

Project Name	Parnassus
GA Project Number	428
Document	User Guide

Current Issue				
Date	Issue	Parnassus Version	Author	Change
16/05/2023	5.8	V5.8	Avril Austin-Harvey	Two factor Authentication page 10 2.5 User search information 7.1.9 Learner merge learner code history *** 7.2 Use Best by date or grade 8.3 Qualification risk rating 8.10 Unit assessment type -Not Assessed 9.2 Unit mark – new grade calculation 9.4 Unit Outcome assessment criteria

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

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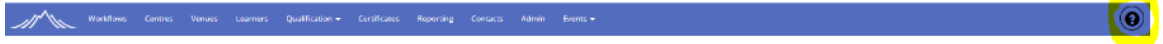
Parnassus v5.8

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

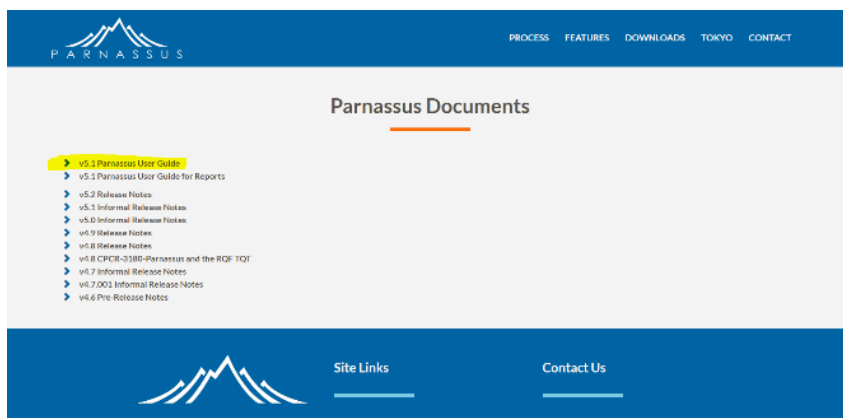
<http://www.parnassusonline.com/release-notes/>

Overview

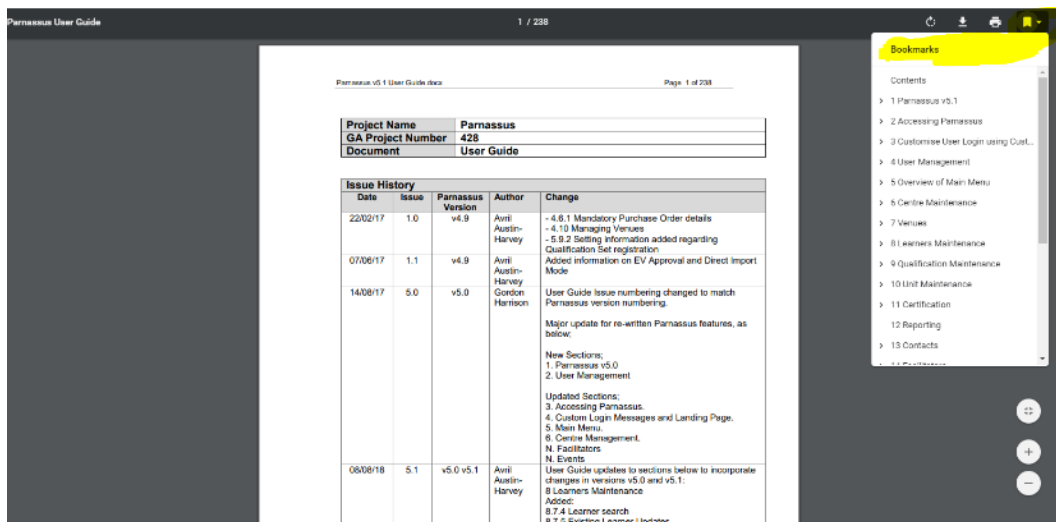
For version 5.2 and onwards the User Guide and other helpful documents are now accessed by clicking on the help icon in the righthand corner of the top menu:



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:



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



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 www.parnassusonline.com

System Overview – What's New?

Two factor Authentication

This feature adds increased security, where Parnassus prompts the User for a second factor when logging in. For example clicking a link in an email sent to them or entering a code from an authenticator app. Please contact Gordon Associates if you are interested in enabling two factor authentication

Ability to record Assessments against a Qualification

GA have called this Sub Units. The functionality allows a Unit to be defined as an Assessment. It is possible to have multiple assessments on a Qualification. Please contact Gordon Associates if you are interested in this feature and require further information and details are available in a separate **Sub Units User Guide**.

Unit Outcome Assessment Criteria

Please contact Gordon Associates if you are interested in this feature and require further information

What will change going forward?

The next planned change in Parnassus is

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 [or using two factor authentication \(2FA\)](#). [We have separate User Guide for two factor authentication please contact us for more information.](#)

This is the message that is displayed on the Parnassus Login page.
Put messages here with general information here that is applicable for all Users.
As the User hasn't logged in at this point, the message can't be User specific!
If you use HTML you can format the text in different ways to make it easier to read.
For example, *italic* or underlined or **bold**
And line breaks too!!

Username
ga

Password
.....

Remember Username

[Forgot Password?](#)

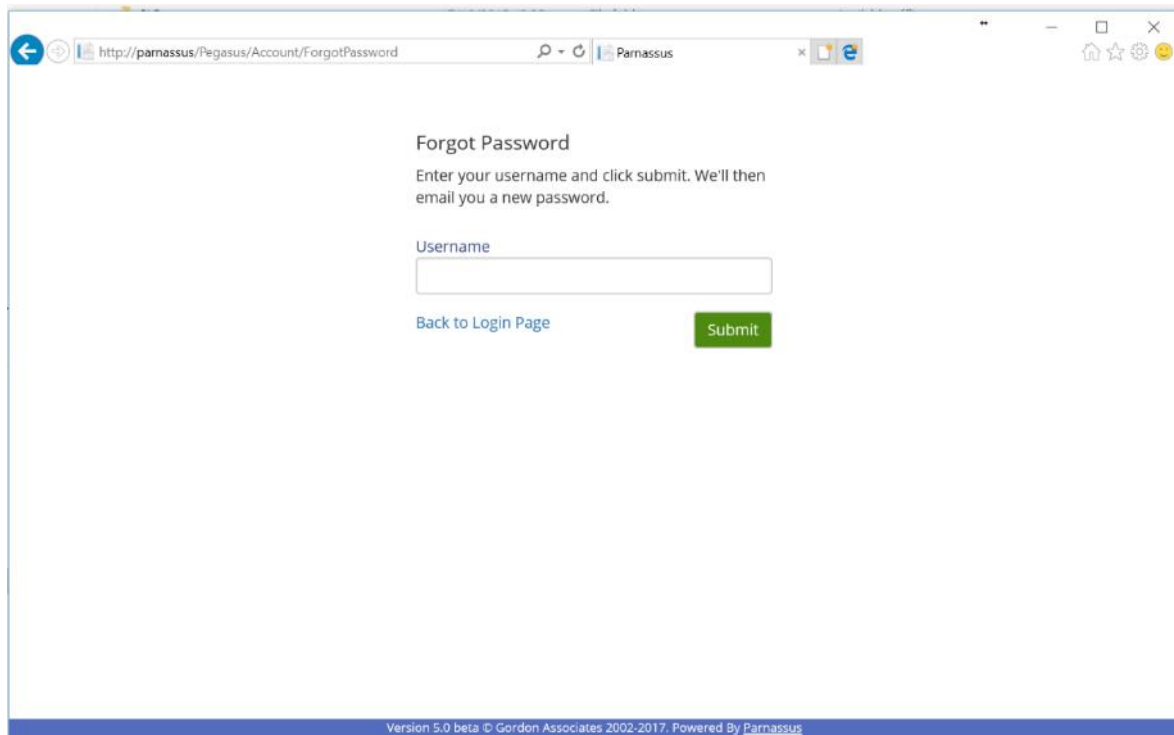
Version 5.0 beta © Gordon Associates 2002-2017. Powered By [Parnassus](#)

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.



Forgot Password

Enter your username and click submit. We'll then email you a new password.

Username

[Back to Login Page](#)

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Figure 1-2 : Forgotten password page

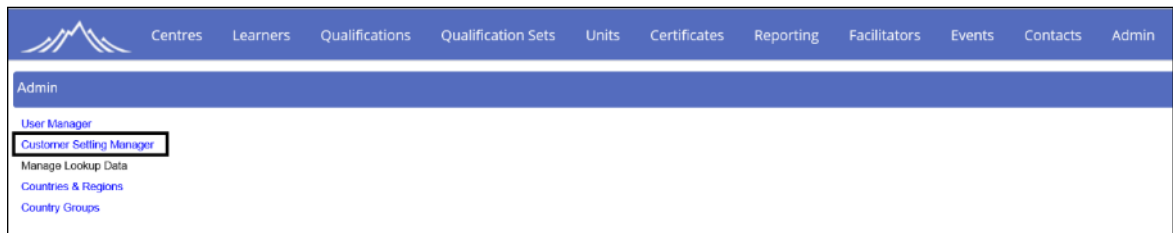
- Enter your Username in the textbox and click Submit.
- This will reset your password
- If Parnassus is configured to send an email, the email containing your new password will be sent to the email address which was provided when the login credentials were created.

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

1.3 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.

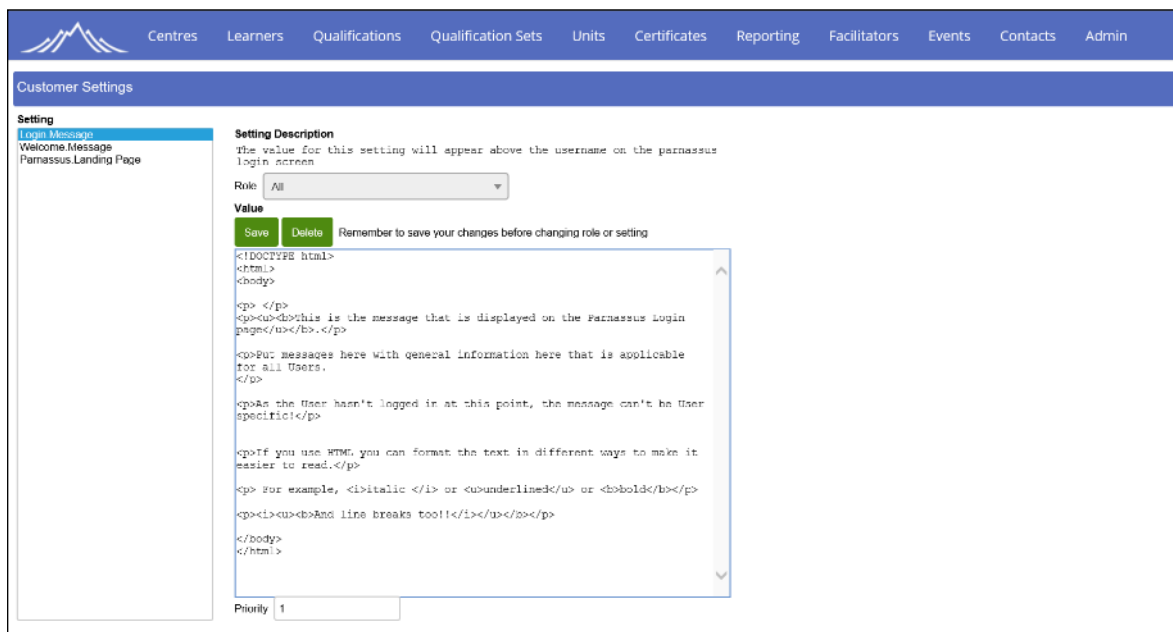
This is done via to the 'Customer Setting Manager' option, as shown in the screen shot below.



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

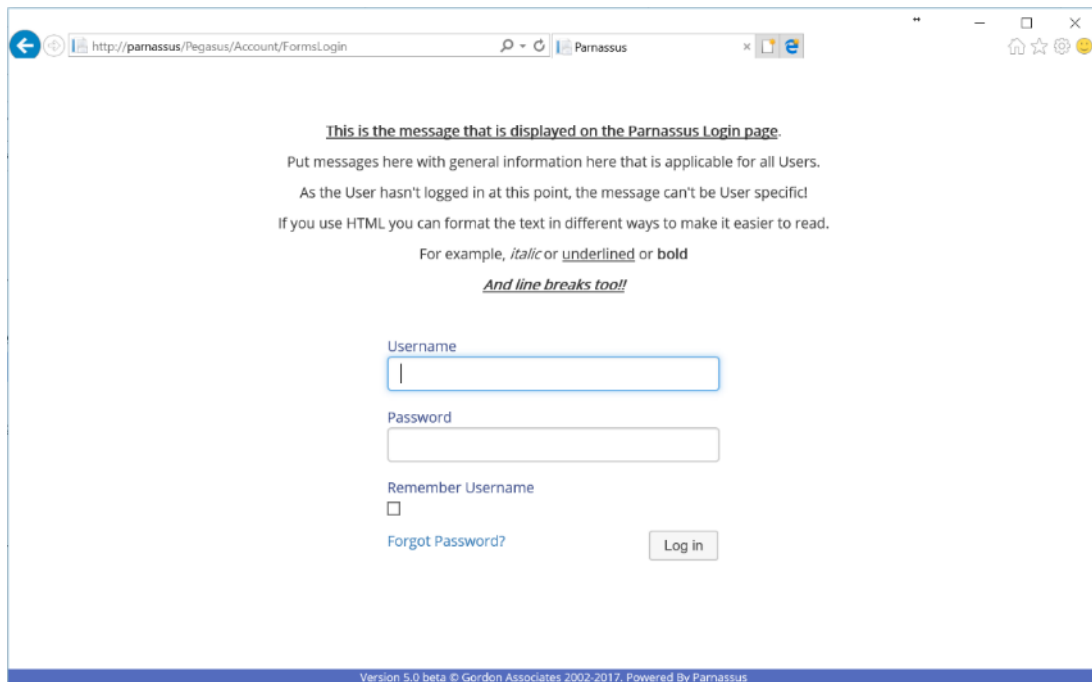
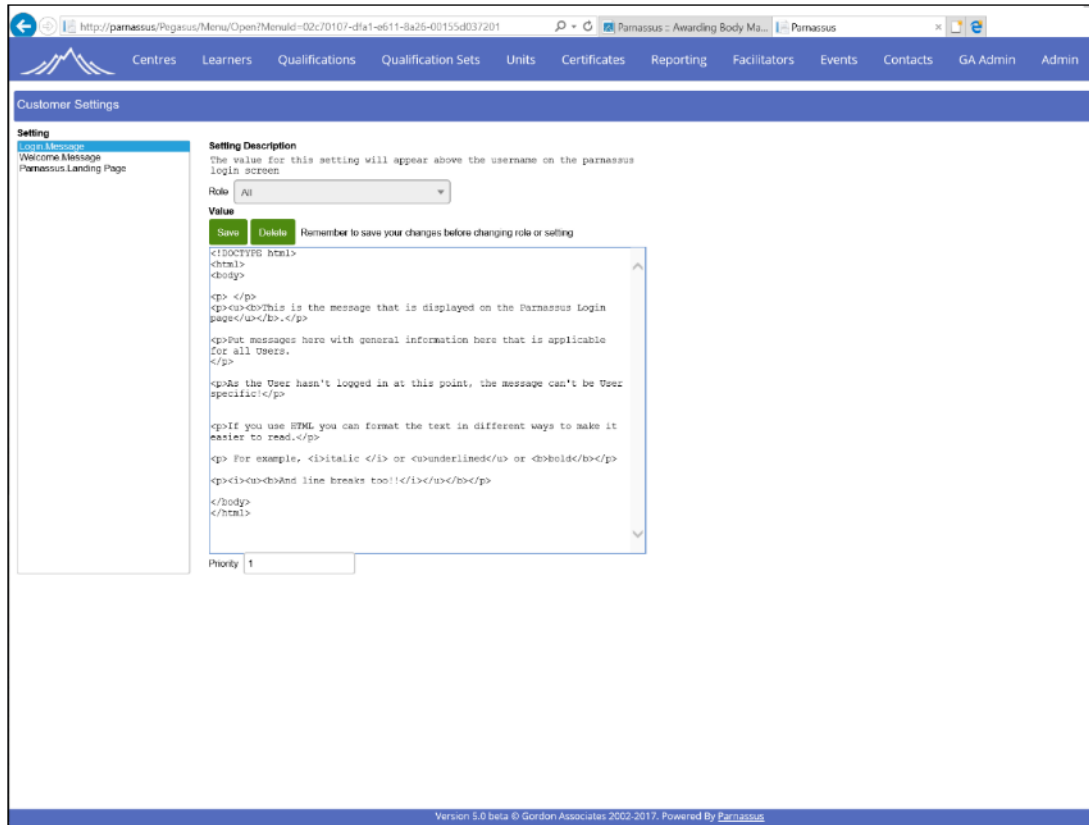
- Login Message
 - a message on the screen where Username and Password are entered.
- Welcome Message
 - a message specific to User Role displayed when the User logs in
- Parnassus Landing Page.
 - a User Role specific landing page, the initial page the User sees following login.

Each of these is described in more detail below.



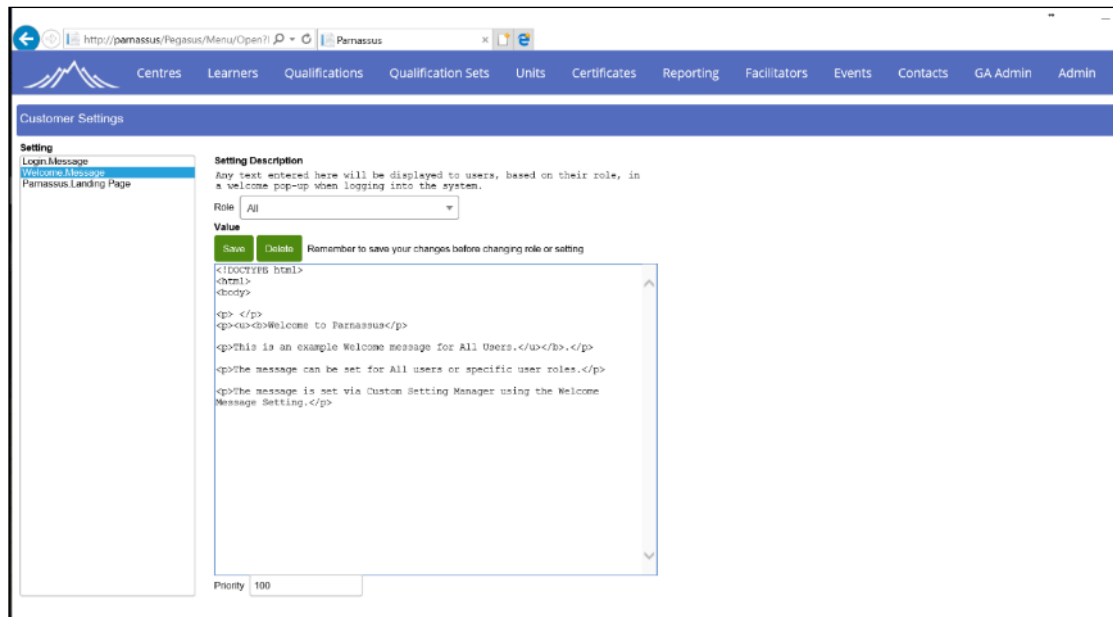
1.4 Login Message

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.

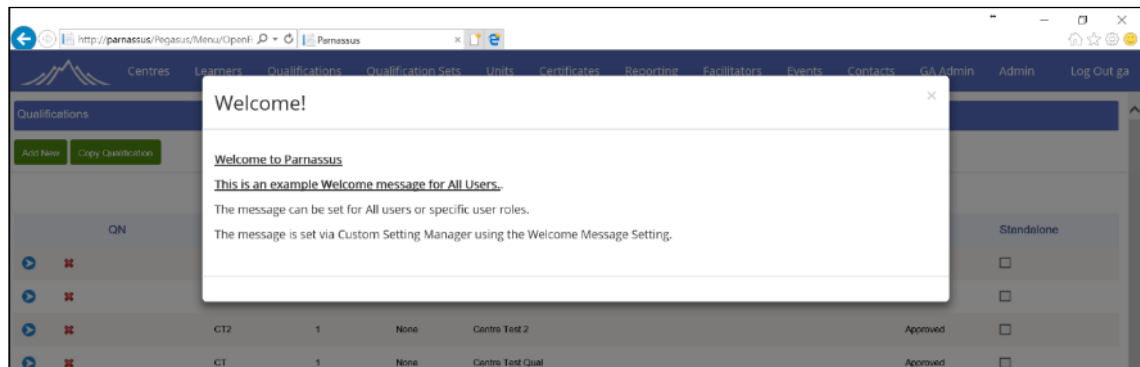


1.5 Welcome Message

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.

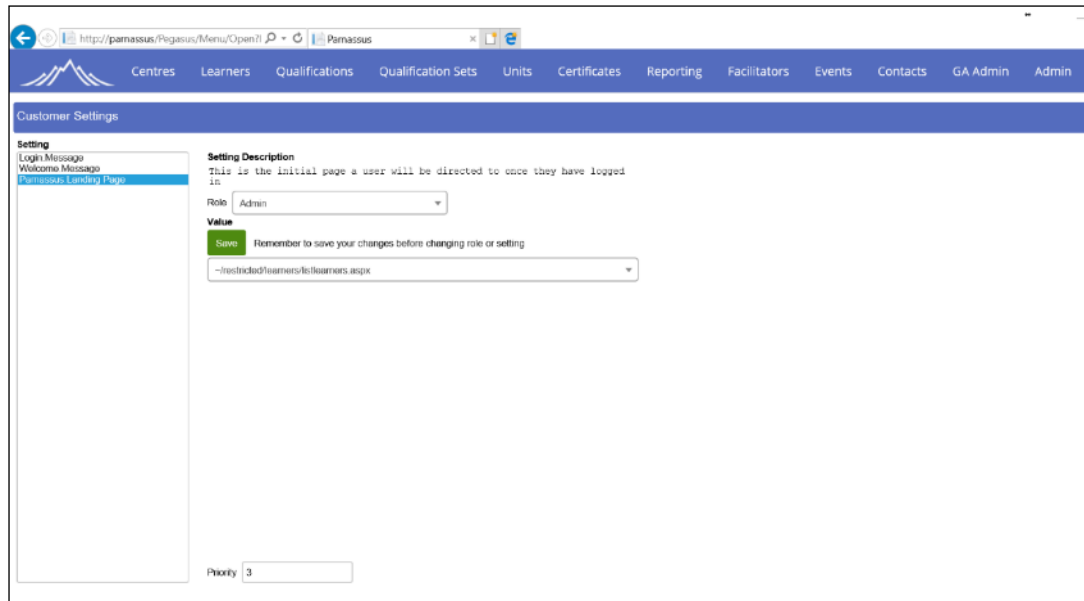


- A single post login message can be set for All roles, or if you prefer a message per User role.
- When Users are in multiple User roles a single post login message is displayed. The message displayed is the message for the role with the highest priority. Example; User in Admin and User roles. Admin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

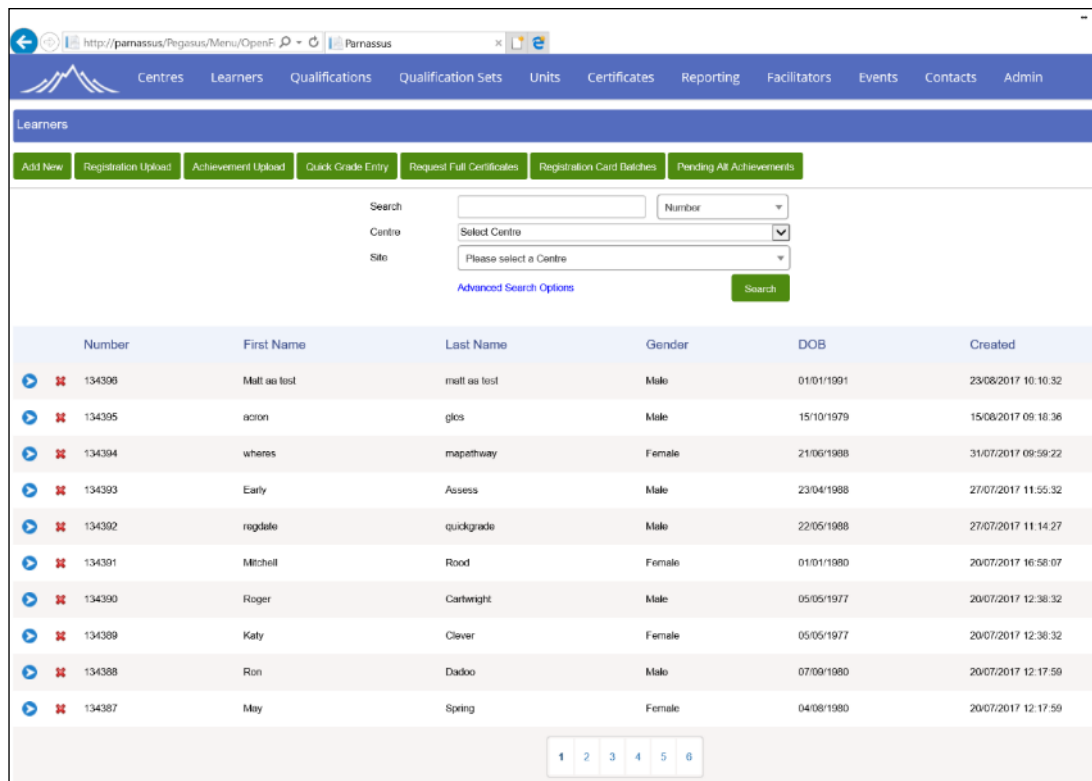


1.6 Parnassus Landing Page

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

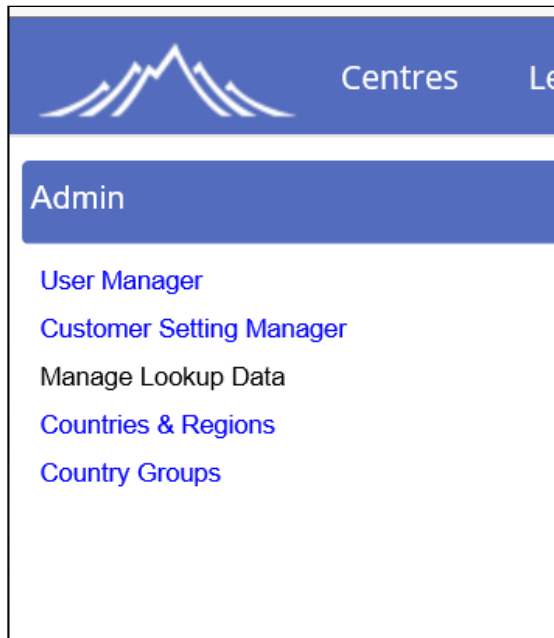


- The landing page can be set for All roles, or if you prefer per User role.
- When Users are in multiple User roles, use the Priority setting to determine which landing page is displayed. The landing page for the role with the highest priority is used.
Example; User in Admin and User roles. Admin Priority 1, User Priority as 2, the Admin landing page is displayed.
- If no landing page is set up the default is the List Centres page.



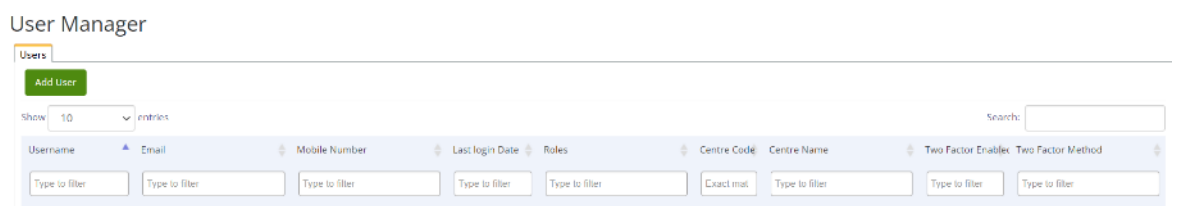
2 User Management

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



2.1 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.



2.2 Enter Key User Data

User Manager

The screenshot shows a web form titled 'User Manager' with a sub-tab 'Users'. The form is for adding a new user and contains the following elements:

- Add User** (Section Header)
- User Name**: Text input field
- Email:** Text input field
- Mobile Number:** Text input field
- Password (Optional)**: Text input field
- Associated Centre**: Dropdown menu with 'None' selected
- Create User**: Green button
- Cancel**: Green button

- 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.

2.3 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.

The screenshot shows a window titled 'User Manager' with a list of roles and checkboxes. The roles listed are:

- Admin
- Centres
- EV
- Examiner
- Learner_Grades
- Roles Learner_Registration
- ReportUser
- Supervisor
- Teacher
- Users
- Users RO

At the bottom of the window are two green buttons: **Finish** and **Cancel**.

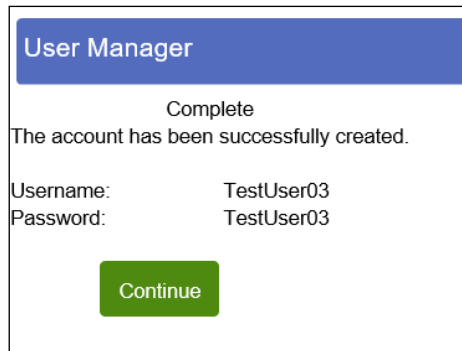
- **Key Point** - Centre Users must ALWAYS have the Centres role ticked.

Out of the box Parnassus Roles

User Role	Functionality	Comments
Admin	1: Can Delete Learner 2: Can Add Qualifications\Units 3: Can Delete Qualification\Units 4: Can Delete Qualification Registrations 5: Can edit Registration Date 6: Can manage users	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	1: Can Delete Learner 2: Can Add Qualifications\Units 3: Can Delete Qualification\Units 4: Can Delete Qualification Registrations 5: Can edit Registration Date 6: No access to User Manager	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	1: Can see all aspects of data but cannot undertake any action within the system. i.e. register a Learner, Create a Certificate. 2: No access to User Manager	1: Cannot be in this Role and in Users

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

2.4 Confirmation of User Account Creation



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

2.5 Edit/Maintain Current Users

Username	Email	Mobile Number	Last login Date	Roles	Centre Code	Centre Name	Two Factor Enabled	Two Factor Method
av	Type to filter	Type to filter	Type to filter	Type to filter	Exact match	Type to filter	Type to filter	Type to filter
avcentre	avm@gordonassociates.co.uk		03/Apr/2023 12:48	Centres	9993	Auto Test Centre Four (Generated by a...	false	Not Chosen
avcentreUtl	ace_av@hotmail.com		31/Jul/2023 12:10	Centres_CentreUserManager	1468	Avul Centre for Excellence	false	Not Chosen

Once Users are created you can maintain their details searching for them using one of the filter boxes eg Username and then by clicking on the user, which opens the User Manager screen, as below.

2.6 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.

Workflows Centres Venues Learners Qualification

User Manager

User Name:

Locked Out:

Enabled:

Online:

Comment:

Creation:

Last Activity:

Last Login:

Roles:

- Admin
- BypassCourseValidation
- Centres
- CentreServiceLayer
- EV
- Examiner
- ExamsPowerUser
- ExamsUser
- Finance
- ISTDUser
- QAPowerUser
- QAUUser
- Supervisor
- Teacher
- Users

Associated Contact:

Associated Centre:

Edit User
Close
Reset Password
Delete
Disable User

2.7 Deleting Users

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

The screenshot shows the 'User Manager' interface for a user named 'AvriAdmin'. The user's details are as follows:

- User Name: AvriAdmin
- Creation: 05/02/2019
- Locked Out: No
- Last Activity: 04/03/2019
- Online: False
- Last Login: 04/03/2019
- Comment: (empty field)
- Roles:
 - Admin
 - BypassCourseValidation
 - Centres
 - EV
 - Examiner
 - ExamsPowerUser
 - ExamsUser
 - Finance
 - ISTDUser
 - QAPowerUser
 - QAUser
 - Supervisor
 - Teacher
 - Users
- Associated Contact: None
- Associated Centre: None

At the bottom of the form, there are four buttons: 'Edit User', 'Close', 'Reset Password', and 'Delete'. The 'Delete' button is highlighted in yellow.

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).

2.8 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 → 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

User Name: Created:

Locked Out: Last Activity:

Enabled: Last Login:

Online:

Comment:

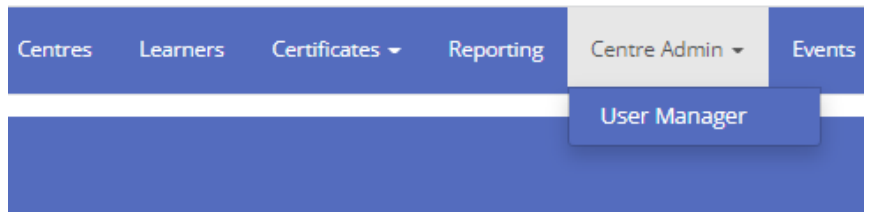
Roles:

- Admin
- BypassCourseValidation
- Centres
- CentreServiceLayer
- CentreUserManager
- EV
- Examiner
- ExamsPowerUser
- ExamsUser
- Finance
- ISTDUser
- QAPowerUser
- QAUser
- Supervisor
- Teacher
- Users

Associated Contact:

Associated Centre:

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



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 Manager

Show 10 entries

Username	Email	Mobile Number	Last login Date	Roles	Centre Code	Centre Name
<input type="text" value="Type to filter"/>	<input type="text" value="Type to filter"/>	<input type="text" value="Type to filter"/>	<input type="text" value="Type to filter"/>	<input type="text" value="Type to filter"/>	<input type="text" value="Exact match"/>	<input type="text" value="Type to filter"/>
avcentre	avril@gordonassociates.co.uk		03/Apr/2023 12:48	Centres ,CentreUser-Manager	9993	Auto Test: Centre Four (Generated by 'a...

They can add a user as below

Centre User Manager

Add User

User Name:

Email:

Password (Optional):

Associated Centre:

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 Centres

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

Centre User Manager

User Name: Created:

Locked Out: Last Activity:

Enabled: Last Login:

Online:

Comment:

Roles: Centres Associated Contact:

Associated Centre:

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: Associated Centre:

Email: Associated Contact:

Reset Password To: Associated Sites:

Comment: Roles* Centres

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

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.

3 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.

Number	First Name	Last Name	Gender	DOB	Created
134396	Matt aa test	matt aa test	Male	01/01/1981	23/08/2017 10:10:32
134395	acron	glos	Male	15/10/1979	15/08/2017 09:18:36
134394	wheres	mapathway	Female	21/06/1988	31/07/2017 09:59:22
134393	Early	Assess	Male	23/04/1988	27/07/2017 11:55:32
134392	regdate	quickgrade	Male	22/05/1988	27/07/2017 11:14:27
134391	Mitchell	Rood	Female	01/01/1980	20/07/2017 10:58:07
134390	Roger	Cartwright	Male	05/05/1977	20/07/2017 12:38:32
134389	Katy	Cleaver	Female	05/05/1977	20/07/2017 12:38:32
134388	Ron	Dadoo	Male	07/08/1980	20/07/2017 12:17:59
134387	May	Spring	Female	04/08/1980	20/07/2017 12:17:59

Figure 3-1 : 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.

3.1 Menu Options Available

Centres	<p>Centre maintenance, this includes :-</p> <ul style="list-style-type: none"> • Adding, Editing and Deleting Centres • Search for Centres • Manage Centre Sites • Manage Centre Contacts
Learners	<p>Learner maintenance, this includes :-</p> <ul style="list-style-type: none"> • Adding, Editing and Deleting Learners • Search for Learners • Manage Learner Registrations • View a Learner's Certificates • Enter a Learner's Grades • Reprint Certificates • Print Duplicate Certificates • Add notes for a learner
Qualifications	<p>Qualification maintenance;</p> <ul style="list-style-type: none"> • Adding, Editing and Deleting Qualifications • Manage Units and their Groups at a Qualification level • Manage Pathways • Add notes for a qualification
Qualification Sets	<p>Qualification Set maintenance, from here all functionality for the maintenance of Qualification Sets within Parnassus is carried out.</p>
Units	<p>From here you can manage Units at a global level without the need to go into a Qualification.</p>
Certificates	<p>Manage certification, including creating Batches and printing them off.</p>
Reporting	<p>Access Reports setup within your Parnassus application.</p>
Facilitators	<p>Access Facilitators setup within your Parnassus application. These may be instructors, teachers, assessors or examiners.</p>
Events	<p>The Events area allows you to define courses for a particular qualification, including the location/centre, course dates, facilitators etc.</p>
Contacts	<p>Contact maintenance</p>

5 Centre Maintenance

5.1 Centres

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 statuses 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;

The screenshot displays the 'Centre Search' interface. At the top, there is a navigation menu with options like Workflows, Centres, Venues, Learners, Qualification, Certificates, Reporting, Contacts, GA Admin, Admin, and Events. Below the navigation, there is a search bar with the text 'user' and a 'Search' button. To the right of the search bar is an 'Actions' section with a green 'Add Centre' button. Below the search bar, there is a table with two sections: 'Site' and 'Centre'. The 'Site' section shows one result for 'Example Site For User Guide' with site code 1277.001, status Pending, main site Yes, and telephone. The 'Centre' section shows one result for 'Example Centre For User Guide' with centre code 1277, status Pending, first approved, and telephone. A sidebar on the right shows 'Your Recent Activity' with a list of recent actions.

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)

- 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.

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.

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	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; <ul style="list-style-type: none"> Edit Centre Details Change Centre Status Change Fee Percentages Add Site The following sections detailing each of these functions.
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

5.4.1. 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.

PUG2019 Centre01 (1310)
Centre Home | Contacts | Venues | Centre Notes | Documents

Centre Code 1310	Centre Status Approved	Old Code not supplied	UKPRN not supplied	First Approved 18 Sep 2019	UCN not supplied
Renewal Date n/a	Date Closed n/a	Renewal Status New Centre	Default Assessment Language English	Main Site Telephone not supplied	
Main Site Email not supplied		Main Site Website not supplied			Risk Rating Not Set
Main Site Address UNITED KINGDOM					

Groups

Group 1	Group 2
---------	---------

Sites

Site Name PUG2019 Site01	Site Code 1310.001	Site Status Approved
-----------------------------	-----------------------	-------------------------

Actions

- Edit Centre Details
- Change Centre Status
- Change Fee Percentages
- Add Site
- View Process Audit

Your Recent Activity

- Centre: PUG2019 Centre01 (1310) Pin
- Centre: Auto Test Centre One (Generated by 'auto' testing scripts) (9990) Pin
- Contact: Test McTest (355) Pin
- Site: Can See This (1302.003) Pin
- Site: Not allowed to see (1302.002) Pin

5.4.2. 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.

