional questions for an application:

- Open the application details.
For more information, see [Viewing Application Details](#) on page 82.
- Select the **Additional Questions** tab.

Managing Courses



The screenshot shows a web interface for managing course applications. At the top, there are tabs for 'View Course Details' and 'View Applicant Details'. Below these, there are fields for 'Course Start Date', 'Course End Date', 'Venue', 'Places Available', 'Places Filled', and 'Minimum for Viability'. The 'View Applicant Details' section shows 'Applicant Phone Number', 'Applicant Email', and 'Application Status'. The main content area is titled 'Additional Questions' and contains two input fields: 'Age' and 'Preferred Name'.

3. Enter the information for this application.
4. Click the **Save** button.

Processing an Application

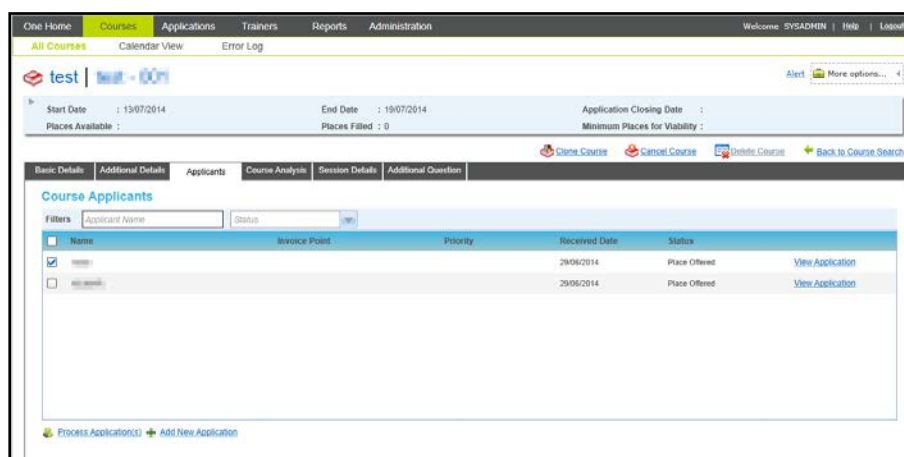
Applications for a course can be processed via the **Courses | Applicants** area. The status of the applications can be changed or the applications can be transferred to an alternative course.

Changing the Status of an Application

The status of one or more applications can be changed.

1. Open the **Course Applicants** list for the required course.

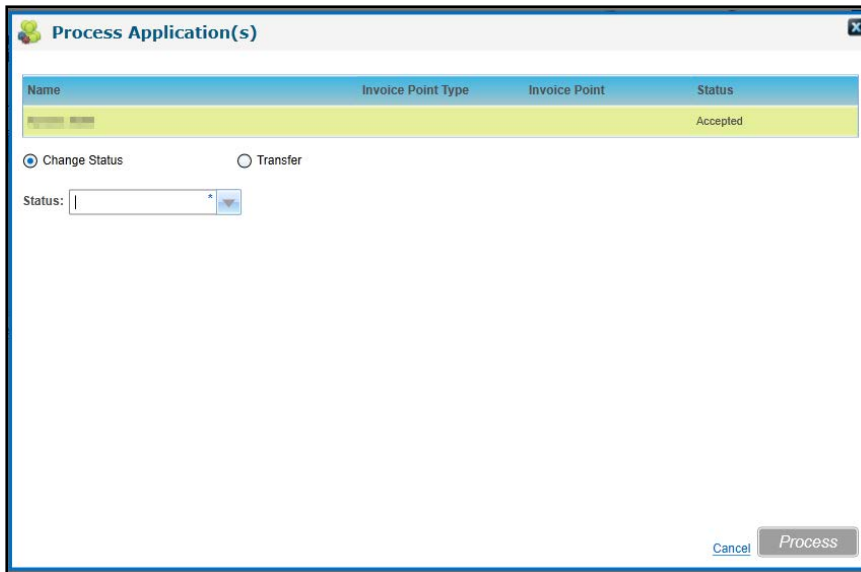
For more information, see [Viewing Course Applicants](#) on page 81.



The screenshot shows a web interface for managing course applications. At the top, there are tabs for 'Basic Details', 'Additional Details', 'Applicants', 'Course Analysis', 'Session Details', and 'Additional Question'. The main content area is titled 'Course Applicants' and contains a table with columns for 'Name', 'Invoice Point', 'Priority', 'Received Date', and 'Status'. There are two rows of data, each with a checkbox in the 'Name' column and a 'View Application' link in the 'Status' column.

Name	Invoice Point	Priority	Received Date	Status
<input checked="" type="checkbox"/> Name			29/06/2014	Place Offered View Application
<input type="checkbox"/> Name			29/06/2014	Place Offered View Application

2. Select the check box for one or more **Course Applicants**.
3. Click the **Process Application(s)** button to display the **Process Application(s)** window.



4. Ensure that the **Change Status** radio button is selected.
5. Select a **Status** from the drop-down list.
6. Click the **Process** button.

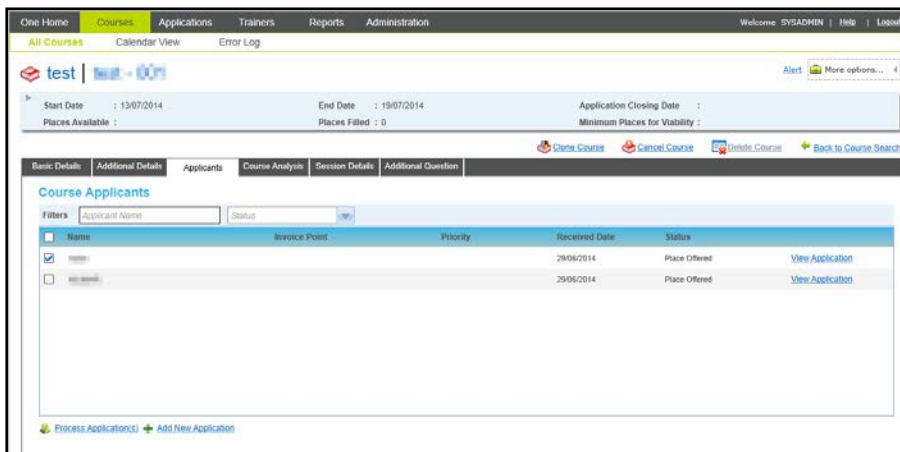
NOTES: An application **Status** of **Invoiced**, **Cancelled** or **Transferred** cannot be changed to **Applicant Declined** or **Authority Declined**.

Transferring an Application

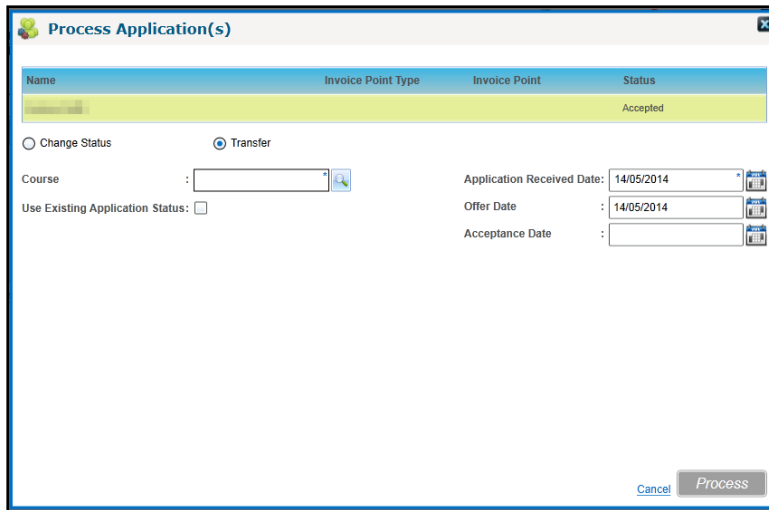
Applications can be transferred to another course.

1. Open the **Course Applicants** list for the required course.

For more information, see [Viewing Course Applicants](#) on page 81.



2. Select the check box for one or more **Course Applicants**.
3. Click the **Process Application(s)** button to display the **Process Application(s)** window.
4. Select the **Transfer** radio button.



5. Click the **Course** browse button to display the **Select Course** window and select the new course for this application.

For more information, see [Selecting a Course](#) on page 107.

6. If required, select the **Use Existing Application Status** check box to copy the dates from the existing application to the new course.

Alternatively, select new dates for **Application Received Date**, **Offer Date** and **Acceptance Date**.

7. Click the **Process** button.

If there are insufficient places available on the course, the following message is displayed:

Only n places are available on this course. Do you wish to continue?

If you want to transfer the applications regardless, click the **Yes** button.

NOTE: If an applicant has a status of **Attended**, they cannot be transferred. If any of the selected applicants has already been invoiced for a course, a warning message is displayed.

Managing Course Analysis

Course analysis defaults are defined for a training unit on the **Analysis Defaults** tab accessed via **Administration | Training Unit**.

For more information, see [Adding Analysis Defaults](#) on page 21.

This can be used to gather ranked feedback from course attendees.

The defaults are used in the course analysis for courses associated with the training unit.

1. Search for the required course.

For more information, see [Searching for a Course](#) on page 69.

2. Select a course in the list to display the details.

3. Select the **Course Analysis** tab to display the **Course Analysis** page.



Adding Course Analysis

1. Click the **Add** button to display the course analysis defaults for the training unit.

2. For each course analysis default, select a value from the drop-down list.
3. Click the **Save** button.

NOTE: The count, average and spread of the entries is calculated and displayed for each of the assigned categories (as defined in **Administration | Training Unit | Analysis Defaults** tab).

Cancelling a Course

A course can be cancelled without deleting it. It can then be reinstated, if required.

1. Search for the required course.
For more information, see [Searching for a Course](#) on page 69.
2. Select a course in the list to display the details.

3. Click the **Cancel Course** button to display the **Cancel Course** window.

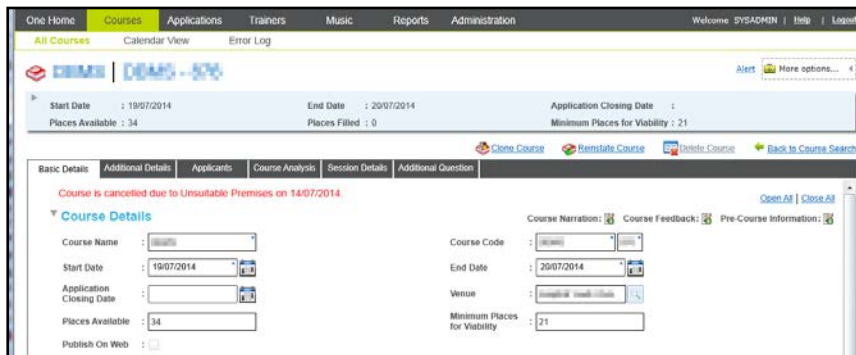
4. Select a **Reason** from the drop-down list.
5. Click the **Save** button to cancel the course.

Reinstating a Course

A previously cancelled course can be reinstated.

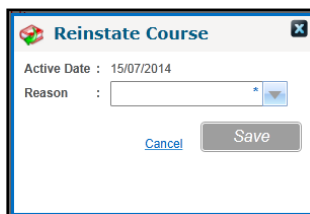
Managing Courses

1. Search for the required course.
For more information, see [Searching for a Course](#) on page 69.
2. Select a course in the list to display the details.



The screenshot shows the 'Courses' management interface. At the top, there are navigation tabs: 'All Courses', 'Calendar View', and 'Error Log'. Below this, there's a header with 'Start Date : 19/07/2014', 'End Date : 20/07/2014', 'Application Closing Date', and 'Minimum Places for Viability : 21'. A red message states 'Course is cancelled due to Unsuitable Premises on 14/07/2014'. The 'Course Details' section includes fields for Course Name, Start Date (19/07/2014), End Date (20/07/2014), Application Closing Date, Places Available (34), and Publish On Web. There are also buttons for 'Clone Course', 'Reinstate Course', and 'Delete Course'.

3. Click the **Reinstate Course** button to display the **Reinstate Course** window.



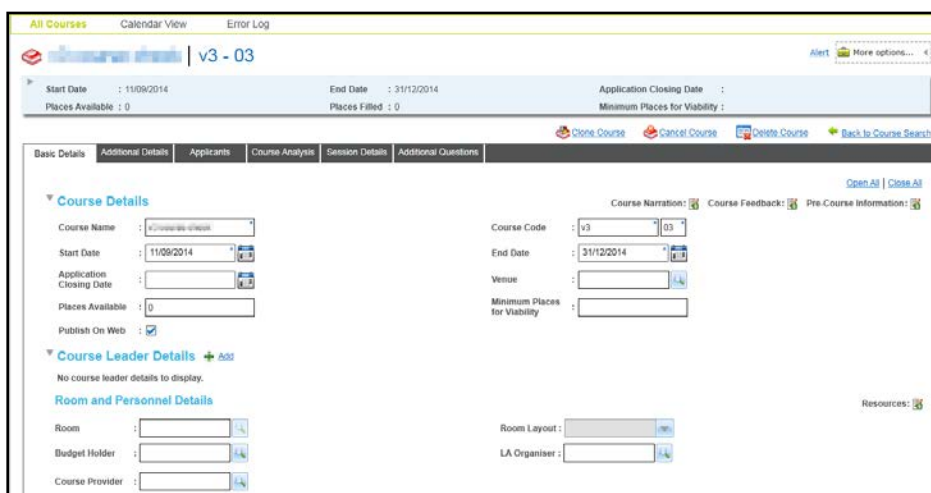
The 'Reinstate Course' dialog box is shown. It has a title bar with a close button. Inside, there's a field for 'Active Date : 15/07/2014' and a 'Reason' field with a drop-down arrow. At the bottom, there are 'Cancel' and 'Save' buttons.

4. Select a **Reason** from the drop-down list.
5. Click the **Save** button.

Deleting a Course

Courses that have been set up in error can be deleted if they have no associated applications. Deleted courses are permanently removed and cannot be reinstated.

1. Search for the required course.
For more information, see [Searching for a Course](#) on page 69.
2. Select a course in the list to display the details.



The screenshot shows the 'Courses' management interface for a course with 'v3 - 03' as the course code. The 'Start Date' is 11/09/2014 and the 'End Date' is 31/12/2014. 'Places Available' is 0 and 'Places Filled' is 0. The 'Course Details' section includes fields for Course Name, Start Date (11/09/2014), End Date (31/12/2014), Application Closing Date, Places Available (0), and Publish On Web (checked). There are buttons for 'Clone Course', 'Cancel Course', and 'Delete Course'. Below this, there's a 'Course Leader Details' section with a plus sign and 'Add' button, and a 'Room and Personnel Details' section with fields for Room, Budget Holder, Course Provider, Room Layout, and LA Organiser.

3. Click the **Delete Course** button to display a confirmation message.
4. Click the **Yes** button to delete the course.

Managing Course Templates

Course templates can be set up for a range of standard courses.

NOTE: Sessions cannot be associated with course templates.

Adding a New Course Template

A course template is created when you click the **Save as Template** button on the **Add New Course** screen.

More Information:

[Adding a New Course](#) on page 67.

Viewing Course Template Details

1. Select the **Courses** area.
2. Ensure that the **All Courses** tab is selected.
3. Select the **Template Only** check box.
4. Ensure that the **Music Tuition** training unit is selected.
5. Enter your search criteria. For more criteria, click the **More Options** button to display the **More Search Options** window.
6. Click the **Search** button.

NOTE: The search fields only display the values linked to the courses with which you are associated.

If there is only one matching course template, the details are automatically displayed.

If more than one template matches the search criteria, a list of templates is displayed. Select the required template and click the **Select** button to display the details.

Editing Course Template Details

Search for a course template and view the details. For more information, see [Viewing Course Template Details](#) on page 91.

The course template details page displays the **Basic Details** tab, **Additional Details** tab and **Additional Questions** tab.

Editing the Basic Template Details

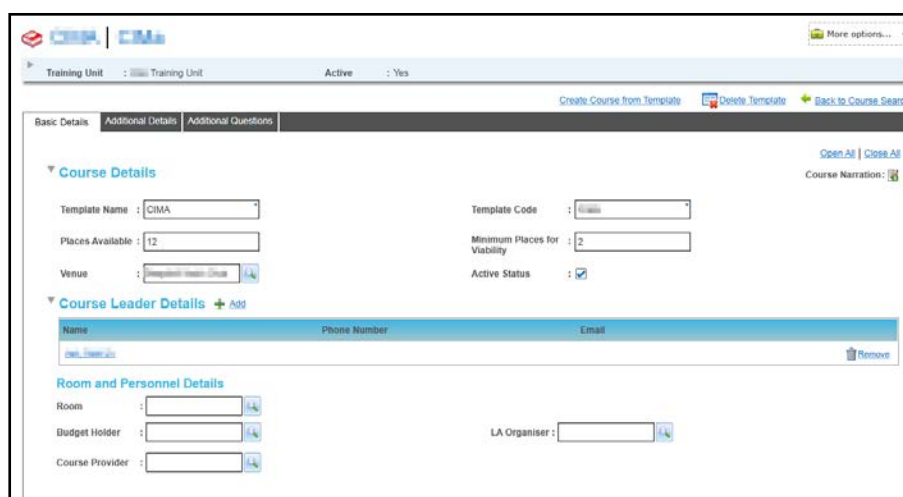
The **Basic Details** tab enables you to edit course details, course leaders, room details and personnel details.

1. Ensure that the **Basic Details** tab is selected.
2. Update the **Course Details** panel as required
3. Click the **Save** button.

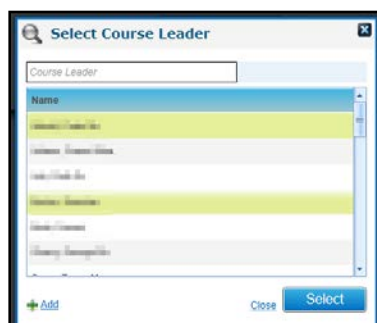
Adding New Course Leaders

The **Course Leader Details** panel is used to record the name and contact details for one or more course leaders associated with this course template. If the course leader has changed you can add or remove them from the **Course Leader Details** panel.

1. Ensure that the **Basic Details** tab is selected.

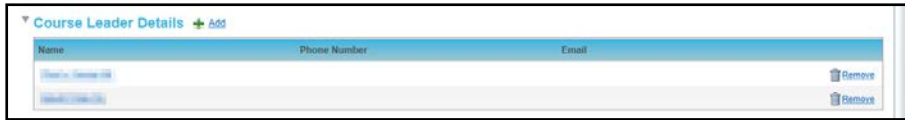


2. Click the **Add** button on the **Course Leader Details** panel to display the **Select Course Leader** window.



3. Select a course leader and click the **Select** button.

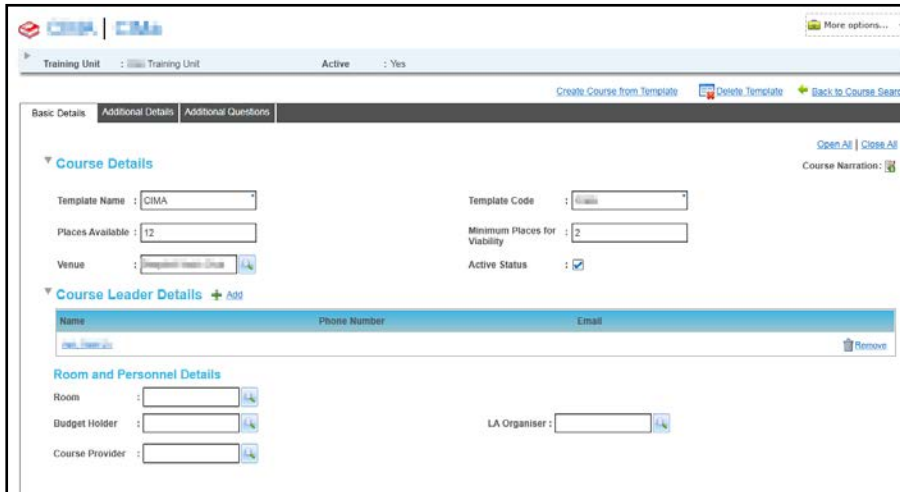
If the required course leader is not listed, click the **Add** button to display the **Person Search**. For more information, see [Selecting a Person using Person Search](#) on page 32.



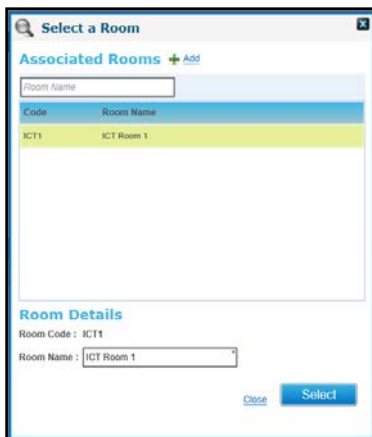
Updating Room and Personnel Details

The **Room and Personnel Details** panel is used to select a room for the course template or to associate a new room with the venue. It is also used to update the personnel details associated with the template.

1. Ensure that the **Basic Details** tab is selected.



2. If a **Venue** is selected on the **Course Details** panel, you can select a room:
 - a. Click the **Room** browse button to display the **Select a Room** window listing all rooms associated with this venue.



- b. Select the required room and click the **Select** button.
3. If the required room is not listed, click the **Add** button to display the **Add New Room** window.




- a. Enter a **Room Code** and **Room Name**.
- b. Click the **Save** button to display the **Basic Details** page.

Managing Courses

4. Click the **Save** button.

Updating Personnel Details

The **Room and Personnel Details** panel is used to record the people organising and administering the course.



Room and Personnel Details

Room : Marie Curie

Budget Holder : Lindsay, Lindsay B

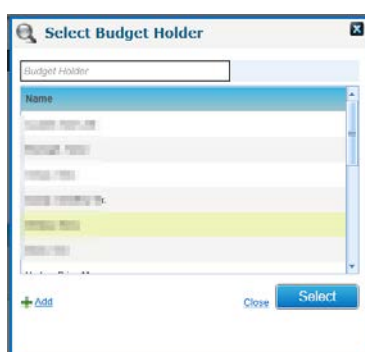
Course Provider : Lindsay, Lindsay

Room Layout : SQR - Square

LA Organiser : Lindsay, Lindsay B

Selecting a Budget Holder

1. Click the **Budget Holder** browse button to display the **Select Budget Holder** dialog.



Select Budget Holder

Budget Holder

Name

Close Select

Add

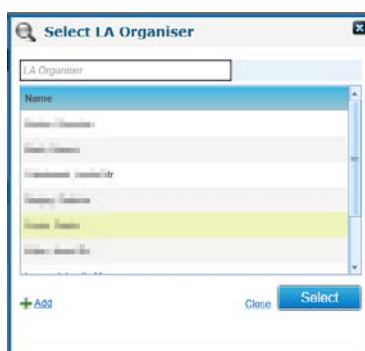
All people that have been assigned the role of Budget Holder are listed.

