VETtrak AcademyPlus

Enhancing Your VT Admin Experience (Part 1)

VETtrak. Number 1 in RTO

Welcome to VETtrak Academy**Plus!**

This session is specially designed for <u>your</u> learning experience, based on your feedback.

We will be covering the subject through a series of modular sections that focus on unique features within the **VET**trak Configuration manager, providing opportunities for questions throughout.

Let's collaborate and learn together.

VETtrak AcademyPlus

Enhancing Your VT Admin Experience

This session will cover:

1. Welcome to the **Configuration Manager!**
2. What are **Attributes**?
3. Creating/Managing/Assigning Attributes
4. Example/Demonstration: Attributes
5. What are **Custom Fields**?
6. Creating/Using Custom Fields
7. Example/Demonstration: Custom Fields
8. What are **File Notes**?
9. Creating/Entering File Note Types
10. Example/Demonstration: File Notes
11. Additional Resources

Item:

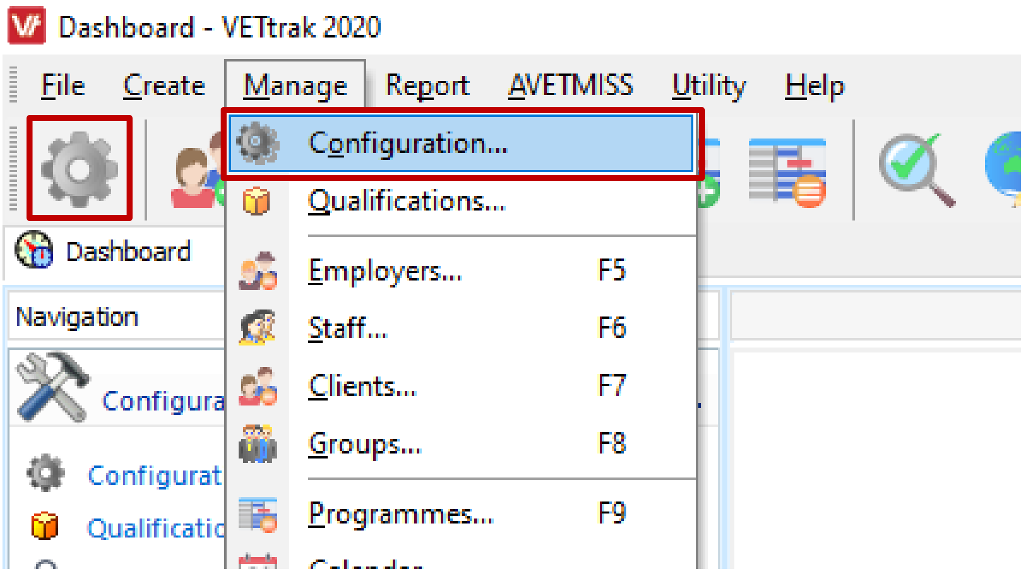
Welcome to

The Configuration Manager!

