

FIPS QUICK START GUIDE

Adding an Employer and Employer Contact

The process for adding Employer Contact information in an application / assignment has changed. The employer contact details are no longer free text fields; Training Providers are required to search for the employer contact associated with the required employer or create a new employer contact for that organisation if it is not listed. This process will mean that the employer contact information (name, email address, contact number) is linked to the employer.

1. Within the application for an individual, navigate to the Employer Details header and use the 'Employer Search' box to search for the required Employer details:

2. Enter the Employer name into the Employer Name field and click on "search". Employer details matching the search that currently exist on FIPS will be displayed. If the employer required is displayed in the list use the "Select" button to attach this to the application. The "Status" field should be disregarded when reviewing the results:

Organisation Name	Company No.	Address	Status
Skills Development Scotland		29 East Port DUNFERMLINE KY12 7JG	
Skills Development Scotland		0/1 Monteith House 11 George Square GLASGOW 1anarkshire G2 1DY	Submitted For Approval

3. If no matching results are returned, a new employer record must be created. Click on "Create New Employer" after completing the first line of the address and the postcode in the fields to the right of the Employer Name:

A dialog box will appear asking you to confirm that you want to ‘Create new employer with the details entered’. A list of addresses for that postcode will be displayed. Select the correct address:



If the address details you require are not listed, select another address from the list and save. If there is a different company name attached to the address you require, disregard this. The Employer Name that was manually entered in the search will overwrite the results. Once the application has been submitted to an assignment, submit a Help Form to the FIPS Support Team to request that the address details are manually changed for the employer. The above address list is an external list from Royal Mail.

4. Once selected, the employer details will be automatically populated into the employer details section of the application. SIC Code (Standard Industrial Classification Code) is a locked field that can be disregarded. Priority Sector is a yes / no drop-down and this must be selected as this is a mandatory field.
5. For validation purposes (New start and claim validation), employer contact information is mandatory when creating a new employer contact. Employer contact first name, last name, email address and one contact number (mobile or landline) are required fields.
6. Once the employer address information has been populated, use the “Employer Contact Search” box to complete the employer contact search:

Employer County	🔒 Lanarkshire
Employer Country	🔒 -----
Employer Post Code	🔒 G5 0PQ
Priority Sector ⁺	No

Employer Contact Search

7. Complete the required fields within the search: First Name and Last Name are the only mandatory fields required to search for an employer contact as denoted by the red asterisk. If there are no results returned, the other fields become mandatory when creating a new employer contact:


First Name*	<input type="text" value="New"/>	Mobile Number	<input type="text"/>
Last Name*	<input type="text" value="Employer"/>	Telephone Number	<input type="text"/>
Email Address	<input type="text"/>		

8. If no results are returned, add in the relevant contact information and select “Create New Employer Contact”. A new employer contact record for this employer contact will be created:

First Name*	<input type="text" value="New"/>	Mobile Number	<input type="text"/>
Last Name*	<input type="text" value="Employer"/>	Telephone Number	<input type="text" value="01324999888"/>
Email Address	<input type="text" value="new.employer19@gmail.com"/>		

No results returned

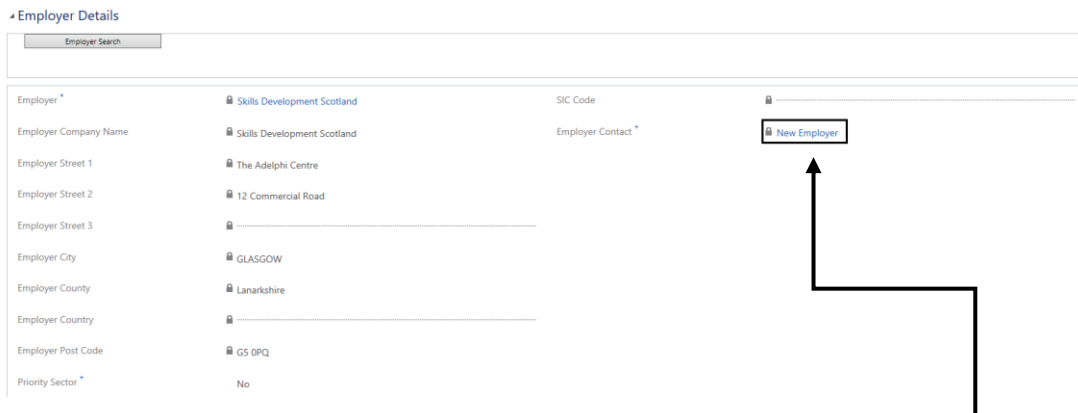
9. If results are returned, select the appropriate contact from the list displayed. Ensure the details entered are as accurate as possible – typos etc will mean that the results may not be returned:



The screenshot shows a search form with the following fields: First Name* (new), Last Name* (employer), Email Address (new.employer19@gmail.com), Mobile Number, and Telephone Number. Below the form are 'Search' and 'Reset' buttons. A message below the form states 'new.employer19@gmail.com is valid'. Below the form is a table with two columns: 'Full Name' and 'Employer Name'. The table contains one row: 'New Employer' and 'Skills Development Scotland'. To the right of the table is a button labeled 'Select Employer Contact'.

If a search is completed for a contact that has been previously created but no results are returned for that employer, send a FIPS Support Form with the employer and employer contact details. There should be no duplicate employer contact records created. As an example, if a Training Provider is adding 5 new start assignments that are all employed by the same company and have the same employer contact information, FIPS does not require that the employer contact is **created** for each assignment. The employer contact details should be created once and then should be displayed in the search results for Training Providers to select from the list.

10. Once complete, the employer contact will appear in the locked field within the Employer Details section:



The screenshot shows the 'Employer Details' form. The 'Employer Search' field is at the top. Below it are several fields: Employer*, Employer Company Name, Employer Street 1, Employer Street 2, Employer Street 3, Employer City, Employer County, Employer Country, Employer Post Code, and Priority Sector*. The 'Employer*' field is filled with 'Skills Development Scotland'. The 'Employer Contact*' field is filled with 'New Employer'. A red box highlights the 'New Employer' text, and a black arrow points from the box to the right.

11. To amend the details for the employer contact (change to name for the contact, change to the email address or contact number) click into the employer contact view by clicking on the employer contact name hyperlink. This will open a new screen that can be edited and saved.

12. The employer contact view (hyperlink) will open a new screen. The “individual type” will show as Employer. Full name, contact number(s) and email address can be edited in this view. Click into the field(s) to edit the details. Save using the save icon at the bottom right of the screen:

INDIVIDUAL : CONTACT ▾
Ross Ham ☰

CONTACT INFORMATION

Full Name *	Ross Ham
Email *	hammell@mctaggart
Home Phone	01294832195
Business Phone	01294832195
Mobile Phone
Individual Type	Employer
Company Name	MCTAGGART

13. To change the employer contact information within an assignment, the process is the same as above but this will be displayed differently to the application. To change the details in full, Employer Contact Search should be used under the Update Employer header:

Employer Contact Search

- ▶ Training Details
- ▶ Update Training Venue

14. To amend the details for the employer contact within the assignment (change to name for the contact, change to email address or contact number) click into the employer contact view by clicking on the employer contact name hyperlink. This will open a new screen that can be edited and saved. The edit screen will show as in point 12 (above).

The screenshot shows a web form titled "Update Employer". It is divided into two main sections. The first section, "Current Employer", contains a field for "Employer" with a red asterisk, a lock icon, and the text "Optima". The second section, "Current Employer Contact Details", contains a field for "Employer Contact" with a red asterisk, a lock icon, and the text "Bev Sinclair". This text is enclosed in a black rectangular box. Below this is a field for "Employer Contact Telephone" with a telephone icon and a lock icon.

15. For any Personal Views / Advanced Find reports that Training Providers have created to report the employer / employer contact data, these will need to be updated to show the new fields. The old fields will now show as "deprecated" on the Advanced Find column header.