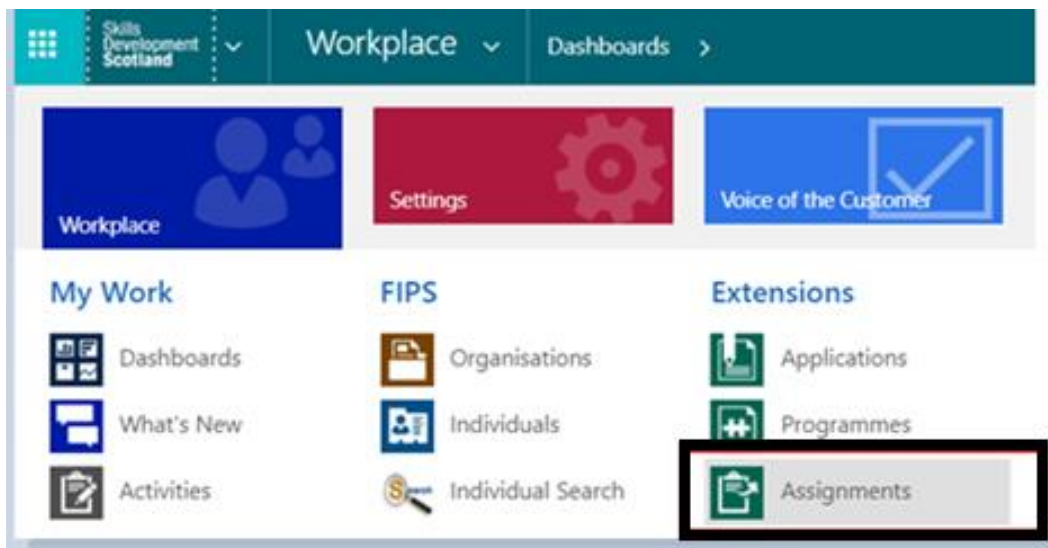


FIPS QUICK START GUIDE

How to Print an MA Assignment Summary

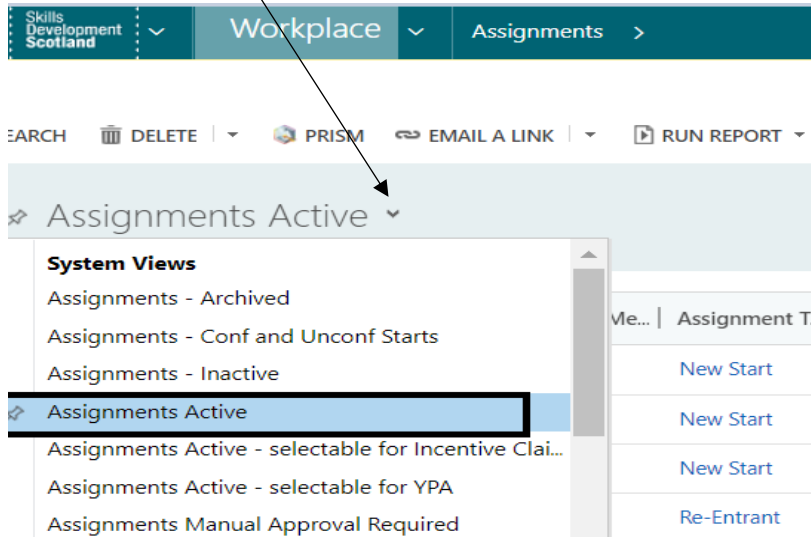
The MA Training Agreement has been updated for 2020/2021 and is now called MA Assignment Summary on FIPS. The MA Assignment Summary can be printed from the Assignment entity in FIPS.

1. To print a MA Assignment Summary, click into Workplace, then select the Assignments entity:



The populated MA Assignment Summary can be printed from several Assignment CRM Views (reports), however the view that will be used most often is the “Assignments Active” system view. Active Assignments are Assignments at draft status through to 6 months after leaving details have been entered.

2. Click on the drop-down arrow at the top left of the table and select “Assignments Active” from the list of CRM view:



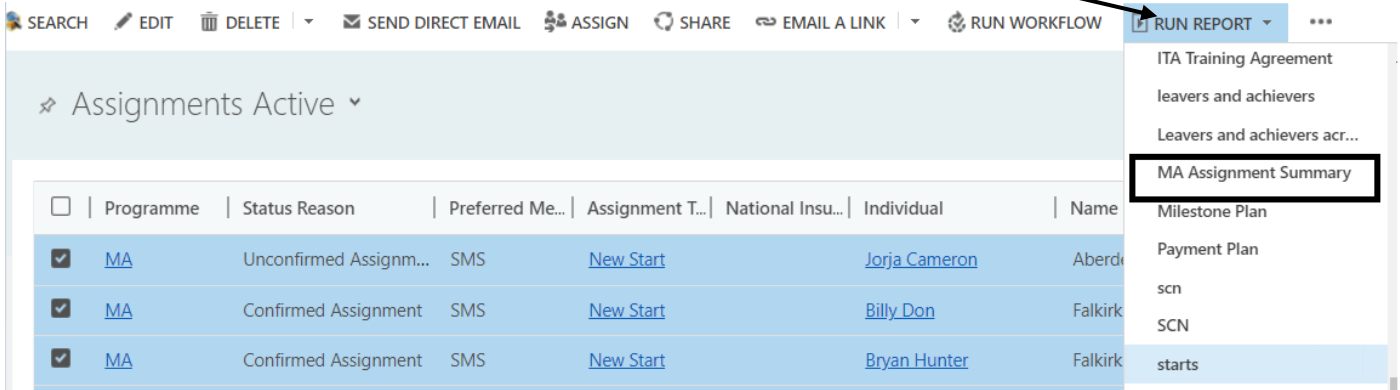
3. The report can be filtered by clicking on the filter icon at the top right of the view to access the filter functionality:

The screenshot shows the 'Assignments Active' view with a search bar 'Search for records' at the top right. Below is a table with columns: Programme, Status Reason, Preferred Me..., Assignment T..., National Insu..., Individual, Name (Local ...), Email (Individ...), Home Phone ..., Mobile Phon..., Age Group, Age at Training Start, and Expected End... A filter icon is highlighted with a black box at the top right of the table.

<input type="checkbox"/>	Programme	Status Reason	Preferred Me...	Assignment T...	National Insu...	Individual	Name (Local ...)	Email (Individ...)	Home Phone ...	Mobile Phon...	Age Group	Age at Training Start	Expected End...
<input checked="" type="checkbox"/>	MA	Unconfirmed Assignm...	SMS	New Start		Lozja Cameron	Aberdeenshire	test@test.com			16-19	19	11/01/2022
<input checked="" type="checkbox"/>	MA	Confirmed Assignment	SMS	New Start		Billy Don	Falkirk	test@test.com			25+	31	12/04/2022
<input checked="" type="checkbox"/>	MA	Confirmed Assignment	SMS	New Start		Bryan Hunter	Falkirk	test@test.com		07777777777	25+	41	12/04/2022
<input checked="" type="checkbox"/>	MA	Confirmed Assignment	SMS	New Start		William Bissett	Falkirk	test@test.com			25+	65	12/04/2022

- Click on the checkbox at the left of the table to tick and select the participants for whom you would like to print an MA Assignment Summary.

4. The MA Assignment Summary can be printed for one or multiple participants at the same time. When the relevant assignments are selected, click on Run Report at the top of the page and click MA Assignment Summary:



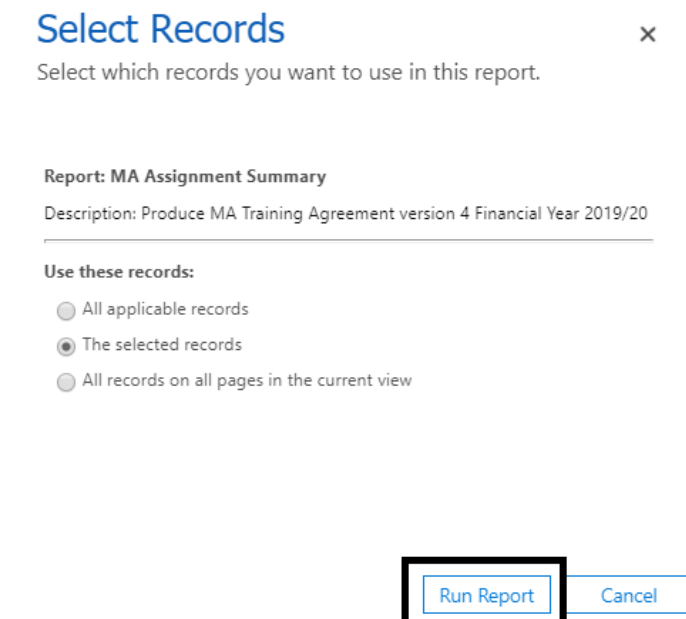
SEARCH EDIT DELETE SEND DIRECT EMAIL ASSIGN SHARE EMAIL A LINK RUN WORKFLOW RUN REPORT

IT Assignment Active

<input type="checkbox"/>	Programme	Status Reason	Preferred Me...	Assignment T...	National Insu...	Individual	Name
<input checked="" type="checkbox"/>	MA	Unconfirmed Assignm...	SMS	New Start		Jorja Cameron	Aberde...
<input checked="" type="checkbox"/>	MA	Confirmed Assignment	SMS	New Start		Billy Don	Falkirk...
<input checked="" type="checkbox"/>	MA	Confirmed Assignment	SMS	New Start		Bryan Hunter	Falkirk...

MA Assignment Summary

5. Choose the appropriate option from the Select Records dialog box which appears on screen and click on Run Report:



Select Records

Select which records you want to use in this report.

