

Quick Start

Learner Information Suite 18.01



Introduction

This guidance is for users of the Learner Information Suite (LIS) version 18.01 who are new to the software. It takes users through downloading the software through to importing data, producing reports and exporting data.

This guide will show users how to:

1. Download LIS 18.01
2. Install LIS 18.01
3. Import the LIS 18.01 Provider Data Update, Postcode data File, Employer Data and Patch Update
4. Import, validate and calculate funding using LIS 18.01
5. View SLN and funding details and calculation variables
6. Export the LIS database
7. Export the imported data as an ILR file for submission to OLDC

This procedure should be used to:	Download LIS 18.01	1
It applies to:	All	

Step	Action
1	Navigate to the page on the LSC website containing LIS installation files http://www.thedataservice.org.uk/Services/DataCollection/software/lis/lis_18_01.htm
2	Download the following zip files: LIS 18.01 Full installation Microsoft .NET Framework 2.0 installation LIS 18.01 provider data update Database Update Postcode Data File Employer Data File
3	Unzip the downloaded files. These files have been created using Legacy Compression. This means that they can be unzipped with every version of Winzip since version 2.0 including the compression tool embedded with Windows XP. If you experience difficulties unzipping the files please see the guidance on the LIS download page which provides a link to a compression tool which will help.

This procedure should be used to:	Install LIS 18.01.	2
It applies to:	All	

Step	Action
1	Do not try to install Learner Information Suite unless you have and are using <u>full system administrator rights</u> to the PC and have set the PC to be off-network in standalone mode. Failure to do so will build errors into the installation process. If you are unsure of this please consult your own systems support experts.
2	In the unzipped LIS 18.01 Full Installation folder, double click the file named 'setup.exe'. The installation wizard will now start-up. Follow the instructions as they appear, select the folder you wish the LIS installation files to be stored in when that option appears.
3	If there is currently no version of .Net Framework installed on the host PC an error message and the user will be prompted to commence a process to install it. Follow that action and then re-run the LIS 18.01 installation
4	Open the newly installed LIS 18.01 from the start icon.
5	Enter "password" into the password field. The password can be changed at this point but the new password also becomes the password to open the LIS backend database. If the user forgets the password the LIS will need to be reinstalled.

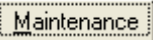



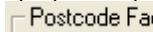
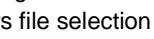
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6	If you experience problems with starting LIS please see the Frequently Asked Questions document before reporting them to the Data Service Service desk.
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This procedure should be used to:	Import the Provider Data Update, Database Update, Postcode data File, and Employer Data into LIS 18.01.	3
It applies to:	ILR collection types LR and ER	






Step	Action
1	As in section 1 of this guide, download and unzip the latest versions of the files named 'Provider Data update', 'Database Update', 'Postcode Data File' and 'Employer Data File' from the LIS 18.01 software download page. These files must be imported before using the LIS to calculate learner and aim data.
2	Access the Maintenance screen  within the Options  Options tab in the LIS menu
3.1	<p>The Provider Data update file contains regularly updated data tables used by the LIS to process ILR data such as the Provider List. The Provider List contains the UPIN of each learning provider who makes an ILR data submission to the On-Line Data Collections system and their specific funding calculation factors and lookups. It is published with changes regularly.</p> <p style="text-align: center;"></p> <p>To update the Provider data in LIS click on the 'Update Data'  button in the Maintenance screen. A Windows file selection window will appear, navigate to the location where the downloaded and unzipped Provider Data Update has been stored and select that file. The LIS should now update itself and a message will appear to inform the user of the update status. If the imported data has the same date stamp as the current data a message will appear to tell the user that the data is already up-to-date.</p>
3.2	The Database update file has been published with LIS 18.01 as it contains data which will change the lookup information in LIS's database for ILR field A70 and a value in the Employer Responsive calculation for achievements. It is necessary that users make sure they have updated LIS 18.01 with this data before running any ILR data through it. To run the Database update use the 'Update Data' method as used to update the Provider Data in part 3.1 above. If this data update has already been imported a message will appear to tell the user that the data is already up-to-date.
3.3	The Postcode Data file contains the Area Cost and Disadvantage factors used in the Employer Responsive funding calculation. To update the Provider data click the Change button for Postcode Factors  . A Windows file selection window will appear, navigate to the location where the downloaded and unzipped Postcode Factors file has been stored and select that file. The file location and date stamps for the data as contained in the Postcode Data file will be displayed on the Maintenance screen.
3.4	The Employer Data file contains the Large Employer Discount Factors used in the ER funding calculation. To update the Employer data click the Change button for Employer Data  . A Windows file selection window will appear, navigate to the location where the downloaded and unzipped Employer file has been stored and select that file. The file location and date stamps for the data as contained in the Postcode Data file will be displayed on the Maintenance screen.

