



Learner Information Suite 17.01 User Guide

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1. Introduction

1.1 Purpose

This document describes how to install and use the Learner Information Suite (LIS) version 17.01.

1.2 Background

The LIS is a part of the LSC's data capture systems that enable efficient collection and management of learner information. Other parts include:

- Provider Batch
- Provider On-line
- Learning Aim Database (LAD).

The LIS is designed for use by Provider Batch users.

LIS 17.01 is used to validate individualised learner record (ILR) data for 2009/10, calculate derived variables, calculate Employer Responsive (ER), Learner Responsive (LR) funding data and run reports against this data. The LIS also exports valid data and reports for transmission to the LSC through the Provider Batch online data collection portal.

Further help is available on the following websites:

- The Information Authority (IA); the ILR (including the validation rules used by the LIS) is documented at:
<http://www.theia.org.uk/downloads/ilrdocuments/>
 - The LSC; LIS 17.01 documentation is available at :
www.lsc.gov.uk/providers/Data/Software/LIS/LIS17-01.htm
-

1.3 Previous Versions

LIS series 17 can co-exist with earlier series of the LIS. It can therefore be installed on a PC which already has LIS 16 (or 15 or 14 or 13) installed. If you have an earlier version of LIS series 17 installed on your PC, it is recommended that you uninstall it first.

LIS series 17 is designed for use with 2009/10 ILR data for ER, LR, ASL, ESF SR and UFI providers. Providers should continue to use LIS series 16 for processing their 2008/09 ILR returns.

Warning: It is advisable not to remove the shared files when uninstalling some old versions of LIS.

1.4 Support Materials

For support:

- check the LIS section of the LSC's website:
www.lsc.gov.uk/providers/data/software/LIS
 - Providers in regions that have transitioned to contacting the Data Service directly for their support should contact the Service Desk by emailing servicedesk@thedata-service.org.uk or calling 08702 670001
 - Other providers should contact their Partnership Adviser
-

2. Installing LIS

2.1 Overview

The LIS installation files are available for download from the LSC website: www.lsc.gov.uk/providers/Data/Software/LIS/LIS17-01.htm.

The software should be installed onto a PC matching at least the minimum specification required. Refer to Section 2.2 System Requirements below.

2.2 System Requirements

The LIS is supported on the following operating systems:

- Windows 2000
- Windows XP Home or Professional
- Windows Vista

The PC should ideally support an internet connection, to enable you to check the LSC website for updates, and to download the Learning Aim Database (LAD).

Note: You or the person installing the LIS must have administrator rights on the host PC in order to successfully install the software.

2.3 Downloading LIS for Installation

The installation files are located on the LSC website for you to download, unzip and install onto your PC. Users of Windows 2000 may need additional software to unzip the installation files. To download the files, complete the following steps:

Step	Action
1	Launch your internet browser and navigate to the LIS section of the LSC website: www.lsc.gov.uk/providers/data/software/LIS The page has links to the latest version for each teaching year, and also to all previous versions for each teaching year.
2	Choose the LIS 17.01 page link to display the LIS 17.01 page, the latest version of the LIS software is always put at the top of this page. It contains file download links and gives access to useful information about the software, which is updated when necessary.
3	Choose the full installation by clicking on the zip file download. The file download dialogue box displays.
4	Select the option to Save this program to disk. Click OK.
5	Select the destination directory for the download on your PC. Click Save. The file will download to your PC in the location specified. The download progress displays.

2. Installing LIS, Continued

2.4 Running the LIS Installation

To be able to run the installation program you *must* use full administrator rights on your PC.

Please contact your local IT Support team, regarding your administrator rights.

Notes

- 1) Like LIS series 16, LIS 17 uses .NET Framework 2.0. The LIS installation process will check whether this exists on the PC when it runs, if it does not it will produce an error message. The .NET framework 2.0 installation file is also available from the LIS download page used previously. Download the .NET framework installation file and re-run the LIS 17 installer.
- 2) Once installed, the LIS will also require a postcode data file to be imported. This can also be found on the LIS download page along with a Data Update file, the latest versions will always be available from this page. Guidance on updating the LIS with Data Update can be found within Section 16.7 Updating your LIS Data (See page 76).
- 3) Users who have installed the LIS 17 Beta version, should uninstall it before installing any later released versions.
- 4) The software should only be installed locally from the hard disk of a PC and not from a network drive. It is recommended that you close down all other applications before beginning the installation process.

Important: When the software has been installed on a Microsoft Vista machine, the software should be run once whilst the administrator rights are in operation. Otherwise, the software may not work for people with standard user rights.

To run the installation, complete the following steps:

Step	Action
1	Unzip the downloaded LIS file and navigate to the location. Double click the file setup.exe . The Preparing to Install screen displays. Cancel stops the installation programme. Once the Preparing to Install screen is complete, the Welcome screen appears.
2	Click Next . The Choose Destination Location dialogue box displays.

Continued on next page

2. Installing LIS, Continued

2.4 Running the LIS Installation, continued

Step	Action										
3	<p>Use the table below to help decide:</p> <table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>You click Browse</td> <td>The Choose Folder dialogue box displays. Select the required location for the installation. Click OK. Cancel will cancel the selected location and maintain the default setting. Go to step 4.</td> </tr> <tr> <td>You click Back</td> <td>You return to the previous Welcome screen as in step 1.</td> </tr> <tr> <td>You click Next</td> <td>The Setup Status screen displays. Go to step 5.</td> </tr> <tr> <td>You click Cancel</td> <td>You will exit the installation programme. Please refer to Section 2.5 Cancelling the LIS Installation (See page 9).</td> </tr> </tbody> </table>	IF...	THEN...	You click Browse	The Choose Folder dialogue box displays. Select the required location for the installation. Click OK . Cancel will cancel the selected location and maintain the default setting. Go to step 4.	You click Back	You return to the previous Welcome screen as in step 1.	You click Next	The Setup Status screen displays. Go to step 5.	You click Cancel	You will exit the installation programme. Please refer to Section 2.5 Cancelling the LIS Installation (See page 9).
IF...	THEN...										
You click Browse	The Choose Folder dialogue box displays. Select the required location for the installation. Click OK . Cancel will cancel the selected location and maintain the default setting. Go to step 4.										
You click Back	You return to the previous Welcome screen as in step 1.										
You click Next	The Setup Status screen displays. Go to step 5.										
You click Cancel	You will exit the installation programme. Please refer to Section 2.5 Cancelling the LIS Installation (See page 9).										
4	Click Next . The installation begins and the setup status screen displays.										
5	<p>You may be required to restart your PC once the installation is complete. Click the radio button to select the option required.</p> <p>Note: If you are prompted to restart your computer after the software installation, it is favourable that you do so, to ensure the application will work correctly. Whether the prompt displays or not depends on your PC configuration.</p>										
6	<p>Click Finish. The installation is complete. A shortcut icon is now present on the desktop.</p> <p>The software is also accessible from the Start Programs list.</p>										

2.5 Cancelling the LIS Installation

You can cancel the installation if required, during steps 1 to 4 of Section 2.4 Running the LIS Installation (See page 8).

To cancel the installation, complete the following steps:

Step	Action						
1	Click Cancel . The Exit Setup dialogue box displays.						
2	<p>Click a button:</p> <table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>You click Yes</td> <td>The setup programme closes.</td> </tr> <tr> <td>You click No</td> <td>The installation programme returns to the point when Cancel was clicked and continues the installation.</td> </tr> </tbody> </table>	IF...	THEN...	You click Yes	The setup programme closes.	You click No	The installation programme returns to the point when Cancel was clicked and continues the installation.
IF...	THEN...						
You click Yes	The setup programme closes.						
You click No	The installation programme returns to the point when Cancel was clicked and continues the installation.						

3. Uninstalling LIS

3.1 Overview

LIS has a facility to allow you to uninstall the software easily. You can begin the un-installation process in a number of ways:

- use the Uninstall shortcut from the Start menu
- run setup.exe from the installation folder.

3.2 Uninstall from the Start Menu

To uninstall LIS 17.01 from your PC using the **Uninstall** shortcut, complete the following steps:

Note: you must be logged on with Administrator rights to uninstall the software.

Step	Action						
1	Select the Uninstall LIS 17.01 shortcut from Start Programs Learner Information Suite LIS Maintenance Uninstall v17.01 . The Uninstall message appears.						
2	Click a button: <table border="1"><thead><tr><th>IF...</th><th>THEN...</th></tr></thead><tbody><tr><td>You click Yes</td><td>Go to step 3.</td></tr><tr><td>You click No</td><td>The uninstall program terminates.</td></tr></tbody></table>	IF...	THEN...	You click Yes	Go to step 3.	You click No	The uninstall program terminates.
IF...	THEN...						
You click Yes	Go to step 3.						
You click No	The uninstall program terminates.						
3	The uninstall program runs. Cancel exits the program. When complete, the box closes and LIS 17.01 is uninstalled.						

3.3 Uninstall using Setup

To uninstall LIS 17.01 from your PC using **setup.exe**, complete the following steps:

Note: you must be logged on with Administrator rights to uninstall the software.

Step	Action						
1	Navigate to the setup.exe file used to install LIS 17.01 on your PC and double-click the file. The Preparing to Install screen appears. Cancel will exit the program. Once completed, the Welcome screen displays.						
2	Select the Remove radio button and click Next . The Confirm Uninstall dialogue box displays.						
3	Click a button: <table border="1"><thead><tr><th>IF...</th><th>THEN...</th></tr></thead><tbody><tr><td>You click OK</td><td>Go to step 4.</td></tr><tr><td>You click Cancel</td><td>You return to the Welcome screen as in step 1.</td></tr></tbody></table>	IF...	THEN...	You click OK	Go to step 4.	You click Cancel	You return to the Welcome screen as in step 1.
IF...	THEN...						
You click OK	Go to step 4.						
You click Cancel	You return to the Welcome screen as in step 1.						

4	The Setup Status window appears. Cancel will cancel the un-installation of LIS 17.01. On completion, the Maintenance Complete screen displays. Click Finish .
---	--

4. The Learning Aim Database

4.1 Overview

The Learning Aim Database (LAD) is an LSC application that holds information on learning aims and associated funding and statistical information.

This information is used by the LIS and other LSC systems to validate ILR data calculate derived variables and calculate funding.

The LAD is available to search online, or you can download an extract of LAD data. More information about the LAD is available from the LAD pages of the LSC website at www.lsc.gov.uk/providers/data/software/LAD.

4.2 The LAD and LIS

Because the LIS requires information from the LAD to process data, it is necessary to create a link between the LIS and a download from the LAD.

The data in the LAD is updated frequently. Regularly download a new version to ensure you are working with the most current information.

4.3 Downloading the LAD from the Website

To download the latest version of the LAD, complete the following steps:

Step	Action
1	Browse to the LAD on the LSC provider extranet: http://providers.lsc.gov.uk/LAD .
2	Click LAD Downloads in the top menu bar. The LAD downloads page displays.
3	Click on the file you wish to download. For the LIS you will need a file in Microsoft Access format (.mdb) file. For LIS 17.01 you can download either: <ul style="list-style-type: none">the entire LAD, which contains information for the relevant teaching year as well as two other years; orthe LAD for 2009/10 The File Download dialogue box displays. During steps 3 to 5, Cancel stops the download.
4	Select the Save this program to disk option and click OK . The Save As dialogue box displays.
5	You may choose to change the location and file name for saving to your PC. When you have completed this click Save . The download begins and the Download dialogue box displays.

Continued on next page

4. The Learning Aim Database, Continued

4.3 Downloading the LAD from the Website, continued

Step	Action								
6	<p data-bbox="544 387 1372 454">On completion of the download, the Open and Open Folder buttons become available.</p> <table border="1" data-bbox="563 488 1361 775"><thead><tr><th data-bbox="563 488 911 533">IF...</th><th data-bbox="911 488 1361 533">THEN...</th></tr></thead><tbody><tr><td data-bbox="563 533 911 633">You click Open</td><td data-bbox="911 533 1361 633">The file will be opened for you to access and unzip to a suitable location on your PC.</td></tr><tr><td data-bbox="563 633 911 701">You click Open Folder</td><td data-bbox="911 633 1361 701">The folder containing the downloaded LAD is opened.</td></tr><tr><td data-bbox="563 701 911 775">You click Close</td><td data-bbox="911 701 1361 775">The Download dialogue box is closed.</td></tr></tbody></table>	IF...	THEN...	You click Open	The file will be opened for you to access and unzip to a suitable location on your PC.	You click Open Folder	The folder containing the downloaded LAD is opened.	You click Close	The Download dialogue box is closed.
IF...	THEN...								
You click Open	The file will be opened for you to access and unzip to a suitable location on your PC.								
You click Open Folder	The folder containing the downloaded LAD is opened.								
You click Close	The Download dialogue box is closed.								
7	<p data-bbox="544 824 1372 882">You will need to unzip the LAD then link it to the LIS. Refer to Section 7.6 Link to the LAD (See page 28).</p>								

5. Login to LIS

5.1 Overview

The LIS can be started from the Start menu or from the shortcut icon on your desktop. You will need to enter a password to login.

By default when the software is installed onto your PC, the password is set to “**password**”. You may need to change the password in line with your organisation’s security policy.

5.2 Accessing LIS from the Start Menu

To access LIS 17.01 from the Start Menu choose **Start | Programs | Learner Information Suite v17.01 | LIS v17.01**

5.3 Accessing LIS from the Desktop

To access LIS 17.01 from your desktop, double click the **LIS v17.01** icon. This is automatically created as a desktop shortcut during installation.

5.4 Login to LIS

To login to LIS 17.01, complete the following steps:

Step	Action
1	<p>Start LIS 17.01.</p> <p>In the Learner Information Suite Login dialogue box, type the password “password” (in regular font and using lower case, without the quote marks) into the password field.</p> <p>Note: If the password has already been changed then use that password to login.</p> <p>If you click Cancel, the dialogue box closes and the LIS will not start.</p>
2	<p>Click Login.</p> <p>This logs you into LIS and briefly displays a splash screen. The Welcome screen displays once the application loads.</p> <p>You have now logged into LIS and can use it.</p>

5. Login to LIS, Continued

5.5 Changing your Password

The LIS password can be changed if required.

However, note that:

- if you forget the new password, the LIS software must be uninstalled and then re-installed to set the password back to the default setting of “**password**”
- each time you upgrade the LIS software the password will be re-set to “**password**”.

To change the password, complete the following steps:

Step	Action						
1	Start LIS 17.01. In the Learner Information Suite Login dialogue box, enter your current password into the password field.						
2	Click the Change checkbox.						
3	Click Login . The Change Password dialogue box appears.						
4	Enter a new password into both the New Password field and the Verify Password field. The new password and verify password fields must match.						
5	Click OK . <table border="1" data-bbox="560 1160 1361 1357"><thead><tr><th>IF...</th><th>THEN...</th></tr></thead><tbody><tr><td>The passwords match</td><td>Continue to step 6.</td></tr><tr><td>The passwords do not match</td><td>An error message will appear. Click OK and go back to step 4.</td></tr></tbody></table>	IF...	THEN...	The passwords match	Continue to step 6 .	The passwords do not match	An error message will appear. Click OK and go back to step 4 .
IF...	THEN...						
The passwords match	Continue to step 6 .						
The passwords do not match	An error message will appear. Click OK and go back to step 4 .						
6	The Welcome screen displays. The password has now been changed and you may start to use LIS.						

6. Navigating Around LIS

6.1 Overview

To navigate around and access the LIS screens, you have two options:

- menu bar
 - Navigation tree.
-


6.2 Navigation using the Menu Bar

The LIS application menu bar allows you to move around the screens by selecting a menu option and then clicking the required item.

All types of collection - ASL, ESF SR, LR, UFI and ER - are accessed from the same menu options. The Batch Import screen allows the collection type to be selected as well as the collection itself. Refer to Section 7.4 Change the Collection Type (See page 24).

