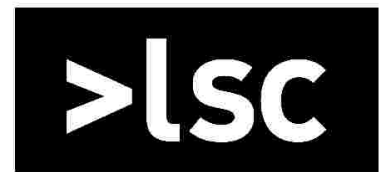


# Quick Start

## Learner Information Suite 14.02



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### Introduction

This Quick Start is for users of the Learner Information Suite (LIS) version 14.02. Using LIS version 14.02, providers can validate 2006/07 ILR data, calculate FE funding, calculate TtG Funding and calculate derived variables and run reports against their data. LIS 14.02 also exports valid ILR files. This document summarises the steps involved to achieve this task. It identifies where in the existing guides to look for more help.

### Notes on Use:

Clicking on any of the blue hyperlinks on pages 1 and 2 in this document will take you to the relevant information link on page 2 – further information. On page 2, links are provided to the relevant sections of the LSC website and page references for the user guide.

### Procedures

<b>This procedure should be used to:</b>	Import and validate an ILR file using LIS 14.02.
<b>It applies to:</b>	All ILR collection types (FE; WBL; ACL; ESF SR and Ufl)

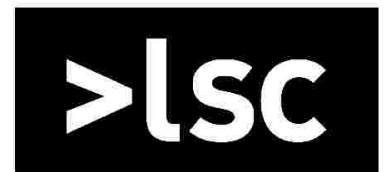
Step	Action
1	Use your own MIS to create an ILR data file in the correct format (as described in the <a href="#">ILR 2006/07 specification</a> ).
2	<a href="#">Log in to LIS 14.02</a> and access the <a href="#">Batch Import screen</a> .
3	Ensure that the latest version of the <a href="#">LAD</a> has been downloaded and linked to LIS 14.02.
3	Select the correct <a href="#">Provider</a> ; Collection Type and <a href="#">Collection</a> (which must match your ILR data file).
4	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 14.02 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.
5	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.
6	Resolve any import errors (use the rule name and description as listed in the report and refer to the <a href="#">ILR specification</a> . 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. <b>Note:</b> 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.
7	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.
8	If it is not, use the details in the Errors section of the report and <a href="#">look at the ILR data</a> to locate the source of the error. The rule name indicates the fields to check. You may also wish to refer to the <a href="#">ILR specification</a> , the <a href="#">validation rules spreadsheet</a> and <a href="#">validation rules guidance</a> document. <b>Note:</b> You may find it useful to run the Rule Violations report (from the <a href="#">Report Manager</a> screen) to see a more detailed breakdown of where the errors occur. You can use <a href="#">filters</a> with this report to focus on particular learners or learning aims or types of errors, such as FE funding or import errors.
9	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](#), and use the [ILR Export](#) screen to prepare a file to send to the LSC.**

Continued

# Quick Start

## Learner Information Suite 14.02



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<b>These procedures should be used to:</b>	Calculate FE funding, print a Learner Number with Funding report and reconcile FE data.
<b>They apply to:</b>	FE and Ufl 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.

<b>These procedures should be used to:</b>	Calculate TtG funding, print a TtG Summary of Funding report.
<b>They apply to:</b>	FE and WBL collection types.

### Train to Gain Funding

TtG funding can be calculated from either FE or WBL ILR data files that contain TtG funded learners, where ILR field A10 = 60. 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 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.

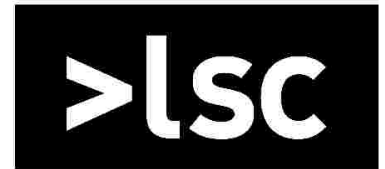
The results of the calculations can be seen by using the TtG Funding Viewer screen.

### 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 FE TtG funding is taken from the file preparation date in the imported ILR data file and for WBL TtG funding it is based upon the period in the file extension, for example a W01 return would produce a default current period of period 1. 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.

# Quick Start

## Learner Information Suite 14.02



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### Further Information

ILR 2006/07 Specification	Specification of the Individualised Learner Record Batch Data Capture File for 2006/07 – available from <a href="http://www.lsc.gov.uk/National/Partners/Data/DataCollection/ILR/ILRSpecification/ILRSpec200607">www.lsc.gov.uk/National/Partners/Data/DataCollection/ILR/ILRSpecification/ILRSpec200607</a>
Validation rules spreadsheet and guidance	Validation rules release 1.5 (as used in LIS 14.02) and guidance – available from <a href="http://www.lsc.gov.uk/National/Partners/Data/DataCollection/ILR/ILR0607">www.lsc.gov.uk/National/Partners/Data/DataCollection/ILR/ILR0607</a>
LIS 14.02 User Guide	LIS 14.02 User Guide – available from <a href="http://www.lsc.gov.uk/National/Partners/Data/ProviderSoftware/LIS/2005-06">www.lsc.gov.uk/National/Partners/Data/ProviderSoftware/LIS/2005-06</a>
Log in to LIS	<a href="#">LIS 14.02 user guide</a> page 14.
Access Batch Import Screen	<a href="#">LIS 14.02 user guide</a> 'Navigating the Data menu' (page 17) and 'Importing and Validating ILR data' (page 22).
Learner Numbers with Funding Report	<a href="#">LIS 14.02 user guide</a> 'Running reports' (page 43).
Funding Calculation	<a href="#">LIS 14.02 user guide</a> 'Calculating Funding data' (page 37).
Select Provider	<a href="#">LIS 14.02 user guide</a> 'Change the Provider' (page 24).
Select Collection Type	<a href="#">LIS 14.02 user guide</a> 'Change the Collection Type' (page 23).
Select Collection	<a href="#">LIS 14.02 user guide</a> 'Change the Collection Code' (page 23).
Link to LAD	<a href="#">LIS 14.02 user guide</a> 'Link to the LAD' (page 25).
Batch Import – Add File	<a href="#">LIS 14.02 user guide</a> 'Add ILR Data File' (page 27).
Batch Import – Select Operations	<a href="#">LIS 14.02 user guide</a> 'Select Operations' (page 26), 'Select Reports' (page 30) and 'Import ILR Data using Batch Import' (page 22).
View ILR data	<a href="#">LIS 14.02 user guide</a> 'Viewing ILR Data' (page 32).
Report Manager	<a href="#">LIS 14.02 user guide</a> 'Running Reports' (page 43).
Report Filters	<a href="#">LIS 14.02 user guide</a> 'Using Filters in Reports' (page 46).
ILR Export Screen	<a href="#">LIS 14.02 user guide</a> 'Exporting ILR Data Using ILR Export' (page 50).
Maintaining LIS Options	<a href="#">LIS 14.02 user guide</a> 'Maintaining LIS Options' (page 58).