2. If required, enter a full or partial **Budget Holder** to filter the list.
3. Select the required **Budget Holder** and click the **Select** button.
4. If the required **Name** is not in the list, click the **Add** button to select a new person to assign to this role.

For more information, see [Selecting a Person using Person Search](#) on page 32.

Selecting an LA Organiser

1. Click the **LA Organiser** browse button to display the **Select LA Organiser** window.



Select LA Organiser

LA Organiser

Name

Close Select

Add

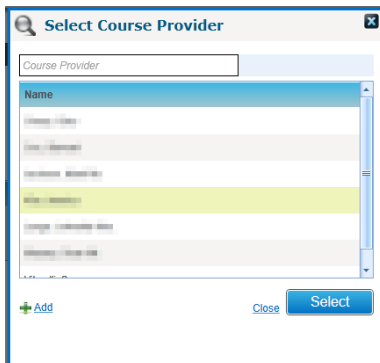
All people that have been assigned the role of LA Organiser are listed.

2. If required, enter a full or partial **LA Organiser** to filter the list.
3. Select the required **LA Organiser** and click the **Select** button.
4. If the required **Name** is not in the list, click the **Add** button to select a new person to assign to this role.

For more information, see [Selecting a Person using Person Search](#) on page 32.

Selecting a Course Provider

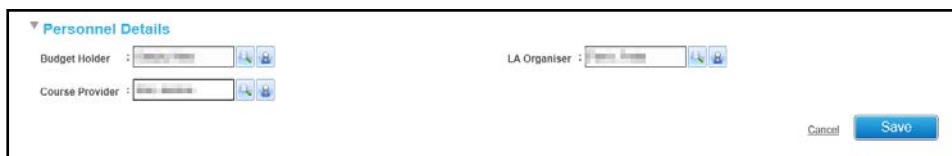
1. Click the **Course Provider** browse button to display the **Select Course Provider** window.



All people associated with the role of Course Provider are listed.

2. If required, enter a full or partial **Course Provider** to filter the list.
3. Select the required **Course Provider** and click the **Select** button.
4. If the required **Name** is not in the list, click the **Add** button to display the **Person Search** to add a new name to the list.

For more information, see [Selecting a Person using Person Search](#) on page 32.



5. Click the **Save** button.

Editing Additional Course Template Details

1. Search for a Course Template and view the template details. For more information, see [Viewing Course Template Details](#) on page 91.
2. Select the **Additional Details** tab.
3. Update the following additional details as required:
 - **Curriculum Area** (*Lookup Table ID: 0117*)
 - **Group** (*Lookup Table ID: 0115*)
 - **Phase** (*Lookup Table ID: 0215*)
 - **Key Stage** (*Lookup Table ID: 0216*)
 - **Funding Source** (*Lookup Table ID: 0227*)
 - **LA Event Type** (*Lookup Table ID: 0114*)
 - **Ledger Account**
4. Click the **Save** button.

Adding Additional Questions to a Template

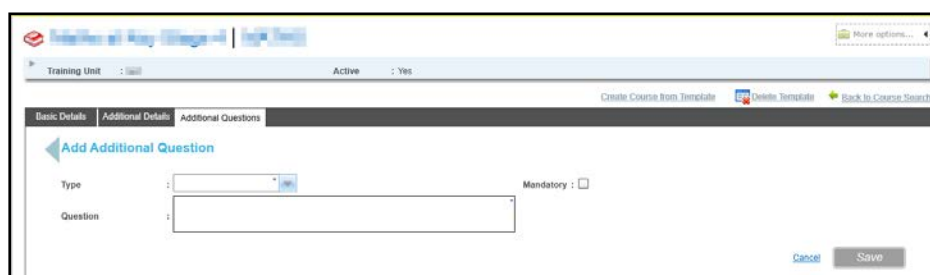
When a template is created, it automatically inherits any additional questions configured for the respective training unit. After creating the template, you can modify, add or remove any of these questions from the template.

Managing Courses

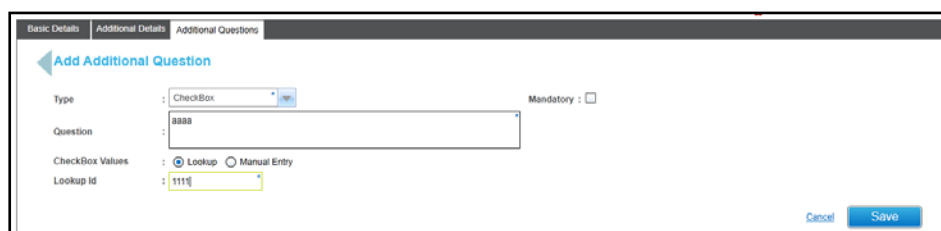
1. Search for a course template and view the template details. For more information, see [Viewing Course Template Details](#) on page 91.
2. Select the **Additional Questions** tab.



3. Click the **Add** button to display the **Add Additional Question** page.



4. Select a **Type** from the drop-down list.
5. If required, select the **Mandatory** check box.
6. Enter a **Question**.
7. If required, enter remaining information depending on the type of question.



8. Click the **Save** button.

Creating Course Details from a Template

A course can be created from a template and it inherits the details from the template. Any pre-course information, narration memos or additional questions defined for the template are copied to the new course.

NOTE: Session details are not recorded for a template. To ensure that session information is inherited by the new course, it is suggested that you clone a course instead. This only applies to courses with sessions across a maximum of 2 days. For more information, see [Cloning a Course](#) on page 70.

1. Search for a course template and view the template details.
For more information, see [Viewing Course Template Details](#) on page 91.

2. Click the **Create Course from Template** button to create a new course.

Managing Courses using the Calendar View

The **Calendar View** tab enables the training administrator to have a full view of the planned courses for the selected month, week or day and monitor resource utilisation for venues, rooms and trainers.

You can choose to view courses for a particular training unit, trainer (music tutor) or venue.

Viewing Courses in Calendar View

1. Select the **Courses** area.
2. Select the **Calendar View** tab.
3. Select the required radio button to view courses for a **Training Unit, Trainer** or **Venue**.

More Information:

[Viewing Courses for a Training Unit](#) on page 97.

[Viewing Courses for a Trainer](#) on page 98.

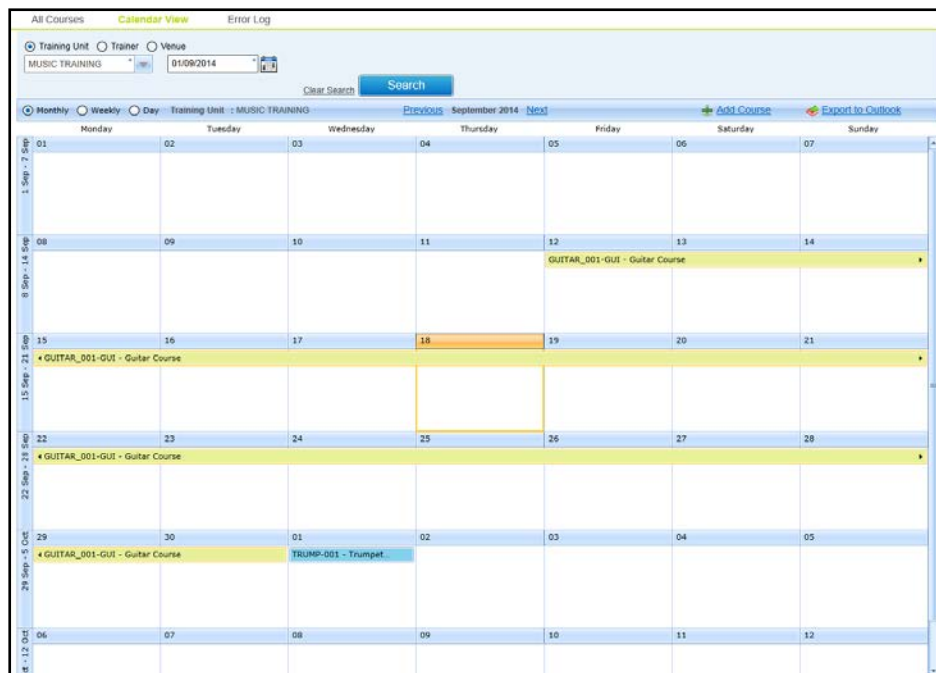
[Viewing Courses for a Venue](#) on page 99.

Viewing Courses for a Training Unit

1. Ensure that the **Training Unit** radio button is selected.
2. Select the required **Training Unit** from the drop-down list.
3. Select the required date.

4. Click the **Search** button to display the **Monthly** planner showing all courses and sessions for the selected training unit and month.

Managing Courses



Courses are colour coded depending on the status:

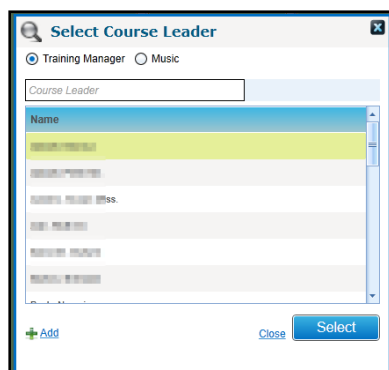
- Green – completed.
- Yellow – in progress.
- Blue – planned.
- Red – cancelled.

5. If required, select the **Weekly** radio button to display the weekly planner or the **Day** radio button to display the daily planner.

NOTE: *Hovering the mouse over an entry in the grid displays a tool tip showing the course details. If sessions have been defined for a course, these are displayed in the grid. Otherwise, the start and end date of the course is displayed.*

Viewing Courses for a Trainer

1. Select the **Trainer** radio button.
2. Click the **Trainer Name** browse button to display the **Select Course Leader** dialog.



- a. Select the **Music** radio button to display a list of music course leaders.
- b. Select the required **Course Leader** and click the **Select** button.
3. Select the required date.

- Click the **Search** button to display the **Monthly** planner showing all courses for the selected trainer and month.

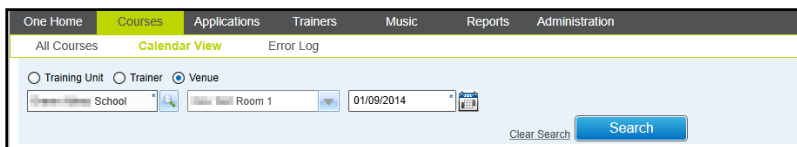
Courses are colour coded depending on the status:

- Green – completed.
- Yellow – in progress.
- Blue – planned.
- Red – cancelled.

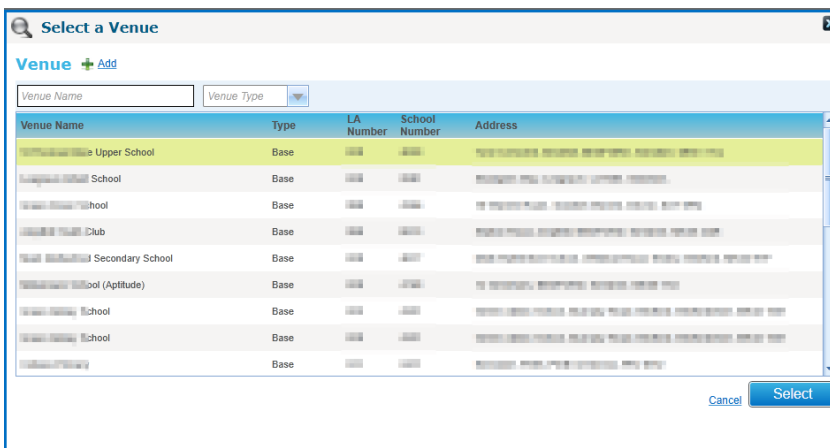
- If required, select the **Weekly** radio button to display the weekly planner or the **Day** radio button to display the daily planner.

Viewing Courses for a Venue

You can search for courses taking place at a venue. If the selected venue has rooms associated with it, courses taking place in a particular room can be displayed.



- Select the **Venue** option.
- Click the **Venue** browse button to display the **Select a Venue** dialog.



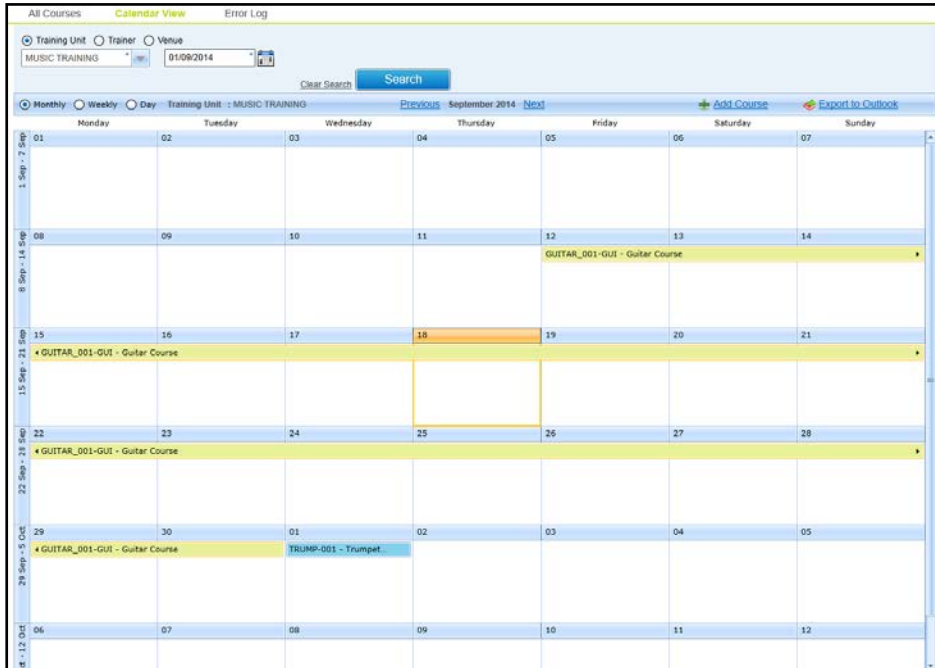
The list can be filtered by entering a full or partial **Venue Name** or selecting a **Venue Type** from the drop-down list.

- Select the required **Venue** and click the **Select** button.
- If required, select a **Room Name** from the drop-down list.
- Select a **Search Date**.
- Click the **Search** button to display the **Monthly** planner showing all courses for the selected venue and month.
- If required, select the **Weekly** radio button to display the weekly planner or the **Day** radio button to display the daily planner.

Exporting a Calendar to Outlook

You can export course information as a calendar (iCalendar file in .ics format), that can be emailed to other users. The exported file can be dragged and dropped onto any Outlook calendar and will populate all course information into the recipient's calendar.

NOTE: The information exported will be a snapshot in time. Information subsequently updated at the course level within One will not be reflected in the previously exported file.



1. Search for courses in calendar view.
For more information, see [Viewing Courses in Calendar View](#) on page 97.
2. Click the **Export to Outlook** button to display a file save dialog.
3. Save the file as an iCalendar file in .ics format.

Adding a New Course in Calendar View

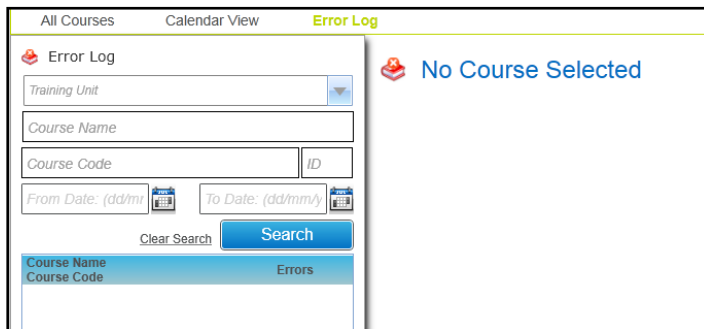
1. Search for courses in calendar view. For more information, see [Viewing Courses in Calendar View](#) on page 97.
2. Click the **Add Course** button to display the **Add New Course** screen.

3. Enter details for the new course and click the **Create Course** button. For more information, see [Entering New Course Details](#) on page 68.

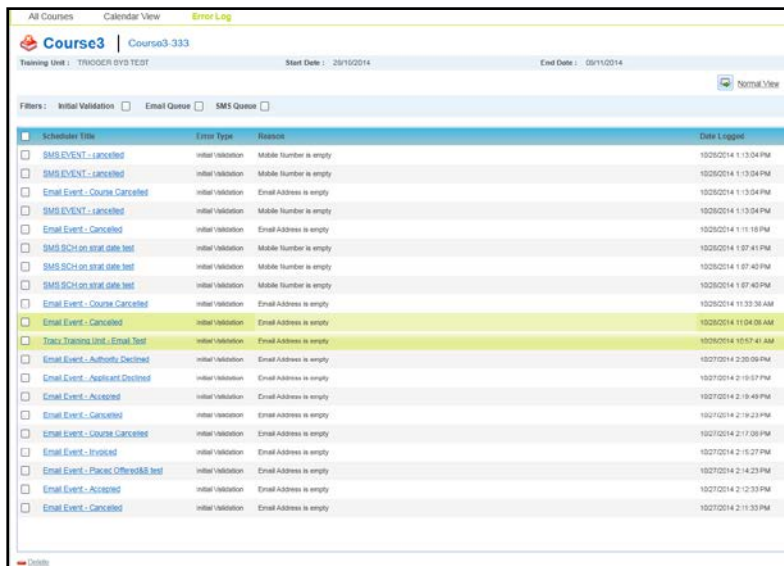
Managing the Courses Error Log

The courses **Error Log** displays errors related to sending scheduled communications, e.g. missing email address or mobile phone number. Errors can be corrected and the communications re-sent .

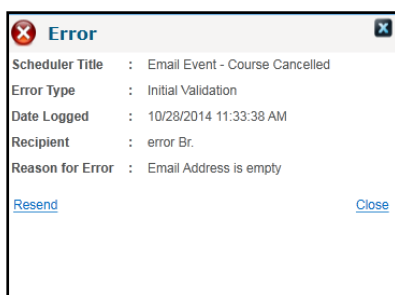
1. Select the **Courses** area.
2. Select the **Error Log** page.



3. Enter your search criteria.
4. Click the **Search** button to display a list of courses with errors.
5. Select a course in the list to display the error log list.



6. Click the hyperlink from the **Scheduler Title** to display the error details.



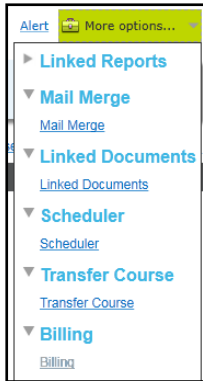
7. Correct the missing data.
8. Click the **Resend** button.

Managing Course Billing

Course billing is enabled when a course has a nominal ledger account associated with it. Transactions associated with the course and its applications are displayed by clicking the **Billing** link accessed via **More Options**.

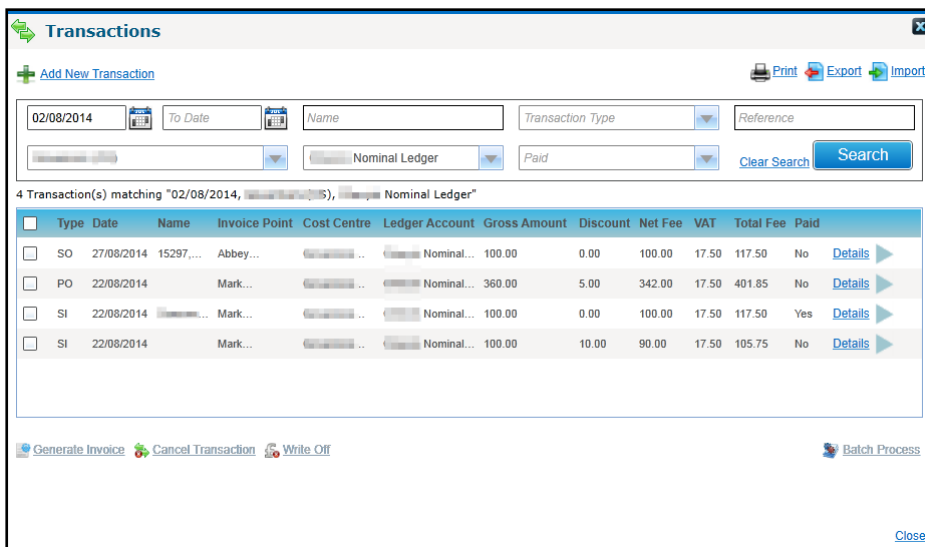
Viewing Transactions for a Course

1. Search for a course using either the **All Courses** or **Calendar View** tab.
2. Select the required course to view the details.
3. Click the **More options** button to display the drop-down list of options.



NOTE: The **Billing** link is only enabled if there is a nominal ledger account associated with the course.

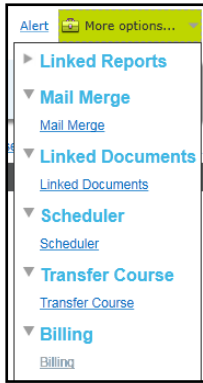
4. Click the **Billing** link to display transactions for this course.



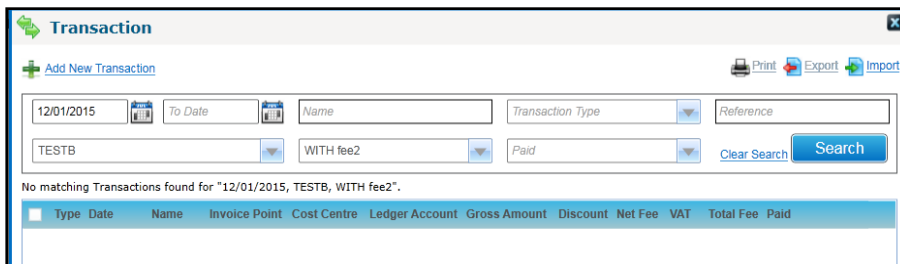
Creating Transactions for a Course

NOTE: A transaction created via the course billing area is linked to the course itself and not to a specific application. In order to create a transaction linked to an application, use the **Linked Transactions** option. For more information, see [Creating Transactions Linked to the Application](#) on page 117.

