

MIS (ProSolution)/LMS (PICS) Integration User Guide

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1. Introduction

As part of OneAdvanced commitment to supporting integration between our products, we have developed the necessary functionality to support the integration with our marketing leading management information system MIS (ProSolution) and our SaaS based Learner Management System solution LMS (PICS).

Features include:

- Seamless integration between the two systems
- Exporting organisation and contacts details from MIS (ProSolution) to LMS (PICS).
- Exporting the Parent and Child Apprenticeship Offerings from MIS (ProSolution) to LMS (PICS).
- Importing Applicant Data from LMS (PICS) to MIS (ProSolution).

2. Pre-Requisites

2.1 Versions

To utilise the MIS (ProSolution)/LMS (PICS) Integration, the following versions need to be installed:

- ProSolution version must be 25.2 or later
- ProAPI version 25.2.0 or later

3. Configuration & Settings

The MIS (ProSolution) and LMS PICS integration utilises ProAPI to connect the two systems.

3.1 Configuring the Integration

The following MIS (ProSolution) settings and LMS (PICS) settings need to be configured for the Onboarding integration.

3.2 Creating an API User in LMS PICS

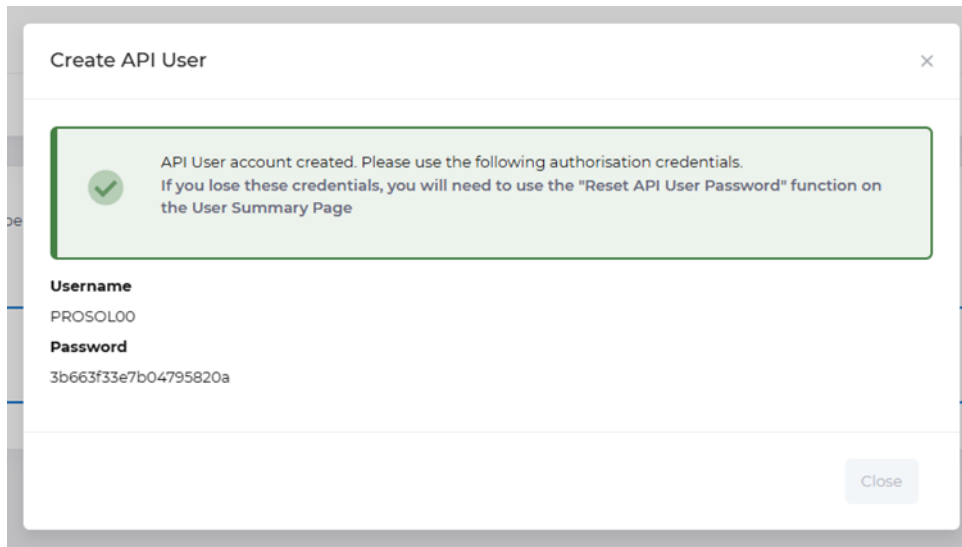
To call LMS PICS API, you need to create an API User within the product.

- Open your Apprenticeship Onboarding tenant and access the **Users and Access** menu.
- Access **Users and Permissions**.
- From this page, click **Actions** and **Create API User**

The screenshot shows the 'Users and Access' section of the oneAdvanced interface. On the left is a sidebar with navigation options like Reports, Sections, Learners, Applicants, Organisations, Officers, Vacancies, Opportunities, Forms, Imports, and Configuration. The main area displays a 'User List' table with columns for Name, Email, Department, Officer Job Title, Officer, User Group, and Last Log. A table of users is visible, including Curtis Rose-Nicholls, Gav Willis, Harry Kemp, James Francis, Karen Fitzsimmons, Michael Smith, Rajesh Panchal, Ryan Mahoney, and Steven Shiers. An 'Actions' dropdown menu is open on the right, showing options like '+ Create User', '+ Create Group', '+ Create API User' (highlighted), 'Idle Time Out Setting', 'Notification Message', and 'Temporary PICS LMS Support Access'.

Name	Email	Department	Officer Job Title	Officer	User Group	Last Log
Curtis Rose-Nicholls	curtis@pelcomp.co.uk			Curtis Rose-Nicholls		18/06/20
Gav Willis	gavin@pelcomp.co.uk			Gav Willis		03/10/2024 16:46:24
Harry Kemp	harry.kemp@oneadvanced.com		Support	Harry Kemp		07/10/2024 17:02:09
James Francis	james@pelcomp.co.uk			James Francis		08/07/2025 14:09:14
Karen Fitzsimmons	karen.fitzsimmons@oneadvanced.com			Karen Fitzsimmons		17/10/2024 17:33:00
Michael Smith	msmith@pelcomp.co.uk			Michael Smith		
Rajesh Panchal	RajeshKumar.Panchal@oneadvanced.com			Rajesh Panchal		09/07/2025 06:11:01
Ryan Mahoney	ryan.mahoney@oneadvanced.com			Ryan Mahoney		09/07/2025 11:26:06
Steven Shiers	steven.shiers@oneadvanced.com			Steven Shiers	Administrators	25/06/2025 12:58:25

- Complete the **Name** and click **Save**.
This will generate API User credentials (API URL, Username and Password) which will be used to connect to LMS PICS API in ProSolution.



3.2 MIS (ProSolution) System Settings

The following ProSolution system settings are required to be completed as part of the MIS (ProSolution) and LMS (PICS) Integration. These settings are under the System Setting Area PICS LMS:

- **PICS LMS API URL**

This system setting allows the user to set the API URL required to connect to PICS LMS. Details on how to obtain the API URL can be found in section 3.2 above. The PICS API URL this follows the structure: **[tenantname].picsweb.co.uk**

- **PICS LMS Username**

This system setting allows the user to set the username required to connect to PICS LMS. Details on how to obtain the PICS LMS Username can be found in section 3.2 above.

System Setting Details (PICSLMSUsername, PICS LMS Username)

Setting Area: PICS LMS

Setting Type: Text

Code: PICSLMSUsername

Description: PICS LMS Username

Setting: PROSOLAP

Detailed Description: This is the username required to connect to PICS LMS.

Detailed Description Options: PICS LMS Username

Buttons: Restore Default, Close, Save, Save & Close

- **PICS LMS Password**

This system setting allows the user to set the password required to connect to PICS LMS. Details on how to obtain the PICS LMS Password can be found in section 3.2 above.

System Setting Details (PICSLMSPassword, PICS LMS Password)

Setting Area: PICS LMS

Setting Type: Encrypted

Code: PICSLMSPassword

Description: PICS LMS Password

Setting: *****

Confirm Setting: *****

Detailed Description: This is the password required to connect to PICS LMS.

