CAPITA

one

Training Manager v4

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Handbook

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01 | Introduction to Training Manager v4

Introduction

Training Manager v4 enables the Local Authority to administer its training courses. It is used to maintain course and application details including the duration, personnel, session details, venues and costs.

It also provides support for recording financial transactions, generating invoices and scheduling communications for applicants. Trainer information is maintained including personal details, list of courses conducted, observations, qualifications, subjects taught, training history and checks.

Applications for training courses made via the Citizen and Provider Portals are processed using Training Manager v4.

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

Using this Handbook

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

What's New in this Release

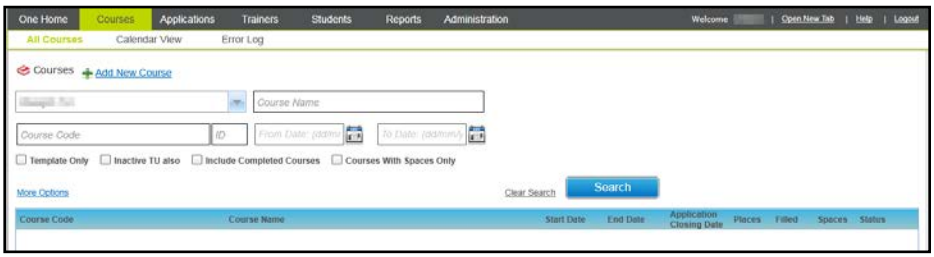
This handbook has been updated for the One Summer 2017 Release (3.63) with the following changes:

- SEN Status details are now added and updated on the **Special Needs** tab when viewing an application. For more information, see Editing Applicant Details (Student) on page *126*.

Overview of Training Manager v4

Training Manager v4 is accessed from the One v4 Online **Home** page.

Click the **Training Manager** button to display the **Courses** area.



***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.

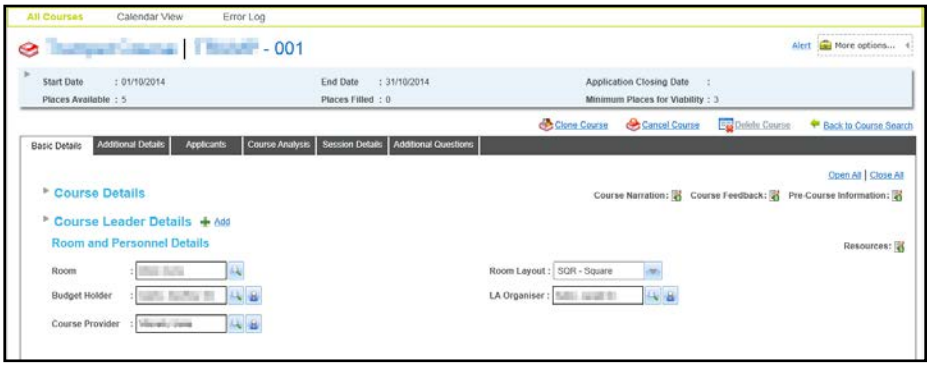
Click the **Normal View** button to display the search panel.

Multiple Tabs

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

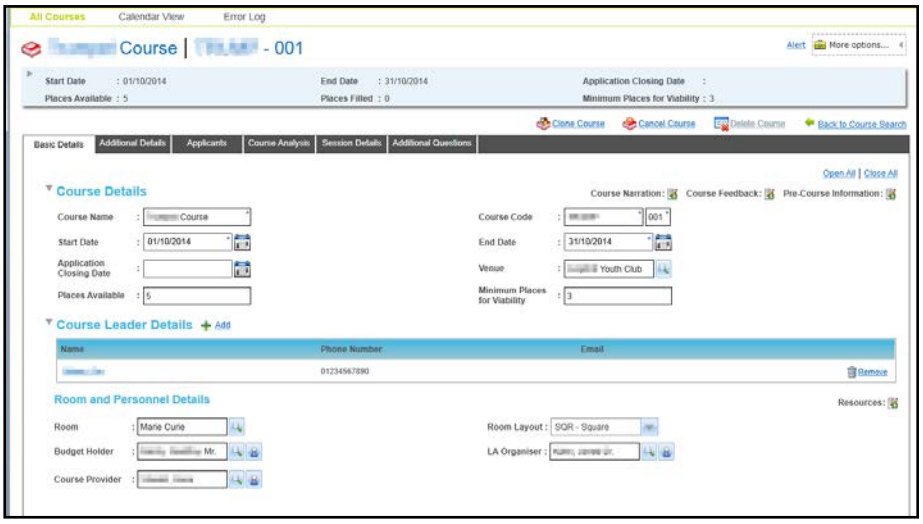
Collapsing and Expanding the panels

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.

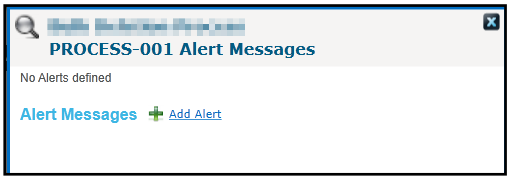
More Information:

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

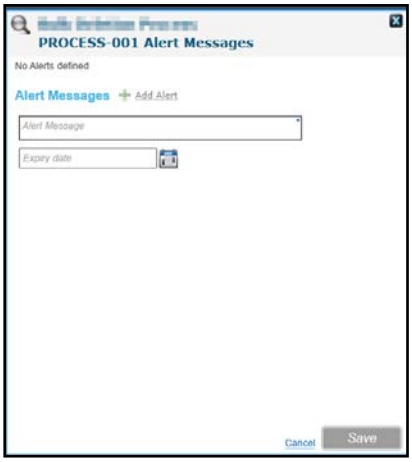
Defining an Alert

1. Select the required record.

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



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



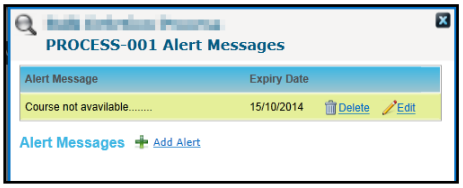
4. Enter an **Alert Message**.
5. If required, select an **Expiry Date**.
6. Click the **Save** button.

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

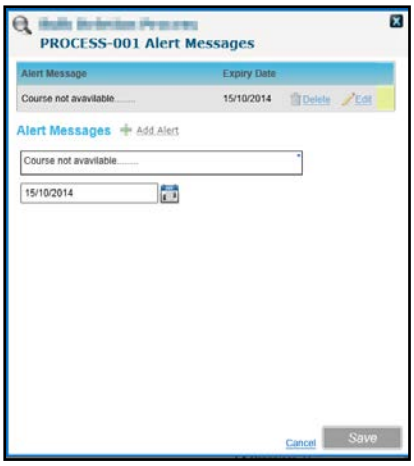
Editing an Alert

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.

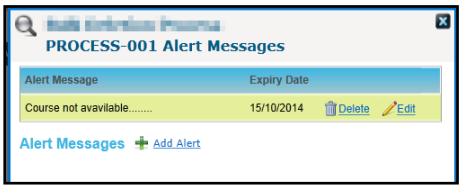


4. The **Alert Message** and **Expiry Date** can be edited.
5. Click the **Save** button.

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, 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:

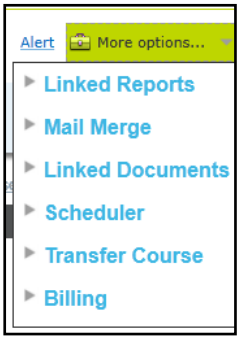
- RG_Online_Common_Reports

Managing Mail Merge

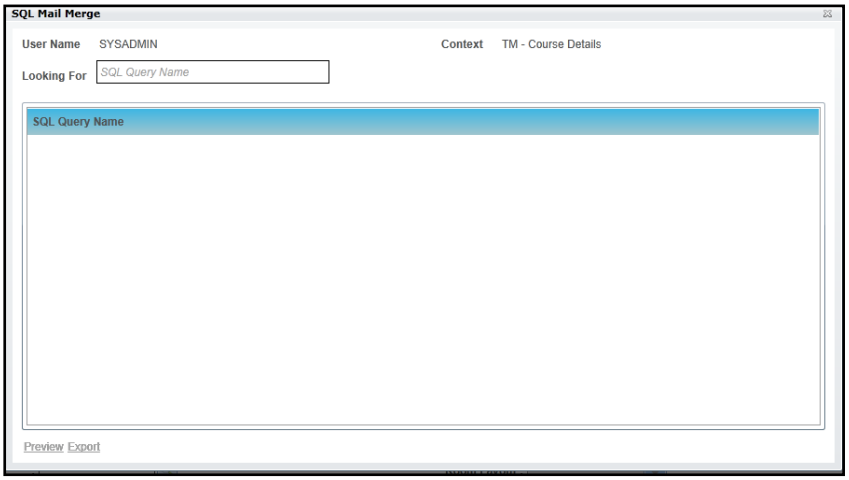
Mail Merge is enabled in most areas of Training Manager e.g. Courses, Applications and Trainers. Mail Merge creates a file of exported data on the basis of an SQL Select Query. This file can be imported into a Word document mail merge.

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****.*

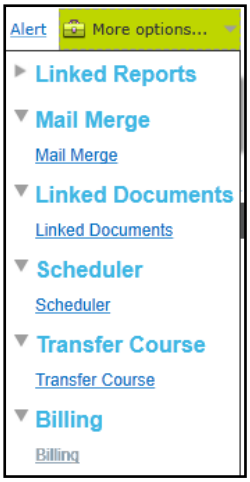
Managing Linked Documents

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

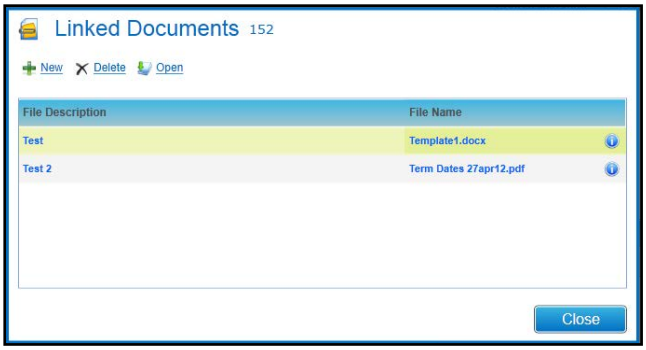
- Training units.
- Courses.
- Applications.
- Trainers.
- Instruments.
- Ensembles.
- Students.
- Invoice Points.
- Nominal Ledgers.

Viewing a Linked Document

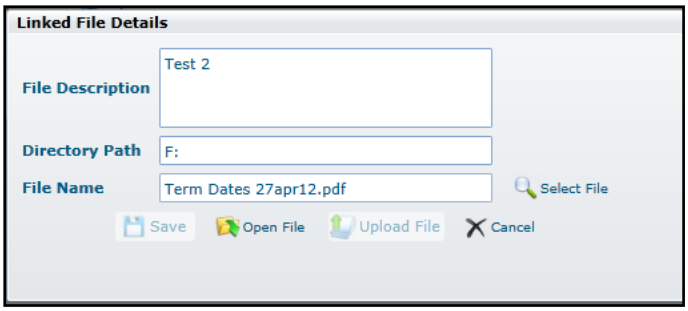
1. Search for the required entity and select it to view the details.
2. Click the **More options** button to display the drop-down list of options.



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



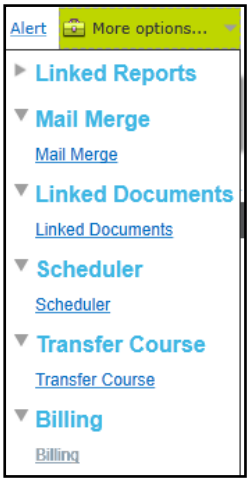
4. Select the required file and click the **Open** button to display the **Linked File Details** window.



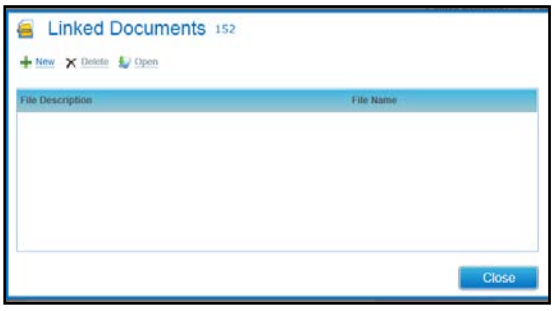
5. Click the **Open File** button.

Adding a New Linked Document

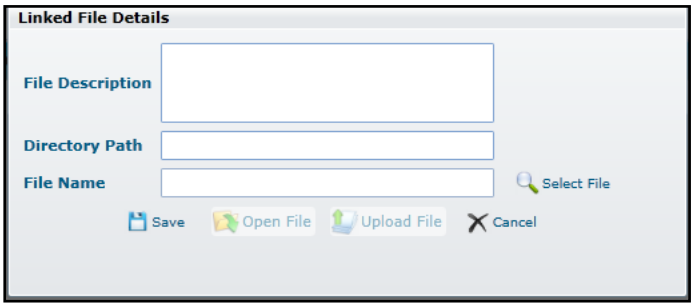
1. Search for the required entity and select it to view the details.
2. Click the **More options** button to display the drop-down list of options.



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 Training Manager, communications can be scheduled for applicants 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*.

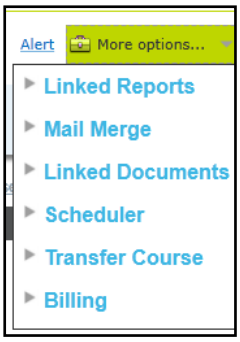
Alternatively, when scheduling a letter or SMS, selecting the **Email Also** check box sends an automatic email to each applicant with the selected **Application Status**. In this case, the email content is not editable. In the case of an SMS, the email and the SMS are sent at the same time and have 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 *59*.

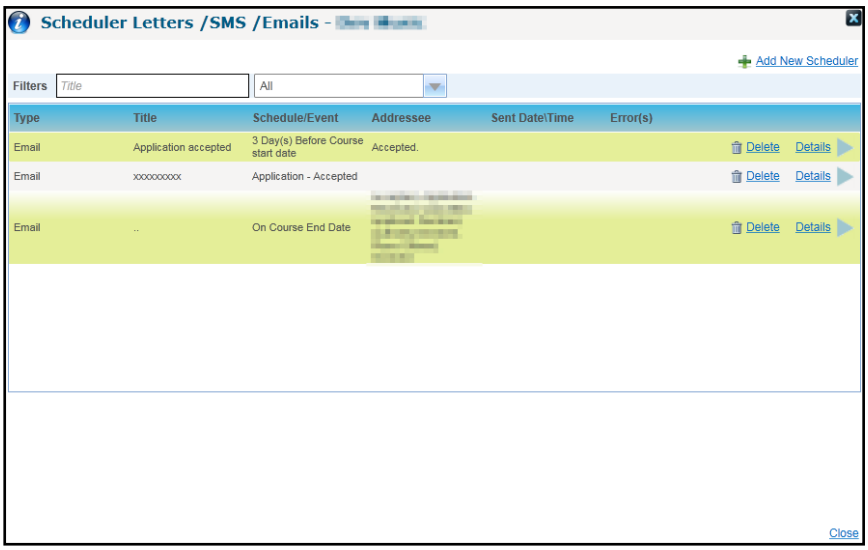
> ***NOTE:*** *If new applicants are added after the scheduled date, an email is sent to the new applicants only.*

Viewing the Scheduler

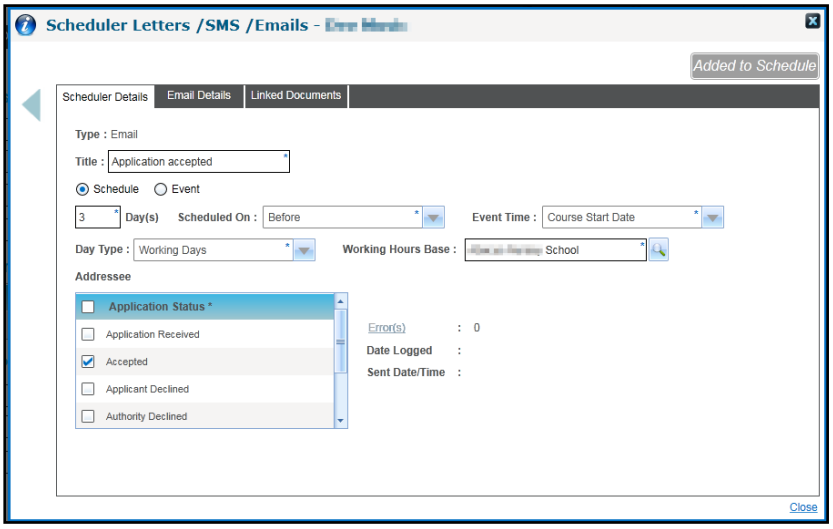
1. Search for a course using either the **All Courses** or **Calendar View** tab.
2. Select the required course to view the details.
3. Click the **More options** button to display the drop-down list of options.



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**.



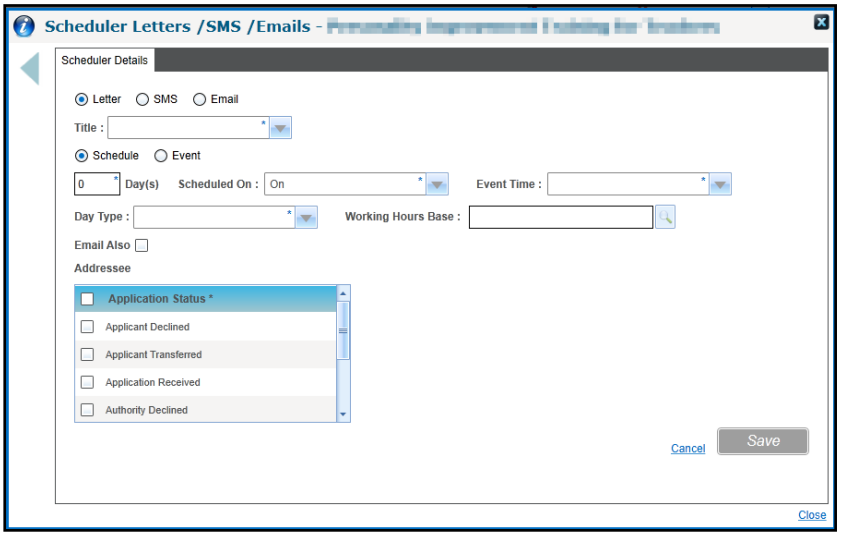
Adding a Scheduled Communication

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 *8.*

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 113*.

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.

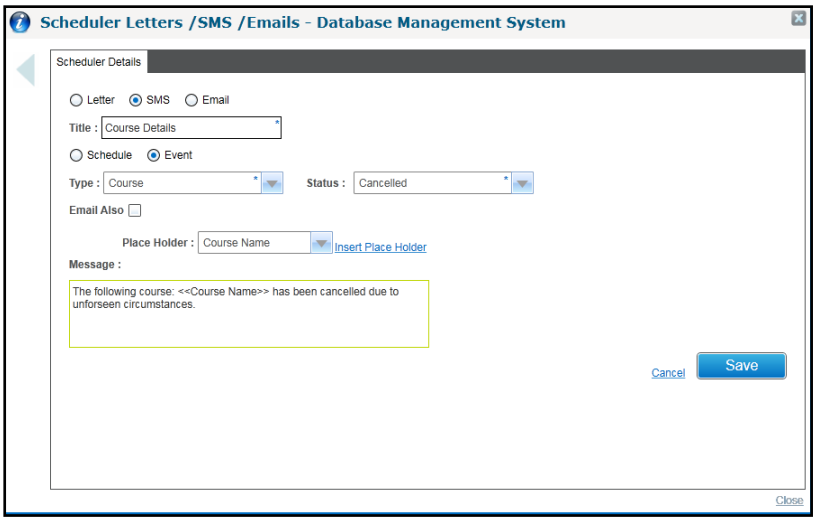
> ***NOTE:*** *Selecting the **Email Also** check box for a scheduled letter does not enable the **Email Details** tab. An automatic email is created when the letter is generated via the **Administration | Training Unit | Printing Pending** tab. For more information, see Using the Scheduler to Send an 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 Training Manager 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.
9. Click the **Finish and Add to Schedule** button.

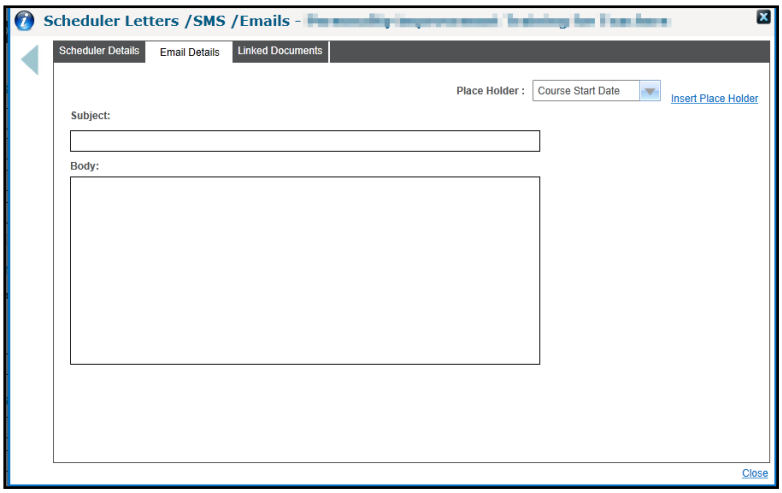
> ***NOTE:*** *Selecting the **Email Also** check box does not enable the **Email Details** tab. An email and an SMS are sent at the time of the scheduled event. Both have the same content. Alternatively, a more detailed email can be sent by setting up another scheduled communication for the same time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

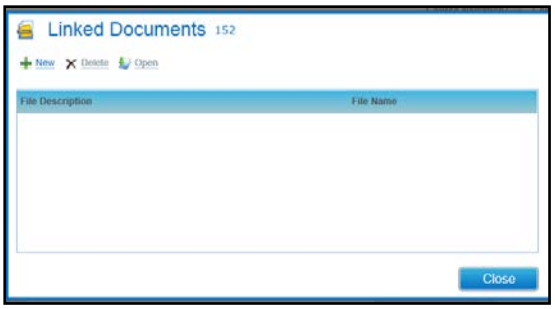
> ***NOTE:*** *The From email address for these scheduled communications must be configured in the CCSServer Config tool in the **Application Servers | Email Settings** panel using the field, **TM From Address for Email**. If this is not configured, the email will not be sent.*

1. Select the **Email Details** tab.



2. One or more place holders can be inserted into the body of the email:
   a. Select a **Place Holder** from the drop-down list.
   b. Click the **Insert Place Holder** button.
3. A **Subject** can be entered.
4. Enter text into the email **Body**.
5. Click the **Save** button.
6. 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.*



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

   For more information, see Using the Scheduler to Send an Email on page *8*

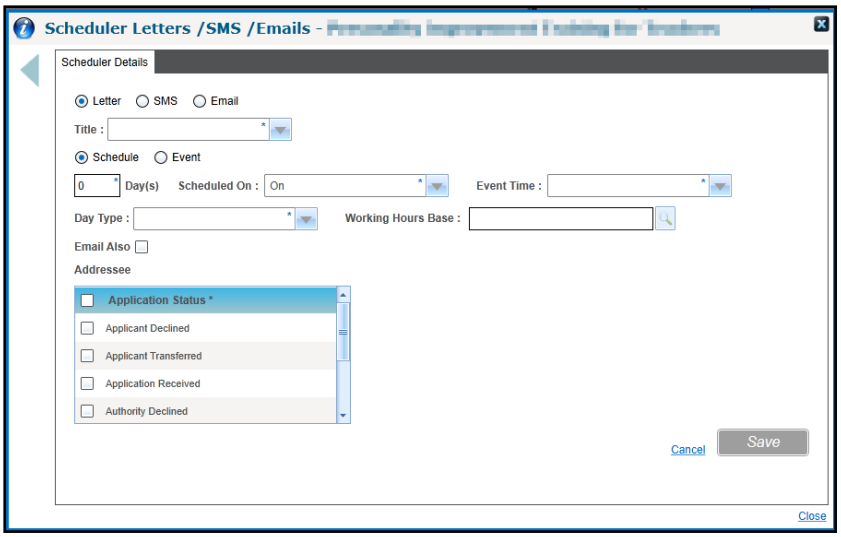
Scheduling a Letter

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 *8.*
2. Click the **Add New Scheduler** button to display the **Scheduler Details** page.



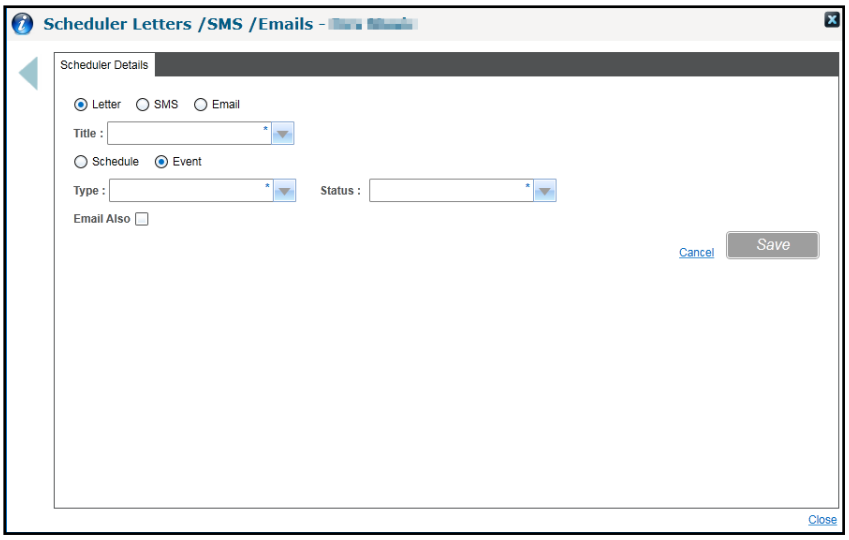
3. Click the radio button to select **Letter**.
4. Select the required **Title** from the drop-down list of letter defaults.
5. Select the **Schedule** or **Event** radio button.
6. Enter the remaining information for the schedule or event.
7. If required, select the **Email Also** check box to send 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

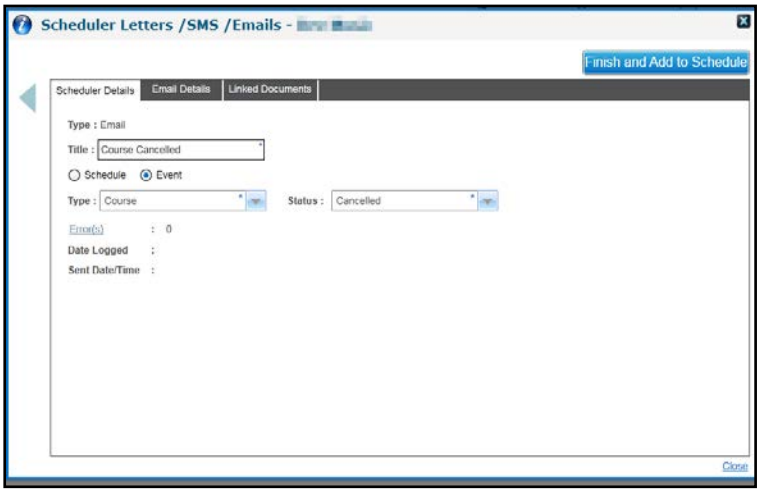
A scheduled communication can relate to an event such as cancelling a course or updating the status of an application, e.g. an email is sent to confirm a place on a course when the status is updated to accepted.

1. Open the scheduler for a course.

   For more information, see Viewing the Scheduler on page *8*.
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 Training Manager Handbook,
One Training Manager Courses Provider Portal Handbook and
One Training Manager Courses Citizen Portal 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 Training Manager

Introduction to System Administration

Before using Training Manager 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.

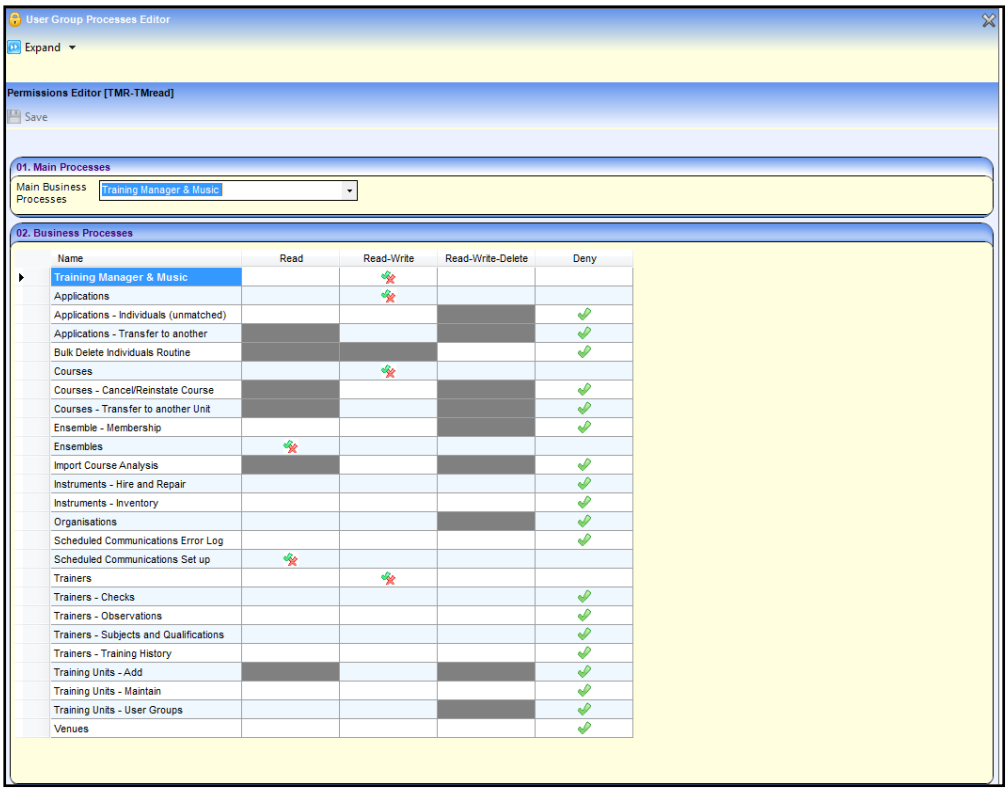
Setting up Permissions

> ***NOTE:*** *For detailed information regarding the permissions required, refer to the Advice to LAs Migrating Training Manager 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 Training Manager 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:



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

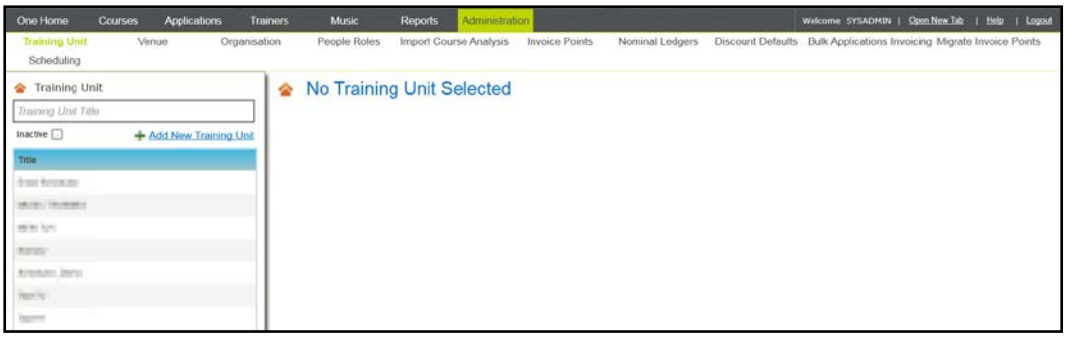
Training units are business units within the local authority that are responsible for managing their own training courses.

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

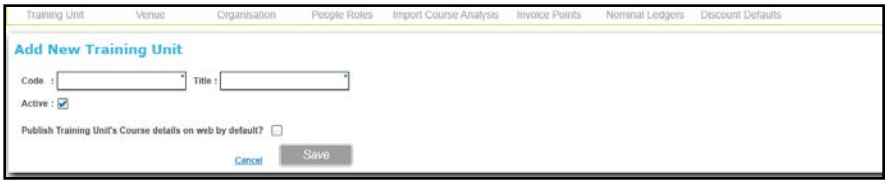
On saving a new training unit, One automatically creates a user group with the same name populated with the user who created the training unit and the System Administrator. This group is automatically granted read-write permissions to the main business process, **Training Manager and Music**. Only users in that user group or any other group assigned to the training unit, can access the training unit and courses attached to it.

Adding a Training Unit

1. Select the **Administration** area.
2. Ensure that the **Training Unit** tab is selected.



3. Click the **Add New Training Unit** button to display the **Add New Training Unit** page.



4. Enter a unique **Code** for the training unit.
5. Enter a **Title** for the training unit.
6. If the training unit is not active, de-select the **Active** check box.
7. If your Local Authority is using Training Manager Online, you can select the **Publish Training Unit's Course details on web by default** check box.
8. Click the **Save** button.

A user group is created with the same code. It is linked to the training unit and only users in that group or another group assigned to the training unit, can access the training unit.

> ***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.*

9. If required, enter the following **Training Unit Defaults**. The training unit defaults pre-populate the information on any courses created in the future under this training unit. These can be overwritten when individual course details are set up:
   a. Enter a default **Course Start Time** for all courses operated by the training unit.
   b. Enter a default **Course End Time** for all courses operated by the training unit.
   c. To confirm acceptance of a place when an application is received, select the **Infer Acceptance from Receipt of Application** check box.
   d. **Invoice Prefix** is automatically set to the first 4 characters of the training unit code. If required, enter a different value.
   e. If required, click the browse button to display the **Select Invoice Report** window and select an **Invoice Report**.

> ***NOTE:*** *If your LA wishes to print invoices, select an Invoice Report. This is a Crystal report that has already been set up via the* ***Reports*** *focus. It needs to be set up with a parameter that expects the passing of the field IP_TRANSACTION.PRINT_ID. A standard report is provided as a template*

f. Click the **Save** button.

10. **Letter Defaults** are used to produce standard letters:

a. Click the **Add** button.

b. Enter a **Title**.

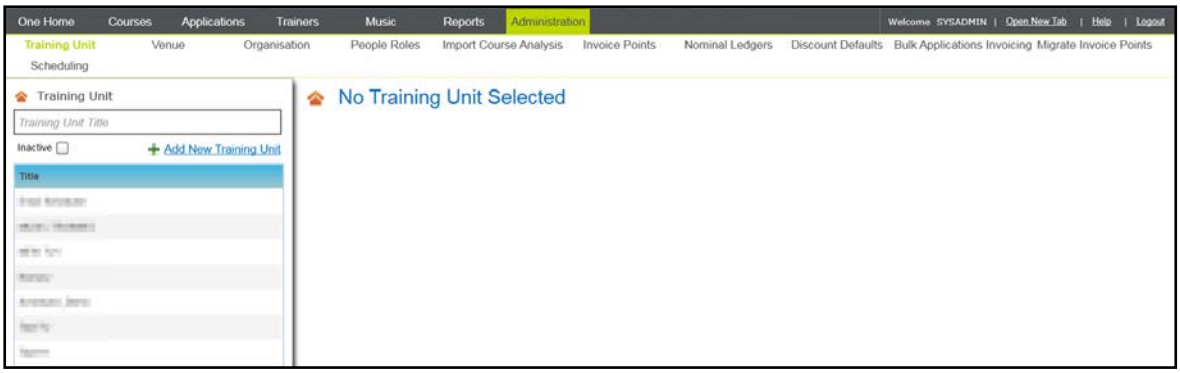
c. Select a **Report Letter** from the browse of standard report letters.

d. Click the **Save** button.

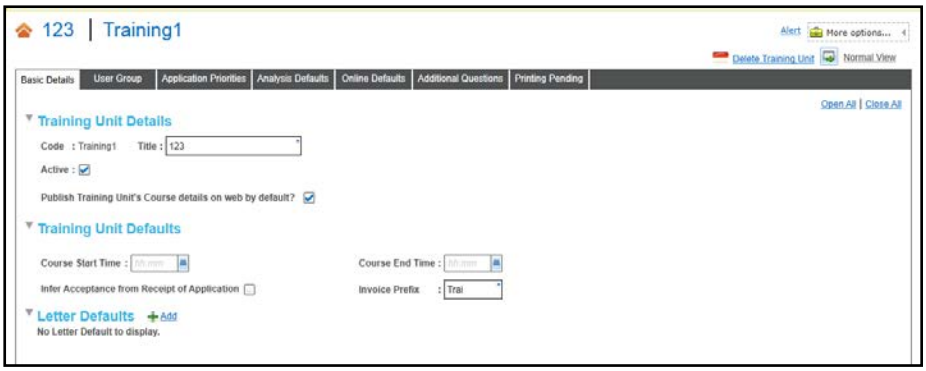
> ***NOTE:*** *The* ***Letter Defaults*** *panel is used to set up Crystal reports that can be selected when defining a scheduled letter (e.g. an acceptance letter) via the scheduler for the training unit, template or course. These Crystal reports need to have already been defined via the* ***Reports*** *focus as a Linked Report before they can be set up as a letter default. For application letters (e.g. acceptance) they need to be set up to expect the parameter IN_PLACES.PLACE_ID which is the unique application identifier.*

Viewing a Training Unit

1. Select the **Administration** area.
2. Select the **Training Unit** tab to display 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.

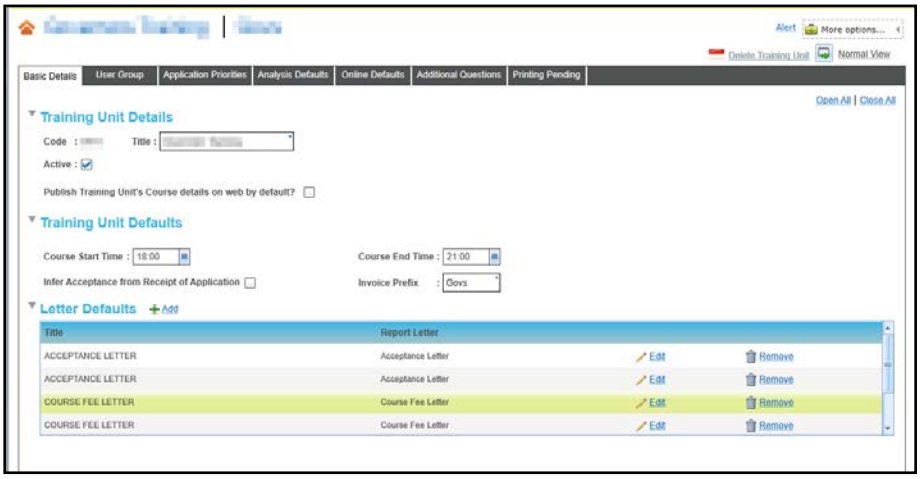


Editing a Training Unit's Basic Details

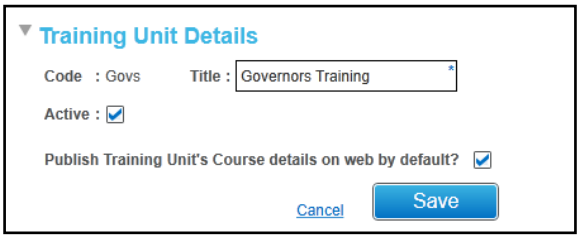
For more information, please refer to Adding a Training Unit *on page 16*.

1. Select the required Training Unit.

   For more information, see Viewing a Training Unit *on page 18.*



2. If required, edit the following details on the **Training Unit Details** panel:
   - **Title**.
   - **Active** check box.
   - **Publish Training Unit's Course Details** on web by default.



3. Click the **Save** button.
4. 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.*

5. Click the **Save** button.
6. 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:
   a. Enter a **Title**.
   b. Select a **Report Letter** from the browse of standard report letters.
   c. Click the **Save** button.

7. If required, click the **Edit** button to update a letter default:
   a. Enter a **Title**.
   b. Select a **Report Letter** from the browse of standard report letters.
   c. Click the **Save** button.
8. If required, click the **Remove** button to delete a letter default.

Deleting a Training Unit

A training unit can only be deleted if there are no courses, invoice points or ledger accounts associated with it.

> ***NOTE:*** *if there has been a reorganisation of training units and you wish to preserve the history of courses and applications associated with old training units, a training unit can be made inactive instead.*

1. Select the required training unit to display the details.

   For more information, see Viewing a Training Unit *on page 18*.
2. Click the **Delete Training Unit** button.

   A confirmation message is displayed.
3. Click the **Yes** button to complete the deletion.

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.

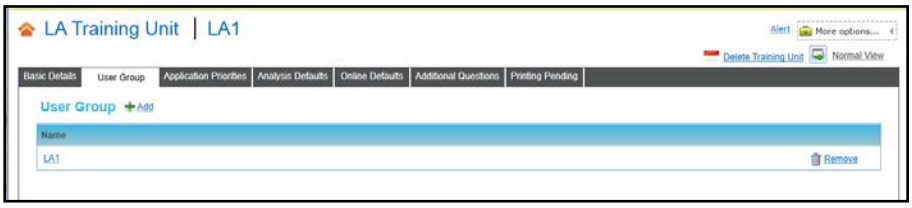
> ***NOTE:*** *When a new user group is created, it is automatically granted read-write access to the* ***Training Manager and Music*** *business process. No other permission areas are automatically granted, so the System Administrator should consider what other permissions are required, e.g. under* ***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:

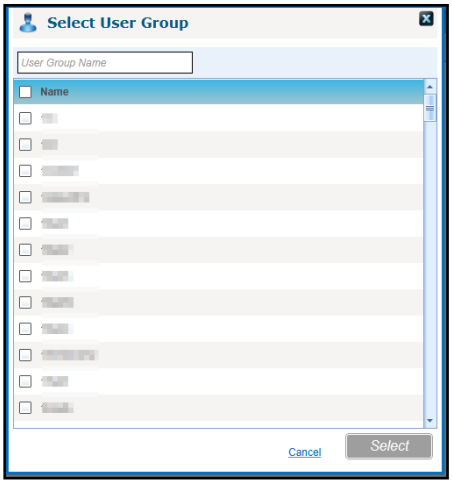
1. Select the required training unit to display the details.

   For more information, see Viewing a Training Unit *on page 18*.

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 18*.

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.

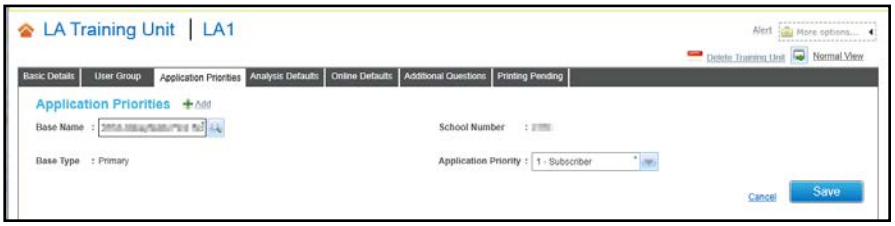
> ***NOTE:*** *Application priorities values are configured by a locally configurable Application Priorities lookup that can be managed via* ***v4 Client | Tools | Lookups*** *(Table ID: 0402).*

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 18.*
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 113*.
5. Select an **Application Priority** from the drop-down list.



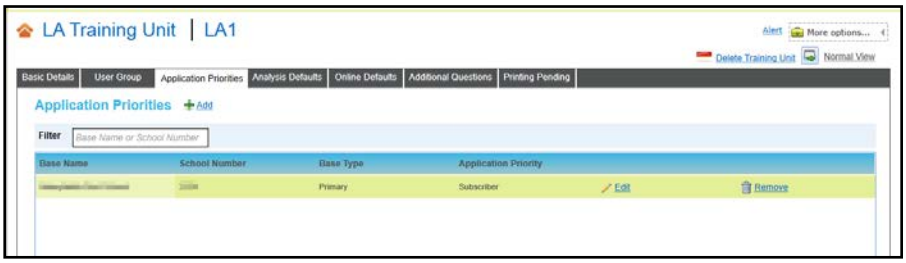
6. Click the **Save** button.

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 18.*
2. Select the **Application Priorities** tab.



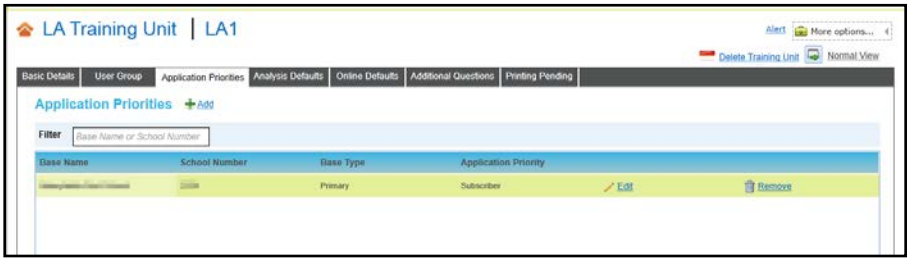
3. Click the **Edit** button.
4. Select an **Application Priority** from the drop-down list.
5. Click the **Save** button.

Removing Application Priorities

1. Select a training unit to display the details.

For more information, see Viewing a Training Unit *on page 18.*

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.