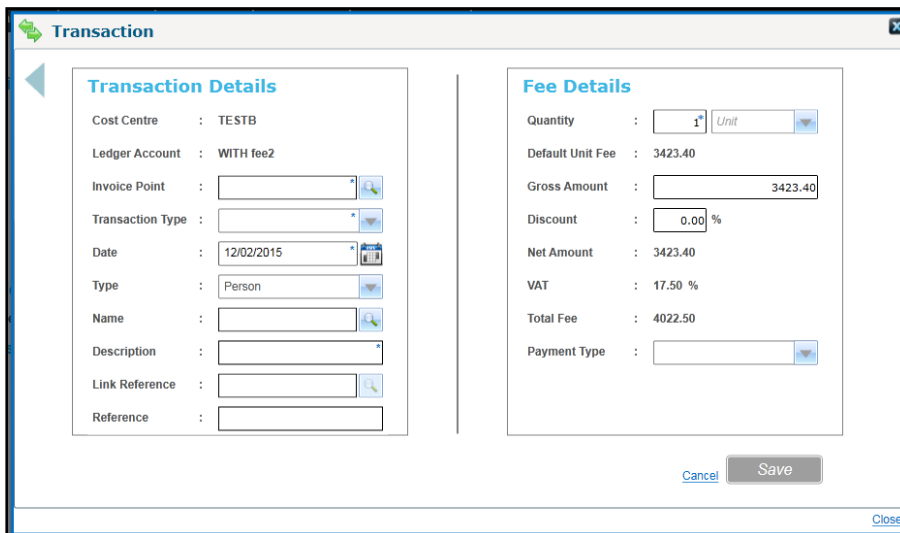
1. Search for a course using either the **All Courses** or **Calendar View** tab.
2. Select the required course to view the details.
3. Click the **More options** button to display the drop-down list of options.



4. Select the **Billing** link to display the **Transaction** dialog.



5. Click the **Add New Transaction** link to display the transaction details.



6. Select an **Invoice Point**.
7. Select a **Transaction Type** from the drop-down.
8. Enter a **Description**.
9. Click the **Save** button.

04 / Managing Applications

Introduction to Managing Applications

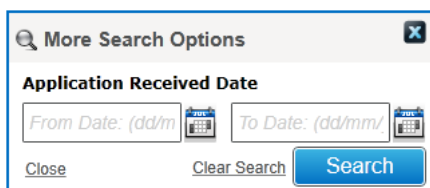
The **Applications** area is where course applications can be viewed and processed.

The **All Applications** tab is used to view and process applications for Music Tuition courses.

Viewing Applications



1. Select the **Applications** area.
2. Ensure the **All Applications** tab is selected.
3. If required, enter search criteria as follows:
 - a. Enter a full or partial **Applicant Name**.
 - b. For applications raised by a base, click the **Base Name** browse button to display the **Base Search** window.
 - c. Click the **Course Name** browse button to display the **Select Course** window.
For more information, see [Selecting a Course](#) on page 107.
 - d. Select an **Application Status** from the drop-down list.
 - e. Click the **More Options** button to display the **More Search Options** panel. Select an **Application Received Date** range and click the **Search** button.



4. Click the **Search** button to display a list of matching applications.

Managing Applications

One Home Courses **Applications** Trainers Music Reports Administration

All Applications Incoming Applications

Applications

Applicant Name

Base Name

Basson lessons

Application Status

More Options Clear Search Search

+ Add New Application

4 Application(s) matching "Basson lessons"

Name	Course	Status
	Basson lessons	Application Received
	Basson lessons	Application Received
	Basson lessons	Application Received
	Basson lessons	Application Received

- Select an application in the list to display the course summary panel and application details tab.

All Applications Incoming Applications

Nics Rock Lesson | Cousins, Betty

Alert More options...

View Course Details View Applicant Details

Course Start Date : 01/10/2016 Places Available : Applicant Phone Number :

Course End Date : 01/11/2016 Places Filled : 0 Applicant Email :

Venue : Amphill Youth Club Minimum Places for Viability : Application Status : Application Received

+ Add Instrument Hire Delete Application Normal View

Application Details Sessions Additional Questions

Application Details UDE Memo

Application Priority: [Dropdown]

Instrument: [Dropdown]

Received Date: 18/10/2016 [Calendar]

Accepted Date: [Calendar]

Declined Date: [Calendar]

Attendance Confirmed:

Email:

To: betty@sky.com

Post: [Text]

Application Status: Application Received [Dropdown]

Offered Date: [Calendar]

Cancelled Date: [Calendar]

Invoice Point: [Text]

Qualification: [Dropdown]

CC: [Text]

NOTE: Application details for a course can also be viewed via the **All Courses | Applicants** area. For more information, see [Managing Course Applicants](#) on page 81.

All Applicants 1 | RESERVED

Add Applicant Add Individual

Alert More options...

View Course Details View Base Details View Applicant Details

Course Start Date : 23/10/2016 Places Available : 10 Applicant Phone Number :

Course End Date : 23/11/2016 Places Filled : 2 Applicant Email :

Venue : Minimum Places for Viability : Application Status : Application Received

Delete Application Normal View

Application Details Additional Questions

Application Details Linked Transactions UDE Memo

Application Priority: [Dropdown]

Subject: [Text]

Received Date: 19/10/2016 [Calendar]

Accepted Date: [Calendar]

Declined Date: [Calendar]

Attendance Confirmed:

Online Application: No

Email:

To: [Text]

Post: [Text]

Application Status: Application Received [Dropdown]

Offered Date: [Calendar]

Cancelled Date: [Calendar]

Invoice Point: Ampthill Youth Club [Text]

Qualification: [Dropdown]

CC: [Text]

Selecting a Base

The screenshot shows the 'Base Search' dialog box. It contains several input fields: 'Base Name', 'School Number', 'Base Types', 'All Bases', 'Not Applicable', 'Clusters', and 'URN'. There are radio buttons for 'Show Active', 'Show Inactive', and 'Show All'. A 'Search' button is present. Below the search fields, it says '0 Bases' and a table with columns: Name, Base Type, LA, School No., Control, Active. The table contains the text 'No results found. Please review your search options.' There are 'Close' and 'Select' buttons at the bottom right.

1. If required enter one or more search criteria:
 - **Base Name**
 - **School Name**
 - **Base Type** (*Table ID: 0070*)
 - **LA Bases, All Bases or None**
 - **Key Stage**
 - **Cluster**
 - **URN**
2. Click the **Search** button to display a list of matching bases.

The screenshot shows the 'Base Search' dialog box with search criteria filled in: 'ba' in Base Name, '44' in School Number, 'All Bases' in All Bases, 'All Key Stages' in Not Applicable, and 'Show Active' selected. The 'Search' button is highlighted. Below, it says '1 Bases' and a table with columns: Name, Base Type, LA, School No., Control, Active. The table has one row: 'Base: [redacted]', 'Middle School', '[redacted]', '44', 'Yes'. There are 'Close' and 'Select' buttons at the bottom right.

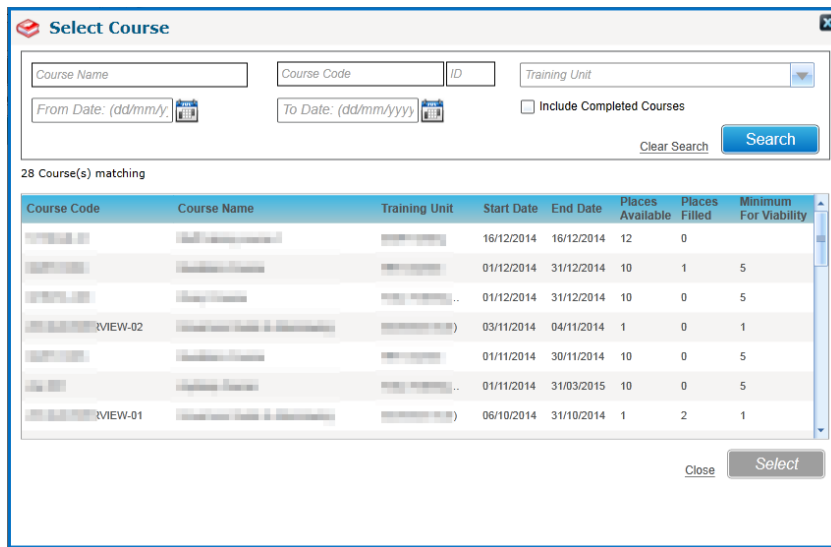
3. Select the required base and click the **Select** button.

Selecting a Course

1. If required, enter one or more search criteria:
 - **Course Name**
 - **Course Code**
 - **Training Unit**
 - **From Date**
 - **To Date**

- **Include Completed Courses** check box

- Click the **Search** button to list matching courses.



- Select the required course and click the **Select** button.

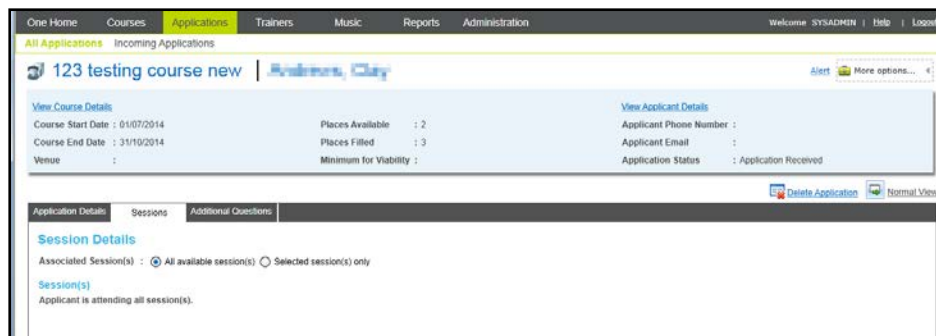
Viewing Sessions for an Application

- Open the required application.

For more information, see [Viewing Applications](#) on page 105.

- Select the **Sessions** tab to view the sessions for this application.

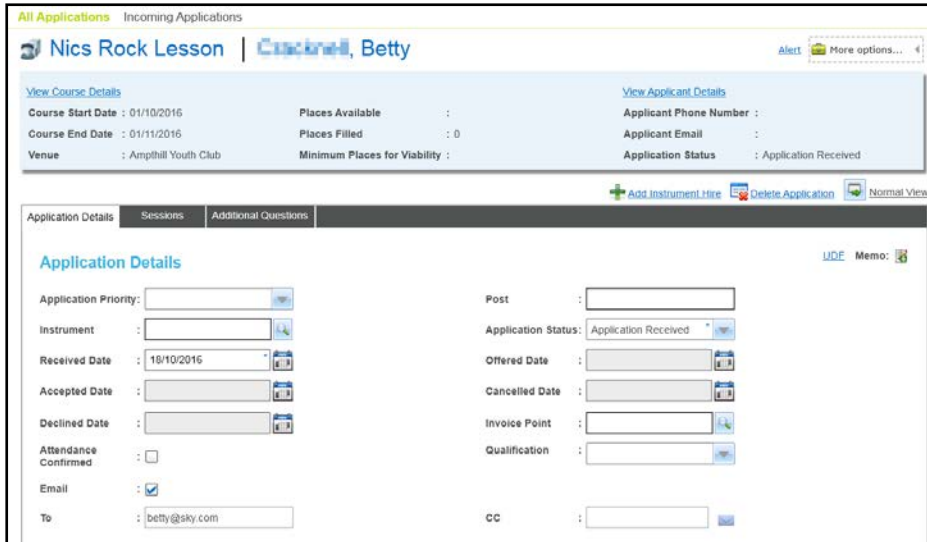
The **Session Details** panel displays **Associated Session(s)**, which is either **All available sessions** or **Selected session(s) only**:



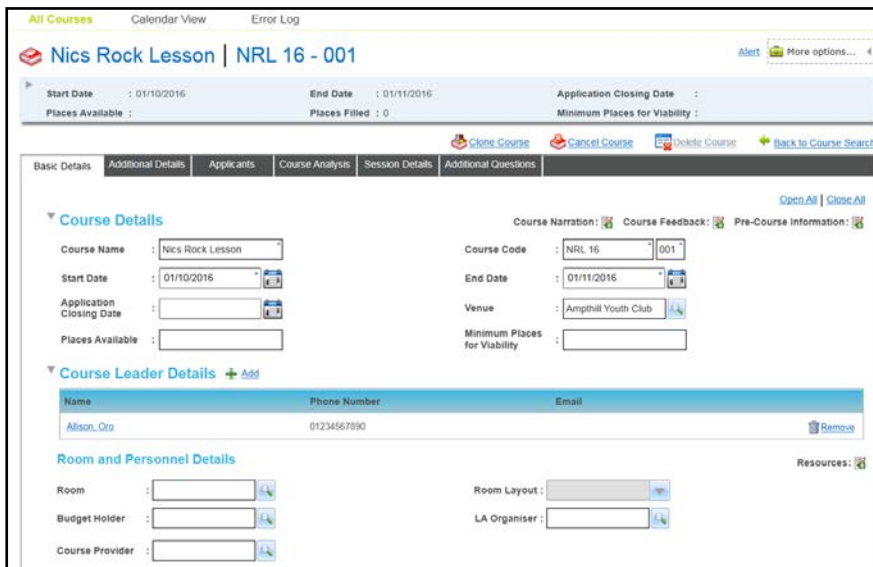
Viewing Course Details for an Application

- Open the required application.

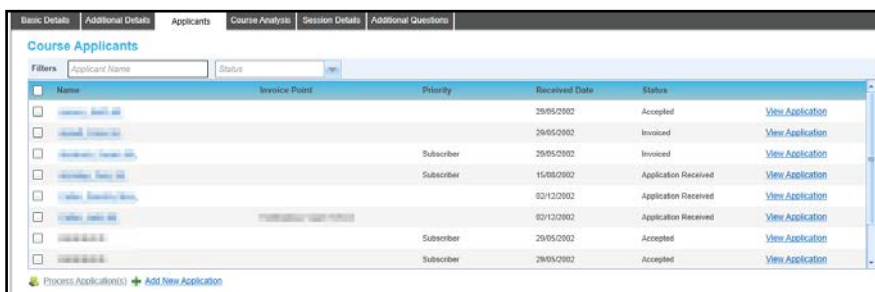
For more information, see [Viewing Applications](#) on page 105.



2. In the course summary panel, click the **View Course Details** button to display the course details.



3. To return to the application:
 - a. Select the **Applicants** tab to display the **Course Applicants**.



- b. Click the **View Application** button.

Viewing Applicant Details

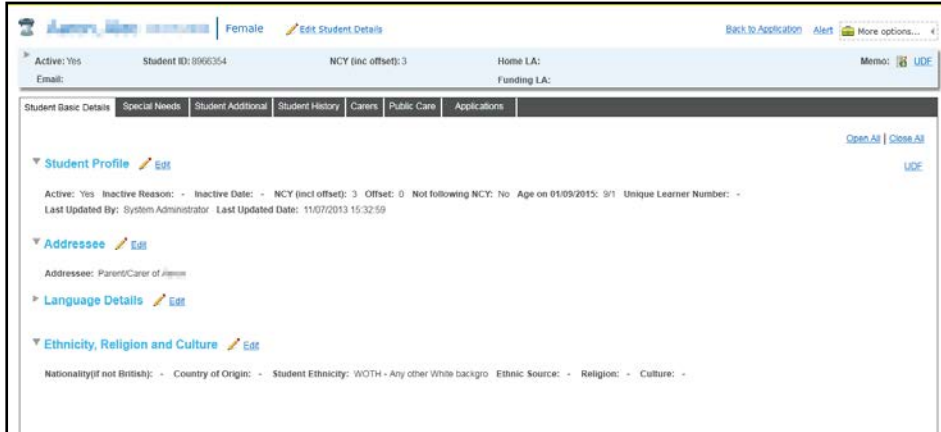
1. Open the required application.
For more information, see [Viewing Applications](#) on page 105.

Managing Applications

- In the course summary panel, click the **View Applicant Details** button to display the applicant details. The applicant can be a person, student or individual. The view of applicant details will depend on the type of applicant.

Viewing Applicant Details for a Student

If the applicant is a student, clicking the **View Applicant Details** button displays their student details.



While viewing the student details, you can:

- Click the **Edit Student Details** button to edit the applicant summary details.
- Click the **Edit** button on the individual panels to edit these details.
- Click the **Back to Application** button to return to the application details.

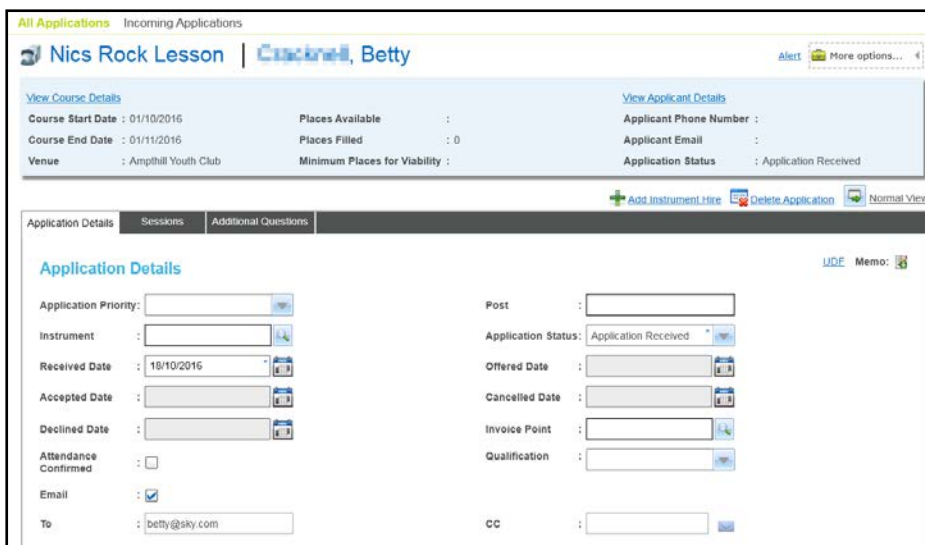
More Information:

[Editing Applicant Details \(Student\)](#) on page 114
[Viewing Applications](#) on page 105.

Viewing Transactions Linked to the Application

You can view transactions linked to a specific application.

NOTE: The **Linked Transactions** link is only displayed if the application has an associated invoice point and is for a course that is linked to a ledger account with a default fee greater than zero.



Click the **Linked Transactions** link to display the **Transactions** dialog displaying transactions for this application.

Editing an Application

Open the required application.

For more information, see [Viewing Applications](#) on page 105.

Editing Application Details

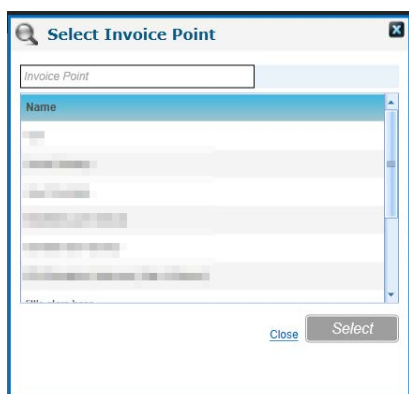
1. Select an **Application Priority** from the drop-down list.

NOTE: Application Priority is pre-populated if a priority has already been defined for the associated base from which the application has been received or if the base selected as an Invoice Point has a priority assigned to it.

2. Enter a **Post**.
3. Click the **Instrument** browse button to display the **Select Instrument** dialog.

4. Select the required instrument type and click the **Select** button.
5. Select an **Application Status** from the drop-down list.
6. If required, select a different date for the **Application Status**.
7. Click the **Invoice Point** browse button to display the **Select Invoice Point** window.

Managing Applications



8. Select the required **Invoice Point** and click the **Select** button.
9. If required, select the **Email** check box and enter a **To** and **CC** email address.
10. Click the **Save** button.

Creating a Sales Order Transaction Linked to the Application

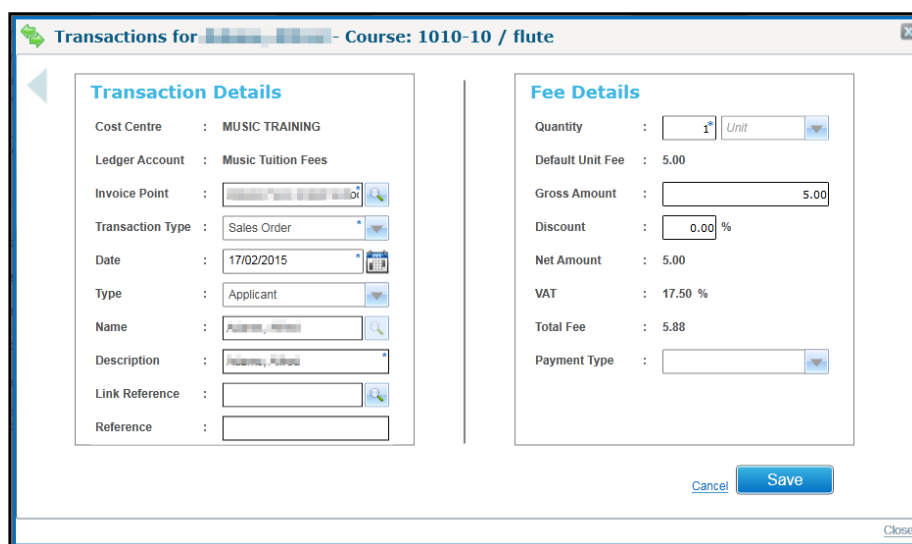
When you save changes to an application, you can create a pre-populated sales order transaction linked to the application, if the following conditions apply:

- The application status is either **Accepted** or **Invoiced**.
- There is an invoice point specified and the course is linked to ledger account with a default fee greater than zero.
- No transactions are currently linked to the application.
- You have permission to create transactions.

If the following message is displayed when you save an application you can create a sales order transaction linked to the application:

Do you want to create a Sales Order transaction for this application?

1. If the previous message is displayed, click the **Yes** button to display the **Transaction Details** screen with the details of the sales order transaction completed.



2. Click the **Save** button.

NOTE: Only one transaction is created for an application. If multiple transactions are required, e.g. to represent partial payments, the additional transactions must be manually created.

Adding Sessions to an Application

If the current application is for selected sessions only, you can update it to include all available sessions or add individual sessions.

NOTE: When a new applicant is put onto a multi-session course they are automatically put onto all sessions.

1. Open the sessions for the required application.

For more information, see [Viewing Sessions for an Application](#) on page 108.

If the **Selected session(s) only** radio button is selected, additional sessions can be added.