The
Configuration Manager

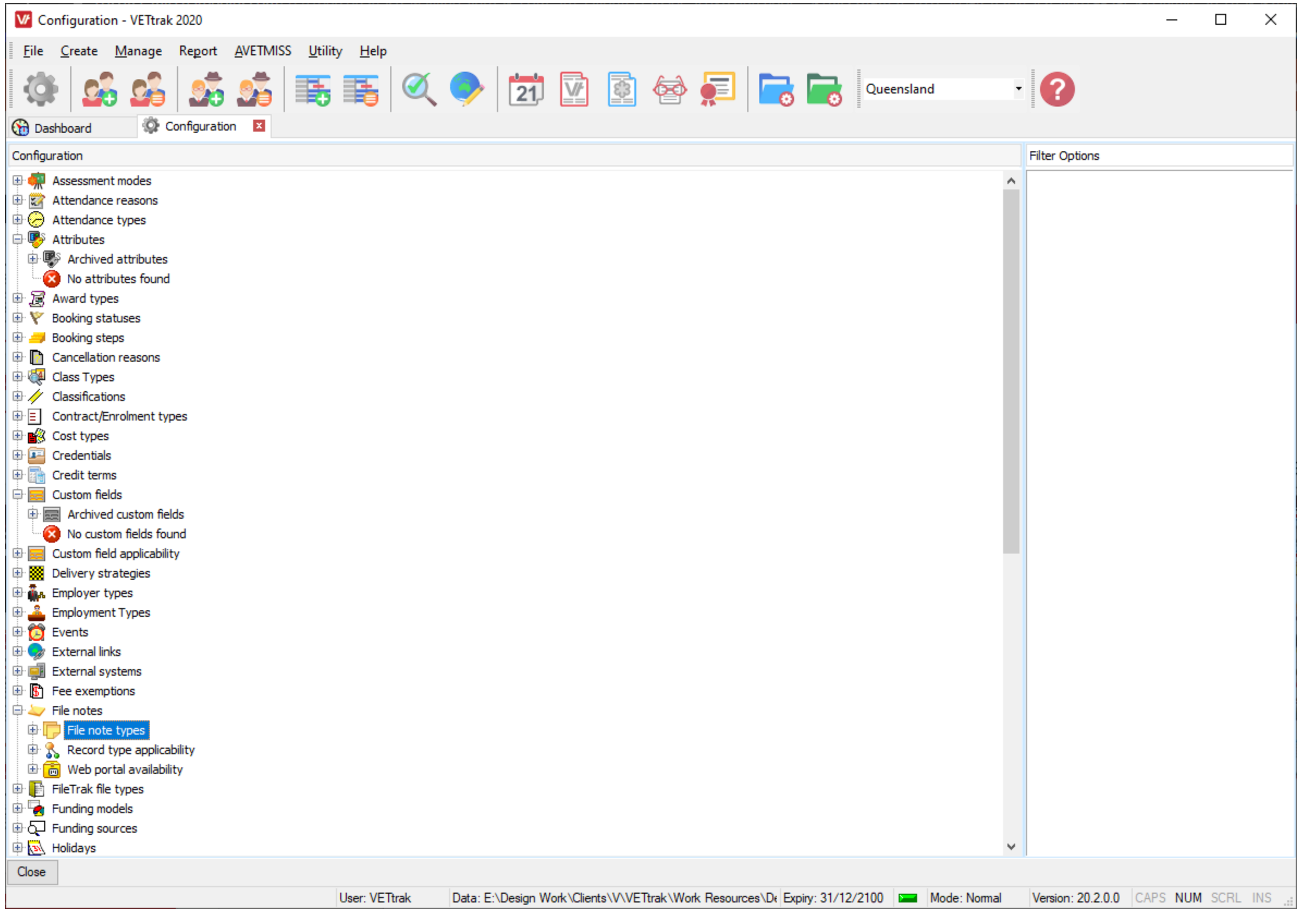
The **VET**trak Configuration Manager is a unique manager of **VET**trak containing many back-end data entry options, as well as well as configurations tools for optional features.

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

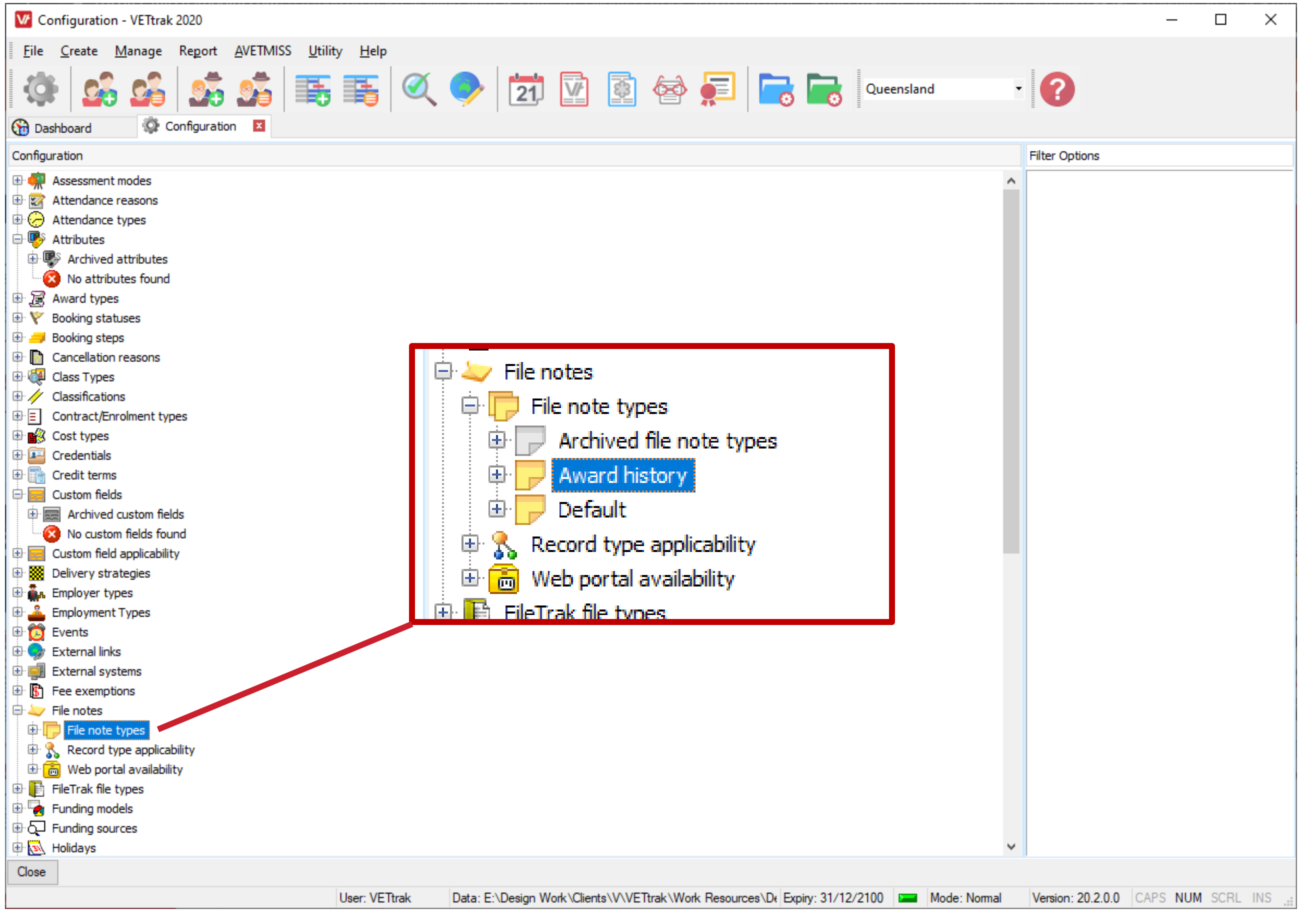
The manager itself is displayed as a long list of headings, presented in alphabetical order.