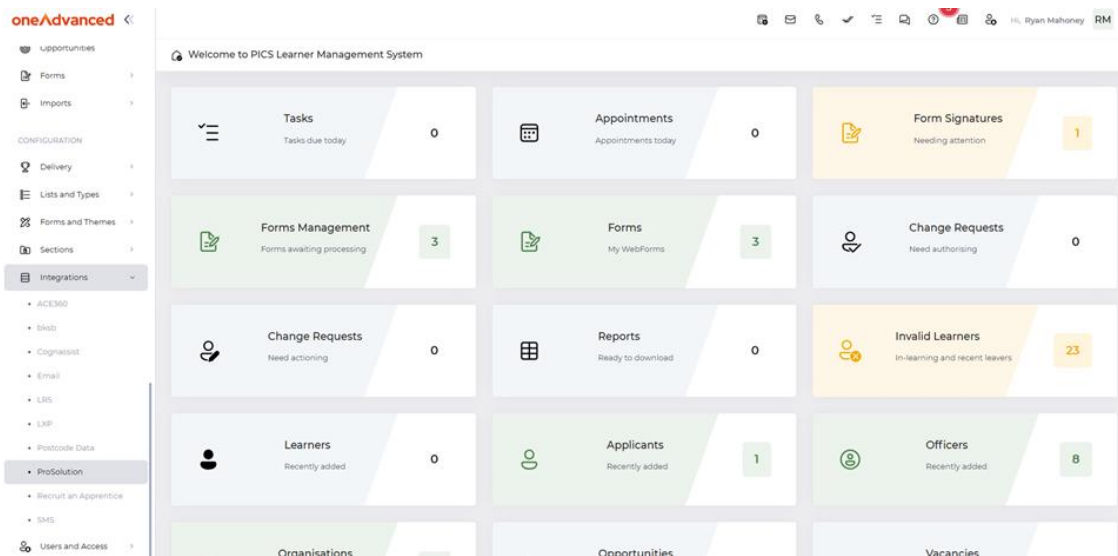
Detailed Description Options: PICS LMS Password

Buttons: Restore Default, Close, Save, Save & Close

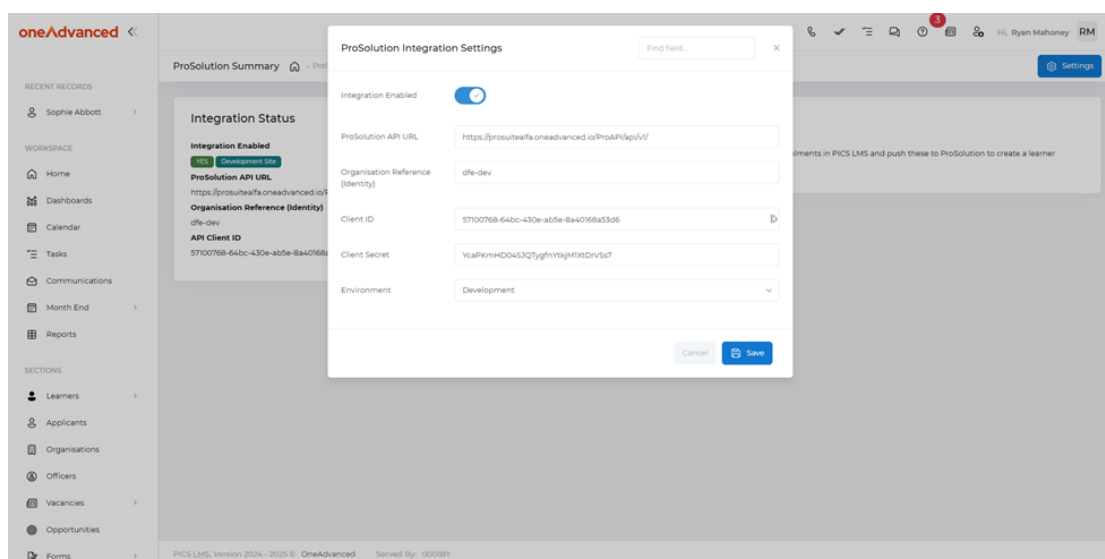
3.3 Configuring the Integration with ProSolution

To set up the integration in LMS PICS:

- open your LMS PICS tenant
- access the **Integrations** menu
- select **ProSolution**.



- Within the integration page, click **settings** located in the top right-hand corner. This will open the settings panel, where the integration can be enabled and ProAPI Credentials can be entered.



Shown above with development data present.

Please enter the following information into the relevant fields shown in the settings panel:

- **ProSolution API URL** – This will be known from the set-up of ProAPI (see ProAPI Installation and Set Up Guide section 2.2.3)
- **Organisation Reference from Identity** – see ProAPI Installation and Set Up Guide – section 2.2.3
- **Client ID** – see ProAPI Installation and Set Up Guide – section 2.2.3
- **Client Secret** – see ProAPI Installation and Set Up Guide – section 2.2.3
- **Environment** – This should be set as **Live**.

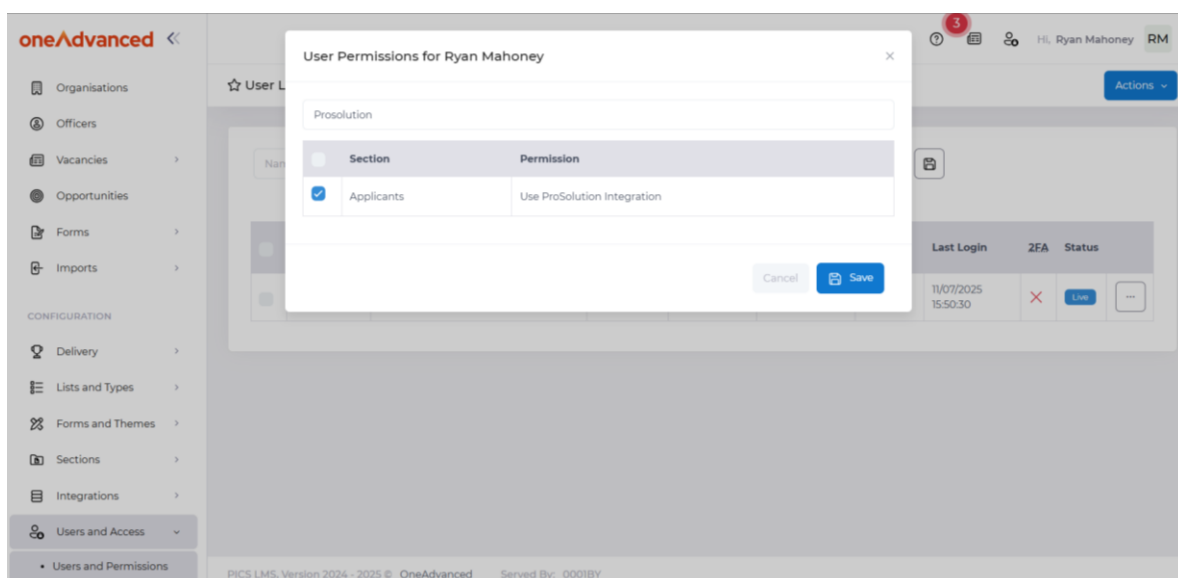
3.4 ProSolution User Permission

With the ProSolution integration is enabled in PICS, Applicants will then be able to be enrolled into ProSolution.

For this option to be available, the User must have the ProSolution permission applied.

A system administrator can apply this by:

- Accessing **Users & Access**
- Open **Users & Permissions**
- Search for the relevant user
- Via the permissions option, assign the permission **Use ProSolution Integration** which will be categorised under Applicants.



3.5 MIS (ProSolution) Tasks

The following Tasks need to be enabled for the Organisation, Contact and Staff data to be transferred to LMS (PICS). By default, these tasks are disabled.

- Export Organisations to PICS LMS

Configured Task Details (Export Organisations to PICS LMS)

Task Details
Please specify the basic task details and how the task will be triggered

Task Step(s)
Final Step

Description: Export Organisations to PICS LMS

Is Enabled: ☒ Task Expires: / / : Priority: Medium

Show Message: ☐

Task Owner: Administrator Alert Level: Only Errors

Trigger Type: Data Source Categories: ...

Warm Owner After (Mins): 0 About Task After (Mins): 0

Data Source Details
Data Source: Organisation

New: ☒ Delete: ☐ Edit: ☐ Column Changed: ☒ Columns: Can Be Contact By Email, Can Be Contact By Phone, Can Be Col

Before Filter (Edit and Delete)
Filter Description: ...

After Filter (New and Edit)
Filter Description: Address Type ID = 3

Context the trigger applies to: ...