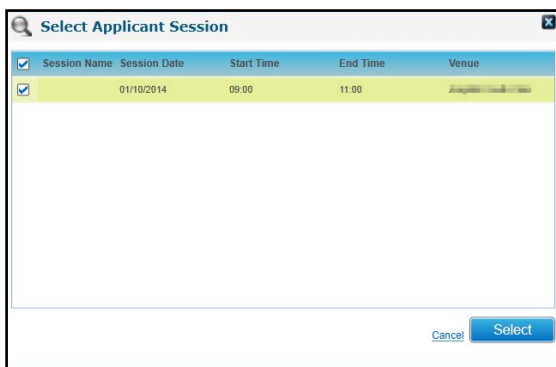
2. To include all available sessions:
 - a. Select the **All available sessions** radio button.



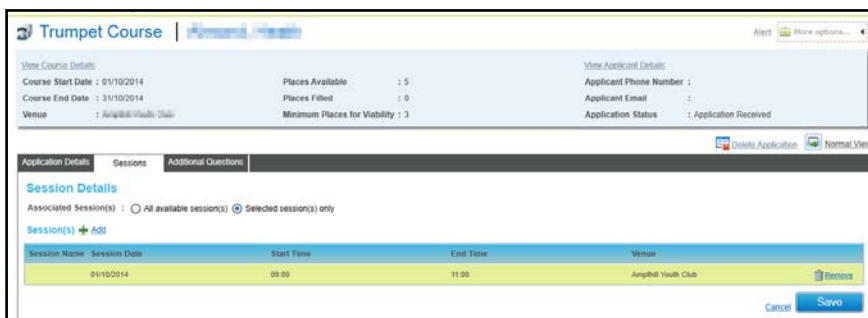
- b. Click the **Save** button.

3. To add individual sessions to the application:

- a. Click the **Add** button to display all available sessions on the **Select Applicant Session** window:



- b. Select the required session and click the **Select** button.



4. Click the **Save** button.

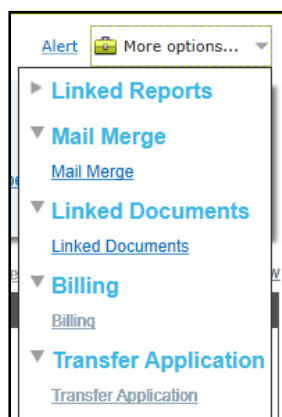
Transferring an Application

You can transfer an application to a different course if the applicant has not yet attended the course.

1. Open the required application.

For more information, see [Viewing Applications](#) on page 105.

2. Click the **More options** button to display the drop-down list of options.



3. Select the **Transfer Application** link to display the **Transfer Application** window:

4. Click the **Course** browse button to display the **Select Course** dialog and select a new course for this application.

NOTE: Only courses which are planned or in progress are displayed on the **Select Course** dialog screen.

For more information, see [Selecting a Course](#) on page 107.

5. If required, select the **Use Existing Application Status** check box to copy the dates when the existing application changed its status, to the new course.
6. Alternatively, select new dates for **Application Received Date**, **Offer Date** and **Acceptance Date**.
7. Click the **Process** button.

NOTE: You can also transfer an applicant to a different course via the **Courses | All Courses** menu route.

Editing Applicant Details (Student)

If the applicant is a student, the summary details and student details of the applicant can be edited.

Editing Applicant Summary Details

1. Open the applicant details.

The screenshot shows the 'Edit Student Details' page for a female student. At the top, there are navigation links for 'Back to Application', 'Alert', and 'More options...'. Below this, a summary bar displays: 'Active: Yes', 'Student ID: 8966354', 'NCY (inc offset): 3', 'Home LA:', and 'Memo: UDE'. A tabbed interface below the summary bar includes 'Student Basic Details', 'Special Needs', 'Student Additional', 'Student History', 'Careers', 'Public Care', and 'Applications'. The 'Student Basic Details' tab is active, showing expandable sections for 'Student Profile', 'Addressee', 'Language Details', and 'Ethnicity, Religion and Culture'. Each section has an 'Edit' button. The 'Student Profile' section shows details like 'Active: Yes', 'Inactive Reason: -', 'Inactive Date: -', 'NCY (incl offset): 3', 'Offset: 0', 'Not following NCY: No', 'Age on 01/09/2015: 9/1', and 'Unique Learner Number: -'. The 'Addressee' section shows 'Addressee: Parent/Carer of student'. The 'Language Details' and 'Ethnicity, Religion and Culture' sections show various dropdown menus for selection.

For more information, see [Viewing Applicant Details](#) on page 109.

2. Click the **Edit Student Details** button to display the applicant summary details in edit mode.

The screenshot shows the 'Edit Student Details' page in edit mode. At the top, there are dropdown menus for 'StudentID4', '15297', and 'Male'. Below this, a summary bar displays: 'Active: Yes', 'Student ID: 9054499', 'NCY (inc offset): 5', 'Home LA: W20-Bedfordshire 97', and 'Memo: UDE'. Below the summary bar, there are input fields for 'Email', 'Middle Name', 'Current Age: 10/9', 'UPN', 'Registered base: Lower School', 'Local UPN', and 'Address'. There are also dropdown menus for 'StudentID4', '15297', 'NCY Offset: 0', 'SEN Status', and 'Public Care: No'. At the bottom right, there are 'Cancel' and 'Save' buttons.

3. If required, edit the **Forename, Surname, Date of Birth, Gender, Email, Home LA, Funding LA, Middle Name, Chosen Forename, Chosen Surname, UPN or Local UPN.**
4. Click the **Save** button.

Editing Student Basic Details

The **Student Basic Details** page consists of **Student Profile, Language Details and Ethnicity, Religion and Culture.**

To edit details on one of the panels:

1. Click the **Edit** button to display the panel in edit mode.
2. Update the information as required.
3. Click the **Save** button.

Editing Student's Special Needs

The **Special Needs** tab page consists of **Disability Details and SEN Stage Details.**

The screenshot shows the 'Special Needs' tab page. At the top, there are navigation links for 'Student Basic Details', 'Special Needs', 'Student Additional', 'Student History', 'Careers', 'Public Care', and 'Applications'. The 'Special Needs' tab is active, showing expandable sections for 'Disability Details' and 'SEN Stage Details'. The 'Disability Details' section has an 'Edit' button and contains the following text: 'Is the person disabled? No', 'Is the person on the disability register? No', 'No Disabilities Recorded', and '+Add Disabilities'. The 'SEN Stage Details' section contains the text: 'No records found for SEN Stage Details'. At the top right of the page, there are 'Open All' and 'Close All' links.

You can edit the **Disability Details** as follows:

1. Click the **Edit** button to display the panel in edit mode.

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The screenshot shows the 'Disability Details' panel with the following fields:

- Is the person disabled?
- Is the person on the disability register?
- No Disabilities Recorded
- + Add Disabilities

Buttons: Cancel, Save

2. If required, select the **Is the person disabled?** check box.
3. If required, select the **Is the person on the disability register?** check box.
4. If required, click the **Add Disabilities** button to record a disability.

Editing Student Additional Details

The **Student Additional** tab page consists of **Supporting Details**, **Traveller Family** and **Asylum Details**.

The screenshot shows three panels in the 'Student Additional' tab:

- Supporting Details**: Social Services: No, Care Order: No, Student Carer: No, PEP: No, Service Family: No, FSM Eligibility: No, G&B FSM Eligibility: No, Gifted and Talented: No, Mode of Travel: -, SEN Status: -, SEN Status Start Date: -, Youth Support Services Agreement Indicator: -
- Traveller Family**
- Asylum Details**: Asylum Seeker: No, Asylum Status: -

Buttons: Edit, Save

To edit the details on one of the panels:

1. Click the **Edit** button to display the panel in edit mode.
2. Update the information as required.
3. Click the **Save** button.

Editing Student History

The **Student History** tab page consists of **School History**, **Address History** and **Name History**.

The screenshot shows the 'Student History' tab with three panels:

- School History**: Table with columns: Base Name, LA No, Sch No, Reg Type, DPW, Registered, Guest, Residential, Start Date, End Date. Row: [Redacted], 010, MFS, Yes, No, No, 28/04/2014. Buttons: Delete, View & Edit full details.
- Address History**: Table with columns: Address, Start Date, End Date, Correspondence, Address Type, Last Updated By, Last Updated Date, Memo. Row: [Redacted], 28/04/2014, [Redacted], Yes, Home Address, ANTUSER2, 28/04/2014 07:07:04. Buttons: Delete.
- Name History**: Table with columns: Title, Surname, Forename, Chosen Surname, Chosen Forename, Middle Name, Date Of Change. Row 1: [Redacted], [Redacted], [Redacted], [Redacted], [Redacted], [Redacted], 30/10/2014. Row 2: [Redacted], [Redacted], [Redacted], [Redacted], [Redacted], [Redacted], 28/04/2014.

On the **School History** panel, you can:

- Click the **Add** button to add a new school history record.
- Click the **View & Edit full details** button to view and edit a school history record.

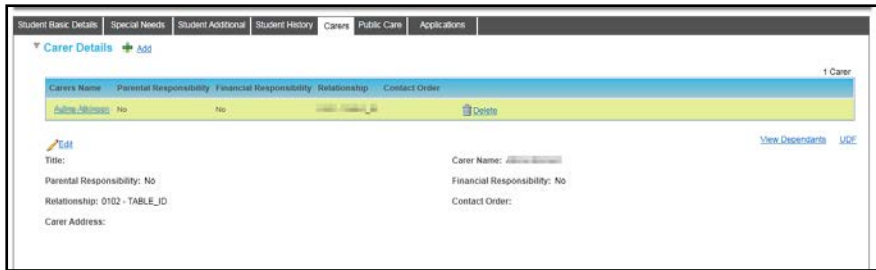
On the **Address History** panel, you can;

- Click the **Add** button to add a new address history record.

- Click the **Delete** button to delete an address history record.

Editing Carers

The **Carers** tab page enables you to edit **Carer Details** for the student.



Editing Public Care Details

The **Public Care Details** tab page enables you to edit **Public Care Details** for the student.



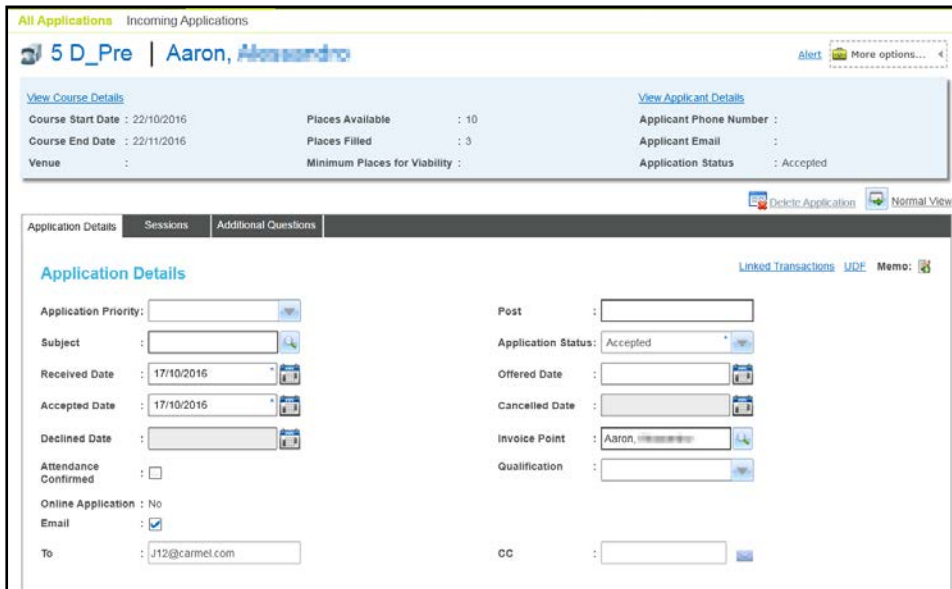
Creating Transactions Linked to the Application

You can create new transactions linked to a specific application.

NOTE: The **Linked Transactions** link is only displayed if the application has an associated invoice point and is for a course that is linked to a ledger account with a default fee greater than zero.

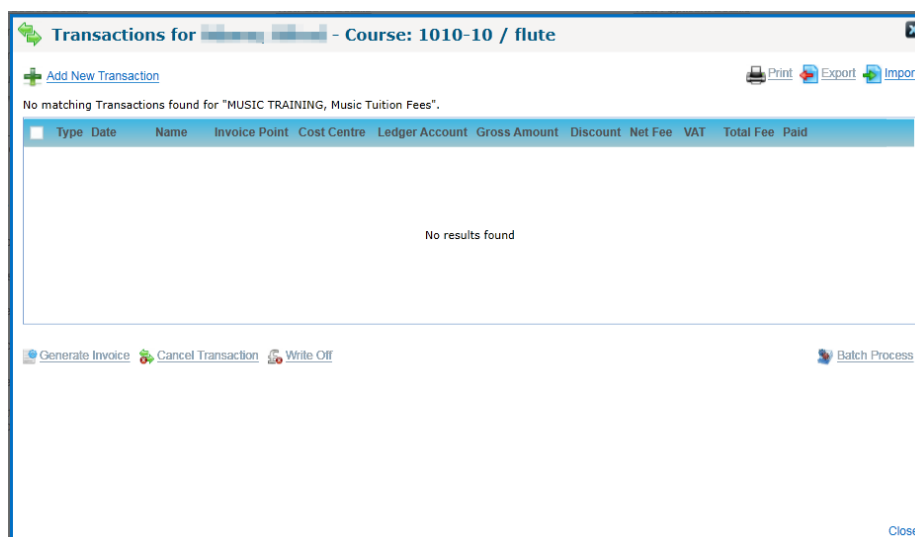
- Open the required application.

For more information, see [Viewing Applications](#) on page 105.

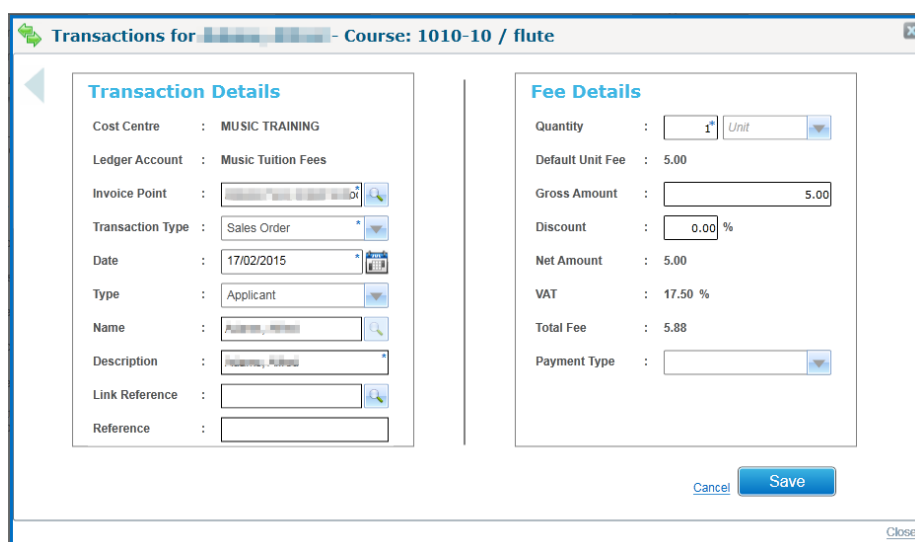


- Click the **Linked Transactions** link to display the **Transactions** dialog displaying transactions for this application.

Managing Applications



3. Click the **Add New Transaction** link to display the **Transactions Details**.

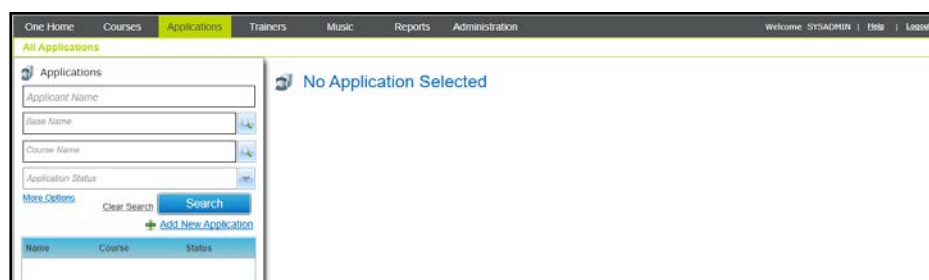


4. Enter the required details and click the **Save** button.

Adding an Application

A new application can be added from the **Applications** search panel. You can add multiple applications by selecting multiple students. For more information, see [Selecting an Applicant \(Student\)](#) on page 120.

1. Select the **Applications** area.
2. Ensure the **All Applications** tab is selected.



3. Click the **Add New Application** button to display the **Add New Application** screen.

- Click the **Course** browse button to display the **Select Course** window.
For more information, see [Selecting a Course](#) on page 107.

NOTE: For music courses, the **Applicant Name** drop-down displays **Student** and the **Add New Student** button is enabled. To record an adult applicant from the One database of people, select an applicant type of **Person** from the drop-down list.

- Select an **Applicant Name**.
For more information on selecting a student, see [Selecting an Applicant \(Student\)](#) on page 120.
For more information on selecting a person, see [Selecting an Applicant](#) on page 122.
- Enter **Application Details**. See [Entering Application Details](#) on page 119.
- Click the **Create Application** button.

NOTE:
You can add instrument hire details if required. For more information, see [Maintaining Instrument Hire and Repair](#) on page 158.

Entering Application Details

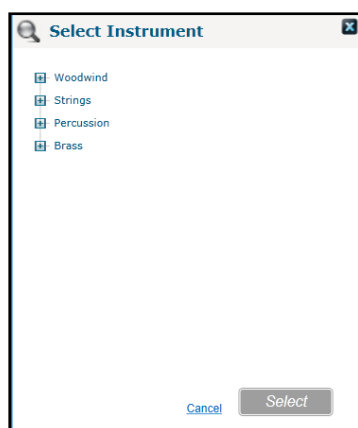
Application Details can be entered as follows:

- Select an **Application Priority** from the drop-down list.

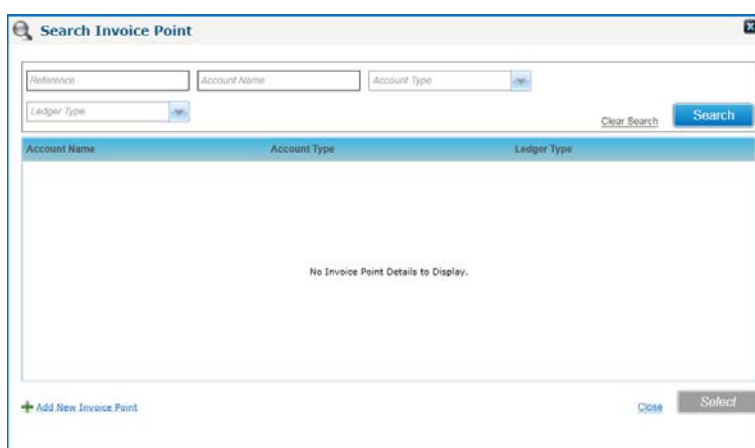
NOTE: Application Priority is pre-populated if a priority has already been defined for the associated base from which the application has been received or if the base selected as an Invoice Point has a priority assigned to it.

- Enter a **Post**.
- Click the **Instrument** browse button to display the **Select Instrument** dialog.

Managing Applications



4. Select the required instrument type and click the **Select** button.
5. Select an **Application Status** from the drop-down list.
6. Select the required date for the **Application Status (Received, Offered, Accepted, Cancelled or Declined)**.
7. Click the **Invoice Point** browse button to display the **Search Invoice Point** window.



8. Enter the required search criteria and click the **Search** button.
If the required invoice point is not listed, it can be added.
Click the **Add Invoice Point** button to display the **Add New Invoice Point** screen. For more information, see [Adding an Invoice Point](#) on page 37.
9. **Select the required Invoice Point** and click the **Select** button.
10. If required, select the **Email** check box and enter a **To** email address and a **CC** email address. These email addresses can then be used to send course information.

More information:

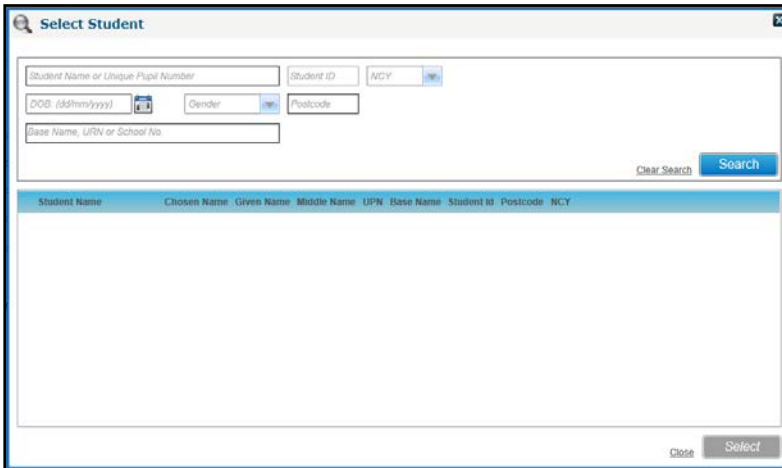
- [Selecting an Applicant](#) on page 122.
- [Selecting an Applicant \(Student\)](#) on page 120.
- [Adding a New Student](#) on page 122.
- [Creating Transactions Linked to the Application](#) on page 117
- [Scheduling Email Options](#) on page 54.

Selecting an Applicant (Student)

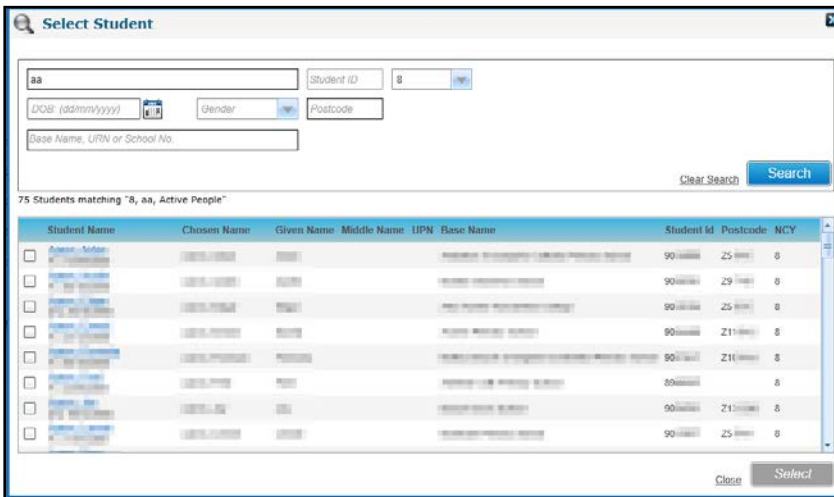
If the applicant is a student with an existing record on the One database you can select the applicant as follows:

1. Select **Student** from the **Applicant Name** drop-down list.

- Click the browse button to display the **Select Student** dialog.

