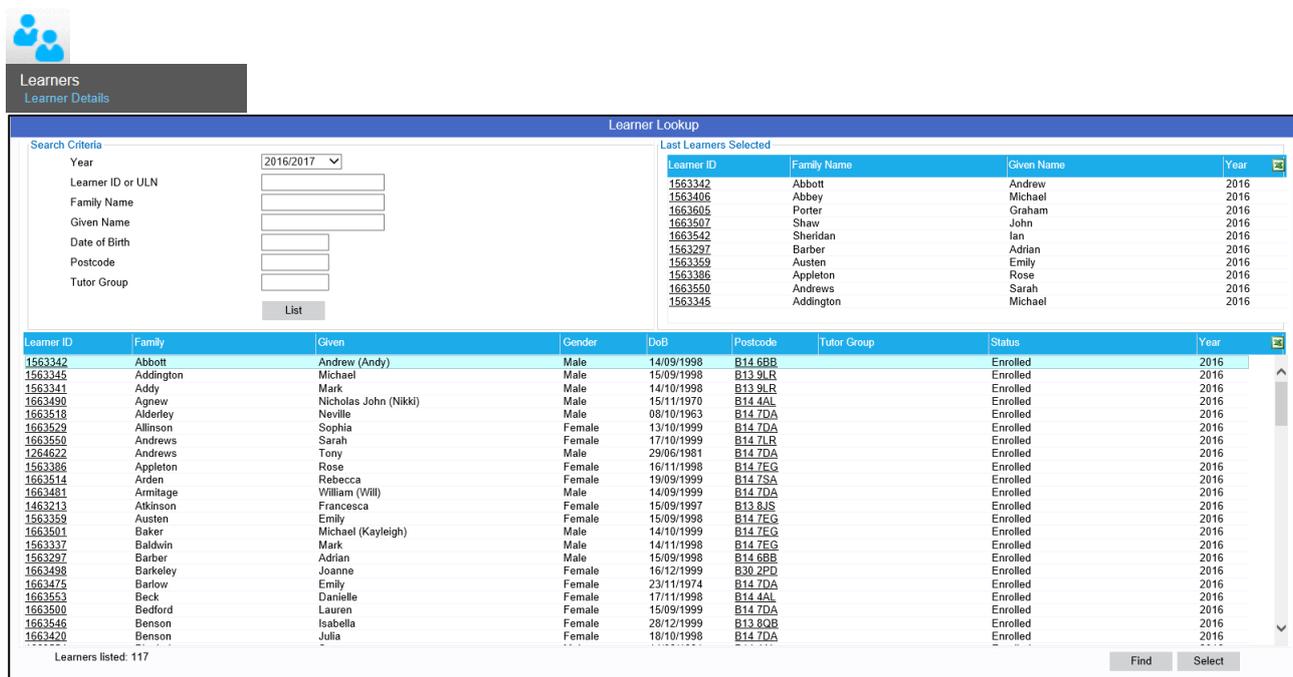


Learner Lookups

Portal has a number of learner lookups in the various learner modules. While each of them may look similar they often do different jobs and, unlike Core, are **specific** to the task in hand. This is mainly for performance reasons to avoid vast amounts of data having to be sent between server and client.

Learner Details/Learner Lookup

The Learner Details Lookup is accessed from the Learner Details menu as displayed below. It is designed to search the database for all *enrolled learners* that match the search criteria entered. Upon entry the default year is set to the current Academic Year. Other academic years or 'All Years' may be selected from the drop down list.



Learners
Learner Details

Learner Lookup

Search Criteria

Year: 2016/2017

Learner ID or ULN:

Family Name:

Given Name:

Date of Birth:

Postcode:

Tutor Group:

List

Last Learners Selected

Learner ID	Family Name	Given Name	Year
1563342	Abbott	Andrew	2016
1563406	Abbey	Michael	2016
1663605	Porter	Graham	2016
1663507	Shaw	John	2016
1663542	Sheridan	Ian	2016
1563297	Barber	Adrian	2016
1563359	Austen	Emily	2016
1563386	Appleton	Rose	2016
1663550	Andrews	Sarah	2016
1563345	Addington	Michael	2016

