



VETtrak AcademyPlus

Enhancing Your VT Admin Experience (Part 2)

Using date-driven data tools

VETtrak. Number 1 in RTO

Welcome to VETtrak AcademyPlus!

This session is specially designed for your learning experience, based on your feedback.

We will be covering the subject through a series of modular sections that focus on unique date-driven features within VETtrak, such as Events and Holidays, providing opportunities for questions throughout.

Let's collaborate and learn together.



This session will cover:

1. Welcome back to the **Configuration Manager**!
2. **What are Holidays?**
3. How do they work?
4. Adding custom Holidays / Running the Holiday Report
5. **What are Events?**
6. Creating/Using Event Types
7. Assigning Events
8. **What is the Calendar?**
9. Navigating the Calendar
10. Creating Calendar Output
11. Additional Resources





Item:

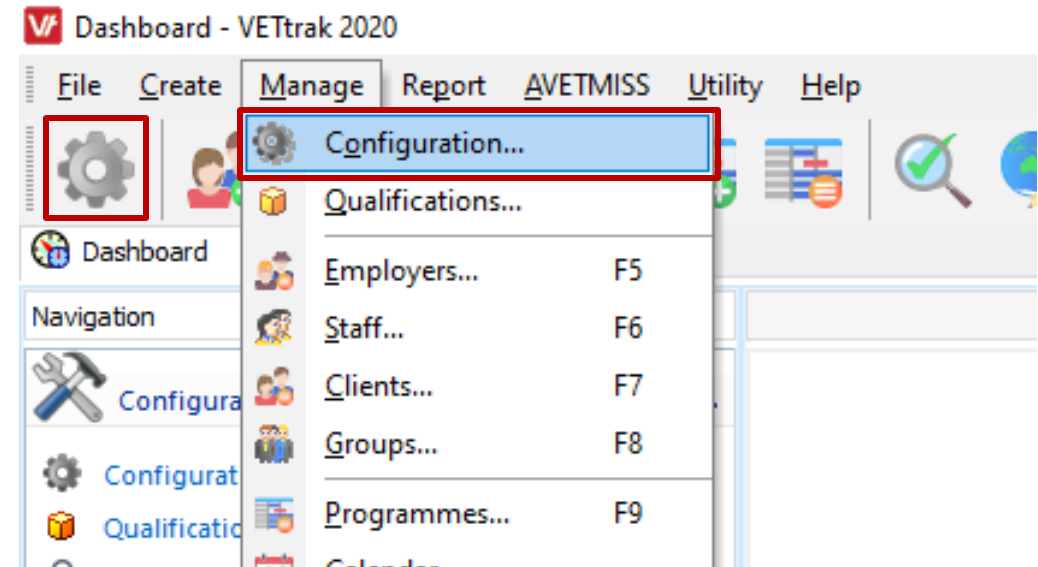
Welcome back to

The Configuration Manager!

The Configuration Manager

The **VETtrak** Configuration Manager is a unique manager of **VETtrak** containing many back-end data entry options, as well as configurations tools for optional features.

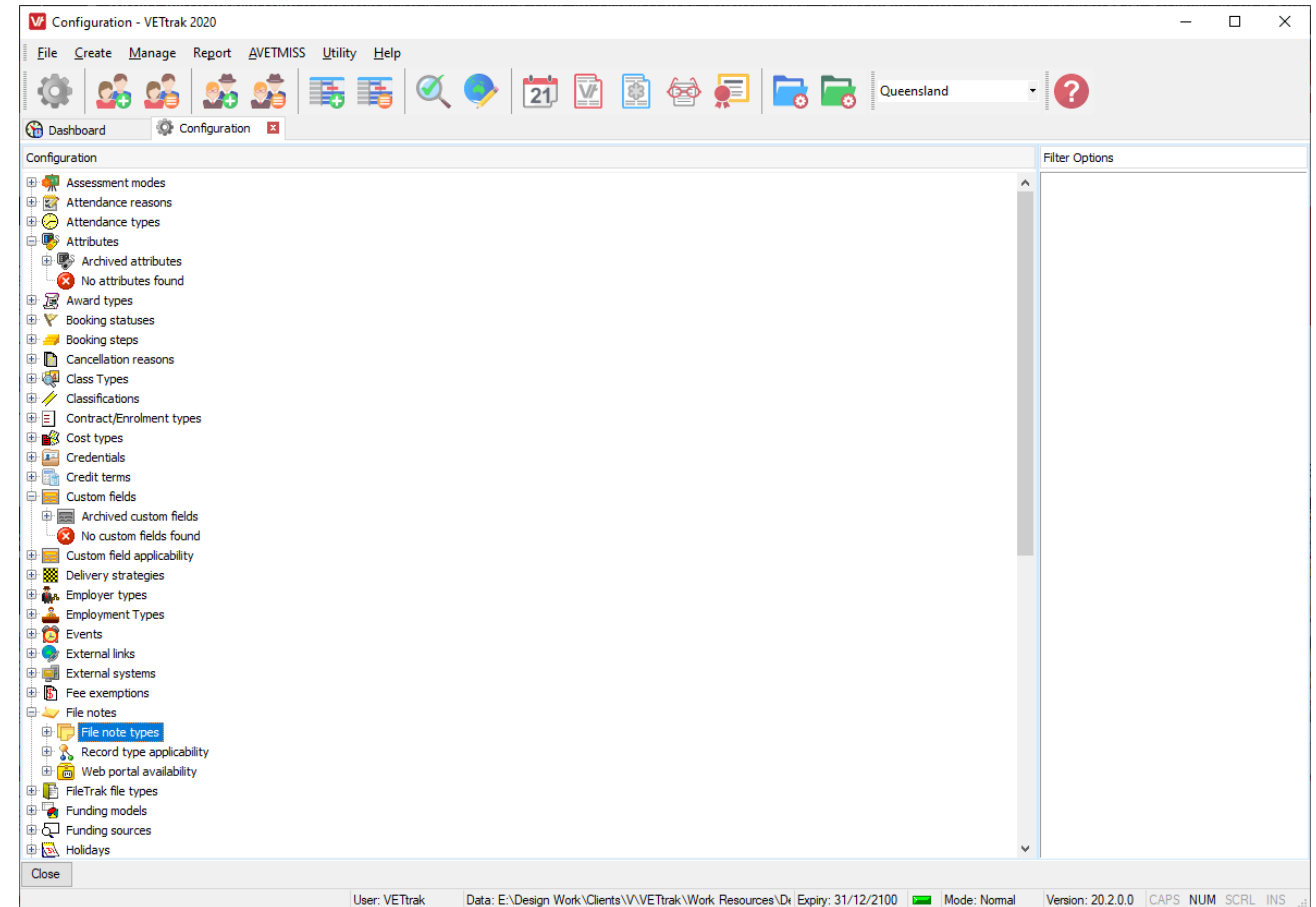
You can access the Config Manager at any time by pressing the **Cog** icon, either on the **Quick-Launch** bar or under the **Manage** menu.



Enhancing Your VT Admin Experience



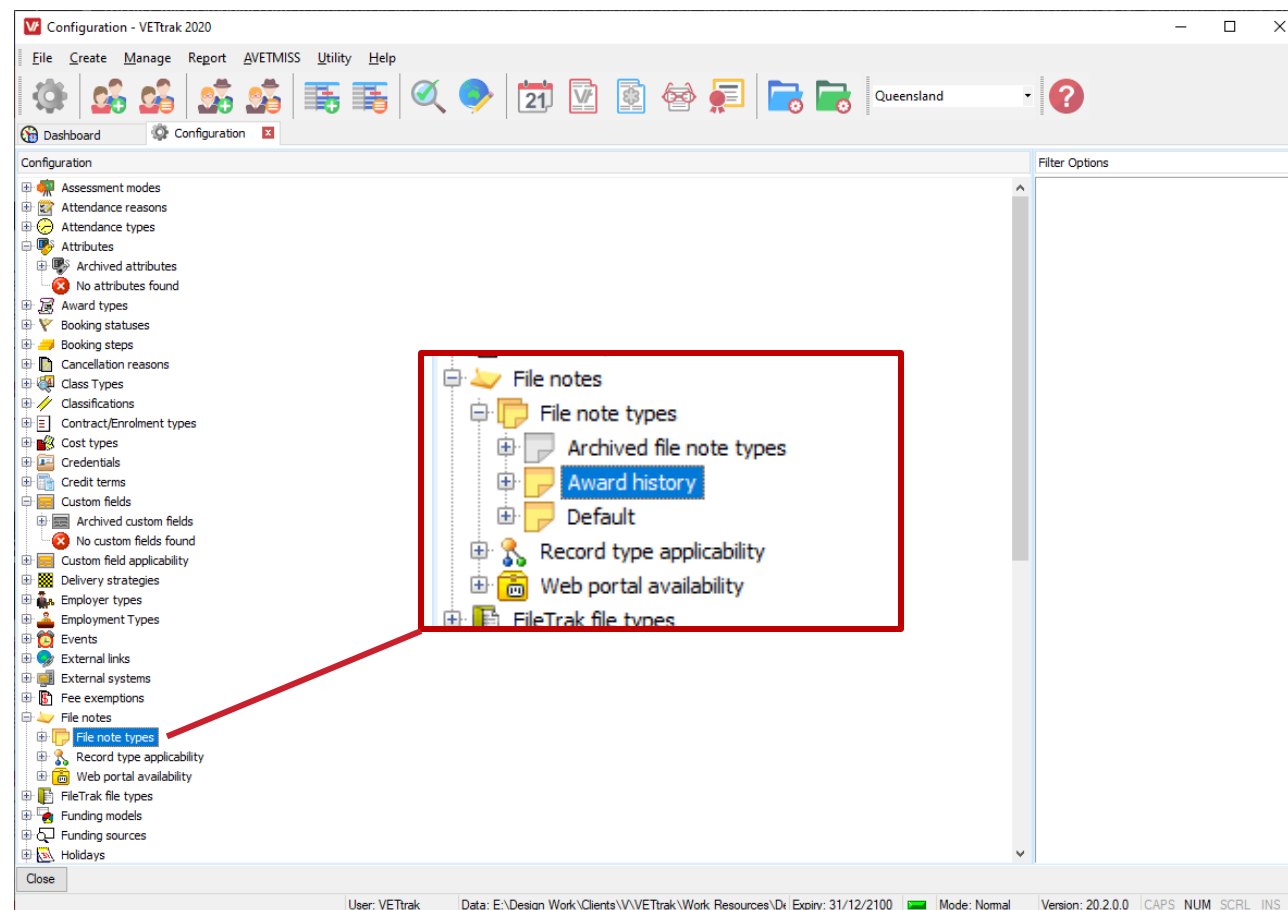
The manager itself is displayed as a long list of headings, presented in alphabetical order.



Enhancing Your VT Admin Experience



Each heading can be expanded to see further details on the data type it belongs to:



Enhancing Your VT Admin Experience

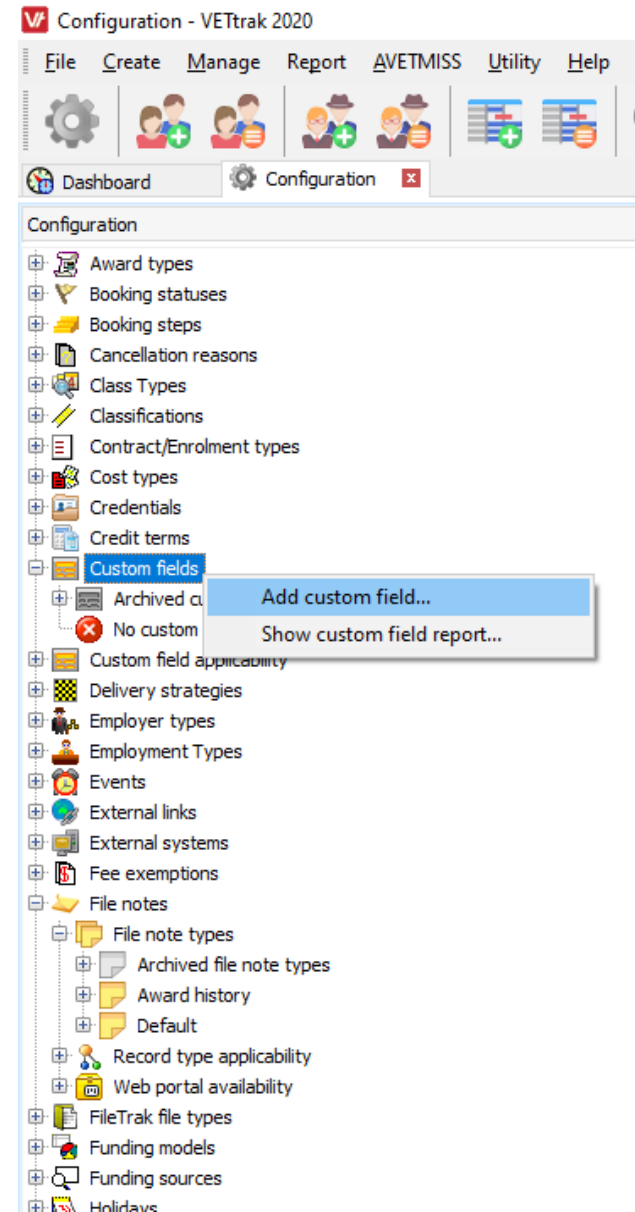


How does it work?

Managing items in this area can be done almost entirely by **right-clicking** or **expanding** a heading to view the options available.

In this way you can view existing data or create new items.

The management of different items in this area can vary from heading to heading – However! All of these items have been documented on our **VETtrak Help Centre!**



Item:
What are
Holidays?

A red rectangular sign with the word 'CLOSED' in large, bold, black capital letters. The sign is held in place by two clear pushpins at the top. A thin horizontal line is visible below the word.

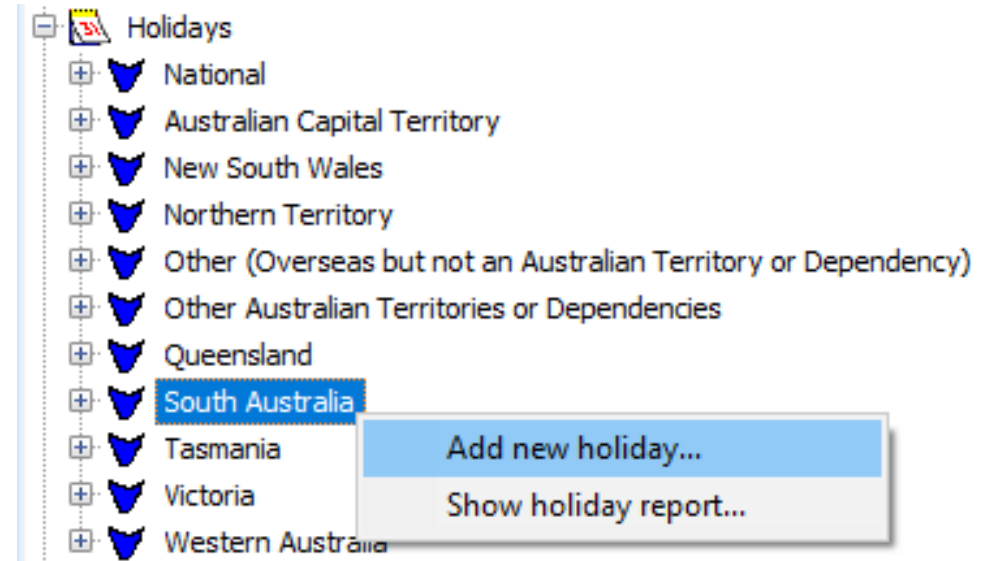
CLOSED

Holidays

(Public) Holidays are a unique data type within VETtrak, suited to enhance your scheduling needs.

They serve to provide a warning if you try to schedule a **Class** or an **Event** on a date that is a considered a **Holiday**.

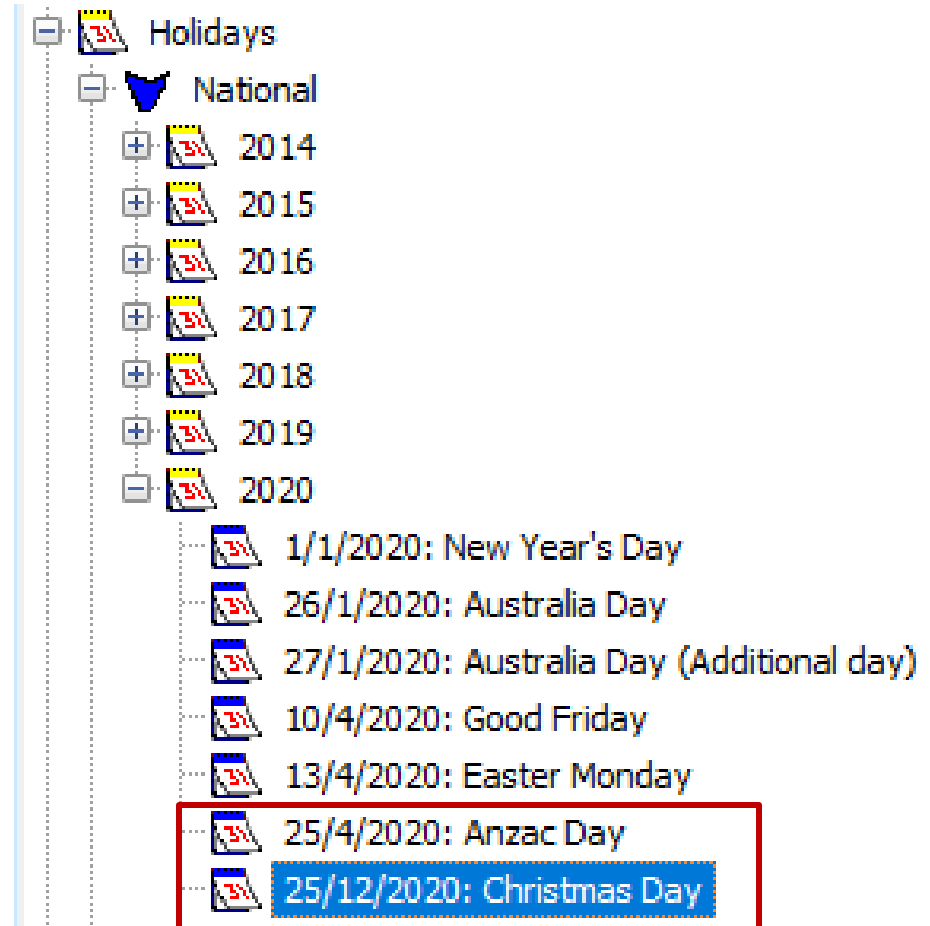
A standard set of public holidays as provided by the government are already provided in VETtrak, but you can remove any that do not apply, or add your own.