Example Centre For User Guide (1277)
Centre Home | Contacts | Venues | Centre Notes

Centre Code 1277	Centre Status Pending	Old Code not supplied	UKPRN not supplied	First Approved n/a	UCN not supplied
Renewal Date n/a	Date Closed n/a	Renewal Status New Centre	Default Assessment Language English	Main Site Telephone not supplied	
Main Site Email not supplied		Main Site Website not supplied			Risk Rating Not Set
Main Site Address UNITED KINGDOM					

Sites

Site Name Example Site For User Guide	Site Code 1277.001	Site Status Pending
--	-----------------------	------------------------

Actions

- Edit Centre Details
- Change Centre Status
- Change Fee Percentages
- Add Site
- View Process Audit

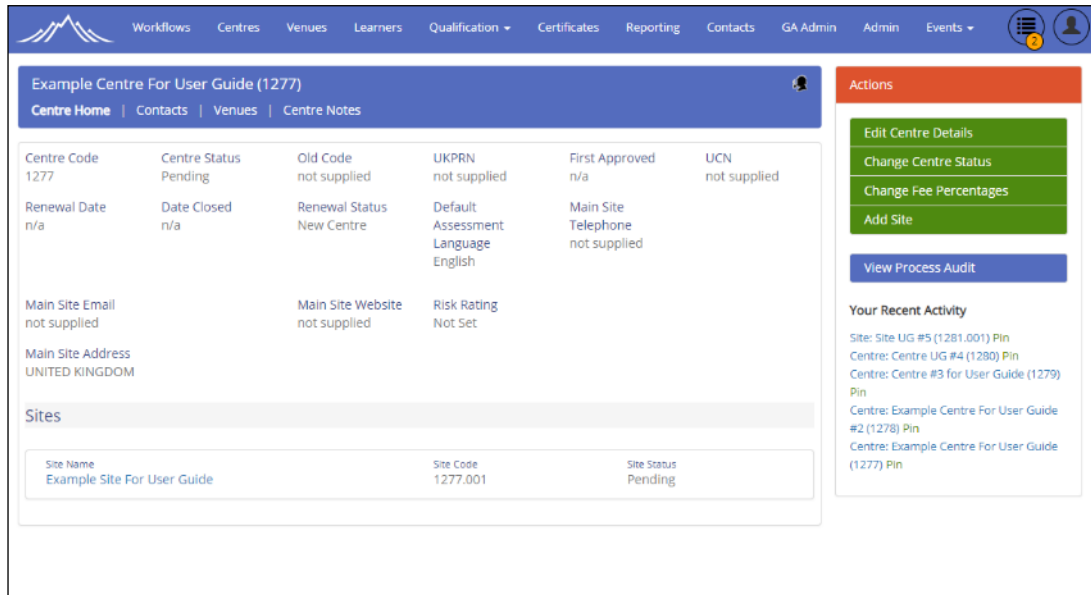
Your Recent Activity

- 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 (1277) Pin

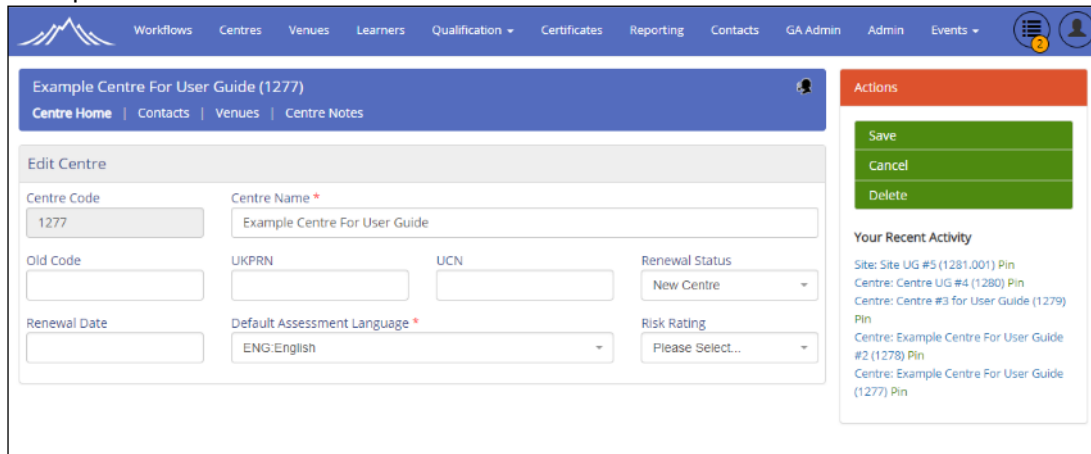
Use the Edit Centre Details option to open the edit screen. Once you have updated the Centre details the options on the Edit Centre screen are Save, Cancel and Delete.

5.4.3. 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.



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



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

5.4.4. 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.

Example Centre For User Guide (1277)
 Centre Home | Contacts | Venues | Centre Notes

Centre Code 1277	Centre Status Pending	Old Code not supplied	UKPRN not supplied	First Approved n/a	UCN not supplied
Renewal Date n/a	Date Closed n/a	Renewal Status New Centre	Default Assessment Language English	Main Site Telephone not supplied	
Main Site Email not supplied		Main Site Website not supplied	Risk Rating Not Set		
Main Site Address UNITED KINGDOM					

Sites

Site Name	Site Code	Site Status
Example Site For User Guide	1277.001	Pending

Actions

- Edit Centre Details
- Change Centre Status
- Change Fee Percentages
- Add Site
- View Process Audit

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 (1277) Pin

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

Example Centre For User Guide (1277)
 Centre Home | Contacts | Venues | Centre Notes

Update Centre Status

Status	Date First Approved	Date Closed
Pending		

Actions

- Set to Approved
- Record Closure
- Set to Rejected
- Close

Your Recent Activity

- Centre: Example Centre For User Guide (1277) Pin
- Site: Example Site For User Guide (1277.001) Pin
- Site: Site UG #5 (1281.001) Pin
- Centre: Centre UG #4 (1280) Pin
- Centre: Centre #3 for User Guide (1279) Pin

Cntd ...

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 additional 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	User is prompted; <ul style="list-style-type: none"> • Suspend • Suspend for Registration • Suspend for Certification 	Yes if not suspended for registration	Yes if not suspended for certification
Withdraw		No	Yes
Record Closure		No	No
Remove Suspensions		Dependant on status chosen	Dependant on status chosen
Set to Pending		No	No
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.

5.4.5. 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

5.4.6. 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)
👤

Centre Home
Contacts
Venues
Centre Notes 2

Centre Code 1277	Centre Status Withdrawn	Old Code not supplied	UKPRN not supplied	First Approved 31 Aug 2018	UCN not supplied
Renewal Date n/a	Date Closed n/a	Renewal Status New Centre	Default Assessment Language English	Main Site Telephone not supplied	
Main Site Email not supplied		Main Site Website not supplied	Risk Rating Not Set		
Main Site Address UNITED KINGDOM					

Sites

Site Name Example Centre for User Guide - Site 01	Site Code 1277.001	Site Status Approved
Site Name Example Centre for User Guide - Site 02	Site Code 1277.002	Site Status Approved

Actions

- Edit Centre Details
- Change Centre Status
- Change Fee Percentages
- Add Site
- View Process Audit

Your Recent Activity

Site: Auto Test Four Site One (9993.001) Pin

Centre: Auto Test Centre Four (Generated by 'auto' testing scripts) (9993) Pin

Site: Example Centre for User Guide - Site 02 (1277.002) Pin

Centre: Example Centre For User Guide (1277) Pin

Site: Example Centre for User Guide - Site 01 (1277.001) Pin

Pinned Activities

Site: Example Centre for User Guide - Site 01 (1277.001) Unpin

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

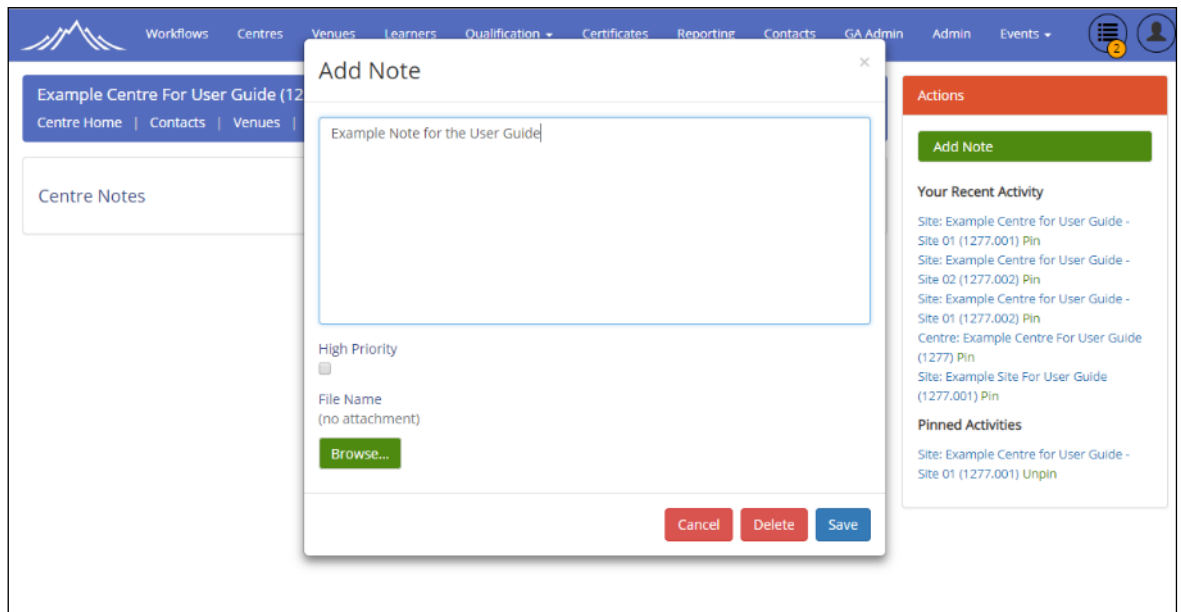
You can add a New Venue or associate an existing Venue with a Centre.

See the main Venues section for further information on Venues.

The screenshot shows a web application interface for a centre. At the top, a blue navigation bar contains the text 'Example Centre For User Guide (1277)' and links for 'Centre Home', 'Contacts', 'Venues', and 'Centre Notes'. Below this, the main content area is titled 'Venues at this Centre' and features a search input field with a 'Search' button. A message below the search field states 'Your search criteria did not return any results'. To the right, an 'Actions' sidebar is visible, containing two green buttons: 'Add Existing Venue' and 'Add New Venue'. Below these buttons, the sidebar lists 'Your Recent Activity' and 'Pinned Activities' with several entries, each including a site name and a pin ID.

5.7 Centre Notes

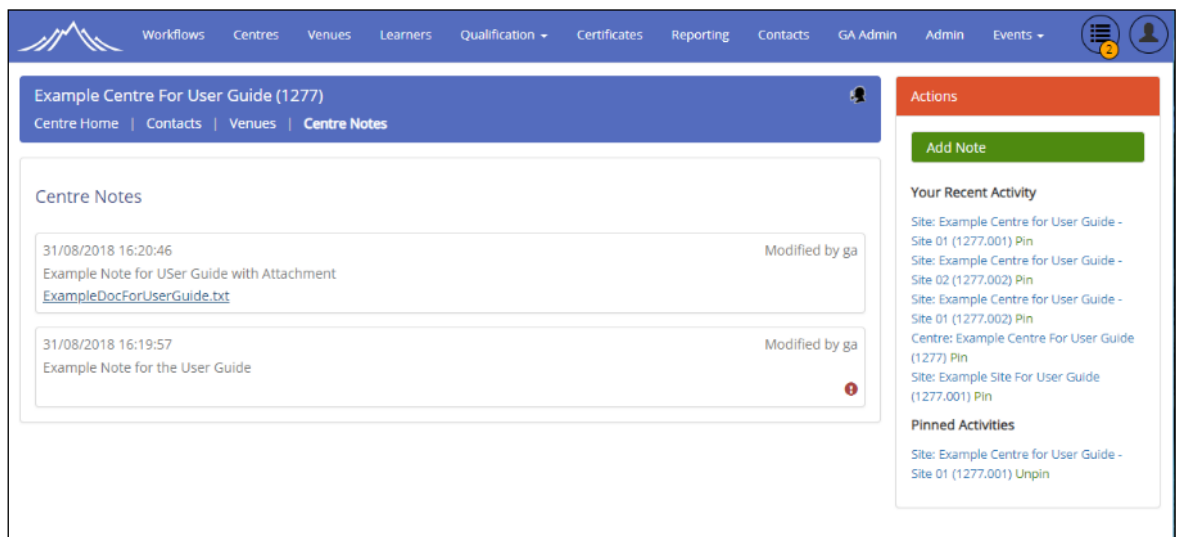
From Centre Home you can add Notes for a Centre.
 You can also attach a document with the Note.
 And flag the Note as High Priority to highlight it if required.



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.



5.8 Sites

5.8.1.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.

5.8.2.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.

The screenshot shows the 'Centre Search' page with a search bar containing 'User' and a 'Search' button. Below the search bar, there are 5 results found. The results are categorized into Centres and Sites. Each result shows details such as Centre Code, Centre Status, First Approved, Telephone, and Address. The 'Example Centre for User Guide - Site 01' is highlighted as the selected record.

Centre Code	Centre Status	First Approved	Telephone
1279	Approved	31 Aug 2018	
Site Example Centre for User Guide - Site 01			
Site Code	Site Status	Main Site	Telephone
1277.001	Approved	Yes	
Address , UNITED KINGDOM			
centre Name Example Centre For User Guide			
Centre Example Centre For User Guide			
Centre Code	Centre Status	First Approved	Telephone
1277	Withdrawn	31 Aug 2018	
Address , UNITED KINGDOM			
Site Example Centre for User Guide - Site 02			
Site Code	Site Status	Main Site	Telephone
1277.002	Approved	No	
Address , UNITED KINGDOM			
centre Name Example Centre For User Guide			

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.

The screenshot shows the 'Example Centre For User Guide (1277)' page. It includes a navigation bar with 'Centre Home', 'Contacts', 'Venues', and 'Centre Notes'. The main content area displays details for the Centre, including Centre Code, Centre Status, Old Code, UKPRN, First Approved, UCN, Renewal Date, Date Closed, Renewal Status, Default Assessment Language, Main Site Telephone, Main Site Email, Main Site Website, and Risk Rating. Below this, there is a 'Sites' section listing two sites with their Site Name, Site Code, and Site Status.

Centre Code	Centre Status	Old Code	UKPRN	First Approved	UCN
1277	Withdrawn	not supplied	not supplied	31 Aug 2018	not supplied
Renewal Date	Date Closed	Renewal Status	Default Assessment Language	Main Site Telephone	
n/a	n/a	New Centre	English	not supplied	
Main Site Email		Main Site Website	Risk Rating		
not supplied		not supplied	Not Set		
Main Site Address UNITED KINGDOM					
Sites					
Site Name		Site Code	Site Status		
Example Centre for User Guide - Site 01		1277.001	Approved		
Site Name		Site Code	Site Status		
Example Centre for User Guide - Site 02		1277.002	Approved		

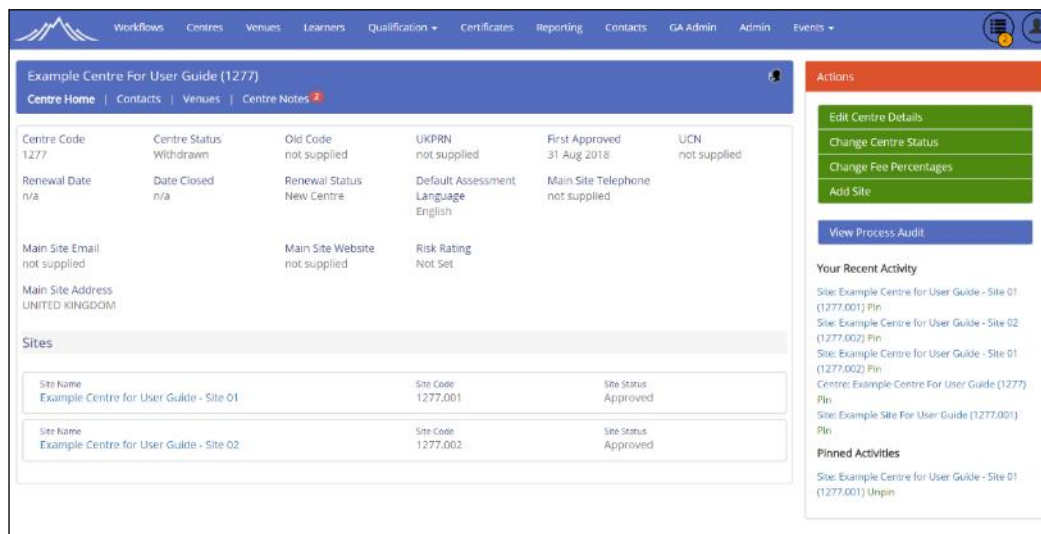
Alternatively select the Site directly from the search page and open the Site Details page directly.

5.8.3.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.



5.9 Site Details

5.9.1. Site Home (View Site)

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

Auto Test Centre Four (Generated by 'auto' testing scripts) (9993)
 Auto Test Four Site One (9993.001)

Site Home | Contacts | Qualifications | Qualification Sets | Unit DCS | Site Notes

Site Code 9993.001	Site Status Approved	Function Registration	Site Type not supplied	Telephone not supplied	Main Site Yes
Email not supplied	Website not supplied		Assessment Language English		
Address UNITED KINGDOM				Regulator Region not supplied	
Centre Code 9993	Centre Status Approved	Centre Name Auto Test Centre Four (Generated by 'auto' testing scripts)			
Mandatory PO No	Is for private study No	Account Number	AO Category not supplied	AO Country not supplied	AO Region not supplied
eCertification Email not supplied					
Certificate Site Name					
Registration Pre-payment Required No					

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	The purpose of the site, the options will be: <ul style="list-style-type: none"> • Test • Registration • Registration & Test 	Mandatory: must be one of the selectable values
Site Type	The type of the site, the options will be: <ul style="list-style-type: none"> • School • FE College / Tertiary College • Sixth Form College • Adult Education Centre • University or other HE Centre • Private Training Provider • Local Government / Central Government / NHS • Voluntary Organisation • Employer • HM Prison / Youth Offenders Institution • Armed Forces • Overseas Centre • Other 	Optional: may be 'None' or one of the selectable values
Telephone	Primary phone number of the site	No Validation

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 – this field must be populated for the site to be included in the Ofqual report data. The list is as per Ofqual.	Optional but Mandatory where the site is to be included in data for the Ofqual report
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
Registration Pre-payment Required	When this is ticked registrations are held in the middle stage until an AO user has confirmed payment is received.	Optional

5.9.2.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.

👤
Excellence Centre (1442)
 Site 1 (1442.001)

[Site Home](#) | [Contacts](#) | [Qualifications](#) | [Qualification 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.uk		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 Import	eCertification Email				
No	avril@gordonassociates.co.uk				
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 (1277)
 Example Centre for User Guide - Site 01 (1277.001)

[Site Home](#) | [Contacts](#) | [Qualifications](#) | [Qualification Sets](#) | [Site Notes](#)

Edit Site

Site Name *
 Example Centre for User Guide - Site 01

Default Assessment Language
Use Parents Default

Site Type
01 - School

Web Site

Regulator Region
Not Supplied

AO Country
Not Supplied

AO Category
Not Supplied

Address

Street 1

Street 2

Street 3

Site Function
Registration

Email

Acc. No.

Mandatory PO

Is for Private Study

Prevent Registrations Direct Import

AO Region
Not Supplied

City/Town

Actions

[Save](#)

[Cancel](#)

[Delete](#)

Your Recent Activity

Centre: Example Centre For User Guide (1277) Pin

Centre: Centre #3 for User Guide (1279) Pin

Contact: Timmy Jenkins (334) Pin

Centre: Auto Test Centre Four (Generated by 'auto' testing scripts) (9993) Pin

Site: Example Centre for User Guide - Site 01 (1277.001) Pin

Pinned Activities

Site: Example Centre for User Guide - Site 01 (1277.001)

Unpin

5.9.3. 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 Centre (1442)
Site 1 (1442.001)
Site Home | Contacts | Qualifications | Qualification Sets | Unix DCS | Site Notes

Site Code 1442.001	Site Status Approved	Function Registration	Site Type 01 - School	Telephone not supplied	Main Site Yes
Email avn1@gordonassociates.co.uk	Website not supplied	Assessment Language English	Regulator Region not supplied		
Address UNITED KINGDOM					
Centre Code 1442	Centre Status Approved	Centre Name Excellence Centre			

Actions

- Edit Site Details
- Assign Qualifications
- Assign Qualification Sets
- Change Site Status
- View Process Audit

Your Recent Activity

- Centre: Excellence Centre (1442) Pin
- Site: Site 1 (1442.001) Pin

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

Example Centre For User Guide (1277)
Example Centre for User Guide - Site 01 (1277.001)
Site Home | Contacts | Qualifications | Qualification Sets | Site Notes

Edit Site

Site Code: 1277.001 | Site Name: Example Centre for User Guide - Site 01

Default Assessment Language: Use Parents Default | Site Function: Registration

Site Type: 01 - School | Email: []

Web Site: [] | Acc. No.: []

Regulator Region: Not Supplied | Mandatory PO: [] | Is for Private Study: []

Prevent Registrations Direct Import: []

AO Country: Not Supplied | AO Region: Not Supplied

AO Category: Not Supplied

Address: Street 1, Street 2, Street 3, City/Town

Actions

- Save
- Cancel
- Delete

Your Recent Activity

- Centre: Example Centre For User Guide (1277) Pin
- Centre: Centre #3 for User Guide (1279) Pin
- Contact: timmy jenkins (334) Pin
- Centre: Auto Test Centre Four (Generated by 'auto' testing script) (9993) Pin
- Site: Example Centre for User Guide - Site 01 (1277.001) Pin

Pinned Activities

- Site: Example Centre for User Guide - Site 01 (1277.001) Unpin

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

5.9.4.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.

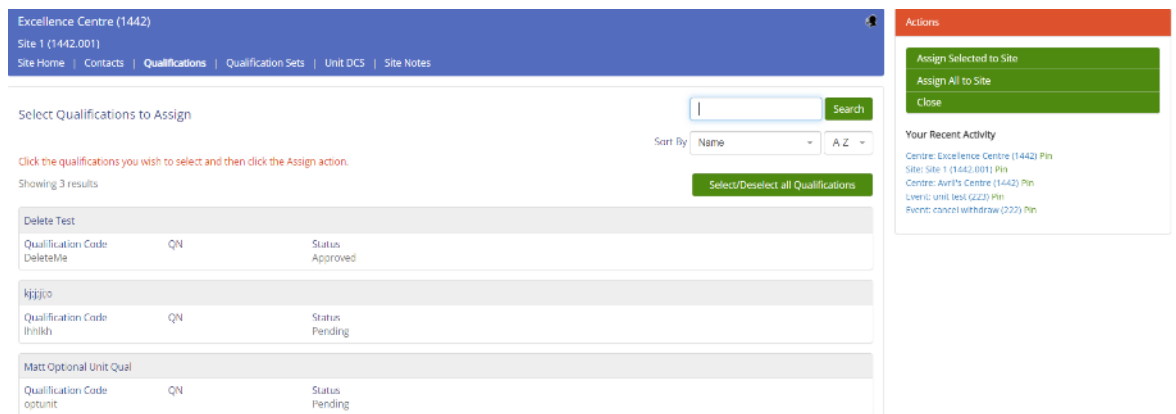
Or

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.

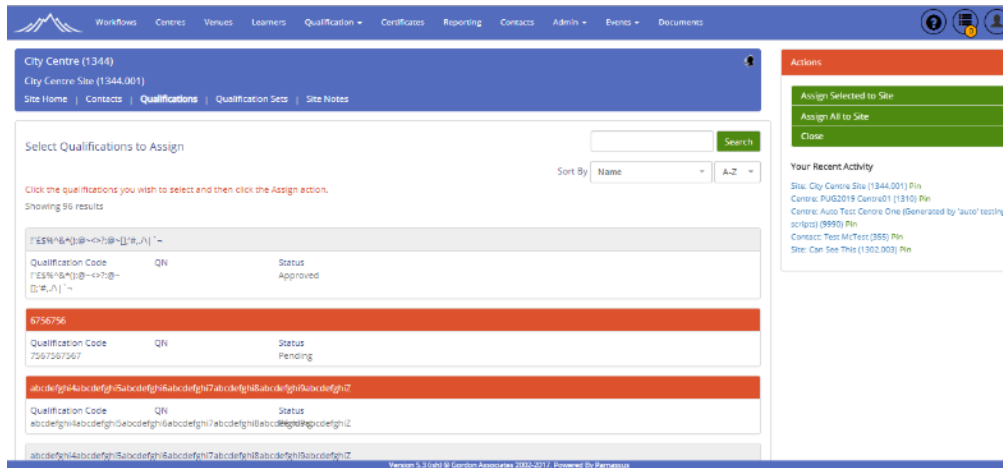


The Assign Qualification screen shows a list of all the Qualifications in Parnassus that are currently not assigned to the Site. You can select specific qualifications or you can assign all of the available qualifications to the site.

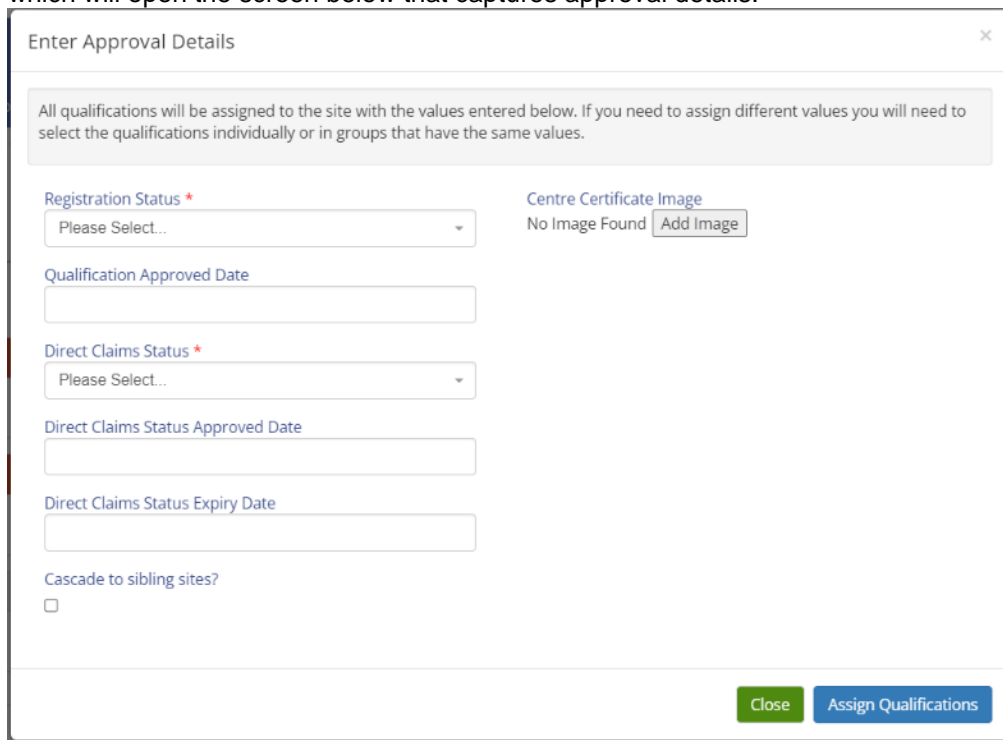


Use the Search option to reduce the list of Qualifications and help find qualifications if you need to. The search works on Qualification code and title and is wildcarded automatically.

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.



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



If you wish to add a qualification to all the sites at a centre you can tick the cascade box – this action may take a while to complete if you have many sites – there is a 30 minute maximum limit set for this in cases where there are more than 1400 sites.

The screenshot shows a portion of a web form. It includes two text input fields: 'Direct Claims Status Approved Date' and 'Direct Claims Status Expiry Date'. Below these is a checkbox labeled 'Cascade to sibling sites?' which is checked. The 'Cascade to sibling sites?' label is highlighted in yellow.

The table below describes the fields on the screen above;

Registration Status	The status of the qualification at this site, see “ <i>Centre, Site, Qualification Status Values</i> ” for details	Mandatory: must be one of the selectable values
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: <ul style="list-style-type: none"> • 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 Expiry Date	The date of expiry after which the DCS is unavailable.	Optional
Cascade to Sibling Sites	If you want to assign the Qualification(s) to all the Sites at the Centre tick this option.	Optional

5.9.5. Site Actions – Edit Site Qualification(s)

The screens to Edit Site Qualifications(s) can be opened in 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 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 (1277)
👤

Example Centre for User Guide - Site 01 (1277.001)

Site Home | Contacts | Qualifications | Qualification Sets | Site Notes

Site Code 1277.001	Site Status Approved	Function Registration	Site Type 01 - School	Telephone not supplied	Main Site Yes
Email not supplied		Website not supplied		Assessment Language English	
Address UNITED KINGDOM				Regulator Region not supplied	
Centre Code 1277	Centre Status Withdrawn	Centre Name Example Centre For User Guide			
Mandatory PO No	Is for private study No	Account Number	AO Category not supplied	AO Country not supplied	AO Region not supplied
Prevent Direct Registration Import No					

Qualifications active for registration (Show all site qualifications)

Qualification Title Qual for User Guide 01 - GH Approval Date 28 Sep 2018	Qualification Code UG01-GH	Status Approved
Direct Claims Status Approved		
Qualification Title Testing Qualification 1 : NQF - (1 pathway, 2 groups, Pass/Fail - Generated by 'auto' testing scripts)	Qualification Code ALITOTESTQUAL1	Status Approved
Approval Date 31 Aug 2018		Direct Claims Status Suspended

This will open the Edit Site Qualification Screen as below.

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.

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

5.9.6.Site Actions – Assign Qualification Set

Qualification Sets are assigned to Sites rather than Centres in Parnassus

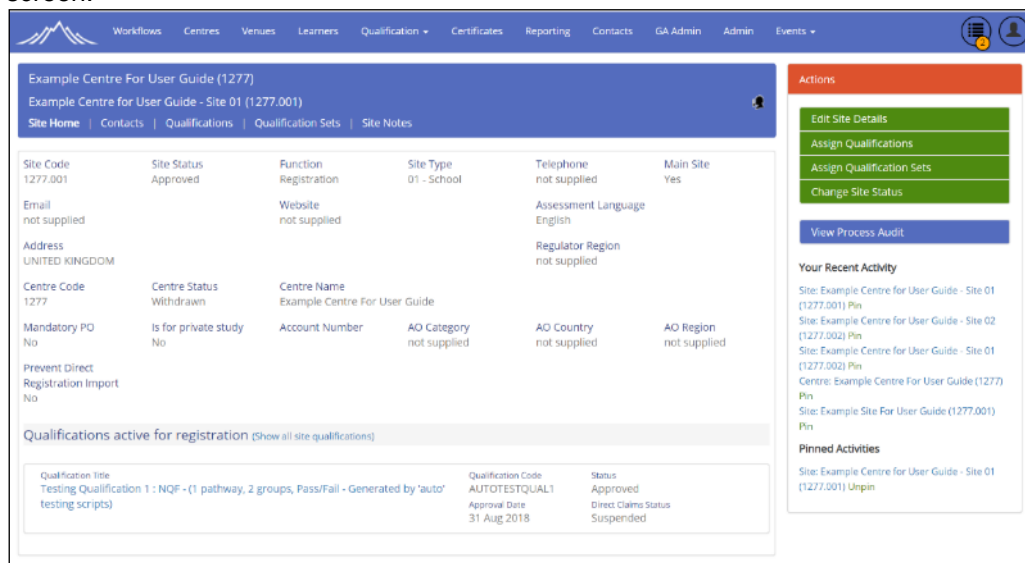
The screens to do this can be accessed two ways;

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.

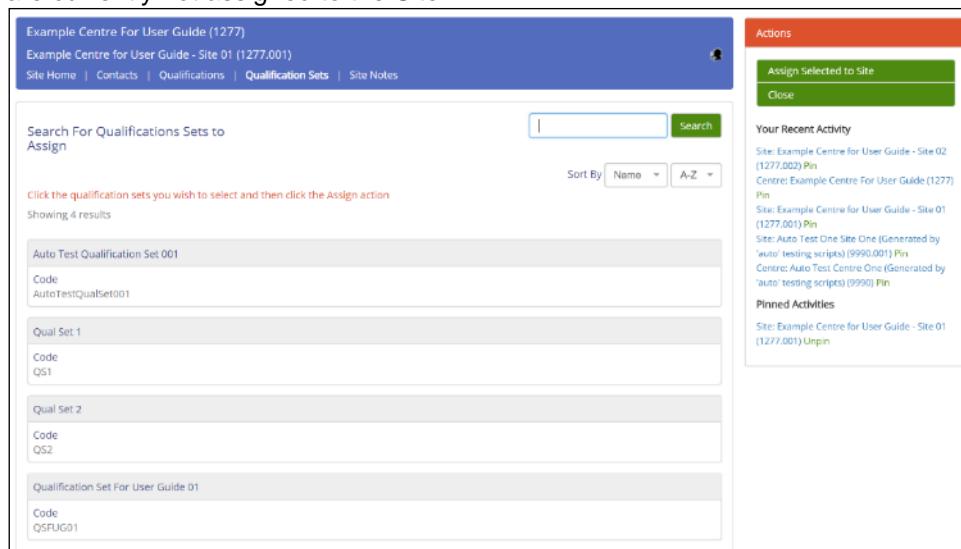
Or

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.

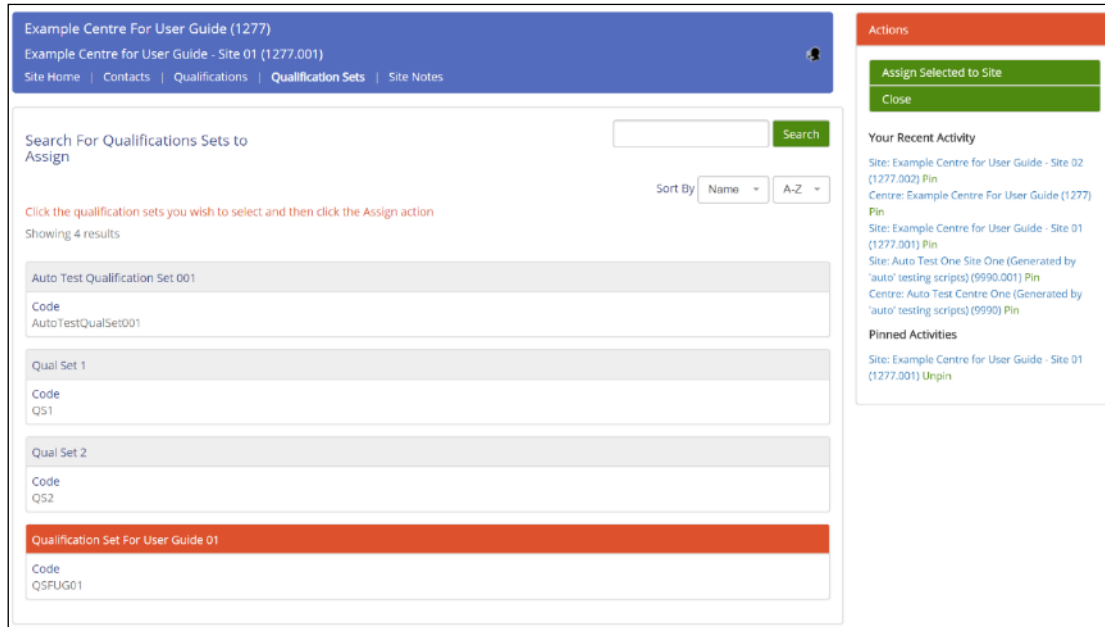


The Assign Qualification Set screen shows a list of all the Qualifications in Parnassus that are currently not assigned to the Site.

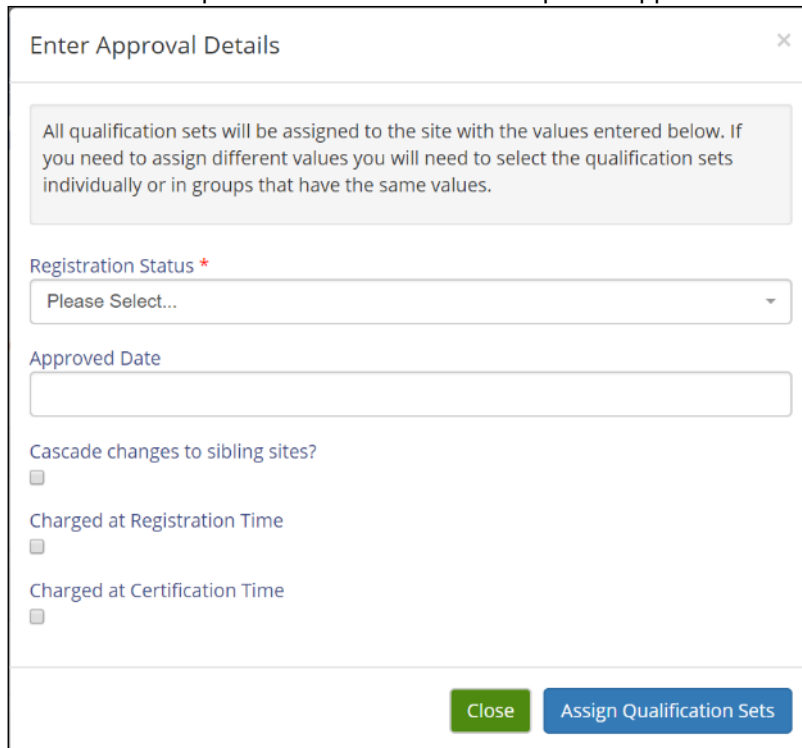


Use the Search option to reduce the list of Qualification Sets and help find Qualification Sets if you need to. The search works on Qualification Set code and Title, and is wildcarded automatically.

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.



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.



The table below describes the fields on the screen above;

Registration Status	The status of the qualification set at this site, see " <i>Centre, Site, 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. A percentage of the fee can be raised 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
Charged at Certification Time	For installations that use the Link To Finance module, HERMES, this options determines when the fee is raised. A percentage of the fee can be raised 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

5.9.7.Site Actions – Edit Site Qualification Set

See the section Site Qualification Sets

5.9.9.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.

The screenshot shows the 'Example Centre For User Guide (1277)' site details page. The 'Actions' panel on the right contains the following options:

- Edit Site Details
- Assign Qualifications
- Assign Qualification Sets
- Change Site Status**
- View Process Audit

Below the 'Change Site Status' button, there is a 'Your Recent Activity' section listing several site-related actions with 'Pin' options.

Clicking the option 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.

The screenshot shows the 'Update Site Status' screen for the 'Example Centre For User Guide (1277)'. The 'Actions' panel on the right contains the following options:

- Set to Approved
- Suspend
- Withdraw
- Record Closure
- Set to Pending
- Close

Below the 'Close' button, there is a 'Your Recent Activity' section listing several site-related actions with 'Pin' options.

You will be prompted for various 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!

5.9.10. 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.

5.9.11. Site Qualifications

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

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.

Use *Assign Additional 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)*.