6.3 Navigating the File Menu

The following step shows the File menu option:

Step	Action
1	<p>Click File. You can also use Alt-F to access the File menu.</p> <p>There is only one option available, Exit.</p> <p>Selecting the Exit option will close the LIS. You can also use  in the top right hand corner of the application window to close the application.</p>

6.4 Navigating the View Menu

The following steps show the View menu option:

Step	Action
1	<p>Click View. You can also use Alt-V to access the View menu.</p> <p>The following options are available:</p> <ul style="list-style-type: none">• ILR Data Viewer• ER Funding Viewer (LIS 17.01 onwards)• LR Funding Viewer (LIS 17.02 onwards)

Continued on next page

6. Navigating Around LIS, Continued

6.4 Navigating the View Menu, continued

Step	Action
2	<p>From within the View menu, select ILR Data Viewer.</p> <p>The ILR Data Viewer screen displays. This screen allows you to:</p> <ul style="list-style-type: none">• search for specific learners• view details for a selected learner from the imported ILR data• view rule violations for the selected learner• link to Report Manager with the learner reference filter pre-populated. <p>Note: The ILR Data Viewer is highlighted within the Navigation tree</p>
3	<p>From within the View menu, select ER Data Funding Viewer.</p> <p>The ER Funding Viewer screen displays. This screen allows you to view imported and calculated data by:</p> <ul style="list-style-type: none">• searching for specific learners• viewing details for a selected learner from the imported ILR and LAD data• viewing details for a selected learner from the calculated derived variables and ER funding data• viewing rule violations and calculation errors for the selected learner. <p>Note: The ER Funding Viewer is highlighted within the Navigation tree</p>
4	<p>The LR Funding Viewer screen displays. This screen allows you to view imported and calculated data by:</p> <ul style="list-style-type: none">• searching for specific learners• viewing details for a selected learner from the imported ILR and LAD data• viewing details for a selected learner from the calculated derived variables and LR funding data• viewing rule violations and calculation errors for the selected learner. <p>Note: The LR Funding Viewer is highlighted within the Navigation tree</p>

6. Navigating Around LIS, Continued

6.5 Navigating the Data Menu

The following steps show the Data menu option:

Step	Action
1	<p>Click Data. You can also use Alt-D to access the Data menu.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> • Batch Import • Export ILR File • Calculate Funding Data • Calculate Derived Data • Reconciliation (LIS 17.02 onwards) • Delete reconciliation data (LIS 17.02 onwards)
2	<p>From within the Data menu, select Batch Import.</p> <p>The Batch Import screen displays. The Batch Import screen combines most of the functionality of the LIS into a single screen. It allows you to:</p> <ul style="list-style-type: none"> • select a provider • select the correct collection type and collection period • link to the LAD • import ILR data • validate ILR data • calculate ER (LIS 17.01 onwards) or LR (LIS17.02 onwards) funding data, as appropriate for collection type and collection period • calculate derived data • add and delete files for import • export ILR data • export the LIS database (DB) and select the format • run DSAT software and select the DSAT location • run and print reports • save and load defaults • monitor the status of batch operations. • start and cancel the import process <p>Note: The Batch Import is highlighted within the Navigation tree</p>
3	<p>From within the Data menu, select Export ILR File.</p> <p>The Export ILR File screen displays. This screen allows you to:</p> <ul style="list-style-type: none"> • change the export area path • export ILR data to a file • select data type when exporting the ILR data • save and load defaults • cancel the export <p>Note: The Export ILR File is highlighted within the Navigation tree</p>

Continued on next page

6. Navigating Around LIS, Continued

6.5 Navigating the Data Menu, continued

Step	Action
4	<p>From within the Data menu, select Calculate Funding Data.</p> <p>The Calculate Funding Data screen displays. This screen allows you to:</p> <ul style="list-style-type: none">• run the LR funding calculations on your ILR data, as appropriate for collection type and collection period (LIS 17.02)• run the ER funding calculations on your ILR data, as appropriate for collection type and collection period• View the progress of each part of the calculation process• cancel the calculation <p>Note: The Calculate Funding Data is highlighted within the Navigation tree</p>
5	<p>From within the Data menu, select Calculate Derived Data.</p> <p>The Calculate Derived Data screen displays. This screen allows you to:</p> <ul style="list-style-type: none">• run the derived data calculations on your ILR data• cancel the calculations <p>Note: The Calculate Derived Data is highlighted within the Navigation tree</p>
6	<p>From within the Data menu, select Reconciliation. (LIS 17.02 onwards)</p> <p>The Reconciliation screen displays. This screen allows you to:</p> <ul style="list-style-type: none">• change Provider 1 and Provider 2 details, as appropriate• select the mode• reconcile two ILR files to check that continuing learners from the earlier file are present in the later file as expected• export a reconciliation file for transmission to the LSC• run the Reconciliation report <p>Note: The Reconciliation is highlighted within the Navigation tree</p>
7	<p>From within the Data menu, select Delete Reconciliation Data.</p> <p>The Delete Reconciliation Data dialog displays. This screen allows you to:</p> <ul style="list-style-type: none">• delete any previous reconciliation data.

6. Navigating Around LIS, Continued

6.6 Navigating the Reports Menu

The following steps show the Reports menu option:

Step	Action
1	<p>Click Reports. You can also use Alt-R to access the Reports menu.</p> <p>There is only one option available, Report Manager.</p>
2	<p>From within the Reports menu, select Report Manager.</p> <p>The Report Manager screen displays. This screen allows you to:</p> <ul style="list-style-type: none">• view the available reports, select as appropriate• run selected reports, with filters if required• view the output on screen and print the selected reports• export selected reports• export the LIS database (DB) / lookup tables. <p>Note: The Reports Manager is highlighted within the Navigation tree</p>

6.7 Navigating the General Menu

The following steps show the General menu option:

Step	Action
1	<p>Click General. You can also use Alt-G to access the General menu.</p> <p>The following options will be available:</p> <ul style="list-style-type: none">• Validation Rules• Log• Options• Postcodes
2	<p>In the General menu, select Validation Rules.</p> <p>The Validation Rules screen displays. This screen allows you to:</p> <ul style="list-style-type: none">• view the list of validation rules used by the LIS for validating ILR data• view detailed descriptions for rules in the list, including the severity level. <p>Note: The list contains all the rules used for validation for all collection types. The Collections column (Colls) displays categories that identify the collection type the rule is applied to. Refer to Section 15 Validation Rules (See page 69)</p> <p>Note: The Validation Rules is highlighted within the Navigation tree</p>

6. Navigating Around LIS, Continued

6.7 Navigating the General Menu, continued

Step	Action
3	<p>From within the General menu, select Log.</p> <p>The Log screen displays. This screen enables you to:</p> <ul style="list-style-type: none">• view a log of all operations carried out by the software since the log was last cleared. <p>Operation details include Date & Time, Module, Function and Messages, which are listed in ascending date order e.g. the most recent details are at the bottom of the list. Use the vertical scrollbar if required to view most recent results.</p> <p>Note: The Log is highlighted within the Navigation tree.</p>
4	<p>From within the General menu, select Options.</p> <p>The Options screen displays, with the following tabs available:</p> <ul style="list-style-type: none">• Status Information• Maintenance• Import Errors• Version Information <p>From within the Status Information tab, you can view:</p> <ul style="list-style-type: none">• view status information for the each ILR Batch Import process• view a summary count of learners, aims and dataset types <p>From within the Maintenance tab, you can view:</p> <ul style="list-style-type: none">• select a provider• truncate the log file• clear any locked interrupted processes in the database• compact the database• update the provider lists data .• update the link to Postcode Factors <p>From within the Import Errors tab, you can view:</p> <ul style="list-style-type: none">• view import errors <p>From within the Version Information tab, you can view the current version information for the:</p> <ul style="list-style-type: none">• LIS• linked-to LAD• Module Versions (LR /ER Funding Calculations, DLF Common and Derived Data Calculation)• Lookup Tables (Providers, Postcodes, TtG Broker Contracts, Postcode Area Cost Factors and Postcode Disadvantage Factors). <p>Note: The Options is highlighted within the Navigation tree</p>

Step	Action
5	<p>From within the General menu, select Postcodes.</p> <p>This option maintains the 'Outward' postcodes (eg. 'CV1') used for validation of ILR data and allows extra codes to be added when a new postcode is created by the Royal Mail.</p> <p>The Postcodes screen displays. The Postcodes screen allows you to:</p> <ul style="list-style-type: none"> • search for and view the postcodes included in the LIS • insert new postcodes • delete postcodes. <p>Note: The Postcodes is highlighted within the Navigation tree</p>

6.8 Navigating the Help Menu

The following steps show the Help menu option:


Step	Action
1	<p>Click Help. You can also use Alt-H to access the Help menu.</p> <p>There is only one option available, About Learner Information Suite.</p>
2	<p>From within the Help menu, select About Learner Information Suite.</p> <p>The About Learner Information Suite screen displays. The About Learner Information Suite screen allows you to:</p> <ul style="list-style-type: none"> • view LIS version information • view system information • link to the LIS page in the Data area of the LSC website: http://www.lsc.gov.uk/providers/Data/Software/LIS/

6. Navigating Around LIS, Continued

6.9 Navigation using the Navigation Tree

The LIS navigation tree allows you to move around the screens by expanding and selecting folder items representing the LIS screens.

The options are the same as in the menus, except there is no entry for Delete Reconciliation Data, as viewed via the Data menu option.

Step	Action
1	<p>The navigation tree folders appear on the left hand side of the Welcome screen. Click on the + symbol to the left of the LIS 2009/10 folder icon to expand the navigation tree.</p> <p>Note: you can use the  button to close the navigation tree display. To restart the navigation tree you must click on the title bar, where the screen title is displayed, below the menu options.</p>
2	<p>The following folders (screens) are available from the navigation tree:</p> <ul style="list-style-type: none">• Batch Import• ILR Data Viewer• Calculate Funding Data• LR Funding Viewer (LIS 17.02 onwards)• ER Funding Viewer• Calculate Derived Data• Export ILR File• Report Manager• Validation Rules• Log• Options• Postcodes• Reconciliation (LIS 17.02 onwards) <p>Click on the required folder, to display the relevant screen.</p>

7. Importing and Validating ILR Data

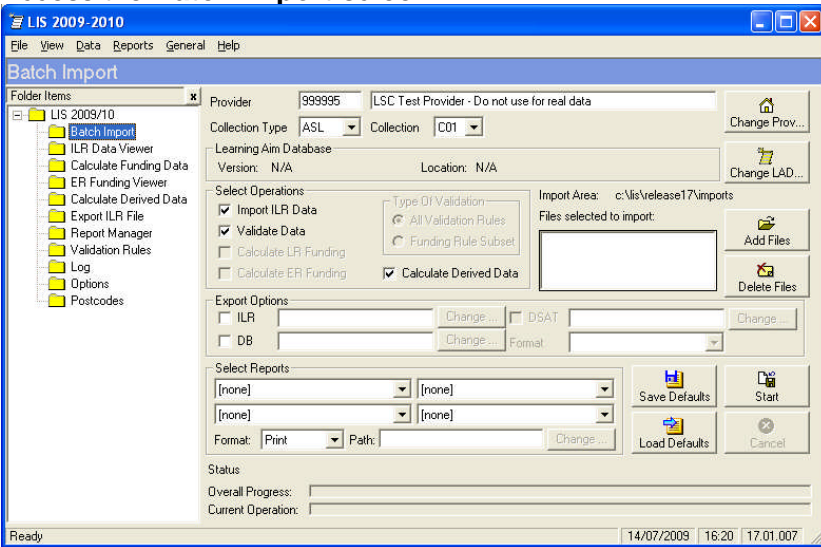
7.1 Overview

You can import and/or validate ILR data from the Batch Import screen.

Note: From the Batch Import screen you can choose to run many different operations, including importing and validating ILR data, running calculations and reports and exporting ILR data or the LIS database. These operations can be selected in various combinations.

7.2 Import ILR Data using Batch Import

To import and validate ILR data, complete the following steps:

Step	Action								
1	<p>Access the Batch Import screen:</p> 								
2	Set up the batch import as described in the following sections.								
3	<p>Click the Start button to start the processes selected.</p> <p>The processes start. Status and progress are displayed.</p> <table border="1" data-bbox="560 1473 1358 1832"> <thead> <tr> <th data-bbox="560 1473 959 1518">IF...</th> <th data-bbox="959 1473 1358 1518">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="560 1518 959 1630">You wish to cancel the process once it has started.</td> <td data-bbox="959 1518 1358 1630">Go to Section 7.15 Cancel the Import/Validate Process (See page 40).</td> </tr> <tr> <td data-bbox="560 1630 959 1731">You receive an import error message.</td> <td data-bbox="959 1630 1358 1731">Go to Section 7.16 What if the Import Process Aborts (See page 40).</td> </tr> <tr> <td data-bbox="560 1731 959 1832">You receive a confirmation that the process has completed successfully.</td> <td data-bbox="959 1731 1358 1832">Click OK and go to your required next action.</td> </tr> </tbody> </table>	IF...	THEN...	You wish to cancel the process once it has started.	Go to Section 7.15 Cancel the Import/Validate Process (See page 40).	You receive an import error message.	Go to Section 7.16 What if the Import Process Aborts (See page 40).	You receive a confirmation that the process has completed successfully.	Click OK and go to your required next action.
IF...	THEN...								
You wish to cancel the process once it has started.	Go to Section 7.15 Cancel the Import/Validate Process (See page 40).								
You receive an import error message.	Go to Section 7.16 What if the Import Process Aborts (See page 40).								
You receive a confirmation that the process has completed successfully.	Click OK and go to your required next action.								

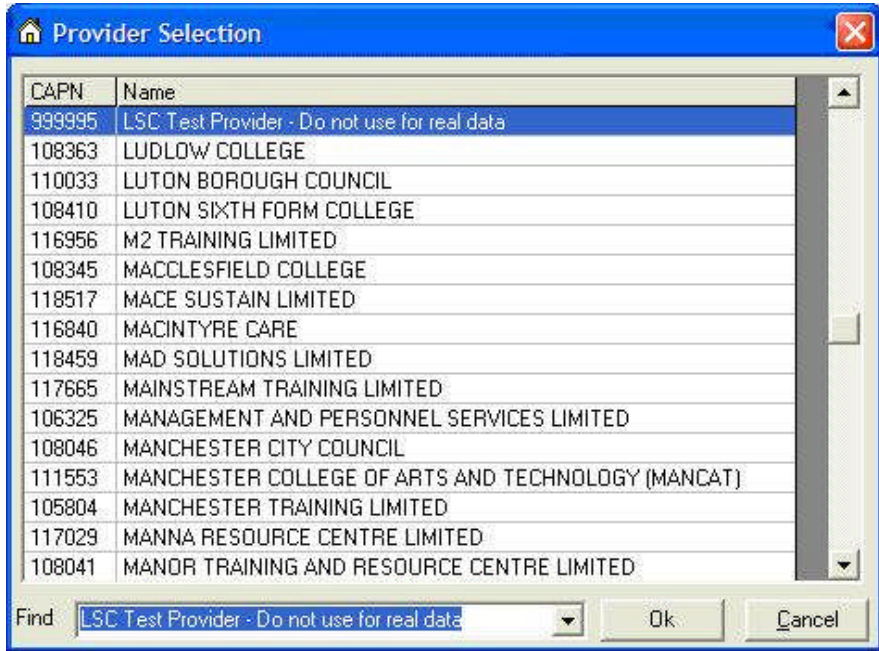
7. Importing and Validating ILR Data, Continued


7.3 Change the Provider

The first time you use LIS you will need to select the specific provider number and name.

Note: If you use more than one provider number for transmitting ILR data you must ensure the provider field displays the correct provider number and name for the ILR data you are importing. If the provider number does not match the provider reference in the ILR file name then the ILR import will not allow the file to be selected.

