Project Name	Parnassus
GA Project Number	428
Document	User Guide

Current Iss	Current Issue								
Date	Issue	Parnassus Version	Author	Change					
18/01/2022	5.5	V5.5	Avril Austin- Harvey	User Guide updates to sections below to incorporate changes in version v5.4 and v5.5 <b>3 User Management</b> Added Centre User Management details <b>5 Centre Maintenance</b> Centre alert message, Direct Claims Expiry date, Certificate Site Name <b>7 Learner Maintenance</b> Registration File reason rejected, updated Registration file data, Registration File Notes, Grade file return reason, Grade file DCS Expiry details added, Grade File Notes <b>8 Qualification Maintenance</b> Qualification Framework QAA added, Qualification review date, Registration address case <b>9 Unit Maintenance</b> Unit DCS and marks, Unit grade type defaults, Copying a unit <b>10 Certification</b> Added Certificate Validator details <b>13 Facilitators</b> Update to screen details and qualifications tab to show site qualifications. <b>14 EV Management and EV User set up</b> New EV user set up instructions, Site qualification and Site Unit information <b>15 Events</b> New information added for facilitator, learner, unit, EV and custom tabs					

Changes since the last version of the User guide appear in blue to make them easier to identify.

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23.1	REGISTRATION ITEM CODES ERROR! BOOKMARK NOT	DEFINED.

## Parnassus v5.5

For a list of new features and improvements please see the release notes for the version which are available to download on our website.

http://www.parnassusonline.com/release-notes/

Overview

For version 5.2 and onwards the User Guide and other helpful documents are now accessed by clicking on the help icon in the righthand corner of the top menu:

Ministères Centres Nomes Learnes Qualification + Centificates Reserving Contacts Admin Byets +

When you are logged into Parnassus this action will open a new browser window which takes the user to the Parnassus documents page of the Parnassus Online website:

		Parna	assus Doci	uments		
>>>	95 1 Parnassus User Guide 95 1 Parnassus User Guide for Reports					
****	v5.2 Robuses Violes v5.1 Informal Robuses Notes v5.0 Informal Robuses Notes v6.9 Robuses Notes					
****	v&B Release Folder v&B CPCR-3180-Parnastus and the RCF TQT v&7 Informal Release Notes v&7.7001 Informal Release Notes					
2	w6.6 Pre-Release Notes					

From here you can download the documents you need in PDF format and navigate them using the bookmarks:

Parnasaus User Guide				1.6	238	0 ± 6 🚺
	1				Ĩ	Bookmarks
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	GA Proje	ct Num	ber 428			> 3 Costomse User Loon Jama Cost.
	Docume	nt	User	Guide		a Aller Manager
	(A)				17	x = 0 set management
	Issue His	story		1.000		> 5 Overview of Main Menu
	Date	ISSUE	Version	Author	Unange	<ul> <li>b Centre Maintenance</li> </ul>
	22/02/17	1.0	v6.9	Avrii Austin- Harvey	- 4.6.1 Mandatory Purchase Order details     - 4.10 Managing Venues     - 5.9.2 Setting information added regarding	7 Venues     11 earners Meintemance
	07/06/17	1.1	y4.9	Avrii Austin-	Added information on EV Approval and Direct Import Mode	> 9 Quelification Mentenence
	14/08/17	5.0	v5.0	Gordon Harrison	User Guide Issue numbering changed to match Partnassus version numbering.	10 Certification
					Major update for re-written Parnassus features, as below;	12 Reporting
					New Sections, 1. Paraesus v5.0 2. User Management	> 13 Contacts
					Updated Sections; 3. Accessing Parnassus 4. Custom Light Messages and Landing Page, 5. Nam Menu, 8. Centre Management, N. Facilitators N. Events	•
	08/08/18	5.1	v5.0 v5.1	Avril Austin- Harvey	User Guide updates to sectors below to incorporate changes in versions VS d and vS.1: 8 Learners Maintenance Added: 8.7.4 Learner search 8.7.5 Existing Learner Updates	ē

This user guide link is now configurable so you can use your own url if required. This link can also be hidden for centre users. Please contact Gordon Associates if you wish to discuss this.



## Version 5 Overview

Parnassus v5.0 is the start of a significant re-investment in the core product, starting with the re-write of the Centre Management screens.

The primary reason for the rewrite is to enable CRM, Workflow and Document Management functionality to be added to Parnassus in the future.

It is envisaged the CRM, Workflow and Document management functionality will give AO's the opportunity to;

- Set up Parnassus workflows that will guide Users through key AOs processes in a clear and simple manner.
- Move to paperless processes where appropriate, through Document Management
- Manage communications with Customers via CRM functionality.

Gordon Associates believe the new "look and feel" and approach in Parnassus will give AO's and their customers a much improved User Experience. We have consulted with our customers during the development of the new version, and via an "Early adopter" programme will continue to build Parnassus to meet customer's needs. We encourage you to provide as much feedback as you can, so we can ensure the improvements deliver true business benefits to you and your customers.

For product information please visit <u>www.parnassusonline.com</u>

### System Overview – What's New?

Parnassus now has a new Governance module. Please contact Gordon Associates for details.

There are new features in the Workflow and Document Management functionality to the Centre area. These are detailed in separate User Guides. Please contact us if you need more information.

Contact details can now be added in bulk. Please talk to us if you require contacts to be added in this way.

## What will change going forward?

The next planned change in Parnassus is the addition

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## 1 Accessing Parnassus

Parnassus is a web based application and can be accessed via an internet browser. Navigate the applications URL and you will be presented with the login page.

## 1.1 Logging into Parnassus

Once you have navigated to the Parnassus system you will be required to log into the system using your User Name and Password.

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E mary particular report of an around				UD M G
This is t	he message that is displayed on the Parnas	sus Login page.		
Put messages	here with general information here that is a	pplicable for all Users.		
As the User	hasn't logged in at this point, the message ca	an't be User specific!		
If you use HTM	L you can format the text in different ways to	make it easier to read.		
	For example, <i>italic</i> or <u>underlined</u> or <b>bo</b>	ld		
	And line breaks too!!			
	0			
	Usemame			
	a			
	60			
	Password			
	*******			
	Remember Username			
	Forgot Password?	og in		
Ver	sion 5.0 beta © Gordon Associates 2002-2017. Powered	By <u>Parnassus</u>		

Figure 1-1 : Login page

- Enter your User Name and Password into the fields and click the 'Log In' button to login.
- Username and Password are case sensitive.
- The login page may have a Welcome Message on it. Also, when you login you will see a post login message, if one has been setup, and you will be directed to the landing page that has been configured for you.
- Set up of the Login message, post login message and landing page is detailed in the following section.

### 1.2 Forgotten Password

In the event you have forgotten your password click on the 'Forgot Password?' link at the bottom of page this will take you to the following page.

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	Forgot Password		
	Enter your username and click submit. We'll then email you a new password.		
	Username		
	Back to Login Dage		
	Submit		
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ve	sion are been to concern a section 2002/2017. Powered by Partia		

Figure 1-2 : Forgotten password page

- Enter your Username in the textbox and click Submit.
- This will reset your password
- If Parnassus is configured to send an email, the email containing your new password will be sent to the email address which was provided when the login credentials were created.

This link can now be hidden if required please contact Gordon Associates to arrange this.



## 2. Customise User Login using Customer Setting Manager

If you login to Parnassus as an Administrator user, you will be able to set up the system Pre-Login Message, Welcome Message and Parnassus Landing Page.

This is done via to the 'Customer Setting Manager' option, as shown in the screen shot below.

	Centres	Learners	Qualifications	Qualification Sets	Units	Certificates	Reporting	Facilitators	Events	Contacts	Admin
Admin											
User Manager Customer Setting Manage Manage Lookup Data Countries & Regions Country Groups	er										

You are then presented with the screen below, where you can configure settings for;

- Login Message
  - a message on the screen where Username and Password are entered.
- Welcome Message - a message specific to User Role displayed when the User logs in
- Parnassus Landing Page.
   A Least Pale specific landing page, the initial page the Liser sees follow
  - a User Role specific landing page, the initial page the User sees following login.

Each of these is described in more detail below.

ceamers quaincations quaincat	tion Sets Units Cert	ificates Reporting	Facilitators	Events	Contacts	Admin
Setting Description The value for this setting will appear i login nerroen Rube // Value Save Double Remember to save your change CIDOCTYPE html> chtml	above the username on the p solutions the second s	parmassus uqin able bhm Hiser bkm it ux				
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## Gordon Associates

## 2.1 Login Message

The Login Message displays on the screen where Username and Password are entered. Configure the message via Customer Setting Manager using the Login Message setting. The message can be in plain text or for more sophisticated messages, including bold, italics, different sizes, images, hyperlinks, you can use HTML.

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	Centres	Learners	Qualifications	Qualification Sets	Units	Certificates	Reporting	Facilitators	Events	Contacts	GA Admin	Admi
stomer Settings												
ing												
in Message Icome Message nassus Landing Page		The value	for this setting :	will appear above the	username d	on the parmassus						
		Role At	een.									
		Value		an 163 055								
		Save L	html>	ave your changes before char	iging role or	setting	1 <sup>2</sup>					
		<html> <body></body></html>					~					
		          	This is the message	e that is displayed on	the Parna	assus Login						
		cp>Put mas	/b>. ssages hare with g	eneral information ber	e that is	applicable						
		5	aela*									
		As the specific!	σser hasn't logge	d in at this point, th	e nessage	can't be User						
		cp>If you	use HTML you can i	format the text in dif	ferent way	ys to make it						
		for es	xample, <i>italic -</i>	or <a>underlined</a>	/12> or @2	>bcld						
		<i><u></u></i>	<pre>cb&gt;And line breaks</pre>	too!!								
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# Gordon Associates

### 2.2 Welcome Message

A post login User role specific Welcome Message can be set using the Custom Setting Manager, via the Welcome Message option. The message can be in plain text or for more sophisticated messages, including bold, italics, different sizes, images, hyperlinks, you can use HTML.



- A single post login message can be set for All roles, or if you prefer a message per User role.
- When Users are in multiple User roles a single post login message is displayed. The
  message displayed is the message for the role with the highest priority.
  Example; User in Admin and User roles. Admin Priority 1, User Priority as 2, the
  Admin message is displayed.

G	Hitp://parnassus/Pegaeur	/Menu/Openii 🔎	• O Permassus	C.	× 7 8					ଅ × ଲିହ©©
11	Centres	Learners 0	wallneations	Qualification S	ets Units Certificates Reportin	e Facilitators	Events	Contects GA Agmin	Aamin	Log Out ga
Quelifi	cations	Welcor	me!							Ê
Juin No	w Cipy (synthesis) CIN	<u>Welcome to</u> <u>This is an e</u> The messaj The messaj	o Parnassus example Welcor ge can be set for ge is set via Cust	ne message for r All users or spe tom Setting Mar	All Users. crific user roles. Jager using the Welcome Message Setting				Standatory	a./
0	ж								D	
0	*	-	_	_		_	_	_		
0	н	CT2		None	Contra Test 2			Approved	D	
0	×	cr -	5.112	None	Centres Test Qual			Approved		

## Gordon Associates

## 2.3 Parnassus Landing Page

The initial page a User sees can be set via the Parnassus Landing Page option in the Custom Setting Manager.

			anna actinicata	Neporolig	racinidiors	LVEIILS	Contacts	GA Admin	Addit
ner Settings									
ossaga a Missaga ais Landing Pinja	Setting Description This is the initial page a in Role Adrem Value Seen Remember to save your to -inertradathermens/initianress and	will be directed to the second	to once they have logge	*					

- The lading page can be set for All roles, or if you prefer per User role.
- When Users are in multiple User roles, use the Priority setting to determine which landing page is displayed. The landing page for the role with the highest priority is used.

Example; User in Admin and User roles. Admin Priority 1, User Priority as 2, the Admin landing page is displayed.

1	ľ	Centres	Learners Qualifications	Qualification Sets U	nits Certificates	Reporting Fac	ilitators Events	s Contacts Admin
sam	iers							
Add (	lew	Registration Upload	Achievement Upload Guick Grade Entry	Request Full Certificales	Registration Card Batches	Pending Alt Achievemen	ta	
			Sear	zh 📃	(	Number +		
			Cent	e Select Centre		~	]	
			Sito	Please select a l	Centre			
				Advanced Search	Options	Soarch		
		Number	First Name	Last Name	Ge	nder	DOB	Created
>	Ħ	134396	Malt an lost	mett as test	Ma	0	01/01/1991	23/08/2017 10:10:32
>	ĸ	134395	acron	gios	Mai	e	15/10/1979	15/08/2017 09:18:36
>	*	134394	wheres	mapathway	Fen	nale	21/06/1988	31/07/2017 09:59:22
D	H	134393	Early	Assess	Mal	•	23/04/1988	27/07/2017 11:55:32
>	н	134302	regdate	quickgrade	Mai		22/05/1988	27/07/2017 11 14:27
0	x	134391	Mitchell	Rood	Fen	nale	01/01/1980	20/07/2017 16:58:07
0	ж	134390	Roger	Cartwright	Ma		05/05/1977	20/07/2017 12:38:32
D	H	134389	Katy	Clever	Fen	nale	05/05/1977	20/07/2017 12:38:32
>	*	134388	Ron	Dadoo	Mai		07/09/1980	20/07/2017 12:17:59
2	38	134387	May	Spring	Fer	nuie	04/08/1980	20/07/2017 12:17:59

• If no landing page is set up the default is the List Centres page.

## Gordon Associates

## 3. User Management

Only Admin Users have access to the User Manager, the User Manager is accessed via the Admin Menu.



3.1 Add New User

Click "User Manager" on the screen above, to open the initial screen below which shows a list of Parnassus users.

The Add User button opens the series of screens as below to set up Parnassus users.

User Manager					
kul User					
TestUser01 Search					
Username	Email	Last Login Date			
S TostUser01	gordon@gordonassociatos.co.uk	01/09/2017 11:46:54			

### 3.2 Enter Key User Data

User Manager		
Add User		
User Name		
E-mail:		
Password (Optional)		
Associated Centre	None	$\checkmark$
	Create User	Cancel

- Users fall broadly into two categories; AO users and Centre users.
- Associated Centre should only be filled in for Centre Users.
- Choose the Centre that the Centre User works at. The Centre User will only see data related to the centre they are associated with.

#### 3.3 Set User Role

- Parnassus has "out of the box" User roles, these are summarised in the table on the following page.
- The standard roles are generally customised for each customer when Parnassus is set up for them.
- The screen below is used to set the Role for the User. At least one user role must be ticked. Multiple user roles can be ticked.

Use	er Manager
	Admin
	Centres
	Examiner
	Learner_Grades
Roles	Learner_Registration
	ReportUser
	Supervisor
	Teacher
	Users
	Users RO
	Finish Cancel

• Key Point - Centre Users must ALWAYS have the Centres role ticked.

Out of the box Parnassus Roles

User Role	Functionality	Comments
Admin	<ol> <li>1: Can Delete Learner</li> <li>2: Can Add Qualifications\Units</li> <li>3: Can Delete Qualification\Units</li> <li>4: Can Delete Qualification</li> <li>Registrations</li> <li>5: Can edit Registration Date</li> <li>6: Can manage users</li> </ol>	1: Data is never deleted but marked as deleted.
Centres	1: Can See List of Sites 2: Can See List of Qualifications Offered 3: List of Learners registered with all Centre Sites 4: View Registrations 5: Can Bulk Add Learners (file import and edit\add) 6: Can Quick Grade Entry 7: Can Bulk Add Grades (file import and edit\add) 8: Can Create Import Batch from Quick Grade Entry (so they have a batch\file reference)	Can see Centre reports: Centre registrations Learner Achievements Re-Enrolment Report
EV	View/Approve Achievement Files Request Qualification Certificates	Can see EV Reports: EV Learner registrations EV Learner Registrations Units only
Supervisor	<ol> <li>1: Can Delete Learner</li> <li>2: Can Add Qualifications\Units</li> <li>3: Can Delete Qualification\Units</li> <li>4: Can Delete Qualification</li> <li>Registrations</li> <li>5: Can edit Registration Date</li> <li>6: No access to User Manager</li> </ol>	1: Data is never deleted but marked as deleted.
Users	1: Can undertake all Learner setup functionality 2: Can undertake all Learner Qualification Registration functionality 3: Can undertake all Certification functionality 4: Cannot undertake any Qualification \ Unit setup functionality 5: Cannot delete any Data 6: No access to User Manager	1: Cannot be in this Role and in Users RO
Users RO	<ol> <li>1: Can see all aspects of data but cannot undertake any action within the system. i.e. register a Learner, Create a Certificate.</li> <li>2: No access to User Manager</li> </ol>	1: Cannot be in this Role and in Users

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Centre User Manager	1: Can manage centre's own users	1. Must also be a Centre User

## 3.4 Confirmation of User Account Creation

User Manag	jer
The account has	Complete been successfully created.
Username: Password: Cont	TestUser03 TestUser03

Clciking continue takes you back to the screen that lists all the Users.

### 3.5 Edit/Maintain Current Users

User Manager							
Add User	Add User						
TestUser01	Search						
Username	Email	Last Login Date					
TestUser01	gordon@gordonassociates.co.uk	01/09/2017 11:46:54					

Once Users are created you can maintain their details by clicking the icon at the left on the row, which opens the User Manager screen, as below.

## 3.6 Disabling Users

You can disable a user record which means the user can no longer login to Parnassus. The user details will still be present but access to Parnassus will be removed for that user. The user can be 'enabled' again if required.

Jser Name:	24473	Creation:	22/10/2015
ocked Out:	No	Last Activity	09/03/2018
Enabled:	Yes	Last Login:	22/10/2015
Doline	False		
Comment:			
	VpassLourseValidation Centres CentreServiceLayer EV Examiner		
	ExamsPowerUser ExamsUser Finance ISTDUser QAPowerUser	Accordance Contact	
	ExamsHowerUser ExamsUser Finance ISTDUser QAUser QAUser Supervisor Teacher	Associated Contact: Associated Centre:	None JGTest One

### 3.7 Deleting Users

Jser Name:	AvrilAdmin	Creation:	05/02/2019
Locked Out:	No	Last Activity	04/03/2019
Online	False	Last Login:	04/03/2019
Comment:			
Roles:	Admin BypassCourseValidation Centres EV Examiner ExamsPowerUser Finance ISTDUser QAPowerUser		
	QAUser Supervisor	Associated Contact:	None
	Teacher	Associated Centre:	None

To delete Use the delete button on the User manager screen, as below

This hard deletes the User record from the database so details of the user email address and any comments in the user record will be lost.

The username and modified date in the audit screens and also against the registration and grade files and certificate batches will still be present.

Note: You cannot delete an EV user where they have existing Site or Qualification associations those will need to be removed first using the EV Manager (see section 15).

#### 3.8 Centre User Manager

You can now allow certain Centre Users to manage their own Centre Users. **Please speak to us if you would like to use this feature.** 

#### Allow Centre User to manage Centre Users

Only Admin can assign a Centre User the role of Centre User Manager. This is found in the Admin  $\rightarrow$  User Manager for the particular Centre user and the role is ticked in the example below as well as the Centre User role.

## User Manager

	U		
Jser Name:	centre1442	Created:	26/04/2021
ocked Out:	No	Last Activity	29/11/2021
nabled:	Yes	Last Login:	29/11/2021
Inline	False		
omment:			
Roles:	Admin BypassCourseValidation Centres CentreServiceLayer CentreUserManager EV Examiner Examiner ExamoneProved Iser	Associated Contact:	None
	ExamsUser Finance ISTDUser QAPowerUser QAUser Supervisor Teacher Users	Associated Centre:	Excellence Centre
Edit User	Close Reset Password	Delete Disable User	

When the centre user has this role ticked then they can see the Centre Admin menu as below.

Centres	Learners	Certificates 👻	Reporting	Centre Admin 👻	Events
				User Manager	

They will then be able to use their own User Manager screen where they can view, add, edit or search for their users.

Centre User Manag	er		
Search			
Username	Email	Last Login Date	Roles
O avev	avrili@gordonassociates.co.uk	27/04/2021 15:09:53	Centres .EV
S centre1442	avril@gordonassociates.co.uk	30/11/2021 10:32:20	Centres (CentreUserManager
PR Centre 1442	paul@gordonassociates.co.uk	29/04/2021 08:03:07	Centres
O vtcttest	stacey.o'nelli@gordonassociates.co.uk	04/05/2021 10:14:39	Centres

## They can add a user as below

Centre User Manager

User Name	Katel	
Emailt	kateU@centre1442.co,uk	
Pessword (Optione	r I	
Associated Centre	Excellence Centre: 1442	*

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When they have clicked the Create User button they will see the user is assigned a centre role and they can either finish and save the new user or cancel adding the user.

Centre User	Manager
Roles	

The options the centre user manager can use to edit a centre user are shown on the screenshot below.

#### Centre User Manager

					lest Centre with ECertificate
			Associat	ed Centre:	e e ure a
oles:	Centres	l.	Associat	ed Contact:	None
omment:					
)nline	True				
nabled:	Yes		Last Login:		13/01/2022
ock <mark>ed</mark> Out:	No		Last Activity		13/01/2022
lser Name:	avuser		Created		13/01/2022

Edit User Edit the centre user details – will open a new screen as below where the centre user's password can be changed and specified, their email address can be changed and a comment can be added or updated.

### Centre User Manager

User Name	avuser	Associated Centre	Test Centre with ECertificate:1453	*
Email	avril@gordonassociates.co.uk	Associated Contact	None	*)
Reset Password To		Associated Sites		
Comment		Roles*	Centres	
Update User Ca	ncel			



Resets the centre user password to a internally generated password – this is displayed on the screen.

### out User Logout the user

**Delete** This hard deletes the User record from the database so details of the user email address and any comments in the user record will be lost. The username and modified date in the audit screens and also against the registration and grade files and certificate batches will still be present.

Disable User

This will disable the user account so they cannot login but will not remove the user details.

## 4. Overview of Main Menu

Once you have successfully logged into the system you will be presented with the following page, this allows access to the various areas of the Parnassus application.

0	DL	http://pamassus/f	egasus/Menu/Open?&	fenuid=79b98ddb-bba	1-e611-8a26-00155d0372	201	,Ø + Ĉ   _Parr	assus	*	e			*	ଟ × ଜୁଜୁ®୍
1	11	Centr		Qualifications	Qualification Sets			Reporting		Events		GA Admin		
Learr	iers													
Add	kw.	Registration Opticial	Adiaovament Uplos	d Quick Grade Entry	Request Full Certificates	s Registra	ton Card Balches	Prending All Ach	www.mants					
				Searc	n [			Numbor	•					
				Centr	e Select Gentre	e			~					
				Sito	Please selé	ect a Centre		_	*					
					Advanced Se	arch Options			Soundi					
		Number	First N	lame	Last Name		Gn	nder	DOB		Cr	eated		
0	Ħ	134396	Matt aa	test	matt aa tost		Mak		01/01/1	991	23/	05/2017 10 10 32		
0	H	134395	9000		glos		Mak		15/10/1	979	.157	08/2017 09 18 36		
0	*	134394	wheres		mapathway		Ferr	ale	21/06/1	888	31/	07/2017 09:59:22		
0	22	134393	Early		Assosa		Mak		23/04/1	960	27/	07/2017 11 55 32		
0	*	134382	regdate		quickgrade		Mak	i.	22/05/1	988	27/	07/2017 11 14 27		
0	22	134391	Milohell		Rood		Fer	alo	01/01/1	980	200	07/2017 16.58.07		
0	×	134390	Roger		Cartwright		Mak	í.	05/05/1	977	207	07/2017 12 38 32		
0	24	134389	Kaly		Clever		For	alo	05/05/1	977	20/	07/2017 12 38 32		
0	*	134388	Ron		Dadoo		Mak		07/09/1	980	200	07/2017 12:17:59		
0	Ħ	134387	May		Spring		Ferr	alo	04/08/1	980	20/	07/2017 12:17:59		
							2 3 4 5							
inter//		mai			Version 5.0 b	eta O Gordo	n Associates 2002-	2017. Powered By	Parnaisun					

Figure 4-1 : Initial page after logging in

**Note:** The options available can vary depending on the user role for your login, and the naming of the functionality can be altered depending on the configuration of your *Parnassus application*.

## 4.1 Menu Options Available

Centres	<ul> <li>Centre maintenance, this includes :-</li> <li>Adding, Editing and Deleting Centres</li> <li>Search for Centres</li> <li>Manage Centre Sites</li> <li>Manage Centre Contacts</li> </ul>
Learners	<ul> <li>Learner maintenance, this includes :-</li> <li>Adding, Editing and Deleting Learners</li> <li>Search for Learners</li> <li>Manage Learner Registrations</li> <li>View a Learner's Certificates</li> <li>Enter a Learner's Grades</li> <li>Reprint Certificates</li> <li>Print Duplicate Certificates</li> <li>Add notes for a learner</li> </ul>
Qualifications	<ul> <li>Qualification maintenance;</li> <li>Adding, Editing and Deleting Qualifications</li> <li>Manage Units and their Groups at a Qualification level</li> <li>Manage Pathways</li> <li>Add notes for a qualification</li> </ul>
Qualification Sets	Qualification Set maintenance, from here all functionality for the maintenance of Qualification Sets within Parnassus is carried out.
Units	From here you can manage Units at a global level without the need to go into a Qualification.
Certificates	Manage certification, including creating Batches and printing them off.
Reporting	Access Reports setup within your Parnassus application.
Facilitators	Access Facilitators setup within your Parnassus application. These may be instructors, teachers, assessors or examiners.
Events	The Events area allows you to define courses for a particular qualification, including the location/centre, course dates, facilitators etc.
Contacts	Contact maintenance

## 5. Centre Maintenance

### 5.1 Centres General

Centres are learning providers such as Colleges. In Parnassus the Centre is treated as the administrative centre for the college. Every Centre has to have at least one Site. Sites are like a College campus. Learners are registered at Sites for the Qualifications they do, rather than Centres. Sites have addresses and are approved to deliver Qualifications.

Centres and Sites have statues that allow their use in Parnassus to be managed by the AO.

For additional guidance you can view our video:

Parnassus Quick Start Guide to adding Centres and Sites

### 5.2 Centre & Site Search & Listing Page

On the Main Menu click on the Centres option, this will load the Centre Search screen, shown below;

entre Search		Hide closed centres in	l user Sea	Actions
results found			Sort By Name + A-Z	Add Centre
Site Example 5	itte For User Guide			Your Recent Activity
ite Code 277.001 imail entre Name ixample Centre For Usi	Site Status Pending Address UNITED KINGDOM er Guide	Main Site Yes	Telephone	Centre: Example Centre For User Guide (1277) Pin Strik: Example State Por User Guide (1277.001) Pin Centre: Auto Test Centre: One (Generated by Jackot resting scripts) (9990) Pin Centre: Lable Centre CENTRE
Centre Example C	entre For User Guide			Site: Auto Test One Site One (Generated by 'auto' testing scripts) (9990.001) Pin
entre Code 277 mail	Centre Status Pending Address UNITED KINGDOM	First Approved	Telephone	

Clicking Search with an empty Search box returns all the Centres.

If you are looking for a particular Centre enter this in the Search box, and a filtered list will be displayed.

The Centre Search works on the following fields;

- Centre & Site Code (Exact match)
- Centre & Site Name (Searches for the entered text any win the string

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Wildcarded; Put an asterix \* at the end of the text returns text beginning with the search string.
 Example; "Centre \*" returns "Centre # 3 for User Guide"

Use Sort By and A-Z to sort the list of Centres and Sites as you need.

When you hover over the heading bar with the Centre/Site name it will change colour. Click on this to view the details of the Centre/Site.

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### 5.3 Add Centre

The 'Add Centre' option is only available on the Centre Search screen, so to add a Centre you need to always go back to the initial Centre Search / Listing screen.

Clicking "Add Centre" launches the screen below.

	Centre Name *				
lid Code	UKPRN	UCN	Renewal St	atus	
			New Cr	entre	*
enewal Date	Default Assessment Language *		Risk Rating		
	ENG:English		* Please	Select	÷
entre Status *	First Approved				
Pending	*				
llow eCertification	Allow printed Qualification Cert	ficates			
Groups					
) iroup t	Group 2	Group 3			
Alert Message					
	a shall see this second second second second second				

Mandatory fields are marked with a red asterisk.

Field Name	Purpose	Validation
Centre Code	The system generated centre code, this field is read only	
Centre Name	The centre's name	Mandatory.
Old Code	The old code for this Centre. Use this when the Centre has existed in another system prior to its existence in Parnassus.	
UKPRN	UK Provider Number from the Central Register of Learning Providers (UKRLP).	
UCN	National centre number.	
Renewal Status	For information, data not used anywhere else in the system.	
Renewal Date	For information, data not used anywhere else in the system.	
Default Assessment Language	See "Assessment Language" for Sites. Each Site of a Centre can be set to use the Assessment Language set here.	Mandatory Limited to drop down list values.
Risk Rating	Record any risk rating for the Centre. The list of values is configurable per AO. There is a Standard Parnassus Report "Centre Risk Rating".	Limited to drop down list values
Centre Status	See the table below for <i>Centre Status</i> for details.	Mandatory Limited to drop down list values.

First Approved	The date the centre was first approved.	When the Centre is first approved you must enter an approval date.
Allow eCertification	Manages whether printed eCertificates can be created	Optional – please speak to us if you would like to use this
Allow printed Qualification Certificates	Manages whether printed certificates can be issued	
Groups	The tick boxes to indicate the Groups the centre belongs to. This will appear if you have Centre groups set up for you by GA. Centre Groups are viewable in the report XREP_CentreGroups	
Centre Alert	Message shown on screen for a centre's users	Optional

Options Available from this page

Button	Purpose
Save	<ul> <li>Save the Centre. This takes you to the Centre Home page, that displays the details for that Centre, with the option to perform the following Centre Actions;</li> <li>Edit Centre Details</li> <li>Change Centre Status</li> <li>Change Fee Percentages</li> <li>Add Site</li> <li>The following sections detailing each of these functions.</li> </ul>
Save and Add Site	See the Add Site section for details.
Cancel	Cancel adding the Centre, nothing Saved, and go back to the Centre search page.

### 5.4 Centre Details

### **Centre Home (View Centre)**

Centre Home displays Centre details including any Sites for the Centre. You also have the option to perform Actions on the Centre.

UG2019 Centre01 (13 Sentre Home   Contacts	10) Venues   Centre Notes	Documents				Actions
ntre Code	Centre Status	Old Code	UKPRN	First Approved	UCN	Edit Centre Details Change Centre Status
newal Date a	Approved Date Closed	not supplied Renewal Status New Centre	not supplied Default Assessment Language English	18 Sep 2019 Main Site Telephone not supplied	not supplied	Change Fee Percentages Add Site
in Site Emeil : supplied in Site Address ITED KINGDOM		Main Site Website not supplied			Risk Rating Not Set	View Process Audit Your Recent Activity Centre: PuG331 Centre(1 (310) Pm Centre: Auto Text Centre One (Semenced by Yuter Lewing
ups up 1	Group 2					scriptal (19950) PAn Contact, Tack M-Res (1855) PAn Shat: Can See This (1802:003) PAn Shat: Can See This (1802:003) PAn Shat: Not allowed to see (1302:002) Pan
15						
Stellame 20/07/014 Stee01			She Code 1310.001	Ske Statue Approved		

### **Centre Actions - Edit Centre**

Use the Centre and Site search screen to find the Centre whose details you want to edit, and click on the heading to open the Centre and view it via the Centre Home page, which is shown below.

Centre Home	Contacts   Venues	Centre Notes				Edit Centre Details
Centre Code 277	Centre Status Pending	Old Code not supplied	UKPRN not supplied	First Approved n/a	UCN not supplied	Change Centre Status
Renewal Date 1/a	Date Closed n/a	Renewal Status New Centre	Default Assessment Language	Main Site Telephone not supplied		Add Site
Main Site Email not supplied Main Site Address JNITED KINGDOM		Main Site Website not supplied	Risk Rating Not Set			Your Recent Activity Site: Site UG #5 (1281.001) Pin Centre: Centre UG #4 (1280) Pin Centre: Centre #3 for User Guide (1279 Pin
ites						Centre: Example Centre For User Guide #2 (1278) Pin Centre: Example Centre For User Guide
Ste Name Example Site Fo	or User Guide		Site Code 1277.001	Site Status Pending		(1277) Pin

Use the Edit Centre Details option to open the edit screen.

Once you have updated the Centre details the options on the Edit Centre screen are Save, Cancel and Delete.



### **Centre Actions - Delete Centre**

Use the Centre and Site search screen to find the Centre that you want to delete. Click on the heading to open the Centre and view it via the Centre Home page. Then click on Edit Centre Details.

Centre Home	Contacts Venues	Centre Notes				Edit Centre Details
Centre Code 1277	Centre Status Pending	Old Code not supplied	UKPRN not supplied	First Approved n/a	UCN not supplied	Change Centre Status
Renewal Date 1/a	Date Closed n/a	Renewal Status New Centre	Default Assessment Language English	Main Site Telephone not supplied		Add Site View Process Audit
Aain Site Email tot supplied Main Site Address JNITED KINGDOM		Main Site Website not supplied	Risk Rating Not Set			Your Recent Activity Site: Site UG #5 (1281.001) Pin Centre: Centre UG #4 (1280) Pin Centre: Centre #3 for User Guide (127) Pin
ites			1000 100 100 1			Centre: Example Centre For User Guid #2 (1278) Pin Centre: Example Centre For User Guid
Site Name Example Site Fo	or User Guide		Site Code 1277.001	Site Status Pending		Centre: Example Centre For User Gu (1277) Pin

## The option to Delete a Centre is on the Edit Centre Details screen.

Example Centre For Centre Home   Conta	r User Guide (1277) acts   Venues   Centre Notes			Actions
1002-00				Save
dit Centre				Cancel
entre Code	Centre Name*			Delete
1277	Example Centre For	User Guide		Your Recent Activity
ld Code	UKPRN	UCN	Renewal Status	Site: Site UG #5 (1281.001) Pin
			New Centre	 Centre: Centre UG #4 (1280) Pin
enewal Date	newal Date Default Assessment Language *		Risk Rating	Pin
	ENG:English		Please Select	Centre: Example Centre For User Guide #2 (1278) Pin
				Centre: Example Centre For User Guide

Parnassus will do some checks before a centre is deleted, the main checks are listed below.

Centre deletion is not allowed when;

- A Centre has any contacts against it
- A Centre has any Venue against it

## **Centre Actions – Change Centre Status**

Use the Centre and Site search screen to find the Centre whose Status you want to change. Click on the heading to open the Centre and view it via the Centre Home page, which is shown below.

Status Old Code g not supplied osed Renewal Status New Centre	UKPRN not supplied Default Assessment	First Approved n/a Main Site Telephone	UCN not supplied	Change Centre Status Change Fee Percentages
New Centre	Assessment	Telephone		A MARKAGE AND
	Language English	not supplied		Add Site View Process Audit
Main Site Website not supplied	Risk Rating Not Set			Your Recent Activity Site: Site UG #5 (1281.001) Pin Centre: Centre UG #4 (1280) Pin Centre: Centre #3 for User Guide (1279 Pin
				Centre: Example Centre For User Guide #2 (1278) Pin Centre: Example Centre For User Guide
te		5te Code 1277.001	Site Code Site Status 1277.001 Pending	Site Code Site Status 1277.001 Pending

## Then click on Change Centre Status, which will open the screen below;

Example Centre For User Gu Centre Home   Contacts   Ver	ide (1277) iues   Centre No	otes				Actions		
Jpdate Centre Status						Set to A	pproved	
atus ending	Date Fi	rst Approved	Date Clo	osed		Set to R	ejected	
						Close	1.000000000	
						Your Rece Centre: Exa (1277) Pin Site: Examp (1277.001) Site: Site UI Centre: Cer Pin	nt Activity imple Centre Fo ble Site For User Pin 5 #5 (1281,001) itre UG #4 (128 itre #3 for User	r User Guide Guide Pin O) Pin Guide (1279

Cntd ...

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The available statuses vary depending on the current status of the Centre. The table below lists all the statuses with information. Dependant on the status you chose additional screens prompt for additonal information as indicated below. For all changes the *Reason for Change* is requested and must be completed.

## Centre, Site, Qualification Status Values

Status	Notes	Can register learners at the centre	Can generate certificates for Centre.
Set to Approved	Approval date is requested and is mandatory.	Yes	Yes
Suspend	<ul><li>User is prompted;</li><li>Suspend</li><li>Suspend for Registration</li><li>Suspend for Certification</li></ul>	Yes if not suspended for registration	Yes if not suspended for certification
Withdraw		No	Yes
Record		No	No
Closure			
Remove		Dependant on	Dependant on
Suspensions		status chosen	status chosen
Set to		No	No
Pending			
Set to Rejected		No	No

In Parnassus status can be set for; Centre, Site, Qualification & Qualification Offered.

Parnassus applies the statuses using the following heirachy;

- Centre Status
- Site Status
- Qualification Offered Status

#### Example

If a centre is suspended nothing can be done at that Centre. If Centre and Site are Approved then Status at Qualification offered is used.

**Qualification Status** sits along side this. If a Qualification is suspended this takes precendence – ie if an AO suspends a Qualification then registrations cannot be taken and certificates cannot be printed for any Centre or Site.

**Process Audit** gives user friendly view of Status changes with reasons, see Process Audit section for details.

### **Centre Actions – Change Fee Percentages**

New in v5.1 is the ability to split a registration fee so a percentage is charged at registration and a percentage at certification.

Whilst the menu option and screen are in the core product, a behind the scenes plugin is required per AO to make this work.

If you want to use this feature please talk to Gordon Associates.

Add a fee percentage	×
Fee % at Registration	
Fee % at Certification	
	Cancel Save

### Centre Actions – Add Site

See Add Site section

### 5.5 Centre Contacts

Contacts can occur either at a centre level or at a site and centre level. The actual details of the contact are entered in the same way in both types.

See the Contacts Section for details on how contacts work.

### 5.6 Centre Venues

Centres may have Venues associated with them. A Venue is where the learners may sit an Assessment or Exam.

From Centre Home you can view the Venues associated with the Centre.

Example Centre For User Guide (1277)						Actions	
Centre Home   C	ontacts   Venues   Ce	entre Notes				Edit Centre Details	
Centre Code 1277	Centre Status Withdrawn	Old Code not supplied	UKPRN not supplied	First Approved 31 Aug 2018	UCN not supplied	Change Centre Status	
Renewai Date	Date Closed	Renewal Status	Default Assessment	Main Site Telephone		Change Fee Percentages	
n/a	n/a	New Centre	Language English	not supplied		Add Site	
		12-01-20-020-020-020-020-020-020-020-020	Carried States Store			View Process Audit	
not supplied		not supplied	Not Set			Your Recent Activity	
Main Site Address UNITED KINGDOM						Site: Auto Test Four Site One (9993.001) Pin Centre: Auto Test Centre Four (Generated by 'auto' testing scripts) (9993) Pin	
Sites						Site, Example Centra for User Guide – Site 02 (1277.002) Pin Centra, Example Centre For User (seide (1277)	
Site Name			Site Code	Site Status		Pin	
Example Centre	for User Guide - Site 01		1277.001	Approved		Site: Example Centre for User Guide - Site 01 (1277-001) Pin	
Site Name Example Centre	for User Guide - Site 02		Site Code 1277-002	Site Status Approved		Pinned Activities Site: Example Centre for User Guide - Site 01	
						(1277.901) Unpin	

Use the search option to filter / show Venues that you are interested in.



You can add a New Venue or associate an existing Venue with a Centre.

See the main Venues section for further information on Venues.

enues at this Centre	Add New Venue
Your search criteria did not return any results	Your Recent Activity Site: Auto Test Four Site One (9993.001) Pin Contro: Auto Test Four Site One (9993.001) Pin Site: Example Centre For User Guide - Site 0 (1277.002) Pin Centre: Example Centre for User Guide - Site 0 (1277.001) Pin Pinned Activities Site: Example Centre for User Guide - Site 0 (1277.001) Pin


### 5.7 Centre Notes

From Centre Home you can add Notes for a Centre. You can also attach a document with the Note. And flag the Note as High Priority to highlight it if required.

Example Centre For User Guide (1 entre Home   Contacts   Venues Centre Notes	Add Note ×	Actions Add Note Your Recent Activity Site: Drample Centre for User Guide - Site 01 (1277.001) Bin Site: Example Centre for User Guide - Site 02 (1277.001) Bin
	High Priority File Name (no attachment) Browse	Site: Example Centre for User Guide - Site: Example Centre for User Guide - Site 01 (1277,002) Pin Centre: Example Centre For User Guide (1277,01) Pin Site: Example Site For User Guide (1277,001) Pin Pinned Activities Site: Example Centre for User Guide - Site: Example Centre for User Guide -

For Saved Notes

- If a Document is saved with the Note click the hyperlink to open the document.
- Saved Notes can be deleted
- Notes can have the High Priority flag removed.

Through User permissions and roles the above can be varied for different Users as needed.

xample Centre For User Guide (1277)	Actions
	Add Note
entre Notes	Your Recent Activity
31/08/2018 16:20:46 Mo Example Note for USer Guide with Attachment ExampleDocForUserGuide.txt	Site: Example Centre for User Guide - Site 01 (1277.001) Pin Site: Example Centre for User Guide - Site 02 (1277.002) Pin Site: Example Centre for User Guide - Site 01 (1272.002) Pin
31/08/2018 16:19:57 Mo Example Note for the User Guide	Odified by ga     Centre: Example Centre For User Guide     (1277) Pin     Site: Example Site For User Guide     (1277,001) Pin
	Pinned Activities Site: Example Centre for User Guide - Site 01 (1277.001) Unoin

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### 5.8 Sites

### Site - General

A site is a separate address or location for a Centre. As an example, a college may have three campuses (i.e. sites). All centres must have at least one site. Learners are registered at Sites rather than Centres.

### **Search for Site**

The Search on the initial Centre page finds Sites as well as Centres. Navigate to the Centre Search using the Centres Menu option. As is shown below the top right hand corner of each record found shows if it is a Centre or Site.

Workflows C	ientres Venues Learners	Qualification + Certificates Repo	rting Contacts GA Admin	Admin Ev	rents -
Centre Search		Hide closed centr	es 🖲 user	Search	Actions
5 results found			Sort By Name +	A-Z =	Add Centre
Centre Centre #3 for User	Guide				Your Recent Activity
Centre Code 1279 Email	Centre Status Approved Address	First Approved 31 Aug 2018	Telephone		Site: Example Centre for User Guide - Site 01 (1277.001) Pin Site: Example Centre for User Guide - Site 02 (1277.002) Pin
Site Example Centre for	r User Guide - Site O1				Site: Example Centre for User Guide - Site 01 (1277.002) Pin
Site Code 1277.001 Email centre Name Example Centre For User Guilde	Site Status Approved Address , UNITED KINGDOM	Main Site Yes	Telephone		Centre Example Centre For User Guide (1277) Pin Site: Example Site For User Guide (1277.001) Pin Pinned Activities Site: Example Centre for User Guide - Site 01 (1277.001) Unpin
Centre Example Centre Fo	r User Guide				
Centre Code 1277 Email	Centre Status Withdrawn Address , UNITED KINGDOM	First Approved 31 Aug 2018	Telephone		
Site Example Centre fo	r User Guide - Site 02				
Site Code 1277.002 Email centre Name	Site Status Approved Address , UNITED KINGDOM	Main Site No	Telephone		
Example Centre For User Guide					
		Version 5.1302 Comfon Associates 2002-77	17. Poweren by calleagus		

Choosing a Centre from the Centre search screen opens the Centre screen. The Centre screen lists the Sites for Centre at the bottom of the screen as shown below. The name of the Site is a hyperlink – click this to open the Site Details page.

Example Centre Centre Home   0	e For User Guide (1277 Contacts   Venues   Ce	) ntre Notes 😕			4	Actions Edit Centre Details
Centre Code 1277	Centre Status Withdrawn	Old Code not supplied	UKPRN not supplied	First Approved 31 Aug 2018	UCN not supplied	Change Centre Status Change Fee Percentages
Renewal Date n/a	Date Closed n/a	Renewal Status New Centre	Default Assessment Language English	Main Site Telephone not supplied		Add Site:
Main Site Email not supplied		Main Site Website not supplied	Risk Rating Not Set			View Process Audit Your Recent Activity
Main Site Address UNITED KINGDOM						Site: Example Centre for User Guide - Site 01 (1277.001) Pin Site: Example Centre for User Guide - Site 02 (1277.002) Pin
sites						Site: Example Centre for User Guide - Site 01 (1277.002) Pin
Ste Name Example Centre	for User Guide - Site 01		Stw Code 1277.001	Sile Status Approved		Centre: Example Centre For User Guide (127) Pin Site: Example Site For User Guide (1277-001)
Site Name Example Centre	for User Guide - Site 02		Site Code 1277.002	Site Status Approved		Pin Pinned Activities
						Site: Example Centre for User Guide - Site 01 (1277.001) Unpin

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Alternatively select the Site directly from the search page and open the Site Details page directly.

## Add Site

You can either add a Site when you add a centre or later you can separately add a site to an existing Centre.

When adding a Centre, you will be prompted to add a Site when the Centre is saved. You don't have to add the Site at this stage.

If you want to add a Site to an existing Centre later, this is done via the Centre page. Find the centre that the site will belong to and chose Add Site from the Actions area as per the screen shot below.

Centre Home	Contacts   Venues   Ce	, ntre Notes			1	Edit Cantes Post-lik
Centre Code	Centre Status Withdrawn	Old Code not supplied	UKPRN not supplied	First Approved 31 Aug 2018	UCN not supplied	Change Centre Status
Renewal Date 1/a	Date Closed n/a	Renewal Status New Centre	Default Assessment Language English	Main Site Telephone not supplied		Change Fee Percentages Add Site
dain Site Email lot supplied		Main Site Website not supplied	Risk Rating Not Set			Your Recent Activity
Main Site Address INITED KINGDOM						Site: Example Centre for User Guide - Site 07 (1277.001) Pin Site: Example Centre for User Guide - Site 02
Sites						(1277.002) Pin Ste: Example Centre for User Guide - 5ite 01 (1277.002) Pin
Ste Name Example Centre	for User Guide - Site O1		50s Code 1277.001	Site Status Approved		Centre: Example Centre For User Guide (127 Pin Ster Example Site For User Guide (1277 000)
Sito Name Example Centre	for User Guilde - Site 02		5ite Cede 1277.002	Site Status Approved		Pin Pinned Activities
						Site: Example Centre for User Guide - Site 01 (1277,001) Unpin

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### 5.9 Site Details

## Site Home (View Site)

Clicking the Site on the screen search screen, displays Site details as below.

ten ( )				
Qualifications   Qual	lification Sets   Unit DCS	Site Notes		
Site Status	Function	Site Type	Telephone	Main Site
Approved	Registration	01 - School	not supplied	Yes
	Website		Assessment Language	
zo.uk	not supplied		English	
			Regulator Region	
			not supplied	
Centre Status	Centre Name			
Approved	Excellence Centre			
is for private study	Account Number	AO Category	AO Country	AO Region
No		not supplied	not supplied	not supplied
eCertification Email				
avril@gordonassociat	es.co.uk			
	Qualifications     Qualifications       Site Status     Approved       coulk     Centre Status       Approved     Is for private study       No     eCertification Email       avril@gordonassociat	Qualifications       Qualification Sets       Unit DCS         Site Status       Function         Approved       Registration         website       not supplied         coulk       Centre Name         Approved       Excellence Centre         is for private study       Account Number         No       ecertrification Email         .avril@gordonassociates.co.uk	Qualifications       Qualification Sets       Unit DCS       Site Notes         Site Status       Function       Site Type         Approved       Registration       01 - School         Website	Qualifications       Qualification Sets       Unit DCS       Site Notes         Site Status       Function       Site Type       Telephone         Approved       Registration       01 - School       not supplied         Website       Assessment Language       English         co.uk       not supplied       Regulator Region         Centre Status       Centre Name         Approved       Excellence Centre         Is for private study       Account Number       AO Category       AO Country         No       not supplied       not supplied         ecertrification Email       avril@gordonassociates.co.uk       AD Category       AD Country

Information you can record about a Site is detailed below. The information in the table is in the order the fields are displayed on the Site Details screen.