Example Centre For User Guide (1277)
Example Centre for User Guide - Site 01 (1277.001)

Site Home | Contacts | **Qualifications** | Qualification Sets | Site Notes

Site Qualifications

Showing 4 results

Qualification Code	QN	Status	Direct Claims Status	Approval Date
Qual for User Guide 01 - GH				
UG01-GH		Approved	Approved	28 Sep 2018
Testing Qualification 1 : NQF - (1 pathway, 2 groups, Pass/Fail - Generated by 'auto' testing scripts)				
AUTOTESTQUAL1	500/6804/0	Approved	Suspended	31 Aug 2018
Testing Qualification 4 : QCF - (2 pathway, 2 groups, ABCD - Generated by 'auto' testing scripts)				
AUTOTESTQUAL4		Approved	None	21 Sep 2018
Testing Qualification 6 : QCF with Elements - (Generated by 'auto' testing scripts)				
AUTOTESTQUAL6		Approved	None	21 Sep 2018

Actions

Assign Additional Qualifications

Your Recent Activity

- Centre: Auto Test Centre Four (Generated by 'auto' testing scripts) (9993) Pin
- Site: Example Centre for User Guide - Site 02 (1277.002) Pin
- Centre: Example Centre For User Guide (1277) Pin
- 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

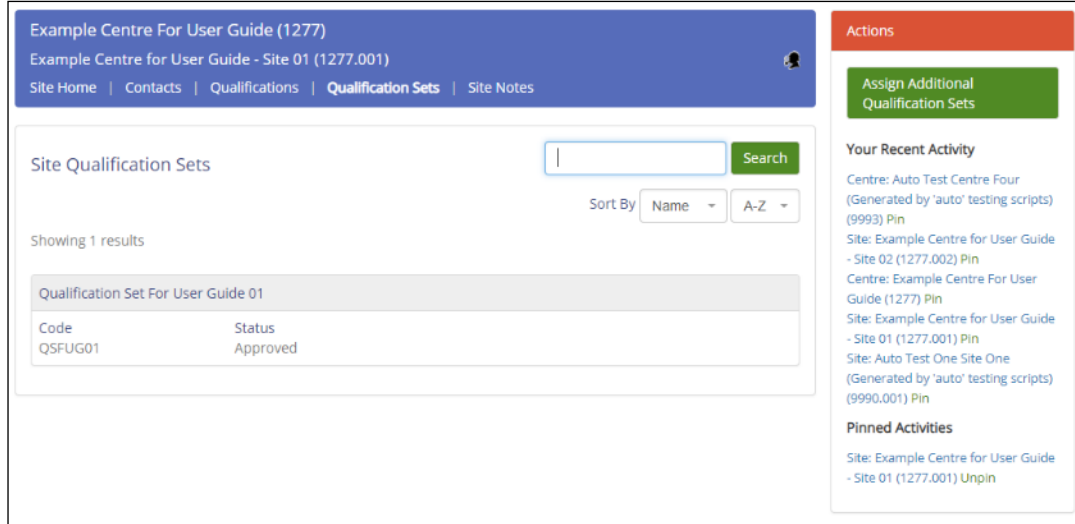
- Site: Example Centre for User Guide - Site 01 (1277.001) Unpin

5.9.12. Site QualificationSets

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

Use the Search option 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 Additional Qualifications* to add more Qualifications to the Site.



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.



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.

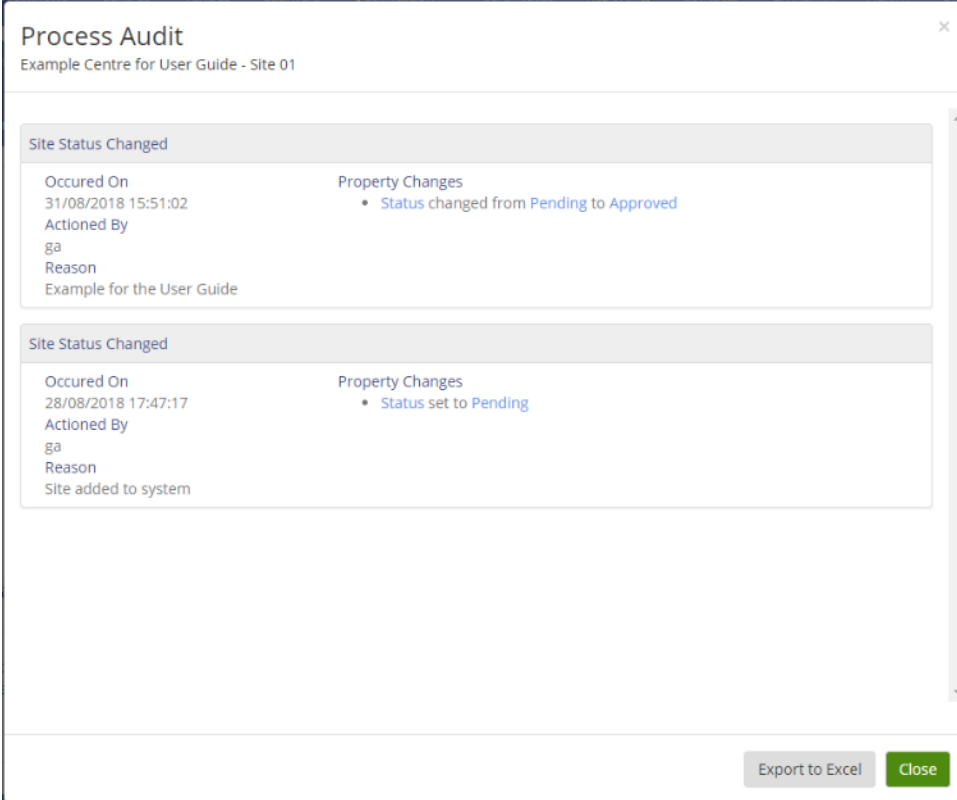


5.11 Process Audit

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.

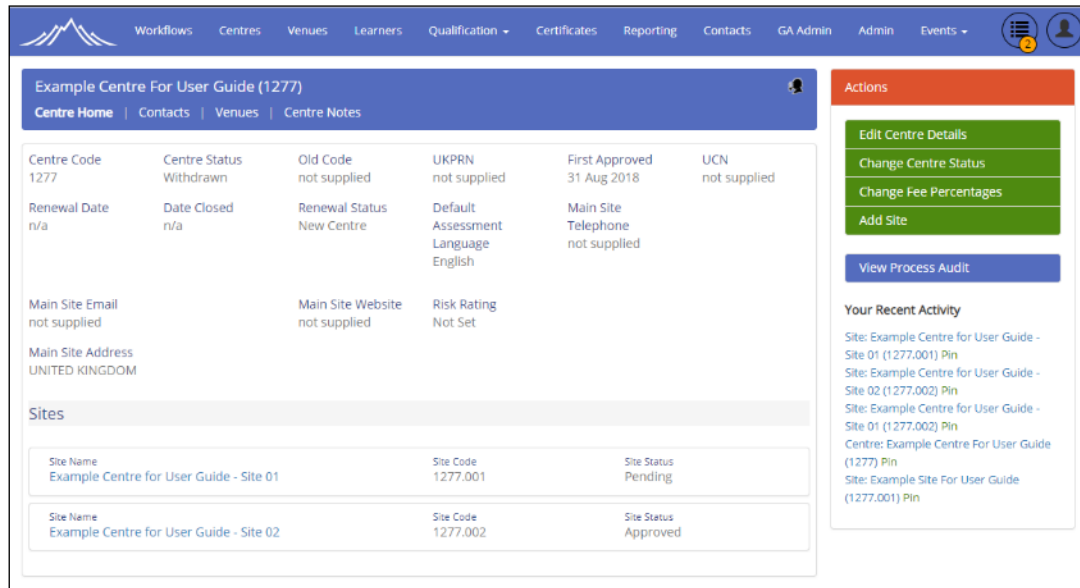


The screenshot displays a window titled "Process Audit" for "Example Centre for User Guide - Site 01". It contains two entries for "Site Status Changed":

Occured On	Actioned By	Reason	Property Changes
31/08/2018 15:51:02	ga	Example for the User Guide	<ul style="list-style-type: none">• Status changed from Pending to Approved
28/08/2018 17:47:17	ga	Site added to system	<ul style="list-style-type: none">• Status set to Pending

At the bottom right of the window, there are two buttons: "Export to Excel" and "Close".

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.



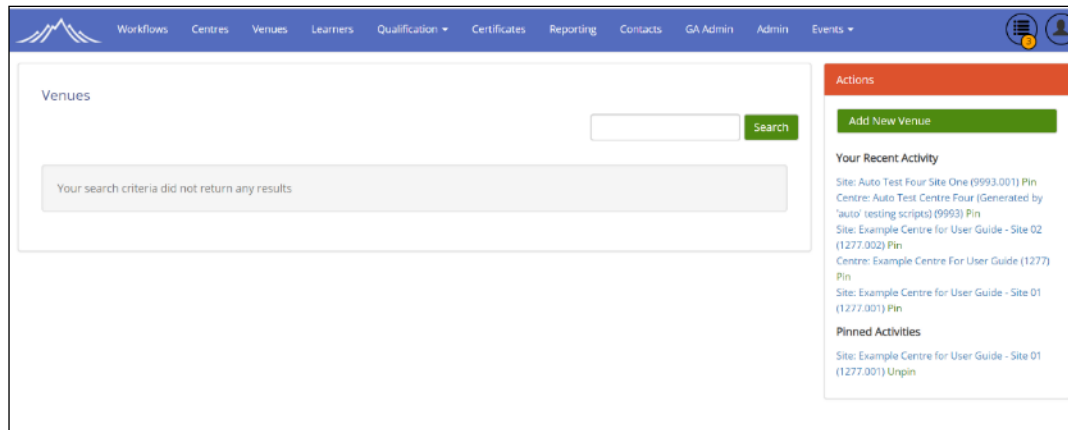
The table below summarises where the Process Audit can be viewed from.

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	Records changes to; <ul style="list-style-type: none"> • Status • Approval Date • Direct Claim Status • DCS Approval Date
Qualification Status	Qualification	The button is called "View Status History" Records changes to; <ul style="list-style-type: none"> • Qual Status • Qual Approval Date The screen requests reason for change to be entered by the User.
Qualification Set Assignment (to Site)	Edit Site Qualification set	Records changes to; <ul style="list-style-type: none"> • Status • Approval Date • Charged at Registration • Charged at Certification

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.



6.1.1. Add Venue

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.

For additional guidance you can view our video:

[Quick start guide to learner management](#)

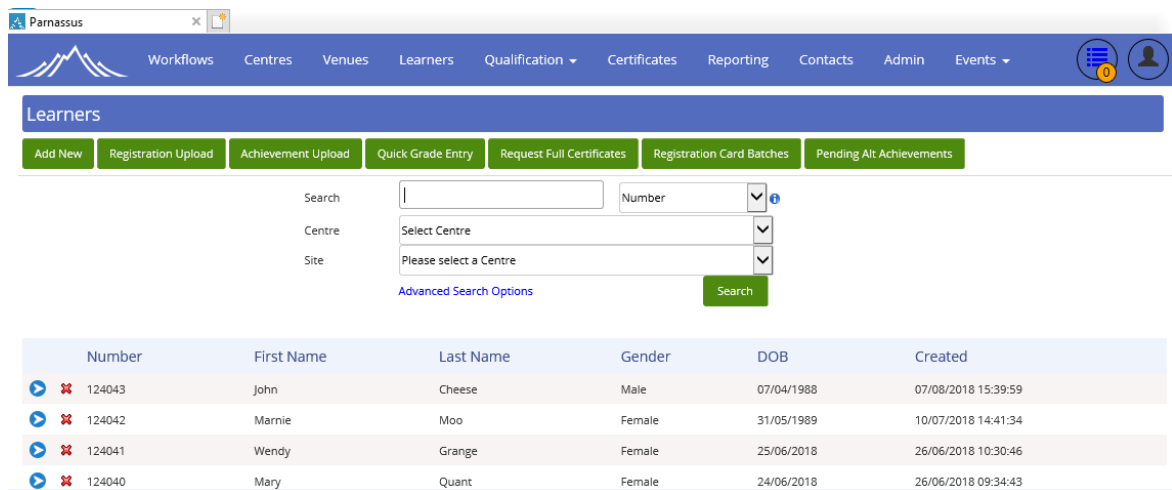


Figure 7-1 : Learners maintenance page

Buttons available are

Button	Purpose
Add New	Add new Learner. See section 7.1.7.
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.

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.

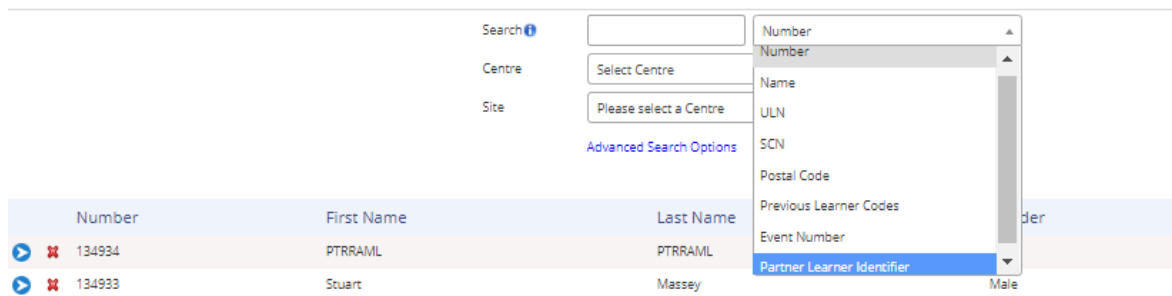


Figure 7-2 : Learners search page

Buttons available are

Button	Purpose
	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.

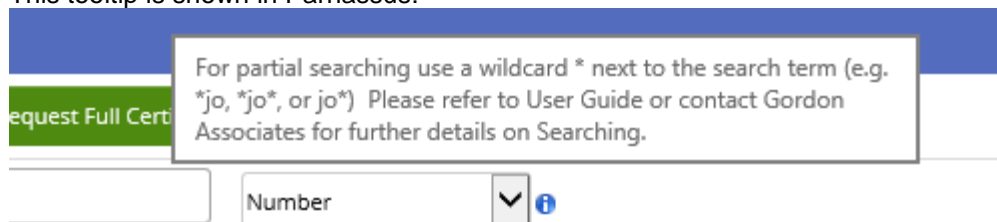
7.1.1.Using Wildcards (* or %) by example

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 tooltip is shown in Parnassus:



7.1.2.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.

7.1.3.Advanced Search for learners

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

7.1.4.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.

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.

7.1.5. Advanced Search for 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.

The screenshot shows the 'Advanced search Learners search page' interface. At the top, there is a navigation bar with links for 'Centres', 'Venues', 'Learners', 'Qualification', 'Certificates', 'Reporting', 'Contacts', 'Admin', and 'Events'. Below this is a secondary navigation bar with buttons for 'Achievement Upload', 'Quick Grade Entry', 'Request Full Certificates', 'Registration Card Batches', and 'Pending Alt Achievements'. The main search area contains several input fields and dropdown menus: 'Number' (with a 'PLI' label and a separate input field), 'ULN' (with a 'SCN' label and a separate input field), 'First Name', 'Last Name', 'Date of Birth' (with a 'Postcode' label and a separate input field), 'Centre's Country' (dropdown menu with 'All' selected), 'Centre' (dropdown menu with 'Select Centre' selected), and 'Site' (dropdown menu with 'Please select a Centre' selected). At the bottom of the search area, there is a link for 'Simple Search Options' and a green 'Search' button.

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.
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 7.

7.1.6. 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

7.1.7. Adding Learners

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

7.1.7.1 Learner Details

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 www.miap.gov.uk 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.
SCN	Scottish Candidate Number	Must pass the SCN checksum validation
Previous Surname(s)	Any previous Surname(s) the learner has had	Optional
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:
NI Number	The learner National Insurance Number	Optional
Request Registration Card	If selected, the learner will appear in the next Registration Card Batch for the site.	Optional
Work Phone No.	The Work Phone No. of the learner	Optional
Mobile Phone No.	The Mobile Phone No. of the learner	Optional
Email Address	The Email Address of the learner	Optional
Account Number	The Account number for the learner	Optional
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:

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:

Buttons available are

Button	Purpose
	Saves entered data and allows the user to continue editing the current Learner.
	Saves entered data, then clears screen fields and allows the user to add another new Learner.
	Saves entered data, then returns to the Learners Search page.
	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 7.1.8.

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.

7.1.7.2 Access

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

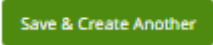
Button	Purpose
	Add Reasonable adjustments for the learner to the list, ready to be saved.
	Remove Reasonable adjustments for the learner from the list, ready to be saved.

7.1.7.3 Learner Events

Figure 7-7 : Add Learner Events tab

Buttons available are

Button	Purpose
	Saves entered data and allows the user to continue editing the current Learner.

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

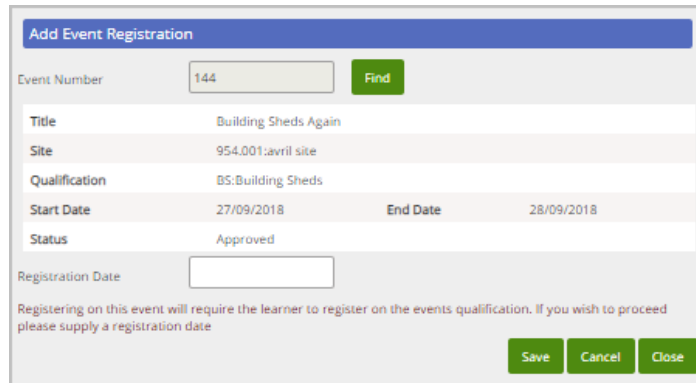

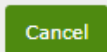


Figure 7-8 : Add Event Registration page

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

7.1.7.4 Partner Learner Identifiers

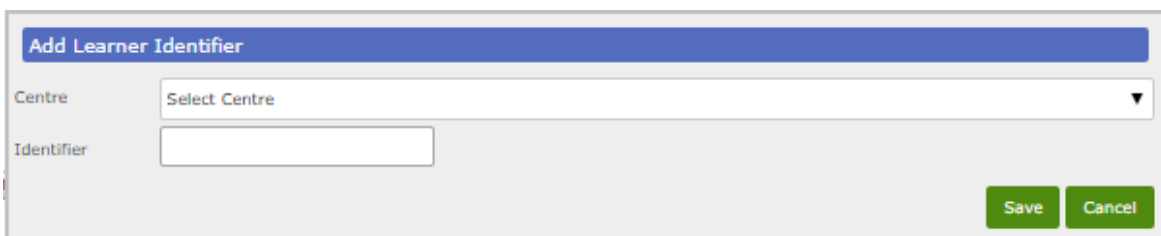




Figure 7-9 : Add Learner Identifier page

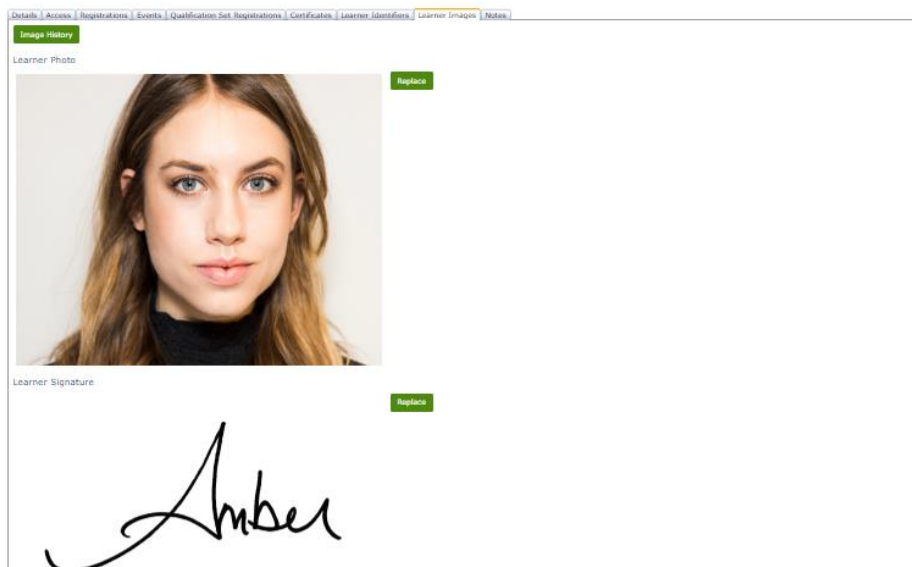
Field Name	Purpose	Validation
Centre	The forename of the learner	Mandatory
Identifier	External System Identifier – Identifier used in a system other than Parnassus. Learners may have more than 1 identifier, but only 1 identifier per centre.	Mandatory

Buttons available are

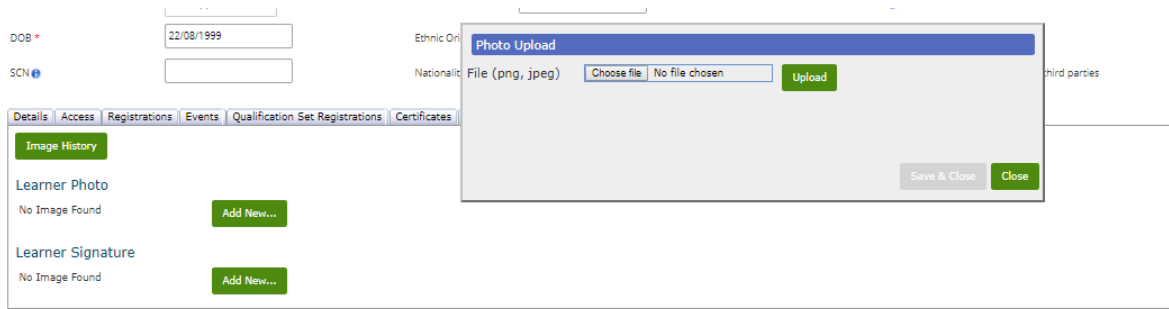
Button	Purpose
	Saves entered data and allows the user to continue editing the current Learner.
	Returns to the Learners page, without saving any changes.


7.1.7.5 Learner Images

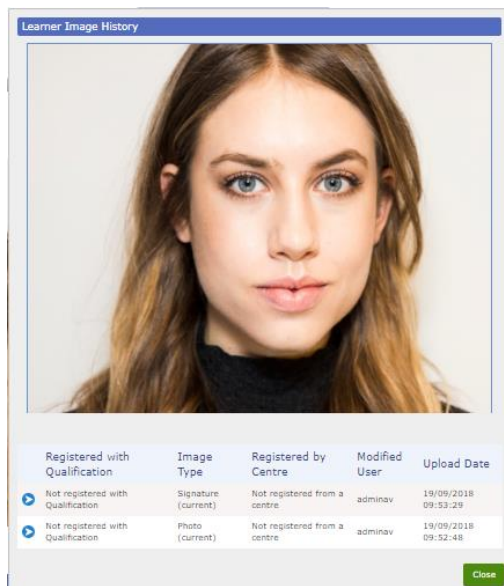
In the Learner Images tab you can add a Learner Photo and a Learner Signature – these can be set as mandatory requirements on a qualification.




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.



The Learner Photo or Learner signature can be replaced by using the Replace button and uploading the replacement image. The history of the images used is accessible by the Image History button. You can view the current and previous images by using select  on the row for the image.



7.1.8.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.

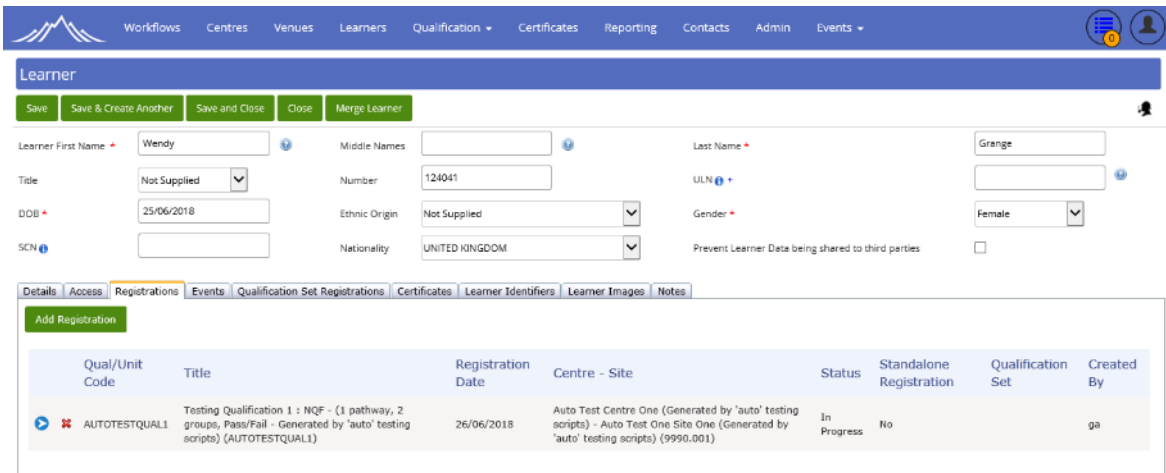


Figure 7-10 : Edit existing learners page

Buttons available are

Button	Purpose
	Saves entered data and allows the user to continue editing the current Learner.
	Saves entered data, then clears screen fields and allows the user to add another new Learner.
	Saves entered data, then returns to the Learners Search page.
	Returns to the Learners Search page, displaying the previous search results, without saving any changes.
	Only used in Learner Edit mode, as there must be a learner to merge. See section 7.1.9.
	Display the Audit History Screen.

Edit the required fields and click save.

7.1.9. Merge Learner

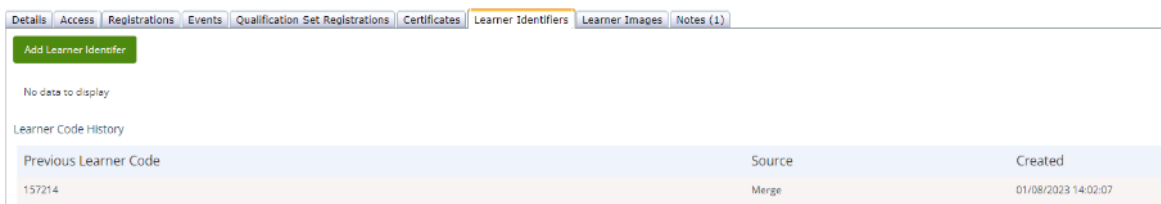


Figure 7-11: Merge learner

Buttons available are

Button	Purpose
	Selects the learner associated with the entered source learner code to be merged.
	Find any duplicate records, where the learner has the same date of birth and a similar Name or similar previous Surname.
	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.
	Returns to the Learners Edit page without merging any data.

Following a merge the learner code history can be viewed on the learner identifiers tab:



7.1.10. Deleting Learners

Select to the left of the required record to delete the associated details. See Figure 7.1: Learners Search screen.

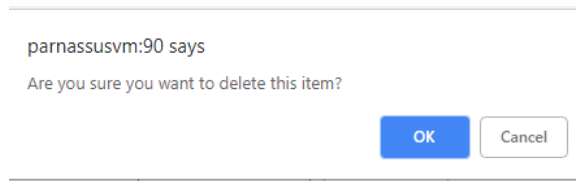


Figure 7-12: Confirmation of deleting a learner

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

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.

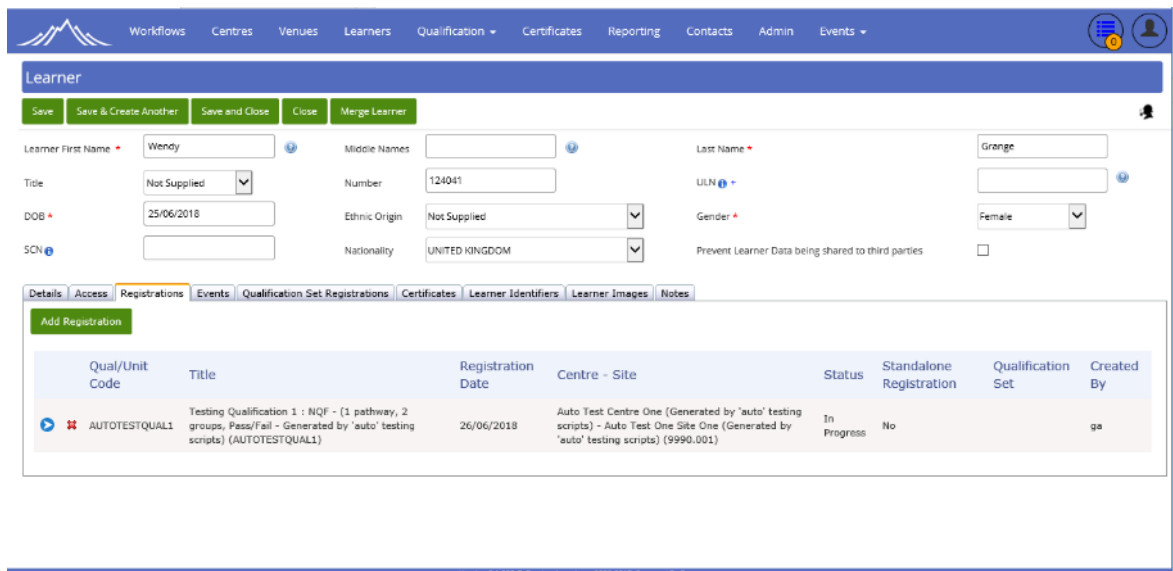


Figure 7-13 : Manage learner registrations tab on learner details page

Buttons available are

Button	Purpose
	Add a new Registration for the current Learner. See section 7.2.

Select to the left of the required entry to edit the Qualification Registration.

Select to the left of the required record to delete the associated details.

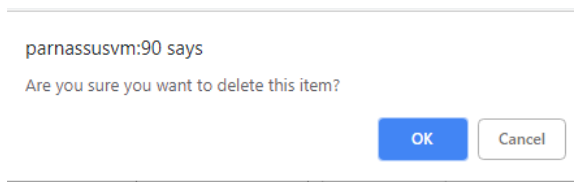


Figure 7-14 : Confirmation of deleting a learner registration

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.

7.2.1.Add Registration

Add a new Registration for the current Learner.

Figure 7-15 : In-page add registration popup

Buttons available are

Button	Purpose
	Saves entered data.
	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:

7.2.2. Edit Qualification Registration

Edit a Qualification Registration for the current Learner.

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 7.2.5. Recalculates an overall grade for the Qualification. See section 7.2.12.
	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

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
Total Credit To Date	0 / 2
Grade	

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

7.2.3. Edit Qualification Registration - Units

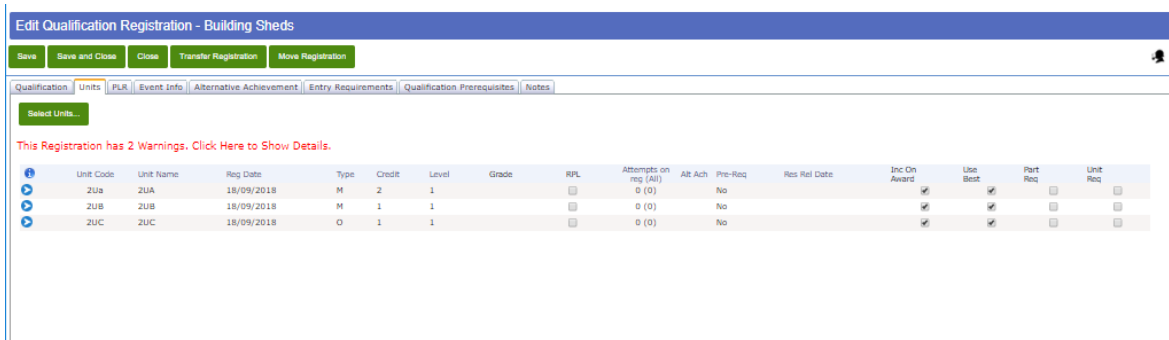


Figure 7-18 : Edit Qualification Registration – Units page

Buttons available are

Button	Purpose
	Opens the Edit Qualification Registration – Pathway screen. See Section 7.2.8.

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). This can be configured to be the latest assessment (by date) rather than the best available (by grade). Please contact Gordon Associates for further information.	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 to the left of the required entry to edit the Qualification Registration. See section 7.2.5.

Clicking on the 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

Mandatory: 0 Optional: 1

Group	Subject	Level	Credit Cap	Achievement Month Limit	M / O	UAN	Title	Credit Achieved	Grade
Mandatory	1.1 : Medicine and Dentistry	1	5	24	Optional	UN1	Horse Dentistry	5	Pass

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

Buttons available are

Button	Purpose
	Opens the Add Other Units Constraint Registration screen.

7.2.4.Add Other Units Constraint Registration

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

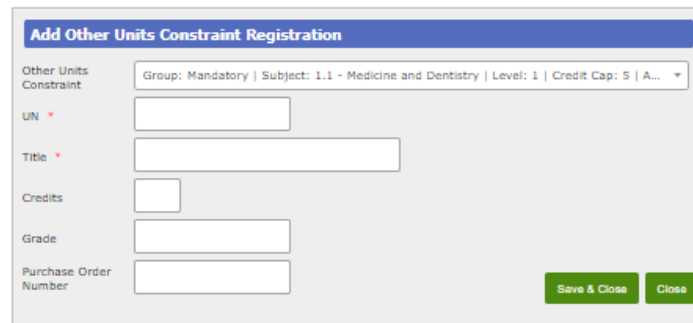
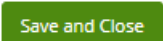



Figure 7-20 : In-page Add Other Units Constraint Registration details popup

Buttons available are

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

7.2.5. Unit Registration Details – Non Credit Based

Enter grades obtained for the unit.

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

Buttons available are

Button	Purpose
	Add the Grade achieved.
	Saves any data changes.
	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

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.

7.2.6. 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.

Figure 7-22 : In-page edit unit registration details popup

Buttons available are

Button	Purpose
	Add the Grade achieved.
	Saves any data changes and returns to the Edit Qualification Registration – Units screen.
	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

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.

7.2.7. 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.

Unit Code	Unit Name	Reg Date	Type	Credit	Level	Grade	RPL	Attempts on reg (All)	Alt Ach	Pre-Req	Res Ref Date	Inc On Award	Use Best	Part Req	Unit Req
2Ua	2UA	18/09/2018	M	2	1		<input checked="" type="checkbox"/>	0 (0)	No			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2Ub	2UB	18/09/2018	M	1	1		<input type="checkbox"/>	0 (0)	No			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.



- >> 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.

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	

* 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.



- >> 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.

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	

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.

The screenshot shows a web application interface for 'Edit Qualification Registration - Building Sheds'. At the top, there are buttons for 'Save', 'Save and Close', 'Close', 'Transfer Registration', and 'Move Registration'. Below these are tabs for 'Qualification', 'Units', 'PLR', 'Event Info', 'Alternative Achievement' (which is active), 'Entry Requirements', 'Qualification Prerequisites', and 'Notes'. Under the 'Alternative Achievement' tab, there are three buttons: 'Add Equivalency', 'Add Planned Exemption', and 'Add Unplanned Exemption'. The main content area below these buttons displays the text 'No Exemptions or Equivalencies'.

>> 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.

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.

7.2.8.Edit Qualification Registration - Pathway

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

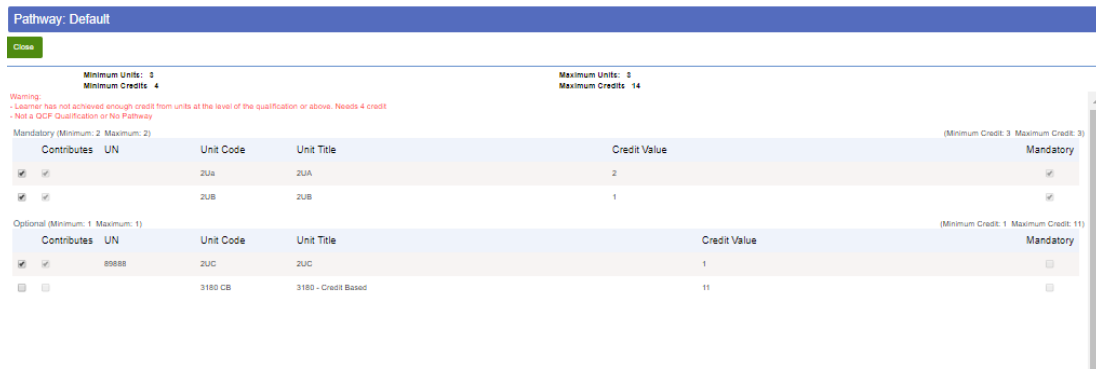


Figure 7-23 : Edit Pathway page

Buttons available are

Button	Purpose
	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.

7.2.9. Edit Standalone Qualification Registration - Pathway

Select the unit to be allocated to the Learners Pathway.

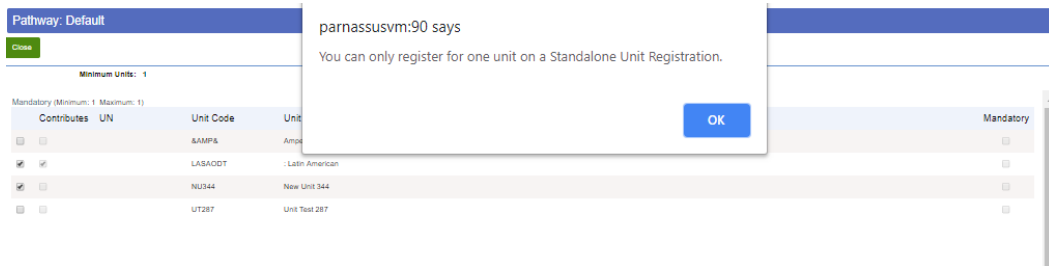


Figure 7-24 : Edit Pathway (Standalone Qualification) popup

Buttons available are

Button	Purpose
	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.

7.2.10. Transfer Registration

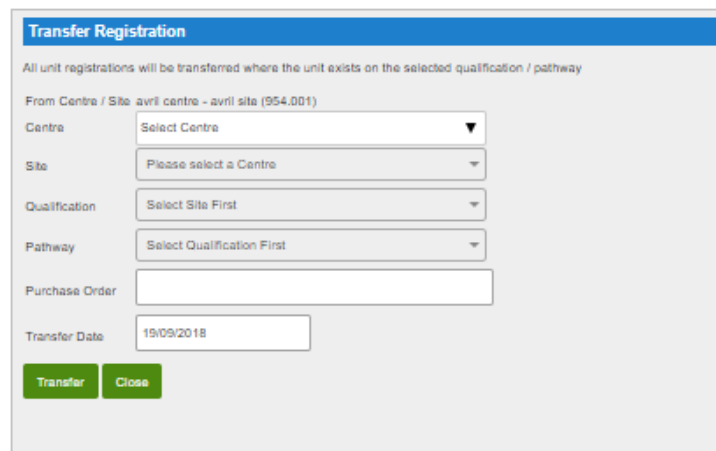


Figure 7-25 : In-page transfer registration popup

Buttons available are

Button	Purpose
	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.. Note: Parnassus checks qualification is offered at new site at the time of the transfer, using the Transfer Date.

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

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
Purchase Order	Purchase order reference	Optional (unless the site has the Purchase order reference stipulated as Mandatory)
Transfer Date	Date of transfer	Mandatory

The screenshot shows the 'Learner' management interface. At the top, there are navigation tabs: Workflows, Centres, Venues, Learners, Qualification, Certificates, Reporting, Contacts, Admin, and Events. Below this is a 'Learner' header with buttons for 'Save', 'Save & Create Another', 'Save and Close', 'Close', and 'Merge Learner'. The learner details form includes fields for First Name (Wendy), Middle Names, Last Name (Grange), Title (Not Supplied), Number (124041), ULN, DOB (25/06/2018), Ethnic Origin (Not Supplied), Gender (Female), and Nationality (UNITED KINGDOM). Below the form is a 'Details' tab with sub-tabs for 'Access', 'Registrations', 'Events', 'Qualification Set Registrations', 'Certificates', 'Learner Identifiers', 'Learner Images', and 'Notes'. The 'Registrations' sub-tab is active, showing a table with two rows. The first row has a status of 'In Progress', and the second row has a status of 'Transferred'.