This procedure should be used to:	Import, validate and calculate funding using LIS 18.01.	4
It applies to:	All	

Step	Action
1	Obtain an ILR data file which matches the ILR 2010/11 specification.
2	Log in to LIS 18.01 and access the Batch Import screen.
3	Ensure that the latest version of the LAD has been downloaded and linked to LIS 18.01

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	<p>Learning Aim Database Version: v.009 - 09/07/2010 Location: c:\drived\lads\lad_20100709_mdb\lad2010070</p> <p></p>
4	<p>Select the correct Provider;</p> <p>Provider <input type="text" value="999995"/> LSC Test Provider - Do not use for real data </p> <p>Collection Type and Collection (which must match your ILR data file).</p> <p>Collection Type <input type="text" value="ER"/> Collection <input type="text" value="ER01"/></p>
5	<p>Select the file to import</p> <p>Import Area: c:\mis\release18\imports</p> <p>Files selected to import:</p> <p><input type="text" value="A99999500101100101.ER01"/>  </p> <p>Select the operations required</p> <p>Select Operations</p> <p><input checked="" type="checkbox"/> Import ILR Data <input type="radio"/> All Validation Rules</p> <p><input checked="" type="checkbox"/> Validate Data <input type="radio"/> Funding Rule Subset</p> <p><input type="checkbox"/> Calculate LR Funding</p> <p><input checked="" type="checkbox"/> Calculate ER Funding <input checked="" type="checkbox"/> Calculate Derived Data</p> <p>Click 'Start' to begin the Batch Import process</p> <p></p>
6	<p>A message will appear to inform the user whether the Batch Import has completed or has been aborted because of an Import error or any other reason. If the process has been aborted please consult the Frequently Asked Questions document before contacting the Data Service Service desk.</p> <p>If there are any non-critical import errors the import will run but the process may not be complete. Resolve any import errors (use the rule name and description as listed in the report and refer to the ILR specification. In some cases you may need to look at the ILR file itself). You will need to make the changes in your MIS and re-create the ILR data file. Repeat steps 5 to 6 until the file imports without import errors.</p> <p>Note: Although some import errors do not cause the import to abort, if these aren't resolved it could result in data being excluded from the imported ILR data, or the file may not import at all. This leads to incomplete data in the ILR export.</p>
7	<p>If there have been validation rule errors found the batch import process will complete but will not inform the user. To see the validity status of the imported ILR data file check the Rule Violation reports in Report Manager for import errors, validation errors, calculation errors and warnings. Look at the Summary Report Table at the end of the Rule Violations or Rule Violations Summary Report and see if the 'number of invalid' learners in the 'fully validated learners' box is zero.</p>
8	<p>If the 'number of invalid' learners in the 'fully validated learners' box is it is not zero, refer to the details in the Errors section of the report and look at the ILR data to locate the source of the error. The rule name indicates the fields to check, for instance the validation rule A14_A69_1 implies that the error has arisen from the relationship between the data in fields A14 and A69. You may also wish to refer to the ILR specification, the validation rules spreadsheet and validation rules guidance document.</p>