Field Name	Purpose	Validation
Site Name	The name of the site	Mandatory
Site Code	The system generated site identifier	N/A
Site Status	The status of the site. The status values are the same as for the Centre. Search for Centre Status to see information about this.	Mandatory: must be one of the selectable values
Function	<ul> <li>The purpose of the site, the options will be:</li> <li>Test</li> <li>Registration</li> <li>Registration &amp; Test</li> </ul>	Mandatory: must be one of the selectable values
Site Type	<ul> <li>The type of the site, the options will be:</li> <li>School</li> <li>FE College / Tertiary College</li> <li>Sixth Form College</li> <li>Adult Education Centre</li> <li>University or other HE Centre</li> <li>Private Training Provider</li> <li>Local Government / Central Government / NHS</li> <li>Voluntary Organisation</li> <li>Employer</li> <li>HM Prison / Youth Offenders Institution</li> <li>Armed Forces</li> <li>Overseas Centre</li> <li>Other</li> </ul>	Optional: may be 'None' or one of the selectable values
Telephone	Primary phone number of the site	No Validation

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Main Site	Flag to indicate if this is the main site, only one site per centre can be marked as being the main site. If a site other than the current main site is flagged as being the main site, the current main site will become deactivated as the main site and the new one will take precedence.	N/A
Email	The contact email address for this site	No Validation
Web Site	The web site address for this site	No Validation
Assessment Language	Default Language for Assessment of associated Registrations	Optional
Address (inc Fax)	The physical address of the Site. There is only 1 address per site.	No Validation
Regulator Region	Used for Statutory Ofqual Reports	Optional
Centre Code	Centre code for the Site the centre belongs to.	
Centre Status	Centre Status for the Site the centre belongs to.	
Centre Name	Centre Name for the Site the centre belongs to.	
Mandatory PO	Indicates whether a purchase order is mandatory for registrations. Search the User guide for "Mandatory Purchase Order" for further details.	
Is for private Study	For information only.	
Acc. No.	Identifies the account number in the Third Party accounting system which is to be used for this site.	
AO Category	Customisable list. So an AO can Categorise Sites.	Drop Down List – Customisable per AO
AO Country	Customisable list. So an AO can assign their own Country definition to a Site.	Drop Down List – Customisable per AO
AO Region	Customisable list. So an AO can assign their own Region definition to a Site.	Drop Down List – Customisable per AO
Prevent Direct Import	When Registration Direct Import mode is enabled this field can be used to prevent direct import for a site.	Optional
eCertification email	The email address for the site for the eCertificates to be sent to	Optional
Certification Site name	Allows a site name specified here to be used on certificates	Optional

### 1.3.1.1 Mandatory Purchase Order

If you set mandatory PO as "Yes" for a site then by default validation will be set to check that a Purchase Order Number is present for registration files, achievement files, certificate reissue and transfers. This is a setting in Parnassus and can be switched on or off for registrations, achievements, certificate reissues and transfers – you will need to contact Gordon Associates if you wish the validation to be turned off for any or all of these actions as the validation is on by default. Below are examples of the validation messages you will see for each action:

## Error on Grade Import or Registration Import

	Learner Code	First Name	Middle Name(s)	Last Name	DOB	Qual. Code	Site Code	[Reg. Date]	Reg Group Code	ULN	M/F	Street 1	Stree 2
0		Mandato	iry	PO	07/04/1988	1U (1 Unit)	1076.001	07/02/2017	•		Male		
Total: 1						Error	List						
Valid: 0							1201028						
Invalid: 1						Field	Name	Er	ror Message			Sev	verity
						Dunate	and Order	Desidered Dis	andress Onder M	12 4	1 2	1 2	

## Error on Edit Certificate screen

ertif		
ītle		Grad
Jnit		Pass
Qu		Pass
	Certificate Return Date (If Applicable)	Pass
	Purchase Order	Pass
		Pass
	Create Reprint Create Duplicate Create Replacement	
	Charge Site 🖲 Charge Learner 😳	
_	Purchase Order Number required. Please add a Purchase Order number	:15

### Error on transfer screen

Transfer Regist	Transfer Registration					
From Centre / Site	From Centre / Site 5 Stars Recruitment - 5 Stars Recruitment (C01957.00)					
Centre	Select Centre		٣			
Site	Please select a Centre		Ŧ			
Qualification	Select Site First		¥			
Pathway	Select Qualification First		¥			
Purchase Order						
Transfer Date	29/09/2016	]				
Transfer Close						
Purchase Order num	ber required for transfer. Pleas	e add a Purchase Order num	ber			

## Site Actions - Edit Site

Use the Centre and Site search screen to find the Site whose details you want to edit, and click on the heading to open the Site and view it via the Site Home page, which is shown below.

Alternatively find the Centre and open the Site form the list of Centres displayed at the bottom of the Centre screen.

Site 1 (1442.001) Site Home   Contacts	Qualifications   Quali				
Site Home   Contacts	Qualifications   Quali				
162 M	N 8	fication Sets   Unit DCS	Site Notes		
Site Code	Site Status	Function	Site Type	Telephone	Main Site
1442.001	Approved	Registration	01 - School	not supplied	Yes
Email		Website		Assessment Language	
avril@gordonassociates.co.u	ık	not supplied		English	
Address				Regulator Region	
UNITED KINGDOM				not supplied	
Centre Code	Centre Status	Centre Name			
1442	Approved	Excellence Centre			
Mandatory PO	is for private study	Account Number	AO Category	AO Country	AO Region
No	No		not supplied	not supplied	not supplied
Prevent Direct Registration	eCertification Email				
Import	avril@gordonassociate	is.co.uk			
No	0				
Certificate Site Name					

Use the Edit Site Details option to open the edit screen.

Once you have updated the Site details the options on the Edit Site screen are Save, Cancel and Delete.

Example Centre For User Guide (12) Example Centre for User Guide - Site 01 Site Home   Contacts   Qualifications	77)   (1277.001)   Qualification Sets.   Site Notes			Actions Save
Edit Cita				Cancel
Exat sine				Deele
Site Code	Ste Name *			Your Recent Activity
1277.001	Example Centre for User Guide - Site 01			Centre: Example Centre For User Guide (1277) Pin
Default Assessment Language		Site Function		Centre: Centre #3 for User Guide (1279) Ptn
Use Parents Default	×	Registration *		Centre: Auto Test Centre Four (Generaled by 'auto' testing
SiteType		Embali		scripts) (9993) Pin
D1 - School	*			Remark Arthritist
E. March				The Description Control Provide Control Control (1777) (2011)
Web Site		Acc. No.		Uppin
Regulator Region		Mandatory PD	Is for Private Study	
Not Supplied		0		
		Prevent Registrations Direct Import		
AO Country		AO Region		
Not Supplied	×	Not Supplied	÷.	
AO Category				
Not Supplied				
Address				
Street, 1		Street 2		
Street 3		City/Town		

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## Site actions - Delete Site

Use the Centre and Site search screen to find the Site that you want to delete. Click on the heading to open the Site and view it via the Site Home page. Then click on Edit Site Details.

Excellence Centr	e (1442)						Actions
Site 1 (1442.001) Site Home   Conti	acts   Qualifications   Qualifi	ication Sets   Unit DCS   Site !	votes				Edit Site Details
	1000000000	11-24	In the second			1	Assign Qualifications
Site Code	Site Status	Function	Site Type	Telephone	Main Site		Assign Qualification Sats
1442.001	Approved	Registration	01 - School	not supplied	Yes		resign quantation see
Email		Website		Assessment Language			Change Site Status
avril@gordonassocia	ates.co.uk	not supplied		English			Manuel Barrana Acada
Address				Regulator Region			View Process Addit
UNITED KINGDOM				not supplied			Your Recent Activity
Centre Code	Centre Status	Centre Name					Centre: Excellence Centre (1442) Pin
1442	Approved	Excellence Centre					Site: 5ite 1 (1442.001) Pin

### The option to Delete a Site is on the Edit Site Details screen.

Example Centre For User Guide (1277)		Actions
Example Centre for User Guide - Site 01 (1277,001) Site Home   Contacts   Qualifications   Qualification Sets   Site Notes		Save (
		Cancel
Edit Site		Delete
Site Code Site Name * 1277.001 Example Centre for User Guide - Site 01		Your Recent Activity Centre: Example Centre For User Guide (1277) Pin
Default Assessment Language Use Parents Default -	Site Function *	Centre: Centre #3 for User Guide (1275) PH Contact throng jenkins (334) PM Centre: Auto Test Centre Four (Senerated by Suito' festing school) (XMRD PM
Site Type: 11 - School *	Email	Ster Example Centre for Uter Guide - Ste 01 (1277.001) Pin Pinned Activities
Web Site	ACC, No.	Sites Suample Centre for User Guide - Site 01 (1277.001) Uppin
Regulator Region	Mandatory PO is for Private Study	
AQ Country Not Supplied ~	AD Region Not Supplied -	
AO Category Not supplied *		
Address		
Street 1	Street 2	
Street 3	City/Town	

In order to delete a site it must NOT;

- Be the 'Main Site' (unless it is the only Site).
- Have any contacts against it
- Have any qualifications against it

### Site Actions – Assign Qualifications

Qualifications are assigned to Sites rather than Centres in Parnassus

The screens to do this can be accessed two ways;

1. Via the Qualifications navigation option at the same level as Site Home in the navigation.

See the Site Qualifications section for doing it this way.

Or

2. Via the list of Qualifications Active for Registration on the Site Home screen. See "Search for Site" section for finding your site, and the sections below Assigning Qualification(s).

One you have found your Site click the *Assign Qualification* button on the "Site Home" screen.

Excellence Centr	re (1442)						Actions
Site Home   Cont	acts   Qualifications   Qualifi	cation Sets   Unit DCS   Site N	otes				Edit Site Details
		2				3	Assign Qualifications
Ste Code	Site Status	Function	Site Type	Telephone	Main Site		Assign Qualification Sets
1442.001	Approved	Registration	01 - School	not supplied	Yes		
Email		Website		Assessment Language			Change Site Status
avril@gordonassoci	ates.co.uk	not supplied		English			Minus Desenvert Accelit
Address				Regulator Region			view Process Addit
UNITED KINGDOM				not supplied			Your Recent Activity
Centre Code	Centre Status	Centre Name					Centre: Excellence Centre (1442) Pin
1442	Approved	Excellence Centre					Site: 5ite 1 (1442,001) Pin

The Assign Qualification screen shows a list of all the Qualifications in Parnassus that are currently not assigned to the Site. You can select specific qualifications or you can assign all of the available qualifications to the site.

Excellence Centre (14	42)					Actions
Site Home   Contacts	Qualifications   Qua	Ification Sets   Unit DCS   Site Notes				Assign Selected to Site
Select Qualifications	s to Assign			(1	Search	Assign All to Site Close
Click the qualifications vo	u wish to select and then	dick the Assign action.	Sart By	Name	- AZ -	Your Recent Activity Centre: Excelence Centre (1442) Pin
Showing 3 results				Select/Dese	lect all Qualifications	Sile: Sile 1 (1422.001) Pin Centre: Avril's Centre (1442) Pin Over it: unit liest (222) Pin
Delete Test						Event: cancel withdraw (223) En
Qualification Code DeleteMe	QN	Status Approved				
kjejen						
Qualification Code Intikh	QN	Status Pending				
Matt Optional Unit Qual						
Qualification Code optunit	QN	Status Pending				

Use the Search option to reduce the list of Qualifications and help find qualifications if you need to. The search works on Qualification code and title and is wildcarded automatically.

Select the Qualifications you wish to assign to the site by clicking on the heading to select them. You can select as many qualifications as you like to assign at the same time. If you do a search after selecting Qualifications any selected Qualifications will become unselected. The screen shot below shows the second and third Qualification have been selected to be assigned to the site.

Ity Centre (1344) Ity Centre Site (1344.0)						•	Actions
Ite Home   Contects	Qualifications   Q	uslification Sets   Ste Notes					Assign Selected to Sile
							Assign All to Site
elect Qualifications	to Assign					Search	Clase
				Sort By	Name	A-Z -	Your Recent Activity
lick the qualifications you howing 96 results	wish to select and the	en click the Adsign action.					Star, City Centre Star (1344-001) Fin Central: PU62018 Centre01 (1310) Fin Centre: Auto Tata Centre Cine (Generated by Sauto' teachy acripta) (9950) Fin
1 EE9(*&*();@~<>/);@~[]/3	r, 0) "-						Contact: Test McTest (355) Pin Stor, Can See This (1302-003) Pin
Qualification Code 가요와에스바():중~<>7:중~ 문·박,사) '~	QN	Status Approved					
6756756							
Qualification Code 7567567567	QN	Status Pending					
abrdefyli4abrdefyli7ab	cdefyhi6abcdefyhi7ab	cdefghi&abcde/ghi%abcdefghi?					
Oualitication Code	ON	Status					

When you have selected the Qualifications to be assigned click "Assign Selected to Site" which will open the screen below that captures approval details.

Enter Approval Details	×
All qualifications will be assigned to the site with the values ent select the qualifications individually or in groups that have the	ered below. If you need to assign different values you will need to same values.
Registration Status *	Centre Certificate Image
Please Select *	No Image Found Add Image
Qualification Approved Date	
Direct Claims Status *	
Please Select *	
Direct Claims Status Approved Date	
Direct Claims Status Expiry Date	
Cascade to sibling sites?	
0	
	Close Assign Qualifications

The table below describes the fields on the screen above;

Registration Status	The status of the qualification at	Mandatory: must be one of
	this site, see "Centre, Site,	the selectable values
	Qualification Status Values" for	
	details	

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Qualification Approved Date	The date the qualification was approved to be offered at this site	Optional for Pending Status. Mandatory for Approved Status: must be a valid date
Direct Claim Status (DCS)	The direct claims status of this qualification at this site, the options will be: • Approved • Suspended • Withdrawn This determines whether a site is eligible to claim certificates themselves or if it needs to be claimed on their behalf by an external verifier or similar.	Mandatory. Set to "None" if DCS is not applicable.
DCS status Approved Date	The date the direct claims was approved.	Mandatory when DCS is not "none"
Direct Claim Status	The date of expiry after which the	Optional
Expiry Date	DCS is unavailable.	
Cascade to Sibling	If you want to assign the	Optional
Sites	Qualification(s) to all the Sites at the Centre tick this option.	

## Site Actions – Edit Site Qualification(s)

The screens to Edit Site Qualifications(s) can be opened in two ways;

 Via the Qualifications navigation option at the same level as Site Home in the navigation. See the Site Qualifications section for doing it this way.

Or

 Via the list of Qualifications Active for Registration on the Site Home screen. See "Search for Site" section for finding your site, and the sections below for Editing the Site Qualification(s).

View the Site and find the Qualification you wish to update. Click the Qualification Title hyperlink to view the Qualifications, as per the screen shot below;

Example Centre for User Guide - Site 01 (1277.001)						
Site Home   Contac	ts   Qualifications	Qualification Sets   Site	Notes			
ite Code 277.001	Site Status Approved	Function Registration	Site Type 01 - School	Telepho not sup	ne plied	Main Site Yes
mail ot supplied		Website not supplied		Assessn English	nent Language	
ddress INITED KINGDOM				Regulate not supp	or Region plied	
entre Code 277	Centre Status Withdrawn	Centre Name Example Centre For U	Jser Guide			
fandatory PO lo	Is for private study No	Account Number	AO Category not supplied	AO Cour not supp	ntry piled	AO Region not supplied
revent Direct egistration Import Io						
Qualifications act	ve for registration	(Show all site qualifications)				
Qualification Title Qual for User Guid	e 01 - GH		Qualifica UG01-0	tion Code 5H	Status Approved	
Approval Date 28 Sep 2018	Direct Claims Status Approved					
Qualification Tide Testing Qualificatio	n 1 : NQF - (1 pathway, 2	groups, Pass/Fail - Genera	Qualifica ated by AUTOT	tion Code ESTQUAL1	Status Approved	
"auto" testing script	5)		Approval	Date	Direct Claims St	atus

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Suite G1, Montpellier House, Montpellier Drive, Cheltenham, Gloucestershire GL50 1TY

01242 529820

This will open the Edit Site Qualification Screen as below.

Example Centre For User Guide (1277)	Actions
Example Centre for User Guide - Site 01 (1277.001) Site Home   Contacts   Qualifications   Qualification Sets   Site Notes	Save
	Cancel
Edit Site Qualification	Delete
Site Code 1277.001	View Process Audit
Site Name Example Centre for User Guide - Site 01	Your Recent Activity
Qualification Qual for User Guide 01 - GH	Site: Example Centre for User Guide - Site 02 (1277.002) Pin Centre: Example Centre For User Guide (1277)
Status	Pin Stev Example Centre for User Guide - Ste 01
Approved	* (1277.091) Pin
Qualification Approved Date *	Sile: Auto Test One Sile One (Generated by 'auto' testing scripts) (9990.001) Pin
28/09/2018	Centre: Auto Test Centre One (Generated by South Instance scripps) (9990) Pin
Direct Claims Status	Pinned Activities
Approved	* Site: Example Centre for User Guide - Site 01
Direct Claims Status Approved Date	(1277.001) Unpin
28/09/2018	
Cascade changes to sibling sites that also offer this qualification?	

If you are updating the values, do this and click Save. If you want to delete the assignment click Delete – however you cannot delete a qualification that is part of a qualification set in use at that site.

For both of these options you will be prompted if you want to Cascade the update to all the Sites at the Centre, and asked for a Reason for the change.

User guide examp	le	

The changes, with reason, can be viewed via the Process Audit.



### Site Actions – Assign Qualification Set

Qualification Sets are assigned to Sites rather than Centres in Parnassus

The screens to do this can be accessed two ways;

1. Via the Qualification Set navigation option at the same level as Site Home in the navigation.

See the Site Qualification Sets section for doing it this way.

Or

2. Via the list of *Qualifications Active for Registration* on the Site Home screen. See "Search for Site" section for finding your site, and the sections below Assigning Qualification Set(s).

One you have found your Site click the Assign Qualification Set button on the "Site Home" screen.

Example Centre Fo Example Centre for Site Home   Contac	or User Guide (1277) User Guide - Site 01 (12 ts   Qualifications   Q	77.001) Walification Sets   Site	Notes			4	Actions Edit Site Details
te Code 277.001 mail	Site Status Approved	Function Registration Website	Site Type 01 - Schoo	Telepho not sup Assessi	ne plied nent Language	Main Site Yes	Assign Qualifications Assign Qualification Sets Change Site Status
ot supplied ddress NITED KINGDOM		not supplied		English Regulat not sup	or Region plied		View Process Audit Your Recent Activity
entre Code 277 Iandatory PO 0	Centre Status Withdrawn Is for private study No	Centre Name Example Centre For U Account Number	Iser Guide AO Catego not suppli	ory AO Cou ed not sup	ntry	AO Region not supplied	Site: Example Centre for User Guide - Site 01 (1277.001) Poi Site: Example Centre for User Guide - Site 02 (1277.002) Poi
revent Direct egistration Import. 0							Site: Example Centre for User Guide - Site () (1277.002) Pin Centre: Example Centre for User Guide (1277) Pin Site: Example Site For User Guide (1277.001)
ualifications acti	ve for registration (s	how all site qualifications)					Pin Pinned Activities
Qualification (itie Testing Qualificatio (esting scripts)	o 1 : NQE - (1 pathway, 2 g	roups, Pass/Fail - Genera	ted by 'auto'	Qualification Code AUTOTESTQUAL1 Approval Date 31 Aug 2018	Status Approved Direct Caims St Suspended	tatus -	Site: Example Centre for User Guide - Site 01 (1277.001) Unpin

The Assign Qualification Set screen shows a list of all the Qualifications in Parnassus that are currently not assigned to the Site.

Example Centre For User Guide (1277)		Actions
Example Centre for User Guide - Site 01 (1277.001) Site Home   Contacts   Oualifications   <b>Oualification Sets</b>   Site Notes		Assign Selected to Site
		Oese
Search For Qualifications Sets to Assign	Search	Your Recent Activity
	Sort By Name = A-Z =	Centre: Example Centre for User Guide - Site 02 (1277.002) Pin Centre: Example Centre For User Guide (127
Click the qualification sets you wish to select and then click the Assign action		Pin
Showing 4 results		(1277.001) Pin
Auto Test Qualification Set 001		Site: Auto Test One Site One (Generated by Jauro' testing scripts) (9990.001) Pro Centre: Auto Test Centre One (Generated by
Code		'auto' testing scripts) (9990) Pin
Auto rest qualseruo i		Pinned Activities
Qual Set 1		Site: Example Centre for User Guide - Site 01 (1277.001) Unper
Code		
Q51		
Qual Set 2		
Code		
052		
Qualification Set For User Guide 01		
Code qSFUG01		

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Use the Search opition to reduce the list of Qualification Sets and help find Qualification Sets if you need to. The search works on Qualification Set code and Title, and is wildcarded automatically.

Select the Qualification Sets you wish to assign to the site by clicking on the heading to select them. You can select as many qualifications as you like to assign at the same time. If you do a search after selecting Qualification Set any selected Qualification Sets will become unselected. The screen shot below shows the fourth Qualification Set has been selected to be assigned to the Site.

Lating Centre for Ouse Guide - Site Voirs       Assign Selected to Site         Site Home   Contacts   Qualifications   Qualification Sets   Site Notes       Search         Search For Qualifications Sets to       Search         Assign       Sort By         Sort By       Name *         A-Z *       (1277 002) Fin         Click the qualification sets you wish to select and then click the Assign action       Sort By         Showing 4 results       And Test Qualification Set 001         Code       State Construction Set Sort By	
Search For Qualifications Sets to     Search       Assign     Sort By       Sort By     Name       Active     Code       Statistic Example Centre for User Guide - 5 (1277 007) Fin       Click the qualification sets you wish to select and then click the Assign action       Showing 4 results       Auto Test Qualification 5et 001       Code	
Search For Qualifications Sets to Assign Sort By Name A.Z. * Cilck the qualification sets you wish to select and then cilck the Assign action Showing 4 results Auto Test Qualification Set 001 Code Your Recent Activity Sort By Name A.Z. * Code Your Recent Activity Stret Example Centre for User Guide - (1277.001) Fin Stret Example Centre for User Gui	
Sort By Name         A.Z.*         (1272.022) Fin           Click the qualification sets you wish to select and then click the Assign action         Sort By Name         A.Z.*           Showing 4 results         Click the qualification sets you wish to select and then click the Assign action         Sin           Auto Test Qualification Set 001         Site: Sumple Centre for User Guide-S         Site: Sumple Centre for User Guide-S           Code         Code         Contract Code         Contract Code Site: Code Si	- 5ite (37
Click the qualification sets you wish to select and then click the Assign action Showing 4 results Site: Example Centre for User Guide - 5 (1277 2011) Pin (1277 2011) Pin (1278 2011) Pin (12	de (1277)
Auto Test Qualification Set 001 Site: Auto Test One Site One (Site random Code Code Code Code Code Code Code Code	Site 01
Code Code Code Code Code Code Code Code	ted by
AutoTestQualset001 Plined Activities	ated by
Qual Set 1 Site: Example Centre far User Guide - S (1277/2011 Urgin	Site 01
Code QST	
Qual Set 2	
Code Q52	
Qualification Set For User Guide 01	
Code QSFUG01	

When you have selected all the Qualification Sets to be assigned click "Assign Selected to Site" which will open the screen below that captures approval details.

Enter Approval Details	×
All qualification sets will be assigned to the site with the values entered below. If you need to assign different values you will need to select the qualification sets individually or in groups that have the same values.	
Registration Status *	
Please Select	1
Approved Date	
Cascade changes to sibling sites?	
Charged at Registration Time	
Charged at Certification Time	
Close Assign Qualification Se	ets

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Registration Status	The status of the qualification set at this site, see " <i>Centre, Site,</i> <i>Qualification Status Values</i> " for details	Mandatory: must be one of the selectable values
Approved Date	The date the qualification was approved to be offered at this site	Mandatory: must be a valid date
Cascade to Sibling Sites	If you want to assign the Qualification Set(s) to all the Sites at the Centre tick this option.	
Charged at Registration Time	For installations that use the Link To Finance module, HERMES, this options determines when the fee is raised.	Whilst the menu option and screen are in the core product, a behind the scenes plugin is required per AO to make this work.
	A percentage of the fee can be raised at Registration and a percentage at Certification.	If you want to use this feature please talk to Gordon Associates
Charged at Certification Time	For installations that use the Link To Finance module, HERMES, this options determines when the fee is raised.	Whilst the menu option and screen are in the core product, a behind the scenes plugin is required per AO to make this work.
	A percentage of the fee can be raised at Registration and a percentage at Certification.	If you want to use this feature please talk to Gordon Associates

The table below describes the fields on the screen above;

Site Actions – Edit Site Qualification Set See the section Site Qualification Sets

### Site Actions – Change Site Status

To change the Site Status open the Site Home screen for the Site you want to change the Status for. See section *Search for Site* on finding a Site as needed.

Once you have found your Site the *Change Site Status* option can be found in the Action area.

Example Centre Fo Example Centre for	or User Guide (1277) User Guide - Site 01 (12	77.001)					Actions
Site Home   Contac	s   Qualifications   G		Notes				Edit Site Details
ite Code 277.001	Site Status Approved	Function Registration	Site Type 01 - Schoo	Telepho a not sup	ne plied	Main Site Yes	Assign Qualifications Assign Qualification Sets Channes Ello Skolur
mail ot supplied		Website not supplied		Assess English	sent Language		View Process Audit
NITED KINGDOM entre Code 277	Centre Status Withdrawn	Centre Name Example Centre For U	Jser Guide	not sup	plied		Your Recent Activity Site: Example Centre for User Guide - Site 01 (1277.001) Pin
landatory PO Io revent Direct legistration Import io	is for private study. No	Account Number	AO Catego not suppli	ry AO Cou ed not sup	ntry offed	AO Region not supplied	Site: Example Centre for User Guide - Site 02 (1277.002) Pin Site: Example Centre for User Guide - Site 01 (1277.003) Pin Centre Example Centre For User Guide (1277 Pin Site: Example Site For User Guide (1277.001)
ualifications acti	ve for registration (s	Now all site qualifications)					Pin Pinned Activities
Qualification Tile Testing Qualificatio testing scripts)	n 1 : NQF - (1 pathway, 2 g	roups, Pass/Fail - Genera	ited by 'auto'	Qualification Code AUTOTESTQUAL1 Approval Date 21. Aug. 2018	Status Approved Direct Claims St	ünus .	Site: Example Centre for User Guide - Site 01 (1277.001) Unpin

Clicking the opton Change Site Status opens the screen below. The available Status options are shown in the the Action area on the right hand side of the screen. The current status determines the Status options that are displayed on screen.

Example Centre for User Guide - Site 01 (1277.001)	4
Site Home   Contacts   Qualifications   Qualification Sets   Site Notes	Set to Approved
Undata Site Statue	Suspend
apuare are alacus	Withdraw
status approved	Record Closure
	Set to Pending
	Close
	Your Recent Activity
	Centre: Auto Test Centre Four (Generated by auto' treating scorpts) (9938) Pin Streib Zample Centre for User Guide - Site 02 (1277.002) Pin Centre: Example Centre For User Guide (127 Pin Site: Example Centre for User Guide - Site 01 (1277.001) Pin Site: Auto Test One Site One (Generated by auto' testing scorpt) (993.001) Pin
	Pinned Activities Site: Stample Centre for User Guide - Site 01 (1277.001) Unpin

You will be prompted for valous information depending on the status you are setting. All changes prompt for the reason for change. The history of changes can be viewed via the *Process Audit.* 

The Close option closes the screen rather than closing the Site!

#### **Site Contacts**

Centre and Site Contact Functionality works in the same way for Centres and Sites.

See the Contacts Section for details on how contacts work.

### Site Qualifications

The Site Qualification screen lists the Qualifications assigned to the Site.

Use the Search opition to reduce the list of Qualifications and help find Qualifications if you need to. The search works on Qualification code and Title, and is wildcarded automatically.

Use Assign Additonal Qualifications to add more Qualifications to the Site.

If you want to edit an existing qualification assignment Click the Qualification to be edited and use the screens as described in section *Site Actions – Edit Site Qualification(s)*.

ite Home   Contact	s   Qualifications	Qualification Sets	Site Notes					Assign Additional Qualifications
Site Qualifications	10			Sort By	 Name	Sear A-Z	rch	Your Recent Activity Centre: Auto Test Centre Four (Generated by "auto" testing scripts) (9992) Pin Sitte: Example Centre for User Guide - Site 02
ihowing 4 results								(1277.002) Pin Centre: Example Centre For User Guide (127 Pin
Qual for User Guide 0	11 - GH							Site: Example Centre for User Guide - Site 01 (1277.001) Pin
Qualification Code UG01-GH	QN	Status Approved	Direct Claims Status Approved	Appro 28.Sej	val Date 2018			Site: Auto Test One Site One (Generated by 'auto' testing scripts) (9990.001) Pin Pioned Activities
Testing Qualification	1 : NQF - (1 pathway,	2 groups, Pass/Fail - Ger	erated by 'auto' testing scrip	LS)				Site: Example Centre for User Guide - Site 01
Qualification Code AUTOTESTQUAL1	QN 500/6804/0	Status Approved	Direct Claims Status Suspended	Appro 31 Au	val Date g 2018			(1277.001) Unpin
Testing Qualification	4 : QCF - (2 pathway. :	2 groups, ABCD - Genera	ted by 'auto' testing scripts)					
Qualification Code AUTOTESTQUAL4	QN	Status Approved	Direct Claims Status None	Appro 21 Sej	val Date 0 2018			
Testing Qualification	6 : QCF with Elements	- (Generated by 'auto' t	esting scripts)					
Qualification Code	QN	Status	Direct Claims Status	Appro 21 Set	val Date			

### Site QualificationSets

The Site Qualification Set screen lists the Qualification Sets assigned to the Site.

Use the Search opition to reduce the list of Qualification Sets and help find Qualification Sets if you need to. The search works on Qualification Set code and Title, and is wildcarded automatically.

Use Assign Additonal Qualifications to add more Qualifications to the Site.

Example Centre F Example Centre for Site Home   Conta	or User Guide (1277) User Guide - Site 01 (1277.001) cts   Qualifications   <b>Qualification Sets</b>   Site	Notes	4	Actions Assign Additional Qualification Sets
Site Qualificatio	n Sets	[]	Search	Your Recent Activity Centre: Auto Test Centre Four
Showing 1 results		Sort By Name -	A-Z -	(Generated by 'auto' testing scripts) (9993) Pin Site: Example Centre for User Guide - Site 02 (2272-022) Pin
Qualification Set Fo	r User Guide 01			Centre: Example Centre For User Guide (1277) Pin
Code QSFUG01	Status Approved			Site: Example Centre for User Guide - Site 01 (1277.001) Pin Site: Auto Test One Site One (Generated by 'auto' testing scripts) (9990.001) Pin
				Pinned Activities Site: Example Centre for User Guide - Site 01 (1277.001) Unpin

If you want to edit an existing Qualification Set assignment, find the Qualification Set to be edited on the Site Qualification set screen. Click the title which will open the Edit screen below. Follow the on screen prompts and Save, or Cancel. Delete removes the Qualification Set assignment for the Site.

Example Centre For User Guide (1277)	Actions
Example Centre for User Guide - Site 01 (1277.001)	
Site Home   Contacts   Qualifications   Qualification Sets   Site Notes	Save
	Cancel
Edit Site Qualification Set	Delete
Site Code	View Process Audit
Site Name	new process mode
Example Centre for User Guide - Site 01	Your Recent Activity
Qualification Set	Centre: Auto Test Centre Four
Qualification Set For User Guide 01	(Generated by 'auto' testing scripts
	(9993) Pin
Status	Site: Example Centre for User Guid
Approved	- Site 02 (1277.002) Pin
	Centre: Example Centre For User
Approved Date *	Guide (1277) Pin
28/09/2018	Site: Example Centre for User Guid
	- Site 01 (1277.001) Pin
Charged at Registration Time	Site: Auto Test One Site One
8	(Generated by auto testing scripts
Charged at Certification Time	13330,0011-01
	Pinned Activities
An ender sterne sternike site en sterne sterne state sterne state sterne state	Site: Example Centre for User Guid
cascade changes to siding sites that also offer this qualification set?	- Site 01 (1277.001) Unpin

## Gordon Associates

### 5.10 Site Notes

Site Notes are added and edited in the same way as Centre Notes. Find the Site you want to add a Note for and use the Site Notes menu option to view the notes. See the Centre Notes section for how to manage Notes.

	Workflows	Centres	Venues	Learners	Qualification 👻	Certificates
Example Cen Example Centr Site Home   C	tre For User re for User G Contacts   Q	r Guide (1) uide - Site pualification	277) 01 (1277.0 s   Qualif	01) ication Sets	Site Notes	

## Gordon Associates

## 5.11 Process Audit

Process Audit is a user friendly view of changes for;

- Centre Status
- Centre Risk Rating
- Site Status
- Qualification Status
- Qualification Offered Status
- Qualification Set Assignment

The data on screen can be Exported to Excel in case it is needed for Regulatory reporting purposes.

Process Audit Example Centre for User Guide - Site	01		×
Site Status Changed			*
Occured On 31/08/2018 15:51:02 Actioned By ga Reason Example for the User Guide	Property Changes <ul> <li>Status changed from Pending to Approved</li> </ul>		
Site Status Changed			
Occured On 28/08/2018 17:47:17 Actioned By ga Reason Site added to system	Property Changes  • Status set to Pending		
			÷
		Export to Excel	Close

## Gordon Associates

When status changes have been made the View Process Audit button is visible, as per screenshot below. The Process Audit screen shows the Audit data relevant to the screen it is opened from ie Centre screen process audit shows only changes for Centre.

Example Centr Centre Home	e For User Guide (1 Contacts   Venues	277) Centre Notes			4	Actions Edit Centre Details		
Centre Code 1277	Centre Status Withdrawn	Old Code not supplied	UKPRN not supplied	First Approved 31 Aug 2018	UCN not supplied	Change Centre Status		
Renewal Date 9/a	Date Closed ri/a	Renewal Status New Centre	Default Assessment Language English	Main Site Telephone not supplied		Change Fee Percentages Add Site		
Main Site Email not supplied Main Site Address UNITED KINGDOM	i.	Main Site Website not supplied	Risk Rating Not Set			Your Recent Activity Site: Example Centre for User Guide - Site 01 (1277.001) Pin Site: Example Centre for User Guide - Site 02 (1277.002) Pin		
Sites Site Name			Site Code	Site Status		Site: Example Centre for User Guide - Site 01 (1277.002) Pin Centre: Example Centre For User Guid (1277) Pin		
Example Centro Site Name	e for User Guide - Site 0	2	1277.001 Site Code 1277.002	Pending Site Status		Site: Example Site For User Guide (1277.001) Pin		

The table below summarises where the Process Audit can be viewed from.

Item Audited	View Process Audit can be viewed from	Notes
Centre Risk Rating	Centre Home Screen	On the Process Audit screen pick Change Type = "Centre Risk Rating"
Centre Status	Centre Home Screen	On the Process Audit screen pick Change Type = "Centre Status"
Site Status	Site Home Screen	
Qualification Assignment (to Site)	Edit Site Qualification	<ul> <li>Records changes to;</li> <li>Status</li> <li>Approval Date</li> <li>Direct Claim Status</li> <li>DCS Approval Date</li> </ul>
Qualification Status	Qualification	<ul> <li>The button is called <i>"View Status History"</i></li> <li>Records changes to;</li> <li>Qual Status</li> <li>Qual Approval Date</li> <li>The screen requests reason for change to be entered by the User.</li> </ul>
Qualification Set Assignment (to Site)	Edit Site Qualification set	<ul> <li>Records changes to;</li> <li>Status</li> <li>Approval Date</li> <li>Charged at Registration</li> <li>Charged at Charged at Certification</li> </ul>

## Gordon Associates

## 6. Venues

## 6.1 Venues - General

Centres may have Venues associated with them. A Venue is where the learners may sit an Assessment or Exam.

Venues       Search         Your search criteria did not return any results       Add New Venue         Your search criteria did not return any results       Search         Your search criteria did not return any results       Search         Your search criteria did not return any results       Search         Your search criteria did not return any results       Search         Your search criteria did not return any results       Search         Your search criteria did not return any results       Search         Your search criteria did not return any results       Search         Your search criteria did not return any results       Search         Your search criteria did not return any results       Search (Search Criteria Guide (Search V)         Your search criteria did not return any results       Search (Search Criteria Guide Search V)         Your search criteria did not return any results       Search (Search Criteria Guide Search V)         Your Search Criteria Guide Search (Search Criteria Guide Search (Criteria Guide Search Criteria Guide Search Crit		Workflows		Venues			Reporting			Events •
Site: Example Centre for User Guide - Site 01 (1277.001) Unpin	Venues Your sean	ch otteria did	not return a	sny results	Learners	LEUBLACE		COMUNE	Search	Actions Actions Your Recent Activity See Auto Test Four Sile One (1993.001) Pin Centre: Auto Test Four Sile One (1993.001) Pin Centre: Autor Test Centre Four (Generated by "auto (exting scripts) (1993) Pin Centre: Example Centre For User Guide - Sile 02 (1277.001) Pin Pinned Activities Site: Example Centre for User Guide - Sile 01 (1277.001) Unpin

## Add Venue

Add Venue			
Save Save and Close Close			4
enue Name			
enue Code 1	Venue Status	Approved	
Details Notes			
Address			
Street 1	County		
Street 1 Street 2	County Postal Code		
Street 1 Street 2 Street 3	County Postal Code Country	UNITED KINGDOM	
Street 1Street 2Street 3Street 3Stre	County Postal Code Country Fax	UNITED KINGDOM	

The following fields are used to define a venue.

Field Name	Purpose	Validation
Venue Name	The centre's name	Mandatory, must be entered.
Venue Code	The system generated venue code, this field is read only. Note: If you wish to input a manual code then this can be arranged by contacting Gordon Associates.	N/A
Venue Status	The status of the venue. Approved or Closed are the two options.	Mandatory: must be one of the selectable values

Venues can have an address via the Details tab and may have notes added to them via the Notes tab.



## 7. Learners Maintenance

To maintain learners, click on the Learners option of the main menu on top of the page. You will then be shown a list of the Learners currently set up within Parnassus.

Fo	or a	additional gu	idance you o	can view c	our video:						
		Quick start o	guide to lear	ner mana	gement						
Deer			1								
		Workflows	Centres Venues	Learners	Qualification 👻	Certificates	Reporting	Contacts	Admin	Events 👻	
Lea	irne	ers			_						
Ad	l New	Registration Upload	Achievement Upload	Quick Grade Entry	Request Full Cert	ificates Registr	ation Card Batches	Pending A	lt Achievement	15	
	Search I Number 0				<b>V</b> 0						
			Site	Please select a	entre		×				
				Advanced Search	Options		Search				
		Number	First Name	Last Na	ime	Gender	DOB		Crea	ted	
0	×	124043	John	Cheese		Male	07/04/1	988	07/08	/2018 15:39:59	
0	88	124042	Marnie	Moo		Female	31/05/1	989	10/07	/2018 14:41:34	
0	×	124041	Wendy	Grange		Female	25/06/2	2018	26/06	/2018 10:30:46	
0	×	124040	Mary	Quant		Female	24/06/2	2018	26/06	/2018 09:34:43	

Figure 7-1 : Learners maintenance page

Button	Purpose
Add New	Add new Learner. See section 0.
Registration Upload	Add new Learners from a file. See section 7.4.
Achievement Upload	Add new Grades from a file. See section 8.9.
Quick Grade Entry	Quickly enter grade data for a Learner. See section 7.8.
Registration Card Batches	Manage the printing of Registration Card batches for Learners. See section 7.10
Search	Search for a specific Learner. See section 7.1.
Pending Alt Achievements	View any alternative achievements to approve. See section 4.13.

### Buttons available are

## Gordon Associates

## 7.1 Search for Learners

The Learner Search options available to search by are:

- Number
- Partner Learner Identifier (PLI)
- Unique Learner Number (ULN)
- Scottish Candidate Number (SCN)
- Name
- Postal Code
- Previous Learner Codes
- Event Number
- Centre
- Site.

The order in which the Search options are displayed is configurable.

				Search 🚯 Centre Site	Select Centre Please select a Centre Advanced Search Options	Number Number ULN SCN Postal Code	*
		Number	First Name		Last Name	Previous Learner Codes	der
0	Ħ	134934	PTRRAML		PTRRAML	Partner Learner Identifier	-
0	22	134933	Stuart		Massey	And a second	Male

Figure 7-2 : Learners search page

### Buttons available are

Button	Purpose
Search	Click on 'Search' to list all eligible candidates from the criteria selected above.

The Learner Search allows the use of wildcards to increase the flexibility of searches.

A wildcard is a character that may be used in the search term to represent one or more characters. The wildcard character is represented by the "%" or "\*" character.

01242 529820

### Using Wildcards (\* or %) by example

The Name search is wild-carded by default, to allow a pattern match with the start of the name. A Name search on "Peter" would yield results of the names Peter Jones and Peter White. It has the same effect as using the search term "on%". A Name search on "B%t" would yield results of names which start with Bart, Brett or Brent.

The Postal Code search is wild-carded by default, to allow a pattern match with any part of the postcode. A Postal Code search on "D12" would yield search results which contain the postcodes BD12 8AX, BD12 7AX and BD12 8TR. It has the same effect as using the search term "%D12%". A Postal Code search on "BD12 %AX" would yield search results which contain the postcodes BD12 8AX and BD12 7AX.

The Number search is wild-carded by default, to allow a pattern match with end of the number. A number search on 853 would yield search results of 842853 and 843853. It has the same effect as using the search term "%853". A Number search on 853% would yield search results which contain the numbers 843853 and 853843.

This to	oltip is	shown	in	Parnassus:
---------	----------	-------	----	------------

equest Full Certi	For partial searching use a wildcard * next to the search term (e.g. *jo, *jo*, or jo*) Please refer to User Guide or contact Gordon Associates for further details on Searching.	
	Number 💙 0	

### Sorting search results by column heading

The returned search results can be sorted in ascending order by clicking on the column heading which you would like to sort the data by. Clicking again on the same heading will sort the results in descending order.

### **Advanced Search for learners**

The Advanced Learner Search button is a configurable option. This feature is switched off by default.

### Simple Search for learners

The same search criteria are available as when the Advanced Learner Search button is not configured to be available. See section 7.1.

Workflows	Centres Venue	Eearners	Qualification 🛨 Certi	ficates Reporting	Contacts Admin	Events -
Learners						
Add New Registration Upload	Achievement Upload	Quick Grade Entry	Request Full Certificates	Registration Card Batches	Pending Alt Achievement:	:
	Search	[	Nu	mber 🔽 🖲		
	Centre	Auto Test Centre	e Four (Generated by 'auto' te	esting scripts)		
	Site	All Advanced Search	1 Options	Search		
No Data To Display						
		1				
Gora	JN A	122	OCIE	lues		

## Figure 7-3 : Simple search Learners search page

### Buttons available are

Button	Purpose
Advanced Search Options	Clicking on 'Advanced Search Options' will take the
	user to the Advanced search Learners search page.

### 1.3.5 Advanced search Learners

The Advanced Learner Search options available to search by are:

- Number
- Partner Learner Identifier (PLI)
- Unique Learner Number (ULN)
- Scottish Candidate Number (SCN)
- First Name
- Last Name
- Date of Birth
- Postal Code
- Centre
- Site.

ement Upload	Quick Grade Entry	Request Full Certificates	Registration Card Bate	hes Pending Alt Achievement
	Number		PLI	
	ULN		SCN	
	First Name	\$	12	
	Last Name			
	Date of Bin	th 🗌	Postcode	
	Centre's Co	untry All		*
	Centre	Select Centre		*
	Site	Please select a Ce	entre	*

Figure 7-4 : Advanced search Learners search page

Buttons available are

Button	Purpose
Search	Click on 'Search' to list all eligible candidates from the criteria selected above.

# Gordon Associates

Simple Search Options

Click on 'Simple Search Options' to return to the Simple search Learners search page.

The Advanced Learner Search also allows the use of wildcards to increase the flexibility of searches. See Section 0.

## Sorting search results by column heading

The returned search results can be sorted in ascending order by clicking on the column heading which you would like to sort the data by. Clicking again on the same heading will sort the results in descending order.



## Adding, Editing and Deleting Learners

## **Adding Learners**

To create a new Learner entry, select "Add New". See Figure 7.1: Learners Search page.

## 1.3.5.1 Learner Details

ave Save & Creat	te Another Save an	nd Close Close					
rner First Name 🔺			Middle Names			Last Name *	
	Not Supplied	~	Number			ULN 🛛 -	
5 *			Ethnic Origin	Not Supplied	~	Gender *	Please Select
0			Nationality	Not Supplied	~	Prevent Learner Data being shared to third parties	
ttails Access Re	gistrations Events	Qualification Set I	Registrations   Certi	ificates   Learner Identifi	ers   Learner Images   Not	es	
tails Access Re evious Sumame(s)	igistrations   Events	Qualification Set I	Registrations Certi	ificates   Learner Identifi	ers   Learner Images   Not	es	
tails Access Re evious Sumame(s) splay Name <del>()</del> Number	igistrations Events	Qualification Set	Registrations Certi	ificates Learner Identifi	ers   Learner Images   Not	es	
tails Access Re evious Surname(s) splay Name <del>()</del> Number ork Phone No	)	Qualification Set	Registrations Certi	ificates   Learner Identifu	ers   Learner Images   Not	es	
ietails <u>Access</u> Re Yevious Surname(s) Visplay Name <b>()</b> II Number Jork Phone No mail Address	egistrations   Events	Qualification Set	Registrations Certi	ficates Learner Identifi	ers Learner Images Not	es	

Figure 7-5 : Add new learner page

To create a new learner, enter the minimum of the mandatory fields highlighted by a \*.

Field Name	Purpose	Validation
First Name	The forename of the learner	Mandatory
Middle Names	The middle names of the learner	Optional
Last Name	The surname of the learner	Mandatory
Title	Title (salutation) of the Learner. Customisable List.	Configurable as Mandatory or Optional: must be one of the selectable values
Number	Unique Identifier for the learner in Parnassus.	Customisable*
ULN	The Unique Learner Number (ULN) is a 10- digit identifier. See <u>www.miap.gov.uk</u> for further information.	Must pass the ULN checksum validation
DOB	The learner date of birth	Mandatory
Ethnic Origin	The group the learner identifies with	Mandatory: must be one of the selectable values
Gender	The gender of the learner	Mandatory: must be one of the selectable values – value 'Not Supplied' is available.

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SCNScottish Candidate NumberMust pass the SCN checksum validationPrevious Surname(s)Any previous Surname(s) the learner has had Surname(s)OptionalDisplay Name Learner's name – for example for foreign cultures where family name should be shown before given name. Display Name can be used as an alternative to First Name and Last Name fields. NB. Please note that if you wish to start using this field your existing certificate templates will need to be changed.Configurable as Mandatory or Optional:NI NumberThe learner National Insurance NumberOptionalRequest Registration CardIf selected, the learner will appear in the next Registration Card Batch for the site.OptionalWork Phone No.The Work Phone No. of the learnerOptionalMobile Phone No.The Email Address of the learnerOptionalAccount NumberThe Email Address of the learner reporting standards.OptionalNationalityCountry of Nationality of Learner from predefined list. Country is used to adhere to reporting standards.OptionalPrevent Learner Data being shared to third partiesInformation onlyOptional			
Previous Surname(s)Any previous Surname(s) the learner has had OptionalOptionalDisplay Name Learner's name – for example for foreign cultures where family name should be shown before given name. Display Name can be used as an alternative to First Name and Last Name fields. NB. Please note that if you wish to start using this field your existing certificate templates will need to be changed.Configurable as Mandatory or Optional:NI Number Request Registration CardThe learner National Insurance Number next Registration Card Batch for the site.OptionalWork Phone No. Email AddressThe Work Phone No. of the learner The Kocount number for the learnerOptionalMobile Phone No. Email AddressThe Email Address of the learner Prevent Learner Data being shared to third partiesOptionalPrevent Learner Data being shared to third partiesInformation onlyOptionalOptional United to third partiesInformation onlyOptional	SCN	Scottish Candidate Number	Must pass the SCN checksum validation
Display NameAllows you to specify a different format for a Learner's name – for example for foreign cultures where family name should be shown before given name. Display Name can be 	Previous Surname(s)	Any previous Surname(s) the learner has had	Optional
NI NumberThe learner National Insurance NumberOptionalRequest Registration CardIf selected, the learner will appear in the next Registration Card Batch for the site.OptionalWork Phone No.The Work Phone No. of the learnerOptionalMobile Phone No.The Mobile Phone No. of the learnerOptionalEmail AddressThe Email Address of the learnerOptionalAccount NumberThe Account number for the learnerOptionalNationalityCountry of Nationality of Learner from reporting standards.Optional ("Not Supplied")Prevent Learner 	Display Name	Allows you to specify a different format for a Learner's name – for example for foreign cultures where family name should be shown before given name. Display Name can be used as an alternative to First Name and Last Name fields. NB. Please note that if you wish to start using this field your existing certificate templates will need to be changed.	Configurable as Mandatory or Optional:
Request Registration CardIf selected, the learner will appear in the next Registration Card Batch for the site.OptionalWork Phone No.The Work Phone No. of the learnerOptionalMobile Phone No.The Mobile Phone No. of the learnerOptionalEmail AddressThe Email Address of the learnerOptionalAccount NumberThe Account number for the learner from predefined list. Country is used to adhere to reporting standards.Optional ("Not Supplied")Prevent Learner Data being shared to third partiesInformation onlyOptional	NI Number	The learner National Insurance Number	Optional
Work Phone No.The Work Phone No. of the learnerOptionalMobile Phone No.The Mobile Phone No. of the learnerOptionalEmail AddressThe Email Address of the learnerOptionalAccount NumberThe Account number for the learnerOptionalNationalityCountry of Nationality of Learner from predefined list. Country is used to adhere to reporting standards.Optional ("Not Supplied")Prevent Learner Data being shared to third partiesInformation onlyOptional	Request Registration Card	If selected, the learner will appear in the next Registration Card Batch for the site.	Optional
Mobile Phone No.The Mobile Phone No. of the learnerOptionalEmail AddressThe Email Address of the learnerOptionalAccount NumberThe Account number for the learnerOptionalNationalityCountry of Nationality of Learner from predefined list. Country is used to adhere to reporting standards.Optional ("Not Supplied")Prevent Learner Data being 	Work Phone No.	The Work Phone No. of the learner	Optional
Email AddressThe Email Address of the learnerOptionalAccount NumberThe Account number for the learnerOptionalNationalityCountry of Nationality of Learner from predefined list. Country is used to adhere to reporting standards.Optional ("Not Supplied")Prevent Learner Data being shared to third partiesInformation onlyOptional	Mobile Phone No.	The Mobile Phone No. of the learner	Optional
Account NumberThe Account number for the learnerOptionalNationalityCountry of Nationality of Learner from predefined list. Country is used to adhere to reporting standards.Optional ("Not Supplied")Prevent Learner Data being shared to third partiesInformation onlyOptional	Email Address	The Email Address of the learner	Optional
NationalityCountry of Nationality of Learner from predefined list. Country is used to adhere to reporting standards.Optional ("Not Supplied")Prevent Learner Data being shared to third partiesInformation onlyOptional	Account Number	The Account number for the learner	Optional
Prevent Learner Information only Optional Shared to third parties	Nationality	Country of Nationality of Learner from predefined list. Country is used to adhere to reporting standards.	Optional ("Not Supplied")
	Prevent Learner Data being shared to third parties	Information only	Optional

\* **Note:** Parnassus can be configured to generate the Learner Code or to be entered manually. By default the code is an incremental number starting at a number chosen by the Awarding Body. If it is to be entered manually, then some work will need to be done by Gordon Associates to enforce the format required.