Holidays

Holidays can be managed within the **Configuration** manager and are grouped within **State specific** and **National based** headings.

State specific items reflect local public holidays – while the **National items** reflect more broader holidays such as **Anzac Day** or **Christmas Day**.

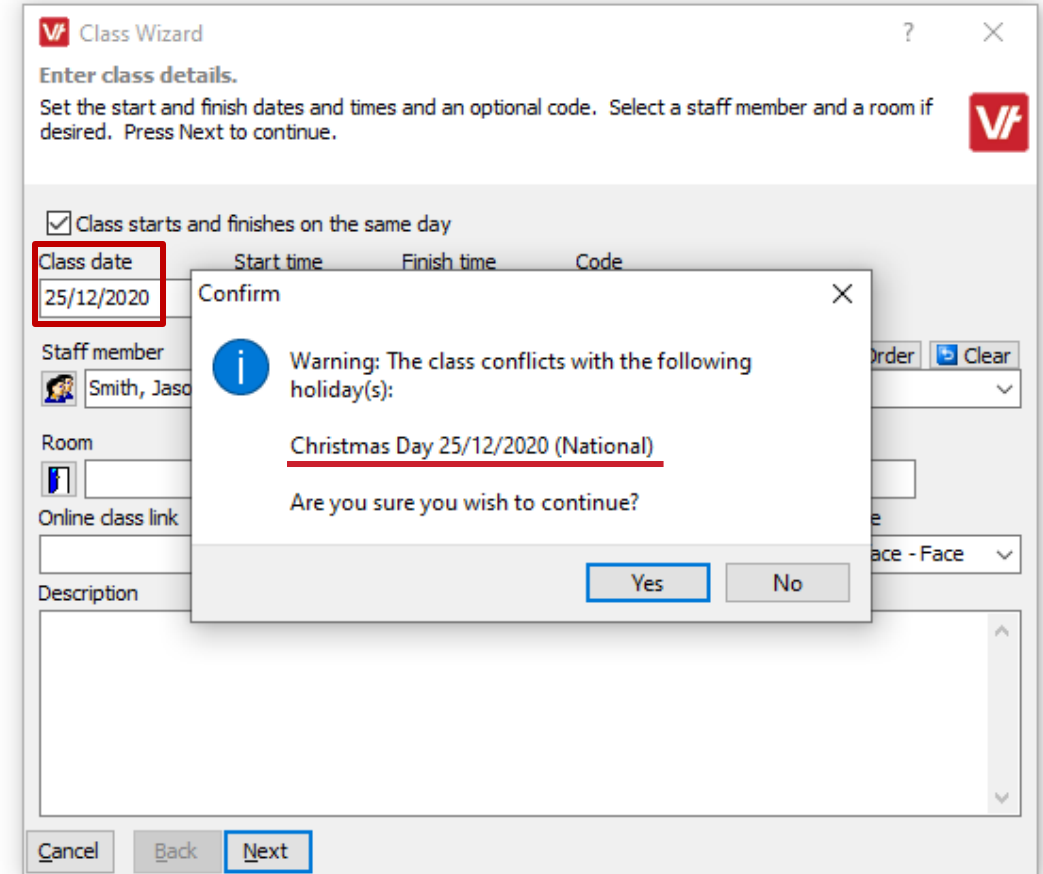


Holidays

The real strength of Holidays is that they will display an alert when you attempt to schedule date-specific data that overlap with a recorded holiday for that location.

This will allow admin staff to ensure they do not accidentally allot classes or events to a day that is considered a holiday.

In the example on the right, we can see the warning displaying that I have attempted to create a class that falls on **Christmas day!**



The screenshot shows the 'Class Wizard' window with the 'Enter class details' section. The 'Class date' field is set to '25/12/2020' and is highlighted with a red box. A 'Confirm' dialog box is overlaid on the main window, displaying a warning: 'Warning: The class conflicts with the following holiday(s): Christmas Day 25/12/2020 (National)'. The dialog asks 'Are you sure you wish to continue?' and has 'Yes' and 'No' buttons. The 'Next' button in the main window is highlighted with a blue box.

Class Wizard

Enter class details.

Set the start and finish dates and times and an optional code. Select a staff member and a room if desired. Press Next to continue.

☒ Class starts and finishes on the same day

Class date: 25/12/2020

Start time: Finish time: Code:

Staff member: Smith, Jason

Room: [Room icon]

Online class link: [Link field]

Description: [Description field]

Confirm

Warning: The class conflicts with the following holiday(s):

Christmas Day 25/12/2020 (National)

Are you sure you wish to continue?

Yes No

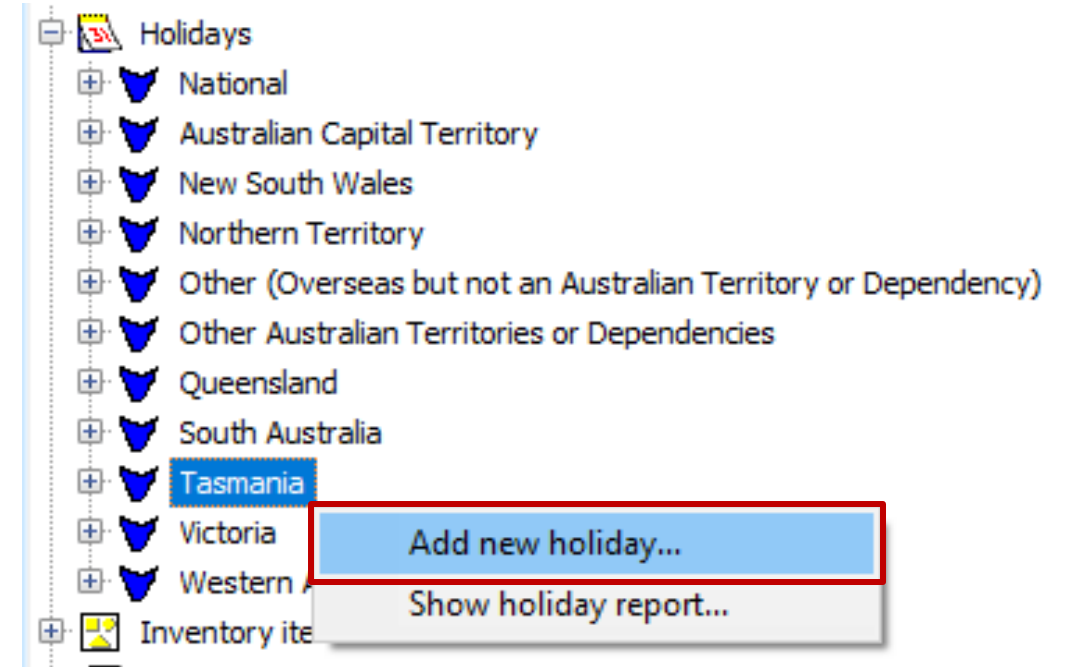
Cancel Back Next

Holidays

There is also the option to **add** your own custom **Holidays** to your VETtrak database.

This can be useful for blocking out specific days that are considered no-work days, such as routine meetings days across your company that require closed doors!

You can do this by **right-clicking** on a particular **Holiday heading** or **Year** heading under the **Holidays** section of the configuration manager, and selecting **Add new holiday**:

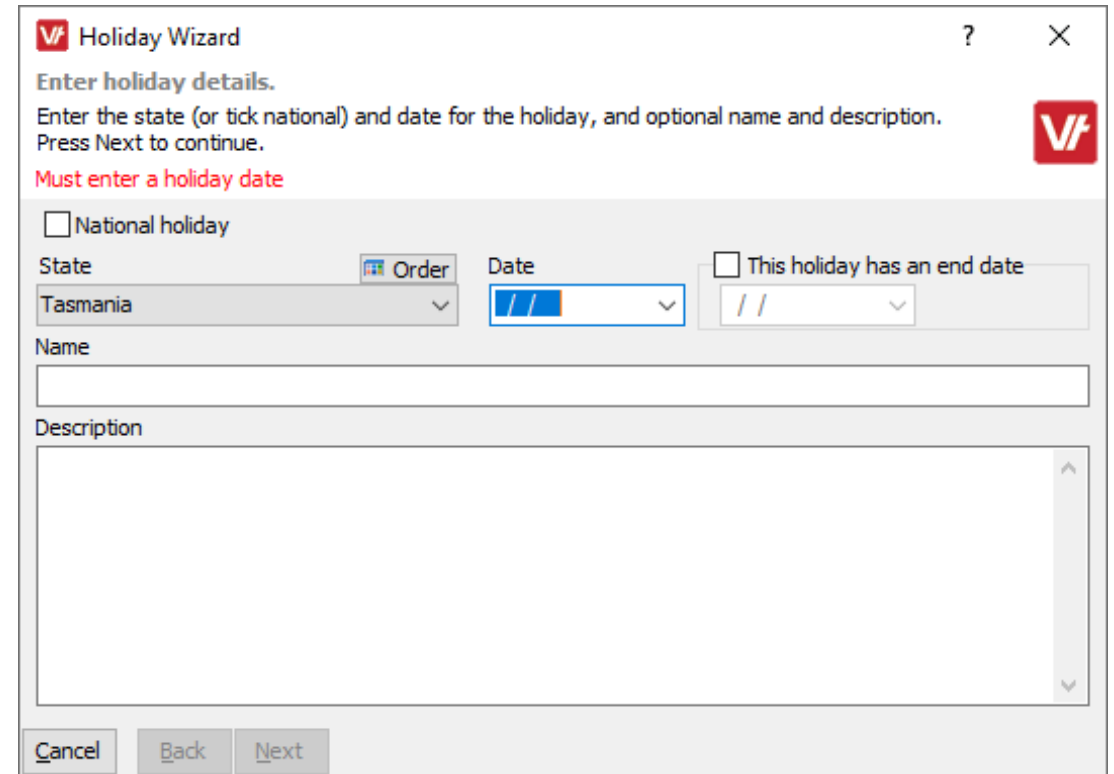


Holidays

This will open the **Holiday** wizard!

Within this area, you can configure if the holiday is considered to be **Nationally** relevant, meaning it will display across any state or territory when data-relevant date is entered.

You can of course add the **Date** for the holiday, and if it has a multiple day duration you can optionally select an **End Date**.



The screenshot shows the 'VF Holiday Wizard' dialog box. It has a title bar with the VF logo, a question mark, and a close button. The main content area is titled 'Enter holiday details.' and includes instructions: 'Enter the state (or tick national) and date for the holiday, and optional name and description. Press Next to continue.' A red error message 'Must enter a holiday date' is displayed. The form contains several fields: a checkbox for 'National holiday', a 'State' dropdown menu currently showing 'Tasmania' with an 'Order' button next to it, a 'Date' dropdown menu showing '//' with a blue highlight, and a checkbox for 'This holiday has an end date' with an 'End Date' dropdown menu also showing '//'. Below these are text input fields for 'Name' and 'Description'. At the bottom are 'Cancel', 'Back', and 'Next' buttons.

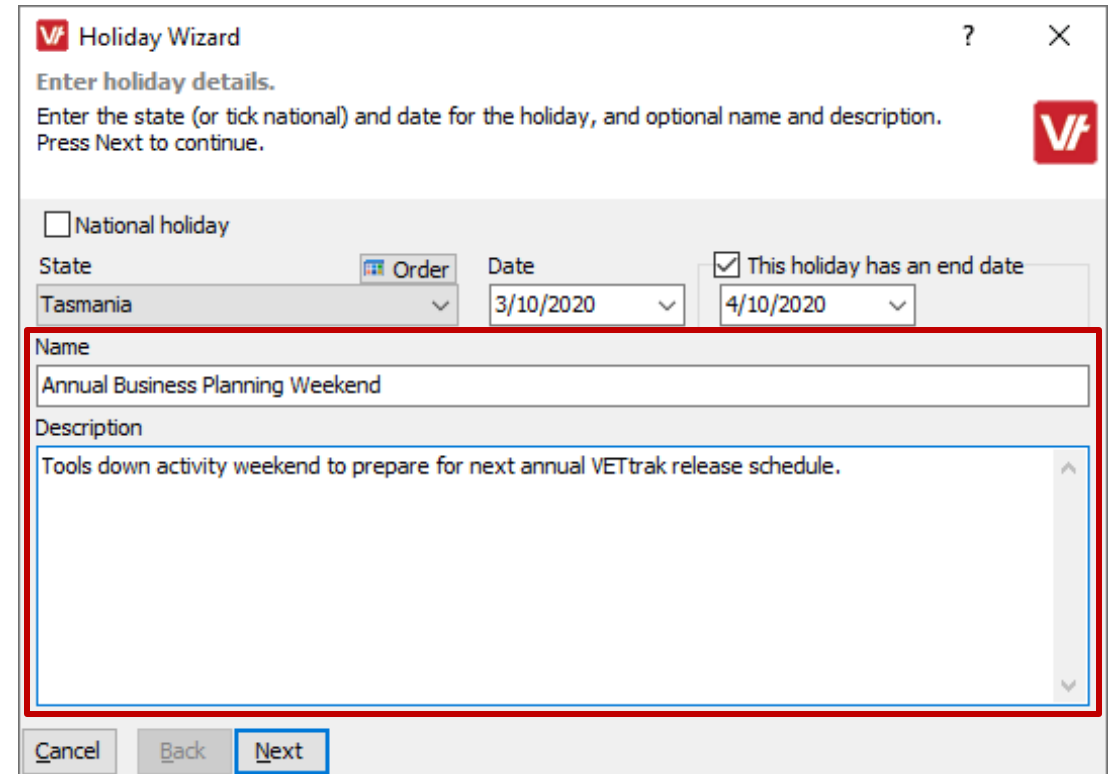
Holidays

This will open the **Holiday** wizard!

Within this area, you can configure where the holiday is considered to be **Nationally** relevant, meaning it will display across any state or territory when data-relevant date is entered.

You can of course add the **Date** for the holiday, and if it has a multiple day duration you can optionally select an **End Date**.

Enter a **Name** for your holiday item, and optionally enter a **Description** if you wish!



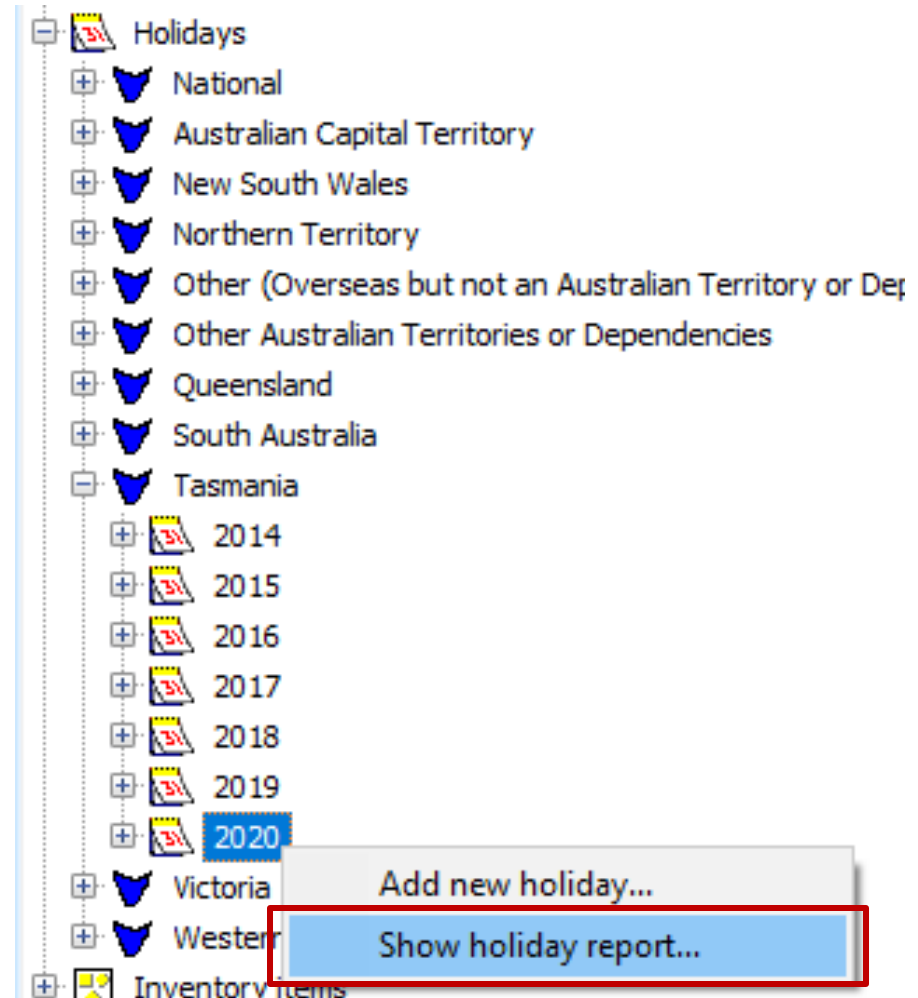
The screenshot shows the 'VF Holiday Wizard' window. It has a title bar with the VF logo, a question mark, and a close button. The main content area is titled 'Enter holiday details.' and includes instructions: 'Enter the state (or tick national) and date for the holiday, and optional name and description. Press Next to continue.' Below this, there is a checkbox for 'National holiday'. To the right of this checkbox is a small VF logo. Below the checkbox, there are three fields: 'State' (a dropdown menu with 'Tasmania' selected), 'Date' (a dropdown menu with '3/10/2020' selected), and 'This holiday has an end date' (a checkbox that is checked, followed by a dropdown menu with '4/10/2020' selected). Below these fields, there is a 'Name' field with the text 'Annual Business Planning Weekend' and a 'Description' field with the text 'Tools down activity weekend to prepare for next annual VETtrak release schedule.' At the bottom of the window, there are three buttons: 'Cancel', 'Back', and 'Next'.