Run the task: ☒ Immediately ☐ After a delay of 0 Hour(s) 0 Minute(s)

Created: rajeshkumar.panchal On 07/04/2025 13:26:30, Last Modified: rajeshkumar.panchal On 17/06/2025 20:08:27

- Export Organisation Contacts to PICS LMS

Configured Task Details (Export Organisation Contacts to PICS LMS)

Task Details
Please specify the basic task details and how the task will be triggered

Task Step(s)
Final Step

Description: Export Organisation Contacts to PICS LMS

Is Enabled: ☒ Task Expires: / / : Priority: Medium

Show Message: ☐

Task Owner: Administrator Alert Level: Only Errors

Trigger Type: Data Source Categories: ...

Warm Owner After (Mins): 0 About Task After (Mins): 0

Data Source Details
Data Source: Organisation Contact

New: ☒ Delete: ☐ Edit: ☐ Column Changed: ☒ Columns: Email, First Name, Is Primary, Surname, Tel

Before Filter (Edit and Delete)
Filter Description: ...

After Filter (New and Edit)
Filter Description: Is Primary = True

Context the trigger applies to: ...

Run the task: ☒ Immediately ☐ After a delay of 0 Hour(s) 0 Minute(s)

Created: rajeshkumar.panchal On 09/04/2025 14:02:46, Last Modified: rajeshkumar.panchal On 17/06/2025 20:06:30

- Export Staff to PICS LMS

Configured Task Details (Export Staff to PCS LMS)

Steps

Task Details

Task Step(s)

Final Step

Task Details

Please specify the basic task details and how the task will be triggered

Descriptions:

Export Staff to PCS LMS

Is Enabled:

☒

Task Express:

/ /

Priority:

Medium

Show Message:

☐

Task Owner:

Administrator

Alert Level:

Only Errors

Trigger Type:

Data Source

Categories:

Warn Owner After (Mins):

About Task After (Mins):

Data Source Details

Data Source:

Staff

New:

☒

Delete:

☐

Edit:

☐

Column Changed:

☒

Columns:

First Name,Is Current,Mobile Tel,Surname,Sync To PCS,System

Before Filter (Edit and Delete)

Filter Description

Is Current = True

Sync To PCS = True

After Filter (View and Edit)

Filter Description

Context the trigger applies to:

Change...

Run the task:

☒ Immediately

☐ After a delay of

0

Hour(s)

0

Minute(s)

Created: regis@kumar.panchal On 28/04/2023 14:10:44, Last Modified: regis@kumar.panchal On 17/06/2023 20:05:58

Cancel

< Back

Next >

Finish

4. How the integration works

The MIS (ProSolution) and PICS LMS integration uses the organisation, organisation contacts and Offering data recorded in MIS (ProSolution) and passes this data into LMS (PICS).

4.1 Organisations

On creation of an Organisation or update of an existing Organisation, the task Export Organisations to PICS LMS is triggered and the data is sent to PICS LMS.

Organisation will only be exported when all the following criteria is met:

- Organisation must be flagged as active
- The new Sync to PICS is set as True
- Organisations Address has a Primary Address record where the Address Type ID = 3

An initial export of existing Organisations can be triggered to be sent to PICS LMS. This task (Bulk Post Organisations to PICS) uses the same criteria as mentioned above.

The Bulk Post Organisations to PICS should be **run once** during the onboarding process but should be run **outside of working hours** (we recommend scheduling the task to start at 03:00 to avoid any other overnight processes within MIS ProSolution or PICS LMS overnight maintenance window) as this task will take some time to complete depending on the volume of data being exported. Note that this task is disabled by default and should only be enabled when instructed during the onboarding process.

The Bulk Post Organisation task may show as an errored state, please check the task history as the task is not likely to have errored in full but individual records which fail validation, those records are listed with the task history detail and should be resolved individually.

4.2 Contacts

On creation of an Organisation Contact or update of an existing Organisation Contact, the task Export Organisation Contacts to PICS LMS is triggered and the data is sent to PICS LMS.

Only organisation contacts that are Primary will be exported to PICS for new organisations.

4.3 Offerings

PICS Qualification Plans now can import ProSolution Course Offerings. The ProSolution Apprenticeship Offerings should be in Parent and Child structure for their application to the PICS Qualification Plans.

This can be accessed via Delivery > Qualification Plans. With the integration set up and enabled, the qualification plan page will have a new button listed under the Actions area "Create from ProSolution Course Offering"

The screenshot shows the 'Qualification Plans' page in the oneAdvanced system. The page has a sidebar on the left with navigation options like Calendar, Tasks, Communications, Month End, Reports, and various sections including Learners, Applicants, Organisations, Officers, Vacancies, Opportunities, Forms, and Imports. The main content area displays a table of qualification plans. The table has columns for Code, Title, Programme Type, For Learners, For Applicants, and Status. A search bar is located at the top right, and a 'Create' button is visible. The table lists several qualification plans, including 'Assistant Accountant Apprenticeship Standard Levy (OneFile)', 'Assistant Accountant Apprenticeship Standard Non-Levy (OneFile)', 'Kirsty Test', 'Adult Care Worker Level 2 Levy', 'Adult Care Worker Level 2 Non-Levy', 'AEB - EAL L2 Applying Business Improvement Techniques', 'AEB - Introduction to Self Employment', 'All AEB Quals', 'ALL BTEC Subsidiary Diploma in Business L3', and 'Assistant Puppet Maker - Levy'.

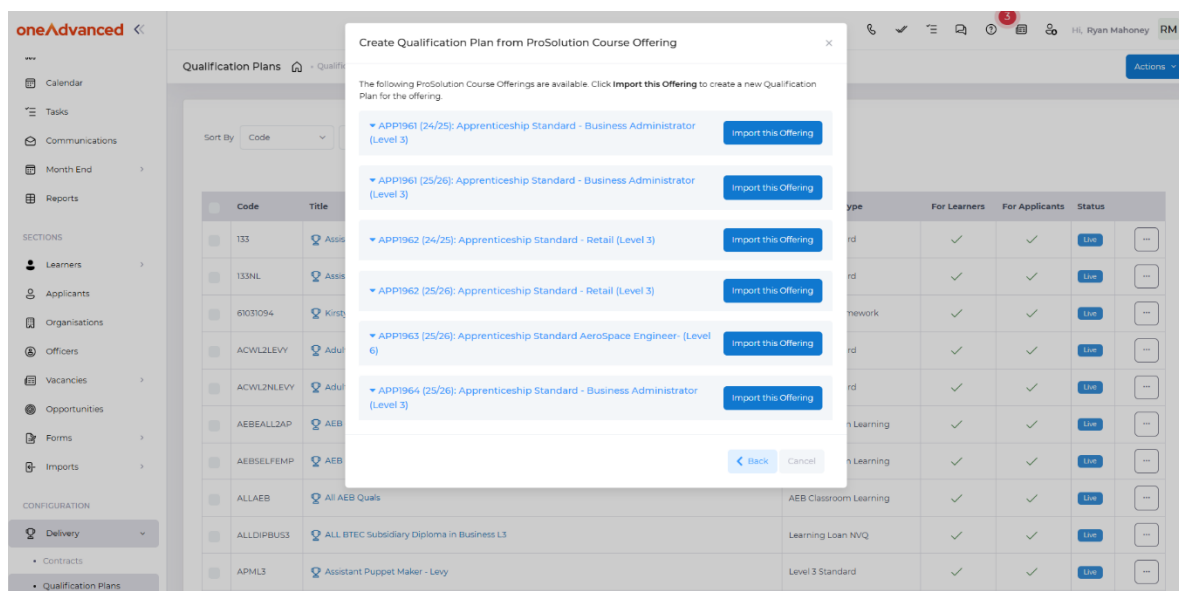
Code	Title	Programme Type	For Learners	For Applicants	Status
133	Assistant Accountant Apprenticeship Standard Levy (OneFile)	Level 3 Standard	✓	✓	Live
133NL	Assistant Accountant Apprenticeship Standard Non-Levy (OneFile)	Level 3 Standard	✓	✓	Live
61031094	Kirsty Test	Advanced Framework	✓	✓	Live
ACWL2LEVY	Adult Care Worker Level 2 Levy	Level 2 Standard	✓	✓	Live
ACWL2NLEVY	Adult Care Worker Level 2 Non-Levy	Level 2 Standard	✓	✓	Live
AEBEALL2AP	AEB - EAL L2 Applying Business Improvement Techniques	AEB Classroom Learning	✓	✓	Live
AEBSELFEMP	AEB - Introduction to Self Employment	AEB Classroom Learning	✓	✓	Live
ALLAEB	All AEB Quals	AEB Classroom Learning	✓	✓	Live
ALLDIPBUS3	ALL BTEC Subsidiary Diploma in Business L3	Learning Loan NVQ	✓	✓	Live
APML3	Assistant Puppet Maker - Levy	Level 3 Standard	✓	✓	Live