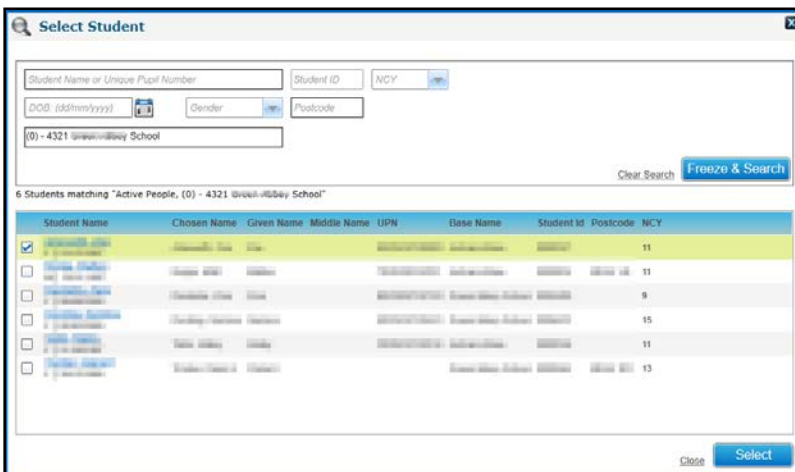


- Enter your search criteria.
- Click the **Search** button to display a list of matching students.



- Select the required student.

NOTE: After you have selected a student, the button changes to display **Freeze & Search** enabling you to search for another student while keeping the existing student selected.



- Click the **Select** button.

Adding a New Student

A new student can be added for the application.

1. Enter the **Forename**, **Surname**, **DOB** and **Gender**.
2. If required, complete the remaining student details.
3. Click the **Save** button.

If a student exists on the One database with matching **Name**, **Gender** and **Date of Birth**, the **Existing Students** dialog is displayed.

Name	Gender	Date Of Birth	NCY	Active	Inactive Reason	Address
[Redacted]	Male	04/09/1994	15	Yes	-	-

Click the **Save** button to save the new student.

Selecting an Applicant

If the applicant is an existing person from the One database, they are selected using the Person Search.

Selecting a Person

Click the **Applicant Name** browse button to select an applicant from the Person Details table.

For more information, see [Selecting a Person using Person Search](#) on page 32.

NOTE: If the applicant is an employee associated with only one current or future service record and the base is an existing invoice point, that base is assigned as the invoice point for the employee. If the base is not an existing invoice point, a confirmation message is displayed and, if confirmed, an invoice point is created for the base and assigned to the application. This occurs when the course is associated with a Nominal Ledger account with a default fee greater than zero.
If the applicant is a governor, the governing body is assigned as the invoice point.

Deleting an Application

An application can only be deleted if it has not been accepted, i.e. **Application Status** is not **Accepted** or **Invoiced**.

1. Open the required application.

For more information, see [Viewing Applications](#) on page 105.

The screenshot shows a web application interface for managing applications. At the top, it displays 'All Applications' and 'Incoming Applications'. The main header identifies the course as 'Nics Rock Lesson' and the applicant as 'Betty'. Below this, there are two columns of information: 'View Course Details' and 'View Applicant Details'. The course details include start and end dates (01/10/2016 and 01/11/2016), venue (Amphihill Youth Club), and availability (0 places filled). The applicant details include phone number, email, and application status (Application Received). A navigation bar contains 'Add Instrument Hire', 'Delete Application', and 'Normal View' buttons. The 'Application Details' section is active, showing various fields for priority, instrument, dates (received, accepted, declined, offered, cancelled), attendance confirmation, email, and contact information (to: betty@sky.com, cc:). The 'Delete Application' button is highlighted in red.

2. Click the **Delete Application** button to display a confirmation message.
3. Click the **Yes** button.

05 / Managing Trainers

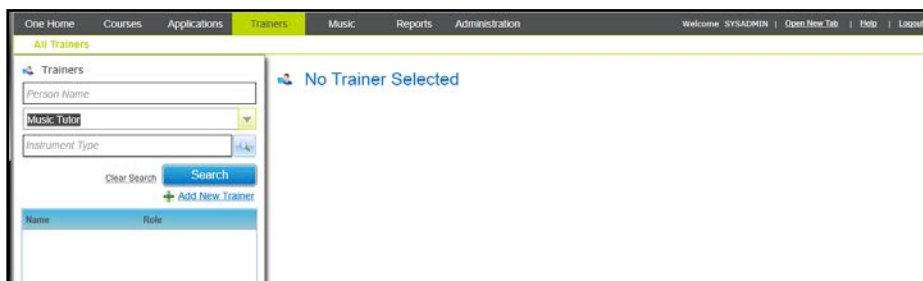
Introduction to Managing Trainers

The **Trainers** area maintains details of music tutors.

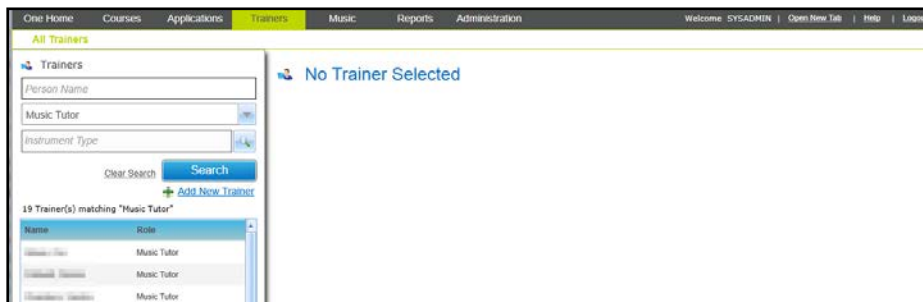
The **Trainers** search panel is displayed on the **All Trainers** page when you select the **Trainers** area. It is used to search for a music tutor to view or update the details.

Viewing Music Tutors

1. Select the **Trainers** area to display the **All Trainers** page.
2. If required, enter a full or partial **Person Name**.
3. Ensure that **Music Tutor** is selected from the **Role** drop-down.



4. If required, click the **Instrument Type** browse button to select an instrument.
For more information, see [Selecting an Instrument](#) on page 145
5. Click the **Search** button to display a list of matching music tutors.



6. Select the required **Name** in the list to display the trainer details.

Editing Trainer Basic Details

Search for the required trainer to view the person basic details.

For more information, see [Viewing Music Tutors](#) on page 125.

Editing Person and Ethnic Details

1. Ensure that the **Basic Details** tab is selected.
2. Click the **Edit** button on the **Person and Ethnic Details** panel to display the panel in edit mode.

3. Edit the following details as required:
 - **Ethnic Origin** (lookup table ID: 0695)
 - **Home Language** (lookup table ID: 002)
 - **Reference**
 - **Asylum Seeker**
 - **NI Number**
4. Click the **Save** button.

Editing Contact Details

1. Click the **Edit** button on the **Contact Details** panel to display the panel in edit mode.

2. Edit the details as required.
3. Click the **Save** button.

Editing Impairment Details

1. Click the **Edit** button on the **Impairments** panel to display the panel in edit mode.

The screenshot shows the 'Impairments' form with the following elements:

- Registered Disabled: Disability Number:
- Day to Day Impairment:
- View Current Disabilities Only:
- No Disabilities Recorded
- + Add Disabilities
- Buttons: Cancel, Save

2. Edit the details as required.
3. If required, add a disability:
 - a. Click the **Add Disabilities** button to display additional fields:

The screenshot shows the 'Impairments' form with the following elements:

- Registered Disabled: Disability Number:
- Day to Day Impairment:
- View Current Disabilities Only:
- No Disabilities Recorded
- + Add Disabilities
- Disability Description:
- Start Date:
- End Date:
- Primary Disability:
- Buttons: Cancel, Save

- b. Select a **Disability Description** from the drop-down list (*Lookup table ID: 0030*).
 - c. Select a **Start Date** for the disability.
 - d. If required, select an **End Date**.
 - e. Select or deselect the **Primary Disability** check box.
4. Click the **Save** button.

The screenshot shows the 'Impairments' form with a table containing one row of data. The table has the following columns: Disability Description, Start Date, End Date, and Primary Disability. The row contains the following data: 0030 - TABLE_ID, 01/05/2014, No, and No. There are also 'Delete' and 'Edit' buttons next to the row.

Disability Description	Start Date	End Date	Primary Disability
0030 - TABLE_ID	01/05/2014	No	No

Managing the Trainer's Courses

Courses conducted by this trainer can be viewed. If a trainer is no longer available, the selected course can be assigned to another trainer.

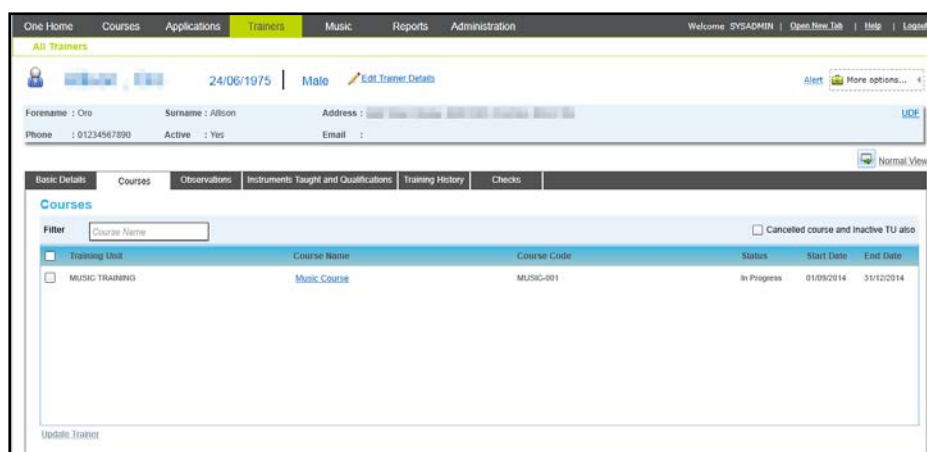
Viewing the Trainer's Courses

Search for the required music tutor to view the details.

For more information, see [Viewing Music Tutors](#) on page 125.

1. Select the **Courses** tab to display the courses conducted by this trainer.

Managing Trainers

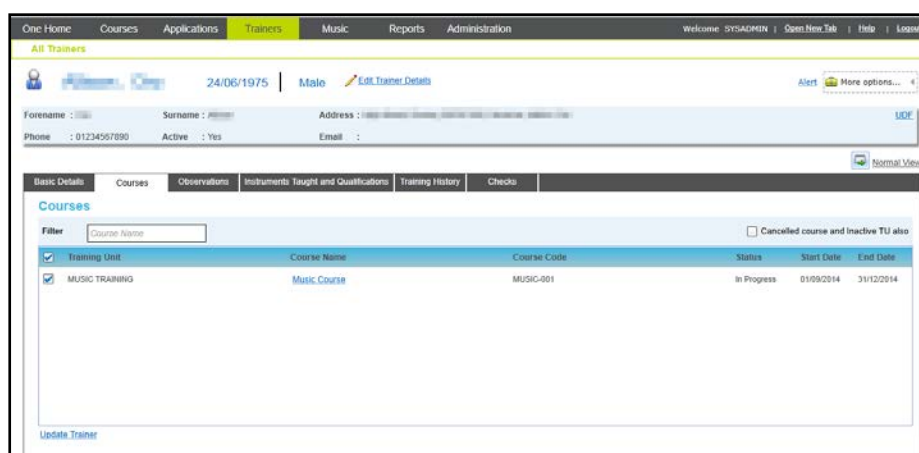


2. To filter the list, enter a full or partial **Course Name**.
3. To view inactive or cancelled courses, select the **Cancelled and Inactive courses also** check box.

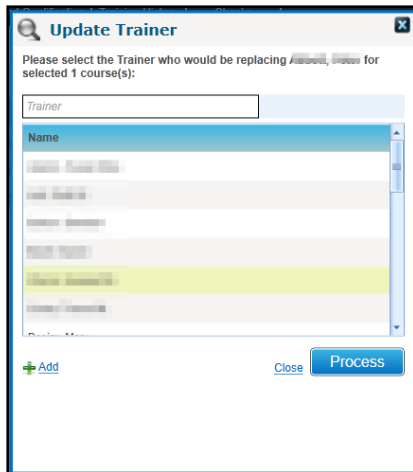
Assigning a Course to a Different Trainer

If the selected trainer is no longer conducting one of the listed courses, it can be assigned to a different trainer.

1. Open the list of courses for the current trainer.
For more information, see [Viewing Music Tutors](#) on page 125.
2. Select the check boxes for the courses you want to transfer to a different trainer.



3. Click the **Update Trainer** button to display the **Update Trainer** window.



4. Select the required **Name** from the list of trainers.
If the required trainer is not listed it can be added. Click the **Add** button to display the **Person Search**. For more information, see [Selecting a Person using Person Search](#) on page 32.
5. Click the **Process** button to display a confirmation message.
6. Click the **Yes** button to replace the original trainer on the selected course with the new trainer.

Managing Observations

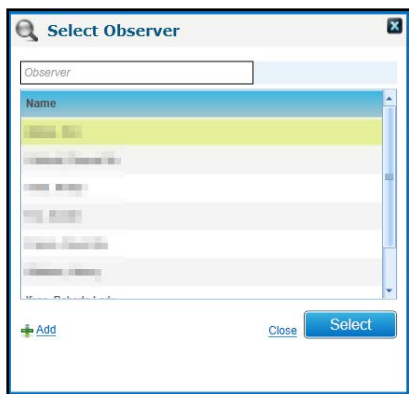
Observations can be recorded for the selected trainer. You can view the recorded observations and add new ones via the **Observations** tab.

Adding Observations

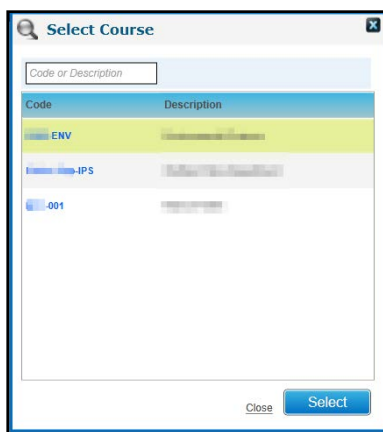
1. Display the list of observations for the trainer.
For more information, see [Viewing Music Tutors](#) on page 125.
2. Click the **Add** button to display the **Observations** panel in add mode.

3. Click the **Observer** browse button to display the **Select Observer** window.

Managing Trainers



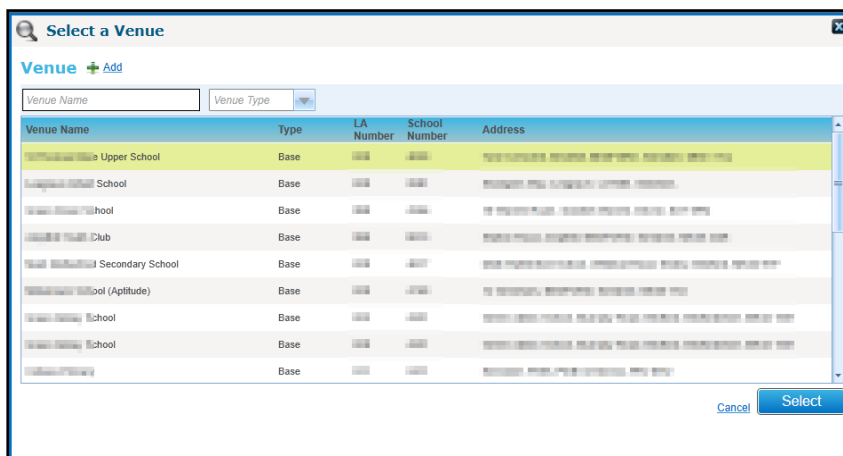
- a. Select an **Observer** from the list of people assigned the role of Observer. The list is maintained via **Administration | People Roles**.
 - b. Click the **Select** button.
4. Select an **Observation Type** from the drop-down list (*lookup table ID 0578*).
 5. Click the **Course** browse button to display the **Select a Course** window.



- a. Select the required course
- b. Click the **Select** button.

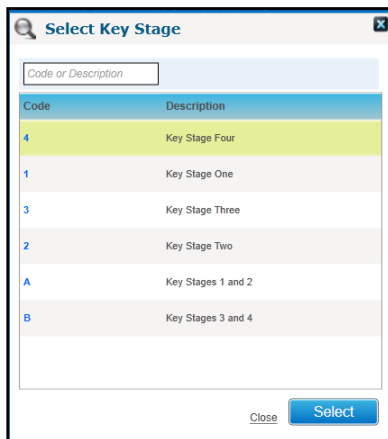
The **Venue** is automatically filled when the **Course** is selected.

6. If required, select a different venue:
 - a. Click the **Venue** browse button to display the **Select Venue** window:

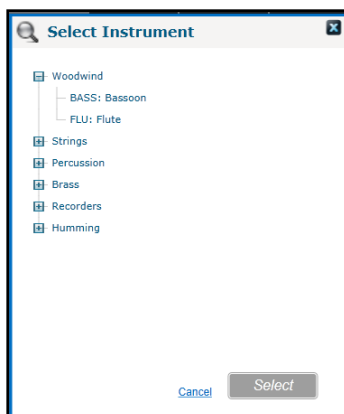


- b. Select the required **Venue**.

- c. Click the **Select** button.
7. If required, select a **Session Name** (this populates the **Date** and **Time** automatically), the **Date**, **Time** and **Students Present**.
8. If required, select a **Key Stage**:
 - a. Click the **Key Stage** browse button to display the **Select Key Stage** window.



- b. Select the required key stage **Code**.
- c. Click the **Select** button.
9. If required, select a **Instrument**:
 - a. Click the **Instrument** browse button to display the **Select Instrument** window.



- b. Select the required instrument type.
- c. Click the **Select** button.
10. If required, enter an **NCY Group** and an **NQF Level** selected from the drop-down.
11. **Enter Assessment** details.
12. Click the **Save** button.

Viewing Observations

1. Search for the required music tutor to view the details.
For more information, see [Viewing Music Tutors](#) on page 125.
2. Select the **Observations** tab to display observations recorded for this trainer.

Managing Instruments Taught and Qualifications

The instruments taught by the selected music tutor and qualifications held can be viewed and updated via the **Instruments Taught and Qualification** tab.

Adding New Instruments Taught

1. Search for the required music tutor to view the details.
For more information, see [Viewing Music Tutors](#) on page 125.
2. Select the **Instruments Taught and Qualification** tab.
3. Click the **Add** button to display the **Instruments Taught** panel in add mode.

4. Click the Instrument browse button to select an instrument.

5. Select the required instrument type and click the **Select** button.
For music tutors, an **NQF Level** can be selected from the drop-down list.
6. If required, select a **Grade** from the drop-down list.

- Click the **Save** button.

Editing Instruments Taught

- Search for the required music tutor to view the details.
For more information, see [Viewing Music Tutors](#) on page 125.
- Select the **Instruments Taught and Qualification** tab.

Instrument(s)	NQF Level	Grade	Memo
Clarinet	NQF Level 2	6	
Harp		6	
Oboe		4	

- On the **Instruments Taught** panel, click the **Edit** button.

- If required, click the browse button to display the **Select Instrument** window.

- Select the required instrument type and click the **Select** button.
For music tutors, an **NQF Level** can be selected from the drop-down list.
- If required, select a **Grade**.
- Click the **Save** button.

Adding a Qualification for a Music Tutor

- Search for the required music tutor to view the details.
For more information, see [Viewing Music Tutors](#) on page 125.
- Select the **Instruments Taught and Qualification** tab.
- On the **Qualification** panel, click the **Add** button.

Managing Trainers

Qualification + Add

Qualification :

Second Subject :

Class Of Degree :

Place of Study :

Date Awarded :

Good Honours Degree :

Subject :

Level :

Country of Origin :

Title :

Verified :

Cancel Save

4. Select the **Qualification** browse button to display the **Qualification** window.

Qualification

de

Code	Description
RED	Bachelor of Education
BENG	Bachelor of Engineering

Close Select

- a. Filter the list based on **Code** or **Description**.
 - b. Select a qualification (*lookup table ID: 0010*).
 - c. Click the **Select** button.
5. Click the **Subject** browse button to display the **Subject** window.

Subject

122

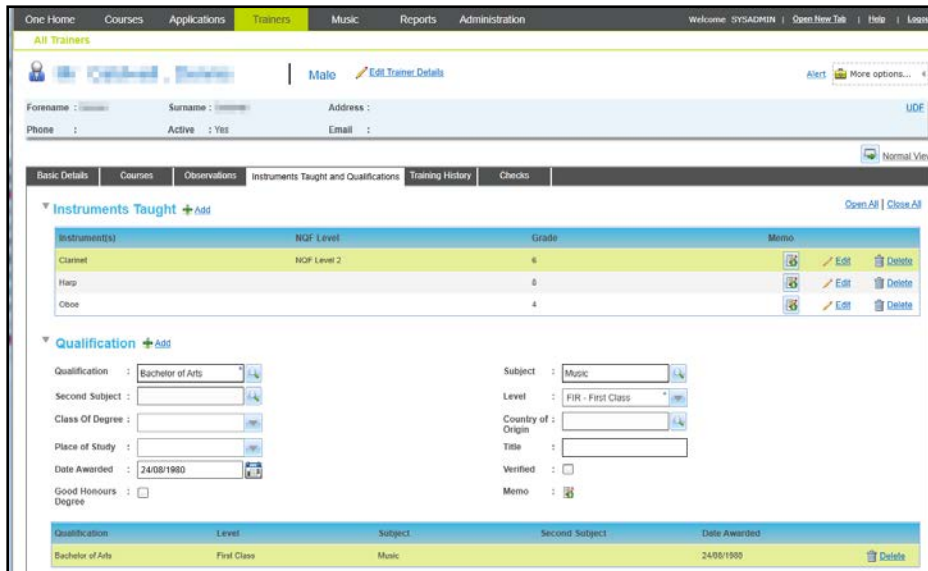
Code	Description
1223	Tourism, Transport and Travel
1224	Training Methods
1225	Training Teachers
1226	Training Teachers - (key stage)
1227	Training Teachers - (key stage)
1228	Training Teachers - Adult Educ
1229	Training Teachers - Coaching

Close Select

- a. Filter the list based on **Code** or **Description**.
 - b. Select the required **Subject**.
 - c. Click the **Select** button.
6. If required, click the **Second Subject** browse button to display the **Subject** window. Select a second **Subject** and click the **Select** button.
 7. Select a **Level** of qualification from the drop-down list (*Lookup table ID: 0616*).
 8. If required, enter the remaining information.
 9. Click the **Save** button.