Holidays

It can also be useful to see a list of your holidays – and perhaps even export it for others to views.

This can be handy for admin staff that may wish to get across what days they should avoid when scheduling items – and saves them being surprised when the alert window pops up unexpectedly!

To do this, right click on a Holiday heading – whether it's a year, or a state/national option – and select **Show holiday report**:



Holidays

This will display a simple list of the Holidays in a report.

Any custom Holidays will be present and accounted for – and the Holidays that are automatically added to VETtrak as part of your updates will have a description explaining how they are sourced!

Holidays Report

Tasmania holidays			
Date	State	Name	Description
9/3/2020	Tasmania	Eight Hours Day	Always on a Monday, creating a long weekend. It celebrates the eight-hour working day, a victory for workers in the mid-late 19th century. https://worksafe.tas.gov.au/laws/public_holidays
14/4/2020	Tasmania	Easter Tuesday	Public Holiday currently observed by certain awards/agreements and the State Public Service https://worksafe.tas.gov.au/laws/public_holidays
8/6/2020	Tasmania	Queen's Birthday	Celebrated on second Monday in June except in Western Australia and Queensland. https://worksafe.tas.gov.au/laws/public_holidays
3/10/2020	Tasmania	Annual Business Planning Weekend	Tools down activity weekend to prepare for next annual VETtrak release schedule.
28/12/2020	Tasmania	Boxing Day	Boxing Day occurs the day after Christmas. Sydney-to-Hobart yacht race and Boxing Day Test Match (Cricket) start on this day. https://worksafe.tas.gov.au/laws/public_holidays

Count: 5

Let's take a closer look!

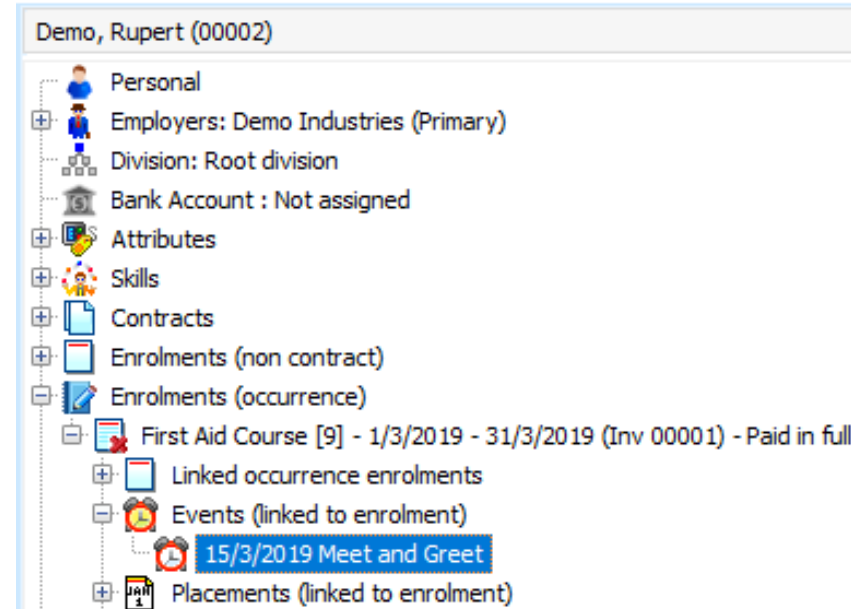
Here is an article that will help get your started with **Holidays**:
[VETtrak Help Centre: Holidays](#)



Item:
What are
Events?

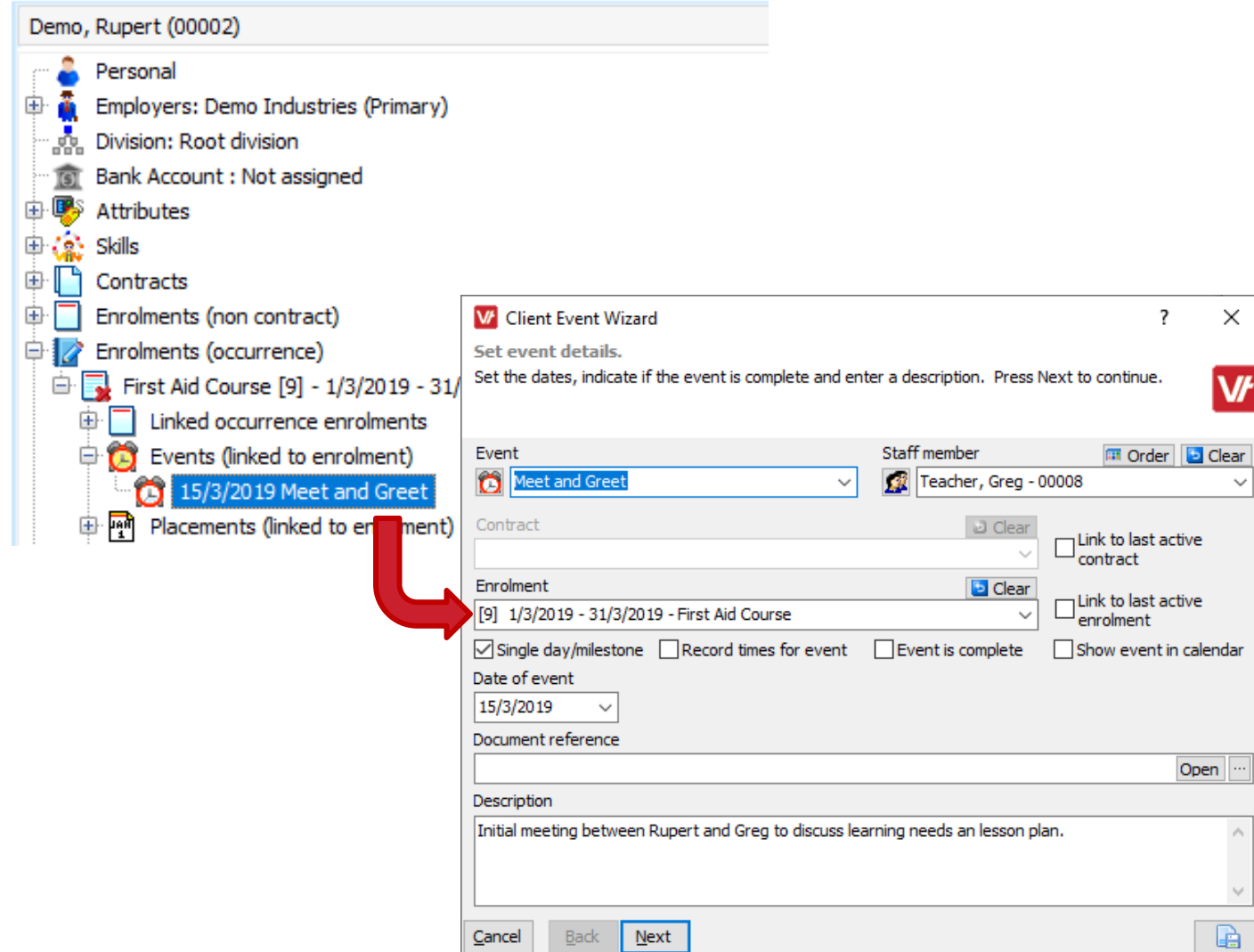
Events

Events are an incredibly versatile data-recording tool within **VETtrak**, designed to track date-relevant information against key **VETtrak** data elements, such as **Clients, Enrolment, Employers, Occurrences** – the list goes on!



Events

Use them to track **milestones**, schedule **meetings**, create **staff-oriented tasks** – it is difficult to explain what Events can be used for, because so many people use them in so many different ways.



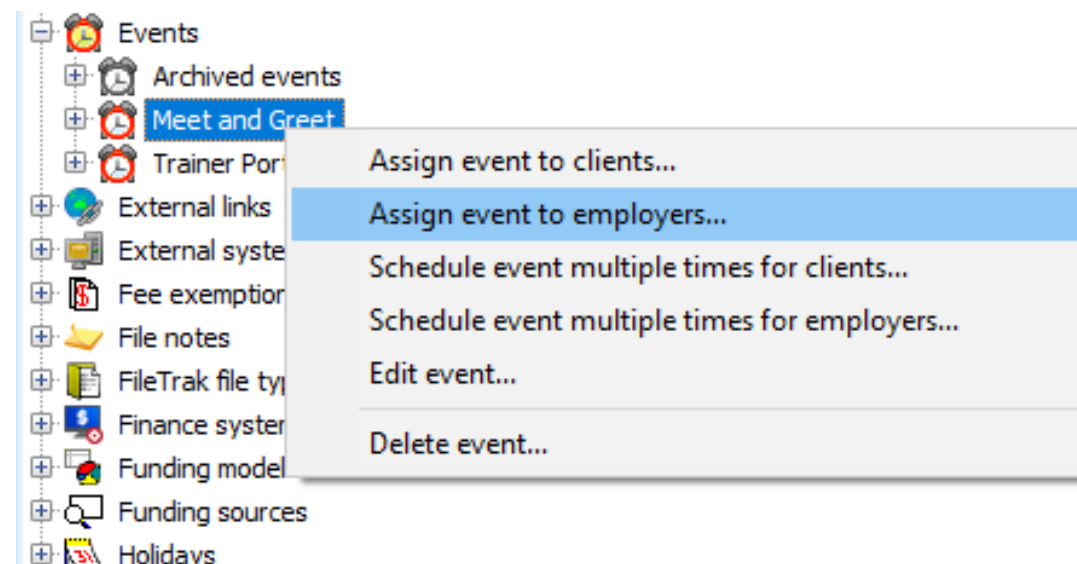
The screenshot displays the VT Admin interface for a user profile named 'Demo, Rupert (00002)'. The left sidebar shows a tree view of the profile's data, including Personal, Employers, Division, Bank Account, Attributes, Skills, Contracts, Enrolments (non contract), Enrolments (occurrence), First Aid Course, Linked occurrence enrolments, Events (linked to enrolment), and Placements. The 'Events (linked to enrolment)' section is expanded, showing a list of events. One event, '15/3/2019 Meet and Greet', is highlighted in blue. A red arrow points from this event to the 'Client Event Wizard' dialog box on the right.

The 'Client Event Wizard' dialog box is titled 'Client Event Wizard' and contains the following fields and options:

- Set event details.** Set the dates, indicate if the event is complete and enter a description. Press Next to continue.
- Event:** A dropdown menu showing 'Meet and Greet'.
- Staff member:** A dropdown menu showing 'Teacher, Greg - 00008'.
- Contract:** A dropdown menu with a 'Clear' button.
- Enrolment:** A dropdown menu showing '[9] 1/3/2019 - 31/3/2019 - First Aid Course' with a 'Clear' button.
- Options:** Four checkboxes: 'Single day/milestone' (checked), 'Record times for event', 'Event is complete', and 'Show event in calendar'.
- Date of event:** A dropdown menu showing '15/3/2019'.
- Document reference:** A text input field with an 'Open' button and a file icon.
- Description:** A text area containing the text 'Initial meeting between Rupert and Greg to discuss learning needs an lesson plan.'
- Buttons:** 'Cancel', 'Back', 'Next', and a file icon button.

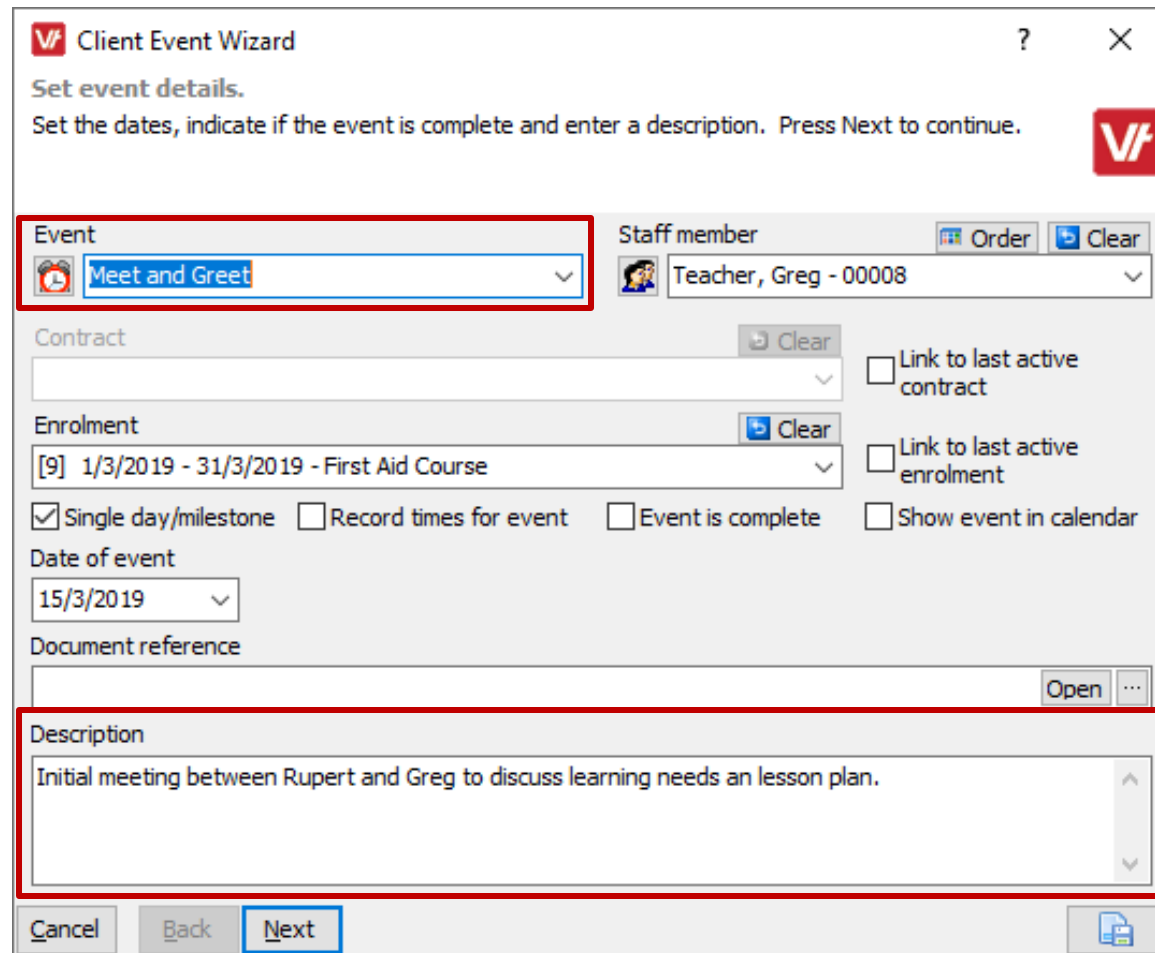
Events

Because **Events** can be attached to many different data-types, it means that you can categorise your Events to represent all manner of scheduled needs.



Events

In this example, We have an **Event** attached to an **Enrolment** to represent **Trainer Contact**!

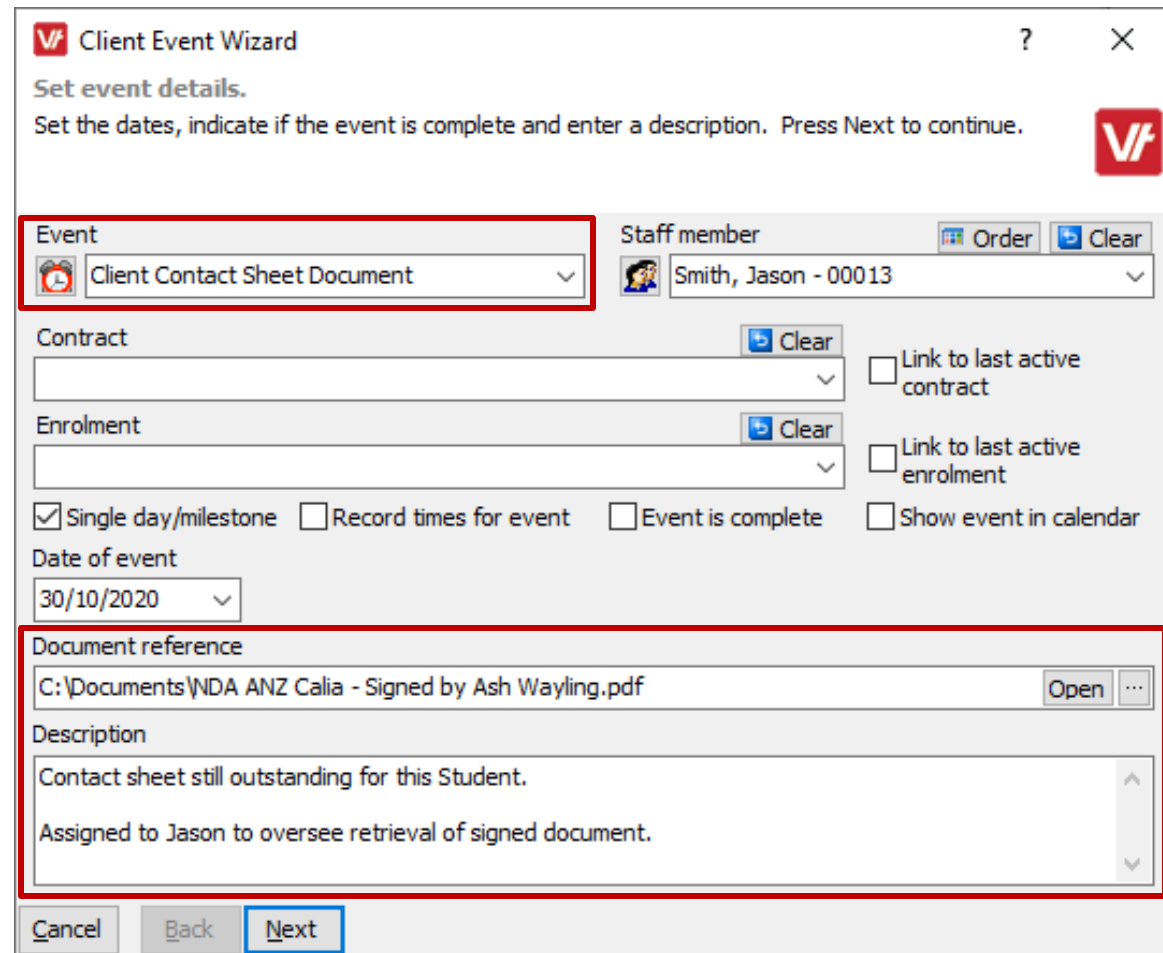


The screenshot shows the 'Client Event Wizard' window with the following fields and options:

- Event:** A dropdown menu with 'Meet and Greet' selected. This field is highlighted with a red box.
- Staff member:** A dropdown menu with 'Teacher, Greg - 00008' selected. It includes 'Order' and 'Clear' buttons.
- Contract:** A dropdown menu with a 'Clear' button.
- Enrolment:** A dropdown menu with '[9] 1/3/2019 - 31/3/2019 - First Aid Course' selected. It includes a 'Clear' button.
- Options:** Four checkboxes: 'Single day/milestone' (checked), 'Record times for event', 'Event is complete', and 'Show event in calendar'.
- Date of event:** A date picker showing '15/3/2019'.
- Document reference:** A text input field with 'Open' and '...' buttons.
- Description:** A text area containing 'Initial meeting between Rupert and Greg to discuss learning needs an lesson plan.' This field is highlighted with a red box.
- Buttons:** 'Cancel', 'Back', 'Next', and a file icon button at the bottom.

