

Quick Start

Learner Information Suite 15.01



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Introduction

This Quick Start is for users of the Learner Information Suite (LIS) version 15.01. Using LIS version 15.01, providers can validate 2007/08 ILR data, calculate FE funding, calculate TtG Funding and calculate derived variables and run reports against their data. LIS 15.01 also exports valid ILR files. This document summarises the steps involved to achieve these tasks. It also shows where to look for more help in the existing guides.

Notes on Use:

Clicking on any of the blue hyperlinks on pages 1 to 3 of this document will take you to the further information section on page 4. The further information section has links to the relevant parts of the LSC website and page references for the full user guide.

This procedure should be used to:	Install LIS 15.01.
It applies to:	All

Step	Action
1	Download and unzip the installation files from www.lsc.gov.uk/providers/Data/Software/LIS/LIS15-01 .
2	Ensure you are logged into your machine with administrator access rights. You may need to contact your IT support to achieve this.
3	Run the setup.exe file and follow the on-screen instructions.
4	The LIS is installed.
5	If you are using a Microsoft Vista machine, you will need to run the LIS once, whilst logged in with administrator access rights, otherwise the LIS will not work when you revert back to normal access rights.

This procedure should be used to:	Import and validate an ILR file using LIS 15.01.
It applies to:	All ILR collection types (FE; WBL; ACL; ESF SR and UFI)

Step	Action
1	Use your own MIS to create an ILR data file in the correct format (as described in the ILR 2007/08 specification).
2	Run the LIS, Log in to LIS 15.01 and access the Batch Import screen .
3	Ensure that the latest version of the LAD has been downloaded and linked to LIS 15.01.
4	Select the correct Provider ; Collection Type and Collection (which must match your ILR data file).
5	Select the file to import and the operations required and start the batch import. The recommended options are 'Import ILR Data'; 'Validate Data' and the report 'Rule Violations / Rule Violations Summary'. Also available in LIS 15.01 Batch Import are the options to export the database directly to, to export reports as either a CSV, RTF, Word, Excel or an mdb document as well as the option to print. Export file paths can be chosen too.
6	If there are any import errors, a message appears and the import aborts. If there are any non-critical import errors the import will run but the imported data may not be complete. Look at the Rule Violations or Rule Violations Summary Report to see if there are any errors listed in the Import Errors section.

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7	Resolve any import errors (use the rule name and description as listed in the report and refer to the ILR specification . In some cases you may need to look at the ILR file itself). You will need to make the changes in your MIS and re-create the ILR data file. Repeat steps 4 to 6 until the file imports without import errors. Note: Although some import errors do not cause the import to abort, if these aren't resolved it could result in data being excluded from the imported ILR data, or the file may not import at all. This leads to incomplete data in the ILR export.
8	Look at the Summary Report Table at the end of the Rule Violations or Rule Violations Summary Report and see if the 'number of invalid' learners in the 'fully validated learners' box is zero.
9	If it is not, use the details in the Errors section of the report and look at the ILR data to locate the source of the error. The rule name indicates the fields to check. You may also wish to refer to the ILR specification , the validation rules spreadsheet and validation rules guidance document. Note: You may find it useful to run the Rule Violations report (from the Report Manager screen) to see a more detailed breakdown of where the errors occur. You can use filters with this report to focus on particular learners or learning aims or types of errors, such as FE funding or import errors.
10	Resolve the errors in your MIS and recreate the ILR file. Repeat steps 4 to 9 until the 'number of invalid' learners in the 'fully validated learners' box on the Rule Violations / Rule Violations Summary report is zero.

When your ILR file is valid and correct, calculate your [FE Funding](#), produce a [Learner Number with Funding](#), perform an [FE Reconciliation](#), or calculate your [TtG Funding](#), produce a [TtG Funding Summary Report](#) or a [TtG Occupancy Export Report](#) and use the [ILR Export](#) screen to prepare a file to send to the LSC.

These procedures should be used to:	Calculate FE funding, print a Learner Number with Funding report and reconcile FE data.
They apply to:	FE and UFI collection types.

FE Funding

Funding calculations are performed on those ILR records which pass the Funding Rule Subset of the validation rules. The LSC calculation is based on only those records which pass all validation rules.

Step	Action
1	When you import and validate an ILR file in Batch Import, tick the "Calculate FE Funding" operation.
or	If you have already imported and validated an ILR file, use the Calculate FE Funding screen and click the Calculate button.

The results of the calculations can be seen by using the Funding Viewer.

Learner Numbers with Funding Report

This report can be printed from Batch Import or from Report Manager. Both methods produce the same report.