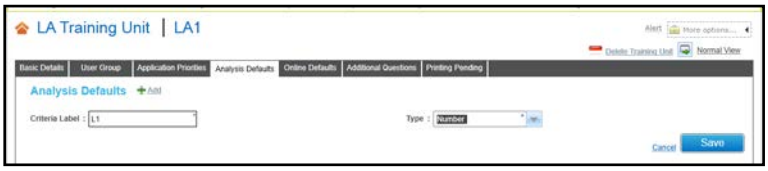
Adding Analysis Defaults

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 18.*

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.

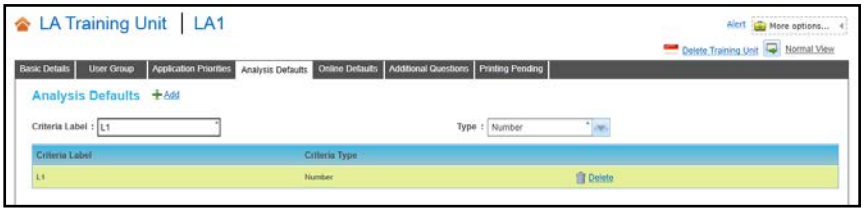
Deleting Analysis Defaults

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 18.*

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.

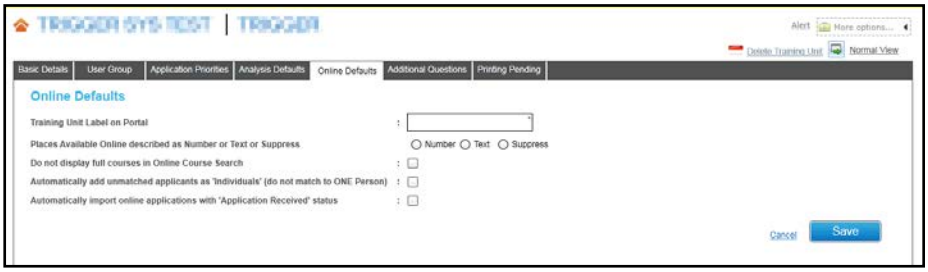
Editing Online Defaults

Online defaults are used by the Courses application on the Citizen and Provider Portals if the Local Authority has a licence for Training Manager Online. They also determine the way in which online applications are processed via the **Applications | Incoming Applications** tab. These defaults can be updated as follows:

1. Select a training unit to display the details.

   For more information, see Viewing a Training Unit *on page 18.*

2. Select the **Online Defaults** tab.



3. If required, enter a **Training Unit Label on Portal** to display a different label for this training unit on the portal.
4. Select the required option for how available places are described on the portals. This can either be a **Number**, a **Text** description or **Suppress** (do not display).

   If the **Text** option is selected, the text displayed depends on the number of available places as follows:

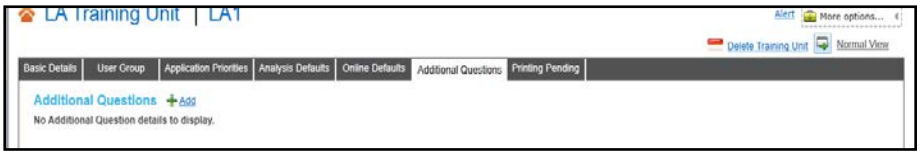
   - **A few places remaining** (less than six).
   - **Places Available** (six or more).
   - **Places Subject to Availability** (no places left and Local Authority has selected to display full courses)

5. If required, select or deselect the following check boxes:
   - **Do not display full courses in Online Courses Search:** select this check box if you do not want to display courses on the portals if there are no available places.
   - **Automatically add unmatched applicants as Individuals:** select this check box to add unmatched applicants as a new individual without manually matching them.
   - **Always import online applications with Application Received status:** select this check box to automatically import,with a status of Application Received, any application where the applicant is an existing person in One or has been manually matched.
6. Click the **Save** button.

Adding Additional Questions for a Training Unit

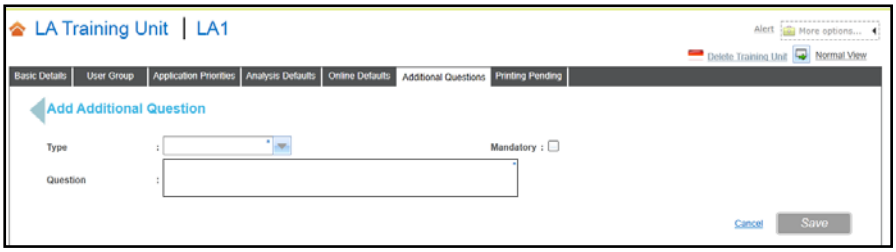
Additional questions that you want to ask course applicants can be defined for a training unit. They will be inherited by any courses or course templates created for the training unit.

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

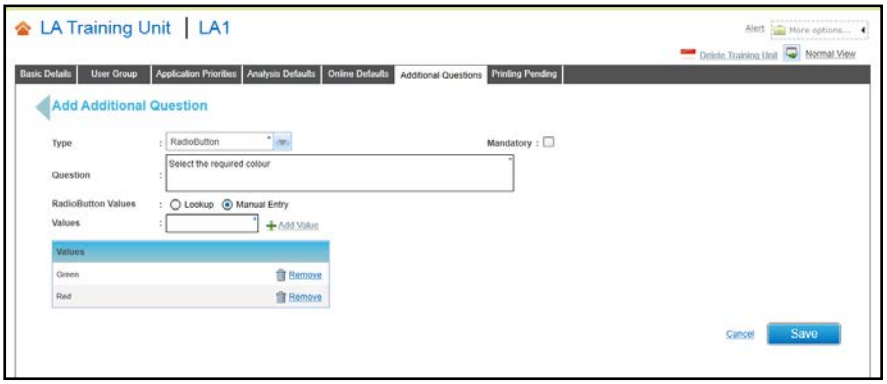


1. Select a training unit to display the details.

   For more information, see Viewing a Training Unit *on page 18.*
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:



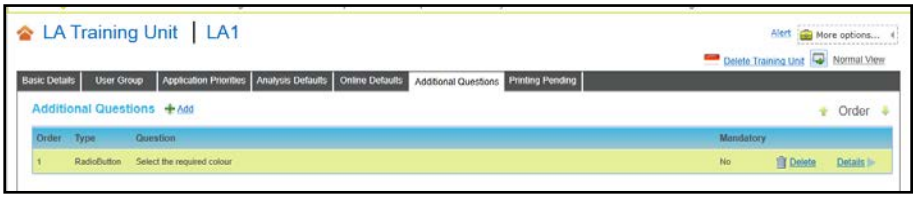
8. Click the **Save** button.

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 18.*
2. Select the **Additional Questions** tab.



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.

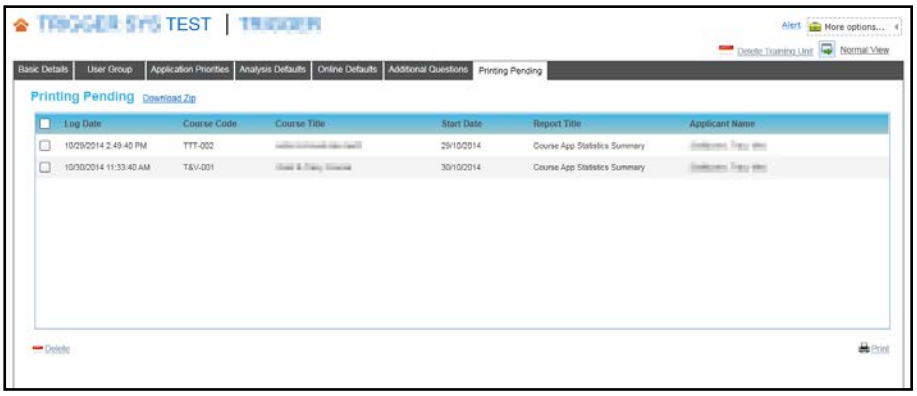
Managing Pending Prints

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 18.*
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.

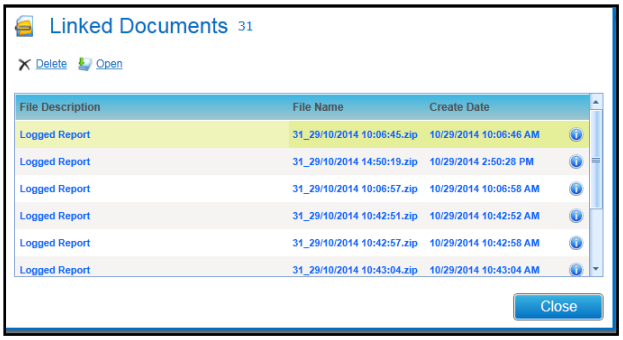
   An error message is displayed if the maximum number of items is exceeded.

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

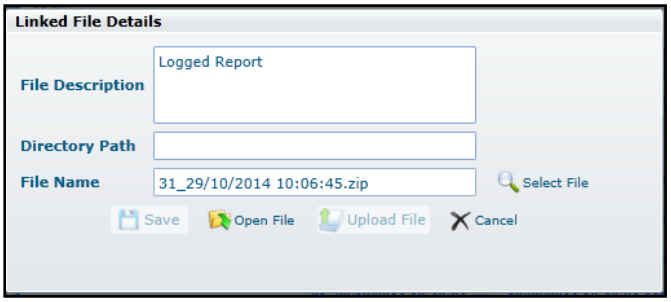
Printing the Letters

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.

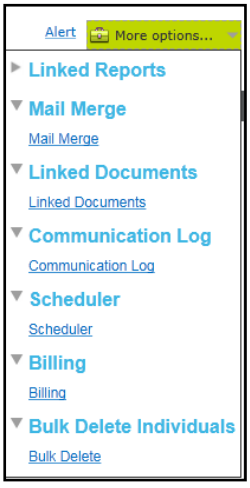
   The saved file can be unzipped to print the individual letters.

Bulk Deletion of Individuals

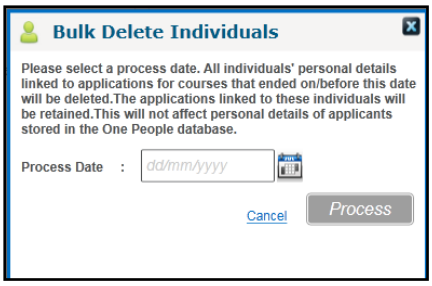
Individuals are set up when you do not want to maintain a record of the applicant in the One database. Since no linkages are maintained, this can create multiple duplicate records for the same person.

These records can be deleted as follows:

1. Select a training unit to display the details. For more information, see Viewing a Training Unit *on page 18.*
2. Click the **More Options** button.



3. Select the **Bulk Delete** link.



4. Select a **Process Date**.
5. Click the **Process** button.

   The records of individuals linked to courses that ended on or before the selected **Process Date** are deleted. Details of applications linked to these individuals are retained.

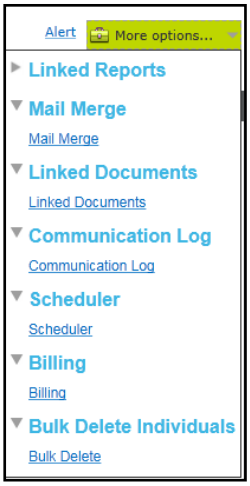
Managing a Training Unit's Communication Log

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.

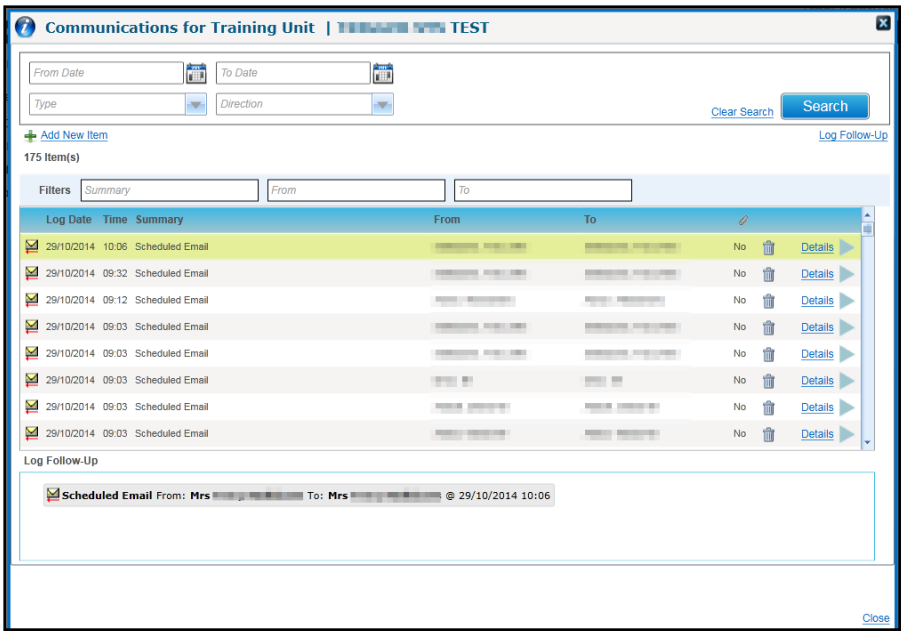
Viewing the Communication Log

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 18.*
2. Click the **More Options** button.

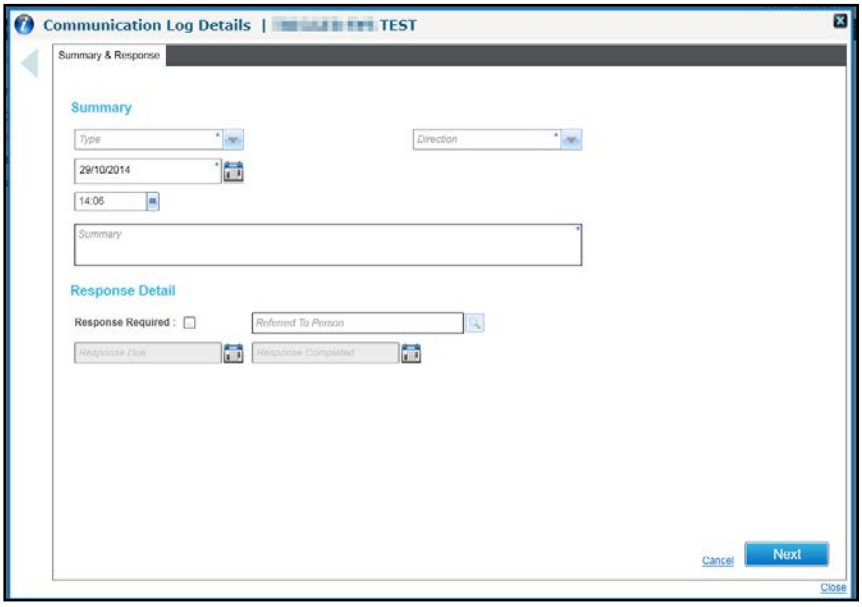


3. Click the **Communication Log** link to display the **Communications for Training Unit** window.

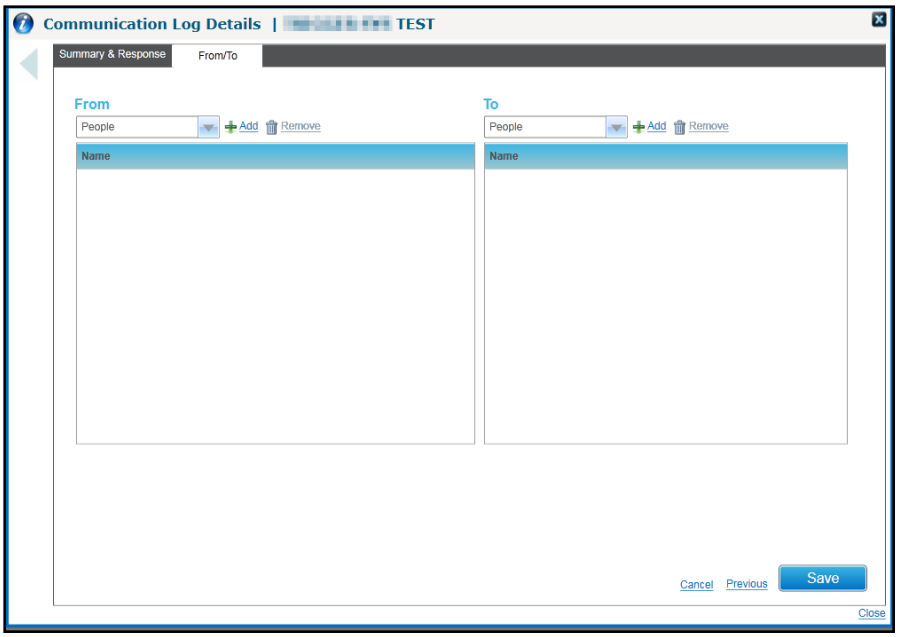


Adding a New Item to the Communication Log

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



2. Select a **Type** from the drop-down list.
3. Select a **Direction** from the drop-down list.
4. Select a **Log Date** and **Time**, if different from the current date and time.
5. Enter a **Summary**.
6. If required, select the **Response Required** check box and select a **Referred To Person**.
7. 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.

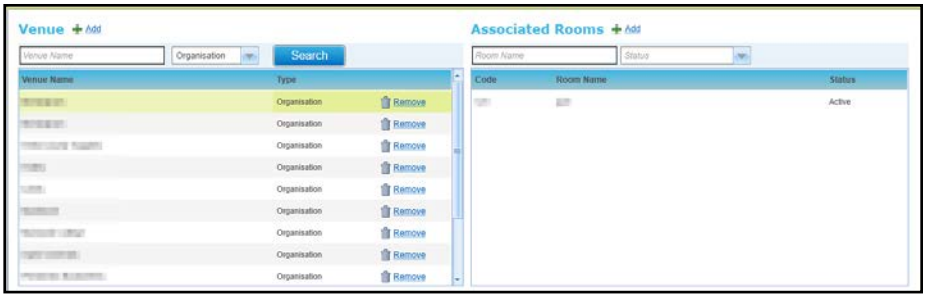
Setting Up and Maintaining Venues

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

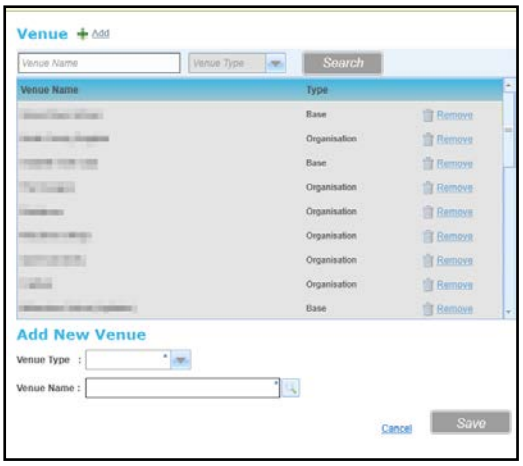
> ***NOTE:*** *A new venue can be added on an ad hoc basis when searching for a venue during the input of course details.*

Setting up a New Venue

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



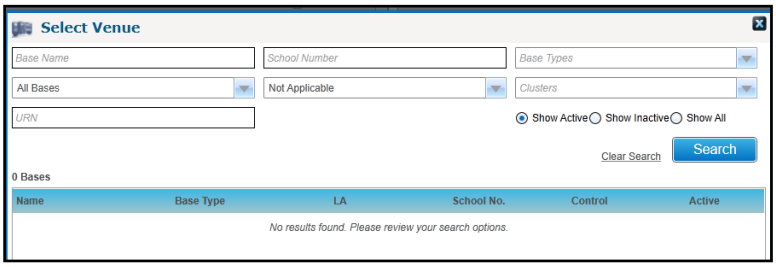
3. On the **Venue** panel, click the **Add** button to display the **Add New Venue** panel.



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

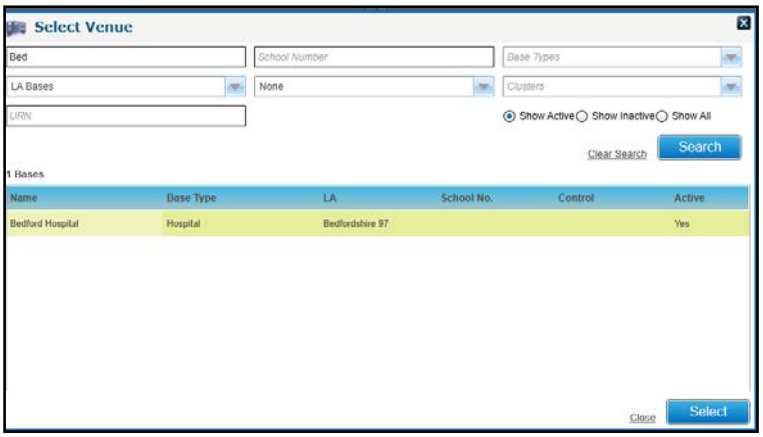
   If the **Venue Type** is **Base**:

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

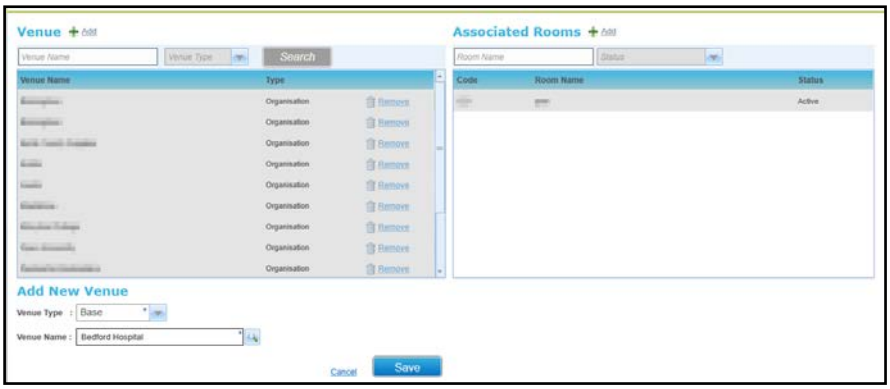


   b. Enter the required search criteria.

   c. Click the **Search** button.



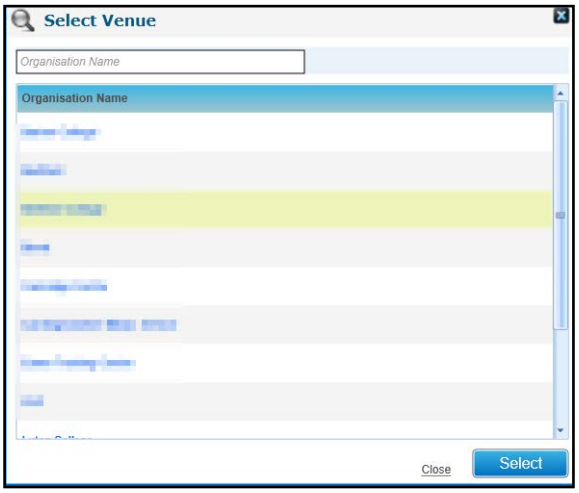
   d. Select the required venue and click the **Select** button.



e. Click the **Save** button.

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

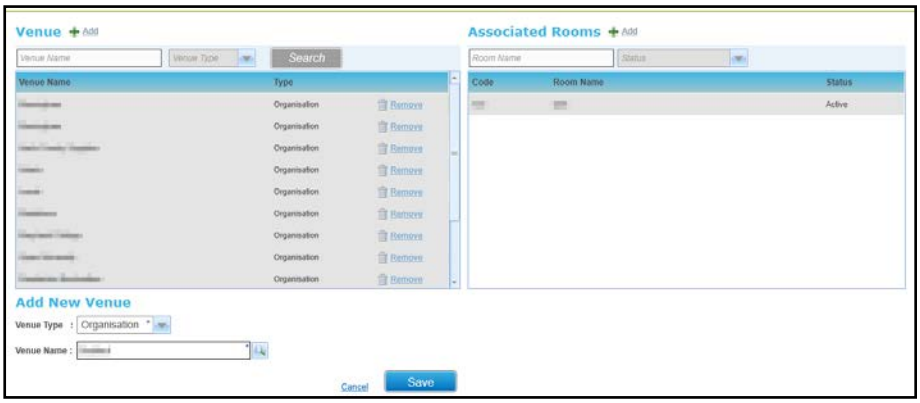
a. Click the **Venue Name** browse button to display the **Select Venue** dialog:



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 34.

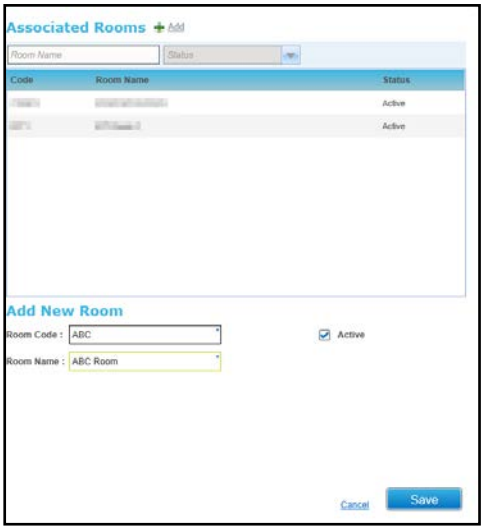
Adding a Room to a Venue

1. Open the list of venues.

   For more information, see Viewing a List of Venues *on page 34.*

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.

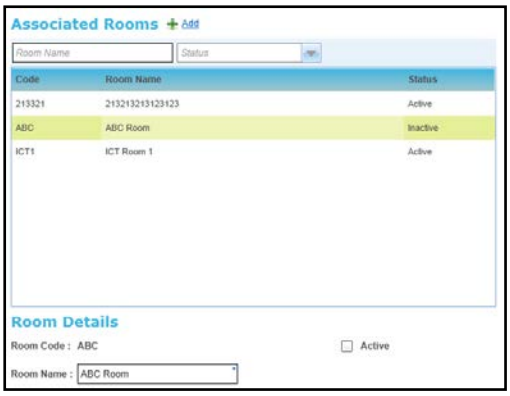
Making a Room Inactive (Unavailable)

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 34.*

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.



Viewing a List of Venues

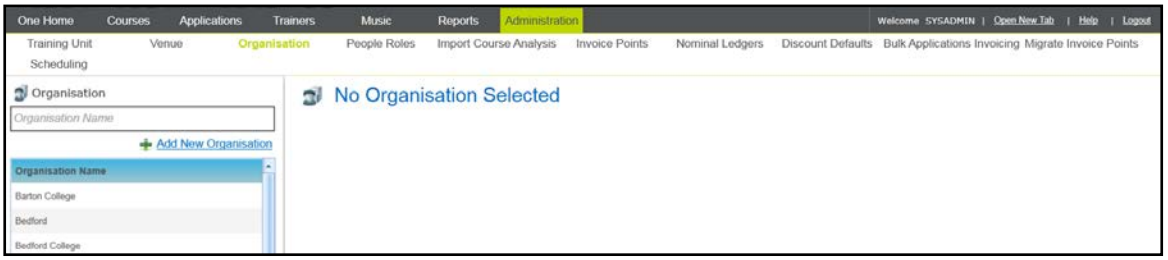
1. Select the **Administration** area.
2. Select the **Venue** tab to display a list of all available venues.
3. If required, enter a full or partial **Venue Name** or select a **Venue Type** from the drop-down list.
4. Click the **Search** button to display matching **Venues.**
5. Select a venue to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

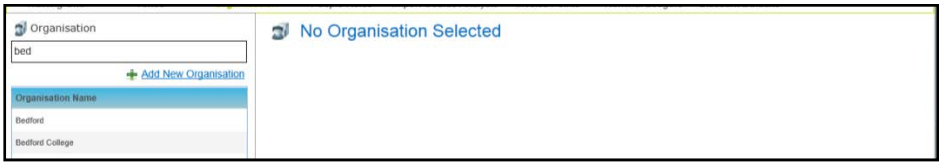


3. Click the **Add New Organisation** button to display the **Organisation** dialog.

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 37*.
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 35*.
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 37*.
   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 35*.

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 37*.

3. Select the required person to display them on the **Contact Details** panel.

Removing Contact Details for an Organisation

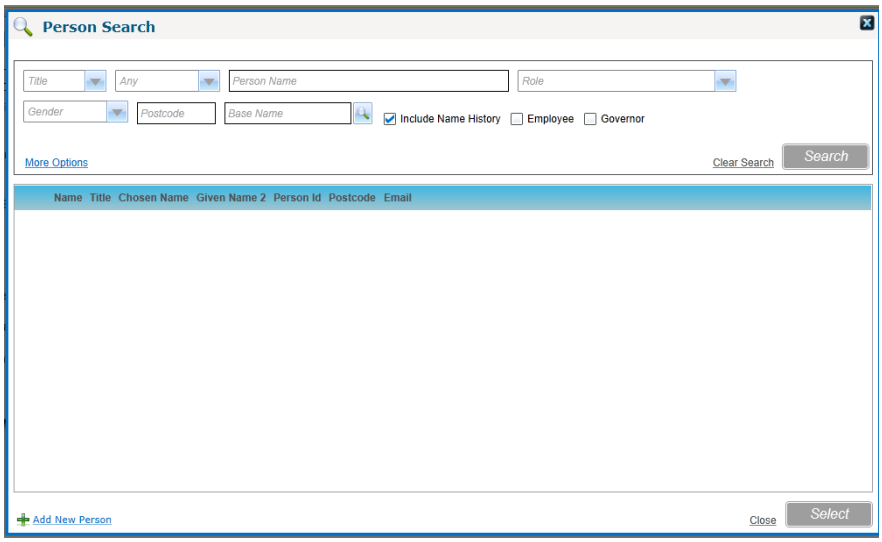
1. Select the required organisation.

   For more information see Viewing Details of an Organisation *on page 35*.

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

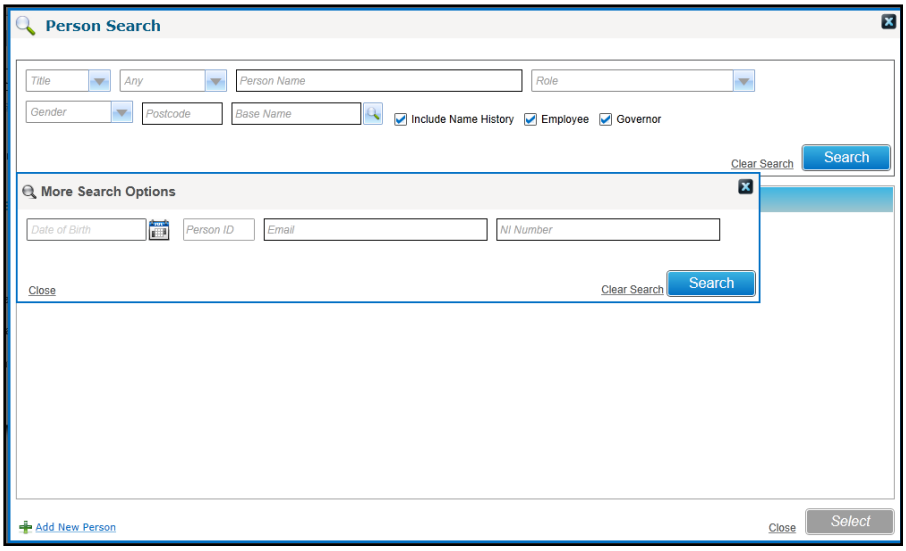
The **Person Search** dialog is used to find person details stored on the One database.



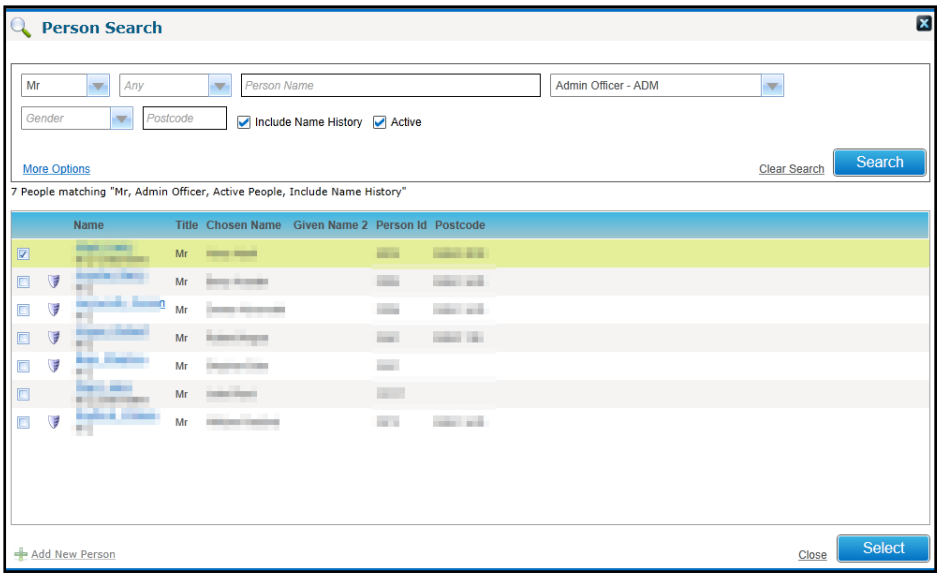
1. Enter search criteria as required.

> ***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.



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.*

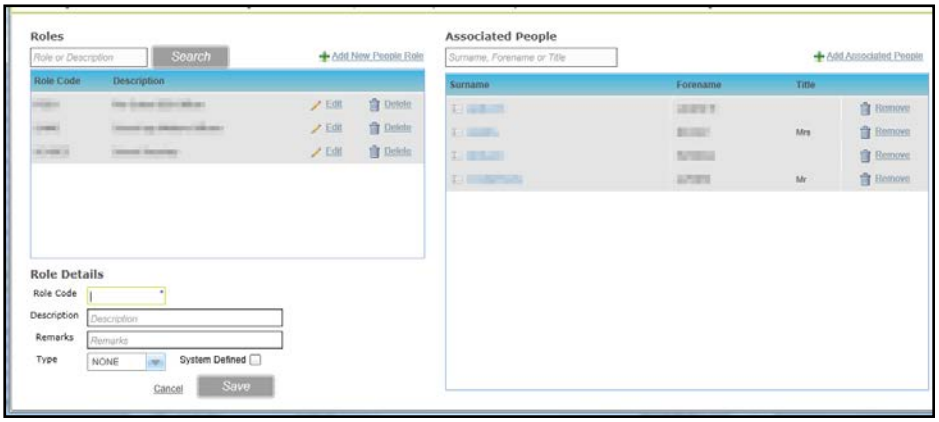
4. Click the **Select** button.

Maintaining People and Roles

The **People Roles** area enables you to maintain the details of roles used in Training Manager 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.



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.

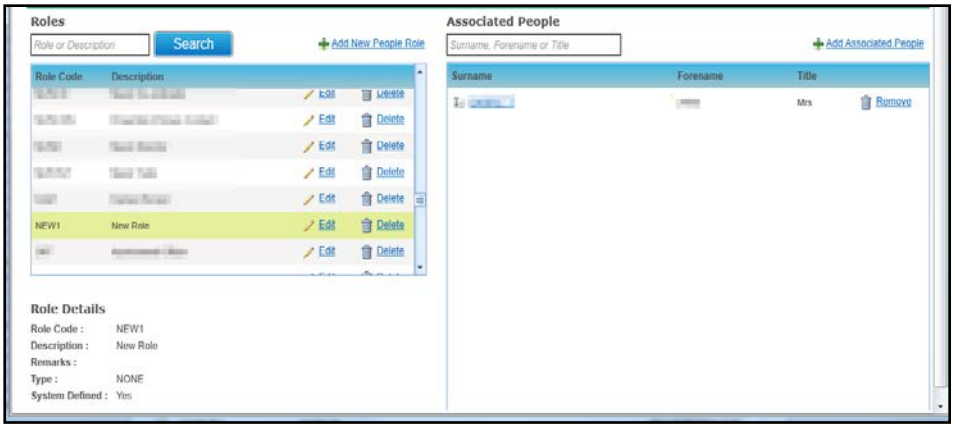
   For more information, see Viewing Roles and Associated People *on page 40*.
2. Click the **Delete** button to display a confirmation message.
3. Click the **OK** button to delete the role.

Adding a New Person to a Role

1. Select the required role.

   For more information, see Viewing Roles and Associated People *on page 40*.
2. Click the **Add Associated People** button to display the **Person Search** dialog.
3. Search for the required person and click the **Select** button.

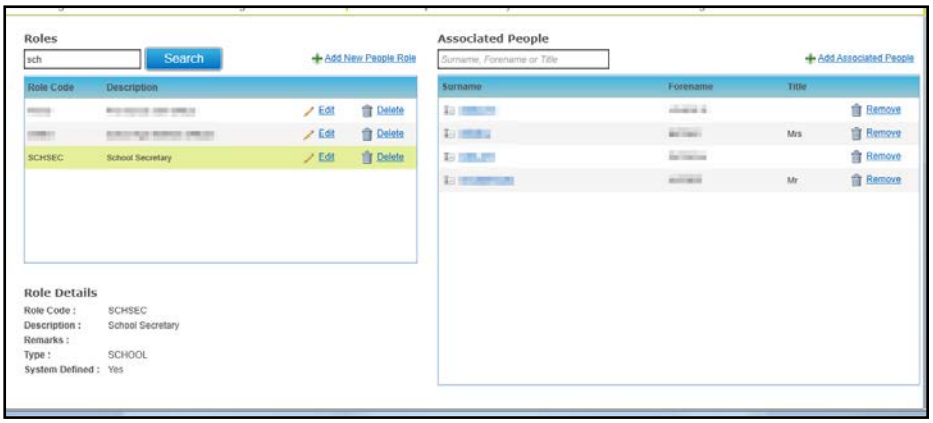
   For more information, see Selecting a Person using Person Search *on page 37.*



Removing a Person from a Role

1. Select the required role.

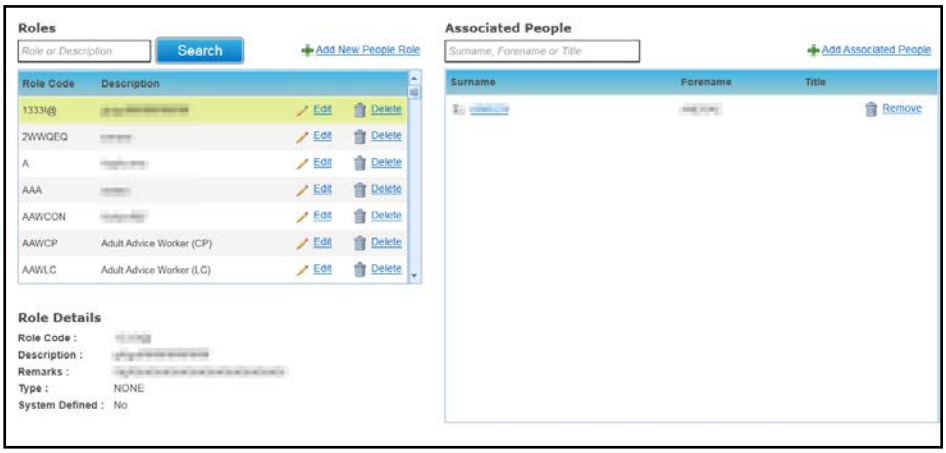
   For more information, see Viewing Roles and Associated People *on page 40*.



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**.



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**.

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.

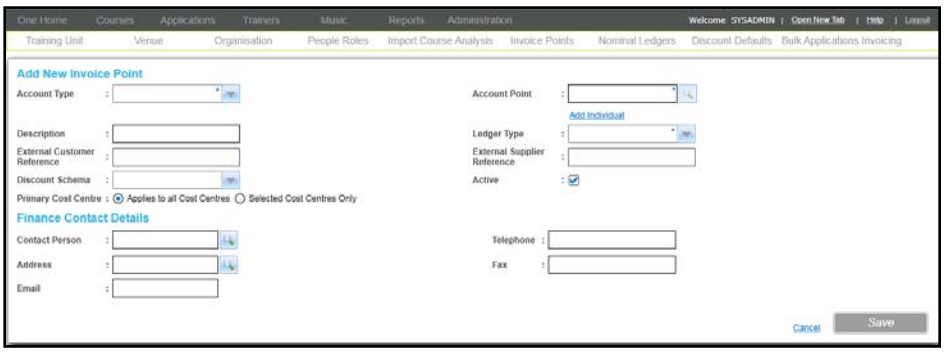
Maintaining Invoice Accounts

Supplier and customer invoice accounts are maintained via the **Invoice Points** tab page. Customer accounts are for people or individuals, schools, governing bodies 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 training courses.

> ***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.

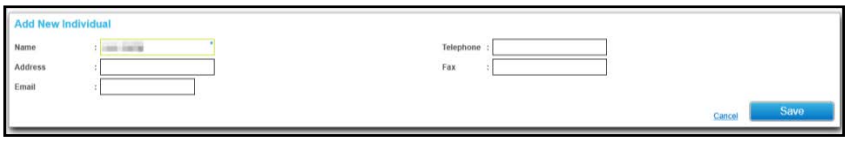
Entering Invoice Point Details for an Individual Account

Individuals can be set up when you do not want to maintain a record of the applicant in the One database.

> ***NOTE:*** *As no linkages are maintained, setting up an* ***Invoice Point*** *for an* ***Individual*** *might create multiple duplicate records for the same person.*

If the **Account Type** is **Individual**, the **Account Point** is added via the **Add New Individual** screen:

1. Click the **Add Individual** button to display the **Add New Individual** screen.



On the **Add New Individual** dialog:

a. Enter the **Name** of the individual.
b. Enter contact details as required.
c. Click the **Save** button.

2. Select a **Ledger Type** from the drop-down list.

   For more information, see Selecting a Ledger Type *on page 43*.
3. If required, enter an **External Customer Reference** or **External Supplier Reference** and select a **Discount Schema**.

   For more information, see Managing Discounts *on page 46*.
4. 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 more information, see Adding Cost Centre Details on page *44.*

Entering Invoice Point Details

For account types such as a Base, Governing Body, Provider, Employee or Organisation, 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 43*.
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 *44.*

> ***NOTE:*** *There is a hierarchy of discounts that are applied.*
> *For more information, see* *Managing Discounts* on page 46.

Entering Finance Contact Details

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

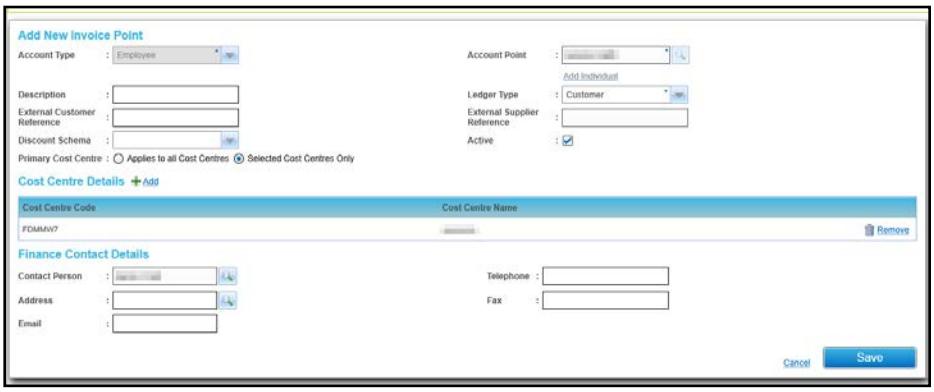
Finance contact details can be entered as follows:

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 37*.

   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 45*.
3. Enter a **Telephone number**, **Fax number** and **Email** address.
4. Click the **Save** button.



Selecting a Ledger Type

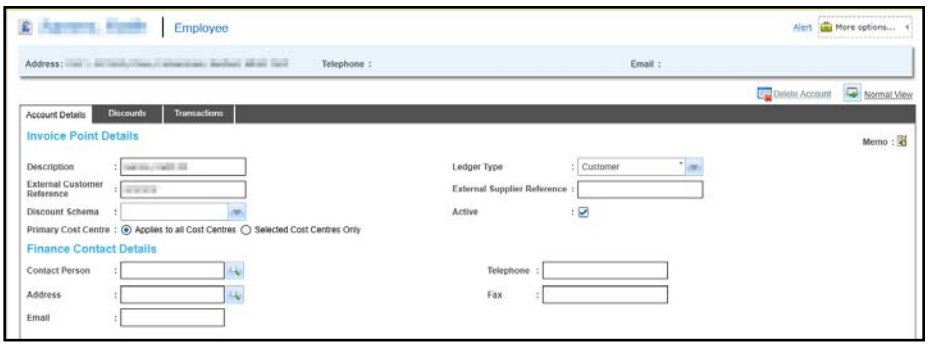
Based on the **Ledger Type** selected, **Customer**, **Supplier** or **Customer and Supplier**, the following fields will be made active:

- 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.