Events

In this example, We have an **Event** attached directly to a **Client** to represent a **Paperwork deadline!**



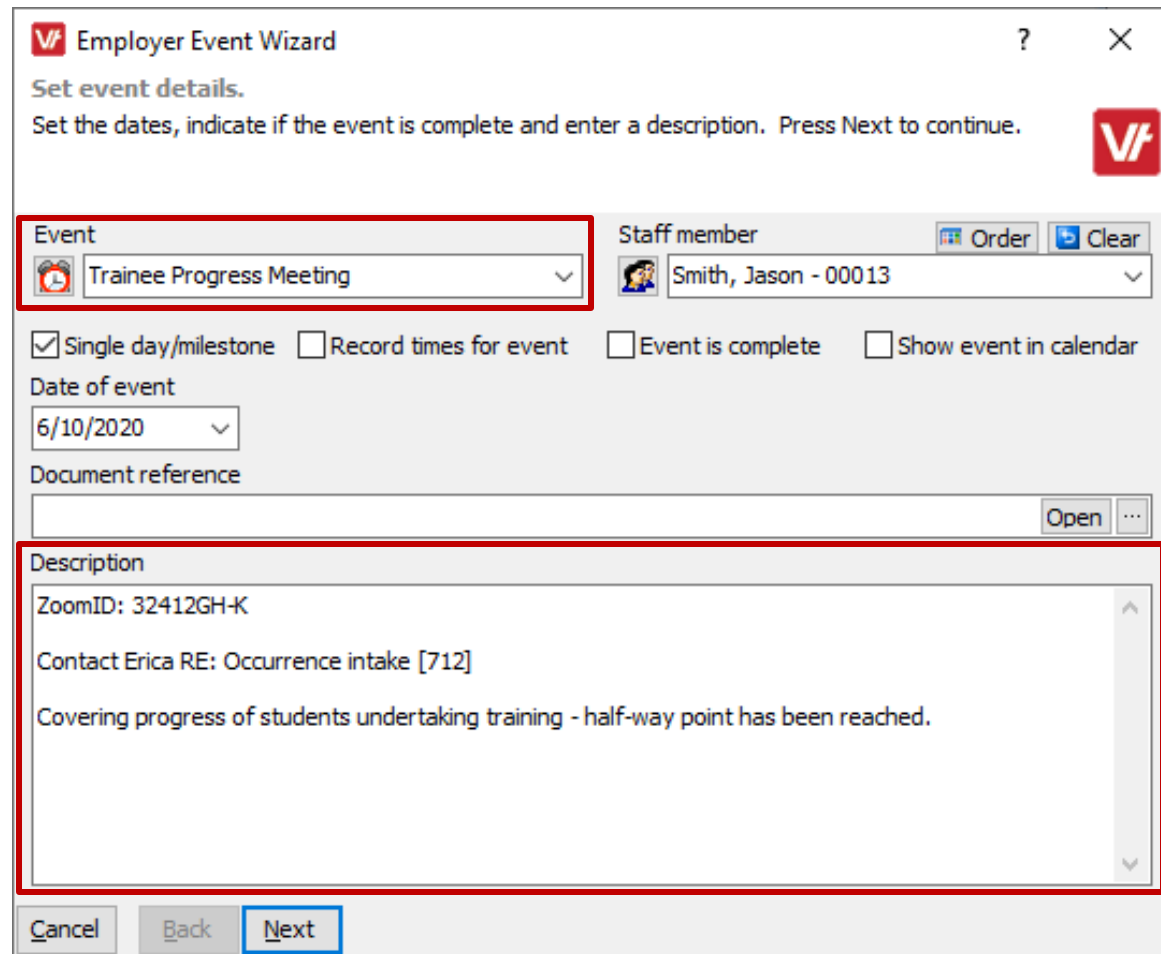
The screenshot shows the 'Client Event Wizard' window with the following details:

- Event:** Client Contact Sheet Document (highlighted with a red box)
- Staff member:** Smith, Jason - 00013 (with 'Order' and 'Clear' buttons)
- Contract:** (empty field with a 'Clear' button)
- Enrolment:** (empty field with a 'Clear' button)
- Checkboxes:**
 - ☒ Single day/milestone
 - ☐ Record times for event
 - ☐ Event is complete
 - ☐ Link to last active contract
 - ☐ Link to last active enrolment
 - ☐ Show event in calendar
- Date of event:** 30/10/2020
- Document reference:** C:\Documents\NDA ANZ Calia - Signed by Ash Wayling.pdf (with 'Open' and '...' buttons)
- Description:** Contact sheet still outstanding for this Student.
Assigned to Jason to oversee retrieval of signed document. (highlighted with a red box)

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

Events

And in this example, we have attached an **Event** to an **Employer** to reflect a **trainee progress update meeting!**



The screenshot shows the 'Employer Event Wizard' window. The 'Event' dropdown is set to 'Trainee Progress Meeting'. The 'Staff member' dropdown is set to 'Smith, Jason - 00013'. The 'Date of event' is '6/10/2020'. The 'Description' field contains the following text: 'ZoomID: 32412GH-K', 'Contact Erica RE: Occurrence intake [712]', and 'Covering progress of students undertaking training - half-way point has been reached.' The 'Next' button is highlighted.

Employer Event Wizard

Set event details.
Set the dates, indicate if the event is complete and enter a description. Press Next to continue.

Event
Trainee Progress Meeting

Staff member
Smith, Jason - 00013

☒ Single day/milestone ☐ Record times for event ☐ Event is complete ☐ Show event in calendar

Date of event
6/10/2020

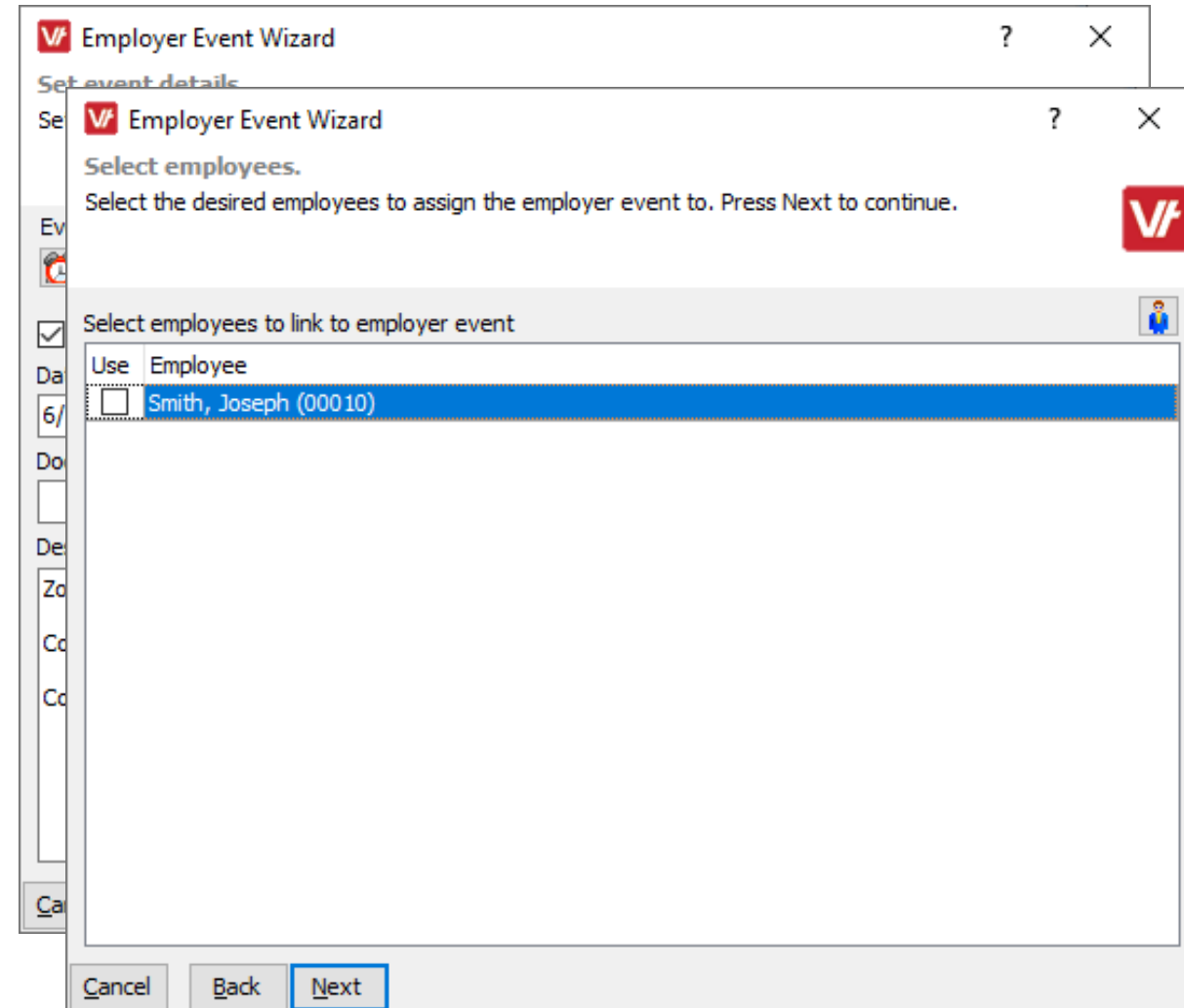
Document reference
Open ...

Description
ZoomID: 32412GH-K
Contact Erica RE: Occurrence intake [712]
Covering progress of students undertaking training - half-way point has been reached.

Cancel Back **Next**

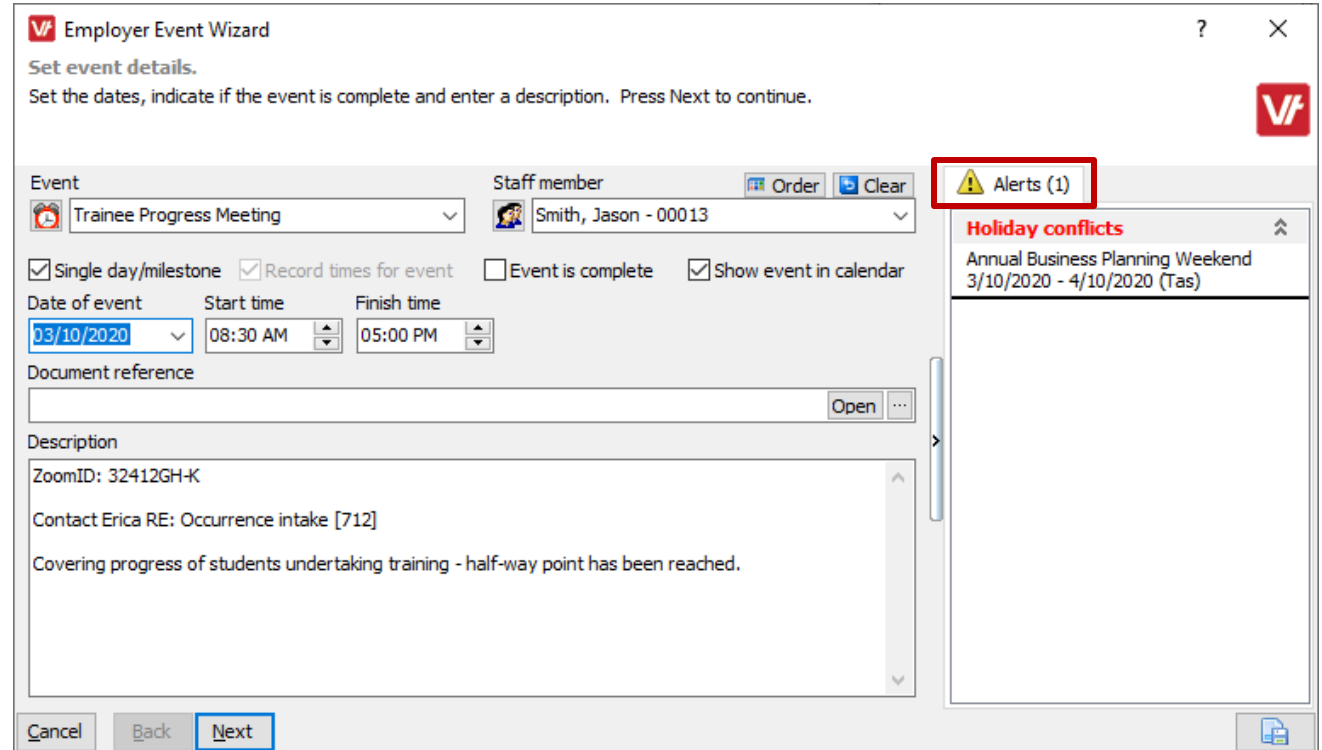
Events

With employer-based events, you can even link the related/relevant employees!



Events

Events also take into account any **Holiday** items that have been configured within your **VETtrak** – displaying an alert when the date specified may intersect with a recorded holiday:



The screenshot displays the 'Employer Event Wizard' window. The 'Event' dropdown is set to 'Trainee Progress Meeting' and the 'Staff member' is 'Smith, Jason - 00013'. The 'Date of event' is '03/10/2020', 'Start time' is '08:30 AM', and 'Finish time' is '05:00 PM'. The 'Description' field contains: 'ZoomID: 32412GH-K', 'Contact Erica RE: Occurrence intake [712]', and 'Covering progress of students undertaking training - half-way point has been reached.' A red box highlights the 'Alerts (1)' icon in the top right corner. Below it, a 'Holiday conflicts' panel shows 'Annual Business Planning Weekend 3/10/2020 - 4/10/2020 (Tas)'.

Employer Event Wizard

Set event details.
Set the dates, indicate if the event is complete and enter a description. Press Next to continue.

Event: Trainee Progress Meeting Staff member: Smith, Jason - 00013

☒ Single day/milestone ☒ Record times for event ☐ Event is complete ☒ Show event in calendar

Date of event: 03/10/2020 Start time: 08:30 AM Finish time: 05:00 PM

Document reference: [Empty field] Open

Description:
ZoomID: 32412GH-K
Contact Erica RE: Occurrence intake [712]
Covering progress of students undertaking training - half-way point has been reached.

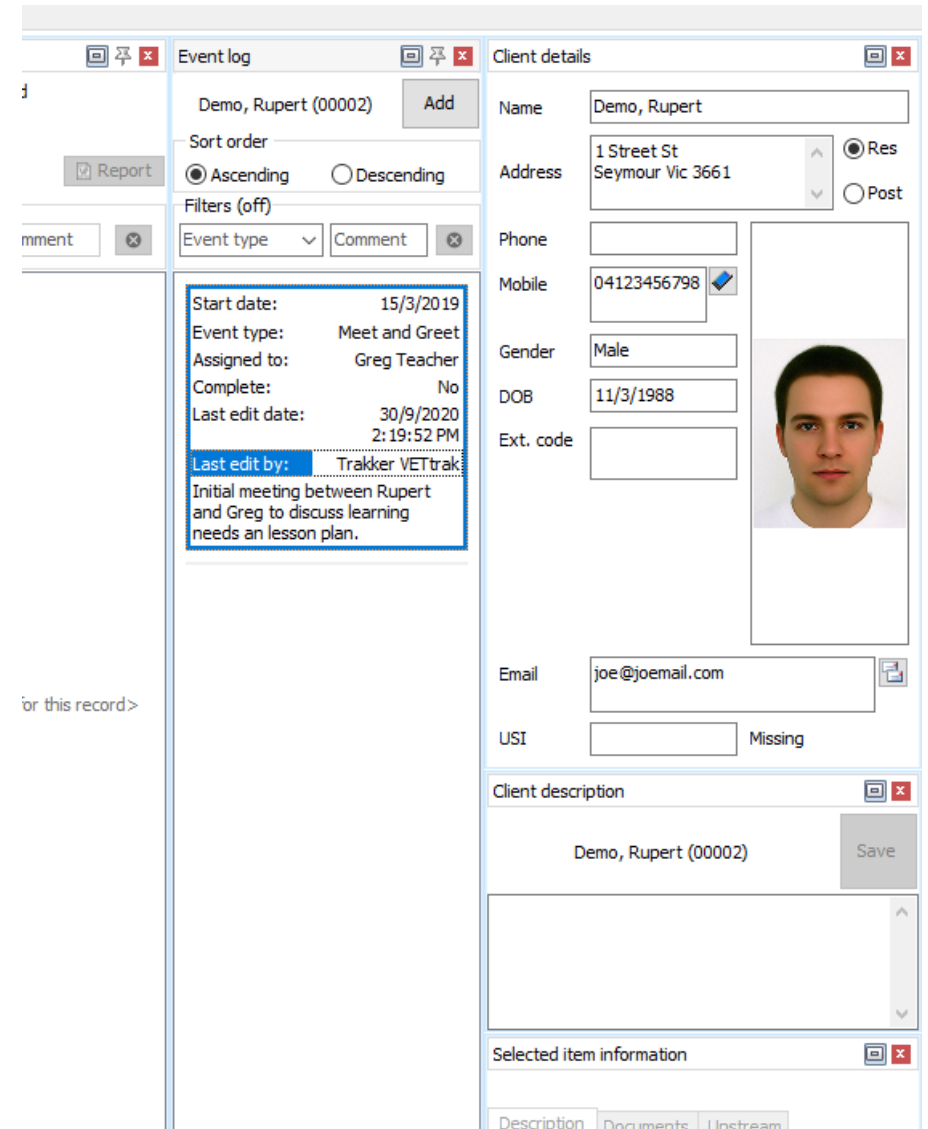
Alerts (1)
Holiday conflicts
Annual Business Planning Weekend
3/10/2020 - 4/10/2020 (Tas)

Cancel Back Next

Events

Events can also appear in their own unique UI area within some Managers. For example, within the **Client** and **Employer** managers, you can view the **Event log**:

This area will display compact summaries of your events, with tools to search and filter for specific event types.