FE Reconciliation

From two different ILR returns, the LIS identifies records for learners on the earlier return which are expected to be included on the later return. Where records are not in the later return, the missing record is listed. Select Reconciliation and the two files to be compared. Choose the output file and click on Reconcile.

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These procedures should be used to:	Calculate TtG funding, see various TtG reports.
They apply to:	WBL collection type.

Train to Gain Funding

TtG funding can be calculated from WBL ILR data files that contain TtG funded learners, where ILR field A10 = 60. The LIS performs TtG funding calculations on those ILR records which pass the Funding Rule subset of the validation rules. Once the ILR file has been transmitted to the LSC through the Online Data Collections System, the TtG funding calculation is only performed on those records that pass all validation rules.

Step	Action
1	When you import and validate an ILR file in Batch Import, tick the "Calculate TtG Funding" operation.
Or	If you have already imported and validated an ILR file, use the Calculate Funding Data screen and click the Calculate TtG button.

The results of the calculations can be seen by using the TtG Funding Viewer screen.

Train to Gain Funding Summary Report

This report summarises Train to Gain funding across Skills for Life and Full level 2 aim types within a single period. The default period for TtG funding is based upon the period in the file extension, for example a W03 return uses a default of period 3. A W13 return uses a default period of 12. The period can be changed by the user in the report filter when the report is run from the report manager screen. If this report is run from a batch import process the default period is used. Both methods produce the same report.

Train to Gain Occupancy Export Report

This export report – the Train to Gain Occupancy Export – shows details for all aims, including aim monitoring fields, TtG funding information and other data that are used to create the TtG Funding Summary report. It is available for WBL files, and details from all aims, regardless of A10, are included.

The export report can be produced in the standard LIS export formats (currently.mdb, .mdf and .csv). There is an option in the report manager to filter the report by local LSC, field L25.

New reports for Train to Gain in LIS 15

Train to Gain Detailed Learner and Aim Funding report

The Train to Gain (TtG) Detailed Learner and Aim Funding (DLAF) report describes the learner and aim data used to calculate TtG funding. This report is the TtG equivalent of the FE Details Learner and Aim Funding.

Train to Gain Calculation Steps report

The Train to Gain (TtG) Calculation Steps report describes the steps taken when calculating TtG funding for learners and aims. This report is the TtG equivalent of the FE Calculations Steps.

Train to Gain Calculation Errors report

The Train to Gain (TtG) Calculation Errors report describes errors that have occurred whilst calculating TtG funding for learners and aims. This report is the TtG equivalent of the FE Calculations Errors.

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Further Information

ILR 2007/08 Specification	Specification of the Individualised Learner Record Batch Data Capture File for 2007/08 – available from www.lsc.gov.uk/providers/Data/Datacollection/ILR/ILR+Documents+2007-2008
Validation rules spreadsheet and guidance	Validation rules release 4 (as used in LIS 15.01) and guidance – available from www.lsc.gov.uk/providers/Data/Datacollection/ILR/ILR+Documents+2007-2008
LIS 15.01 User Guide	LIS 15.01 User Guide – available from www.lsc.gov.uk/providers/Data/Software/LIS/LIS15-01
Log in to LIS	LIS 15.01 user guide page 13.
Access Batch Import Screen	LIS 15.01 user guide 'Navigating the Data menu' (page 16) and 'Importing and Validating ILR data' (page 21).
Learner Numbers with Funding Report	LIS 15.01 user guide 'Running reports' (page 43).
Funding Calculation	LIS 15.01 user guide 'Calculating Funding data' (page 37).
Select Provider	LIS 15.01 user guide 'Change the Provider' (page 23).
Select Collection Type	LIS 15.01 user guide 'Change the Collection Type' (page 22).
Select Collection	LIS 15.01 user guide 'Change the Collection Code' (page 22).
Link to LAD	LIS 15.01 user guide 'Link to the LAD' (page 24).
Batch Import – Add File	LIS 15.01 user guide 'Add ILR Data File' (page 26).
Batch Import – Select Operations	LIS 15.01 user guide 'Select Operations' (page 25), 'Select Reports' (page 30) and 'Import ILR Data using Batch Import' (page 21).
View ILR data	LIS 15.01 user guide 'Viewing ILR Data' (page 33).
Report Manager	LIS 15.01 user guide 'Running Reports' (page 43).
Report Filters	LIS 15.01 user guide 'Using Filters in Reports' (page 47).
ILR Export Screen	LIS 15.01 user guide 'Exporting ILR Data Using ILR Export' (page 52).
Maintaining LIS Options	LIS 15.01 user guide 'Maintaining LIS Options' (page 59).