Learner ID	Family	Given	Gender	DoB	Postcode	Tutor Group	Status	Year
1563342	Abbott	Andrew (Andy)	Male	14/09/1998	B14 6BB		Enrolled	2016
1563345	Addington	Michael	Male	15/09/1998	B13 9LR		Enrolled	2016
1563341	Addy	Mark	Male	14/10/1970	B13 9LR		Enrolled	2016
1663490	Agnew	Nicholas John (Nikki)	Male	15/11/1970	B14 4AL		Enrolled	2016
1663518	Alderley	Neville	Male	08/10/1963	B14 7DA		Enrolled	2016
1663529	Allinson	Sophia	Female	13/10/1999	B14 7DA		Enrolled	2016
1663550	Andrews	Sarah	Female	17/10/1999	B14 7LR		Enrolled	2016
1264622	Andrews	Tony	Male	29/06/1981	B14 7DA		Enrolled	2016
1563386	Appleton	Rose	Female	16/11/1998	B14 7EG		Enrolled	2016
1663514	Arden	Rebecca	Female	19/09/1999	B14 7SA		Enrolled	2016
1663481	Armitage	William (Will)	Male	14/09/1999	B14 7DA		Enrolled	2016
1463213	Atkinson	Francesca	Female	15/09/1997	B13 8JS		Enrolled	2016
1563359	Austen	Emily	Female	15/09/1998	B14 7EG		Enrolled	2016
1663501	Baker	Michael (Kayleigh)	Male	14/10/1999	B14 7EG		Enrolled	2016
1563337	Baldwin	Mark	Male	14/11/1998	B14 7EG		Enrolled	2016
1563297	Barber	Adrian	Male	15/09/1998	B14 6BB		Enrolled	2016
1663498	Barkeley	Joanne	Female	16/12/1999	B30 2PD		Enrolled	2016
1663475	Barlow	Emily	Female	23/11/1974	B14 7DA		Enrolled	2016
1663553	Beck	Danielle	Female	17/11/1998	B14 4AL		Enrolled	2016
1663500	Bedford	Lauren	Female	15/09/1999	B14 7DA		Enrolled	2016
1663546	Benson	Isabella	Female	28/12/1999	B13 8QB		Enrolled	2016
1663420	Benson	Julia	Female	18/10/1998	B14 7DA		Enrolled	2016

Learners listed: 117

Find Select

- **Search Criteria:** Enter data in the search criteria and **List**. List will return all enrolled learners for the selected year according to the search criteria entered. The view of the results list may be reordered by clicking on any heading. Use the hyperlink on the Learner ID or the Select button to access the learner's details.
- **Learner Details** is designed to give access to learner information to a wide range of staff via the Portal. For that reason the screens available within Learner Details are all primarily view-only with limited edit rights available in the Biographical screen only. Please note that user access rights must be set to allow access to screens and buttons within Learner Details There are also 5 buttons available:
 - Contacts
 - Notes
 - Correspondence
 - Documents
 - General Info
- Once accessed the learners may also be selected from the **Last Learners Selected** in the top right hand part of the screen.

Enrolment Entry/Amendment/Learner Lookup

The Enrolment Entry / Amendment screen is accessed from the Enrolment Details or Enrolment Wizard menus as displayed below. The Enrolment Learner Lookup is designed to search the database for all enrolled learners that match the search criteria entered. Upon entry the default year is set to the current Enrolment Year. Other years may be selected from the drop down list. Please note that this could include a future enrolment year if this has been created in the Core system.

Learners

- Learner Details
- Enrolment Management**
 - Enrolment Details
 - Enrolment Wizard

Enrolment Entry/Amendment
Recent saved incomplete enrolments Last Learners Selected

Details

Enrolment Year:

Learner ID or ULN:

Family Name:

Given Name:

Date of Birth:

Postcode:

List Pending Only

Learner ID	Family Name	Given Name
1663542	Sheridan	Ian

Learner ID	Family	Given	Gender	DoB	Postcode	Last Enrolled	Applicant	Zero Courses
1663416	Allen (prev. Barton)	Elizabeth Emily (Lizzie)	Female	28/09/1998	B14 7EW		✓	
1363017	Baggs	Annabelle (Belle)	Female	14/11/1996	B15 2QU	2014		
1463336	Bagshawe	Ian	Male	16/11/1981	B14 6BB	2015		
1663512	Bailey	Helen	Female	15/11/1981	B14 7LR			
07062164	Bailey	Lauren Emily	Female	18/11/1989	B14 7EW	2007		
1262798	Baines	Elizabeth-Jane (Lizzie)	Female	17/10/1995	B29 6BL	2013		
1563451	Baines	Ian	Male	14/11/1959	B13 9LR	2015		
1262855	Baker	Andrew	Male	12/12/1995	B21 9ET	2013		
1363138	Baker	Gary	Male	14/02/1987	B14 7EG	2014		
1663501	Baker	Michael (Kayleigh)	Male	14/10/1999	B14 7EG	2016		
1363126	Baldwin	Alec	Male	28/12/1996	B14 6PG			
1363127	Baldwin	Alec	Male	28/12/1996	B31 2RG			
07062198	Baldwin	Lisa	Female	18/11/1968	B31 1QJ	2007		
1563337	Baldwin	Mark	Male	14/11/1998	B14 7EG	2016		
1162684	Ball	Amy	Female	25/08/1994	B30 3AH	2013		
1262902	Ball	Harry	Male	14/12/1976	B15 2TY	2014		
1262686	Ball	John	Male	12/12/1995	B31 1QJ	2014		
1262853	Ballard	Janice	Female	15/11/1987	B23 5BY	2014		
1763557	Bamidele	Stephanie	Male	03/07/2000	GL52 3LZ		✓	

Matches found: 164

- **Details:** The intention here is that users enter as much information as they have about the enrollee and press **Check**. The system then sees if it can find matches. Please note that whilst this function appears similar to Learner Details described above the **Check** button will return a very different result. **Check** is designed to return *all learners who have attended the college in the past and/or are already applicants on the system*. The Check function here, therefore, is designed primarily to prevent the creation of duplicate records so the more details entered initially the better.
- **Results:** The view of the results list may be reordered by clicking on any heading:
 - Learner ID
 - Name
 - Gender
 - DoB
 - Postcode
 - Last Enrolled Year
 - Applicant (✓ displayed if yes)
 - Zero Courses (✓ displayed if the learner has been saved to the database without any course details being added)
- Use the hyperlink on the Learner ID or the Select button to choose an existing record to create an enrolment in the enrolment year selected or New to create a brand new learner enrolment record.

- Enter full details as displayed below.

- Even at this stage the system will check and provide a warning message if the details entered are similar to an existing learner as in the screen below where the learner's initials and postcode match an existing record on the system. Use Select if this record is correct or New to continue to create a brand new record.

Ref	Family Name	Given Name	Formerly	PostCode	DOB	ULN	NI No	Reason
1663536	Burns	Philip		B14 4AL	15/09/1999	0		Matching Postcode and Initials

Buttons: New, Select, Cancel

- Where a new enrolment record has been created the system will return a confirmation with the Learner ID:

- A number of screens are now available for entry/amendment of enrolment data. Standard buttons are also available on certain screens. Please note however that user rights must be set to allow access to screens and buttons within the Portal Enrolment modules.

- Recently Saved Incomplete Enrolments:** Recent saved incomplete enrolments is a list of those enrolments the user has last edited in the last 100 days that have either course enrolments with a status of 'pending' or no course enrolments at all. They are ordered with the most recently edited at the top.

- Last Learners Selected:** Click the radio button to switch the view in this part of the screen to access the user's last selected enrolled/completed learners within Enrolments.

Applications Details/Applications Lookup

The Applications Lookup screen is accessed from the Application Details or Applications Wizard menus as displayed below. The Applicant Lookup is different to Learner/Enrolment Lookups in that it is designed to be a *dual purpose* lookup. Two buttons are available from the search criteria part of the screen: **Check** and **List** and each one returns a different results list with different results screens as described below.

- Search:** Upon entry to the Portal Applications Lookup the default year is set to the current **Apply to Year** as defined in the system parameters in Core. Please note that the Application Year may differ to the Enrolment Year depending on settings in SDY – Set up College Calendar and Academic Year. Other Academic Years may be selected from the drop down list. Enter criteria for the search and use one of the two buttons **Check** or **List** to activate the search. The results will differ depending on which one is chosen.