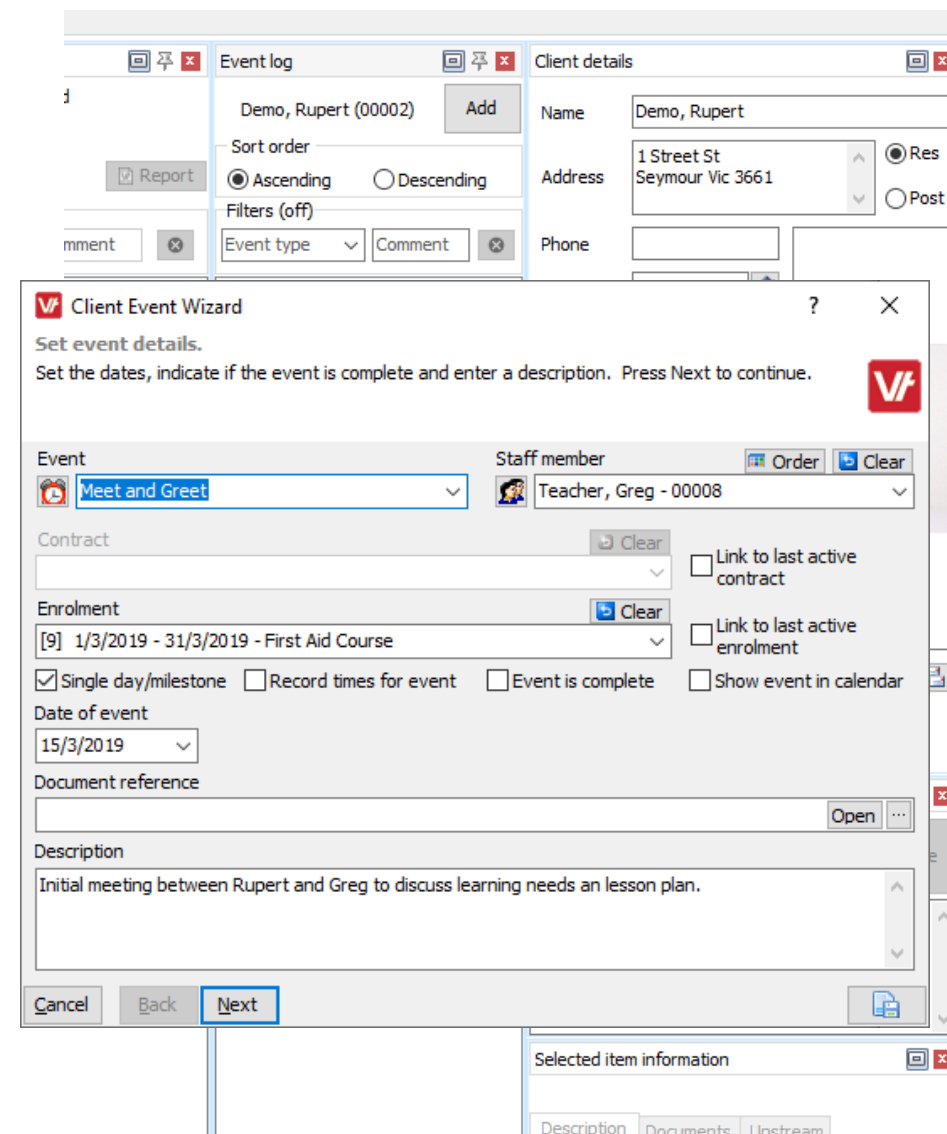


The screenshot displays the VT Admin interface with three main panels:

- Event log:** This panel shows a list of events for 'Demo, Rupert (00002)'. It includes an 'Add' button, a 'Sort order' dropdown (set to 'Ascending'), and a 'Filters (off)' dropdown. A 'Report' button is also visible. The event details shown are:
 - Start date: 15/3/2019
 - Event type: Meet and Greet
 - Assigned to: Greg Teacher
 - Complete: No
 - Last edit date: 30/9/2020 2:19:52 PM
 - Last edit by: Trakker VETtrakA description of the event is provided: 'Initial meeting between Rupert and Greg to discuss learning needs an lesson plan.'
- Client details:** This panel contains personal information for 'Demo, Rupert'. It includes fields for Name, Address (1 Street St Seymour Vic 3661), Phone, Mobile (04123456798), Gender (Male), DOB (11/3/1988), and Ext. code. There is a photo of the client and a 'Res' radio button selected. The email is 'joe@joemail.com' and the USI is 'Missing'.
- Client description:** This panel shows the client's name 'Demo, Rupert (00002)' and a 'Save' button.

Events

Double-clicking an event in this area will open the **Event Wizard**, allowing you easy access to edit the events details!



The screenshot displays the VT Admin interface with the 'Event Wizard' dialog box open. The background shows the 'Event log' and 'Client details' sections. The 'Event log' section includes a table with columns for 'Event type' and 'Comment', and buttons for 'Add', 'Sort order' (Ascending/Descending), and 'Filters (off)'. The 'Client details' section shows fields for 'Name', 'Address', 'Phone', and 'Res/Post' status.

The 'Event Wizard' dialog box is titled 'Client Event Wizard' and contains the following fields and options:

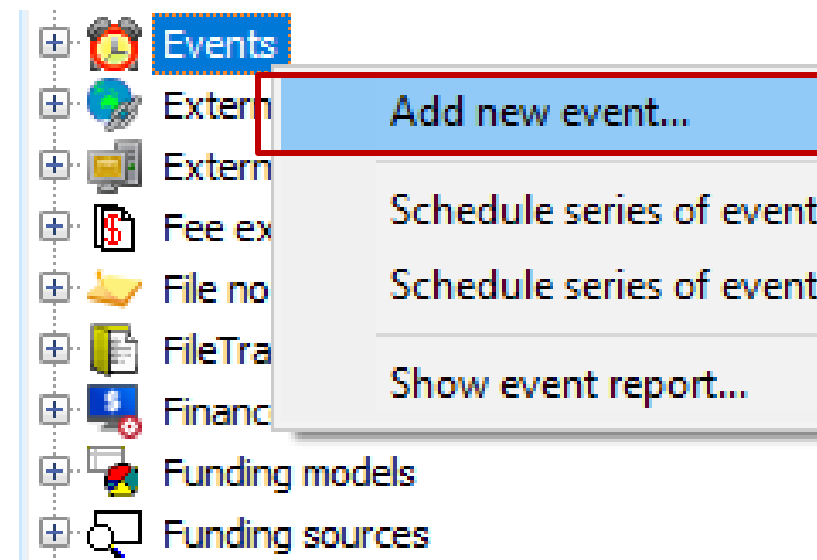
- Event:** A dropdown menu with 'Meet and Greet' selected.
- Staff member:** A dropdown menu with 'Teacher, Greg - 00008' selected.
- Contract:** A dropdown menu with a 'Clear' button.
- Enrolment:** A dropdown menu with '[9] 1/3/2019 - 31/3/2019 - First Aid Course' selected and a 'Clear' button.
- Options:** Four checkboxes: 'Single day/milestone' (checked), 'Record times for event', 'Event is complete', and 'Show event in calendar'.
- Date of event:** A date picker showing '15/3/2019'.
- Document reference:** A text field with an 'Open' button.
- Description:** A text area containing 'Initial meeting between Rupert and Greg to discuss learning needs an lesson plan.'
- Buttons:** 'Cancel', 'Back', and 'Next' buttons at the bottom.

The 'Next' button is highlighted with a blue border. At the bottom right, there is a 'Selected item information' section with tabs for 'Description', 'Documents', and 'Upstream'.

Events

You can add new types of Events to your VETtrak database within the **Configuration manager**.

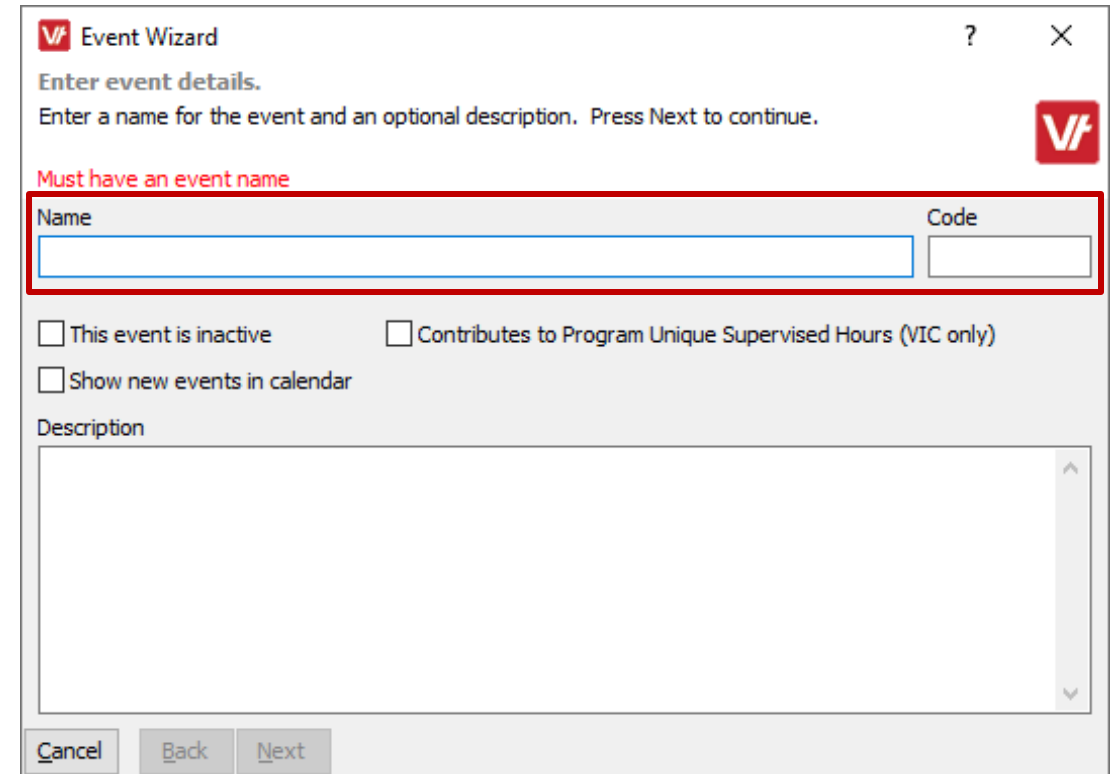
You can do this by **right-clicking** on the **Events** heading within the configuration manager, and selecting **Add new event**:



Events

This will open the **Event** wizard!

Within the area you can designate a **Name** and **Code** for your new event and configure some unique additional options.

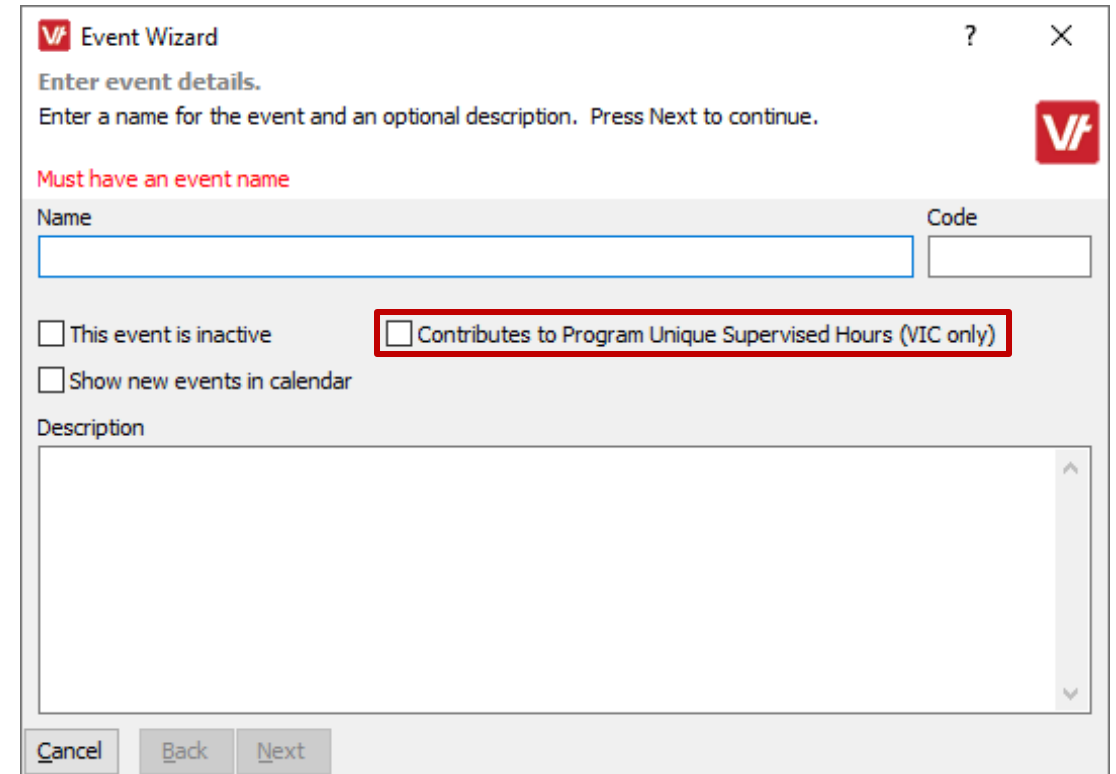


The screenshot shows the 'Event Wizard' dialog box with the following elements:

- Title Bar:** 'Event Wizard' with a question mark and close button.
- Instructions:** 'Enter event details. Enter a name for the event and an optional description. Press Next to continue.'
- Validation:** A red error message 'Must have an event name' is displayed above the Name field.
- Fields:** A 'Name' text box and a 'Code' text box, both highlighted with a red border.
- Options:** Three checkboxes: 'This event is inactive', 'Contributes to Program Unique Supervised Hours (VIC only)', and 'Show new events in calendar'.
- Description:** A large text area for entering the event description.
- Buttons:** 'Cancel', 'Back', and 'Next' buttons at the bottom.

Events

- **Contribute to Program Unique Supervised Hours** is a Victorian specific option, if you require to track (and report) the time period of this event to the state government.



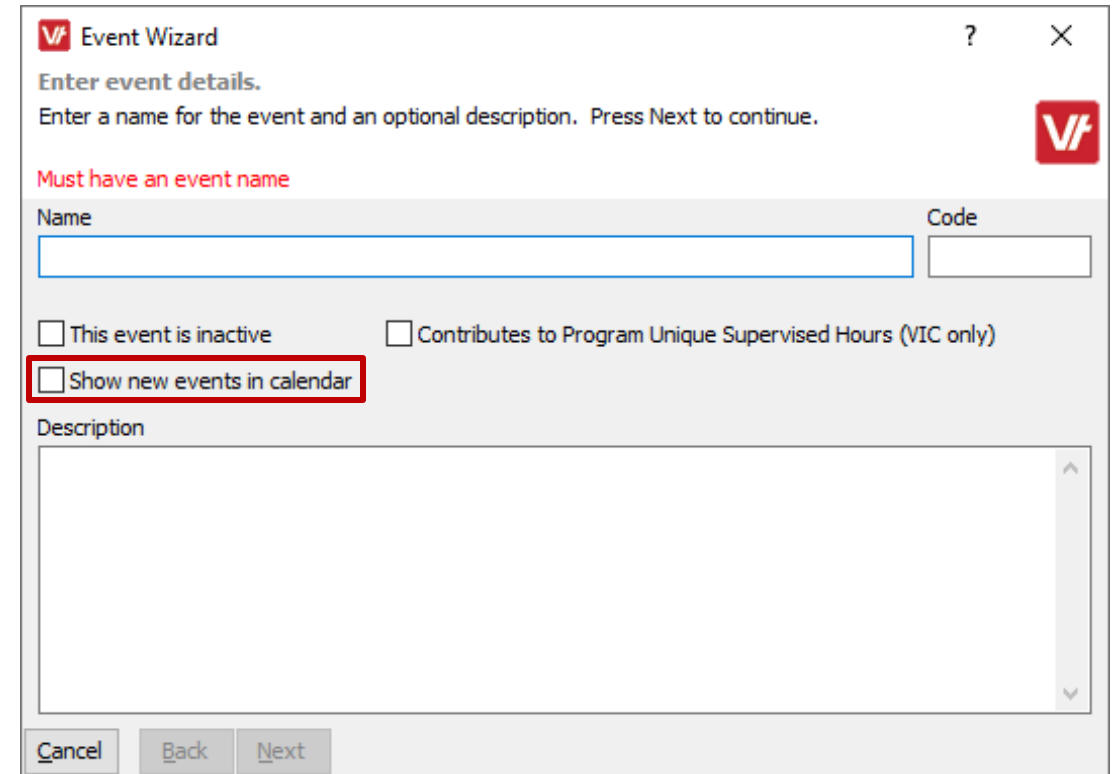
The screenshot shows the 'Event Wizard' window with the following elements:

- Title Bar:** 'Event Wizard' with a question mark and close button.
- Instructions:** 'Enter event details. Enter a name for the event and an optional description. Press Next to continue.'
- Validation:** A red error message 'Must have an event name' is displayed.
- Form Fields:**
 - Name:** A text input field with a blue border.
 - Code:** A text input field.
- Options:**
 - ☐ This event is inactive
 - ☐ Show new events in calendar
 - ☐ Contributes to Program Unique Supervised Hours (VIC only) - This checkbox is highlighted with a red border.
- Description:** A large text area for entering details.
- Buttons:** 'Cancel', 'Back', and 'Next' buttons at the bottom.