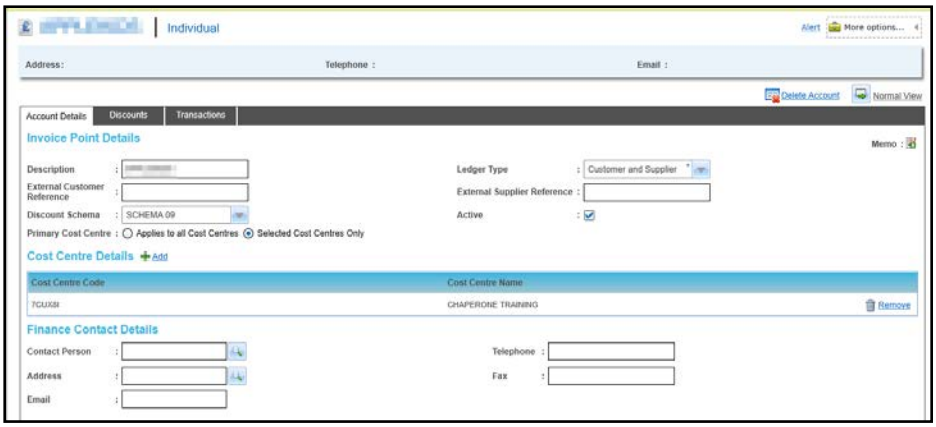
5. Select the required invoice point in the list to display the **Account Details**.



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 44*.



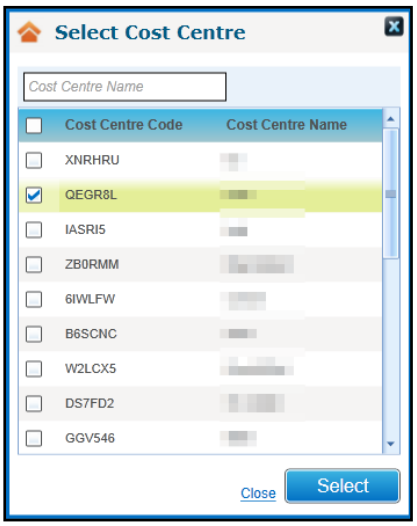
2. Edit the details of the account as described in Adding an Invoice Point on page *41*.
3. Click the **Save** button.

Adding Cost Centre Details

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

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*).



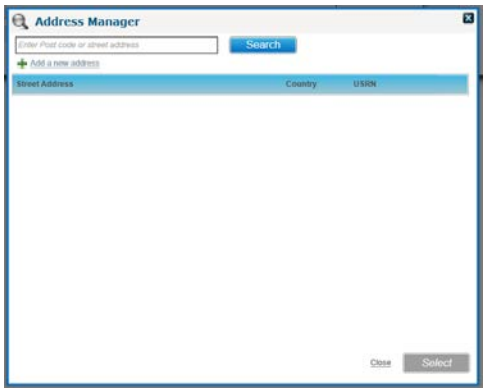
2. Select the check box for the required cost centre in the list.
3. Click the **Select** button.

Removing Cost Centre Details

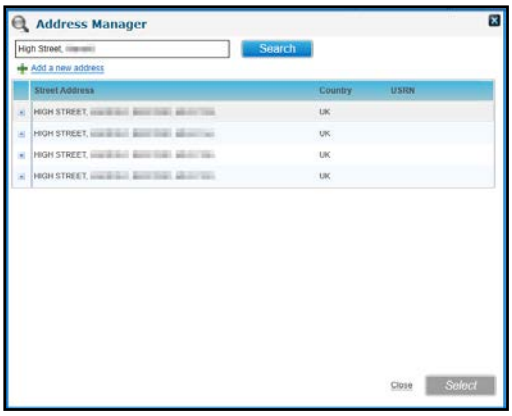
To remove cost centre details for an invoice account:

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.

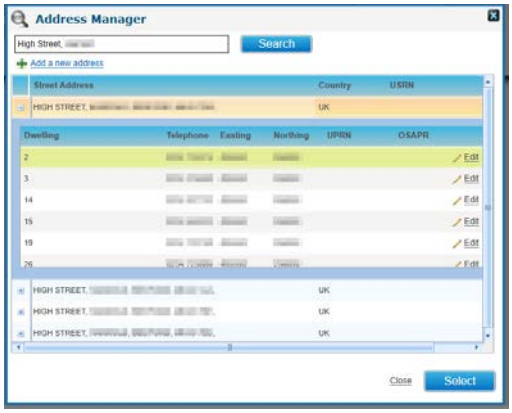
Selecting an Address



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:

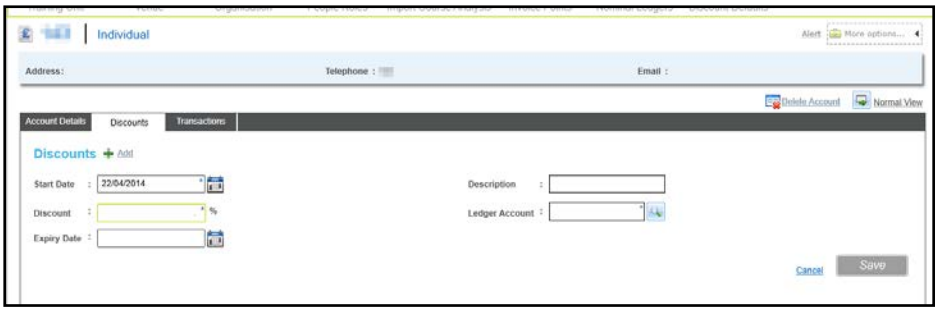
1. A specific discount percentage for the invoice point. If this is present it takes precedent over any other discount types that apply.
2. The invoice point is associated with a discount schema, which applies a percentage discount.
3. The invoice point is a base and there is a discount percentage associated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

> ***NOTE:** If more than one discount applies to a specific invoice point, only the first discount percentage is applied. They are not cumulative.*

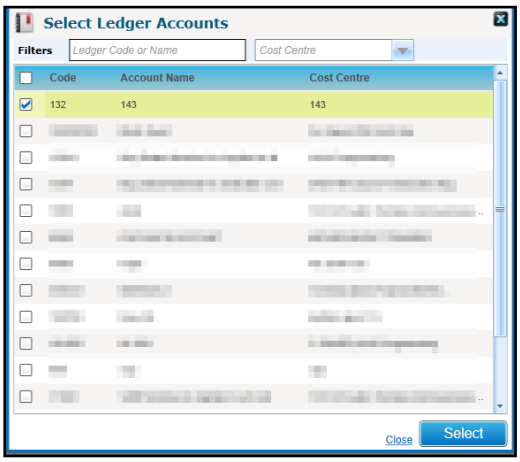
Adding Discounts to a Specific Invoice Account

1. Select the required **Invoice Point** to display the account details.

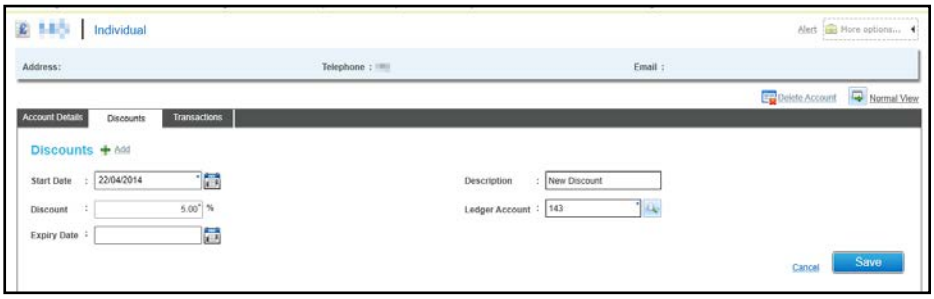
   For more information, see Selecting an Invoice Point *on page 44*.
2. Select the **Discounts** tab to display a list of current discounts for this account.
3. Click the **Add** button to display the **Discounts** panel in add mode.



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



7. Select one or more accounts and click the **Select** button.

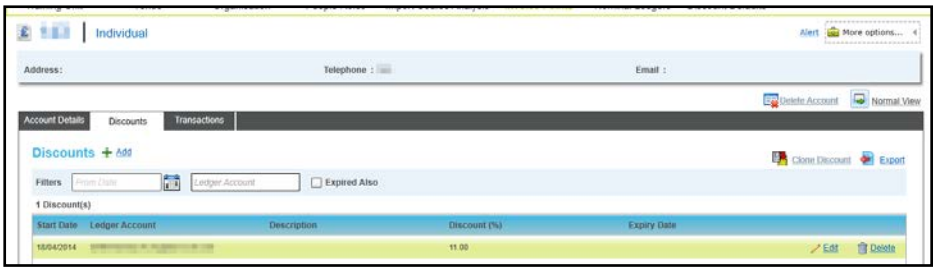


8. If required, select an **Expiry Date**.
9. Click the **Save** button.

Viewing a Discount

1. Select the required invoice account.

   For more information, see Selecting an Invoice Point *on page 44*..
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

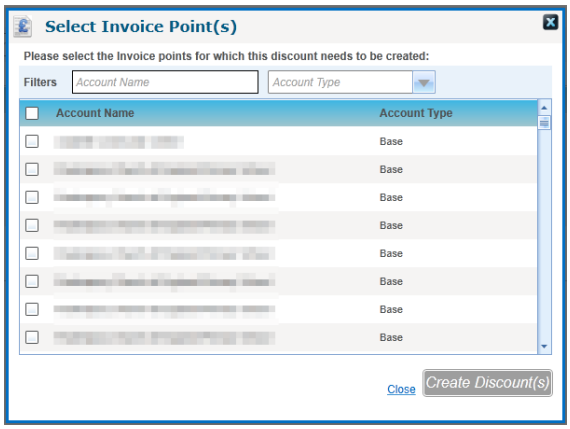
A discount can be cloned and added to one or more invoice accounts.

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

   For more information, see Selecting an Invoice Point *on page 44*.

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.

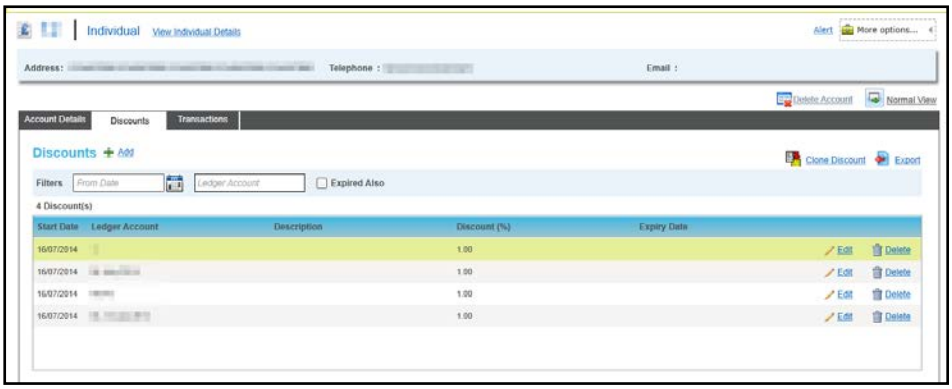
Exporting a Discount

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 44*.

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:

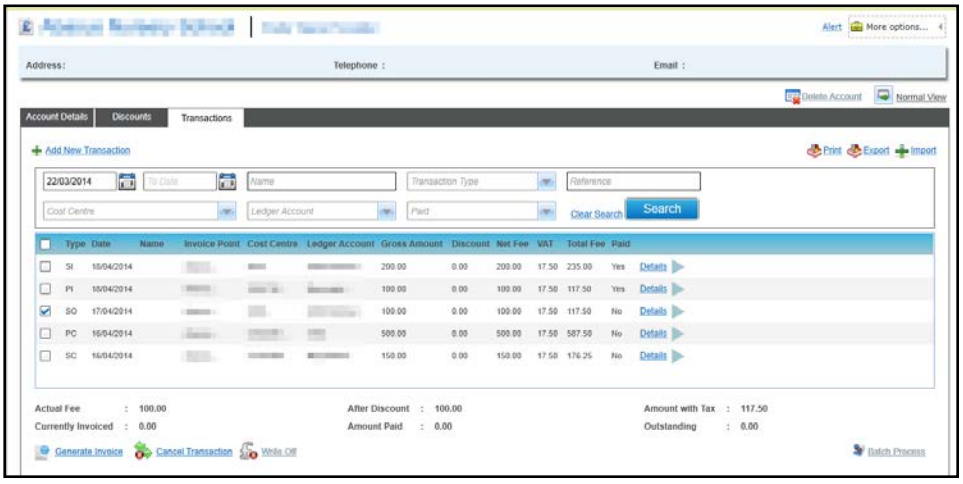
Selecting an Invoice Point *on page 44* and Managing Transactions on page *62*.

Viewing Transactions for an Invoice Point

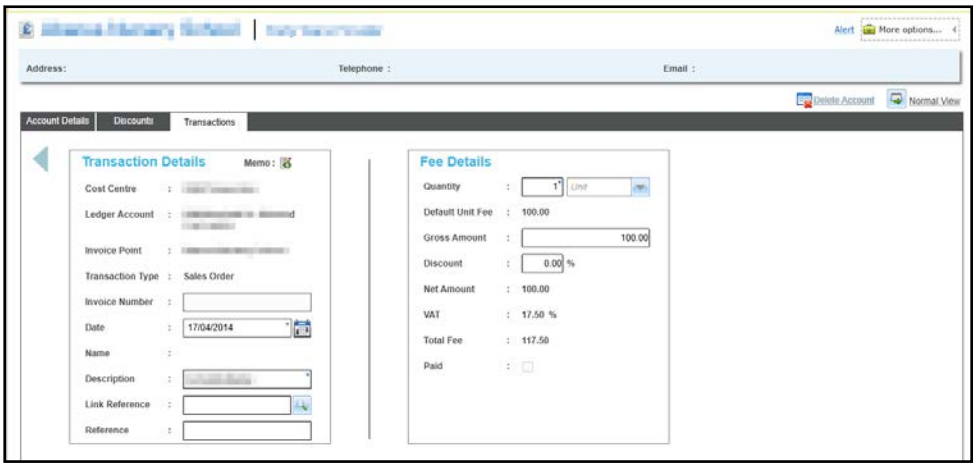
A list of transactions can be viewed for a selected invoice point.

1. Select the required invoice account to display the **Account Details**.

   For more information, see Selecting an Invoice Point *on page 44*.
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 Training Manager. 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 application fees. 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.

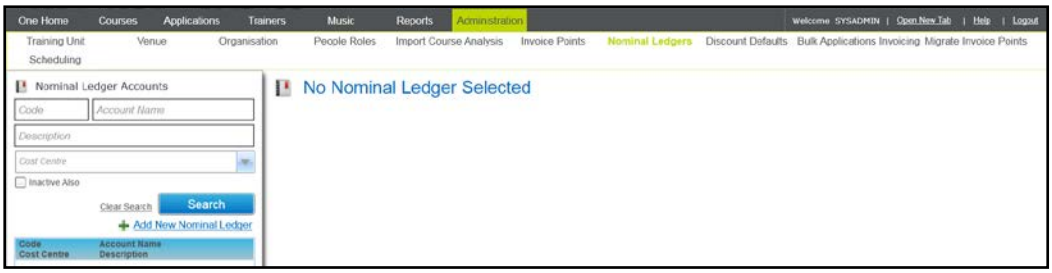
For example, the Local Authority offers three types of courses, Course 1 for a standard application fee of £100, Course 2 for a standard application fee also of £100 and Course 3 for a standard fee of £80 for a period. In order to maintain financial transactions within the One database, the Local Authority would need to set up at least one nominal ledger with a default fee of £100 (to cover Course 1 and Course 2, alternatively the LA may wish to have two separate ledgers for these) and one with a default fee of £80 to accommodate Course 3.

The LA may consider setting up a nominal ledger for each course so that profitability of those courses can be more easily viewed, where both application fee transactions (Sales Orders/Sales Invoices) and costs incurred transactions for items such as venue hire and catering (Purchase Orders/Purchase Invoices) are grouped.

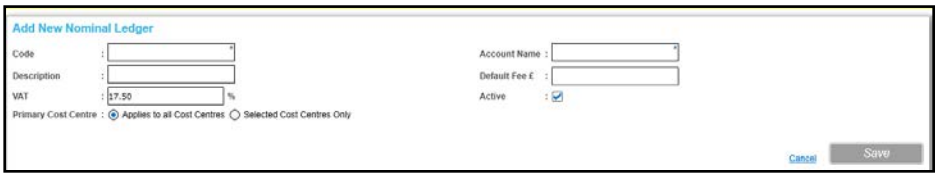
An LA may wish to record a zero cost nominal ledger if the service it provides is free but it also wants to maintain records of any costs it incurs to provide that service, e.g. in room hire, catering, trainer fees etc.

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.



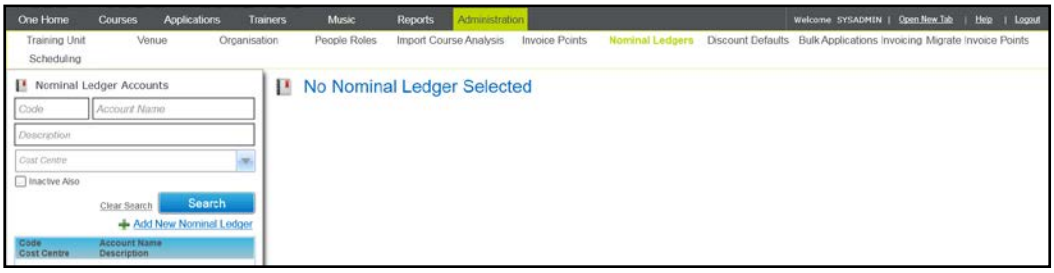
4. Enter a numeric **Code**. This may be the code used in your third party finance system for this ledger account.
5. Enter an **Account Name**.
6. If required, enter a **Description** and **Default Fee**.
7. If required, enter a different **VAT** rate.
8. Select the required **Primary Cost Centre** 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 *52.*
9. Click the **Save** button.

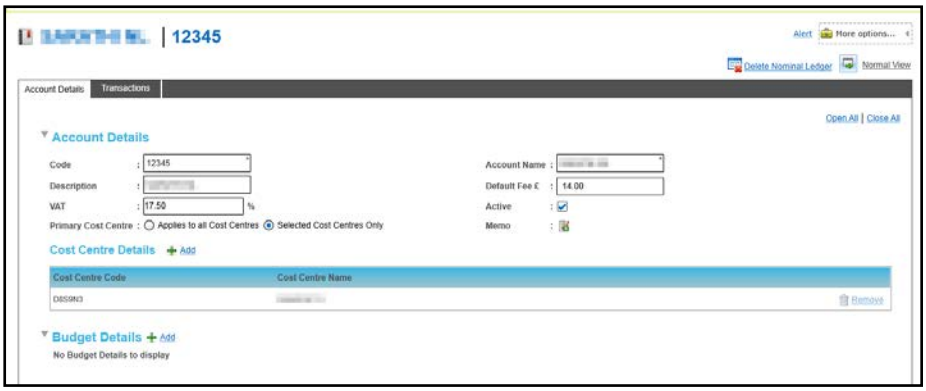
Viewing a Nominal Ledger Account

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



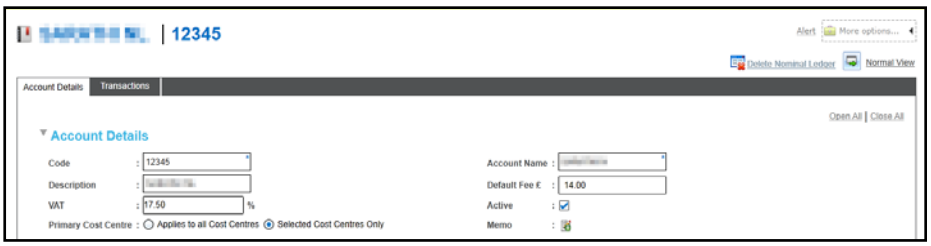
Updating a Nominal Ledger Account

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

Updating Account Details

1. Select the required account details.

   For more information, see Viewing a Nominal Ledger Account *on page 51*.



2. Edit the account details as described in Adding a Nominal Ledger Account on page *50*.
3. Click the **Save** button.

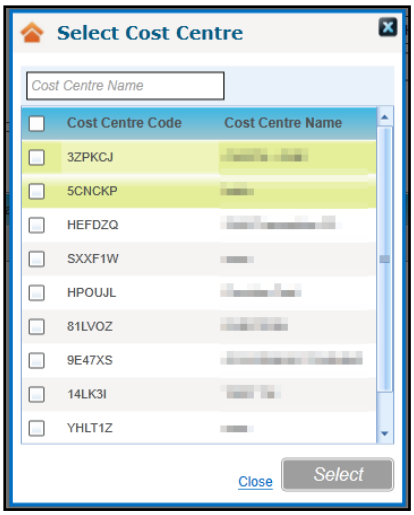
Adding a Cost Centre to a Nominal Ledger Account

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

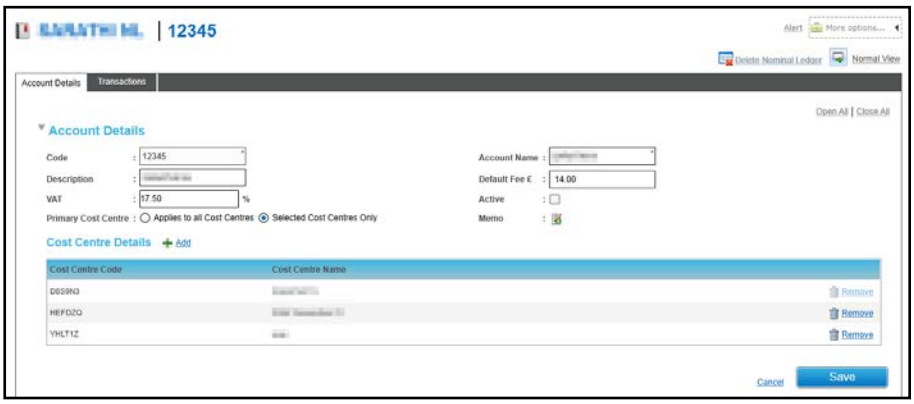
1. Select the required account to view its details.

   For more information, see Viewing a Nominal Ledger Account *on page 51*.

2. 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.



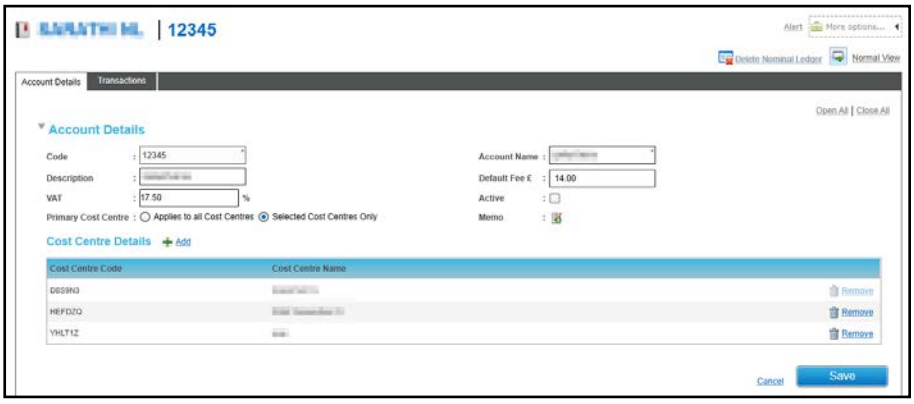
6. Click the **Save** button.

Removing a Cost Centre from a Nominal Ledger Account

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

1. Select the required account to view its details.

   For more information, see Viewing a Nominal Ledger Account *on page 51*.



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

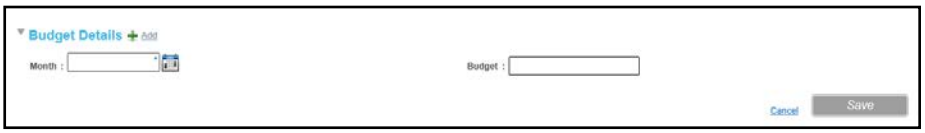
Budget information is divided into months.

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 51*.

2. On the **Budget Details** panel, click the **Add** button to display the **Month** and **Budget** input fields.



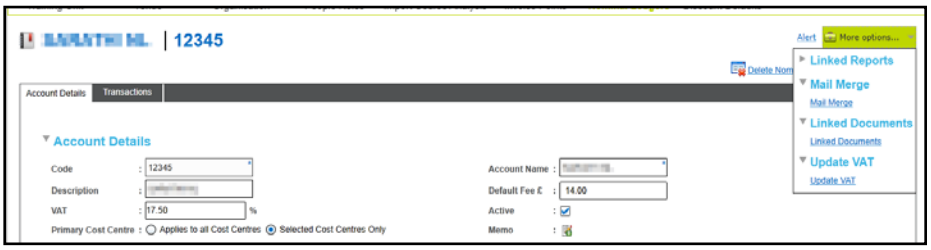
3. Select a **Month** from the calendar.
4. Enter a **Budget**.
5. Click the **Save** button.

Bulk Updating VAT for Nominal Ledgers

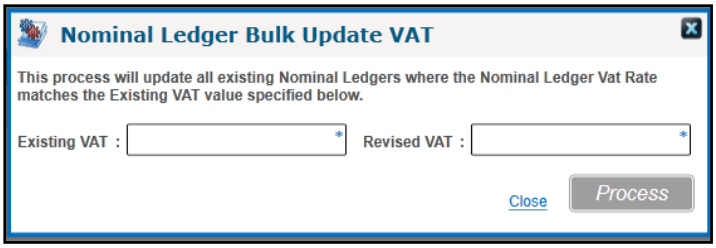
The Update VAT routine enables you to update VAT rates in bulk for all Nominal Ledger accounts with the same existing rate.

1. Select the required account to view its details..

   For more information, see Viewing a Nominal Ledger Account *on page 51*.



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



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 51.*
> Managing Transactions on page *62*.

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 51*.
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

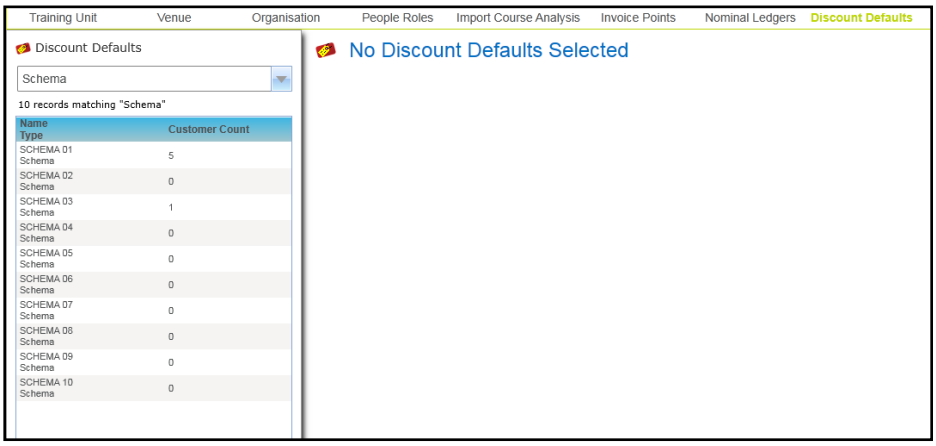
> ***NOTE:*** *A maximum of 10 discount schemas can be recorded and applied to invoice points at any given time. You can add multiple invoice points to a schema via the* ***Invoice Points*** *tab.*

It is not possible to add any further schemas.

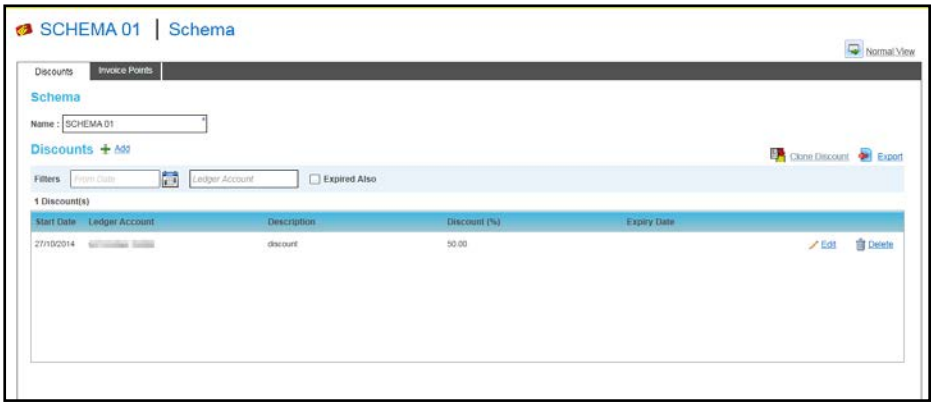
1. Select the **Administration** area.
2. Select the **Discount Defaults** tab to display a list of existing defaults.

> ***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.



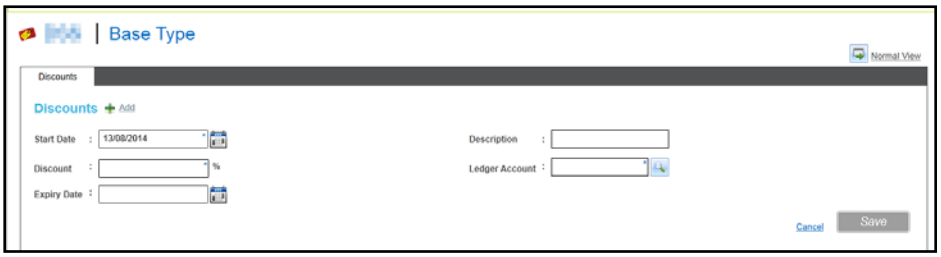
4. If the **Defaults Type** is **Schema**, you can select the **Invoice Points** tab to display associated **Invoice Points**.

For more information about adding invoice points to a schema, see Maintaining Invoice Accounts *on page 41*.

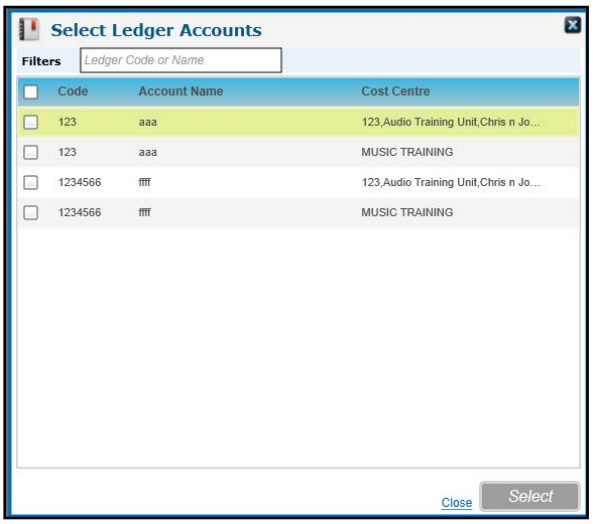
Adding a Discount

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.



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.

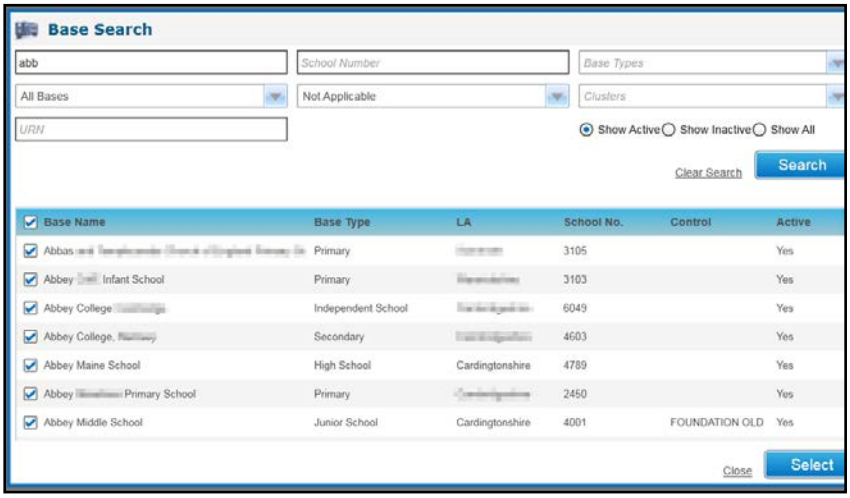
For more information about creating invoice points, refer to Maintaining Invoice Accounts on page *41*.

Migrating an Invoice Point for a Base

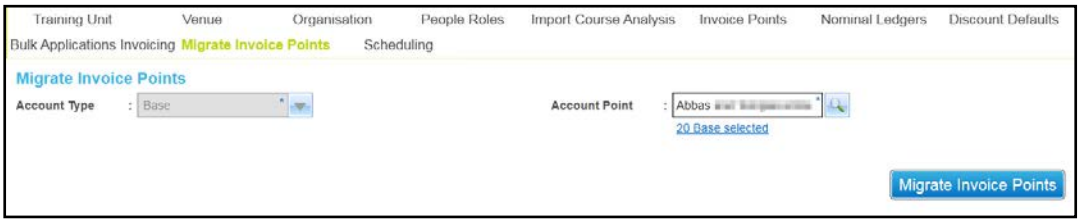
1. Select the **Administration** area.
2. Select the **Migrate Invoice Points** tab to display the **Migrate Invoice Points** page.

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.

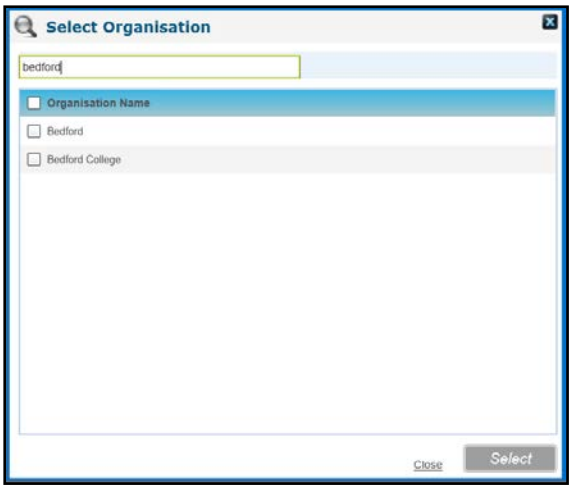


7. Click the **Migrate Invoice Points** button to create invoice points for the selected bases and link existing applications to the invoice points.

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.



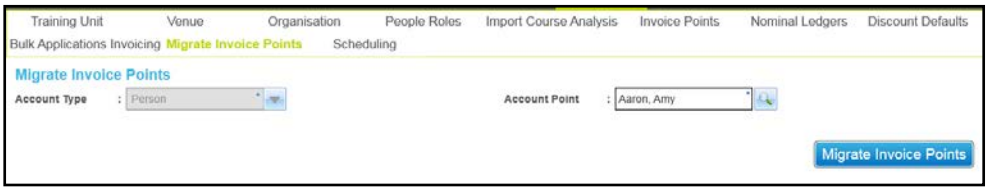
6. Select the organisations for which you want to create invoice points and click the **Select** button.

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 *37*.
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 *120*.

For information about sending emails via the scheduler, see Using the Scheduler to Send an Email on page *8*.

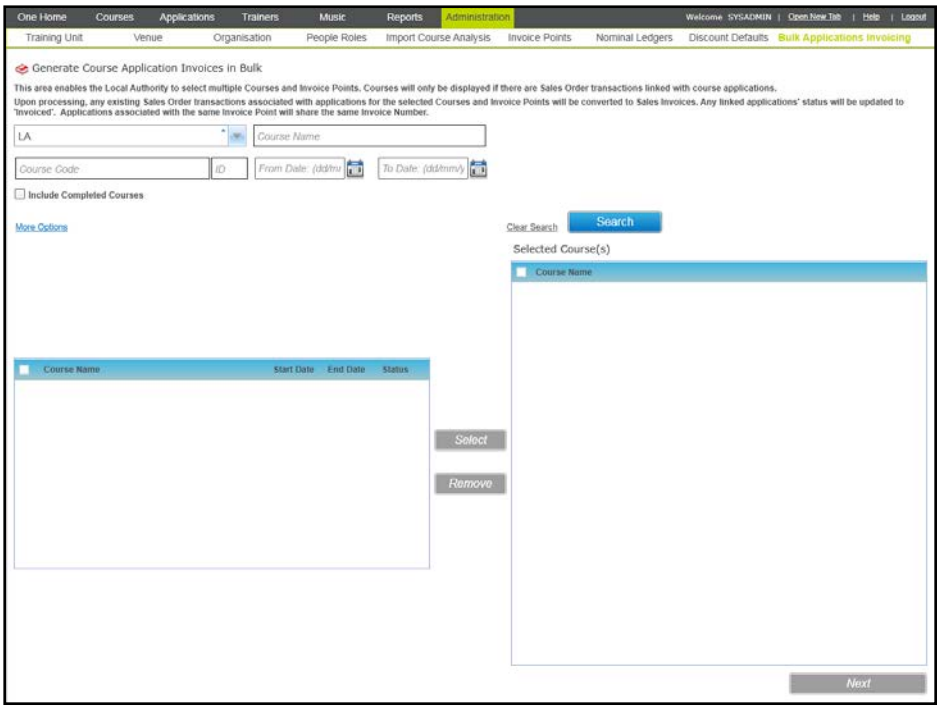
1. Select the **Administration** area.
2. Select the **Scheduling** tab to display the **Scheduling Email Options** page.

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.

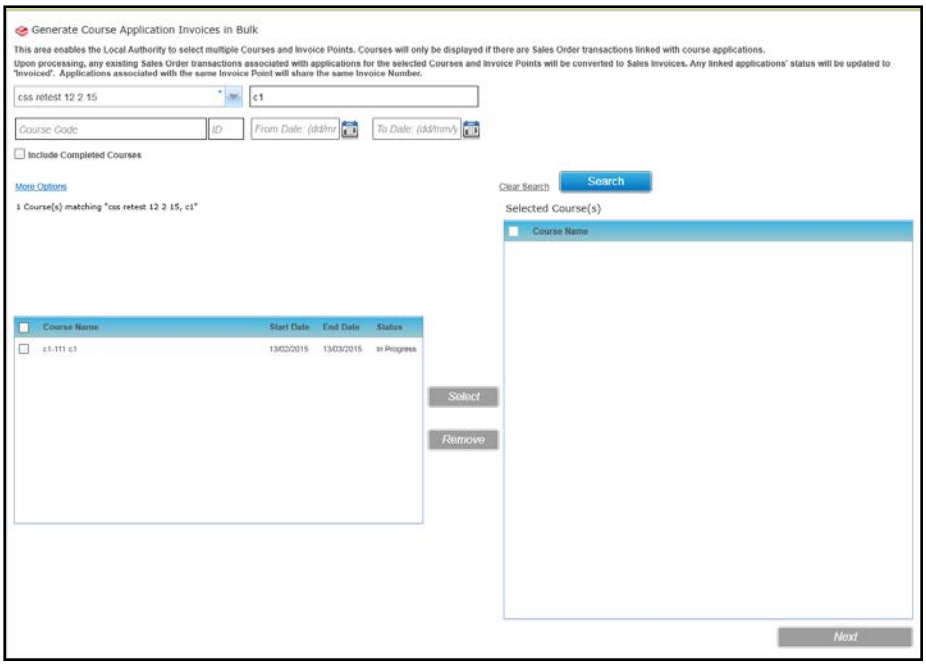
> ***NOTE:*** *In order to run this routine you must be in a user group that has been assigned write permission for the business process* ***Generate Course Applications in Bulk*** *under the main business process of* ***Finance****.*
> *For more information, see Setting up Permissions on page 15.*



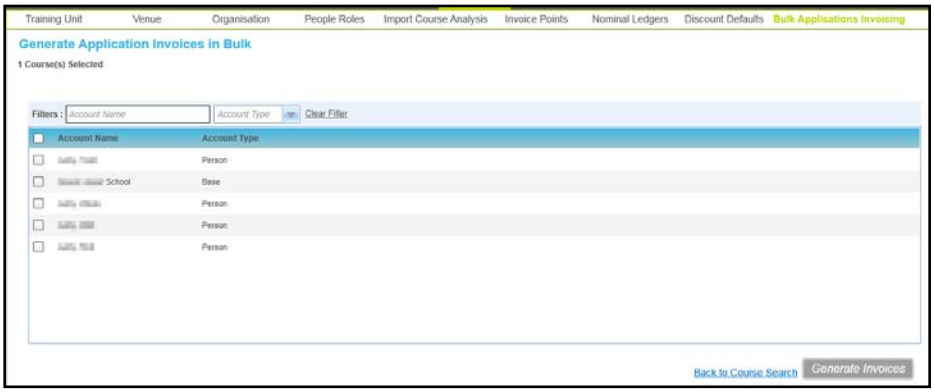
1. Select the **Administration** area.
2. Select the **Bulk Applications Invoicing** tab.
3. Select a **Training Unit** from the drop-down list.
4. If required, enter a **Course Name**, **Course Code**, **From Date** and **To Date**.

   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.



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, a nominal ledger and an invoice point. Transactions can be accessed from any of those entities. For transactions relating to tuition, the transaction is usually added from the relevant course, 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.

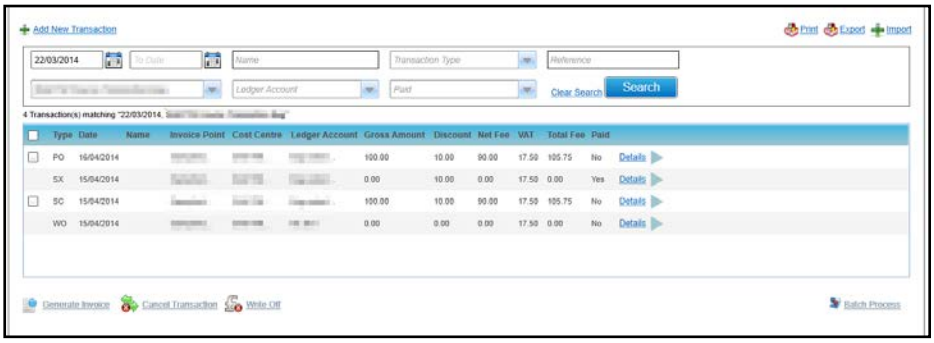
More information:

Managing Transactions for an Invoice Account *on page 49.*
Managing Transactions for a Nominal Ledger Account *on page 55.*
Managing Course Billing *on page 108.*

Adding a New Transaction

> ***NOTE:*** *Transactions are usually added from the* ***Course*** *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 64*.



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

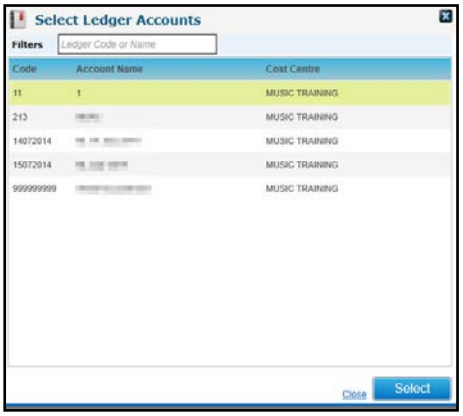
4. Enter **Transaction Details** as follows:

> ***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.



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 37*.

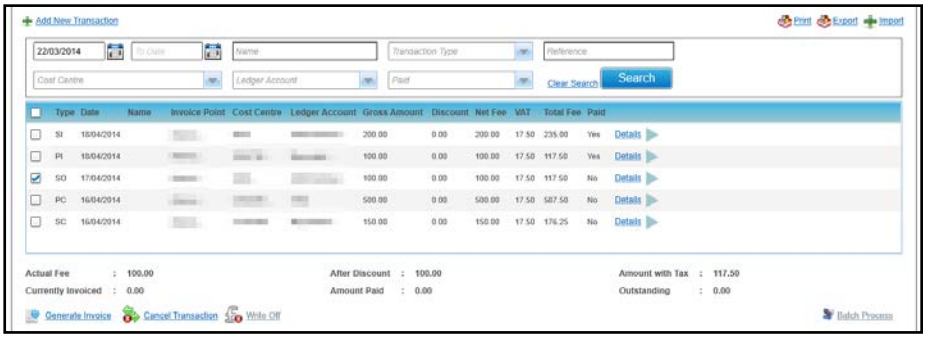
13. Enter a **Description**.
14. If required, click the **Link Reference** browse button to display the **Select Ledger Accounts** dialog and select a further account to be linked to this transaction. For example, to group nominal ledger accounts together, you can specify an overall account.
15. If required, 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 55.*

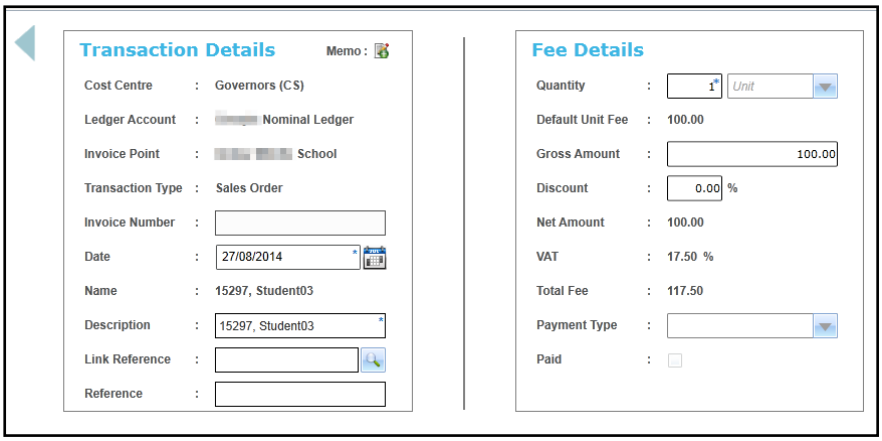
21. If required, select a **Payment Type** (*Lookup Table ID: 0567*).
22. Click the **Save** button.

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.