To create an address:

Field Name	Purpose	Validation
Street 1	First line of the address	No Validation
Street 2	Second line of the address	No Validation
Street 3	Third line of the address	No Validation
City/Town	City/Town the site is in	No Validation
County	County the site is in	No Validation
Postal Code	Postal code of the site	No Validation
Country	Country the site is in	No Validation
Phone	Primary phone number of the site	No Validation
Fax	Primary fax number of the site	No Validation

You can use the Address lookup feature by using the Lookup button as shown below:

Membership Registration Card Non-Series Note No Mobile Phone N	
Indi Addewa Mali Addewa Indi Addewa Indiress	
ddress codup	
1dress mkg	
ddress Andrap	
eokup	
reet 1 County	
reet 2 Postel Code	
country	
/Town Pax	

To Lookup an address you will need to input the country and at least one other part of the address e.g. the postal code as shown below. To add the address that is found click the select icon  $\circ$ :

Save & Create Ann	her Save and Class Down Mer	ge Lauman					
Learner First Name *	Fob	Middle Names	1/1		Last Name *	Roy	1
Title	M	Alumbus lat	ese 1		UUN® -	1	9
DOE *	Did Select Address				Cender	Male	141+
SCN 0	1 address match was found	, select the address you w	ish to use from the list be	low to populate the			
	Cheltenhern Gi 50	TTY. UK	nanangeo.	1			
Details Access Registr	ations	a. (1 a		areason a			
				Cance			
Previous Surname(s)							
Display Name							
	Member	ship Number		Request Regis	tration Card		1
Work Phone No	Mobile F	hone No					
Email Address	1	6					
Account Number							
Address							
Address							
Address Loolup Street 1				County			
Address toniup Street 1 Street 2				County Postal Code a	L50 1TY	Ŷ	
Address Loobap Street 1 Street 2 Street 3				Country Postal Code G	LSO ITY INLIED KINSDOM	Ŷ	

### Buttons available are

Button	Purpose
Save	Saves entered data and allows the user to continue editing the current Learner.
Save & Create Another	Saves entered data, then clears screen fields and allows the user to add another new Learner.
Save and Close	Saves entered data, then returns to the Learners Search page.
Close	Returns to the Learners Search page, displaying the previous search results, without saving any changes.
Merge Learner	Only used in Learner Edit mode, as there must be a learner to merge. See section 0.

**Note:** Where mandatory fields have not been entered, the data will not be saved and any empty mandatory fields will be highlighted. Fill in the empty mandatory fields and reselect save.

## 1.3.5.2 Access

	9 : No information provided by learner	
Disability	99 : Not known/information not provided	•
Specific Learning Difficulty	99 : Not known/ information not provided	12 <b>.</b>
Additional Learning Needs	99 : Not known/ information not provided	*
Resconsble ádjustments		
Select Reasonable Adjustment	004:Extra Time up to 25%	Add
Select Reasonable Adjustment	004:Extra Time up to 25% 99:Not Known	Add
Select Reasonable Adjustment	004:Extra Time up to 25% 99:Not Known	▼ Add

## Figure 7-6 : Access tab

Field Name	Purpose	Validation
Learning Disabilities	Breakdown of learning disability	Optional: must be one of the selectable values
Disability	Breakdown of disability	Optional: must be one of the selectable values
Specific Learning Difficulty	Breakdown of learning difficulty	Optional: must be one of the selectable values
Additional Learning Needs	Breakdown of learning needs	Optional: must be one of the selectable values

## Buttons available are

Button	Purpose
Add	Add Reasonable adjustments for the learner to the list, ready to be saved.
Remove	Remove Reasonable adjustments for the learner from the list, ready to be saved.

## 1.3.5.3 Learner Events

Access Registration	Sons Events	Qualification Set Registrations	Certificates    Learner Ident	tifiers   Learner Images	Notes
Add Event Registration	Refresh				
No data to display					

## Figure 7-7 : Add Learner Events tab

### Buttons available are

Button	Purpose	
Save	Saves entered data and allows the us the current Learner.	er to continue editing
Gordon A	ssociates	
Suite G1 Montpellier House Montpell	ier Drive, Cheltenham, Gloucestershire GL50,1TY	01242 529820

Save & Create Anothe

Saves entered data, then clears screen fields and allows the user to add another new Learner.



## Figure 7-8 : Add Event Registration page

Field Name	Purpose	Validation
Event	The Event for which the learner is to be registered. The learner must also be registered on the associated qualification.	Mandatory: must be one of the selectable values
Registration Date	Registration date applied to the qualification registration which will be created if the user saves.	Mandatory: Only appears if the learner is not registered on the qualification associated with the event.

### Buttons available are

Button	Purpose
Save	Saves entered data and allows the user to continue editing the current Learner.
Cancel	Returns to the Learners page, without saving any changes.

## 1.3.5.4 Partner Learner Identifiers

Add Learn	er Idenbher	
Centre	Select Centre	ű <del>y</del>
Identifier		
		Save Cancel

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## Figure 7-9 : Add Learner Identifier page

Field Name	Purpose	Validation
Centre	The forename of the learner	Mandatory
Identifier	External System Identifier – Identifier used in a system other than Parnassus. Learners may have more than 1 identifier, but only 1 identifier per centre.	Mandatory

## Buttons available are

Button	Purpose
Save	Saves entered data and allows the user to continue editing the current Learner.
Cancel	Returns to the Learners page, without saving any changes.

## 1.3.5.5 Learner Images

In the Learner Images tab you can add a Learner Photo and a Learner Signature – these can be set as mandatory requirements on a qualification.

## 1.3.5.6



To add a Learner Photo or Learner Signature you use the Add New button and can browse for the correct image which must be in .jpeg or .png format.

		<u>10</u>		5	
DOB*	22/08/1999	Ethnic On Photo Upload			
SCN 😝		Nationalit File (png, jpeg)	Choose file No file chosen Upload		third parties
Details Access Re	egistrations   Events   Qualification Set Reg	gistrations Certificates			
Image History					
Learner Photo				Save & Close Close	
No Image Found	Add New				
Learner Signati	ure				
No Image Found	Add New				

The Learner Photo or Learner signature can be replaced by using the Replace button and

			Ť	A	
	Registered with Qualification	Image Type	Registered by Centre	Modified	Upload Date
0	Registered with Qualification.	Image Type Signature (current)	Registered by Centre Naterogetered from a control	Modified User adminay	Upload Date 19/09/2018 00:33:29

on the row for the image.

## uploading the replacement image. The history of the images used is accessble by the Image History button. You can view the current and previous images by using select 👂

**Editing Existing Learners** 

Select 📀 to the left of the required file to display the Learner details in the screen. See Figure 7.1: Learners Search screen.

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annei										
ave Save & Crea	e Another Save and Close	Close	Merge Learner							
irner First Name 🔺	Wendy		Middle Names			Last Name +			Grange	
	Not Supplied		Number	124041	]	ULN O +			[	9
0+	25/06/2018		Ethnic Origin	Not Supplied	~	Gender *			Female	•
0			Nationality	UNITED KINGDOM	~	Prevent Learner Data beir	ng shared to d	iird parties		
tails Access Re	gistrations Events Qualifi	cation Set I	Registrations Cer	tificates   Learner Identifie	ers   Learner Images   Ne	ates				
Add Registration										
6				0				(1) (1)	0.10.10	(C
Code	nit Title			Date	Centre - Site		Status	Registration	Set	By
-	Testing Qualificat	ion 1 : NQF	- (1 pathway, 2	25/05/2018	Auto Test Centre One (	Generated by 'auto' testing	In	110		
S M ALTERNIT		<ul> <li>Lapping are</li> </ul>	n no auto regrinn	26/06/2018	SCHERT - AUTO LEST UNE	s Site Une (Generated by	- National Association of the second	140		_0a

Figure 7-10 : Edit existing learners page

Button	Purpose
Save	Saves entered data and allows the user to continue editing the current Learner.
Save & Create Another	Saves entered data, then clears screen fields and allows the user to add another new Learner.
Save and Close	Saves entered data, then returns to the Learners Search page.
Close	Returns to the Learners Search page, displaying the previous search results, without saving any changes.
Merge Learner	Only used in Learner Edit mode, as there must be a learner to merge. See section 0.
4	Display the Audit History Screen.

Buttons available are

Edit the required fields and click save.
### Merge Learner

Enter the source learner code	134955	Select
0	Find Duplicates	
Summary		
First Name: Laney		
Last Name: Road Address		
Click the Merge button if you registrations and any related i learner record for Candy Statt Partner Learner Identifiers an	wish to merge these two lea units, grades and certificate on (134956). The learner re d Images will be removed. I	arners or click Close to cancel the operation. The is from Laney Road (134955) will be merged into the cord for Laney Road (134955), including any Notes, t will not be possible to undo the merge.

Figure 7-11: Merge learner

#### Buttons available are

Button	Purpose
Select	Selects the learner associated with the entered source learner code to be merged.
Find Duplicates	Find any duplicate records, where the learner has the same date of birth and a similar Name or similar previous Surname.
Merge	Merges the registrations and any related units, grades and certificates (from the learner code specified as the source) into the learner record currently being edited. The source learner record, including any notes, Partner Learner Identifiers and images is removed. It will not be possible to undo the merge.
Close	Returns to the Learners Edit page without merging any data.

### **Deleting Learners**

Select <sup>SE</sup> to the left of the required record to delete the associated details. See Figure 7.1: Learners Search screen.

Are you su	re you want to	delete this item?		
			1010	

Figure 7-12: Confirmation of deleting a learner



Select OK, to delete, otherwise cancel the deletion.

You cannot delete a learner if they have a registration - this should be deleted first.

#### 7.2 Manage Learner Registrations

Buttons available are

To maintain learner Registrations, click on the Registrations Tab on the Learner search page. You will then be shown a list of the Registrations currently setup within Parnassus for the Learner. A learner may be registered for any number of qualifications.

e Seve & Creat	te Another Sav	we and Close	Close	Merge Learner							
er First Name ·	Wendy		0	Middle Names		0	Last Name -			Grange	
	Not Supplied	~		Number	124041		ULN () +				9
10	25/06/2018			Ethnic Origin	Not Supplied	~	Gender *			Female	~
				Mariopality	UNITED KINGDOM		Present Learner Data beir	ne shared to t	hird parties		
ils Access Re	egistrations Eve	ents Qualific	ation Set F	Registrations Cer	tificates   Learner Identifi	ers   Learner Images   No	tes			557	
lls Access Re Id Registration Qual/U Code	egistrations <u>Eve</u>	ents Qualific	ation Set F	Registrations Cer	tificates   Learner Identifi Registration Date	ers Learner Images No Centre - Site	tes	Status	Standalone Registration	Qualification Set	Create By



 Button
 Purpose

 Add Registration
 Add a new Registration for the current Learner. See section 0.

Select 🕑 to the left of the required entry to edit the Qualification Registration. See section 0.

Select  $\stackrel{\textbf{X}}{\leftarrow}$  to the left of the required record to delete the associated details.

Inclusion and and and and and and and and and an				
Are you su	re you want to	delete this item?		
				-
			OK	Cance

Figure 7-14 : Confirmation of deleting a learner registration

Select OK to delete, otherwise cancel.

You may not delete a qualification registration record if it contains unit registrations. These must be de-selected first. You may not de-select a unit registration if it has a grade.



### **Add Registration**

Add a new Registration for the current Learner.

Centre	954:avril centre	*
Site	954.001:avril site	•
Qualification	MBSAODT:: Modern Bailroom	
Pathway	Default	•
Registration Date	19/09/2018	

## Figure 7-15 : In-page add registration popup

Buttons available are

Button	Purpose
Save	Saves entered data.
Cancel	Discards any entered data and returns to the Manage Learner Registrations screen.

Field Name	Purpose	Validation
Centre	The centre's name	Mandatory
Site	The site's name	Mandatory
Qualification	The qualification a learner will be studying	Mandatory
Pathway	The pathway the learner will follow (default if not specified)	Mandatory
Registration Date	The date of registration	Mandatory

Note: If Learner Image or Signature Image is set as a requirement for the qualification and the learner does not have a photo or signature you will see the error below:

entre	954:avril centre	*
Site	954.001:avril site	
Qualification	NewIu:1 Unit	•
Pathway	Default	*
	Conservation (1)	

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### **Edit Qualification Registration**

Edit a Qualification Registration for the current Learner.

Seve Save and Close	Close Transfer Registration Move Registration			4
Qualification Units Pl	R    Event Info    Alternative Achievement    Entry Require	ments Qualification Prerequisites Notes		
Qualification Centre/Site	Building Sheds avril centre - avril site (954.001)			
Pathway	Default 👻			
Qualification Set				
Qualification Code	85	Status	In Progress	
Registration Date	18/09/2018	Reg Group Code		
Expiry Date		Extend Expiry	53	
Earliest Certificate Date	18/09/2018	Withdrawn		
Last Assessment Date		Unsuccessful	0	
Certificate Expires Date		Request Full Certificate	G	
Height	M It in	Weight	KG st b	
Study Mode	Not Supplied	Assessment Language	ENG:English 💌	
Total Credit Registered	To Date 4/4			
Total Credit To Date	0/4			

## Figure 7-16 : Edit Qualification Registration page

Buttons available are

Button	Purpose
Save	Saves entered data.
Save and Close	Save entered data and close the Edit Registration screen.
Close	Returns to the Learners Registration screen without saving any changes.
Transfer Registration	Opens the Transfer Registration popup.
Move Registration	Opens the Move Registration popup.
Recalculate	Selected after grades have been entered for the associated units. See section 0. Recalculates an overall grade for the Qualification. See section 0.
*	Display the Audit History Screen.

Field Name	Purpose	Validation
Qualification Code	The centres name	N/A
Pathway	Learners specialisation, also known as route	N/A
Reg. Date	The date of registration	Mandatory
Status	The status of the qualification	N/A
Expiry	Registration expiry date. Based on lifetime field on qualification	N/A
Extend Expiry	Enables the user to extend the Registration expiry date.	Optional
Earliest Certificate Date	Earliest date a certificate may be issued. For NVQ's this is 10 weeks after the registration date.	N/A

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Withdrawn	Indicates whether the learner has withdrawn and shows the date of withdrawal.	Optional Cannot be selected if the registration has a status of Complete
Last Assessment Date	***	Optional
Request Full Certificate	Indicates whether the learner has requested a certificate for a qualification.	Optional
Certificate Expires Date	***	
Reg. Group Code	Free text grouping. Enables the classification of a group of people doing a qualification at the same time.	Optional
Assessment Language	The Language the qualification will be assessed in	Mandatory: must be one of the selectable values

For a Credit Based registration, the user will be shown the total credit that the learner has been registered for and the total credit that the learner has achieved to date.

Total Credit Registered To Date	0/2	13
Total Credit To Date	0/2	No. of Concession, Name
Grade		Renalculate

## Figure 7-17 : Edit Qualification Registration (Credit Based)



#### **Edit Qualification Registration - Units**

and in the								-								
ation U	Units PLR	Event Info A	ternative Achievement	Entry Requir	ements Q	ualification Pr	rerequisites Note	ES.								
Units I.																
anistra	tion has	2 Maraines Cl	ick Here to Show Det	mile (												
agistia	LION NES	2 Herningsrich	ick here to onow per	(d)() ()												
U	Init Code	Linit Name	Reg Date	Type.	Credit	Level	Grade	RPL	Attempts on mg (All)	Alt Ach	Pre-Reg	Res Rel Date	Inc. On Award	Use Best	Part Reg	Unit Reg
	20a	ZUA	18/09/2018	м	2	1		10 I	0(0)		No		8		0	
	208	208	18/09/2018	м	1	1		63	0 (0)		No		8	1	137	13
	2UC	2UC	18/09/2018	0	1	1		13	0(0)		No			8	13	6

### Figure 7-18 : Edit Qualification Registration – Units page

Buttons available are

Button	Purpose
Select Units	Opens the Edit Qualification Registration – Pathway screen. See Section 0.

Field Name	Purpose	Validation
Use Best	Use the best available grade achieved on this unit across all qualification registrations or use the grade achieved on this qualification registration. (The column formerly known as Use Prior).	N/A
Inc On Award	Should this unit registration be included in the overall qualification registration, or was it taken by the learner as an additional unit. If unticked, the learner may only receive a unit certificate for this unit.	N/A

Select <sup>Select</sup> to the left of the required entry to edit the Qualification Registration. See section 0.

Clicking on the 10 button in the top left corner displays help for each column heading.

For a Credit Based qualification which has had 'Other Units Constraints' set up on the pathway, the user will be able to add the credits/grades for a learner which they have obtained in other appropriate units and have them count towards the current qualification.

Other	Units									
Add OU	wr Units Constrain	Registration Mandatory: 0 Optional: 1								
	Group	Subject	Level	Credit Cap	Achievment Month Limit	м / о	UAN	Title	Credit Achieved	Grade
D 8	Mandatory	1.1 : Medicine and Dentistry	1	5	24	Optional	UNI	Horse Dentistry	5	Pass

#### Figure 7-19 : Edit Qualification Registration (Credit Based) - Other Units

Buttons available are



Button	Purpose
Add Other Units Constraint Registration	Opens the Add Other Units Constraint Registration screen.

## Add Other Units Constraint Registration

Enter grades obtained for the other unit to be added for this qualification.

Other Units Constraint	Group: Mandatory   Subject: 1.1 - Medicine and Dentistry   Level: 1   Credit Cap: 5   A.	•
UN *		
Title 📍		
Credits		
Grade		
Purchase Order		

## Figure 7-20 : In-page Add Other Units Constraint Registration details popup

Buttons available are

Button	Purpose
Save and Close	Saves any data changes and returns to the Edit Qualification Registration – Units screen.
Close	Returns to the Edit Qualification Registration – Units screen.

Field Name	Purpose	Validation
Other Units Constraint	Shows any mandatory/optional other unit constraints. Must register the Learner's detail for any mandatory other unit constraints.	Read Only
UN	Unit Accreditation Number	Mandatory
Title	Other Unit title	Mandatory
Credits	Other Unit Credit value	Optional
Grade	Grade Achieved for the other unit	Optional

### Unit Registration Details – Non Credit Based

Enter grades obtained for the unit.

it Code	The 52/1	Principles of Water Jnit 3a	ing, Feed	ing and Fittening	Horses					*
jistration Date	19/0	J9/2018				Last LRS Action Last LRS Action Date	None None			
lude On Award ading Prerequis	tes )									
dd Grade	18	9/09/2018								
rade		855		+						
isult Release Date		ad								
	-									
ttempts		Assessment	Void	Last Modified Date	User	Alternative Achievement	Last LRS Upload	Release Date	Expiry Date	
ttempts Grade	Assessment Date	venue								
Grade Grade	Assessment Date 19/09/2018	venue		19/09/2018	adminav	Na				
Grade	Assessment Date 19/09/2018	venue		19/09/2018	adminav	Na				

Figure 7-21 : In-page edit unit registration details popup

Buttons available are

Button	Purpose
Add	Add the Grade achieved.
Save	Saves any data changes.
Close	Returns to the Edit Qualification Registration – Units screen.
4	Display the Audit History Screen.

Field Name	Purpose	Validation
Registration Date	Date of registration	Mandatory
Include On Award	Whether unit is to be included on the award	Optional
Date	Date Grade achieved	Mandatory
Grade	Grade Achieved	Mandatory

**Note:** The number of Grades which can be added is dependent on the maximum number of resits which have been configured for the unit associated with this Pathway.

### Unit Registration Details – Credit Based

If 'Alternative Achievement' is not selected, entering grades is the same as entering grades for Non Credit Based Qualifications: see above.



If 'Alternative Achievement' tab is selected, this allows the user to enter an alternative or equivalent achievement, which is recognised as being the equivalent of passing the unit in the normal way.

Unit	Select Unit			*
Exempting Qualification				
Exempting Unit(s)				
Approved 🔯		Rejected	0	
Approved On		Rejected On	[]	
You ne	d to save the alternative achieve	ement before adding e	vidence to it	
You ne	d to save the alternative achieve	ement before adding e	widence to it	
You ne	d to save the alternative achieve tach a File Choose file No file o	ement before adding e	vidence to it	
You ne	d to save the alternative achieve tach a File <u>Choose file</u> No file o	ment before adding e	vidence to it	
You no	d to save the alternative achieve	hasen	vidence to it	
You no	d to save the alternative achieve	hasen	vidence to it	



Buttons available are

Button	Purpose
Add	Add the Grade achieved.
Save and Close	Saves any data changes and returns to the Edit Qualification Registration – Units screen.
Close	Returns to the Edit Qualification Registration – Units screen.
*	Display the Audit History Screen.

Field Name	Purpose	Validation
Registration Date	Date of registration	Mandatory
Include On Award	Whether unit is to be included on the award	Optional
Date	Date Grade achieved	Mandatory
Grade	Grade Achieved	Mandatory: select from available values
Alternative Achievement	Whether Unit grade has been achieved by an alternative method.	Optional
Alternative Achievement Type	How the achievement relates to this unit.	Mandatory: select from available values
Equivalent Unit	Name of the equivalent unit.	Optional
Reason	Notes for any required explanations.	Optional
Alternative Achievement Date	Date that the alternative grade was achieved.	Mandatory

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**Note:** The number of Grades which can be added is dependent on the maximum number of resits which have been configured for the unit associated with this Pathway.

### **Alternative Achievement**

There are 4 types of Alternative Achievement records in Parnassus. In each case these are recorded against a Learners Unit Registration to show that they have been exempted from study and /or assessment of the Unit:

#### • RPL – Record of Prior Learning

A simple tick-box against a Unit Registration to show that the "learning" has been previously undertaken. A grade is still required and according to the business-rules of the Awarding Body, assessment may still be required.

#### • Planned Exemption

When the Qualification is setup in Parnassus there is the option to record multiple "Planned Exemptions" where for the Unit registered other previously achieved Qualifications exempt the Learner from both studying and assessment of the Unit.

#### • Unplanned Exemption

The Learner may request to be exempt from the study and assessment for the Unit based on some prior qualification and/or experience. The Awarding Body will assess this and may wish to grant the exemption on an individual basis.

#### Equivalent Units

When the Qualification is setup in Parnassus there is the option to record multiple "Equivalent Units". This is a Credit Based specific concept where other Credit Based units may exist which are considered Equivalent to the registered Unit.

#### Adding a Record of Prior Learning (RPL)

Once a grade has been recorded against a Unit Registration for a Learner (regardless of how this is done, manually, quick-grade entry, file import) the Learners Qualification Registration and should be opened and where applicable against the appropriate Unit the RPL checkbox can be ticked.

See screen shot below.

Note that RPL is for information only and does not have any functional impact.

Rication [Units] [FUR] [Event Enfo [Atternative Achievement] [Entry Requerements] Qualification Prerequisites [Aotes]		
Registration has 2 Warnings. Click Here to Show Details.	ment   Entry Requirements   Qualification Prerequisites   Notes	
systration has 2 Warnings. Click Here to Show Details.		
rgistration has 2 Warnings. Click Here to Show Details.		
egistration has 2 Warnings. Click Here to Show Details.		
	ow Details.	
Attempts on Inc. On Use Part		Unit
Unit Coop Unit Name Red Date Type Credit Level Sidoo RPU Too Res Rel Date	Type Credit Level Grade BPL Attempts on Alt Arb Per-Reg. Rec Rel Date Inc On Use Part	

#### Adding a record of a "Planned Exemption" to a Learners Registration

When a Qualification is setup in Parnassus it is possible to pre-define some Exemptions at Unit Level. These "Planned Exemptions" are usually agreed when the Qualification is designed. See the section on "Planned Exemptions" in the Qualification part of the manual for details of setting up these.

To add the record of a "Planned Exemption" to a Learners Unit Registration: >> Go to the Learners page and select the relevant Qualification Registration. >> Select the "Alternative Achievement" tab as shown below.

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Edit Qualification Registration - Building Sheds	
Seve Save and Close Close Transfer Registration Move Registration	4
Qualification         Units         FUR         Event Infs         Atternative Achievement         Entry Requirements         Qualification Prerequisites         hotes           Add Equivalency         Add Planed Exemption         Add Unplaned Exemption         Add Unplaned Exemption	
to Exemptions or Equivalences	

>> Click the "Add Planned Exemption" button.

>> If there are any "Planned Exemptions" recorded for the Units of the Qualification then the following form will pop-up.

>> Complete this form as indicated and click "Save" or "Save and Close" button.

>> Notes (including copies of evidence) can only be added once the record is saved.

Unit	20a:20A		*
Exemption	Select Exemption	•	
Description:		1	
Qualification:			
Exempting Unit(s):			
Grade	Pass 🔻		
Approved		Rejected	
Approved On		Rejected on	
You nee	d to save the alternative achieve	ment before adding evidence to it	
At	tach a File Choose file No file c	hosen	11
	-	()()	

Field Name	Purpose	Validation
Unit	Unit in selected Qualification Registration for which a Planned Exemption is to be recorded.	Drop Down list
Exemption	Code as entered in Unit Details page	Drop Down list
Description	Free text	
Qualification	As recorded for selected Exemption code	Read Only
Exempting Units	Free text	
Grade	The only available grades here will be 'pass' ones and will be limited to those applicable for Unit selected.	Drop Down list
Approved	Indicates whether the Exemption has been approved.	Checkbox
Approved On	Date of Approval	Valid Date
Notes	Can only be added once record is saved	

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\* If the achievement is updated to approved or rejected an email will be sent to the email address configured under the setting AlternativeAchievement.EmailParnassusOperator. Parnassus will not email the centre directly it is up to the AO to inform the centre of their decision.

#### Adding a record of an Unplanned Exemptions Unit to a Learners Registration

If a Learner requests exemption from a Unit for reasons that have not be foreseen when the qualification was designed, then an "Unplanned Exemption" should be recorded.

To add the record of a "Planned Exemption" to a Learners Unit Registration: >> Go to the Learners page and select the relevant Qualification Registration. >> Select the "Alternative Achievement" tab as shown below.

Edit Qualification Registration - Building Sheds	
Save Save and Close Close Transfer Registration Move Registration	4
Qualification     Units     PAR     Event Infs     Alternative Achievement     Entry Acquirements     Qualification Premousites     Notes       Add Equivalency     Add Unglanned Exemption     Add Unglanned Exemption     Add Unglanned Exemption	

- >> Click the "Add Planned Exemption" button
- >> The following form will pop-up.
- >> Complete this form as indicated and click "Save" or "Save and Close" button.
- >> Notes (including copies of evidence) can only be added once the record is saved.

	Balect Unit			
fication	2Ua:2UA			
	2UB:2UB			
90.	2UC:2UC			
63		Rejected	0	1
ſ		Rejected On		
You need to	o save the alternative act	slevement before adding e	vidence to it	
			Second in the	2
Attac	h a File Choose file No	flé chosen		
	Fication	Attach a File Choose file No	Attach a File Choose file No file chosen	Attach a File Checae file No file chosen

Field Name	Purpose	Validation
Unit	Unit in selected Qualification Registration for which a Planned Exemption is to be recorded.	Drop Down list
Exempting Qualification	Free text	
Exempting Units	Free text	

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Grade	The only available grades here will be 'pass' ones and will be limited to those applicable for Unit selected.	Drop Down list
Approved	Indicates whether the Exemption has been approved. *	Checkbox
Approved On	Date of Approval	Valid Date
Rejected	Indicates whether the Exemption has been Rejected. *	Checkbox
Rejected On	Date of Rejection	Valid Date
Notes	Can only be added once record is saved	

\* If the achievement is updated to approved or rejected an email will be sent to the email address configured under the setting AlternativeAchievement.EmailParnassusOperator. Parnassus will not email the centre directly it is up to the AO to inform the centre of their decision.

### Adding a record of an Equivalent Unit to a Learners Registration

"Equivalent Units" are a Credit Based concept similar to "Planned Exemptions". When a Qualification is setup in Parnassus it is possible to pre-define some exemptions at Unit Level. These "Equivalent Units" are usually agreed when the Qualification is designed. See the section on "Equivalent Units" in the Qualification setup section of the manual for details of setting up these.

To add the record of a "Equivalent Unit" exemption to a Learners Unit Registration:

>> Go to the Learners page and select the relevant Qualification Registration.

>> Select the "Alternative Achievement" tab as shown below.

Edit Qualification Registration - Building Sheds	
Save Seve and Close Close Transfer Registration Move Registration	4
Qualification         Units         F.M.         Event Infs         Acternative Achievement         Entry Requirements         Qualification Prenousities         Rotes           Add Equivalency         Add Planned Exemption         Add Unplanned Exemption         Add Unplanned Exemption           No Exemptions or Equivalences         Image: Comption Science	

>> Click the "Add Equivalency" button.

>> If there are any "Equivalent Units" recorded for the Units of the Qualification then the following form will pop-up.

>> Complete this form as indicated and click "Save" or "Save and Close" button.

>> Notes (including copies of evidence) can only be added once the record is saved.

and a		Select Unit		•
Equivalency Co	de	Select Equivalency Co	da 🔻	
escription:			/	
Inits used for a	quivalency	No Unit Equivalenc	Ses	
Approved			Rejected	
Approved On			Rejected On	
	You need to	save the alternative achi	revement before adding evidence to it	
				11
	Attach	a File Choose file No f	Te chosen	

Field Name	Purpose	Validation
Unit	Unit in selected Qualification Registration for which a Planned Exemption is to be recorded.	Drop Down list
Equivalency Code	Code as entered in Unit Details page	Drop Down list
Description	Free text	
Units used for Equivalency	As recorded for selected Exemption code	
Grade	The only available grades here will be 'pass' ones and will be limited to those applicable for Unit selected.	Drop Down list
Approved	Indicates whether the Exemption has been approved. *	Checkbox
Approved On	Date of Approval	Valid Date
Rejected	Indicates whether the Exemption has been Rejected. *	Checkbox
Rejected On	Date of Rejection	Valid Date
Notes	Can only be added once record is saved	

\* If the achievement is updated to approved or rejected an email will be sent to the email address configured under the setting AlternativeAchievement.EmailParnassusOperator. Parnassus will not email the centre directly it is up to the AO to inform the centre of their decision.

## **Edit Qualification Registration - Pathway**

Select the units to be allocated to the Learner's Pathway.

	Minimum Units: 3 Minimum Credits 4			Meximum Units: 2 Meximum Credits: 14	
nting: larner has of a OCF 0	not achieved enough credit f lualification or No Pathway	om units al the level of the qua	ification or above. Needs 4 cradit		
andatory	Minimum; 2 Maximum; 2)				(Minimum Credit: 3 Maximum Credit: 3
Cor	tributes UN	Unit Code	Unit Title	Credit Value	Mandatory
е н		20a	ZUA	2	8
8		2UB	2UB	£	2
M) Isnoit	nimum: 1 Maximum: 1)				(Minimum Credit: 1 Maximum Credit: 11
Cor	tributes UN	Unit Code	Unit Title	Credit Value	Mandatory
8 1	89688	200	200	1	
		3160 CB	3180 - Credit Based	11	

#### Figure 7-23 : Edit Pathway page

Buttons available are

Button	Purpose
Close	Will save the units selected for the Pathway.

The correct number of Mandatory and Optional units should be selected, as specified on the screen. For Credit Based qualifications, the combination of units selected should give a total credit value between the minimum and maximum credit values specified on the screen.

**Note:** The consequences of the user selecting a combination of units which doesn't give a total credit value between the minimum and maximum credit values specified on the screen is configurable to give:

- 1. No Error or Warning User is allowed to make an incorrect combination selection.
- 2. Error User is stopped from making an incorrect combination selection.
- 3. Warning User is warned they have made an incorrect combination selection.

### Edit Standalone Qualification Registration - Pathway

Select the unit to be allocated to the Learners Pathway.

Pathway: Default		parnassusvm:90 savs	
Close		You can only register for one unit on a Standalone Unit Registration.	
Minimum Units: 1			
Mandatory (Minimum: 1 Maximum: 1)			-
Contributes UN	Unit Code	Unit OK	Mandatory
0.0	&&	Amps	
8 8	LASAODT	: Latin Amerikan	0
8 0	NU344	New Lint 344	0
<b>D</b> . 0	UT287	Unit Test 287	

#### Figure 7-24 : Edit Pathway (Standalone Qualification) popup

Buttons available are

Button	Purpose
Close	Will save the units selected for the Pathway.

Where a qualification has been selected as standalone (See Section 8.3), only a single Unit is allowed to be registered against it.

### **Transfer Registration**

elect Centre	
Piease select a Centro	÷
Select Site First	*
Select Qualification First	*
9/09/2018	
	Piece Centre Pieces select à Centre Select Site First Select Qualification First 9009/2018



Buttons available are

Button	Purpose
Transfor	Transfers the registration to the new location. Adds a new entry to the Manage Learner Registrations screen with the new Centre location. Updates the existing entry with a Transferred status. See Figure 7-26 : Manage learner registrations page with transferred status
	at the time of the transfer, using the Transfer Date.

Close	Returns to the Edit Qualification Registration screen without transferring the registration.
	6 6

Field Name	Purpose	Validation
Centre	The centre name to transfer to	Mandatory
Site	The site name to transfer to	Mandatory
Qualification	The qualification being transferred	Mandatory
Pathway	Learners specialisation	Mandatory
<sup>⊃</sup> urchase Order	Purchase order reference	Optional (unless the site has the Purchase order reference stipulated as Mandatory)
Transfer Date	Date of transfer	Mandatory
Site Qualification Pathway Purchase Order Transfer Date	The site name to transfer to The qualification being transferred Learners specialisation Purchase order reference Date of transfer	Mandatory Mandatory Optional (unless the site has the Purchas order reference stipulated as Mandatory) Mandatory

irner											
Sine & Creat	e Another	Save and Close	Oose	Merge Learner							
er First Name 🔸	Wendy			Middle Names			Last Name *			Grange	
	Not Supplied	~		Number	124041		UUN @ +				0
	25/06/2018			Ethnic Origin	Not Supplied	~	Gender *			Female	~
	1										
s Access Re	gistrations	vents Qualifi	cation Set R	Nationality Registrations Cer	UNITED KINGDOM	iers Learner Images   Not	Prevent Learner Data b	eing shared to th	nird parties		
s Access Re Registration Qual/U	pistrations <u>E</u>	vents Qualific	tation Set R	Nationality registrations Cer	UNITED KINGDOM	iers Learner Images Not Centre - Site	Prevent Learner Data b	eing shared to th Status	Standalone	Qualificatio	n Create
s Access Re Registration Qual/U Code	pistrations E nit Tit TQUAL1 gro	vents Qualific de sting Qualificati ups, Pess/Fail ipts) (AUTOTES	on 1 : NQF - Generatec STQUAL1)	Nationality Registrations Cer - (1 pathway, 2 f by 'auto' testing	UNITED KINGDOM Uficates Learner Identif Registration Date 26/06/2018	Centre - Site Auto Test Centre Two (Gr ascripts) - Auto Test Two 5 Tuto Testing caripts (19)	Prevent Learnier Data b tes enerated by 'auto' testing Site One(Generated by 91.001)	Status In Progress	Standalone Registration No	Qualification Set	n Create By ge

Figure 7-26 : Manage learner registrations page with transferred status.

Note: Parnassus will automatically add a note on the Notes tab of the original registration record detailing which user performed the transfer and on which date/time.

**Note:** This can be limited to only transferring mandatory units that are shared on the destination qualification/pathway. This is a Parnassus setting please contact Gordon Associates if you would like this feature to be activated so that units that are optional on the destination qualification/pathway are not transferred.

### **Move Registration**

From Centre	/ Site avril centre - avril site	entered is performed when every g a more.
Centra	00002:ivy Baker	τ.
Site	00002:lvy Baker	+



#### Buttons available are

Dutton	Purpose						
Move	Moves the registration existing registration ent	Moves the registration to the new location. Updates the existing registration entry with the new Centre location.					
Close	Returns to the Edit Qua without moving the reg	Returns to the Edit Qualification Registration screen without moving the registration.					
Field Name	Purpose	Validation					
Centre	The centre name to transfer to	Mandatory					
Site	The site name to transfer to	Mandatory					
Edit Qualification Registration - Two I Save Save and Close Transfer Regis	Units states More Regulation						
Qualification Units PLR Event Info Alternativ	ve Achievement    Entry Requirements    Qualincados Herequistes    Notes (1)						
Qualification   Units    FLR    Event Info    Alternativ	Priority 📑 Save Note						
Qualification Units   PLK   Event Info   Atternativ Attach a File Choose file   No file chosen Note	Priority  Seve Note Seve Note	File Name Added User Priority					

### Figure 7-28 : Manage learner Notes page with moved details.

Note: Parnassus will automatically add a note on the Notes tab of the registration record detailing which user performed the move and on which date/time.



#### **Grade Calculation**

When a learner's Qualification Registration goes "Cert Due", Parnassus calculates the Qualification grade.

Parnassus will use different criteria to decide if the qualification registration is "Cert Due". In simple terms the learner registration needs to pass the Qualification Rules of Combination (RoC). Examples of this are given below.

- Non Credit Based qualification registrations require that a grade has been entered for all registered units and that the number of units being registered is between the min and max units required specified on the pathway.
- Credit Based qualification registrations require that a grade has been entered for all registered units and that the number of units being registered is between the min and max units required and that the Credit attained is between the min and max credit required specified on the pathway.

athway	Ostautt		* 12 M ALC N	heray Advantant.	
thway Cade	Default		Donly in	en selectes graves and units	
anun Unite Assures	7 Hakimur	Lints Recaired	P		
muri Grediti	40. Maximut	CHEF	-0		
nicement Plants Line	-0				
ultitory (A)					Want or Units Second 1
					Winthum Drade 40 Hasimum Drade
					Other Units Constru
		Credit	Level	Unit Tole	Handate
= un	Unit Code				
N Destroyers	Unit Code S2/Unit Is	- 10	1	Groom and Part mental and Th Equipment	*
S featiens	Unit Code S2/Det Sa Konet Sa	10	2	Groom and Plast menos and 76 Equations The emotypies 24 water available distances	*

Figure 7-29 : Qualification Pathway



#### 7.3 View Learners Certificates

Learners Certificates shows a list of the Learners certificates currently issued from within Parnassus.

and the second se								
tone for a trease database	Taxabilities the	Merge Colorer						
Learner Frist Herner 14	Gra		Wittelle Fairmann			-	en Norme V	Tans
794.	Naar Norganiant 🔹 🔻		lea witten	134040		10	** <b>0</b> *	
non «	05-05-11009		$T^{(n)} \in \mathbb{N} \setminus \{0\}^n$	1600 314 (1990)			real h	Persain 🔻
ich.e	[		National Ba-	UNITED EINIDON	*	20	tions Lourier Data pong sharad ta third parties	12
Certificate Number		Batch	Qualificat	ion Title	түрн	Grade	Created	Returned Date
Certificate Number		Batch	Quelficet (83) Sakin	ian Title 9 Stock	Type Na	Grede Pass	Created Involution 12/31/17	Returned Date
Certificate Number Certificate Number		Batch 1200	Que Float	inn Title 9 Stock	Type rut	Grade Pass	Created Inventoria 12 St. 17	Returned Date
Certificate Number titote Unit No anto to copuy		Batch 2300	Quelficat (III) Sakin	lan Tèle 9 Stath	Typ <b>e</b> na	Grada Nun	Created Interaction 12 St. 17	Returned Date
Certificate Number 11708 Unit No data to depay Partial		<b>Batch</b> 2200	Quelficat (82) Satis	ian Titis g Stack	Typ= n.t	Grade Nati	Creaned Learnoid fail at 3 at 17	Peterned Date

Figure 7-30 : View learners certificates page



#### Edit Certificate

Once a certificate is created for a Learner it can be edited in 4 ways.

- Duplicated
- Reprinted
- Replaced
- Returned

Select 💟 to the left of the required entry to edit the create reprints and duplicates.

		Sec. 10	0											
e Save arc	cate Another	save and clos		merge Learner				11 11 1 1 2 1 4 1 4 1 1 1 1 1 1 1 1 1 1				Distance		-
ier First Name	Bally			Middle Names				Last Name *				выюр		
	Mr	~		Number	100000002			ULN @ +						
•	01/01/198	0		Ethnic Origin	White - British		~	Gender *				Maie	~	
8	1		Ĩ.	Nationality	Not Supplied		~	Prevent Learne	er Data being shared	to third par	ies			
ills Access	Registrations	Events Qual	fication Set I	Registrations Cer	rtificates Learner Ic	ientifiers Learne	r Images   No	tes						
ails Access	Registrations	Events Qual	fication Set I	Registrations Cer	tificates Learner Io	lentifiers   Learne	r Images No	tes						
ails   Access rtificates Certifica Number	Registrations	Events Qual Batch Qua	fication Set I	Registrations Cer	tificates Learner Id	lentifiers   Learne	r Images No	tes	Туре	Grade	Created		Returned Date	
ails Access rtificates Certifica Number 115065	Registrations Le	Events Qual Batch Qua 1392 (AUT scrip	fication Set I lification T otestqual1 >)	Registrations Cer Itle ) Testing Qualifica	tificates Learner Id	Sentifiers   Leame	r Images    No ass/Fail - Gen	erated by 'auto' ter	Type sting Full	Grade	Created 20/06/2018 17:26:19		Returned Date	

#### Duplicate / Reprint / Replacement Certificate

Certificates may need to be recreated for various reasons, and the reason has implication which may for example infer certain charges to the Learner of College.

In Parnassus, an issued Certificate can be "Duplicated", "Replaced" or "Reprinted".

- A "Duplicate" implies that the original was lost or damaged, and an EXACT copy is created (with archived information including certificate number, grade and names as they appeared on the original).
- A "**Replacement**" is created exactly the same as a Duplicate, but implies that the Original never reached the Learner.
- A "Reprint" implies that there was a mistake on the issued certificate. It should be
  returned, and Parnassus therefore requires a "Return Date" for the original. The new
  "Reprinted" certificate will be created using the same process as all certificates, i.e.
  will re-calculate their grade and use the names as they appear in Parnassus.

In each case, Parnassus creates a batch with 1 certificate in.

Edit Certificate
Notes
Certificate Return Date (If Applicable)
Purchase Order
Create Reprint Create Duplicate Create Replacement



Buttons available are

Button	Purpose
Save	Saves any data changes.
Create Reprint	Creates new batch details entry to reprint the award certificate. This is typically used when the learners name or other details were incorrect on the original certificate. A new certificate number is generated for reprints.
Create Duplicate	Creates new batch details entry to print a duplicate of the award certificate. This will be an exact duplicate of the original, with the same certificate number, same spelling of learner name and all other details. The original certificate will not be marked as invalid.
Create Replacement	Creates new batch details entry to print a Replacement of the award certificate.
Close	Returns to the View Learners Certificate screen.

Field Name	Purpose	Validation
Purchase Order	Purchase Order number for Centre/Site	Mandatory if Charge Site is selected and the site requires Purchase Orders.
Charge Site /Charge Learner	Who will be charged for the Reprint, Duplicate or Replacement.	Mandatory

**Note:** To create a reprint, a valid Certificate Return Date must be entered. The Purchase Order details are not mandatory if Charge Learner is selected.

#### **Return a Certificate**

If a Certificate is returned, but not immediately recreated, then it can be edited, with a return date, and by clicking "Save" the Certificate is marked as "Returned" in Parnassus.

Save Save & Close Close Delet	e
otes	
earner cheated	
Certificate Return Date (If Applicable)	20/08/2018
Certificate Return Date (If Applicable)	20/08/2018 →
Certificate Return Date (If Applicable)	20/08/2018
Certificate Return Date (If Applicable) Purchase Order	20/08/2018  ▲ August, 2018 → Su Mo Tu We Th Fr Sa 29 30 31 1 2 3 4
Certificate Return Date (If Applicable) Purchase Order	20/08/2018 ★ August, 2018 → Su Mo Tu We Th Fr Sa 29 30 31 1 2 3 4 5 6 7 8 9 10 11
Certificate Return Date (If Applicable) Purchase Order	20/08/2018 ▲ August, 2018 → Su Mo Tu We Th Fr Sa 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18
Certificate Return Date (If Applicable) Purchase Order Create Reprint Create Duplicate	20/08/2018 ★ August, 2018 → Su Mo Tu We Th Fr Sa 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 27 20 20 20 20 20 5

If you confirm you are sure you wish to do this...

ou have supplied a return da	te. This will mark this certificate as invalid
nd recalculate the status of t	his registration. This action cannot be
ndone. Are vou sure vou wis	h to continue?

...the Certificate will be made "invalid" and shown in pink colour to indicate this.

Detaile   Access   Reportations   Sweets   Questions	e Aut Registrations   Gammonie   Las	rear Lister fairs   Learner Listaget   Autor.				
Certificates						
Certificate Number	Batch	Qualification Title	Type	Grade	Created	Returned Date
O 113046	1313	(EE) Buricing Shots	.543	Pase	39/08/3010 13(21) 27	39/09/2018
Unit						
No data in display						
Partial						

#### 7.4 Registrations Upload (Bulk Add Learners)

The "Registration Upload' button on the main "Learners" opens up the "Registration Upload" area of Parnassus. This area allows the creation of Learners and Registration en-masse. This can be done by:

- Uploading a CSV, XLS, XLSX file containing Learner and Registration data into a "virtual" file on the system. Excel files can contain notes, colours, additional worksheets containing instructions and other things which you might want to include in a helpful template that you can send to your centres.
- Creating a blank "virtual" file and adding rows of Learner and Registration data from a single form.

Once uploaded or created, the virtual file can be validated, amended, or news rows added. It can then be validated against data in the live Database, and valid rows can be imported into Parnassus.



The main "Batch Registration Import" page is split into three sections:

_11^	Workflows Cent			Qualification -		Reporting			Admin			
Registrat	tion Upload											
New Import	From File											
Uploaded By C	entre A0			File Name		Search						
Current Fi	ile List											
	File Name		Records	Create	d		Modified			Created By	Centre Code	
0 5 1	sport studies 20082018		0	20/08/2	018 13:45:52		20/08/2018	13:45:52		54		
Files in Pr	ocessing											
	File Name	Records	Cr	eated		Modi	fied			Created By	Centre Code	
0 🗊 🛙	4 rar g	2	22	06/2018 16:55:38		22/06/	2018 16:57:00		- 19	ge		
Files Proc	essed											
	File Name		Records	Creat	ed		Modifier	đ		Created By	Centre Code	
o 🗊	Opicities Test File		1	07/08/	2018 15:35:08		07/08/201	8 15:40:00		paktreeadmin	1276	
O 🗊	ttob with existing learner		19	26/06/	2018 10:50:00		26/06/201	8 10:30/45		52		
0 6	dob issue		t.	26/06/	2018 09 27 08		26/05/201	8 09:34:44		57		
0	3		16	20/06/	2018 16:43:45		20/05/201	8 16:48:30		50		

#### Current File List

- Is where newly created files are shown. From here they can be opened, altered, rows added, validated and sent forward to Processing.
- Files in Processing
  - Is where files added to the system are shown once they have been submitted for import. From here, the Awarding Body users can check the files and make any changes necessary before importing into the main database.
- Files Processed
  - Is where files that have been processed are shown. In this section processed files can be viewed, and will show the Learner code for the learner.

*Note:* When Centre users login to the system they can only see files created for their Centre. Awarding body users (non Centre) can see all files.

#### Direct Import Mode:

Parnassus can be set globally to allow Centres users to bypass the "Files in Processing". Where appropriate, submissions will directly import into Parnassus by the Centre user. This needs careful consideration as it allows Centres to directly input into Parnassus however this can be prevented on a site by site basis. This needs to be set by Gordon Associates.

Centre Duplicates

In previous versions Registration Direct import mode had to be on to allow the use of the setting 'RegistrationImport.CentreDuplicates' (switched on by Gordon Associates). This now works with or without the Direct Import Mode switched on. This displays duplicate learner validation to Centre users; only for associated centre learners; against the learners in Stage 1, which allows the Centre to make the decision on the potential duplicate learner preventing the registration being held in Stage 2 for AO intervention.

Where there are errors detected the file goes to Stage 2 for the AO to resolve the errors. Any valid rows within the file will be processed through to Stage 3, and when the file is viewed in Stage 2 they will appear as processed. This is also reflected in the notification email sent to the Centre User. When the Errors have been resolved the file will automatically move to Stage 3.