To change the provider, complete the following steps:

Step	Action
1	<p>Access the Batch Import screen by selecting Batch Import from the navigation tree.</p> <p>Click the Change Prov... button.</p> <p>The Provider Selection window displays:</p> 
2	<p>You can select a provider using any of the methods listed below:</p> <ul style="list-style-type: none"> • type the first few characters of the name into the Find field. The list will scroll as you type until the provider name that matches the characters typed displays. • search by entering the whole provider number in the Find field. • use the vertical scroll bar to scroll to your provider name and number. <p>Highlight the entry in the list.</p>

Step	Action						
3	<p>Click OK, to confirm your selection of provider.</p> <p>A dialogue box is displayed which requests the deletion of current provider data. Respond appropriately.</p> <p>Note: This dialogue box only displays if a previous provider was selected. If there was no provider selected, the prompt will not appear.</p> <p>To close the Provider Selection window, without selecting a provider, click either Cancel or .</p>						
4	<p>Click a button:</p> <table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>You want to change the provider name and delete any data previously imported for another provider.</td> <td>Click Yes. You return to the Batch Import screen and the new provider name and number displays.</td> </tr> <tr> <td>You do not want to change the provider name and delete any data previously imported for another provider.</td> <td>Click No. You return to the Batch Import screen and the provider is not changed.</td> </tr> </tbody> </table> <p>Note: You can also change provider details from the Maintenance Tab of the Options screen by clicking on the Provider... button.</p>	IF...	THEN...	You want to change the provider name and delete any data previously imported for another provider.	Click Yes . You return to the Batch Import screen and the new provider name and number displays.	You do not want to change the provider name and delete any data previously imported for another provider.	Click No . You return to the Batch Import screen and the provider is not changed.
IF...	THEN...						
You want to change the provider name and delete any data previously imported for another provider.	Click Yes . You return to the Batch Import screen and the new provider name and number displays.						
You do not want to change the provider name and delete any data previously imported for another provider.	Click No . You return to the Batch Import screen and the provider is not changed.						

7.4 Change the Collection Type

The Collection Type field in the Batch Import screen must display the code for the collection type being imported (ASL, ESF SR, LR, UFI and ER):

Step	Action
1	Click the drop down on the Collection Type field to list the collection types.
2	Click on the collection type required to select it.

7.5 Change the Collection Code

The Collection field in the Batch Import screen must display the code for the collection being imported:

The collection codes will be automatically displayed relevant to the collection type selected (for example, for LR the collection codes will be F01, F02, etc.)

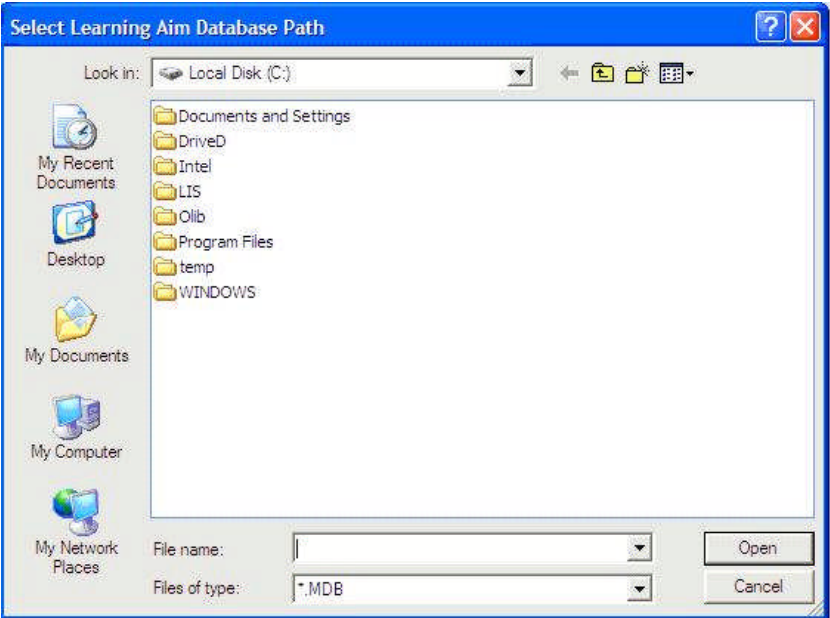

Step	Action
1	<p>Click the drop down on the Collection field to list the collection codes.</p> <p>Note: If you selected the Collection Type code using:</p> <ul style="list-style-type: none">• ASL, the Collection code will be prefixed with a letter C• ESF SR, the Collection code will be prefixed with a letter S• LR, the Collection code will be prefixed with a letter F• UFI, the Collection code will be prefixed with a letter U• ER, the Collection code will be prefixed with a letter W.
2	Click on the collection code required to select it.

7. Importing and Validating ILR Data, Continued

7.6 Link to the LAD

In order to validate your ILR data you must link LIS to a download from the LAD. Refer to Section 4.3 Downloading the LAD from the Website section (See page 12), for details of how to download the LAD tables.

To link LIS to the LAD, complete the following steps:

Step	Action
1	<p>Access the Batch Import screen.</p> <p>If this is the first time you have linked to the LAD, the Learning Aim Database Version and Location fields will be blank; otherwise, they will contain details for the previously linked LAD.</p>
2	<p>Click the Change LAD... button</p> <p>The Select Learning Aim Database Path window displays.</p>
3	<p>Use the explorer window to navigate to the directory that contains the most recent version of the LAD MDB.</p>  <p>Select the directory, and click Open.</p> <p>When you return to the Batch Import screen, the Learning Aim Database Version and Location fields are now populated / updated.</p> <p>To close the Select Learning Aim Database Path window, without selecting a LAD MDB, click either Cancel or .</p>

7. Importing and Validating ILR Data, Continued

7.7 Select Operations

The Select Operations area of the Batch Import screen allows you to select which processes to run:

- **Import ILR Data** – this operation checks the ILR data file against import validation rules, reports on any errors and only imports the file once it passes all import validation checks.
- **Validate Data** – this operation validates ILR data against the validation rules and reports any errors. However, this operation can only run when the ILR data file has been successfully imported into LIS. You can select the Type Of Validation by checking the appropriate radio button, either All Validation Rules or Funding Rule Subset.
- **Calculate LR Funding**– this operation calculates LR funding data for each learner that has passed validation. (**Note:** that the learners do not need to be fully valid but must be valid according to the funding subset of the validation rules.) Check box only available for certain collection types – see table below.
- **Calculate ER Funding**– this operation calculates ER funding data for each learner that has passed validation. (**Note:** that the learners must be fully valid.) Check box only available for certain collection types – see table below.

Collection Type	Option		
	Calculate LR Funding	Calculate ER Funding	Type Of Validation (Funding Rule/ All Validation)
ASL			
ESF SR			
LR	•		•
UFI	•		•
ER		•	

- **Calculate Derived Data** – this operation performs the derived data calculation, which calculates statistical values for each learner that has passed validation. (**Note:** that the learners do not need to be fully valid but must be valid according to the funding subset of the validation rules.) This option is only available if the applicable funding calculation has been run for these learners. These values are calculated and stored in the LIS database, and also used in some reports.

If all the operations are selected, LIS attempts to import the ILR data file first and, providing there are no import errors, it then validates the data, derives the statistical values and calculates funding data.

To select the operations to run, complete the following step:


Step	Action
1	<p>Access the Batch Import screen.</p> <p>Check the Select Operations box(es) for the required operation(s).</p> <p>Note: The validation and calculation operations can be run at a later stage if required without re-importing and validating the data.</p>

7. Importing and Validating ILR Data, Continued

7.8 Add ILR Data File

To add an ILR data file to import, complete the following steps:

Step	Action						
1	<p>Access the Batch Import screen</p> <table border="1" data-bbox="560 461 1362 752"> <thead> <tr> <th data-bbox="560 461 874 506">IF...</th> <th data-bbox="874 461 1362 506">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="560 506 874 618">This is the first time you are selecting a file for import</td> <td data-bbox="874 506 1362 618">The Import Area and Files selected to import fields will be blank. Go to step 3.</td> </tr> <tr> <td data-bbox="560 618 874 752">You have previously imported a file.</td> <td data-bbox="874 618 1362 752">The import fields will contain those details. They can be removed using the Delete Files facility as described below. Go to step 2.</td> </tr> </tbody> </table>	IF...	THEN...	This is the first time you are selecting a file for import	The Import Area and Files selected to import fields will be blank. Go to step 3 .	You have previously imported a file.	The import fields will contain those details. They can be removed using the Delete Files facility as described below. Go to step 2 .
IF...	THEN...						
This is the first time you are selecting a file for import	The Import Area and Files selected to import fields will be blank. Go to step 3 .						
You have previously imported a file.	The import fields will contain those details. They can be removed using the Delete Files facility as described below. Go to step 2 .						
2	<p>Check the file directory displayed:</p> <table border="1" data-bbox="560 842 1362 1099"> <thead> <tr> <th data-bbox="560 842 874 887">IF...</th> <th data-bbox="874 842 1362 887">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="560 887 874 999">You want to change the directory of the file for import</td> <td data-bbox="874 887 1362 999">Go to step 3.</td> </tr> <tr> <td data-bbox="560 999 874 1099">You want to use this file listed in the directory.</td> <td data-bbox="874 999 1362 1099">Go to step 6.</td> </tr> </tbody> </table>	IF...	THEN...	You want to change the directory of the file for import	Go to step 3 .	You want to use this file listed in the directory.	Go to step 6 .
IF...	THEN...						
You want to change the directory of the file for import	Go to step 3 .						
You want to use this file listed in the directory.	Go to step 6 .						
3	<p>Click the Add Files button. The Add ILR File to Batch window displays.</p>						

Step	Action						
4	<p>Navigate to the directory that contains the ILR file to be imported and select the file.</p>  <p>Note: If an incorrect provider, collection type or collection period have been selected, or if the file is not named correctly, the files will not be visible.</p> <p>To close the Add ILR File to Batch window, without selecting a file, click either Cancel or .</p>						
5	<p>Click Open.</p> <p>You return to the Batch Import screen and the Import Area and Files selected to import fields display details of the file selected for import.</p> <p>Note: If there is any ILR data already present within LIS, it will be deleted when the new data is imported. LIS uses a copy of the ILR data file you have selected – the original file is not affected.</p> <p>Once the import is completed you can delete the file(s) from the LIS import area by selecting them and clicking the Delete Files button.</p>						
6	<p>At this stage:</p> <table border="1" data-bbox="568 1653 1358 2007"> <thead> <tr> <th data-bbox="568 1653 962 1697">IF...</th> <th data-bbox="962 1653 1358 1697">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="568 1697 962 1872">You want to import the selected file, without choosing Export ILR, DB, DSAT Options or Selecting Reports</td> <td data-bbox="962 1697 1358 1872">Click on the Start button to activate the process.</td> </tr> <tr> <td data-bbox="568 1872 962 2007">You want to choose Export ILR, DB, DSAT Options or select Reports prior to importing the selected file</td> <td data-bbox="962 1872 1358 2007">Continue to Section 7.9 Export ILR.</td> </tr> </tbody> </table>	IF...	THEN...	You want to import the selected file, without choosing Export ILR, DB, DSAT Options or Selecting Reports	Click on the Start button to activate the process.	You want to choose Export ILR, DB, DSAT Options or select Reports prior to importing the selected file	Continue to Section 7.9 Export ILR.
IF...	THEN...						
You want to import the selected file, without choosing Export ILR, DB, DSAT Options or Selecting Reports	Click on the Start button to activate the process.						
You want to choose Export ILR, DB, DSAT Options or select Reports prior to importing the selected file	Continue to Section 7.9 Export ILR.						

7. Importing and Validating ILR Data, Continued

7.9 Export ILR

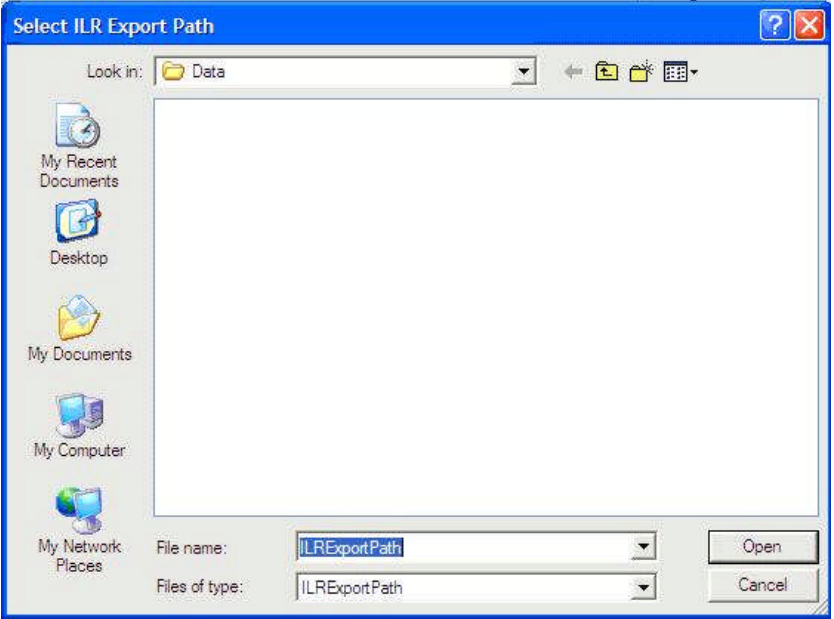

Using the **Export Options** area of the Batch Import screen you can export the ILR data ready for transmission to the LSC using Provider Batch.

Note: The Export ILR feature will export valid ILR data ONLY and any invalid data WILL NOT be exported. Therefore the export file may not be a reflection of the full ILR data file originally imported.

To export ILR data to a file for transmission to the LSC you will export the file to a folder on your PC. The default location displays after the Change... button is used. The default location is C:\LIS\Release17\exports.

To export your ILR data to a file, complete the following steps:

Step	Action						
1	<p>On the Batch Import screen, within the Export Options area, click on the ILR check box.</p> <table border="1" data-bbox="563 824 1361 1111"> <thead> <tr> <th data-bbox="563 824 962 869">IF...</th> <th data-bbox="962 824 1361 869">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="563 869 962 943">This is the first time you are exporting ILR data.</td> <td data-bbox="962 869 1361 943">The Change... button will activate. Go to step 3.</td> </tr> <tr> <td data-bbox="563 943 962 1111">You have previously exported ILR data.</td> <td data-bbox="962 943 1361 1111">The Change... button will activate and the file directory of the last ILR export displays. Go to step 2.</td> </tr> </tbody> </table>	IF...	THEN...	This is the first time you are exporting ILR data.	The Change... button will activate. Go to step 3 .	You have previously exported ILR data.	The Change... button will activate and the file directory of the last ILR export displays. Go to step 2 .
IF...	THEN...						
This is the first time you are exporting ILR data.	The Change... button will activate. Go to step 3 .						
You have previously exported ILR data.	The Change... button will activate and the file directory of the last ILR export displays. Go to step 2 .						
2	<p>Check the file directory displayed:</p> <table border="1" data-bbox="563 1205 1361 1420"> <thead> <tr> <th data-bbox="563 1205 962 1249">IF...</th> <th data-bbox="962 1205 1361 1249">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="563 1249 962 1352">You want to change the directory to which the ILR data will be exported</td> <td data-bbox="962 1249 1361 1352">Go to step 3.</td> </tr> <tr> <td data-bbox="563 1352 962 1420">You want to use this directory for the ILR export</td> <td data-bbox="962 1352 1361 1420">Go to step 5.</td> </tr> </tbody> </table>	IF...	THEN...	You want to change the directory to which the ILR data will be exported	Go to step 3 .	You want to use this directory for the ILR export	Go to step 5 .
IF...	THEN...						
You want to change the directory to which the ILR data will be exported	Go to step 3 .						
You want to use this directory for the ILR export	Go to step 5 .						