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



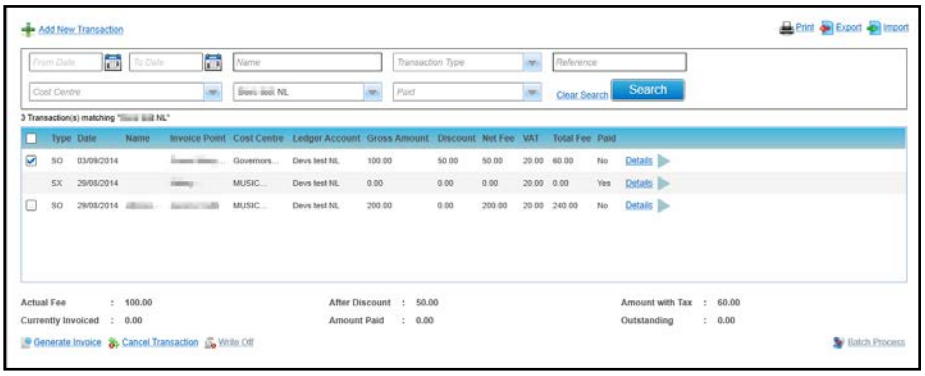
Generating an Invoice

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

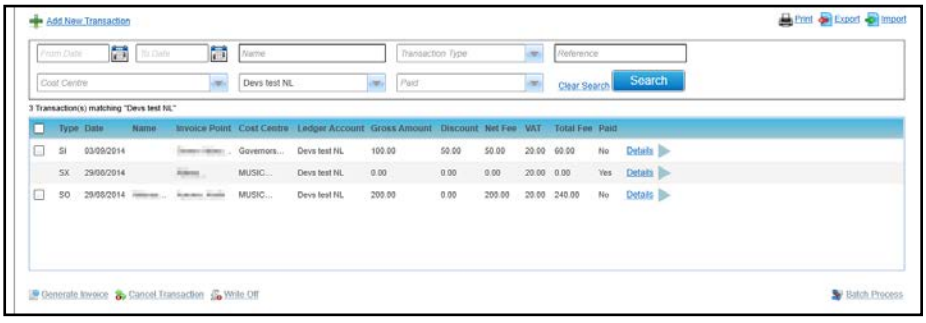
1. Open the account for which you wish generate an invoice and select the **Transactions** tab.

   For more information, see Viewing Transactions *on page 64.*

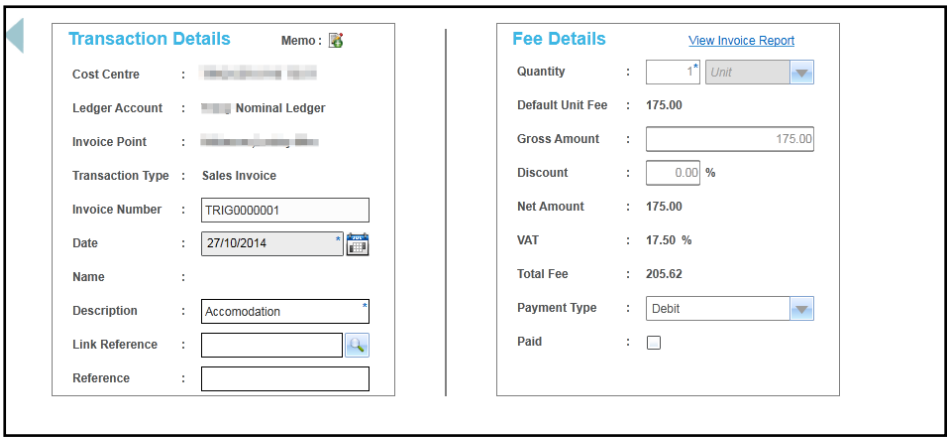
2. Select the check box for one or more sales order (**SO)** transactions with a **Paid** status of **No**.



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



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



*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*.*

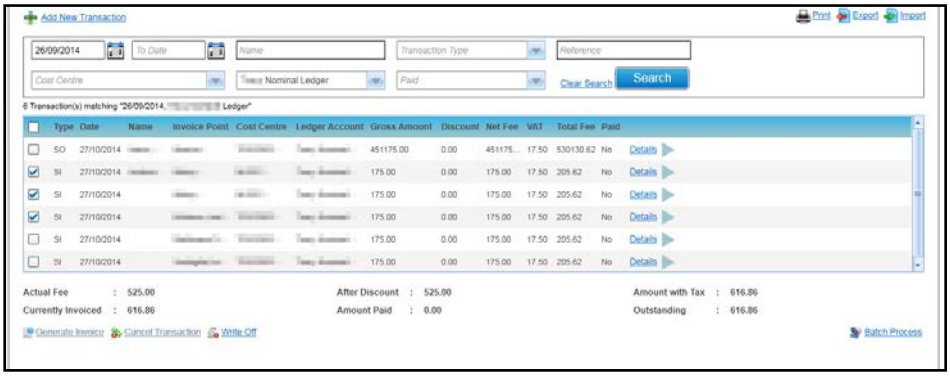
Generating an Invoice Report

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.

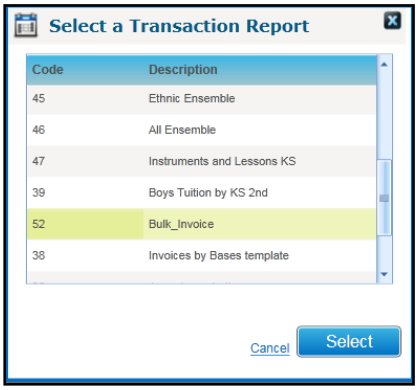
A template Invoice Report must be linked to the **Training Unit | Basic Details - Invoice Report**. A sample report is provided as one of the template standard reports.

***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.*

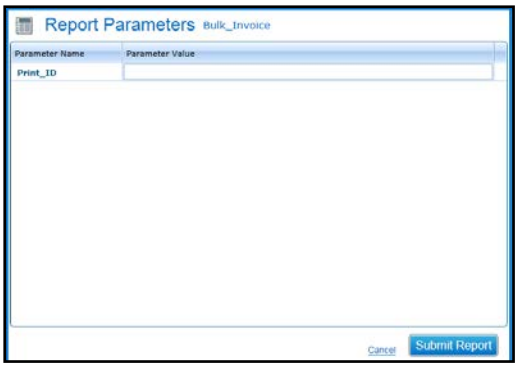
1. Select one or more Sales Invoice transactions.



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



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

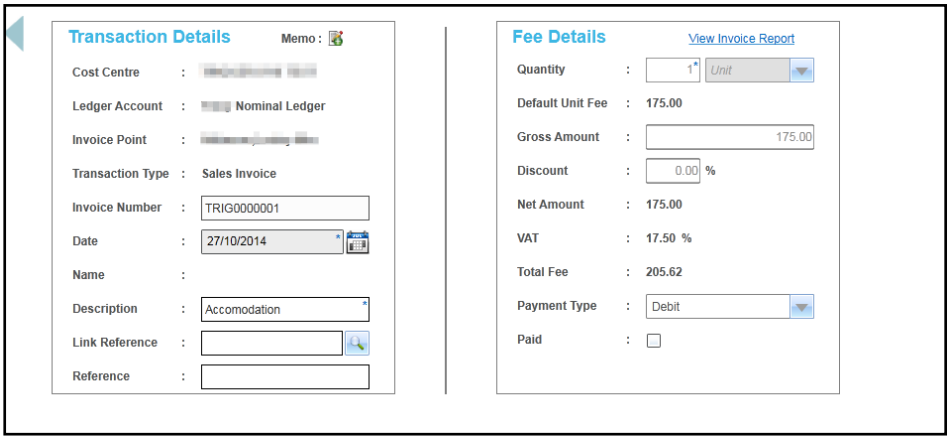


The **Parameter Value** will be automatically completed.

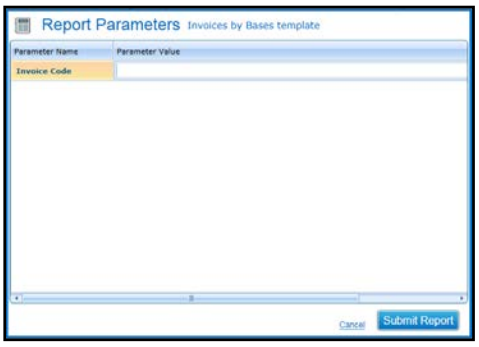
4. Click the **Submit Report** button.

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.

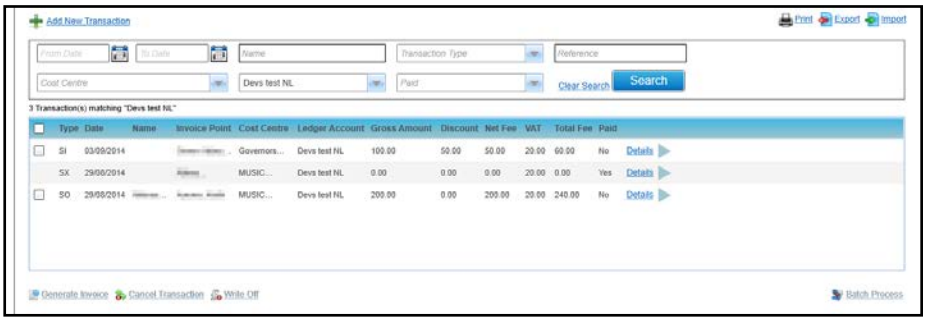
2. Click the **Submit Report** button.

Editing a Transaction

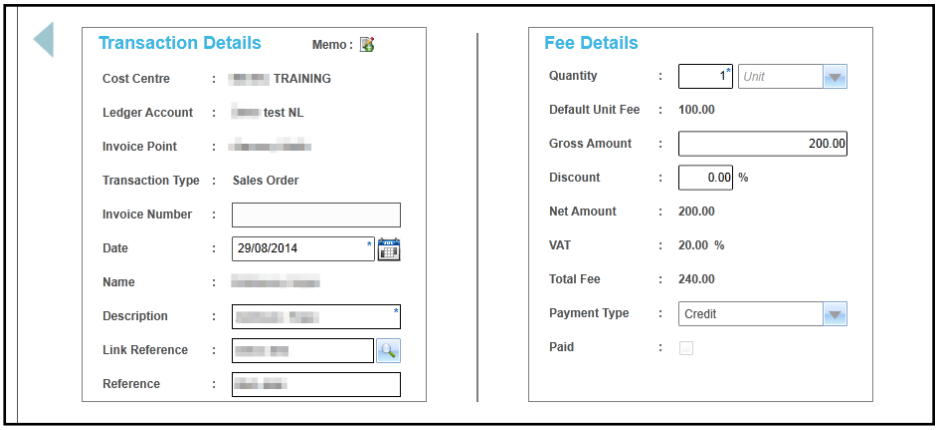
Transactions that have not been paid or cancelled can be edited. The details that are editable depend on the transaction type. Transactions with a type of SX, PX, WO, SI (Paid) or PI (Paid) cannot be edited.

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 64*.



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



3. Update the editable fields as described in Adding a New Transaction on page *63*

   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**.

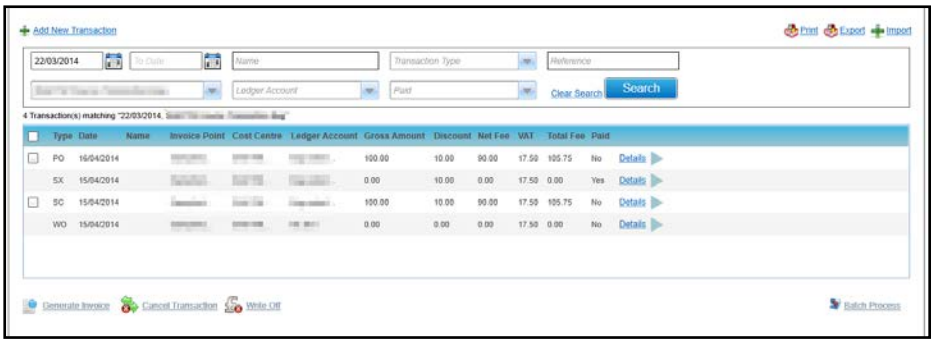
4. Click the **Save** button.

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).

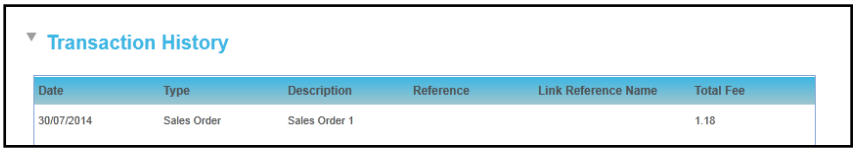
1. Open the account containing the transaction you wish to cancel and select the **Transactions** tab.

   For more information, see Viewing Transactions *on page 64*.



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:



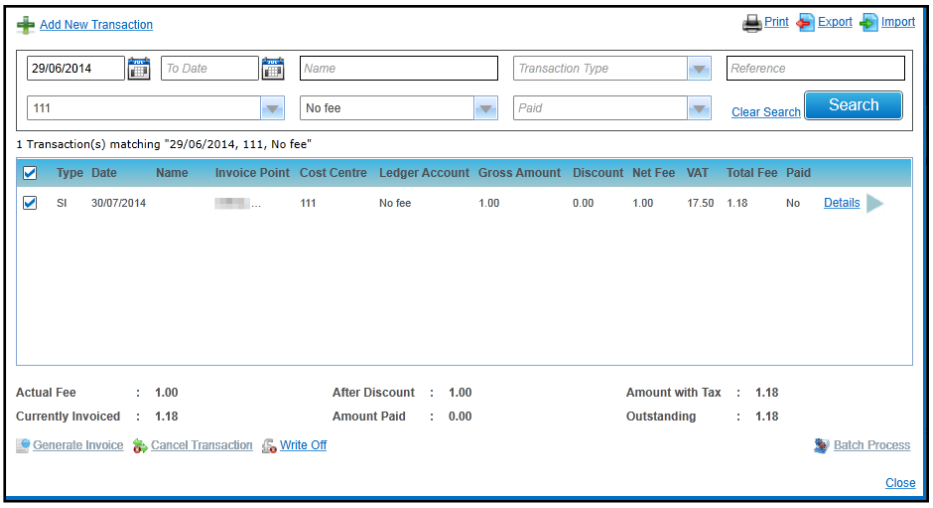
*NOTE: When a Sales Order or Purchase Order is cancelled, the **Type** is updated to **Cancelled Sales Order** or **Cancelled Purchase Order**, the **Paid** status is updated to **Yes** and the **Fee Details** are updated to 0.*

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 64*.
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**.



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.

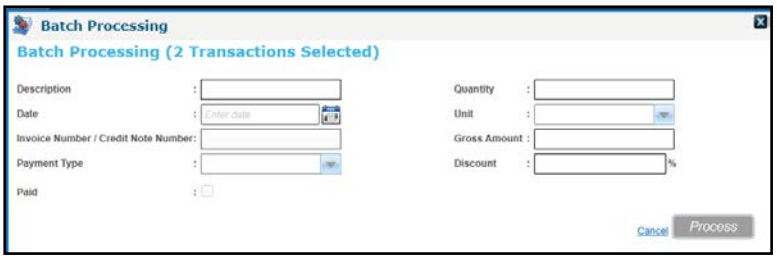
1. Open the account containing the transactions you wish to batch process and select the **Transactions** tab.

   For more information, see Viewing Transactions *on page 64*.

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

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.



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 is 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.

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 97.*
Managing Courses using the Calendar View *on page 103.*

Adding a New Course

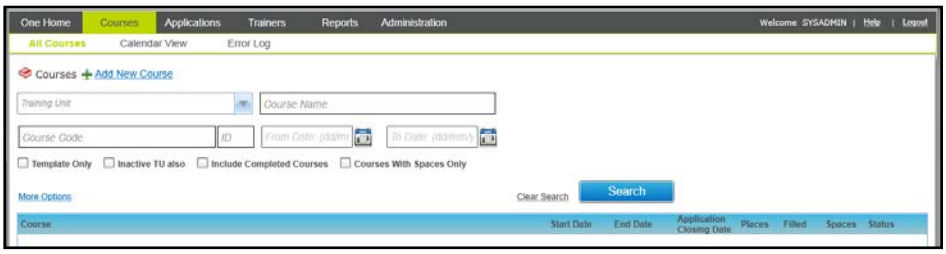
NOTE: *Courses in v 4 are not restricted by financial year settings. Therefore, course codes need to be unique across all courses and different from any existing v3 course codes (if migrating from v3 to v4). The system automatically checks for duplicate course codes when a new course is set-up.*

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

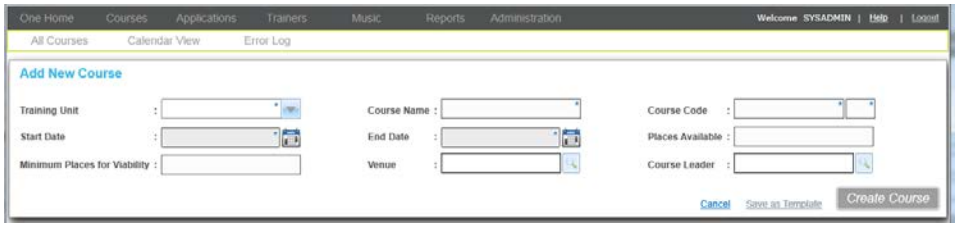
Course codes can be up to 15 characters.

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.



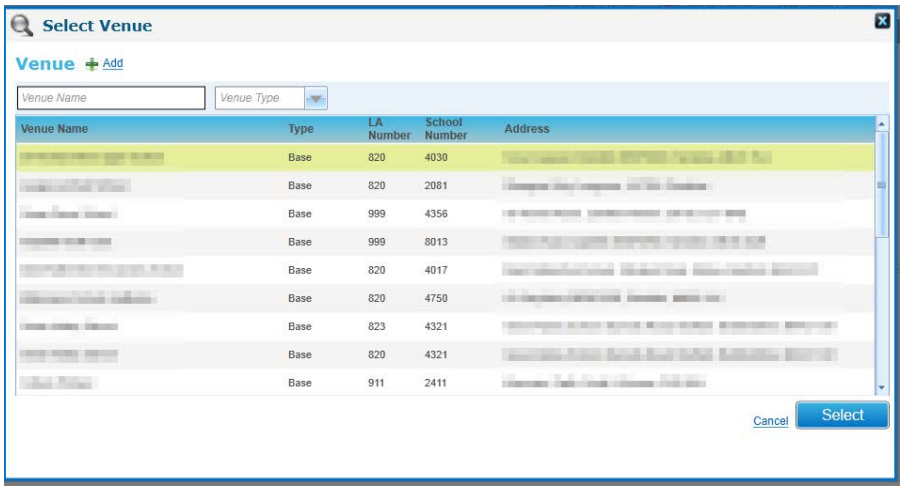
3. Click the **Add New Course** button to display the **Add New Course** screen.



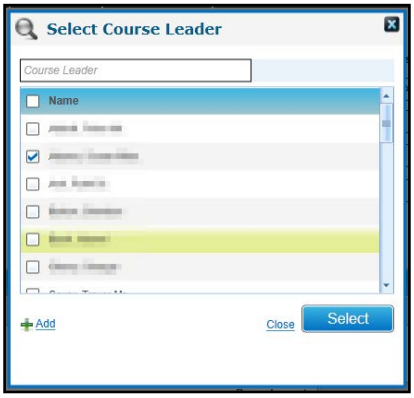
Entering New Course Details

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.



   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.



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 37*.

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

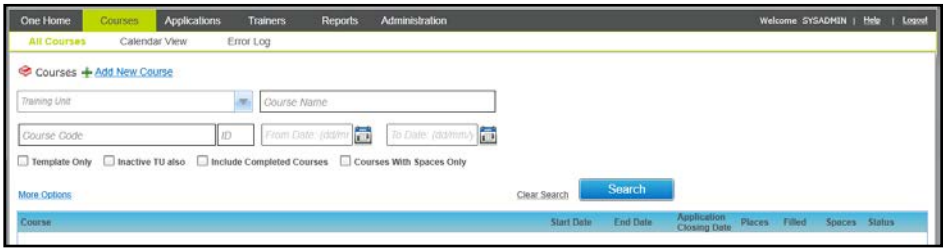
Alternatively, to save the details as a template, click the **Save as Template** button.

> ***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

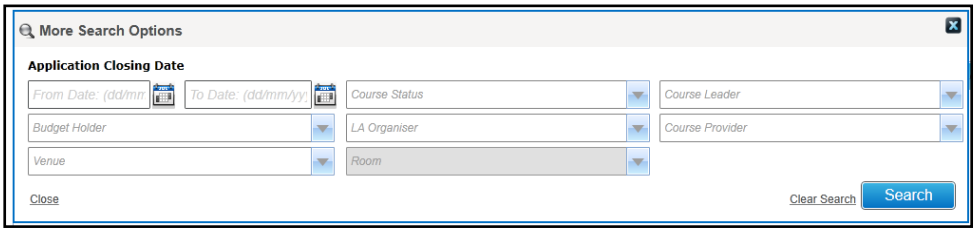
The **Courses** search is used to find available courses. You can enter search criteria to limit the courses displayed in the list. If the required course is not listed, it can be added or cloned from an existing course.

> **More Information:**
>
> Adding a New Course *on page 71*.
> Cloning a Course *on page 74*.

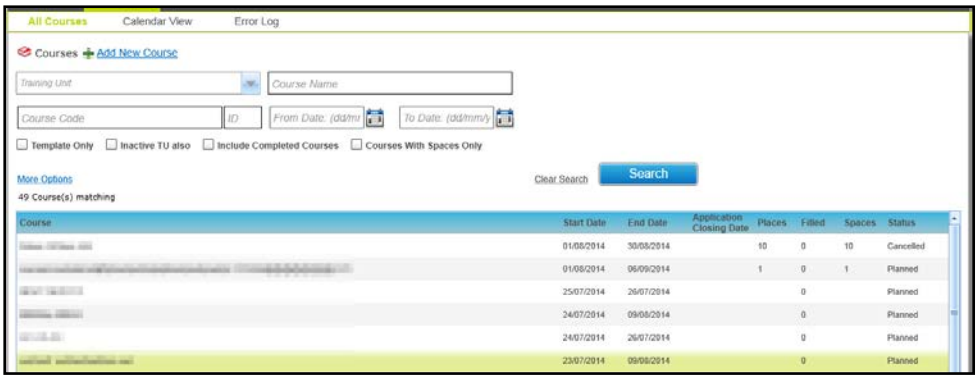


1. Select the **Courses** area.
2. Ensure that the **All Courses** tab is selected.
3. Enter the required search criteria.
4. If required, select the **Inactive TU also check box** to search for courses for inactive training units in addition to active training units.

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



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



Cloning a Course

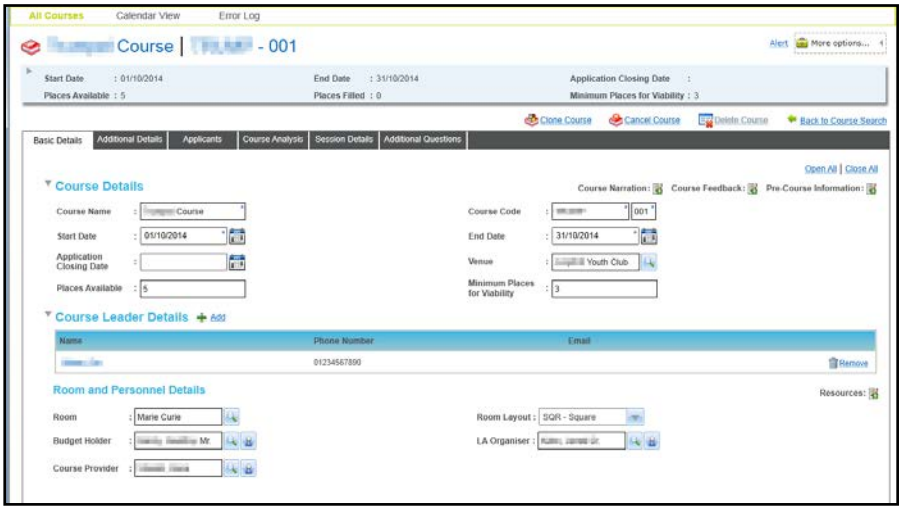
A new course can be created by cloning the details from an existing course. In addition to the course details, any pre-course information, narration memos, UDFs or additional questions configured for the existing course are copied to the new course.

> ***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).*

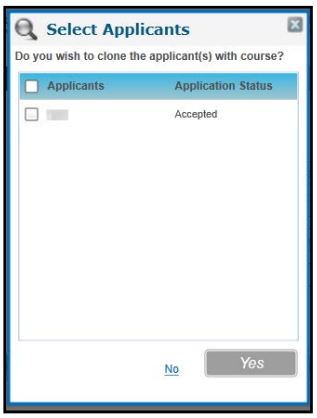
1. Search for the required course.

   For more information, see Searching for a Course *on page 73.*

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

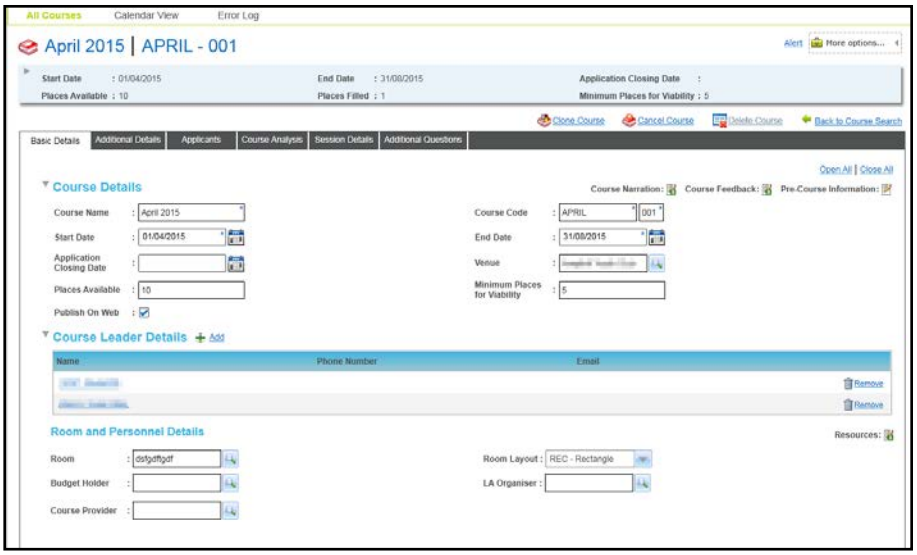
1. Search for the required course.

   For more information, see Searching for a Course *on page 73.*

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 75.*

   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**.

h. Select or de-select the **Publish on Web** check box.

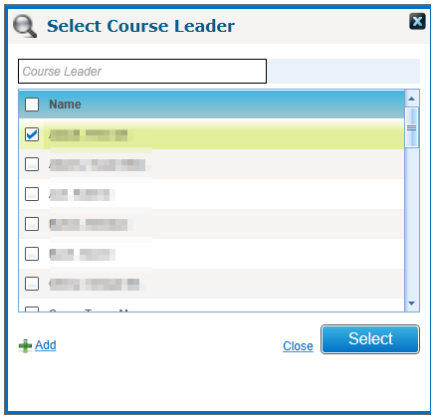
> ***NOTE:*** *If the* ***Publish on Web*** *check box is selected, the* ***Publish on Portal(s)*** *panel is displayed on the* ***Additional Details*** *panel*
> *For more information, see* *Publishing a Course on the Portals on page 79.*

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.

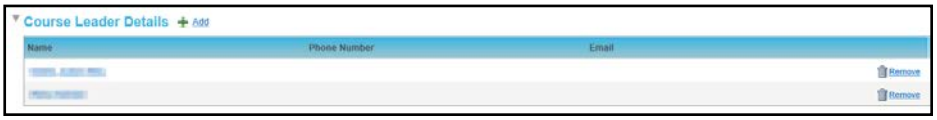


2. Select one or more **Names** in the list.
3. Click the **Select** button.

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 37*.

Removing a Course Leader from a Course

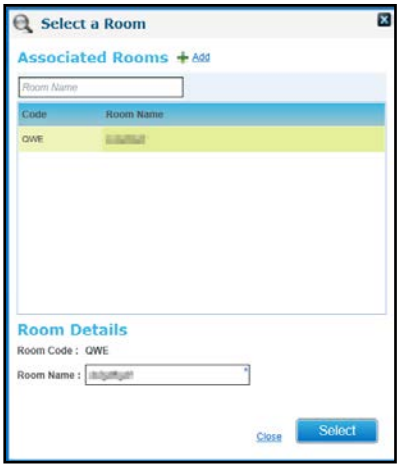


1. Click the **Remove** button to display a confirmation message.
2. Click the **Yes** button to remove the course leader.

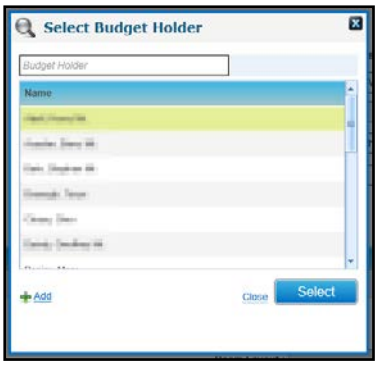
Editing Room and Personnel Details

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

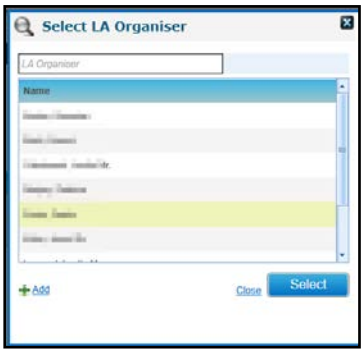
2. Click the **Room** browse button to display the **Select a Room** window. Rooms associated with the venue are listed.



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.

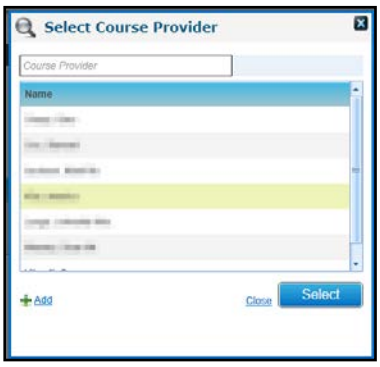


8. Select a **Name** and click the **Select** button.

   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 37*.

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 37*.

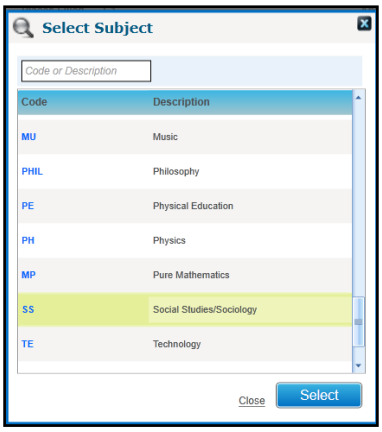
11. Click the **Save** button.

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 80*.

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 **a Subject:**
   a. Click the **Subject** browse button to display the **Select Subject** dialog. If required, enter a **Code** or **Description** to filter the list.

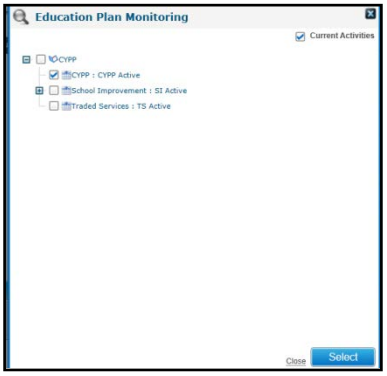


Select the required **Code** and click the **Select** button.

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 108.

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.

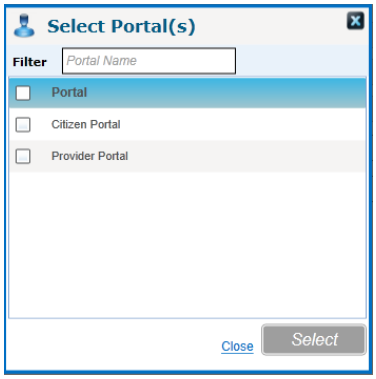
Publishing a Course on the Portals

A course can be published on one or more portals by selecting the required portal via the **Publish on Portal(s)** panel.

If the **Publish Training Unit's Course details on web by default?** check box is selected on the **Training Unit Details** panel accessed via **Administration | Training Unit**, any new courses created for this training unit will automatically have both Citizen Portal and Provider Portal check boxes selected.

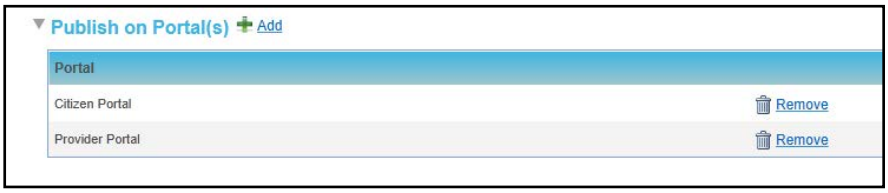
Selecting a Portal

1. Click the **Add** button to display the **Select Portal(s)** window.



2. Select one or more **Portals.**
3. Click the **Select** button.

Removing a Portal



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

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. The Publish on Portals(s) panel enables you to record if the course is available on one of the portals.

1. Search for the required course.

   For more information, see Searching for a Course *on page 73.*
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.*

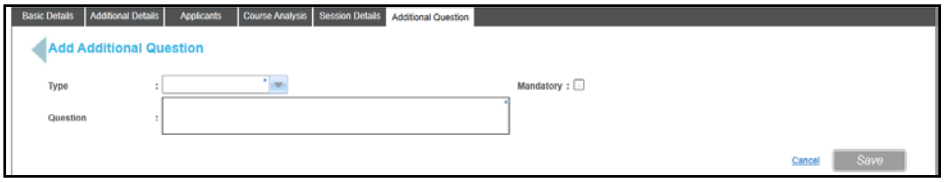
Adding Additional Questions to a Course

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 81.*

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

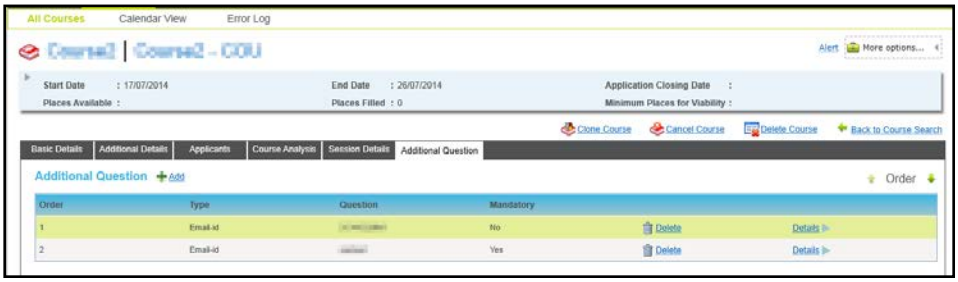
7. If required, click the **Order** arrows to change the order that the questions are displayed.

Viewing Additional Questions

1. Search for the required course.

   For more information, see Searching for a Course *on page 73.*

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



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.

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

   For more information, see Viewing Additional Questions *on page 81*.
2. Click the **Delete** button to display a confirmation message.
3. Click the **Yes** button to delete the question from the course.

Managing Session Details

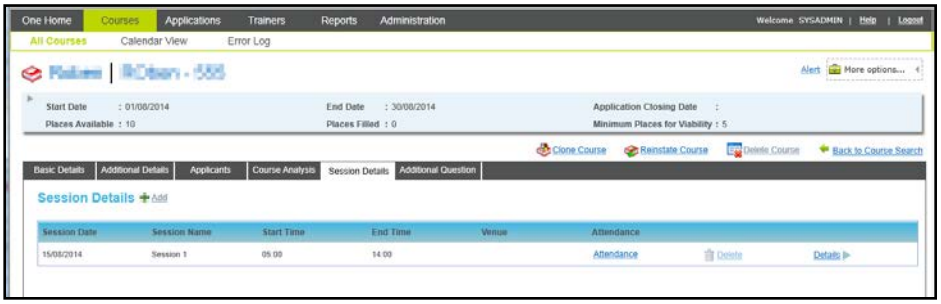
If courses are broken down into sessions, these can be recorded to represent sessions on different days or different times of the day.

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.*

1. Search for the required course.

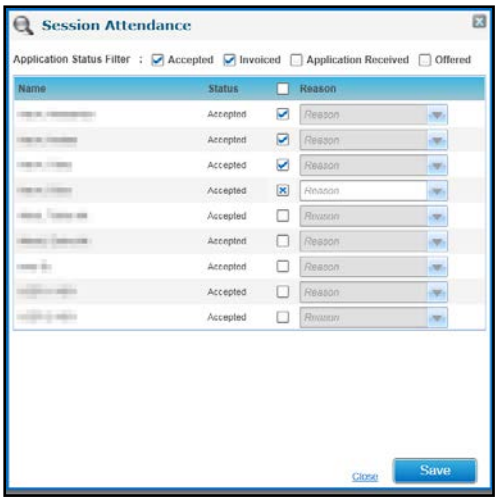
   For more information, see Searching for a Course *on page 73.*
2. Select a course in the list to display the details.
3. Select the **Session Details** tab to display the **Session Details** page.



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

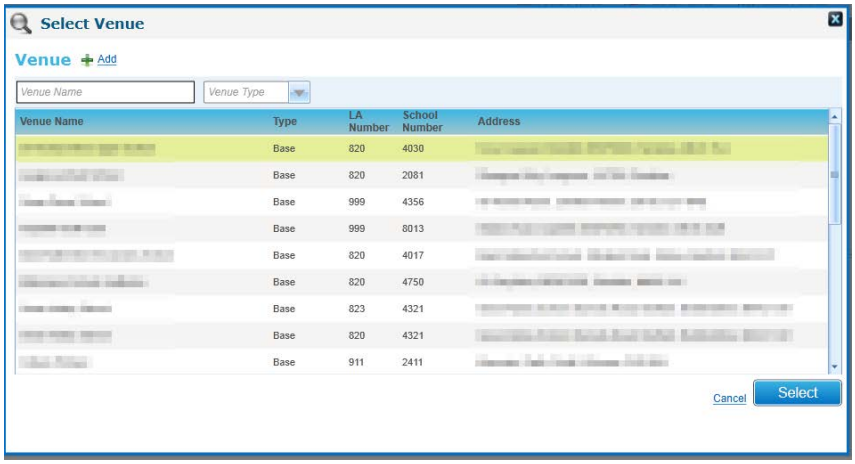
1. Click the **Add** button to display the **Add Session Details** and **Date Pattern** panels.

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**:

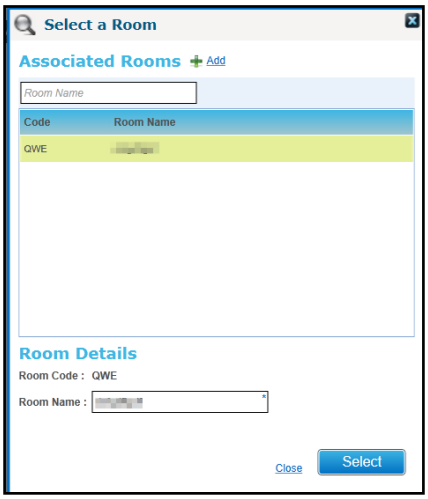
   a. Click the browse button to display the **Select a Venue** dialog.



   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 84.*

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.

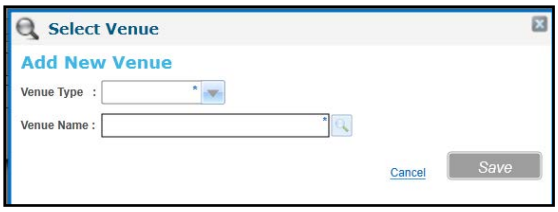
Viewing Details of a Session

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

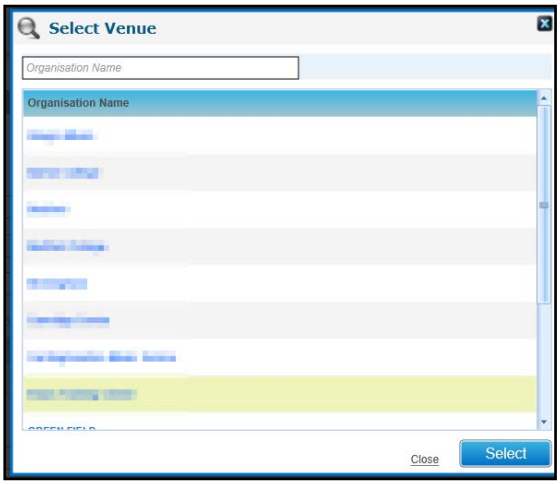
Adding a Venue

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

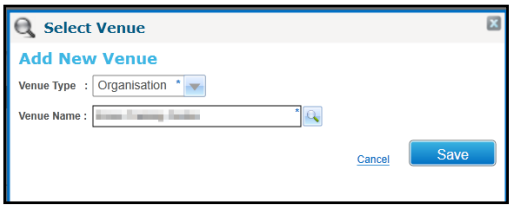
1. From within the **Session Details, Course details** or **Course Template details** page, click the **Venue** browse to display the **Select Venue** dialog.
2. Click the **Add** button to display the **Add New Venue** panel.



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.

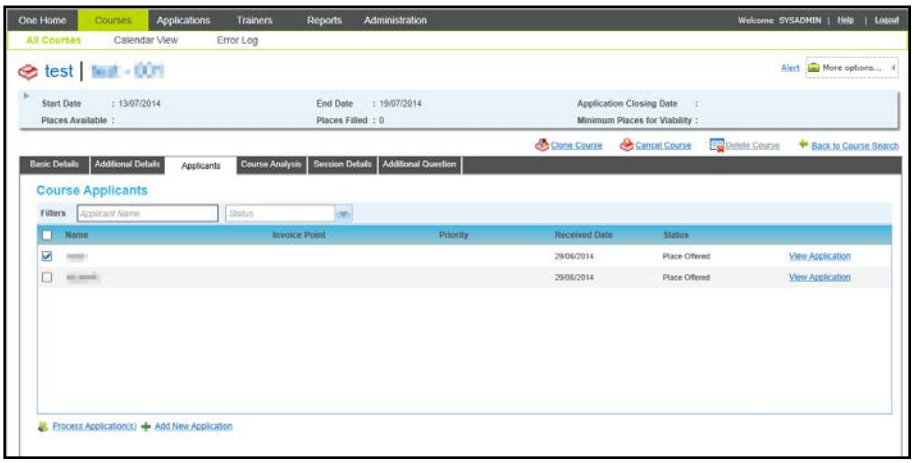


6. Click the **Save** button.

Adding a New Application

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

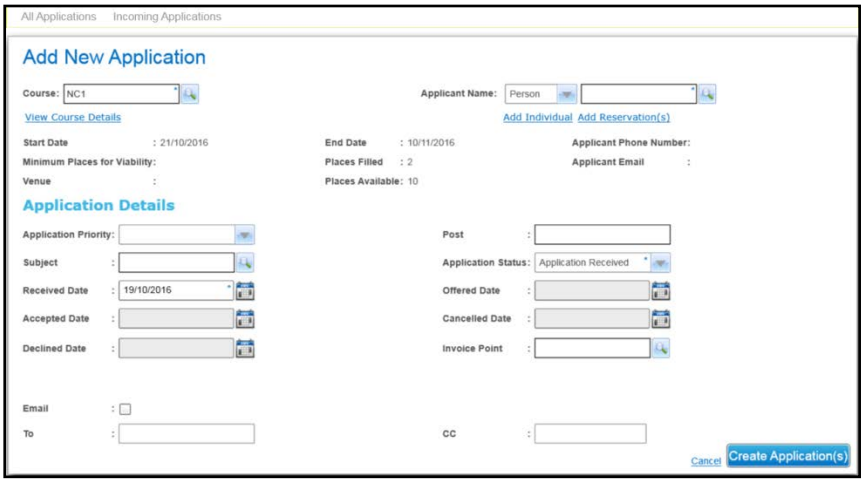
For more information, see Managing Applications *on page 111*.



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

   For more information, see Viewing Course Applicants *on page 86.*

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 135 or* Reserving Places on a Course *on page 136.*

   b. Enter the **Application Details**:

      For more information, see Entering Application Details *on page 132*.

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 88.

Managing Course Applicants

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

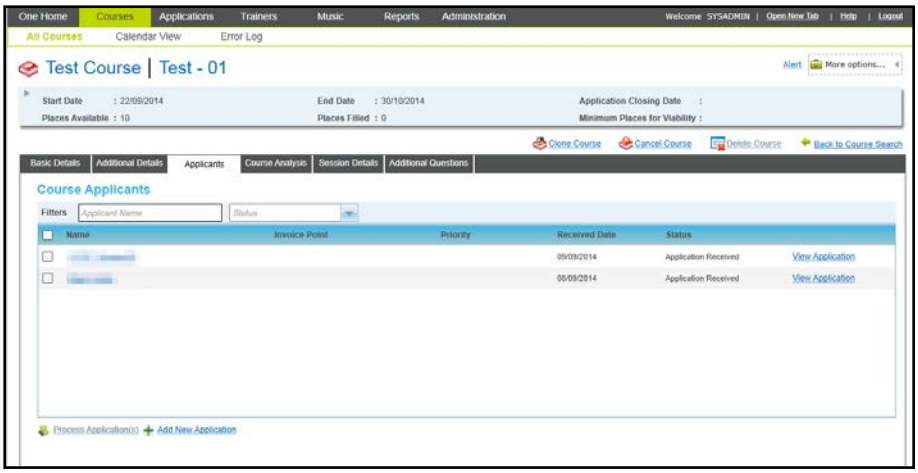
The **Applicants** tab is accessed via the **Courses | All Courses** area. It enables you to view the applicants for a particular course, view the details of their application, change the status or transfer their application to an alternative course.