*Learner name and address case:* Parnassus can be set globally to change the imported learner name and address to proper case. This will only be applied to a new learner record e.g. an existing learner who has a new registration added will not have the case on their name or address amended from what was already present in Parnassus. This needs to be set by Gordon Associates and the learner name and address case can be managed separately.

### Figure 7-32 : Batch registrations import page

#### Buttons available are

Button	Purpose	
New Import From File		Selects an existing registrations CSV file to be imported into Parnassus. See Section 0.
New Blank Import		Creates a blank "virtual" file, to which data can be added. This allows quick entry of bulk learner and registration data.

Select <sup>2</sup> to the left of the required file to see the Import File details. See section 7.5.

Select <sup>XX</sup> to the left of the required file to delete the file from the "Current File List".

Select <sup>14</sup> to the left of the required file to delete the file from the "Files in Processing".



### **Existing File Upload**

ile: (CSV, XLS, XLSX)	Choose file No file chosen	
lame:		
urchase Order Number		
late:		

Figure 7-33 : Existing file upload in-page popup

#### Buttons available are

Button	Purpose
Import	Select Import will add an empty Import File Details row to the "Current File List".
Close	Returns to the Batch Registrations Import screen.

Field Name	Purpose	Validation
File	Enter the filename, or select Browse and select the CSV file of the registrations you wish to upload from your system.	Mandatory
Name	The name you wish to give the import file. This can be the same as the file name or can be any other name by which you wish to know the file within Parnassus.	Mandatory
Purchase Order Number	Purchase Order Number used by the Link to Finance Starter Kit (Hermes). See Section 19.	Optional
Note	Notes can be added later and updated. Centre users can only add/edit these in stage 1, but admin users can add/edit these in Stage 1 and 2. The notes will appear on the notification emails.	Optional

### **Create Upload File**

Name:	1		
Purchase Order Numbe	r:		
Vote:			
	7	 	

Figure 7-34 : New file upload in-page popup

Buttons available are



Button	Purpose
Import	Select Import will add an empty Import File Details row to the "Current File List".
Close	Returns to the Batch Registrations Import screen.

Field Name	Purpose	Validation
Name	The name associated with the empty Import File Details row.	Mandatory
Purchase Order Number	Purchase Order Number used by the Link to Finance Starter Kit (Hermes). See Section 19.	Optional
Note	Notes can be added later and updated. Centre users can only add/edit these in stage 1, but admin users can add/edit these in Stage 1 and 2. The notes will appear on the notification emails.	Optional

#### Import File Definitions

Parnassus allows Centres to upload candidate registrations direct to Parnassus, the awarding bodies Candidate management system.

- File should be of CSV format as per the included example
- Data is not important positionally, as it is mapped on column heading name
- File Column Headers Are mandatory. The import file treats the first row of data as header information and does not import it. The column header names used are configurable.
- Data is comma delimited. There should be no commas in the data supplied
- There are no text qualifiers for character based data fields. This means text should not be enclosed in quotes or any other qualifying character.
- It is possible to add new data to file during the import process
- Supplied data is validated, only valid data will be accepted by Parnassus

### Import File Definition example

Column Header	Data
FirstName	Timmy
MiddleName	J
LastName	Fox
PreviousSurname	Jones
Dob	12/03/1984
Gender	Μ
Uln	
Scn	
Learner Reg No	
SpecNeed	No
Ethnic	18
CustomEthnic	
Disability	
QualCode	Certificate in Business Management
PathwayCode	Default
QualGroupCode	
UnitCode	
SiteCode	170.001
RegDate	27/05/2012
RegGroupCode	regygroupycode
AssessmentLanguage	ENG
Street1	22 Acacia Avenue
Street2	Hammersmith
Street3	
City	London
County	
Postcode	HA1 1JK
Country	United Kingdom
Qualification-Set Code	ModernApprenticeship101
Nationality	United Kingdom

**Note:** It is possible to customise import file definitions to your rules. The definition shown above is the standard or default definition. Additional information can be recorded; this should be discussed with Gordon Associates to find the best solution.

#### 7.5 Import File Details – Validate and Import

Enables users to edit, validate and process the data uploaded from the Import File "Files in Processing".

Imp	ort File	Details	d New Ros	. L Bounda	an and be	on Dia	Vial Processed Office Non Dealers	5.4																
File D	stalis																							
		Learner Code	Test Narie	Middle Name(s)	Last Name	DOB	Qual. Code	Site Code	[iteg Date]	Reg Group Code	ULN	Gender	Street	Street 2	Street 3	City Coun	y Postcode	Country	Special Need	Ethnic Origin	SCN	Learner Import Id	Unit Group Code	Pathwaj Code
0			Marses		Maffe	80/11/2002	20PE (Two Units - one planned exemption)	1442.001	06/07/202)			Famela							Not Kosyver	No: Suppred		1		Osfauk
0			-tel		trai	01/01/1488	2015 (Just Linits - ane planted exemtion)	1442.001	26/07/2021			Deter							Not Kelown	Not Supplied		27		UstauE
		ios Val	n2 82 80	(e											Search									

Figure 7-35 : Import file details page

Button	Purpose	
Back		Return to the Batch Registrations Import screen.
Revalidate All		Revalidate all data after edit.
Add New Row		Add a new row of data for processing with the existing imported data.
Revalidate and Import		Revalidate all data and then move to "Files Processed". After this you will be able to see the Learners in the main Learners screen.
Hide Valid		Allows the user to hide valid rows whilst fixing validation errors.
Hide Processed		Allows the user to hide rows which have been successfully imported into Parnassus
Hide Centre only Dupilcates		Only shown to Non Centre users (i.e. Awarding Body staff). Will hide found duplicates if these have already been shown to the Centre user. This allows the Awarding Body to assume that the Centre user has dealt with duplicates found at their own sites.
Note		Notes can be added later and updated. Centre users can only add/edit these in stage 1, but admin users can add/edit these in Stage 1 and 2. The notes will appear on the notification emails.

Buttons available are

For Credit Based qualifications, the combination of units being imported should give a total credit value between the minimum and maximum credit values specified for the qualification.

**Note:** The consequences of the user importing a combination of units which doesn't give a total credit value below the Max Credit Value of the associated qualification is configurable to give:

- 1. No Error or Warning User is allowed to make an incorrect combination selection.
- 2. Error User is stopped from making an incorrect combination selection.
- 3. Warning User is warned they have made an incorrect combination selection.

### **Edit Row**

Select  $\bigcirc$  to the left of the required file in the Import File Details screen to edit the details which have been uploaded from the file. The screen now has tab sections for the Registration, Additional Information, Contact Details and Disability and Adjustment to make it easier to find and edit information. For the tab details please see Tab Detail Examples below.

Identifiers		Learner Loo	kup		
Learner Code		Lookup On	Learner Code 🔹	Fin	d Learner
ULN		Lookup Value			
Learner Det	alls				
Title	Not Supplied	Gender	Female 👻	DOB	01/01/1980
First Name	test	Middle Name	test	Last Name	test
RegCustom1		RegCustom2		RegCustom3	
RegCustom1		RegCustom1			
Registration	Additional Information	Contact Details   D	Disability and Adjustment		
Centre	9990:Auto Test Centre	One (Generated by	/ 'auto' testing scripts) *	Registration	20/11/2018
Site	9990.001:Auto Test On	e Site One (Genera	ated by 'auto' testing scr *	-	1
Qualification	AUTOTESTQUAL1:Testi	ng Qualification 1 :	NQF - (1 pathway, 2 gr *	Qualification Set Code	
Pathway Code		Qualification Group Code		Unit Code	
					Include On Award
	in a second s		1	1	

Figure 7-36 : Edit file upload row detail in-page popup

### Buttons available are

Button	Purpose
Save and Close	Saves any data changes and returns to the Import File Details screen.
Save	Saves any data changes.
Close	Returns to the Import File Details screen.

Field Name	Purpose	Validation
Site	Site code	Mandatory
Qualification	Qualification code	Mandatory
Event	Event number (if Events are used)	Optional
First Name	The forename of the learner	Mandatory
Middle Name	The middle names of the learner	No Validation

## Gordon Associates

Last Name	The surname of the learner	Mandatory
Previous Surname	The previous surname of the learner	No Validation
DOB	The learner date of birth	Mandatory
Gender	The gender of the learner	Optional, from selectable values.
ULN	The Unique Learner Number (ULN) is a 10-digit identifier	Optional
SCN	Scottish Candidate Number	No Validation
Learner Code	Parnassus ID for the learner	Optional
Reasonable Adjustments	Disabilities, Yes/No.	Optional, from selectable values.
Ethnic Origin	The group the learner identifies with	Optional, from selectable values.
Other	Further explanation if Ethnic Origin selected is other.	Optional
Disability	Breakdown of learning difficulty/disability.	Optional, from selectable values.
Purchase Order Number	Purchase Order Number used by the Link to Finance Starter Kit (Hermes). See Section 19.	No Validation
Pathway Code	Learners specialisation, also known as route	No Validation
Qualification Group	Qualification Group Code	No Validation
Unit Code	Unit Code	No Validation
Include on Award	Whether the unit is to be included on the qualification award.	No Validation
Registration Date	The date of registration	Mandatory
Registration Group Code	Classification of a group of people doing a qualification at the same time.	No Validation
Assessment Language	The language in which the Learner was assessed.	Mandatory, from selectable values.
Street 1	First line of the Learners address	No Validation
Street 2	Second line of the Learners address	No Validation
Street 3	Third line of the Learners address	No Validation
City	City the Learner is in	No Validation
County	County the Learners is in	No Validation
Postcode	Postal code of the Learner	No Validation
Country	Country the Learner is in	No Validation
Qualification Set Code	If registering for a whole Qualification-Set	Code must exist and be offered by Site.
Learner Only	If checked the row will only update or create the learner rather than creating a registration. Site Code and Qualification Code need to be left blank when adding a learner only	Optional
NI Number	Learner National Insurance Number	Optional unless the NI Number is set as a requirement on a qualification – the number format is validated if it is supplied.
Photo	Learner photo can be uploaded in .jpg or .png format – this can be made a requirement on a qualification	Optional unless set as a requirement on a qualification

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Signature	Learner signature can be uploaded in .jpg or .png format – this can be made a requirement on a qualification	Optional unless set as a requirement on a qualification
Study mode	Part-time or Full-time	Optional

## **Tab Detail Example**

## Registration

Registration	Additional Information	Contact Details	Disability and Adjustment		
Centre	9990:Auto Test Centr	e One (Generated by	/ 'auto' testing scripts) 🔹	Registration Date	20/11/2018
Site	9990.001:Auto Test 0	)ne Site One (Genera	ated by 'auto' testing scr *	r	
Qualification	AUTOTESTQUAL1:Tes	ting Qualification 1 :	NQF - (1 pathway, 2 gr *	Qualification Set Code	
Pathway Code	2	Qualification Group Code		Unit Code	
					Include On Award
Purchase Orde	er Number		Registration Group Code		

#### Additional Information

Registration	Additional I	nformation	Contact Det	ails   D	isability and Adju	stment			
			Previou Surnam	s 1e			SCN		
Ethnic Origin	Not Suppl	lied	* Nationa	ality	UNITED KING	DOM +			
NI Number									
									_
Height	m		ft	în	Photo	No Image i	Found		Add New
Weight	kg		st	ю	Signature	No Image	Found		Add New
Assessment la	anguage	Default		÷	Î				
Study Mode	1	Not Suppli	ed	*	Import Group	1		Ŧ	
Partner Learn Identifier	er (					<u> </u>			

## Contact Details (address is populated if present on existing learner look up)

Registration	Additional Information	Contact Details	Disability and Adjustment	
Work Phone No			Mobile	
Email				
Street 1			County	
Street 2			Postcode	
Street 3			Country	
City			Address Phone No	

## Disability and Adjustment

Disability	99 : Not known/information not *	Learning Disabilities	9 : No information provided by I 💌
Specific Learning Difficulty	99 : Not known/ information not •	Additional Learning Need	99 : Not known/ information not *
Reasonable Adjustments	99:Not Known		

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#### Import File Details Error List

Select <sup>III</sup> to the left of the required record in the Import File Details screen to see the details of any errors found during validation.

Field Name	Error Message	Severity
Qualification Code	Qualification does not exist	Error

Figure 7-37 : Error list in-page popup

#### **Duplicate Detection**

When submitting a Learner registration through import, the Learner may or may not exist in Parnassus. In order to avoid duplicating learners in Parnassus there are some checks to find matching details.

If the Learners details being entered match an existing learner in Parnassus, then the user will be presented with a list of matching learners, and can pick one of these. This only happens when the Parnassus learner code is not included in the import details – otherwise the system will validate with this code.

Duplicate detection is done by matching the following fields in combination:

- First Name if "sounds like<sup>1</sup>" existing first name of learner in Parnassus
- Last Name if "sounds like" existing last name of learner in Parnassus
- DOB must match exactly to be considered a duplicate

All three must match to be considered a duplicate.

Additionally, if previous surname is provided and matches last name in Parnassus this supersedes the last name check.

Once a duplicate has been detected the duplicate icon will display in order to check if the learner registration should be linked to an existing record.

Back	Reva	lidate /	All Valida	ite and Ser	nd Add N
e Detai	ls 🔒				
			Learner	First	Middle
			Code	Name	Name(s)

<sup>&</sup>lt;sup>1</sup> This uses SQL "soundex" technology to find names which sound alike. E.g. Jon and Jonathan can be matched using this technique, as can "Mohammed" and "Muhammed".



Once you have chosen whether to link the registration or create a new learner record the icon will change to a green tick to show you have checked the record.



**Centre Users** will only see duplicates if the existing Parnassus Learner is registered at one of their Centre's Sites. This prevents Centre users seeing details regarding Learners registered at different Centres.

Awarding Body User will see all duplicated in the system.

See *Direct Import Mode* section for information about Learner Duplicate checking and Direct Import Mode.

### Learner Search

You can use this search feature to retrieve a learner's details where they are already saved in Parnassus by searching for them using their Learner Code or ULN.

Learner	Search	
Search On	Learner Code 🔻	
Search Value	124040	Find Learner

Once you have found the learner the mandatory fields in the file are populated for you.

#### 1.3.1 Existing Learner Updates

This feature is managed by a Parnassus setting and you will need to let GA know if you wish this to be available.

If the learner already exists in Parnassus then a new registration will allow the update of the fields:

- ULN
- SCN
- Address
- Email

It will not be possible to remove details already held against a learner via the import routine – e.g. importing a blank email address will not clear the email address held against a learner

The user will be warned if any of the updatable values being imported are supplied but differ from those currently stored against the learner – these will be displayed together with all other registration import warnings an example message would be:

"ULN 1234567890 has been provided for this learner, this will overwrite the currently stored value of 0987654321"

Where an existing ULN for a learner has already been validated via the PLR link updates will not be allowed, the user will be shown an error message rather than a warning.

If the user chooses to continue the fields will be updated – if they do not want a particular field to be updated they will need to delete the value in the import row.

For a file imported from a centre user the warning messages about field updates will only be shown for learners previously registered at one of their centre's sites. The warnings will still be shown to the internal Awarding Bodies users in stage 2 of the import, if Direct Import Mode is being used these rows will be held in stage 2 (just as is currently done for any duplicates that need the AOs attention).

#### **NI Number**

NI Number can be a mandatory field in the registration file. This feature can be turned on/off using a configuration setting by Gordon Associates.

If the NI Number is a requirement at registration then the Centre users will see the following warning where a qualification is requires the NI Number and it is not supplied in the registration file:

Error List		
Field Name	Error Message	Severity
NI Number required	The specified Qualification requires you to enter an NI Number	Error
		Close

The centre must supply the NI Number or give a reason for it not being provided and untick the NI Number required box:

SCN:			
NI Number		🕑 NI Number required	
Reason why NI is not required:	Not Supplied	T	

The row will then have a warning rather than an error and will be able to be imported for AO approval.

Field Name	Error Message	Severity
Accept reason	The Qualification required the Centre to provide an NI Number but it was not available	Warning

The AO user can then approve the reason for the omission of the NI Number either on the individual row or by using the button 'Accept all NI not available reasons' to approve the whole file as below.

Impo	rt File	Details																								
Beck	Resul	idane Al	Sdd New B	w Rewi	idate and In	iport Rep	et File Accept ell I	(Friot and Int	the reasons	inice Val	a Date	Centre bal	Diplicate	e Mersten	focensed											
File Deta 1 process	li ed lines a	ere hidden, us	e the check	box above to	display the	se rows.																				
		Learner Code	First Name	Middle Name(s)	Last Name	800	Qual. Code	Site Code	[Reg. Date]	Reg Group Dode	ULN	Gender	Street	Street 2	Street 3	City	County	Pestcode	Country	Special Need	Ethnic Origin	SON	Learner Import Id	Unit Group Code	Pathway Code	Unit Code
0	3	ŧ	Maya		ни	16/06/1000	Autorestiquest (Petring Qualification 1.) NQF - (1 pathway, 2 groups PeterFact Senemed by Nutri testing scripts)	5090.001	20/08/2019			Famala								Not Khown	Not Supplied		1			
Total Valid Inotic Duplices Procesp Remain	2 1 1 0 0 1 1 1 1	0 5.																								

#### Photo and Signature

Learners can have a photo and/or signature saved with their details. This can be made a requirement for a qualification. In the edit item for the registration you can use the Add New button to browse and upload the image you wish to save. The image needs to be a .jpg or .png file format. These details are accessed on the Additional Information tab.

			Previo Surna	us me		SCN		
Ethnic Origin	Not Supp	lied	* Nation	ality	UNITED KING	SDOM +		
NI Number								
Height	m		ft 🗌	] in	Photo	No Image Found		Add New
Weight	k	9	st	в	Signature	No Image Found		Add New
Assessment l	anguage	Default		,	-)			
Study Mode		Not Suppl	ied		Import Group	1	*	
Partner Learn Identifier	ier				]	24	90. 	

If the image file is in the wrong format you will see this error:

File (nog ineg)	Channe file Min file shearen		
riie (biiß, Jheß)	Choose file No file chosen Uplo	ad	

If the image size is too large you will also see an error.

If the qualification the learner is registering on has the photo or signature as a requirement then you will see this error:

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If you do upload an image then you can view or delete it in the edit item screen:

Photo:	Jlo.jpg	*	View
Signature:	amber-signature2.png	×	View

## **Delete Import File Details**

Select <sup>¥</sup> to the left of the required record in the Import File Details screen to delete the details which have been uploaded from the file.

Are you s	ure you w	ant to delete	this item?		
			_		
				OK	Cancel

## Figure 7-38 : Confirmation of deleting a file

Select OK, to delete, otherwise cancel the deletion.

## Add New Row

Identifiers		Learner Lool	kup				
Learner Code		Lookup On	Learner Code		Find	Learner	
ULN	( 	Lookup Value					
Learner Det	ails						
Tide	Not Supplied	▼ Gender	Female	*	DOB		
First Name		Middle Name			Last Name		
legCustom1		RegCustom2			RegCustom3		
RegCustom1		RegCustom1		1			
Registration	Additional Informatio	n Contact Details D	isability and Adjustmen	t			
Centre	9990:Auto Test Cer	ntre One (Generated by	'auto' testing scripts)	*	Registration	10/12/2018	
Site	9990.001:Auto Tes	t One Site One (Genera	ted by 'auto' testing scr		Date		
Qualification	Unknown			٠	Qualification		
Pathway Code		Qualification			Unit Code		
		Group Code				Include On Av	vard
Purchase Orde	r Number		Registration Group Co	de			

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### Figure 7-39 : New File Upload row popup

#### Buttons available are

Button	Purpose
Add & Close	Saves any data changes as a new Item/Row. Screen is not closed, which allows the reuse of keyed data where records to be entered contain similar data. This means the user can quickly enter a group of learners for the same qualification, site etc.
Add New Row	Saves any data changes as a new Item/Row. Screen is closed and returns the user to the Import File Details screen.
Clear	Clears all details from the Add Item popup.
Close	Returns to the Import File Details screen.

**Note:** If the Import File Details screen has been accessed from a set of details within the "Files Processed" list, the details shown will be read-only.

Deleting or editing the details which have been uploaded does not affect the details contained in the original upload file.

## Import File Details – Revalidate and Import

Import	File (	Details	Marinas																											
Te Dataile			AND THE	on Lon			66 V6 11 6/11 04 +12 0411																							
		Learner Code	First Name	Midcle Names)	Last Name	008	Qual. Code	Site Code	(Reg. Date)	Keg Group Code	ULN	Gender	Street	Street 2	Street 3	City Co	nty Po	stcode	Country	Special Need	Ethnic Ortgin	SCN	Learner Import Id	unit Group Code	Pathway Code	Unit Code	Purchase Order	Qualification Set Code	Learne Only	Ha Ft
0			Orie		Hapters	1625/7998	AUTOTELTQUALT (Pesting Qualification 1: KQP - (1: parturage 2: provids: Pattor Fail Generated by multi patting strated)	9992.001	integra			Terrate								Aut Icheven	kas Superes		÷							

Enables users to edit, validate and finally process the data uploaded from the Import File.

## Figure 7-40 : Import file details page

## Buttons available are

Button	Purpose	
Back		Return to the Batch Registrations Import screen.
Revalidate All		Revalidate all data after edit.
Add New Row		Add a new row of data for processing with imported data.
Revalidate and import		Validate data and send into main Parnassus database and then move to "Files in Processed". After this you will be able to see the Learners in the main Learners screen.

Reject File	Removes the data from "Files In Processing" and returns it to the "Current File List". The reject information is now saved with the reason for the rejection. Most recent reason is shown at the top
Hide Valid	Allows the user to hide valid rows whilst fixing validation errors.

Select >> to the left of the required file in the Import File Details screen to edit the details which have been uploaded from the file. See section 0.

Select <sup>¥</sup> to the left of the required record in the Import File Details screen to delete the details which have been uploaded from the file. Select OK, to delete, otherwise cancel the deletion.

#### Where a file was rejected the reason for rejection is shown as below.

a the Hauwindow All Add New Yow. Hevelefore and Is	Nport Accept all NI not evaluable reason	Childe Valid Childe Centre only Duplicates. Childe Processed Childe Non Duplicates	
Details	Most Recent Return Reason	muran resean 1	Vew Return Reason
		View Return Reasons	

Parnassus automatically sends an email to the centre that has uploaded an import file. This email can be customised (by GA staff) to your preferred format. It can also include logos and other images.

#### 7.6 Registering on Qualification Sets

Qualification-Sets allow learners to be simultaneously registered on multiple related Qualifications, such as those that make up an Apprenticeship.

Setting up Qualification-Sets is detailed in the Qualification Maintenance section of the user manual.

Once Qualification Sets have been properly set up in Parnassus, and a record of these being offered by appropriate Sites, it is possible to register Learners on the Qualification-Set. As with Qualifications, the Site at which the Learner is registered must also be recorded.

*N.b. It is only possible to register for Qualification-Sets through bulk-registration. There is no manual equivalent process.* 

#### To Register a Learner on a Qualification-Set

>> In the Registration File

The "Qualification-Set" column should be included in the file, and where applicable that column should contain the "Qualification-Set-Code" for the Learner in that row.

#### Example

Learner Code			кир		
CR MU		Lookup On	Learner Code 🔹 👻	Fin	d Learner
ULIN		Lookup Value	[		
Learner Details					
Title No.	ot Supplied 🔷 👻	Gender	Female *	DOB	
First Name		Middle Name		Last Name	
RegCustom1		RegCustom2		RegCustom3	1
RegCustom1		RegCustom1			
Registration Add	itional Information	Contact Details	isability and Adjustment		
Centre 95	990:Auto Test Centre (	One (Generated by	'auto' testing scripts) *	Registration	10/12/2018
Site 95	990.001:Auto Test One	e Site One (Genera	ted by 'auto' testing scr 🔻	Date	
Qualification	nknown		¥	Qualification Set Code	Q51
Pathway Code		Qualification	ĺ.	Unit Code	
0.				37	Include On Award
Purchase Order No	umber		Registration Group Code		

One row in the import file for a Learner, with the Qualification Set code "QS1" included:

## Parnassus will split the Qualification-Set Registration into its constituent Qualification Registrations.

#### Example

If the Qualification-Set has two constituent Qualifications, then when the file is imported (or a new line is added) then Parnassus will split the Registration into two Qualification Registrations.

lm Ba	port File ck Revali	Details	S Add New Ro	w Revalidate and In	nport BH	ide Valid 🕅 Hic	ie Processe	à																		
File D	etails																									
rst ame	Middle Name(s)	Last Name	DOB	Qual. Code	Site Code	[Reg. Date]	Reg Group Code	ULN	Gender	Street 1	Street 2	Street 3	City	County	Postcode	Country	Special Need	Ethnic Origin	SCN	Learner Import Id	Unit Group Code	Pathway Code	Unit Code	Purchase Order	Qualification Set Code	11.00
ger		Woods	18/03/1999	AUTOTESTQUAL1 (Testing Qualification 1 : NQF - (1 pathway, 2 groups, Pass/Fail - Generated by 'auto' testing scripts))	9990.001	22/08/2018			Male								Not Known	Not Supplied		1					Q51	
ger		Woods	18/03/1999	AUTOTESTQUAL2 (Testing Qualification 2:NQF-(2 pathway, 3 groups ABCD, Pre Reg) - Generated by 'auto' testing scripts))	9990.001	22/08/2018			Male								Not Known	Not Supplied		1					Q51	
4			_																							

Two registrations created from one row, both will show Qualification-Set "QS1".

When these records are imported into Parnassus, they are treated in every way the same as any other individual registration. All other business rules regarding expiry etc. will remain the same and are not over-ridden by information pertaining to the Qualification-Set.

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earner										
ave Save & Create Anot	her Save and Close Close Me	rge Learner								
amer First Name *	Roger	Middle Names				Last Name *		Woods		
e	Not Supplied	Number	124045			ULNO +			0	
2B *	18/03/1999	Ethnic Origin	Not Supplied		×	Gender"		Male		
Ne		Nationality	Not Supplied			Prevent Learner Data being shared to third p	arties			
etails Access Registrat	ions Events Qualification Set Regist	ations Certificates Learner	Identifiers   Learne	r Images    Notes				erendet ere	0.117.01	
Qual/Unit Code	Title			Registration Date	Centre - Site		Status	Registration	Qualification Set	By
📀 🙀 AUTOTESTQUAI	L2 Testing Qualification 2 : NQF - (2 p by 'auto' testing scripts) (AUTOTES	athway. 3 groups. ABCD. Pre Re TQUAL2)	iq) - Generated	22/08/2018	Auto Test Centre One (Generated by 'auto'	(Generated by 'auto' testing scripts) - Auto Test One Si testing scripts) (9990.001)	e One In Progress	No	Q51	avcentre
AUTOTESTQUAI	Testing Qualification 1 : NQF - (1 p testing scripts) (AUTOTESTOUAL1)	athway, 2 groups, Pass/Fail - Ge	enerated by 'auto'	22/08/2018	Auto Test Centre One (Generated by 'auto'	(Generated by 'auto' testing scripts) - Auto Test One Sir testing scripts) (9990.001)	e One In Progress	No	Q51	ga

Qualification Registrations created as implied by Qualification-Set Registration

There is a record of the Qualification-Set registration for the Learner, but this is for information only. It is not updated, or "update-able". The Qualification-Registration can only be deleted when all related Qualification Registrations are deleted first.

Learner										
Save 5a	we & Create	Another Save	and Close	Close Me	arge Learner					
Learner First	Name *	Roger		9	Middle Names	[	9		Last Name *	Woods
Title		Not Sup	ilied 🔻		Number	124045			ULNO +	[
DOB*		18/03/19	99		Ethnic Origin	Not Supplied		•	Gender*	Male
SCN 📵					Nationality	Not Supplied		•	Prevent Learner Data being shared to third parties	D
Details Ac	ccess Reg	strations Even	Qualificatio	on Set Regist	crations Certificates Learner	Identifiers   Learner Ir	mages Notes			
	Code	Title	Registratio	n Date	Centre - Site					Transferre
0 #	QS1	Qual Set 1	23/08/2018		Auto Test Centre One (Ger	erated by 'auto' testing	g scripts)-Auto Test (	One Site One (Ge	enerated by 'auto' testing scripts) (9990,001)	

Qualification-Set Registration shown, for information only.

#### Qualification-Set Registrations: Scenarios

Because the Learner may already be registered on one or more of the constituent Qualifications when the Qualification-Set is registered, there are a number of scenarios which may be applicable.

### Scenario 1

The learner is not registered on any of the Qualifications which make up the Qualification Set they are to be registered on.

#### Parnassus will...

...register the learner for all the qualifications on the Qualification Set and record the fact that these qualification registrations where registered via the Qualification Set. As detailed previously.

### Scenario 2

The Learner is already registered on one, more or all Qualifications which make up the Qualification Set they are to be registered on. The state of these registration(s) is "**In Progress**".

#### Parnassus will...

...register the learner for any Qualifications on the Qualification Set for which they're not already registered and link their existing "In Progress" registration(s) to the new Qualification Set Registration.

Any existing registrations must be at the same site as the Qualification Set Registration, if not an error should be displayed, and the Apprentice registration not allowed.

## Scenario 3

The Learner is already registered on one, more, or all of the Qualifications which make up the Qualification Set they are to be registered on. The state of at least one of the registration(s) is **"Complete" or "Cert Due**".

*Note:* You can alter the behaviour of the qualification set registration for existing Completed registrations by contacting Gordon Associates to change the setting as explained below.

### Default Behaviour:

### Parnassus will...

...register the Learner on any Qualifications they're not already registered on "standalone", do not create any "Qualification Set Registration" or "link".

Any existing registrations must be at the same site as the Qualification Set Registration, if not an error should be displayed, and the Qualification registrations allowed.

## Alternative Behaviour (Setting changed by Gordon Associates): Parnassus will...

...allow a qualification set to be registered for all the qualifications on the Qualification Set for the learner despite the presence of Completed qualifications that are part of the new Qualification Set and record the fact that these qualification registrations where registered via the Qualification Set.

### 7.7 Achievement Upload

Enables the upload of grade details from files held in CSV, XLS, XLSX format. Excel files can contain notes, colours, additional worksheets containing instructions and other things which you might want to include in a helpful template.

The 'Current File List' section is normally used by external users such as centres and the 'Files In Processing' section is normally used by internal staff, and is seen as a quantitative area to review files submitted by centres. When a user clicks 'Validate and Send' in the Files in Processing section, the records are submitted to the main Parnassus database. 'Files processed' provides a history of import files previously processed. Centres can return to 'Files Processed' to see the Learner Numbers that have been allocated to their Learners.

When importing a file of grades/achievement, it is possible for the centre to request an additional check to verify whether the learner(s) are now able to receive a certificate. This Certificate Request Validation would be performed in the background and would assess the grade upload file along with any existing registrations and grades. Please see section 8.9.10 and ask GA for further details.

For additional guidance on uploading achievements you can view our video:

Parnassus Quick Start Guide to Batch Achievement Upload

**Note:** If a minimum assessment age has been set for a qualification then a warning will be shown where a learner has not yet reached the minimum assessment age.

Achieve	ement O	pioad					
New Impo	ort From File	New Blank Import Create Import from Quick Grade	Entry				
in the state of Party	-		•				
ipioaded by	Centre All		• File Name	Search			
Current	File List						
	File N	ame	Records	Created	Modified	Created By	Status
0 #	Alt Edd	e Alt Test	4	11/07/2018 16:31:22	11/07/2018 16:31:46	ga	Awaiting Validation
0 #	3208 - /	Achievement:	12	07/09/2016 16:12:21	10/07/2018 13:29:45	Paul4-8Centre	Editing
0 #	324234		2	21/02/2018 11:05:43	21/02/2018 11:05:43	ga	Editing
0 #	validati	on test	7	20/09/2017 16:36:51	20/09/2017 16:36:51	CrisCentre	Editing
0 #	Cert Re	q Val Test	2	02/03/2017 14:58:58	02/03/2017 16:20:36	ga	Awaiting Validation
0 #	Test PC	Mandatory functionality	1	17/10/2016 11:49:46	17/10/2016 11:49:46	ga	Editing
0 #	TopN		11	15/08/2016 15:48:26	15/08/2016 15:48:26	ga	Editing
0 #	922-00	#3414	0	25/07/2016 17:21:51	25/07/2016 17:21:51	ga	Editing
0 #	multi o	ne with pathway3	6	25/07/2016 14:10:35	25/07/2016 14:10:35	ga	Editing
0 #	shania		0	25/07/2016 11:31:23	25/07/2016 11:31:23	ga	Editing
Files in P	Processin	g			1 2 3 4 5	678910	
	F	ile Name	Records	Created	Modified	Created By	Status
0 #	a N	lefty.	0	06/12/2017 12:02:15	06/12/2017 12:04:24	martymcfly	Needs EV Approval
0 #	N N	luppetyMuppet	0	06/12/2017 11:49:06	06/12/2017 11:53:29	ga	Needs EV Approval
0 #	Dr L	&: F	2	01/10/2015 16:06:32	01/10/2015 16:08:18	ga	Assigned to EV Damian
0 #	🖬 si	te no ampersand ev	2	01/10/2015 15:12:18	01/10/2015 15:14:51	ga	Assigned to EV Damian
0 #	G? e	mail ev	2	01/10/2015 15:02:08	01/10/2015 15:05:01	ga	Assigned to EV Damian
0 #	u	nit missing	2	18/09/2015 11:35:08	18/09/2015 11:35:14	ga	Processing
0 #	3	117	2	18/09/2015 11:19:17	18/09/2015 11:21:05	ga	Processing
0 #	3	079 1	1	03/09/2015 12-34:07	03/09/2015 12:35:34	ga	Processing
0 #		ist darren	1	22/05/2014 12:23:44	18/08/2014 14:00:33	DarrenCentre	Processing
	G	rade Import File Test (CACHE)	2	19/11/2013 10:28:33	19/11/2013 10:45:56	GA\darren	Processing
Files Pro	cessed						

## Figure 7-41 : Achievement Upload page

#### Buttons available are

Button	Purpose	
New Import From File		Selects an existing grades CSV file to be imported into Parnassus. See Section 0.
New Blank Import		Creates a grades CSV file to be imported into Parnassus. See Section 0. You would use this screen as an alternative method of quickly entering a batch of learners and registrations.
Create Import from Quick Grac	le Entry	Creates a grades CSV file to be imported into Parnassus. See Section 0. Use the Quick Grade Entry criteria to select the learners to be included in the file.

Select  $\bigcirc$  to the left of the required file to see the Import File details. See section 7.5.

Select <sup>14</sup> to the left of the required file to delete the file from the "Current File List".

Select <sup>X</sup> to the left of the required file to delete the file from the "Files in Processing".

Select status is: "Needs EV Approval". See Section 0.

Note: When EV Approval is enabled, a batch cannot have multiple sites or qualifications.

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**Direct Import Mode:** Parnassus can be set globally to allow Centres users to bypass the "Files in Processing". Where appropriate, submissions will directly import into Parnassus by the Centre user. This needs careful consideration as it allows Centres to directly input into Parnassus. This needs to be set by Gordon Associates. The EV approval process works in the same way when the Achievement Direct Import Mode is switched on.

## **Existing File Upload**

ile: (CSV, XLS, XLSX)	Choose file	No file chosen
lame:		
urchase Order Numbe	-	
ote:		



## Buttons available are

Button	F	Purpose	
Import		Select Import will add an empty In the "Current File List".	nport File Details row to
Close		Returns to the Achievement Uploa	ad screen.
		Choose the file to upload	
Field Name	Purpose		Validation
	Enter the	fileneme, er eelest Browse	Mandatan
File	and sele	t the CSV file of the grades you pload from your system.	Mandatory
Name	The nam This can can be a wish to k	e you wish to give the import file. be the same as the file name or ny other name by which you now the file within Parnassus.	Mandatory
Purchase Order Number	Purchase to Finance Section	e Order Number used by the Link ce Starter Kit (Hermes). See 19.	Optional
Note	Notes ca Centre u stage 1, these in appear c	n be added later and updated. sers can only add/edit these in but admin users can add/edit Stage 1 and 2. The notes will on the notification emails.	Optional

#### **Create Upload File**

## Gordon Associates

lame:	L		]	
ourchase Order N	Vumber:			
lote:				

Figure 7-43 : New file upload in-page popup

## Buttons available are

Button	Purpose
Import	Select Import will add an empty Import File Details row to the "Current File List".
Close	Returns to the Achievement Upload screen.

Field Name	Purpose	Validation
Name	The name associated with the empty Import File Details row.	Mandatory
Purchase Order Number	Purchase Order Number used by the Link to Finance Starter Kit (Hermes). See Section 19.	Optional
Note	Notes can be added later and updated. Centre users can only add/edit these in stage 1, but admin users can add/edit these in Stage 1 and 2. The notes will appear on the notification emails.	Optional

### **Import File Definitions**

Parnassus allows Centres to upload candidate grades direct to Parnassus, the awarding bodies Candidate management system.

- File should be of CSV format as per the included example
- Data is important positionally, not mapped on column heading name
- File Column Headers Are optional. If included the import file treats the first row of data as header information and does not import it
- Data is comma delimited. There should be no commas in the data supplied
- There are no text qualifiers for character based data fields. This means text should not be enclosed in quotes or any other qualifying character.
- It is possible to add new data to file during the import process
- Supplied data is validated, only valid data will be accepted by Parnassus

## Import File Definition example

Column Header	Data
Learner Code	499148
Partner Learner Identifier	PL123
Event Number	6578
Qualification Code	HDN2
Qualification Group Code	

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Pathway Code	
Unit Code	HDUG7
Grade	Pass
Assessment Date	10/06/2009
Request Full Certificate	0
Request Partial Certificate	1
Request Unit Certificate	0
IncludeOnAward	1
PurchaseOrder	
SiteCode	
FirstName	
LastName	
Custom1	
Custom2	
Custom3	
Custom4	
Custom5	
ElementCode	
IsAlternativeAchievement	
Planned Exemption Code	Exemption1
Equivalency Code	Equiv1
Exempting Qualification	Qual1
Exempting Units	Unit1, Unit2, Unit3
ReleaseDate	

## **Import File Details**

See section 8.7 Import File Details – Validate and Import and section 8.8 Error! Reference source not found.. grade

#### Assign EV To Grade Import File

If a file is submitted for a site and qualification that doesn't have direct claims in CRM/Parnassus, then Parnassus will attempt to allocate an EV to this file.

#### 1.3.1.1 Automatic Assignment

If the matching EV user is found, the file status will be displayed as assigned to the EV e.g. 'Assigned to EV John Smith'.

File	s in	Proce	essing							
			File Name	Records	Created	Modified	Created By	Status	Centre Code	Cen
0	32		McBy	0	06/12/2017 12:02:15	06/12/2017 12:04:24	manymcfly	Needs EV Approval	994444	Marg
0	st	ia.	MuppetyMuppet	0	06/12/2017 11:49:06	06/12/2017 11:53:29	ga	Needs EV Approval		
0	Ħ	R.	L & F	2	01/10/2015 16:06:32	01/10/2015 16:08:18	B <sup>a</sup>	Assigned to EV DamianEV		
0	35		site no ampersand ev	2	01/10/2015 15:12:18	01/10/2015 15:14:51	ga	Assigned to EV DamianEV		
0	32		email ev	2	01/10/2015 15:02:08	01/10/2015 15:05:01	- ga	Assigned to EV DamianEV		

### Figure 7-44 : Automatic assignment of EV

### 1.3.1.2 Manual Assignment

If there isn't an EV allocated to the site/qualification or multiple EVs are allocated or an EV user doesn't exist in Parnassus, the file will not be automatically assigned and the status will be 'Needs EV Approval'. In this scenario an icon will be displayed to enable the user to manually assign to an EV user.

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## Select it assign an external verifier.

File	es in	Proce	essing						
			File Name	Records	Created	Modified	Created By	Status	4
0	N	12	ev again	3	18/09/2018 15:29:15	18/09/2018 15:39:47	adminav	Assigned to EV evay	
0	×	12	мену	8	06/12/2017 12:02:15	06/12/2017 12:04:24	inartymethy	Needs EV Approval	1
0	×	й.	MuppetyMuppet	0	06/12/2017 11:49:06	06/12/2017 11:53:29	.84	Needs EV Approval	
0	×		L & F	2	01/10/2015 16:06:32	01/10/2015 16:08:18	ga	Assigned to EV.DamianEV	

Figure 7-45 : File Needs EV Approval

External verifiers will need to be set up by Gordon Associates for any Sites which have not got a Direct Claims Status of approved. The verifiers associated with the site will then appear for selection. See Figure 7-48 : Grade Import Files Assigned To EV

Assi Close	gn EV To Grade Import i	File
aigne	d EV: This file does not have User Name	an IV assigned E-Mail
0	esav	avril@gordonassociates.co.uk



Buttons available are

Button	Purpose
O	Select an external verifier for the Grade Import File, from those set up for the centre.
Close	Returns to the Achievement Upload screen.



Figure 7-47 : EV Assigned

The External Verifier will be sent an email letting them know that a file has been assigned to them. The External verifiers will then be required to Login and approve any files assigned to them.



## **External Verifier Approval**

When the External verifier has Logged In they will be shown all of the Grade Import Files assigned to them for approval.

Achieve	ment Upload					
Uploaded By	Centre All		▼ File Name	Search		
Files in P	rocessing					
	File Name	Records	Created	Modified	Created By	Status
0	ev again	3	18/09/2018 15:29:15	18/09/2018 15:39:47	adminav	Assigned to EV evay

## Figure 7-48 : Grade Import Files Assigned To EV

#### Buttons available are

Button	Purpose
$\mathbf{O}$	Select a Grade Import File to approve.

mport	t File L	Details											
No.	Tevels	fain A2 Add New Row	Approve The	taliet verification - Eliz	the Vacua								
Decails													
		Learner Code	First Name	Lest Name	Site - Qualification	Unit Code	Unit	Grade	RequestFull	RequestPartial	RequestUnit	Contributes	PO Number
>	н	120343	Gitta	Tale	954333) - Dunning Shods	21.Ma	ILM.	Patri	×			8	
>	38	12/010	Gha	Title	954.001 - Dutting Theds	21,02	21.0	Pino	*			*	
	12	120300	GHA	Tala:	West Mill - Berlinker Thurld	20.00	- 202	- Date of	~				

## Figure 7-49 : External Verifier Approval

### Buttons available are

Button	Purpose
0	Edit the Import File details.
×	Delete the Import File details.
Back	Returns to the Achievement Upload screen.
Revalidate All	Revalidate all the details to be imported.
Add New Row	Add a new row of details to be imported.
Approve File	Mark the file as being approved for upload. The status of the file is changed to 'EV Approved' and a change of status to approved email is generated.
Failed Verification	Mark the file as being failed verification for upload.
Hide Valid	Allows the user to hide valid rows whilst fixing validation errors.

Once the file has been approved it can be imported into Parnassus as usual by users.

#### **Achievement Batch Summary Report**

If you have this setting enabled (please speak to GA if you require it) then a summary icon will appear on the batch grade screen as below.

Ach	niev	em	ent Upload		
Nes	w Imp	ort Fr	rom File New Blank Import Co	eate Import from Quick Grade Entry	
Jpload	ded By	(Cen	tre 1302:Avril's Super Centre	* File Name	Search
Curi	rent	File	₂ List		
			File Name	Records	Created
0	s	Ħ	cherry cola grade assoc site 001	3	01/10/2019 16:20:50
0	5	×	mary urber grades	3	30/09/2019 16:09:35
-	63	52	dup unit grades in file	6	23/09/2019 16:32:28

If you click on the Summary icon you can view the batch summary – example below:

View Achie	evement Sum	imary						
	< 1 of	1 >	0 I⊲	© [	100% *		<b>₽</b>	
Batch G	rade Sumi	mary Re	port					
File Name	Created	Modified User	First Name	Middle Name	LastName	Learner Number	Partner Learner Identifier	Site C
mary urber grades	30/09/2019 16:09:35	AvrilAdmin	Mary		Urber	134828		1302.0
10-01	20 100 1004 0	and shall be a			111	10.0000	1	4000.00

## **Certificate Request Validator**

This feature needs to be installed by GA and will allow grade files submitted by Centres to be checked to ensure they will result in a Certificate being issued.

When a grade file is submitted for import by the centre the status will become 'Awaiting Validation' until the background job selects and checks the file – as shown below.

Current File List							
File Nattie	Records	Created	Modified	Created By	Status	Centre Code	Centre Name
S 🕺 🙀 the grade televice		17/12/2010/14/12/18	12/12/2010 15:45:25	septon	Anuto a Verdecen	1944	Clarker the (1944)

If the file does not have the necessary grades for a registration to become Cert Due then the file will be returned to the top stage for current files with the status of 'Editing'.

Current File List					
File Name	Records	Created	Modified	Created By	Status
😒 🗿 🕱 grade validator 2	4	17/12/2019 15:48:38	17/12/2019 15:50:55	citycen	Editing

The centre can view the rows that have an error message.

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Impor	t File D	etails					
Back	Summa	ry Report	Revalidate All	Validate and Send	Add New Row	lide Valid	
File Details	6						
		Learne	r Code	First Name	Last Name	Site - Qualification	Unit Code
0	×	135023		Flora	White	1344.001 - Printing Skills	AutoTestUnit002
0 1	*	135023		Flora	White	1344.001 - Printing Skills	AutoTestUnit001
0	×	135021		Daisy	Green	1344.001 - Printing Skills	AutoTestUnit001
0	×	135021		Daisy	Green	1344.001 - Printing Skills	AutoTestUnit002

And see the error message by clicking on it.

Revalidate and Import

Field	Frror Message	Severit
Name	En or Message	Seveni
Request Full	Invalid certificate request: This learner has not completed the correct combination of units to complete this qualification.	Error

Once the file is validated by the background job it will move to the middle stage and have the status 'Processing'.

Files in F	Processing					
	File Name	Records	Created	Modified	Created By	Status
0 #	test grade validator	6	17/12/2019 14:12:15	17/12/2019 15:45:54	citycen	Processing

Once the file is in the middle processing stage the AO user can either import the grade file or return the grade file to the centre for further changes to be made.

Files imported where the Direct Claims Status has expired will have a status set to DCS Expired and the Centre user will receive an email confirming the C+DCS Expiry. The AO user can choose to import the file if they wish.

Files	in F	Proc	cessi	ing							
				File Name	Records	Created	Modified	Created By	Status	Centre Code	Centre Name
0	ŝ	ж		PTBGIDIM - Expected Outcome Suspe	1	03/10/2019 10:46:54	03/10/2019 10:47:05	GA	Needs EV Approval		
0	ŝ	×		2158 - Parnassus Testing - EV - Grade	1	03/10/2019 10:05:33	03/10/2019 10:06:01	MattAutoTestCentre	Needs EV Approval	9990	Auto Test Centre One (Gen
0	ŝ	×		tizer cup grades no emails	2	01/10/2019 13:20:18	01/10/2019 13:21:07	centreav	Assigned to EV evev	1302	Avril's Super Centre (1302)
0	6	×		PUG2019_Grade_Upload_TFS3050_EV	5	24/09/2019 00:15:20	24/09/2019 00:15:37	PUG2019 AO Admin	DCS Expired		
0	ŝ	×		RequiresUUNCheckSeverity	2	20/09/2019 15:43:47	20/09/2019 15:47:53	GA	Processing		
0	8	×		EV Test 1	1	20/09/2019 10:36:45	20/09/2019 11:38:38	MattCentre	Assigned to EV MattEv	1301	Matt Test (1301)

If you return the file you can record the reason for the return and this is shown in the file summary as below.

Import File Details			
Sack Summery Report Resultdate All	Valsdate and Send Add New Row	d	
File Details	Most Recent Return Reason	Check on learner dob	Weer Return Researce
			View Return Reasons

The details of the return(s) for the file can be viewed by clicking the button:

**Return File** 

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## 7.8 Quick Grade Entry

Quick Grade entry allows for administrators of the Parnassus System to grade a group of learners in one hit, rather than having to grade them individually.

## Quick Grade Entry – Search

The Quick Grade Entry screen enables the user to search for a Learner or group of Learners, based on the selected criteria, and rapidly enter a series of grades for their units.

	Workflows	Centres	Venues	Learners	Qualification -	Certificates	Reporting	Contacts
Quick Grade E	Entry							
Event Number		Fi	nd					
	000001					-		
Centre	00002:105	Baker				•		
Site	Select Si	te						
Qualification						*		
Unit						*		
Reg Group Code	All					•		
·							-	
Default Date	10/09/20	18						
Default Grade	- No Gri	ade Entered				×		
Default Certificate Rec Select Learners	Back	rtificate	🗐 Partia	l Certificate	Unit Certificate			

## Figure 7-50 : Quick grade entry page

#### Buttons available are

Button	Purpose	
Select Learners		Display the results of the search, based on the entered selection criteria.
Back		Return to the Learners search screen.

Field Name	Purpose	Validation
Event Number	The event to search by	No validation
Centre	The centre name to search by	Mandatory
Site	The site name to search by	No Validation
Qualification	The qualification name to search by	Mandatory
Unit	The unit to search by Note: 'No Show' grades can be hidden by a setting if required	No Validation
Reg Group Code	Reg Group Code to search by	No Validation
Default Date	Default Date to be used during data entry	No Validation

Default Grade	Default Grade to be used during data entry	No Validation
Default Certificate Request	Indicates whether the learner has requested a certificate	No Validation
Full Certificate	Certificate for a qualification	No Validation
Partial Certificate	This certificate lists the achievement of unit, or units, achieved by the learner	No Validation
Unit Certificate	This certificate lists the achievement of unit achieved by the learner	No Validation

## Quick Grade Entry – Select Learners

Displays learners available for grade entry, based on the entered selection criteria. You may click on any column heading to specify sort order.