Qual/Unit Code	Title	Registration Date	Centre - Site	Status	Standalone Registration	Qualification Set	Created By
AUTOTESTQUAL1	Testing Qualification 1 : NQF - (1 pathway, 2 groups, Pass/Fail - Generated by 'auto' testing scripts) (AUTOTESTQUAL1)	26/06/2018	Auto Test Centre Two (Generated by 'auto' testing scripts) - Auto Test Two Site One(Generated by 'auto' testing scripts) (9991.001)	In Progress	No		ga
AUTOTESTQUAL1	Testing Qualification 1 : NQF - (1 pathway, 2 groups, Pass/Fail - Generated by 'auto' testing scripts) (AUTOTESTQUAL1)	26/06/2018	Auto Test Centre One (Generated by 'auto' testing scripts) - Auto Test One Site One (Generated by 'auto' testing scripts) (9990.001)	Transferred	No		ga

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.

7.2.11. Move Registration

The 'Move Registration' popup dialog box has a blue header with the title 'Move Registration'. Below the header is a red warning message: 'Warning: This feature is intended for Super Users only. No validation is performed when attempting a move.' Underneath, it says 'From Centre / Site avrll centre - avrll site'. There are two dropdown menus: 'Centre' with the value '00002:Ivy Baker' and 'Site' with the value '00002:Ivy Baker'. At the bottom, there are two buttons: 'Move' and 'Close'.

Figure 7-27 : In-page move registration popup

Buttons available are

Button	Purpose
	Moves the registration to the new location. Updates the existing registration entry with the new Centre location.
	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

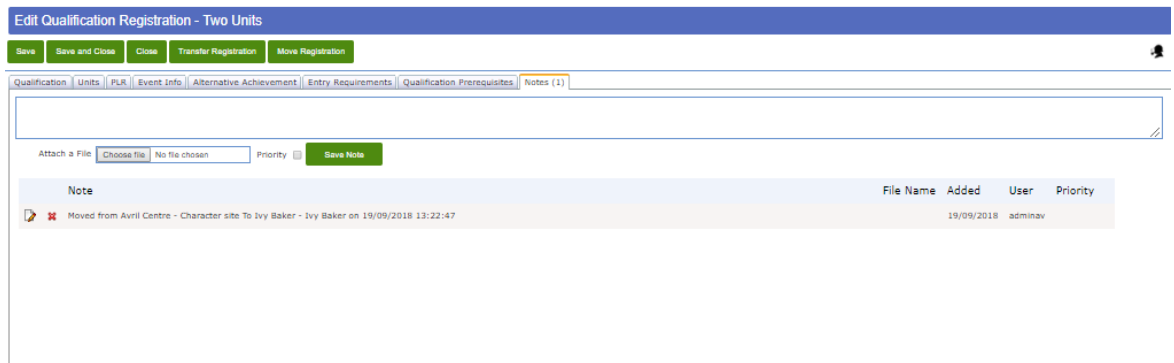


Figure 7-28 : Manage learner Notes page with moved details.

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.

7.2.12. 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.

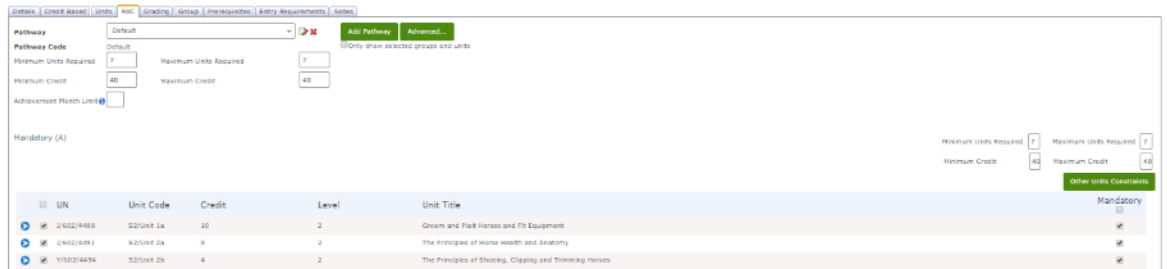


Figure 7-29 : Qualification Pathway

7.3 View Learners Certificates

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

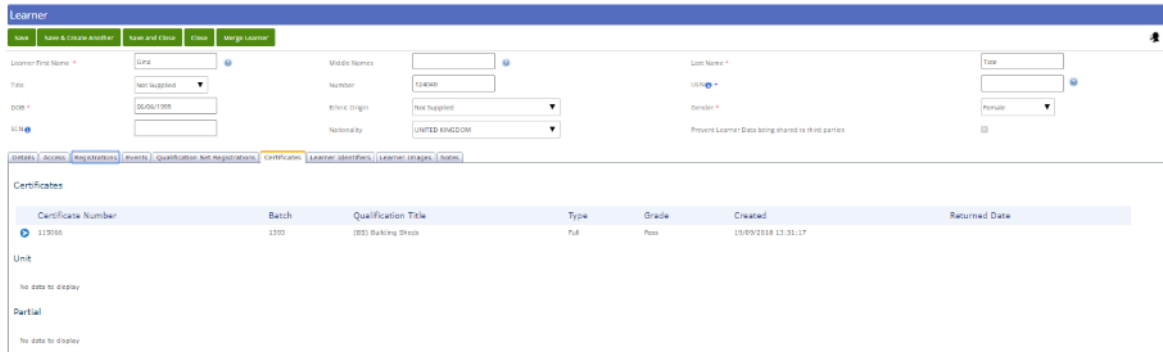



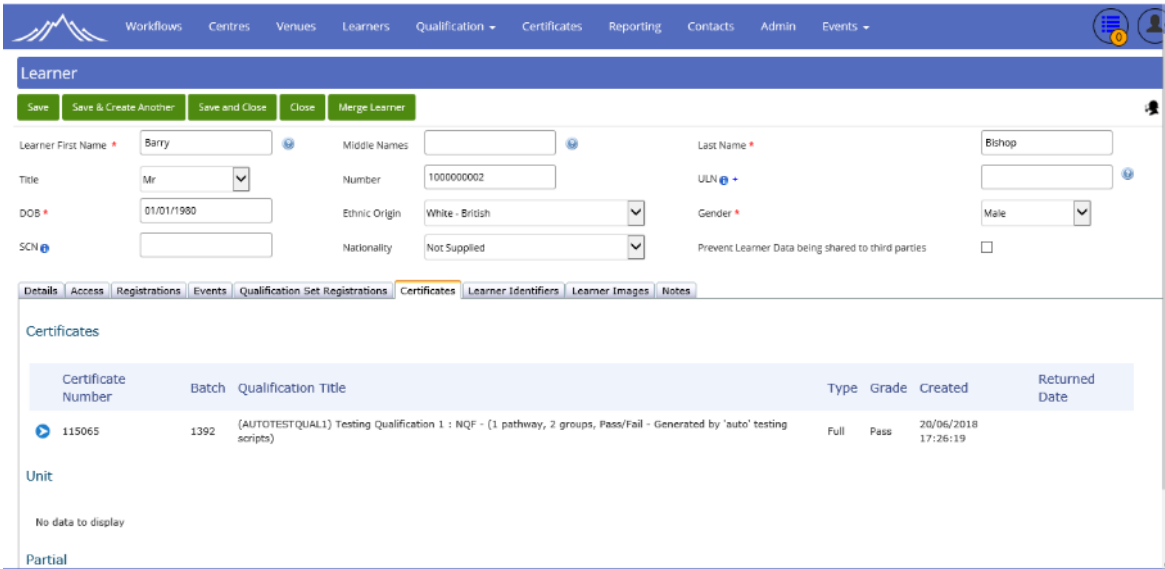
Figure 7-30 : View learners certificates page

7.3.1. 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.



The screenshot shows the 'Learner' profile page for Barry Bishop. The 'Certificates' tab is active, displaying a table with the following data:

Certificate Number	Batch	Qualification Title	Type	Grade	Created	Returned Date
 115065	1392	(AUTOTESTQUAL1) Testing Qualification 1 : NQF - (1 pathway, 2 groups, Pass/Fail - Generated by 'auto' testing scripts)	Full	Pass	20/06/2018 17:26:19	

7.3.2. 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.

Figure 7-31 : In-page popup to edit a certificate’s details

Buttons available are

Button	Purpose
	Saves any data changes.
	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.
	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.
	Creates new batch details entry to print a Replacement of the award certificate.
	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.

7.3.3. 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.

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

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

Certificate Number	Batch	Qualification Title	Type	Grade	Created	Returned Date
112056	1202	(80) Building Sheets	Full	Pass	19/09/2018 13:31:17	19/09/2018

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 new rows added. It can then be validated against data in the live Database, and valid rows can be imported into Parnassus.

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

[Parnassus Quick Start Guide to Batch Registrations](#)

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

The screenshot shows the 'Registration Upload' page in Parnassus. It features a navigation bar at the top with various menu items. Below the navigation bar, there are two buttons: 'New Import From File' and 'New Blank Import'. A search bar is present for filtering files by 'Uploaded By Centre' and 'File Name'. The page is divided into three main sections, each with a table of file details:

Current File List						
File Name	Records	Created	Modified	Created By	Centre Code	
sports studies 2008/2018	0	20/08/2018 13:45:52	20/08/2018 13:45:52	ga		

Files in Processing						
File Name	Records	Created	Modified	Created By	Centre Code	
rar	2	22/06/2018 16:55:38	22/06/2018 16:57:00	ga		

Files Processed						
File Name	Records	Created	Modified	Created By	Centre Code	
Calibre Test File	1	07/08/2018 15:35:08	07/08/2018 15:40:00	oalireadmin	1275	
dob with existing learner	1	26/06/2018 10:30:00	26/06/2018 10:30:46	ga		
dob issue	1	26/06/2018 09:27:08	26/06/2018 09:34:44	ga		
3	16	20/06/2018 16:43:45	20/06/2018 16:48:30	ga		

- **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.



File Errors


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
	Selects an existing registrations CSV file to be imported into Parnassus. See Section 7.4.
	Creates a blank “virtual” file, to which data can be added. This allows quick entry of bulk learner and registration data.

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

Select  to the left of the file to view the registration file summary (this is available to centre users but can be hidden – contact GA)

Select  to the left of the required file to delete the file from the “Current File List”.

Select  to the left of the required file to delete the file from the “Files in Processing”.

7.4.1.Existing File Upload

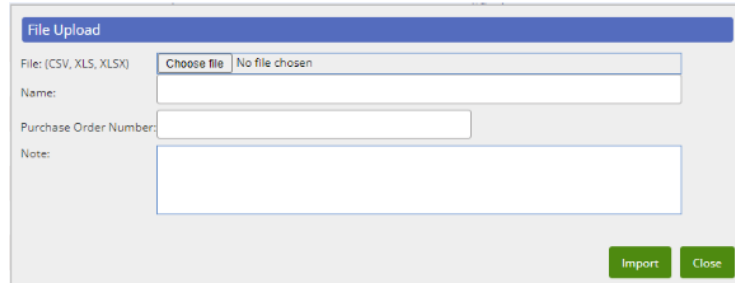


Figure 7-33 : Existing file upload in-page popup

Buttons available are

Button	Purpose
	Select Import will add an empty Import File Details row to the "Current File List".
	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

7.4.2.Create Upload File

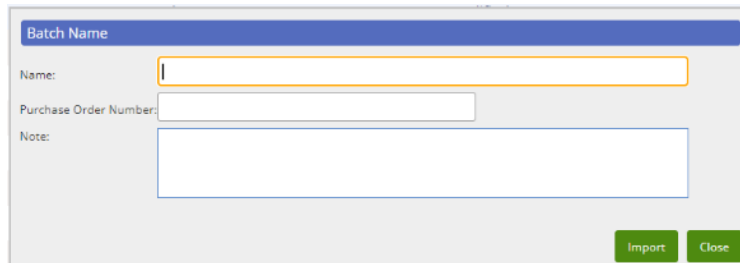




Figure 7-34 : New file upload in-page popup

Buttons available are

Button	Purpose
	Select Import will add an empty Import File Details row to the "Current File List".
	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

7.4.3.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

7.4.4.Import File Definition example

Column Header	Data
FirstName	Timmy
MiddleName	J
LastName	Fox
PreviousSurname	Jones
Dob	12/03/1984
Gender	M
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”.



Figure 7-35 : Import file details page

Buttons available are

Button	Purpose
	Return to the Batch Registrations Import screen.
	Revalidate all data after edit.
	Add a new row of data for processing with the existing imported data.
	Revalidate all data and then move to “Files Processed”. After this you will be able to see the Learners in the main Learners screen.
<input type="checkbox"/> Hide Valid	Allows the user to hide valid rows whilst fixing validation errors.
<input checked="" type="checkbox"/> Hide Processed	Allows the user to hide rows which have been successfully imported into Parnassus
<input type="checkbox"/> Hide Centre only Duplicates	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.

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.

7.5.1.Edit Row

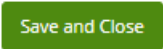


Select  to the left of the required file in the Import File Details screen to edit the details which have been uploaded from the file. The screen now has tab sections for the Registration, Additional Information, Contact Details and Disability and Adjustment to make it easier to find and edit information.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

The screenshot shows the 'Edit Item' form with the following sections:

- Identifiers:** Learner Code, ULN, Learner Lookup (Lookup On: Learner Code, Find Learner button), and Lookup Value.
- Learner Details:** Title (Not Supplied), Gender (Female), DOB (01/01/1980), First Name (test), Middle Name (test), Last Name (test), and several RegCustom fields.
- Registration Tab (Active):** Centre (9990:Auto Test Centre One), Site (9990.001:Auto Test One Site One), Qualification (AUTOTESTQUAL1:Testing Qualification 1), Registration Date (20/11/2018), Pathway Code, Qualification Group Code, Unit Code, and Purchase Order Number.

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

Buttons available are

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

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

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

7.5.2.Tab Detail Example

Registration

Registration | Additional Information | Contact Details | Disability and Adjustment

Centre: 9990:Auto Test Centre One (Generated by 'auto' testing scripts) | Registration Date: 20/11/2018

Site: 9990.001:Auto Test One Site One (Generated by 'auto' testing scr... | Qualification: AUTOTESTQUAL1:Testing Qualification 1 : NQF - (1 pathway, 2 gr... | Qualification Set Code: []

Pathway Code: [] | Qualification Group Code: [] | Unit Code: []

Purchase Order Number: [] | Registration Group Code: []

Include On Award

Additional Information

Registration | Additional Information | Contact Details | Disability and Adjustment

Previous Surname: [] | SCN: []

Ethnic Origin: Not Supplied | Nationality: UNITED KINGDOM

NI Number: []

Height: [] m [] ft [] in | Photo: No Image Found | Add New

Weight: [] kg [] st [] lb | Signature: No Image Found | Add New

Assessment language: Default

Study Mode: Not Supplied | Import Group: 1

Partner Learner Identifier: []

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


Registration | Additional Information | Contact Details | Disability and Adjustment

Disability: 99 : Not known/information not ... | Learning Disabilities: 9 : No information provided by l... |

Specific Learning Difficulty: 99 : Not known/ information not... | Additional Learning Need: 99 : Not known/ information not... |

Reasonable Adjustments: 99:Not Known

7.5.3.Import File Details Error List

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

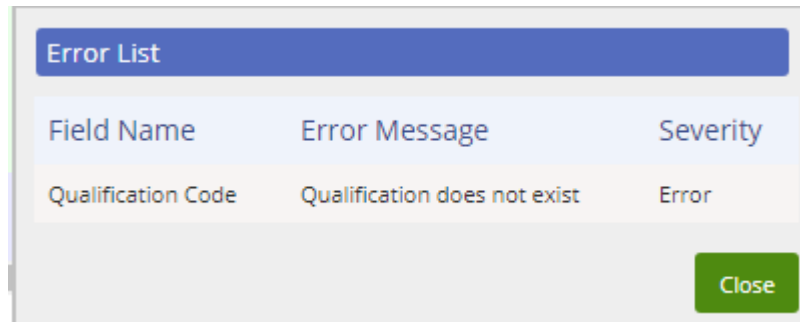


Figure 7-37 : Error list in-page popup

7.5.4.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.

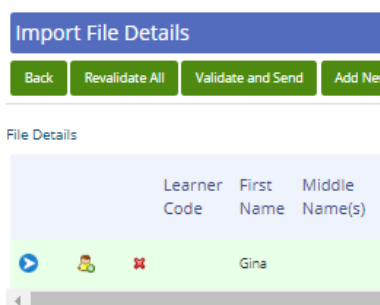
Duplicate detection is done by matching the following fields in combination:

- First Name – if “sounds like¹” 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.

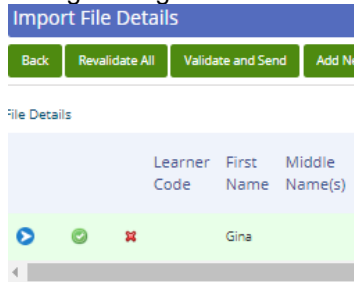
Additionally, if previous surname is provided and matches last name in Parnassus this supersedes the last name check.

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.



¹ 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.

7.5.5. 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.

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

9.1.9 Existing Learner Updates

7.5.6.

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:

Gordon Associates

“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).

7.5.7.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:

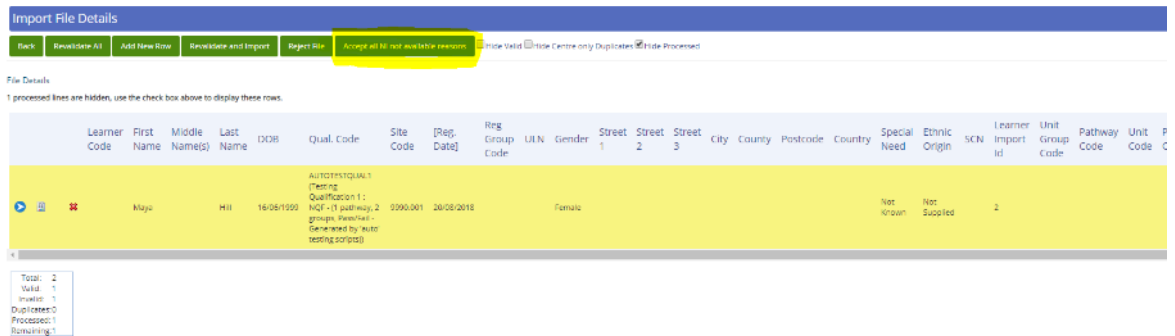
SCN:	<input type="text"/>
NI Number	<input type="text"/> <input checked="" type="checkbox"/> NI Number required
Reason why NI is not required:	<input type="text" value="Not Supplied"/>

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

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

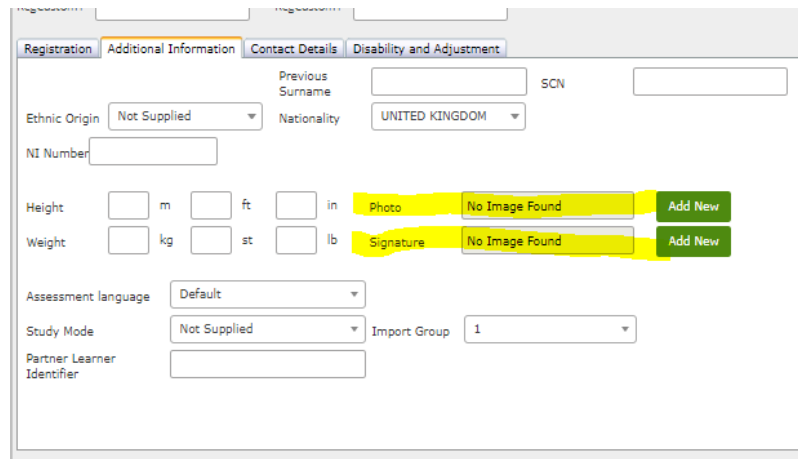
[Close](#)

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.

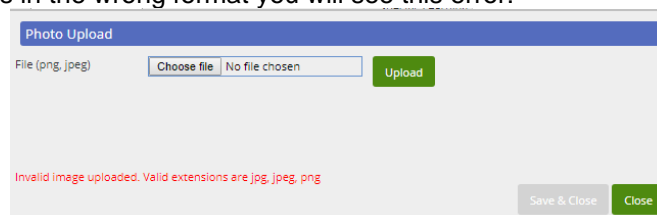


7.5.8.Photo and Signature

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.

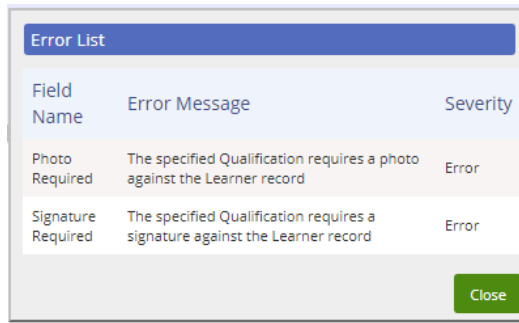


If the image file is in the wrong format you will see this error:

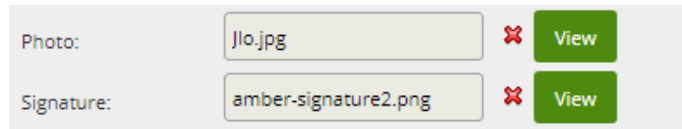


If the image size is too large you will also see an error.


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



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



7.5.9. Delete Import File Details

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

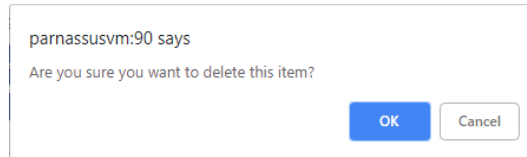


Figure 7-38 : Confirmation of deleting a file

Select OK, to delete, otherwise cancel the deletion.

7.5.10. Add New Row

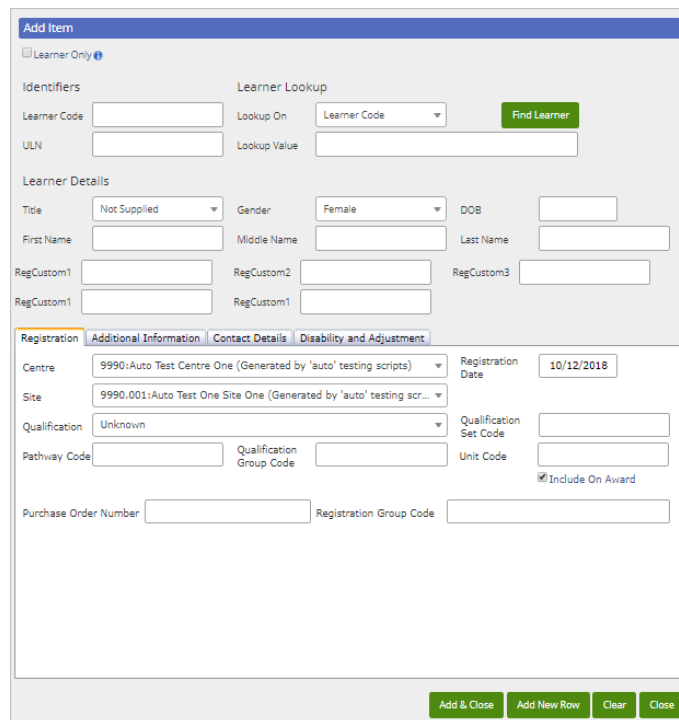


Figure 7-39 : New File Upload row popup

Buttons available are

Button	Purpose
	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.
	Saves any data changes as a new Item/Row. Screen is closed and returns the user to the Import File Details screen.
	Clears all details from the Add Item popup.
	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.

7.5.11. Import File Details – Revalidate and Import

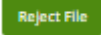
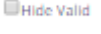
Enables users to edit, validate and finally process the data uploaded from the Import File.





Figure 7-40 : Import file details page

Buttons available are

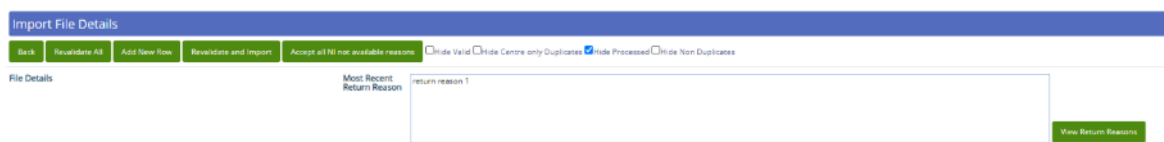
Button	Purpose
	Return to the Batch Registrations Import screen.
	Revalidate all data after edit.
	Add a new row of data for processing with imported data.
	Validate data and send into main Parnassus database and then move to “Files in Processed”. After this you will be able to see the Learners in the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

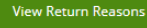
	Removes the data from “Files In Processing” and returns it to the “Current File List”. The reject information is now saved with the reason for the rejection. Most recent reason is shown at the top
	Allows the user to hide valid rows whilst fixing validation errors.

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 7.5.

Select  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.



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

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.

7.7.1.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

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.

Import File Details																										
<input type="button" value="Back"/> <input type="button" value="Revalidate All"/> <input type="button" value="Add New Row"/> <input type="button" value="Revalidate and Import"/> <input type="checkbox"/> Hide Valid <input type="checkbox"/> Hide Processed																										
st	Middle	Last	DOB	Qual. Code	Site	[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	
gr		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							QS1
gr		Woods	18/03/1999	AUTOTESTQUAL2 (Testing Qualification 2: NQF - (2 pathway, 3 groups: ABCD, Pre Req) - Generated by 'auto' testing scripts))	9990.001	22/08/2018			Male								Not Known	Not Supplied	1							QS1

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-riden by information pertaining to the Qualification-Set.

The screenshot shows the 'Learner' registration form with the following details:

- Learner First Name:** Roger
- Middle Names:** (Empty)
- Last Name:** Woods
- Title:** Not Supplied
- Number:** 124045
- ULN:** (Empty)
- DOB:** 18/03/1999
- Ethnic Origin:** Not Supplied
- Gender:** Male
- SCN:** (Empty)
- Nationality:** Not Supplied
- Prevent Learner Data being shared to third parties:** (Checked)

The 'Registrations' tab is active, showing a table of qualification registrations:

Qual/Unit Code	Title	Registration Date	Centre - Site	Status	Standalone Registration	Qualification Set	Created By
AUTOTESTQUAL2	Testing Qualification 2 - NQF - (2 pathway, 3 groups: ABCD, Pre Req) - Generated by 'auto' testing scripts) (AUTOTESTQUAL2)	22/08/2018	Auto Test Centre One (Generated by 'auto' testing scripts) - Auto Test One Site One (Generated by 'auto' testing scripts) (9990.001)	In Progress	No	QS1	evcentre
AUTOTESTQUAL1	Testing Qualification 1 - NQF - (1 pathway, 2 groups: Pass/Fail - Generated by 'auto' testing scripts) (AUTOTESTQUAL1)	22/08/2018	Auto Test Centre One (Generated by 'auto' testing scripts) - Auto Test One Site One (Generated by 'auto' testing scripts) (9990.001)	In Progress	No	QS1	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.

The screenshot shows the 'Learner' registration form with the same personal details as above. The 'Registrations' tab is active, but only one registration is visible:

Code	Title	Registration Date	Centre - Site	Transferred
QS1	Qual Set 1	23/08/2018	Auto Test Centre One (Generated by 'auto' testing scripts)-Auto Test One Site One (Generated by 'auto' testing scripts) (9990.001)	(Checked)

Qualification-Set Registration shown, for information only.

7.7.2. 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 were 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 were 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.

Figure 7-41 : Achievement Upload page

Buttons available are

Button	Purpose
	Selects an existing grades CSV file to be imported into Parnassus. See Section 7.4.
	Creates a grades CSV file to be imported into Parnassus. See Section 7.4.2. You would use this screen as an alternative method of quickly entering a batch of learners and registrations.
	Creates a grades CSV file to be imported into Parnassus. See Section 7.9. Use the Quick Grade Entry criteria to select the learners to be included in the file.

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

Select to the left of the file to view the grade file summary (this is available to centre users but can be hidden – contact GA)

Select to the left of the required file to delete the file from the “Current File List”.

Select to the left of the required file to delete the file from the “Files in Processing”.

Select to assign an external verifier, where the status is: “Needs EV Approval”. See Section 7.8.6.

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

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.

7.8.1.Existing File Upload

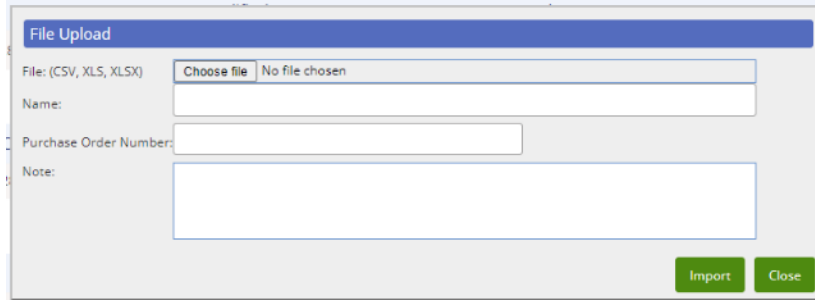


Figure 7-42 : Existing file upload in-page popup

Buttons available are

Button	Purpose
	Select Import will add an empty Import File Details row to the “Current File List”.
	Returns to the Achievement Upload screen.
	Choose the file to upload

Field Name	Purpose	Validation
File	Enter the filename, or select Browse... and select the CSV file of the grades 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

7.8.2.Create Upload File

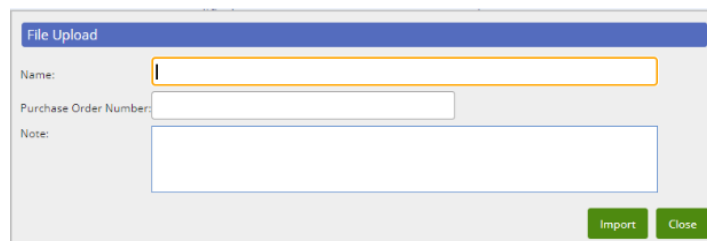




Figure 7-43 : New file upload in-page popup

Buttons available are

Button	Purpose
	Select Import will add an empty Import File Details row to the "Current File List".
	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

7.8.3.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

7.8.4.Import File Definition example

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

7.8.5.Import File Details

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

7.8.6.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.

7.7.6.1 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'.


Files in Processing

File Name	Records	Created	Modified	Created By	Status	Centre Code	Centre Name
Mcfly	0	06/12/2017 12:02:15	06/12/2017 12:04:24	marlymcfly	Needs EV Approval	994444	Mar...
MuppetyMuppet	0	06/12/2017 11:49:06	06/12/2017 11:53:29	ga	Needs EV Approval		
L & F	2	01/10/2015 16:06:32	01/10/2015 16:08:18	ga	Assigned to EV DamianEV		
site no ampersand ev	2	01/10/2015 15:12:18	01/10/2015 15:14:51	ga	Assigned to EV DamianEV		
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

7.7.6.2 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.

Select  to assign an external verifier.

Files in Processing

File Name	Records	Created	Modified	Created By	Status
ev again	3	18/09/2018 15:29:15	18/09/2018 15:39:47	adminav	Assigned to EV evav
Mcfly	0	06/12/2017 12:02:15	06/12/2017 12:04:24	marlymcfly	Needs EV Approval
MuppetyMuppet	0	06/12/2017 11:49:06	06/12/2017 11:53:29	ga	Needs EV Approval
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

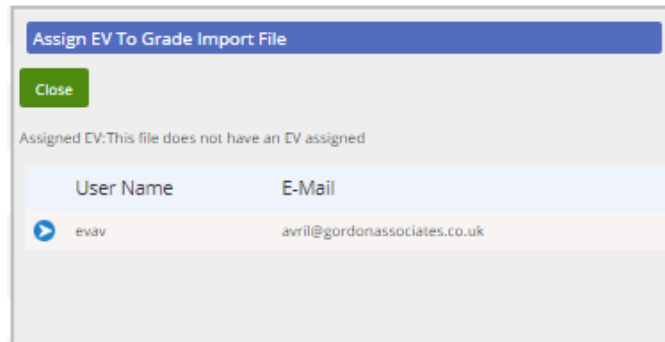


Figure 7-46 : Assign EV To Grade Import File popup

Buttons available are

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

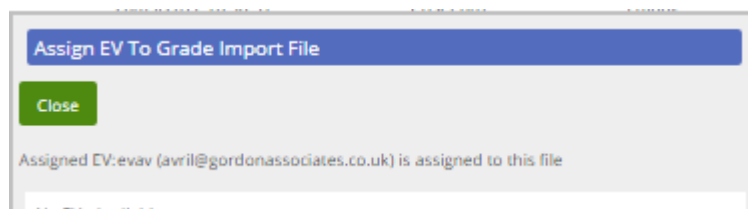


Figure 7-47 : EV Assigned

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.

7.8.7.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.

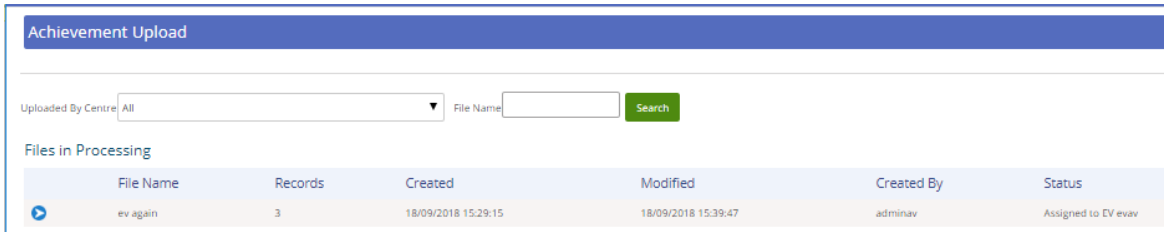


Figure 7-48 : Grade Import Files Assigned To EV

Buttons available are

Button	Purpose
	Select a Grade Import File to approve.

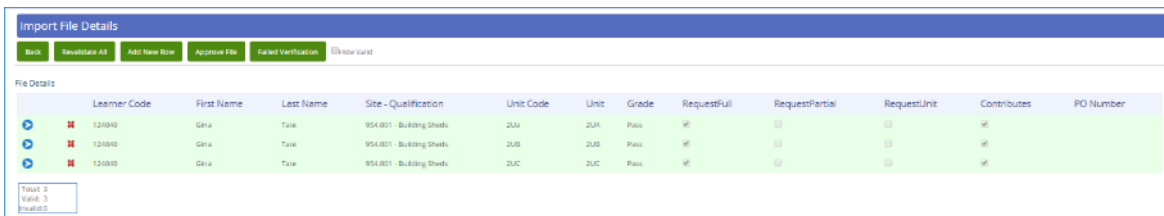


Figure 7-49 : External Verifier Approval

Buttons available are

Button	Purpose
	Edit the Import File details.
	Delete the Import File details.
	Returns to the Achievement Upload screen.
	Revalidate all the details to be imported.
	Add a new row of details to be imported.
	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.
	Mark the file as being failed verification for upload.
<input type="checkbox"/> 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.

7.8.8. 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.

File Name	Records	Created
cherry cola grade assoc site 001	3	01/10/2019 16:20:50
mary urber grades	3	30/09/2019 16:09:35
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:

File Name	Created	Modified User	First Name	Middle Name	LastName	Learner Number	Partner Learner Identifier	Site Code
mary urber grades	30/09/2019 16:09:35	AvrilAdmin	Mary		Urber	134828		1302.00

7.8.9. 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 Name	Records	Created	Modified	Created By	Status	Centre Code	Centre Name
grade validator	5	17/12/2019 14:12:19	17/12/2019 15:46:22	citycen	Awaiting Validation	1344	City Centre (1344)

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 15:46:36	17/12/2019 15:50:55	citycen	Editing

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

Import File Details						
Back	Summary Report	Revalidate All	Validate and Send	Add New Row	<input type="checkbox"/> Hide Valid	
File Details						
	Learner Code	First Name	Last Name	Site - Qualification	Unit Code	
	135023	Flora	White	1344.001 - Printing Skills	AutoTestUnit002	
	135023	Flora	White	1344.001 - Printing Skills	AutoTestUnit001	
	135021	Daisy	Green	1344.001 - Printing Skills	AutoTestUnit001	
	135021	Daisy	Green	1344.001 - Printing Skills	AutoTestUnit002	

And see the error message by clicking on it.

Error List		
Field Name	Error Message	Severity
Request Full	Invalid certificate request: This learner has not completed the correct combination of units to complete this qualification.	Error

[Close](#)

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

Files in Processing						
File Name	Records	Created	Modified	Created By	Status	
test grade validator	6	17/12/2019 14:12:15	17/12/2019 15:45:54	claycen	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 Processing									
File Name	Records	Created	Modified	Created By	Status	Centre Code	Centre Name		
PTBGDIM - Expected Outcome Suspe...	1	03/10/2019 10:46:54	03/10/2019 10:47:05	GA	Needs EV Approval				
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		
tizer cup grades no emails	2	01/10/2019 13:20:18	01/10/2019 13:21:07	centrev	Assigned to EV eviv	1302	Avril's Super Centre (1302)		
PUG2019_Grade_Upload_TFS3050_EV	5	24/09/2019 00:15:20	24/09/2019 00:15:37	PUG2019 AD Admin	DCS Expired				
RequiresJLNCheckSeverity	2	20/09/2019 15:43:47	20/09/2019 15:47:53	GA	Processing				
EV Test 1	1	20/09/2019 10:36:45	20/09/2019 11:38:58	MattCentre	Assigned to EV MattEv	1301	Matt Test (1301)		

Revalidate and Import
Return File

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	
Back	Summary Report Revalidate All Validate and Send Add New Row <input type="checkbox"/> Hide Valid
File Details	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Most Recent Return Reason <input type="text" value="Check on learner doc"/></p> <p style="text-align: right;">View Return Reasons</p> </div>

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

View Return Reasons

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.

7.9.1.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. The default date will be set to today's date.

Figure 7-50 : Quick grade entry page

Buttons available are

Button	Purpose
	Display the results of the search, based on the entered selection criteria.
	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 set to today's date	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

7.9.2.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.

Quick Grade Entry

Select the learners you wish to enter results for
 Grades for approximately 500 learners can be entered at a time

<input type="checkbox"/>	Learner Code	First name	Last name	DOB	Registration Date
<input type="checkbox"/>	124037	Nancy	Dell'ortiago	22/06/1990	05/09/2018
<input type="checkbox"/>	124036	Mia	Dell'Uomo	22/08/1999	05/09/2018

7-51 : Quick grade entry – Select Learners page

Buttons available are

Button	Purpose
<input type="button" value="Enter Grades"/>	Enter Grades for the selected Learners.
<input type="button" value="Back"/>	Returns to the Quick Grade Entry screen.

7.9.3.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 Entry

Your selection criteria:

Centre : 992/Avrils centre	Site : 992.001/Avrils site
Qualification : 2UAR:Two Units	Unit : All
Reg Group Code : All	

1. Enter results for units already registered without a grade

Last Name	First Name	ULN	Learner Code	Qualification Code	UAN	Unit Code	Unit Title	Date	Grade	Alt. Achievement
Dell'Uomo	Mia	124036		2UAR		2Us	2UA	10/09/2018	Pass	<input type="checkbox"/>
Dell'Uomo	Mia	124036		2UAR	8888	2UC	2UC	10/09/2018	Pass	<input type="checkbox"/>

Save and Request Certificates
Save Back

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:-

7.9.4.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 Files

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).

7.10.1. 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.