Search Using Check Button

Hover over the button to see the tooltip

Check

List matching known learners

Applications Lookup

Search Criteria

Applications for Year: 2016/2017

Applicant ID or ULN:

Family Name: B

Given Name:

Date of Birth:

Postcode:

Check List

Last Applicants Selected

Applicant ID	Family Name	Given Name
1663493	Addison	Adrian
1763604	Jones	Jessica
1763595	Blake	Nathan
1663447	Bell	Sophia
1663346	Bardsley	Adrian
1663481	Armitage	William
1663416	Allen	Elizabeth
1663437	Almond	Julie

Learner ID	Family	Given	Gender	DoB	Postcode	Last Enrolled	Applicant	Zero Courses
1663416	Allen (prev. Barton)	Elizabeth Emily (Lizzie)	Female	28/09/1998	B14 7EW		✓	
1363017	Baggs	Annabelle (Belle)	Female	14/11/1996	B15 2QU	2014		
1463336	Bagshawe	Ian	Male	16/11/1981	B14 6BB	2015		
1663512	Bailey	Helen	Female	15/11/1981	B14 7LR			
07062164	Bailey	Lauren Emily	Female	18/11/1989	B14 7EW	2007		
1262798	Baines	Elizabeth-Jane (Lizzie)	Female	17/10/1995	B29 6BL	2013		
1563451	Baines	Ian	Male	14/11/1959	B13 9LR	2015		
1262855	Baker	Andrew	Male	12/12/1995	B21 9ET	2013		
1363138	Baker	Gary	Male	14/02/1987	B14 7EG	2014		
1663501	Baker	Michael (Kayleigh)	Male	14/10/1999	B14 7EG	2016		
1363126	Baldwin	Alec	Male	28/12/1996	B14 6PG			
1363127	Baldwin	Alec	Male	28/12/1996	B31 2RG			
07062198	Baldwin	Lisa	Female	18/11/1968	B31 1QJ	2007		
1563337	Baldwin	Mark	Male	14/11/1998	B14 7EG	2016		
1162684	Ball	Amy	Female	25/08/1994	B30 3AH	2013		
1262902	Ball	Harry	Male	14/12/1976	B15 2TY	2014		
1262686	Ball	John	Male	12/12/1995	B31 1QJ	2014		
1262853	Ballard	Janice	Female	15/11/1987	B23 5BY	2014		
1763557	Bamidele	Stephanie	Male	03/07/2000	GL52 3LZ		✓	

Applicants listed: 166

Find Withdraw New Add App Select

- Search Criteria:** Enter data in the search criteria and **Check** to see if the applicant has ever existed on the database. Check will return *all learners who have attended the college in the past and/or are already applicants on the system*. Please note that in this respect this is similar to **Check** within Enrolments and is designed to prevent the creation of duplicate records. The system displays:
 - Learner ID
 - Family Name
 - Given Name (preferred name in brackets)
 - Gender
 - DoB
 - Postcode
 - Last Enrolled Year
 - Applicant ✓
 - Zero Courses ✓
- Results:** This list may be reordered by clicking any of the headings. This information should be sufficient to inform the user and avoid the creation of a duplicate record.
- Buttons:** Other functions available from this screen via the buttons highlighted:
 - Select:** Edit the record.
 - Add App:** Add new application courses to the applicant in the selected year.
 - New:** Create a brand new applicant record.
 - Withdraw:** Withdraw the application at applicant level.

Search Using List Button

Hover over the button to see the tooltip

List

List application details in chosen year

Search Criteria
Applications Lookup

Applications for Year:

Applicant ID or ULN:

Family Name:

Given Name:

Date of Birth:

Postcode:

Applicant ID	Family Name	Given Name
1663493	Addison	Adrian
1763604	Jones	Jessica
1763595	Blake	Nathan
1663547	Bell	Sophia
1563346	Bardsley	Adrian
1663481	Armitage	William
1663416	Allen	Elizabeth
1663437	Almond	Julie