Viewing Course Applicants

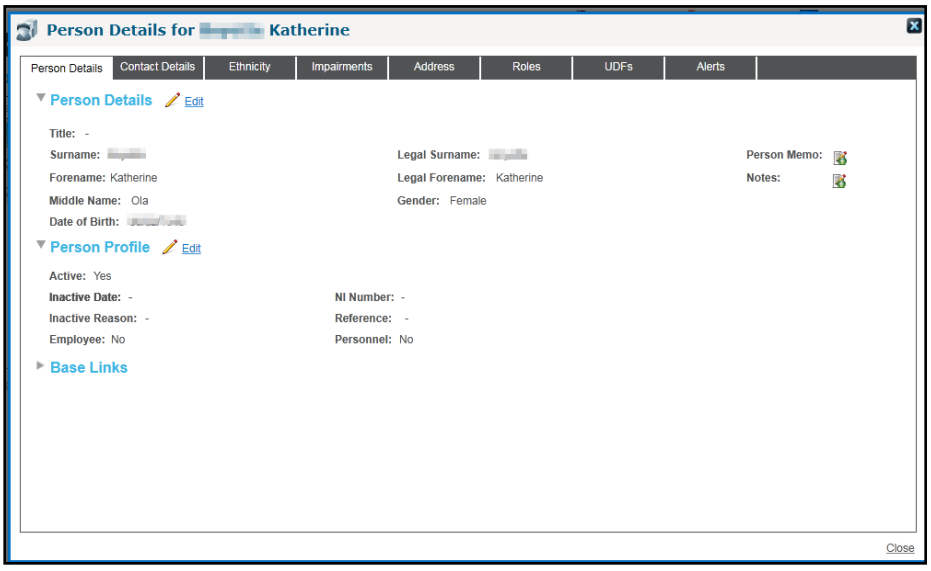
1. Search for the required course.

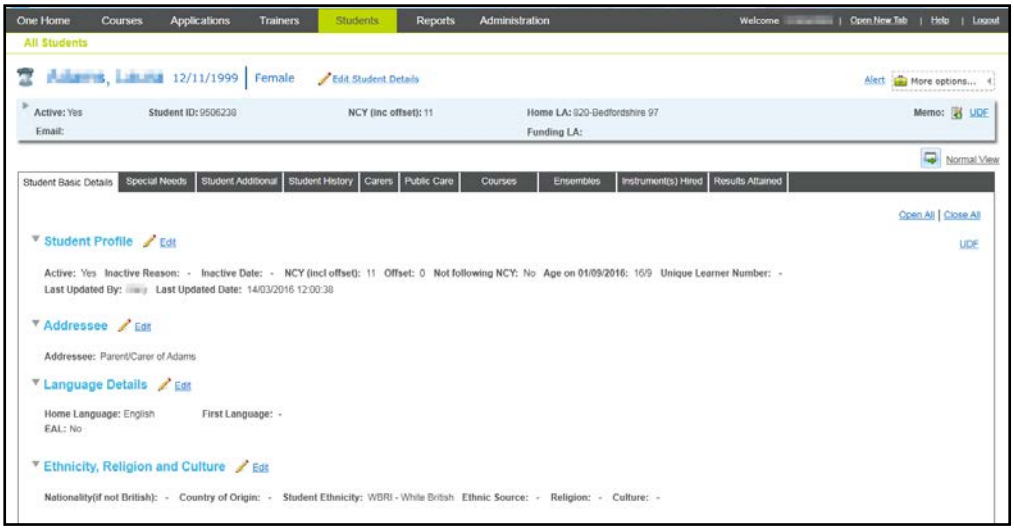
   For more information, see Searching for a Course *on page 73.*

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 person or student details.





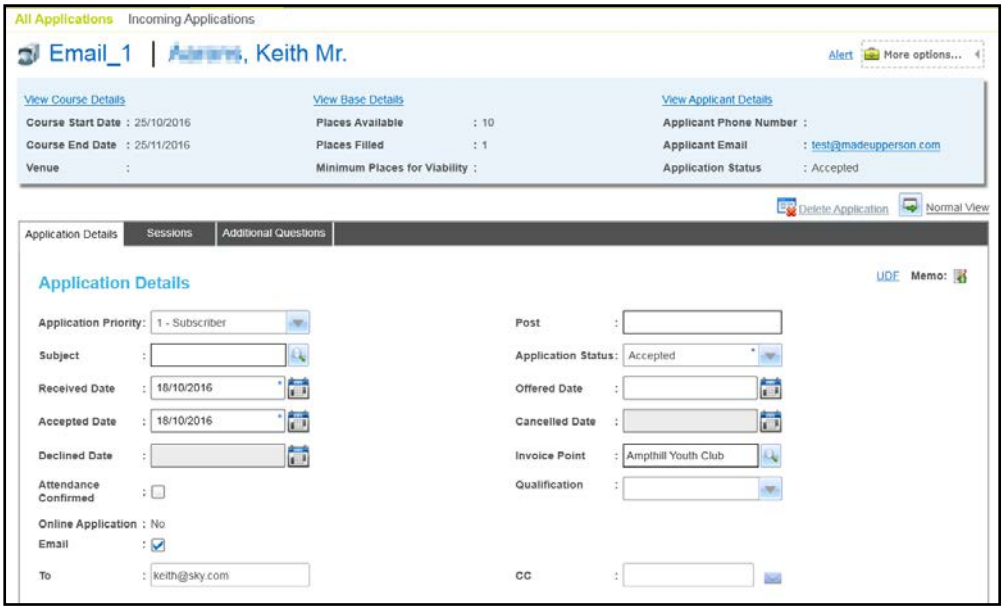
***NOTE:** If an applicant is an individual, the name is displayed without a hyperlink.*

Viewing Application Details

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

   For more information, see Viewing Course Applicants *on page 86.*

2. Click the **View Application** button to display the **Application Details** screen.



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 88*.

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

Removing an Applicant from a Session

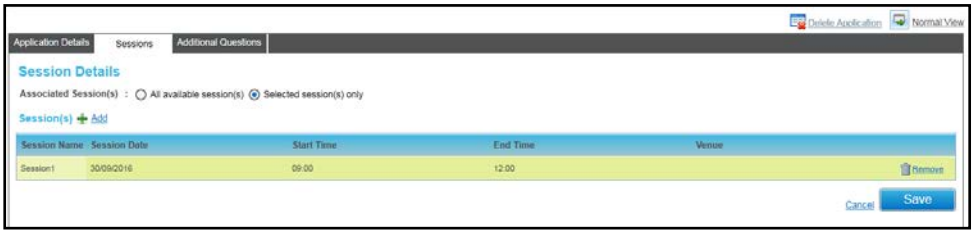
When an applicant is added to a multi-session course they are automatically assigned to all available sessions. If an applicant should not be assigned to all of the sessions, they can be removed from the session.

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 88*.
3. Select the **Sessions** tab to display the **Session Details** page.

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

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



6. Click the **Save** button.

Updating an Applicant's Details

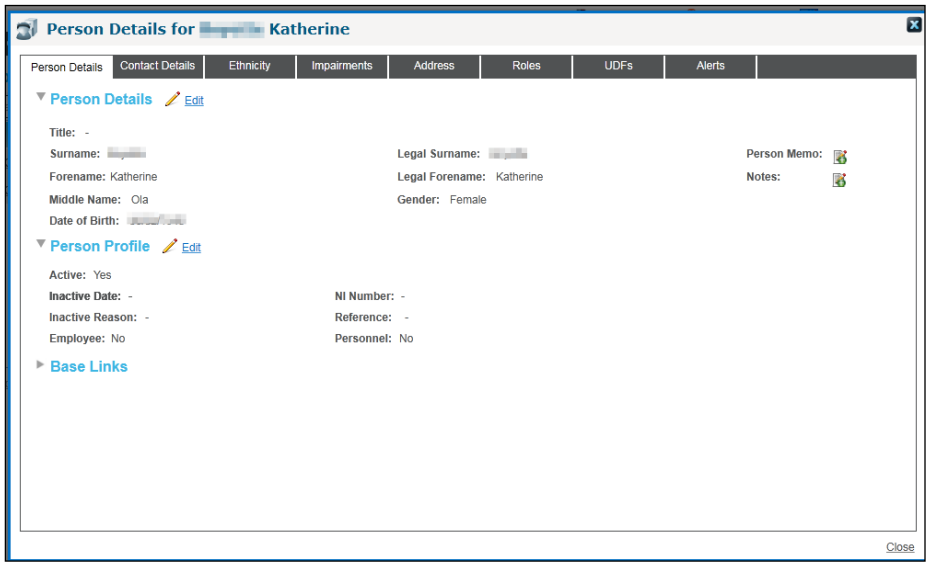
The applicant can be a person, student or individual.

If the applicant is a student, their student details can be updated.

If the applicant is a person, their person details, contact details, ethnicity, impairments, address history, UDFs and Alerts can be updated.

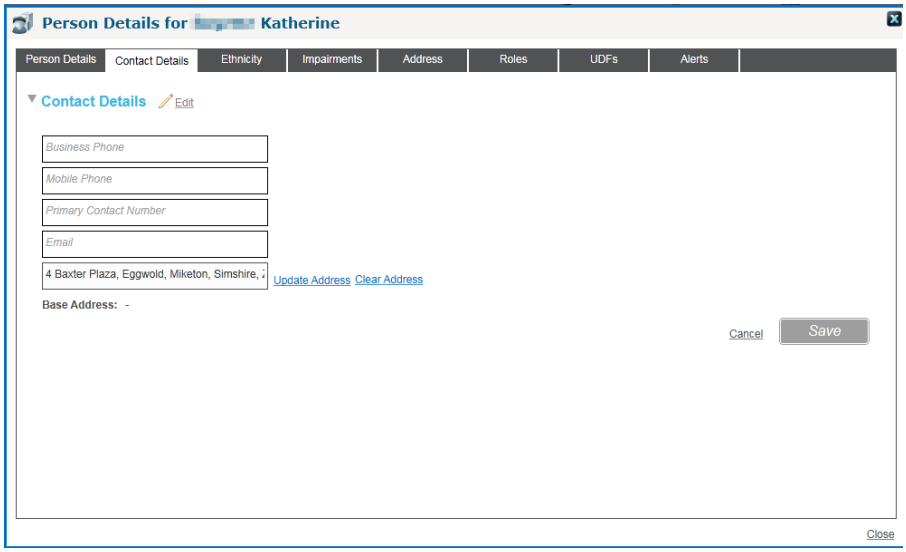
Updating Person Details

1. View the course applicants and click the name hyperlink to display the **Person Details** dialog. For more information, see Viewing Course Applicants *on page 86*.



2. Select the required tab and click the **Edit** button to display the details in edit mode.

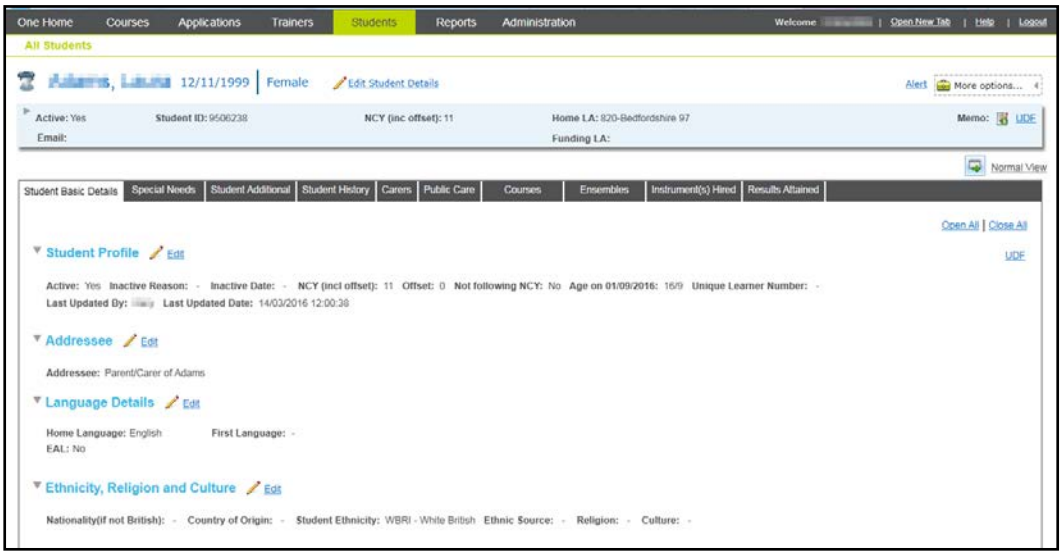
The following graphic displays the **Contact Details** in edit mode:



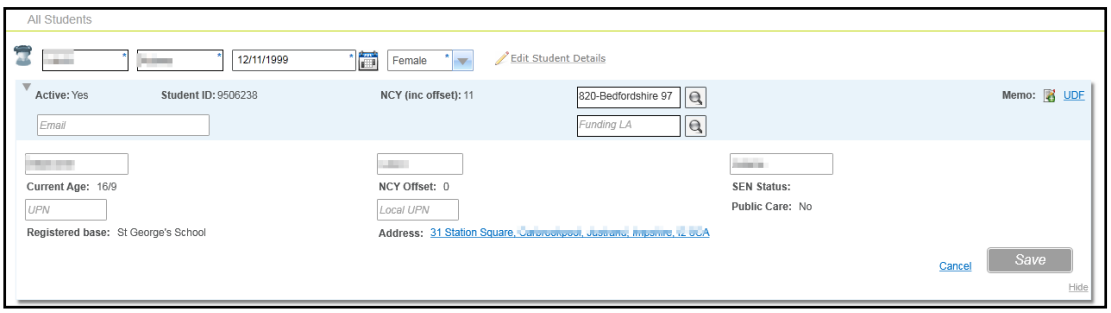
3. Update the details and click the **Save** button.

Updating Student Details

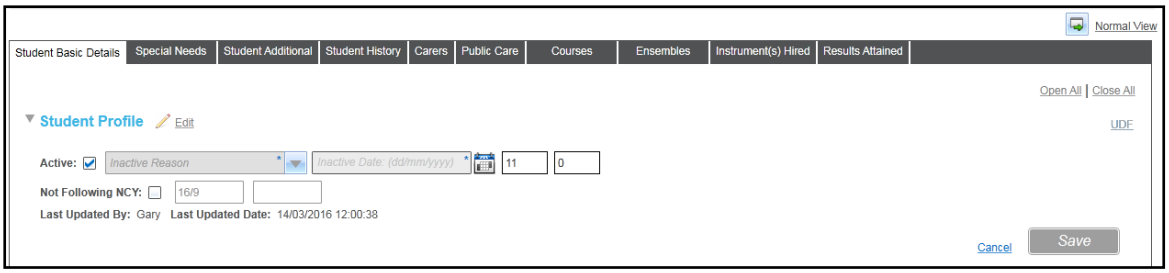
1. View the course applicants and click the name hyperlink to display the **Students | All Students** page. For more information, see Viewing Course Applicants *on page 86*.



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:



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

Updating an Applicant's Session Details

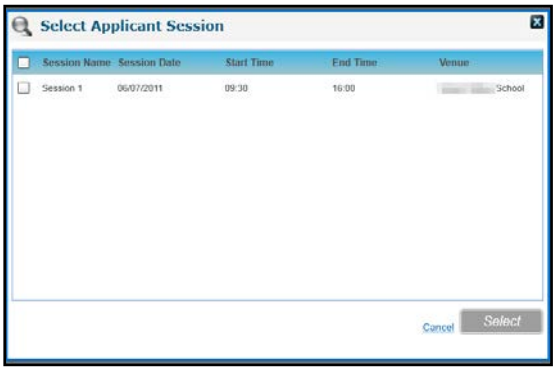
The session details can be updated to reflect whether the applicant is attending all sessions or selected sessions only.

> ***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 82.*

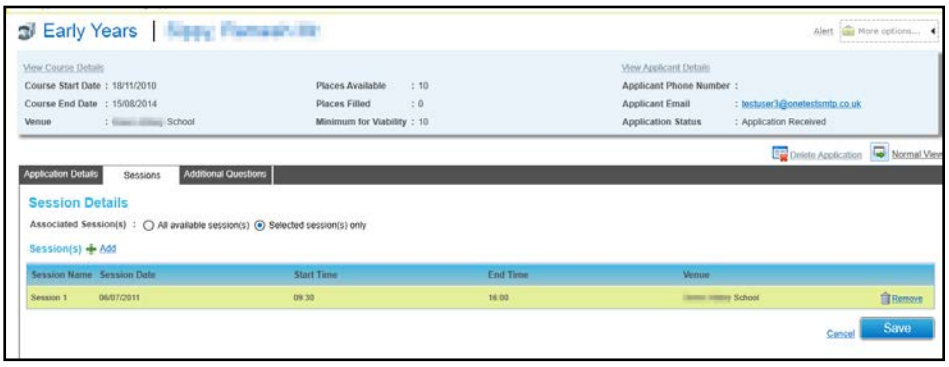
1. Open the details for the required applicant.

   For more information, see Viewing Application Details *on page 88*.

2. If required, click the **Selected sessions(s) only** radio button to display the **Select Applicant Session** dialog.



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



4. 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 24*
Managing Additional Questions *on page 80*.

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

1. Open the application details.

   For more information, see Viewing Application Details *on page 88*.

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

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

Processing an Application

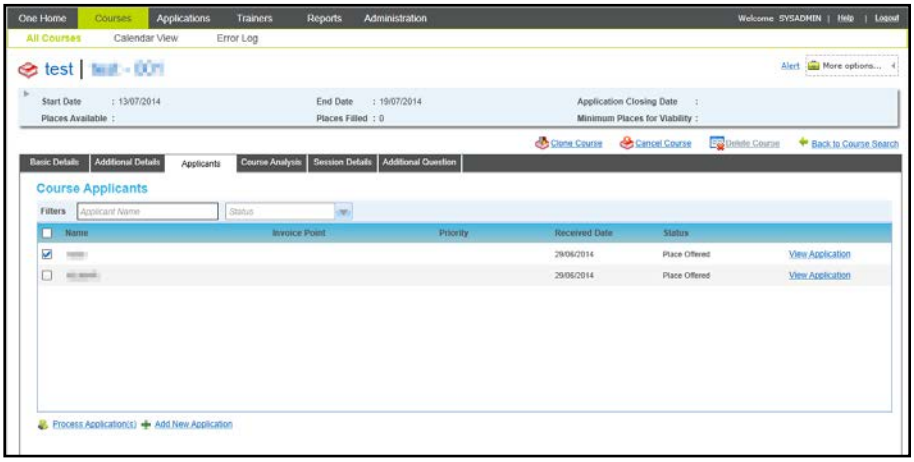
Applications for a course can be processed via the **Courses | Applicants** area. The status of the applications can be changed or the applications can be transferred to an alternative course.

Changing the Status of an Application

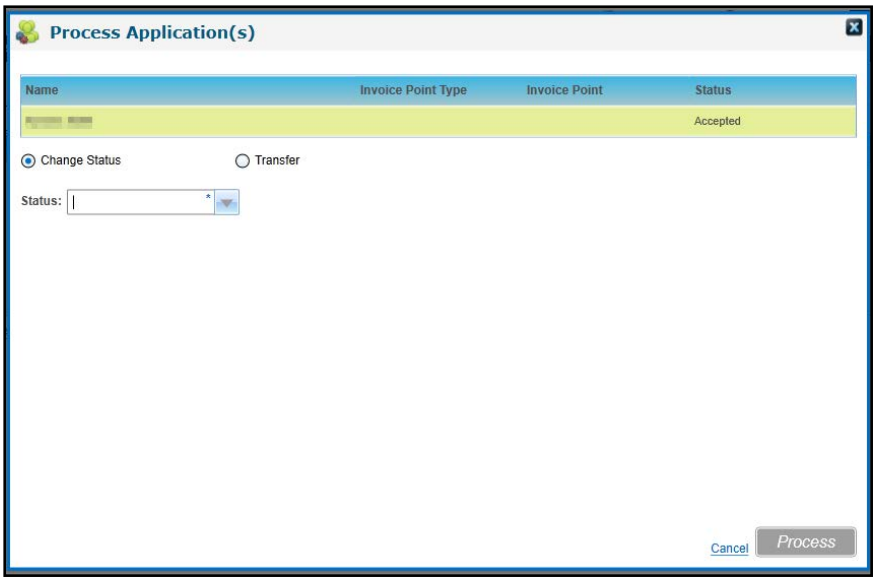
The status of one or more applications can be changed.

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

   For more information, see Viewing Course Applicants *on page 86*.



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.

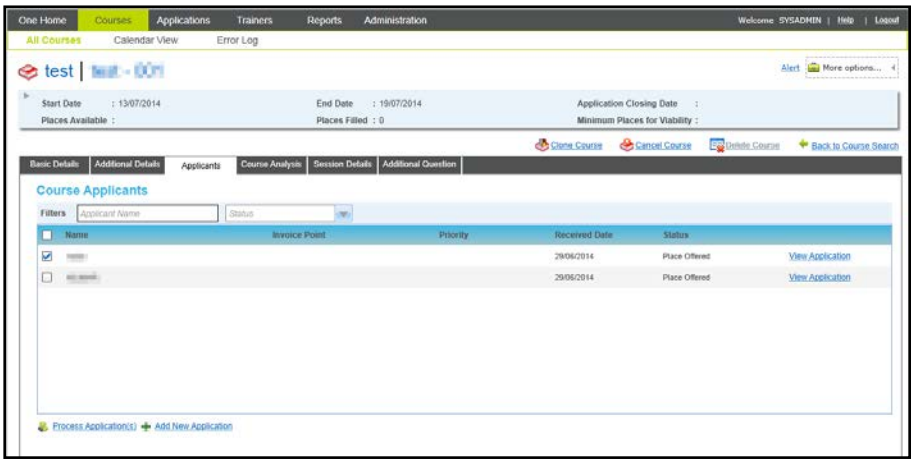
> ***NOTES:*** *An application* ***Status*** *of* ***Invoiced***, ***Cancelled*** *or* ***Transferred*** *cannot be changed to* ***Applicant Declined*** *or* ***Authority Declined****.*

Transferring an Application

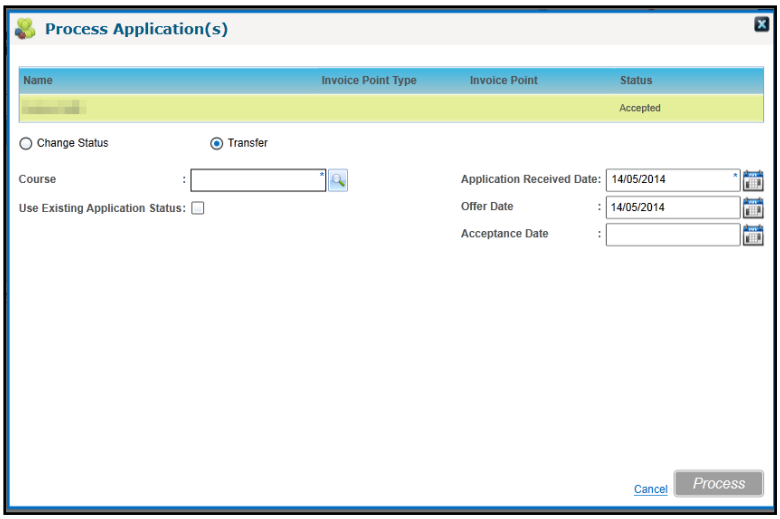
Applications can be transferred to another course.

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

   For more information, see Viewing Course Applicants *on page 86*.



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 114*.

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 *23*.

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.

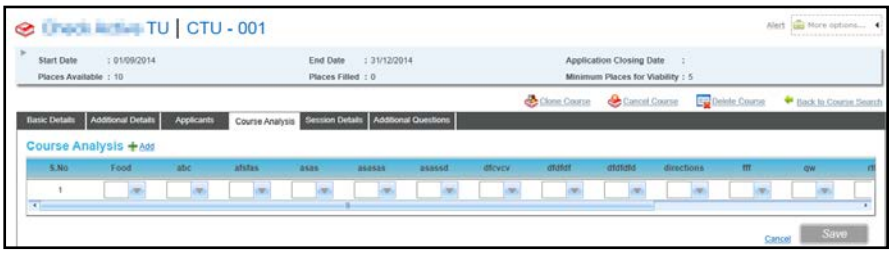
   For more information, see Searching for a Course *on page 73.*

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).*

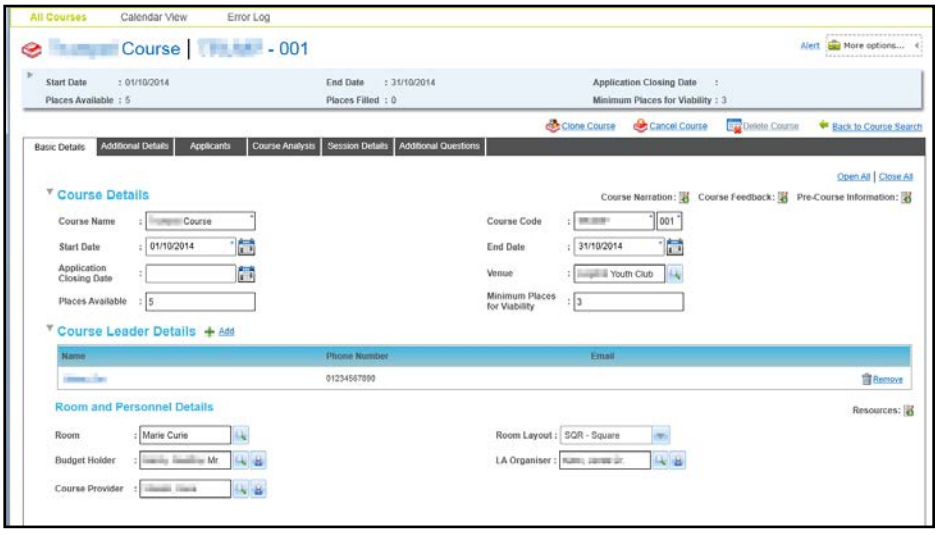
Cancelling a Course

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

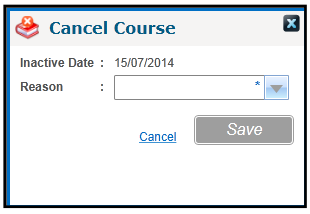
1. Search for the required course.

   For more information, see Searching for a Course *on page 73.*

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.

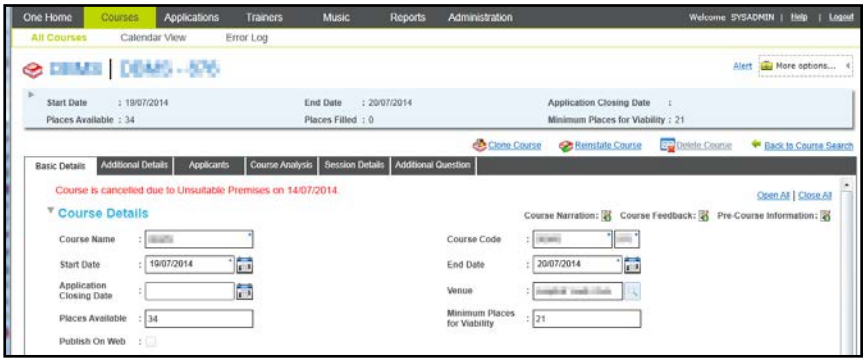
Reinstating a Course

A previously cancelled course can be reinstated.

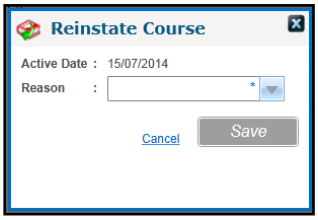
1. Search for the required course.

   For more information, see Searching for a Course *on page 73.*

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



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



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

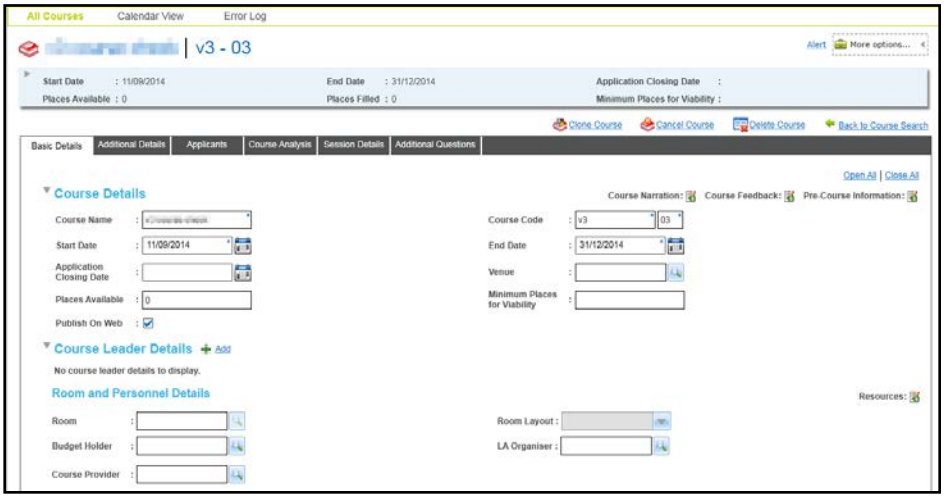
Deleting a Course

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 73.*

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



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 71*.

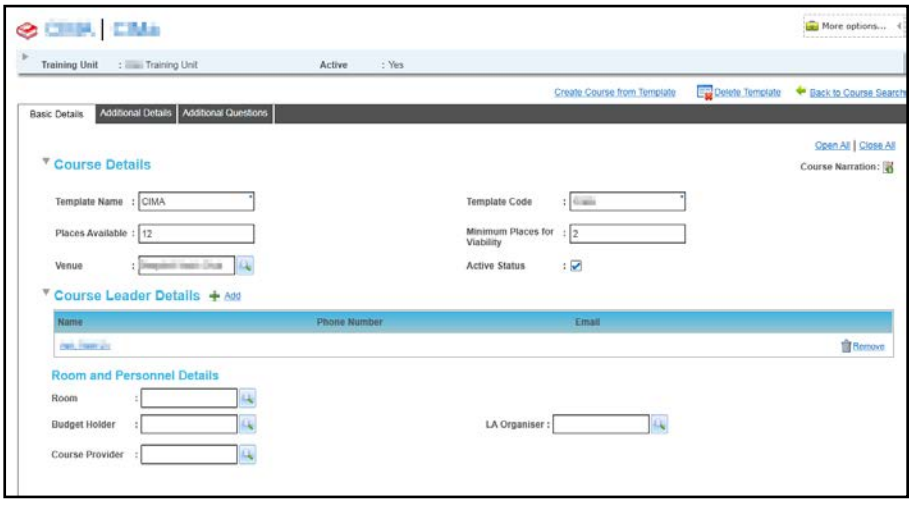
Viewing Course Template Details

1. Select the **Courses** area.
2. Ensure that the **All Courses** tab is selected.
3. Select the **Template Only check box.**
4. Enter your search criteria. For more criteria, click the **More Options** button to display the **More Search Options** window.
5. 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 97*.

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

Editing the Basic Template Details

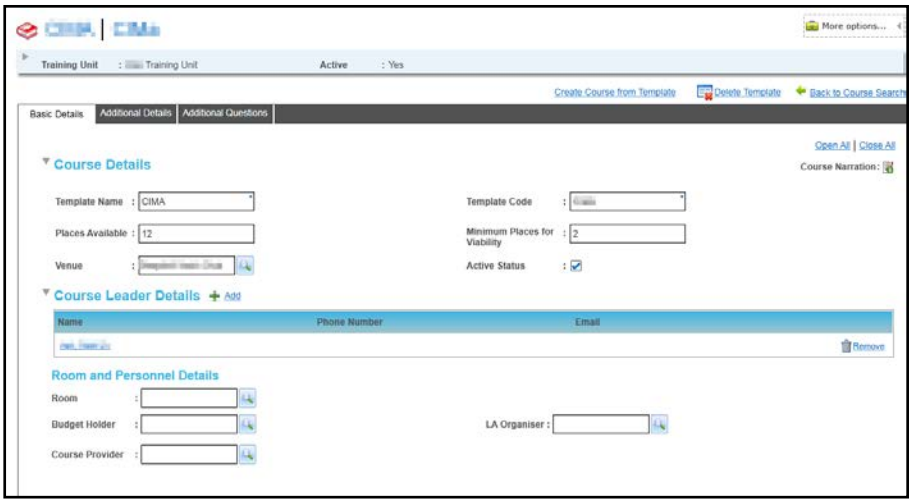
The **Basic Details** tab enables you to edit course details, course leaders, room details and personnel details.

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

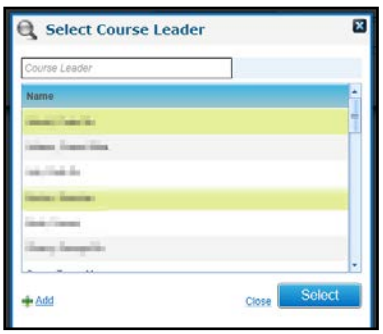
Adding New Course Leaders

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.

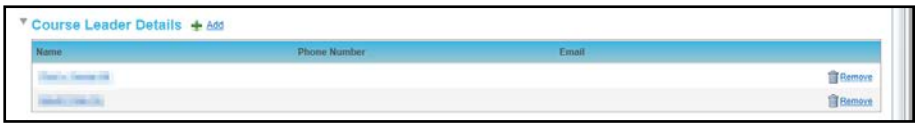


2. Click the **Add** button on the **Course Leader Details** panel to display the **Select Course Leader** window.



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

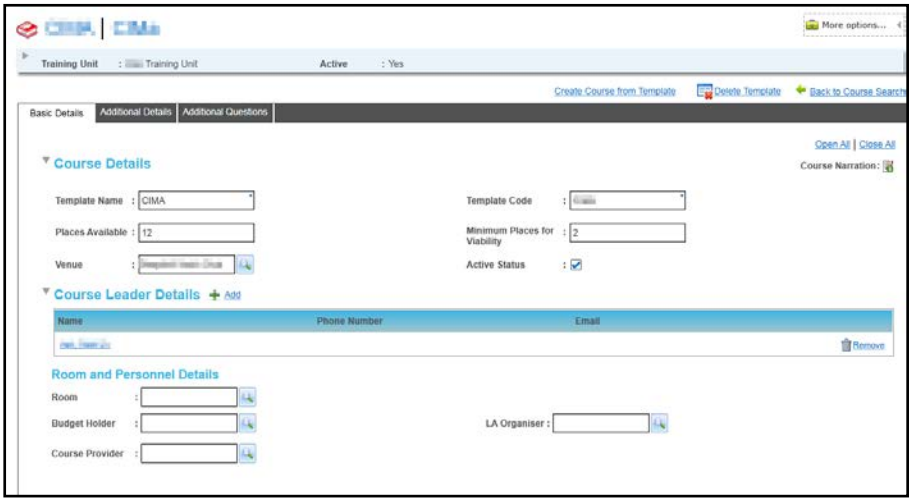
If the required course leader is not listed, click the **Add** button to display the **Person Search**. For more information, see Selecting a Person using Person Search on page *37*.



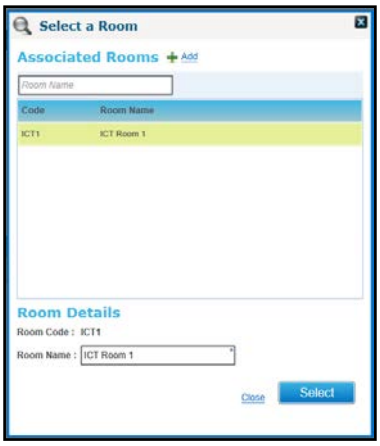
Updating Room and Personnel Details

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.

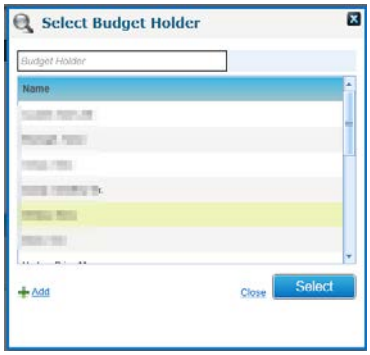
4. Click the **Save** button.

Updating Personnel Details

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

Selecting a Budget Holder

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



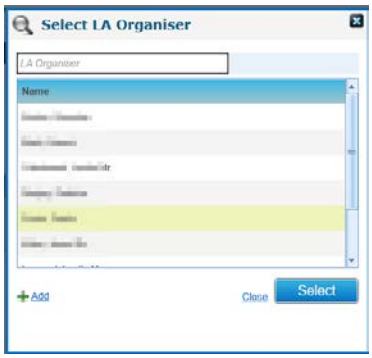
All people that have been assigned the role of Budget Holder are listed.

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 *37*.

Selecting an LA Organiser

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



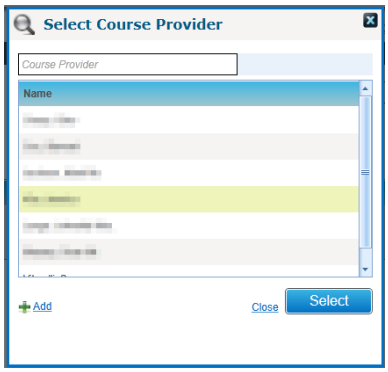
All people that have been assigned the role of LA Organiser are listed.

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 *37*.

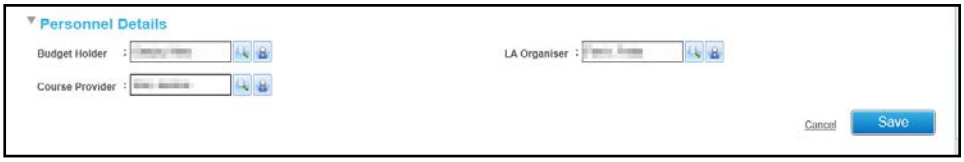
Selecting a Course Provider

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.

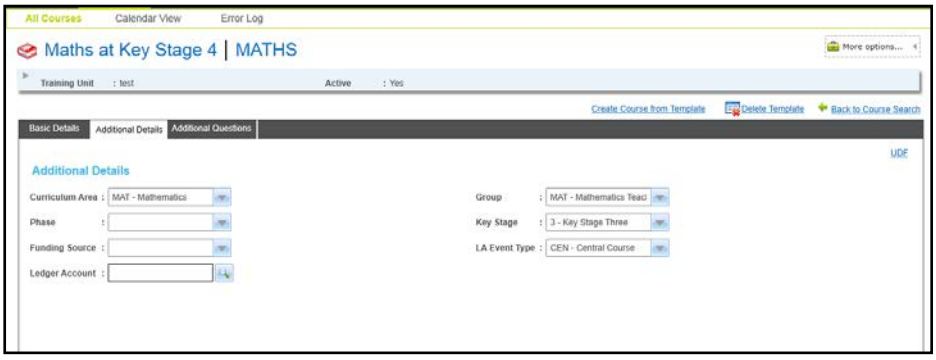
   For more information, see Selecting a Person using Person Search on page *37*.



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 97.
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**

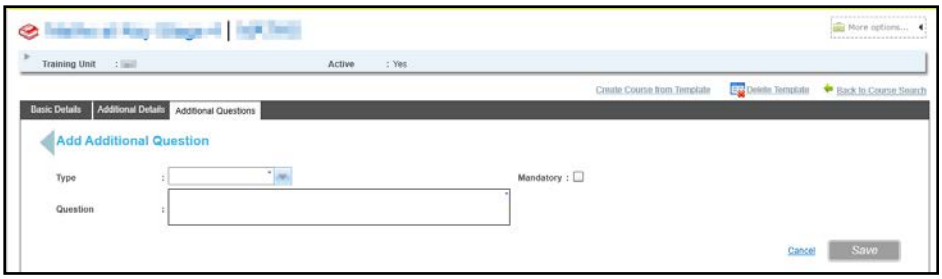
4. Click the **Save** button.

Adding Additional Questions to a Template

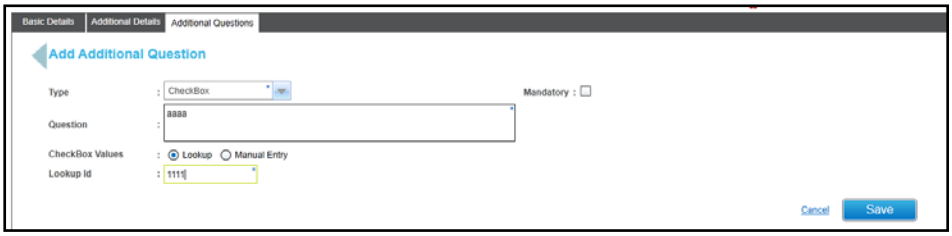
When a template is created, it automatically inherits any additional questions configured for the respective training unit. After creating the template, you can modify, add or remove any of these questions from the template.

1. Search for a course template and view the template details. For more information, see Viewing Course Template Details on page *97*.
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.

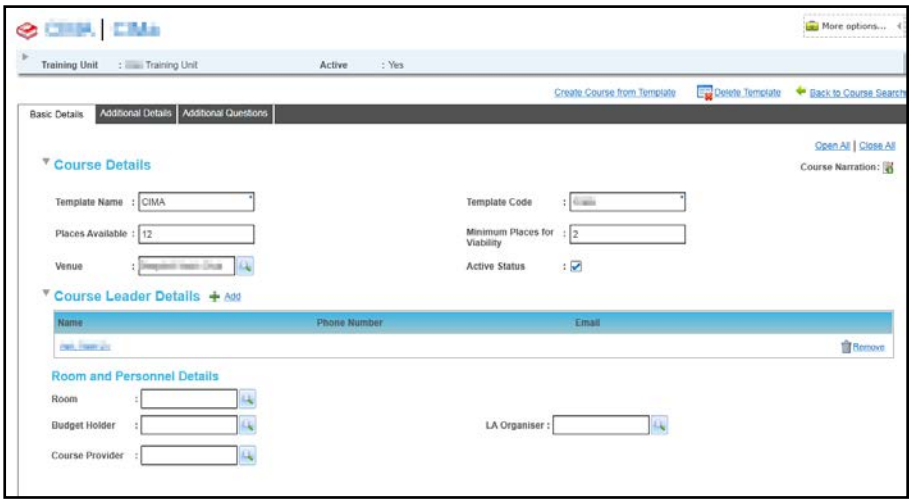
Creating Course Details from a Template

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 74.

1. Search for a course template and view the template details.

   For more information, see Viewing Course Template Details on page *97*.



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 or venue.

Viewing Courses in Calendar View

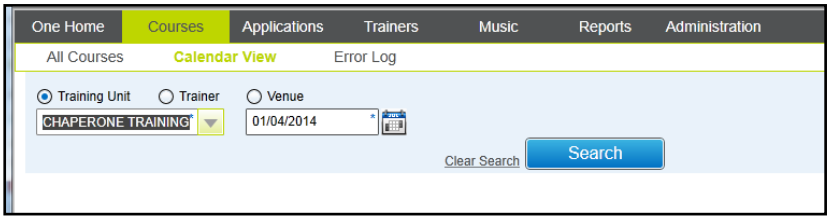
1. Select the **Courses** area.
2. Select the **Calendar View** tab.
3. Select the required radio button to view courses for a **Training Unit**, **Trainer** or **Venue**.

More Information:

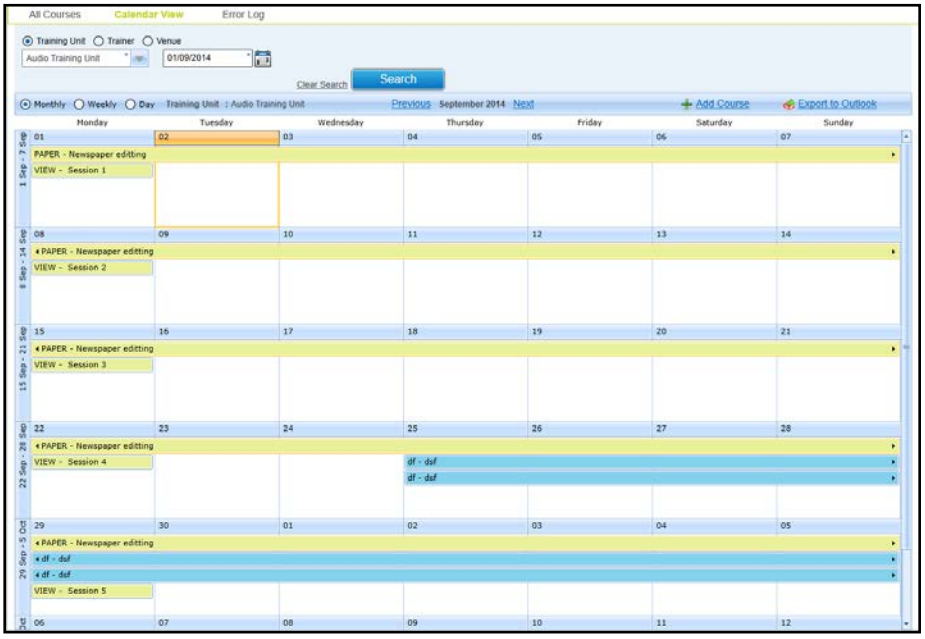
Viewing Courses for a Training Unit *on page 103.*
Viewing Courses for a Trainer *on page 104.*
Viewing Courses for a Venue on page 105.