Step	Action						
3	<p>Click Change....</p> <p>The Select ILR Export Path window displays.</p> 						
4	<p>Use the explorer window to navigate to and select the new directory for your ILR data export, change the file name (if appropriate) and click Open.</p> <p>You will now be returned to the Batch Import screen. The Export ILR field details the new location of the ILR export.</p> <p>To close the Select ILR Export Path window, without selecting a directory or changing the filename, click either Cancel or .</p>						
5	<p>The ILR field displays details of the directory selected for the ILR export.</p> <p>Note: You can also export to an external drive, if required, by selecting the external directory location within the Select ILR Export Path window.</p>						
6	<p>At this stage:</p> <table border="1" data-bbox="568 1491 1350 1910"> <thead> <tr> <th data-bbox="568 1491 962 1536">IF...</th> <th data-bbox="962 1491 1350 1536">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="568 1536 962 1738">You want to import the selected file and export ILR data, without choosing the Export DB and DSAT Options or Selecting Reports</td> <td data-bbox="962 1536 1350 1738">Click on the Start button to activate the process.</td> </tr> <tr> <td data-bbox="568 1738 962 1910">You want to choose Export DB and DSAT Options or Select Reports prior to importing the selected file and export ILR data</td> <td data-bbox="962 1738 1350 1910">Continue to Section 7.10 Export DB.</td> </tr> </tbody> </table>	IF...	THEN...	You want to import the selected file and export ILR data, without choosing the Export DB and DSAT Options or Selecting Reports	Click on the Start button to activate the process.	You want to choose Export DB and DSAT Options or Select Reports prior to importing the selected file and export ILR data	Continue to Section 7.10 Export DB.
IF...	THEN...						
You want to import the selected file and export ILR data, without choosing the Export DB and DSAT Options or Selecting Reports	Click on the Start button to activate the process.						
You want to choose Export DB and DSAT Options or Select Reports prior to importing the selected file and export ILR data	Continue to Section 7.10 Export DB.						
7	<p>After the batch import is complete you can view the exported ILR data file by opening the file from the directory selected in step 4 and transmit it to the LSC using Provider Batch.</p>						

7. Importing and Validating ILR Data, Continued

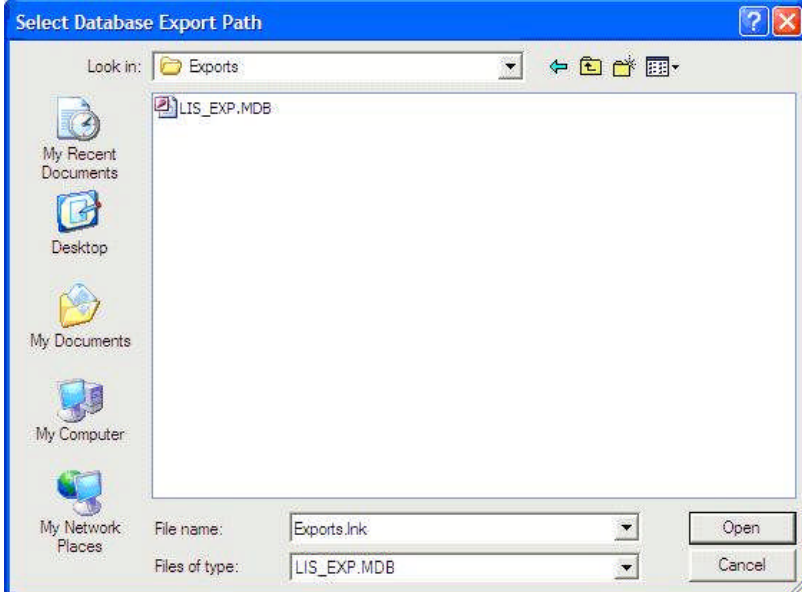

7.10 Export DB (database)

Using the Export Options area of the Batch Import screen, the LIS provides the Export DB function to allow you to view and manipulate the data held within the internal LIS database.

Note: This does NOT create a file that is suitable to send to the LSC. Files sent to the LSC **must** be exported using ILR Export. Refer to Section 7.9 Export ILR (See page 32).

To use the Export DB facility, complete the following steps:

Step	Action						
1	<p data-bbox="523 656 1331 719">On the Batch Import screen, within the Export Options area, click on the Export DB checkbox.</p> <table border="1" data-bbox="560 719 1294 1039"> <thead> <tr> <th data-bbox="560 719 890 763">IF...</th> <th data-bbox="890 719 1294 763">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="560 763 890 869">This is the first time you are exporting the database.</td> <td data-bbox="890 763 1294 869">The Change... button will activate. Go to step 3.</td> </tr> <tr> <td data-bbox="560 869 890 1039">You have previously exported the database.</td> <td data-bbox="890 869 1294 1039">The Change... button will activate and the file directory of the last database export is displayed. Go to step 2.</td> </tr> </tbody> </table>	IF...	THEN...	This is the first time you are exporting the database.	The Change... button will activate. Go to step 3 .	You have previously exported the database.	The Change... button will activate and the file directory of the last database export is displayed. Go to step 2 .
IF...	THEN...						
This is the first time you are exporting the database.	The Change... button will activate. Go to step 3 .						
You have previously exported the database.	The Change... button will activate and the file directory of the last database export is displayed. Go to step 2 .						
2	<p data-bbox="523 1095 963 1122">Check the file directory displayed:</p> <table border="1" data-bbox="560 1133 1294 1420"> <thead> <tr> <th data-bbox="560 1133 890 1178">IF...</th> <th data-bbox="890 1133 1294 1178">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="560 1178 890 1317">You want to change the directory to which the database is to be exported</td> <td data-bbox="890 1178 1294 1317">Go to step 3.</td> </tr> <tr> <td data-bbox="560 1317 890 1420">You want to use this directory for the database export</td> <td data-bbox="890 1317 1294 1420">Go to step 5.</td> </tr> </tbody> </table>	IF...	THEN...	You want to change the directory to which the database is to be exported	Go to step 3 .	You want to use this directory for the database export	Go to step 5 .
IF...	THEN...						
You want to change the directory to which the database is to be exported	Go to step 3 .						
You want to use this directory for the database export	Go to step 5 .						

Step	Action						
3	<p>Click Change...</p> <p>The Select Database Export Path window displays.</p> 						
4	<p>Use the explorer window to navigate to and select the new directory for your database export, change the file name (if appropriate) and click Open.</p> <p>You will now be returned to the Batch Import screen. The Export DB field details the new location of the database export.</p> <p>To close the Select Database Export Path window, without selecting a directory or changing the filename, click either Cancel or .</p>						
5	<p>Using the Format drop down list, select the required format for the database export.</p>						
6	<p>At this stage:</p> <table border="1" data-bbox="547 1402 1305 1888"> <thead> <tr> <th data-bbox="547 1402 930 1447">IF...</th> <th data-bbox="930 1402 1305 1447">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="547 1447 930 1653">You want to import the selected file, export the ILR data and export the database, without using exporting DSAT option or Selecting Reports</td> <td data-bbox="930 1447 1305 1653">Click on the Start button to activate the process.</td> </tr> <tr> <td data-bbox="547 1653 930 1888">You want to use the export DSAT option or choose Selected Reports prior to importing the selected file and exporting the ILR file and exporting the database</td> <td data-bbox="930 1653 1305 1888">Continue to Section 7.11 Running DSAT.</td> </tr> </tbody> </table>	IF...	THEN...	You want to import the selected file, export the ILR data and export the database, without using exporting DSAT option or Selecting Reports	Click on the Start button to activate the process.	You want to use the export DSAT option or choose Selected Reports prior to importing the selected file and exporting the ILR file and exporting the database	Continue to Section 7.11 Running DSAT.
IF...	THEN...						
You want to import the selected file, export the ILR data and export the database, without using exporting DSAT option or Selecting Reports	Click on the Start button to activate the process.						
You want to use the export DSAT option or choose Selected Reports prior to importing the selected file and exporting the ILR file and exporting the database	Continue to Section 7.11 Running DSAT.						
7	<p>Once the import/validate process is run you are able to view the data by opening the file from the directory selected in Step 4.</p>						

7. Importing and Validating ILR Data, Continued

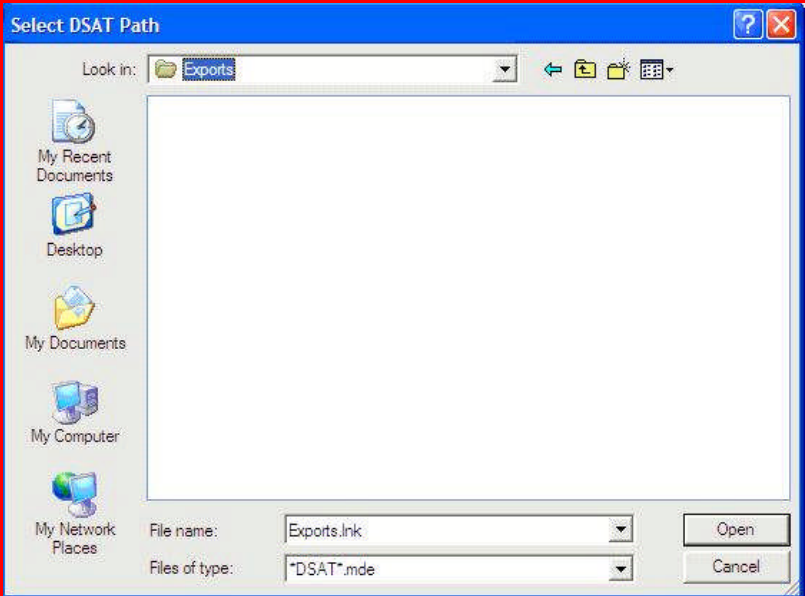

7.11 Running DSAT

When you export the LIS database as an Access database file you can automatically run DSAT (Data Self-assessment Toolkit) software to analyse the data and produce reports. You need to have the DSAT software installed before this operation will work.

For more information on the DSAT software refer to the DSAT page of the LSC website (www.lsc.gov.uk/providers/data/software/DSAT).

To run DSAT after exporting the LIS database, complete the following steps:

Step	Action						
1	<p>On the Batch Import screen click the DSAT checkbox.</p> <table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>This is the first time you are running the DSAT software</td> <td>The Change... button will activate. Go to step 3.</td> </tr> <tr> <td>You have previously run the DSAT software.</td> <td>The Change... button will activate and the file directory of the last DSAT export displays. Go to step 2.</td> </tr> </tbody> </table> <p>Note: This option is only available when the Export DB option is selected and the export DB Format is Access 97 (MDB).</p>	IF...	THEN...	This is the first time you are running the DSAT software	The Change... button will activate. Go to step 3 .	You have previously run the DSAT software.	The Change... button will activate and the file directory of the last DSAT export displays. Go to step 2 .
IF...	THEN...						
This is the first time you are running the DSAT software	The Change... button will activate. Go to step 3 .						
You have previously run the DSAT software.	The Change... button will activate and the file directory of the last DSAT export displays. Go to step 2 .						
2	<p>Check the file directory displayed:</p> <table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>You want to change the directory where LIS will look for the DSAT software</td> <td>Go to step 3.</td> </tr> <tr> <td>You want to use this directory</td> <td>Go to step 5.</td> </tr> </tbody> </table>	IF...	THEN...	You want to change the directory where LIS will look for the DSAT software	Go to step 3 .	You want to use this directory	Go to step 5 .
IF...	THEN...						
You want to change the directory where LIS will look for the DSAT software	Go to step 3 .						
You want to use this directory	Go to step 5 .						

Step	Action						
3	<p>Click Change...</p> <p>The Select DSAT Path window displays.</p> 						
4	<p>Use the explorer window to navigate to and select the directory where your DSAT export-to file is stored and click Open.. The naming convention of the DSAT export-to file is CaaTs (DSAT) v*.** (2000).mde.</p> <p>You will now be returned to the Batch Import screen. The DSAT field details the new location of the DSAT software.</p> <p>To close the Select Database Export Path window, without selecting a directory or changing the filename, click either Cancel or .</p>						
5	<p>At this stage:</p> <table border="1" data-bbox="549 1368 1310 1861"> <thead> <tr> <th data-bbox="549 1368 930 1413">IF...</th> <th data-bbox="930 1368 1310 1413">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="549 1413 930 1626">You want to import the selected file, export the ILR data, export the database and use the DSAT software, without Selecting Reports</td> <td data-bbox="930 1413 1310 1626">Click on the Start button to activate the process.</td> </tr> <tr> <td data-bbox="549 1626 930 1861">You want to choose Selected Reports prior to importing the selected file, exporting the ILR file, exporting the database and using the DSAT software</td> <td data-bbox="930 1626 1310 1861">Continue to Section 7.12 Select Reports.</td> </tr> </tbody> </table>	IF...	THEN...	You want to import the selected file, export the ILR data, export the database and use the DSAT software, without Selecting Reports	Click on the Start button to activate the process.	You want to choose Selected Reports prior to importing the selected file, exporting the ILR file, exporting the database and using the DSAT software	Continue to Section 7.12 Select Reports.
IF...	THEN...						
You want to import the selected file, export the ILR data, export the database and use the DSAT software, without Selecting Reports	Click on the Start button to activate the process.						
You want to choose Selected Reports prior to importing the selected file, exporting the ILR file, exporting the database and using the DSAT software	Continue to Section 7.12 Select Reports.						
6	<p>Once the Batch Import is complete DSAT will open automatically and load the exported LIS database.</p>						

7. Importing and Validating ILR Data, Continued

7.12 Select Reports

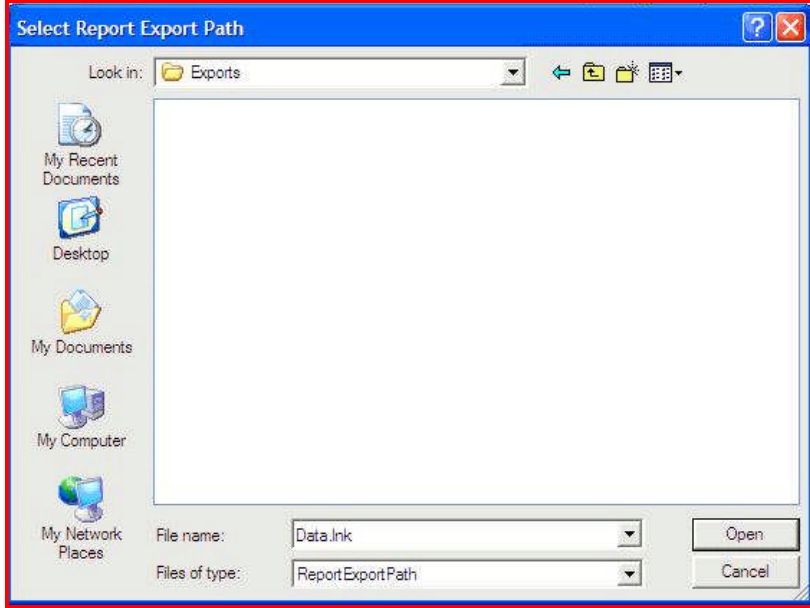

The Select Reports area of the Batch Import screen allows you to select up to four reports to be automatically produced when the batch process is run. Refer to Section 12 Running Reports (See page 56) for a list of available reports and their descriptions.

You can choose to print the reports or save them in one of several formats e.g. CSV, DBF, Excel, MDB or PDF.

Note: Reports run from the Batch Import with the Format drop down list set to 'Print', are output directly to your default printer. Because of the length of the reports that may be produced, it is recommended that you only print the Rule Violations Summary reports or fixed length reports, such as the Funding Claim Report, from the Batch Import screen.

To select which reports to produce, complete the following steps:

Step	Action								
1	On the Batch Import screen, click the drop down arrow next to the first of the Select Reports fields. The list of available reports displays.								
2	Click on the required report. The selected report displays in the Select Reports field.								
3	Repeat steps 1 and 2 for additional reports required (up to a maximum of four).								
4	Click the drop down arrow next to the Format field. The list of available formats displays.								
5	Click on the required format. <table border="1" data-bbox="560 1312 1291 1834"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>You select 'Print'</td> <td>The report(s) will be sent directly to the default printer. Go to step 9.</td> </tr> <tr> <td>This is the first time you have used a format that is not 'Print', e.g. CSV, DBF, Excel, MDB or PDF).</td> <td>Click the Change... button will activate. Go to step 7.</td> </tr> <tr> <td>You have previously used a format that is not 'Print', e.g. CSV, DBF, Excel, MDB or PDF).</td> <td>Click the Change... button will activate and the file directory of the last report location will be displayed. Go to step 6.</td> </tr> </tbody> </table>	IF...	THEN...	You select 'Print'	The report(s) will be sent directly to the default printer. Go to step 9.	This is the first time you have used a format that is not 'Print', e.g. CSV, DBF, Excel, MDB or PDF).	Click the Change... button will activate. Go to step 7.	You have previously used a format that is not 'Print', e.g. CSV, DBF, Excel, MDB or PDF).	Click the Change... button will activate and the file directory of the last report location will be displayed. Go to step 6.
IF...	THEN...								
You select 'Print'	The report(s) will be sent directly to the default printer. Go to step 9.								
This is the first time you have used a format that is not 'Print', e.g. CSV, DBF, Excel, MDB or PDF).	Click the Change... button will activate. Go to step 7.								
You have previously used a format that is not 'Print', e.g. CSV, DBF, Excel, MDB or PDF).	Click the Change... button will activate and the file directory of the last report location will be displayed. Go to step 6.								