Events

- **Show new events in calendar** is a default options to populate events of this type in your VETtrak calendar.

(We will cover using the calendar later in this presentation)



The screenshot shows the 'Event Wizard' dialog box with the following elements:

- Title Bar:** 'Event Wizard' with a red VT logo, a help icon (?), and a close icon (X).
- Instructions:** 'Enter event details. Enter a name for the event and an optional description. Press Next to continue.' with a red VT logo on the right.
- Validation:** A red error message 'Must have an event name' is displayed above the Name field.
- Form Fields:**
 - Name:** A text input field with a blue border.
 - Code:** A text input field.
- Options:** Three checkboxes are listed:
 - ☐ This event is inactive
 - ☐ Contributes to Program Unique Supervised Hours (VIC only)
 - ☐ Show new events in calendar (This checkbox is highlighted with a red rectangular border)
- Description:** A large text area with a vertical scrollbar.
- Buttons:** 'Cancel', 'Back', and 'Next' buttons are located at the bottom.



Events

The second page dictates whether you would like this Event to be available for use within your **VETtrak Portal Products**.

This is another added layer of versatility for events – because now you can use them as a scheduling tool across multiple products!

Event Wizard

?

×

Specify availability in web portals.

Select the web portals that the event is available in. Press Next to continue.

Access to events of this type in web portals

Web portal	View	Add
Progress Portal	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Student Web Portal	<input type="checkbox"/>	<input type="checkbox"/>
Trainer Web Portal	<input type="checkbox"/>	<input type="checkbox"/>

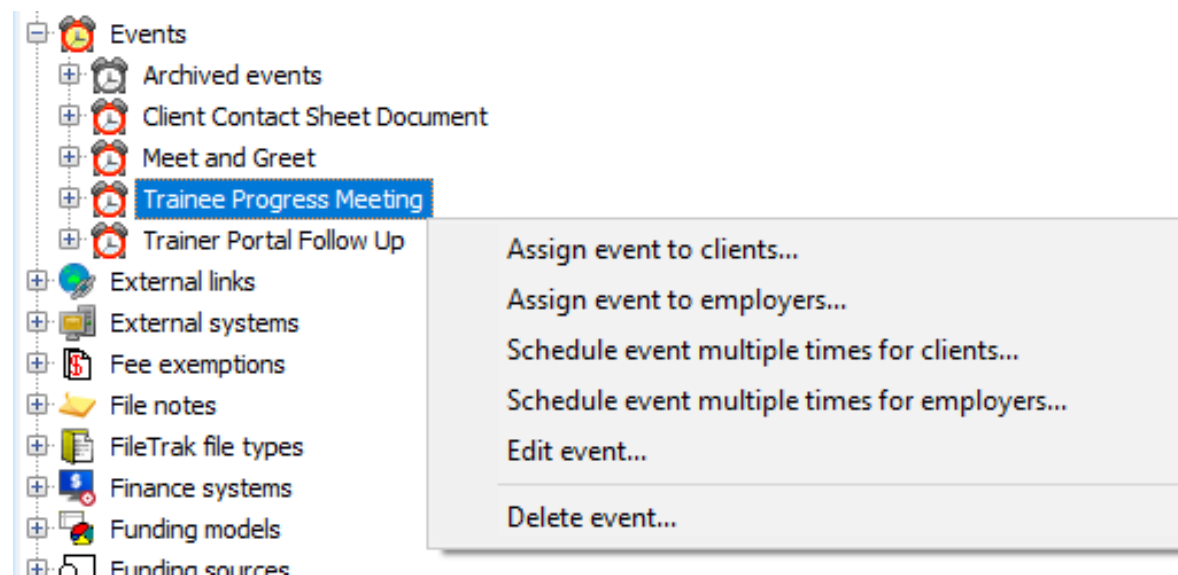
Cancel

Back

Next

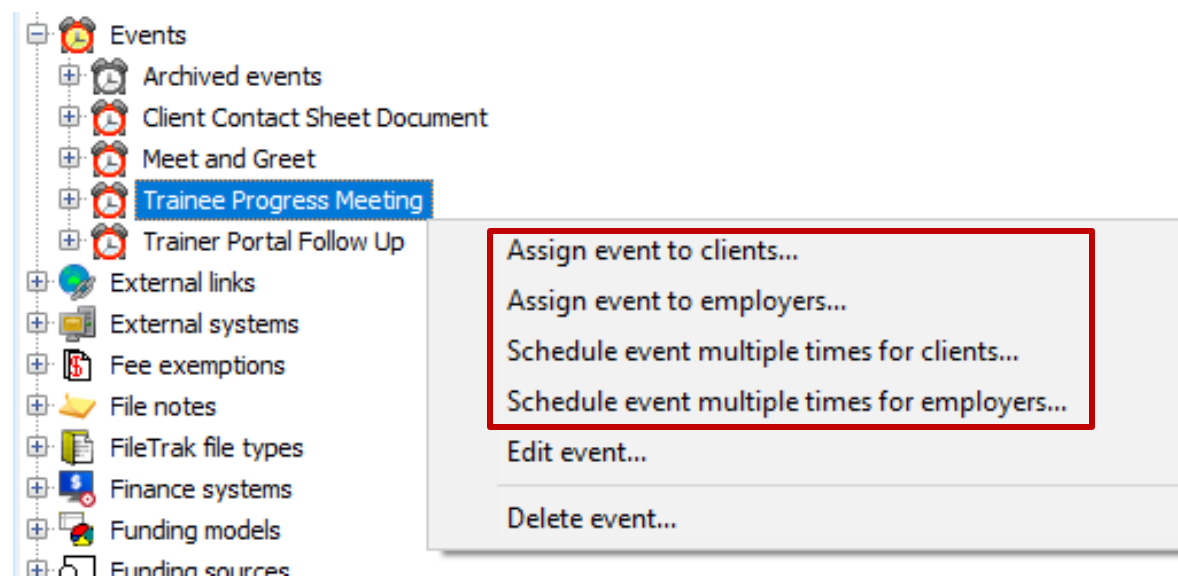
Events

Once your Event has been created – it will display under the Events area of your **Configuration Manager**.



Events

One particularly impressive feature of Events is that you can actually bulk-assign them to Clients and Employers from within the Configuration Manager - simply by **right-clicking** the Event you want and choosing the relevant option.



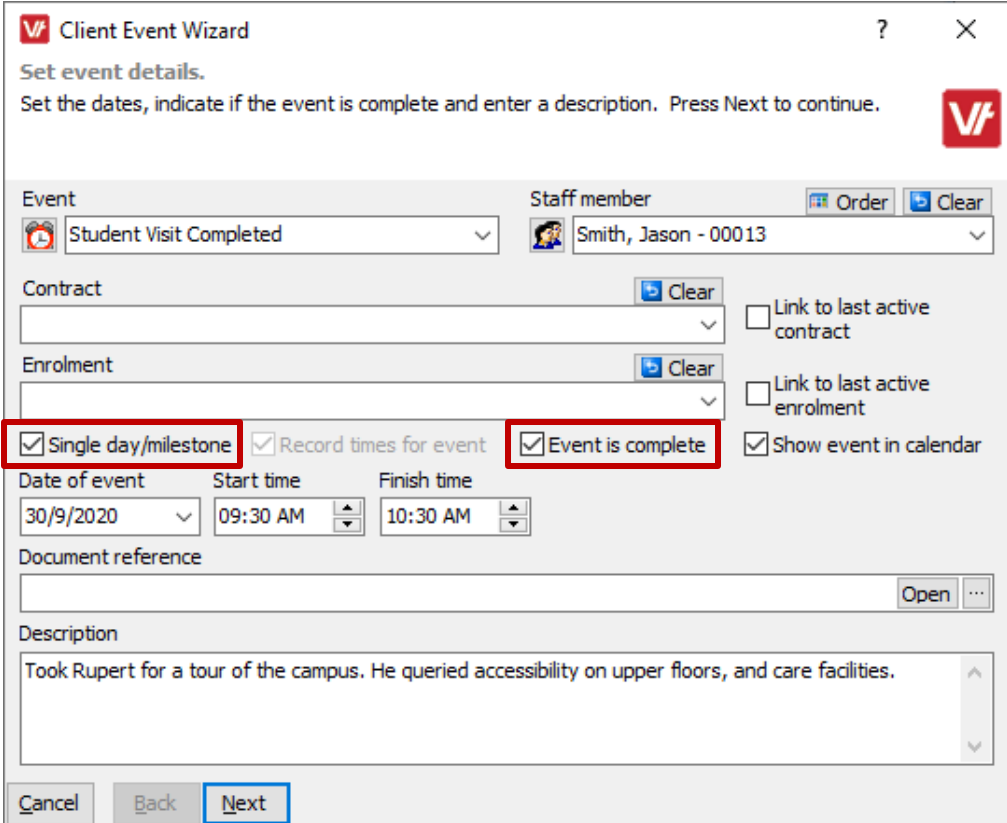


Events

Once your **Event** has been created and assigned to whatever data-element you require – the next steps are up to you!

Events

Some people record **Milestone Events** - a one-and-done Event that is set against a record to reflect '**something that happened**'. No further management is taken, they are all done- you can even immediately mark them as **complete**!



The screenshot shows the 'Client Event Wizard' window with the 'Set event details' section. The form includes fields for Event (Student Visit Completed), Staff member (Smith, Jason - 00013), Contract, and Enrolment. It also has checkboxes for 'Single day/milestone', 'Record times for event', 'Event is complete', 'Link to last active contract', 'Link to last active enrolment', and 'Show event in calendar'. The 'Event is complete' checkbox is highlighted with a red box. The 'Date of event' is set to 30/9/2020, and the 'Start time' and 'Finish time' are 09:30 AM and 10:30 AM respectively. The 'Description' field contains the text: 'Took Rupert for a tour of the campus. He queried accessibility on upper floors, and care facilities.'

Client Event Wizard

Set event details.
Set the dates, indicate if the event is complete and enter a description. Press Next to continue.

Event: Student Visit Completed

Staff member: Smith, Jason - 00013

Contract: [Clear]

Enrolment: [Clear]

☒ Single day/milestone ☒ Record times for event ☒ Event is complete

☐ Link to last active contract

☐ Link to last active enrolment

☒ Show event in calendar

Date of event: 30/9/2020

Start time: 09:30 AM

Finish time: 10:30 AM

Document reference: [Open]

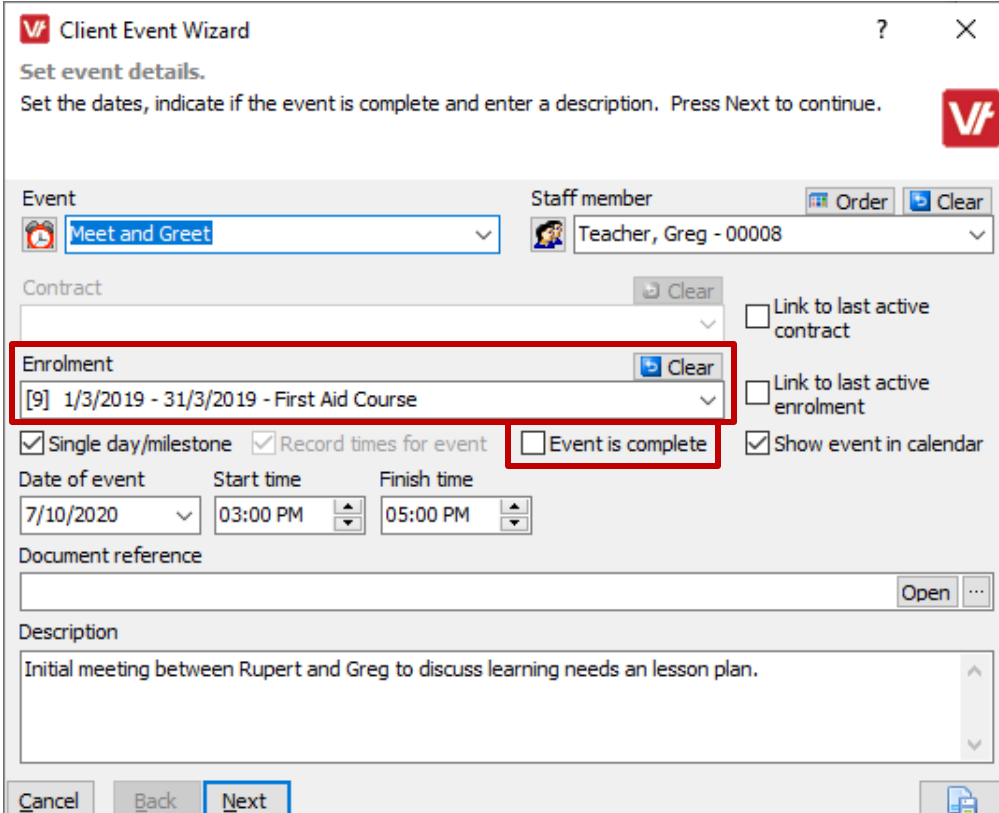
Description: Took Rupert for a tour of the campus. He queried accessibility on upper floors, and care facilities.

Cancel Back Next

Events

Some people create **Follow-up Events** - scheduling a **Task** or **Meeting** that will take place at a later date – reflected in the **Date of Event**.

These '**Incomplete**' events can then be tracked in the software and updated at a later scheduled time



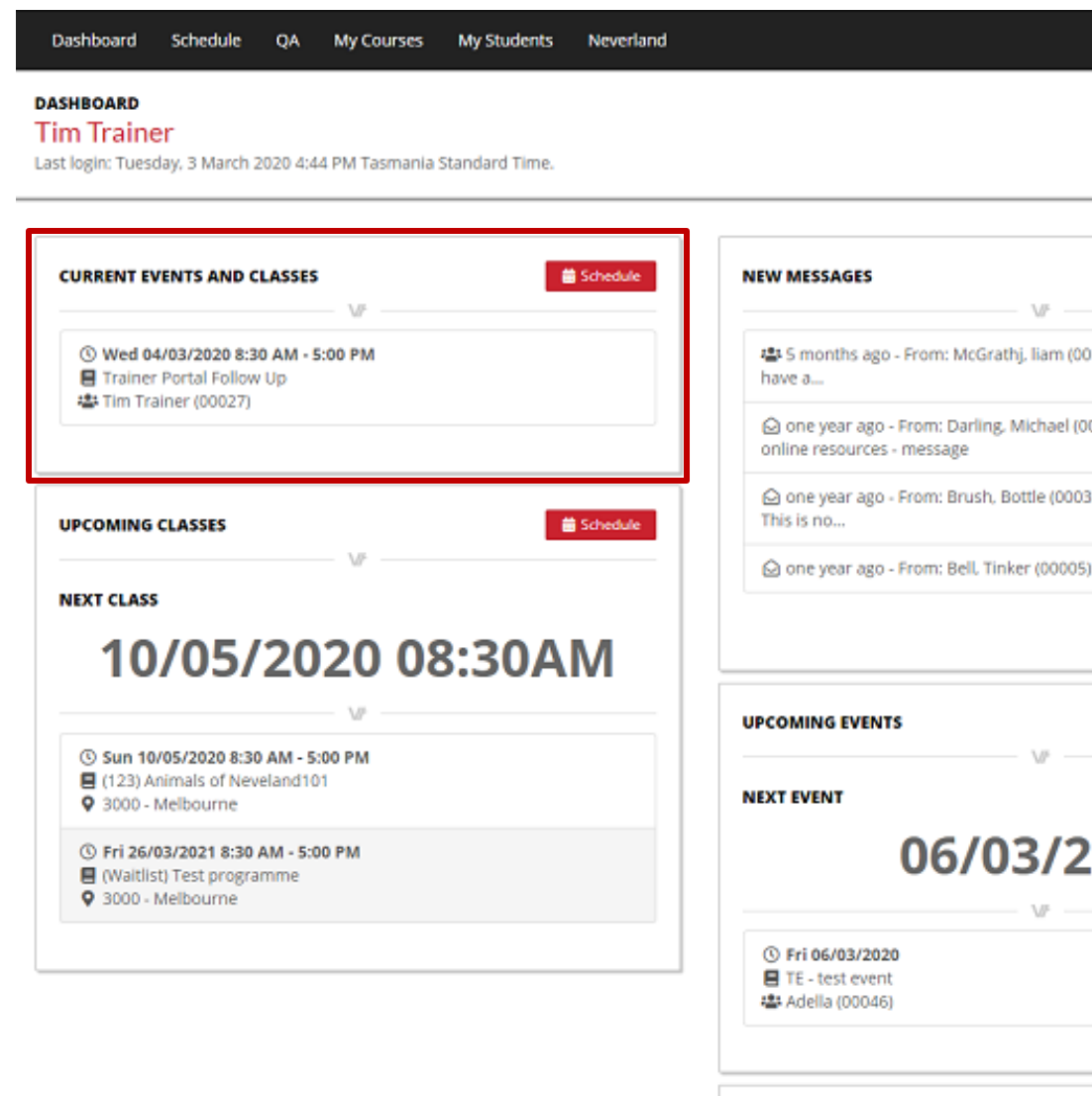
The screenshot shows the 'Client Event Wizard' window with the following details:

- Event:** Meet and Greet
- Staff member:** Teacher, Greg - 00008
- Contract:** (Empty)
- Enrolment:** [9] 1/3/2019 - 31/3/2019 - First Aid Course
- Event is complete:** ☐ (highlighted with a red box)
- Single day/milestone:** ☒
- Record times for event:** ☒
- Date of event:** 7/10/2020
- Start time:** 03:00 PM
- Finish time:** 05:00 PM
- Document reference:** (Empty)
- Description:** Initial meeting between Rupert and Greg to discuss learning needs an lesson plan.