Applicant ID	Family	Given	No.	Application Date	Gender	DOB	Postcode	Last Action
1262846	Bouvet	Jackie	1	20/10/2016	Female	12/11/1948	B14 6BB	Schedule the interview
1563346	Bardsley	Adrian	1	10/03/2016	Male	16/09/1954	B13 0SA	Acknowledge Application by Email
1663416	Allen (prev. Barton)	Elizabeth Emily (Lizzie)	1	14/03/2016	Female	28/09/1998	B14 7EW	Acknowledge Application by Email
1663430	Boyd	Brian	1	04/04/2016	Male	14/11/1998	B14 7DA	Acknowledge Application by Email
1663443	Bridger	Matthew (Matt)	1	14/04/2016	Male	14/11/1994	B14 6DT	Schedule the interview
1663547	Bell	Sophia	1	10/01/2017	Female	19/09/1999	B14 7LR	Schedule the interview
1663553	Beck	Danielle	1	19/01/2017	Female	17/11/1998	B14 4AL	Schedule the interview
1763557	Bamidele	Stephanie	1	14/12/2016	Male	03/07/2000	GL52 3LZ	Schedule the interview
1763558	Banks	Sidra	1	14/12/2016	Male	04/07/2000	GL52 3LZ	Schedule the interview
1763559	Bano	Shakira	1	14/12/2016	Male	05/07/2000	GL52 3LZ	Schedule the interview
1763560	Beech	Olivia	1	14/12/2016	Male	06/07/2000	GL52 3LZ	Schedule the interview
1763561	Bond	Naima	1	14/12/2016	Male	07/07/2000	GL52 3LZ	Schedule the interview
1763562	Buller	Molly	1	14/12/2016	Male	08/07/2000	GL52 3LZ	Schedule the interview
1763581	Barrett	Anna	1	23/01/2017	Female	23/12/1979	B14 4AL	Schedule the interview
1763595	Blake	Nathan	1	31/01/2017	Male	15/09/1999	B14 4AL	Schedule the interview
1763602	Barnett	David	1	01/02/2017	Male	19/11/1991	B14 4AL	Schedule the interview

Applicants listed: 16

- **Search Criteria:** Use **List** to find *existing, current year applicants*. The system will now return existing applicants for the current year with different headings in the results screen which now displays:
 - Applicant ID
 - Family Name
 - Given Name (preferred in brackets)
 - Application Number
 - Application Date
 - Gender
 - Date of Birth
 - Postcode
 - Last Action for this applicant (populated by the Activity Management system)
- **Results:** This list may be reordered by clicking any of the headings.
- **Buttons:** Other functions available from this screen via the buttons highlighted:
 - **Select:** Edit the record.
 - **Add App:** Add new application courses to the applicant in the selected year.
 - **New:** Create a brand new applicant record.
 - **Withdraw:** Withdraw the application at applicant level.

Last Applicants Selected

- Once accessed the applicants may also be selected from the 'Last Applicants Selected' part of the screen.

Enquiry Details/Learner Lookup

The Enquiries Learner Lookup screen is accessed from the Enquiry Details menu as displayed below. The Enquiries Lookup is designed to search the database for *all enquirers* that match the search criteria entered. Upon entry the default dates displayed are the last 12 calendar months from today's date. This may be overwritten on entry. Please note that unlike Applications and Enrolments, Enquiries are not year-based.

Learnings
Learner Details

Enrolment Management
Enrolment Details
Enrolment Wizard
Programme Based Enrolment Wizard
Payment Entry
Ad Hoc Payments