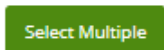
The screenshot shows the 'Quick Grade Entry' interface. At the top, it displays selection criteria: Centre: 952/Avrils centre, Site: 952.001/Avrils site, Qualification: 2U/Alt/Two Units, Units: All, Reg Group Code: All. Below this, there are two main sections:



- 1. Enter results for units already registered without a grade:** This section includes a table with columns: Last Name, First Name, ULN, Learner Code, Qualification Code, UAN, Unit Code, Unit Title, Date, Grade, and Alt. Achievement. Two rows are visible, both for 'Dell'Uomo, Mia' with ULN 124036. The first row has Unit Code 2Ue and Unit Title 2UA, with a grade of 'Pass'. The second row has Unit Code #9888 and Unit Title 2UC, also with a grade of 'Pass'.
- 2. Enter results for units not included above:** This section contains a form for adding new units. It includes fields for Learner Code (set to 'All Learners'), Pathway (set to 'Default'), Pathway Group (set to 'All'), Unit (set to 'M (2Ue) 2UA'), Assessment Date (set to '10/09/2018'), and Grade (set to 'Pass'). There are checkboxes for 'Additional' and 'Alternative Achievement'. A green 'Select Multiple' button is located to the right of the form. An 'Add' button is at the bottom left of the form area.

Below the form, it states 'Rows already added: No new registrations added'. At the bottom, there is a section for '3. Enter details for your import' with fields for 'Filename' and 'Default PO Number', and 'Save and Create Import File' and 'Back' buttons.

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

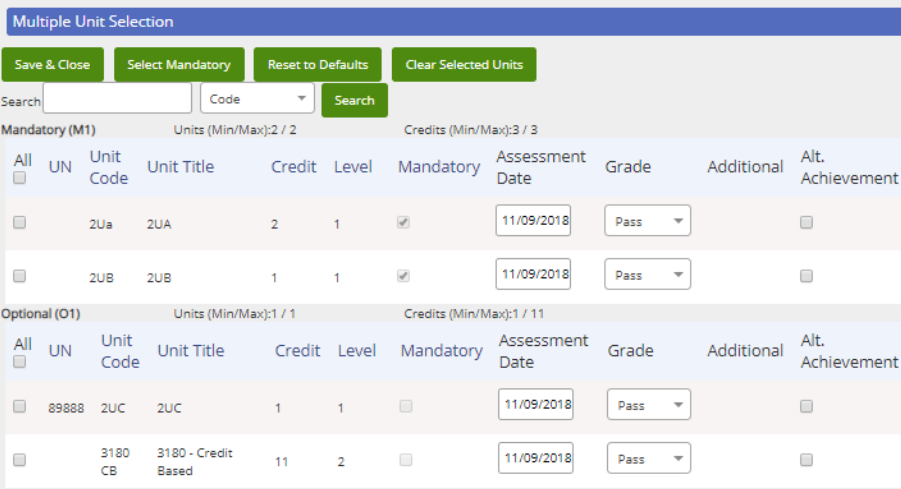
Buttons available are

Button	Purpose
	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.
	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 the data shown/selected to the Import file which is created.
	Returns to the Quick Grade Entry screen.

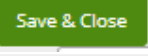




Field Name	Purpose	Validation
filename	Name of the Import file to be created.	Mandatory

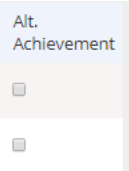
Clicking on the Multiple Units button displays the following (This can be displayed either in a popup window OR within quick grade entry screen.



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

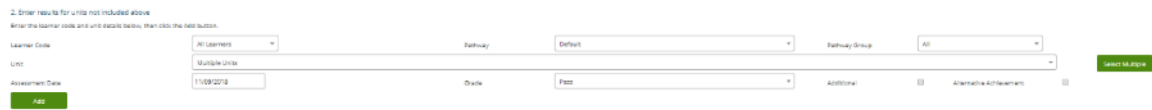
Buttons available are

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

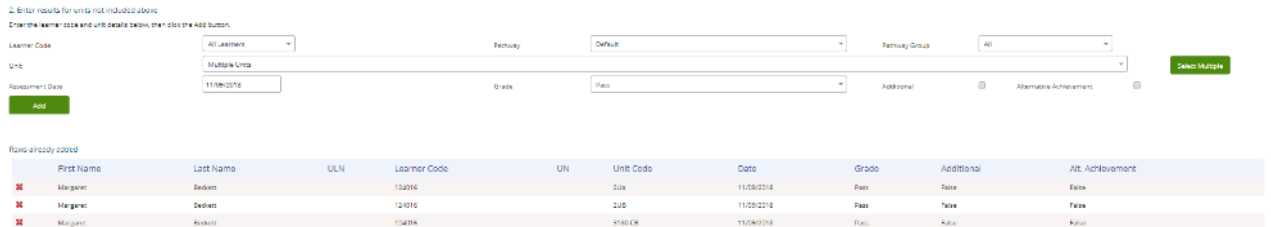


Individual rows can now be flagged as an alternative achievement row.

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).



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).



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.

7.10.2. 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.

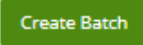

7.11.1. Create Batch

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




Figure 7-56-2: Create Batch page

Buttons available are

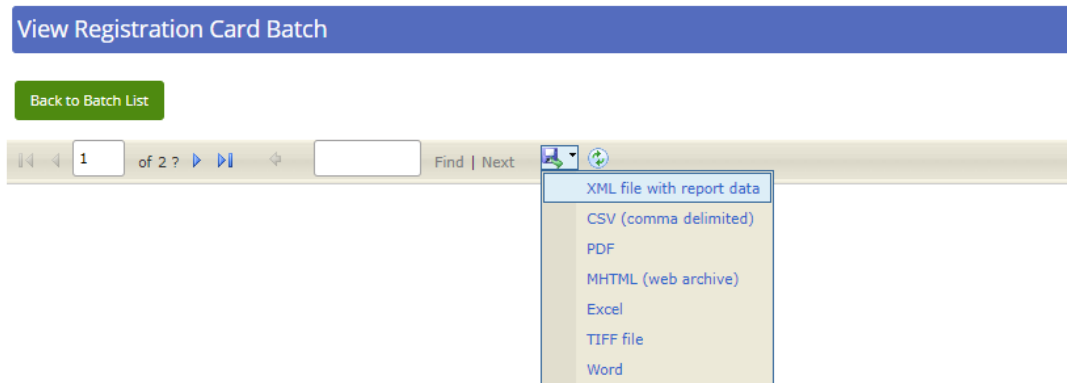
Button	Purpose
	Create a new batch of Registration Cards, based on the entered selection criteria.
	Return to the Learners search screen.

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  to the left of the required registration batch to see the Registration Card details. See section 7.11.2.

7.11.2. 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.



Welcome to XYZ Awarding Organisation

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
	Return to the Registration Card batch list.
	Mark the batch of Registration cards as printed.

Field Name	Purpose	Validation
	Select the format to use for the export of the registration card batch details.	No Validation

7.11 Event Registrations

7.12.1. Event Registration Details

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

The screenshot shows the 'Learner' profile page with the 'Events' tab selected. The learner's details are as follows:


- Learner First Name: Nancy
- Middle Names: (empty)
- Last Name: Dellortigo
- Title: Not Supplied
- Number: 124037
- UUN: (empty)
- DOB: 22/06/1990
- Ethnic Origin: Not Supplied
- Gender: Female
- SCN: (empty)
- Nationality: UNITED KINGDOM
- Prevent Learner Data being shared to third parties: (unchecked)

The 'Events' tab contains the following table:

EventNumber	EventTitle	Code	Title
143	Test Event X	h4c	Hacking the planet

Figure 7-58 : Events tab

7.12.2. Associated Event Info Details

The detail for the associated Event can be viewed by clicking the  in the Events tab or by clicking the Event Info tab for the qualification registration it is associated with.

The screenshot shows the 'Edit Qualification Registration - Hacking the planet' page with the 'Event Info' tab selected. The event details are as follows:

- Event Number: 143
- Status: Approved
- Centre: 172.Centre 1b
- Site: 172.002:Site B
- Qualification: h4c:Hacking the planet
- Start Date: 26/09/2018
- End Date: 27/03/2019

The 'Facilitator' table is as follows:

Facilitator Number	Facilitator Status	Renewal Date	Title	First Name	Last Name	Is Lead
20	Current		Mr	Dar	Kim	Yes

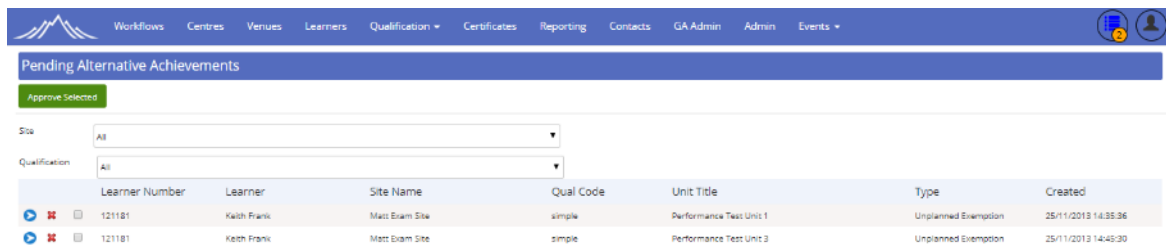
Figure 7-61 : Event information tab

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.



Buttons available are

Button	Purpose
	This approves the selected alternative achievement. (Hidden for centre users)
	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.

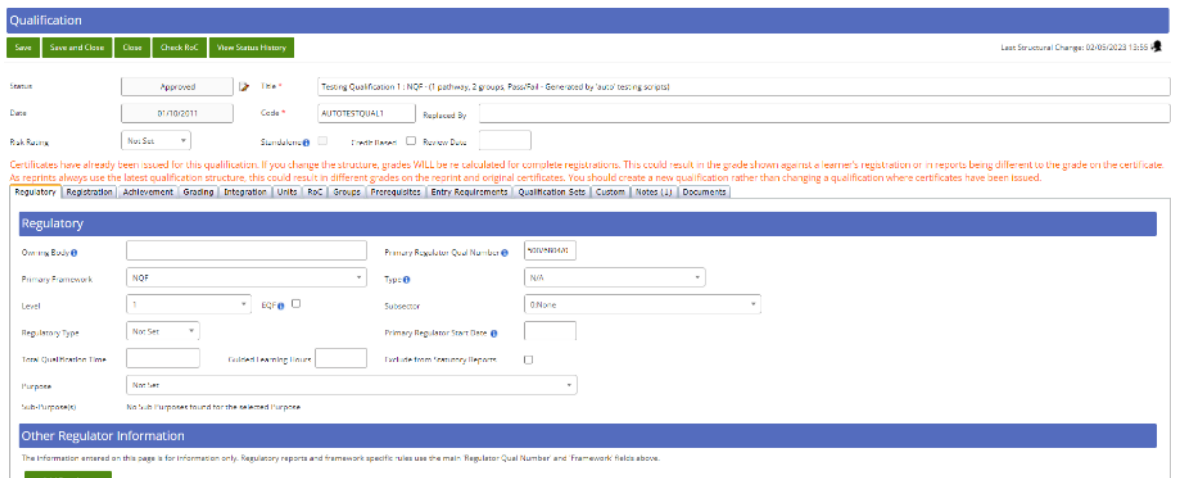


Figure 8-1 : Edit Qualification

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.

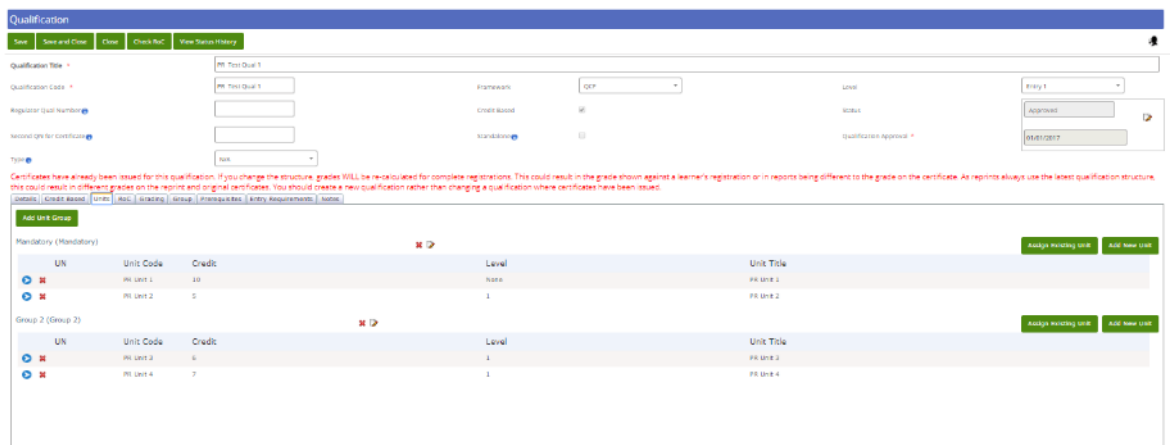


Figure 8-2 : Unit Group Setup

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.

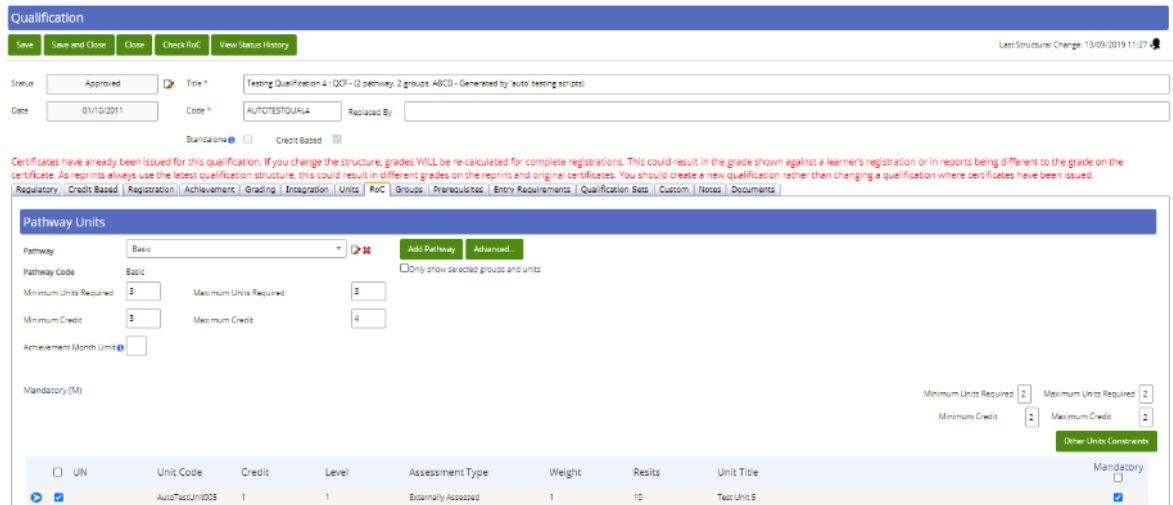


Figure 8-3 : Second Pathway

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.

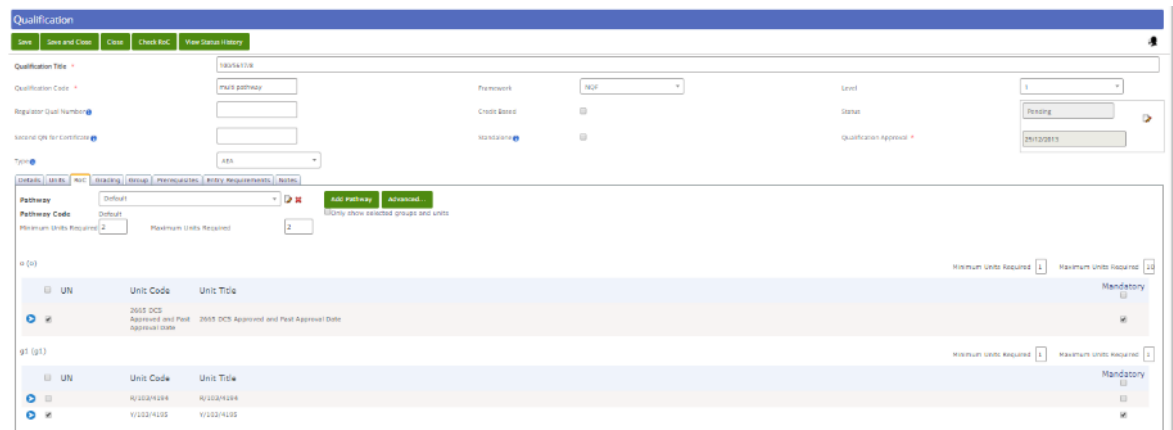


Figure 8-4 : First / Default Pathway

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'.

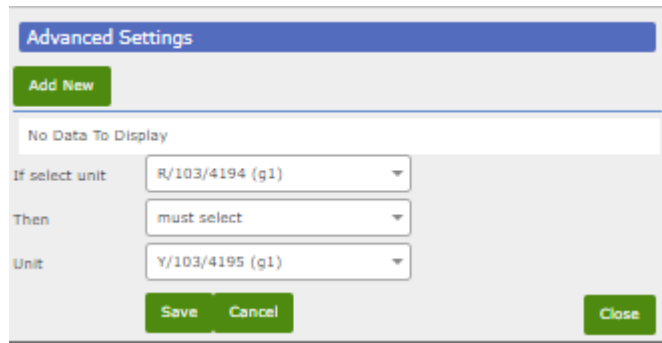


Figure 8-5 : Advanced Settings

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

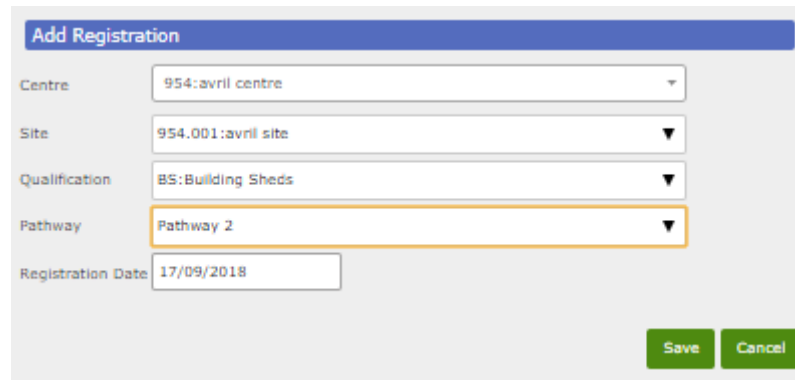


Figure 8-6 : Qualification Registration Pathway selection

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.

QN	Code	Title	Credit	Level	Status	Standalone	Regulatory Type	Registration End	No. of Notes
	PTAAA	Parnassus Testing - Assessment - Alternative Achievement	5	None	Approved	<input type="checkbox"/>	Regulated		0
	PTAARL	Parnassus Testing - Assessment - Alternative Achievement - Prior Learning	1	None	Approved	<input type="checkbox"/>	Regulated		0
	PTAE	Parnassus Testing - Assessment - Elements	2	None	Approved	<input type="checkbox"/>	Regulated		0
	PTBGDIM	Parnassus Testing - Batch Grade Import - Direct Import Mode		None	Approved	<input type="checkbox"/>	Regulated		0
	PTBGH	Parnassus Testing - Batch Grade Import - Custom Headings		None	Pending	<input type="checkbox"/>	Regulated		0
	PTBRCH	Parnassus Testing - Batch Registrations - Custom Headings		None	Pending	<input type="checkbox"/>	Regulated		0
	PTBRDIM	Parnassus Testing - Batch Registrations - Direct Import Mode		None	Pending	<input type="checkbox"/>	Regulated		0
	PTBROIMEX	Parnassus Testing - Batch Registrations - Direct Import Mode - Existing		None	Pending	<input type="checkbox"/>	Regulated		0
	PTCUAQ1	Parnassus Testing - Centre Users - Access - Q1		None	Approved	<input type="checkbox"/>	Regulated		0
	PTCUAQ2	Parnassus Testing - Centre Users - Access - Q2		None	Pending	<input type="checkbox"/>	Regulated		0
	PTCCDQ1	Parnassus Testing - Certification - Certificate Dates - Qual 1		None	Approved	<input type="checkbox"/>	Regulated		0
	PTCCDQ2	Parnassus Testing - Certification - Certificate Dates - Qual 2		None	Approved	<input type="checkbox"/>	Regulated		0
	PTCC	Parnassus Testing - Certification - Certifying units without selecting a qualification		None	Approved	<input type="checkbox"/>	Regulated		0
	PTLRA	Parnassus Testing - Learners - Reasonable Adjustments		None	Pending	<input type="checkbox"/>	Regulated		0
	PTLSP	Parnassus Testing - Learners - Store photo and signature image to learner record		None	Pending	<input type="checkbox"/>	Regulated		0

Figure 8-7 : Qualifications listing page

From here you may carry out the following:-

- [Add New Qualification](#)
- [Delete a Qualification](#)
- [Select Qualifications for Editing](#)
- [Copy a Qualification](#)

8.2.1. 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
	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

8.3.1. 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.

The screenshot shows the 'Qualification' creation interface. At the top, there are tabs for 'Regulatory', 'Registration', 'Achievement', 'Integration', 'Entry Requirements', 'Qualification Sets', 'Custom', 'Notes', and 'Documents'. The 'Regulatory' tab is active, displaying fields for 'Qualification Title', 'Date', 'Qualification Code', 'Replaced By', 'Risk Rating', 'Standalone', 'Credit Based', and 'Review Date'. Below this is a section for 'Regulatory' details, including 'Ongoing Body', 'Primary Framework', 'Level', 'Regulatory Type', 'Inte. Qualification Time', 'Purpose', 'Sub-Purposes', 'Primary Regulator Qual Number', 'Type', 'Subsector', and 'Primary Regulator Start Date'. A note at the bottom states: 'The information entered on this page is for information only. (Regulatory reports and frameworks specific rules use the main 'Regulator Qual Number' and 'Framework' fields above. In order to add information for other regulators you must first 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
Qualification Title	The qualification title	Mandatory, must be entered.
Date	The date the qualification was approved	Mandatory: must be a valid date value
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
Risk rating	Drop down list of risk rating for 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.

8.3.2.Regulatory Information tab

The screenshot shows a web-based form for entering regulatory information. At the top, there are navigation tabs: Regulatory, Registration, Achievement, Grading, Integration, Units, RoC, Groups, Prerequisites, Entry Requirements, Qualification Sets, Custom, Notes, and Documents. The 'Regulatory' tab is active. The form fields are as follows:

- Owing Body: [Text input field]
- Primary Framework: [Dropdown menu with 'NCF' selected]
- Level: [Dropdown menu with '1' selected] and an 'EQF' checkbox.
- Regulatory Type: [Dropdown menu with 'Regulated' selected]
- Total Qualification Time: [Text input field]
- Guided Learning Hours: [Text input field]
- Primary Regulator Qual Number: [Text input field with '50016804/0']
- Type: [Dropdown menu with 'Vocationally-Related Qualification' selected]
- Subsector: [Dropdown menu with '0:None' selected]
- Primary Regulator Start Date: [Text input field]
- Exclude from Statutory Reports: [Checkbox, currently unchecked]
- Purpose: [Dropdown menu with 'Not Set' selected]
- Sub-Purpose(s): [Text area with 'No Sub Purposes found for the selected Purpose']

Below the form is a section titled 'Other Regulator Information' with a note: 'The information entered on this page is for information only. Regulatory reports and framework specific rules use the main 'Regulator Qual Number' and 'Framework' fields above.' There is a green 'Add Regulator' button and a message 'No data to display'.

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
Type	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
----------------	---	----------

8.3.3.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

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 learner 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. Note - Changing the qualification lifetime impacts existing registrations: Expired registrations will be changed to In Progress if the lifetime is extended so that registration expiry is now in the future.	Optional: must be a valid number greater than zero

	If the lifetime of a qualification is shortened, In Progress registrations will be set to Expired if the registration expiry is changed to be in the past.	
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

8.3.4. Achievement Details tab

This tab has two sections Achievement and Certification.

The screenshot shows the 'Achievement' and 'Certification' configuration tabs in the Parnassus system. The 'Achievement' tab includes fields for 'Min. Assessment Age', 'Learner: EA Ratio', 'Learner: IA Ratio', 'Must pass all units', 'Max. Number Of Exemptions', 'Automatically Request Full Certificate on Cert Due', and 'Units required at level of qualification or above'. The 'Certification' tab includes checkboxes for 'Exclude from Certificates', 'Allow printed Qualification Certificates', and 'Allow eCertification', along with fields for 'Certificate Title', 'Certification Start', 'Certificate Expires (months)', 'Certification End', 'Our Certification End', 'Min. Certification Age', 'Earliest Certification Period (days)', 'Qualification Template', 'Unit Template', 'Partial Template', and 'Transcript Template'.

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	Optional

	screens in Parnassus. However in future versions we may introduce checks on the Events, Registrations screens etc.	
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
Automatically Request Full Certificate on Cert Due	If selected, the registration will automatically have the 'Request Full Certificate' flag set to true when the registration becomes 'Cert Due'.	Optional
Units required at level of qualification or above	Can be used to specify the minimum units that need to be achieved for the qualification – can be used for credit and non-credit based qualifications	Optional

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

8.3.5. Integration Details tab

Regulatory | Registration | Achievement | **Integration** | Entry Requirements | Qualification Sets | Custom | Notes | Documents

Integration

Exclude from PLR

UCAS Points Compatible UCAS Points Tariff

Finance

Chargeable Product Code (GP)

Fee % at Registration Fee % at Certification

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

8.3.6. Qualification Sets tab

Reports always use the latest qualification structure, this could result in different groups on the reports and original certificates. You should create a new qualification if you want to change a qualification with

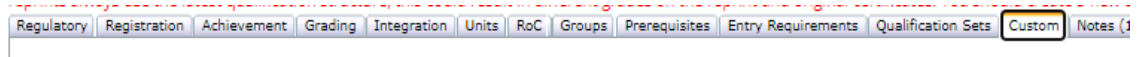
Regulatory | Registration | Achievement | Grading | Integration | Units | RoC | Groups | Prerequisites | Entry Requirements | **Qualification Sets** | Custom | Notes (1) | Documents

Qualification Sets

Code	Title	Created	Last Modified By
Q501	Qual Set 01	08/11/2019 15:48:43	RachelAQAdmin

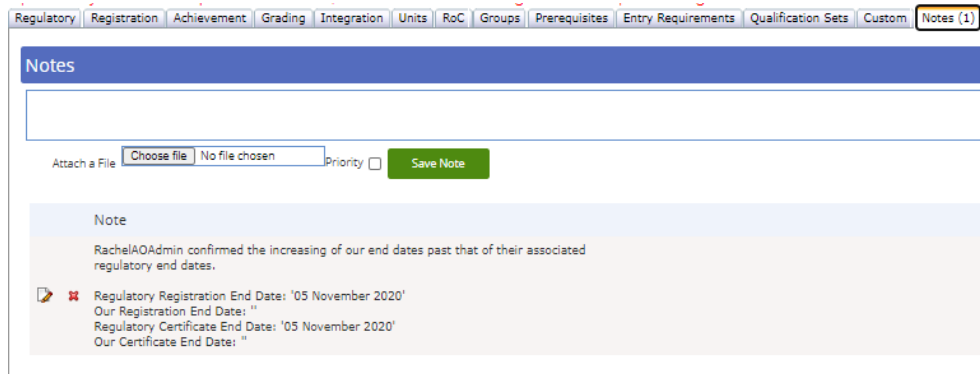
A list of any qualification sets that the qualification is part of.

8.3.7. Custom tab



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

8.3.8. Notes tab



You can save notes and attachments concerning the qualification here.

8.3.9. 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).

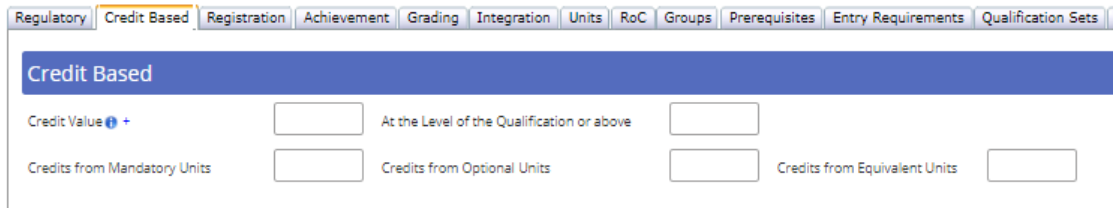

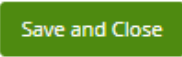




Figure 8-9 : Credit Based Qualification details page

Field Name	Purpose	Validation	Use
Credit Value	Specify the total credit value that has to be accumulated for the qualification. <ul style="list-style-type: none"> Awards (1 to 12 credits) Certificates (13 to 36 credits) Diplomas (37 credits or more). 	Mandatory.	Used to calculate when Learner has “Achieved” the qualification. The total of their Unit Credit Values must equal this Value.

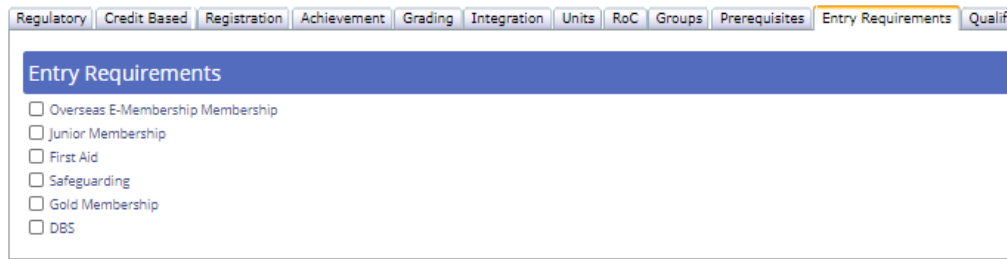
	This should be set to the minimum credit value which satisfies the pathways set up for the qualification. Used to determine the Qualification Registration Status.		
Credits from Mandatory Units	Specify the total credit value that can be accumulated from mandatory units.	None	Information Only
Credits 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

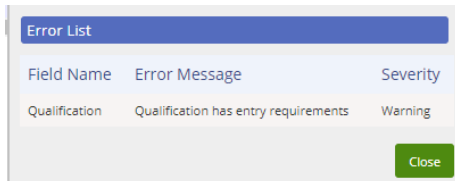
Button	Purpose
	Save the record with the data entered and remain on this page to continue editing the record. The tabs for Units, Rules of Combination, Grading and Notes will not become available until after a new Qualification has been saved.
	Save the record and return to the Qualifications Listing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

8.3.10. 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'.



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



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:

8.3.11. Severity of 0

Certification routine will not be affected

8.3.12. 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:

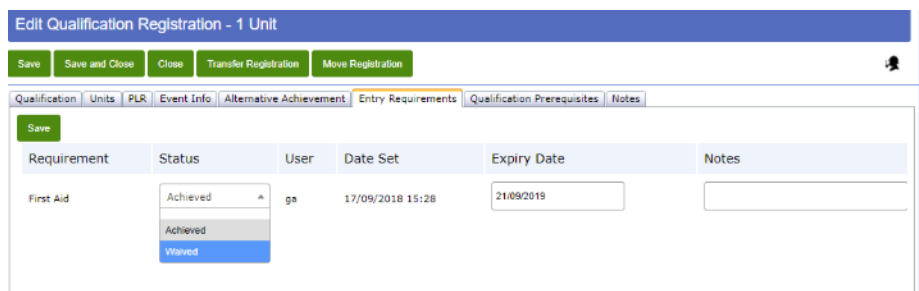
Entry Requirement #Name# has not been met or has expired.

8.3.13. 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:

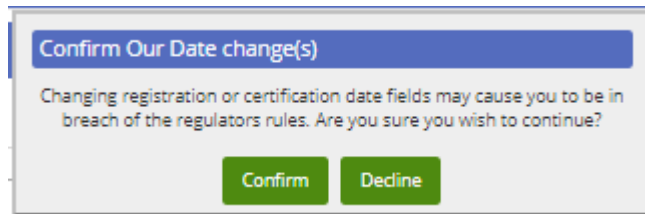
Warning: Entry Requirement #Name# has not been met or has expired.

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.



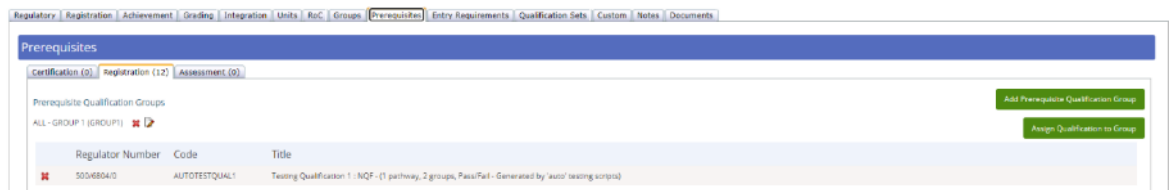
8.3.14. Our Registration End/Our Certification End

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.




8.3.15. 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.



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  icon, you will then be prompted as to whether you really wish to delete this record as shown below.

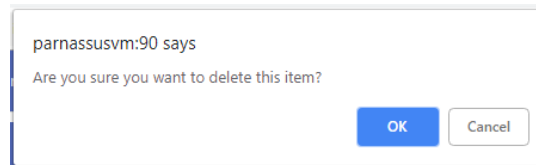



Figure 8-10 : Confirmation of deleting a qualification

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  icon to select the record.

You may now edit the record's primary details as described in section 8.3 and also manage [units](#), [Rules of combination](#), [grading](#) and [notes](#).

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 Close	Close	Check RoC	View Status History	Last Structural Change 23/09/2019 16:26 
Qualification Title *	Testing Qualification 1 - NGF - CI pathway, 2 groups, Pass/Fail - Generated by auto testing script				
Certificate Title					
Qualification Code *	AUTOTESTQUAL1	Framework	NGF	Level	1
Regulator Qual Number	50046804/0	Credit Based	<input type="checkbox"/>	Status	Approved 
Second GN for Certificate		Standalone	<input type="checkbox"/>	Qualification 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.

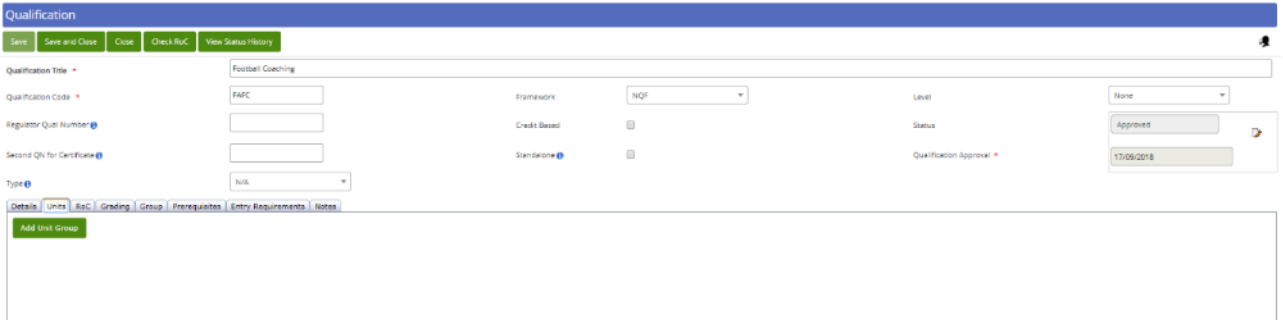


Figure 8-11 : Units tab on qualification details page

8.7.1. 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.

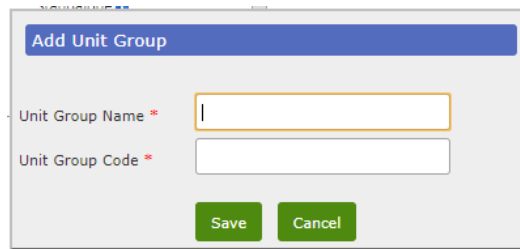


Figure 8-12 : In-page popup for adding and editing unit groups

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 7.4.4 and Qualification Group Code in section 7.8.3.	Mandatory

Buttons available are

Button	Purpose
	Save the unit group
	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.

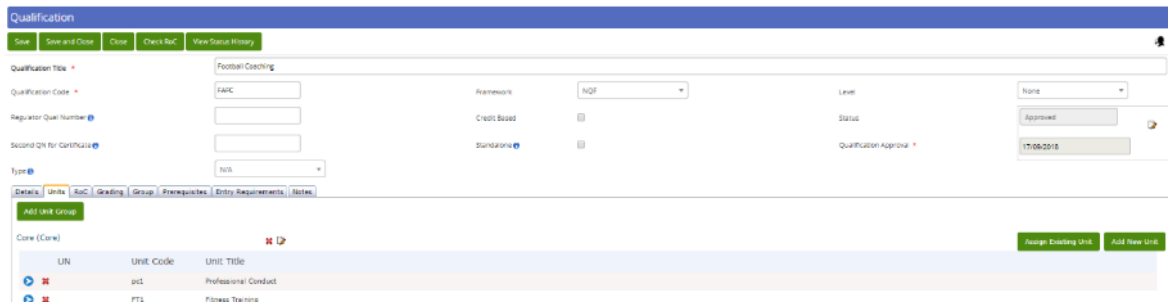




Figure 8-13 : Units tab on qualifications page with groups added showing available options

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  icon, this will show the in-page popup as described earlier to allow you to alter the unit group name.

8.7.2. 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.

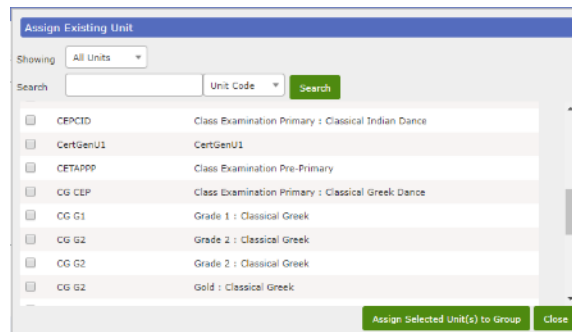


Figure 8-14 : In-page popup for allocating existing units

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.

You can search for units by unit code, unit name or UAN.

8.7.3. 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.

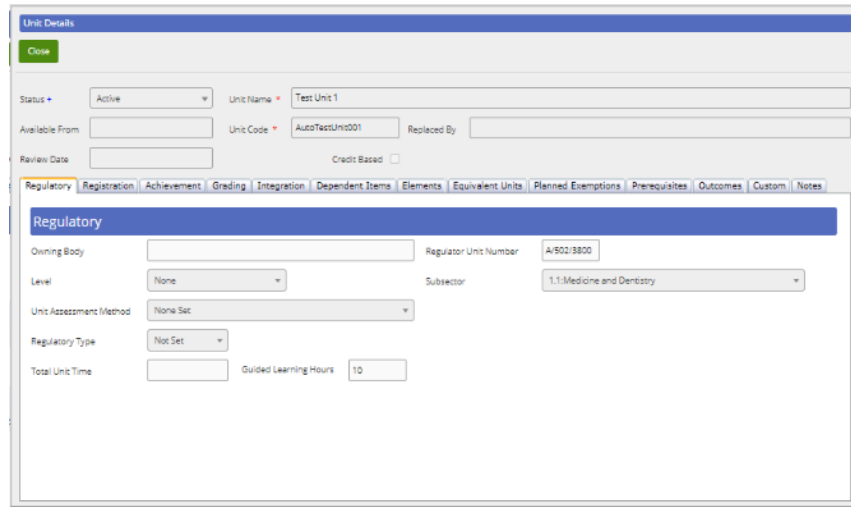
In the event that a unit exists with the entered unit code you will receive an additional option in the buttons

Assign Existing Unit

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

8.7.4.Editing a Unit

To view a unit click on the  icon against the unit you wish to see, this will display an in-page popup as shown below, on which you can view the details.



