## **FIPS QUICK START GUIDE**

## How to Print an MA Assignment Summary

This document will cover how to print the MA Assignment Summary on FIPS. The MA Assignment Summary can be printed from the Assignment entity and within an individual participant assignment in FIPS.



There is a video that covers this process – click on the play button to view this.

## 1. To print an MA Assignment Summary, click into the Assignments entity from the Workplace menu:



The populated MA Assignment Summary can be printed from several of the system views within the Assignments entity, however the view that will be used most often is the "Assignments Active" view. Active Assignments will show any Assignments at draft status through to 6 months after leaving details have been entered, when they go to Leaver Archived status.



2. Click on the drop-down arrow to view the system views and select "Assignments Active" from the list of system views. It may default to Assignments Active when the entity is clicked into:

Assignme	ents Active ~								•	Search	this view	Q
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ssignments A	Active	42			Kenneth South Avrshire			50	17/11/2021			
ssignments -	- Archived	-12										
ssignments -	- Conf and Unconf Starts	-12	New Start		Mark Or North Lanarkshire		25+	48	15/03/2023			-
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ssignments A	Active - selectable for Incentive Claim	-12	New Start		Mary Lor Shetland Islands		20-24	23	26/11/2022			-
ssignments A	Active - selectable for YPA	-12	New Start		Alexandı Fife		25.4	01	14/01/2023			
ssignments A	All	-12	New Start		Alexandi The		237	45	14/01/2023			
ssignments N	Manual Approval Required	-12			Jamie W Fife			17	16/04/2021			
ssignments o	on Hold	-12			Ryan Mc South Ayrshire			19	12/01/2022			-
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ulk Transfer N	Manual Approval Required	-12	New Chest		Distant, Elfa		46.40	10	22/01/2024			
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F - No contra MA	acted LEP Area Draft	-⊨ ▼ Email			Robert J. Renfrewshire		25+	27	17/01/2023			
MA	Draft	Email			Mark Sm Fife		20-24	24	18/01/2023			-
ITA	Unconfirmed Assignment	Email			Darren A Dundee City			24	11/11/2021			-
МА	Manual Approval Required	SMS			Emma Li Aberdeenshire		20-24	21	24/01/2022			

3. The view can be filtered by clicking on the column header to be filtered which will display the filter functionality. In this example, status reason has been selected to filter:

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ITA	↑ Sort A to Z		Email	
MA	↓ Sort Z to A		SMS	New Start
ITA	√ Filter by		Email	
МА	Unconfirmed Assignment		SMS	New Start
MA	Confirmed Assignment		Email	New Start



4. Once filtered if required, select the assignment records that the MA Assignment Summary is to be printed for. Click on the checkbox at the left of the row to highlight the participants required. When records have been selected, the Run Report option will be displayed in the ribbon menu:

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~	MA	Confirmed Assignment	SMS	New Start	Janet Lo Edinburgh, City of		25+	67	18/07/2022					
~	ИА	Confirmed Assignment	SMS	New Start	Stuart A Fife		16-19	16	16/01/2023					
	MA	Confirmed Assignment	SMS	New Start	Rae-Ann Highland		25+	26	24/10/2022					
	MA	Confirmed Assignment	SMS	New Start	Siobhan Fife		16-19	18	23/03/2022					
	MA	Confirmed Assignment	Email	New Start	Kirsty M. Perth & Kinross		20-24	23	18/11/2021					
	MA	Confirmed Assignment	SMS	New Start	Cameror East Ayrshire		16-19	19	15/01/2022					

5. The MA Assignment Summary can be printed for one or multiple participants at the same time from this view. When the relevant assignments are selected, click on Run Report and select MA Assignment Summary from the list of reports:

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	MA	Confirmed Assignment	SMS	New Start	Siobhan Fife	🔟 Milestone Plan	18	23/03/2022				
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6. Choose the appropriate option from the Select Records popup box which appears on screen and click on Run Report to generate the MA Assignment Summary documents for the selected assignments:

Select Records		×
Select which records you want to use	in this report.	
Report: MA Assignment Summary		
Description: Produce MA Training Agreement v	version 4 Financial Ye	ar 2019/20
Use these records:		
<ul> <li>All applicable records</li> </ul>		
The selected records		
<ul> <li>All records on all pages in the current view</li> </ul>	N	
	Run Report	Cancel
	Runneport	Cancel

7. To review the printed documents prior to printing, click on the arrows:





- 8. To export the MA Assignment Summary to PDF or another format, click on the save icon and select the format from drop-down menu.
  - Edit Filter Id < 1 of 8 > PI © © 100% I C E
- 9. To print directly from FIPS select the printer icon:

10. The MA Assignment Summary can also be printed form within a participant's assignment. Using the Run Report function on the ribbon menu, select the MA Assignment Summary from the list and follow the steps detailed above:

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