Buttons at the bottom: Cancel, Back, Next, and a file icon.

Events

Events can even be viewed in our **Portal Products** to coordinate with your **Trainer's schedule!**



The screenshot displays the VT Admin Portal interface. At the top, a navigation bar includes links for Dashboard, Schedule, QA, My Courses, My Students, and Neverland. Below this, the user is identified as Tim Trainer, with a last login timestamp of Tuesday, 3 March 2020 4:44 PM Tasmania Standard Time.

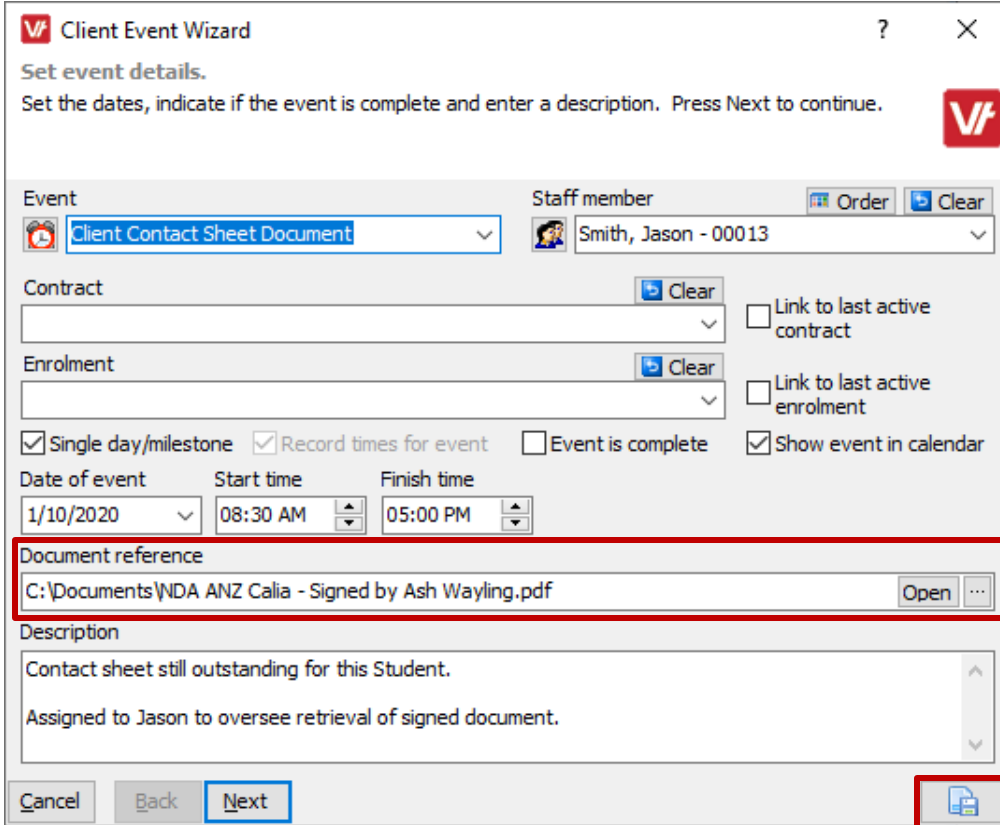
The main content area is divided into several sections. The 'CURRENT EVENTS AND CLASSES' section is highlighted with a red border and contains a single event entry: 'Wed 04/03/2020 8:30 AM - 5:00 PM', titled 'Trainer Portal Follow Up', associated with 'Tim Trainer (00027)'. A red 'Schedule' button is located to the right of this section.

Below the highlighted section is the 'UPCOMING CLASSES' section, which features a 'NEXT CLASS' entry for '10/05/2020 08:30AM'. This entry details a class on 'Sun 10/05/2020 8:30 AM - 5:00 PM' titled '(123) Animals of Neveland101' at '3000 - Melbourne'. A second entry for 'Fri 26/03/2021 8:30 AM - 5:00 PM' titled '(Waitlist) Test programme' at '3000 - Melbourne' is also visible. A red 'Schedule' button is also present to the right of this section.

On the right side of the interface, there are sections for 'NEW MESSAGES' and 'UPCOMING EVENTS'. The 'NEW MESSAGES' section lists three messages from various users. The 'UPCOMING EVENTS' section shows a 'NEXT EVENT' for '06/03/2020' titled 'TE - test event' associated with 'Adella (00046)'.

Events

Because **Events** have a range of options for referencing **Documents**, many use them as a way to track and schedule particular documents requirements within their business.

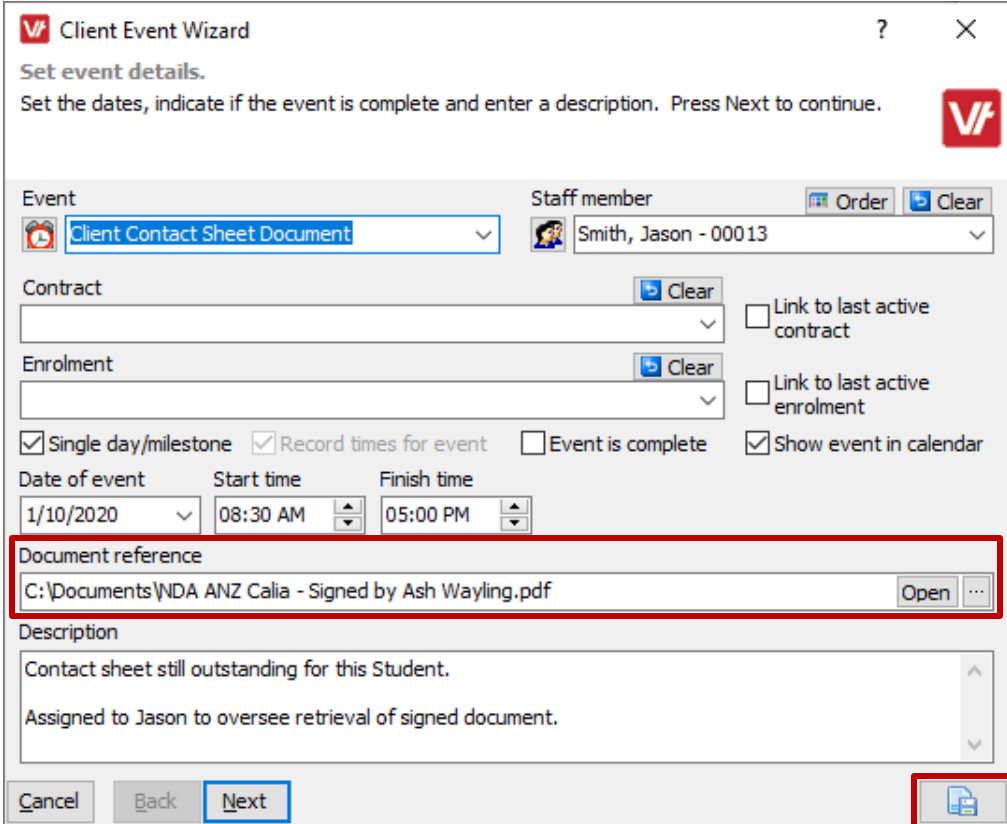


The screenshot shows the 'Client Event Wizard' window with the following details:

- Event:** Client Contact Sheet Document
- Staff member:** Smith, Jason - 00013
- Contract:** (Empty field with a 'Clear' button)
- Enrolment:** (Empty field with a 'Clear' button)
- Checkboxes:**
 - ☒ Single day/milestone
 - ☒ Record times for event
 - ☐ Event is complete
 - ☒ Show event in calendar
- Date of event:** 1/10/2020
- Start time:** 08:30 AM
- Finish time:** 05:00 PM
- Document reference:** C:\Documents\NDA ANZ Calia - Signed by Ash Wayling.pdf (This field is highlighted with a red box, along with the 'Open' button and a file icon button next to it).
- Description:**
 - Contact sheet still outstanding for this Student.
 - Assigned to Jason to oversee retrieval of signed document.
- Buttons:** Cancel, Back, Next (The 'Next' button is highlighted with a blue border, and a file icon button is highlighted with a red box in the bottom right corner).

Events

And since **Events** are intrinsically designed to monitor dates, they serve as a perfect way to create deadlines for paperwork!



The screenshot displays the 'Client Event Wizard' window. The 'Set event details' section includes fields for 'Event' (Client Contact Sheet Document), 'Staff member' (Smith, Jason - 00013), 'Contract', and 'Enrolment'. It also features checkboxes for 'Single day/milestone', 'Record times for event', 'Event is complete', and 'Show event in calendar'. The 'Date of event' is set to 1/10/2020, with 'Start time' at 08:30 AM and 'Finish time' at 05:00 PM. A red box highlights the 'Document reference' field, which contains the path 'C:\Documents\NDA ANZ Calia - Signed by Ash Wayling.pdf'. Below this is a 'Description' field with the text 'Contact sheet still outstanding for this Student. Assigned to Jason to oversee retrieval of signed document.' At the bottom, there are 'Cancel', 'Back', and 'Next' buttons, with a red box highlighting a file icon button on the right.

Client Event Wizard

Set event details.
Set the dates, indicate if the event is complete and enter a description. Press Next to continue.

Event: Client Contact Sheet Document

Staff member: Smith, Jason - 00013

Contract: [Clear]

Enrolment: [Clear]

☒ Single day/milestone ☒ Record times for event ☐ Event is complete ☒ Show event in calendar

Date of event: 1/10/2020 Start time: 08:30 AM Finish time: 05:00 PM

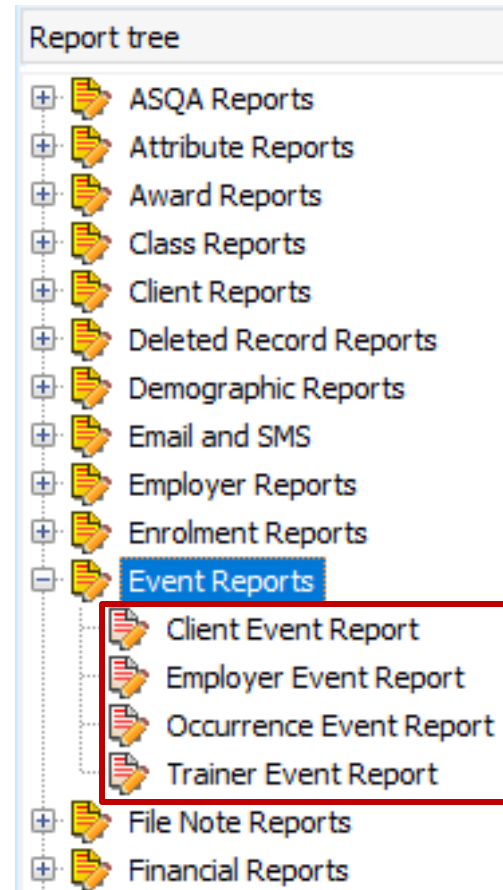
Document reference: C:\Documents\NDA ANZ Calia - Signed by Ash Wayling.pdf [Open] [...]

Description: Contact sheet still outstanding for this Student.
Assigned to Jason to oversee retrieval of signed document.

Cancel Back Next [File Icon]

Events

It is also worth mentioning - as **Events** are all linked to existing data elements within your database – you can utilise **Standard Reports** to retrieve and view information in detail!



Let's take a closer look!

Here is an article that will help get your started with **Events**:

[VETtrak Help Centre: Events](#)



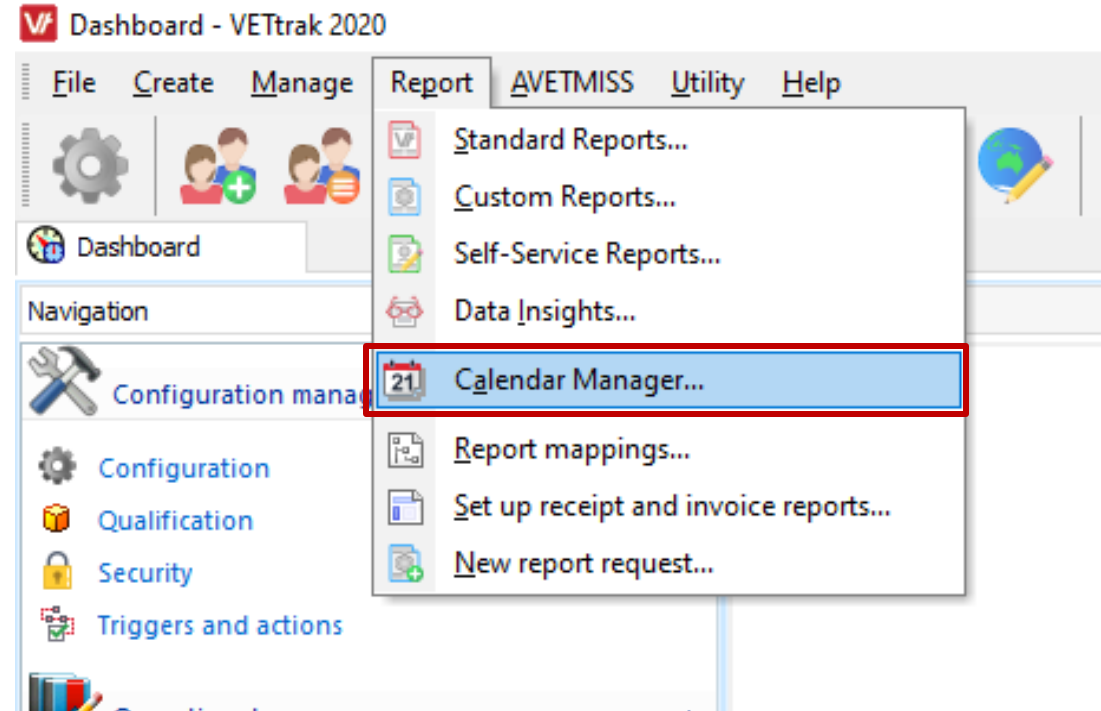


Item:
What is
The Calendar?

The Calendar

A well-hidden secret under the **Report** heading within **VETtrak**, is the **Calendar Manager**.

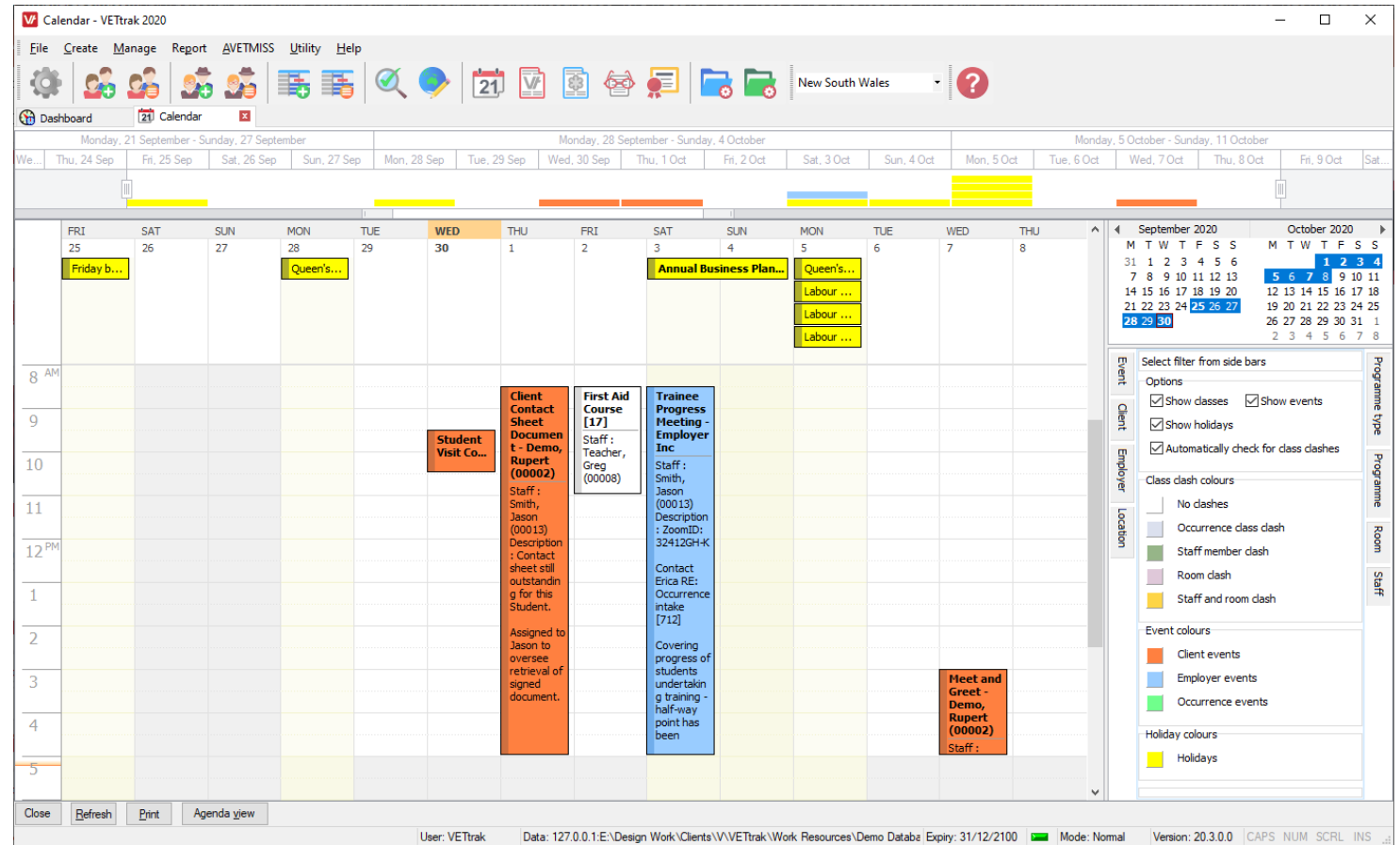
When dealing with date-dependant data elements, it makes sense to use a manager that is designed to efficiently display this data, right?



The Calendar

The **Calendar Manager** is designed to show **Event**, **Class** and **Holiday** information in a layout that can be dynamically shifted to show particular time periods – while also offering a set of filter options to shape what you are seeing.