The screenshot displays an in-page popup titled "Unit Details". At the top left is a "Close" button. Below it, the "Status" is set to "Active" and the "Unit Name" is "Test Unit 1". There are input fields for "Available From", "Unit Code" (containing "AutoTestUnit001"), and "Replaced By". A "Review Date" field and a "Credit Based" checkbox are also present. A horizontal menu of tabs is visible, with "Regulatory" selected. Under the "Regulatory" tab, the following fields are shown: "Owning Body" (empty), "Regulator Unit Number" (A/502/3800), "Level" (None), "Subsector" (1.1.Medicine and Dentistry), "Unit Assessment Method" (None Set), "Regulatory Type" (Not Set), "Total Unit Time" (empty), and "Guided Learning Hours" (10).

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

Figure 8-16 : RoC tab on qualification details page

8.8.1. 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.

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 the pathway
	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.

Figure 8-18 : Dropdown list on RoC tab for selecting the pathway to edit

8.8.2.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  icon, this will show the in-page popup as described in section 8.8 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

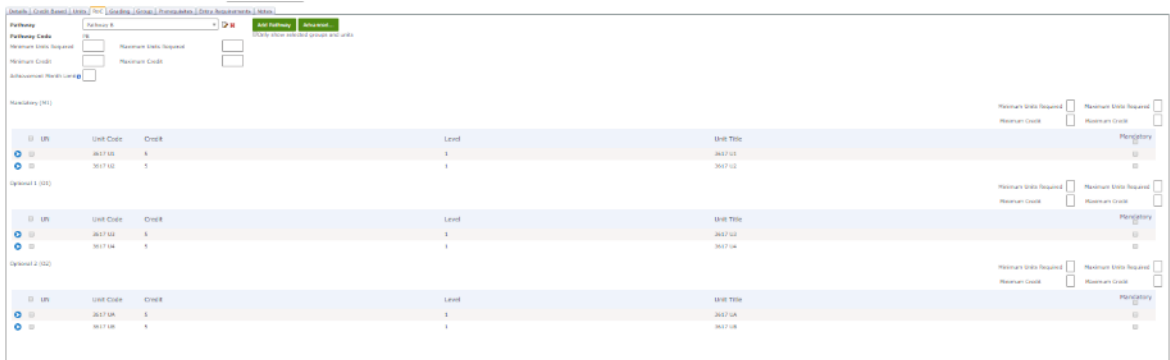


Figure 8-19 : Unit selection grids within the pathways tab

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.

8.8.3. Deleting a Pathway

You can delete a pathway by clicking the delete icon as shown below



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).

8.8.4. 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

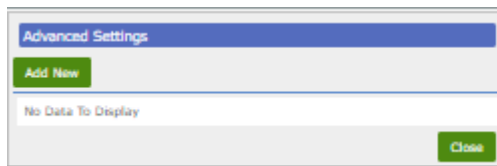


Figure 8-20 : In-page popup showing advanced settings for a pathway with no settings added

Click on the 'Add New' button to add a new setting, this will expand the popup as follows.

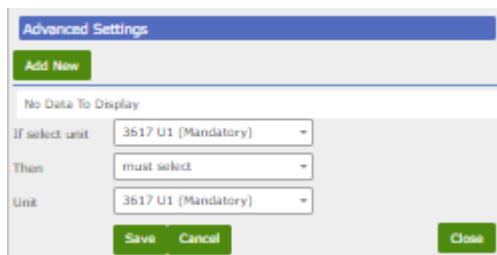







Figure 8-21 : In-page popup for advanced settings expanded for adding and editing settings

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 the advanced setting

	Cancel adding a new advanced setting to this pathway
	Return to the RoC tab
	Add another advanced setting

Once an advanced setting has been added it will be displayed within a grid in the popup, click the  icon to edit the setting, or delete it by clicking the  icon and confirming you wish to delete it.

8.8.5. 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.

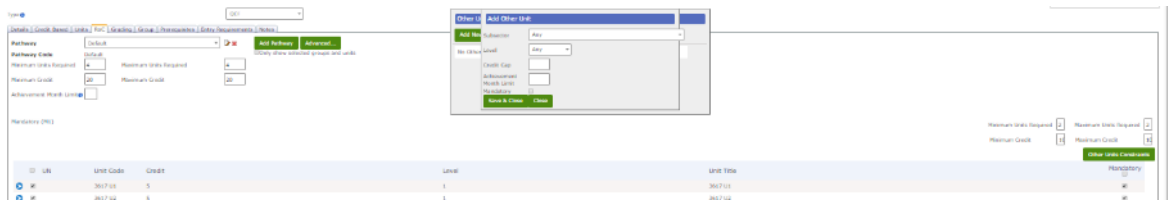




Figure 8-22 : In-page popup for other Units Constraints

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

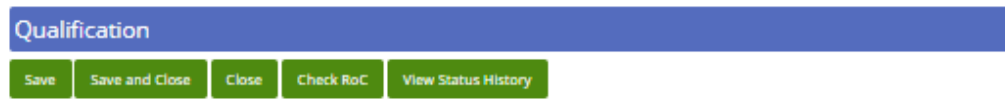
Buttons available are

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.

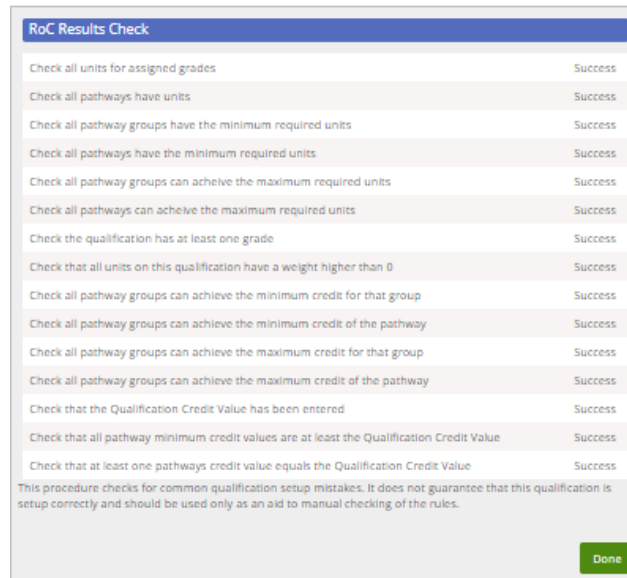
8.8.6. ROC Checker

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.



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

8.8.7.Editing a Unit

If you click on the folder icon next to a unit on the ROC tab, then the following is displayed

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

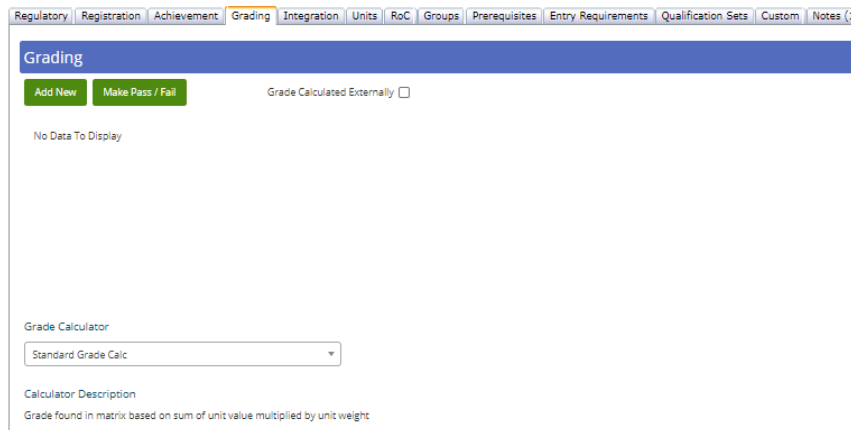


Figure 8-23 : Grading tab on qualification details page

To add a new grade click on the 'Add New' button, an in-page popup will then be displayed as shown below

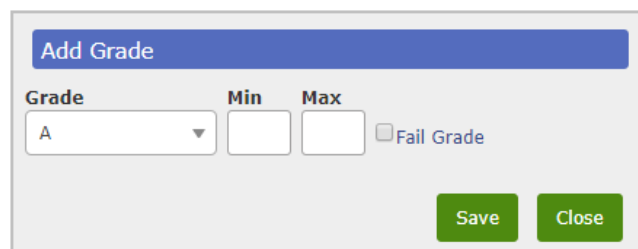






Figure 8-24 : In-page popup to add a grading to the qualification

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 \leq Max if specified
Max	The maximum value for this grade	Must be a valid whole number ≥ 0 and \geq Min if specified
Fail Grade	Flag to indicate if achieving this grade is a failure	N/A

Buttons available are

Button	Purpose
	Save the grade
	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.

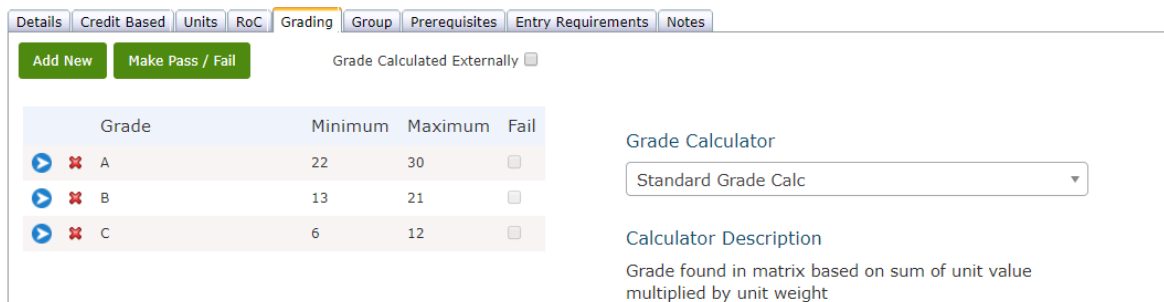
8.10 Understanding Qualification Grade Calculation

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.



Details | Credit Based | Units | RoC | **Grading** | Group | Prerequisites | Entry Requirements | Notes

Add New | Make Pass / Fail | Grade Calculated Externally

Grade	Minimum	Maximum	Fail
  A	22	30	<input type="checkbox"/>
  B	13	21	<input type="checkbox"/>
  C	6	12	<input type="checkbox"/>

Grade Calculator
Standard Grade Calc

Calculator Description
Grade found in matrix based on sum of unit value multiplied by unit weight

Qualification Grades

8.10.1. 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.

8.10.2. Grade Calculation Trigger

A Learners overall Qualification Registration Grade is (re)calculated when grades are recorded against its Units Registrations.

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.

Unit Code	Unit Name	Reg Date	Type	Credit	Level	Grade	RPL	Attempts on reg (All)	Alt Ach	Pre-Req	Res Rel Date	Inc On Award	Use Best	Part Req	Unit Req
AutoTestUnit005	Test Unit 5	10/07/2018	M	1	1		<input type="checkbox"/>	0 (0)		No		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Each **Unit** which is part of the Qualification must be setup with the possible grades attainable, including “Fail Grades”.

Test Unit 8

Save
Save and Close
Close

Unit Name *

Unit Code *

UN

Level +

Credit Based Unit

Default Assessment Type

Apply this Type to all Pathways

Default Weight **Default Resits**

Status +

Details

Grading

Dependent Items

Elements

Equivalent Units

Planned Exemptions

Prerequisites

Notes

Add New
Make Pass / Fail

	Grade	Value	Minimum	Maximum	Fail
<input type="checkbox"/>	A	3	6	7	<input type="checkbox"/>
<input type="checkbox"/>	B	2	4	5	<input type="checkbox"/>
<input type="checkbox"/>	C	1	2	3	<input type="checkbox"/>
<input type="checkbox"/>	D	0	0	1	<input type="checkbox"/>

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)

Units without marks or grades

These can be used with the Assessment Type ‘Not Assessed’

These units can appear on the Full certificate but will not be included on Unit and Partial certificates.

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.

Add new Unit

Save
Save and Close
Close

Unit Name *

Unit Code *

UN

Level +

Credit Based Unit

Default Assessment Type

Apply this Type to all Pathways

Default Weight Default Resits

Status +

Details
Grading
Dependent Items
Elements
Equivalent Units
Planned Exemptions
Prerequisites

Notes

Add New
Make Pass / Fail

	Grade	Value	Minimum	Maximum	Fail
	A	10	76	100	<input type="checkbox"/>
	B	5	40	75	<input type="checkbox"/>
	E	0	20	39	<input checked="" type="checkbox"/>
	Fail	0	0	19	<input checked="" type="checkbox"/>

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
	A	10	76	100	<input type="checkbox"/>
	B	5	40	75	<input type="checkbox"/>
	E	0	20	39	<input checked="" type="checkbox"/>
	Fail	0	0	19	<input checked="" type="checkbox"/>

Unit Grades

Qualification has Following Grades available:

	Grade	Minimum	Maximum	Fail
	A	21	30	<input type="checkbox"/>
	C	11	20	<input type="checkbox"/>
	E	0	10	<input type="checkbox"/>

Qualification Grades

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	B	5	10
Unit2	1	A	10	10
			Sum	20

The value of **20** is compared against the grade boundaries for the Qualification

Grade	Minimum	Maximum	Fail
A	21	30	<input type="checkbox"/>
C	11	20	<input type="checkbox"/>
E	0	10	<input type="checkbox"/>

↑

The overall Qualification Grade in this example is therefore recorded as a “C” grade as can be seen.

8.10.3. 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.

Gordon Associates

- Unit1 – Weight: 1
- Unit2 – Weight: 1
- Unit3 – Weight: 1
- Unit4 – Weight: 1
- Unit5 – Weight: 1

All **Units** have the following Grades available.

Add New
Make Pass / Fail

	Grade	Value	Minimum	Maximum	Fail
▶ ✘	Pass	1	1	1000	<input type="checkbox"/>
▶ ✘	Fail	0	0		<input checked="" type="checkbox"/>

Unit Grading Tab

Qualification has Following Grades available:

Add New
Make Pass / Fail
Grade Calculated Externally

Details
Credit Based
Units
RoC
Grading
Group
Prerequisites
Entry Require

	Grade	Minimum	Maximum	Fail
▶ ✘	Pass	1	1000	<input type="checkbox"/>
▶ ✘	Fail	0	0	<input checked="" type="checkbox"/>

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.

Therefore the Overall Qualification Grade is calculated thus:

“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

The value of **5** is compared against the grade boundaries for the Qualification

Grade	Value	Minimum	Maximum	Fail
Pass	1	1	1000	<input type="checkbox"/>
Fail	0	0		<input checked="" type="checkbox"/>

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.

8.10.4. 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.

The screenshot shows the 'Unit Registration Details' interface. Under the 'Grading' tab, the 'Mark' is 78 and the 'Element' is 'Theory'. Below this is an 'Attempts' table with the following data:


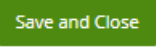


Grade	Assessment Date	Assessment Venue	Void	Last Modified Date	User	Alternative Achievement	Elements	Last LRS Upload	Release Date	Expiry Date
Pass	24/09/2018		<input type="checkbox"/>	24/09/2018	ga	No	Enthusiasm 24/09/2018 Mark:40.00 Practical 24/09/2018 Mark:63.00 Theory 24/09/2018 Mark:78.00			

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

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.	Optional
	Not selected to create another assessment.	

Buttons available are

Button	Purpose
	Add the Grade achieved.
	Saves any data changes.
	Returns to the Edit Qualification Registration – Units screen.
	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.

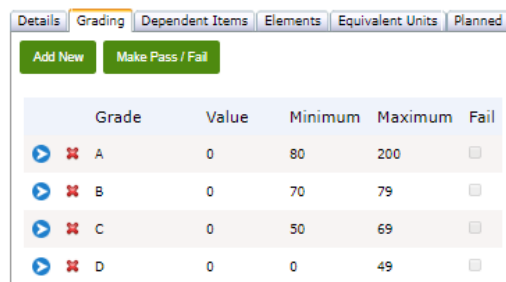
Worked Example

In the above example (See Figure 8-25 : Element Grade Entry), the overall grade is calculated as follows:

Element	Mark	Weight	Total
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.



Grade	Value	Minimum	Maximum	Fail
A	0	80	200	<input type="checkbox"/>
B	0	70	79	<input type="checkbox"/>
C	0	50	69	<input type="checkbox"/>
D	0	0	49	<input type="checkbox"/>

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.

8.11.1. Qualification Set Up

Set the Qualification to be the Other Framework and select Credit Based, Type to “SVQ”, and the Level as you require.

The screenshot shows the 'Regulatory' form in the Parnassus system. The form is titled 'Regulatory' and has a blue header. Below the header, there are several fields and options for configuring a qualification. The 'Owning Body' field is empty. The 'Primary Framework' dropdown is set to 'Other'. The 'Level' dropdown is set to '1'. The 'EQF' checkbox is unchecked. The 'Type' dropdown is set to 'Scottish Vocational Qualification'. The 'Subsector' dropdown is set to '0:None'. The 'Primary Regulator Qual Number' field is empty. The 'Credit Based' checkbox is checked. The 'Registration', 'Achievement', 'Grading', 'Integration', 'Units', 'RoC', 'Groups', 'Prerequisites', 'Entry Requirements', 'Qualification Sets', 'Custom', 'Notes (1)', and 'Documents' tabs are visible at the top of the form.

8.11.2. Unit Set Up

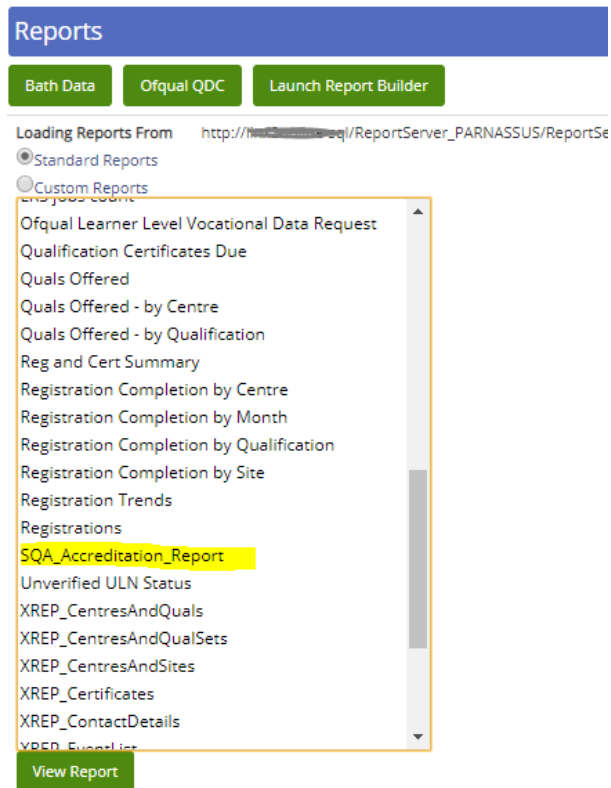
Set Credit Based Unit, Credit value and Level as you require

The screenshot shows the 'Add new Unit' form with the following fields and values:

- Unit Name: Credit
- Unit Code: C1
- UN: (empty)
- Level: 1
- Credit Based Unit:
- Default Assessment Type: Externally Assessed
- Default Weight: 1
- Default Resits: 0
- Status: Active
- Credit Value: 5 (Credit Based Only)
- Guided Learning Hours: (empty)
- Total Unit Time: (empty)
- Unit Expiry Date: (empty)
- Result Release Date: (empty)
- Operational Start Date in Centres: (empty)
- Unit Available From: (empty)
- Certificate Template: StandaloneUnitCertificateBatch

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.



8.13 SQA Statutory Reporting - Information Provided By SQA

SQA Accreditation Data Requirements from June 2011

8.13.1. 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.**

8.13.2. 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

8.13.3. 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 www.sqa.org.uk/accreditation

8.13.4. SQA Defined report

Awarding Body	<i>Please enter the full name of the approved awarding body</i>
Registrations	<i>Please enter the number of registrations against each accredited qualification</i>
Certifications	<i>Please enter the number of certifications against each accredited qualification</i>
Qualification Title	<i>Please enter the SQA accredited qualification title</i>
Code	<i>Please enter the four digit accreditation code</i>
Level	<i>Please enter the two digit level code</i>
Qualification Type	<i>Please enter the qualification type, this will either be 'SVQ', 'Regulatory' or 'Other'</i>

8.13.5. SQA Contact

Karen MacGregor
Information Officer
SQA Accreditation
Tel: 0845 213 5247

8.14 Qualification Sets

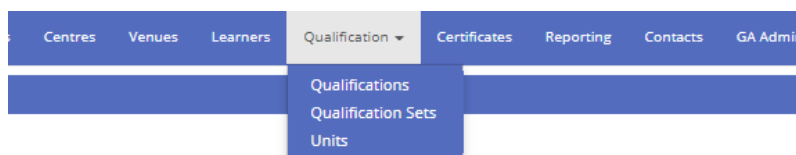
Qualification-Sets are predefined groups of Qualifications which make up a higher level of achievement. These are commonly used to model apprenticeships.

Parnassus allows:

- Definition of Qualification-Sets
 - Name, Code and Qualifications which make up the Set
- Recording of “Qualification-Set” Offered by Sites
 - Similar to Qualification Offered
- Registration of Learners onto Qualification-Sets
 - This creates individual Qualification Registrations for each of the constituent Qualifications making up the set

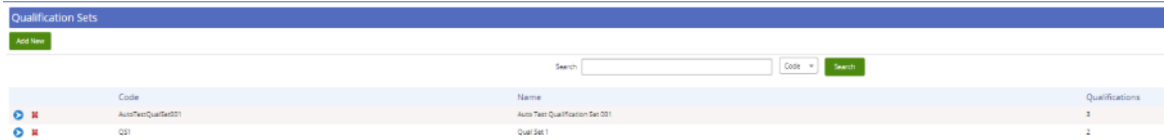
8.14.1. Adding and Editing Qualification Sets

This menu button accessed as part of the Qualification menu drop down list allows you to access the Qualification Sets set up in Parnassus.



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.

Gordon Associates



>> Clicking on “Add New” or the Edit icon will take you to the Qualification-Set details shown below:



>> 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.

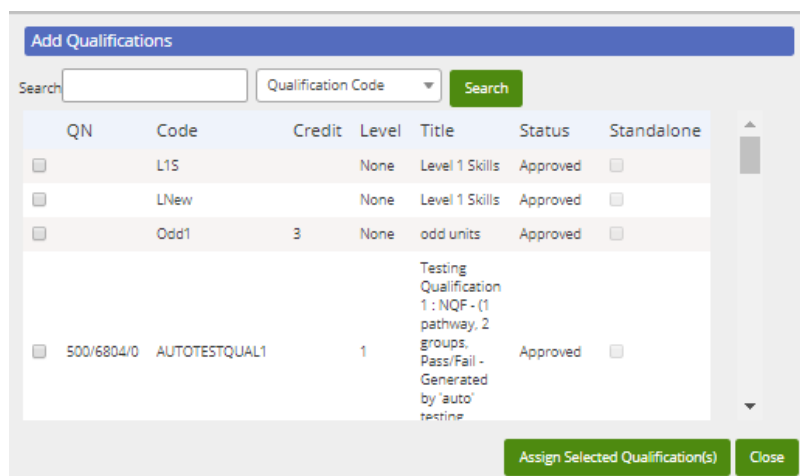
>> Click “Add New Qualification” to launch the popup form shown below, allowing you to choose one or more Qualification to add to the Qualification-Set.

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:

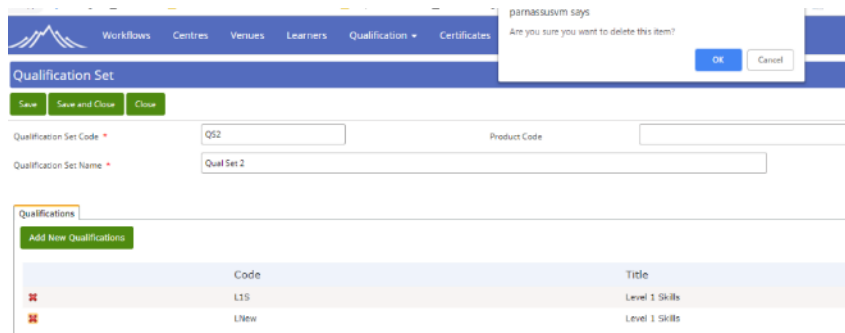
- Qualification Code
- QN
- Qualification Title

>> 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.



Removing Qualifications from a Qualification-Set

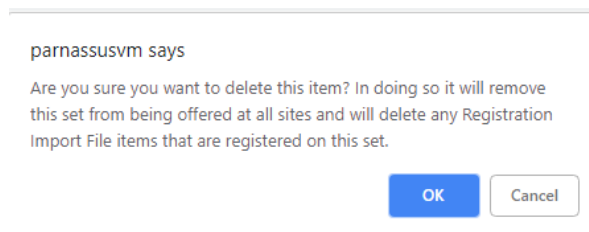
Qualifications on the Qualification-Set can be removed from the Qualification-Set by clicking the red-cross (✖) next to the appropriate Qualification. This will not delete the under-lying Qualification from Parnassus.



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.



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.

9.1 Units Listing Page

When you have clicked on the Units option on the Qualification drop down you will be presented with the following page.

UN	Code	Title	Credit	Level	Status	Regulatory Type	Registration End	No. of Notes
	SSIS	Stream to SHOUTcast / ICEcast Server		None	Active			0
	SPNB	StudentProfessionalIB		Entry 3	Active			0
	TAD	TAD		None	Active			0
A/502/3800	AutoTestUnit001	Test Unit 1		None	Active			0
	AutoTestUnit010	Test Unit 10	1	2	Active			0
	AutoTestUnit011	Test Unit 11 (elements)	1	1	Active			0

Figure 9-1 : Units listing page


8.14.2. Unit Search

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
	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.

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.

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 From	The date that the unit is available from for Credit Based units	Optional: must be a valid date
---------------------	---	--------------------------------

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

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 the record with the data entered and remain on this page to continue editing the record.
	Save the record and return to the Units Listing page as shown in section 9.1.
	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 8.7.2.

9.2.1. Regulatory Details Tab

This tab shows the details of regulatory information.

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

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

9.2.2. Registration Details Tab

This tab shows the details of registration information.

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

9.2.3 Achievement Details Tab

This tab shows the details of achievement information. It has two sections for Achievement and Certification information.


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
Maximum mark	This will be validated on manual mark entry and grade import. The default will be 100. The unit grade can be calculated from the mark. Please contact Gordon Associates if you are interested in using this functionality.	Optional
Credit Value (Credit based Only – enabled when Credit based unit is	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	Mandatory

ticked see Figure 9-4 below)	represents 10 hours notional learning. (this equals Guided Learning Hours (see below) + self study time etc.)	
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

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.

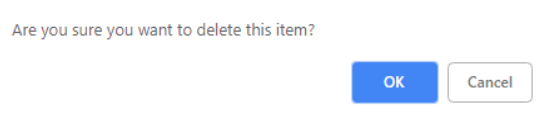



Figure 9-5 : Confirmation of deleting a unit

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  icon to select the record. You will then be presented with a page displayed in a popup window similar to the one below.

Grade	Value	Minimum	Maximum	Fail
Pass	1	50	100	<input type="checkbox"/>
Fail	0	0	49	<input checked="" type="checkbox"/>

Figure 9-6 : Popup window for editing a unit

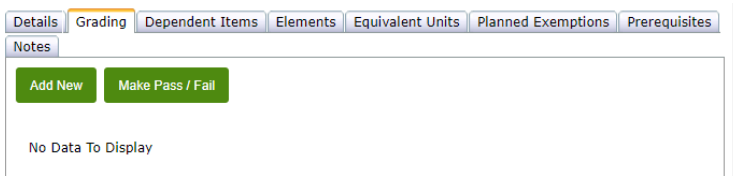
From here you can change the unit’s details, for a list of the field definitions see section 9.2.

Additional buttons available when editing the unit are

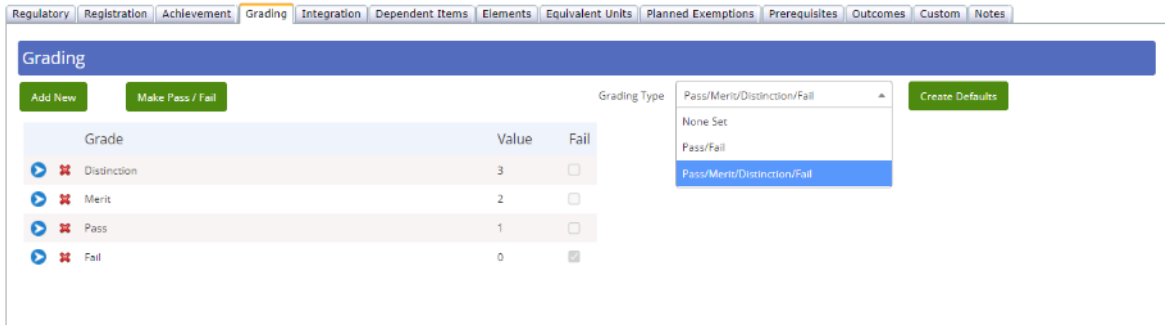
Button	Purpose
Apply this Type to all Pathways	
Apply this Weight to all Pathways	
Apply this Resists to all Pathways	

9.4.1. Grading Tab

To automatically add a pass and fail grade, click on the 'Make Pass/Fail' button.



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.



To add a new customisable grade, click on the 'Add New' button and an in-page popup will then be displayed as shown below.

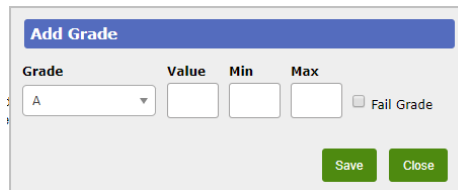






Figure 9-7 : In-page popup for adding a new unit grade

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 \leq Max if specified
Max (not currently used)	The maximum value for this grade	Must be a valid whole number ≥ 0 and \geq Min if specified
Fail Grade	Flag to indicate if achieving this grade is a failure	N/A

Buttons available are

Button	Purpose
	Save the grade
	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  icon to edit the grade, or delete it by clicking the  icon and confirming you wish to delete it.

9.4.2.Integration Tab

The integration tab shows the details of the integrated items you may have in two sections integration and finance.

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

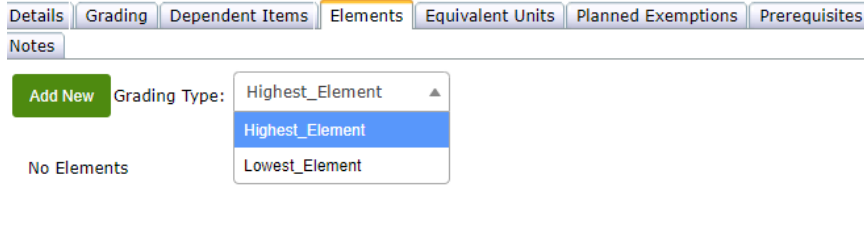
9.4.3.Dependent Items Tab

The dependent items tab shows all of the qualifications which share the unit which is being edited.

Figure 9-8 : Units - Dependent Items Tab

9.4.4.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.



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 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.

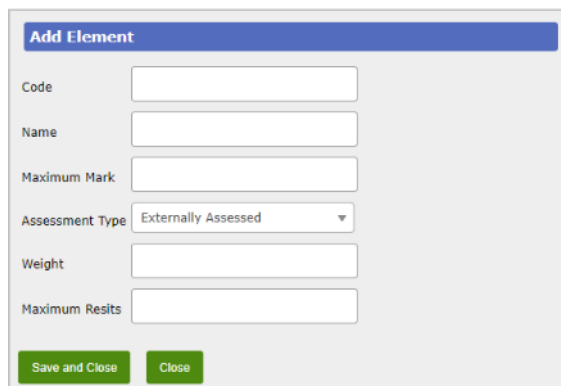
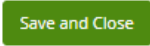



Figure 9-9 : In-page popup for adding a new element

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 the element and close the popup
	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.

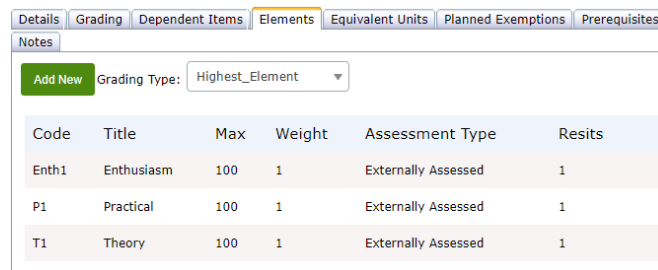


Figure 9-10 : Unit Element List

9.4.5.Editing Elements

Elements can be editing by clicking the icon (▶) next to the Unit's Element you wish to edit.

Code	Title	Max	Weight	Assessment Type	Resits
▶ ✖ e1	Enthusiasm	100	1	Externally Assessed	1

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
<input type="text" value="e1"/>	<input type="text" value="Enthusiasm"/>	<input type="text" value="100"/>	<input type="text" value="1"/>	<input type="text" value="Externally Assessed"/>	<input type="text" value="1"/>

9.4.6.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 pop up form, enter a code and description which will help identify the specific equivalency:

>> 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.

>> Click Save and Close

Additional Equivalent Units can be recorded as above.

The Equivalent Units tab will list all the Units considered equivalent.

Details		Grading	Dependent Items	Elements	Equivalent Units	Planned Exemptions	Prerequisites
Notes							
Add New Equivalency							
		Equivalency Code		Description			
		Unit A		Unit A City & Guilds			
		Unit B		Unit B 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 next to the unit whose equivalency you wish to edit.
 >> Edit the popup form as necessary:
 >> Click "Save and Close"

9.4.7.Planned Exemptions

This has been designed in line with QCA document “QCA/09/4284 – Exemptions in the Qualification and Credit Framework”

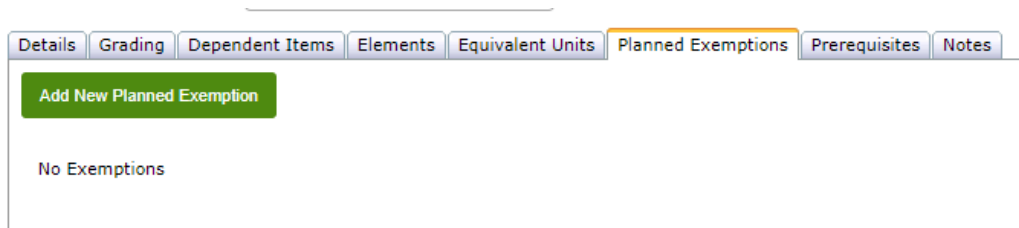
Planned Exemptions allow the Awarding Body to predefine any type of exemption which they agree or design when setting up a Qualification and its Unit.

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:



>> Click “Add New Planned Exemption”

>> The “Add Planned Exemption” popup form will appear:

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

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”.

9.4.8. 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 Outcome Assessment Criteria can now also be added Please contact Gordon Associates if you are interested in this feature and require further information.](#) Unit Outcomes can be added and saved in the Units Outcomes tab as below:

To add unit outcomes click the  button and add the outcome code and outcome title in the popup as below:

Each unit outcome can have assessment criteria added as below – please contact Gordon Associates if you are interested in using this.

Add Unit Outcome

Code

Title

Assessment Criteria

No Assessment Criteria

Assessment Criteria

Assessment Criteria

Criteria Code

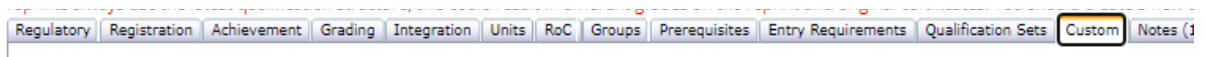
Criteria Title

Criteria Description

Mandatory Delivery Content

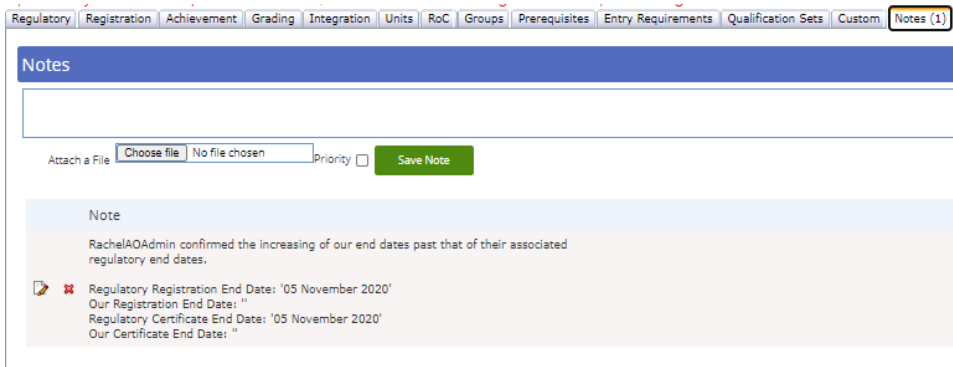
Evidence Requirements

9.4.9. Custom Tab




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

9.4.10. Notes Tab

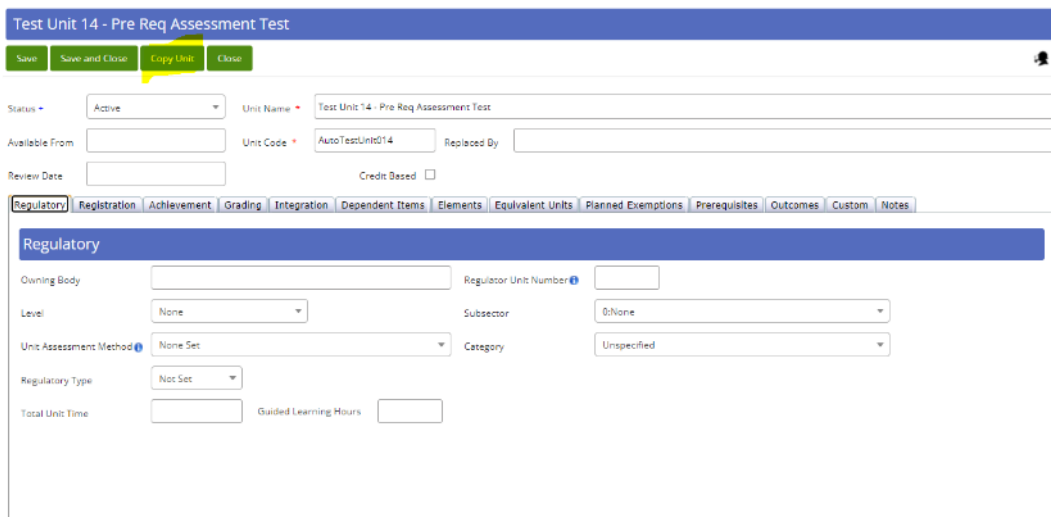


You can save notes and attachments concerning the unit here.

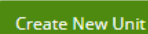
9.5 Copying a Unit

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  icon to select the record.