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.



Courses are colour coded depending on the status:

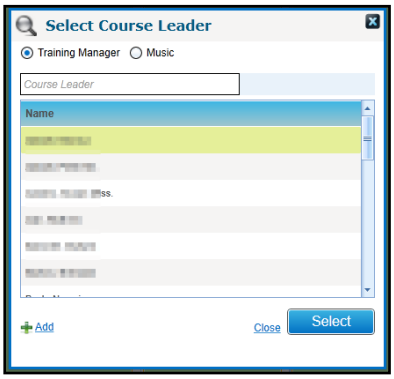
- Green – completed.
- Yellow – in progress.
- Blue – planned.
- Red – cancelled.

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 **Training Manger** radio button to display a list of Training Manager course leaders.

b. Select the required **Course Leader** and click the **Select** button.

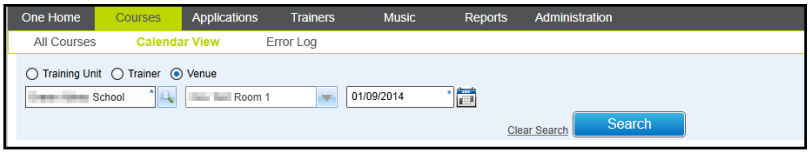
3. Select the required date.
4. Click the **Search** button to display the **Monthly** planner showing all courses for the selected trainer and month.

   Courses are colour coded depending on the status:

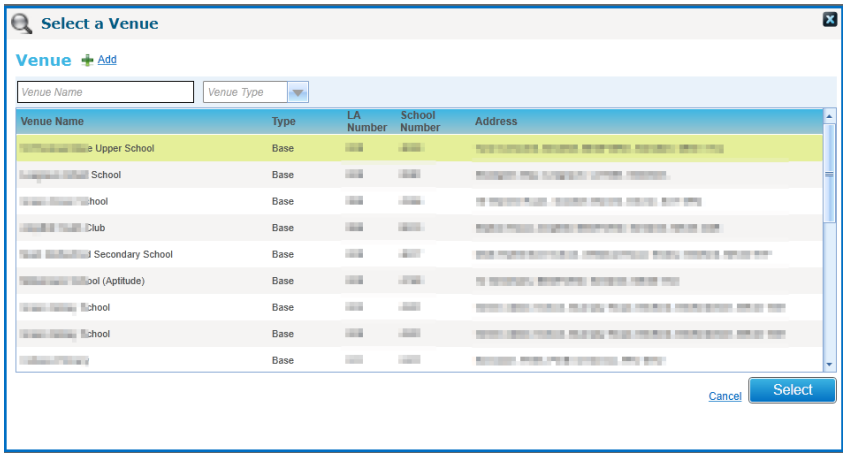
   - Green – completed.
   - Yellow – in progress.
   - Blue – planned.
   - Red – cancelled.
5. If required, select the **Weekly** radio button to display the weekly planner or the **Day** radio button to display the daily planner.

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.



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



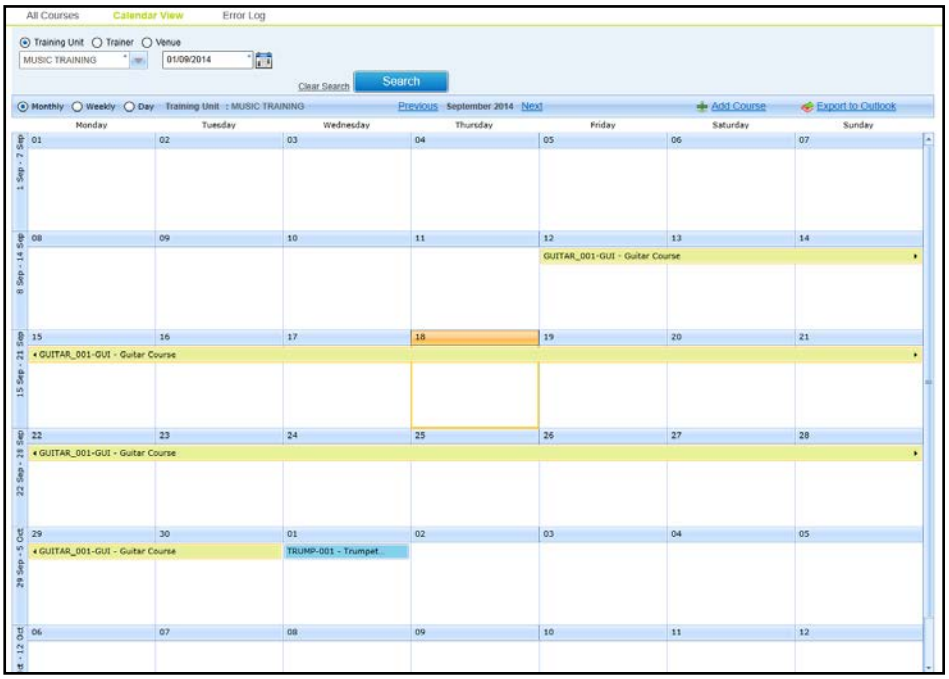
The list can be filtered by entering a full or partial **Venue Name** or selecting a **Venue Type** from the drop-down list.

3. Select the required **Venue** and click the **Select** button.
4. If required, select a **Room Name** from the drop-down list.
5. Select a **Search Date**.
6. Click the **Search** button to display the **Monthly** planner showing all courses for the selected venue and month.
7. 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 103*.
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

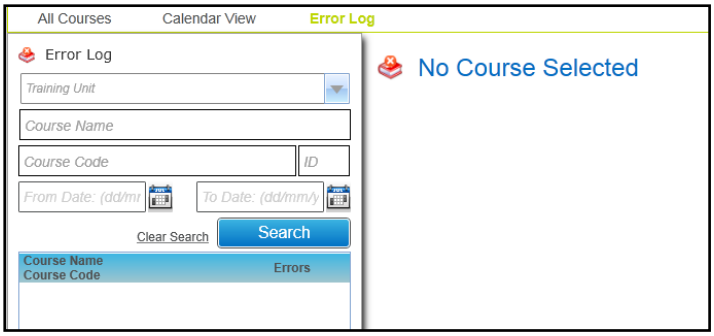
1. Search for courses in calendar view. For more information, see Viewing Courses in Calendar View *on page 103*.
2. Click the **Add Course** button to display the **Add New Course** screen.

3. Enter details for the new course and click the **Create Course** button. For more information, see Entering New Course Details *on page 72.*

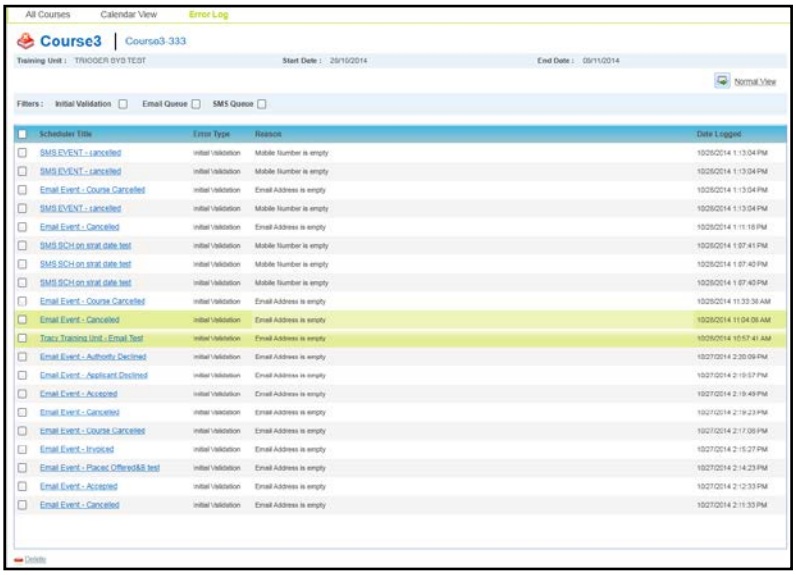
Managing the Courses Error Log

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 .

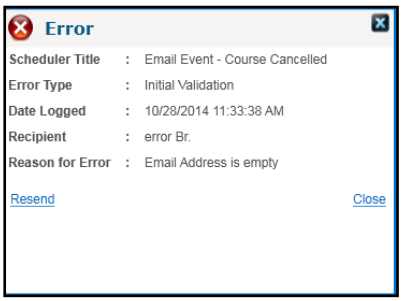
1. Select the **Courses** area.
2. Select the **Error Log** page.



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.

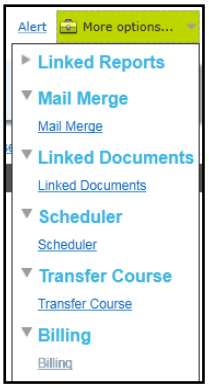


7. Correct the missing data.
8. Click the **Resend** button.

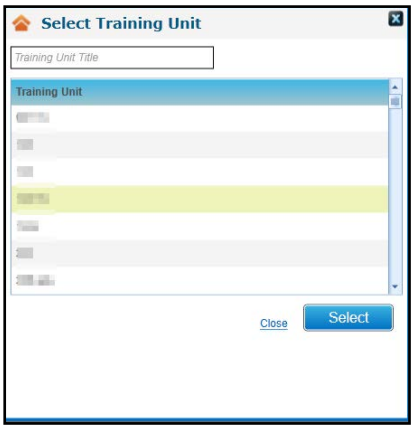
Transferring a Course

A course can be transferred to a different training unit. When you select a new training unit for the course, it will no longer be available in the original training unit.

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 **Transfer Course** link to display the **Select Training Unit** dialog.



5. Select the required **Training Unit**.
6. Click the **Select** button.

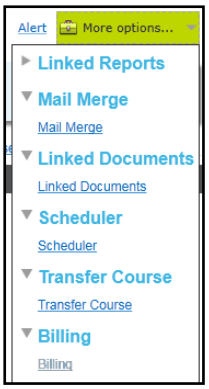
A confirmation message is displayed.

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**.

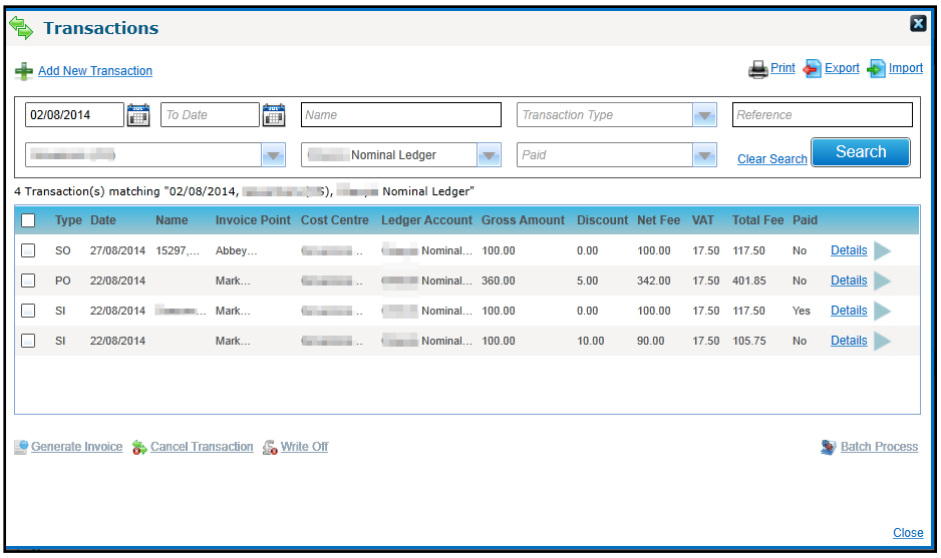
Viewing Transactions for a Course

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.*

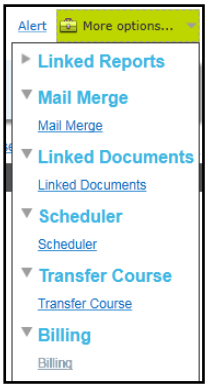
4. Click the **Billing** link to display transactions for this course.



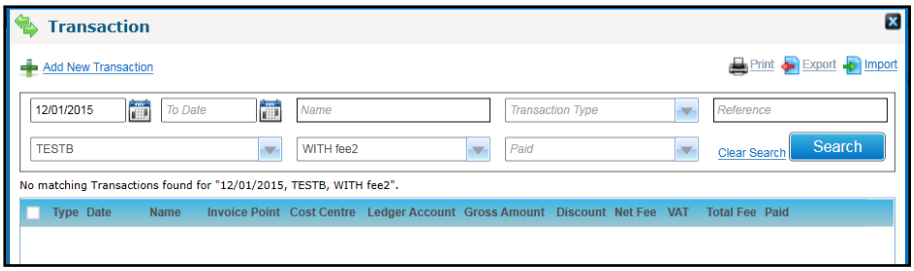
Creating Transactions for a Course

***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 130.*

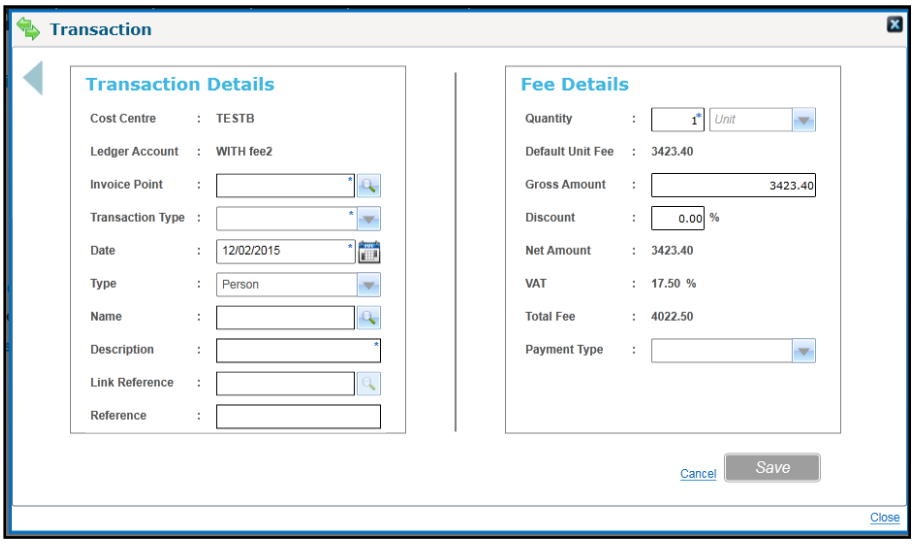
1. Search for a course using either the **All Courses** or **Calendar View** tab.
2. Select the required course to view the details.
3. Click the **More options** button to display the drop-down list of options.



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

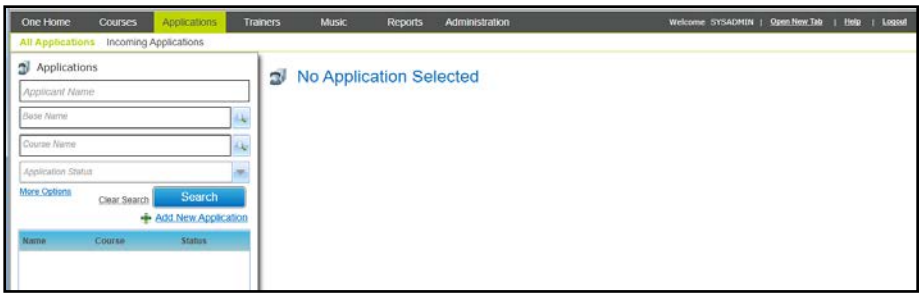
Introduction to Managing Applications

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

The **All Applications** tab is used to view and process applications for Training Manager courses added via v4 Online.

The **Incoming Applications** tab is used to process applications received via the Citizen or Provider portal.

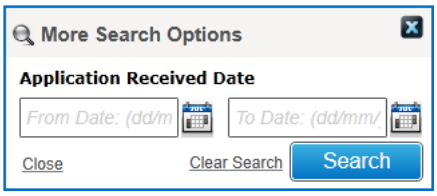
Viewing Applications



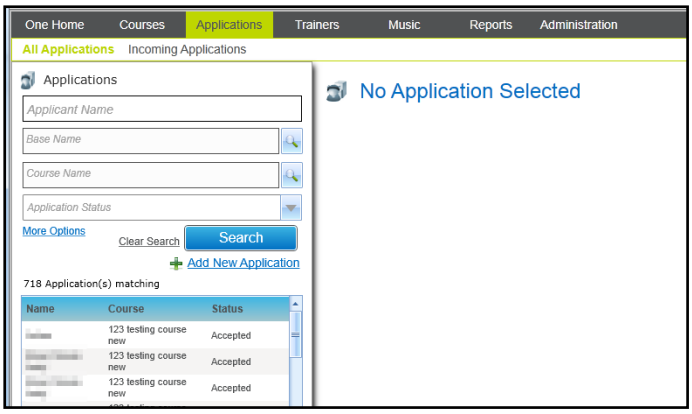
1. Select the **Applications** area.
2. Ensure the **All Applications** tab is selected.
3. If required, enter search criteria as follows:
   a. Enter a full or partial **Applicant Name**.
   b. For applications raised by a base, click the **Base Name** browse button to display the **Base Search** window.

      For more information, see Viewing Applications Reserved for a Base *on page 112*.
   c. Click the **Course Name** browse button to display the **Select Course** window.

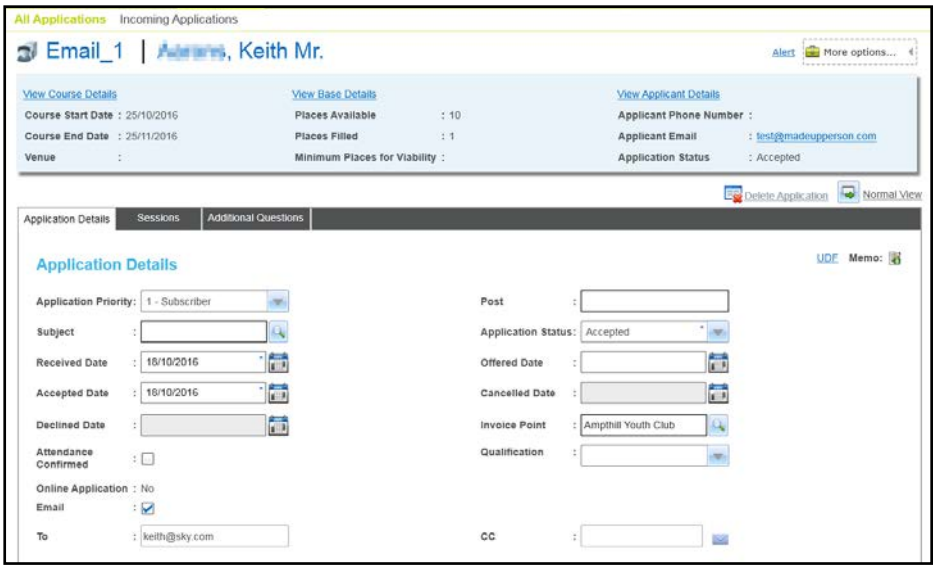
      For more information, see Selecting a Course *on page 114*.
   d. Select an **Application Status** from the drop-down list.
   e. Click the **More Options** button to display the **More Search Options** panel. Select an **Application Received Date** range and click the **Search** button.



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



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



> ***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 86.*

Viewing Applications Reserved for a Base

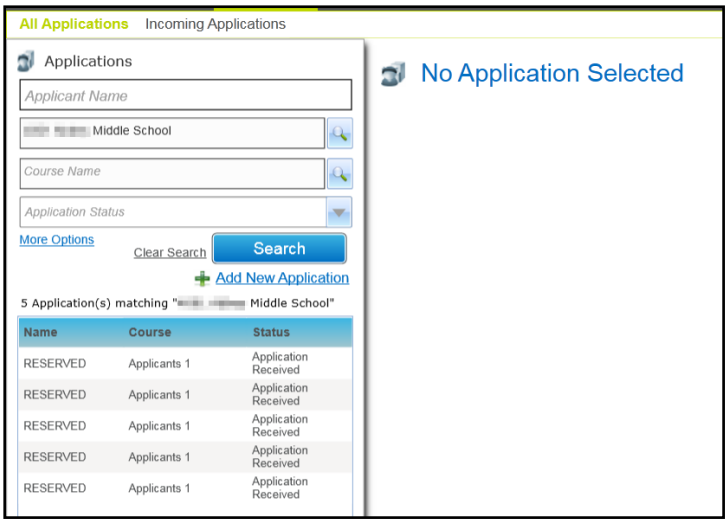
When an application is added, one or more places can be reserved for a base.

For more information, see Adding an Application *on page 131.*

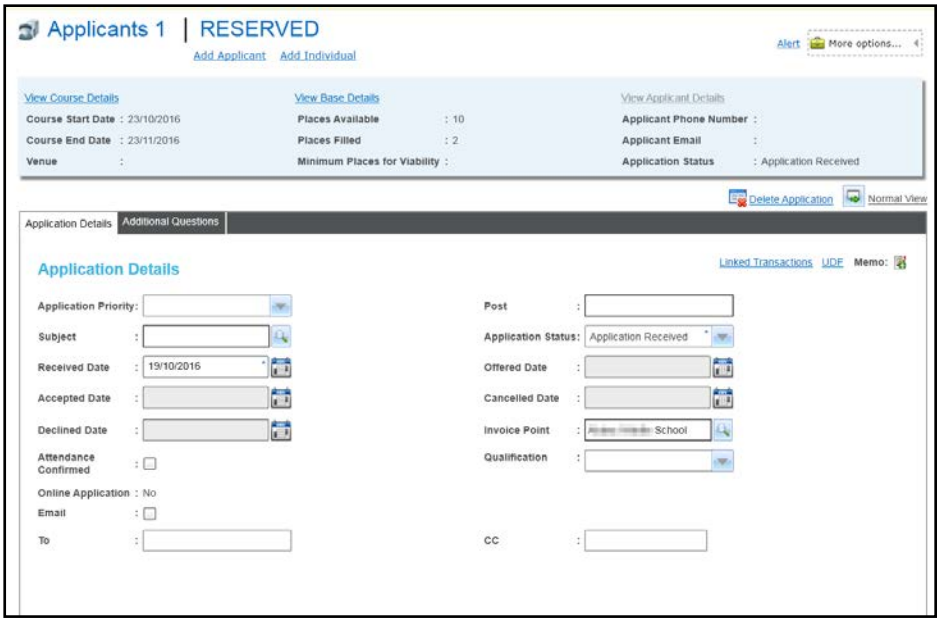
To view applications reserved for a base:

1. Select the **Applications** area.
2. Ensure the **All Applications** tab is selected.
3. Click the **Base Name** browse button to display the **Base Search** window and select a base.

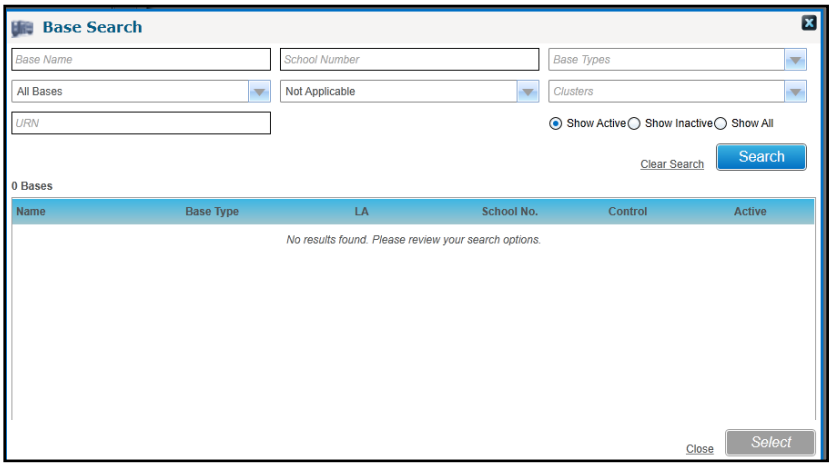
   For more information, see Selecting a Base *on page 113.*
4. Click the **Search** button to display a list of matching applications:



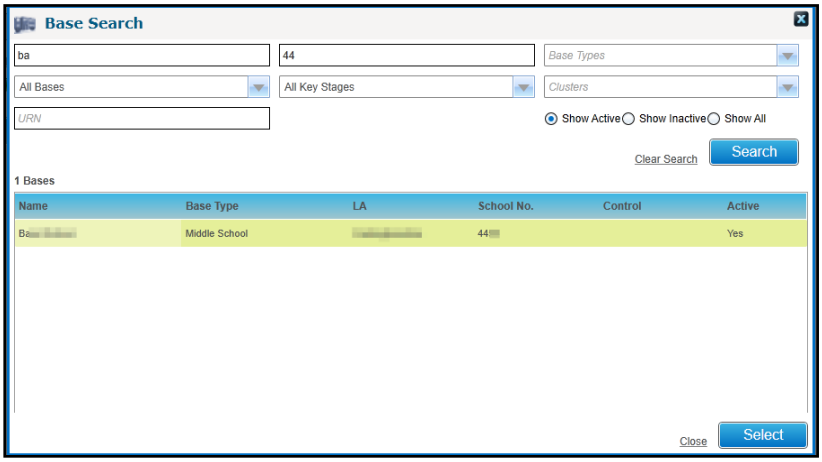
5. Select an application to display the details.



Selecting a Base



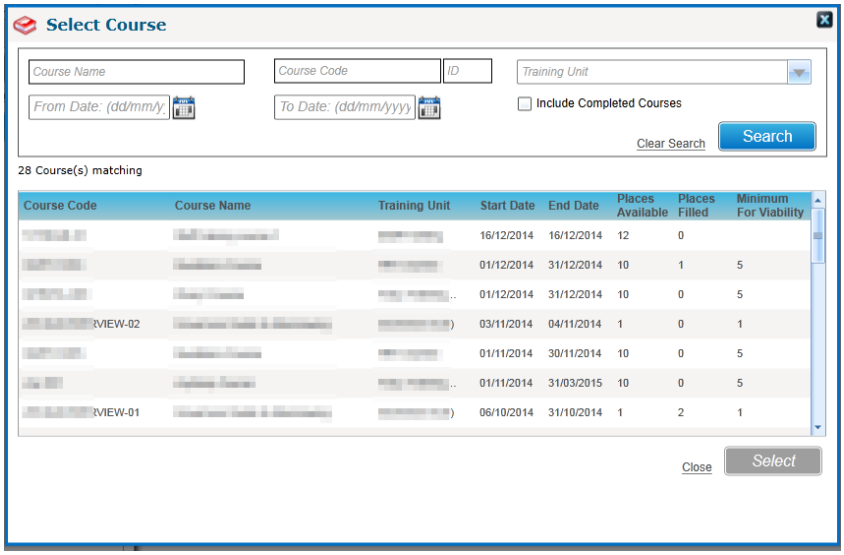
1. If required enter one or more search criteria:
   - **Base Name**
   - **School Name**
   - **Base Type** (*Table ID: 0070*)
   - **LA Bases**, **All Bases** or **None**
   - **Key Stage**
   - **Cluster**
   - **URN**
2. Click the **Search** button to display a list of matching bases.



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



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

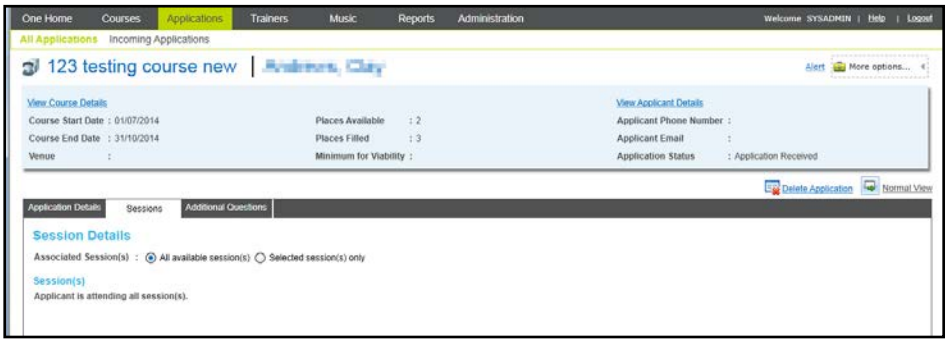
Viewing Sessions for an Application

1. Open the required application.

   For more information, see Viewing Applications on page *111*.

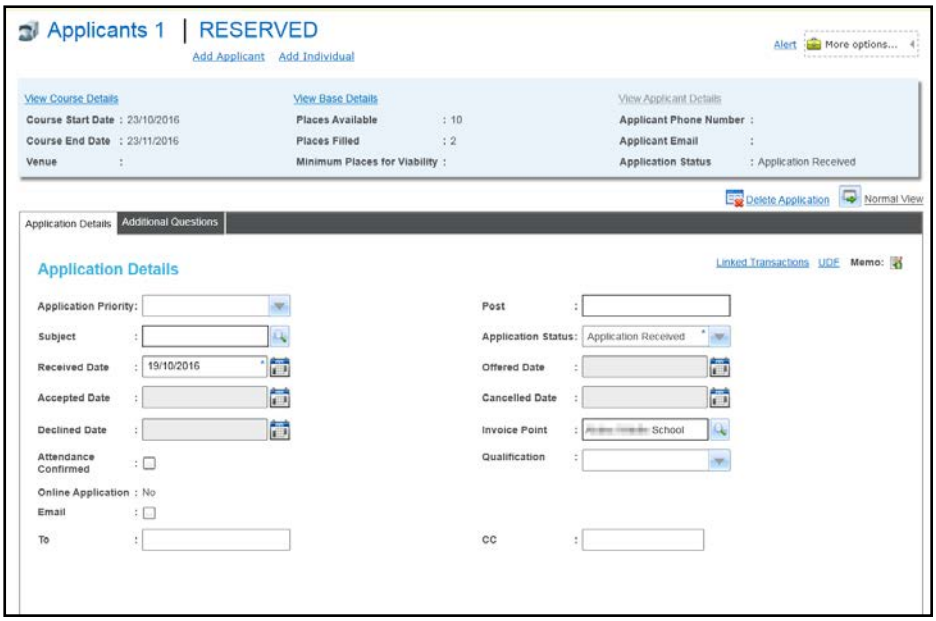
2. Select the **Sessions** tab to view the sessions for this application.

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

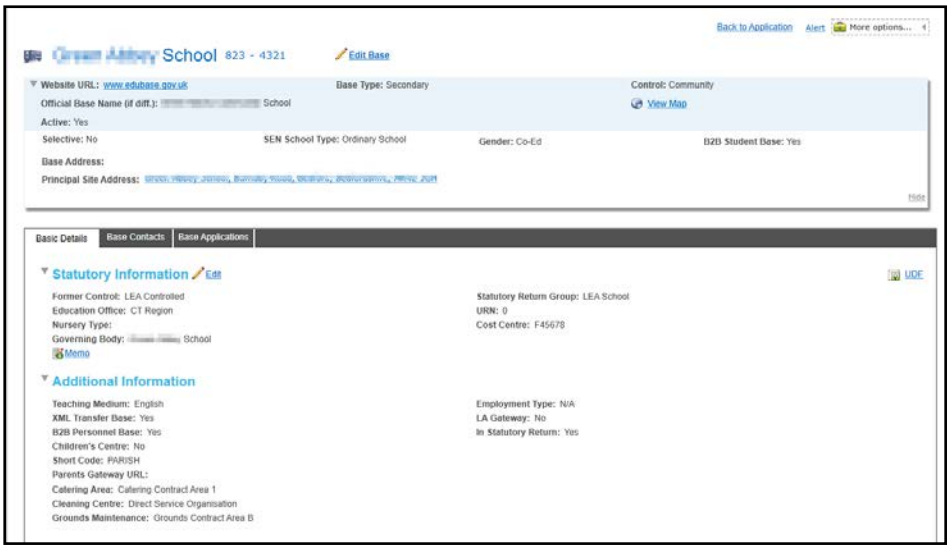


Viewing Base Details for an Application

An application can be created for a base and a number of places can be reserved. You can view the base details when you view the application.



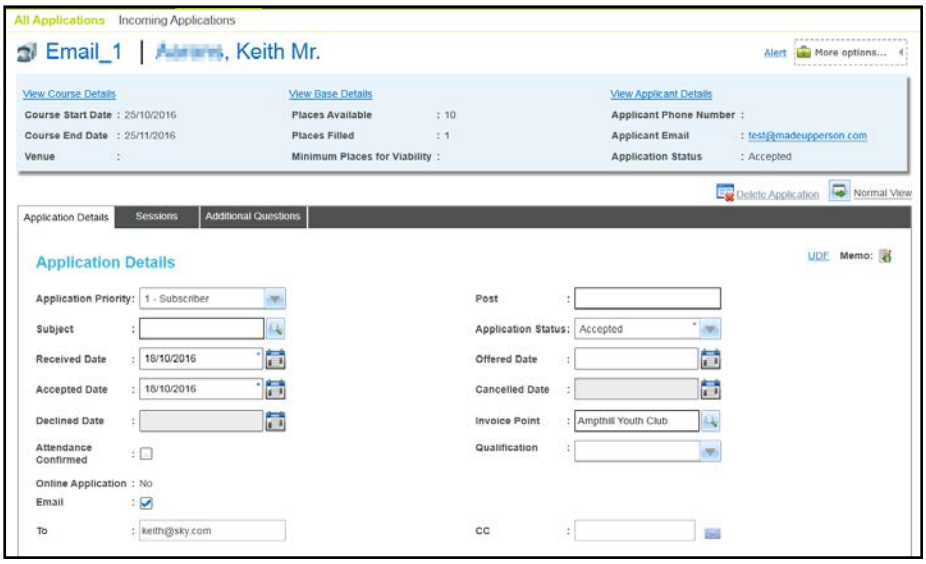
Click the **View Base Details** button to display the **Base Details** page.



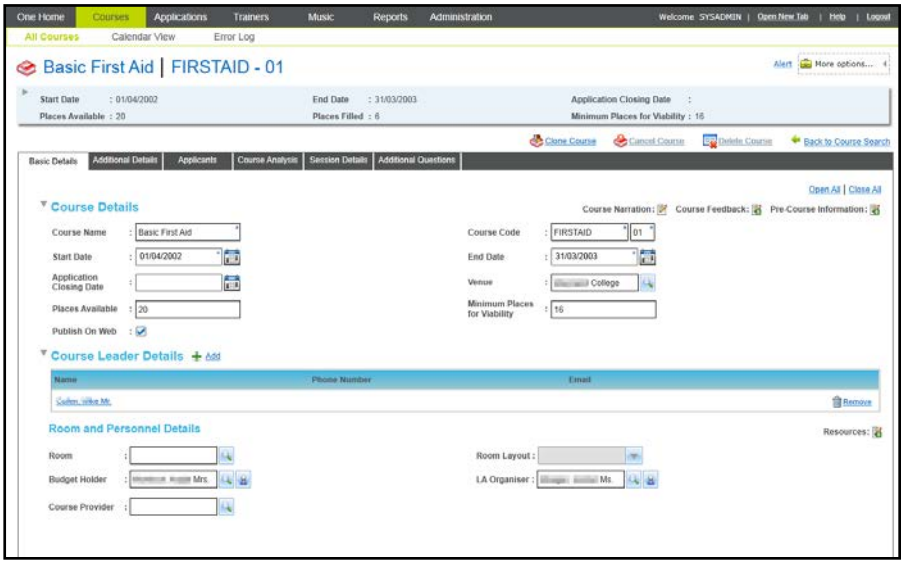
Viewing Course Details for an Application

1. Open the required application.

   For more information, see Viewing Applications on page *111*.

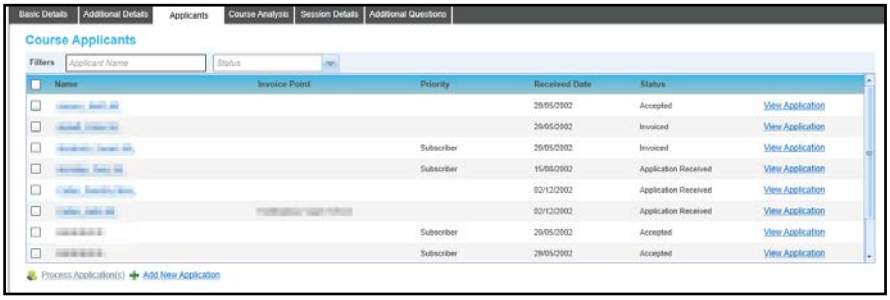


2. In the course summary panel, click the **View Course Details** button to display the course details.



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.

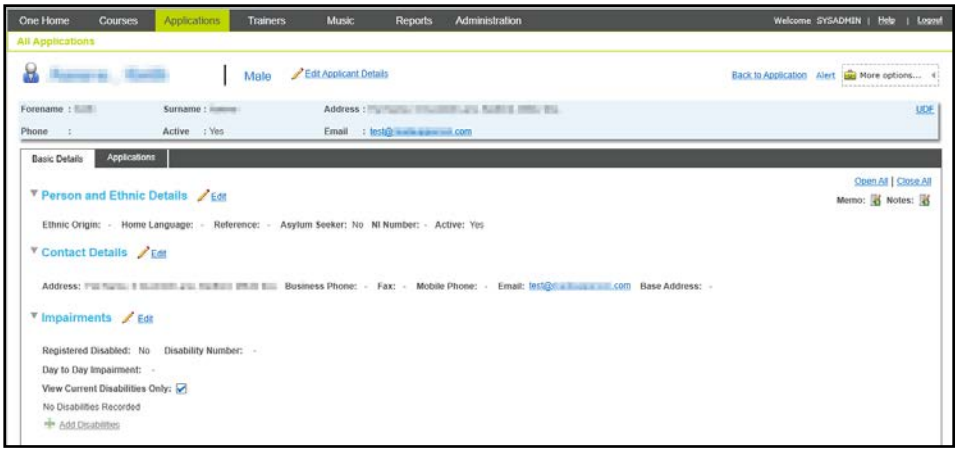
   For more information, see Viewing Applications on page *111*.

2. 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.

> ***NOTE:** If the application is for a base, the **View Applicant Details** button is not enabled. For more information, see Viewing Base Details for an Application on page 115.*

Viewing Applicant Details for a Person

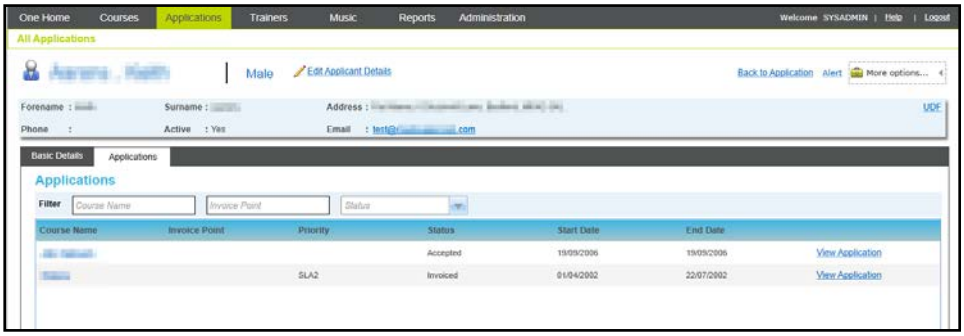
If the applicant is a person on the One database, clicking the **View Applicant Details** button displays their person **Basic Details** and Training Manager **Applications**.



While viewing the person **Basic Details** tab, you can:

- Click the **Edit Applicant 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.

3. If required, select the **Applications** tab to view all course applications for this applicant.



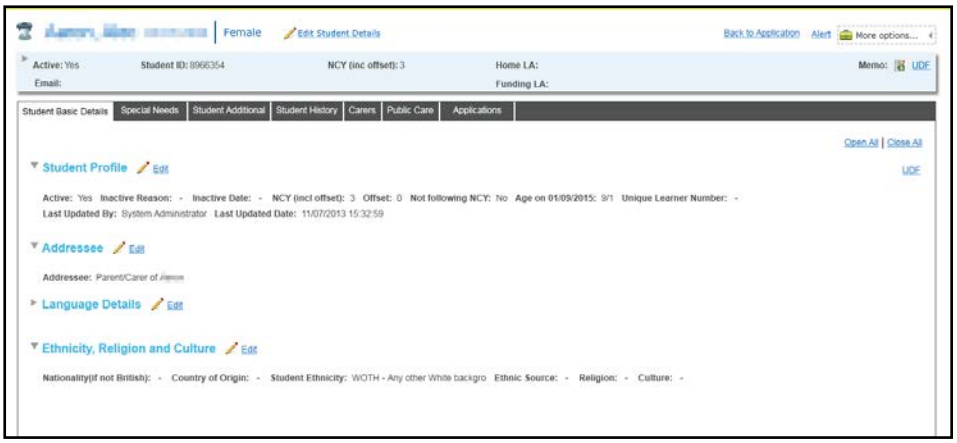
While viewing the course applications, you can:

- Click the **Course Name** link to display the course details.
- Click the **View Application** button to display the application details for the selected course.

> **More Information:**
> Editing Applicant Details (Person) *on page 124*.

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:

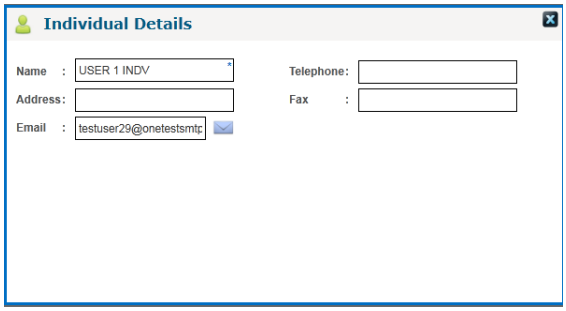
- Click the **Edit Student Details** button to edit the applicant summary details.
- Click the **Edit** button on the individual panels to edit these details.
- Click the **Back to Application** button to return to the application details.

More Information:

Editing Applicant Details (Student) *on page 126*
Viewing Applications *on page 111.*

Viewing Applicant Details for an Individual

If the applicant is an individual, clicking the **View Applicant Details** button displays the Individual Details window.



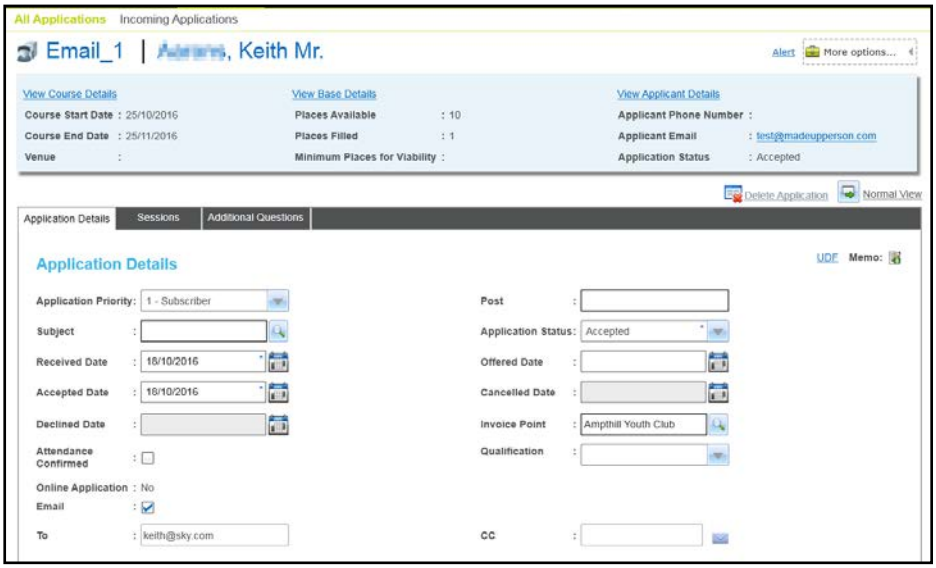
More Information:

Editing Applicant Details (Individual) *on page 129*
Viewing Applications on page *111*

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.*

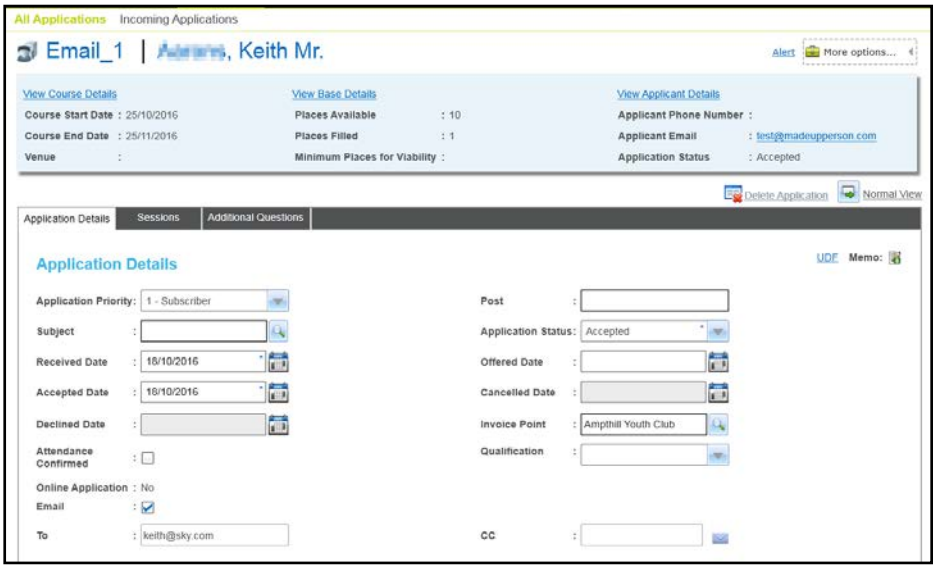


Click the **Linked Transactions** link to display the **Transactions** dialog displaying transactions for this application.