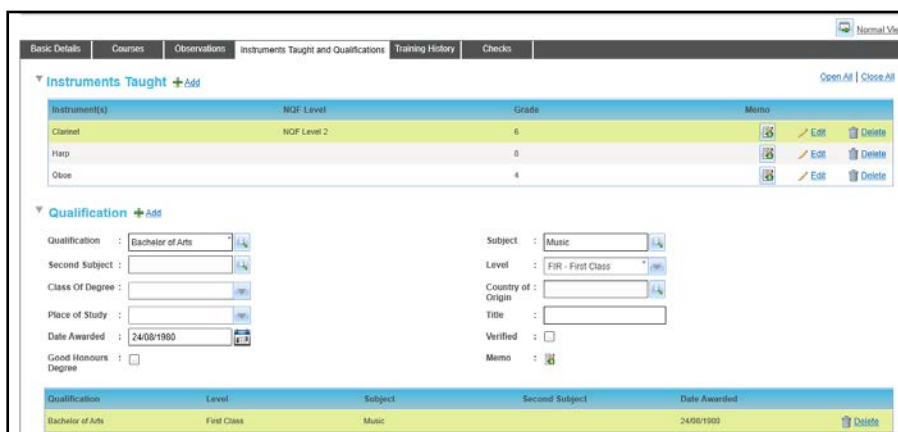
Viewing the Instruments Taught and Qualifications Held

1. Search for the required music tutor to view the details.
For more information, see [Viewing Music Tutors](#) on page 125.
2. Select the **Instruments Taught and Qualification** tab.



Deleting an Instrument Taught or a Qualification Held

1. Search for the required music tutor to view the details.
For more information, see [Viewing Music Tutors](#) on page 125.
2. Select the **Instruments Taught and Qualification** tab.



3. Click the **Delete** button to display a confirmation message.
4. Click the **Yes** button.

Managing Training History

The training history for this music tutor can be viewed and updated via the **Training History** tab.

Viewing the Training History

1. Search for the required music tutor to view the details.
For more information, see [Viewing Music Tutors](#) on page 125.

Managing Trainers

2. Select the **Training History** tab to display the **Training Manager Courses** and **Other Courses** recorded for this trainer.

Course Code	Course Title	Status	Start Date	End Date	Qualification Obtained	Application
BRUM	Birmingham Teaching	Application Received	01/04/1999	31/03/2009	Advanced Level	View Application

Training Date	Level	Course Title	Days	Qualification Obtained	
03/07/2005		First Aid	1	Advanced Level	Delete

On the **Training Manager Courses** panel, you can:

- Click the **Course Title** link to view the course details.
- Click the **View Application** button to view the application details.

Adding a Course to the Training History

Details of a training course can be added to the training history for the music tutor.

NOTE: Training Manager courses cannot be added directly to the Training History.

1. Open the training history for the trainer.
For more information, see [Viewing the Training History](#) on page 135.
2. Click the **Add** button to display the **Other Courses** panel in add mode.

Training Date : Renewal Date :

Level : Course Title :

Amount : Fund :

Days : Qualification Obtained :

Cancel Save

3. Enter a **Course Title**.
4. Complete the other fields as required.
5. Click the **Save** button.

Deleting a Course from the Training History

A training course can be deleted from the **Other Courses** panel on the **Training History** tab.

1. Open the training history for the trainer.
For more information, see [Viewing the Training History](#) on page 135.
2. Click the **Delete** button to display a confirmation message.
3. Click the **Yes** button to delete the course from the training history.

Managing Trainer Checks

Checks carried out for this trainer can be viewed and updated and new checks can be added via the **Checks** tab.

Adding Trainer Checks

1. Display the list of current checks for the trainer.
For more information, see [Viewing Trainer Checks](#) on page 138.
2. Click the **Add** button to display the **Checks** panel in add mode.

3. If required, enter an **Application Ref** and **Disclosure Ref**.
4. Select a **Clearance Type** from the drop-down list.
5. Select a **Date Requested**.
6. Complete the remaining fields as required.
7. If you need to add a countersignatory:
 - a. Click the **Countersignatory** browse button to display the **Select Countersignatory** window.

- b. If required, enter a full or partial Countersignatory name can be entered to filter the list.
 - c. Select the required name in the list and click the **Select** button.
8. Select an **Invoice Point Type** from the drop-down list.

Invoice Point depends on **Invoice Point Type** as follows:

- If the **Invoice Point Type** is **A-Applicant**, the **Invoice Point** is automatically completed with the **Applicant Name**.
- If the **Invoice Point Type** is **B – Base**, select the **Invoice Point** via the **Base Search** dialog.
- If the **Invoice Point Type** is **P – People**, select the **Invoice Point** via the **Person Search** dialog.

9. Click the **Save** button.

Editing Trainer Checks

1. Open the list of current checks for the trainer.
For more information, see [Viewing Trainer Checks](#) on page 138.
2. Click the **Edit** button to display the **Checks** panel in edit mode.

3. Complete the remaining fields as required.
4. If you need to add a countersignatory:
 - a. Click the **Countersignatory** browse button to display the **Select Countersignatory** window.

- b. If required, enter a full or partial **Countersignatory** name can be entered to filter the list.
 - c. Select the required name in the list and click the **Select** button.
5. Select an **Invoice Point Type** from the drop-down list.

Invoice Point depends on **Invoice Point Type** as follows:

Invoice Point is completed as follows:

- **Invoice Point Type** is **A-Applicant**: the **Invoice Point** is automatically completed with the **Applicant Name**.
- **Invoice Point Type** is **not A**: click the browse button to select the **Invoice Point** via the **Person Search** or **Base Search** dialog.

6. Click the **Save** button.

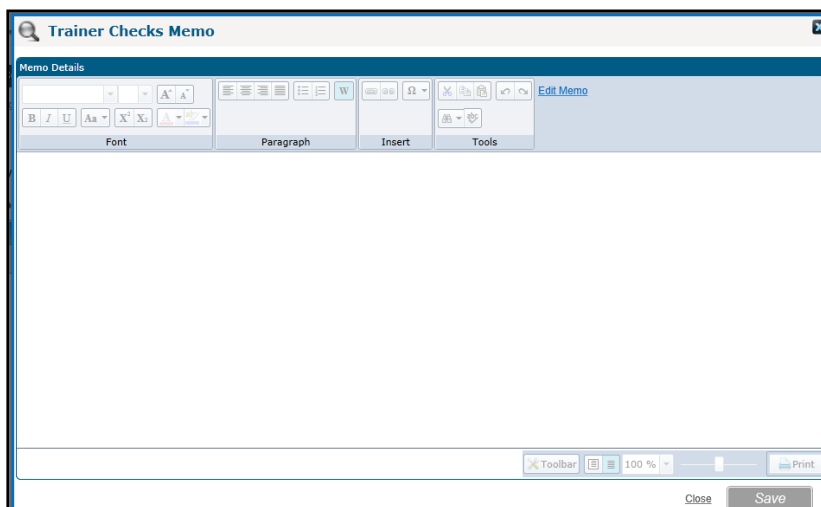
Viewing Trainer Checks

1. Search for the required music tutor to view the details.
For more information, see [Viewing Music Tutors](#) on page 125.
2. Select the **Checks** tab to display the current checks for the trainer.



Recording a Trainer Checks Memo

1. Open the list of current checks for the trainer.
For more information, see [Viewing Trainer Checks](#) on page 138.
2. Click the memo button to display the **Trainer Checks Memo** dialog.



3. Click the **Edit Memo** button.
4. Enter memo text and click the **Save** button

Deleting a Trainer Check

1. Open the list of current checks for the trainer.
For more information, see [Viewing Trainer Checks](#) on page 138.
2. Click the **Delete** button to display a confirmation message.
3. Click the **Yes** button to delete the trainer check.

06 / Managing Reports

Overview of Reports

Music Tuition v4 provides preconfigured Crystal reports. The available reports include:

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

Managing reports in Music Tuition is similar to managing reports in other areas of One v4 Online.

For more information on using the reports functionality, refer to the Common Functionality | Reports section of the v4 Online help or the following reference guide available on the One Publications website and on My Account:

- RG_Online_Common_Reports

07 / Managing Students

Introduction to Managing Students

Details of students who are associated with music courses, instrument hire or ensemble can be viewed or updated via the **Music** area.

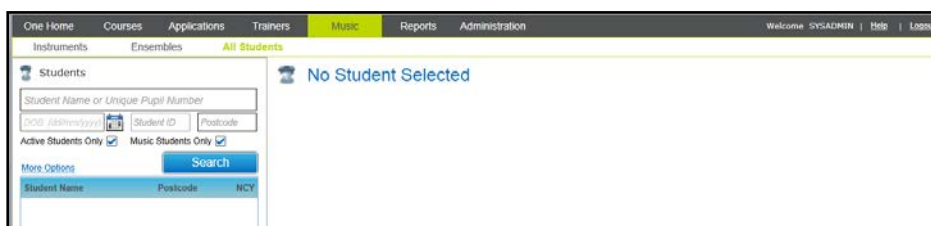
Maintaining Student Details

The **All Students** tab enables you to view the student details, music courses, instruments hired and results attained. Ensemble details for the students can be updated.

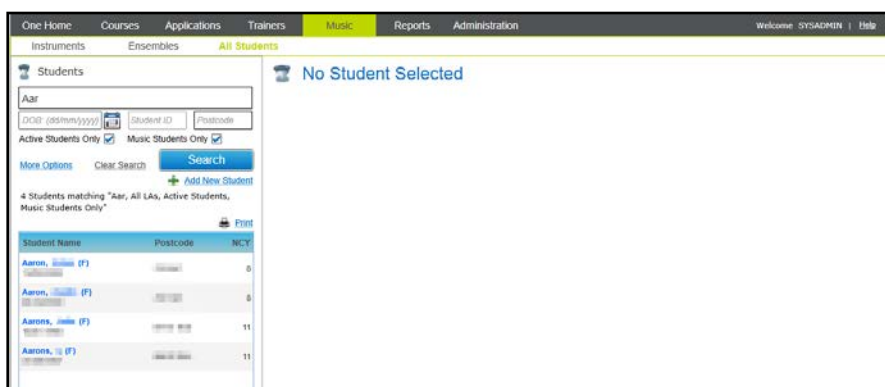
Viewing Music Student Details

You can search for and view the details of students that are associated with music courses, instrument hire or ensembles. The search criteria available are the basic student identifiers, base details for the student and further student information.

1. Select the **Music** area.
2. Select the **All Students** tab.



3. Enter your search criteria. Click the **More Options** link to display additional search criteria.
4. Click the **Search** button to display a list of matching students.



5. Select a student in the list to display the student details.

The screenshot displays the 'All Students' interface. At the top, there are navigation tabs: One Home, Courses, Applications, Trainers, Music (highlighted), Reports, and Administration. Below these are sub-tabs: Instruments, Ensembles, and All Students. The main content area shows a student profile for a female student. Key information includes: Active: Yes, Student ID, NCY (inc offset): 8, Home LA, and Funding LA. There are 'Edit Student Details' buttons for various sections: Student Profile, Addresssee, Language Details, and Ethnicity, Religion and Culture. The Student Profile section shows details like Inactive Reason, Inactive Date, NCY (incl offset), Offset, Not following NCY, Age on 01/09/2015, and Unique L. The Addresssee section shows 'Parent/Carer of Aaron'. The Language Details section shows Home Language, First Language, and EAL: No. The Ethnicity, Religion and Culture section shows Nationality, Country of Origin, Student Ethnicity, Ethnic Source, Religion, and Culture.

Editing Student Details

The **All Students** page provides tabs that enable you to edit student details.

1. Select the **Students** area.
2. Ensure the **All Students** tab is selected.
3. Search for the required student.

For more information, see [Viewing Music Student Details](#) on page 143.

4. Select the required tab.
5. Click the **Edit** button to display the required panel in edit mode.
6. Edit the required information.
7. Click the **Save** button.

Viewing Student's Music Courses

1. Open the music student details.

For more information, see [Viewing Music Student Details](#) on page 143.

Select the **Courses** tab to display a list of courses for this student.

The screenshot shows the 'Course Details' panel for a student. At the top, there are navigation tabs: One Home, Courses, Applications, Trainers, Music (highlighted), Reports, and Administration. Below these are sub-tabs: Instruments, Ensembles, and All Students. The main content area shows a student profile for a female student with details like Active status, Student ID, NCY (inc offset), Home LA, and Funding LA. Below the profile are tabs for Student Basic Details, Special Needs, Student Additional, Student History, Carers, Public Care, Courses (highlighted), Ensembles, and Instrument(s) Hired. The Course Details panel shows a filter for Course Name and a table of courses. The table has columns: Course Name, Trainer, Start Date, End Date, Instrument, Invoice Point, and Status. One course is listed: Bassoon Lessons, with a start date of 14/10/2014 and an end date of 31/10/2014. The status is 'Application Received' and there is a 'View Application' link.

2. If required, enter a full or partial **Course Name** to filter the list of courses.
3. On the **Course Details** panel you can:
 - Click the **Course Name** link to view the **Course Details**.
 - Click the **View Application** link to view the **Application Details**.

Viewing Student's Ensemble

1. Open the music student details.

For more information, see [Viewing Music Student Details](#) on page 143.

2. Select the **Ensembles** tab.

Ensemble	Date Joined	Date Left
kd	01/07/2014	13/07/2014

Editing Student's Ensemble

1. Open the music student details.

For more information, see [Viewing Music Student Details](#) on page 143.

2. Select the **Ensembles** tab.

3. Select an **Instrument**.

For more information, see [Selecting an Instrument](#) on page 145.

4. Select a **Date Left**.

5. Click the **Save** button.

Adding a Student's Ensemble

A new ensemble can be associated with this student.

1. Open the music student details.

For more information, see [Viewing Music Student Details](#) on page 143.

2. Select the **Ensembles** tab.

3. Click the **Add** button.

4. Select an **Ensemble** from the drop-down list.

5. Select an **Instrument**.

For more information, see [Selecting an Instrument](#) on page 145.

6. Select a **Date Joined**.

The remaining information is automatically completed.

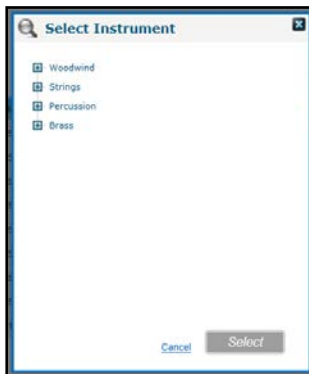
7. Click the **Save** button.

Selecting an Instrument

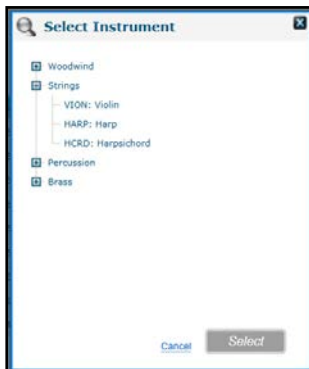
The **Select Instrument** dialog enables you to search for a specific instrument.

Managing Students

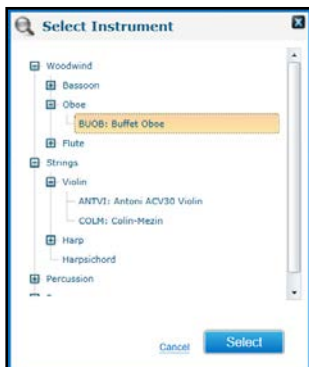
1. Click the **Instrument** browse button to display the **Select Instrument** dialog.



2. Click an expand button to view the list of instruments of that class.



3. Click the expand button for the instrument type to view specific instruments.



4. Select the required instrument and click the **Select** button.

Viewing Student's Instruments Hired

The instruments hired by this student can be viewed.

1. Open the music student details.
For more information, see [Viewing Music Student Details](#) on page 143.
2. Select the **Instrument(s) Hired** tab.

Instrument	Security Number	Hire Start Date	Return Date	Actual Returned Date	Date When Hired
Amu8 Bassoon 41J	123553333	25/07/2005			
1 Yamaha B Flat Clarinet	1	03/07/2005			

Viewing Results Attained

The results attained by the student can be viewed.

NOTE: Music results are maintained in v4 Client. Grades are defined via **v4 Client | Focus | Aspects Management**.

1. Open the music student details.

For more information, see [Viewing Music Student Details](#) on page 143.

2. Select the **Results Attained** tab.



08 / Managing Ensembles

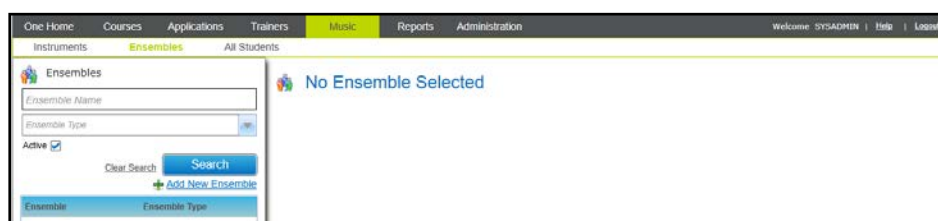
Introduction to Managing Ensembles

The **Ensembles** tab enables you to record details of groups of musicians, such as orchestras and bands who come together for musical activities.

You can record basic and contact details for each ensemble. Any number of bases can be linked to an ensemble and you can maintain a full record of members and any associated charges.

Adding a New Ensemble

1. Select the **Music** area.
2. Select the **Ensembles** tab to display the **Ensembles** search panel.



3. Click the **Add New Ensemble** button to display the **Add New Ensemble** screen.



4. Enter an **Ensemble Name**.
5. Select an **Ensemble Type** from the drop-down.
6. Click the **Contact Person** browse button to display the **Person Search** dialog.
7. Search for and select a person.

For more information, see [Selecting a Person using Person Search](#) on page 32.

8. If required, enter the remaining information
9. Click the **Save** button.

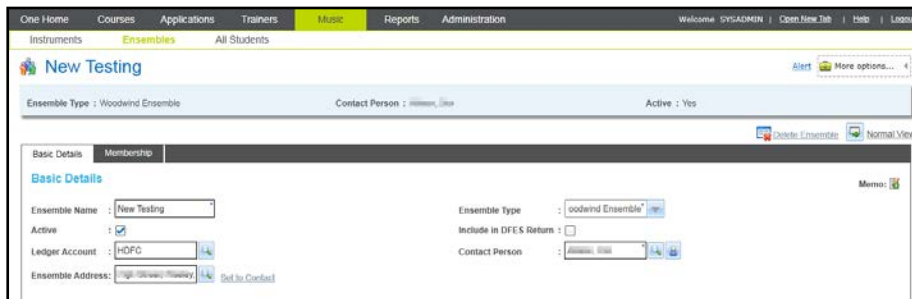
Viewing Ensemble Details

1. Select the **Music** area.
2. Select the **Ensembles** tab.



Managing Ensembles

3. Enter your search criteria.
4. Click the **Search** button to display a list of matching ensembles.
5. Select an ensemble in the list to view the details.

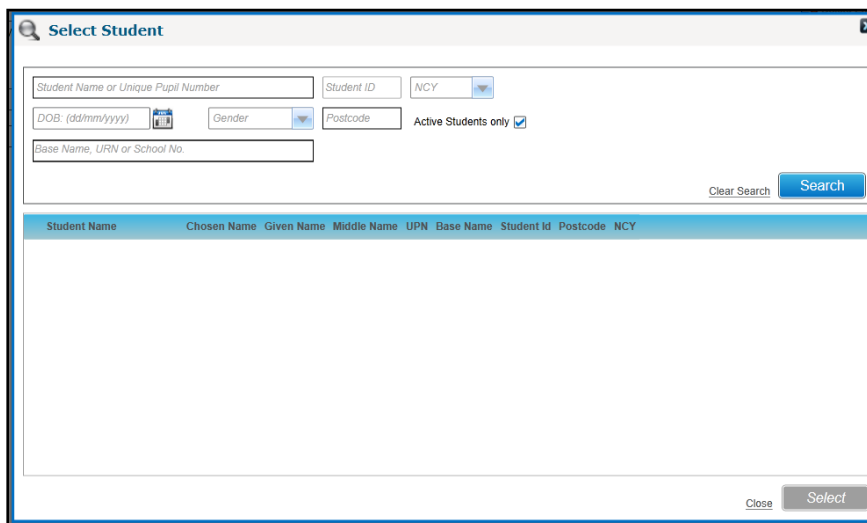


Adding an Ensemble Member

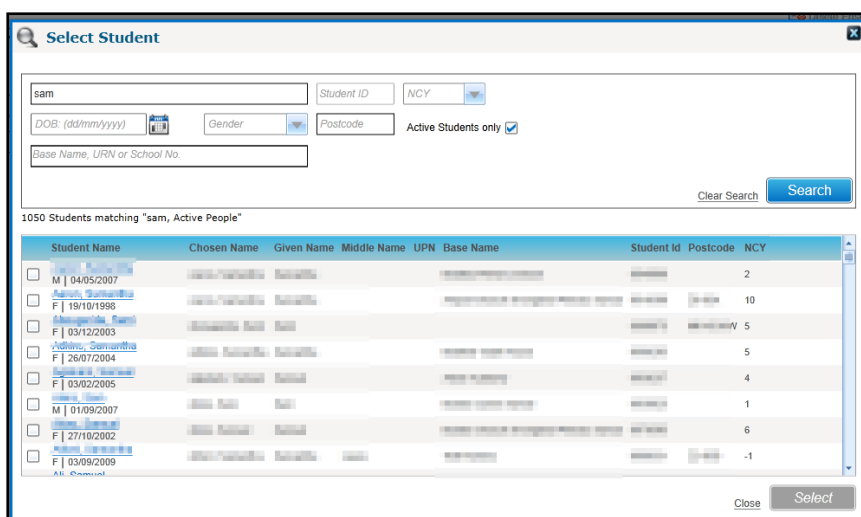
1. Open the membership details for an ensemble.
For more information, see [Viewing Ensemble Details](#) on page 149.
2. Click the **Add** button to display the **Membership Details** panel in add mode.