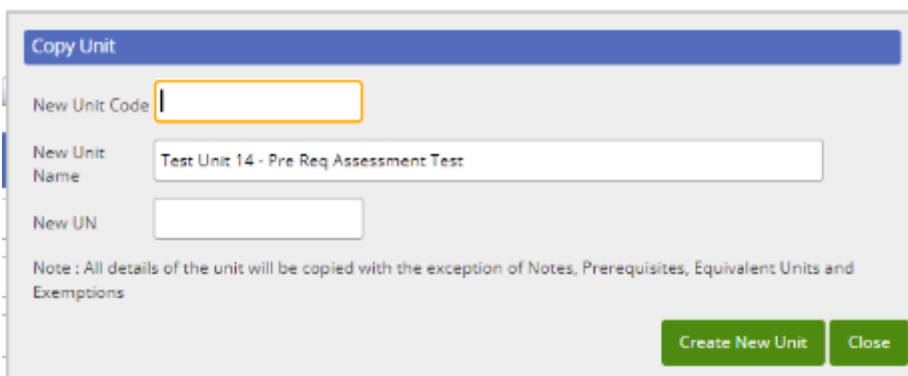
Click the  button as shown below



You can then add in the new unit code, name and UN and click on the



button as below



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 Batch Listing Page

Once you have clicked on the Certification option you will be presented with the following page



Figure 10-1 : Batch listing page

Option/Button	Purpose
	Create a new batch as described in section 10.2
	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
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
	View the selected batch, see section 10.3
	Print the batch, see section 10.4
	View the Certificate Transcript, see section 10.5
	View the Certificate Batch Summary, see section 10.6

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

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	<p>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:.</p> <ul style="list-style-type: none"> 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. ii) An informal ** draft of a full certificate for a qualification for review by centres/candidates before Full Certificate is printed. iii) An informal ** listing of the units that a learner has completed - this document is to be used in association with the Full Certificate
Batch Request	This option is for use with a service layer – please contact GA for more details.

** 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.

10.2.1. 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



Figure 10-3 : Qualification selection page

Button	Purpose
	Select the required qualification and go to the next page
	Enter the full or partial qualification code you wish to use in the search. See section Error! Reference source not found. for examples of possible Wildcard searches
	Return to the certification type selection page

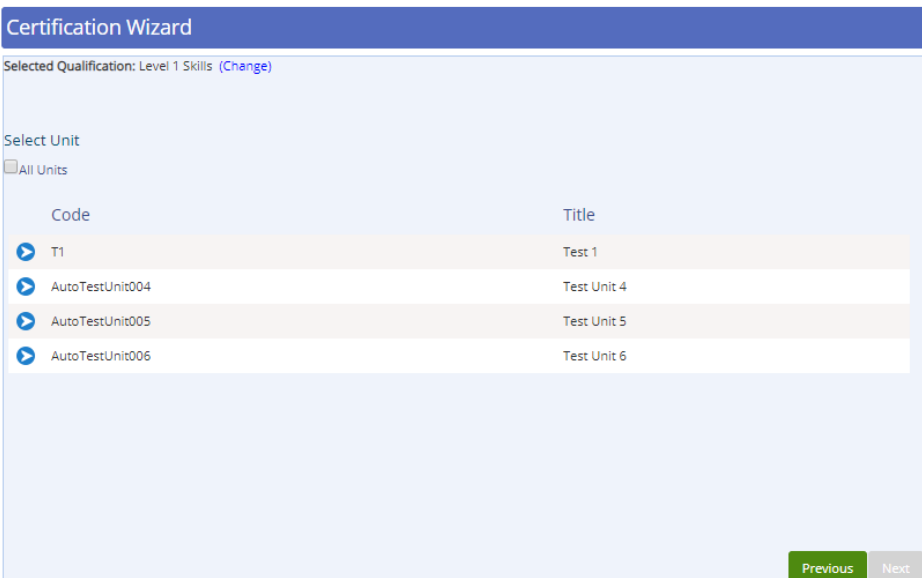
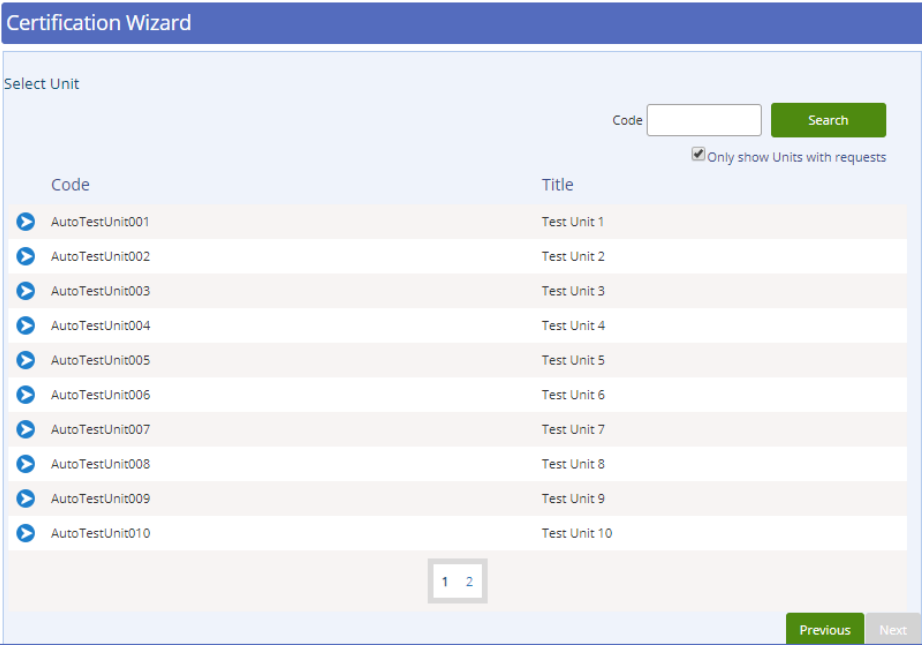



Option	Description
<input type="checkbox"/> Only show qualifications with requests	Allows restriction of search criteria to Learners who have requested a certificate

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

Button	Purpose
	Select the required unit and go to the next page
	Enter the unit code you wish to use in the search. See section Error! Reference source not found. for examples of possible Wildcard searches
	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	

<p>Unit (With 'Filter by Qualification check box checked')</p>		
<p>Unit (With 'Filter by Qualification check box un-checked')</p>		
<p>Button</p>	<p>Batch Type</p>	<p>Purpose</p>
	<p>Unit</p>	<p>Select the unit you wish to produce the batch for and continue to the next page</p>
<p>(Change)</p>	<p>All</p>	<p>Return to the qualification selection page</p>
	<p>All</p>	<p>Return to the certification type selection page</p>
	<p>Qualification or Partial</p>	<p>Confirm use of this qualification for this batch and continue to the next page</p>

Any units marked as 'Exclude from certificate', 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

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

10.2.2. 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.



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

Learner Selection Type	Page
------------------------	------

Centre	<div><h3>Certification Wizard</h3><p>Filter Learners</p><p>Date Filter <input checked="" type="radio"/> All <input type="radio"/> Registrations with grades entered between specified dates</p><p>Requested Only <input type="checkbox"/></p><p>Centre <input type="text" value="All Centres"/> * - Please check the Centre / Site / Qualification Offered status</p><p>Batch Option <input checked="" type="radio"/> One Batch <input type="radio"/> One Batch Per Site</p><p><input type="checkbox"/> Show Learner Selection Screen ?</p><p><input type="button" value="Previous"/> <input type="button" value="Next"/></p></div>
Site	<div><h3>Certification Wizard</h3><p>Filter Learners</p><p>Date Filter <input checked="" type="radio"/> All <input type="radio"/> Registrations with grades entered between specified dates</p><p>Requested Only <input type="checkbox"/></p><p>Centre <input type="text" value="All Centres"/> * - Please check the Centre / Site / Qualification Offered status</p><p>Batch Option <input checked="" type="radio"/> One Batch <input type="radio"/> One Batch Per Site</p><p>Site <input type="text" value="All Sites"/> <input type="checkbox"/> Show Learner Selection Screen ?</p><p><input type="button" value="Previous"/> <input type="button" value="Next"/></p></div>
Reg. Group	<div><h3>Certification Wizard</h3><p>Filter Learners</p><p>Date Filter <input checked="" type="radio"/> All <input type="radio"/> Registrations with grades entered between specified dates</p><p>Requested Only <input type="checkbox"/></p><p>Reg Group Code <input type="text"/></p><p>Event Number <input type="text" value="All"/> <input type="checkbox"/> Show Learner Selection Screen ?</p><p><input type="button" value="Previous"/> <input type="button" value="Next"/></p></div>

Learner Number

Certification Wizard

Filter Learners

Date Filter All
 Registrations with grades entered between specified dates

Requested Only

Learner Number Add

Learners to Include Remove

Show Learner Selection Screen [?](#)

Previous
Next

10.2.1.1 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

10.2.1.2 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

10.2.1.3 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

10.2.1.4 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

10.2.1.5 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

10.2.1.6 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.

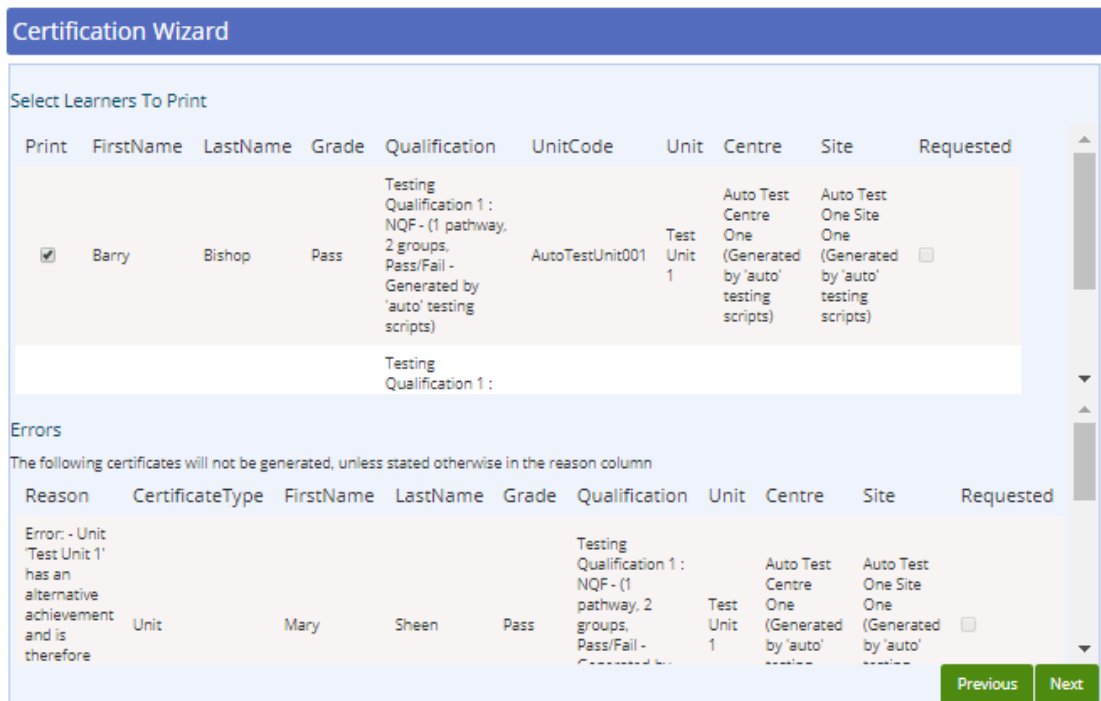


Figure 10-6 : Learner selection page

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
	Return to the Filter Learners page
	Confirm the selection and continue to the next page

If you have not checked the “Show Learner Selection Screen” checkbox then you will be presented with the Batch summary screen below.

10.2.3. Batch Summary

Once all the above steps have been carried out you will be presented with the following page

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






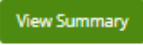

To view a batch click on the  icon on the batch listing page as described in section 10.1 you will then be shown a page similar to the one below



Figure 10-8 : Batch details page

Button	Purpose
	Return to the Batch Listing page
	View the certificates in the batch
	View any errors that this batch encountered while being created
	View the list of units for the certificate. Only available for a full certificate.
	View a summary of the batch

10.4 Printing a Batch

To print a batch click on the  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

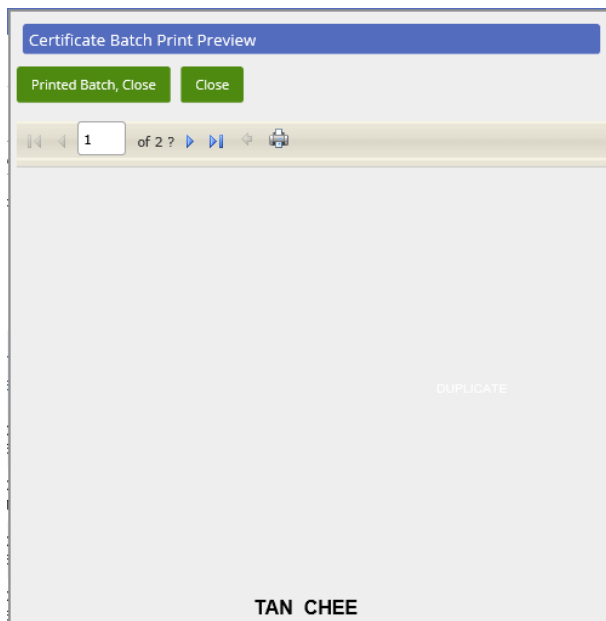









Figure 10-9 : In-page popup to view certificates in a batch

Button	Purpose
	Move to first page (only enabled if more than one page in report)
	Move to previous page (only enabled if more than one page in report)
<input type="text" value="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)
	Print the certificate batch
	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 the in-page popup

Note: marking the batch as printed will require a confirmation that it has indeed been correctly printed

10.5 Print Certificate Transcripts

To print a transcript batch, click on the  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

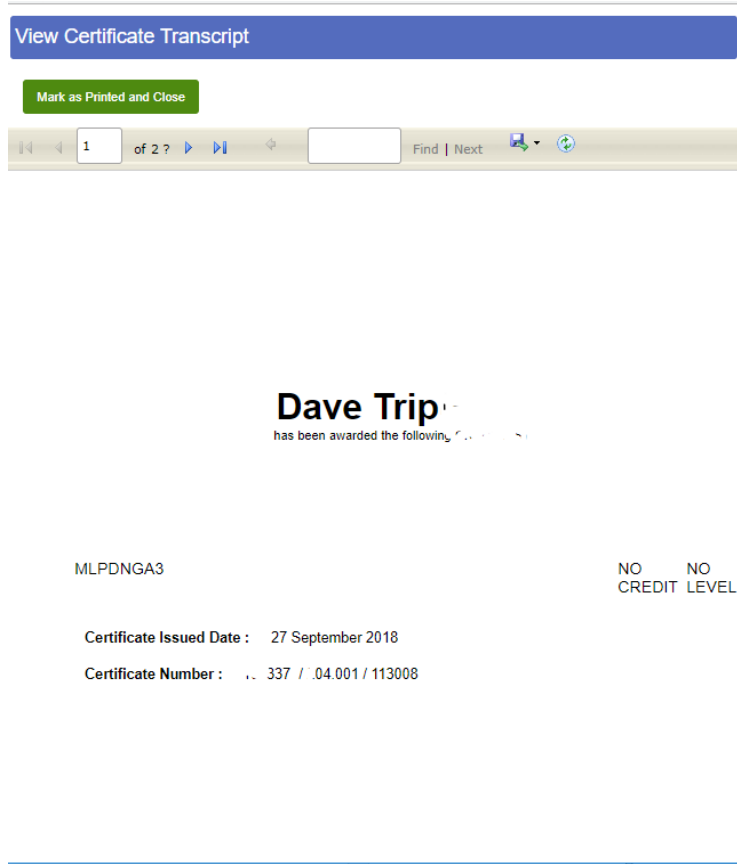





Figure 10-10 : In-page popup to view certificate transcript batch

Button	Purpose
	Move to first page (only enabled if more than one page in report)
	Move to previous page (only enabled if more than one page in report)
<input type="text" value="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)
	Print the certificate transcript batch
	Mark the batch as printed and close the in-page popup; the Transcript Printed checkbox will be selected.
	Close the in-page popup

10.6 Print Certificate Batch Summary

To print a certificate batch summary, click on the  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

View Certificate Batch

1 of 1 Find | Next  

Certificate Batch Summary

Batch Number: 290

Created Date: 26/09/2018

○

Last Modified By: dan

Certificate Number	First Name	Last Name	Learner Code	Certificate Summary	Grade
5215	Bea	Grale	1676		
5215	Bea	Grale	1676		
5215	Bea	Grale	1676		
5215	Bea	Grale	1676		
5215	Bea	Grale	1676		










Figure 10-11 : In-page popup to view certificates in a batch

Button	Purpose
	Move to first page (only enabled if more than one page in report)
	Move to previous page (only enabled if more than one page in report)
<input style="width: 30px; text-align: center;" type="text" value="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)
	Print the certificate batch summary
	Close the in-page popup

10.7 Certificate Export Printing

External certificate companies such as 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.

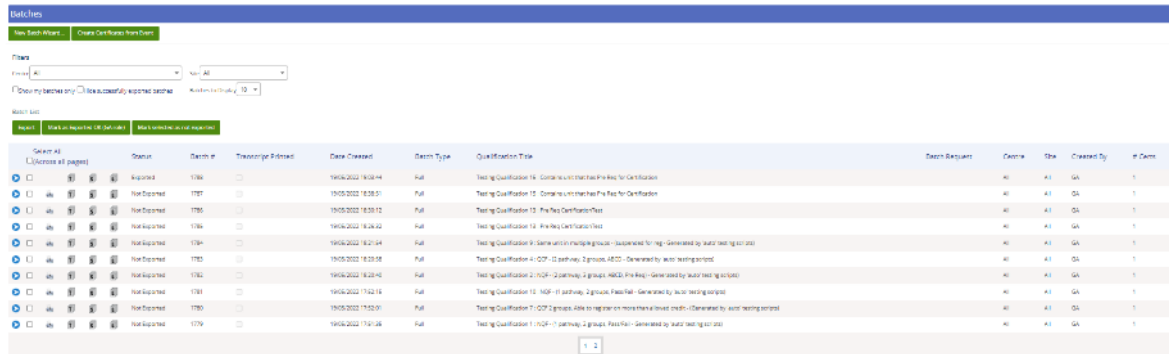
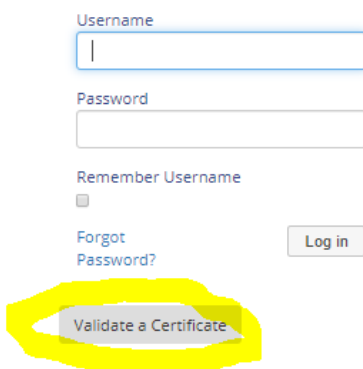


Figure 10-12 : Export for printing

Button	Purpose
	It is possible to export multiple certificate batches to a single Export 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 output file is compatible with Excel. The export directory is configurable to allow the file to be saved to a specific location or to be downloaded via a browser. Please contact GA about these options.
	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.
	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*



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

Please complete all fields *


First Name*

Last Name*

Date of Birth*

Certificate Number*

Certificate Date*

I'm not a robot  reCAPTCHA
Privacy - Terms

Validate

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 if 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

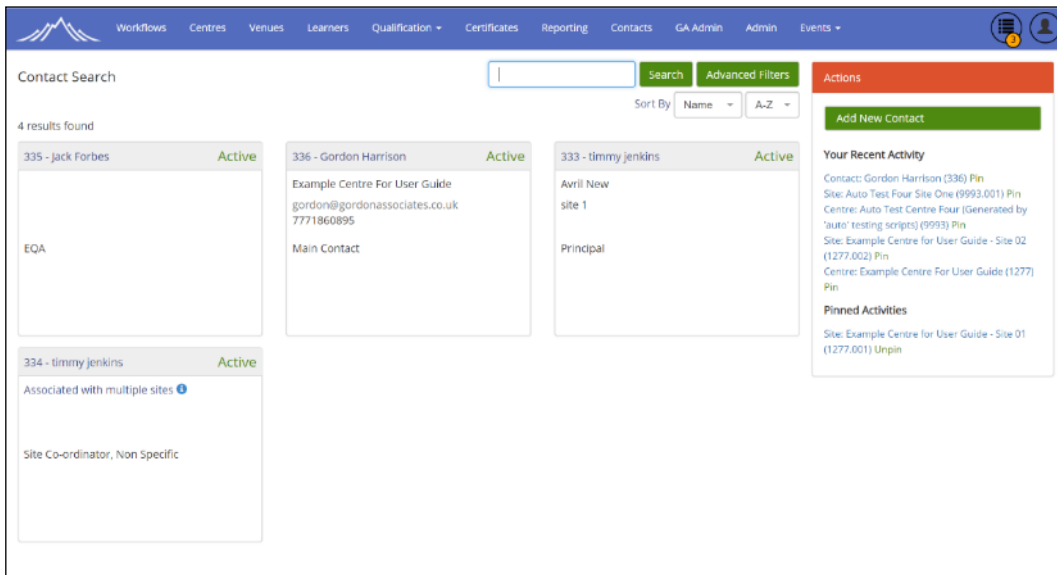
12 Contacts

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.



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.



12.3 Contact Details – View / Add / Edit / Delete Contact

Click on the Contact Card to View / edit the contact details as below.

The screenshot shows the 'Edit Contact' interface for Gordon Harrison. The form contains the following fields and values:

- Contact Code: 336
- Title: Mr
- First Name: Gordon
- Middle Name (s):
- Last Name: Harrison
- Status: Active
- Date of Birth:
- Email: gordon@gordonassociates.co.uk
- Telephone: 7771860895
- Mobile Phone:

Addresses:

Gordon Associates, Suite G1, Montpellier House, Montpellier Drive, Cheltenham, Cheltenham, GLOS, UNITED KINGDOM, GL50 1TY
Address2 for GH, UNITED KINGDOM

Job Roles:

Job Role	Status	Centre
Main Contact	Active	1277 Example Centre For User Guide

Actions:

- Save
- Add New Address
- Add Job Role
- Close
- Delete

Your Recent Activity:

- Site: Example Centre for User Guide - Site 01 (1277.001) Pin
- Contacts: Gordon Harrison (336) Pin
- Site: Auto Test Four Site One (9993.001) Pin
- Centre: Auto Test Centre Four (Generated by 'auto' testing script) (9993) Pin
- Site: Example Centre for User Guide - Site 02 (1277.002) Pin

Pinned Activities:

- Site: Example Centre for User Guide - Site 01 (1277.001) Unpin

Information that can be recorded about a contact is summarised below;

Field Name	Purpose	Validation
Title	Title (salutation) of the contact	Mandatory or Optional. This can be set globally by Gordon Associates for your installation of Parnassus.
First Name	First name of the contact	Mandatory
Middle Name (s)	Middle names of the contact	Optional
Last Name	Last name of the contact	Mandatory
Status	Status of the contact See below.	Mandatory: must be one of the selectable values
Phone	The contacts phone number	Optional, however it is highly recommended that this value be populated.
Email	The contacts email address	Optional, however it is highly recommended that this value be populated. (No Validation)

12.3.1. 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.

12.3.2. 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.

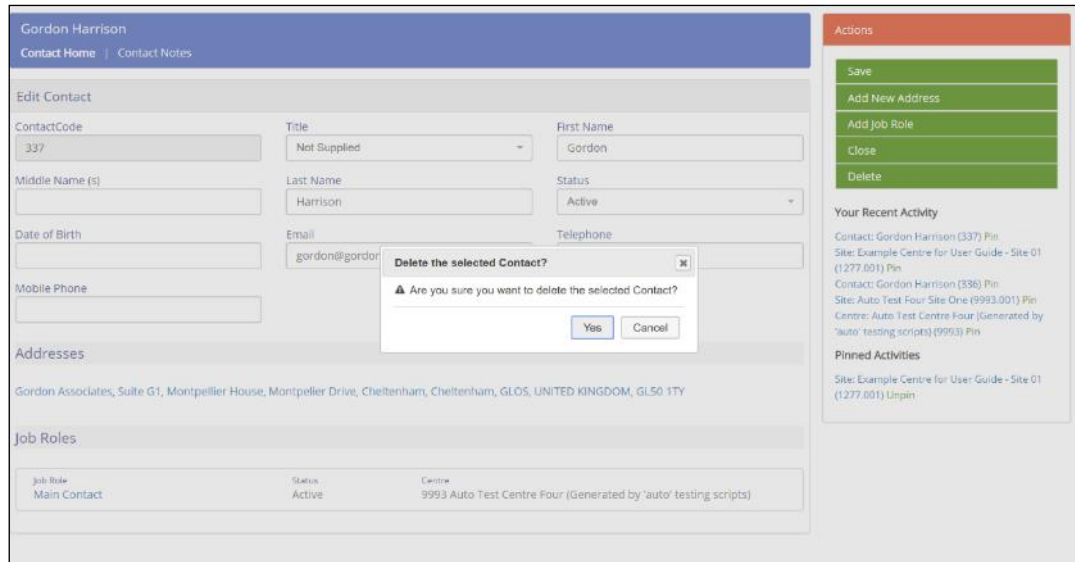
The table below summaries the main Role information;

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	

Site (Only present if Role Type = Site)	A list of sites to which this contact is allocated	Mandatory: must be one of the selectable values
Qualification (Only present if Role Type = Qualification)	A list of qualifications which are allocated to the centre via the 'Qualifications' tab on the site page.	Mandatory: must be one of the selectable values

12.3.3. 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.



13 Facilitators

When you have clicked on the Events → 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.

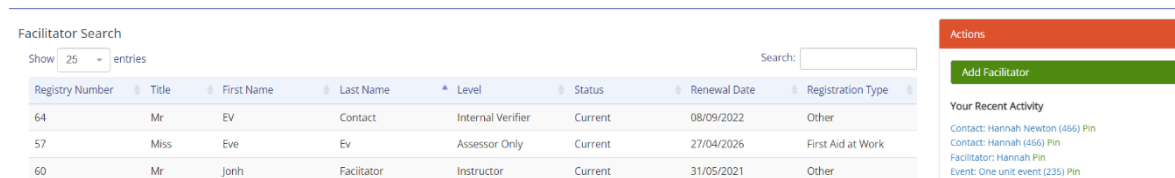


Figure 13-1 : Facilitators

Button	Purpose
--------	---------

Add Facilitator	Selects facilitator creation popup
Search: <input data-bbox="414 219 632 259" type="text"/>	Search for a facilitator

13.2 Add New Facilitator Details




Clicking on the 'Add Facilitator' button will take you to the popup screen as shown below.

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 12.3.10	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 12.3.4	Mandatory: must be one of the selectable values

Buttons available on this page

Button	Purpose
	Opens the list of available facilitator status types and allows it to be changed.
	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.

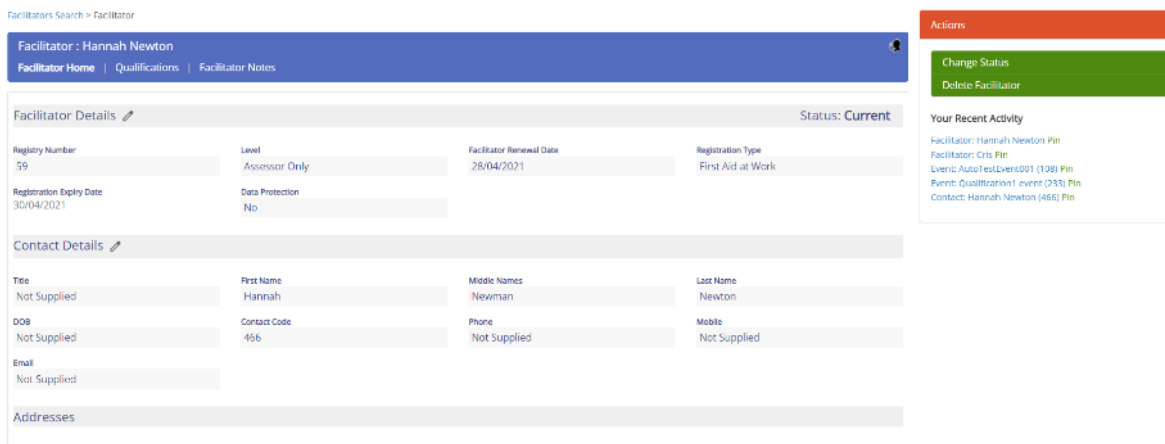



Figure 13-3 : Facilitator Home

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 12.3.4	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 12.3.10	Mandatory, must be a valid date value.

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

12.3.4. Facilitator Status

The following statuses will be available for a Facilitator:

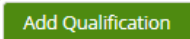
Status	Can add Facilitator to Event
In Processing	No
Current	Yes
Non Current	No
Suspended	No
Retired	No
In-Training	No
Deceased	No

12.3.5. Facilitator Qualifications Tab

This tab shows a list of the Facilitator qualifications.



Buttons available on this page

Button	Purpose
	Add a qualification for the Facilitator

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

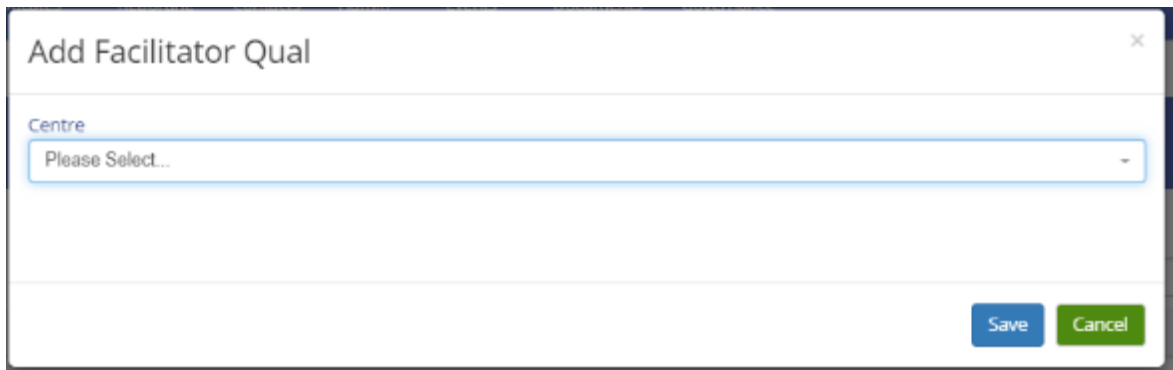
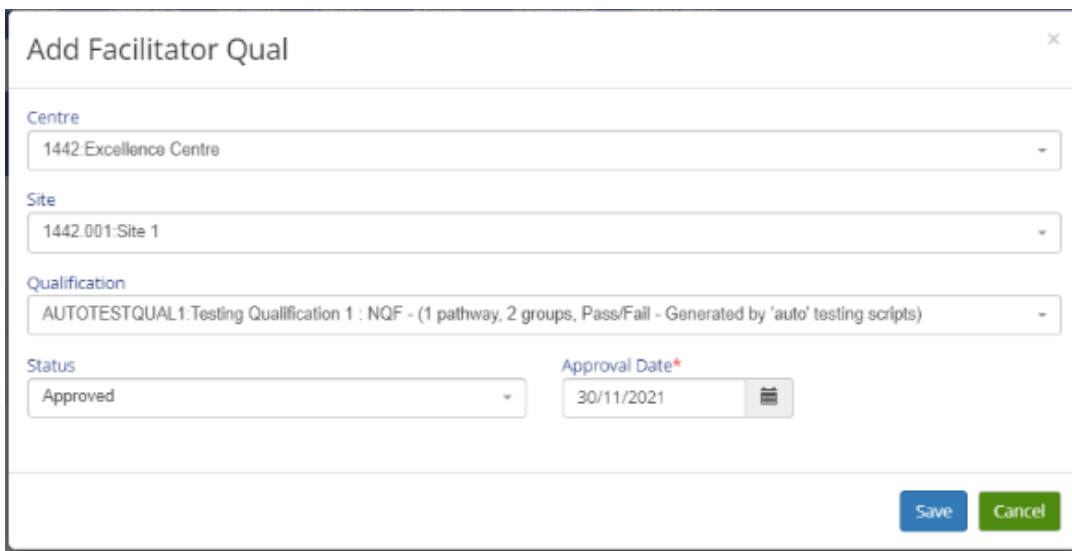


Figure 13-4 : Add Facilitator Qualification popup

Next all of the fields required to assign the qualification to the Facilitator are shown:





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
--------	---------

	Save and add the record with the data entered and return to the Facilitator Qualifications Tab
	Cancel the record and return to the Facilitator Qualifications Tab.

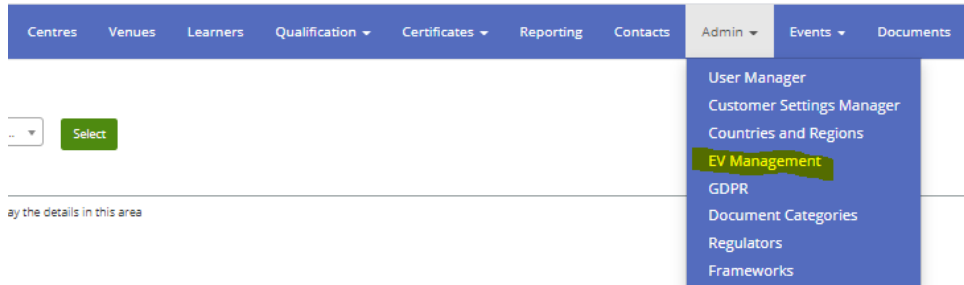
12.3.6. Facilitator Notes Tab

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.



14.1 EV User Set up

14.1.1.1.1 Create a new contact

EV Contact
Contact Home | Contact Notes

Edit Contact

ContactCode 1005	Title Mr	First Name EV
Middle Name (s)	Last Name Contact	Status Active
Date of Birth	Email	Telephone
Mobile Phone		

This contact currently has no Job Roles.

Actions

- Save
- Add New Address
- Add Job Role
- Close
- Delete

Your Recent Activity

Contact: EV Contact (1005) Pin
Centre: Test1 (102) Pin
Site: GA Test Site (101.001) Pin
Centre: GA Test Centre (5062) Pin

14.1.1.1.2 Save and add new role of EV after first selecting Associate role with Awarding Organisation), then save the contact

EV Contact
Contact Home | Contact Notes

Create Contact Job Role

Contact
EV Contact (1005)

Associate role with
Awarding Organisation

Job Role
EV

Status
Active

Approved From

Approved To

Actions

- Save
- Cancel

Your Recent Activity

Contact: EV Contact (1005) Pin
Centre: Test1 (102) Pin
Site: GA Test Site (101.001) Pin
Centre: GA Test Centre (5062) Pin

Note: The Approved From and To dates are for information only. No validation is carried on the dates. EV functionality uses the Contact status and Job Role status.

14.1.1.1.3 Add New Parnassus User with the EV Role

User Manager

User Name:	<input type="text" value="EV User"/>	Created:	<input type="text" value="24/05/2021"/>
Locked Out:	<input type="text" value="No"/>	Last Activity:	<input type="text" value="24/05/2021"/>
Enabled:	<input type="text" value="Yes"/>	Last Login:	<input type="text" value="24/05/2021"/>
Online:	<input type="text" value="True"/>		
Comment:	<input type="text"/>		
Roles:	<input type="checkbox"/> Admin <input type="checkbox"/> BypassCourseValidation <input type="checkbox"/> Centres <input type="checkbox"/> CentreServiceLayer <input type="checkbox"/> CentreUserManager <input checked="" type="checkbox"/> EV <input type="checkbox"/> Examiner <input type="checkbox"/> ExamsPowerUser <input type="checkbox"/> ExamsUser <input type="checkbox"/> Finance <input type="checkbox"/> ISTDUser <input type="checkbox"/> QAPowerUser <input type="checkbox"/> QAUser <input type="checkbox"/> Supervisor <input type="checkbox"/> Teacher <input type="checkbox"/> Users	Associated Contact:	<input type="text" value="None"/>
Associated Sites:	<input type="text"/>	Associated Centre:	<input type="text" value="None"/>

14.1.1.1.4 Assign the contact to the EV User

Users Roles Bulk Upload

User Name	<input type="text" value="EV User"/>	Associated Centre	<input type="text" value="None"/>
Email	<input type="text" value="test@gordonassociates.co.uk"/>	Associated Contact	<input type="text" value="467 - EV Contact"/>
Reset Password To	<input type="text"/>	Associated Sites	<input type="text"/>

Please select a centre in order to select associated sites.

- Admin

- 14.1.1.1.5
- 14.1.1.1.6
- 14.1.1.1.7

15 Assign sites and qualifications to the EV

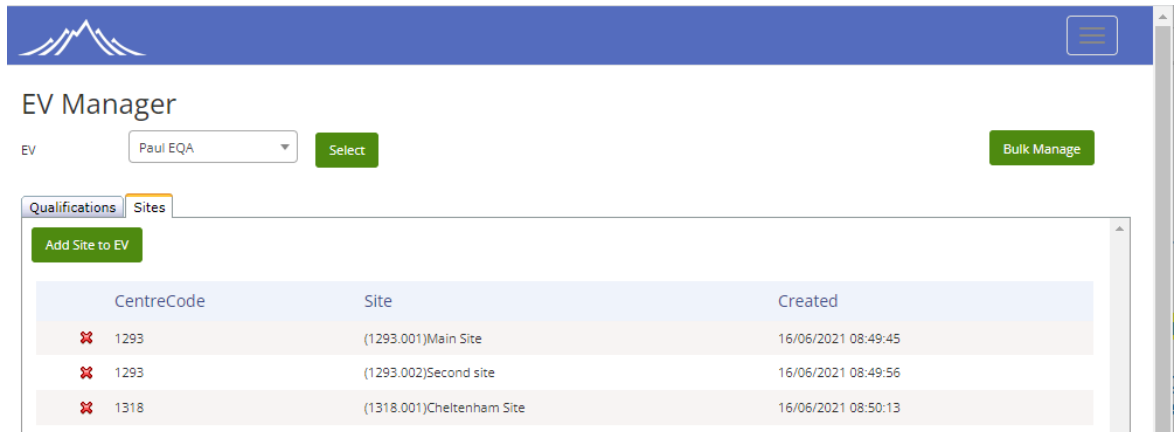
15.1 EV Manager

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 all qualifications they are approved for at all 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:

12.3.7. Viewing, adding and editing EV Links to qualifications and sites



To add an association with a site qualification for an EV user, first select the EV user on the drop down menu

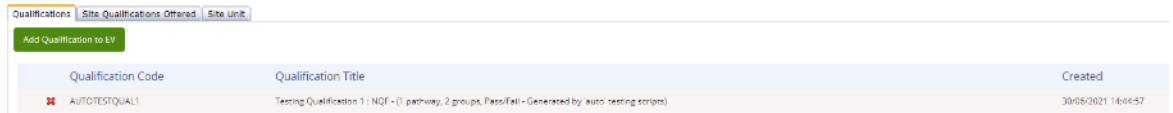
Then using the Qualifications tab you can click on the **Add Qualification to EV** button.

You will see a pop up box where you can select the qualification to be associated with the EV.


The screenshot shows a pop-up dialog box titled 'Add EV to Qualification'. It has a blue header. Below the header, there is a text input field for 'EV' containing 'Eve Ev'. Below that is a dropdown menu for 'Qualification' with the text 'Select Qualification'. At the bottom right, there are two green buttons: 'Cancel' and 'Add'.

You can either **Add** or **Cancel** the addition of the EV to the qualification using the available buttons.

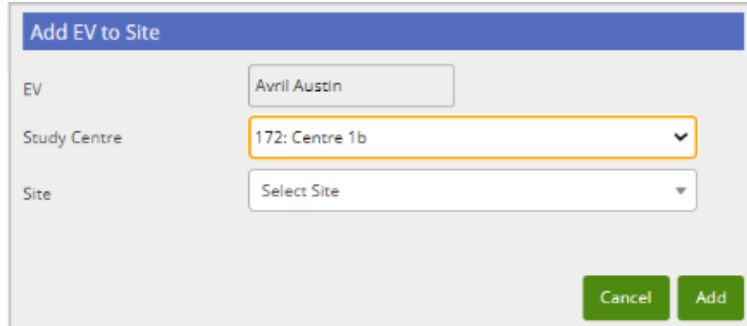
The information on the qualification(s) that the selected EV is associated with is displayed in the Qualifications tab.