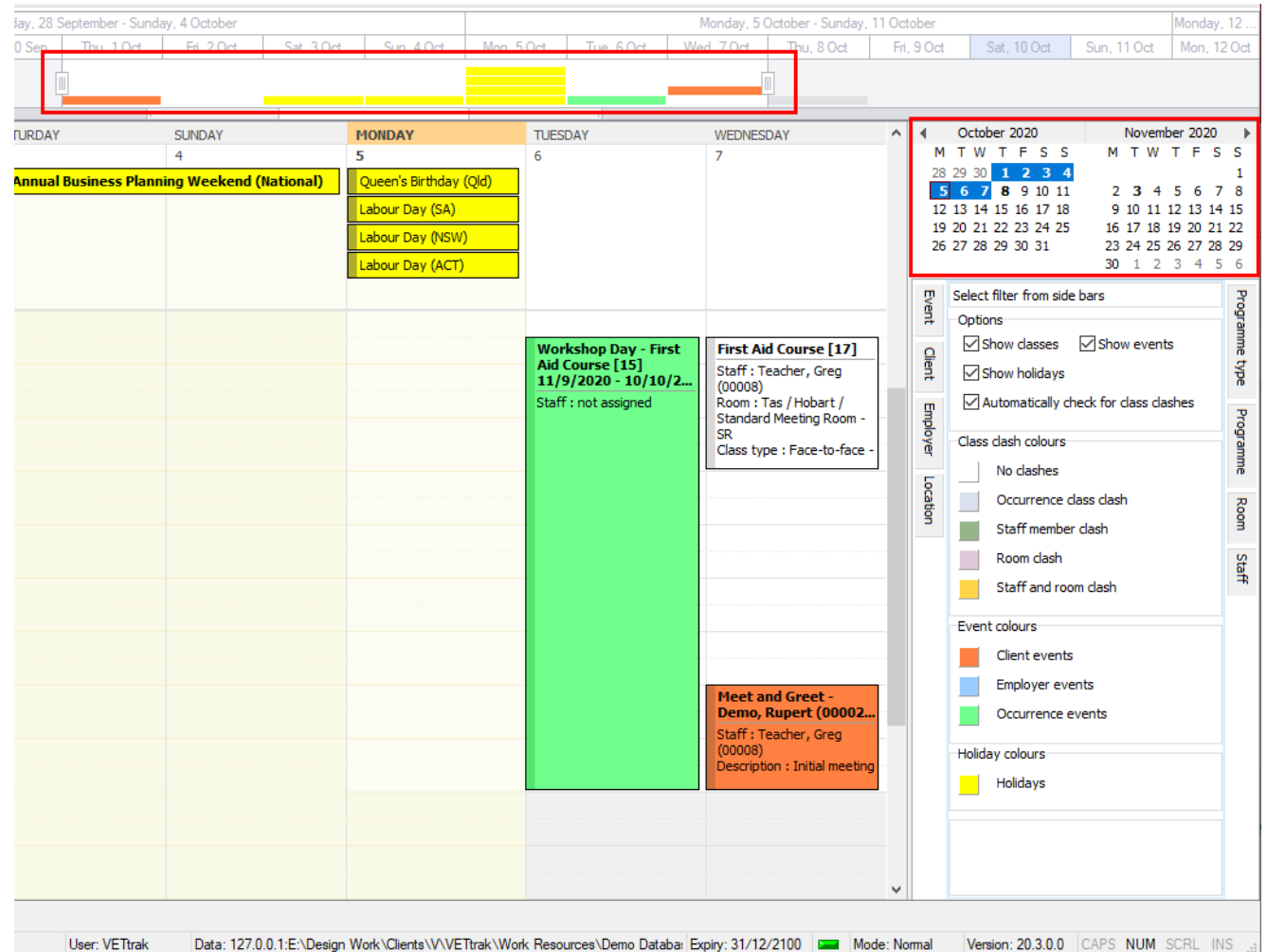
There are also tools to export the data you see in this area for your own specific needs!



The Calendar

You can specify the period to be displayed by adjusting the timeline area at the top of the manager, as well as manipulating the **Day/Month** view in the top-right hand side.

Clicking and **dragging** your mouse cursor across multiple days will adjust the displayed days in the main window area.

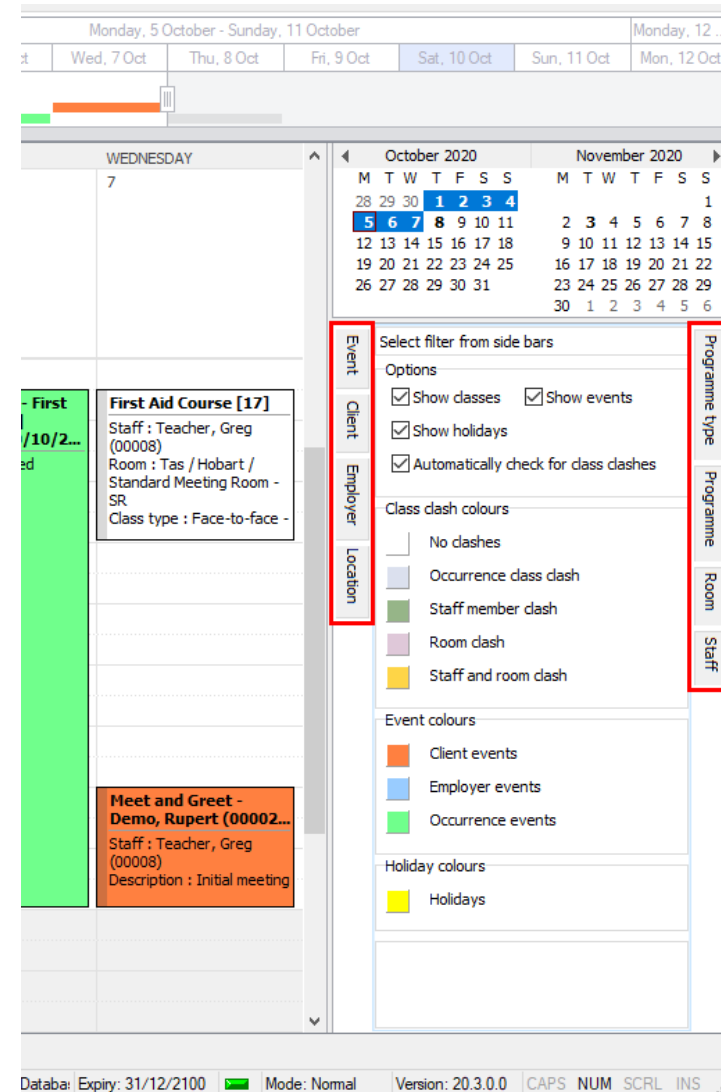


The screenshot displays the VT Admin Calendar interface. At the top, a timeline bar allows users to select a date range, with a red box highlighting the current selection from Thursday, 1 October to Sunday, 4 October. Below this, the main calendar grid shows events for the week of Monday, 5 October to Sunday, 11 October. Events include 'Annual Business Planning Weekend (National)' on Sunday, 'Queen's Birthday (Qld)' on Monday, 'Labour Day (SA)', 'Labour Day (NSW)', and 'Labour Day (ACT)' on Monday, 'Workshop Day - First Aid Course [15]' on Tuesday, 'First Aid Course [17]' on Wednesday, and 'Meet and Greet - Demo, Rupert (00002...)' on Wednesday. The right-hand sidebar contains filters and settings, including 'Select filter from side bars', 'Options' (Show classes, Show events, Show holidays, Automatically check for class clashes), 'Class clash colours' (No clashes, Occurrence class clash, Staff member clash, Room clash, Staff and room clash), 'Event colours' (Client events, Employer events, Occurrence events), and 'Holiday colours' (Holidays). The bottom status bar shows 'User: VETtrak', 'Data: 127.0.0.1:E:\Design Work\Clients\V\VT\Work Resources\Demo Databa', 'Expiry: 31/12/2100', 'Mode: Normal', 'Version: 20.3.0.0', and 'CAPS NUM SCRL INS'.

The Calendar

The far-right hand panel has many tabs that represent different filterable data within the calendar.

Move your mouse cursor over any one of these panels to see a range of options to shape the information being displayed.



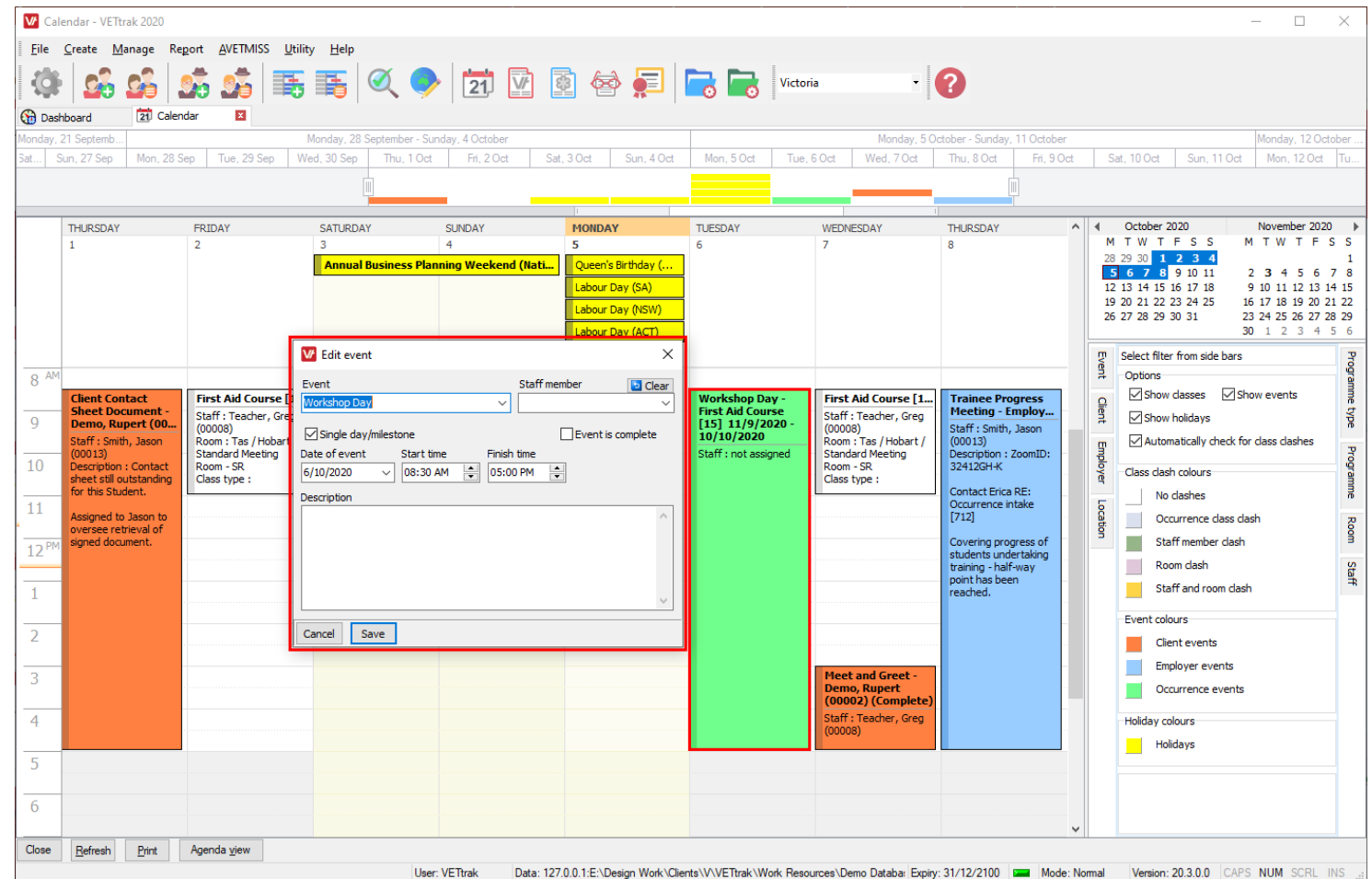
The screenshot displays the VT Admin Calendar interface. At the top, a navigation bar shows the current date range: Monday, 5 October - Sunday, 11 October. Below this, a calendar grid for October 2020 is visible, with dates 1 through 31. The interface is divided into several panels. On the left, a panel titled 'First Aid Course [17]' shows details for a staff member (Teacher, Greg (00008)) in a room (Tas / Hobart / Standard Meeting Room - SR) with a class type of 'Face-to-face'. Below this, another panel titled 'Meet and Greet - Demo, Rupert (00002...)' shows details for a staff member (Teacher, Greg (00008)) with a description of 'Initial meeting'. On the right, a panel titled 'Select filter from side bars' contains various options for filtering the calendar view. These options include checkboxes for 'Show classes', 'Show events', 'Show holidays', and 'Automatically check for class clashes'. Below these are sections for 'Class clash colours' (No clashes, Occurrence class clash, Staff member clash, Room clash, Staff and room clash), 'Event colours' (Client events, Employer events, Occurrence events), and 'Holiday colours' (Holidays). The bottom of the interface shows a status bar with information such as 'Databa: Expiry: 31/12/2100', 'Mode: Normal', 'Version: 20.3.0.0', and 'CAPS NUM SCRL INS'.

Enhancing Your VT Admin Experience



The Calendar

Double-clicking on most items within the calendar will provide you with a wizard to manipulate and save new information for that item.

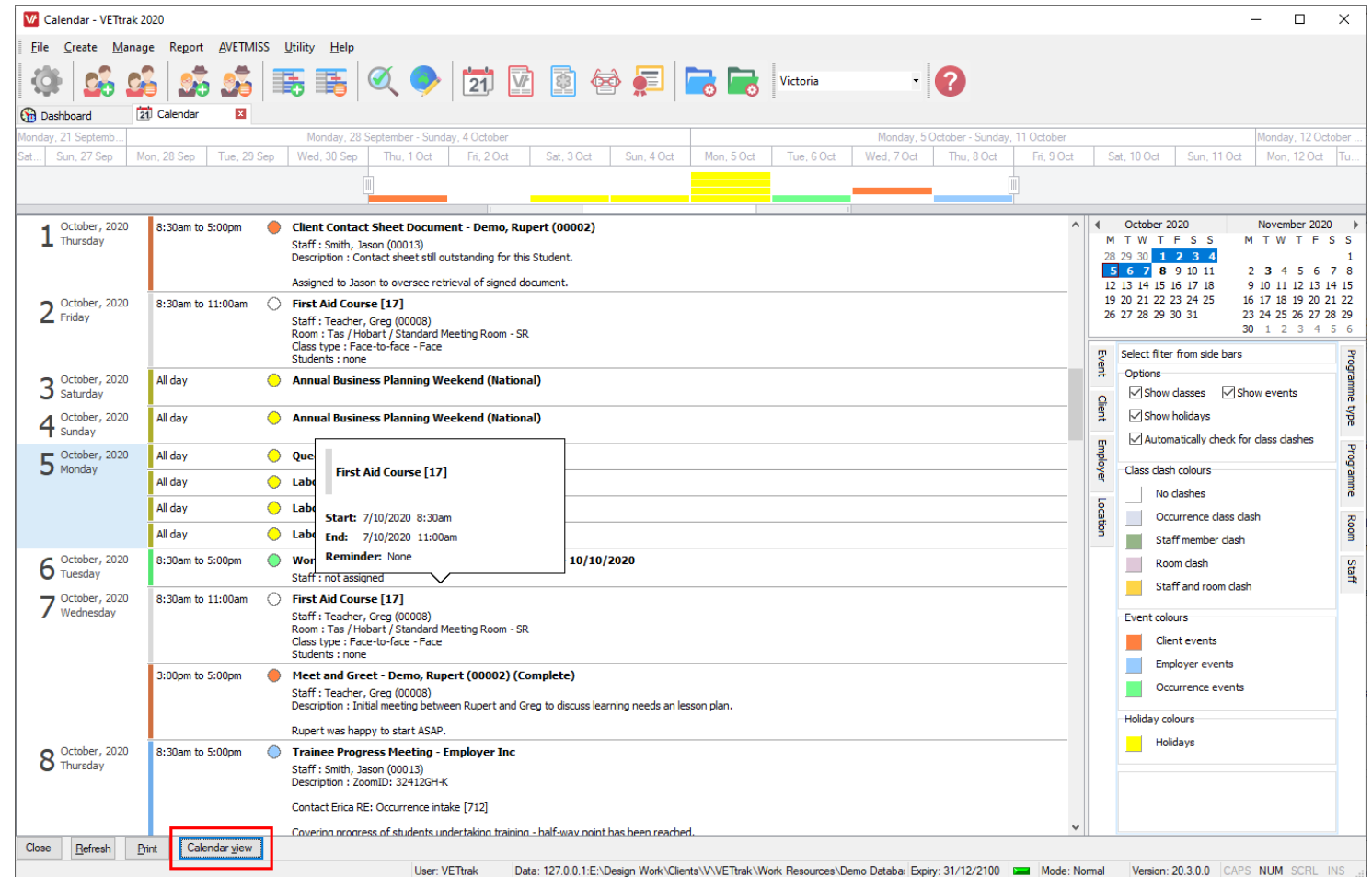


Enhancing Your VT Admin Experience



The Calendar

You can also change the formatted view of your calendar in the bottom left-hand side between an **Agenda** view, and the standard **Calendar** view – offering a specialised view for different needs.



Let's get our hands dirty!

Here is an article that will help get your started with the **Calendar**:

[VETtrak Help Centre: The Calendar](#)





Item:
That's a Wrap!



Having a robust understand of date-relevant data options within **VETtrak** can do a lot to improve the workflow of your company.

Not to mention, helping to avoid scheduling conflicts and errors!

If you get stuck!



The **VETtrak** Help Centre has a range of useful articles to assist with using the features we have spotlighted today:

- [Configuration Manager Overview](#)
- [Adding a new Event](#)
- [Assigning an Event from the Configuration Manager](#)
- [Student Events in the Trainer Portal](#)
- [Holidays](#)
- [Adding a new Holiday](#)
- [Editing an existing Holiday](#)
- [Viewing the Holiday report](#)