3. Click the **Name** browse button to display the **Select Student** dialog.



4. Enter search details and click the **Search** button to display a list of matching students.



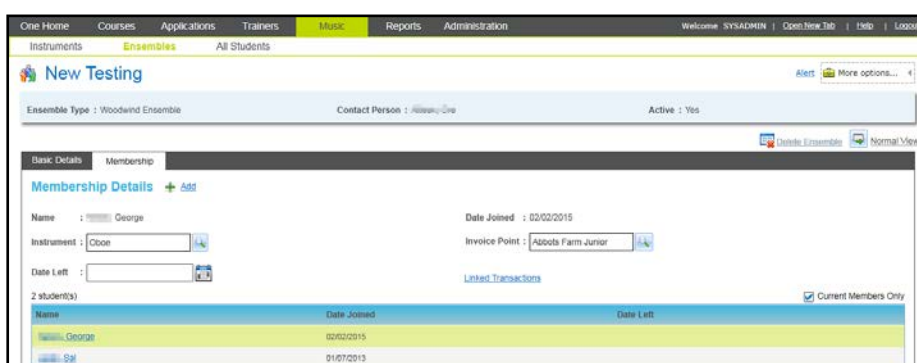
5. Select the check box for the required student.
6. Click the **Select** button.
7. Select a **Date Joined**.
8. Select an instrument.
For more information, see [Selecting an Instrument](#) on page 145.
9. If required, select an Invoice Point.
10. Click the **Save** button.

NOTE: A student cannot have overlapping membership details for the same ensemble.

Viewing Ensemble Membership Details

The members of an ensemble can be viewed.

1. Open the ensemble details.
For more information, see [Viewing Ensemble Details](#) on page 149.
2. Select the **Membership** tab to display the **Membership Details**.
3. Select a student in the list to display the **Instrument** played.



4. If required, deselect the **Current Members Only** check box to view students who have left the ensemble.
5. If required, click the student **Name** to display the student details.

Editing Ensemble Membership Details

1. Open the ensemble membership details.
For more information, see [Viewing Ensemble Details](#) on page 149.
2. Select the required **Name** in the list to display the details.

The screenshot shows the 'New Testing' page in the system. The 'Membership' tab is active, displaying details for a student named George. The 'Instrument' is set to 'Cobon', 'Date Joined' is 02/02/2015, and 'Invoice Point' is 'Abbots Farm Juniors'. Below the form is a table with 2 students:

Name	Date Joined	Date Left
George, George	02/02/2015	
Stf	01/07/2013	

3. The details can be edited as follows:
 - a. Click the **Instrument** browse button to select an instrument.
For more information, see [Selecting an Instrument](#) on page 145
 - b. An **Invoice Point** can be selected.
 - c. A **Date Left** can be selected.
4. Click the **Save** button.

Deleting an Ensemble

An ensemble can only be deleted if it does not have any current members or instrument hire details.

1. Select the **Music** area and open the required ensemble.
For more information, see [Viewing Ensemble Details](#) on page 149.

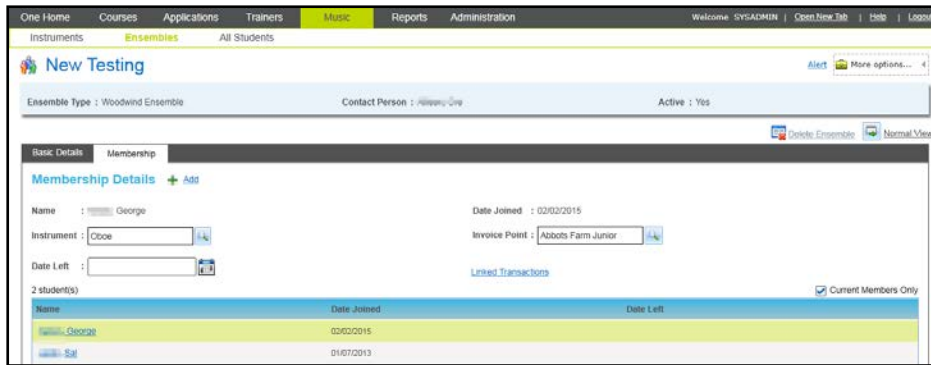
The screenshot shows the 'Basic Details' page for an ensemble. The 'Delete Ensemble' button is visible in the top right corner. The 'Active' checkbox is checked. The 'Ensemble Type' is 'Woodwind Ensemble'. The 'Include in DFES Return' checkbox is unchecked.

2. Click the **Delete Ensemble** button to display confirmation message.
3. Click the **Yes** button to delete the ensemble.

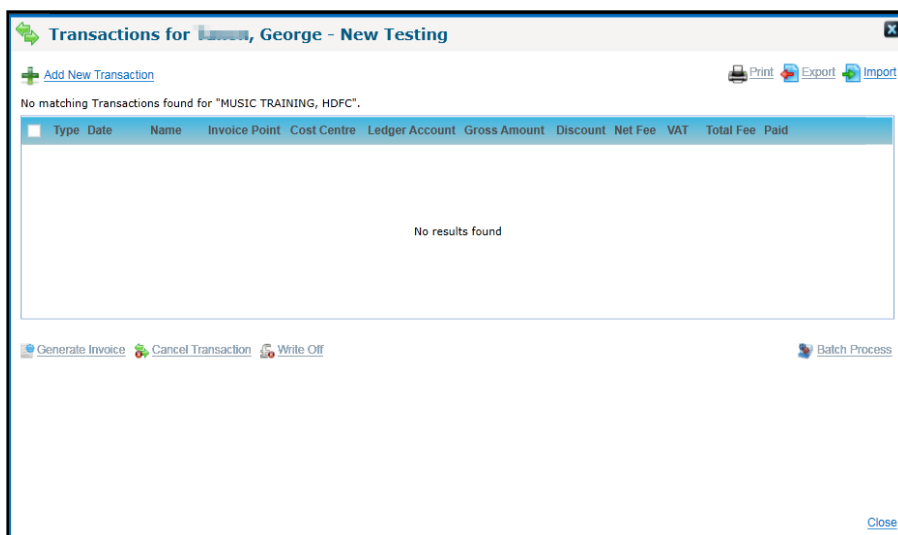
Creating Transactions for an Ensemble Member

You can create a new sales order transaction linked to a specific ensemble membership record.

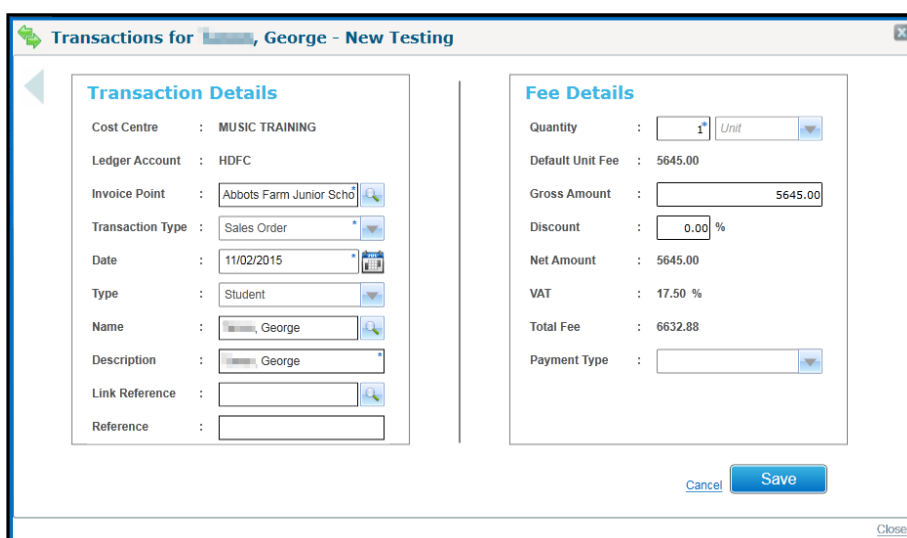
NOTE: The **Linked Transactions** link is only displayed if the membership record has an associated invoice point and is for an ensemble that is linked with a ledger account with a default fee greater than zero.



1. Open the ensemble details.
For more information, see [Viewing Ensemble Details](#) on page 149.
2. Select the **Membership** tab to display the **Membership Details**.
3. Click the **Linked Transactions** link to display the **Transactions For** dialog for the selected membership record.



4. Click the **Add New Transaction** link to display the **Transaction Details** window.



5. Edit the transaction details as required.
6. Click the **Save** button.

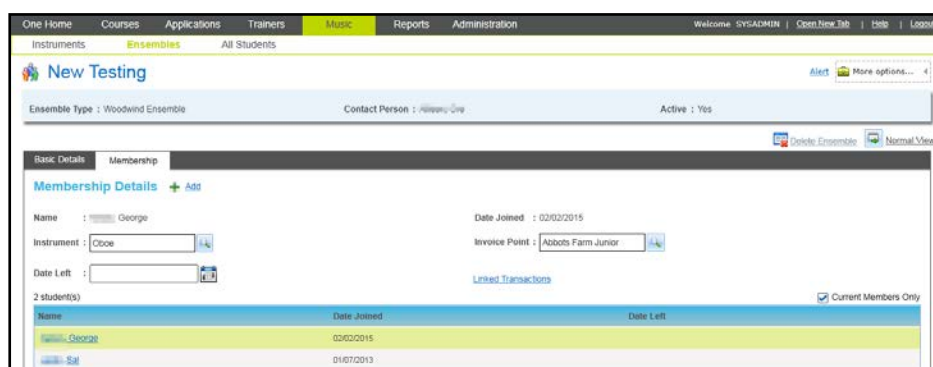
Viewing Transactions for an Ensemble Member

If there is an invoice point specified for the ensemble membership record and the ensemble is linked to a ledger account with a default fee greater than zero, you can view transactions for the member.

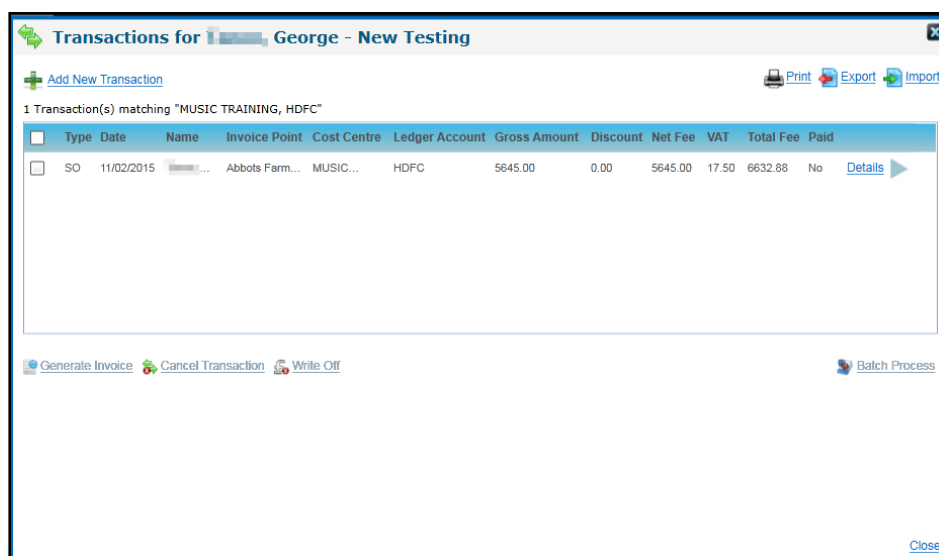
1. Open the ensemble details.

For more information, see [Viewing Ensemble Details](#) on page 149.

2. Select the **Membership** tab to display the **Membership Details**.



3. Click the **Linked Transactions** link to display the transactions for the ensemble member.



Managing Billing for an Ensemble

Transactions linked to an ensemble can be viewed and created via the **More Options | Billing** link.

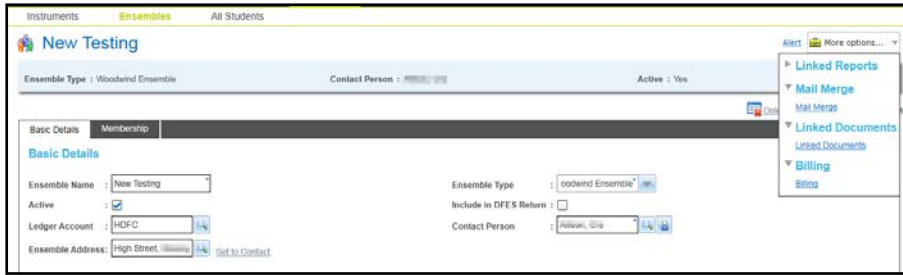
NOTE: A transaction created via the ensemble billing area is linked to the ensemble itself and not to a specific membership record. In order to create a transaction linked to a membership record, use the **Linked Transactions** option.

For more information, see [Creating Transactions for an Ensemble Member](#) on page 152.

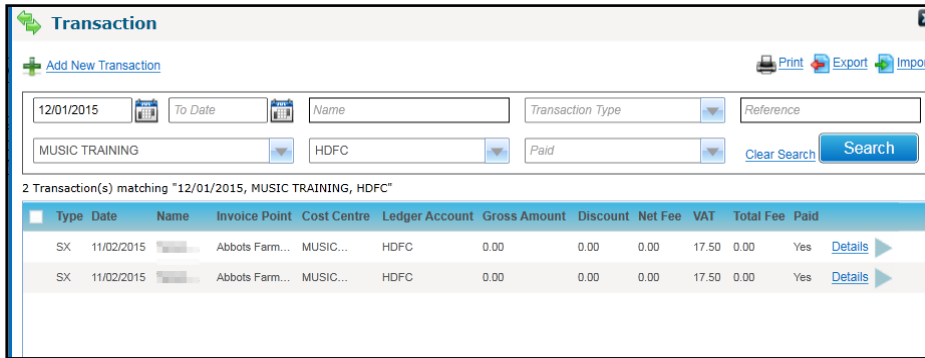
Creating Transactions for an Ensemble

1. View the ensemble details.

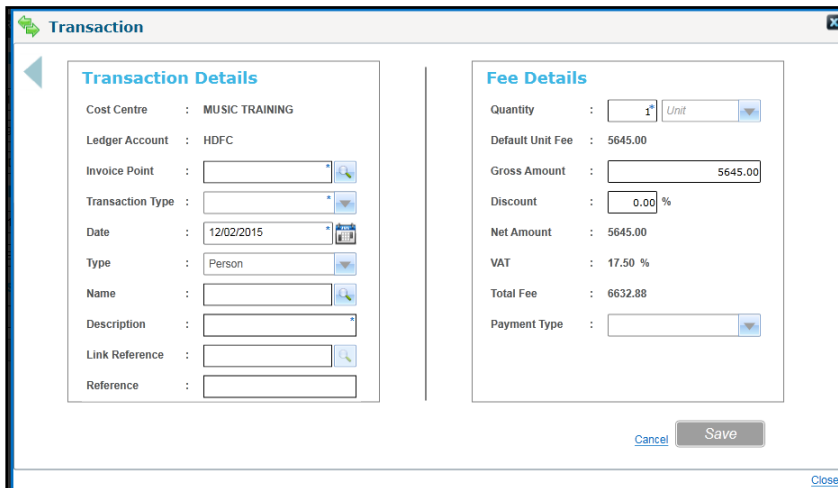
For more information, see [Viewing Ensemble Details](#) on page 149.



2. Click the **More Options | Billing** link to display the **Transaction** dialog.



3. Click the **Add New Transaction** link to display the **Transaction Details** dialog.



4. Select an **Invoice Point**.
5. Select a **Transaction Type** from the drop-down list.
6. Enter a **Description**.
7. Click the **Save** button.

Viewing Transactions for an Ensemble

1. View the ensemble details.

For more information, see [Viewing Ensemble Details](#) on page 149.

Managing Ensembles

Instruments **Ensembles** All Students

New Testing

Ensemble Type : Woodwind Ensemble Contact Person : [Name] Active : Yes

Basic Details Membership

Basic Details

Ensemble Name : New Testing Ensemble Type : Woodwind Ensemble

Active : Include in DFES Return :

Ledger Account : HDFC Contact Person : [Name]

Ensemble Address : High Street [Address] [Set to Contact](#)

Alert More options...
▶ Linked Reports
▶ Mail Merge
▶ Mail Merge
▶ Linked Documents
▶ Linked Documents
▶ Billing
▶ Billing

2. Click the **More Options | Billing** link to display the **Transaction** dialog.

Transaction

[Add New Transaction](#) [Print](#) [Export](#) [Import](#)

12/01/2015 To Date Name Transaction Type Reference

MUSIC TRAINING HDFC Paid Clear Search [Search](#)

2 Transaction(s) matching "12/01/2015, MUSIC TRAINING, HDFC"

Type	Date	Name	Invoice Point	Cost Centre	Ledger Account	Gross Amount	Discount	Net Fee	VAT	Total Fee	Paid	
SX	11/02/2015	Tanon,...	Abbots Farm...	MUSIC...	HDFC	0.00	0.00	0.00	17.50	0.00	Yes	Details
SX	11/02/2015	Tanon,...	Abbots Farm...	MUSIC...	HDFC	0.00	0.00	0.00	17.50	0.00	Yes	Details

09 / Managing Instruments

Introduction to Managing Instruments

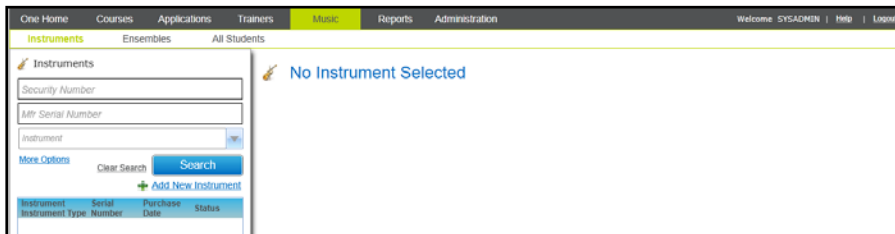
The **Instruments** tab maintains a record of instruments available for hire within the Local Authority. Details of specific instruments are recorded, with purchase and disposal details. A complete hire and repair record can be maintained.

Maintaining Instrument Inventory

An inventory of instruments is maintained via the **Music | Instruments** tab.

Adding a New Instrument

1. Select the **Music** area.
2. Ensure that the **Instruments** tab is selected.



3. Click the **Add New Instrument** button to display the **Add New Instrument** page.

 A screenshot of the 'Add New Instrument' form. The form is titled 'Add New Instrument' and is divided into two sections: 'Inventory Details' and 'Purchase Details'.

 Under 'Inventory Details', there are input fields for 'Security Number', 'Mfr Serial Number', and 'Instrument'. The 'Instrument' field has a browse button.

 Under 'Purchase Details', there are input fields for 'Date', 'Supplier', and 'Cost'.

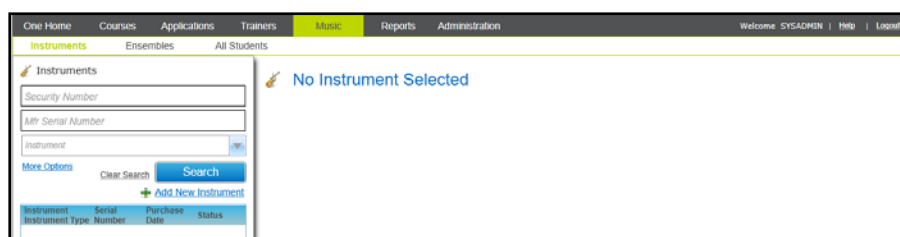
 At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

4. On the **Inventory Details** panel:
 - a. Enter a **Security Number** and an **Mfr Serial Number**.
 - b. Click the **Instrument** browse button to select an instrument model.
For more information, see [Viewing Instrument Inventory](#) on page 157.
5. If required, enter **Purchase Details**.
6. Click the **Save** button.

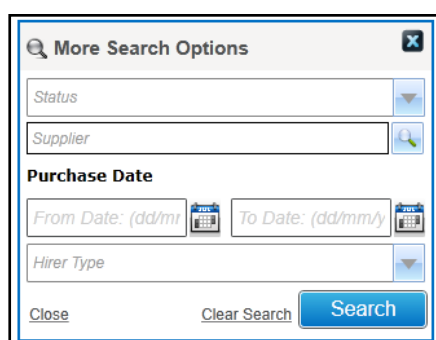
Viewing Instrument Inventory

1. Select the **Music** area.
2. Ensure that the **Instruments** tab is selected.

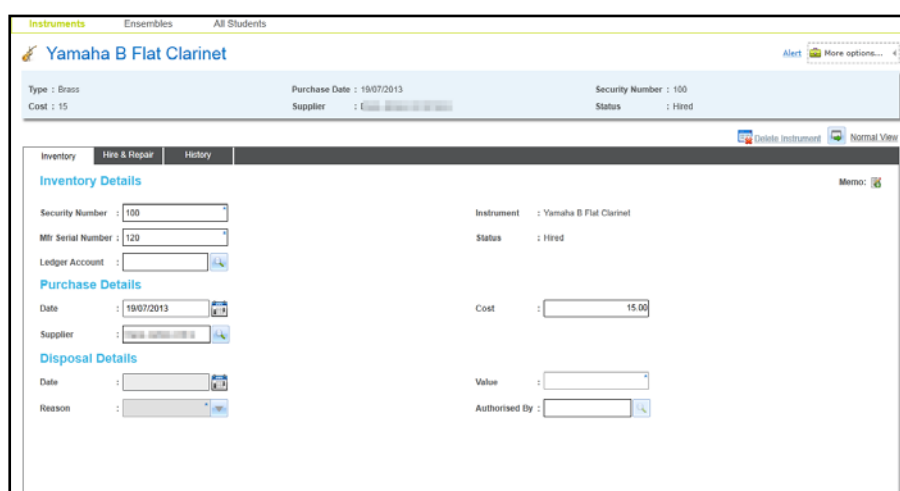
Managing Instruments



3. If required, enter your search criteria. Click the **More Options** button to display the **More Search Options** panel



4. Click the **Search** button to display a list of matching instruments.
5. Select an instrument in the list to display the details.



Alternatively, click the **Add New Instrument** button to add a new instrument.

Editing Instrument Inventory

1. Search for and select an instrument to display the details.
For more information, see [Viewing Instrument Inventory](#) on page 157.
2. Ensure that the **Inventory** tab is selected.
3. If required, edit the **Inventory Details**, **Purchase Details** and **Disposal Details**.