The screenshot shows a table with the following columns: Qualification Code, Qualification Title, and Created. A green button 'Add Qualification to EV' is visible above the table. The table contains one row with a red 'X' icon in the first column.

Qualification Code	Qualification Title	Created
 AUTOTESTQUAL1	Testing Qualification 1 - NQF - (1 pathway, 2 groups, Pass/Fail - Generated by auto testing scripts)	30/05/2021 14:44:57

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



The form has a blue header 'Add EV to Site'. It contains three input fields: 'EV' with the text 'Avril Austin', 'Study Centre' with a dropdown menu showing '172: Centre 1b', and 'Site' with a dropdown menu showing 'Select Site'. At the bottom right are two green buttons: 'Cancel' and 'Add'.

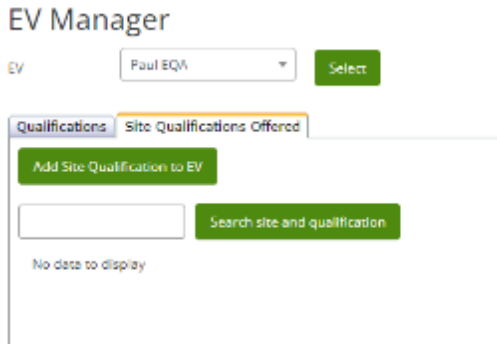
You can delete a qualification or site associated with an EV User by using the  button.

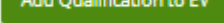
2. EV Qualification and Qualification Offered

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 for the qualification offered 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.

12.3.8. 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:



Then using the Qualifications tab you can click on the  button.

In the pop up box select the qualification the EV is approved for.





You can either  or  the addition of the EV to the qualification using the available buttons.

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.

The dialog box titled "Add EV to Site Qualification" contains the following fields and controls:

- EV: Text input field containing "Eve Ev".
- Centre: Dropdown menu with "Select Centre".
- Site: Dropdown menu with "Please select a Centre".
- Qualification: Dropdown menu.
- Default EV for qualification at site: A checkbox that is currently unchecked.
- Buttons: "Cancel" and "Add" buttons at the bottom right.

You can either  or  the addition of the EV to the Site Qualification using the available buttons.

The list of site Qualifications Offered is updated:

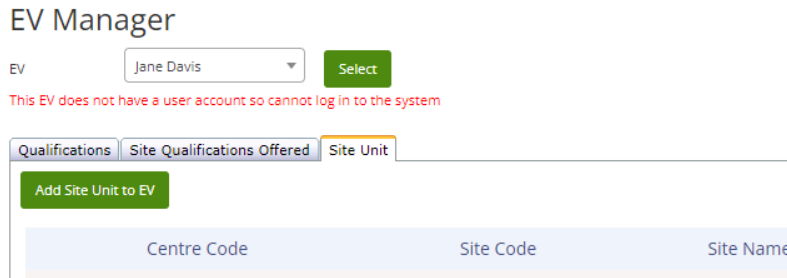
The EV Manager interface includes a search bar with "Eve Ev" and a "Search" button. Below are tabs for "Qualifications", "Site Qualifications offered", and "Site Unit". A search bar "Search site and qualification" is present above a table.

Centre Code	Site Code	Site Name	Qualification Code	Qualification Title	Default For Site	Created
1442	1442.001	Site 1	AU10115-QUAL1	Testing Qualification 1 - INQ1 - (1) pathway, 2 groups, Press all - Generated by auto testing scripts	<input type="checkbox"/>	1/11/2021 14:29:08

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.

12.3.9. Viewing, adding and editing EV Links to site units

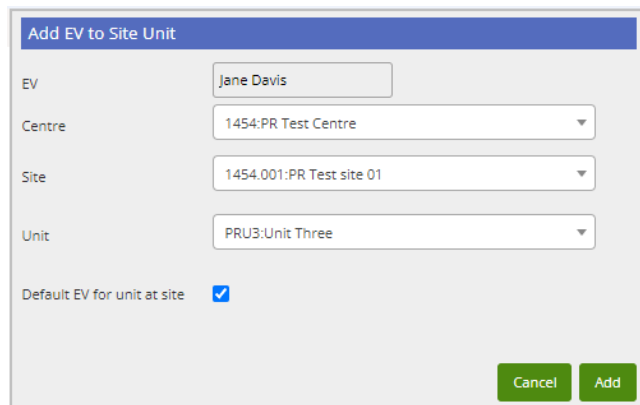




First select the EV.

From the Site Unit tab you click on the  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.



You can either  or  the addition of the EV to the site unit using the available buttons.

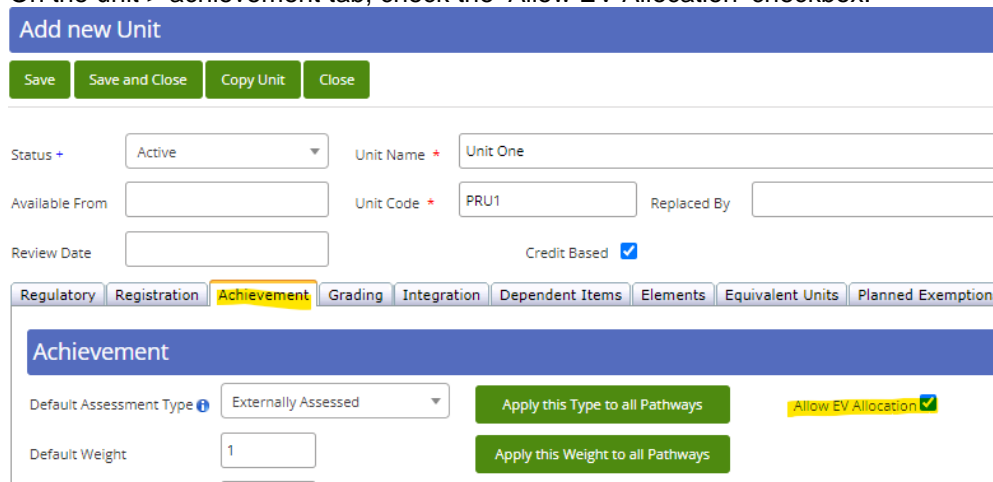
The information on the site unit(s) that the selected EV is associated with is displayed in the Site Unit tab.



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 .

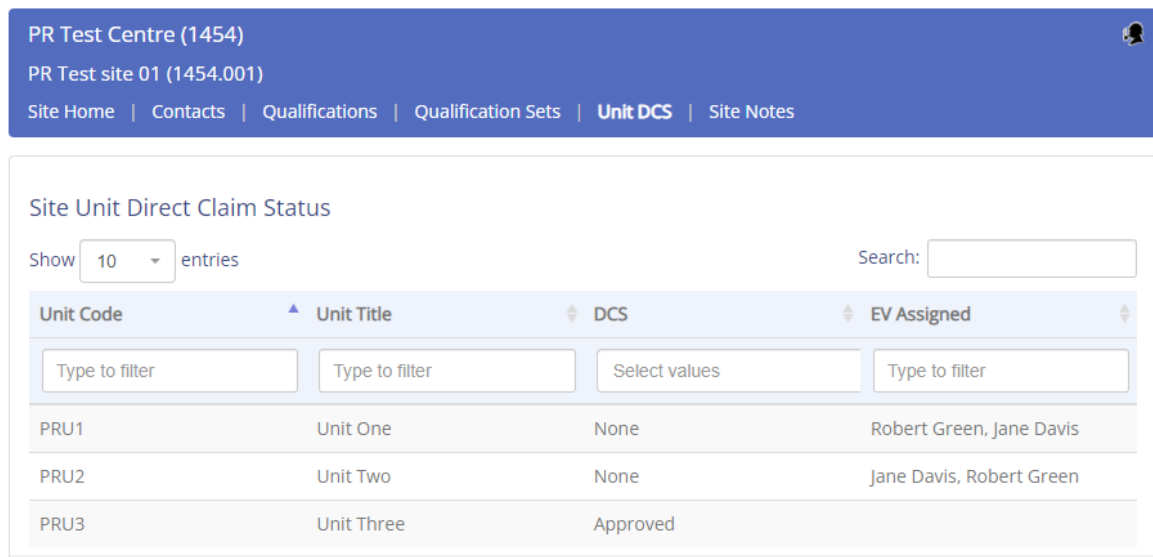
Additional configuration required with Unit and Site :

On the unit > achievement tab, check the 'Allow EV Allocation' checkbox:



The screenshot shows the 'Add new Unit' form with the 'Achievement' tab selected. The 'Allow EV Allocation' checkbox is checked. Other visible fields include 'Status' (Active), 'Unit Name' (Unit One), 'Unit Code' (PRU1), and 'Credit Based' (checked).

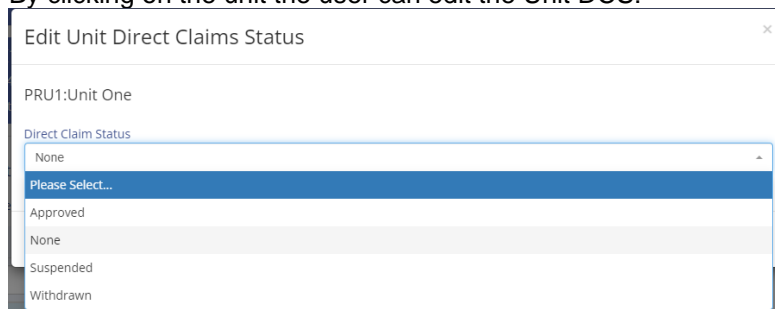
A 'Unit DCS' tab is available on the Site screen. This shows the units on all the qualifications Offered at the site where the 'Allow EV Allocation' has been ticked. It shows the EV's that are approved for the units with the default EV showing first.



The screenshot shows the 'Unit DCS' tab with a table of units and their Direct Claim Status. The table has columns for Unit Code, Unit Title, DCS, and EV Assigned.

Unit Code	Unit Title	DCS	EV Assigned
PRU1	Unit One	None	Robert Green, Jane Davis
PRU2	Unit Two	None	Jane Davis, Robert Green
PRU3	Unit Three	Approved	

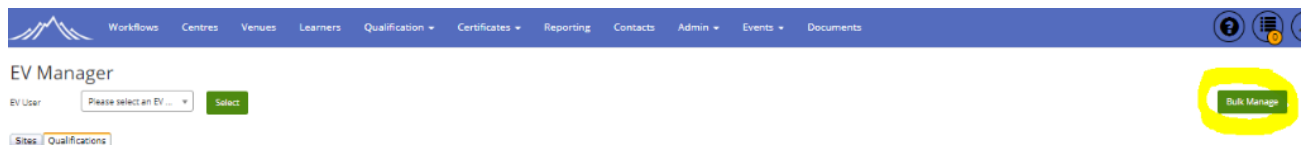
By clicking on the unit the user can edit the Unit DCS:



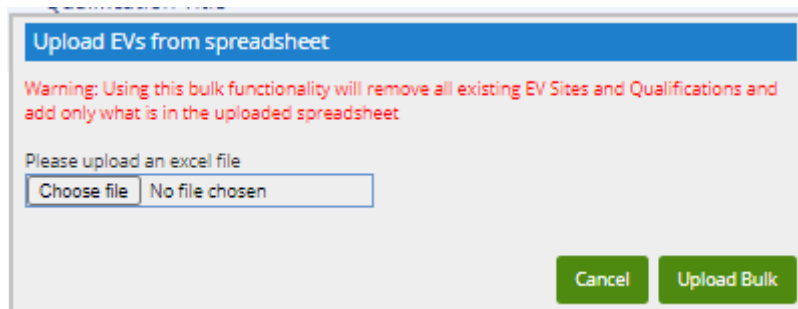
The screenshot shows the 'Edit Unit Direct Claims Status' dialog box. The 'Direct Claim Status' dropdown menu is open, showing options: None, Please Select..., Approved, None, Suspended, and Withdrawn.

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.**



You will need to click on the **Bulk Manage** button to do this. Then a pop up screen will appear so you can choose the file you are using for the import.



You can either click the **Upload Bulk** 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.

Event Search

Show entries

Show Live Events Only More Filters

Search:

Event Number	Event Title	Status	Site	Qualification Code	Qualification Title
233	Qualification1 event	Approved	1442.001: Site 1	AUTOTESTQUAL1	Testing Qualification 1 : NQF
108	AutoTestEvent001	Approved	9990.001: Auto Test One Site One (Generate...	AUTOTESTQUAL1	Testing Qualification 1 : NQF

Showing 1 to 2 of 2 entries

Previous 1 Next

Actions

Add Event

Your Recent Activity

- Facilitator: EV Contact Pin
- Event: Two Day Course Qualification 5 (234) Pin
- Event: Qualification1 event (233) Pin
- Centre: TFS 2155 (1445) Pin
- Site: TFS2155 Site (1445.001) Pin

The event list can be scrolled across to see the number of facilitator and registrations for each event.

Event Search

Show entries

Show Live Events Only More Filters

Search:

Qualification Code	Qualification Title	Facilitators	Created	Centre Name	Start Date	End Date	Number of regs
TFS2066_01	TFS2066_Qual01	1	24/05/2022	TFS2066_Centre02	25/05/2022	25/05/2023	1
ate... AUTOTESTQUAL1	Testing Qualification 1 : NQF - (1 p...	0	22/05/2012	Auto Test Centre One (Generated ...	01/05/2012	01/05/2019	1

Showing 1 to 2 of 2 entries

Previous 1 Next

Figure 16-1 : Events

Button	Purpose
	Selects Event creation popup

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

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.

The screenshot shows a dialog box titled 'Add Event'. It contains three dropdown menus: 'Centre' (with 'Please Select...' as the current selection), 'Site', and 'Qualification'. A green 'Cancel' button is located at the bottom right.

The screenshot shows the 'Add Event' dialog box with the following fields and values:

- Centre:** Excellence Centre
- Site:** 1442.001:Site 1
- Qualification:** AUTOTESTQUAL9:Testing Qualification 9 : Same unit in multiple groups - (suspended for reg - Generated by 'auto' testing scripts)
- Event Title:** (Empty text box)
- Organiser:** None
- Start Date*:** (Empty date picker)
- End Date*:** (Empty date picker)
- Max Registrations:** (Empty text box)
- No of Resources:** (Empty text box)
- Estimated Attendees:** (Empty text box)
- Purchase Order:** (Empty text box)
- Partner Event:** (Empty text box)
- Auto Register Units:**
- Status:** Approved

At the bottom right, there are 'Save' and 'Cancel' buttons.

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.

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.

The screenshot displays the 'Qualification1 event' page in the Parnassus system. At the top, there is a navigation bar with tabs for 'Event Home', 'Facilitators', 'Units', 'Learners', 'EVs', 'Custom', and 'Notes'. Below this, the 'Event Details' section shows the event title 'Qualification1 event' and its status as 'Approved'. A grid of fields provides details such as Event Number (233), Start Date (24/11/2021), End Date (25/11/2021), and various optional fields like 'No of Resources' and 'Auto Register Units'. A 'Site And Qualification' section at the bottom identifies the Centre as '1442:Excellence Centre' and the Site as '1442.001:Site 1'. On the right side, an 'Actions' panel offers options like 'Update Status', 'Create Certificates', and 'Registration Upload'. Below the actions, a 'Your Recent Activity' section lists recent events and their details.

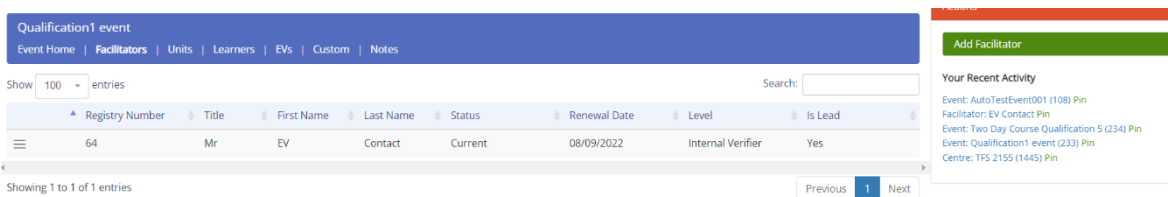
Actions on this page

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.

Create Certificates	Issue certificates for the event participants – this takes you to the Certificate Wizard where the event, centre and site details are pre-populated 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.

12.3.10. 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.



Clicking on the 'Add Facilitator' button will show a dropdown box containing the Facilitator's that can be assigned to the Event.

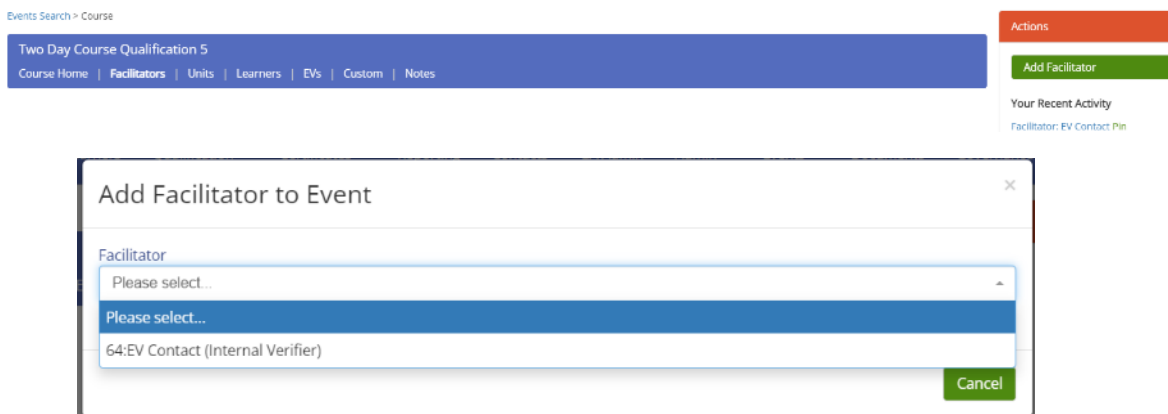


Figure 16-3 : Add Facilitators Tab

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	Purpose
--------	---------

	Clicking on this gives the option to delete or mark the facilitator as lead for this event
Add Facilitator	Add facilitators to the event

12.3.11. Units Tab

This Tab allows the user to select the Qualification units which will be covered at this event.

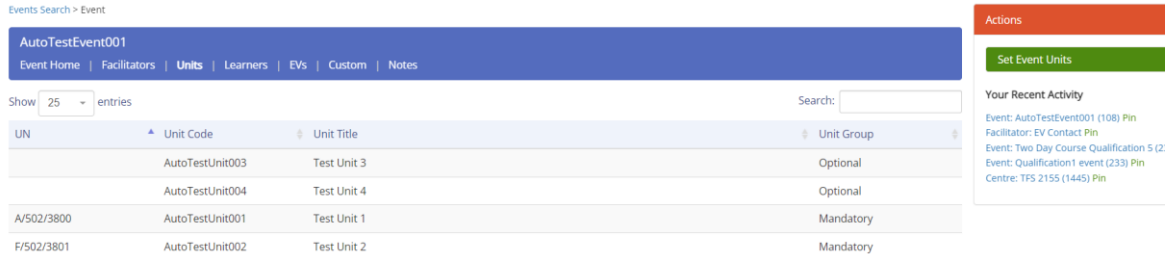


Figure 16-4 : Units Tab

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.



Buttons available on this tab

Button	Purpose
	Save the assigned event units
	Cancel changes to the event units used
	Opens the popup box to edit event units assigned

12.3.12. Learners Tab

Shows the learners who have been registered for the Event.

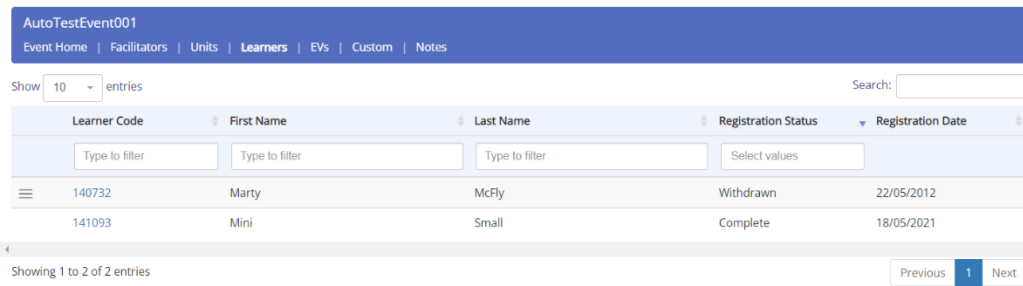


Figure 16-5 : Learners Tab

Available on this tab

Button/Link	Purpose
	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 link

12.3.13. EV's Tab

Shows the EV's who are approved for the qualification at the Centre offered by the Event.

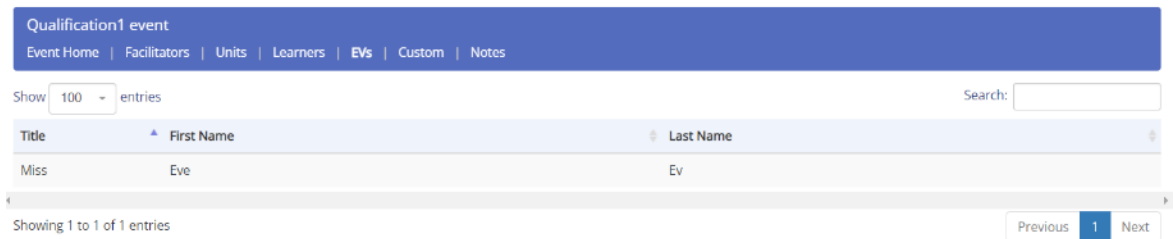


Figure 16-6 : EV's Tab

Available on this tab

Button/Link	Purpose
Search: <input type="text"/>	Text box to search for an EV

12.3.14. Custom Tab

Tab for displaying custom data fields for the Event – please contact us if you wish to use these.



Figure 16-7 : Custom Tab

Available on this tab

Button/Link	Purpose
Search: <input data-bbox="416 192 651 235" type="text"/>	Text box to search for an EV

12.3.15. Notes Tab

See Section 18.

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.

Note: You can exclude results being sent per qualification by selecting the Exclude from PLR on the relevant qualification.

The screenshot shows a configuration form with several options. The 'Exclude from PLR' checkbox is highlighted in yellow and is checked. Other visible options include 'Use Best' selected by default (checked), 'Max. Number Of Exemptions' set to 3, 'Signature Mandatory for Registration' (unchecked), and '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 from the PLR.	Describes how you should withdraw achievement from a learner in Parnassus and how the PLR is then updated
16.6	Re-submitting previously withdrawn unit / qualification achievement.	Describes how you should re-submit 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.

12.3.16. ULN Verification

The screenshot shows the 'Learner' form in Parnassus. The 'ULN' field is highlighted with a red circle and contains the value '134567889'. Other fields include 'Learner First Name' (May), 'Middle Names', 'Last Name' (Lessing), 'Title' (Not Supplied), 'Number' (124348), 'DOB' (30/03/1988), 'Ethnic Origin' (Not Supplied), 'Gender' (Female), and 'Nationality' (UNITED KINGDOM). Below the form is a table of registrations.

Qual/Unit Code	Title	Registration Date	Centre - Site	Status	Standalone Registration	Qualification Set	Created By
L15	Level 1 Skills (L15)	24/09/2018	Avril New - site 1 (1275.001)	Complete	No	QS2	gs
L15	Level 1 Skills (L15)	24/09/2018	Avril New - site 1 (1275.001)	In Progress	No	QS2	gs

9.2.3.1 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.

9.2.3.2 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.

12.3.17. 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.

Events that trigger actions against the PLR

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

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.

12.3.18. Viewing Achievement Data submitted to the PLR

Unit

Unit Registration Details

Unit	Graded Unit			
Unit Code	gradedUnit			
Registration Date	<input type="text" value="28/04/2015"/>	Last LRS Action	Withdraw	
		Last LRS Action Date	28/04/2015	
Include On Award	<input checked="" type="checkbox"/>			
<div style="display: flex; border-bottom: 1px solid #ccc;"> Grading Prerequisites </div>				
Add Grade				

Qualification

Edit Qualification Registration - V

Save
Save and Close
Close
Transfer

Qualification
Units
PLR
Alternative Achi

Last LRS Action	Create
Last LRS Action Date	19/07/2018

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.


12.3.19. 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.

The screenshot shows the 'Learner' form in Parnassus. The form includes fields for Learner First Name (Eva), Middle Names, Last Name (Faulkner), Title (Miss), Number (1100000986), ULN (1277751950, circled in red), DOB (21/11/1989), Ethnic Origin (Not Supplied), Gender (Female), and SCN. Below the form is a table with columns: Qual/Unit Code, Title, Registration Date, Centre - Site, Status, Standalone Registration, Qualification Set, and Created By. The table is currently empty.

9.2.3.3 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.

9.2.3.4 Manual

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  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.

9.2.3.5 ULN field

If achievement has been successfully uploaded to the PLR Parnassus prevents the ULN being updated.

9.2.3.6 General

The background process updates the ULNVerificationStatus of each learner – and if a user looks at that Learner record in Parnassus the  icon will have become  or 

9.2.3.7 Reports

There is a report of ULNs that have failed verification that can be run from the Reports screen in Parnassus.

12.3.20. Achievement Upload

See the Achievement Upload section in the Overview section for general information on uploading achievement.

9.2.3.8 Automatic

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.

9.2.3.9 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 -

Grade	Assessment Date	Assessment Venue	Void	Last Modified Date	User	Alternative Achievement	Last LRS Upload	Release Date	Expiry Date
Pass	30/12/2014		<input type="checkbox"/>	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.

OK

12.3.21. 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.

12.3.22. 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 http://www.loc.gov/standards/iso639-2/php/code_list.php 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.

12.3.23. 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.

12.3.24. ULN Verification

Section *1.2.1 ULN Verification* describes standard Parnassus ULN verification functionality.

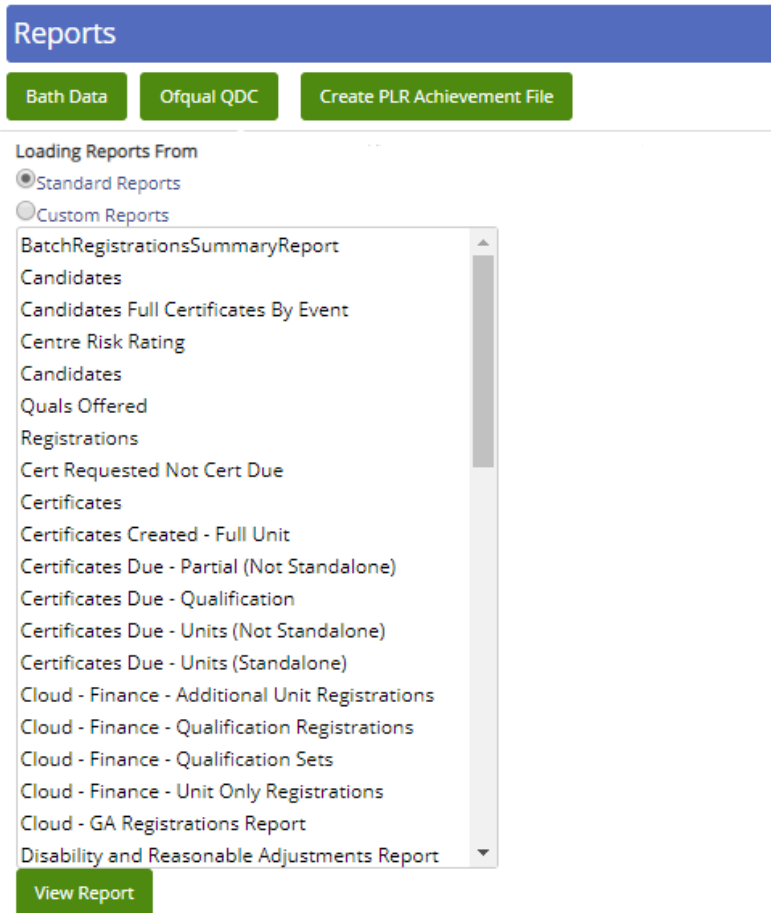
It is not necessary to verify ULN's in Parnassus prior to uploading achievement to the PLR as ULN's are verified during achievement upload. Achievement with "failing" ULN's is not accepted by the PLR. The correct learner ULN should be got from the PLR and Parnassus updated with the correct ULN, so future 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.

12.3.25. Achievement Upload File

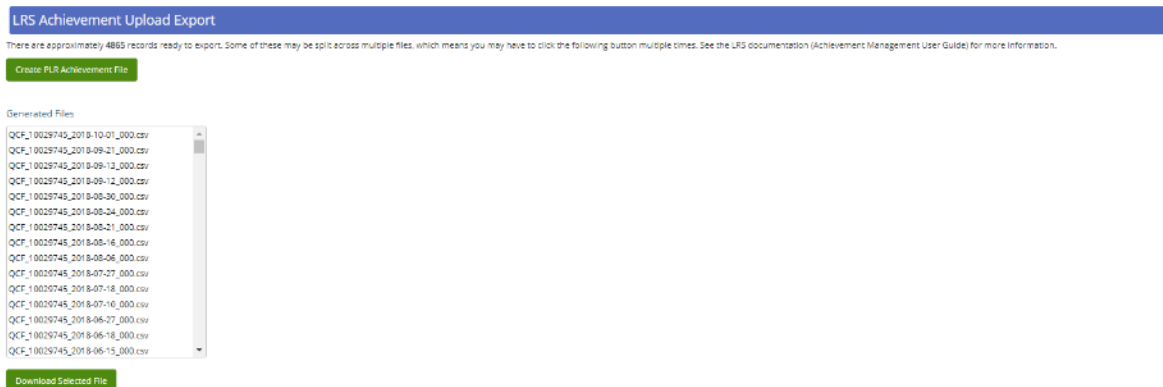
The purpose of the Achievement File is to create a set of achievement data from Parnassus for upload to the PLR. This saves having to create the file manually.

An Achievement Upload file can be created from the Reports section of Parnassus, as screenshot below.



Notes

1. 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.

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.

12.3.26. Withdraw Learner Unit Achievement

#	Step	Comment
1	Withdraw unit achievement in Parnassus.	
2	Update the PLR for the withdrawn unit achievement.	<p>If you use the web service link – Wait for the next scheduled achievement upload or manually submit the achievement</p> <p>If you use the File upload, the updated Unit achievement will be included in the next exported file.</p>
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.

9.2.3.10 Withdraw Unit Achievement in Parnassus

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 Registration Details			
Unit	Graded Unit		
Unit Code	gradedUnit		
Registration Date	<input type="text" value="28/04/2015"/>	Last LRS Action	Withdraw
Include On Award	<input checked="" type="checkbox"/>	Last LRS Action Date	28/04/2015
<input type="button" value="Grading"/> <input type="button" value="Prerequisites"/>			

12.3.27. 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: <https://www.uklrs.miap.gov.uk/wps/myportal/>, Sandpit: <https://sandpit.staging.miap.gov.uk/secure/>) (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

Unit Registration Details

Unit Graded Unit

Unit Code gradedUnit

Registration Date

Include On Award

Last LRS Action Withdraw

Last LRS Action Date 28/04/2015

Grading Prerequisites

Add Grade

Assessment Date

Grade

Result Release Date

Add

Attempts

Grade	Assessment Date	Assessment Venue	Void	Last Modified Date	User	Alternative Achievement	Last LRS Upload	Release Date	Expiry Date
✘ B	08/10/2018		<input type="checkbox"/>	02/10/2018	adminav	No			

Save & Close
Close

12.3.28. 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.

Close Window			
The following errors were encountered during submission of data to the PLR.			
Batch Identifier	QCF_SAND0134_2013-02-21_015		
Error Message	Too many records have failed validation. No records have been loaded.		
Total Records	1		
Failed Records	1		
Status	Rejected		
PLR Response Messages			
ULN	Unit or Qualification Reference Number	Date Awarded (CCYY-MM-DD)	Error Reason
9732088639	J/601/2101	2013-02-21	Create Achievement failed due to the following error(s) 'Unable to create achievement as it already exists.'
Prometheus Messages			

12.3.29. 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.

Close Window			
The following errors were encountered during submission of data to the PLR.			
Batch Identifier	QCF_SAND0134_2013-02-21_017		
Error Message	Too many records have failed validation. No records have been loaded.		
Total Records	2		
Failed Records	2		
Status	Rejected		
PLR Response Messages			
ULN	Unit or Qualification Reference Number	Date Awarded (CCYY-MM-DD)	Error Reason
9732088639	500/9066/5	2013-02-21	Update Achievement failed due to the following error(s) 'Unable to update achievement as it has been previously withdrawn.'

To prevent this error the qualification achievement will need to be manually created against the learner via the LRS portal as described below.

9.2.3.11 Adding a qualification achievement via the LRS Portal

You will need to go to the LRS Portal (Live: <https://www.uklrs.miap.gov.uk/wps/myportal/>, Sandpit: <https://sandpit.staging.miap.gov.uk/secure/>) (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.
3. 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

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

Note	File Name	Added	User	Priority
learner may need 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 icon and clicking the save button once you have changed the text as required; or deleted by clicking on the 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 will show in the grid as below

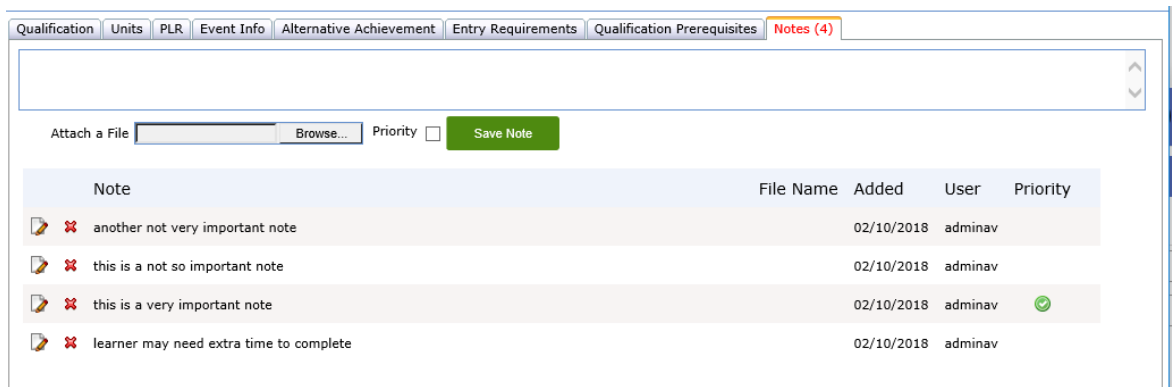


Figure 18-3 : Notes tab populated with a priority note

Note: the maximum size for the text in a single note is 500 characters including spaces, carriage returns etc.

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.

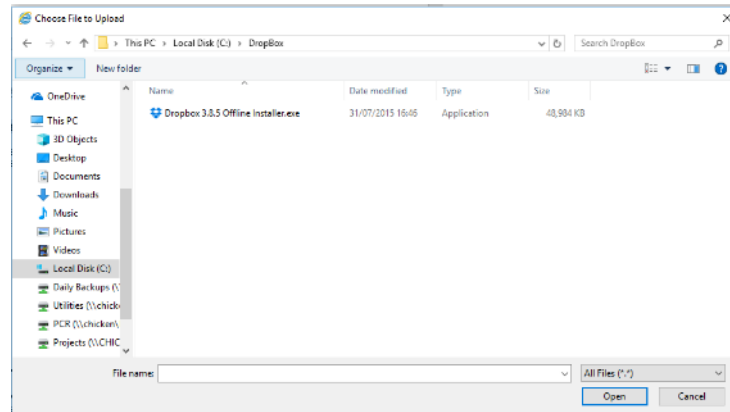


Figure 18-3 : File selection window

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

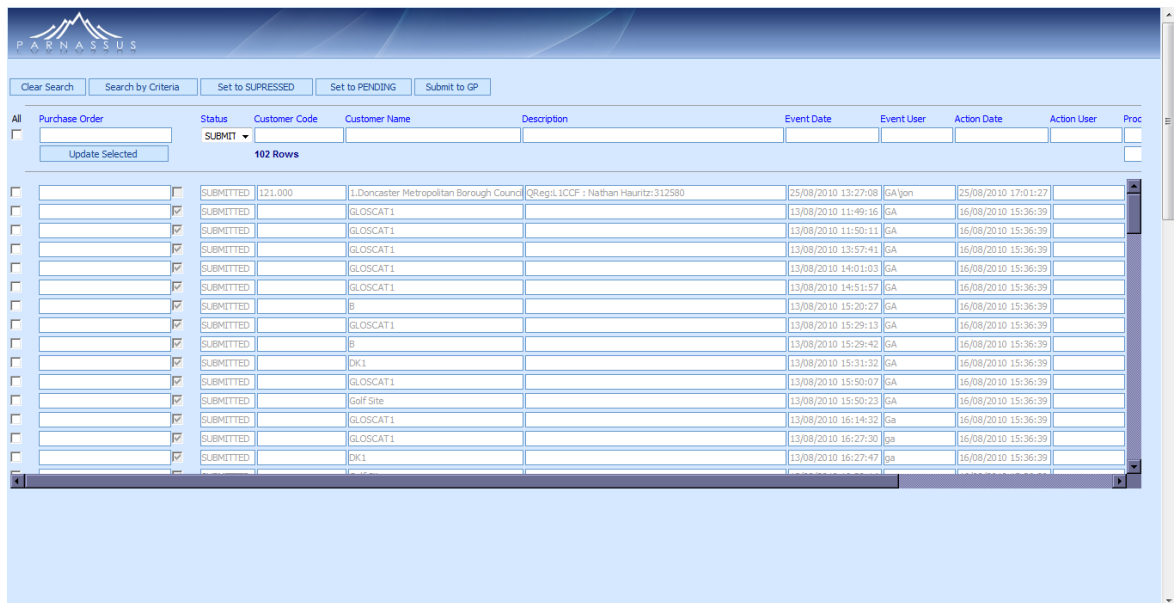
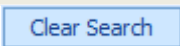


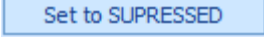

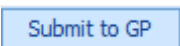
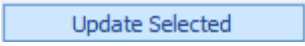


Figure 19-1 : Hermes – Finance Starter Kit

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 any existing search criteria
	Perform a search using the entered search criteria
	Select any rows which will be actioned.
	Set the selected row/s to a status of 'SUPRESSED'.
	Set the selected row/s to a status of 'PENDING'.
	Export the select row/s to the CSV export file.
	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
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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%.


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 Document Management

Parnassus has a document management module. Details of this are shown in a separate user guide. Please contact GA for further details.

23 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												
LearnerId	Created	Modified	Deleted	ModifiedUser	FirstName	LastName	MiddleName	Region	AddressIdValue	DOB	PreviousSurname1	PreviousSurname2
ea6b981-86ed-e411-8426-00155d037201	28/04/2015 10:11:10	02/10/2018 14:10:10	<input type="checkbox"/>	adminav	PLR Test	Testing	John			01/01/1991 00:00:00		
ea6b981-86ed-e411-8426-00155d037201	28/04/2015 10:11:10	02/10/2018 14:09:05	<input type="checkbox"/>	adminav	PLR Test	Test	John			01/01/1991 00:00:00		

Close

Figure 23-1 : Audit History in Parnassus