Clicking this will display a new page which allows users to search for course offerings that exist in the linked ProSolution instance. Users can search for course offering using Offering Code, Offering Name, Standard Code or site. Clicking search will return results based on the outlined search criteria.

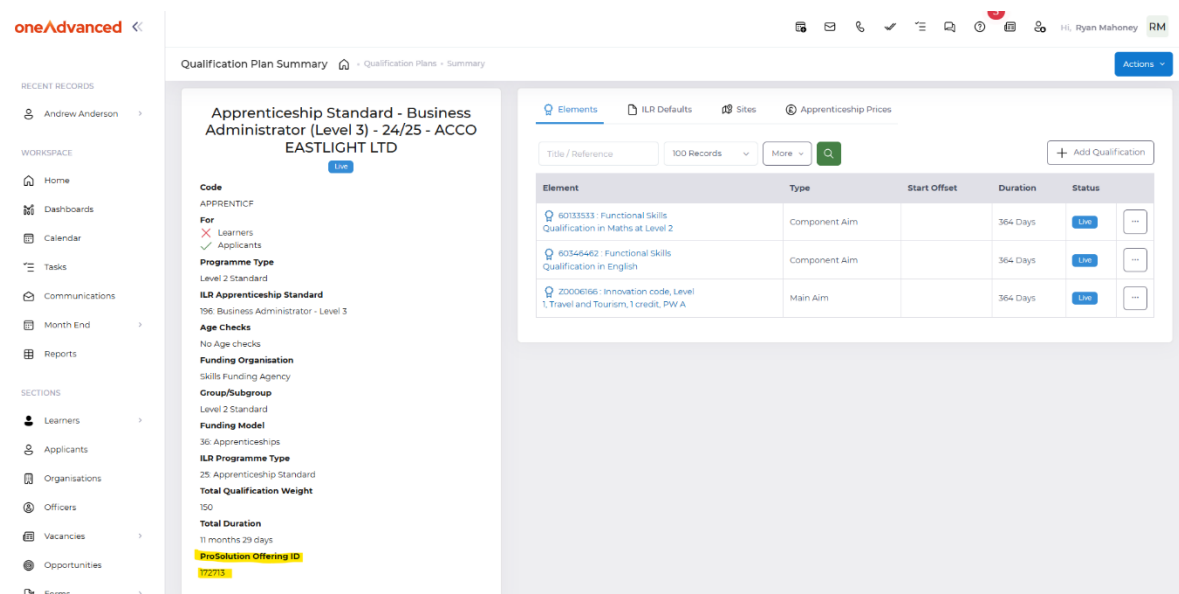
If no search criteria are present then all course offerings will be returned, note that there is an integration level filter hardcoded that limits only Offerings for the current and next academic year.

The screenshot shows the 'Qualification Plans' page with a modal dialog box open. The dialog box is titled 'Create Qualification Plan from ProSolution Course Offering'. It contains search fields for 'Offering Code', 'Offering Name', 'Standard Code' (with a dropdown menu showing '[blank]'), and 'Site'. There are 'Cancel' and 'Search' buttons at the bottom of the dialog. The background shows the same table of qualification plans as the previous screenshot.

The returned course offerings will display, as shown below:



Clicking 'Import this offering' will import the course offering from ProSolution into PICS as a Qualification Plan. This includes all parent and child qualifications. The key data field to bear in mind is the ProSolution Offering ID (highlighted below)



With the Course Offering imported into PICS. User can review the child offerings which have been imported into the Qualification plan as Aims listed under the Qualification Plans elements.

4.4 Applicant Data

4.4.1 Creating a Learner in ProSolution via LMS PICS Applicant Record.

The screenshot displays the 'Applicant Summary' page for Kris Stanyard. The left sidebar contains navigation options like 'RECENT RECORDS', 'WORKSPACE', and 'SECTIONS'. The main content area shows the applicant's profile with a 'KS' avatar and a status of 'Ready for Enrolment as a Learner'. Below this, the 'Applicant Details' section shows the username 'Not specified' and a 'Create Login for Applicant' button. The 'ProSolution Enrolment ID' is 1809. On the right, the 'Recent Activity' section shows a timeline of events, including status changes and workflow additions. The 'Actions' menu is open, highlighting the 'Create ProSolution Enrolment' option.

For an applicant to successfully be enrolled into ProSolution, there are some pre-requisite criteria that needs to be met, this is often covered as applicants are entered into PICS.

These include ensuring that an onboarding workflow is configured with the status set in Ready to Create a Learner. With this set in the workflow, any applicant that is set to the appropriate status, a new button will appear on the Actions menu of an applicant: **Create ProSolution Enrolment**.

This screenshot is similar to the previous one, showing the 'Applicant Summary' page for Kris Stanyard. The 'Applicant Details' section now shows the username 'Not specified' and a 'Create Login for Applicant' button. The 'ProSolution Enrolment ID' is 1820. The 'Recent Activity' section shows a timeline of events, including status changes and workflow additions. The 'Actions' menu is open, highlighting the 'Create ProSolution Enrolment' option.

When clicked, the new action will create a new import record containing the data we want to send across to ProSolution. PICS collates this data by obtaining the same list of import fields used when transferring an applicant to a learner as normal in PICS.

[For more information on setting Applicant Workflow Setting please refer to guidance available here.](#)

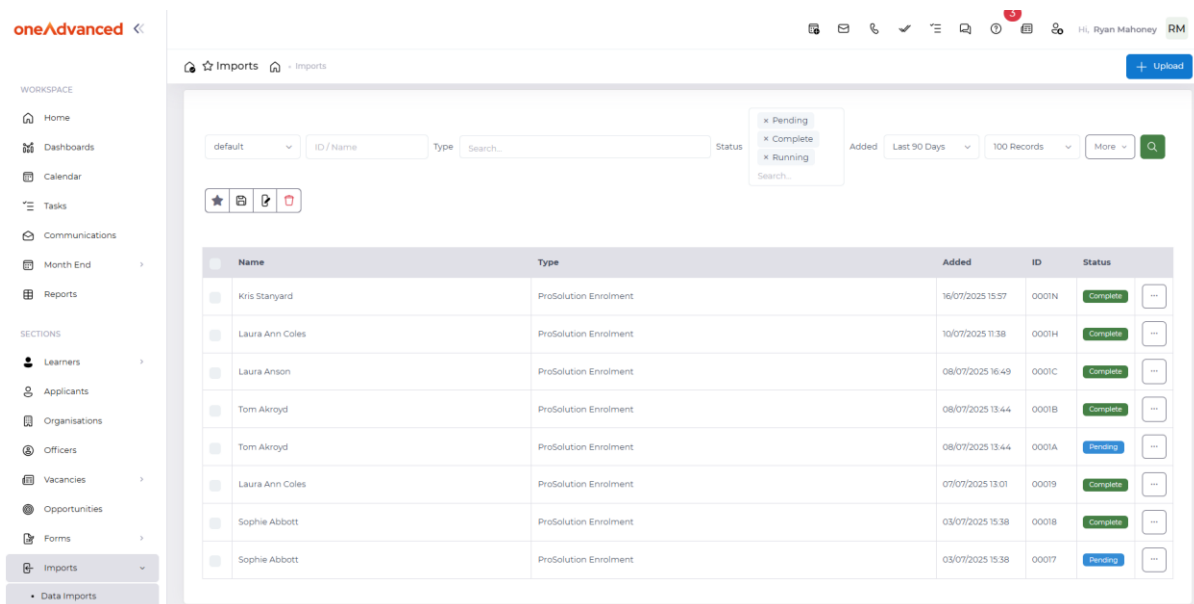
To create the enrolment, several criteria must be met:

- The applicant must have a qualification plan assigned
- The qualification plan must have a ProSolution Offering ID assigned. (This is assigned when a course offering is imported into PICS LMS from ProSolution)
- The applicant must have a Start Date set on the Programme page.

This can be dealt with by capturing this information within in Application Form (PICS Sign up form) additionally, you can also set default workflows, initial workflow status and qualification plans against an Application Form.

[For more information on setting default workflow, statuses and Qualification plans within PICS Sign up Forms, please refer to guidance available here.](#)

Once the applicant has been enrolled into ProSolution, a record is populated in the import page and marked as complete.



The screenshot shows the 'Imports' page in the oneAdvanced system. The page has a sidebar with navigation options like Home, Dashboards, Calendar, Tasks, Communications, Month End, Reports, Learners, Applicants, Organisations, Officers, Vacancies, Opportunities, Forms, and Imports. The main content area displays a table of import records. Above the table, there are filters for 'default', 'ID / Name', 'Type', 'Status', 'Added', 'Last 90 Days', '100 Records', and a 'More' dropdown. The table has columns for Name, Type, Added, ID, and Status. The records show various applicants and their enrolment details.

Name	Type	Added	ID	Status
Kris Staryard	ProSolution Enrolment	16/07/2025 15:57	0001N	Complete
Laura Ann Coles	ProSolution Enrolment	10/07/2025 11:38	0001H	Complete
Laura Anson	ProSolution Enrolment	08/07/2025 16:49	0001C	Complete
Tom Alkroyd	ProSolution Enrolment	08/07/2025 13:44	0001B	Complete
Tom Alkroyd	ProSolution Enrolment	08/07/2025 13:44	0001A	Pending
Laura Ann Coles	ProSolution Enrolment	07/07/2025 13:01	00019	Complete
Sophie Abbott	ProSolution Enrolment	03/07/2025 15:38	00018	Complete
Sophie Abbott	ProSolution Enrolment	03/07/2025 15:38	00017	Pending

The applicant record workflow is also set to the value set in **Imported as Learner Status** in the workflow.

The imports page will show any completed enrolments so the data can be viewed, along with the ability to re-enrol using the same data. To re-enrol an applicant, simply select their record in the import page and click the more icon against the record and select Re-enrol.

4.4.2 Creating Learner in ProSolution via LMS PICS WebForms.

Learner can also be enrolled into ProSolution by utilising LMS PICS Webforms.

As part of this integration, a new type of webform has been created. This is called the **ProSolution Learner Webform**.

Functionality of this new webform is very similar to the Learner Webform that LMS PICS utilises outside of onboarding.

To enrol a Learner in ProSolution via PICS ProSolution Learner Webform, the applicant must be on a workflow and must have reached the status for **Ready to Enrolment As a Learner**

With this workflow status set, the actions button will now include the option to **Sign up Learner in Webforms**.

The screenshot displays the 'Applicant Summary' page for Kris Stanyard. The left sidebar contains navigation options like 'RECENT RECORDS', 'WORKSPACE', and 'SECTIONS'. The main content area shows the applicant's profile with a blue circle containing 'KS' and the status 'Ready for Enrolment as a Learner'. Below this, the 'Applicant Details' section shows 'Username: Not specified' and a 'Create Login for Applicant' button. The 'ProSolution Enrolment ID' is 1820. On the right, the 'Recent Activity' section shows a timeline of events, including 'Status changed to Ready for Enrolment as a Learner by RYANMAHO' and 'Status changed to New Applicant by RYANMAHO'. The 'Actions' menu is open, showing options like 'Edit', 'Edit in WebForms', 'Sign up Learner in WebForms', 'Create ProSolution Enrolment', 'Clone Applicant', and 'Generate Document'. The 'Sign up Learner in WebForms' option is highlighted.

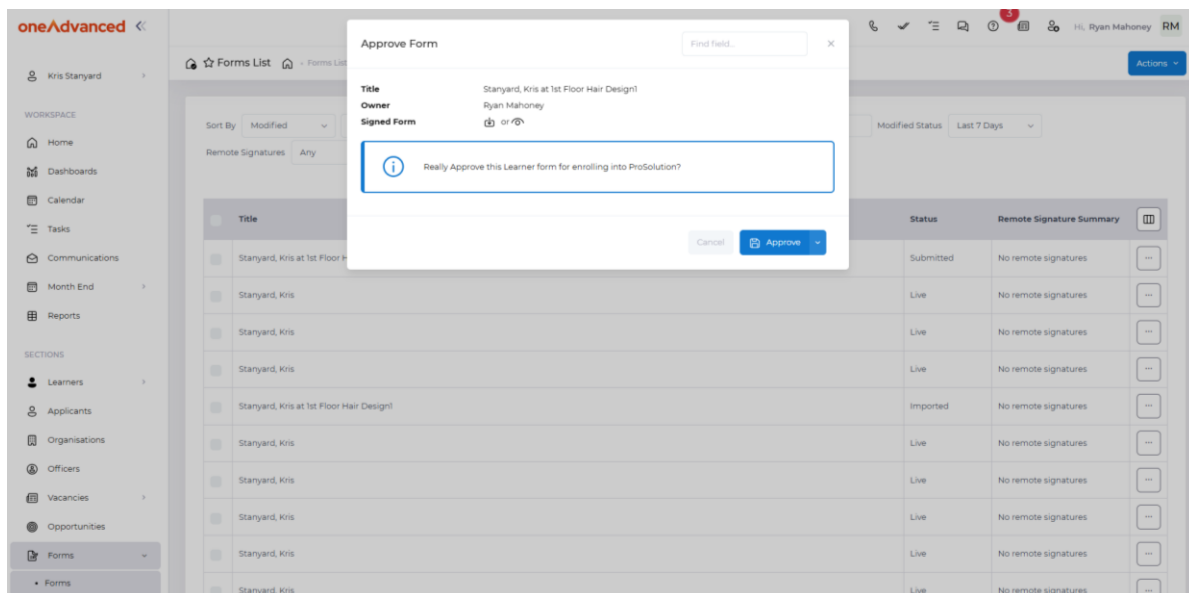
When this is clicked, you will be asked to allocate a webform. Utilising the dropdown, select the webform that has been set up for Enrolment.

With the form selected. Selecting save will allocate the Webform will be allocated to the Applicant.