Step	Action						
6	<p>Check the file directory displayed:</p> <table border="1" data-bbox="560 253 1289 506"> <thead> <tr> <th data-bbox="560 253 890 297">IF...</th> <th data-bbox="890 253 1289 297">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="560 297 890 439">You want to change the directory where the report download will be saved.</td> <td data-bbox="890 297 1289 439">Go to step 7.</td> </tr> <tr> <td data-bbox="560 439 890 506">You want to use the defaulted directory.</td> <td data-bbox="890 439 1289 506">Go to step 9.</td> </tr> </tbody> </table>	IF...	THEN...	You want to change the directory where the report download will be saved.	Go to step 7.	You want to use the defaulted directory.	Go to step 9.
IF...	THEN...						
You want to change the directory where the report download will be saved.	Go to step 7.						
You want to use the defaulted directory.	Go to step 9.						
7	<p>Click Change...</p> <p>The Select Report Export Path window displays.</p> 						
8	<p>Use the explorer window to navigate to and select the new directory for your report export, change the file name (if appropriate) and click Open.</p> <p>You will now be returned to the Batch Import screen. The report field details the new location of the report export.</p> <p>To close the Select Report Export Path window, without selecting a directory or changing the filename, click either Cancel or .</p>						
9	Click on the Start button to activate the report print / report export process.						
10	Once the report print / report export process is complete, you can retrieve your printout on your default printer / view the exported report by opening the file from the directory selected in step 5.						

7. Importing and Validating ILR Data, Continued

7.13 Saving Defaults

The **Save Defaults** button allows you to save the selections made on the Batch Import screen (and other screens where it appears e.g. Export ILR File).

If you wish to save your selections as defaults, click **Save Defaults**.

Note: You can overwrite default selections. The next time that you click **Save Defaults** it will overwrite existing defaults with the new selections.

7.14 Loading Defaults

The **Load Defaults** button allows you to recall previously saved defaults.

Click the **Load Defaults** button to recall the defaults. The Batch Import screen displays with defaults loaded.

7.15 Cancel the Import / Validate Process

Click the **Cancel** button to cancel the process at any time while it is running.

Note: Before the process is started, and after it has run, the button is deactivated.

7.16 What if the Import Process Aborts

The import process will fail if the file does not meet the requirements of the import validation rules, for example:

- The transmission number in the header does not match the transmission number in the filename.
- The provider number in the footer does not match the provider number in the filename.

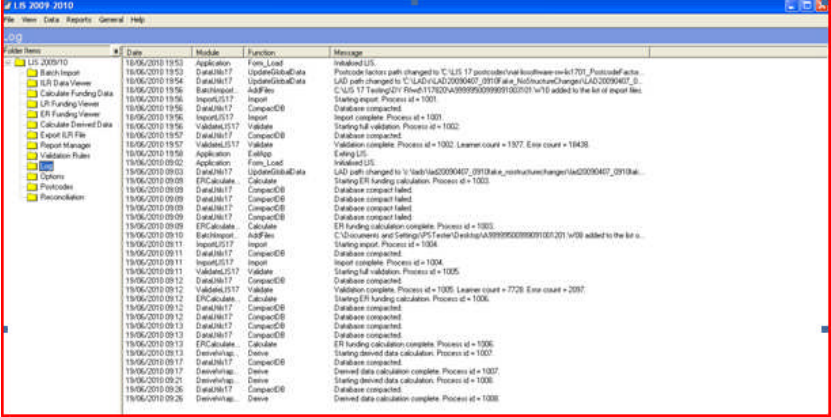
If you receive an import error dialogue box, complete the following steps:

Step	Action
1	Take a note of the error message and click OK . A second dialogue box displays explaining that the batch process has been aborted.
2	Click OK . You return to the Batch Import screen.
3	Use LIS reports to obtain details of the error. Refer to Section 12 Running Reports (See page 56).
4	Correct the error in your local MIS and import a new ILR data file. Refer to Section 7 Importing and Validating ILR Data (See page 30).

7. Importing and Validating ILR Data, Continued

7.17 Check the Results of the Selected Operations

Once you have run the process you are able to check the results of the operations you selected (if required).

Step	Action
1	<p data-bbox="544 488 852 521">Access the Log screen.</p>  <p data-bbox="544 972 1241 1005">The Log screen displays. This screen enables you to:</p> <ul data-bbox="544 1010 1305 1077" style="list-style-type: none"> view a log of all operations carried out by the software since the log was last cleared. <p data-bbox="544 1111 1378 1245">Operation details include: Date & Time, Module, Function and Messages, which are listed in ascending date order e.g. the most recent details are at the bottom of the list. Use the vertical scrollbar if required to view most recent results.</p> <p data-bbox="544 1279 1265 1312">Note: The Log is highlighted within the Navigation tree.</p>

8. Viewing ILR Data

8.1 Overview

Although you cannot amend any ILR data from within the LIS you can still view the data and search for learner information.

8.2 Viewing ILR Data





You can view the imported ILR data using the **ILR Data Viewer** screen within LIS.

To view imported data, complete the following step:

Step	Action
1	<p>Access the ILR Data Viewer screen.</p> <p>Note: No ILR data is visible at this stage (e.g. all fields are blank).</p> <p>Refer to:</p> <ul style="list-style-type: none">• Section 8.3 Listing All Learner Records (See below)• Section 8.4 Searching for Learner Records (See page 44).

8.3 Listing All Learner Records

To list all the learner records from the ILR Data Viewer screen, complete the following steps:

Step	Action
1	<p>Click on the All Records icon  to list all records.</p> <p>A list displays on the Learner Records tab. The list will show all imported ILR learner records for you to view.</p> <p>Note: If you have more than 100 learner records, only the first 100 will display. A message displays to advise you of this fact. Click on OK to proceed.</p> <p>You can move through the list using the active navigation buttons . Vertical and horizontal scroll bars are available if all the records are not visible, within each tab / sub tab.</p> <p>Note: When you are at the start or the end of the list some of the navigation buttons will be active or inactive accordingly, e.g.</p> <ul style="list-style-type: none">- at the start of the list, the buttons will be displayed as  (first & previous inactive / next & last active)- at the end of the list, the buttons will be displayed as  (first & previous active / next & last inactive) <p>You should search by surname or learner reference to return more specific results. Refer to Section 8.4 Searching for Learner Records (See page 44).</p>

Step	Action
2	<p data-bbox="544 215 906 241">Click on a learner in the list.</p> <p data-bbox="544 282 1377 412">You will be able to view the details for the selected learner in the header fields and tab sections of the ILR Data Viewer screen. Refer to Section 8.5 Viewing Learner Details (See page 45).</p> <p data-bbox="544 450 1326 544">Note: The position of the learner in the current result set will also be displayed within the ILR Data Viewer screen e.g. 00091 of 00100</p>

8. Viewing ILR Data, continued

8.4 Searching for Learner Records


You can search for specific imported ILR learner records if required. When using search within LIS you can use the following wildcards:

- * or % can be used to represent multiple characters and will enable you to search using partial information (See examples below)
- ? can be used to represent individual characters when searching using partial information (See examples below)

Note: The placement of the wildcards, can also affect the results returned
Examples:

- Dav*, could return the following surnames – **Davidoff**, **Davey**, **Davis** or **Davies**
- *oo*, could return the following surnames – **Cooper**, **Coogan**, **Windoo** or **Wood**
- B?ll, could return the following surnames – **Ball**, **Bell** or **Bull**
- B?ll*, could return the following surnames – **Balls**, **Bellway** or **Bullman**

To search for specific ILR learner records, complete the following steps:

Step	Action						
1	From the Enter Search Text area, use the drop down to select a search type as either Surname or Learner Ref.						
2	Enter a surname or learner reference into the Enter Search Text field, using wildcards if required.						
3	<p>Click  to start the search.</p> <table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>A match is found</td> <td>The result(s) will be shown in the Learner Records list. The search results will display the number of records matched and listed. The search is complete.</td> </tr> <tr> <td>No match is found</td> <td>An error message displays. Go to step 4.</td> </tr> </tbody> </table>	IF...	THEN...	A match is found	The result(s) will be shown in the Learner Records list. The search results will display the number of records matched and listed. The search is complete.	No match is found	An error message displays. Go to step 4.
IF...	THEN...						
A match is found	The result(s) will be shown in the Learner Records list. The search results will display the number of records matched and listed. The search is complete.						
No match is found	An error message displays. Go to step 4.						
4	Click OK and check your search text.						
5	Enter a valid search text using steps 1 and 2 to redefine the search criteria, and use step to 3 to start the search as detailed above.						

8.5 Viewing Learner Details

When a learner has been selected from the list, or by using the search facility, it is possible to view details for the learner, any associated learning aims and rule violations. This is done using the different tab sections of the ILR Data Viewer screen. There are two levels of 'tabs' and also a header section showing key information for the selected learner.

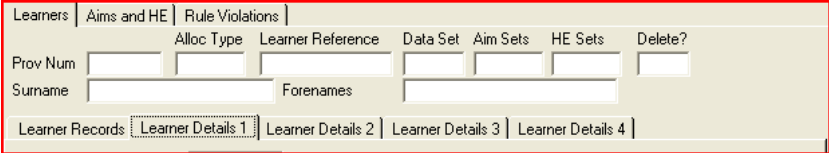
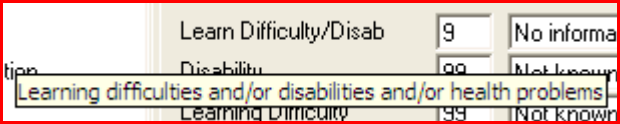
Note: For information about the ILR data fields and the validation rules applied by LIS, please refer to the ILR section of the LSC website at <http://www.theia.org.uk/downloads/ilrdocuments/>

Note: The position of the learner in the current result set will also be displayed within the ILR Data Viewer screen e.g. 00091 of 00100

To navigate around the ILR Data Viewer, complete the following steps:

8. Viewing ILR Data, Continued

8.5 Viewing Learner Details, continued

Step	Action						
1	<p>Click on one of the top level data tabs:</p>  <p>The options available are:</p> <ul style="list-style-type: none"> • Learners • Aims and HE • Rule Violations. <p>For each data field displayed, to see a description of the field move the mouse over the field label.</p>  <p>Once one of the tabs has been selected, a sub-set of tabs is available allowing more data to be viewed for the selected learner.</p>						
2	<table border="1"> <thead> <tr> <th data-bbox="560 1115 963 1167">IF...</th> <th data-bbox="963 1115 1362 1167">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="560 1167 963 1581"> <p>You click on the Learners tab:</p> </td> <td data-bbox="963 1167 1362 1581"> <p>The following options are available:</p> <ul style="list-style-type: none"> • Learner Records – a complete listing of the Learner’s ILR learner record <p>Summaries of ILR field data by field number:</p> <ul style="list-style-type: none"> • Learner Details 1 • Learner Details 2 • Learner Details 3 • Learner Details 4 </td> </tr> <tr> <td data-bbox="560 1581 963 2033"> <p>You click on the Aims and HE tab:</p> </td> <td data-bbox="963 1581 1362 2033"> <p>The following options are available:</p> <ul style="list-style-type: none"> • Aim/HE Records – a complete listing of the Learner’s ILR aim and HE records <p>Summaries of ILR field data by field number:</p> <ul style="list-style-type: none"> • Aim Details 1 • Aim Details 2 • Aim Details 3 • HE Details 1 • HE Details 2. </td> </tr> </tbody> </table>	IF...	THEN...	<p>You click on the Learners tab:</p>	<p>The following options are available:</p> <ul style="list-style-type: none"> • Learner Records – a complete listing of the Learner’s ILR learner record <p>Summaries of ILR field data by field number:</p> <ul style="list-style-type: none"> • Learner Details 1 • Learner Details 2 • Learner Details 3 • Learner Details 4 	<p>You click on the Aims and HE tab:</p>	<p>The following options are available:</p> <ul style="list-style-type: none"> • Aim/HE Records – a complete listing of the Learner’s ILR aim and HE records <p>Summaries of ILR field data by field number:</p> <ul style="list-style-type: none"> • Aim Details 1 • Aim Details 2 • Aim Details 3 • HE Details 1 • HE Details 2.
IF...	THEN...						
<p>You click on the Learners tab:</p>	<p>The following options are available:</p> <ul style="list-style-type: none"> • Learner Records – a complete listing of the Learner’s ILR learner record <p>Summaries of ILR field data by field number:</p> <ul style="list-style-type: none"> • Learner Details 1 • Learner Details 2 • Learner Details 3 • Learner Details 4 						
<p>You click on the Aims and HE tab:</p>	<p>The following options are available:</p> <ul style="list-style-type: none"> • Aim/HE Records – a complete listing of the Learner’s ILR aim and HE records <p>Summaries of ILR field data by field number:</p> <ul style="list-style-type: none"> • Aim Details 1 • Aim Details 2 • Aim Details 3 • HE Details 1 • HE Details 2. 						

<p>You click on the Rule Violations tab:</p>	<p>The Rule Violations screen displays, detailing the Validation rules that have been breached for the selected Learner record. The following details are displayed:</p> <ul style="list-style-type: none">• Name• Description• Funding• Warning• Rule Description• Field Values• Validation Expression
---	---

9. Calculating Funding Data

- 9.1 Overview** The funding calculations in the Learner Information Suite implement Demand Led Funding methodology, it allows:
- LR providers to calculate the LR funding generated by their ILR data, based upon their validated ILR returns (LIS 17.02 onwards)
 - ER providers to calculate the ER funding generated by their ILR data, based upon their validated ILR returns (LIS 17.01 onwards)
 - the LSC to use the same algorithms as providers to calculate ER and LR funding based on the ILR returns transmitted throughout the year.

You can run the funding calculations using either:

- Batch Import screen
- Calculate Funding Data screen.

The LR funding calculation option is not available for ASL, ESFSR or ER files.

The ER funding calculation option is not available for ASL, LR or UFI files.

Before calculating funding, ILR data must be imported and validated. The funding calculation module uses learners that pass the funding rule subset of the validation rules, regardless of the type of validation chosen.

To run the funding calculations from the Batch Import screen, Refer to Section 7.7 Select Operations (See page 29). Using the Calculate Funding Data screen detailed in Section 10.2 Calculating Funding.

Note: When calculating funding within LIS, ensure you are using the latest provider data tables. The provider data tables contain Provider UPINs, Provider names, Provider Factors, Additional Learning Support values, Long Term Residential Statuses. Provider data updates are available to download from the LSC website's LIS page. To update provider data tables using the downloaded file please refer to Updating your LIS Data (See page 76).

Differences in funding calculation results between LIS and Online Data Capture (OLDC) usually arise due to one of the following situations:

- Changes to the LAD between the live LAD (used by Online Data Capture) and the downloaded version linked to the local LIS.
- The version of the LIS being used locally is not the most recent for the teaching year.
- The LIS calculates funding for all learners who are funding rule valid. Provider Batch only calculates funding for fully valid learners.
- The ILR file run through LIS is different from the file sent to the portal.

9. Calculating Funding Data, Continued

9.2 Calculating Funding

To calculate funding, first import and validate your ILR data file, then complete the funding calculation, by following the steps listed below:

Step	Action
1	Access the Calculate Funding Data screen.
2	Click Calculate LR or Calculate ER. The LIS runs the funding calculation stages: <ul style="list-style-type: none">• Export learner and aim data• Export calculations, lookups and census dates• Calculate funding• Import calculation results• Import calculation variables• Import calculation errors Click Cancel to abort the calculation while it is in progress.
3	On successfully completing the calculations, a confirmation message displays. Click OK to acknowledge the message. The calculations are complete.

10. Deriving Data

10.1 Overview

LIS 17.01 contains the derived data calculations. Derived data (derived variables) are calculated for several reasons:

- They are used by the LIS in the preparation of reports and for the funding calculations.
- They allow consistency of definitions between local LSC offices and providers.
- Providers can use the derived variables for their own reporting purposes.

The derived data function can only be run if the funding calculation has preceded it. The Calculate Derived Data option on the batch import screen will only become active if 'Calculate LR Funding' or 'Calculate ER Funding' has already been selected.

Only valid learners are passed to this module. LR, UFI and ER learners can be validated against the funding subset of the validation rules. All other learner types must be fully validated.

10.2 Calculating Derived Data

To run the derived data calculations outside of the Batch Import process, complete the following steps:

Step	Action
1	Access the Calculate Derived Data screen. Click Derive Data to run the derived data calculation. Click Cancel to abort the calculation while it is in progress.
2	On successfully completing the calculations, a confirmation message displays Click OK to acknowledge the message. The calculations are complete.