ληι	ck Grade Entry				
elect	t the learners you wis s for approximately 50	ih to enter results. Diearners can be er	for itered at a time		
0	Learner Code	First name	Last name	DOB	Registration Date
0	124037	Nancy	Dell'ortiago	22/06/1990	05/09/2018
100	124036	Mia	Dell'Uomo	22/08/1999	05/09/2018

## 7-51 : Quick grade entry – Select Learners page

### Buttons available are

Button	Purpose					
Enter Grades	Enter Grades for the selected Learners.					
Back	Returns to the Quick Grade Entry screen.					

## Quick Grade Entry – Enter Grades

Displays learners available for grade entry, based on the entered selection criteria. You may click on any column heading to specify sort order – for example you may wish to sort by unit code to enter all grades for one unit before moving onto the next.

Quick Grade	Quick Grade Entry										
Your selection crit	eria:										
Centre : Qualification : Reg Group Code :	952:Avriis centre 2UAIt:Two Units All				Site : Unit :	952.001:Avrils site All					
1. Enter results for	units already registe	red without	a grade								
Last Name	First Name	ULN	Learner Code	Qualification Code	UAN	Unit Code	Unit Title	Date	Grade		Alt. Achievement
Dell'Uomo	Ма		124036	2UAR		2Us	2UA	10/09/2018	Pers	•	0
Dell'Uomo	Mia		124036	2UAI:	89888	2UC	2UC	10/09/2018	Fass	*	
Save and Request	Certificates Save	Beck									

## 7-52 : Quick grade entry – Enter grades page via Grade Upload

Buttons available are

Button	Purpose
Save and Request Certificates	Save any changes and takes the user to the Request Certificate page, where the type of Certificate Request required can be selected.
Save	Save any changes.
Back	Returns to the Quick Grade Entry screen.

Field Name	Purpose	Validation
Date	Date of Grade entry.	Mandatory
Grade	Grade achieved. If the default grade was selected on the previous screen then if that grade exists for that unit then the grade will be displayed here.	Mandatory

As the Quick Grade Entry screen has been accessed via 'Grade Upload' (Learners main screen - See section 7.1), the user is able to enter results for units already registered that have a grade:-

## **Quick Grade Entry – Centres**

Centres are able to use the Quick Grade Entry screen – and this can be optionally sent into a holding area for verification by internal staff before achievement is entered into the system proper.

#### 7.9 Quick Grade Entry – Creating Import Flles

If the user has chosen the "Create Import from Quick Grade Entry", then it is possible to create a grade import file by using the Quick Grade Entry screens.

The process is the same as detailed in the above section (see 5.11), but with some additional steps:-

On this screen the user is able to enter results for optional/additional units that have not yet been registered. (See point 2 in 4-57 below).

## Quick Grade Entry – The "One Fell Swoop Function!"

There is a new Multiple Units button in the Quick Grade Entry process. This allows you to add multiple unit registrations for a learner by quickly ticking some boxes and entering the grades they achieved for those units – in one fell swoop.

For example this can be useful for a centre if they haven't previously specified which optional units a learner was planning to do, but they now wish to inform you of the optional units at the same time as entering the achievement.

Quick Grade	≅ Entry									
Your selection cri	teria:									
Centre : Qualification : Ibeg Group Code (	952:Avrils centre 204/cTwo Units All			Site	Site : 952.001-Avins site Unit: Al					
T. Enter results fo	in units already regist	ered without a ;	grade							
Show these units										
Last Name	First Name	UUN	Learner Code	Qualification Code	UAN	Unit Code	Unit Title	Date	Grade	Alt. Achievement
Dell'Ucmo	Mie		124036	2UAH		20+	204	10/09/2018	Pasa =	0
Dell'uomo	Mis		124036	2UAIt	89958	200	2UC	10/09/2018	Pass -	-
2. Enter results fo Enter the learner co Learner Code	er units not included a ode and unit details bei	above ow. then click the All Learners	+ Add button	Pathway	Owle	uit.		* Pathwa	g Group AB	+
4/nit		M (2Ua) DUA								* Select Multiple
Assessment Date		10/09/2018		Grade	Pass			- Addition	al Atemative Achieve	ement 🗊
Add										
Rows already add	sed									
No new registrati	ions added									
3. Enter details fo	r your Import									
Flename										
Default PO Number	4									
Save and Create	Import File Back									

### 7-537: Quick grade entry – Enter grades page via Grade Upload

Buttons available are

Button	Purpose
Add	Add the selected results for optional/additional units that have not yet been registered to the data which will be saved to the new Grade Import file.
Select Multiple	This allows you to add multiple unit registrations for a learner by quickly ticking some boxes and enter the grades they achieved for those units – in one fell swoop (See 7-547-1below)

Save and Create Import	File	Save the data shown/s which is created.	elected to the Import file
Back		Returns to the Quick G	arade Entry screen.
Field Name	Purpose		Validation
filename	Name of the Import	file to be created.	Mandatory

Clicking on the Multiple Units button displays the following (This can be displayed either in a popup window OR within quick grade entry screen.

Mul	ti <mark>ple L</mark>	lnit Sele	ction							
Save	& Clos	e Se	elect Mandatory	Reset to D	Defaults	Clear Selected	l Units			
Search			Code	•	Search					
Manda	tory (M	1)	Units (Min/M	ax):2 / 2		Credits (Min/N	(ax):3 / 3			
All	UN	Unit Code	Unit Title	Credit	Level	Mandatory	Assessmen <mark>t</mark> Date	Grade	Additional	Alt. Achievement
۰		2Ua	2UA	2	1	2	11/09/2018	Pass *		0
٥		2UB	2UB	1	1	2	11/09/2018	Pass 🔻		0
Option	al (01)		Units (Min/M	ax):1 / 1		Credits (Min/N	lax):1 / 11			
All	UN	Unit Code	Unit Title	Credit	Level	Mandatory	Assessment Date	Grade	Additional	Alt. Achievement
8	89888	2UC	2UC	1	1		11/09/2018	Pass *		0
٠		3180 CB	3180 - Credit Based	11	2		11/09/2018	Pass *		8

7-557-1: Quick grade entry – Select Multiple

#### Buttons available are

Button	Purpose
Save & Close	Saves the selected units and returns you to the previous screen (if window in pop up)
Select Mandatory	This automatically selects all of the mandatory units
Reset to Defaults	This resets the Grade, Assessment Date back to their default values
Clear Selected Units	This clears the selection of any selected units
Search	This highlights the appropriate row depending on the search criteria. You can search by Code, Name OR URN.

Alt. Achievement

Individual rows can now be flagged as an alternative achievement row.

Once you have selected multiple units and have saved your selection, then the wording 'Multiple Units' will be displayed in the drop down list for the unit(s).

2. Shar naw ta fan write not instudiest sooke Arlei tre tearwe see and wit segat beloe, tren tre te	iransi.								
Lawrent Donie	Arturente	*	Bathoay	beaut	-	Dational Bridge	Al	+	
Lint	Wundersteinen (							1.0	disestantin in
Assessment Date	11/09/2018		Dete	Pass	-	accounts.	II extensionered		
Add									

Then upon clicking the 'Add' button in the above screen, the selected units will appear under a 'rows already added' section, with the appropriate assessment date(s) and grade(s).

arrari	1a-	All Learners -			Pathway	Default		-	Pettway Group	All	*		
-=		Muttole Units										(#)	Select Multiple
mate	Date	17/16/2018			Units	Maria		*	Anthone	-23	Abernative Autoenament	83	
6.21	dradied												
63)	dy added First Name	Last hame	ULN	Learner Gode		un ur	t Coda Data		Grade	Additional	Alt. Achieve	mont	
6 a)	dy soled First Name Notice	Last Name Redet	ULN	Laarner Codo		UN UI 14	t Coda Data	atu	Grade Fast	Additionar Face	Alt. Achieves Fenn	mant	
ra di C	Rysoled First Name Magaret Regime:	Last Name Seiser Seden	ULN	Learner Code		UN Ur 10 20	t Cotts Data Hist	2514 2214	Grada Fast	Additionar Face False	Alt. Acribios Pana Tatas	mont	

Then you can save the data shown/selected to the Import file by clicking on the 'Save and Create Import File' button

Once the file is generated it will have errors because the additional alternative achievement information will not have been recorded. The user can use the 'Hide Valid' checkbox to easily show these rows and complete the missing information.

#### Quick Grade Entry - Adding specific individual unit(s) / grade(s)

This is almost identical to the above with the exception of using the 'multiple units' button. Here the user would pick a specific unit / learner code / grade / assessment date instead of using the 'multiple units' button.

Then upon clicking the 'Add' button in the above screen, the selected units will appear under a 'rows already added' section, with the appropriate assessment date(s) and grade(s).

#### 7.10 Registration Card Batches

Registration Cards give the Learner a record of information regarding their registration. This screen allows the user to manage the printing of Registration cards for Learners.

#### **Create Batch**

The Create Batch screen enables the user to search for Registration Cards based on Centre and Site.

Registrat	on Card Batches							
Selec Cener	•	· Constituent fact						
Wends Presed								
	Eatch Number	Site Name	Printed	Cardi	Created By	Ereated	Proted By	Printed On
0	131	Aristik	1.546	3	ø	11/05/2018		
0	-	2001g-3 180 018	No.	14	George .	10/12/2013		

Figure 7-56-2: Create Batch page



## Buttons available are

Button	Purpose	
Create Batch		Create a new batch of Registration Cards, based on the entered selection criteria.
Back		Return to the Learners search screen.

Field Name	Purpose	Validation
Centre	The centre name to search by	No Validation
Site	The site name to search by	No Validation
Hide Printed	Remove printed batches from search results	No Validation

Select Se

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#### View Registration Card Batch

The View Registration Card Batch screen enables the user to print or export a batch of Registration Cards and then mark them as printed.

View Registration Card Batch			
Back to Batch List			
14 4 1 of 2 ? 🌶 🌶 🗐	Find   Next	KML file with report data	
		CSV (comma delimited) PDF	
		MHTML (web archive) Excel	
		TIFF file Word	
Welcome to XYZ Awarding Organisat	ion		

XYZ is pleased to welcome you onto your course. We hope that you find your qualification relevant, interesting and, above all, enjoyable.

#### Lifetime Registration Card

As you are a first time candidate of XYZ, we have allocated a unique lifetime registration number to you. This is shown on the card below, which is yours to keep.

## Figure 7-57 : View Registration Card Batch page

#### Buttons available are

Button	Purpose		
Back to Batch List		Return to the Registration Card b	atch list.
Mark as Printed		Mark the batch of Registration ca	rds as printed.
Field Name	Purpose		Validation
-	Select th the regis	e format to use for the export of tration card batch details.	No Validation

#### 7.11 Event Registrations

### **Event Registration Details**

The detail for any Event the learner is registered on can be viewed on the Event Info tab for the learner.

arner First Name *	incy 🔮	Middle Names	9		town between a		P. M. Martin	
					Lags marrie -		Delioniego	
e No	c Supplied 🔹	Number 13	2037		UUKO +			
g * 22	06/1990	Ethnic Grigin No	t Supplied		Gender*		Female	
NO I		Nationality	TED KINGDOM		Prevent Learner De	ta being shared to third parties		
stalls Access Peristrations	Events Ounlibration Rat Even	strations Continues Loss	or Identifiare Licenser I	Mahar				



#### **Associated Event Info Details**

The detail for the associated Event can be viewed by clicking the  $\ref{eq:temperature}$  in the Events tab or by clicking the Event Info tab for the qualification registration it is associated with.

Edit Qualification Registration - Hacking the planet										
Save Save :	and Close Close	Transfer Registration Move I	Registration				4			
Qualification	Units PLR Event	Info Alternative Achievement	Entry Requirements	Qualification Prerequisites	Notes					
Event Number	143									
Status	Approved									
Centre	172:Centre 1b									
Site	172.002:Site B									
Qualification	h4x:Hacking the plan	et								
Start Date	26/09/2018									
End Date	27/03/2019									
Facilitator	Number	Facilitator Status	Renewa	al Date Title	First Na	me Last Na	ime Is Lead			
20		Current		Mr	Dar	Kim	Yes			

### Figure 7-61 : Event information tab

## Gordon Associates

#### 7.12 Pending Alternative Achievement

This shows a list of pending alternative achievements with two dropdowns for filtering the list by site and/or qualification. Pending alternative achievements are those that have not be flagged as Approved or Rejected.

The list of alternative achievements to show will differ depending on the role of the logged in user. The below table shows how this should work :

Role	Filter
Centres	Only show alternative achievements for registrations at the users centre. If the user has associated sites setup, then only registrations will be shown at these sites. The centre user will not have the buttons to select or delete the pending alternative achievement.
EV	Only show registrations for qualifications recorded for the user defined as an external verifier for the qualification and site. The EV user will not have the buttons to delete the alternative achievement.
Any other	All other types of user will see all outstanding alternative achievements.

<i>///</i> ^	le.	Workflows	Centres	Venues	Learners	Qualification +	Certificates	Reporting	Contects	GA Admin	Admin	Events -		
Pendin	g Al	ternative Achie	evements	i .										
Approve	Selecto	ed .												
Site		AT						٠						
Quelificatio		All												
		Learner Numbe	r Le	arner		Site Name		Qual Cod	le	Unit Title			Туре	Created
O #	12	121181	Kai	th Frank		Matt Exam Site		simple		Performance Te	t single		Unplanned Exemption	25/11/2013 14:35:36
0 #	10	121181	Ke	th Frank		Matt Exam Site		simple		Performance Te	st Vinit 3		Unplanned Exemption	25/11/2013 14:45:30

#### Buttons available are

Button	Purpose
Approve Selected	This approves the selected alternative achievement. (Hidden for centre users)
0	Clicking this allows you edit the alternative achievement
×	Clicking this allows you to remove the alternative achievement.

If the achievement is updated to approved then an email will be sent to the email address configured under the setting AlternativeAchievement.EmailParnassusOperator. Parnassus will not email the centre directly it is up to the AO to inform the centre of their decision.

## 8. Qualification Maintenance

To maintain qualifications, click on the Qualifications option of the main menu down the left side of the page. Parnassus can cater for National Qualifications Framework (NQF) qualifications, Qualifications and Credit Framework (QCF) qualifications, Regulated Qualifications Framework (RQF), QAA and a combination of NQF and credit based qualifications and also non-accredited qualifications.

For additional guidance on setting up qualifications you can view our video:

Quick guide to setting up a qualification

## 8.1 Overview of Qualifications in Parnassus

Parnassus Qualifications consist of combinations of unit groups and pathways. The unit groups specify the units which are available within a Qualification, whilst the pathways and the rules of combination detail how a learner can follow a default or specialised course of study. The Rules of combination consist of specifying the min and max units and credits (if Credit Based is ticked) which are required. These settings are then combined with the mandatory/optional settings for each unit and the advanced settings which specify any mandatory combinations of units. All of this functionality is accessed from the Edit Qualification screen.

Qualif	cation													
Seco	Save and Cloce	Line	canal. View	Status ( Centry									Lost Structural Change: 26/	/04/2021 14:41 🤹
5.ettes	Approved	2	Tida •	ar#iiar										
lere	2509425021		Tode !	tingant	Replaced By									
			Standalanc 🔒	Create Canada C	Review Date									
Regulation	tes have already b its always use the any Registration is ulatory	een tisued i latest qualit Actievement	or this qualific leation structu   Grading   Int	ation. If you change the re, this could result in o opration   Units   RoC	Fornet grade Flevent grade Groups   Prerei	ides WILL be re calculated i is on the reprint and origina ausites [ Entry Requirements	or complete l certificater l Qualificatio	registrations: Th . You should cre n Sets   Custom	is could result in the g ate a new qualification Notes   Documents	pade shown against rradier than changh	a learner's registrau gia qualification wh	ene certificates have b	(d) ferent to the grade v Aen issued.	on the certificati
Dunit	e Rody O					mary Regulator Qual Number 🔒								
Primar	y Framaetork	NQF			• •	p=0	NO5		-					
Level		Nona		• esre 0	50	baector								
Repla	tory Type	Nuc Sec			21	many Regulator Stars Dava 😁								
latel (	Jual Reason Cime		- D	ulted Learning Linux	ŭ	clude from Teammory Departs								
Hictory		horsec												
50567	nbow(c)	bin Sun Parpa	the thund to the	re erred Purpose										
Oth	er Regulator Ir	nformatio	on											
The of	formation entered on And Kegiteme	dina page na fo	i information and	e Regulatory reports and he	intererk specific	reles esc d'ernen Regelster O.	al Nemioer' an	d 'Francowsk' fields	alansa.					

Figure 8-1 : Edit Qualification

Unit groups are set up on the Units tab. It is suggested that unit groups are set up so that units with similar characteristics are put in the same group. Groups are flexible enough to set up in any number of ways. In the following example they have been set up with similar subjects in each group, they could just as easily have been set up to differentiate between mandatory and optional units.

palification								
an Second Cone	Date Charlenge	Vive Same Hitting						
attrated file -		TT Tori Ove 1						
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and delare ( Manufather								
feedatory (Mandator	n0			CK				Analysis working some States to
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						(AT)		
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0 #	ML Leve 2	-10 1		6100 A		94.1	nas. Nas	
0 X 0 X nut 2 (Emp 7)	ML10473	10 2	хD	nana. 4		94.1	me 1. 	Audio success and see u
OH OH mup 2 (Group 2) UN	Unit Code	s Credit	хÞ	nos. i Lovel		943 953 Uni	nes. Nes	Analys nothing turk
ON N North 2 (Group 2) UN ON	Unit Code Milert 2	in 5 Credit 4	¢ x	noss i Level 4		eks eks Uni	nes. Nes Titus Ness	analys satility (1997) All Sec. (1
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Figure 8-2 : Unit Group Setup

Each unit group will also have its own rules which the learner must satisfy. The pathway 1(see Figure 8-3 : Second Pathway) requires a minimum of 3 units and a maximum of 3 units.



Figure 8-3 : Second Pathway

Each unit pathway will have its own rules, which the learner must satisfy to achieve the qualification. In the default pathway (see Figure 8-4 : First / Default Pathway below), the learner is required to achieve a minimum of 2 units and a maximum of 2 units. In a Credit Based qualification there would also be a minimum and maximum credit requirement. In the default pathway, these requirements are spread across units in the second group. A minimum of 1 unit and a maximum of 1 unit have to be achieved from each group, with the unit in the first group being mandatory in both pathways while a different unit is required as mandatory from the second group of units for pathway 1 or pathway 2.

Qualification						
Save love and Close. Chile	Check Roc View Status Haboy					4
Qualification Table	Tana k 1/m					
the Borne Date 1	India pathwig	Fremwork	34.P	t level	1	•
Regulation Clubs Normann 🔒		Chiefe Break		lister	70107	
anas generation e		internation of the	12	Quatras	11 Spiring -	H1
Tere	484 *					
a (n)					Harmon Long Results [1]	Hearter Lints Hearter 20
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li un u	Init Code Unit Title					Mandetory
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97 (91)					Nopotean units Required	Havehart shits Awyarits [1]
a un u	init Code Unit Title					Mandatory
0.0	anayana ayanayana					-m -
0 × v	ALIGUE WITHOUT					.w

Figure 8-4 : First / Default Pathway

The advanced settings popup allows specific combinations of units to be applied to the Qualification. For example, where unit VU001 is selected, unit VU002 must also be selected. This screen is also used to define barred unit combinations by selecting 'disallow'.



Add New			
No Data To Di	splay		
If select unit	R/103/4194 (g1)		
Then	must select		
Unit	Y/103/4195 (g1)	-	

Figure 8-5 : Advanced Settings

Alternate pathways are now available for selection at learner qualification registration.

entre	954:avril centre	τ.
Site	954.001:avril site	•
Qualification	BS:Building Sheds	
Pathway	Pathway 2	•
Registration Date	17/09/2018	

Figure 8-6 : Qualification Registration Pathway selection

More detailed descriptions of the Qualification maintenance screens can be found in the following sections.

## 8.2 Qualifications Listing Page

When you have clicked on the Qualifications option on the main menu you will be presented with the following page.

Qua	alific	ations	5									
Add	New	Copy	Gualification	2								
				Search	Code			Owr	Sweth 00 Origin	the with Notes		
		QN	Code	Title		Credit	Level	Status	Standalone	Regulatory Type	Registration End	No. of Notes
0	*		PTAAR	Permanual Testing - Assessment - Alternative Achievement		5	Note	Approved		Regulated		0
0	24		PTAAAPL	Perhassus Testing - Assessment - Alternative Achievement - Plor Learning		1	None	Approved		Regulated		0
0	#		PTAE	Partiassus Testing - Assessment - Elements		2	None	Approved		Regulated		5
0	22		PTEGIDIM	Remassus Tessing - Batch Grade Import - Direct Import Mode			None	Approved		Regulated		2
0			PTBOH	Pernastus Testing - Batch Grade Import -Custom Headings			None	Pending		Regulated		0
0	22		PTBRCH	Permanaus Terring - Betch Registrations - Gustom Headings			Mone	Pending		Regulated		0
0	2		PTERDIM	Parmassus Tearing - Batch Registrations - Direct Import Mode			Abre	Pending		Regulated		0
0	*		PTERDIMEN	Parmassus Testing - Batch Registrations - Direct Import Mode - Existing			None	Panding		Regulated		5
0	×		PTCUAQ1	Parnagous Testing - Centre Users - Access - 01			None	Approved		Regulated		0
0	32		PTCUA02	Perhassus Testing - Centre Ubers - Access - 02			None	Pending		Fegivioted		D
0			PTCC0Q1	Pernassus Testing-Centification - Centificate Dates - Quel 1			None	Approved		Regulated		0
0	×		PTCCDQ2	Pernassus Testing - Certification - Certificate Dates - Qual 2			None	Approved		Regulated		0
0	н		9700	Parmassus Testing - Certification - Certifying unit without selecting a qualification			14ona	Approved		Regulated		0
0	34		PTLRA	Parmassus Testing - Learnars - Reasonable Adjustments			None	Panding		Regulated		.0
0	*		PTLSP	Permassus Testing - Learners - Store photo and signature image to learner record			None	Pending		Regulated		0
				1	1 2 3 4 5 5	784	E (10)					

#### Figure 8-7 : Qualifications listing page

From here you may carry out the following:-

- Add New Qualification
- Delete a Qualification
- Select Qualifications for Editing
- <u>Copy a Qualification</u>

#### **Qualification Search**

The Qualification Search options available to search by are:

- Code
- Name
- Regulator Qualification Number
- Regulatory Type
- Level
- Registration End
- Status

The order in which the Search options are displayed is configurable.

Buttons available are

Button	Purpose
Search	Click on 'Search' to list all Qualifications from the criteria selected above.

The Qualification Search allows the use of wildcards to increase the flexibility of searches.

#### 8.3 Add a New Qualification

#### **Qualification Details**

Clicking on the 'Add New' button will take you to the Qualification creation page as shown below. The details of the qualification are arranged into themed sections using tabs. Once you have saved the initial details more tab sections will become available to use.

Qualification							
Save Swe and Liote	1 See						
Statua Pending	D Tes-						
Date	Code * Replac	ad By					
	Standalone 😗 🗋 Credit Based 🗍 Review	Date					
Regulatory Registration	Achievement   Integration   Entry Requirements   Qualification	Sets Custom Kotes Documents					
Regulatory							
Owning Body ()		Primary Regulator Qual Number 😝					
Primary Framasion's	NQF T	Type 🖯					
Level	None - SQFe 🗆	Subsector					
Regulatory Туре	Nor Sec. •	Primary Regulars - Start Date 0					
Total Qualification Time	Guided Learning Hours	Exclude from Statutory Reports					
Purpose	Nuc Se:		•				
Sub Parposob)	No Sab Paracetes Tourid for the selected Paravise						
Other Regulator	Information						
The information entered on	this pape is for information only. Regulatory reports and framework s	sentin nilet ute the main Reg Jator Qual Kumper' a	d Tramework fields above. In	under the edid information for	rcher regulators you must fi	er save the qualification	

## Figure 8-8 : Qualification main details

Field Name	Purpose	Validation
Status	The status of the qualification	Mandatory: must be one of the selectable values
Date	The date the qualification was approved	Mandatory: must be a valid date value
Qualification Title	The qualification title	Mandatory, must be entered.
Qualification Code	The code for the qualification	Mandatory, must be entered
Replaced by	The details of any other qualification that has replaced the qualification	Optional
Standalone	Limits the learner to registering for a single unit on this qualification	Optional
Credit Based	Whether or not the qualification counts credit	Optional
Review Date	Date for qualification review – for information only	Optional

N.B. Registrations entered in the Learners screen will be validated against these fields. e.g. the registration date must be between Our Registration Start and End.

## **Regulatory Information tab**

Owning Body 🚯					Primary Rej	gulator Qual Number \vartheta	500/6804/0				
Primary Framework	NQF			٣	Type 😝		Vocationally-Re	lated Qualif	ication	*	
Level	1	* EC	(F <b>O</b>		Subsector		0:None				*
Regulatory Type	Regulated *	]			Primary Rej	gulator Start Date 🚷					
fotal Qualification Tin	ne	Guided Lear	rning Hours		Exclude fro	m Statutory Reports					
ourpose	Not Set						•				
iub-Purpose(s)	No Sub Purposes fo	und for the selected	Purpose								
Other Regulat	tor Information										
The information enter	ed on this page is for infor	nation only. Regulate	ory reports and f	framework	specific rules us	e the main 'Regulator Qu	al Number' and 'Fra	nework' fiel	ds above.		

Field Name	Purpose	Validation
Owning body	The organisation recognised by Ofqual to award the accredited qualification.	Optional
Primary Regulator Qualification number	The Qualification Accreditation number for this qualification	Must pass the QN reference number checksum validation. Required and validated for QCF and RQF Framework qualifications.
Primary Framework	The primary framework the qualification belongs to	Mandatory
Туре	The type of the qualification	Mandatory: must be one of the selectable values
Level	The level of the qualification	Mandatory: must be one of the selectable values
Subsector	The subsector the qualification is part of	Optional
Regulator Type	The regulator type eg regulated or non- regulated	Optional
Primary Regulator Start Date	The date the regulations started	Optional
Total Qualification Time	Total hours for qualification	Optional
Guided Learning Hours	Guided learning hours for qualification	Optional
Exclude from Statutory Reports	If selected, data will not be included in Statutory Reports	Optional
Purpose	A description of the purpose of the qualification	Optional
Sub Purpose(s)	A description of sub purposes for the qualification	Optional

# Gordon Associates

## **Registration Details tab**

Regulatory Registration Achievement Grading Integration Units RoC Groups Prerequisites Entry Requirements Qualification Sets Custom Notes (5) Document

Registration				
Photo Mandatory for Registration	Signature Mandatory for Registration	Requires ULN ()	Learners require NI Number [	0
Auto register pre-registered Units 📵	'Use Best' selected by default 🔒	Allow selection of 'Use Best' 🚯		
Min. Registration Age	Lifetime (months)	Lifetime reg		
Registration Start	Registration End	Our Registration End		

Field Name	Purpose	Validation
Photo Mandatory for Registration	If selected a photo file is required on registration for this qualification	Optional unless set as Mandatory
Signature Mandatory for Registration	If selected a signature file is required on registration for this qualification	Optional unless set as Mandatory
Requires ULN	If selected the leaner ULN must be supplied	Optional
Learners Require NI Number	If selected at registration the NI Number must be supplied or a reason for it not being available must be given	Optional
Auto register pre- registered units	Whether optional units should be automatically selected/registered if the learner has registered for these units on a prior qualification	Optional
Allow selection of 'Use Best'	If selected allow 'Use Best' to be set on the learner unit registrations for the qualification (this can be turned on off for all qualifications please contact Gordon Associates to discuss)	Optional
'Use Best' selected by default	If selected 'Use Best' will be checked on learner unit registrations for the qualification (this can be turned on off for all qualifications please contact Gordon Associates to discuss)	Optional
Min Registration Age	The minimum age a learner can be to be registered for this award	Optional: must be a valid number > 0 if specified
Lifetime (months)	The length of time (in months) that a registration can remain "In Progress" for this qualification	Optional: must be a valid number greater than zero
Lifetime reg	If selected learner has lifetime registration for the qualification	Optional
Registration Start Date	The date that registrations for the qualification can start	Optional: must be a valid date if specified
Registration End Date	The date registrations for the qualification can end	Optional: must be a valid date and > Registration Start if specified

# Gordon Associates

## Achievement Details tab

This tab has two sections Achievement and Certification.

Achievement									
Min. Assessment Age		Learner: EA R	atio		Learner: l	A Ratio 🚯		Must pass all units	C
Max. Number Of Exemption	ns 🔁	Automatically	Request F	full Certificate	on Cert Due	e 🗹			
Certification									
Exclude from Certificates				Allow eCerti	ification				
Certificate Title									
Certification Start				Certificate E	Expires (month	ns)			
Certification End				Our Certifica	ation End				
Min. Certification Age	0			Earliest Cert	tification Perio	od (days)			
Qualification Template	Full Cert Bate	h With QR code	٣	Unit Templa	ate		StandaloneUnit	:CertificateBatch	*
Partial Template	PartialCertifi	ateBatch	*	Transcript T	emplate		TranscriptBatch	ŝ	*

## Achievement

Field Name	Purpose	Validation
Min Assessment Age	The minimum age a learner can be to be assessed for this award	Optional: must be a valid number > 0 if specified
Learner: EA Ratio	Allows you to specify the ratio of learners to an External Assessor on courses/assessments for this qualification. Currently this field is provided for information, i.e. no checks are made against the values on other screens in Parnassus. However in future versions we may introduce checks on the Events, Registrations screens etc.	Optional
Learner: IA Ratio	Allows you to specify the ratio of learners to an Internal Assessor on courses/assessments for this qualification. Currently this field is provided for information, i.e. no checks are made against the values on other screens in Parnassus. However in future versions we may introduce checks on the Events, Registrations screens etc.	Optional
Must pass all units	If selected the learner must pass all the units on the pathway that they have registered on where Include on Award is ticked for the unit	Optional
Maximum Number of Exemptions	Can be used to set a limit to how many exemptions a learner is allowed for this qualification	Optional

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Request Fullautomatically have the 'Request FullCertificate on CertCertificate' flag set to true when the registration becomes 'Cert Due'.	nal
---	-----

## Certification

Field Name	Purpose	Validation
Exclude from Certificates	If selected this qualification will not be able to have certificates issued	Optional
Allow eCertification	If selected this allows eCertificates to be used (this can be turned on off for all qualifications - please contact Gordon Associates to discuss)	Optional
Certificate Title	Title for use on certificates, if different from the Qualification Title	Optional
Certification Start	The date when certificates can start being produced from	Optional: must be a valid date if specified
Certificate Expires (months)	Number of months past assessment date a qualification certificate is valid for	Optional: must be a valid number > 0 if specified
Certification End	The date certificates can be produced up to	Optional: must be a valid date if specified and > Certification Start
Our Certification End	Your end date for certification on this qualification if different to the official date	Optional: must be a valid date value between the Certification Start and End dates if specified
Min Certification Age	The minimum age a learner can be to be certified for this qualification	Optional: must be a valid number > 0 if specified
Earliest Certification Period (days)	Can be used to set a minimum number of days between registration and certification	Optional: must be a valid number > 0 if specified
Qualification Template	The template to use when generating qualification certificates for this qualification	Mandatory: must be one of the selectable values
Unit Template	The template to use when generating unit certificates for this qualification	Mandatory: must be one of the selectable values
Partial Template	The template to use when generating partial certificates for this qualification	Mandatory: must be one of the selectable values
Transcript Template	The template to use when generating transcripts for this qualification	Mandatory: must be one of the selectable values

## Integration Details tab

Regulatory	Registration	Achievement	Integration	Entry Requirements	Qualification Sets	Custom	Notes	Documents	
Integra	ation								
Exclude fro	om PLR	0							
UCAS Poin	ts Compatible		UCAS Point	s Tariff					
Financ	e								
Chargeable	•0		Product Co	de (GP)					
Fee % at R	egistration		Fee % at Ce	rtification					

Field Name	Purpose	Validation
Exclude from PLR	If selected, achievements will not be uploaded to the PLR	Optional
UCAS Points Compatible	Denotes whether the qualification qualifies for the UCAS Points	Optional
UCAS Points Tariff	Number of UCAS Points	Optional
Chargeable	If selected, this can be used to indicate that registrations are chargeable.	Optional
Product Code (GP)	The registration product code for the qualification, used for export to a Third Party Accounting system	Optional
Fee % at Registration	If this value is added, the 'Fee % at Certification' will also need to added, and the total of the two must add up to 100. This can be used by the Hermes finance module to calculate fees.	Optional
Fee % at Certification	If this value is added, the 'Fee % at Registration' will also need to added, and the total of the two must add up to 100. This can be used by the Hermes finance module to calculate fees.	Optional

## **Qualification Sets tab**

Regulatory	Registration	Achievement	Grading	Integration	Units	RoC G	Broups F	Prerequisites	Entry Requirements	Qualification Sets	Custom	Notes (1)	Documents	
Qualific	cation Set	s												
Co	ode		Title						Created					Last Modified By
O QS	01		Qual	Set 01					08/11/2019 15:48:43					RachelAOAdmin

A list of any qualification sets that the qualification is part of.

#### **Custom tab**

Regulatory Registration Achievement Grading Integration Units RoC Groups Prerequisites Entry Requirements Qualification Sets Custom Notes (1

Any custom data for the qualification is shown here. Please contact Gordon Associates if you need information on this tab.

#### Notes tab

ulatory	Registration	Achievement	Grading	Integration	Units	RoC	Groups	Prerequisites	Entry Requirements	Qualification Sets	Custom	Notes (1)
otes												
Attach	a File	e file No file chi	osen	Priority []	Save	e Note						
					-							
	Note											
	RachelAOAd	min confirmed t	he increas	ing of our end	dates p	ast tha	at of their	associated				
	regulatory e	no dates,										

You can save notes and attachments concerning the qualification here.

### **Credit Based**

Selecting the Credit Based option will change to the Qualification creation page as shown below.

Every unit and qualification in the framework will have a credit value (one credit represents 10 hours, showing how much time it takes to complete) and a level between "Entry-Level" and "Level 8" (indicating how difficult it is).

Regulatory Credit Based	Registration	Achievement	Grading	Integration	Units	RoC	Groups	Prerequisites	Entry Requirements	Qualification Sets
Credit Based										
Credit Value 🚯 +	, E	At	the Level o	f the Qualificati	on or abi	ove				
Credits from Mandatory U	Inits	Cn	edits from (	Optional Units				Credits	from Equivalent Units	

### Figure 8-9 : Credit Based Qualification details page

Field Name	Purpose	Validation	Use	
Credit Value	Specify the total credit value that has to be accumulated for the qualification.	Mandatory.	Used to calculate when Learner has	
	Awards (1 to 12 credits)		"Achieved" the qualification. The	
	Certificates (13 to 36 credits)		total of their Unit Credit Values must	
	• Diplomas (37 credits or more).		equal this Value.	

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	This should be set to the minimum credit value which satisfies the pathways set up for the qualification. Used to determine the Qualification Registration Status.		
Credits from Mandatory Units	Specify the total credit value that can be accumulated from mandatory units.	None	Information Only
Credits from Optional Units	Specify the total credit value that can be accumulated from optional units.	None	Information Only
Credit at the Level of the Qualification or Above	Specify the total credit value that needs to be accumulated from units of the same level (or above) as the qualification.	None	Checked when calculating "Achievement" of Qualification.
Credits from Equivalent Units	Specify the total credit value that can be accumulated from other units where they have been identified as being of equivalent units.	None	Information Only

## Buttons available on this page

Button	Purpose
Save	Save the record with the data entered and remain on this page to continue editing the record. The tabs for Units, Rules of Combination, Grading and Notes will not become available until after a new Qualification has been saved.
Save and Close	Save the record and return to the Qualifications Listing page as shown in section 8.2.
Close	Return to the Qualifications Listing page as shown in section 8.2 without saving any changes made.
Check RoC	Check the Qualification satisfies the standard rules of combination.

## **Entry Requirements**

Entry requirements can be specified for qualifications. These entry requirements do not have to be qualifications e.g. DBS Checks. To enable this feature, you will need to supply Gordon Associates with the entry requirements you wish to use and also what entry requirement status' you want e.g. 'Achieved'.
Regulatory
 Credit Based
 Registration
 Achievement
 Grading
 Integration
 Units
 RoC
 Groups
 Prerequisites
 Entry Requirements
 Qualif

 Entry Requirements
 Overseas E-Membership Membership
 Junior Membership
 First Aid
 Safeguarding
 Gold Membership
 Des

 DBS
 DBS
 Des
 Des
 Des
 Des
 Des

When adding learners via the registration import a warning will be displayed that the qualification has entry requirements specified.

Field Name	Error Message	Severity
Qualification	Qualification has entry requirements	Warning

You will also need to agree on what level of checking you want for the entry requirements as below. This feature can be turned on/off using a configuration setting by Gordon Associates:

#### Severity of 0

Certification routine will not be affected

#### Severity of 1

Prevent certificates from being created for any registration that has not met any of their Entry Requirements and display the following message:

Entry Requirement #Name# has not been met or has expired.

### Severity of 2

Allow certificates to be created for any registration that has not met any of their Entry Requirements and display the following message:

Warning: Entry Requirement #Name# has not been met or has expired.

To show a learner has fulfilled the entry requirement you can select the status for the learner registration in the edit qualification registration screen as shown below.

we Save and Close	Close Transfer Re	gistration Mo	ve Registration			)
elification Units P	LR Event Info Alterna	tive Achievemer	t Entry Requirements	Qualification Prerequisites	Notes	
Requirement	Status	User	Date Set	Expiry Date	Notes	
First Aid	Achieved	n ga	17/09/2018 15:28	21/09/2019		
	Achieved					

### **Our Registration End/Our Certification End**

If you are using these fields please be aware that all the qualification registrations may be affected. If you change these dates then you will have to confirm or decline the message below and if you confirm a note will be added to the qualification record to show this.





### **Prerequisites Tab**

If you are using prerequisites for a qualification then you can now have them set to work at the registration, achievement or certification stage as below.

Regulatory | Registration | Advectment | Grading | Integration | Units | RoC | Groups | Prerequisition | Entry Regulatory | Qualification Sets | Custom | Notes | Decoments

rereq				
Certifica	ation (0) Registration (12	Assessment (0)		
Prerieq ALL-GR	ulute Qualification Groups IOUP 1 (EROUP1) 🙀 🕽			Ante Provinsione Qualification Group
	Regulator Number	Code	Title	
н	505/6804/0	AUTOTESTQUAL	Tearing Qualification 1 (NQF-(1) performed, 2 groups, PercePart - Generated by 'acut county sortion)	
	and seal is			



#### 8.4 Deleting a Qualification

To delete a centre go to the Qualifications Listing page as shown in section 8.2 and locate the qualification you wish to delete.

Once you have identified the correct qualification, click on the <sup>\$\$</sup> icon, you will then be prompted as to whether you really wish to delete this record as shown below.

parnassus	viii.90 says			
Are you sur	e you want to	delete this item?		
			ОК	Cance

Figure 8-10 : Confirmation of deleting a qualification

Click 'OK' to delete the record else click 'Cancel' to stop the deletion.

In order to delete a qualification, it must NOT ...

- have learners registered against it
- have any units (these must be deleted separately)

### 8.5 Editing a Qualification

To edit go to the Qualifications Listing page as shown in section 8.2 and locate the qualification you wish to modify. Click on the  $\bigcirc$  icon to select the record.

You may now edit the record's primary details as described in section 8.3 and also manage <u>units</u>, <u>Rules of combination</u>, <u>grading and notes</u>.

You can view the date of the last structural change made to a qualification in the date text next to the audit icon on the top right of the page.

Qualification							
Save Save and Oose Oos	e Creck RoC Vew Status History					Last Structural Change	23/09/2019 16:26 🧏
Qualification Title *	Testing Qualification 1 : NQF - (1 per	hway, 2 groups, Pass/Fail - Generated by auto testing s	scripes)				
Cartificata Title							
Quelfication Code *	AUTOTESTQUALI	Fremenork	-NCJF	*	Level	(i)	
Regulacor Qual Nomber 🔒	500/6864/0	Credit Based	0		Status	Approved	Þ
Second QN for Certificate ()		Standalona ()			QuelFicetion Approval *	01/10/2011	

#### 8.6 Copy a Qualification

A complete qualification record can be copied easily. You can do this by clicking on the 'Copy Qualification' button. A new qualification is created with the same units, RoC, entry requirements and all of the other data that goes with it.

#### 8.7 Managing Units

To manage the units of a qualification, select the qualification you wish to edit as described in section 8.5. When you have selected the required qualification click on the 'Units' tab on the qualification page, you will then be presented with a screen similar to the one below.

Qualification						
Save and Clase Cuse Clieck Rot. Vie	en Stanus Hinney					4
Qualification Title *	Footboll Coeching					
quantication cade +	FARC	Trimesorx	NQE	*	Savolat.	Hane *
Regulator Qual Number 👦		Crasht Gaussi	8		Status	Approved
Second QV for Gentificere ()		Standalore 👩	0		Gueificetton Approvel *	17/09/2018
Туре	fans					
Omatic (Unite) asc.). Consing. (Corp.). Processed	Enry Requirements   Notes					



### **Unit Groups**

Before any units can be created or assigned to a qualification a Unit Group will need to be created, to create a unit group click on the Units tab on the qualification page, then click on the 'Add New Group' button. An in-page popup will then be displayed as shown below.

Add Unit Group			
Unit Group Name *	1		
Jnit Group Code *			
	Save	Cancel	

### Figure 8-12 : In-page popup for adding and editing unit groups

Field Name	Purpose	Validation
Unit Group Name	The name of the unit group	Mandatory
Unit Group Code	Used to distinguish between unit groups on Import. Allows the same unit to be in different groups. See Qualification Group Code in section 0 and Qualification Group Code in section 0.	Mandatory

#### Buttons available are

Button	Purpose
Save	Save the unit group
Cancel	Cancel adding a new unit group to this qualification

Once the group has been added it will become visible in the Units tab as shown below.



allication Tille *		Football Cheming						
effication Code +		FARC		Year Vehicle IX	NQF	*	1.404	Note *
urator Qual Number 😝				Credit Based	177		Tanat	Approved
ana gin for contricute 👦				Surazona	10		Qualification Approval. 1	17-09-2018
-0		hva:						
tera Unita   EaC   Grading   Gra	up 7 Frecequied	es   Entry Requirement	tta lattas					
atalia   Unita   SpC   Grading   Gro Add Unit Group	un Frecequiat	es   Entry Requirement	tta lattas					

## Figure 8-13 : Units tab on qualifications page with groups added showing available options

From here you can

Delete the unit group by clicking on the 🗱 icon, and confirming you wish to delete it. In order to delete a unit group it cannot have any units within it.

Edit the unit group name by clicking on the  $\boxed{2}$  icon, this will show the in-page popup as described earlier to allow you to alter the unit group name.

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### Assigning existing units

To assign an existing unit to the qualification click on the 'Assign Existing Unit' within the unit group you wish to place the unit in, an in-page popup will be displayed as shown below.

Shown	ng All Units *		
Search	· [	Unit Code * Search	
Θ.	CEPCID	Class Examination Primary : Classical Indian Dance	
8	CertGenU1	CertGenU1	
8	CETAPPP	Class Examination Pre-Primary	
8	CG CEP	Class Examination Primary : Classical Greek Dance	
11	CG G1	Grade 1 : Oassical Greek	
Θ.	CG G2	Grade 2 : Classical Greek	
8	CG G2	Grade 2 : Classical Greek	
0	CG G2	Gold : Classical Greek	
		Arrists Salasted Unitfol to Group	close

Figure 8-14 : In-page popup for allocating existing units

Select the units you require by checking the checkbox on the left hand side of the units grid. Once you have selected all the units you wish to assign to the unit group click on the 'Assign Selected Unit(s) to Groups' button. Click close to exit the popup at any time.

### Adding a New Unit

To add a new unit to the qualification, click on the 'Add New Unit' within the unit group you wish to place the unit in, an in-page popup will be displayed. See Section 9.2.

In the event that a unit exists with the entered unit code you will receive an additional option in the buttons

Assign Existing Unit

Use the unit found in the database that corresponds to this unit code



### **Editing a Unit**

To view a unit click on the <sup>o</sup> icon against the unit you wish to see, this will display an inpage popup as shown below, on which you can view the details.

St - 1	Ache	1.8	Unit Name *	Test Unit 1					
sble From			Unit Cade *	AutoTestUnis001	Replace	d By			
n Date		0		Cradit B	acad 🔲				
latory 1	Registration	Achievement   G	rading Integr	stion   Dependent	Items Element	Equivalent Units	Plenned Exemption	s Prerequisites Outco	mes   Custom   Note
1976									
egulati	ary								
ning Body					Ra	ulator Unit Number	A/502/3800		
•		None	*		Sul	sector	1,1:Medicine and	i Dentistry	*
: Assessm	ent Method	None Set							
yaratory Ty	pe	Not Set	•						
	ie .	-	Guided Lea	ening Hours 10					
to must have									

Figure 8-15 : In-page popup for viewing a unit

**Note:** all information is read-only in this popup. To modify the primary details for a unit, you must go to the units module.



#### 8.8 Managing Rules of Combination

To manage the pathways of a qualification select the qualification you wish to edit as described in section 8.5. When you have selected the required qualification click on the 'RoC' (Rules of Combination) tab on the qualification page, you will then be presented with a screen similar to the one below

athway Units							
chway	Defeuit		* Drat Anti-	hung Americad			
hway Code	Default		Clony st	ow selected groups and	units.		
i mum Units Required	Naconym	n Units Required					
imum Cladit.	Maximum	r Credit					
Nexement Month Limits							
ridatory (M)							Minimum Units Required Maximum Units Required
							Minimum Gredit Massimum Gredit
CI UN	Unit Code	Levei	Assessment Type	Weight	Resits	Unit Title	Mandato
A/502/9800	AutoTextUm2001	None				Test Urit 1	
tional (O)							Minimum Units Required Maximum Units Required
							Minimum Credit Maximum Drast
🗆 UN	Unit Code	Level	Assessment Type	Weight	Resits	Unit Title	Mandisto
	and the second second	Aleren V				Torollogia 2	

Figure 8-16 : RoC tab on qualification details page

### **Adding a Pathway**

To add a new pathway to the qualification click on the 'Add Pathway' on the pathways tab. This will display an in-page popup as shown below.

	1		
athmay Name	1		
	1		
anney runn	1	 100	

### Figure 8-17 : In-page popup for adding and editing a pathway

Field Name	Purpose	Validation
Pathway Name	The name of the pathway	Mandatory
Pathway Code	Used to distinguish between pathways on Registration Import	Mandatory

### Buttons available are

Button	Purpose
Save	Save the pathway
Cancel	Cancel adding a new pathway to this qualification

Once the pathway has been added it will be available for selection in the Pathway selection list located in the top left hand corner of the tab.

Pathway	Default	20	
Pathway Code	Pelautt Fathway th		
Minimum Units Required			
Minimum Cristili	20	Maximum Cristelii	
Acco		inton	
	Pathway Pathway Code Minimum Units Required Minimum Cristit	Pathway Pathway Code Minimum Cristin Minimum Cristin	Pathway Default Pathway Code Mmmum Units Required Mmmum Cristit

## Figure 8-18 : Dropdown list on RoC tab for selecting the pathway to edit

### **Editing a Pathway**

Once a pathway has been selected it can be edited. To change the name of a pathway, select the required pathway from the dropdown list and click the pathway from the in-page popup as described in section 0 where you can change the pathway's name.

To alter the units available for the pathway select the required units in the grids on the RoC tab as shown below

Thurse .	Failment B.	* 12 m	And Publicary Amazonan,		
ilunin Cards			The state and an an an and the state		
		water and the second			
mani bindti		wh Emili			
	Company of Company				
mintery (1911)					Π.
					The start is a second in the second birth in a second
					Rentrate (north Massingle's (1470)
10.000	Livit Crest	Dest	tawn	Deit This	Percetory
	mater			ad to	
	INCT OF			Bert G	
menal ( 1993)					Things are lineed
					Brown and Joseph County
THE MALL	1000 Colo	0.90	Look	1010 7010	Paraphree
	martin			and the second se	Contraction of the second s
	- A Contract			milia.	
					second
ana) 2 (20)					Testary and heard
					Personal County of a local
					Mandatan
10.00		10-94	12-14	the fire	
2	3617.64	1.1	*	36754	
2.0	10117-000		1. C	- Mark # 108	10

## Figure 8-19 : Unit selection grids within the pathways tab

Field Name	Purpose	Validation
Minimum Units Required	The minimum number of units that have to be accumulated for the qualification.	No Validation.
Maximum Units Required	The maximum number of units that can be accumulated for the qualification.	No Validation.
Minimum Credits	The minimum total credit value that has to be accumulated from all units.	No Validation.
Maximum Credits	The maximum total credit value that can be accumulated from all units.	No Validation.
Achievement Month Limit	The prior time period in months where grades achieved can be included toward the current qualification.	No Validation.

**Note:** Where more than one unit group has been added to the qualification, the min units, max units, min credits and max credits from each unit group must add up to the totals for each entered at the top of the RoC tab.