Editing an Application

Open the required application.

For more information, see Viewing Applications *on page 111*.

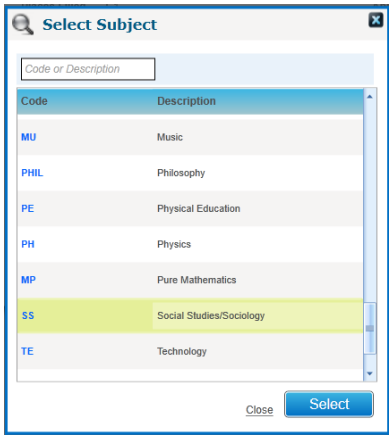


Editing Application Details

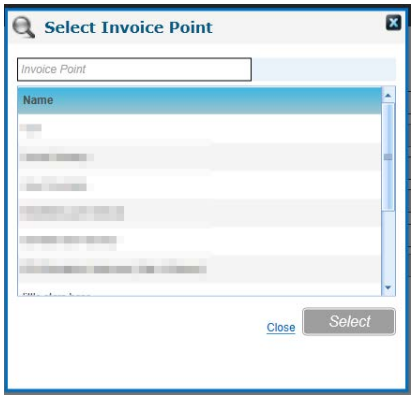
1. Select an **Application Priority** from the drop-down list.

> ***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 **Subject** browse button to display the **Select Subject** dialog.



4. Select the required subject 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.



8. Select the required **Invoice Point** and click the **Select** button.
9. Select a **Qualification** from the drop-down list.
10. If required, select the **Attendance Confirmed** check box.
11. If required, select the **Email** check box and enter a **To** and **CC** email address.
12. Click the **Save** button.

Creating a Sales Order Transaction Linked to the Application

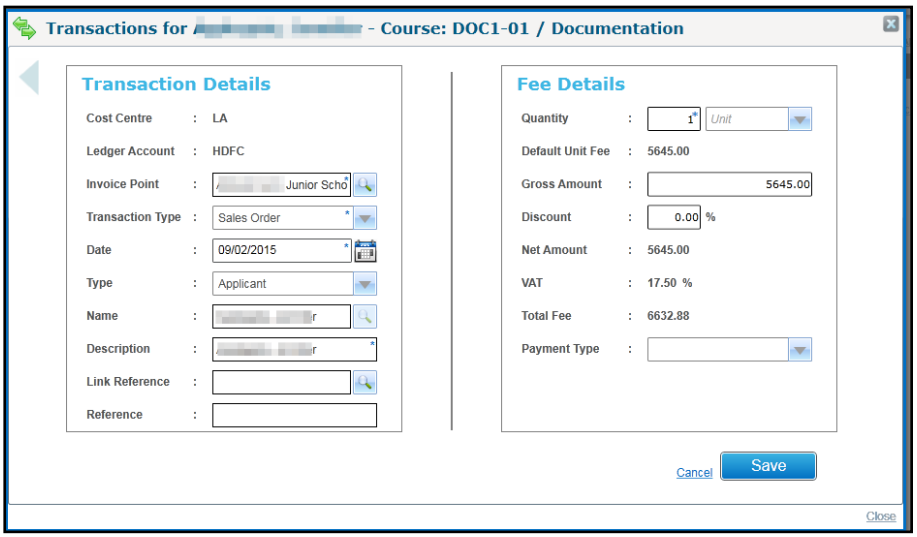
When you save changes to an application, you can create a pre-populated sales order transaction linked to the application, if the following conditions apply:

- 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 115.*

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

2. To include all available sessions:

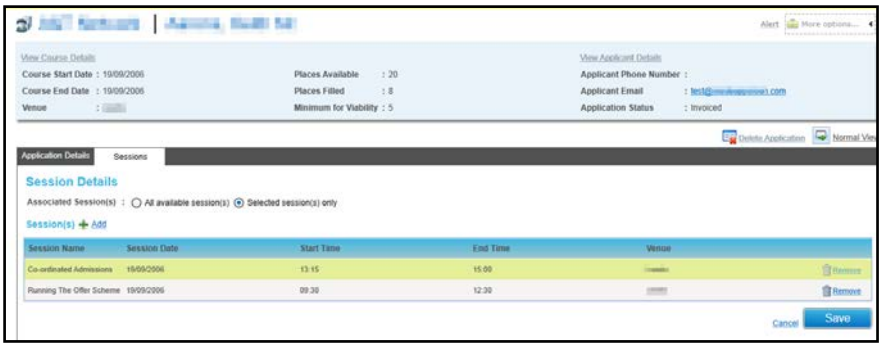
   a. Select the **All available sessions** radio button.

   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.

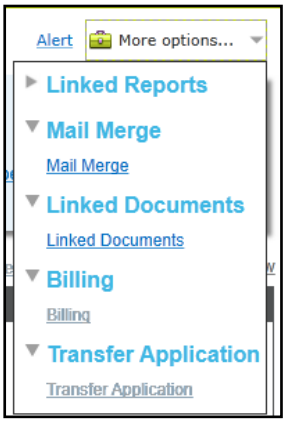
Transferring an Application

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

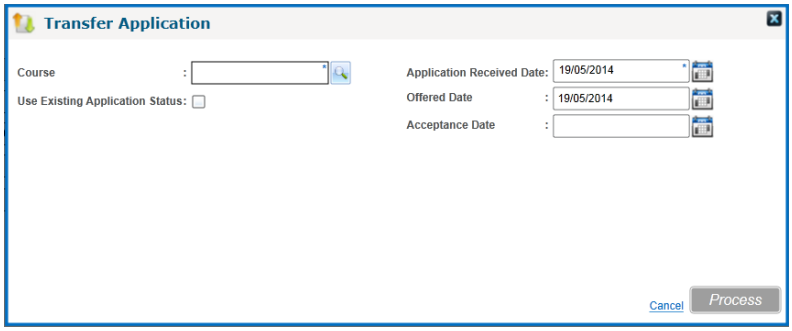
1. Open the required application.

   For more information, see Viewing Applications on page *111*.

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 *114*.

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.

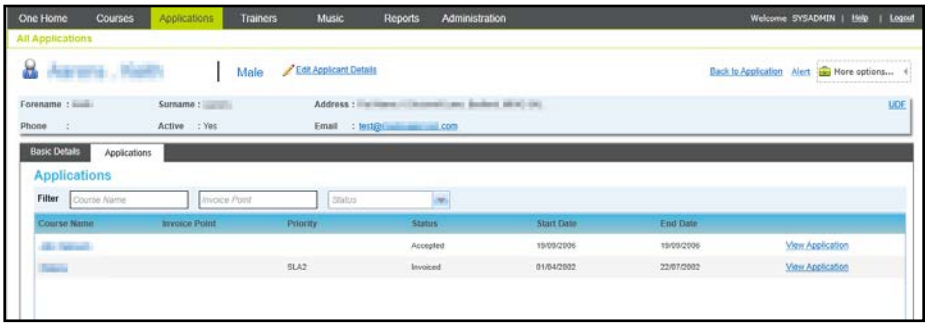
> ***NOTE:*** *You can also transfer an applicant to a different course via the* ***Courses | All Courses*** *menu route.*

Editing Applicant Details (Person)

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

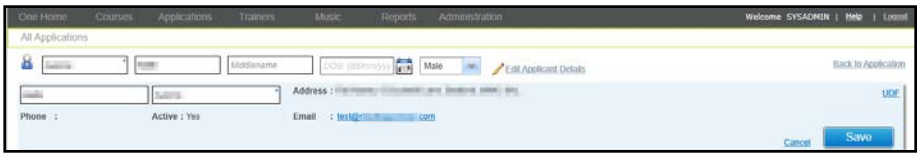
Editing Applicant Summary Details

1. Open the applicant details.



For more information, see Viewing Applicant Details *on page 117*.

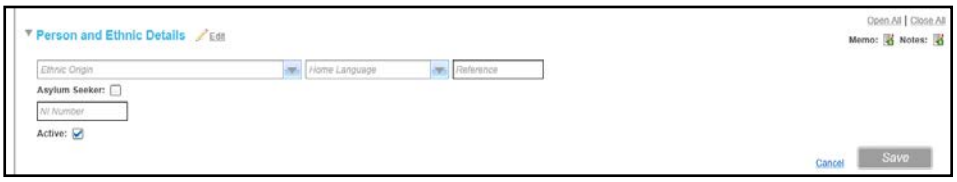
2. Click the **Edit Applicant Details** button to display the applicant summary details in edit mode.



3. If required, edit the applicant name, **Date of Birth** or **Gender**.
4. Click the **Save** button.

Editing Person and Ethnic Details

1. Click the **Edit** button on the **Person and Ethnic Details** panel to display the panel in edit mode.



2. If required, edit the details as follows:
   - **Ethnic Origin** (lookup table ID: 0695)
   - **Home Language** (lookup table ID: 002)
   - **Reference**
   - **Asylum Seeker**
   - **NI Number**.
3. 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. The address details can be edited as follows:
   a. Click the **Select Current Address** browse button to display the **Address Manager** window.
   b. Enter a **Post code** or partial address and click the **Search** button.
   c. Select the required address and click the **Select** button.

   For more information, see Selecting an Address *on page 45.*
3. If required, enter a **Business Phone** number, **Fax** number, **Mobile Phone** number and **Email** address.
4. If required, enter a **Base Address**.
5. Click the **Save** button.

Editing Impairment Details

1. Click the **Edit** button on the **Impairments** panel to display the panel in edit mode.

   a. If required, edit the **Registered Disabled** check box, **Disability Number, Day to Day Impairment**.
2. If required, click the **Add Disabilities** button to display additional fields:

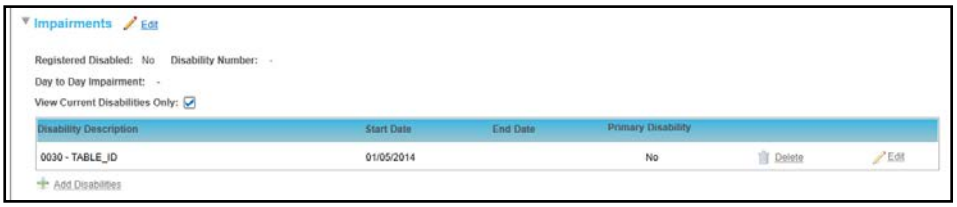
a. Select a **Disability Description** from the drop-down list (Lookup table ID: 0030).

b. Select a **Start Date** for the disability.

c. If required, select an **End Date**.

d. If required, select the **Primary Disability** check box.

3. Click the **Save** button.

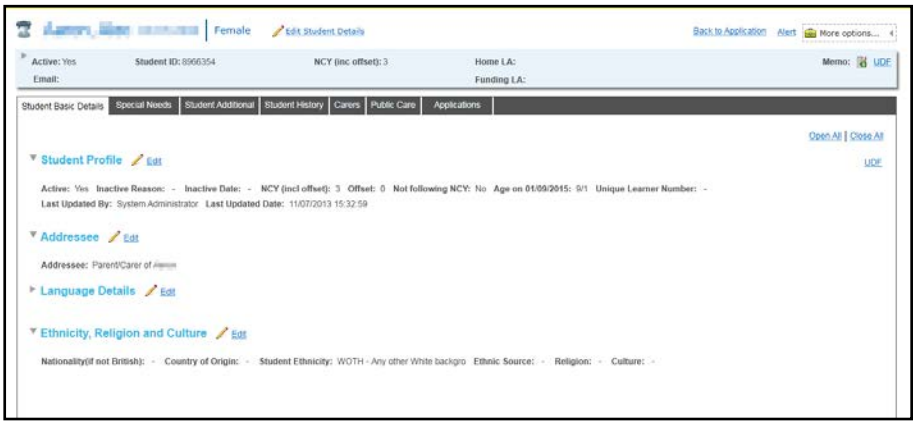


Editing Applicant Details (Student)

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

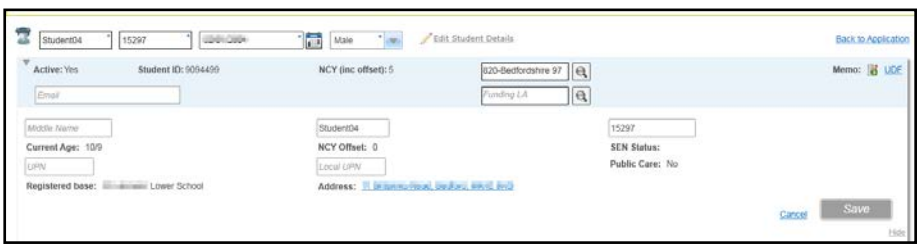
Editing Applicant Summary Details

1. Open the applicant details.



For more information, see Viewing Applicant Details *on page 117*.

2. Click the **Edit Student Details** button to display the applicant summary details in edit mode.



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

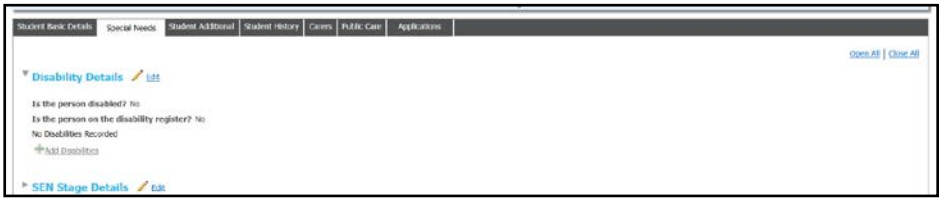
The **Student Basic Details** page consists of **Student Profile**, **Language Details** and **Ethnicity, Religion and Culture**.

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**.**

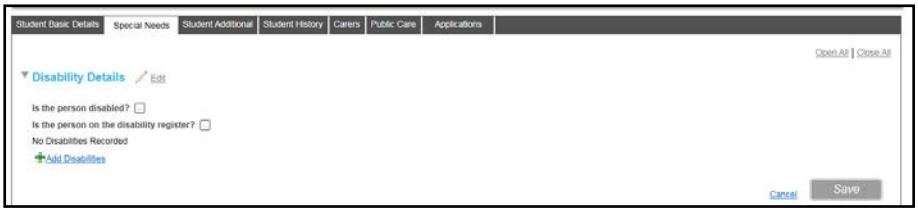
Editing Student's Special Needs

The **Special Needs** tab page consists of **Disability Details** and **SEN Stage Details**.



You can edit the **Disability Details** as follows:

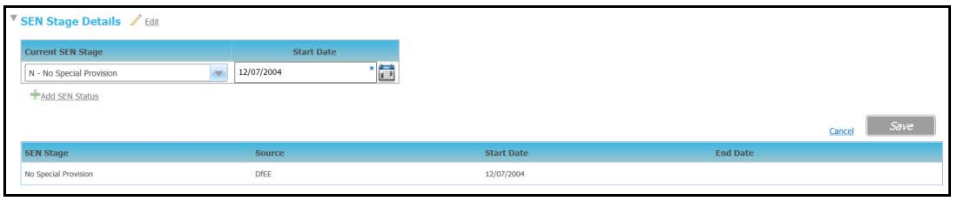
1. Click the **Edit** button to display the panel in edit mode.



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.

You can edit the **SEN Stage Details** as follows:

1. Click the **Edit** button to display the panel in edit mode.



2. To update the **Current SEN Stage**:
   a. Select a **Current SEN Stage** from the drop-down.
   b. Select a **Start Date**.
   c. Click the **Save** button.

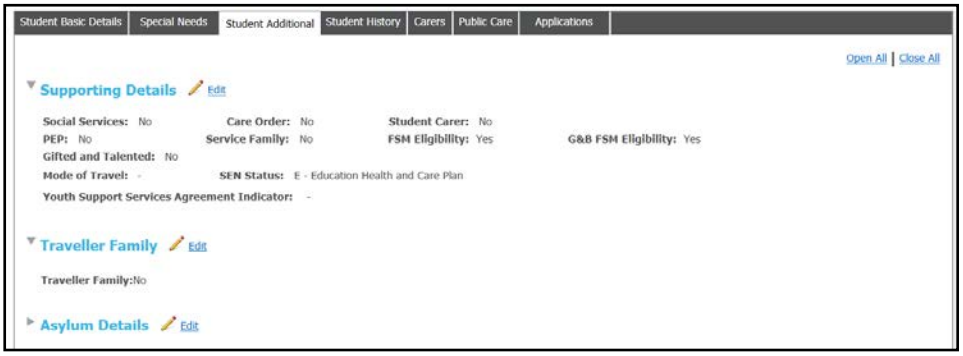
   Alternatively, to add a new **SEN Stage**:
   a. Click the **Add SEN Status** button.

b. Select a **Start Date**.

c. Click the **Save** button.

Editing Student Additional Details

The **Student Additional** tab page consists of **Supporting Details**, **Traveller Family** and **Asylum Details**.

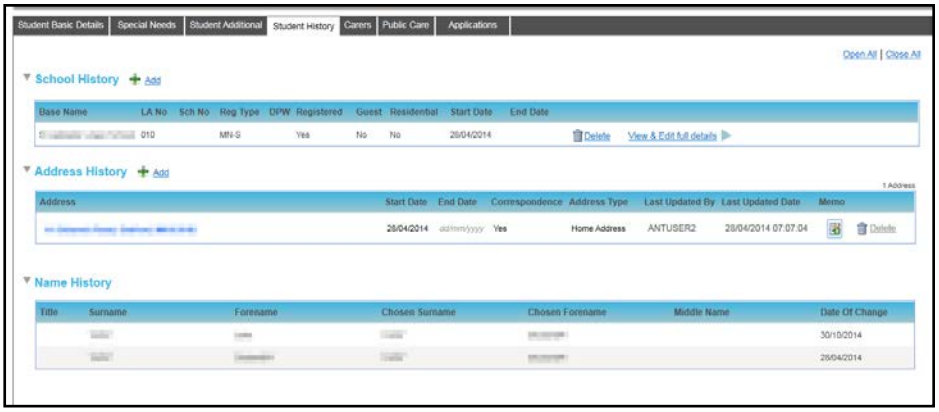


To edit the details on one of the panels:

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**.



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;

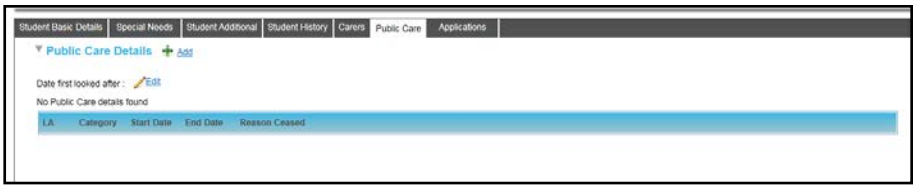
- Click the **Add** button to add a new address history record.
- Click the **Delete** button to delete an address history record.

Editing Carers

The **Carers** tab page enables you to edit **Carer Details** for the student.

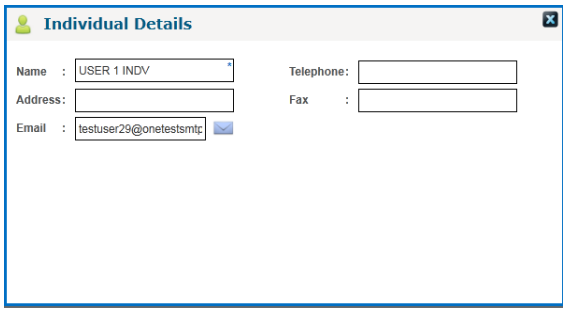
Editing Public Care Details

The **Public Care Details** tab page enables you to edit **Public Care Details** for the student.



Editing Applicant Details (Individual)

If the applicant is an individual, clicking the **View Applicant Details** button displays the **Individual Details** window.



The individual details can be edited as follows:

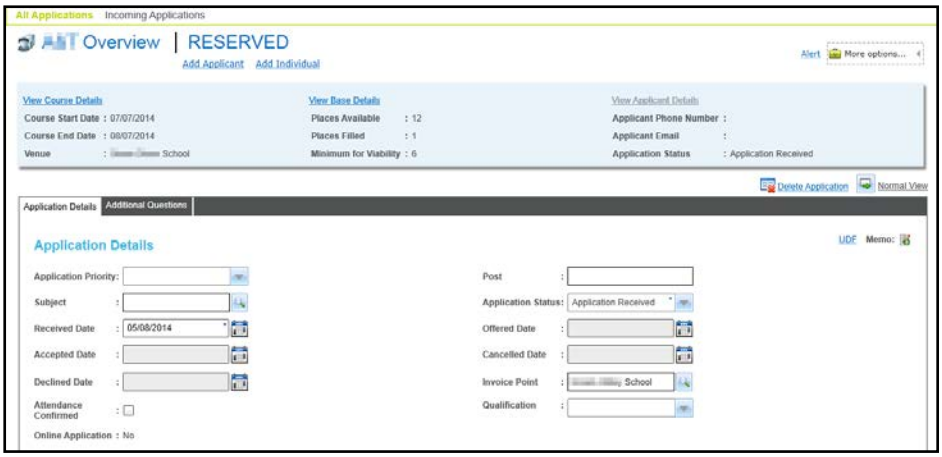
1. Enter new details
2. Click the **Save** button.

Adding an Applicant to a Reservation

Places can be reserved for a base and a new application can be added to this reservation.

1. Open the applications reserved for a base.

   For more information, see Viewing Applications Reserved for a Base *on page 112.*



2. Click the **Add Applicant** button to add a person using **Person Search** or click the **Add Individual** button to add an individual.

   For more information, see Selecting an Applicant *on page 135.*

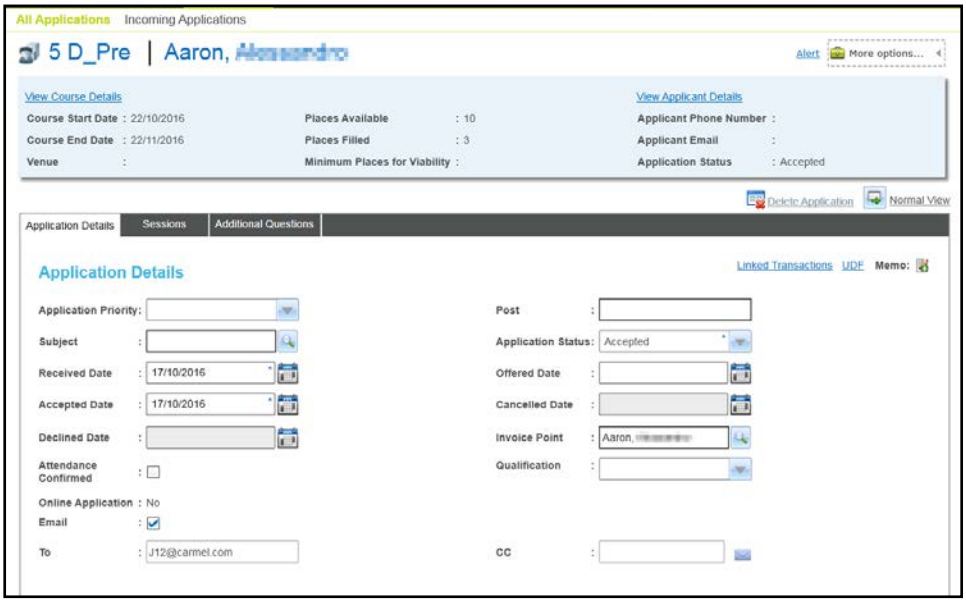
Creating Transactions Linked to the Application

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.*

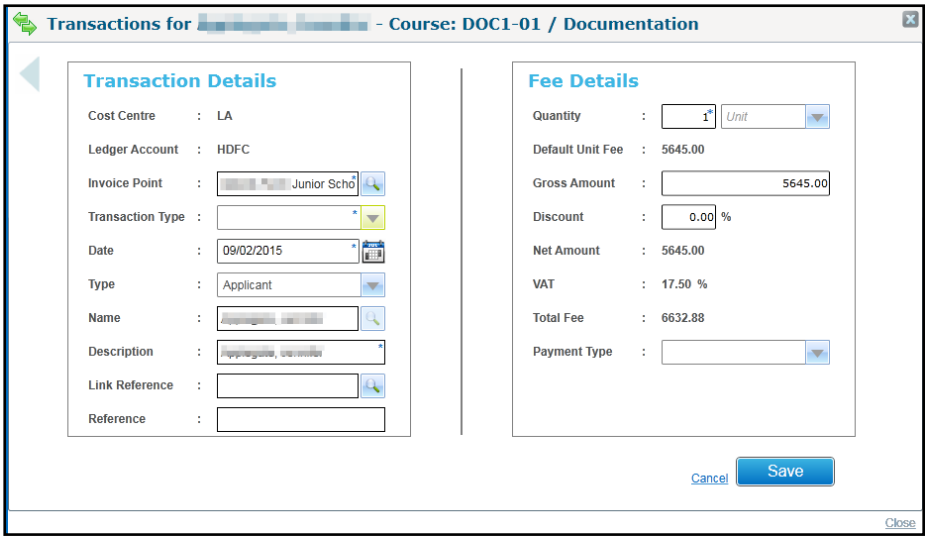
1. Open the required application.

   For more information, see Viewing Applications *on page 111*.



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

3. Click the **Add New Transaction** link to display the **Transactions Details**.

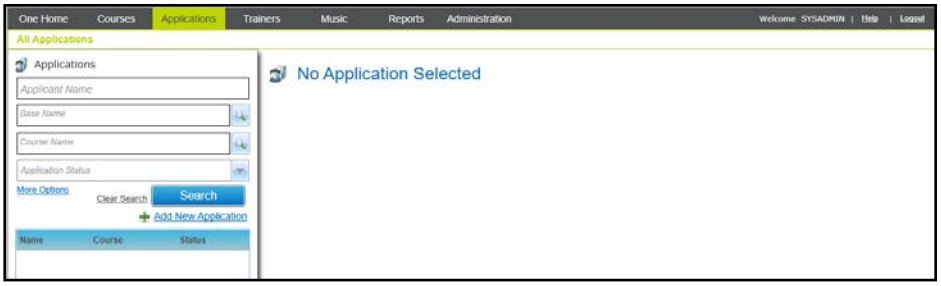


4. Enter the required details and click the **Save** button.

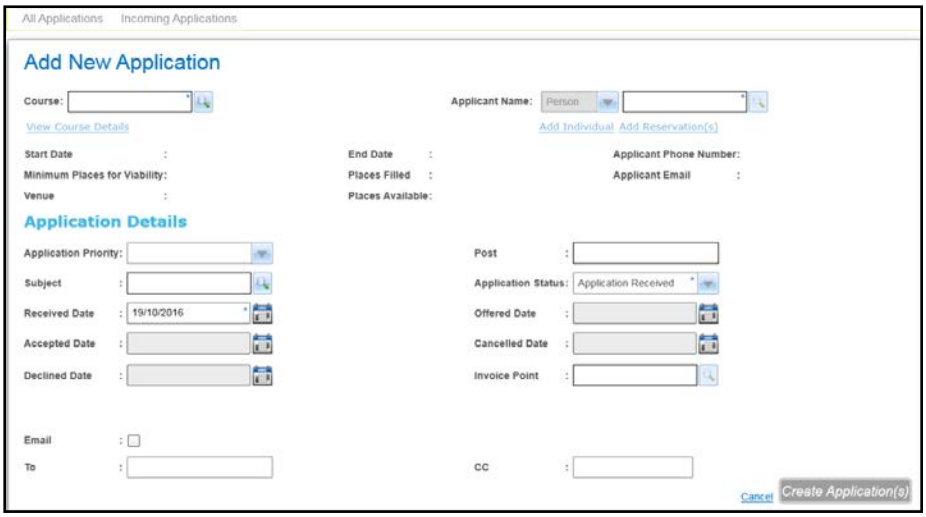
Adding an Application

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 134*.

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.



4. Click the **Course** browse button to display the **Select Course** window.

   For more information, see Selecting a Course *on page 114*.

> ***NOTE:*** *For non-music courses, the* ***Applicant Name*** *drop-down displays* ***Person*** *and the* ***Add Individual*** *and* ***Add Reservation*** *buttons are enabled. If the applicant is a student, select* ***Student*** *from the drop-down list.*

5. Select an **Applicant Name**.

   For more information on selecting a student, see Selecting an Applicant (Student) *on page 134*.

   For more information on selecting a person or individual, see Selecting an Applicant *on page 135*.

6. Enter **Application Details**. See Entering Application Details *on page 132*.
7. Click the **Create Application** 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 88.*

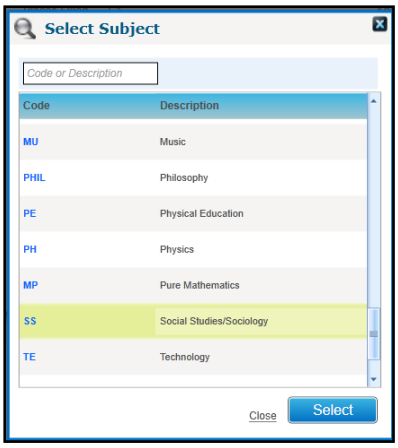
Entering Application Details

Application Details can be entered as follows:

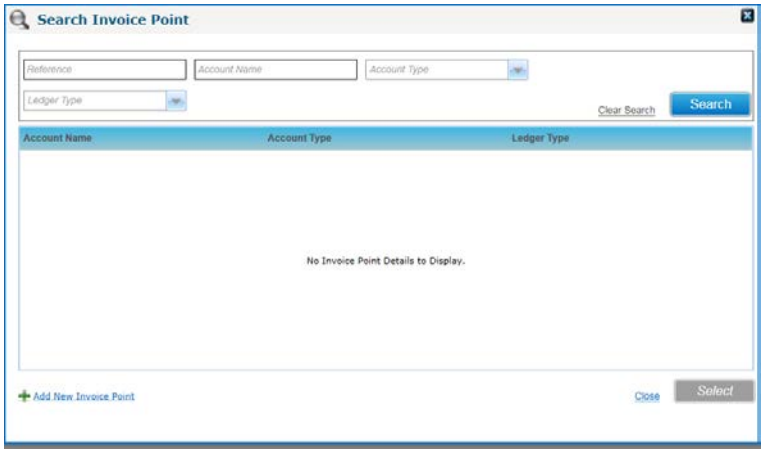
1. Select an **Application Priority** from the drop-down list.

> ***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 **Subject** browse button to display the **Select Subject** dialog.



4. Select the required subject 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.

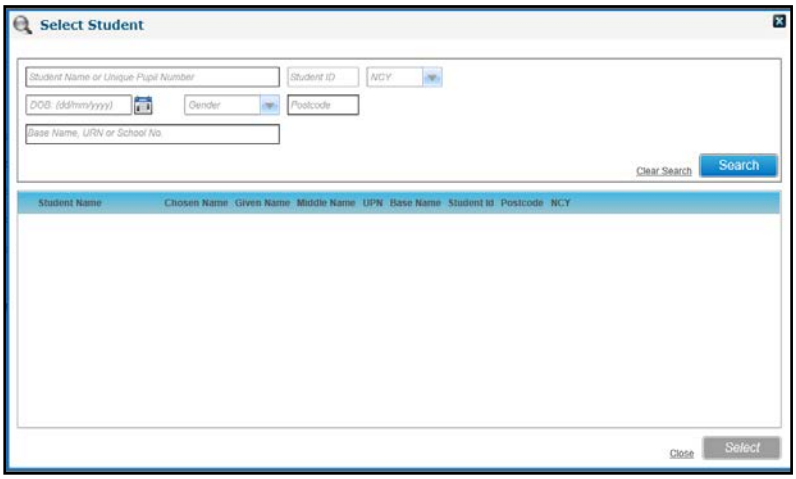
   Click the **Add Invoice Point** button to display the **Add New Invoice Point** screen. For more information, see Adding an Invoice Point *on page 41*.
9. **Select the required Invoice Point** and click the **Select** button.
10. If required, select the **Email** check box and enter a **To** email address and a **CC** email address. These email addresses can then be used to send course information.

More information:
Selecting an Applicant *on page 135.*
Selecting an Applicant (Student) on page *134.*
Adding a New Student on page *135.*
Reserving Places on a Course *on page 136.*
Creating Transactions Linked to the Application *on page 130*
Scheduling Email Options on page *59*.

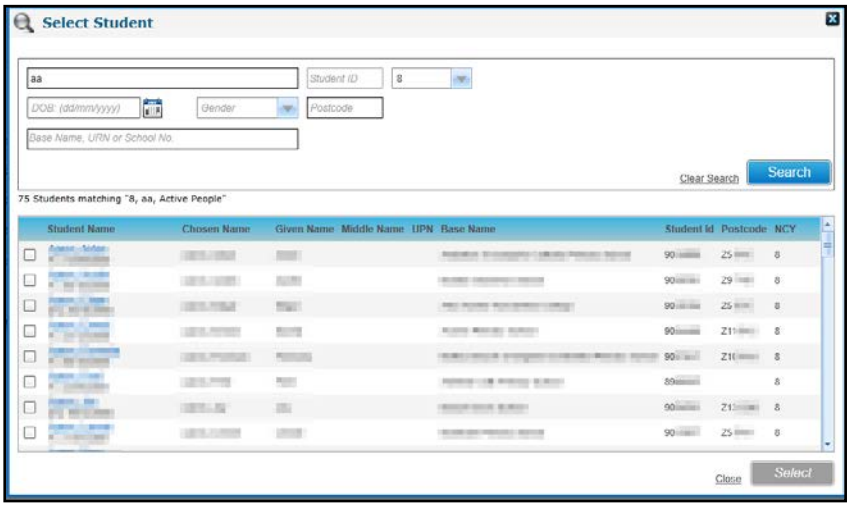
Selecting an Applicant (Student)

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.
2. Click the browse button to display the **Select Student** dialog.

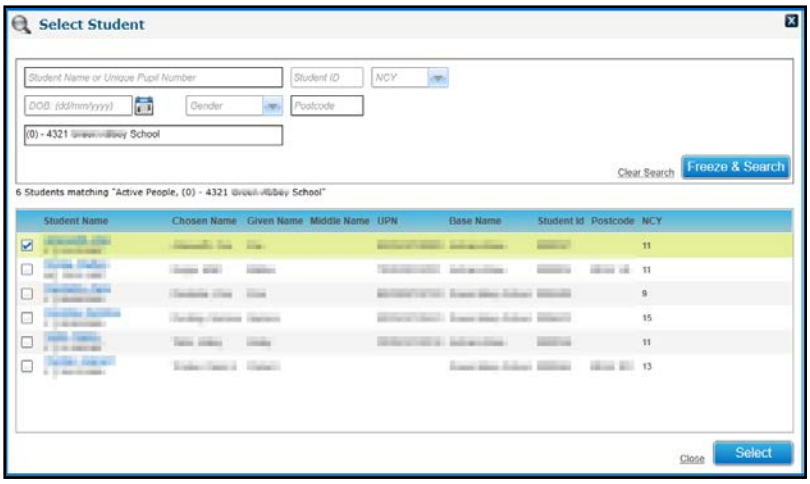


3. Enter your search criteria.
4. Click the **Search** button to display a list of matching students.



5. 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.*



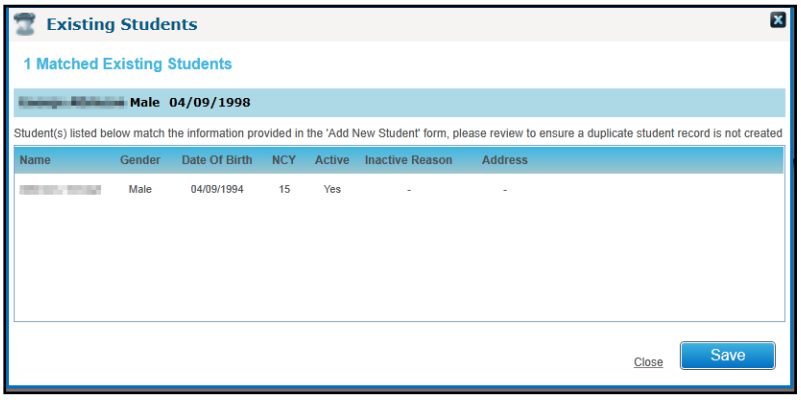
6. Click the **Select** button.

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.



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.

The applicant can also be added as a new individual.

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 *37.*

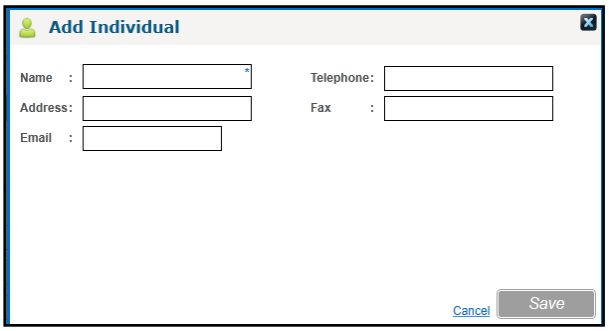
> ***NOTE:*** *If the applicant is an employee associated with only one current or future service record and the base is an existing invoice point, that base is assigned as the invoice point for the employee. If the base is not an existing invoice point, a confirmation message is displayed and, if confirmed, 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.*

Adding a New Individual

It is possible to record a named application without the applicant being recorded on the One database (either as a Student or Person). If you want to enter the applicant's details without matching them to a One person record and have no need to track the training history for the applicant, you can record the applicant as an **Individual**. An **Individual** is a temporary record with minimal details recorded.

Such individual applicant's personal details for courses that ended before a specified date can be deleted in bulk. For more information, see Bulk Deletion of Individuals *on page 27*.

1. Click the **Add Individual** button to add a new individual for this application.

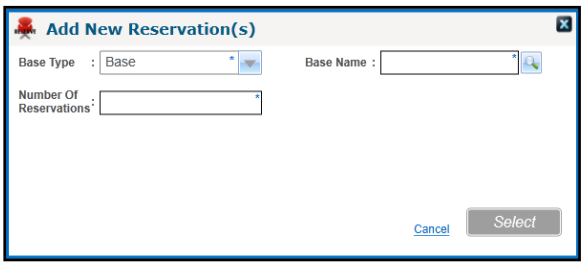


2. Enter the individual's **Name**.
3. If required, enter the **Address** and contact details as free text.
4. Click the **Save** button.

Reserving Places on a Course

Places can be reserved for a base.

1. Click the **Add Reservation (s)** button to display the **Add New Reservation** window.



2. Select a **Base Type** from the drop-down list.
3. Click the **Base Name** browse button to display the **Base Search** and select a base. For more information, see Selecting a Base *on page 113.*
4. Enter the **Number of Reservations** required.

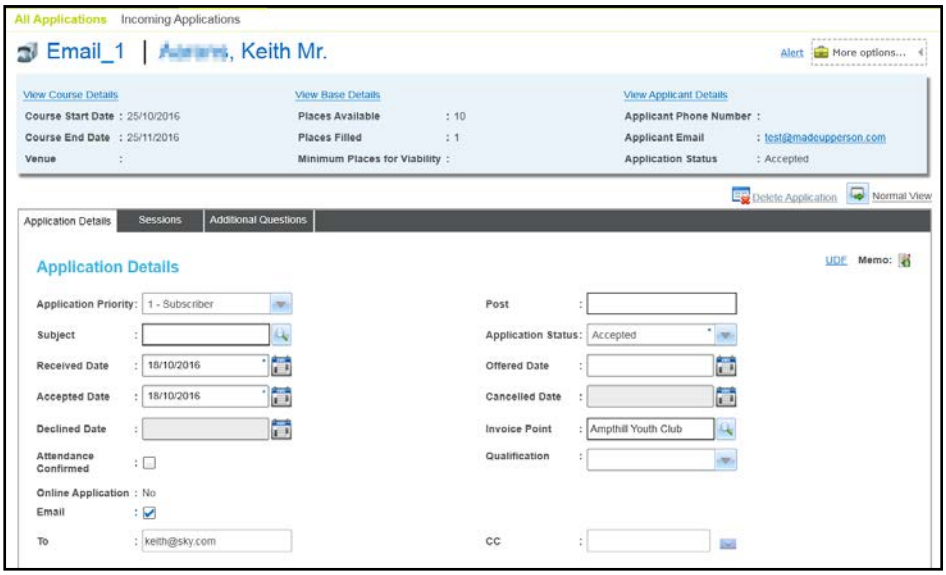
5. Click the **Select** button.

Deleting an Application

An application can only be deleted if it has not been accepted, i.e. **Application Status** is not either **Accepted** or **Invoiced**.

1. Open the required application.

   For more information, see Viewing Applications *on page 111*.



2. Click the **Delete Application** button to display a confirmation message.
3. Click the **Yes** button.

Incoming Applications

The **Incoming Applications** tab is used to view and process training course applications received via the Citizen or Provider portal.

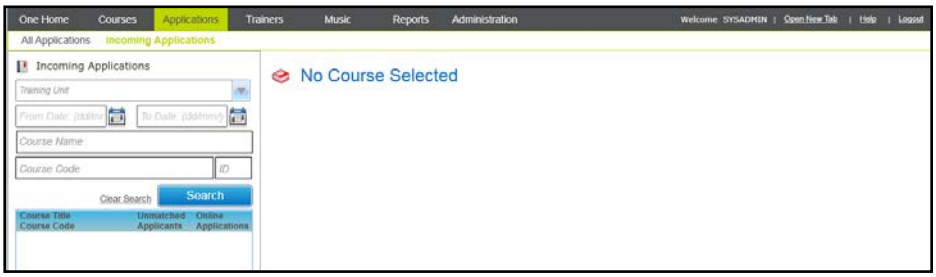
Such applications are placed in a temporary holding table and processed in two stages:

1. For named applications, the applicant is either matched to a One person or added as an individual.
2. The online application itself is processed as follows:
   - For Citizen portal applications, One checks each application to see if the applicant has already been processed for a Training Manager application before and has already been matched to a One Person. If so, there is no need to manually match the applicant.
   - For Provider portal applications, since the applicant details are entered as free text and not linked with a specific user account, each named applicant needs to be matched to a One Person or added as an Individual before the online application can be processed.

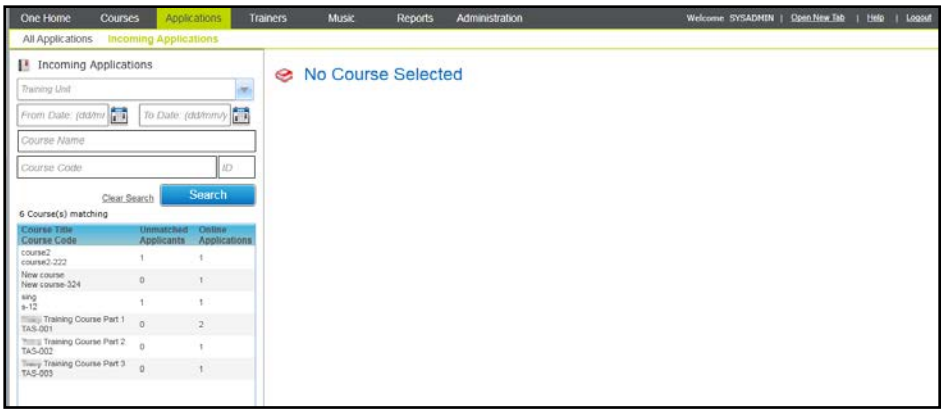
*NOTES: If the **Automatically add unmatched applicants as Individuals(do not match to One person)** check box is selected for the respective training unit via **Administration | Training Unit | Online Defaults**, the unprocessed applicant is automatically added as an Individual and not placed in the unmatched applicant area.*

*If the **Automatically import online applications with Application Received status** check box is selected for the respective training unit via **Administration | Training Unit | Online Defaults**, One automatically imports any application whose applicant is existing or processed (matched) and moves the application into the respective courses area with a status of **Application Received**.*

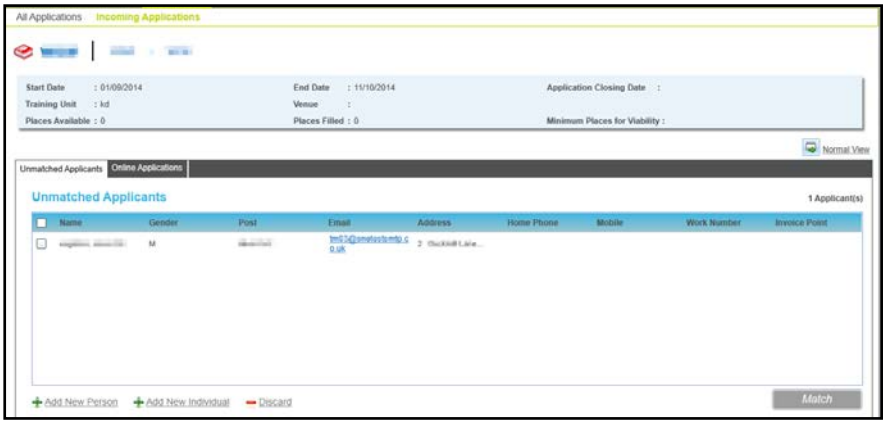
Viewing Incoming Applications



1. Select the **Applications** area.
2. Ensure the **Incoming Applications** tab is selected.
3. If required, enter your search criteria.
4. Click the **Search** button to display a list of courses for which there are online applications that have not been processed.