11. Viewing Funding Data

11.1 Overview There are several ways to view the results of the funding calculation:





- Use either the LR Funding Viewer or ER Funding Viewer screens
- Run funding reports
- Examine the funding tables in an export of the LIS database.

There are various funding reports to choose from that show different summaries of funding data. They are described in Section 12 Running Reports (See page 56).

11.2 Listing All Funding Data

You can list the funding data for all imported learners.

To list all the data from either the LR Funding Viewer or ER Funding Viewer screens, complete the following steps:

Step	Action
1	<p>Access the LR Funding Viewer or ER Funding Viewer screen as appropriate</p> <p>A warning message will be displayed if you select the incorrect Funding Viewer for your imported learners.</p> <p>No learner data is visible at this stage.</p>
2	<p>Click on the All Records icon  to list all records.</p> <p>A list displays on the Learners Records tab. The list will show all imported ILR learner records for you to view.</p> <p>Note: If you have more than 100 learner records, only the first 100 will display. A message displays to advise you of this fact. Click on OK to proceed.</p> <p>You can move through the list using the active navigation buttons . Vertical and horizontal scroll bars are available if all the records are not visible, within each tab / sub tab.</p> <p>Note: When you are at the start or the end of the list some of the navigation buttons will be active or inactive accordingly, e.g. - at the start of the list, the buttons will be displayed as  (first & previous inactive / next & last active) - at the end of the list, the buttons will be displayed as  (first & previous active / next & last inactive)</p> <p>You should search by surname or learner reference to return more specific results. Refer to Section 8.4 Searching for Learner Records. (See page 44).</p>


Step	Action
3	<p data-bbox="520 210 887 239">Click on a learner in the list.</p> <p data-bbox="520 277 1366 376">You will be able to view the details for the selected learner in the header fields and tab sections of the Funding Viewer screen. Refer to Section 11.4 Viewing Funding Data (See page 54).</p> <p data-bbox="520 409 1374 483">Note: The position of the learner in the current result set will also be displayed within the ILR Data Viewer screen e.g. 00091 of 00100</p>

11.11. Viewing Funding Data, Continued

11.3 Searching for a Learner's Funding Data

You can search for funding data for a specific learner if required. When using search within LIS you can use wildcards. * will enable you to search using partial information. ? can be used to represent individual characters when searching using partial information. Refer to Section 8.4 Searching for Learner Records for more details regarding the use of wildcards (See page 44)

To search for the funding data for a specific learner, complete the following steps:

Step	Action						
1	From the Enter Search Text area, use the drop down to select a search type as either Surname or Learner Reference.						
2	Enter a surname or learner reference into the Enter Search Text field, using wildcards if required.						
3	<p>Click the  to start the search.</p> <table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>A match is found</td> <td> <p>The result(s) will be shown in the Learner Records list.</p> <p>The search results display the number of records matched and listed. The search is complete.</p> </td> </tr> <tr> <td>No match is found</td> <td> <p>An error message displays.</p> <p>Go to step 4.</p> </td> </tr> </tbody> </table>	IF...	THEN...	A match is found	<p>The result(s) will be shown in the Learner Records list.</p> <p>The search results display the number of records matched and listed. The search is complete.</p>	No match is found	<p>An error message displays.</p> <p>Go to step 4.</p>
IF...	THEN...						
A match is found	<p>The result(s) will be shown in the Learner Records list.</p> <p>The search results display the number of records matched and listed. The search is complete.</p>						
No match is found	<p>An error message displays.</p> <p>Go to step 4.</p>						
4	Click OK and check your search text.						
5	Enter a valid search text using steps 1 and 2 to redefine the search criteria, and use step to 3 to start the search as detailed above.						

11.4 Viewing Funding Data

The Funding Viewer screen has a series of tabs, with different sub-sets of data. The tabs available depend on which Funding Viewer is used (ER or LR). Key information is displayed in the header section. All information is read-only.

To navigate around the Funding Viewer screen, complete the following steps:

Step	Action										
1	Click on one of the tabs: <ul style="list-style-type: none"> • Learners • Aims • Lookups • SLN (within the LR Funding Viewer) / SLN Inst (within the ER Funding Viewer) • Cash • Calculation Variables • Errors 										
2	Once a tab has been selected, a further subset of tabs allows more data to be viewed. <table border="1" data-bbox="563 929 1386 1995"> <thead> <tr> <th data-bbox="563 929 911 976">IF...</th> <th data-bbox="911 929 1386 976">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="563 976 911 1115">You click on the Learners tab</td> <td data-bbox="911 976 1386 1115">A list of learner records is available. Data displayed by Learner Data Set field Reference Number</td> </tr> <tr> <td data-bbox="563 1115 911 1249">You click on the Aims tab</td> <td data-bbox="911 1115 1386 1249">Aim details for the selected learner are available. Data displayed by Learning Aim Data Set field Reference Number</td> </tr> <tr> <td data-bbox="563 1249 911 1352">You click on the Lookups tab</td> <td data-bbox="911 1249 1386 1352">Funding details from the LAD about the learning aims are available.</td> </tr> <tr> <td data-bbox="563 1352 911 1995">You click on the SLN tab – only available on the LR Funding Viewer</td> <td data-bbox="911 1352 1386 1995"> The following options are available: <ul style="list-style-type: none"> • Aim SLN (Inc E2E) tab: This shows the annualised SLN for the aim and the start period, in which it is awarded. • E2E Programme SLN tab: This shows the amount of SLN calculated by the LIS for each period of active learning. • E2E Bonus SLN tab: This shows the E2E Bonus SLNs generated by the learner's activity and the period(s) in which they occur. • Summary tab: This shows a sum of the previous three groups split by period. </td> </tr> </tbody> </table>	IF...	THEN...	You click on the Learners tab	A list of learner records is available. Data displayed by Learner Data Set field Reference Number	You click on the Aims tab	Aim details for the selected learner are available. Data displayed by Learning Aim Data Set field Reference Number	You click on the Lookups tab	Funding details from the LAD about the learning aims are available.	You click on the SLN tab – only available on the LR Funding Viewer	The following options are available: <ul style="list-style-type: none"> • Aim SLN (Inc E2E) tab: This shows the annualised SLN for the aim and the start period, in which it is awarded. • E2E Programme SLN tab: This shows the amount of SLN calculated by the LIS for each period of active learning. • E2E Bonus SLN tab: This shows the E2E Bonus SLNs generated by the learner's activity and the period(s) in which they occur. • Summary tab: This shows a sum of the previous three groups split by period.
IF...	THEN...										
You click on the Learners tab	A list of learner records is available. Data displayed by Learner Data Set field Reference Number										
You click on the Aims tab	Aim details for the selected learner are available. Data displayed by Learning Aim Data Set field Reference Number										
You click on the Lookups tab	Funding details from the LAD about the learning aims are available.										
You click on the SLN tab – only available on the LR Funding Viewer	The following options are available: <ul style="list-style-type: none"> • Aim SLN (Inc E2E) tab: This shows the annualised SLN for the aim and the start period, in which it is awarded. • E2E Programme SLN tab: This shows the amount of SLN calculated by the LIS for each period of active learning. • E2E Bonus SLN tab: This shows the E2E Bonus SLNs generated by the learner's activity and the period(s) in which they occur. • Summary tab: This shows a sum of the previous three groups split by period. 										

<p>You click on the SLN Inst tab – only available on the ER Funding Viewer</p>	<ul style="list-style-type: none"> • On Programme SLN Inst tab: This is the amount of SLN calculated by the LIS in instalments for each period of active learning. • Achievement SLN Inst tab: This shows the Achievement SLN and the period in which it is awarded. • Balancing SLN Inst tab: When a learner achieves before the planned end date then a remaining balance of on-programme SLN instalments still need to be awarded. This tab shows details that where it exists. • Totals tab: This shows a sum of the previous three groups spilt and summed by period.
<p>You click on the Cash tab in the LR Funding Viewer</p>	<p>The following values are shown in a table arranging aim values and with totals by period:</p> <ul style="list-style-type: none"> • Programme Cash (£). • ALS (£). • Totals (£).
<p>You click on the Cash tab in the ER Funding Viewer</p>	<p>The following values are shown in a table arranging aim values and with totals by period:</p> <ul style="list-style-type: none"> • On Programme (£). • Achievement (£). • Balancing (£). • ALS (£). • Totals (£)
<p>You click on the Calculation Variables tab</p>	<p>This screen shows the steps in the funding calculation for the learner selected. It displays the following LIS mdb fields:</p> <ul style="list-style-type: none"> • LRFundingAim table (within the LR Funding Viewer screen) • ERFundingAim table (within the ER Funding Viewer screen)
<p>You click on the Errors tab</p>	<p>This screen shows any Rule Violations or Funding Calculation Errors for the learner selected.</p>

12. Running Reports

12.1 Overview You can run reports from the:

- Batch Import screen
- Report Manager screen.

This section details the reports that are either currently published in Release 1 and those that are planned to be published within the next release of the LIS (Release2).

For running reports from the Batch Import screen refer to Section 7.12 Select Reports (See page 38).

The Batch Import screen will output reports directly to a printer or export as a file e.g. CSV, DBF, Excel, MDB or PDF. Whereas the Report Manager screen will output to a window for viewing, printing or exporting to either Excel or PDF format.

12.2 Available Standard Reports – Validation

The following validation reports are available for all collection types, and can be both run and exported from within the LIS.

Ref	Report Name	Report Description
1	Rule Violations	Lists any ILR rule violations produced during the validation process.
2	Rule Violations by LSC	Lists any ILR rule violations produced during the validation process, grouped by local LSC (LLSC).
3	Rule Violations Summary	Outputs, for each validation error generated during the validation process, a count of the number of instances found in the ILR data.
4	Rule Violations Summary by LSC	Outputs, for each validation error generated during the validation process, a count of the number of instances found in the ILR data, grouped by local LSC (LLSC).
5	Full ILR Validation Rules	Lists all ILR validation rules used by the LIS.

The first four violations reports include a summary box which details the total number of data records, the total number of invalid and valid learners according to rule type (full or co-funding-only) and a count of the aims for each funding stream value. (This count is based on ILR field A10.)

12.3 Available Standard Reports – ER Funding

The following reports are only available for the ER collection type, and can be both run and exported from within the LIS.

Ref	Report Name	Report Description
12	Summary of ER DLF in File	Shows a summary of the Employer Responsive funding generated by an imported ILR file. Outputs the total funding for a provider classified by period and category

Continued on next page

12.4 Available Export Only Reports

In Report Manager, the following reports are available but are only available to be exported from within the LIS.

Ref	Report Name	Report Description
18	ER Learner Export	Export shows, for every learner, key variables for funding and categorisation of Employer Responsive provision.
19	ER Aim Export	Export shows, for every aim, key variables for funding and categorisation of Employer Responsive provision.

The content of these exports depends on the collection type of the imported data. All collection types except ESF SR have both learner and aim exports.

12.5 Selecting and Running a Report

The Report Manager enables you to select, run, print and export available reports.

You can only run a single report at a time from Report Manager. If you would like to run multiple reports simultaneously you should use the Batch Import screen. Refer to Section 7.12 Select Reports (See page 38).

To use Report Manager to select and run a report, complete the following steps:

Step	Action
1	Access the Report Manager screen.
2	<p>From within the Available Reports section of the screen, select the report you require from those listed, by clicking on the relevant row. Upon selection the report will be highlighted.</p> <p>Note: Within the Filters section of the screen, a selection of available filters will be displayed. The filters displayed will vary dependant upon the report selected.</p> <p>For more details on filters, see Section 12.8 Using Filters in Reports (See page 61).</p>

3

Click on the **Run Report** button. The report output displays in a print preview window.

The toolbar at the top of the report window enables you to:

- Zoom the view and navigate through the report pages.
- Print or export the report output.



Refer to:

- Section 12.12 Printing a Report (See page 63)
- Section 12.13 Exporting a Report (See page 65).

12. Running Reports, Continued

12.6 Using Filters in Reports

Filters are used to restrict the amount of data returned in the report. They are used when you are interested in a specific record or group of records. The filters vary for each report and are displayed when a report is highlighted in the list.

There are no limitations on the number of filters you can use per report, e.g. you can use no filters or any combination of the available filters.

The only exception to this rule is the Learner Reference filter, which is mandatory when running either the LR ILR Form Report or the ER ILR Form Report.

However, the values used should be valid or your report output will be affected. It is useful to use filters when reporting on large sets of data.

You may use wildcards (*, % or ?) when populating filter fields. Refer to Section 8.4 Searching for Learner Records for more details regarding the use of wildcards (See page 44)

Note: Filtered reports can also be run using the print icon from the ILR Data Viewer screen, which will pre-populate the relevant filters in the Report Manager screen with the information for the selected learner.

12.7 Available Filters for Reports

There are a number of filters available for use when running reports. The filters vary from report to report. The following table shows a list of reports which don't use filters, and which filters are available for each those that do:

Report Ref	Report Name	Available Filters													
		No Filters Available	Learner Reference	Rule Name	Funding Rule	Warning	Provider Specified Learner Data (1)	Provider Specified Learner Data(2)	Provider Specified Aim Data (1)	Provider Specified Aim Data (2)	Error Code	Learning Aim Reference	Period	LLSC Number	Name
1	Rule Violations		●	●	●	●	●	●	●	●					
2	Rule Violations by LSC		●	●	●	●	●	●	●						
3	Rule Violations Summary				●	●									
4	Rule Violations Summary by LSC				●	●									
5	Full ILR Validation Rules				●	●									●
12	Summary of ER DLF in File	●													
19	ER Learner Export	●													
20	ER Aim Export	●													

12. Running Reports, Continued

12.8 Recommended Field Values for Filtering

The following table describes the valid values you can use for each of the filter fields in the reports:

Filter Name	Acceptable Value
Learner Reference	Uses the full Learner Reference Number or a partial Learner Reference Number when using a wildcard
Rule Name	Uses the full Rule Name listed on the Validation Rules screen (Refer to Section 15.2 Listing All Validation Rules, page 69), or a partial Rule Name when using a wildcard
Funding Rule	Can use either Y or N depending upon if you are filtering for an FE funding rule or not. Y returns results where the rule is a funding rule; N returns results where the rule is not a funding rule.
Warning	Can use either Y (for warnings) or N (for errors).
Provider Specified Learner Data (1)	Uses a reference number or part of one. (Refer to the ILR Field Specification document, which describes the use of this field, L42.)
Provider Specified Learner Data (2)	Uses a reference number or part of one. (Refer to the ILR Field Specification document, which describes the use of this field, L42.)
Provider Specified Aim Data (1)	Uses a reference number or part of one. (Refer to the ILR Field Specification document, which describes the use of this field, A48.)
Provider Specified Aim Data (2)	Uses a reference number or part of one. (Refer to the ILR Field Specification document, which describes the use of this field, A48.)
Period	Period 1 to 12, where August = Period 1, September = period 2; etc.
Error code	Calculation error code.
Learning Aim Reference	Uses the full Learner Aim Reference or a partial Learner Aim Reference when using a wildcard
LLSC Number	The LSC number associated with the learner in ILR field L25.
Name	The validation rule name, allows specific validation rules to be selected for the report.

12. Running Reports, Continued

12.9 Running Filtered Reports

To use filters in your report, complete the following steps:

Step	Action
1	Access the Report Manager screen.
2	Select the required report from the Available Reports list.
3	If you want to remove all values entered in the filter fields of the report, click the Clear Filters button.
4	Against your required filter, enter a valid value in the filter field. Repeat for as many filters as required.
5	Click the Run Report button. The report output displays in a print preview window. The report output can now be printed or exported. Refer to Section 12.12 Printing a Report (See page 63) or Section 12.13 Exporting a Report (See page 65) for further details.

12.10 Printing a Report

You can print reports using:


- Batch Import screen
- Report Manager.

When you choose to print reports from the Batch Import screen, the report output is sent direct to the default printer. This should be used with caution as some reports are several hundred pages long.

When using Report Manager, the report output displays on screen first and then you can send the report to print if required.

Reports can also be exported and printed using another application. Exported reports can be saved for printing at a later date. Refer to Section 12.13 Exporting a Report (See page 65)

Refer to Section 7.12 Select Reports (See page 38) to print reports from the Batch Import screen. The following steps describe how to print your report from within Report Manager screen.