The check box on the left of the grid is used to include/exclude the unit on the pathway. If a unit is mandatory for the pathway select the check box on the right of the grid once the unit has been selected with the check box on the left.

**Note:** if the unit is de-selected on the left the mandatory flag will become de-selected automatically if it was selected too.

Where more than unit group has been added you may also set the number of units required per group for the pathway in the 'Units required' field. Once all the required changes have been made, click on the 'Save Pathway' button to save your changes to the database.

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#### **Deleting a Pathway**

You can delete a pathway by clicking the delete icon as shown below

Pathway	Default	Y	2 %

You will need to remove all assigned Units from the Pathway before attempting to delete it and you cannot delete the only remaining Pathway (you can delete the qualification if necessary).

### **Advanced Pathway Settings**

Once a pathway has been selected and had some units assigned you may setup some advanced settings for the pathway (also known as mutually inclusive and mutually exclusive units which may be part of your rules of combination). These allow rules regarding what a learner can register for. To setup the advanced settings click on the 'Advanced ...' button. This will display an in-page popup as shown below

Advanced Settings	
Add Now	
No Data To Osplay	
	de

## Figure 8-20 : In-page popup showing advanced settings for a pathway with no settings added

Click on the 'Add New' button to add a new setting, this will expand the popup as follows.

Advanced S	Advanced Settings		
Add New			
No Data To D	splay		
If solved unit.	3617 U1 (Mandatory)	-	
That	must select	+	
tint.	3617 U1 (Mandatory)	+	
	Save Cancel		Closer

## Figure 8-21 : In-page popup for advanced settings expanded for adding and editing settings

Field Name	Purpose	Validation
If select unit	The unit which the person has registered for	Mandatory: must be one of the selectable values
Then	The condition for this rule	Mandatory: must be one of the selectable values
Unit	The other unit which this rule effects	Mandatory: must be one of the selectable values

### Buttons available are

Button	Purpose
Save	Save the advanced setting

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Cancel	Cancel adding a new advanced setting to this pathway
Close	Return to the RoC tab
Add New	Add another advanced setting

Once an advanced setting has been added it will be displayed within a grid in the popup, click the price to edit the setting, or delete it by clicking the icon and confirming you wish to delete it.

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### **Other Units Constraints**

QCF enables learners to transfer credits that they have built up between qualifications. When Editing a QCF Framework Qualification Registration, this screen sets up the 'rules of combination', which allows other appropriate units (i.e. within the constraints) to be allocated to the qualification on the Units tab.

Unit Control Lines (Lines (Lin	Image: Control of the second	Chick         Abit Device Inc.           Abit Device Inc.         Inc.		Statute Van Statute - Statute Van Statut - St Statute Geel - Statute - St Statute - Statute - St
in incluse over		*	and the	Manazary
0 e porte 1			Jacob La Contra	
a martin a	1		and Post	

Figure 8-22 : In-page popup for other Units Constraints

Field Name	Purpose	Validation
Subsector	Subsector from which Other Units can be combined into this qualification.	Mandatory: must be one of the selectable values.
Level	Level (or difficulty) of the Other Units which can be combined into this qualification.	Mandatory: must be one of the selectable values.
Credit Cap	Maximum Credits which this qualification allows from Other Units	Mandatory
Achievement Month Limit	Not currently used	N/A
Mandatory	Whether it is Mandatory or Optional to include other units in this qualification.	Mandatory

### Buttons available are

Button	Purpose
Save and Close	Save the Other Units Constraint
Close	Cancel adding an Other Units Constraint to this qualification

Once an Other Unit has been added, it will appear in the grid on the 'Other Units Constraints' popup. Click on the icon to place the required record into edit mode, or delete it by clicking the icon and confirming you wish to delete it.

### **ROC Checker**

On the Qualifications screen there is a "Check RoC" button, which allows you to validate that your qualification has been set up correctly. The RoC Checker covers around twenty checks including everything from the qualification not having any units through to checks of the credit values of the qualification, units, groups, pathways and the different ways of combining each of these to achieve the overall qualification. Please note that the RoC Checker should be used in conjunction with your own manual procedures for ensuring that a qualification has been defined correctly.



### "Check RoC" button at top of Qualification Screen

Rules of Combination checked for all Pathways of selected Qualification.

heck all units for assigned grades	Succes
heck all pathways have units	Succes
heck all pathway groups have the minimum required units	Succes
heck all pathways have the minimum required units	Succes
heck all pathway groups can acheive the maximum required units	Succes
heck all pathways can achelive the maximum required units	Succes
neck the qualification has at least one grade	Succes
heck that all units on this qualification have a weight higher than 0	Succes
hetk all pathway groups can achieve the minimum credit for that group.	Succes
heck all pathway groups can achieve the minimum credit of the pathway	Succes
neck all pathway groups can achieve the maximum credit for that group	Succes
heck all pathway groups can achieve the maximum credit of the pathway	Succes
heck that the Qualification Credit Value has been entered	Succes
Neck that all pathway minimum credit values are at least the Qualification Credit Value	Succes
heck that at least one pathways credit value equals the Qualification Credit Value	Succes
s procedure checks for common qualification setup mistakes. It does not guarantee that t up correctly and should be used only as an aid to manual checking of the rules.	his qualification is

The following checks have been implemented:-

### Checks on all qualifications

- 1. Display a warning if any units of the qualification do not have at least 1 grade
- 2. Display a warning if a pathway doesn't have any units assigned to it
- 3. Display a warning if the minimum units required for a pathway group is greater than the number of units in the pathway group
- 4. Display a warning if the minimum units required for a pathway is greater than the number of units assigned to the pathway across all groups
- 5. Display a warning if the maximum units required for a pathway group is greater than the number of units in the pathway group
- 6. Display a warning if the maximum units required for a pathway is greater than the number of units assigned to the pathway across all groups
- 7. Display a warning if there isn't at least one grade setup for the qualification

## QCF framework Only checks

- 1. Display a warning if minimum credit required for a pathway group is greater than the sum of the credits for all units assigned to the pathway group
- 2. Display a warning if minimum credit required for a pathway is greater than the sum of the credits for all units assigned to the pathway across all groups
- 3. Display a warning if maximum credit required for a pathway group is greater than the sum of the credits for all units assigned to the pathway group
- 4. Display a warning if maximum credit required for a pathway is greater than the sum of the credits for all units assigned to the pathway across all groups
- 5. Display a warning if the qualification credit value has not been completed
- 6. Display a warning if the minimum credit for a pathway is less than the qualification credit
- 7. Display a warning if at least one pathway's minimum credit value isn't equal to the qualification credit value

### **Editing a Unit**

If you click on the folder icon next to a unit on the ROC tab, then the following is displayed

	1			Torr Linit 1					
tus+	ACOVE		Unit Name *	Auto Test la	ann:				
iable From			Unit Code *	C	edit Rased	replaced By			
gulatory Reg	gistration	Achievement G	ading Integra	tion Depe	ndent Items   El	ements   Equivalent Units	Planned Exemptions   Prerequisi	tes   Outcomes   Custom	Notes
Regulatory	y								
wning Body						Regulator Unit Number	A/502/3800		
evel		None	Ŧ			Subsector	1.1:Medicine and Dentistry		*
nit Assessment	Method	None Set			+	]			
egulatory Type		Not Set	*						
stal Unit Time		0	Guided Lea	rning Hours	10				

From here you can modify:

Field Name	Purpose	Validation
Pathway Unit Assessment Type	The assessment type. Setting this overrides the default value set at the unit level.	
Pathway Unit Weight	The weight value for this unit. Setting this overrides the default value set at the unit level.	
Pathway Unit Resits	The number of times assessment can be retaken. Setting this overrides the default value set at the unit level.	
Exclude from certificate	If checked then unit will be excluded on the qualification(s) certificate	Unchecked by default

## 8.9 Managing Qualification Grades

To manage the grades of a qualification select the qualification you wish to edit as described in section 8.5. When you have selected the required qualification click on the 'Grading' tab on the qualification page, you will then be presented with a screen similar to the one below

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egulatory	Registration	Achievement	Grading	Integration	Units	RoC	Groups	Prerequisites	Entry Requirements	Qualification Sets	Custom	Notes (
Gradin	g											
Add Nev	v Make Pas	s / Fail	G	rade Calculated	i Externa	ily 🗋						
No Data	To Display											
Grade Cal	culator											
	Grade Cale			÷								

## Figure 8-23 : Grading tab on qualification details page

To add a new grade click on the 'Add New' button, an in-page popup will then be displayed as shown below

Grade	 Min	Max	_	
A			Fail Grade	
A			Fail Grade	

## Figure 8-24 : In-page popup to add a grading to the qualification

Field Name	Purpose	Validation
Grade	The grade to specify a range for	Mandatory: must be one of the selectable values. Only one record per grade can exist per qualification
Min	The minimum value for this grade, for example to achieve a grade A the learner should score between 70 and 80%.	Must be a valid whole number >= 0 and <= Max if specified
Max	The maximum value for this grade	Must be a valid whole number >= 0 and >= Min if specified
Fail Grade	Flag to indicate if achieving this grade is a failure	N/A

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#### Buttons available are

Button	Purpose
Save	Save the grade
Cancel	Cancel adding a new grade to this qualification

Once a grade has been added it will appear in the grid on the 'Grades' tab. Click on the icon to place the required record into edit mode, or delete it by clicking the icon and confirming you wish to delete it.

#### 8.10 Understanding Qualification Grade Calculation

The overall grade achieved on a Qualification is calculated by considering the grades achieved on the registrations Units.

### **Qualification Grade Calculation** For all Units on the registration flagged as "Include on Award": sum (each Unit's Weight the Value of the Unit Grade achieved) and compare this summed value with the min/max fields of the Qualification to determine the appropriate overall grade.

The grading structure in Parnassus is very flexible to allow many different types of grades and the effects of combining Unit grades.

dd	Nev	v Make Pass / Fail	Grade Ca	culated Extern	ally 🔲	
		Grade	Minimum	Maximum	Fail	Grade Calculator
2	×	А	22	30		
>	×	В	13	21		Standard Grade Calc
2	×	с	6	12		Calculator Description
						Grade found in matrix based on sum of unit value multiplied by unit weight

#### **Custom Grade Calculator**

By default the Parnassus Standard Grade Calculator calculates Qualification grade by "adding up" Unit achievement and determining overall Qualification grade from the sum of Unit achievement. Parnassus allows custom grading methods, where a different formulae is applied to calculate the Qualification grade. Examples of this are;

- The Qualification grade is set to the lowest Unit grade excluding units with a weight of zero
- The Qualification grade is calculated but set as unsuccessful if a unit is failed with no more resits available

If you have grading like this please contact Gordon Associates as the custom logic will need to be defined and added to your Parnassus installation. The Grade Calculator feature means that the majority of these grading methods can be done as customisations and do not require a Parnassus upgrade.

### Grade Calculation Trigger

A Learners overall Qualification Registration Grade is (re)calculated when grades are recorded against its Units Registrations.

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*Important:* The Grade Calculation routine first checks the Rules of Combination for the Qualification.

If the Learners Registration does not pass all the ROC for Qualification then it will not attempt to calculate an overall Qualification grade.

If the Rules-of-Combination are passed for the Learners Registration then the system looks at all the achieved grades on the Units which have been flagged as "Inc. On Award" on the Registration.

0	Unit Code	Unit Name	Reg Date	Type Cred	it Level Grade	RPL	Attempts on reg (All)	Alt Ach	Pre-Reg Res Rel Date	Inc On Award	Use Best	Part Reg	Unit Reg
0	AutoTestUnit005	Test Unit 5	10/07/2018	M 1	1		0 (0)		No				

Each **Unit** which is part of the Qualification must be setup with the possible grades attainable, including "Fail Grades".

Save S	ave and Close	Close					*
Init Name *	Test U	Jnit 8					
Init Code *	Auto	estUnit008	1				
NO							
evel +	2		*				
redit Based L	Jnit 🗹						
efault Assess ype	Exte	rnally Tested	v				
	Арр	ly this Type to all	Pathways				
efault Weight	1	Default R	esits 99				
tatus +	Activ	e	Ŧ				
Dataila C	ading Depe	ndent Items	Elements Equiv	alent Units	Planned I	Exemptions	Prerequisite
Notes G		and the second					
Add New	Make Pass Grade	/ Fail Value	Minimum	Maximum	Fail		
Add New	Make Pass Grade A	Value 3	Minimum 6	Maximum 7	Fail		
Add New	Make Pass Grade A B	Value 3	Minimum 6 4	Maximum 7 5	Fail		
Add New	Make Pass Grade A B C	Value 3 2	Minimum 6 4 2	Maximum 7 5 3	Fail		

When a learner has been assessed on the **Unit**, the grade they attain for that unit is limited to the list added to the Unit.

When the Unit is created in Parnassus its grades can be set-up in a number of ways:

- 1. Pass and Fail only
- 2. Fail, Pass, Merit and Distinction
- 3. A, B, C, D, E, F

Or any 'logical' combination:

4. A, B , E, Fail



## "Fail Grades" on Units

Attainable Grades added to a Unit which are flagged as "Fail Grades" serve a particular purpose in Parnassus.

Grades attained which are flagged as a "Fail Grade" shows Parnassus that the Unit **has not been achieved**, and therefore the Rules of Combination check will not include that Unit and most likely fail the ROC. In this way, you can record an attained grade of "E" (flagged as fail-grade) for a Learner, but doing so will not cause the Qualification Registration to calculate an overall grade and suggest full achievement of the Qualification. If the "E" grade is not flagged as a "Fail-Grade" then the Unit is seen to have been achieved and will be included in the Rules of Combination check.

Note that the name of the Grade does not imply that it is a Fail grade!!! Parnassus will allow a grade called "Fail" which is not a Fail-Grade. This allows ultimate flexibility with the grading structures. For example, you could have both "E" and "F" set as fail-grades, or an alternative grade representing fail, such as "Refer". You could even have learners achieve a "Fail" but allow them to pass the Qualification (although this isn't recommended)

### Unit Grade – Minimum and Maximum Fields

When the Unit is setup and the attainable grades are added, each one has minimum and maximum values applied.

The Minimum and Maximum values are used when assessment "Elements" are used and the appropriate grade for the Unit needs to be calculated.

When Elements are **not** used, the Unit Grade attained is entered in Parnassus for a Learner, and the Minimum/Maximum values are irrelevant.

### Unit Weighting and Unit Grade Value

Each Unit has a "Default Weight" field (which can be over-ridden once added to a Qualification) and each Unit-Grade has a "Value" field. The weight indicates the importance of the Unit in terms of the overall Qualification Grade. The Value of the grade attained by a learner is multiplied by the weight of the Unit to give a figure used in the grade calculation. In this way some Units can be "worth" more than others within a Qualification.

Save Sa	ve and Close	Close					*
Add new Ur Save Save a Unit Name * Unit Code * UN Level + Credit Based Unit Default Weight Status + Default Weight Status + Details Gradin Notes Add New	Test 1						
Unit Code * UN 0 Level + Credit Based Unit Default Assessment Type 0 Default Weight Status +	T1						
Unit Code * UN Level + Credit Based Unit Default Assessment Type Default Weight Status + Details Grading Notes							
Unit Code * UN T Level + Credit Based Unit Default Assessment Type T Default Weight Status + Details Gradin Notes Arid New	None			v			
Unit Code * UN () Level + Credit Based Unit Default Assessmen Type () Default Weight Status + Details Gradin Notes Add New	iit 🔲						
Type	Extern	ally Assessed	i	v			
	Apply	this Type to a	all Pathways				
Default Weight	→ 1	Default	Resits 0				
Status +	Active	100000		•			
Details Gra	ding Depend	lent Items	Elements	quivalent Ur	its Planned	Exemptions	Prerequisit
Notes	Make Pass /	Fail					
Add New	Grade	Value	Minimu	m Maxin	num Fail		
Add New	Grade	Value	Minimu 76	m Maxin	num Fail		
Add New	Grade	Value 10 5	Minimu 76 40	m Maxin 100 75	num Fail		
Add New	Grade	Value 10 5 0	Minimu 76 40 20	m Maxin 100 75 39	num Fail		

## Worked Example 1

Qualification with two units, both Mandatory as defined by the ROC.

- Unit1 Weight: 2
- Unit2 Weight: 1

Both **Units** have the following Grades available:

		Grade	Value	Minimum	Maximum	Fail
0	×	А	10	76	100	
0	×	в	5	40	75	
0	×	E	0	20	39	1
0	×	Fail	0	0	19	×
			Unit G	rades		

Qualification has Following Grades available:

		Grade	Minimum	Maximum	Fail
0	×	A	21	30	
0	×	С	11	20	
0	×	E	0	10	

**Qualification Grades** 

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Recording grades against the Learners Unit Registrations (through any channel – Quick Grade Entry, Grade File Upload, manually etc.) will cause the Qualification Registration Grade calculation to trigger.

N.B. The Minimum/Maximum fields are for information only if Elements are not used.

Learner has:

- Grade of "B" recorded for Unit1
- No grade recorded for Unit2

Grade Calculation will stop when the ROC fails (because not all Mandatory Units have a non-fail grade recorded) – in which case no overall Qualification Grade will be calculated.

Subsequently, if the Learner achieved a grade of "A" for Unit2, the Qualification Grade calculation will be triggered again, ROC will pass now and overall Qualification Grade calculation will proceed.

### **Qualification Grade Calculation**

For all Units on the registration flagged as "Include on Award": sum (each Unit's Weight multiplied by the Value of the Unit Grade achieved) and compare this summed value with the min/max fields of the Qualification to determine the appropriate overall grade.

"Inc. on Award" Units	Unit Weight	Grade Achieved	Grade "Value"	Value x Weight
Unit1	2	В	5	10
Unit2	1	A	10	10
			Sum	20

The value of 20 is compared against the grade boundaries for the Qualification

Grade	Minim	num Maximum	Fail
A 😫 🔇	21	30	
o 😫 🔇	11	20	
🜔 😫 Е	0	10	

The overall Qualification Grade in this example is therefore recorded as a "C" grade as can be seen.

### Pass / Fail Grades

It is very common for Qualifications and their Units to be simply either achieved or not (e.g. in all QCF Quals/Units) so if each of the Qualifications Units are achieved (therefore fulfilling the ROC) then the overall Qualification is achieved.

This simple "achievement" grading model may at first-glance seem not to fit the Parnassus grading model as described above. However, with the use of the correct values it can be seen that a simple "Pass/Fail" model can be modelled in Parnassus.

#### Worked Example 2 (Pass / Fail)

Qualification with five units, all Mandatory as defined by the ROC.



- Unit1 Weight: 1
- Unit2 Weight: 1
- Unit3 Weight: 1
- Unit4 Weight: 1
- Unit5 Weight: 1

All **Units** have the following Grades available.

Add Many

nuu	TIC II	Make 1 do				
		Grade	Value	Minimum	Maximum	Fail
0	×	Pass	1	1	1000	
0	×	Fail	0	0		1
			Unit G	rading Ta	ıb	

### Qualification has Following Grades available:

De	tails	C	redit Based Units RoC	Grading Group	Prerequisites	Entry Requir
	Add	New	Make Pass / Fail	Grade Ca	lculated Externa	ally 🔲
			Grade	Minimum	Maximum	Fail
9	0	×	Pass	1	1000	
1	0	×	Fail	0	0	

### **Qualification Grades**

As with the previous worked-example, the overall Qualification Grade calculation will not be triggered until the Learner's registration first fulfils the Rules of Combination for the Qualification.

In this example, Qualification Grade will only be calculated when all 5 mandatory units have been awarded a "non-fail" grade. When the ROC are fulfilled the Qualification Grade calculation is the same as in all cases:

### **Qualification Grade Calculation** For all Units on the registration flagged as "Include on Award": sum (each Unit's Weight multiplied by the Value of the Unit Grade achieved) and compare this summed value with the min/max fields of the Qualification to determine the appropriate overall grade.

"Inc. on Award" Units	Unit Weight	Grade Achieved	Grade "Value"	Value x Weight
Unit1	1	Pass	1	1
Unit2	1	Pass	1	1
Unit3	1	Pass	1	1
Unit4	1	Pass	1	1
Unit5	1	Pass	1	1
			Sum	5

Therefore the Overall Qualification Grade is calculated thus:

The value of 5 is compared against the grade boundaries for the Qualification

		Grade	Value	Minimum	Maximum	Fail
0	×	Pass	1	1	1000	
0	×	Fail	0	0		1

The overall Qualification Grade in this example is therefore recorded as a "C" grade as can be seen.

You can see then that the default values created when you use the "Make Pass/Fail" buttons on Qualifications and Units essentially mean that if a Learners registration fulfils the Rules of Combination then they will achieve a Pass grade.

### **Unit Grade Calculation - Elements**

If a unit uses elements, the Unit Registration Details screen will display additional fields to allow marks to be entered for the individual elements. See Figure 8-25 : Element Grade Entry.

nit Code	Test T1	1										
egistration Date	24/0	9/2018		L	ast LRS	Action Nor Action Date Nor	ie ie					
clude On Award	2			7			8					
Brading Prerequisite	5		-1-0									
Mark	78											
Element	T	heory +										
Add To Current Asses	sment 🖉											
	Ad	d										
Attempts	1	-										
Grade	Assessment Date	Assessment Venue	Void	Last Modified Date	User	Alternative Achievement		Elements	Last LRS Upload	Release Date	Expiry Date	
							H	Enthusiasm 24/09/2018 Mark:40.00				
								Practical				
X D Pass :	24/09 <mark>/</mark> 2018			24/09 <mark>/</mark> 2018	ga	No	A	24/09/2018 Mark:63.00				

Figure 8-25 : Element Grade Entry

Field Name	Purpose	Validation
Registration Date	Date of registration	Mandatory
Include On Award	Whether unit is to be included on the award	Optional
Date	Date Grade achieved	Mandatory
Mark	Mark Achieved – numeric marks only.	Mandatory

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Element	Which element the mark was achieved against.	Mandatory: must be one of the selectable values.
Add To Current Assessment	Selected to add the Mark achieved to the current assessment. Not selected to create another assessment.	Optional

### Buttons available are

Button	Purpose
Add	Add the Grade achieved.
Save and Close	Saves any data changes.
Close	Returns to the Edit Qualification Registration – Units screen.
4	Display the Audit History Screen.

The number of Marks which can be added is dependent on the maximum number of resits which have been configured for the element. If a learner reaches the resit limit for an element a new unit assessment will be created and the previous assessment shown as failed. This will count as a unit resit and the unit resit will still be enforced. The resit counter for elements is then reset and the learner must re-take any elements they have already passed.

### Worked Example

In the above example (See Figure 8-25 : Element Grade Entry), the overall grade is calculated as follows:\_\_\_\_\_

	Mark	Weight	Total
Element		-	
Enthusiasm	40/50	1	40
Practical	63/100	2	126
Theory	78/100	1	78
			244

Divide by the total of the weights. 244 / 4 = 61

Compare this figure with the Unit Grading matrix and it gives an overall grade for the unit of C. See Figure 8-26 : Unit Grading Matrix.

Details	G	rading	Depende	nt Items	Eleme	ents Eq	uivalent Units	Planned E
Add	New	Ma	ake Pass / F	ail				
		Grad	le	Value	Μ	linimun	n Maximum	n Fail
0	=	Α		0	8	0	200	
0	×	в		0	7	0	79	
0	×	с		0	5	0	69	
0	×	D		0	0		49	

Figure 8-26 : Unit Grading Matrix

Note: Element details are not shown on certificates.

### 8.11 Scottish Qualifications in Parnassus

Parnassus has the following support for Scottish Qualifications, which is based on the English QCF Qualification framework. If you require further functionality in this area please contact GA.

### **Qualification Set Up**

Set the Qualification to be the Other Framework and select Credit Based, Type to "SVQ", and the Level as you require.

Regulatory	Credit Based	Registration	Achievement	Grading	Integration	Units	RoC	Groups	Prerequisites	Entry Req	uirements	Qualification Sets	Custom	Notes (1)	Docum
Regulat	tory														
Owning Boo	dy€							Primary Re	gulator Qual Nun	nber 🖲 🗌		]			
Primary Fra	amework	Other				5	] ,	ype		ĺ	Scottish Vo	ocational Qualification		*	
Level		1		* EQF	• 🗆		5	ubsector		[	0:None				•
		r	n							ſ		-			



### **Unit Set Up**

Set Credit Based Unit, Credit value and Level as you require

Save Save and Close Close			
nit Name *	Credit		
nit Code *	C1		
NO			
vel +	1	*	
edit Based Unit	Externally Account		
	Colonary Assessed		
	Apply this Type to all Path	invays	
efault Weight	1 Defa	ult Resits 0	
atus +	Active	*	
Details Grading Dependent Iten	ns   Elements   Equivalent U	nits   Planned Exemptions   Prerequisites   Notes	
Credit Value +	5	(Credit Based Only)	Î
Guided Learning Hours			
Total Unit Time	[		
Unit Expiry Date			
Result Release Date			
Operational Start Date in Centres	[		
Unit Available From	1	=	
	L		

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### 8.12 SQA Statutory Reporting available in Parnassus

SQA have specified 1 report they require and called it "SQA Accreditation". This report is available in version of 4 and above of Parnassus, and is run from the Standard Reports area of Parnassus as below.

Bath Data Ofqu	ual QDC	Launch Report B	uilder
oading Reports From	http://	/hatters	ortServe
Standard Reports			
Custom Reports			
Ofqual Learner Lev	el Vocatio	nal Data Request	-
Qualification Certifi	cates Due		
Quals Offered			
Quals Offered - by (	Centre		
Quals Offered - by (	Qualificat	ion	
Reg and Cert Summ	nary		
Registration Compl	etion by (	Ientre	
Registration Compl	etion by M	Month	
Registration Comple	etion by (	Qualification	
Registration Comple	etion by S	Site	
Registration Trends			
Registrations			
SQA_Accreditation_	Report		
Unverified ULN Stat	us		
XREP_CentresAndQ	uals		
XREP_CentresAndQ	ualSets		
XREP_CentresAndSi	tes		
XREP_Certificates			
XREP ContactDetail	<		

8.13 SQA Statutory Reporting - Information Provided By SQA

## SQA Accreditation Data Requirements from June 2011

### Introduction

All Approved Awarding Bodies are required to submit data returns to SQA Accreditation on a quarterly basis.

These data returns will now consist of totals for each accredited qualification, even if they are nil.

### **The Quarterly Periods**

Data should be submitted quarterly for both SVQ and non-SVQ candidates. We only need the overall group award details and do not need any information on individual unit achievements. This is due for the following calendar periods. Quarter 1 = 1st April - 30th June Quarter 2 = 1st July - 30th September Quarter 3 = 1st October - 31st December Quarter 4 = 1st January - 31st March

### **Data Collection Schedule**

The data must be submitted by awarding bodies to the SQA Accreditation Information Officer by the submission deadline documented in the Data Collection Schedule.

To check qualification types, please see the 'Qualification Listing' at <u>www.sqa.org.uk/accreditation</u>

### **SQA Defined report**

Please enter the full name of the approved awarding body
Please enter the number of registrations against each accredited qualification
Please enter the number of certifications against each accredited qualification
Please enter the SQA accredited qualification title
Please enter the four digit accreditation code
Please enter the two digit level code
Please enter the qualification type, this will either be 'SVQ', 'Regulatory' or 'Other'

### **SQA** Contact

Karen MacGregor Information Officer SQA Accreditation Tel: 0845 213 5247

#### 8.14 Qualification Sets

0

Qualification-Sets are predefined groups of Qualifications which make up a higher level of achievement. These are commonly used to model apprenticeships.

Parnassus allows:

- o Definition of Qualification-Sets
  - Name, Code and Qualifications which make up the Set
  - Recording of "Qualification-Set" Offered by Sites
  - Similar to Qualification Offered
- o Registration of Learners onto Qualification-Sets
  - This creates individual Qualification Registrations for each of the constituent Qualifications making up the set

### Adding and Editing Qualification Sets

This menu button accessed as part of the Qualification menu drop down list allows you to access the Qualification Sets set up in Parnassus.

s Centres	Venues	Learners	Qualification 👻	Certificates	Reporting	Contacts	GA Admir
			Qualifications Qualification Se Units	ets			

The following page is displayed listing all of the Qualification Sets that already exist in Parnassus. This shows the "Qualification Set Code", Name and the number of Qualifications that make up a Qualification Sets in a grid with paging enabled, sorted by Apprenticeship Code.



Qualification	Sets		
Acid New			
		Teech Code . * Search	
	Code	Neme	Qualifications
0 #	Australia Gallerico	Auto Tel: Qualification Sec 201	1
0 =	031	Quel Sec 1	1

>> Clicking on "Add New" or the Edit icon will take you to the Qualification-Set details shown below:

Qualification Set			
Sain Second Core			
Quality of Section 1	0	Patertak	
Qualification Sections 1			
[Automat]			
No Qualifiarios			

>> Complete the details as appropriate and click "Save" or "Save and Close"

Field Name	Purpose	Validation
Qualification-Set Code	Used to identify the Set	Mandatory
Qualification-Set Name	Used to identify the Set	Mandatory
Product Code	Used if applicable fee is raised from Parnassus (to Hermes).	

### Adding Qualifications to the Qualification-Set

Multiple existing Qualifications can be added to the set. These must exist in Parnassus already.

>> Click "Add New Qualification" to launch the popup form shown below, allowing you to choose one or more Qualification to add to the Qualification-Set.

You can search all the Qualifications in Parnassus to add to this set:

>> Enter the search text and select from the drop-down list whether so search by:

- Qualification Code
- QN
- Qualification Title

>> Tick the select box ( □ ) for each of the Qualifications which need to be added to the Qualification-Set. You can add more Qualifications later if needed.

arch		Qualification	Code	<ul> <li>Search</li> </ul>			
QN	Code	Credit	Level	Title	Status	Standalone	à
	L1S		None	Level 1 Skills	Approved		
	LNew		None	Level 1 Skills	Approved		
0	Odd1	З	None	odd units	Approved		
500/680	4/0 AUTOTESTQUA	4L1	3	Testing Qualification 1:NQF-(1 pathway, 2 groups, Pass/Fail- Generated by 'auto' testing	Approved		•

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### **Removing Qualifications from a Qualification-Set**

Qualifications on the Qualification-Set can be removed from the Qualification-Set by clicking the red-cross ( 🗱 ) next to the appropriate Qualification. This will not delete the under-lying Qualification from Parnassus.

Workflows	Centres Venues Learners	parmassuum says unification • Certificates Are you sum you wont to delete this item?
ualification Set		CK Carriel
Save and Oove Clove		
willflation Set Code *	Q52	Product Code
ualification Set Name *	Qual Set 2	
Qualifications Add New Qualifications		
	Code	Title
×	135	Level 1 Skills

### **Deleting Qualification-Set**

Qualification Sets can only be deleted when there are no learner registrations against them.

When there are learner registrations against the qualification set a message to the user is displayed and the Qualification-Sets deletion is not allowed to proceed.

parnassusvr	i says
Are you sure	ou want to delete this item? In doing so it will remove
this set from	eing offered at all sites and will delete any Registration
Import File ite	ns that are registered on this set.
Import File ite	ms that are registered on this set.

## 9. Unit Maintenance

As well as being able to maintain units from within the qualification a global view of units within Parnassus is also available. To access this, click on the 'Units' option on the top menu.

When you have clicked on the Units option on the Qualification drop down you will be presented with the following page.

Units									
Add New									
			Search	Code	* Search				
	UN	Code	Title	Credit	Level	Status	Regulatory Type	Registration End	No. of Notes
0 #		\$5/5	Stream to SHOUTCast / ICECast Server		None	Active			0
0 #		52938	StudensPottersione/UB		Entry 3	Active			0
0 #		TAD	TAD		None	Active			0
0 #	A/502/3800	AutoTextUnit201	Test Livis 1		Nore	Arrive			0.0
0 #		AutoTestUnit010	Test Unit 10	1	.4	Active			0
0 #		AutoTestUnit011	Test Unit 11 (elements)	1	.t.	Active			0

Figure 9-1 : Units listing page

#### **Unit Search**

<sup>9.1</sup> Units Listing Page

The Unit Search options available to search by are:

- Code
- Name
- UN

The order in which the Search options are displayed is configurable.

Buttons available are

Button	Purpose
Search	Click on 'Search' to list all Units from the criteria selected above.

The Unit Search allows the use of wildcards to increase the flexibility of searches.

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#### 9.2 Adding a New Unit

Clicking on the 'Add New' button will take you to the unit creation page as shown below where you can create the unit with no details pre-populated. Alternatively you can copy a unit by selecting the unit from the units list.

Add new Unit		
Save Save and Close	Gose	
Status - Active	Unit Name *	
Available From Review Date	Unit Code * Re Credit Based	System By
Regulatory Registration	Achievement   Integration   Custom	
Regulatory	()	
Owning Body Level	None *	Regulator Unit Number  Subsector Olione
Unit Assessment Method 😝	None Set 👻	33 <u></u>
Regulatory Type	Not Set	
Total Unit Time	Guided Learning Hours	

### Figure 9-2 : In-page popup to add a new unit

**Note:** this page will popup in a new browser window rather than replacing the list of units listing page

The different parts of the unit are organised in tabs below the main details, these are Regulatory, Registration, Achievement and other tabs will become available when the new unit is saved.

Unit Available	The date that the unit is available from for	Optional: must be a
From	Credit Based units	valid date

Test Unit	est Unit 10				
Save Save	and Dave Clove			4	
netue 4	Active	* Unit?Name *	Twee Unite 10		
ulative From		ans Code *	AutoTettUnid10 Restaural By		
eview Date	0		Credit Based		

Field Name	Purpose	Validation
Status	Unit status - Active/suspended	Mandatory: must be one of the selectable values
Unit Name	The name of the unit	Mandatory
Available From	The date that the unit is available from	Optional: must be a valid date
Unit Code	The code of the unit	Mandatory
Replaced by	Details of a unit that replaces this unit	Optional
Unit Review Date	The date when a unit will need to be reviewed prior to the expiry, which must be earlier than the expiry date.	Optional: must be a valid date
Credit Based	Whether the unit is a credit based unit	Optional

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)	Level +		•
	Credit Based Unit	4	
	Default Assessment	Externally Assessed	_]

Figure 9-3 : Credit based unit tick box

When ticked this will activate the Credit value box so the credit value of the unit can be stored.

Buttons available are

Button	Purpose
Save	Save the record with the data entered and remain on this page to continue editing the record.
Save and Close	Save the record and return to the Units Listing page as shown in section 9.1.
Close	Return to the Units Listing page as shown in section 9.1 without saving any changes made.

Once a unit has been created it can be assigned to a qualification as described in section 0.

## **Regulatory Details Tab**

This tab shows the details of regulatory information.

Regulatory						
Dwning Body			Regulator Unit Number 👩			
eval	None	*	Subsector	0:None	×	
Init Assessment Method 😝	None Set					
legulatory Type	Not Set *					
otal Unit Time		Guided Learning Hours				

Field Name	Purpose	Validation
Owning Body	The organisation/s recognised by Ofqual to award the accredited qualification.	Optional
UN	Unit Accreditation Number	Optional
Level	Difficulty level of the unit, between entry level and level 8	Mandatory
Subsector	Industry sector the unit belongs to	Mandatory: must be one of the selectable values
Unit Assessment Method	How the unit will be assessed. Unit Assessment Method is the value held on The Register (RITS) so cannot be customised.	Mandatory: must be one of the selectable values

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Regulatory Type	The regulator for the unit	Optional
Total Unit Time	Total number of learning hours required for the unit	Optional
Guided Learning Hours	Number of hours of learning time for the unit under the instruction of a teacher/trainer/tutor.	Optional

**Note:** Unit Assessment Method is only held at the unit level, not at qualification unit level

## **Registration Details Tab**

This tab shows the details of registration information.

			Grading	incegration.	Dependent Rema	crements
Registra	tion		-1			
Operational S	Start Date in C	entres	0;	perational End I	Date in Centres	

Field Name	Purpose	Validation
Unit Expiry Date	The date on which a unit becomes no longer available for learners to be awarded credit for that unit, even if the learner has already passed the unit. Parnassus checks this date when a learner is registered / certified on a qualification and if the date has passed then registration/certification is not allowed.	Optional: must be a valid date
Operational Start Date in Centres	The date that the unit can be registered from as specified by the awarding organisation.	Optional: must be a valid date
Operational End Date in Centres	The date that the unit can be registered to as specified by the awarding organisation.	Optional: must be a valid date

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### 1.3.1 Achievement Details Tab

This tab shows the details of achievement information. It has two sections for Achievement and Certification information.

Regulatory	Registration	Achievement	Grading	Integration	Dependent Items	Elements	Equivalent Units	Planned Exemp
Achiev	ement							
Default Ass	essment Type 🚯	Externally As	sessed	•	Apply this Type to a	ıll Pathways	Allow E\	/ Allocation 🗍
Default Wei	ight	1			Apply this Weight to	all Pathways		
Default Res	its	0		1	Apply this Resists to	all Pathways		
Has Unit Ma	arks			-				
Credit Value (Credit Base	e + ed Only)		Result Re	elease Date				
Certific	ation							
Certificate 1	litle							
Certificate 1	lemplate 🕕	StandaloneU	nitCertificat	teBatch		i	•	

Field Name	Purpose	Validation
Default Unit Assessment Type	The default unit assessment type. This can be customised to add additional types. This value can be applied to all pathways if you use the button to the right.	Mandatory: must be one of the selectable values
Allow EV Allocation	Whether the unit assessment can be direct claimed (unticked) or must be checked by an allocated EV user (ticked)	Optional: If ticked the unit will appear in the Unit DCS tab where it is offered by a site.
Default Unit Weight	The weight value for this unit. This value can be applied to all pathways if you use the button to the right,	Optional: must be a valid whole number >= 0 where specified
Default Unit Re-sits	The number of times assessment can be retaken. This value can be applied to all pathways if you use the button to the right.	Optional: must be a valid whole number >= 0 where specified
Has Unit marks	Indicates unit marks are in use	Optional
Credit Value (Credit based Only – enabled when Credit based unit is ticked see Figure 9-4 below)	The credit value the unit contributes to accumulation of credit for a qualification. A unit cannot have different credit values on different qualifications. One credit represents 10 hours notional learning. (this equals Guided Learning Hours (see below) + self study time etc.)	Mandatory
Result Release Date	The date where the assessment results may be released	Optional
Certificate Title	This title can be used on the certificate if required to be different from the Unit Title.	Optional
Certificate Template	Template will only be used when creating a unit certificate without first selecting a qualification	Optional

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**Note:** Default Unit Assessment Type is a default for the unit and can be changed when a unit is assigned to a qualification, so a unit's default value could be 'Externally Assessed' but on a particular qualification it could be 'Internally Assessed'

### 9.3 Deleting a Unit

To delete a unit go to the Units Listing page as shown in section 9.1 and locate the unit you wish to delete.

Once you have identified the correct unit, click on the 🗱 icon, you will then be prompted as to whether you really wish to delete this record as shown below.

OK Cance

### Figure 9-5 : Confirmation of deleting a unit

Click 'OK' to delete the record else click 'Cancel' to stop the deletion.

In order to delete a unit it must NOT ...

- Be assigned to any qualifications
- Have any learner registrations

### 9.4 Editing a Unit

To edit a unit go to the Unit Listing page as shown in section 9.1 and locate the unit you wish to modify. Click on the  $\bigcirc$  icon to select the record. You will then be presented with a page displayed in a popup window similar to the one below.


	Sav	e and Close Cl	se					
ime	•		Test Ur	it 11 (elements)				
de			AutoTe	stUnit011			UN®	
			1		Ŧ	ĺ		
Asse	essm	ent Type 0	Extern	ally Examined			Apply this Type to al	Il Pathways
Wei	ght		1				Apply this Weight to	all Pathways
Res	its		999				Apply this Resists to	o all Pathways
2			Active	-		1	Credit Based Unit	2
		Grade '	/alue	Minimum	Maximum	Fail		
		rass .		50	100	-		
		an i		U	-3			



From here you can change the unit's details, for a list of the field definitions see section 9.2.

Additional buttons available when editing the unit are

Button	Purpose
Apply this Type to all Pathways	
Apply this Weight to all Pathways	
Apply this Resists to all Pathways	

### **Grading Tab**

To automatically add a pass and fail grade, click on the 'Make Pass/Fail' button.

Details	Grading	Dependent Items	Elements	Equivalent Units	Planned Exemptions	Prerequisites
Notes						
Add N	ew Ma	ke Pass / Fail				
100200						

You can also use the grading types in the drop down menu to set the grading by selecting the item and clicking the 'Create Defaults' button as below.

adir	g									
dd Nev	Ma	ke Pass / Fail				Grading Type	Pass/Merit/Dist	inction/Fall	Create De	faults
				14404075			None Set			
	Grade			Value	Fail		Pass/Fail			
0 #	Distinction			3			Pass/Merit/Dist	inction/Fail		
0 =	Merit			2			11			
0 =	Pass			31 I						
0 =	Fail			0	22					

To add a new customisable grade, click on the 'Add New' button and an in-page popup will then be displayed as shown below.

aldue		Value	Min	Max	
A	*				Fail Grade

Figure 9-7 : In-page popup for adding a new unit grade

Field Name	Purpose	Validation
Grade	The grade to specify a range for	Mandatory: must be one of the selectable values. Only one record per grade can exist per qualification
Value	The value for this grade, this will get multiplied by the unit weight to provide a value for identification of the qualification grade which has been achieved.	Must be a valid whole number >= 0 if specified
Min (not currently used)	The minimum value for this grade	Must be a valid whole number >= 0 and <= Max if specified
Max (not currently used)	The maximum value for this grade	Must be a valid whole number >= 0 and >= Min if specified
Fail Grade	Flag to indicate if achieving this grade is a failure	N/A

#### Buttons available are

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Button	Purpose
Save	Save the grade
Cancel	Cancel adding a new grade to this unit

Once a grade has been added it will be displayed within a grid in the popup, click the vicon to edit the grade, or delete it by clicking the icon and confirming you wish to delete it.

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### **Integration Tab**

The integration tab shows the details of the integrated items you may have in two sections integration and finance.

ince@rution				
wailable for Exam Booking	ps 🔽	Availability	Not Set	٠
Minimum Age for Exam Bookings		Maximum Exam Bookines		

Field Name	Purpose	Validation
Available for Exam Bookings	To indicate whether the unit is available for exam bookings – this by default is set to be available.	Optional
Availability	Shared/Restricted/Private Whether available to all awarding organisations or restricted to specific awarding organisations.	Mandatory: must be one of the selectable values
Minimum Age for Exam Bookings	How old in years the learner should be to take the Exam	Optional
Maximum Exam Bookings	A number to show the maximum Exam Bookings that are allowed for this unit	Optional
Chargeable	Used to control business logic of raising fees when used in conjunction with Hermes link to finance module.	Optional. Ticked or Unticked checkbox
Product Code (GP)	The product code – used in conjunction with Finance modules	Optional

### **Dependent Items Tab**

The dependent items tab shows all of the qualifications which share the unit which is being edited.

Details	Grading	Dependent Items	Elements	Equivalent Units	Planned Exemptions	Prerequisites		
Notes								
Qualific	ations shar	ing this u <mark>n</mark> it						
Qual	Code		Qualific	ation Name				
L1S	L1S			Level 1 Skills				
LNew			Level 1 S	kills				

Figure 9-8 : Units - Dependent Items Tab



#### **Elements Tab**

Parnassus has the concept of Elements, which allows units to have multiple grades. e.g. where multiple grades are required because there is both a theory and practical aspect to the unit. Elements are set up at the global-unit level; therefore every qualification using the unit will have the same elements.

Details	Grading	Depend	ent Items	Elements	Equivalent Units	Planned Exemptions	Prerequisites
Notes							
Add N	ew Gradin	g Type:	Highest_	Element			
	1		Highest_E	lement			
No Ele	ements		Lowest_El	ement			

Field Name	Purpose	Validation
Add New	Select to enable the addition of elements.	Optional
Grading Type	Grading type specifies the method that will be used for grade calculation for this element. Lowest_Element: The lowest mark of all the elements is used to look up the unit grade in the unit grading matrix. Weight is ignored. Highest_Element: The highest mark of all the elements is used to look up the unit grade in the unit grading matrix. Weight is ignored.	Mandatory: must be one of the selectable values.

#### Buttons available are

Button	Purpose
Add New	Add a new element to the unit.

To add a new element, click on the 'Add New' button and an in-page popup will then be displayed as shown below.

Code		
Name		
Maximu <mark>m</mark> Mark		
Assessment Type	Externally Assessed	
Weight		
Maximum Resits		

Figure 9-9 : In-page popup for adding a new element



Field Name	Purpose	Validation
Code	Code to identify the element.	Optional
Name	Name to identify the element.	Optional
Maximum Mark	The maximum mark that can be achieved from the element.	Optional: defaults to 100
Assessment Type	How the unit will be assessed.	Mandatory: must be one of the selectable values.
Weight	Weight of unit within grade calculation.	Optional: defaults to 1
Maximum Resits	Maximum number of times that a grade can be entered for this unit.	Optional: defaults to 1

#### Buttons available are

Button	Purpose
Save and Close	Save the element and close the popup
Close	Close the popup and don't add a new element

Once an element has been added it will be displayed within a grid in the popup.

Details	Grading	Depende	ent Items	Elements	Equivalent Units	Planned Exemptions	Prerequisites
Notes							
Add N	ew Gradi	ng Type:	Highest_I	Elem <mark>en</mark> t	Ŧ		
Code	e Title	e	Max	Weigh	t Assessme	ent Type R	esits
Enth1	Enth	usiasm	100	1	Externally 4	Assessed 1	
P1	Prac	tical	100	1	Externally 4	Assessed 1	
Т1	Theo	огу	100	1	Externally A	Assessed 1	

Figure 9-10 : Unit Element List

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#### **Editing Elements**

Elements can be editing by clicking the icon () next to the Unit's Element you wish to edit.



When you click the folder icon, the row becomes editable, with a "Save" but at the far right of the row. Each of the Elements fields can be edited.

Code	Title	Max	Weight	Assessment Type	Resits	
e1	Enthusiasm	100	1	Externally Asse 🔻	1	Save

#### **Equivalent Unit Tab**

Equivalent Units – Based on achievement from Credit based units.

"Opportunities to count credits from a unit/s from other qualifications or from unit/s submitted by other recognised organisations towards the qualification in place of mandatory or optional unit/s"

Each Unit in Parnassus can be setup with one more Credit Based unit which is "equivalent".

Once this is done, any Learner registered on the Unit in Parnassus, can be recorded as "exempt" having the "equivalent unit" (assuming that evidence is provided) and an appropriate grade can be recorded for the Unit can be entered (see "Alternative Achievement" in the Learner Registration section for details of recording this).

By predefining specifically which Units can be used the Awarding Body can "control" how these are used.

### Adding an "Equivalency"

>> In the Unit Details page of the Parnassus Unit which you want to change, go to the "Equivalent Units" tab.



>> Click "Add New Equivalency"

>> In the popup form, enter a code and description which will help identify the specific equivalency:

Equivalency code *	Unit A	
Description	Unit A City & Guilds	
Units	No Unit Equivalencies	 
		Add U

>> Click "Save"

#### Add "Equivalent Unit" to Equivalency

>> Click "Add Unit" to record for this equivalency, the Credit Based unit(s) which are applicable. >> In the popup form, enter the UN, Code and Title of the Credit Based unit which is equivalent to the Parnassus Unit being updated.

Add Unit to Equivalen	cy	
UN *	000/0000/0	
Equivalent Unit Code	Unit A	
Equivalent Unit Title *	Unit A City & Guilds	]
	Save and Close Clo	se

>> Click Save and Close

Additional Equivalent Units can be recorded as above.

The Equivalent Units tab will list all the Units considered equivalent.

Grading	Dependent Items	Elements	Equivalent Units	Planned Exemptions	Prerequisites
ew Equival	ency				
on Equiru					
	Equivalency Cod	e		Description	
	Equivalency cou	-		Description	
×	Unit A			Unit A City & Guilds	
	1.11.2				
	ew Equival	Equivalency Equivalency Cod	Equivalency Code	Equivalency Equivalency Code	Grading       Dependent items       Elements       Equivalent units       Planned Exemptions         ew Equivalency       Equivalency Code       Description         Whit A       Unit A City & Guilds

#### Delete Equivalent Unit

>> From the "Equivalency" popup, click the red-cross 🗱 next to the unit whose equivalency you wish to delete.

#### Edit Equivalent Unit

>> From the "Equivalency" popup, click the folder-icon Sonext to the unit whose equivalency you wish to edit.

>> Edit the popup form as necessary:

>> Click "Save and Close"

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#### **Planned Exemptions**

This has been designed in line with QCA document "QCA/09/4284 – Exemptions in the Qualification and Credit Framework"

**Planned Exemptions** allow the Awarding Body to predefine any type of exemption which they agree or design when setting up a Qualification and its Unit.

Once these have been setup, a Learner registered on a Unit, can be shown to be exempt from study and assessment based on one of the predefined "Planned Exemptions" (see "Alternative Achievement" in the Learner Registration section for details of recording this).