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	Note: You may find it useful to run the Rule Violations report (from the Report Manager screen) to see a more detailed breakdown of where the errors occur. This may be a very large report if there are many errors, in this event you can use enter values into filter text boxes to focus on particular learners or learning aims or types of errors, such as LR funding or import errors.
9	Resolve the errors in your ILR data source which may be your MIS system; and recreate the ILR file. Repeat steps 5 to 9 until the 'number of invalid' learners in the 'fully validated learners' box on the Rule Violations / Rule Violations Summary report is zero.

This procedure should be used to:	View SLN and funding details and calculation variables.	5
It applies to:	ILR Collection types LR and ER	

Step	Action
1	Successfully import, validate and calculate the funding for a 2010/11 ILR file as described in section 4.
2	Navigate to the ER Funding Viewer in the folder items on the left-hand side of the LIS, The ER Funding Viewer screens are functionally the same but have small differences in their content as per their different methodologies. 
3	At the top of the Funding Viewer screen are two options for selecting learners to view, one to select all learners (or the first hundred); and another to view selected individual learner records. To show all learner records, select the all records button  . All records or the first one hundred learners if there are a hundred or more learners will be shown in the funding viewer cells. These records can be toggled through serially by using the arrows in the top left of the screen  . Please note that learners cannot be toggled through in batches of one hundred at a time. If there are more than a hundred and the record to be viewed is beyond that range then the learner record search option below should be used. To search for and view individual learner records, Student Reference numbers (ILR field L03) or Learner surnames (ILR field L09) can be entered in the search-text box. Enter a valid Learner Reference or Surname in the text box and click the magnifying-glass icon and the learner funding details will be displayed in the funding viewer cells. 
4	Underneath that section are the following tabs:  The tabs above show the various ILR fields; lookup values from the LIS and LAD; SLN and cash values calculated; variables generated during calculation; and errors discovered, if any exist. The information shown is disseminated hierarchically from left to right, starting first with a learner selection and then their aims. Some details for the Learner selected are shown in the same screen in individual white text boxes. The data displayed under these tabs are stored in the LIS's backend database tables which can be exported for further analysis. For guidance on the contents of the database please see the document 'Database Guidance' which is available from the LIS 18.01 Software download page.

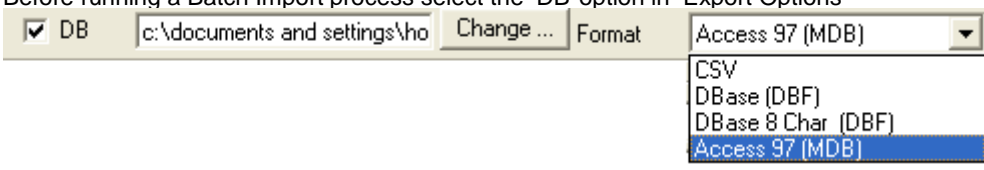
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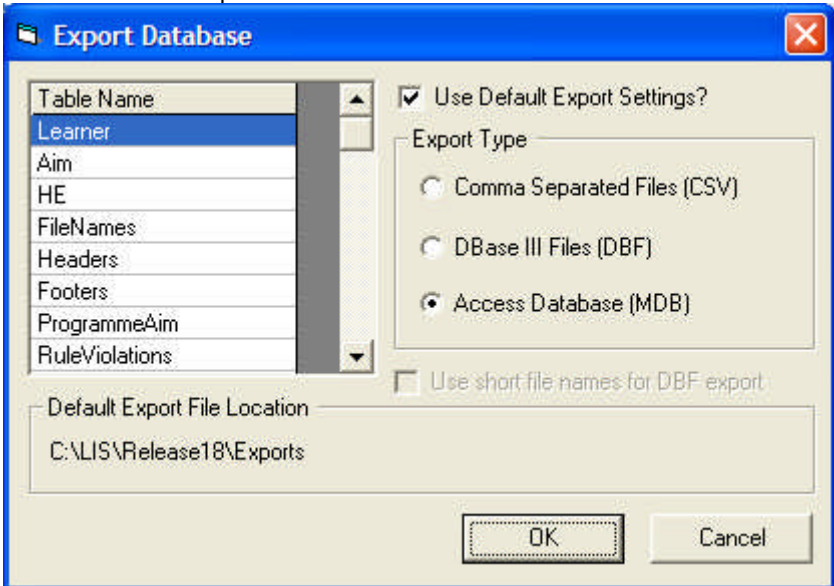
This procedure should be used to:	Export the LIS database	6
It applies to:	Users who wish to analyse the results of a Batch Import or use exported data tables in a separate application	