Report: MA Assignment Summary
Description: Produce MA Training Agreement version 4 Financial Year 2019/20

Use these records:

All applicable records
 The selected records
 All records on all pages in the current view

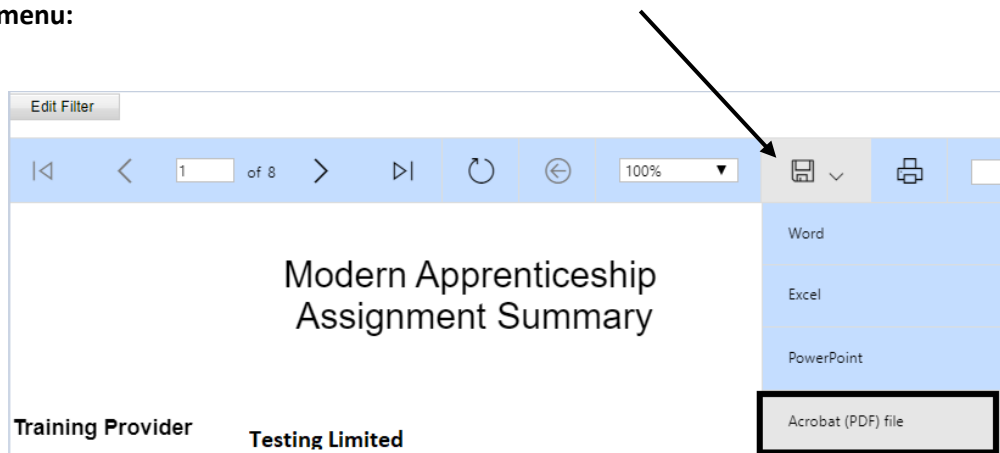
Run Report Cancel

- The populated Assignment Summary documents will then be generated and displayed on screen.

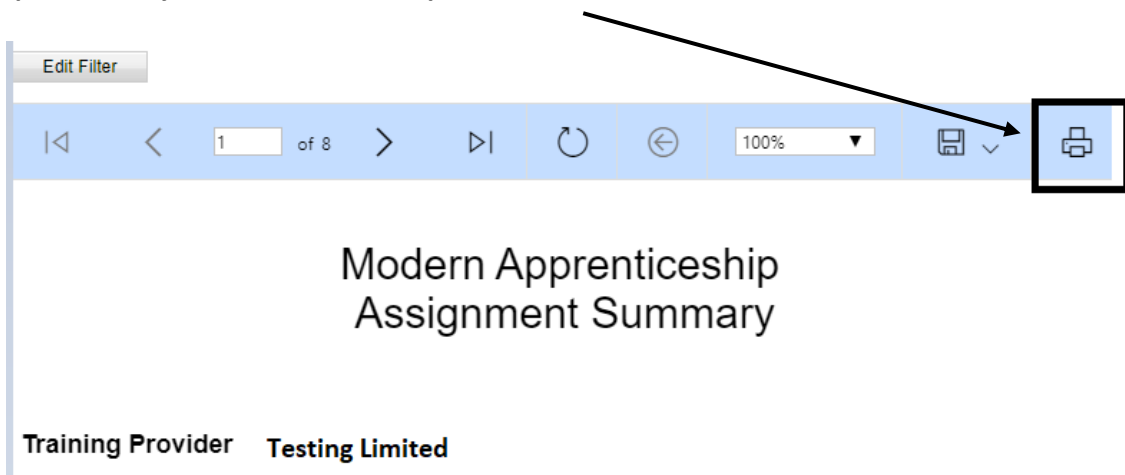
6. To review the printed documents on screen, click on the forward arrow:



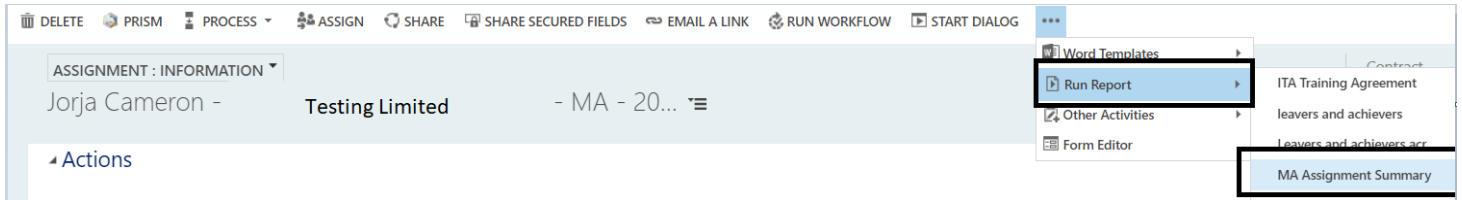
7. To export the MA Assignment Summary to PDF or other format, click on the export icon and select from drop-down menu:



8. To print directly from FIPS select the printer icon:



9. The MA Assignment Summary can also be printed from within an Assignment. Using the ellipses function, click on Run Report at the top of the Assignment screen then follow the steps above:



10.

Please note:

Prior to printing from FIPS for the first time you may be required to install the Microsoft ActiveX component.

If required, a pop up box will appear on screen when you try to print for the first time. You will require System Administrator rights to complete this action.