NOTE: The **Disposal Details** cannot be edited if the **Status** is **Hired** or **Repair**.

4. Click the **Save** button.

Maintaining Instrument Hire and Repair

A record of a particular instrument's hire or repair is maintained via the **Hire & Repair** tab.

Adding Hire Details

You can add hire details for an instrument that is currently in stock.

1. View the instrument inventory and select an instrument with a status of **In Stock**.
For more information, see [Viewing Instrument Inventory](#) on page 157.
2. Select the **Instrument Hire & Repair** tab to display the details.

3. Click the **Add** button to display the **Hire Details** in add mode.

4. Select the required **Hirer Type** radio button (**Bases**, **Ensemble** or **Student**).
5. Click the **Hirer** browse button to display the appropriate search dialog (**Base Search**, **Select Ensemble** or **Select Student**) and select a **Hirer**.
6. Select a **Hirer Start Date**.
7. If required, select a **Request Date**.
8. If required, add an invoice point to charge the hire to:
 - a. Click the **Charge To** browse button to display the **Search Invoice Point** dialog.

Managing Instruments

- b. Enter the required search criteria and click the **Search** button.
 - c. If required, click the **Add New Invoice Point** button to display the **Add New Invoice Point** screen. For more information, see [Adding an Invoice Point](#) on page 37.
 - d. Click the **Select** button to close the **Search Invoice Point** dialog.
9. Click the **Save** button.

Viewing Instrument Hire and Repair

1. Open the instrument inventory and select an instrument to display the details.
For more information, see [Viewing Instrument Inventory](#) on page 157.
2. Select the **Hire & Repair** tab to display the **Hire Details** and **Repair** panels.

The screenshot shows the 'Yamaha B Flat Clarinet' instrument details page. The 'Hire & Repair' tab is active. The 'Hire Details' section includes fields for 'Hired To' (Jillilly Middle School), 'Current Base' (Not Applicable), 'Hire Start Date' (16/02/2015), 'Actual Returned Date', 'Charge To' (Neville Smith-Jones), 'Base When Hired' (Not Applicable), 'Request Date', 'Return Date', and 'Memo'. Below this is a table of hire records:

Hirer	Hire Start Date	Return Date	Actual Returned Date	
Jillilly Middle School	16/02/2015			Delete
Jillilly Middle School	07/05/2013			Delete
Jillilly Middle School	01/04/2010			Delete

Editing Hire Details

1. Open the instrument inventory and select an instrument to display the details.
For more information, see [Viewing Instrument Inventory](#) on page 157.
2. Select the **Hire & Repair** tab to display the **Hire Details** and **Repair** panels.
3. Select the required **Hirer** in the list to display the details.

This screenshot is identical to the previous one, showing the 'Hire & Repair' tab for the 'Yamaha B Flat Clarinet'. It displays the same 'Hire Details' and table of hire records.

4. Edit the **Hire Details** or add a **Memo** as required.
5. Click the **Save** button.

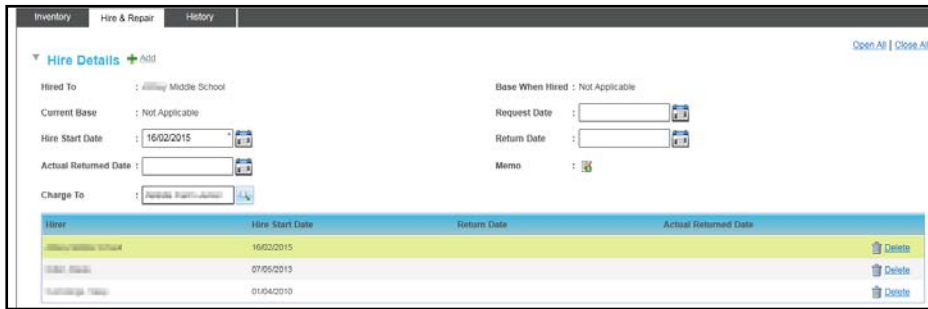
Deleting Hire Details

An instrument hire record can be deleted.

1. Open the instrument inventory and select an instrument to display the details.

For more information, see [Viewing Instrument Inventory](#) on page 157.

2. Select the **Hire & Repair** tab to display the **Hire Details** and **Repair** panels.



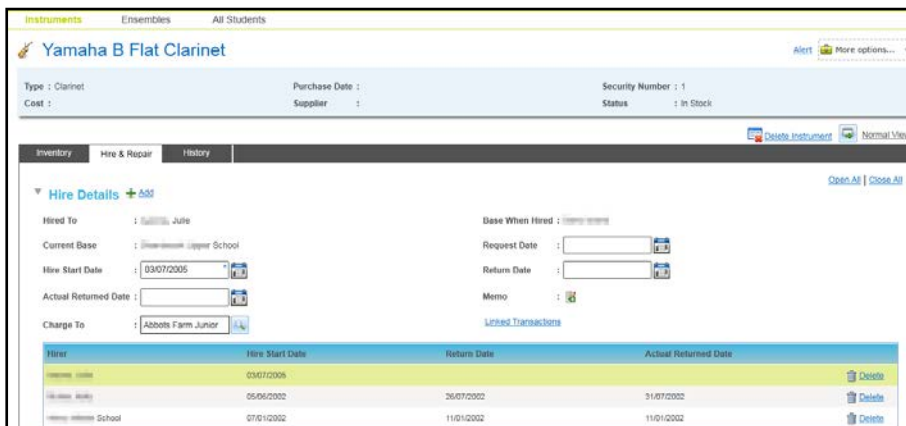
3. In the record list, click the **Delete** button for the required **hire** to display a confirmation message.
4. Click the **Yes** button to delete the hire details.

Creating Transactions Linked to a Hire Record

You can create a sales order transaction linked to a specific hire record via the **Linked Transactions** link.

NOTE: The **Linked Transactions** link is only displayed if the hire record has an associated invoice point and is for an instrument that is linked with a ledger account with a default fee greater than zero.

1. Open the instrument inventory and select an instrument to display the details.
For more information, see [Viewing Instrument Inventory](#) on page 157.
2. Select the **Hire & Repair** tab to display the **Hire Details** and **Repair** panels



3. Click the **Linked Transactions** link to display the **Transactions for** screen.



4. Click the **Add New Transaction** link to display the pre-populated sales order **Transaction Details** for the hire record.

5. Edit the transaction details as required.
6. Click the **Save** button.

Viewing Transactions Linked to a Hire Record

You can view sales order transactions linked to a specific hire record.

NOTE: The **Linked Transactions** link is only displayed if the hire record has an associated invoice point and is for an instrument that is linked with a ledger account with a default fee greater than zero.

1. Open the instrument inventory and select an instrument to display the details.
For more information, see [Viewing Instrument Inventory](#) on page 157.
2. Select the **Hire & Repair** tab to display the **Hire Details** and **Repair** panels.

Hirer	Hire Start Date	Return Date	Actual Returned Date
Abbots Farm Junior School	03/07/2005		
Abbots Farm Junior School	05/06/2002	26/07/2002	31/07/2002
Abbots Farm Junior School	07/01/2002	11/01/2002	11/01/2002

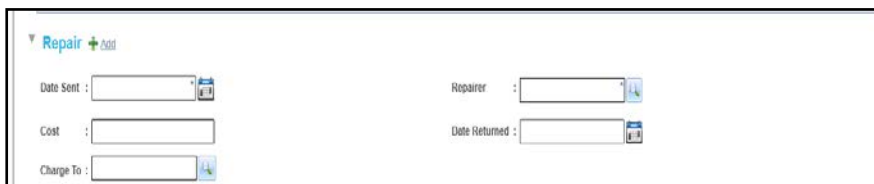
3. Click the **Linked Transactions** link to display the transactions linked to the hire record.



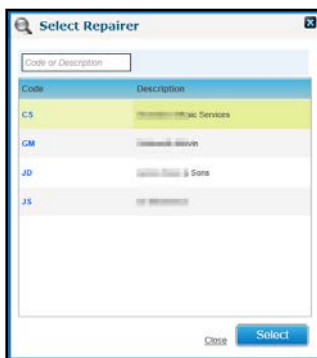
Adding Repair Details

You can add repair details for an instrument that is currently in stock.

1. Open the instrument inventory and select an instrument with a status of **In Stock**.
For more information, see [Viewing Instrument Inventory](#) on page 157.
2. Select the **Hire & Repair** tab to display the details.
3. Click the **Add** button on the **Repair** panel to display the panel in add mode.

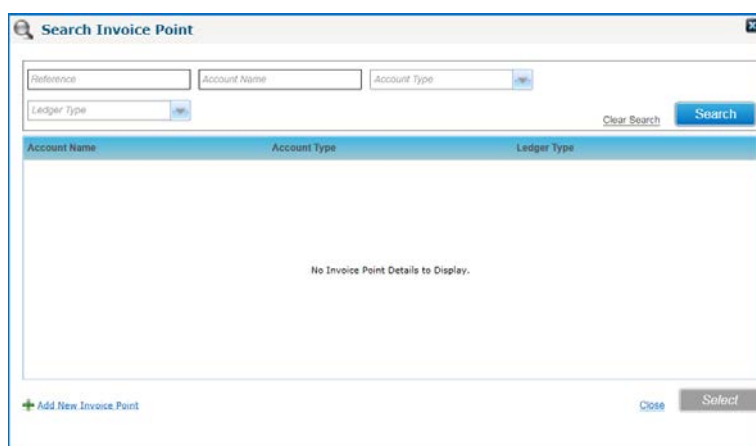


4. Select a **Date Sent**.
5. Click the **Repairer** browse button to display the **Select Repairer** dialog.



6. Select a repairer and click the **Select** button.
7. If required, enter a **Cost** and a **Date Returned**.
8. If required, add an invoice point to charge the hire to:
 - a. Click the **Charge To** browse button to display the **Search Invoice Point** dialog.

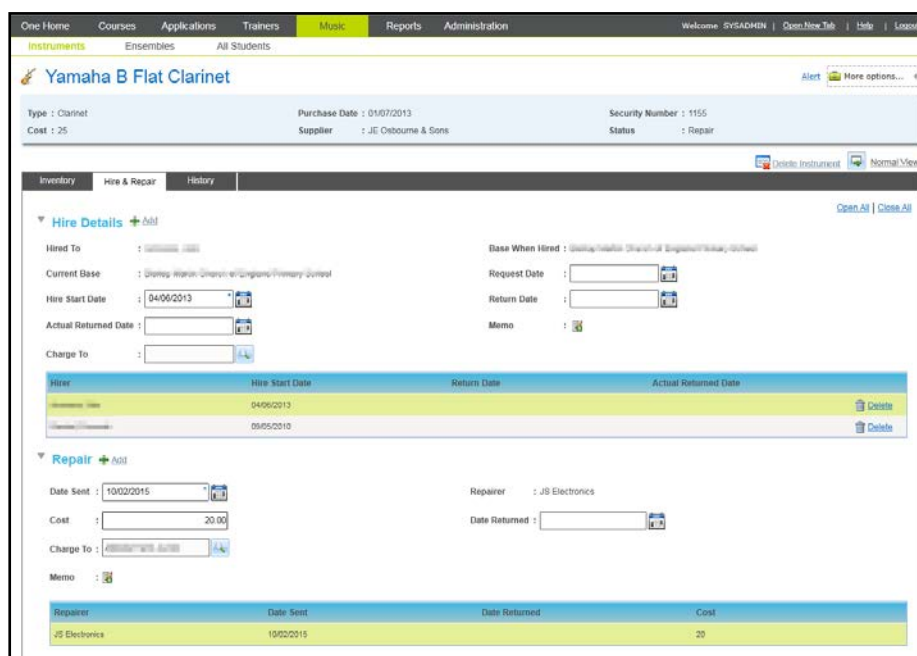
Managing Instruments



- b. Enter the required search criteria and click the **Search** button.
 - c. If required, click the **Add New Invoice Point** button to display the **Add New Invoice Point** screen. For more information, see [Adding an Invoice Point](#) on page 37.
 - d. Click the **Select** button to close the **Search Invoice Point** dialog.
9. Click the **Save** button.

Editing Repair Details

1. Open the instrument inventory and select an instrument to display the details. For more information, see [Viewing Instrument Inventory](#) on page 157.
2. Select the **Hire & Repair** tab to display the **Hire Details** and **Repair** panels.
3. Select the required **Repairer** in the list to display the details.



Hire	Hire Start Date	Return Date	Actual Returned Date
Instrument Hire	04/06/2013		
Instrument Hire	09/05/2010		

Repairer	Date Sent	Date Returned	Cost
JS Electronics	10/02/2015		20

4. Edit the **Hire Details** or add a **Memo** as required.
5. Click the **Save** button.

Creating Transactions Linked to a Repair

You can create a new sales order transaction linked to a specific repair record.

NOTE: The **Linked Transactions** link is only displayed if the repair record has an associated invoice point and is for an instrument that is linked with a ledger account with a default fee greater than zero.

1. Open the instrument inventory and select an instrument to display the details.
For more information, see [Viewing Instrument Inventory](#) on page 157.
2. Select the **Hire & Repair** tab to display the **Hire Details and Repair** panels.
3. Select the required **Repairer** in the list to display the details.

Repairer	Date Sent	Date Returned	Cost
JS Electronics	10/02/2015		20

4. Click the **Linked Transactions** link to display the **Transactions for Repair** screen.

No matching Transactions found for "MUSIC TRAINING, HDFC".

Type	Date	Name	Invoice Point	Cost Centre	Ledger Account	Gross Amount	Discount	Net Fee	VAT	Total Fee	Paid
No results found											

5. Click the **Add New Transaction** link to display the **Transaction Details** dialog.

Transaction Details

Cost Centre : MUSIC TRAINING
 Ledger Account : HDFC
 Invoice Point :
 Transaction Type : Sales Order
 Date : 10/02/2015
 Type :
 Name :
 Description : JS Electronics
 Link Reference :
 Reference :

Fee Details

Quantity : Unit
 Default Unit Fee : 5645.00
 Gross Amount : 5645.00
 Discount : 0.00 %
 Net Amount : 5645.00
 VAT : 17.50 %
 Total Fee : 6632.88
 Payment Type :

Cancel Save

6. Select an **Invoice Point**.
7. Edit any other transaction details as required.
8. Click the **Save** button.

Viewing Transactions Linked to a Repair

1. Open the instrument inventory and select an instrument to display the details.
For more information, see [Viewing Instrument Inventory](#) on page 157.
2. Select the **Hire & Repair** tab to display the **Hire Details** and **Repair** panels.
3. Select the required **Repairer** in the list to display the details.

Repairer	Date Sent	Date Returned	Cost
JS Electronics	10/02/2015		20

4. Click the **Linked Transactions** link to display the **Transactions for Repair** screen.

Type	Date	Name	Invoice Point	Cost Centre	Ledger Account	Gross Amount	Discount	Net Fee	VAT	Total Fee	Paid
SO	10/02/2015	Abbots Farm...	MUSIC...	HDFC		5645.00	0.00	5645.00	17.50	6632.88	No

Managing Instrument Billing

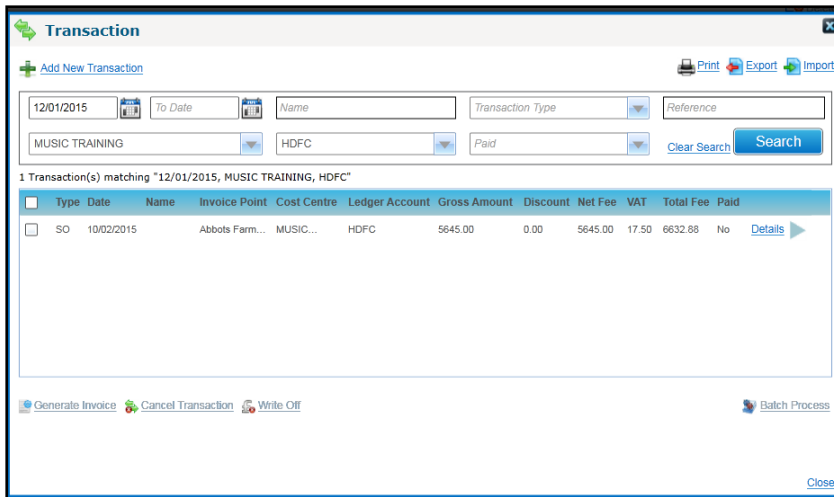
Transactions linked to an instrument can be viewed and created via the **More Options | Billing** link.

NOTE: A transaction created via the instrument billing area is linked to the instrument itself and not to a specific hire or repair record. In order to create a transaction linked to a hire or repair record, use the **Linked Transactions** option.
For more information, see [Creating Transactions Linked to a Hire Record](#) on page 161 and [Creating Transactions Linked to a Repair](#) on page 164.

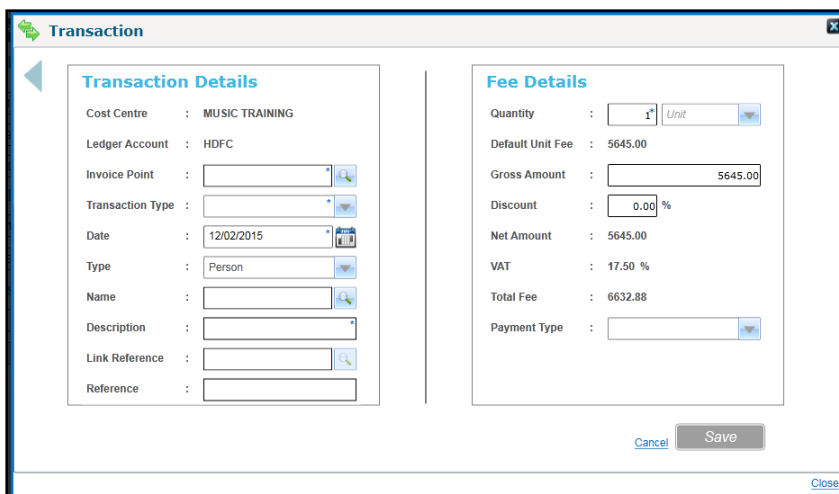
Creating Transactions for an Instrument

1. Open the instrument inventory and select an instrument to display the details.
For more information, see [Viewing Instrument Inventory](#) on page 157.

2. Click the **More Options | Billing** link to display the **Transaction** dialog.



3. Click the **Add New Transaction** link to display the **Transaction Details** dialog.



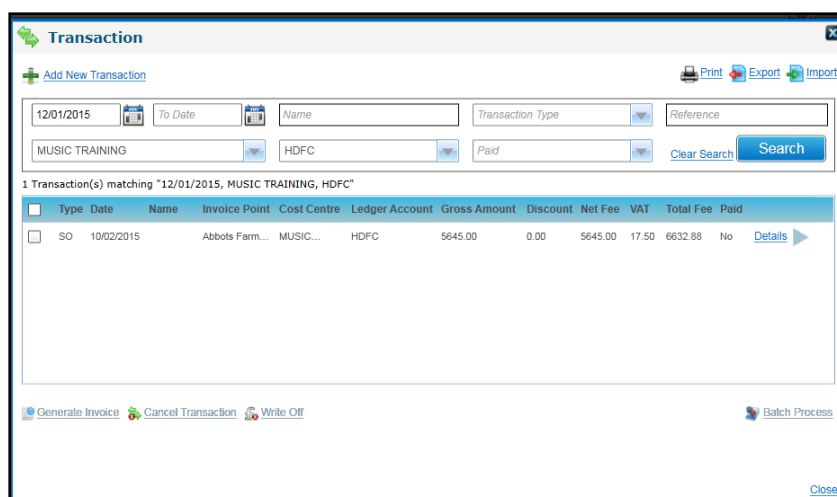
4. Select an **Invoice Point**.
5. Select a **Transaction Type** from the drop-down list.
6. Enter a **Description**.
7. Click the **Save** button.

Viewing Transactions Linked to an Instrument

1. Open the instrument inventory and select an instrument to display the details.
For more information, see [Viewing Instrument Inventory](#) on page 157.



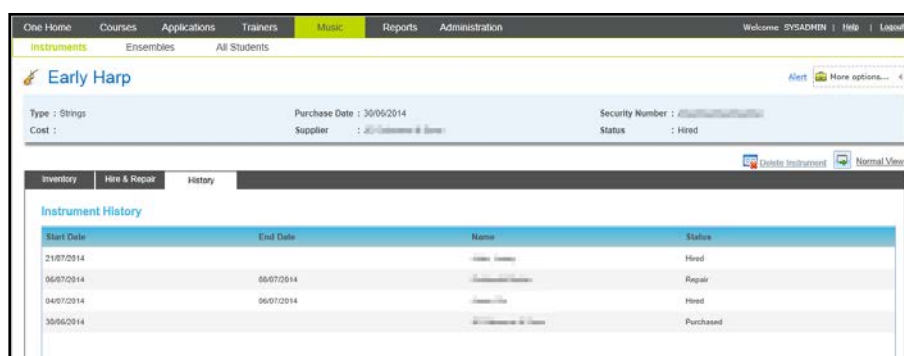
2. Click the **More Options | Billing** link to display the **Transaction** dialog.



Viewing Instrument History

The **History** tab displays a history of changes to the status of an instrument. This includes the dates when the instrument was purchased, hired or repaired and the name of the person, base, ensemble or organisation involved.

1. Open the instrument inventory and select an instrument to display the details.
For more information, see [Viewing Instrument Inventory](#) on page 157.
2. Select the **History** tab to display the **Instrument History** page.



Deleting an Instrument

An instrument record can be deleted if it is currently in stock.

1. Open the instrument inventory and select an instrument with a status of **In Stock**.
For more information, see [Viewing Instrument Inventory](#) on page 157.

The screenshot shows a web-based interface for instrument management. At the top, there are navigation tabs for 'Instruments', 'Ensembles', and 'All Students'. The main heading is 'Yamaha B Flat Clarinet'. Below this, a summary bar displays key information: Type: Brass, Cost: 25, Purchase Date: 01/07/2013, Supplier: JE Osbourne & Sons, Security Number: 1155, and Status: In Stock. To the right of this bar are 'Alert' and 'More options...' buttons. Below the summary bar are two buttons: 'Delete Instrument' (with a trash icon) and 'Normal View' (with a magnifying glass icon). The main content area is divided into three sections: 'Inventory Details', 'Purchase Details', and 'Disposal Details'. Each section contains several input fields and dropdown menus for data entry. A 'Memo' field is also present in the top right of the main content area.

2. Click the **Delete Instrument** button to display a confirmation message.
3. Click the **Yes** button to delete the instrument.

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