Step	Action
1	From within the Report Manager screen , select a report, set any required filters and click the Run Report button. The report output displays in the print preview window.
2	Click Print  from the top of the report output window. The Print dialogue box displays. Select the printer, the print range for the number of pages to print, and the number of copies required and ensure the collate copies option is correctly set, if available.

Step	Action
3	Click OK . The report output is printed at the chosen printer. Click Cancel to close the print dialogue box and not print the output.



12. Running Reports, Continued


12.11 Exporting a Report

It is possible to export report outputs to a variety of formats, depending on the method used.

Refer to Section 7.12 Select Reports (See page 38) to export reports from the Batch Import screen.

The following steps describe how to export your report from within Report Manager screen:

Step	Action						
1	From within the Report Manager screen, select a report, and set any required filters						
2	<table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>You wish to export your report in either Excel or PDF formats</td> <td>Go to Step 3.</td> </tr> <tr> <td>You wish to export your report in either csv, dbf or mdb formats</td> <td>Go to Step 7.</td> </tr> </tbody> </table>	IF...	THEN...	You wish to export your report in either Excel or PDF formats	Go to Step 3.	You wish to export your report in either csv, dbf or mdb formats	Go to Step 7.
IF...	THEN...						
You wish to export your report in either Excel or PDF formats	Go to Step 3.						
You wish to export your report in either csv, dbf or mdb formats	Go to Step 7.						
3	Click the Run Report button, and the report output displays in the print preview window.						
4	Click Export  from the top of the report output window. The Export dialogue box appears.						
5	Select either the Excel or PDF format from the drop down list. The Save As windows displays.						
6	<p>If appropriate, use the explorer window to navigate to, and select a new directory location for your report export. Change the file name, as required.</p> <p>To close the Save As window, without selecting a directory location or changing the filename, click either Cancel or .</p> <p>Click Save, and you will now be returned to the report output screen. Go to Step 10.</p>						
7	<p>Click the Export button.</p> <p>The Export Options dialogue box displays.</p>						
8	<p>If appropriate, use the explorer window to navigate to, and select a new directory location for your report export. Change the file name, as required.</p> <p>You should also select the format of the exported report, using the drop down list. Available formats are csv, dbf and mdb.</p>						

Step	Action
9	<p>Click Save.</p> <p>To close the Export window, without selecting a directory or changing the filename, click either Cancel or . A message is displayed stating the export has been cancelled.</p>
10	<p>The report will be exported to the specified location. You can view the report from that location by accessing the exported report file using Windows Explorer or an appropriate application.</p>

13. Exporting ILR Data

13.1 Overview

This facility exports the ILR data ready for transmission to the LSC using the Provider Batch capture process.

To export your ILR data from LIS you can use the:

- Batch Import screen
- Export ILR File screen.

Note: The Export ILR file feature will export valid ILR data **ONLY**. Invalid records **WILL NOT** be exported. The export file may not be a reflection of the originally imported ILR data file.

It is therefore important that you **ONLY** export the ILR data when all errors have been corrected and the file has been fully validated through the LIS.

The Batch Import screen allows you to select an operation to export validated ILR data as part of the import/validate process, or separately. Refer to Section 7.9 the Export ILR (See page 32).

13.2 Exporting ILR Data using ILR Export

You can export ILR data using the **Export ILR File** screen.


The user can choose the export file path.

To export ILR data using the Export ILR File screen, complete the following steps:

Step	Action
1	Access the Export ILR File screen. The fields on this screen are mainly read-only. They are populated with information from the imported file.
2	You may choose to change the Data Type by selecting one of the radio buttons e.g. Live or Test. This will be set by default from the imported data file.

Continued on next page

13. Exporting ILR Data, Continued

Step	Action								
3	<table border="1"> <thead> <tr> <th data-bbox="568 360 962 405">IF...</th> <th data-bbox="962 360 1362 405">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="568 405 962 477">This is the first time you are exporting an ILR file</td> <td data-bbox="962 405 1362 477">The Export Area path will be blank. Go to step 5.</td> </tr> <tr> <td data-bbox="568 477 962 611">You have previously exported an ILR file</td> <td data-bbox="962 477 1362 611">The Export Area path will be populated with your last export location. Go to step 4.</td> </tr> </tbody> </table>	IF...	THEN...	This is the first time you are exporting an ILR file	The Export Area path will be blank. Go to step 5 .	You have previously exported an ILR file	The Export Area path will be populated with your last export location. Go to step 4 .		
IF...	THEN...								
This is the first time you are exporting an ILR file	The Export Area path will be blank. Go to step 5 .								
You have previously exported an ILR file	The Export Area path will be populated with your last export location. Go to step 4 .								
4	<table border="1"> <thead> <tr> <th data-bbox="568 701 962 745">IF...</th> <th data-bbox="962 701 1362 745">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="568 745 962 853">If you want to use the location within the Export Area path.</td> <td data-bbox="962 745 1362 853">Go to step 7.</td> </tr> <tr> <td data-bbox="568 853 962 960">If you want to change the directory location within the Export Area path.</td> <td data-bbox="962 853 1362 960">Go to step 5.</td> </tr> </tbody> </table>	IF...	THEN...	If you want to use the location within the Export Area path.	Go to step 7 .	If you want to change the directory location within the Export Area path.	Go to step 5 .		
IF...	THEN...								
If you want to use the location within the Export Area path.	Go to step 7 .								
If you want to change the directory location within the Export Area path.	Go to step 5 .								
5	<p>Click the Change... button</p> <p>The Select Export File Path window displays.</p>								
6	<p>Use the explorer window to navigate to your required export location. Select an Export Area path, change the file name (if appropriate) and click Open.</p> <p>To close the Export window, without selecting a directory or changing the filename, click either Cancel or .</p>								
7	<table border="1"> <thead> <tr> <th data-bbox="568 1359 962 1404">IF...</th> <th data-bbox="962 1359 1362 1404">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="568 1404 962 1547">You would like to run the report showing funding included and excluded by the export</td> <td data-bbox="962 1404 1362 1547">Click the Run report showing funding included and excluded by ILR export check box.</td> </tr> <tr> <td data-bbox="568 1547 962 1619">You would like to load defaults</td> <td data-bbox="962 1547 1362 1619">Click the Load defaults button.</td> </tr> <tr> <td data-bbox="568 1619 962 1691">You would like to save defaults</td> <td data-bbox="962 1619 1362 1691">Click the Save defaults button.</td> </tr> </tbody> </table>	IF...	THEN...	You would like to run the report showing funding included and excluded by the export	Click the Run report showing funding included and excluded by ILR export check box.	You would like to load defaults	Click the Load defaults button.	You would like to save defaults	Click the Save defaults button.
IF...	THEN...								
You would like to run the report showing funding included and excluded by the export	Click the Run report showing funding included and excluded by ILR export check box.								
You would like to load defaults	Click the Load defaults button.								
You would like to save defaults	Click the Save defaults button.								
8	<p>Click on the Export button.</p> <p>The export begins and a confirmation prompt appears.</p>								

14. Validation Rules

14.1 Overview

LIS uses a set of validation rules, in conjunction with the LAD and other lookup data, to validate the imported ILR data. Using LIS series 17, your ILR data will be validated against a version of the 2009/10 validation rules.

You can find out which version of the validation rules are used (Refer Section 16.9 Viewing Version Information (See page 77)).

For details about the validation rules and the amendments since previous releases, please refer to the ILR pages of the Information Authority website: <http://www.theia.org.uk/downloads/ilrdocuments/>

14.2 Listing all Validation Rules

It is possible to list all the validation rules applied by the LIS by accessing the **Validation Rules** screen.


To list all the validation rules, complete the following steps:

Step	Action
1	Access the Validation Rules screen.
2	Use the scroll bar to move up and down the list and view the rules.

14.3 Viewing Validation Rule Properties

You can view additional information for each validation rule listed in the Validation Rules screen.

To view properties for a selected validation rule, complete the following steps:

Step	Action
1	Scroll the list to find the rule you are searching for and double click the rule. The Validation Rule Properties dialogue box displays, detailing the following fields: <ul style="list-style-type: none">• Rule ID• Rule Name• Description• Expression
2	Once you are finished, click Cancel or  The dialogue box closes and returns to the Validation Rules screen.

14.4 Reports showing Full ILR Validation Rules

You can view a list of all the ILR validation rules by running the **Full ILR Validation Rules** report, which lists the validation rules currently in the LIS. To run this report, follow the procedure described in Section 12 Running Reports (See page 56).



16. Maintaining LIS Options

15.1 Overview

There are several options which may need to be viewed and/or maintained from within the LIS. These options are accessed from the **Options** screen, and are displayed as the following four tabs:

- Status Information
 - Maintenance
 - Import Errors
 - Version Information
-

15.2 Viewing Status Information

You can view status information for the data you have imported into LIS, by completing the following steps:

Step	Action
1	<p>Access the Options screen. Click on the Status Information tab if this is not displayed by default.</p> <p>From within the Status Information tab, data for the following fields can be viewed:</p> <ul style="list-style-type: none">• Process ID• Module• Version (of LIS)• LAD Version• Status• Time Start• Time End• CAPN• Import Process ID• Count – details a count of records imported for a specific datasets listed below• Source – details a list of data sets imported, including:<ul style="list-style-type: none">• Total Learners imported• Fully Validated Learners• Learners with warnings only• Programme Aims• Aims• HE Datasets• Rule Violations <p>Navigate through the Status Information tab, using the scroll bars available.</p>
2	<p>If you want to see a list of processes that have taken place, click the Show History check box at the bottom of the screen.</p> <p>The history information displays, within the Status Information tab for the selected Provider.</p>

Continued on next page

15. Maintaining LIS Options, Continued

15.3 Maintenance Options

The Maintenance tab within Options allows you to carry out some maintenance tasks within LIS, complete the following steps:

Step	Action														
1	<p>Access the Options screen. Click the Maintenance tab.</p> <p>The Maintenance tab offers the following options:</p> <ul style="list-style-type: none"> • Provider Selection • Truncate Log • Clear Locks • Compact DB • Update Data. • Postcode Factors 														
2	<p>Click on a button to conduct a specific operation.</p> <table border="1" data-bbox="560 808 1358 1675"> <thead> <tr> <th data-bbox="560 808 959 853">IF...</th> <th data-bbox="959 808 1358 853">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="560 853 959 987">You wish to change your provider</td> <td data-bbox="959 853 1358 987">Click on the Provider... button. Go to Section 7.3 Change the Provider (See page 25).</td> </tr> <tr> <td data-bbox="560 987 959 1122">You wish to truncate the log file</td> <td data-bbox="959 987 1358 1122">Click on the Truncate Log button. Go to Section 15.4 Truncating the Log (See page 73).</td> </tr> <tr> <td data-bbox="560 1122 959 1256">You wish to clear locks</td> <td data-bbox="959 1122 1358 1256">Click on the Clear Locks button. Go to Section 15.5 Clearing Locks (See page 74).</td> </tr> <tr> <td data-bbox="560 1256 959 1391">You wish to compact the database</td> <td data-bbox="959 1256 1358 1391">Click on the Compact DB button. Go to Section 15.6 Compacting your Database (See page 75).</td> </tr> <tr> <td data-bbox="560 1391 959 1525">You wish to update the data used by LIS</td> <td data-bbox="959 1391 1358 1525">Click on the Update Data button. Go to Section 15.7 Updating your LIS Data (See page 76).</td> </tr> <tr> <td data-bbox="560 1525 959 1659">You wish to update the Postcode Factors used by LIS</td> <td data-bbox="959 1525 1358 1659">Click on the Change button. Go to Section 15.8 Updating your Postcode Factors (See page 76).</td> </tr> </tbody> </table>	IF...	THEN...	You wish to change your provider	Click on the Provider... button. Go to Section 7.3 Change the Provider (See page 25).	You wish to truncate the log file	Click on the Truncate Log button. Go to Section 15.4 Truncating the Log (See page 73).	You wish to clear locks	Click on the Clear Locks button. Go to Section 15.5 Clearing Locks (See page 74).	You wish to compact the database	Click on the Compact DB button. Go to Section 15.6 Compacting your Database (See page 75).	You wish to update the data used by LIS	Click on the Update Data button. Go to Section 15.7 Updating your LIS Data (See page 76).	You wish to update the Postcode Factors used by LIS	Click on the Change button. Go to Section 15.8 Updating your Postcode Factors (See page 76).
IF...	THEN...														
You wish to change your provider	Click on the Provider... button. Go to Section 7.3 Change the Provider (See page 25).														
You wish to truncate the log file	Click on the Truncate Log button. Go to Section 15.4 Truncating the Log (See page 73).														
You wish to clear locks	Click on the Clear Locks button. Go to Section 15.5 Clearing Locks (See page 74).														
You wish to compact the database	Click on the Compact DB button. Go to Section 15.6 Compacting your Database (See page 75).														
You wish to update the data used by LIS	Click on the Update Data button. Go to Section 15.7 Updating your LIS Data (See page 76).														
You wish to update the Postcode Factors used by LIS	Click on the Change button. Go to Section 15.8 Updating your Postcode Factors (See page 76).														

Continued on next page

15. Maintaining LIS Options, Continued

15.4 Truncating the Log

The LIS application keeps a log of some of the events or operations carried out. Refer to Section 17.2 Viewing the Audit Log for more information (See page 80). The log file is useful for diagnosing problems, but it can be truncated if required. Truncating the log erases all the log entries and is useful if you wish to save hard disk space.

To truncate the log, follow the steps listed below:

Step	Action						
1	Access the Options screen. Select the Maintenance tab. Click on the Truncate Log button. The following warning message is displayed “Ok to truncate the log file? This action is not reversible”.						
2	Select an option: <table border="1"><thead><tr><th>IF...</th><th>THEN...</th></tr></thead><tbody><tr><td>You click Yes</td><td>A confirmation message displays. The truncation is complete. Go to step 3.</td></tr><tr><td>You click No</td><td>You return to the Maintenance tab and no truncation has taken place.</td></tr></tbody></table>	IF...	THEN...	You click Yes	A confirmation message displays. The truncation is complete. Go to step 3 .	You click No	You return to the Maintenance tab and no truncation has taken place.
IF...	THEN...						
You click Yes	A confirmation message displays. The truncation is complete. Go to step 3 .						
You click No	You return to the Maintenance tab and no truncation has taken place.						
3	Click OK . You return to the Maintenance tab.						

Continued on next page

15. Maintaining LIS Options, Continued

15.5 Clearing Locks

Locks will occur within LIS if processes remain incomplete, for example if your PC is switched off during an import. Error messages will prevent you from completing some operations.

If this occurs then the Clear Locks option should be used:

Step	Action						
1	Access the Options . Select the Maintenance tab. Click on the Clear Locks button. The following warning message is displayed "Ok to clear process control locks? This action is not reversible".						
2	Select an option <table border="1"><thead><tr><th>IF...</th><th>THEN...</th></tr></thead><tbody><tr><td>You click Yes</td><td>A confirmation message displays. Go to step 3.</td></tr><tr><td>You click No</td><td>You return to the Maintenance tab screen and no locks have been cleared.</td></tr></tbody></table>	IF...	THEN...	You click Yes	A confirmation message displays. Go to step 3 .	You click No	You return to the Maintenance tab screen and no locks have been cleared.
IF...	THEN...						
You click Yes	A confirmation message displays. Go to step 3 .						
You click No	You return to the Maintenance tab screen and no locks have been cleared.						
3	Click OK . You return to the Maintenance tab screen.						

Continued on next page

15. Maintaining LIS Options, Continued

15.6 Compacting your Database

You can compact the database within LIS, to save hard disk space. However, the LIS performs self-compaction after validation so this option is generally only useful for providers with exceptionally large files.

To compact the database, complete the following steps:

Step	Action						
1	Access the Options screen. Select the Maintenance tab. Click on the Compact DB button. The following warning message is displayed “Are you sure you wish to compact the database?”.						
2	Select an option. <table border="1"><thead><tr><th>IF...</th><th>THEN...</th></tr></thead><tbody><tr><td>You click Yes</td><td>A confirmation message displays. Go to step 3.</td></tr><tr><td>You click No</td><td>You return to the Maintenance tab screen and the database has not compacted.</td></tr></tbody></table>	IF...	THEN...	You click Yes	A confirmation message displays. Go to step 3 .	You click No	You return to the Maintenance tab screen and the database has not compacted.
IF...	THEN...						
You click Yes	A confirmation message displays. Go to step 3 .						
You click No	You return to the Maintenance tab screen and the database has not compacted.						
3	Click OK . You return to the Maintenance tab.						