#### Adding a "Planned Exemption"

>> Open the Unit Details page for the Unit in Parnassus against which the planned-exemption is to be recorded

>> Go to the "Planned Exemption Tab" for this Unit:

Details	Grading	Dependent Items	Elements	Equivalent Units	Planned Exemptions	Prerequisites	Notes
Add N	ew Planned	Exemption					
A00 N	ew Plaimeu	Exemption					
No Ex	emptions						

#### >> Click "Add New Planned Exemption"

>> The "Add Planned Exemption" popup form will appear:

Add Planned Exemption	
Planned Exemption Code *	
Qualification Achieved *	1.
Unit(s) Achieved	
Description	h
Achievement Month Limit	Save and Close Close

Field Name	Purpose	Validation
Planned Exemption Code	The code used to identify this Exemption when adding to a Learners Registration	Mandatory
Qualification Achieved	The Qualification	Mandatory
Units(s) Achieved	Free text to list any specific Units associated with this Planned Exemption	
Description	Free text for any additional descriptive information	
Achievement Month Limit	"The length of time after an [qualification] is gained by a learner that it may still count	Numeric

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	towards the qualification should be set out for each Credit Based unit or exemption" (QCA/09/4284)	
--	---	--

>> Complete the form with the details of the "planned Exemption":

>> Click "Save and Close".

#### **Unit Outcomes**

Unit outcomes can be used to indicate aspects of the unit and/or what the learner should be capable of once they have achieved a non-Fail grade against the unit, and can appear on the certificate. Unit Outcomes can be added and saved in the Units Outcomes tab as below:

	Test Unit 11 (elements)				
ode *	AutoTestUnit011		UN B		
+	1			80.	54
ault Assessment Type	Externally Examined	*	Apply this Type to a	ll Pathways	
ault Weight	1		Default Resits	999	
tus +	Active		Credit Based Unit	2	
etails Grading D	ependent Items   Elements   Equiva	lent Units   Planned Exe	emptions Prerequisites O	utcomes Notes	
Add Unit Outcome					
Co	le Title				
тио 😫 📀	1 Can display confic	dence and knowledge of	subject		
12.5	2 Can document the	e subject knowledge			
ро ដ 📀					

To add unit outcomes click the Add Unit Outcome button and add the outcome code and outcome title in the popup as below:

Add Unit Out	come
Code	
Title	
	Save Cancel

#### **Custom Tab**



Any custom data for the unit is shown here. Please contact Gordon Associates if you need information on this tab.



### **Notes Tab**

Spincol k	Registration	Achievement	Grading	Integration	Units	RoC	Groups	Prerequisites	Entry Requirements	Qualification Sets	Custom	Notes (1)
-												
lotes												
	-			1	_	_	_					
Attac	h a File Choos	e file   No file ch	osen	Priority 📋	Sav	e Note						
	Note											
	RachelAOAd regulatory e	min confirmed t nd dates,	the increasin	g of our end	l dates p	oast tha	at of their	associated				
					nel							

You can save notes and attachments concerning the unit here.

05	Con	ling	21	Init
9.0	COP	yiiig	a	JIII

below

If you have unit to create that is similar to an existing unit then you can copy the details. You select the unit you wish to copy from the unit list by clicking on the  $\circ$  icon to select the record.

Save Save and Elose	Copy Unit Close							
Status + Active	•	Unit Name *	st Unit 14 - Pre Reg A	ssessment Test				
Available From		Unit Code • A	toTestUnit014	Replaced By				
Review Date			Credit Based					
Regulatory Registration	Achievement   Gra	ding   Integration	Dependent Items	Elements Equivalent	Units Planned Exemptions Prev	quisites Outcomes C	ustom Notes	
Regulatory								
Owning Body				Regulator Unit Nur	mber@			
Level	None	Ŧ		Subsector	0:Nane			
Unit Assessment Method	None Set			* Category	Unspecified		*	
Regulatory Type	Not Set *							
Tarad Date Date		Guided Learnin	Hours					
Focal Dritt Prine								

Vew Unit Co	de I
lew Unit Iame	Test Unit 14 - Pre Reg Assessment Test
lew UN	
lote : All det	tails of the unit will be copied with the exception of Notes, Prerequisites, Equivalent Units and

The new unit is created and will copy the unit details and Regulatory, Registration, Achievement and Grading from the original unit.

## 10. Certification

"Certification" is the process of creating Certificates for Unit and Qualification based on the Rules-of-combinations and data setup for those Qualifications and Units. Certificates are created in "batches", which can subsequently be printed.

To enter the Certification area there is menu item in the Parnassus main menu.

We now have the ability to produce eCertificates and also to allow the use of QR codes on certificates which will enable them to be checked via the QR code. Please contact Gordon Associates if you would like to discuss using any of these options.

### 10.1 1 Batch Listing Page

Once you have clicked on the Certification option you will be presented with the following page

Batches				
New Batch Wizard Create Certificates from Event				
Ribers Centre (M * Stef All OShow ny baches ony Sinde successfully primed baches : Baches to Daples (10	•			
Batch List Mark selected as printed OK Mark selected as not printed				
Select All Status Batch Transcript Date (Across all pages) # Printed Created	Batch Qualification Title F	Batch Request Centre	Site	Created # By Certs
<ul> <li>A S Not 1728</li> <li>A S Printed</li> <li>A S S S S S S S S S S S S S S S S S S S</li></ul>	Full Testing Qualification 1 : NQF - (1 pathway, 2 groups, Pass/Fail - 2 Generated by 'auto' testing scripts) e	133:Qualification1 1442:Excellence Centre event	1442.001.Site 1	adminav 1
<ul> <li>is if Not 1727</li> <li>is if Printed</li> <li>is if 1727</li> <li>is 13/10/2021</li> <li>is 16/17/17</li> </ul>	Full one unit	1445:TFS 2155	AIC C	GA 1

#### Figure 10-1 : Batch listing page

Option/Button	Purpose
New Batch Wizard	Create a new batch as described in section 10.2
Create Certificates from Event	Create a Certificate batch from an Event (please speak to us if you wish to use events)
Centre	Centre Filter to apply to Batch List display
Site	Site Filter to apply to Batch List display
Show my batches only	When this flag is checked only those batches which you have created will be displayed in the batch list

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Hide printed batches	When this flag is checked only those batches which have not yet been printed will be displayed in the batch list
Batches to Display	Number of batches to display per page
0	View the selected batch, see section 10.3
6	Print the batch, see section 10.4
T	View the Certificate Transcript, see section 10.5
S	View the Certificate Batch Summary, see section 10.6

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01242 529820

### 10.2 Creating a New Batch

Click on the 'New Batch Wizard...' button to follow the process of creating a new batch. The following page of the wizard will then be displayed

Certification Wizard			
Choose Certification Type			
Qualification			
OUnit			
Partial			
Batch Request			
			Next

Figure 10-2 : Certification type selection page

As can be seen from the above image, there are several types of certification available. These are detailed in the following sub-sections. Select the required certification type and click the 'Next' button.

Option	Description
Qualification	A full qualification certificate.
Unit	A certificate for an individual unit.
Filter By Qualification *	When checked the wizard will show the qualification select page of the wizard. When unchecked this will jump to the unit selection page of the wizard. This is only applicable for unit certificates.
Partial	<ul> <li>A partial certification may also be referred to as a Transcript or a Certificate Of Unit Credit and can be used to mean any of the following:.</li> <li>i) Confirmation of the achievement of a number of units (or a single certificate); normally used if the learner is not planning to complete the qualification.</li> <li>ii) An informal ** draft of a full certificate for a qualification for review by centres/candidates before Full Certificate is printed.</li> <li>iii) An informal ** listing of the units that a learner has completed - this document is to be used in association with the Full Certificate</li> </ul>
Batch Request	This option is for use with a service layer – please contact GA for more details.

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\*\* not subject to OfQual accreditation.

\* This checkbox can be made to default to checked or unchecked and also this functionality can be made visible or invisible depending on the user requirements.

### **Qualification and Unit Selection**

For Batch types selected of Qualification / Unit (With 'Filter by Qualification check box checked') or Partial, once you have clicked next from the Batch Type selection page in the wizard you will be shown the following page

elec	ct Qualification					
ick i	on the folder icon of t	he qualification you wish to select.	Code		Search	
			Onl	y show qualif	ications with reque	sts
	Code	Title	Level	Status	Standalone	Ĩ
2	L1S	Level 1 Skills	None	Approved		
D	LNew	Level 1 Skills	None	Approved		
>	Odd1	odd units	None	Approved		
0	AUTOTESTQUAL1	Testing Qualification 1 : NQF - (1 pathway, 2 groups, Pass/Fail - Generated by 'auto' testing scripts)	1	Approved		
D	AUTOTESTQUAL10	Testing Qualification 10 : NQF - (1 pathway, 2 groups, Pass/Fail - Generated by 'auto' testing scripts)	1	Approved		1
>	AUTOTESTQUAL2	Testing Qualification 2 : NQF - (2 pathway, 3 groups, ABCD, Pre Req) - Generated by 'auto' testing scripts)	2	Approved		
>	AUTOTESTQUAL4	Testing Qualification 4 : QCF - (2 pathway, 2 groups, ABCD - Generated by 'auto' testing scripts)	4	Approved		

Figure 10-3 : Qualification selection page

Button	Purpose	
0	Select the r	required qualification and go to the next page
Search	Enter the fu search. See examples c	Ill or partial qualification code you wish to use in the e section <b>Error! Reference source not found.</b> for of possible Wildcard searches
Previous	Return to th	ne certification type selection page
Option		Description
Only show qualifications	with requests	Allows restriction of search criteria to Learners who have requested a certificate

For Batch types selected of Unit (With 'Filter by Qualification check box un-checked'), once you have clicked next from the Batch Type selection page in the wizard you will be shown the following page

elect Unit	
	Code Search
Code	Title
AutoTestUnit001	Test Unit 1
AutoTestUnit002	Test Unit 2
AutoTestUnit003	Test Unit 3
AutoTestUnit004	Test Unit 4
AutoTestUnit005	Test Unit 5
AutoTestUnit006	Test Unit 6
AutoTestUnit007	Test Unit 7
AutoTestUnit008	Test Unit 8
AutoTestUnit009	Test Unit 9
AutoTestUnit010	Test Unit 10

Button	Purpose
O	Select the required unit and go to the next page
Search	Enter the unit code you wish to use in the search. See section <b>Error! Reference source not found.</b> for examples of possible Wildcard searches
Previous	Return to the certification type selection page

If you have selected a qualification then you will be shown one of the following pages depending on the type of the batch being created

Batch Type	Page	
Qualification or Partial	Certification Wizard Selected Qualification: Level 1 Skilts (Change)	
	Previous Next	

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Unit (With	Certification Wiza	ard
Qualification check box checked')	Selected Qualification: Leve	1 Skills (Change)
,	All Units	
	Code	Title
	T1	Test 1
	AutoTestUnit004	Test Unit 4
	AutoTestUnit005	Test Unit 5
	AutoTestUnit006	Test Unit 6
		Previous Next
Linit (\\/ith		Previous
'Filter by Qualification check box un- checked')	Certification Wize	Code Search
	Code	Conly show Units with requests
	AutoTestUnit001	Test Unit 1
	AutoTestUnit002	Test Unit 2
	AutoTestUnit003	Test Unit 3
	AutoTestUnit004	Test Unit 4
	AutoTestUnit005	Test Unit 5
	AutoTestUnit006	Test Unit 6
	AutoTestUnit007	Test Unit 7
	AutoTestUnit008	Test Unit 8
	AutoTestUnit009	Test Unit 9
	AutoTestUnit010	Test Unit 10
		1 2
		Previous Next.
Button	Batch Type	Purpose
0	Unit	Select the unit you wish to produce the batch for and continue to the next page
(Change)	All	Return to the qualification selection page
Previous	All	Return to the certification type selection page
Next	Qualification or Partial	Confirm use of this qualification for this batch and continue to the next page
Apyupita	arked as 'Evelu	ide from cortificate', are not included in the list for a

Unit Batch type, and therefore will not be available to select.

If you are creating a unit certificate batch and have selected a unit the following page will be displayed prior to going to the learner selection section

Certification Wizard		
Selected Qualification: Level 1 Skills (Change)		
Selected Unit: Test 1 (Change)		
	Previous	Next

Figure 10-4 : Confirmation of qualification and unit selections page

Button	Purpose
(Change)	Return to the qualification selection page
(Change)	Return to the unit selection
Previous	Return to the certification type selection page
Next	Confirm use of this qualification for this batch and continue to the next page

#### Learner Selection

Once you have clicked next from the qualification (and unit if you are creating a unit certification batch) selection, you will be given several options for how you would like to select the learners who are to be certified in this batch.

Certification Wizard		
Select Learners By		
Centre		
Osite		
Reg Group		
DLearner Number		
	Previous	Next

#### Figure 10-5 : Page to choose how learners will be selected

Option	Description
Centre	Select learners by centre
Site	Select learners by site
Reg. Group	Select learners by registration group
Learner Number	Select individual learners by learner number
Button	Purpose
Previous	Return to the qualification (and unit if you are creating a unit certification batch) confirmation page
Next	Confirm the selection and continue to the next page

If you clicked next you will now be taken to the learner selection page, this page will be one of the following and varies depending on your selection

Centre	Certification Wizard
	Filter Learners
	Date Filter Denistrations with grader entered between specified dater
	Requested Only
	Centres   All Centres
	Batch Option One Batch
	One Batch Per Site
	Show Learner Selection Screen 🕤
	Previous Next
Site	Certification Wizard
	Filter Learners
	Date Filter Registrations with grades entered between specified dates
	Requested Only
	Centre * - Please check the Centre / Site / Qualification Offered status
	Batch Option  One Batch Option One Batch Per Site
	Site All Sites 💌
	Show Learner Selection Screen 🔒
	Previous Next
Reg. Group	Certification Wizard
Oroup	Filter Learners
	Date Filter Consistent of the second
	Requested Only
	Reg Group Code
	Event Number All
	Show Learner Selection Screen 🔒
	Previous Next

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Learner Number	Certification Wizard
	Filter Learners
	Date Filter Registrations with grades entered between specified dates
	Requested Only
	Learner Number Add
	Learners to Include
	Show Learner Selection Screen 🗿
	Previous Next

### 1.3.1.1 Date Filter

The date filter is used to optionally limit which registrations are certified in this batch, this can be one of ...

Date Filter	Purpose	Validation
All	Include all registrations in this batch	
Registrations with grades entered between specified dates	Include registrations in this batch that fall within a specified date range. If this option is selected 2 additional date entry fields ( From and To Date ) will become available	If this value is selected then both date fields must be valid date values

### 1.3.1.2 Batch Option

If learner selection type is either centre or site then you will have the option to specify how the batch will be created

Option	Purpose
One Batch	A single batch will be created
One Batch Per Site	A batch will be created for each site that would be included in this batch

### 1.3.1.3 Filter Learners by Centre

- 1. Enter the date filter you require
- 2. Select the centre you require or 'All Centres'
- 3. Select the batch option for this batch
- 4. Optionally: checked the "Show Learner Selection Screen" checkbox
- 5. Click next to go to the learner selection page

#### 1.3.1.4 Filter Learners by Site

- 1. Enter the date filter you require
- 2. Select the centre you require or 'All Centres'
- 3. Select the batch option you require
- 4. Select the site you require or 'All Sites'

- 5. Optionally: checked the "Show Learner Selection Screen" checkbox
- 6. Click next to go to the learner selection page

### 1.3.1.5 Filter Learners by Registration Group Code

- 1. Enter the date filter you require
- 2. Enter the registration group code
- 3. Optionally: checked the "Show Learner Selection Screen" checkbox
- 4. Click next to go to the learner selection page

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### 1.3.1.6 Filter Learners by Learner Number

- 1. Enter the date filter required
- 2. Enter the learner number you wish to create the batch for
- 3. Click the add button to add it to the list of learners
- 4. Repeat stages 2 and 3 until all required learners have had their codes added to the list
- 5. Optionally: checked the "Show Learner Selection Screen" checkbox
- 6. Click next to go to the learner selection page

**Note:** any erroneous entries in the learner list can be removed by clicking on the entry you wish to remove and clicking the remove button

Once you have completed one of the steps and have checked the "Show Learner Selection Screen" checkbox above you will be shown a page similar to the one shown below. Here you will see a list of the learners which will be included on this batch. You can refine this list by selecting/de-selecting the check box on the left hand side of the grid in the 'print' column.

Certific	ation Wiz	ard													
Select Lea	rners To Pri	nt													
Print	FirstName	LastName	e Grade	Qualification	Uni	tCode	Unit	Cer	itre	Site		Requ	uested	-	*
ø	Barry	Bishop	Pass	Testing Qualification 1 : NQF - {1 pathwa 2 groups, Pass/Fall - Generated by 'auto' testing scripts)	iy. Auto	TestUnit001	Test Unit 1	Auto Cent One (Ger by 'a testi scrip	) Test tre nerated ng nts)	Auto One One (Gen by 'a testir scrip	Test Site erated uto' 1g ts)				
				Testing Qualification 1 :											*
Errors															*
The followin	ng certificates v	will not be gene	erated, unles:	s stated otherwis	e in the re	ason column									
Reason	Certific	ateType P	- IrstName	LastName	Grade	Qualifica	tion	Unit	Centr	e	Site		Requested	1	
Error: - Ur Test Unit has an alternativ achievem and is therefore	nit 1' e ent Unit	,	Mary	Sheen	Pass	Testing Qualificatio NQF- (1 pathway, 2 groups, Pass/Fail+	n1:	Test Unit 1	Auto T Centre One (Gener by 'aut	est ated oʻ	Auto Te One Site One (Genera by 'auto	st e ited			•
													Previous	Nex	æ

#### Figure 10-6 : Learner selection page

#### Generating a Unit/Partial Certificate Batch – Select Learners to print

For units marked as 'Exclude from certificate' then these learners units will not be displayed in the grid.

Button	Purpose
Previous	Return to the Filter Learners page
Next	Confirm the selection and continue to the next page

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#### 1.3.1.7

If you have not checked the "Show Learner Selection Screen" checkbox then you will be presented with the Batch summary screen below.

### **Batch Summary**

Once all the above steps have been carried out you will be presented with the following page

Certification	Wizard					
Summary						
Qualification Split Batch By Site Centre Site Certificates	Level 1 Skills No Any Any 1					
				Previous	Generate Certific	ates

Figure 10-7 : Batch summary page

Button	Purpose
Previous	Return to the Filter Learners page
Generate Certificates	Confirm that the information entered is correct and create the certification batch

The template to use will depend on how the unit certificates are generated:

- Qualification & Unit Use the unit template as defined against the qualification
- Unit Use the new template field against the unit.

When a learner has attempted the same unit on multiple qualifications then only one unit certificate should be generated using the best grade for that unit.

Once the batch has been created you will be taken back to the Batch Listing page where you will see your new batch.

### 10.3 Viewing a Batch

To view a batch click on the  $\bigcirc$  icon on the batch listing page as described in section 10.1 you will then be shown a page similar to the one below

Batch Details		_							
Back View Batch	View Transcript View Summar	a							
Qualification/Unit Certification Type Filters Applied	Level 1 Selfs Ful Batch Per Ster, False, Centre, Any 1	Number of Certificates De: AnyTranscript Printed	Printed On Printed By	Not Yet Printed					
1000	New Batch Grown	**							
Certificates									
Printed Number	First Name	Last Name	Template	Centre	Site	Qualification	Unit	CertificateType	

#### Figure 10-8 : Batch details page

Button	Purpose
Back	Return to the Batch Listing page
View Batch	View the certificates in the batch
View Batch Errors	View any errors that this batch encountered while being created
View Transcript	View the list of units for the certificate. Only available for a full certificate.
View Summary	View a summary of the batch

### 10.4 Printing a Batch

To print a batch click on the sicon on the batch listing page as described in section 10.1 you will then be shown an in-page popup similar to the one below

Certificate Batch Print Preview		
Printed Batch, Close Close		
14 4 1 of 2 ? 🕨 🕅 🖨		
TAN CHEE		
Figure 10-9	: In-page popup	to view certificates in a bate



Button	Purpose
14	Move to first page (only enabled if more than one page in report)
4	Move to previous page (only enabled if more than one page in report)
1 of 1	Move to specified page (only enabled if more than one page in report)
▶	Move to next page (only enabled if more than one page in report)
⊳∎ I	Move to last page (only enabled if more than one page in report)
<b>a</b>	Print the certificate batch
Printed Batch, Close	Mark the batch as printed and close the in-page popup; the status of the batch will be changed and will no longer appear on the Batch List (unless you un-tick Hide Printed Batches). You may not re-print a batch that is marked as complete.
Close	Close the in-page popup

**Note:** marking the batch as printed will require a confirmation that it has indeed been correctly printed

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### 10.5 Print Certificate Transcripts

To print a transcript batch, click on the  $\widehat{1}$  icon on the batch listing page as described in section 10.1 you will then be shown an in-page popup similar to the one below

4 1	of 2 ?	Þ ÞI	ψ		Find   Next	<b>R</b> . ()	
			Dav has been a	<b>Ye Tri</b> warded the fo	p:-	(m)	

Figure 10-10 : In-page popup to view certificate transcript batch

Button	Purpose
14	Move to first page (only enabled if more than one page in report)
4	Move to previous page (only enabled if more than one page in report)
1 of 1	Move to specified page (only enabled if more than one page in report)
▶	Move to next page (only enabled if more than one page in report)
	Move to last page (only enabled if more than one page in report)
3	Print the certificate transcript batch
Mark as Printed and Close	Mark the batch as printed and close the in-page popup; the Transcript Printed checkbox will be selected.
Close	Close the in-page popup

#### 10.6 Print Certificate Batch Summary

To print a certificate batch summary, click on the silence is icon on the batch listing page as described in section 10.1 you will then be shown an in-page popup similar to the one below

14 4 1	of 1 0 01	4	Find	Next 🔍 🗸 🗸	٩
atch Numl	e batch : ber: 290	Summary			
ast Modified By	y: dan			0	
ast Modified By Certificate Number	y: dan First Name	Last Name	Learner Code	Certificate Summary	Grade
ast Modified By Certificate Number 5215	y: dan First Name Bea	Last Name Grale	Learner Code	Certificate Summary	Grade
st Modified By Certificate Number 5215 5215	y: dan First Name Bea Bea	Last Name Grale Grale	Learner Code 1676 1676	Certificate Summary	Grade
st Modified By Certificate Number 5215 5215 5215	y: dan First Name Bea Bea Bea	Last Name Grale Grale Grale	Learner Code 1676 1676 1676	Certificate Summary	Grade
Ast Modified By Certificate Number 5215 5215 5215 5215 5215	y: dan First Name Bea Bea Bea Bea Bea	Grale Grale Grale Grale Grale	Learner Code 1676 1676 1676 1676	Certificate Summary	Grade

.

Figure 10-11 : In-page popup to view certificates in a batch

Button	Purpose
14	Move to first page (only enabled if more than one page in report)
4	Move to previous page (only enabled if more than one page in report)
1 of 1	Move to specified page (only enabled if more than one page in report)
	Move to next page (only enabled if more than one page in report)
li ∢	Move to last page (only enabled if more than one page in report)
3	Print the certificate batch summary
x	Close the in-page popup

### 10.7 Advanced Secure Printing

× 💷

Advanced Secure specialise in the provision of secure certificates and certificate printing solutions. Their system, Digital Certificates, is offered as an extension to our own awarding body management system, Parnassus. Digital Certificates provides chip & PIN security so



that only authorised staff can print certificates as well as encrypted certificate numbers, detailed audit trail, encrypted graphics images such as signatures and multi-layer dynamic certificate templates.

Batch	es											
New Ba	tch Wi	tard										
Filters												
Centre A	li -					▼ Site	All					
Shown	ny bati	thes o	inly 🕅	Hide	successfully exported batch	s Bato	hes to Display 10					
Batch Lis	st.											
Export	M	lark se	electer	l as ex	ported OK Mark selecte	d as not exp	ported					
0	Select Acros	t All ss all	pag	es)	Status	Batch #	Transcript Printed	Date Created	Batch Type	Qualification Title	Batch Request	Centre
0 0	-	Ð	s	ø	Not Sent	1395		26/09/2018 13:10:06	Full	Level 1 Skills		All
0	-	Ť	s	ø	Not Sent	1394		12/09/2018 13:14:43	Full - Reprint	Testing Qualification 1 : NQF - (1 pathway, 2 groups, Pass/Fail - Generated by 'auto' testing scripts)		All
0 0	-	Ť	s	đ	Not Sent	1393		22/08/2018 14:23:19	Full	Testing Qualification 1 : NQF - (1 pathway, 2 groups, Pass/Fail - Generated by 'auto' testing scripts)		All
0		T	S	ø	Sent to Advanced Secure	1392		20/06/2018 17:26:19	Full	Testing Qualification 1 : NQF - (1 pathway, 2 groups, Pass/Fall - Generated by 'auto' testing scripts)		All

### Figure 10-12 : Export to Advanced Secure for printing

Button	Purpose
Export	It is possible to export multiple certificate batches to a single Advance Secure File. In the Certification screen, there is a tickbox alongside each un-printed batch. You can tick multiple batches (or just one) and then click Export. The export directory is configurable.
Mark selected as exported OK	In the Certification screen, there is a tickbox alongside each un- printed batch. You can tick multiple batches (or just one) and then click Mark selected as exported OK.
Mark selected as not exported	In the Certification screen, there is a tickbox alongside each un- printed batch. You can tick multiple batches (or just one) and then click Mark selected as not exported.

### 10.8 Certificate Validator

On the login screen there is the option to allow certificates to be checked - *please contact GA if* you want this button to be visible

Fassword	
Remember Username	
Forgot	Log i
Password?	

The certificate date entered is checked to find a match against the snapshotted Certificate Achieved, Last Assessment Passed On, Certificate Created, or Date Printed dates.



Learner Certificate Validator

First Name*	
Last Name*	
Date of Birth*	
Certificate Numbe <mark>r*</mark>	
Certificate Date*	
	2
l'm not a robot	reCAPTCH2

Valid certificate details shows the message VALID and the Qualification title:

Certificate Status: VALID

Qualification Title: Testing Qualification 1:NQF - (1 pathway, 2 groups, Pass/Fail - Generated by 'auto' testing scripts)

Invalid certificate details entered show message INVALID:

Certificate Status: INVALID - a certificate matching the criteria could not be found

You can warn users that the certificate shown in the validator may not look like the certificate the user is validating – this is only needed where the original certificate template has been changed since the certificate was issued.

The feature is turned off by default, please contact GA is you would like this feature enabled. The inclusion of Captcha is also possible if required. NB This feature only works with certificates printed from Parnassus and not certificates exported

for printing.

## 11. Reporting

Please see separate Reporting User Guide



## 12. Contacts

### 12.1 Contacts - General

Parnassus has a single master list of Contacts. Contacts can be associated with a Centre and a Site. Centre / Site association is done via role.

The Contact Home screen is shown below. All Contacts in Parnassus will be shown on this screen. If you need to see a filtered or reduced list use the Search and Advanced filter.

When you are viewing Centre or Site contacts this initial page will show the contacts for the Centre / Site.

Workflows	Centres Venu	es Learners Qualification +	Certificates	Reporting Contacts GA A	dmin Admin	Events +
Contact Search				Search Sort By Nat	Advanced Filters	Actions
results found						Add New Contact
335 - Jack Forbes EQA	Active	336 - Gordon Harrison Example Centre For User Guide gordon@gordonassociates.co.uk 7771860895 Main Contact	Active	333 - timmy jenkins Avril New site 1 Principal	Active	Your Recent Activity Contact: Gordon Harrison (386) Pin Ster, Audo SF Jour San One: (993.001) Pin Centre, Audo Test Centre Four Sannerated by Jauro's testing angles) (1993) Pin Ster, Example Centre For User Guide - Size 02 (1277.002) Pin Centre: Example Centre For User Guide (1277) Pin Pinned Activities Ster, Example Centre for User Guide - Size 01
334 - timmy jenkins	Active					(1277.001) Unpin
Associated with multiple sites	0					

#### 12.2 Contact Search

Use Search and Advanced Filter to find /view specific contacts as you need. The Search works on Contact name.

The Advanced Search screen is shown below and enables you to search based on Centre, Site and Job role. The Centre and Site dropdowns default to the current Centre/Site when searching on the Centre/Site screen.

Choose filter criteria		×
Roles associated with		
All		*
Job Role		
All		
Centre		
All		*
Site		
All		*
Qualification		
All		-
	Cancel Clear Filters	Apply Filters

### 12.3 Contact Details – View / Add / Edit / Delete Cntact

Click on the Contact Card to View / edit the contact details as below.

Gordon Harrison Contact Home   Contact Notes			Actions
dit Contact			Save Add New Address
ontactCode	Title	First Name	Add Job Role
336	Mr ····································	Gordon	Close
liddle Name (s)	Last Name	Status	Delete
	Harrison	Active -	Your Recent Activity
ate of Birth	Email	Telephone	Site: Example Centre for User Guide - Site 01
	gordon@gordonassociates.co.uk	7771860895	(1277.001) Pin Contact: Conden Harrison (136) Pin
lobile Phone			Site: Auto Test Four Site One (9933.001) Pin Centre: Auto Test Centre Four (Generated by Juuto Testing scripts) (9993) Pin Site: Example Centre for User Guide – Site 02 (1277:002 Pin Pinned Activities
ordon Associates, Suite G1, Mont	pellier House, Montpeller Drive, Cheltenham, Cheltenham, GLOS	UNITED KINGDOM, GL50 1TY	Site: Example Centre for User Guide - Site 01
ddress2 for GH, UNITED KINGDO	м		(1277,001) Unpin
ob Roles			
jalı finle	Seeus Centre		

Information that can be recorded about a contact is summarised below;

Field Name	Purpose	Validation	
Title	Title (salutation) of the	Mandatory or Optional. This can be	
	contact	for your installation of Parnassus	
First Name	First name of the contact	Mandatory	
Middle Neme (a)	Middle names of the	Ontional	
Midule Marile (S)		Optional	
	contact		
Last Name	Last name of the contact	Mandatory	
Status	Status of the contact	Mandatory: must be one of the	
	See below.	selectable values	
Phone	The contacts phone	Optional, however it is highly	
	number	recommended that this value be	
		populated.	
Email	The contacts email address	Optional, however it is highly	
		recommended that this value be	
		populated. (No Validation)	

#### Contact Actions - Add New Address

You can record multiple addresses for a Contact. These are displayed as per the screen shot below. Click the address to edit it. There is the option to either Save or Delete the address when editing it.

Gordon Harrison					Actions
Contact Home   Contact Hotes					Save
Edit Contact					Add New Address
ContactCode	Title		First Name		Add job Role
336	Mr		* Gordon		Close
Middle Name (s)	Last Name		Status		Delete
	Harrison		Active	*	Your Recent Activity
Date of Birth	Email		Telephone		Site: Example Centre for User Guide - Site (1
	gordon@gordo	nassociates.co.uk	7771860895		(1277.001) Pin
Mobile Phone					Site: Auto Test Four Site One (9933.001) Pin Centre: Auto Test Centre Four (Generated b 'auto' testing scripts) (9953) Pin Site: Example Centre for User Guide - Site 0 (1277.002) Pin
aordon Associates, Suite G1, Montpu Address2 for GH, UNITED KINGDOM	ellier Hause, Montpelier Drive, Ch	eltenham, Cheitenham, GL	OS, UNITED KINGDOM, GL50 1TY		Pinned Activities Site: Example Centre for User Guide - Site 0 (1277.001) Unpin
lob Roles					
job Role	Status	Centre			

### **Contact Actions - Add Job Role**

If you want to create job roles for a contact use the Add Job Role option. This screen also lets you assign centre and site. When you do this from the Centre / Site screens the Centre / Site value default to the current Centre / Site.

fordon Harrison						Actions	
ontact Home   Lontact Notes						Save	
reate Contact Job Role						Cancel	
Contact						Your Recent Activity	
Gordon Harrison (336)					Site: Example Centre for Ution Guide - Site 01 (1277.001) Pin Contact: Gordon Harrison (236) Pin		
issociate rale with Job Role							
Centre	+ Main Contact +			Stee Auto Test Four Site One (9993.001) Pin Centre: Auto Test Centre Four (Generated b	01] Pin		
Approved From Approved To				'auto' testing scripts) (9993) Pin Stee Example Centre for User Guide - Site 0.	Site 07		
						(1277.002) Pin	and the
Ientre						Pinned Activities	
9993 Auto Test Centre Four (Generated by 'auto' test	ng scripts)				. •	Ste: Example Centre for User Guide (1277.0011 Ungin	Site 01

The table below summaries the main Role information;

Field Name	Purpose	Validation
Role Type	The type of the role, this will affect which other options are available	Mandatory: must be one of the selectable values
Role	The role this contact performs	Mandatory: must be one of the selectable values
Centre (Only present if Role Type = Site)	A list of Centres to which this contact is allocated	

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Site	A list of sites to which this contact is	Mandatory: must be
(Only present if	allocated	one of the selectable
Role Type = Site)		values
Qualification	A list of qualifications which are allocated	Mandatory: must be
(Only present if	to the centre via the 'Qualifications' tab	one of the selectable
Role Type =	on the site page.	values
Qualification)		

### **Contact Actions – Delete Contact**

When you delete a Contact there is a confirmation as below. When you delete a contact all the role and associated information is deleted.

				Actions
Contact Home   Contact Notes				Save
Edit Contact				Add New Address
ContactCode	Title		First Name	Add Job Role
337	Not Supplied	*	Gordon	Close
Middle Name (s)	Last Name		Status	Delete
	Harrison		Active	- Your Recent Activity
Date of Birth	Email		Telephone	Contact: Gordon Harrison (337) Pin
	gordon@gordor	Delete the selected Contact	? *	Site: Example Centre for User Guide - Site 01
Mobile Phone		A Are you sure you want to delete the selected Contact?		
			Yes Cancel	Centre: Auto Test Four Site One (5950001) Prin Centre: Auto Test Centre Four (Generated by Jauto' testing scriptol (9993) Pin
Addresses				Pinned Activities
Gordon Associates, Suite G1, Montpellie	House, Montpelier Drive, Che	ltenham, Cheltenham, GLOS, U	NITED KINGDOM, GL50 1TY	Site: Example Centre for User Guide - Site 01 (1277.801) Unpin
Job Roles				
Joh Inde	Status	Centre 1993 Auto Test Centre	Even (Gamerstad by Soley factory springer)	

## 13. Facilitators

When you have clicked on the Events  $\rightarrow$  Facilitators option on the main menu you will be presented with the following page.

#### 13.1 Facilitators List

Screen to track instructors, examiners, assessors etc. The list of facilitators is an overall global list, i.e. not linked to centres – but they can be linked to site qualifications.

cilitator Search								Actions
how 25 - entri	es					Sea	rch:	Add Facilitator
Registry Number	Title	First Name	Last Name	<ul> <li>Level</li> </ul>	I Status	Renewal Date	Registration Type	
64	Mr	EV	Contact	Internal Verifier	Current	08/09/2022	Other	Your Recent Activity
57	Miss	Eve	Ev	Assessor Only	Current	27/04/2026	First Aid at Work	Contact: Hannah (466) Pin
60	Mr	Jonh	Faciitator	Instructor	Current	31/05/2021	Other	Event: One unit event (235) Pin

### Figure 13-1 : Facilitators

	Button	Purpose		
G	ordon	Associ	ates	
Suite (	G1, Montpellier House, M	ontpellier Drive, Cheltenham,	Gloucestershire GL50 1TY	01242 529820

Add Facilitator	Selects facilitator creation popup
Search:	Search for a facilitator

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### 13.2 Add New Facilitator Details

Clicking on the 'Add Facilitator' button will take you to the popup screen as shown below.

Add Facilitator			×
Contact Choose contact			•
Level		Facilitator Renewal Date*	Registration Expiry Date*
Assessor Only	*	i	<b></b>
Registration Type		Data Protection	
First Aid at Work			
Status			
In Processing	*		
			Save Cancel

Figure 13-2 : Add Facilitator

The following fields are used to define a new Facilitator.

Field Name	Purpose	Validation
Contact	Dropdown list of contacts available to be added as a facilitator	Mandatory from list
Level	Level of trainer allocated to the facilitator.	Mandatory: must be one of the selectable values
Facilitator Renewal Date	Date for renewal of the facilitator.	Optional, must be a valid date value.
Registration Expiry Date	The date after which it will not be possible to select the facilitator on the Event Registration screen. See section 0	Mandatory, must be a valid date value.
Registration Type	The type of the registration.	Mandatory: must be one of the selectable values
Data Protection	Whether data can be shared.	Optional
Status	Overall facilitator status - See section 0	Mandatory: must be one of the selectable values

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Buttons available on this page

Button	Purpose
Change Status	Opens the list of available facilitator status types and allows it to be changed.
Delete Facilitator	Delete the facilitator
	Display the Audit History Screen.

#### 13.3 Facilitator Details

Clicking on a facilitator in the Facilitators list will take you to the popup Facilitator Home screen as shown below.

elitators Search > Facilitator				Actions
Facilitator : Hannah Newton Fadiltator Home   Qualifications	Facilitator Notes			Change Status Delete Facilitator
acilitator Details 🥒			Status: Current	Your Recent Activity
logicity Number 59 Aggistration Explry Date 36/04/2021	Level Asservan Only Data Protection No	Facilitator Renoval Data 28/04/2021	Registration Type First Aict at Work	Secificator: Hanceli Newton Pitt Bacilitator: Cris Fin Event: AutofeitUsent011 (198) Pin Pvent: Qualitationi - ovent (233) Pin Contact: Hannah Newton (466) Pin
ontact Details 🥖				
nte Not Supplied	First Name Hannah	Middle Names Newman	Last Name Newton	
os (ot Supplied	Contact Code 466	Phone Not Supplied	Noble Not Supplied	
nal Lat Supplied				
\ddresses				

Figure 13-3 : Facilitator Home

The following fields are used to define a new facilitator. Clicking on the symbol allows editing of the fields.

#### **Facilitator Details**

Field Name	Purpose	Validation
Status	Overall facilitator status - See section 0	Mandatory: must be one of the selectable values
Registry Number	Unique identifier for the facilitator.	Read Only
Contact	Dropdown list of contacts available to be added as a facilitator	Mandatory from list
Level	Level of trainer allocated to the facilitator.	Mandatory: must be one of the selectable values
Facilitator Renewal Date	Date for renewal of the facilitator.	Optional, must be a valid date value.
Registration Type	The type of the registration.	Mandatory: must be one of the selectable values
Registration Expiry Date	The date after which it will not be possible to select the Facilitator on the Event Registration screen. See section 0	Mandatory, must be a valid date value.

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Data Protection	Whether data can be shared.	Optional
		•

Contact Details (editing these will take you to the contact page for this facilitator)

Field Name	Purpose	Validation
Title	Facilitator title	Mandatory: must be one of the selectable values
First Name	Facilitator first name	Mandatory
Middle Names	Facilitator middle names	Optional
Last Name	Facilitator last name	Optional
DOB	Facilitator Date of Birth	Optional
Contact Code	Facilitator contact code	Read Only
Phone	Facilitator Phone number	Optional
Email	Facilitator Email address	Optional
Mobile	Facilitator Mobile Phone number	Optional
Addresses	Facilitator address details	Optional

#### **Facilitator Status**

The following statuses will be available for a Facilitator:

Status	Can add Facilitator to Event
In Processing	No
Current	Yes
Non Current	No
Suspended	No
Retired	No
In-Training	No
Deceased	No

#### **Facilitator Qualifications Tab**

This tab shows a list of the Facilitator qualifications.

and the second second second						PALADORS
Facilitator : Hannah Ne Facilitator Home   Quali	ewton Nations    Facilitator Notes					Add Qualification
Facilitators Qualificatio	ons				Search	Your Recent Activity Contact Paronan Newton (411) Pin Contact Paronan (450) Pin
Qualification Code	* Qualification Title	Site Code	5 Site Name	Status	Approval Date	Fecilitator Francis Kewtor Pin Pecilitator Din Par
TPS 5167	775.5167			Approved	28/04/2021	Exerc Autoresteender Cost Par
Showing 1 to 1 of 1 entries					Precous	Nest

#### Buttons available on this page

Button	Purpose
Add Qualification	Add a qualification for the Facilitator

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#### Facilitators now need to be approved against the qualification for each site running an event. The first step is to choose the centre as below

Add Facilitator Qual	×
Centre	
Please Select	· · · · · · · · · · · · · · · · · · ·
	Save Cancel

#### Figure 13-4 : Add Facilitator Qualification popup

Next all of the fields required to assign the qualification to the Facilitator are shown:

Add Facilitator Qual				×
Centre				
1442.Excellence Centre				-
Site				
1442.001. Site 1				
Qualification				
AUTOTESTQUAL1 Testing Qualification 1 : NQF - (1 pathway, 2	groups, Pass/Fall - Gener	ated by 'auto' testir	ng scripts)	-
Status	Approval Date*			
Approved -	30/11/2021	iii		
			Save Ca	incel

#### The following fields are used to define the Facilitator's qualification.

Field Name	Purpose	Validation
Centre	The centre that is running the event	Mandatory
Site	The Site where the event is held	Mandatory
Qualification	The Qualification for which approval is to be added.	Mandatory: must be one of the selectable values
Status	Facilitator Status with respect to a specific site and qualification.	Mandatory: must be one of the selectable values
Approval Date	Date the Facilitator was approved for the site qualification.	Mandatory, must be a valid date value.

#### Buttons available on this page

Button Purpose

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Save	Save and add the record with the data entered and return to the Facilitator Qualifications Tab
Cancel	Cancels the record and return to the Facilitator Qualifications Tab.

#### Facilitator Notes Tab

See Section 18.



#### 14. EV Management and EV User Set up

In the Admin menu in the EV management screen you can assign EV or EQA users to qualifications, units & sites and also edit existing relationships.

The EV user must have a contact record set up with the EV role as shown in section 14.1 below.

Centres	Venues	Learners	Qualification +	Certificates 👻	Reporting	Contacts	Admin 👻	Events 👻	Documents
Sele	α						User Mar Custome Countries EV Manag	nager r Settings Ma s and Regions gement	nager :
ay the details in this area					Documer Regulato Framewo	nt Categories rs orks			

#### 14.1 EV User Set up

#### Create a new contact

EV Contact	Actions		
Contact Home   Contact Notes			Save
Edit Contact			Add New Address
ContactCode	Title	First Name	Add job Role
1005	Mr	EV	Close
Middle Name (s)	Last Name Contact	Status	Deiete
Date of Birth	Email	Telephane	Your Recent Activity Contact: EV Contact (1005) Pm Centrel: Test1 (102) Pin
Mobile Phone			- Site: GA Test Site (101.001) Pin Centre: GA Test Centre (5062) Pin
This contact currently has no job	Roles.		

### Save and add new role of EV after first selecting Associate role with Awarding Organisation), then save the contact

EV Contact	Actions	
Contact Home   Contact Notes		Save
Create Contact Job Role		Cancel
Contact		Your Recent Activity
EV Contact (1005)		Contact: EV Contact (1005) Pin
Associate role with	job Role	Centre: Test1 (102) Pin Site: GA Test Site (101.001) Pin
Awarding Organisation	~ EV	Centre: GA Test Centre (5062) Pin
Status	Approved From	
Active	×] [	
	Approved To	

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#### Add New Parnassus User with the EV Role

User N	lana	ger
--------	------	-----

User Name:	EV User	Created:	24/05/2021
Locked Out:	No	Last Activity	24/05/2021
Enabled:	Yes	Last Login:	24/05/2021
Dnline	True		
Comment:			
Roles:	Admin BypassCourseValidation Centres CentreServiceLayer CentreUserManager Examiner ExamsDowerUser ExamsUser Finance STDUser 0.060evel/sec	_	
	QAUser	Associated Contact:	None
	Teacher	Associated Centre:	None
Associated Sites		A.	

#### Assign the contact to the EV User

Users Roles Bulk Up	load			
User Name	EV User	Associated Centre	None	¥
Email	test@gordonassociates.co.uk	Associated Contact	467 - EV Contact	
			None	
			463 - Eve Ev	
			464 - Chris Young	
	6		465 - Jonh Faciltator	
Reset Password To		Associated Sites	466 - Hannah	
			467 - EV Contact	
				*
			Please select a centre in order to select associated sites. Admin	

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#### 15. Assign sites and qualifications to the EV

#### 15.1 EV Manager

There are three ways EV's can be assigned depending on how the AO works. The availability of this functionality needs to be turned on by GA – please discuss your requirement with GA

#### 1. EV Qualification and Site

You can approve the EV for Qualification(s) and associate the EV to Sites. This allows EV's to approve achievement for <u>all</u> qualifications they are approved for at <u>all</u> the sites they are associated with. This is the existing functionality pre Parnassus 5.4 release. The screen will show two tabs Qualifications and Sites:

#### Viewing, adding and editing EV Links to qualifications and sites

<i>_///</i> ^				
Qualification	nager Paul EQA V	ielect	Bulk	Manage
	CentreCode	Site	Created	
×	1293	(1293.001)Main Site	16/06/2021 08:49:45	
×	1293	(1293.002)Second site	16/06/2021 08:49:56	
×	1318	(1318.001)Cheltenham Site	16/06/2021 08:50:13	

To add an association with a site qualification for an EV user, first select the EV user on the drop down menu

Then using the Qualifications tab you can click on the

Add Qualification to EV

You will see a pop up box where you can select the qualification to be associated with the EV.

	Eve Ev	
alification	Select Qualification	•

The information on the qualification(s) that the selected EV is associated with is displayed in the Qualifications tab.



Qualifications Site Qualifications Offered Site Add Qualification to EV	una	
Qualification Code	Qualification Title	Created
# AUTOTESTQUALI	Testing Qualification 1   NQF - (1 pathway, 2 proups, Pass/Fail - Generated by autol testing scripts)	30/05/2021 14-64:57

Adding a site follows the same steps as for a qualification and the pop up box is shown below NB you must also add at least one site

Add EV to Site		
EV	Avril Austin	
Study Centre	172: Centre 1b	~
Site	Select Site	٣

You can delete a qualification or site associated with an EV User by using the 🗱 button.



#### 2. EV Qualification and Qualification Offered

This method allows the EV to be approved for qualifications, then associated on a site-by-site basis where the EV will then be approved only <u>for the qualification offered</u> they are associated with (i.e. restricting approval at Site Qualification level). This is new functionality. Please contact us if you wish to use this functionality.

#### Viewing, adding and editing EV Links to site qualification offered

To add an association with a Site Qualification Offered first select the EV from the dropdown menu as below:

lifications Offered	
EV	
Search site and o	qualification

Then using the Qualifications tab you can click on the

Add Qualification to EV

In the pop up box select the qualification the EV is approved for.

Add	EV to Qualifica	ation				
EV		Eve Ev				
Qualifi	cation	Select Qualificatio	on	•		
					_	
				Cancel Add	•	
You o availa	an either able buttor	Add or Can	the add	lition of the E	√ to the qualifica	tion using the

On the Qualifications Offered tab click on the button.

You will see a pop up box where you can select the centre, site and qualification to which the EV should be associated.

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EV	Eve Ev	
Centre	Select Centre	×
Site	Please select a Centre	*
Qualification		v
Default EV for qualif site	cation at	
		_

You can either or Cancel the addition of the EV to the Site Qualification using the available buttons.

The list of site Qualifications Offered is updated:

EV Man	ager						
EV	Eve Ev	* Selier					a
Qualifications	Site Qualifications O	ffered) Site Unit					
	Search s	ite and qualification					
	Centre Code	Site Code	Site Name	Qualification Code	Qualification Title	Default For Site	Created
0	1042	1642,001	5ee 1	ADIORSIQUALT	Lessing Quelification $\tau$ -(NQL-() performs, 2 groups, Passilial - Generated by must resting scripts)		1011/202114/29:08



#### 3. EV approval at Unit and Site

This allows EV's to be approved for specific units at a site. If you wish to use this functionality please contact us.

#### Viewing, adding and editing EV Links to site units

EV Man	ager			
EV	Jane Davis	▼ Select		
This EV does not	have a user accoun	so cannot log in to the sy	ystem	
Qualifications	Site Qualification	ns Offered Site Unit		
Add Site Unit	to EV			
	Centre Code	ž	Site Code	Site Name
First select	t the EV.			

From the Site Unit tab you click on the Add Site Unit to EV button.

In the pop up select the Centre, Site and unit the EV is approved for. The EV can be made the Default EV for the unit at the site, which will be applied where more than one EV is approved for the unit at the site.

NB there is no need to first assign the EV to Qualifications and Site or Qualification Offered.

	Jane Davis	
Centre	1454:PR Test Centre	Ŧ
Site	1454.001:PR Test site 01	Ŧ
Unit	PRU3:Unit Three	
Default EV for uni	tat site 🗹	

You can either add or cancel the addition of the EV to the site unit using the available buttons.

The information on the site unit(s) that the selected EV is associated with is displayed in the Site Unit tab.