5. Select a course in the list to display the **Unmatched Applicants**.



Matching an Unmatched Applicant

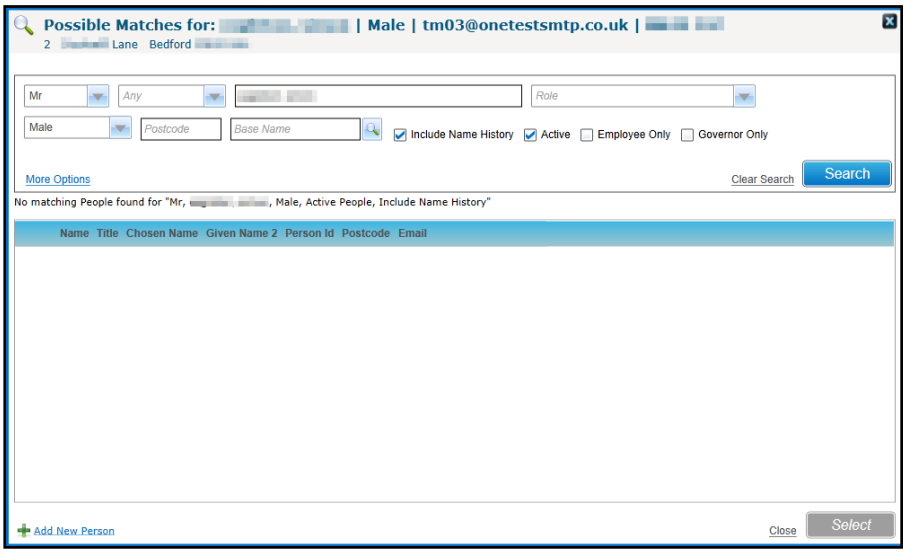
Before online applications can be processed, the applicant must be matched to an existing person on the One database, added as a new person or added as a new individual. The **Unmatched Applicants** tab page displays details of incoming unmatched applications and enables you to search the One database to find a match.

1. Open the list of unmatched applicants.

   For more information, see Viewing Incoming Applications *on page 138*.

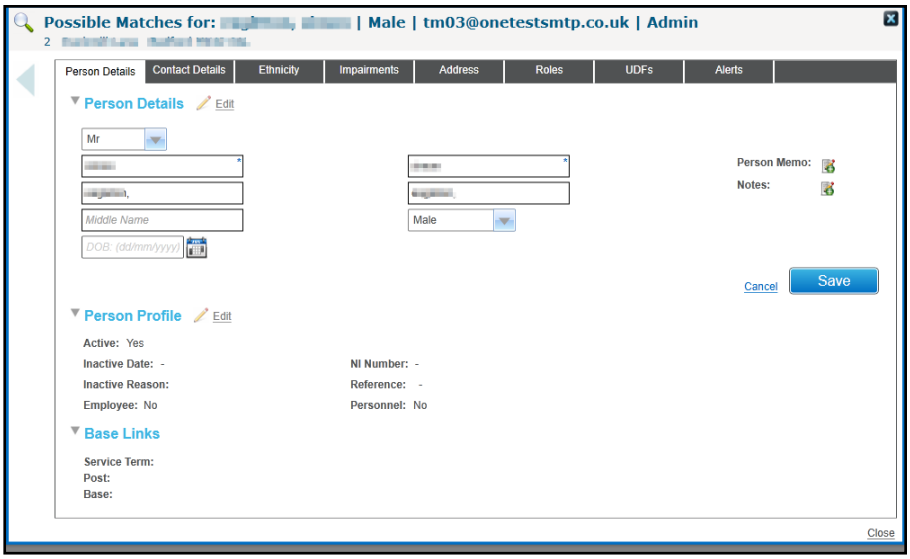
2. Select one applicant in the list.

3. Click the **Match** button to display the **Possible Matches** dialog.



4. If possible matches have been found, select a person in the list and click the **Select** button.
5. Alternatively, click the **Add New Person** button to display the **Person Details** for the unmatched person.

> ***NOTE:*** *If a match is not found initially based on **Title**, **Name** and **Gender**, amend the search criteria, e.g. the person might be recorded with a different title or a similar name. You can also search using the email address via the **More Options** link.*



6. To save the new person details, click the **Save** button.

> ***NOTE:*** *The unmatched person can be added an as individual by clicking the **Add New Individual** button on the **Unmatched Applicants** tab.*

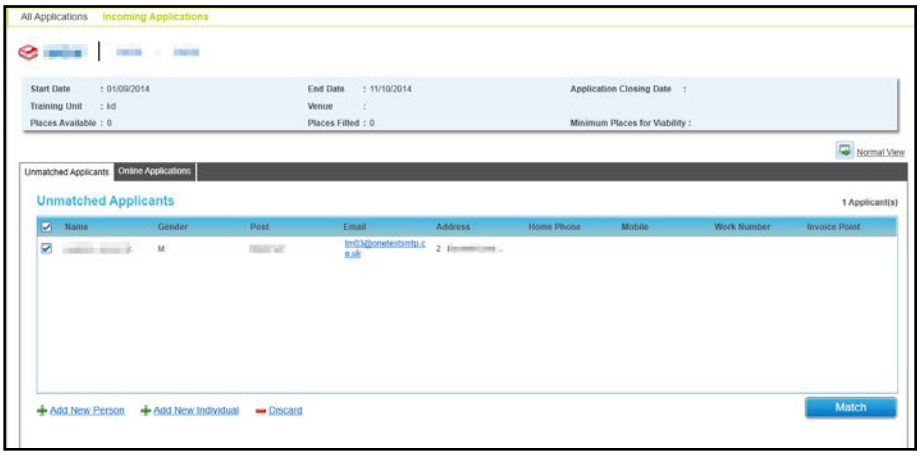
Discarding an Unmatched Application

Discarding an unmatched application removes the application from Training Manager v4 (Back Office) and marks the application as Declined.

1. Open the list of unmatched applications.

   For more information, see Viewing Incoming Applications *on page 138*.

2. Select an applicant in the list.



3. Click the **Discard** button to display a confirmation message.
4. Click the **Yes** button to discard the application.

Processing Online Applications

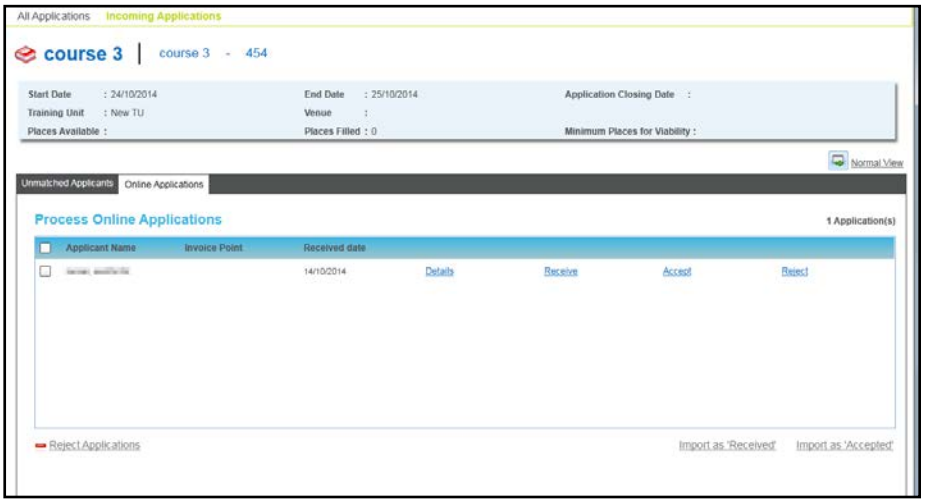
When the online applicant has been matched to an existing person or added, the application can be processed.

Viewing the Details of an Online Application

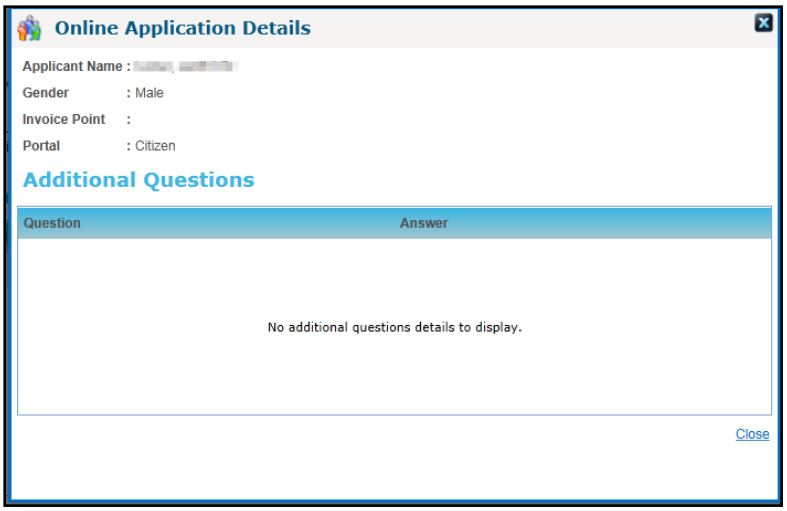
1. View the online application.

   For more information, see Viewing Incoming Applications *on page 138*.

2. Select the **Online Applications** tab.



3. Click the **Details** button to view the **Online Application Details**.



Importing an Application as Received

One or more applications can be imported and placed in the **Courses** area with an application status of **Received**.

1. View the online application.

   For more information, see Viewing Incoming Applications *on page 138*.

2. Select the **Online Applications** tab.
3. Click the **Receive** button for an individual application or select one or more applications and click the **Import as 'Received'** button.

Importing an Application as Accepted

One or more applications can be imported and placed in the **Courses** area with an application status of **Accepted**. After importing an application as accepted, you can create a pre-populated sales order transaction linked to the application if the following conditions apply:

- 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.

1. View the online application.

   For more information, see Viewing Incoming Applications *on page 138*.

2. Select the **Online Applications** tab.
3. Click the **Accept** button for an individual application or select one or more applications and click the **Import as 'Accepted'** button.

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

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

   a. 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.

   b. Click the **Save** button.

Rejecting an Application

One or more applications can be rejected. Rejected applications are removed from the Incoming Applications page and the status is updated to Declined.

1. View the online application.

   For more information, see Viewing Incoming Applications *on page 138*.

2. Select the **Online Applications** tab.
3. Click the **Reject** button for an individual application or select one or more applications and click the **Reject Applications** button.

   A confirmation message is displayed.

05 | Managing Trainers

Introduction to Managing Trainers

The **Trainers** area maintains details of Training Manager course leaders.

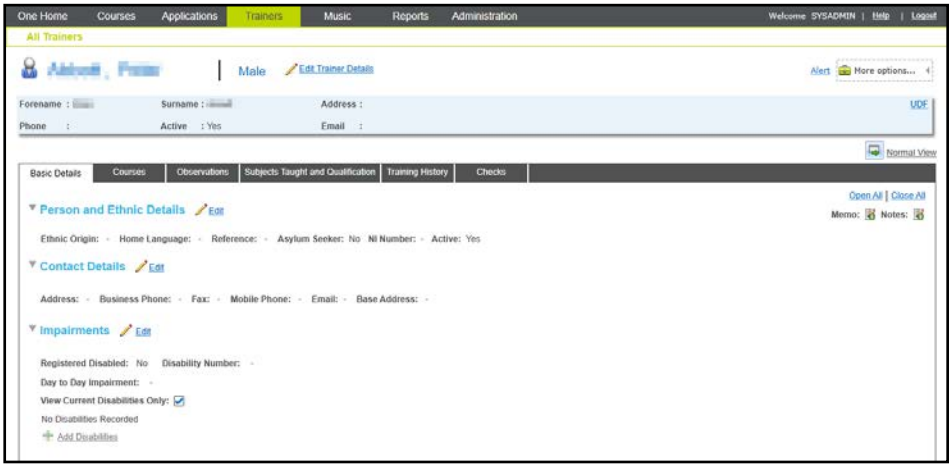
The **Trainers** search panel is displayed on the **All Trainers** page when you select the **Trainers** area. It is used to search for a course leader to view or update the details.

Viewing Training Manager Course Leaders

1. Select the **Trainers** area to display the **All Trainers** page.

2. If required, enter a full or partial **Person Name**.
3. Ensure that **Training Manager Leaders** is selected from the **Role** drop-down.
4. Click the **Search** button to display a list of matching **Training Manager Leaders**.

5. Select the required **Name** in the list to display the trainer details.



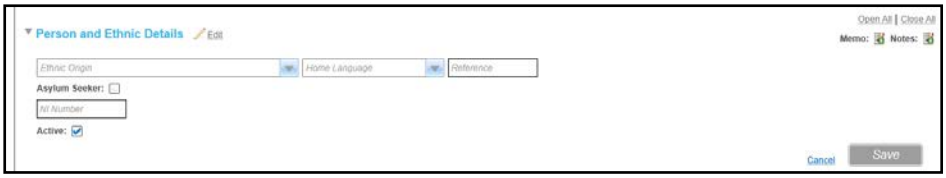
Editing Trainer Basic Details

Search for the required trainer to view the person basic details.

For more information, see Viewing Training Manager Course Leaders *on page 143.*

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.

2. Edit the details as required.
3. If required, add a disability:
   a. Click the **Add Disabilities** button to display additional fields:

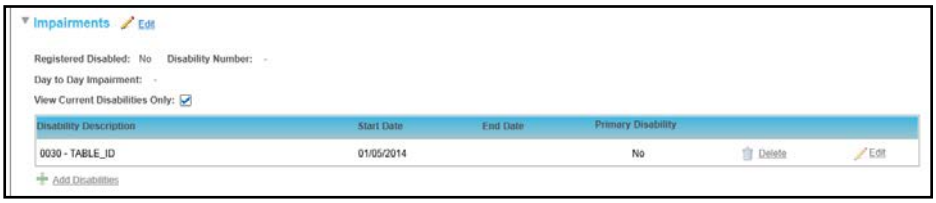
b. Select a **Disability Description** from the drop-down list (*Lookup table ID: 0030*).

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.



Managing the Trainer's Courses

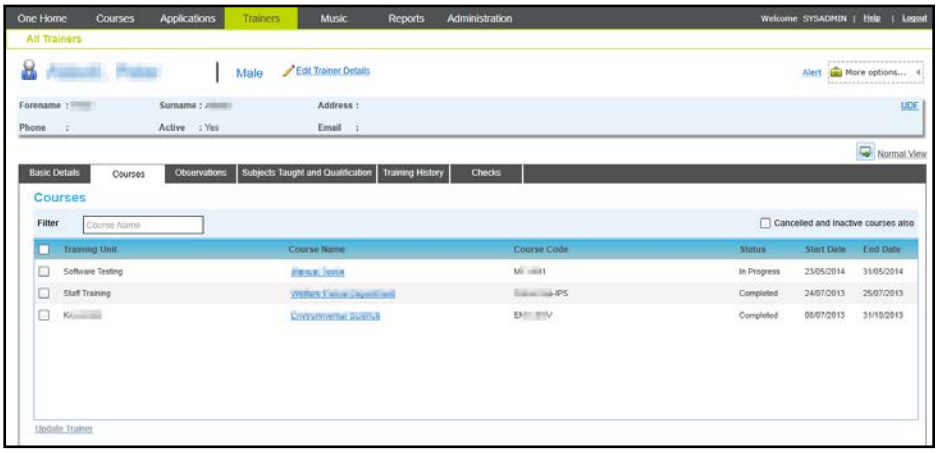
Courses conducted by this trainer can be viewed. If a trainer is no longer available, the selected course can be assigned to another trainer.

Viewing the Trainer's Courses

Search for the required course leader to view the details.

For more information, see Viewing Training Manager Course Leaders *on page 143.*

1. Select the **Courses** tab to display the courses conducted by this trainer.



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.

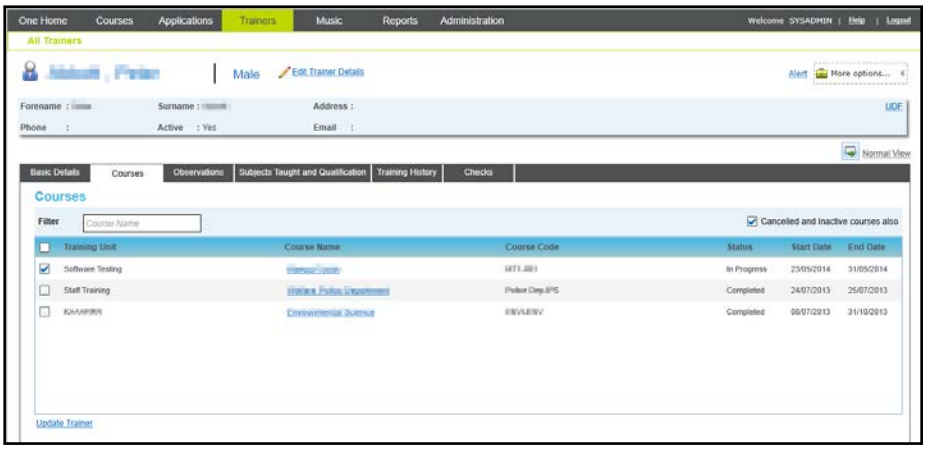
Assigning a Course to a Different Trainer

If the selected trainer is no longer conducting one of the listed courses, it can be assigned to a different trainer.

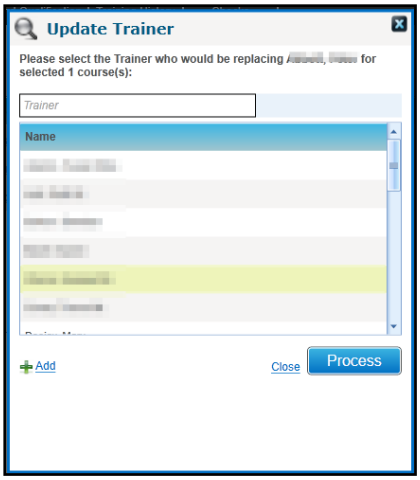
1. Open the list of courses for the current trainer.

   For more information, see Viewing Training Manager Course Leaders *on page 143.*

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 37*.

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

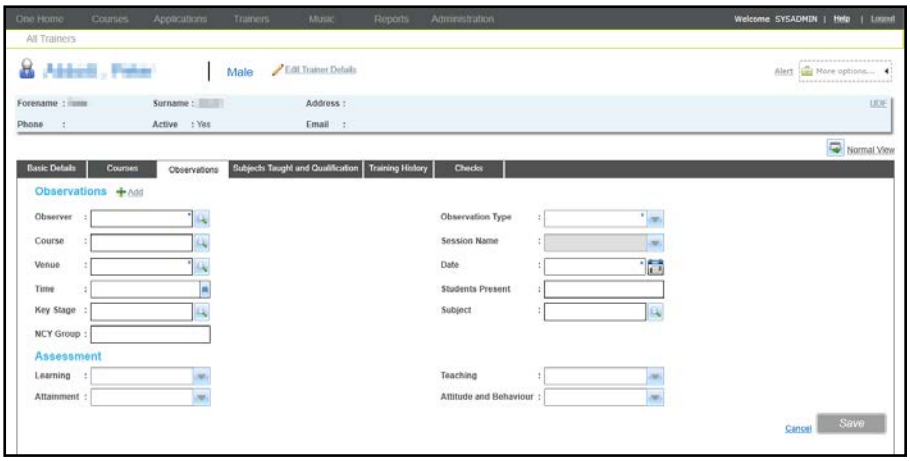
Observations can be recorded for the selected trainer. You can view the recorded observations and add new ones via the **Observations** tab.

Adding Observations

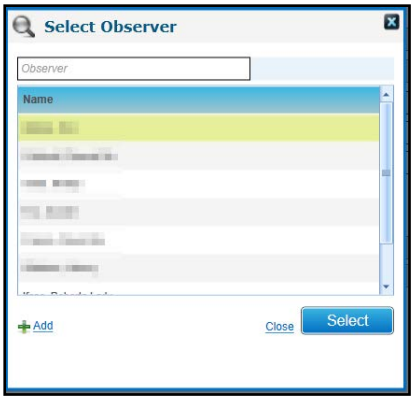
1. Display the list of observations for the trainer.

   For more information, see Viewing Training Manager Course Leaders *on page 143.*

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.

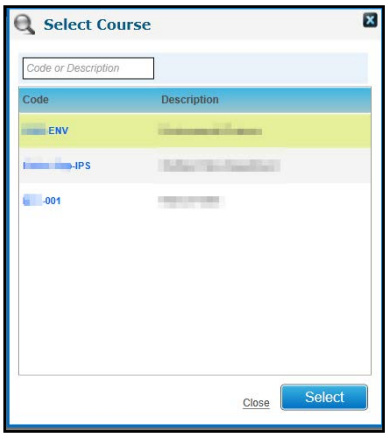


   a. Select an **Observer** from the list of people assigned the role of Observer. The list is maintained via **Administration | People Roles**.

   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.



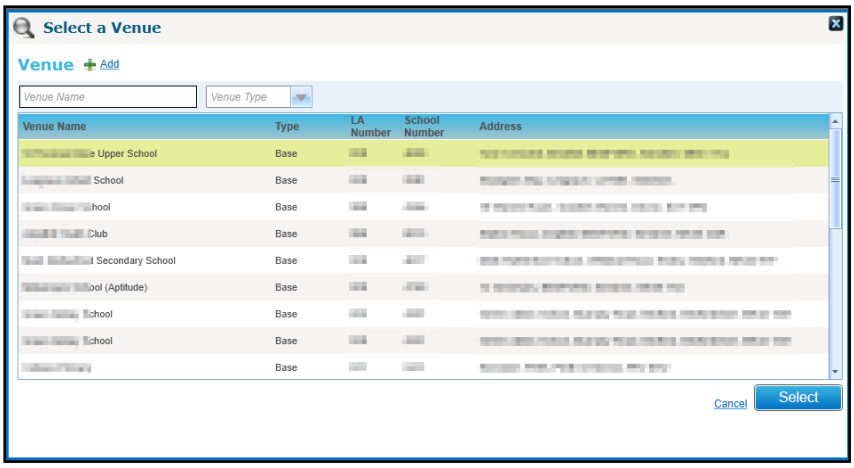
   a. Select the required course

   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:



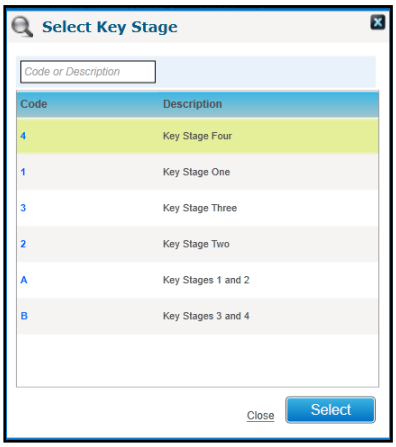
b. Select the required **Venue.**

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.

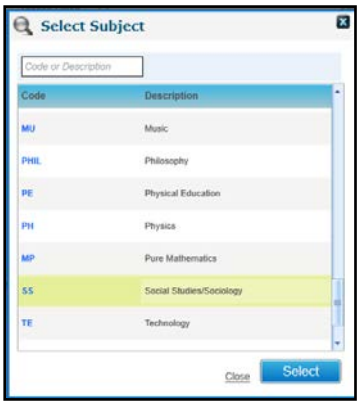


b. Select the required key stage **Code**.

c. Click the **Select** button.

9. If required, select a **Subject:**

a. Click the **Subject** browse button to display the **Select Subject** window.



b. Select the required subject.

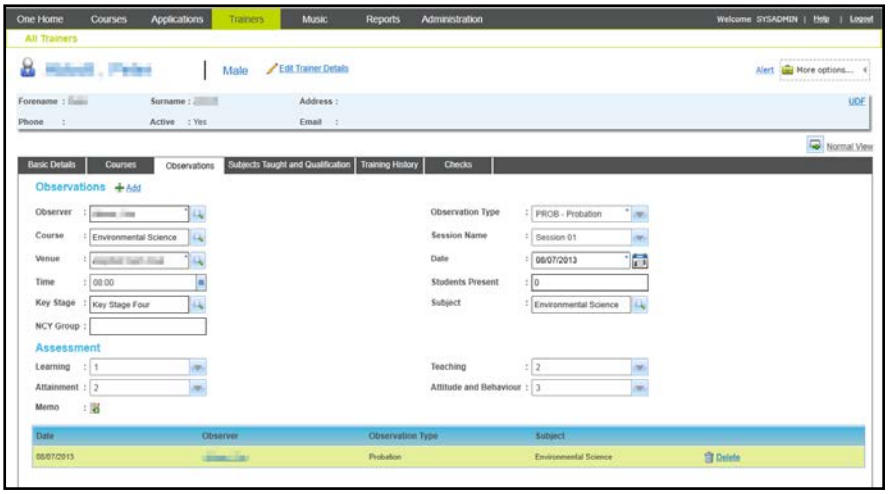
c. Click the **Select** button.

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 course leader to view the details.

   For more information, see Viewing Training Manager Course Leaders *on page 143.*
2. Select the **Observations** tab to display observations recorded for this trainer.



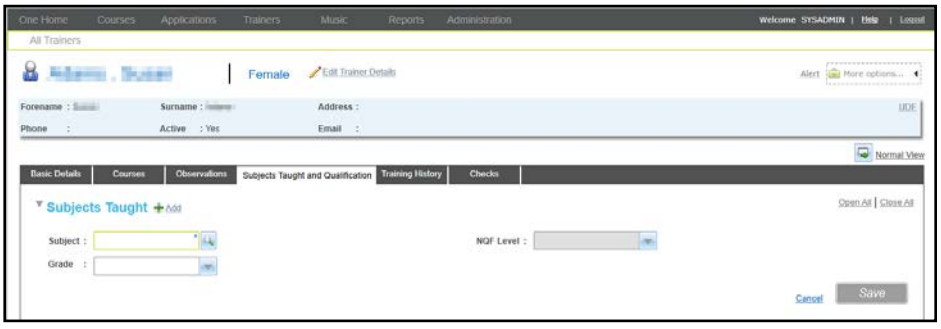
Managing Subjects Taught and Trainer Qualifications

The subjects taught by the selected trainer and qualifications held can be viewed and updated via the **Subjects Taught and Qualification** tab.

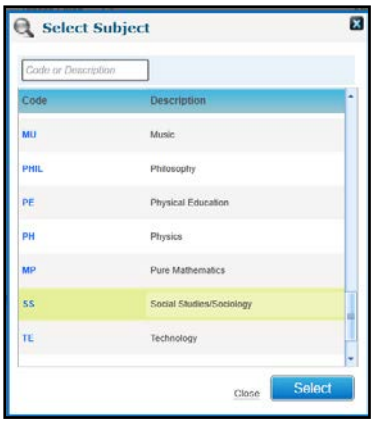
Adding New Subjects Taught

1. Search for the required course leader to view the details.

   For more information, see Viewing Training Manager Course Leaders *on page 143.*
2. Select the **Subjects Taught and Qualification** tab.
3. Click the **Add** button to display the **Subjects Taught** panel in add mode.



4. Click the **Subject** browse button to select a subject.



5. Select the required subject and click the **Select** button.
6. If required, select a **Grade** from the drop-down list.
7. Click the **Save** button.

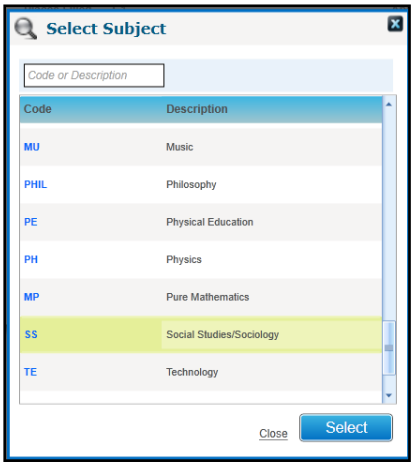
Editing Subjects Taught

1. Search for the required course leader to view the details.

   For more information, see Viewing Training Manager Course Leaders *on page 143.*
2. Select the **Subjects Taught and Qualification** tab.

3. On the **Subjects Taught** panel, click the **Edit** button.

4. If required, click the browse button to display the **Select Subject** window.



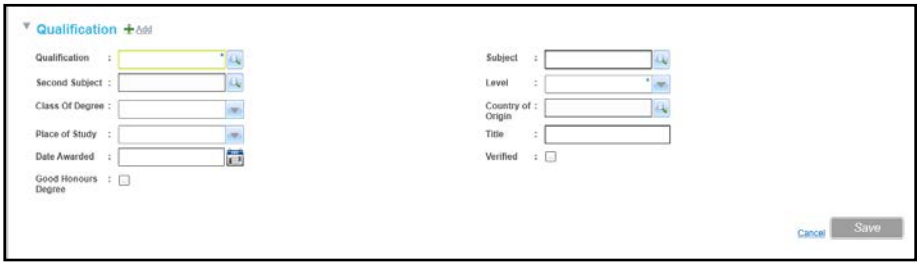
5. Select the required subject and click the **Select** button.
6. If required, select a **Grade**.

7. Click the **Save** button.

Adding a Qualification for a Trainer

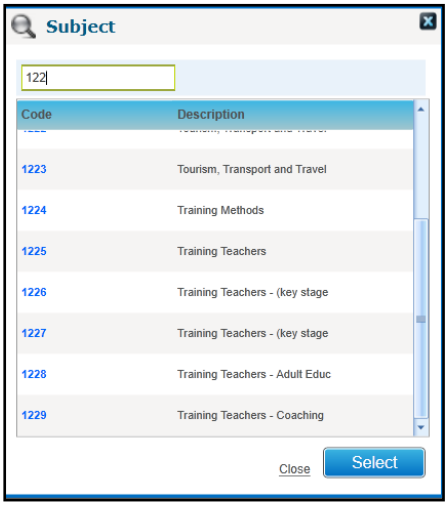
1. Search for the required course leader to view the details.

   For more information, see Viewing Training Manager Course Leaders *on page 143.*
2. Select the **Subjects Taught and Qualification** tab.
3. On the **Qualification** panel, click the **Add** button.



4. Select the **Qualification** browse button to display the **Qualification** window.

   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.



   a. Filter the list based on **Code** or **Description**.
   b. Select the required **Subject**.

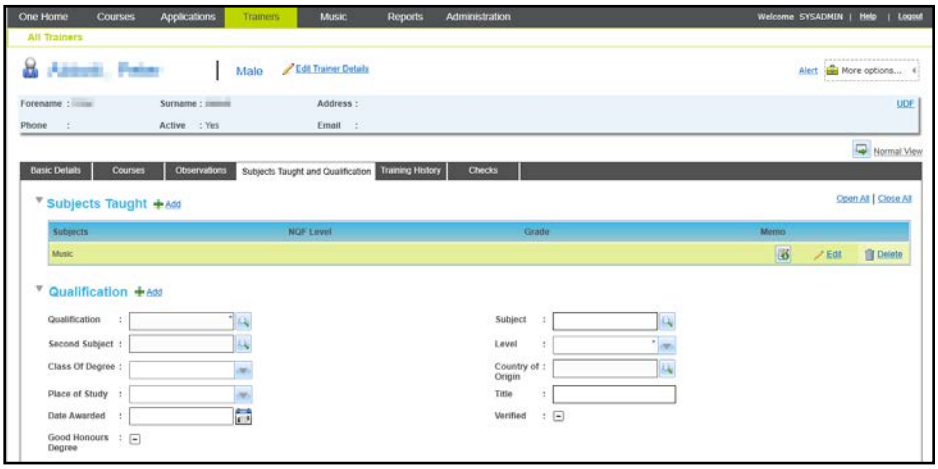
c. Click the **Select** button.

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 Subjects Taught and Qualifications Held

1. Search for the required course leader to view the details.

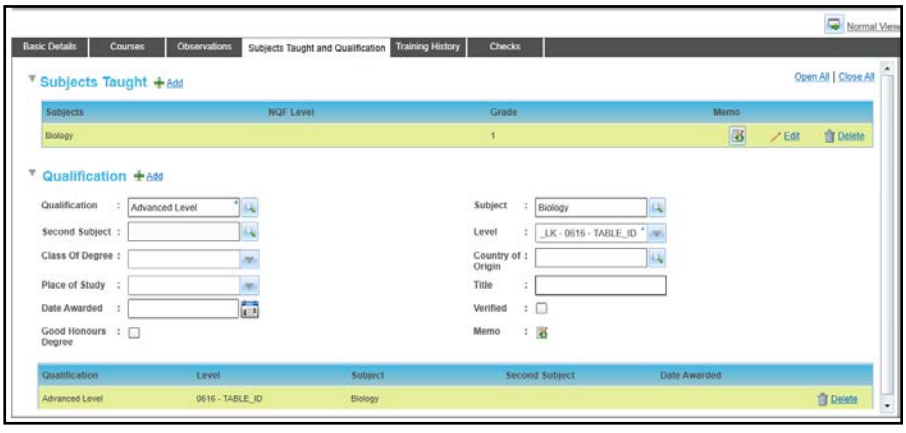
   For more information, see Viewing Training Manager Course Leaders *on page 143.*
2. Select the **Subjects Taught and Qualification** tab.



Deleting a Subject Taught or a Qualification Held

1. Search for the required course leader to view the details.

   For more information, see Viewing Training Manager Course Leaders *on page 143.*
2. Select the **Subjects Taught and Qualification** tab.



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

Managing Training History

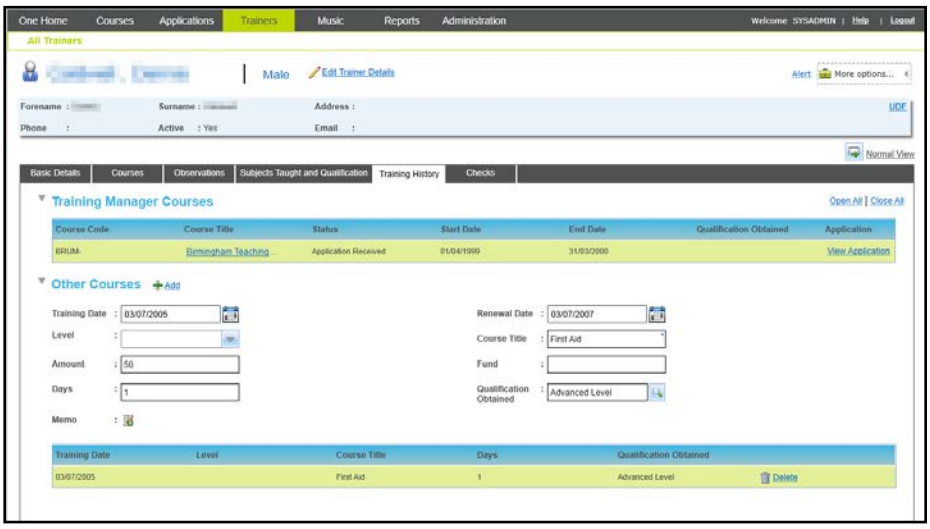
The training history for this course leader can be viewed and updated via the **Training History** tab.

Viewing the Training History

1. Search for the required course leader to view the details.

   For more information, see Viewing Training Manager Course Leaders *on page 143.*

2. Select the **Training History** tab to display the **Training Manager Courses** and **Other Courses** recorded for this trainer.



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

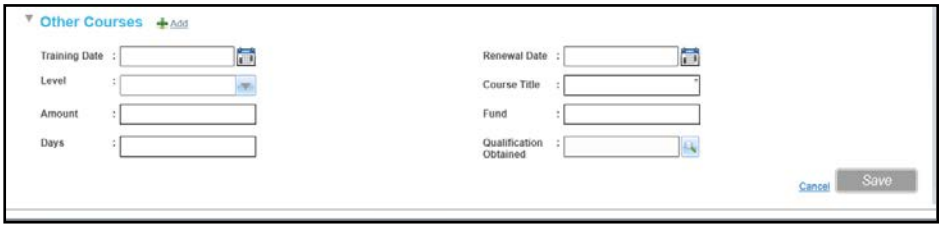
Details of a training course can be added to the training history for the course leader.

> ***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 153.*

2. Click the **Add** button to display the **Other Courses** panel in add mode.



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 153.*
2. Click the **Delete** button to display a confirmation message.
3. Click the **Yes** button to delete the course from the training history.

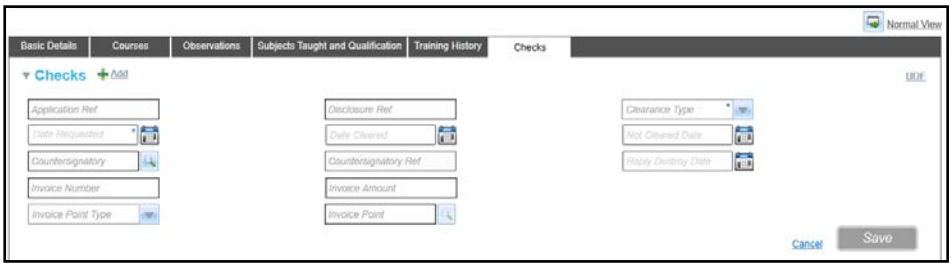
Managing Trainer Checks

Checks carried out for this trainer can be viewed and updated and new checks can be added via the **Checks** tab.

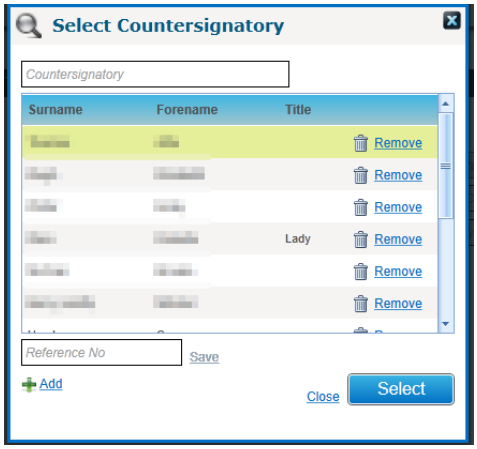
Adding Trainer Checks

1. Display the list of current checks for the trainer.

   For more information, see Viewing Trainer Checks *on page 156.*
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.

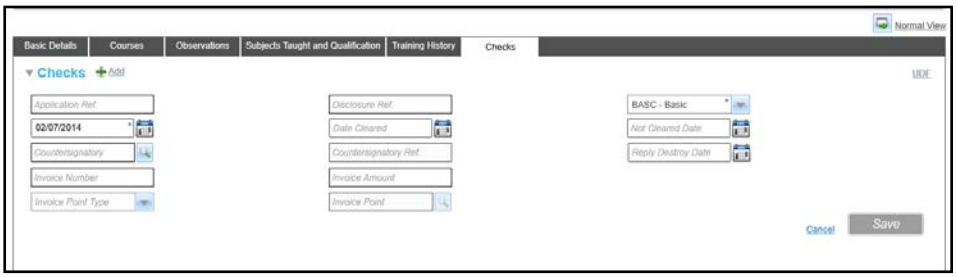
9. Click the **Save** button.

Editing Trainer Checks

1. Open the list of current checks for the trainer.

   For more information, see Viewing Trainer Checks *on page 156.*

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:

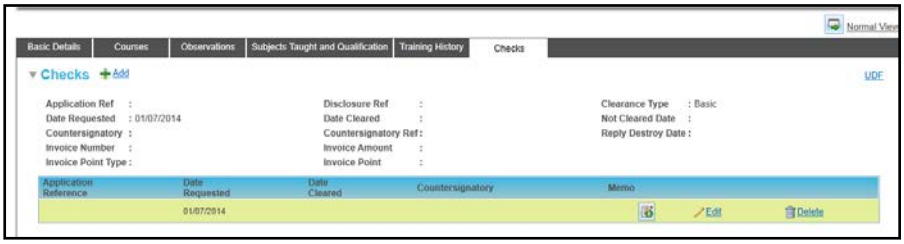
- **Invoice Point Type** is **A-Applicant:** the **Invoice Point** is automatically completed with the **Applicant Name**.
- **Invoice Point Type** is not **A**: click the browse button to select the **Invoice Point** via the **Person Search** or **Base Search** dialog.

6. Click the **Save** button.

Viewing Trainer Checks

1. Search for the required course leader to view the details.

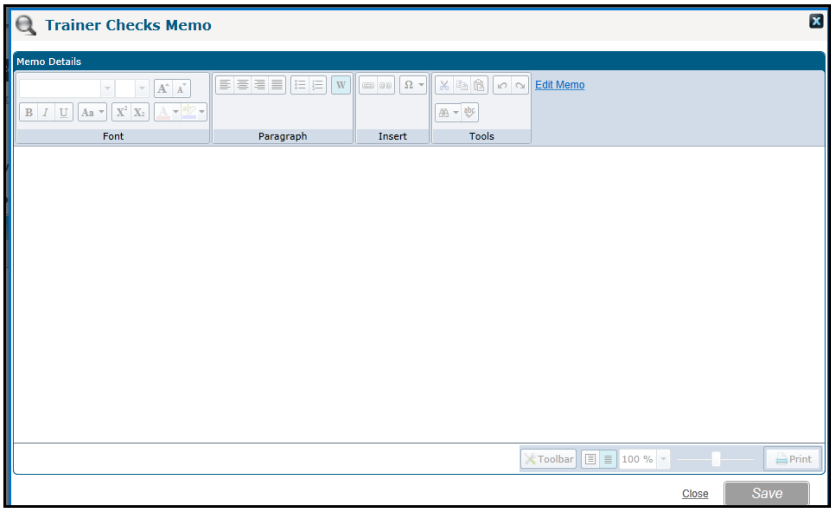
   For more information, see Viewing Training Manager Course Leaders *on page 143.*
2. Select the **Checks** tab to display the current checks for the trainer.



Recording a Trainer Checks Memo

1. Open the list of current checks for the trainer.

   For more information, see Viewing Trainer Checks *on page 156.*
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 156.*
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

Training Manager 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.

Managing reports in Training Manager 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 training manager courses can be viewed or updated via the **Students** area.

If the Local Authority has a licence for Music Tuition, and the user has permission to access the Music Training Unit, then the **Students** area is accessed via the **Music** menu.

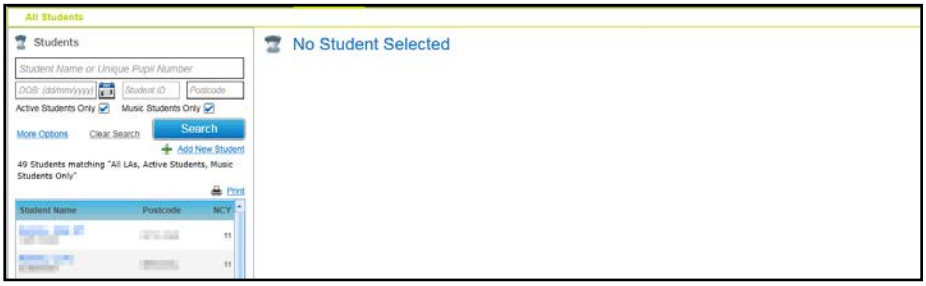
Maintaining Student Details

The **All Students** tab enables you to view the student details.

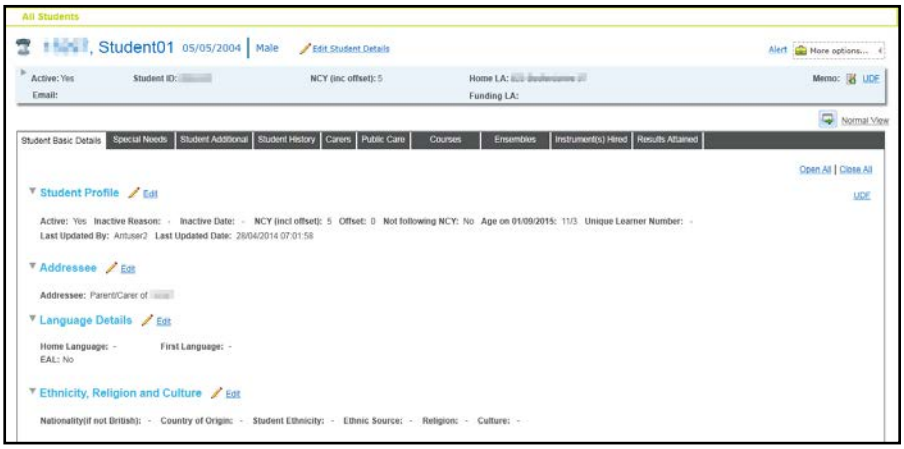
Viewing Student Details

You can search for and view the details of students that are associated with training manager courses. The search criteria available are the basic student identifiers, base details for the student and further student information.

1. Select the **Students** area.
2. Ensure the **All Students** tab is selected.



3. Enter your search criteria. A full or partial **Student Name** or **Unique Pupil Number** can be entered. 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.



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 Student Details *on page 159*.
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.

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