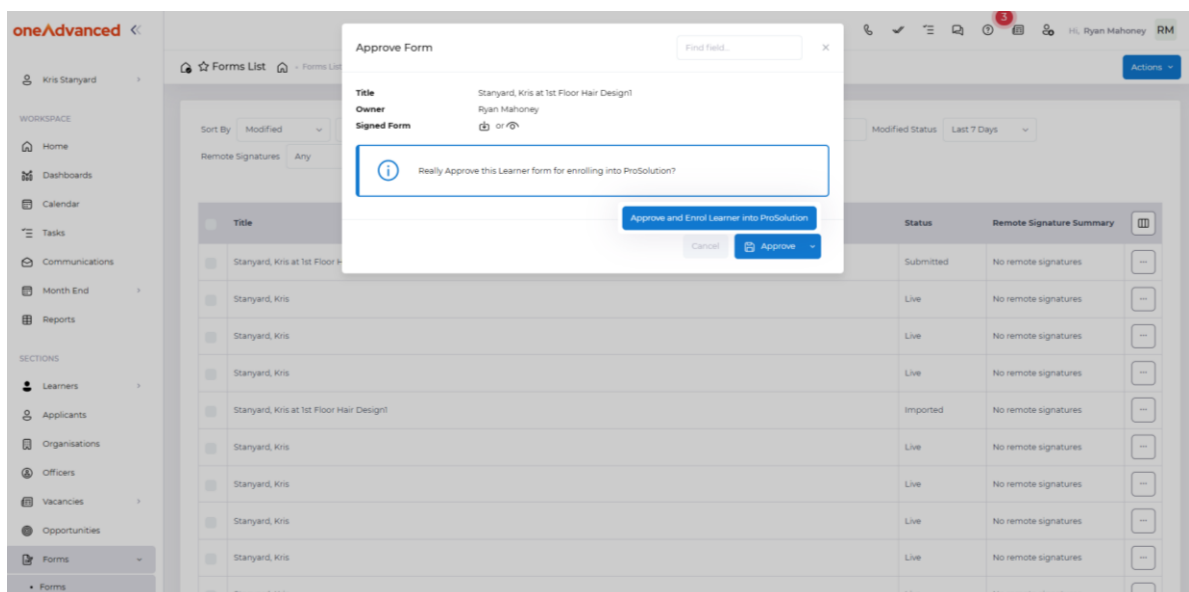
With the form open, remote signatures for Learner, Employer Representative and Form Owner can be set here. Please note that these can be defaulted when the webform is built. [For more information on Webform Configuration please refer to the guidance available here.](#)

Role	Email	Sequence
Employer Representative 1		1
Learner		1
Sign up User	ryanmahoney182@hotmail.com	1

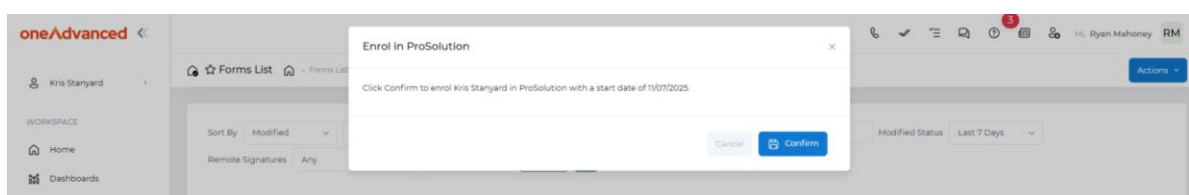
From this point on the form will be completed by the Learner, Employer or Onboarding member of staff. When signatures have been gathered either remotely or within the fill and sign page. The form can then be submitted. Upon submitting the form, it will then be available in the forms list page. Where it can be approved from here, alternatively depending on Webforms config you can set this to automatically approve.



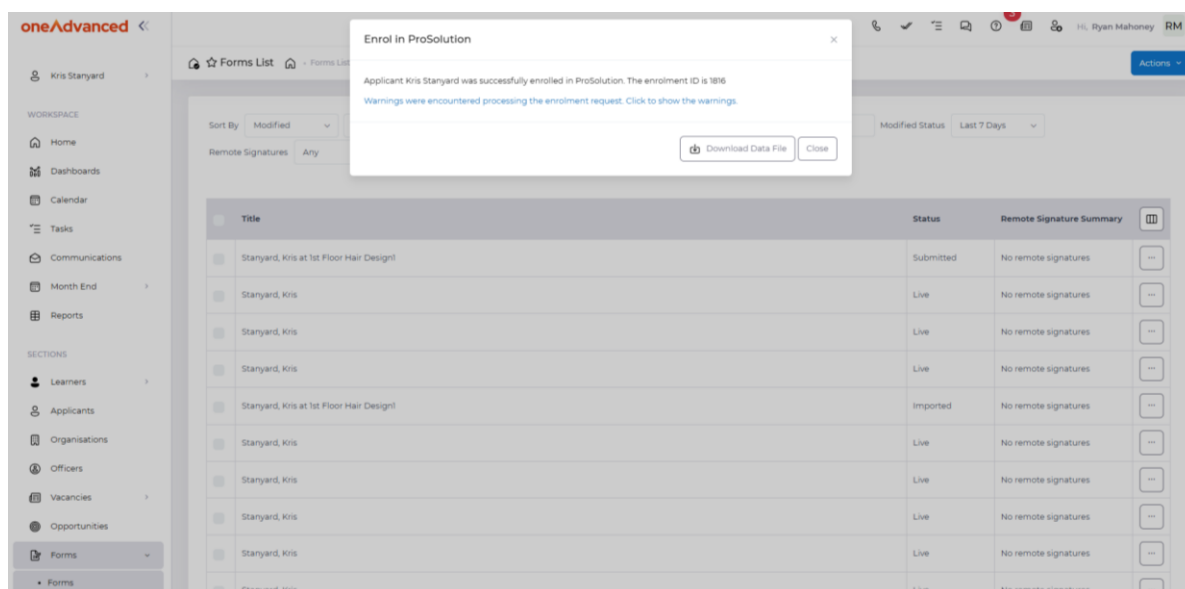
When approving a Webform from the Forms List page, you'll be asked to confirm the approval via the following screen. From here you can review the form by clicking the view icon, or you can download the form by clicking the download icon.



Clicking **Approve and Enrol Learner Into ProSolution** will cause a confirmation window to display, upon confirming, the learner into the Import que where they'll be processed immediately.

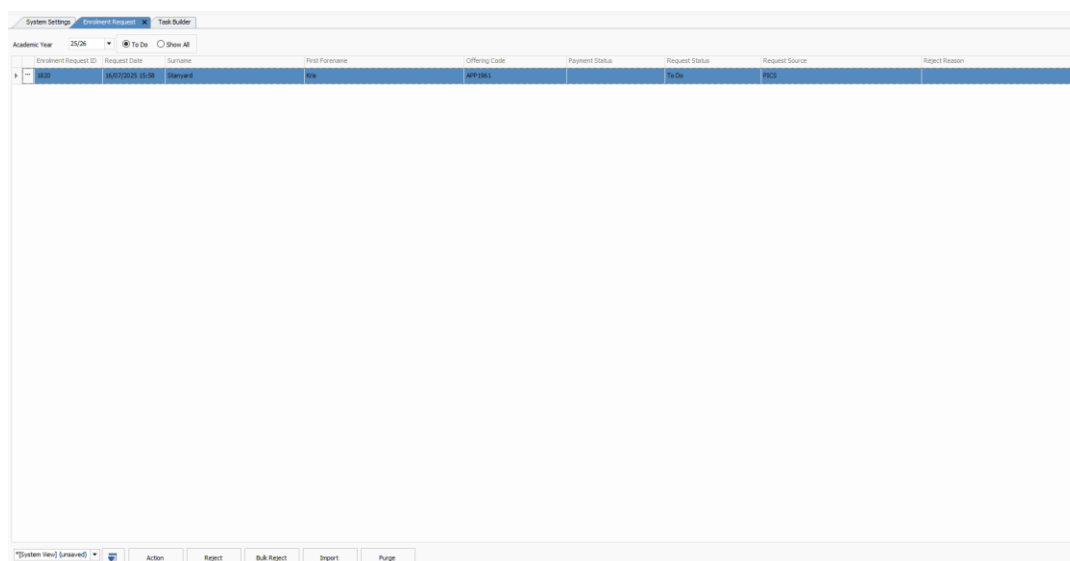


Once the enrolment has been completed, a notification will display within PICS. This will detail the enrolment ID and will include the option to download a copy of the data that has been sent to ProSolution, as well as viewing and warnings or error messages that may have been triggered.