Application Management
Application Details
Applications Wizard

Enquiries Management
Enquiry Details

Enquiries Lookup

<p>Search Criteria</p> <p>Enquiries between <input type="text" value="13/02/2016"/> and <input type="text" value="13/02/2017"/></p> <p>Enquirer ID or ULN <input type="text"/></p> <p>Family Name <input type="text"/></p> <p>Given Name <input type="text"/></p> <p>Date of Birth <input type="text"/></p> <p>Postcode <input type="text"/></p> <p style="text-align: center;"><input type="button" value="List"/></p>	<p>Last Enquirers Selected</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Enquirer ID</th> <th>Family Name</th> <th>Given Name</th> </tr> </thead> <tbody> <tr><td>1763608</td><td>Jarvis</td><td>Helen</td></tr> <tr><td>1763589</td><td>Devlin</td><td>Peter</td></tr> <tr><td>1763552</td><td>Beck</td><td>Jason</td></tr> <tr><td>1663551</td><td>Harris</td><td>June</td></tr> <tr><td>1663549</td><td>Evans</td><td>Philip</td></tr> <tr><td>1663544</td><td>Moore</td><td>Alison</td></tr> <tr><td>1663532</td><td>Jones</td><td>Martin</td></tr> <tr><td>1663511</td><td>Dalton</td><td>Neil</td></tr> </tbody> </table>	Enquirer ID	Family Name	Given Name	1763608	Jarvis	Helen	1763589	Devlin	Peter	1763552	Beck	Jason	1663551	Harris	June	1663549	Evans	Philip	1663544	Moore	Alison	1663532	Jones	Martin	1663511	Dalton	Neil
Enquirer ID	Family Name	Given Name																										
1763608	Jarvis	Helen																										
1763589	Devlin	Peter																										
1763552	Beck	Jason																										
1663551	Harris	June																										
1663549	Evans	Philip																										
1663544	Moore	Alison																										
1663532	Jones	Martin																										
1663511	Dalton	Neil																										

Reference	Family	Given	Enquiry Date	Latest Course Enquiry	Gender	DoB	Postcode
1663365	Gardner	Peter	12/07/2016		Male		
1663411	Thompson	Stuart	09/03/2016		Male		B14 7DA
1663423	Burton	Mark	30/03/2016	30/03/2016	Male	15/12/1976	B14 7DA
1663424	Carvell	Emma	30/03/2016	30/03/2016	Female	14/10/1965	B14 7EW
1663425	Higgins	Peter	30/03/2016	30/03/2016	Male	16/09/1954	B14 7EW
1663426	White	George	30/03/2016	30/03/2016	Male	14/09/1954	B14 7EW
1663428	Taylor	Emily	30/03/2016	30/03/2016	Female	12/07/1979	B14 6BB
1663431	Harvey	Dennis	04/04/2016	04/04/2016	Male	14/10/1959	B14 7LR
1663435	Levy	Ian	05/04/2016	05/04/2016	Male		
1663441	Thomas	Colin	14/04/2016	14/04/2016	Male	12/09/1959	B14 7DA
1663473	Greer	Judy	21/06/2016	21/06/2016	Female	15/08/1969	B14 7DA
1663480	Gordon	Peter	29/06/2016	29/06/2016	Male	15/11/1965	B14 7DA
1663483	Jackson	Ian	30/06/2016	30/06/2016	Male	31/10/1979	B13 8US
1663487	Dolan	Mary	12/07/2016	12/07/2016	Female	31/12/1999	B14 7DA
1663510	Kennedy	Nicola	06/10/2016		Female	14/09/1979	B14 7DA
1663511	Dalton	Neil	06/10/2016		Male	15/11/1976	B14 7EG
1663512	Bailey	Helen	06/10/2016	06/10/2016	Female	15/11/1981	B14 7LR
1663513	Cathoun	Paul	13/10/2016		Male	15/11/1987	B14 7EG
1663531	March	Joanna	23/11/2016	23/11/2016	Female	17/09/1965	B14 4AL
1663532	Jones	Martin	23/11/2016	23/11/2016	Male	16/09/1981	B14 7SA
1663543	Connolly	John	05/01/2017	05/01/2017	Male	15/09/1964	B14 7LR
1663544	Moore	Alison	05/01/2017	05/01/2017	Female	14/09/1961	B14 7SA
1663549	Evans	Philip	10/01/2017	10/01/2017	Male		B14 7SA
1663551	Harris	June	12/01/2017		Female		B14 7LR

Enquirers listed: 27

- **Search Criteria:** Enter data in the search criteria and **List**. This will return all enquirers for the selected date range and criteria entered. The results list may be reordered by clicking on any heading and includes:
 - Enquirer ID
 - Name
 - Enquiry Date
 - Latest Course Enquiry Date
 - Gender
 - Date of Birth
 - Postcode
- **Buttons:** Other functions available from this screen via the buttons highlighted:
 - **Select** to edit a current enquirer
 - **New** to create a brand new record
 - **Add Enq** to enables another enquiry to be created for the selected enquirer
- **Last Enquirers Selected:** Once accessed the enquirer may also be selected from this part of the screen.

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