Continued on next page

15. Maintaining LIS Options, Continued

15.7 Updating your LIS Data

You can update static data used by the LIS, for example the Provider list or Postcode list . You will only need to do this when an update is released on the LIS pages of the LSC website.


To update your LIS data, follow the steps below:

Step	Action
1	Download the updated data file from the LIS pages of the LSC website to your PC.
2	Access the Options screen. Select the Maintenance tab. Click on the Update Data button.
3	The Select Lookups Update File dialogue box displays. Navigate through the directory and select your data file for updating LIS.
4	Click Open . The selected file updates data within LIS. To close the Select Lookups Update File window, without selecting a directory or changing the filename, click either Cancel or  . You then return to the Maintenance tab.

15.8 Updating your Postcode Factors

You can update static Postcode Factors data used by the LIS. You will only need to do this when an update is released on the LIS pages of the LSC website.

Use the following steps to update your LIS data:

Step	Action
1	Download the updated data file from the LIS pages of the LSC website to your PC.
2	Access the Options screen. Select the Maintenance tab. Click on the Change button.
3	The Select Postcode Factors Database Path dialogue box displays. Navigate through the directory and select your data file for updating LIS.
4	Click Open . The selected file updates data within LIS. To close the Select Postcode Factors Database Path window, without selecting a directory or changing the filename, click either Cancel or  . You then return to the Maintenance tab, with the file location path, Area Cost Factors and Disadvantage Factors details showing as being updated.

15.9 Viewing Import Errors

You can view a list of import errors that may be encountered when importing ILR data into LIS, complete the following steps:

Step	Action
1	Access the Options screen. Select the Import Errors tab.
2	The import errors tab screen displays, showing details for error <ul style="list-style-type: none">• Name• Description• Field Values Click on an error in the list for more details.

15.10 Viewing Version Information

You may need to know which version of the LIS and the LAD you are using. For example, this information is useful when updating software, maintaining data and requesting support.

To view version information from within the LIS application, complete the following steps:

Step	Action
1	Access the Options screen. Click the Version Information tab. The version information tab screen displays. It is read only and shows version information for: <ul style="list-style-type: none">• Learner Information Suite<ul style="list-style-type: none">○ Database○ Application○ Validation Rules• Learning Aim Database<ul style="list-style-type: none">○ Version• Modules<ul style="list-style-type: none">○ LR Funding calculation○ ER Funding calculation○ DLF Common○ Derived Data Collection• Lookup Tables<ul style="list-style-type: none">○ Providers○ Postcodes○ TtG Brokers Contracts○ Postcode Area Cost Factors○ Postcode Disadvantage Factors

Continued on next page



15. Maintaining LIS Options, Continued

15.11 Maintaining Postcodes

Postcodes can be maintained from within LIS. You can search for existing postcodes or insert new postcodes into the list.

15.12 Searching for Postcodes

To search for postcodes, complete the following steps:

Step	Action						
1	<p>Access the Postcodes screen.</p> <p>The list shows all postcode records for you to view. Move through the list using the scroll bar or the navigation buttons .</p>						
2	<p>If you click the drop down next to the search button  you have two options:</p> <table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>You click All Records</td> <td>The list is refreshed to display all postcode records within LIS.</td> </tr> <tr> <td>You click Some Records.</td> <td>The Select Filter Required dialogue box displays. Go to step 3.</td> </tr> </tbody> </table>	IF...	THEN...	You click All Records	The list is refreshed to display all postcode records within LIS.	You click Some Records.	The Select Filter Required dialogue box displays. Go to step 3 .
IF...	THEN...						
You click All Records	The list is refreshed to display all postcode records within LIS.						
You click Some Records.	The Select Filter Required dialogue box displays. Go to step 3 .						
3	<p>Click on the drop down for Data Field to select a category for your search.</p> <p>Three Filter options are available:</p> <ul style="list-style-type: none"> • Council entered • Description • Outward Postcode. 						
4	<p>Enter a value in the Filter field.</p> <p>Note: wildcard characters are NOT allowed.</p>						
5	<p>Click on the Filter button. Your search results display.</p> <p>Cancel will cancel the search.</p>						
6	<p>Upon selecting a Postcode, the current PostCode Detail and position in current result set fields are updated as appropriate</p>						



Continued on next page

15. Maintaining LIS Options, Continued

15.13 Inserting New Postcodes

It is possible to insert new postcodes into the list within LIS.


To insert new postcodes, complete the following steps:

Step	Action
1	Click Insert  The current PostCode Detail section of the screen is populated with blank fields. The Postcode screen displays.
2	Enter the Outward Postcode in the field.
3	Enter a Description for the postcode. Note: The inserted postcode defaults Council Entered to N. The entry displays at the end of the existing list.
4	Click Save Changes  Click Discard to abort the insertion of the new postcode. The new postcode is inserted into the list. The list is sorted by Outward Postcode when it is saved.

15.14 Deleting Postcodes

It is possible to delete a new postcode added to the list within LIS.

To delete a postcode, complete the following steps:

Step	Action
1	Search for the required new postcode, or select it in the list of postcodes.
2	Click on the Delete button  The selected new postcode will be deleted.

16. Viewing the Audit Log

16.1 Overview

The LIS application keeps a log of some of the events or operations carried out. Entries to the log file include the time and date of the event and a short description. The log file is stored in the Auditlog LIS subdirectory by default.

The log file can be viewed from within LIS. The information may be useful for diagnosis if problems have occurred.

The log can be truncated; refer to Section 15.4 Truncating the Log (See page 73).

16.2 Viewing the Log

To view the log file from within the LIS, complete the following step:

Step	Action
1	Access the Log screen. If the log is long, use the vertical scroll bar to view other operations at the bottom of the list.

17. Technical Information

17.1 Overview

You may want to look at the data stored by LIS. This is outlined in the section below.

17.2 Looking at Data Stored by LIS

The LIS stores data in an internal database. The database is a Microsoft Access file called LISData2000.mdb. It can be found in C:\LIS\Release17\Data if the default directory structure is used at the time of installation.

The file is read-only. An error message will appear if you attempt to open this file. You can access the database using the LIS database shortcut in C:\LIS\Release17\. When opening the database with the shortcut type 'password' in the password box. This password will correspond to the password used for LIS itself, so if you changed this, the password for the database will change also.

To manipulate the data held in the database, you must export the database. You can use the Export DB function in LIS to export the database.

The export database function does not create a file that is suitable for transmission to the LSC. Files which are sent to the LSC having been exported from the LIS must be an ILR Export.

The Export DB function exports data stored within the LIS programme in one of three formats; as a Microsoft Access 2000 file (MDB format), as dBase III files (DBF format) or as comma separated values (CSV format).

The tables exported by this option are described in the *LIS Database, Derived Variables and Report Guidance* for LIS 16.01, available on the LIS pages of the LSC website. You can choose to export most of the tables from the LIS internal database.

If exporting data to a file in dBase format (.DBF file), there is an option to use short file names rather than long file names. This is to assist users of Microsoft Access, which does not appear to support use of DBF files with long file names. The different table names in short dbf format are listed in the *LIS Database, Derived Variables and Report Guidance*.

Export the database in one of two ways:

- using Batch Import
 - using Report Manager.
-

17.3 Database Export using Batch Import

To export the database using Batch Import, see Section 7.10 Export DB (See page 34).

Continued on next page

17. Technical Information, Continued

17.4 Database Export using Report Manager

To export the database using Report Manager, complete the following steps:

Step	Action										
1	Access the Report Manager screen.										
2	Click on the Export DB button. The Export Database dialogue box appears.										
3	You can use the Default Export Settings or select your own: <table border="1" data-bbox="560 678 1361 1308"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>You have the Use default export settings? check box checked</td> <td>You can select an Export Type from the list by clicking the appropriate radio button. Each time a table is exported you will be prompted for an Export Type for that table.</td> </tr> <tr> <td>You uncheck the Use default export settings? check box</td> <td>The Export Type options are disabled and all tables will be exported in the same format.</td> </tr> <tr> <td>You check the Use short files names for DBF export check box</td> <td>Short file names will be used in the export.</td> </tr> <tr> <td>You uncheck the Use short files names for DBF export check box</td> <td>Default settings for file names are maintained.</td> </tr> </tbody> </table>	IF...	THEN...	You have the Use default export settings? check box checked	You can select an Export Type from the list by clicking the appropriate radio button. Each time a table is exported you will be prompted for an Export Type for that table.	You uncheck the Use default export settings? check box	The Export Type options are disabled and all tables will be exported in the same format.	You check the Use short files names for DBF export check box	Short file names will be used in the export.	You uncheck the Use short files names for DBF export check box	Default settings for file names are maintained.
IF...	THEN...										
You have the Use default export settings? check box checked	You can select an Export Type from the list by clicking the appropriate radio button. Each time a table is exported you will be prompted for an Export Type for that table.										
You uncheck the Use default export settings? check box	The Export Type options are disabled and all tables will be exported in the same format.										
You check the Use short files names for DBF export check box	Short file names will be used in the export.										
You uncheck the Use short files names for DBF export check box	Default settings for file names are maintained.										
4	The export path is read-only. Click OK . Cancel will cancel the database export.										
5	A confirmation message displays after exporting the database. Click OK .										

18. Command Line Option

18.1 Overview

The Command Line option allows you to run the LIS without using the LIS application interface. You can therefore run the LIS in the background or at a time more convenient to you, for instance running a large ILR data file overnight. When the LIS is run in this way it refers to the 'saved defaults' within the 'Batch Import' screen.

This operation can be called from Scheduled Tasks, located in the Windows Control Panel. This allows you to run the operation at a specified time and date.

Or it can be started by an MS-DOS command line prompt. This can either be run from the Command Prompt or saved as a text file and run immediately when executed from its icon.

18.2 Preparing LIS to run the Command Line Option

To prepare LIS to run the command line option, complete the following steps:

Step	Action						
1	Launch LIS and navigate to the Batch Import screen.						
2	Select the following import options: <ul style="list-style-type: none"> • provider number and name • collection and type • Learning Aim Database • at least one operation. <p>Note: These options are mandatory and must be selected before attempting to run the command line option.</p>						
3	Select any of the optional extras: <ul style="list-style-type: none"> • type of validation • export options • report options. <p>Note: Any files in the 'Files selected to import' area will be overwritten by the files referred to in the command line.</p>						
4	Click the Save Defaults button.						
	<table border="1"> <thead> <tr> <th>IF...</th> <th>THEN...</th> </tr> </thead> <tbody> <tr> <td>The saved defaults are not set on the Batch Import screen</td> <td>The batch operation will not run and the audit log file will be populated with the error 'Default Settings not set – LIS Batch Operation cancelled'.</td> </tr> <tr> <td>The saved defaults are set on the Batch Import screen</td> <td>The batch operation will run successfully.</td> </tr> </tbody> </table>	IF...	THEN...	The saved defaults are not set on the Batch Import screen	The batch operation will not run and the audit log file will be populated with the error 'Default Settings not set – LIS Batch Operation cancelled'.	The saved defaults are set on the Batch Import screen	The batch operation will run successfully.
IF...	THEN...						
The saved defaults are not set on the Batch Import screen	The batch operation will not run and the audit log file will be populated with the error 'Default Settings not set – LIS Batch Operation cancelled'.						
The saved defaults are set on the Batch Import screen	The batch operation will run successfully.						

Continued on next page

18. 18. Command Line Option, Continued

Step	Action
5	Exit the application. To ensure integrity of the database, LIS must be closed before the command line function executes. If LIS is running on your machine, the error 'LIS already in use – LIS Batch Operation cancelled' is written to the audit log.

18.3 Viewing Error Messages

When running LIS using the command line option, all error messages are suppressed. Suppressed error messages are written to the LIS audit log file. An entry is created for each operation in the audit log.

18.4 Setting up a Scheduled Task

To set up a task using the Task Scheduler, follow the steps below:

Step	Action
1	Run the Task Scheduler application from within the Control Panel.
2	Select Add Scheduled Task and follow the on-screen instructions.
3	You will need to tell the scheduler where the LIS has been installed; when and how often to run the LIS; and you may need to add your machine login details so the task runs as if it were started by you.

18.5 Cancelling a Scheduled Task

To cancel a task that is set to run at a specific time and date, follow the steps below:

Step	Action
1	Run the Task Scheduler application from within the Control Panel.
2	Either untick the 'enabled' checkbox and click on 'Apply', or select the scheduled task and chose 'Delete'.

18.6 Command Line Syntax

The command line function requires three parameters:

- the filename to import
- the file path of the import
- the file path of the exported LIS_exp.mdb database.

The way these pieces of information are coded is as follows:

- -i <import directory>
- -f <filename to import>
- -e <export directory>

A complete piece of command line syntax would be as follows:

```
C:\LIS\Release17\LIS.exe -e D:\MyExportFolder -i D:\MyImportFolder -f a99999500260080900201.W01
```

Which breaks down as:

- 'C:\LIS\Release17\LIS.exe', which triggers the LIS from its .exe file in the C drive and folders as specified
- '-i D:\MyImportFolder', which tells the LIS to look in the MyImportFolder in the D drive for the file defined by -f
- '-f a99999500260080900201.W01', which tells the LIS the name of the file to import
- '-e D:\MyExportFolder', which tells the LIS to export the LIS_exp.mdb to the folder in the D drive named 'MyExportFolder'

In addition to the above guidance:

- If the import file path is defined by -f, for example: -f D:\MyImportFolder\a99999500260080900201.W01, then the parameter set by -i will not be used and is therefore not necessary.
- If no file path is stated, for -i the last known import file path will be used and for -e the default LIS\Exports folder will be used.
- Another program can be run from the command line by using the -r parameter in the syntax. An example of the -r parameter is: -r c:\Program Files\Microsoft office\office11\MSACCESS.EXE "c:\test.mdb". The latter part in quotes directs the program to the file to be opened.

Continued on next page

18. 18. Command Line Option, Continued

18.7 Running an MS-DOS Prompt

To set up and run an MS-DOS prompt, complete the following steps:

Step	Action
1	Click Start from the task bar at the bottom of your screen.
2	Select All Programs > Accessories > Command Prompt . The Command Prompt box displays. The prompt flashes.
3	Type in the command line syntax.
4	Press Enter to run the LIS operation.
5	To stop the operation, press Cancel from the LIS Batch Import screen.

18.8 Creating an MS-DOS Command Line File

To create an MS-DOS command line file (or 'Batch file') in Notepad, complete the following steps:

Step	Action
1	Open a new Notepad document.
2	Type in the command line syntax.
3	Save as a .bat document.
4	To run the MS-DOS code within the document, double-click the document icon.
5	To edit the document, right click on the icon and select Edit.

19. Glossary

19.1 Glossary

Details of abbreviations and acronyms used within this document. Terms are listed alphabetically, rather than in order of appearance, and using the correct Upper or Lower case as you would expect to see them.

Additional commonly used acronyms, can be found at:
<http://www.lsc.gov.uk/providers/Data/help/Commonly-used+Acronyms.htm>

Term	Definition of Term
ALS	Additional Learning Support
csv	Comma Separated File
DB	Database
dbf	Database File
DSAT	Data Self-assessment Toolkit
ER	Employer Responsive
ESF SR	European Social Fund Employer Responsive
IA	Information Authority
ILR	Individualised Learner Record
LAD	Learning Aim Database
LIS	Learner Information Suite
LLSC	Local LSC
LR	Learner Responsive
LSC	Learning Skills Council
mdb	Microsoft Access Database file format
MS-DOS	Microsoft Disk Operating System
OLDC	Online Data Capture System
UFI	University for Industry
UPIN	Unique Provider Identifier Number

20. Further Information

20.1 Further Information

Additional information that may be useful when using the guide and the LIS

ILR 2009/10 Specification	Specification of the Individualised Learner Record Batch Data Capture File for 2009/10 – available from http://www.theia.org.uk/downloads/ilrdocuments/ilrdetail.htm
Validation rules spreadsheet and guidance	Validation rules release 3 (as used in LIS 17.01) and guidance – available from http://www.theia.org.uk/downloads/ilrdocuments/ilrdetail.htm