4.5 Processing the Applicant Data in ProSolution

The Applicant data received from PICS will be visible under Enrolment Requests. These requests will be different from the Web Toolkit Enrolment Requests and display a Request Source of PICS.



Action the Enrolment Request in the usual way. Data received from PICS will be pre-populated in the Student and Enrolment Wizard and will be shown in red.

The image displays two screenshots of the oneAdvanced system interface, specifically the 'Student Wizard' window.

Top Screenshot: Search Students

- System Settings** | **Enrolment Request** | **Task Builder** | **Student Wizard**
- Search Students**: Enter criteria to search for a student.
- Academic Year Enrolling to**: 2025
- Search Criteria**:
 - ☒ Student reference number is not known. Search for the student using the following criteria:
 - Surname: [Standard]
 - First Name: [John]
 - Date Of Birth: [01/09/1990] (NOTE: Please Do Not Use Wildcards)
 - ☐ Student reference number is known: Ref No: []
 - ☐ The student has a LUN and has applied/derived at the college before: Unique Learner No: []
 - ☐ UCAS student personal ID is known: UCAS personal ID: []
 - ☐ Scan Education Record QR code: [Image Placeholder]
- Buttons**: Cancel, Back, Next, Finish

Bottom Screenshot: Personal

- System Settings** | **Enrolment Request** | **Task Builder** | **Student Wizard**
- Personal**: Please confirm/enter the student details.
- Personal Details**:
 - UK:**
 - Surname: [Standard] (Red)
 - First Forename: [John] (Red)
 - Other Forenames: []
 - Known As (Name): []
 - Surname At Birth: [Family Name] (Red)
 - Local Destination: [05 - (05) Continuing Existing Programs] (Red)
 - Do you have any...: []
 - Ref No:** []
 - Date Of Birth:** [01/09/1990] (Red)
 - Place Of Birth:** []
 - Sex:** [M] (Red)
 - Ethnic Group:** [05 - English / White / Scottish /] (Red)
 - NI:** [398J53238] (Red)
 - UCI Ref:** []
 - BLC Ref No:** []
- Home Address**:
 - No 10 Street: [19 Shindale Drive] (Red)
 - City/Town: [Warrington] (Red)
 - Country: [Warrington] (Red)
 - Postcode: [CV33 0BL] (Red)
 - Tel 1: [02475045678] (Red)
 - Tel 2: []
 - Contact Details: [] Email: []
- Term Address (if different)**:
 - No 10 Street: []
 - City/Town: []
 - Country: []
 - Postcode: []
 - Tel 1: []
 - Tel 2: []
 - Postcode On Arrival: [CV33 0BL] (Red)
 - Alt Type: []
- Tutor ID:** [] **Staff:** []
- Tutor Group:** [] **Enter Contact Information?** ☒
- Buttons**: Home, UK, Cancel, Back, Next, Finish

The Parent Offering ID associated with the Course selected in the Qual Plan and the associated Child Offering IDs will be pre-populated in the Enrolments step.

Code	Offering Name	Type	Start Date	Qual	Enrol	Status
APP2061	Apprenticeship Standard - Business Administration Level 3	APP STANDARD	01/08/2025	29020001	☒	Can Enrol
APP2061-A	Non-regulated provision, Level 3, Business Management	APPRENTICESHIP COMPONENT	06/07/2025	29006166	☒	Can Enrol
APP2061-E	Functional Skills Qualification in English L2	APPRENTICESHIP COMPONENT	06/07/2025	60346462	☒	Can Enrol
APP2061-M	Functional Skills Qualification in Maths L2	APPRENTICESHIP COMPONENT	06/07/2025	60335333	☒	Can Enrol

At the bottom are 'Cancel', '< Back', 'Next >', and 'Finish' buttons.

The enrolment wizard will loop around each of the Child Offerings passed through via the Applicant data to allow any additional information to be captured.

Once processed, the student will be visible in the Student tab for the appropriate Academic Year.

Academic Year	Student	Student Enrolments	Student Employment	Student Outcome
2021/22	Stanford	Yes		

At the bottom are 'New/Find', 'Online', and a status bar showing 'System View: Unsaved'.

5. Recommendations

The following recommendations should be followed to ensure that data transferred as part of the MIS (ProSolution) LMS (PICS) integration is successful:

5.1 Fields Used in the Applicant Data Transfer

The following fields are populated from PICS into the ProSolution Enrolment Request. It is recommended that these fields are included in the PICS web forms.

ProSolution Field	PICS Webform Field
OfferingID	PROSOLUTION_OFFERING_ID (Included in Webform Data)
Address1	Address line 1
Address2	Address line 2
Address3	Address line 3
Address4	Address line 4
DateOfBirth	Date of Birth
RestrictedUseAllowContactByPost	Contact Method Field – Post
RestrictedUseAllowContactByTelephone	Contact Method Field – Telephone
RestricteduseAllowContactByEmail	Contact Method Field – Email
CanBeContactedBySMS	Contact Method Field – SMS/Text
CountryID	LRS Birthplace
HasEducationHealthCarePlan	ILR Education Health Care Plan (EHC)
Email	Email
EthnicGroupID	ILR Ethnicity

ProSolution Field	PICS Webform Field
FirstForename	Forename
OtherForenames	Forename
LearningDiffOrDisID	ILR Disability (Self Assessed)
Sex	ILR Sex
SurnameAtBirth	LRS Family Name at 16
AbilityToShareID	LRS Privacy Notice Seen
UniqueLearnerno	LRS ULN
VerificationTypeID	LRS Identity Verification Type
MobileTel	Mobile Number
NI	Ni Number
Contact1EmailAddress	Next of Kin Email
Contact1	Next of Kin Name
Contact1Tel	Next of Kin Telephone
Contact1MobileTel	Next of Kin Telephone 2
Tel	
PICSApplicantID	This data is included as part of the Payload to ProSolution.
PostcodeOut+' '+PostcodeIn	Postcode
KnownAs	LRS Preferred Name
EmploymentStatusBeforeID	Prior to Start Employment Status Code
PriorAttainmentLevelID	ILR Prior Attainment

ProSolution Field	PICS Webform Field
ExpectedEndDate	Episode Expected End Date
StartDate	Episode Start Date
Surname	Surname
ApprenticeshipContractTypeID	Contract Code
TargetOTJHours	Off-the-job training hours
ESFDossierID	
EndPointAssessmentOrganisationID	Endpoint Assessment Organisation
AmountTNP1	Employer Training Price
AmountTNP2	Employer Assessment Price
DisabilityCategoryID	Multiple LLDD Category
IsPrimary	Primary LLDD Category
PICSOrganisationID	Organisation Ident (included in payload)
EmploymentStatusID	Prior to Start Employment Status Code
BenefitStatusIndicatorID	Prior to Start Employment Status - Benefit Status Indicator (BSI)
EmploymentIntensityID	Changed on or after Start Employment Status - Employment Intensity (EI)
LengthOfEmploymentID	Prior to Start Employment Status - Length of Employment (LOE)
LengthOfUnemploymentID	Prior to Start Employment Status - Length of Unemployment (LOU)
OtherEmploymentType1ID	Prior to Start Employment Status - Other Employment Tracking (OET1)