There are two methods for exporting the LIS database

Method 1

Step	Action
1	<p>Before running a Batch Import process select the 'DB' option in 'Export Options'</p>  <p>This allows the user to select a destination to export the database to at the end of a batch import process and the format in which to export the data. If Access 97 (MDB) is selected then the tables will be exported within a single access database, the other options will export the tables individually as CSV or DBF files. If no folder is selected the default destination folder will be 'Exports' in LIS 18.01's root folders.</p>

Method 2

1	<p>Alternatively, users can find the same options under Report Manager  by selecting Export DB</p>  <p>The following box will appear. It has a different layout than before but gives the same export options. If the user deselects the tick box for 'Use Default Export Settings' they will be prompted to choose an export destination rather than the default folder 'Exports' in LIS 18.01's root folders.</p> 
2	<p>It may take a few minutes to complete the database export depending on the size of the imported ILR file. The progress will be shown in the status bar at the bottom left hand side of the LIS window. Do not close the LIS until it has been completed.</p>

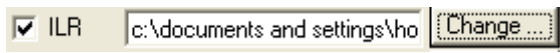

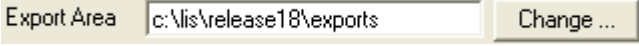
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3	When analysing the exported tables users are advised to consult the document 'Database Guidance' which is available from the LIS 18.01 Software download page.
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This procedure should be used to:	Export the imported data as an ILR file to upload into OLDC.	7
It applies to:	All	

There are two methods for exporting an ILR file	
Please Note: When an ILR file is exported from LIS it will only include valid learners. If any ILR data has an error none of the Learner's aim data will not appear in the exported file.	
Method 1	
Step	Action
1	<p>Before running a Batch Import process select the 'ILR' option in 'Export Options'</p>  <p>This allows the user to select a destination to export the ILR file to at the end of a batch import process. If no folder is selected the default destination folder will be 'Exports' in LIS 18.01's root folders.</p>
Method 2	
1	Alternatively, there is the ILR export functionality under 'Export ILR File'  'Export ILR File' in the LIS menu.
2	Users can select the export destination folder; the default destination folder is 'Exports' in the LIS 18.01's root folders if this field is left blank. 
3	There is an option to select Live or Test as the data type. This writes a value in the ILR file header record of either 1 or 2. Whatever the value is set to, it will not stop a file being accepted when it is submitted to On-Line Data Collections.
4	When the button named 'Export' is selected the LIS will export an ILR file to the selected destination folder.

Further Information

ILR 2010/11 Specification and validation rules spreadsheet and guidance	http://www.theia.org.uk/downloads/ilrdocuments/20101_ilrdetail.htm
LIS 18.01 Software and Guidance Documentation	http://www.thedataservice.org.uk/Services/DataCollection/software/lis/lis_18_01.htm

Further Support and advice

Queries should be directed to the Data Service Helpdesk at the following:

Email: servicedesk@thedataservice.org.uk

Tel: 08702 670001