/ Ma	ana	ger						
		Jane Davis 🔻	Select					Bulk Mana
EV does	s not hi	ave a user account so cann	iot log in to the system					
ualificati	ions	Site Qualifications Offere	ed Site Unit					
Add Site	e Ünit t	o EV						
Add Site	e Unit t	o EV						
Add Site	e Unit ti	centre Code	Site Code	Site Name	Unit Code	Unit Title	Default for Site	Created
Add Site	e Unit ti	Centre Code	Site Code 1454.001	Site Name PR Test site 01	Unit Code PRU2	Unit Title Unit Two	Default for Site	Created 27/01/2022 13:27:44
Add Site	e Unit to	Centre Code 1454 1454	Site Code 1454.001 1454.001	Site Name PR Test site 01 PR Test site 01	Unit Code PRU2 PRU1	Unit Title Unit Two Unit One	Default for Site	Created 27/01/2022 13:27:44 27/01/2022 13:28:08

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You can delete the site unit associated with an EV User by using the 🗱 button. You can

make the EV the default EV for the unit by clicking the  $\red{all}$ 

#### Additional configuration required with Unit and Site :

On the u	nit > ach	nievemen	t tab, check	the 'Allow EV /	Allocation'	checkbox:
Add new	Unit					
Save Save	e and Close	Copy Unit	Close			
Status +	Active		" Unit Name *	Unit One		
Available From			Unit Code *	PRU1	Replaced By	
Review Date				Credit Based	2	
Regulatory	Registration	Achievement	Grading Integra	ation Dependent Items	Elements Equ	ivalent Units Planned Exemption:
Achieve	ment					
Default Asses	ssment Type 🔒	Externally As	sessed 💌	Apply this Type to a	III Pathways	Allow EV Allocation
Default Weigh	ht	1		Apply this Weight to	all Pathways	

A 'Unit DCS' tab is available on the Site screen. This shows the units on <u>all</u> the qualifications Offered at the site where the 'Allow EV Allocation' has been ticked. It shows the EV's that are approved for the units with the default EV showing first.

PR Test Centre (1454) PR Test site 01 (1454.00	1)		
Site Home   Contacts	Qualifications   Qualificatio	on Sets   Unit DCS   Site Not	es
Site Unit Direct Claim Show 10 + entries	n Status		Search:
Unit Code	Unit Title	DCS	♦ EV Assigned
Type to filter	Type to filter	Select values	Type to filter
PRU1	Unit One	None	Robert Green, Jane Davis
PRU2	Unit Two	None	Jane Davis, Robert Green
PRU3	Unit Three	Approved	

By clicking on the unit the user can edit the U	nit DCS:
Edit Unit Direct Claims Status	×
PRU1:Unit One	
None	*
Please Select	
Approved	
None	
Suspended	
Withdrawn	

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#### 15.2 Bulk Import of EV associations

You can use a spreadsheet to import your EV associations with sites and qualifications. Please note that doing this will remove all existing EV Sites and EV Qualifications and add only those that are in the spreadsheet.



k Manage

You will need to click on the **button** button to do this. Then a pop up screen will appear so you can choose the file you are using for the import.

a list and the list	a state to all a financial and the could be seen	and all collectors for france and for	all freedom and
dd only what	g this buik functionality will remi t is in the uploaded spreadsheet	ove all existing by pites and Qu	painications and
	and the second second second		
lease upload	an excel file		
Choose file	No file chosen		

Upload Bulk

You can either click the **button** button to import the file of EV associations or use the cancel button to cancel the upload.

If there are errors on the import file then these will be shown as below and file will not be processed until these are corrected in the file.

#### 16. Events

When you have clicked on the Events option on the main menu you will be presented with the following page.

#### 16.1 Events List

Do you track the events that your centres run for your qualifications? The Events screen allows a centre to submit an event request, optionally with their preferred facilitators (instructors, assessors etc). You can approve their request and they are allocated an event number.

You are able to define events of just specific units from a qualification (rather than the whole qualification); the events screen also shows which learners are on the event and the learners screen shows which events a learner has attended. This process involves a new event number at the unit registration level. Reg group code which was at qualification registration level is still available. You should decide if you are going to track events at the qualification or unit level and use the relevant code.

assus v5.5 l	User Guide				Page	230 of 263
Event Search	ntries			Show Live Ev	vents Only More Filters	Actions
Event Number	Event Title	Status	4 Site	Qualification Code	Qualification Title	Add Event
233	Qualification1 event	Approved	1442.001: Site 1	AUTOTESTQUAL1	Testing Qualification 1 : NQF	Your Recent Activity
108	AutoTestEvent001	Approved	9990.001: Auto Test One Site One (Generate	AUTOTESTQUAL1	Testing Qualification 1 : NQF	Event: Two Day Course Qualification 5 (234) I Event: Qualification 1 event (233) Pin Capter: TES 2455 (1445) Pin
Showing 1 to 2 of 2 e	entries				Previous 1 Next	Site: TFS2155 Site (1445.001) Pin
			Figure 16-1 : Even	ts		
Butt	on	Purpose	Э			

The Event Search allows the use of wildcards to increase the flexibility of searches.

Add Event

Selects Event creation popup



#### 16.2 Add New Event Details

Clicking on the 'Add Event' button will take you through the Event creation stages as shown below. Firstly by choosing the centre followed by the site and qualification.

Add Event	
lentre Plense Select	
Lienze Serect	
	Cancel

Add Event			×
Centre Excellence Centre			
Site			
1442.001:Site 1			×
Qualification			
AUTOTESTOLIAL 9 Testir	nd Qualification 9 · Same unit in mul	tiple arouns - (suspended for rea - Gen	erated by 'auto' testing scripts)
10101201001201038		nipio groups - (suspended for reg - cen	orated by date tosting scriptsy
Event Title			
Organiser		Start Date*	End Date*
None		•	
Max Registrations	No of Resources	Estimated Attendees	Purchase Order
Partner Event		Auto Register Units 🕄	
Ctatus			
Approved		*	
rippioved			
			Save Cancel

Figure 16-2 : Add Event

The following fields are used to define an Event.

Field Name	Purpose	Validation
Event Number	Unique identifier for the Event.	Read Only
Event Title	Description for the event	Optional
Status	Event Status	Mandatory: must be one of the selectable values
Centre	Centre for the Event.	Mandatory: must be one of the selectable values.

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Site	Site for the Event.	Mandatory: must be one of the selectable values
Qualification	Qualification associated with the Event.	Mandatory: must be one of the selectable values
Organiser	A contact in the Qualification Administrator Role for the Centre and Qualification which is associated with the event.	Optional
Start Date	Start Date of the event.	Mandatory, must be a valid date value.
End Date	End Date of the event.	Mandatory, must be a valid date value.
Max Registrations	Max number of Registrations for the event.	Optional
No. Of Resources	Number of Resource packs required for the event.	Optional
Est. No. Attendees	Estimate of the number of attendees for the event.	Optional
Purchase order	Purchase order number	Optional
Partner Event	Partner event number	Optional
Auto Register Units	If ticked this will register learners on the mandatory units of the qualification and optional units that are offered on the event – otherwise only mandatory units will be registered.	Optional
Status	The status of the course e.g. Approved	Mandatory

#### 16.3 Event Information

When the event is added the tab menus Facilitators, Units, Learners, EV's, Custom and Notes will be available for managing the event as below.

Events Search > Event				Actions
Qualification1 event Event Home   Facilitators	Units   Learners   EVs   Custom   Notes		4	Update Status
and a second				Create Certificates
Event Details 🧷			Status: Approved	Registration Upload
				Add Achievement
Event Number	Event Title			Delete Event
233	Qualification1 event			
Start Date	End Date	Organiser	Max Registrations	Your Recent Activity
24/11/2021	25/11/2021	Not Supplied	Not Supplied	Facilitator: EV Contact Pin
No of Resources	Est Num Attendees	Purchase Order	Partner Event	Event: Two Day Course Qualificat
Not Supplied	Not Supplied	Not Supplied	Not Supplied	Centre: TFS 2155 (1445) Pin
Auto Register Units ()	In Progress Registrations ()			Site: TFS2155 Site (1445.001) Pin
Yes	0			
Site And Qualification 🥒				
Centre		Site		
1442:Excellence Centre		1442.001;Site 1		
Qualification AUTOTESTQUAL1: Testing Qualif	ication 1 : NQF - (1 pathway, 2 groups, Pass/Fail -	Generated by 'auto' testing scripts)		

#### Actions on this page

Action	Purpose
Update Status	Change the status of the event – when cancelling an event you can choose to withdraw and/or delete 'In Progress' registrations without achievement – please contact us for the options available as this requires configuring.

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Create Certificates	Issue certificates for the event participants – this takes you to the Certificate Wizard where the event, centre and site details are prepopulated and you can optionally select the learners,
Registration Upload	This links to the registration file upload where the event, centre and site details are pre-populated in the pop up and also added to the rows in the registration file during upload. A registration file can then be selected in the normal way.
Add Achievement	This will open the quick grade entry page with the event detail filled in.
Delete Event	Deletes the event provided there are no registrations for it.
*	Display the Audit History Screen.

#### **Facilitators Tab**

The facilitator tab shows the list of facilitators who are assigned to the event as well as the option to add a facilitator.

Qualificat Event Home	ion1 event :   <b>Facilitators</b>   Unit			m   Notes						Add Facilitator
show 100	+ entries						Sea	arch:		Your Recent Activity
	Registry Number	Title	First Name	Last Name	Status	Renewal Date	0 Level	Is Lead		Event: AutoTestEvent001 (108) Pin Facilitator: EV Contact Pin
≡	64	Mr	EV	Contact	Current	08/09/2022	Internal Verifier	Yes		Event: Qualification1 event (233) Pin Centre: TES 2155 (1445) Pin
									1	-
howing 1 to	l of 1 entries							Previous 1	Next	

Clicking on the 'Add Facilitator' button will show a dropdown box containing the Facilitator's that can be assigned to the Event.

ents Search > Course	Actions
Two Day Course Qualification 5 Course Home   Facilitators   Units   Learners   EVs   Custom   Notes	Add Facilitator
	Your Recent Activity Facilitator: EV Contact Plin
Add Facilitator to Event	×
Facilitator	
Please select	
Please select	
64:EV Contact (Internal Verifier)	
1 Particular State	Cancel

#### Figure 16-3 : Add Facilitators Tab

The following fields are used to define the Facilitator's qualification.

Field Name	Purpose	Validation
Make Lead	When selected, will specify the new facilitator as the Lead Facilitator. Lead Facilitator is identified for printing on certificates.	Optional: First Facilitator defaults to Lead Facilitator.

#### Buttons available on this tab

**Button** 

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Purpose

$\equiv$	Clicking on this gives the option to delete or mark the facilitator as lead for this event
Add Facilitator	Add facilitators to the event

#### **Units Tab**

This Tab allows the user to select the Qualification units which will be covered at this event.

Events Search > Event				Actions
AutoTestEvent001 Event Home   Facilit	ators   <b>Units</b>   Learners	EVs   Custom   Notes		Set Event Units
Show 25 - entries			Search:	Your Recent Activity
UN	<ul> <li>Unit Code</li> </ul>	Unit Title	🔶 Unit Group	Event: Auto l'estevention (108) Pin     Facilitator: EV Contact Pin     Event: Two Days Course Outsiles F (2)
	AutoTestUnit003	Test Unit 3	Optional	Event: Two Day Course Qualification 5 (2. Event: Qualification1 event (233) Pin
	AutoTestUnit004	Test Unit 4	Optional	Centre: 1FS 2155 (1445) Pin
A/502/3800	AutoTestUnit001	Test Unit 1	Mandatory	
F/502/3801	AutoTestUnit002	Test Unit 2	Mandatory	

Figure 16-4 : Units Tab

Clicking on the 'Set Event Units' button will show a popup box containing the units that can be assigned to the Event. Units can be ticked (included) or unticked and excluded for the event.

Edit E	vent Units			×
0	Unit Code	UN	Unit Title	Unit Group
	AutoTestUnit001	A/502/3800	Test Unit 1	Mandatory
	AutoTestUnit002	F/502/3801	Test Unit 2	Mandatory
	AutoTestUnit003		Test Unit 3	Optional
	AutoTestUnit004		Test Unit 4	Optional
				Save Cancel

#### Buttons available on this tab

Button	Purpose
Save	Save the assigned event units
Cancel	Cancel changes to the event units used
Set Event Units	Opens the popup box to edit event units assigned

#### Learners Tab

Shows the learners who have been registered for the Event.



w	10 - entries				Search:
	Learner Code	First Name	🚊 Last Name	Registration Status	+ Registration Date
	Type to filter	Type to filter	Type to filter	Select values	
	140732	Marty	McFly	Withdrawn	22/05/2012
	141093	Mini	Small	Complete	18/05/2021

Figure 16-5 : Learners Tab

#### Available on this tab

Button/Link	Purpose
$\equiv$	Clicking on this gives the option to set withdraw status or remove the withdraw on the learner registration for this event.
Learner number link	Clicking on this will open a pop up for the learner registration

#### EV's Tab

Shows the EV's who are approved for the qualification at the Centre offered by the Event.

Qualificat Event Home	Qualification1 event Event Home   Facilitators   Units   Learners   EVs   Custom   Notes									
Show 100	- entries		Search:							
Title	* First Name	Last Name								
Miss	Eve	Ev								
Showing 1 to	1 of 1 entries		Previous 1 Next							

lowing i to i of i entries

Figure 16-6 : EV's Tab

#### Available on this tab

Dutten/Link	Dumene
Bullon/Link	Purpose
Search:	Text box to search for an EV

#### **Custom Tab**

Tab for displaying custom data fields for the Event – please contact us if you wish to use these.

Qualification1 event			
Event Home   Facilitators   Units	Learners   EVs   <b>Custorn</b>   Notes		
Event Custom Fields 🥒			
Custom1	Custom2	Custom3	Custom4
-	-	+	-
Custom5	Custom6	Custom7	CustomB
-			
Custom9	Custom10		
-			

Figure 16-7 : Custom Tab

Available on this tab

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Button/Link	Purpose	
Search:	Text box to search for an E	V

#### Notes Tab

See Section 18.

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#### 17. PLR Link – Achievement Upload and ULN Verification

#### 17.1 Introduction

Parnassus has an optional module that enables integration with Personal Learner Record (PLR).

With this module you can;

- verify ULN's against the PLR.
- submit learner achievement (qualification and unit) to the PLR.

Information is sent to the PLR by one of 2 methods;

- web service.
- manual file upload.

The general processes in Parnassus are the same for both methods, the only difference is the method of data submission to the PLR.

<i>Note:</i> You can exclude results be on the relevant qualification.	eing sent per qualification	by selecting the Exclude from PLR
	'Use Best' selected by default	
	Max. Number Of Exemptions	3
	Exclude from PLR	
	Signature Mandatory for Registration	
	Fee % at Certification	

The table below summarises the sections in the User Guide for the PLR Link.

#	Section	Comment
16.2	Parnassus / PLR link Overview.	Summary of the general PLR functionality in
		Parnassus and what is where.
16.3	Parnassus / PLR Link – Web Service.	Web service specific information
16.4	Parnassus / PLR Link – File upload.	File upload specific information
16.5	Withdrawing Learner Achievement	Describes how you should withdraw
	from the PLR.	achievement from a learner in Parnassus and
		how the PLR is then updated
16.6	Re-submitting previously withdrawn	Describes how you should re-submit
	unit / qualification achievement.	achievement for unit or qualification where
		the achievement has been previously
		withdrawn.

#### 17.2 Parnassus / PLR Link Overview

This section gives a general overview of the Parnassus PLR link, the following two sections specifically address the web service and file upload methods of communication with the PLR.

#### **ULN Verification**

earner									
Save Save & Ch	ate Another Save and	Clean Close	Merge Learner						
estiner First Neme -	May	0	Middle Names	ĺ	9	Lest No	nne "	Lessing	
tie -	Not Supplied	٠	Number	124048		UDIO		1345677889	0)
08 *	30/08/1988		Ethnic Ongri	Not Supplied		Gende		Female	*
Die			Nationality	UNITED KINGDOM		Preven	t Learner Data being shared to third parties.	0	
Add Registration	legistrations   Events	Qualification Set I	legistrations   Certificates   Learne	r Identifiers   Learner Ir	mages Notes				
Que	i/Unit Code	Title	Registration I	Date Cent	tre - Site	Status	Standalone Registration	Qualification Set	Created By
O H 115		Lavai 1 Skills ()	15) 24/09/2018	Auril	New - site 1 (1275,001)	Complete	No	QS2	Q2

#### 1.3.1.8 ULN Format Check

When a ULN is entered to Parnassus the format of the number, number of digits and internal structure, is checked. If it is invalid a warning is displayed. This check is performed by Parnassus independent of any PLR link.

#### 1.3.1.9 ULN verification against the PLR

ULN can be validated against the PLR using Parnassus web service module when purchased. This can be done manually or automatically; see section; Parnassus / PLR link - web service. ULN's are validated by the PLR during achievement upload, with failing ULN;'s result in rejection of achievement. Each AO needs to decide if they want to "pre validate" ULN's prior to achievement upload.

#### **Achievement Upload**

Qualification and Unit Achievement information can be submitted to the PLR in one of 3 ways;

- Manual Upload (User initiated, needs web service link).
- Automated upload (needs web service link).
- File upload (user initiated, needs file upload module).

To be considered for upload to the PLR an entity must meet certain requirements. These are as follows:

- The ULN must be filled in against the learner record (This does not need to have been validated with the LRS, however if invalid information is present this will result in errors being returned from the PLR).
- The UN against the unit to upload the unit achievements.
- Have a valid UK postal code, or no postal code.
- Have a date of birth entered in Parnassus.
- Have a valid assessment language.
- The QN against the qualification if the qualification achievement is to be uploaded from the qualification registration in Parnassus.
- Have an award date against the achievement in Parnassus.
- The grade is **not** a Fail or was created as an alternative achievement.

Add Assessment.	When the user adds a new assessment record an action to create the record against the PLR is created.
Modify Assessment Date.	When the user modifies the assessment date within Parnassus any existing record against the PLR is withdrawn, and a new record is created.
Delete Assessment.	The achievement is withdrawn from the PLR.
Recalculate Qualification Registration.	If it is the first time the learner has achieved a grade against the qualification registration a record will be created on the PLR, else the existing grade will be withdrawn and a new grade uploaded if the grade has changed from the last one uploaded.
Delete Qualification Registration.	All achievements for the Qualification Registration are withdrawn (if they have not already been withdrawn), together with the overarching qualification registration

#### Events that trigger actions against the PLR

#### Modification of key fields

If any of key fields within Parnassus which are required by the PLR are filled in after assessments have been added to Parnassus, this will trigger data to be included in the next set of data for upload to the PLR if these records are considered valid for uploading.

Key fields are;

- Learner ULN
- Unit UN
- Qualification QN

Note: Once achievement data has been uploaded for a learner the ULN may not be modified.

#### Viewing Achievement Data submitted to the PLR

Unit

Unit Registration D	etails			
Unit Unit Code	Graded Unit			4
Registration Date	28/04/2015	Last LRS Action Last LRS Action Date	Withdraw 28/04/2015	
Include On Award				
Grading Prerequisites				

#### Qualification



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#### 17.3 Parnassus / PLR Link - Web Service

With the web service link module;

- ULN's can be verified against the PLR (individually or as a batch)
- Learner unit and qualification achievement can be uploaded to the PLR (individually or as a batch)
- Gordon Associates help manage the process of setting up the link and liaise directly with the Learning Records Service (LRS) on behalf of the awarding body to achieve this.

There are settings in Parnassus which limit the ULN's and Achievement available for upload to the PLR. Gordon Associates will discuss with each AO what achievement they require to upload and ULN's to validate and configure the settings as required.

The following sections detail the 3 items above.

#### **ULN Verification**

When the Parnassus web service link is enabled the PLR can be used to verify a Learner ULN is the correct ULN for the learner. This service is provided by the Learning Records Service (LRS) and was often previously referred to as MIAP.

Learner											
Save Save & Creat	e Anocher Sa	we and Close	Close	Merge Learner							4
earner First Name *	Eva			Middle Names			Last Name *			Faulkner	
itle	Miss	~		Number	1100000998		ULN 0 +		<	1277751950	0
08 *	21/11/1989			Ethnic Origin	Not Supplied	~	Gender *			Female	-
CN O				Nationality	Not Supplied	~	Prevent Learner Data b	eing shared to this	d parties		
Details Access Re	gistrations Eve	ents Quelific	ation Set I	Registrations   Certil	icates   Learner Identifier	s Learner Images No	tes (1)				
Add Registration											
Qual/U Code	nit Title	B			Registration Date	Centre - Site		Status	Standalone Registration	Qualification Set	Created By

#### 1.3.1.10 Automatic

The "normal" mode of operation is to schedule ULN verification using the Prometheus module of Parnassus. Prometheus runs in the background verifying any ULNs that are marked as not yet verified. You should advise GA of when you want this to run, and we will set this in Prometheus. It is anticipated achievement will be uploaded on a daily basis, likely overnight.

The background process verifies any learners that have been imported in bulk during the day – or any learners entered manually where the icon has not been clicked.

If any ULNs fail verification in the background process then an email is sent to a nominated email address with a listing of ULNs failed along with reasons.

#### 1.3.1.11 <u>Manual</u>

Next to the ULN field is a button which shows:

- ULN has not yet been verified; this icon can be clicked to which will cause Parnassus to communicate with LRS to verify the ULN against the first name, last name and date of birth; this results in a success or failure message being displayed and the icon changing to one of the following:
- ULN has been verified and does not match first name, last name and date of birth
- ULN has been verified and matches first name, last name and date of birth

(N.B.If a partial match is identified then the icon will show as the *i* icon together with a user message when you hover over the icon with the mouse pointer this partial match information is not retained)

The ULN field can still be edited even if it's been verified. e.g. green tick icon above.

#### 1.3.1.12 <u>ULN field</u>

If achievement has been successfully uploaded to the PLR Parnassus prevents the ULN being updated.

#### 1.3.1.13 <u>General</u>

The background process updates the ULNVerificationStatus of each learner – and if a user looks at that Learner record in Parnassus the income in the process of the second second

#### 1.3.1.14 <u>Reports</u>

There is a report of ULNs that have failed verification that can be run from the Reports screen in Parnassus.



#### **Achievement Upload**

See the Achievement Upload section in the Overview section for general information on uploading achievement.

#### 1.3.1.15 <u>Automatic</u>

The "normal" mode of operation is to schedule achievement upload via the web service using the Prometheus module of Parnassus. Prometheus runs in the background and uploads achievements, as a batch, that are due for upload to the PLR. You should advise GA of when you require achievement upload to run, and we will set this in Prometheus. It is anticipated achievement will be uploaded on a daily basis, likely overnight.

#### Sending Achievement to the PLR – The Process

At the set times Parnassus will submit achievement to the PLR. If batches are running as a daily job then batches will be submitted to the PLR as long as there is data and there are outstanding batches available.

LRS have set the following constraints on the web service;

- Maximum Batch Size Each Batch can contain up to max of 10,000 records
- Maximum number of batch uploads There are a limited amount of batches and user batches that can be submitted in a day, if the maximum number of user batches has been exceeded the pending actions will remain queued until they have either been successfully submitted in a batch job or a manual request on another day.

These are correct at the time of writing, and subject to change as determined by the LRS.

The PLR queues the whole Batch sent (at the Learner Record Service) and process them into smaller batches and then send back the result once processed all have been processed.

The batch upload process also validates ULN at the same time and any record within the batch upload will fail if its ULN isn't valid.

When a batch is submitted and then completed by the PLR, notification of this is emailed to a specified email address. This will detail the No of records, No of exact, possible and partial matches, plus other details.

#### Partially Failed Batches

If a batch fails which contains records that would have successfully been uploaded to the PLR, the records that would be successfully uploaded will be forced onto a separate batch submission where only those records which are guaranteed to be uploaded will be processed, this is to ensure these are processed with a high priority in the next batch.

#### Schema Validation

Failure of schema validation checks on the PLR count towards the daily total of batches that can be submitted for a given day, in order to prevent repeatedly attempting to upload data to the PLR which will fail these checks, the XML to be uploaded is validated against a schema stored within the PLR integration DLL as a resource, this ensures the integration DLL will communicate with the schema it was developed against.

#### Seeing what Achievement has been uploaded

The Qualification Registration and Unit Registration screens show the status of achievement upload to the PLR. There are screenshots of these screens in the section Parnassus/PLR Link Overview.



#### 1.3.1.16 Achievement upload Errors

If an action against the PLR has resulted in an error, when the record is viewed in Parnassus the "Last LRS Action" will have (Error) next to the last LRS action that was attempted against the entity being viewed, and the assessment Attempts grid will have the Last LRS Upload date highlighted in Red as shown below -

Init Init Code	Paediatric emergency first aid									*
Registration Date 10/12/2014			]	Last LRS Action Create (Error) Last LRS Action Date 20/04/2016						
nclude On Award	V						1			
Add Grade						/				
Assessment Date				_		/				- 1
Grade	Sel	ect Grade		*	Erro	r Links				
Result Release Date						$\setminus$				
Attempts	Add					,	\			
Grade Ass Dat	essment e	Assessment Venue	Void	Last Modified Date	User	Alternative Achievement	Last LRS Upload	Release Date	Expiry Date	
🗱 🍃 Pass 30/1	2/2014			07/04/2015	ga	No	20/04/2016			

Clicking on the error links will display the error(s) in a popup window -

Message	from webpage	×
	Create Achievement failed due to the following error(s) Unable to create achievement as it already exists.	
	ОК	

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#### **Implementation Process**

Following the decision to proceed with the Parnassus Link to PLR module the customer registers with SFA and sign up to the agreement.

Customer completes a Sandpit application form to LRS and will receive various login details that are required by GA for configuring the link (GA can provide help with this if required).

The customer will need to provide various account settings and digital certificate with password – GA can provide a spreadsheet for customer to complete.

GA configure settings linking to LRS Sandpit.

Customer carries out testing of single ULN validation and single achievement upload, mainly to test the link to LRS, using LRS Sandpit dataset.

No need to carry out bulk ULN validation and bulk achievement upload as it uses the same functionality, but is batched.

Once the customer is happy with testing they will need to complete and submit a 'Live' application for to the LRS who will provide New credentials for Live which GA will require for the configuration of the live Parnassus link to PLR.

GA installs Prometheus and the Parnassus link to PLR in Live environment and configure. It is recommended that customer starts ULN validation and batch upload from a current date to avoid the potentially mammoth task of validating all ULN's and having to resolve all the error's that could be returned.

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#### FAQ's

#### Upload Achievement

#### How does the system know to upload actual qualification achievement?

It will know to upload qualification registration when it has a valid grade, and this will not be set until all of the units linked to that qualification registration have their own respective unit grades. A valid unit grade is selected for batch upload as soon as the grade is applied.

As soon as the data meets this plus the other criteria (learner dob, firstname, lastname, ULN etc), then this record will be added to the list of items to be submitted to PLR.

## Does it send a completion date? If so, is this the date the last grade entered, or possibly the latest assessment date for a unit grade on that qualification or the assessment date of the last unit?

We send across the AchievementAwardDate – which is from AssessmentDate – In terms of the database, for the Qualification registration, it's the latest date from the linked pathwayunitregistration and pathwayunitassessment – for the units it's the assessmentdate from the pathwayunitassessment.

#### Can you tell me the contents of the batches sent across to the PLR?

We only hold a history of batches sent/not sent, and batches in the upload queue. However the contents of the batch sent can be viewed by the AO by logging into the LRS portal. The AO will have a Batch identifier (xml file name which is referenced in the emails generated by Parnassus when batches are sent to the PLR)

# How does Parnassus handle learners where the assessment language is set to Welsh (not English)? An error appears when uploading achievement as follows: "Create Achievement failed due to the following error(s) 'Field validation failed on 'Language for Assessment' Achievement Record field."

The assessment language table has a column called iso639\_2Suffix, this will need to be populated with a B. On this web site <u>http://www.loc.gov/standards/iso639-2/php/code\_list.php</u> the ISO 639-2 Code value for welsh is 'wel (B)'.

#### Verify ULN

#### If there's a 'possible' match, how do we solve it and say, yes it is or no it isn't?

This means that out of the 5 pieces of information at least 3 of them match. (ULN, GivenName, FamilyName, DateOfBirth, Gender)

You can log on to the Portal at LRS and check the particular learner to see what the PLR is expecting, e.g. it might be that Givenname in PLR is 'Andy' where as the Givenname your supplying is 'Andrew' for example.

### If an achievement fails to upload as the verification failed because of an incorrect ULN, does the routine resend it automatically if the ULN is corrected?

Yes, if the achievement has failed, in this example because of an incorrect ULN, and a correct ULN is re-entered, then this will trigger an action for the achievement to be re-sent to the PLR.

#### **Further Information**

Verify ULN, possible outcomes;

**Exact Match**: This result will occur where each of the incoming parameters matches exactly with those of a Learner held on LRS.

**Exact Linked Match**: A match was found on the same basis as described for 'Exact Match', but the ULN Register Record identified is that of a Linked

Learner (in other words, it has been merged with another Learner which is the Master ULN). The details returned will be those of the Master Learner.

**Similar Match**: This result will occur where the incoming ULN was found but the associated GivenName and/or FamilyName were similar but were not an exact match.

**Note:** If the name fields were similar, but the Gender and/or Date Of Birth are supplied in the search criteria and either of these do not match, then the outcome will be 'Learner Does Not Match'.

**Similar Linked Match**: A match was found on the same basis as described for 'Similar Match', but the ULN Register Record identified is that of a Linked Learner (in other words, it has been merged with another Learner which is the Master ULN). The details returned will be those of the Master Learner.

**Learner Does Not Match**: This result will occur where the incoming ULN was found on the LRS Portal but any or all of the associated fields do not exactly match (WSVRC001 or WSVRC002) or meet the criteria for a similar match (WSVRC003 or WSVRC004).

ULN Not Found: This result will occur where the incoming ULN does not exist on LRS.

(Source: WBS23 LRS Web Services Interface Specification V3.7 August 2012.pdf)



#### 17.4 Parnassus / PLR Link – File upload

The Parnassus achievement file upload provides a simplified alternative method of uploading achievement to the PLR.

With this option;

- All Learner ULN verification against the PLR and any updating of ULN's in Parnassus is done manually.
- Learner unit and qualification achievement can be uploaded to the PLR via a file exported from Parnassus.
- The AO is responsible for handling all processes around setting up their account with the Learning Records Service (LRS) and processes required to gain AO approval for uploading data to the PLR.

There are settings in Parnassus which limit Achievement available for upload to the PLR. Gordon Associates will discuss with each AO what achievement they require to upload and configure the settings as required.

The following sections detail ULN verification options and creating a Parnassus Achievement Upload file.

#### **ULN Verification**

Section 1.2.1 ULN Verification describes standard Parnassus ULN verification functionality.

It is not necessary to verify ULN's in Parnassus prior to uploading achievement to the PLR as ULN's are verified during achievement upload. Achievement with "failing" ULN's is not accepted by the PLR. The correct learner ULN should be got from the PLR and Parnassus updated with the correct ULN, so future achievement uploads will pass this ULN verification check.

Discrete ULN verification and updating of ULN's in Parnassus is done manually if this option is chosen. AO's should decide if they prefer to "pre-verify" all ULN's prior to achievement upload, or upload achievement with ULN's that have not been verified. If you require assistance with this please contact Gordon Associates.

#### **Achievement Upload File**

The purpose of the Achievement File is to create a set of achievement data from Parnassus for upload to the PLR. This saves having to create the file manually.

An Achievement Upload file can be created from the Reports section of Parnassus, as screenshot below.

Bath Data	Ofqual QDC	Create PLR Achievement Fil
Loading Repo	rts From	
Standard Re	eports	
Custom Rep	oorts	
BatchRegisti	rationsSummaryF	leport 🔷
Candidates		
Candidates	Full Certificates B	y Event
Centre Risk	Rating	
Candidates		
Quals Offere	ed	
Registration	s	
Cert Reques	ted Not Cert Due	
Cer <mark>ti</mark> ficates		
Certificates	Created - Ful <mark>l</mark> Uni	t i
Certificates l	Due - Partial (Not	Standalone)
Certificates	Due - Qualificatio	n
Cer <mark>t</mark> ificates l	Due - Units (Not S	tandalone)
Certificates	Due - Units (Stand	dalone)
Cloud - Fina	nce - Additi <mark>on</mark> al U	nit Registrations
Cloud - Fina	nce - Qualificatior	Registrations
Cloud - Fina	nce - Qualificatior	n Sets
Cloud - Fina	nce - <mark>Unit</mark> Only Re	gistrations
Cloud - GA F	legistrations Repo	ort
Disability an	d Reasonable Ad	ustments Report 🔹

#### Notes

 When the file is created Parnassus updates itself to say the achievement has been exported to the PLR. The file is also available to download if you select it in the Parnassus generated files window as below.



- 2. Once the file is created all subsequent processes are done manually and external to Parnassus.
- 3. It is only possible to create the file once, and the file cannot be re-created from Parnassus.
- 4. LRS provide a file validation tool via the AO portal. Use this to check the structure of the file is valid prior to upload to the PLR. Data validation is only performed during the upload to the PLR itself.
- 5. Any data amendments required to pass PLR data validation should be done in the file and manually in Parnassus as required. For example ULN correction.



#### General File creation and upload process

#	Step	Notes
1	Create Achievement File	The file will be output to the pre-defined location set in Parnassus and is available to download.
2	Upload file to the PLR	LRS provide a file validation tool to check the file is of the correct format. Amend data in file as required to enable data upload to the PLR It is recommended files are uploaded on a regular basis so
		there is a manageable amount of data being uploaded.
3	Withdraw / re submit withdrawn achievement	If a learner has achievement withdrawn or re submitted this should be done in Parnassus first. The achievement should then be withdrawn / resubmitted to the PLR. The following sections of the user guide details this.

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#### 17.5 Withdrawing Learner Achievement from the PLR.

This section describes how you should withdraw achievement from a learner in Parnassus and how the PLR is then updated.

#	Step	Comment				
1	Withdraw unit achievement in Parnassus.					
2	Update the PLR for the withdrawn unit achievement.	If you use the <b>web service</b> link – Wait for the next scheduled achievement upload or manually submit the achievement If you use the <b>File upload</b> , the updated Unit achievement will be included in the next exported file.				
3	Update the PLR, as required, for affected qualification achievement.	If the Parnassus qualification status changes back to In Progress, as a consequence of withdrawing the unit achievement, the Qualification Achievement on the PLR should be updated via the AO Portal.				

The following sections detail the processes in Parnassus for the above steps.

#### 1.3.1.17 <u>Withdraw Unit Achievement in Parnassus</u>

Unit F	Registrati	on Details									
Unit Unit Cod	de	Paer	diatric emergency fir A01	st aid							*
Registrat	tion Date	10/	12/2014		La La	st LRS Acti st LRS Acti	on Create on Date 20/04/20	16			
Include (	On Award										
Add G	Grade	ites									^
Assess	ment Date										
Grade		-	Select Grade		*						
Result	Release Dat	e	_								
Attom	nte	A	dd								
Atten	Grade	Assessment Date	Assessment Venue	Void	Last Modified Date	User	Alternative Achievement	Last LRS Upload	Release Date	Expiry Date	
<b>x</b> (	Pass	30/12/2014			07/04/2015	ga	No	20/04/2016			
											~
									9	Save & Close	Close

Remove the Grade by clicking on the red 'X'.

If you have the **web service** link wait for the next scheduled batch upload, which will send these details to LRS.


If you upload achievement via **File Upload** the update will be included in the next file that is created

Unit	Graded Unit			٠
Unit Code	gradedUnit			
Registration Date	28/04/2015	Last LRS Action Wit Last LRS Action Date 28	:hdraw /04/2015	
Include On Award				

#### Withdraw Learner Qualification Achievement

If withdrawing unit achievement causes the Qualification registration status in Parnassus to go to 'In Progress', then you may wish to withdraw the learner Qualification Achievement. If you do want to do this, do it manually via the LRS Portal.

The LRS Portal can be accessed by going to (Live: <u>https://www.uklrs.miap.gov.uk/wps/myportal/</u>, Sandpit: <u>https://sandpit.staging.miap.gov.uk/secure/</u>) (logon using your AO login details provided by LRS)

#### Steps to withdraw the learner Qualification Achievement:-

- 1. Go to the above url, choose the Manage Learner Achievement tab,
- 2. Then choose withdraw achievement.
- 3. Enter the necessary details ULN, Given and Family name and the Qualification reference number. The Qualification Achievement can then be removed.

#### Note

Parnassus does not automatically re-add the qualification achievement once it has been withdrawn this way. It will need to be manually added – see section "Adding a qualification achievement via the LRS Portal1 for further details.

#### 17.6 Re-submitting previously withdrawn unit / qualification achievement

This section describes how you should re-submit achievement for unit or qualification where the achievement has been previously withdrawn.

If unit or qualification achievement is removed from a learner and subsequently added back on to the learner in Parnassus it **can only** be successfully re-submitted to LRS when at least one of the following key bits of information has changed since the original submission:

- ULN
- Unit or Qualification reference code
- Achievement Award Date

nit nit C	ode		Grad	led Unit IedUnit								4
egistr	atio	n Date	28/0	04/2015		Last L Last L	.RS Action .RS Action Da	Withdraw te 28/04/2015				
iclude Gradir	e On	Award Prerequis	<b>√</b>									
Add	Gra	ade	_									
Asses	sme	ent Date										
Grade	e		s	elect Grade		•						
Resul	lt Re	lease Date										
			Ac	ld								
Atte	mp	ts										
		Grade	Assessment Date	Assessment Venue	Void	Last Modified Date	User	Alternative Achievement	Last LRS Upload	Release Date	Expiry Date	
×	D	в	08/10/2018			02/10/2018	adminav	No				

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#### **Re-submitting unit achievement**

Resubmission of Unit achievement can be done as described in previous sections. If however **none** of the key bits of information has changed then the LRS will return an error when unit achievement is re-submitted. The error is shown in the screen below.

The following error	s were encountered during	) submission of data t	o the PLR.			
Batch Identifier	QCF_SAND0134_2013	QCF_SAND0134_2013-02-21_015				
Error Message	Too many records have loaded.	Too many records have failed validation. No records have been loaded.				
Total Records	1					
Failed Records	1					
Status	Rejected					
PLR Response Me	essages					
ULN	Unit or Qualification Reference Number	Date Awarded (CCYY-MM-DD)	Error Reason			
9732088639	3/601/2101	2013-02-21	Create Achievement failed due to the following error(s) 'Unable to create achievement as it already exists.'			

#### **Re-submitting qualification achievement**

If following the submission of the learner's qualification achievement you receive the following error, it means that the qualification achievement has been withdrawn manually via the LRS portal (via section "Withdraw Learner Qualification Achievement") and does not exist.

The following error	s were encountered during	g submission of data t	o the PLR.			
Batch Identifier	QCF_SAND0134_2013	3-02-21_017				
Error Message	Too many records have failed validation. No records have been loaded.					
Total Records	2	2				
Failed Records	2					
Status	Rejected					
PLR Response Me	essages					
ULN	Unit or Qualification Reference Number	Date Awarded (CCYY-MM-DD)	Error Reason			
9732088639	500/9066/5	2013-02-21	Update Achievemen failed due to the following error(s) 'Unable to update achievement as it has been previously			

To prevent this error the qualification achievement will need to be manually created against the learner via the LRS portal as described below.



#### 1.3.1.18 Adding a qualification achievement via the LRS Portal

You will need to go to the LRS Portal (Live: <u>https://www.uklrs.miap.gov.uk/wps/myportal/</u>, Sandpit: <u>https://sandpit.staging.miap.gov.uk/secure/</u>) (logon using your AO login details provided by LRS)

#### Steps to carry out the above:-

- 1. Go to the above URL, choose the Manage Learner Achievement tab,
- 2. Then choose create achievement.
- Enter the necessary details ULN, Given and Family name, DOB and the Achievement details Qualification reference number, achievement award date, grade, assessment language and UKPRN. The qualification achievement will then be created against the learner.

Once this has been done, then re-submission of the qualification achievement can occur in Parnassus in the batch process (if running) which will send these details to LRS.

### 18. Notes

At various places within Parnassus there is the ability to add notes to a record. All these areas work in the same way as described in this section.

Notes 'tab' can be seen below

	Qualification    Units    PLR    Event Info    Alternative Achievement    Entry Requirements    Qualification Prerequisites    Notes (1)		
İ		~	
ł		~	
	Attach a File Browse Priority Save Note		

Figure 18-1 : A notes tab in Parnassus

You may attach notes to any record which has a notes tab once the record has been saved and an ID assigned.

To add a simple note type the text you wish to enter into the textbox at the top of the notes tab and click on the 'Save Note' button, this will save your note and show it in the grid as below

Qualification U	nits PLR	Event Info	Alternative Achievement	Entry Requirements	Qualification Prerequisites	Notes (1)				
										-
Attach a Fil	e 📃		Browse Priority	Save Note						
Not	e				1	ile Name	Added	User	Priority	
🍃 🗱 learr	ner may nee	ed extra time	to complete				02/10/2018	adminav		

Figure 18-2 : Notes tab populated with some data

Once a note has been added it can either be edited by clicking on the *i* icon and clicking the save button once you have changed the text as required; or deleted by clicking on the *i* icon and confirming you wish to delete it.

Notes can be saved with a checkbox of priority ticked so you can quickly see the most urgent notes. This will priority symbol <sup>©</sup> will show in the grid as below



ualifi	catior	n Units	PLR	Event Info	Alternative Achievement	Entry Requirements	Qualification Prerequisites	Notes (4)	-			
A	Attach	a File			Browse Priority	Save Note						
		Note						File Name	Added	User	Priority	
	×	another n	ot very	important n	iote				02/10/2018	adminav		
2	×	this is a n	ot so in	nportant not	e				02/10/2018	adminav		
2	×	this is a v	ery imp	ortant note					02/10/2018	adminav	0	
2	×	learner m	ay need	d extra time	to complete				02/10/2018	adminav		

#### Figure 18-3 : Notes tab populated with a priority note

**Note:** the maximum size for the text in a single note is 500 characters including spaces, carriage returns etc.

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#### 18.1 File Attachments

You may attach a file to your noted by clicking on the 'Browse...' button and navigating to the required file as shown below and clicking on the 'Open' button.

🛧 🔜 > This	PC + Local Disk (Ci) + DropBox			νõ	Search DropBe	¢	P
rganize = New folder						Q22 • III	
OneDrive	Name	Date modified	Турзе	Size			
This PC	Stopbox 3.8.5 Offline Installer.exe	31/07/2015 16:46	Application	43,904	KÐ		
3D Objects							
Desktop							
Documents							
Ocwnloads							
🔰 Music							
Pictures							
Videos							
Local Disk (C:)							
🛫 Daily Backups (🕻							
🛨 Utilities (\\chick-							
PER (\\chicken\							
Projects (\\CHIC							
File nam	ie .			Ŷ	All Files (*.*)		~
					And a second sec		

Figure 18-3 : File selection window

Click 'Save Note' in the normal way to save the note with the attachment.

In order to be a valid attachment the file must be under 2Megabytes in size and be one of the following types:-

File Extension	Comments
JPG, JPEG	Jpeg images
GIF	Graphics interchange format images
PNG	Portable network graphics format images
TIF	Tagged image format images
DOC, DOCX	Word documents
PDF	Adobe PDF documents (Portable document format)
TXT	Plain text files
XLS, XLSX	Excel spreadsheets
PPT,PPS	PowerPoint documents
RAR, ZIP	Compressed documents/Archives

**Note:** If no text is entered to be saved with the attachment then the text for the note will default to File : <Filename> where filename is the name of the file excluding the directory information.

**Note:** Once a file has been uploaded it may be viewed or the notes record deleted, however the contents of the file may not be modified.

### **19.** Link to Finance Starter Kit (Hermes)

The standard Link to Finance screen can be used as a starting point for an integration to a finance system such as Microsoft Dynamics-GP (Great Plains) or Sage Line 50:- Depending on a configuration setting, the Submit button will export a csv file of records to be invoiced (as an alternative to calling an API); this file could be imported into your finance system.

The standard field list for the file is:

o Batchname o Date o Account (ie site) o PO Number o Fee Description o Product Code o Quantity

You can customise this standard file export if required. There is also standard grouping & ordering as well, which may need to be customised for your project. In addition there is the option of an automated background process which will automatically create csv files periodically, eg the file could be created automatically each night for the transactions logged in that day.

#### 19.1 File Attachments

ear Search Searc	h by Criteria	Set to S	UPRESSED	Set to PENDING Submit to	GP					
Purchase Order		Status	Customer Code	Customer Name	Description	Event Date	Event User	Action Date	Action User	Pro
		SUBMIT -								
Update Select	ed		102 Rows							
-			121.000	1.Doncaster Metropolitan Bo	rough Cound OReg:LICCF : Nathan Hauritz: 312580	25/08/2010 13:27:08	3 GA\ion	25/08/2010 17:01:2	7	P
	R	SUBMITTED		GLOSCAT1		13/08/2010 11:49:10	GA	16/08/2010 15:36:3	9	
	V	SUBMITTED	1	GLOSCAT1		13/08/2010 11:50:1'	( GA	16/08/2010 15:36:3	9	
-	N	SUBMITTED	1	GLOSCAT1		13/08/2010 13:57:41	GA	16/08/2010 15:36:3	9	
		SUBMITTED	1	GLOSCAT1		13/08/2010 14:01:03	I GA	16/08/2010 15:36:3	9	
	<b>N</b>	SUBMITTED		GLOSCAT1		13/08/2010 14:51:57	Z GA	16/08/2010 15:36:3	9	
	1	SUBMITTED		в		13/08/2010 15:20:27	/ GAT	16/08/2010 15:36:3	9	
	N.	SUBMITTED		GLOSCAT1		13/08/2010 15:29:15	GA GA	16/08/2010 15:36:3	9	
	V			8		13/08/2010 15:29:42	2 GA	16/08/2010 15:36:3	9	
1	<b>N</b>	SUBMITTED		DK1		13/08/2010 15:31:37	GA.	16/08/2010 15:36:3	9	
		SUBMITTED		GLOSCAT1		13/08/2010 15:50:07	/ GA	16/08/2010 15:36:3	9	
-	M			Golf Site		13/08/2010 15:50:23	GA GA	16/08/2010 15:36:3	9	
-	V			GLOSCAT1		13/08/2010 16:14:37	Ga	16/08/2010 15:36:3	9	
	. 🖂	SUBMITTED		GLOSCAT1		13/08/2010 16:27:30	) ga	16/08/2010 15:36:3	9	
-		SUBMITTED	1	DK1		13/08/2010 16:27:47	/ ga	16/08/2010 15:36:3	9	

Figure 19-1 : Hermes – Finance Starter Kit

Field Name	Purpose
Purchase Order	Search for fees associated with a specific Purchase Order Number.
Status	Mandatory: must be one of the selectable values.
Customer Code	Search for fees associated with a specific Customer Code from the originating system.
Customer Name	Search for fees associated with a specific Customer Name from the originating system.
Description	Fee description from the originating system
Event Date	Date the Event which raised the Fee Type occurred.

Event User	The User who created the Event which raised the Fee Type.
Action Date	Date that a Hermes Action was initiated (i.e. Change of status).
Action User	The User that initiated a Hermes Action(i.e. Change of status).
Product	The associated Fee Type
Account	Finance Account code in the destination system
Batch	Generated by Hermes when the record is submitted.

Button	Purpose
Clear Search	Clear any existing search criteria
Search by Criteria	Perform a search using the entered search criteria
	Select any rows which will be actioned.
Set to SUPRESSED	Set the selected row/s to a status of 'SUPRESSED'.
Set to PENDING	Set the selected row/s to a status of 'PENDING'.
Submit to GP	Export the select row/s to the CSV export file.
Update Selected	Update the selected row with the entered Purchase Order Number.

#### 19.2 Purchase Order Number

It is possible to enter a purchase order number on:

- Import of files of Qualification Registrations
- Import of files of Grades containing Certificate Requests
- In both cases:

- a separate purchase order number can be entered on each row of the file (PurchaseOrder column heading needs to be configured in RegTranslation.xml by GA) and/or

- a purchase order number for all rows can be entered on the File – Open window of the import process; this overwrites any purchase order numbers within the file

The purchase order number is not shown on the qualification registration screen – it is only used by exports to a finance system via the Hermes Link to Finance and can be seen on this screen.

#### 19.3 Fee Types

The following fee types are captured:

Field Name	Purpose
UREG	Unit Registration (aka REGU)
CERTDUP	Duplicate Certificate
QREG	Qualification Registration (aka REGF)
LIFET	Lifetime Registration
VISIT	Centre Visit
CERTQ	Qualification Certificate
CERTU	Unit Certificate
TRANSFER	Transfer

ADMIN2

Upgrading from Unit Registrations to Qualification Registration

### 20. Link to eAssessment Starter Kit (Diomedes)

A new module has been developed, which provides a starting point for any link to an eAssessment system in the future. This provides the structure for sending a list of eligible learners to an eAssessment package and receiving achievement back at a later date. The transfer of data can be actioned by the user or it can run as a background process (every *n* minutes or at a specified time each day/night).

NB. There is a license fee for this module and there will always be work that is specific to your eAssessment package. However this module is intended to reduce eAssessment integration by at least 50%.

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### 21. Service Layer

Parnassus has a service layer that allows for integration with other systems. This is now the recommended interface if you are performing any kind of integration with Parnassus. Please contact GA for further details.



### 22. Audit History

Whenever the Audit History icon is shown within Parnassus, selecting the Audit History icon will display the Audit History for that area.

The information for each screen is dependent upon where the Audit History screen was accessed from and may vary to the screen shown below.

Audit History													
Learnerld	Created	Modified	Deleted	ModifiedUser	FirstName	LastName	MiddleName	Region	AddressIdValue	DOB	PreviousSurname1	PreviousSurname2	F
ea6bf981- 86ed-e411- 8426- 00155d037201	28/04/2015 10:11:10	02/10/2018 14:10:10		adminav	PLR Test	Testing	John			01/01/1991 00:00:00			
ea6bf981- 86ed-e411- 8426- 00155d037201	28/04/2015 10:11:10	02/10/2018 14:09:05		adminav	PLR Test	Test	John			01/01/1991 00:00:00			
Close													

Figure 22-1 : Audit History in Parnassus