ProSolution Field	PICS Webform Field
OtherEmploymentType2ID	Prior to Start Employment Status - Other Employment Tracking (OET2)
OtherEmploymentType3ID	Prior to Start Employment Status - Other Employment Tracking (OET3)
PreviouslyInFTEducation	Prior to Start Employment Status - Previous Education Indicator (PEI)
IsSelfEmployed	Changed on or after Start Employment Status - Self Employment Indicator (SEI)
IsEligibleForSmallEmployerFunding	Prior to Start Employment Status - Small Employer (SEM)
DateAwarded	Prior Qualification Achievement Date 1 - 10
Grade	Prior Qualification Grade 1-10
QualID	Not Utilised in Webforms, Quals listed against the applicant Prior Qualification will
OfferingID	Included in Webform Payload
StartDate	Aim Start 1
ExpectedEndDate	Aim Expected End 1
MajorFundingSourceID	Programme Aim ACT
ApprenticeshipContractTypeID	Contract Code
DeliveryPostcodeOut	Delivery Location Postcode (First 4 characters are used)
DeliveryPostcodeIn	Delivery Location Postcode (Last 3 characters are used)
ProportionFundingRemaining	Funding Proportion

ProSolution Field	PICS Webform Field
FranchisingPartnerID	Subcontractor
ACLProvisionTypeID	Tailored Learning Purpose (ACL FAM)
AFLProvisionTypeID	Community Learning which is Family learning (AFL FAM)

5.2 Sites

Sites in PICSWeb allow you to create a hierarchy of sites to represent different regions, offices and partners. Records in PICSWeb can then be limited to certain sites, meaning that only staff members with the associated site permissions can access the relevant data. Sites can also be widely used in reporting, both for selection and output.

Selecting **Users and Access > Sites** from the **Configuration** section of the side menu will open the Site List page. This page displays a list of sites and options to create and edit them. Depending on your setup, the sites page and menu link might be under a different label, such as offices or regions.

For more information on Sites please refer to the following Guidance:

[Creating a New Site in PICSWeb - PICS Online Help - Confluence](#)

[Editing Sites in PICSWeb - PICS Online Help - Confluence](#)

5.3 Qual Plans

A **Qualification Plan** can be used to attach certain qualifications and other elements to a [New Applicant](#) by default. As well as this, various ILR fields can be completed by default when a qualification plan is chosen. A robust qualification plan setup in your PICS LMS configuration will ensure that your data entry is efficient and consistent across your learner records.

Selecting **... > Edit** by a qualification plan in the [Qualification Plan List](#), or selecting **Actions > Edit** in a [Qualification Plan Summary](#), will open a window where you can edit the following details. Once you have made your changes, select **Save** to keep them or **Cancel** to discard them.

- Description
- Status – Here you can control whether the plan is **Live** or **Dormant**. Dormant plans will not be available to link to any new learners or applicants.
- For Applicants – Tick this box to make the plan available for [Applicants](#).
- Programme Type – Here you can choose which programme will be applied to learners on the plan.
- ILR Apprenticeship Standard
- Standard EPA Organisation – Here you can use the drop-down menu to choose the [Organisation](#) that will be used as the End Point Assessment (EPA) organisation for the programme.
- Age Checks – Here you can choose whether to restrict the plan for only learners or applicants of a certain age. This field controls whether their age is checked at the **Start** of their programme or whether the necessary age is reached **In Year**. The **Min** and **Max** fields below are used to specify the allowed age range.

- Training Adviser – Here you can use the drop-down menu to choose the [Officer](#) that will be used as the training adviser for the programme.
- Employer – Here you can use the drop-down menu to choose the [Organisation](#) that will be used as the employer for the programme.
- Funding Organisation and Group/Subgroup
- Generic Title – Here you can specify a shorter generic title to describe the plan.
- Approval Date

5.4 Prior Qualifications

The **Prior Qualifications** tab in the [Applicant Summary](#) shows any prior qualifications that have been linked to the applicant. For each qualification, the following details are shown:

- Achieved date
- Title
- Level
- Grade

If you have **Database Administrator** permissions, you can maintain the prior qualification list in the [Prior Qualifications](#) section of PICSWeb configuration.

Recent Activity	Programme	Additional Forms	Financial Details	Officers
Organisations	Offers	Provisions	Prior Qualifications	Files
Notes	Tasks	Communications	Calendar	Courses
Applications	Survey Responses			

100 Records ▾	More ▾		Actions ▾
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Achieved	Title	Level	Grade	
25/06/2021	Maths	GCSE	4	
25/06/2021	English	GCSE	5	

Viewing the Applicant PLR

If you have obtained the applicant ULN from the LRS in the [Programme](#) tab, a button will be available in the **Actions** menu to view the applicant's PLR. You can use this to verify any previous qualifications achieved by the applicant.

Filtering the Prior Qualification List

The option to filter the prior qualification list by **Number of Records** is available from above the list. Once you have entered the necessary details, press **Enter** or select the **Search** icon to run the search and apply your filters.

Exporting the Prior Qualification List

Selecting **More** shows an option to **Export to Excel**. Selecting this will generate an Excel Spreadsheet containing the details currently displayed in the list.

Adding a New Prior Qualification

Selecting **(Actions >) Add Prior Qualification** in the prior qualifications tab will open a window where you can link a new prior qualification to the applicant. You can enter the following details for the qualification:

- Title
- Achieved date – Selecting this field will open a calendar date selector.
- Level
- Grade

Select **Save** to add the prior qualification or **Cancel** to discard it.

Add Prior Qualification
×

Title	Certificate in Customer Service ▼
Achieved	📅
Level	[blank] ▼
Grade	[blank] ▼

Cancel

Save

Editing Prior Qualifications

Selecting **... > Edit** by a prior qualification in the list will open a window where you can edit various details. A **Find Field** search bar is available at the top-right to search for a field. As you enter text, the list of fields will update automatically. The following fields are available:

- Title

- Achieved date – Selecting this field will open a calendar date selector.
- Qualification – You can use the drop-down menu to choose from the available qualifications. A search bar is available at the top of the menu.
- Level
- Grade
- Certification Status
- Verified type
- Verified Date – Selecting this field will open a calendar date selector.
- Proxy Type
- Proportion
- Expires date – Selecting this field will open a calendar date selector.
- Proxy Notes
- Relaxation For

If you require Prior Qualifications Aim references to be included in the enrolment data sent over to ProSolution. We recommend that you add prior qualifications to the applicant data. This can be done in the User Interface against the applicant record by accessing the Prior Qualification tab and entering the data accordingly.

Alternatively, this data can be collected at the point of application, via the sign-up form.

For more information on creating sign up forms, please refer to the following guidance:

[Creating Sign up form in PICS LMS](#)

[Editing Sign up forms in PICS LMS](#)

6. Document Control

Version History

Date	Version	Issued by	Changes
28/07/2025	1	Laura Coles & Ryan Mahoney	Initial Version
08/08/2025	1.1	Laura Coles & Ryan Mahoney	Updated MyWorkplace guidance
14/01/2026	1.2	Laura Coles & Ryan Mahoney	Updated PICS URL (PSOL) to exclude API string
14/01/2026	1.3	Laura Coles & Ryan Mahoney	Updated ProSolution PICS system settings with fixed values
19/05/2026	1.4	Laura Coles	Removes ProAPI and created separate guide. Updated flow of document

Document Review History

Version	Name	Title/Organisation

Document Approval

Date	Version	Name	Title/Organisation	Approval record

Document Hierarchy

Parent Document	Name	Location
Child Document(s)	Name	Location

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