Enhancing Your VT Admin Experience

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

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



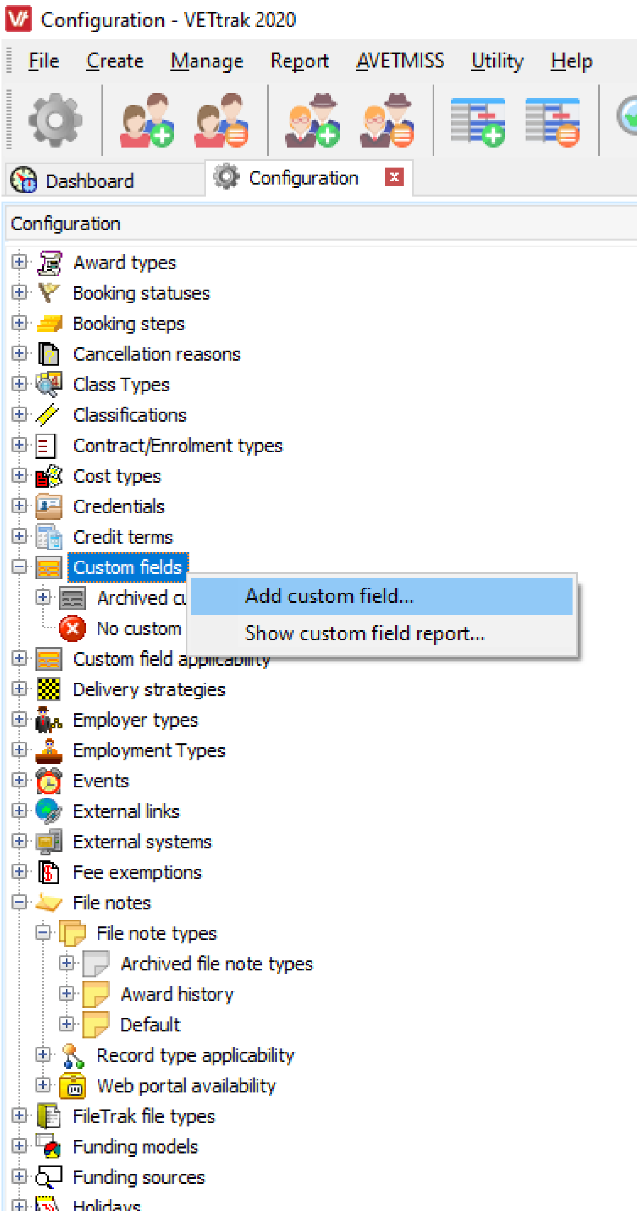
Enhancing Your VT Admin Experience

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:

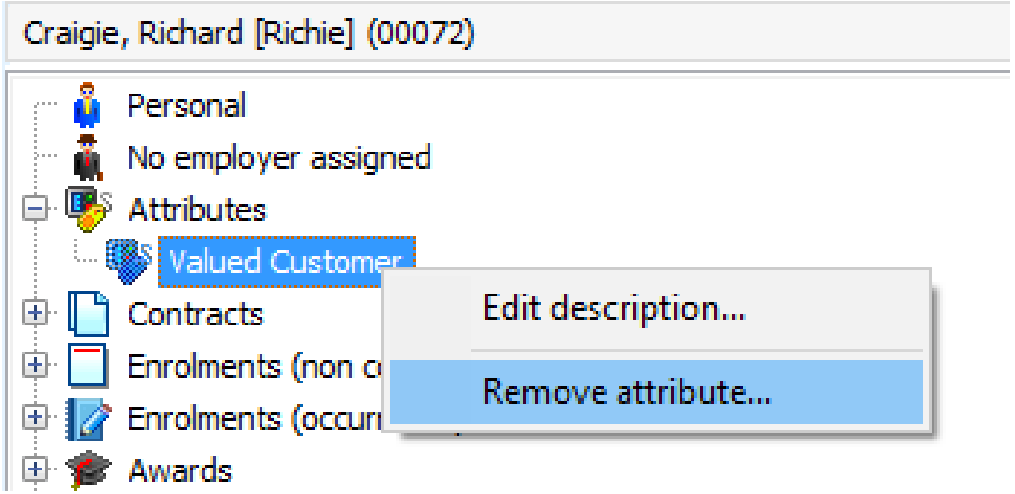
What are **Attributes?**

Attributes

Attributes are a way of recording custom information against a client or employer.

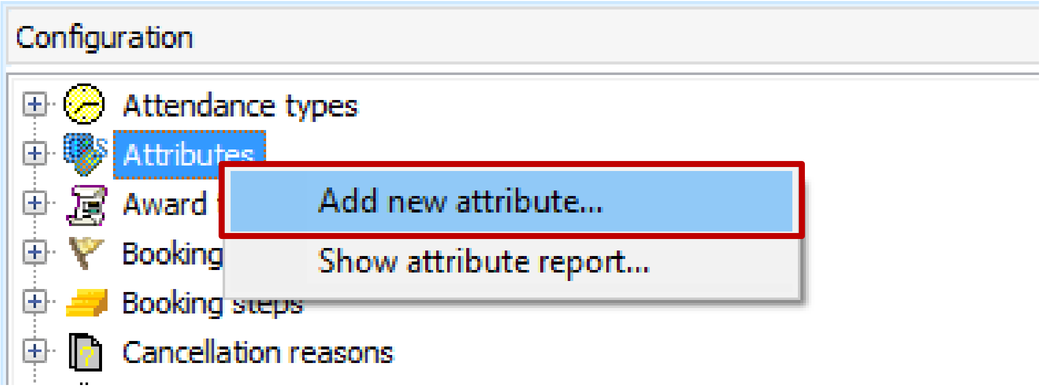
They are commonly used as a 'tagging' mechanism so you can identify certain clients or employers via a particular attribute. This is most useful when you want to record whether a student (or employer) has, or does not have a particular trait or 'thing'.

Attributes can also be flagged as 'Important' to better draw attention to particular attributes when present.



Attributes

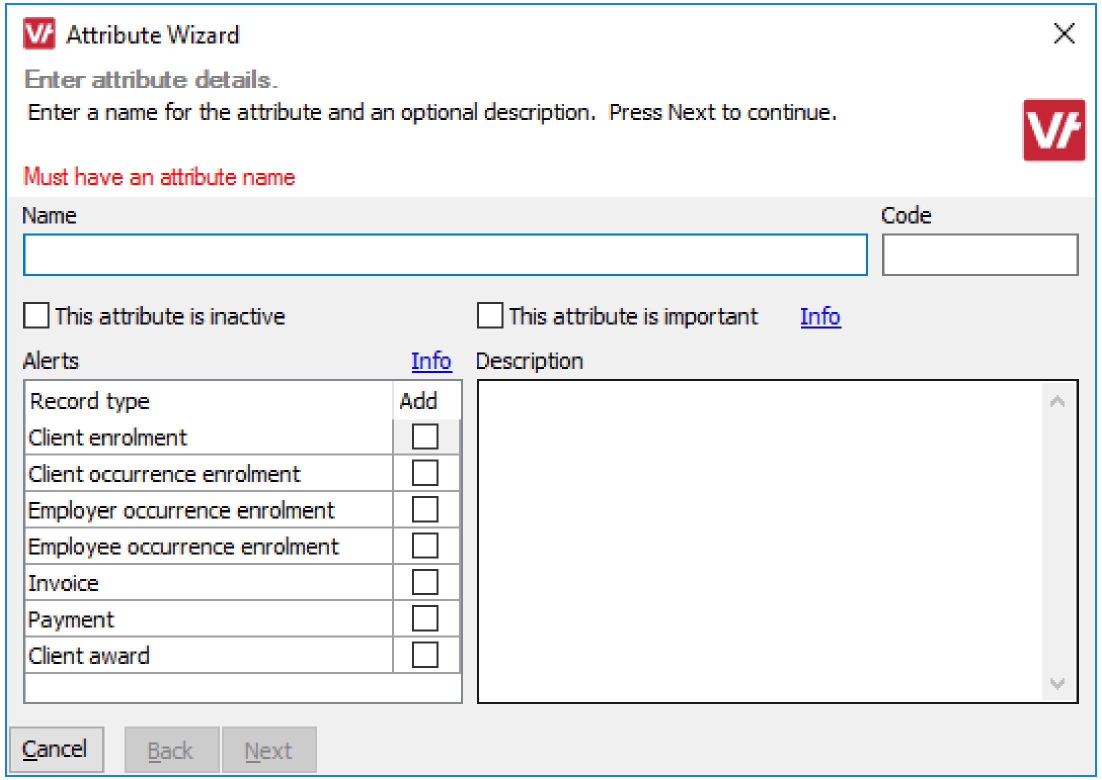
To create a new **Attribute,** right-click the **Attributes** heading and choose **Add new attribute**:



Attributes

This will open the **Attribute** wizard!

Within this area, you can configure the **Name** and **Code** for your Attribute, as well as flagging information such as whether it is considered an **Important** attribute.

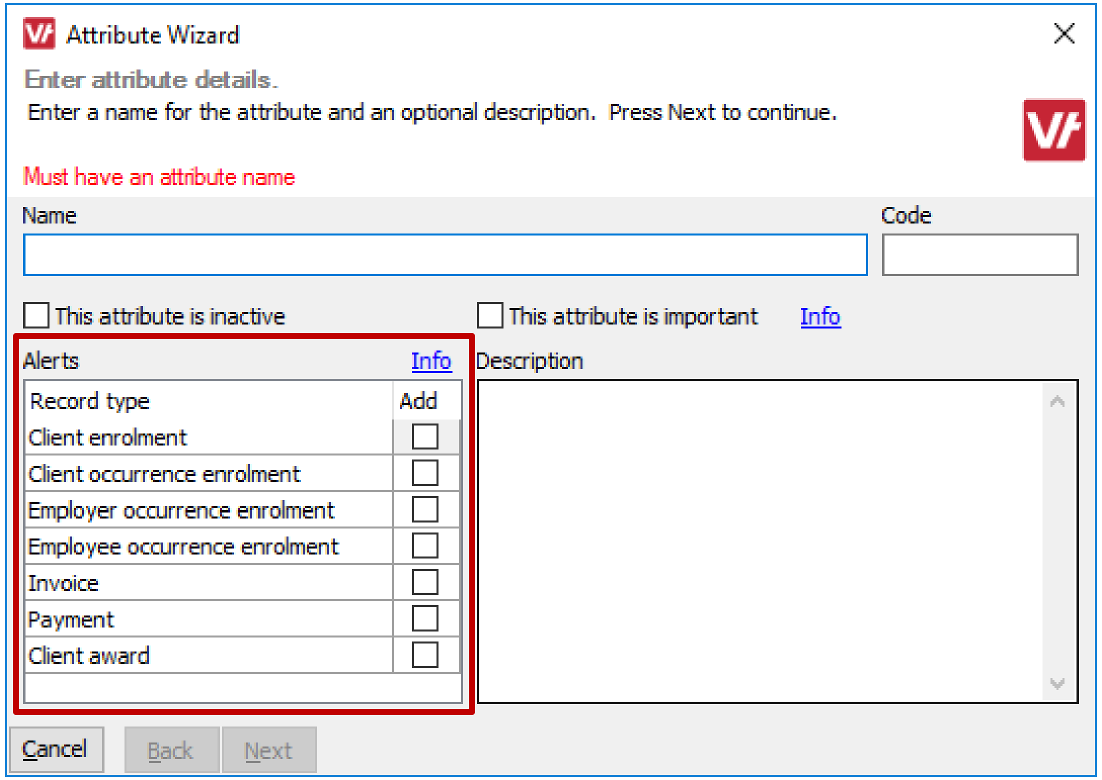


Attributes

This will open the **Attribute** wizard!

Within this area, you can configure the **Name** and **Code** for your Attribute, as well as flagging information such as whether it is considered an **Important** attribute.

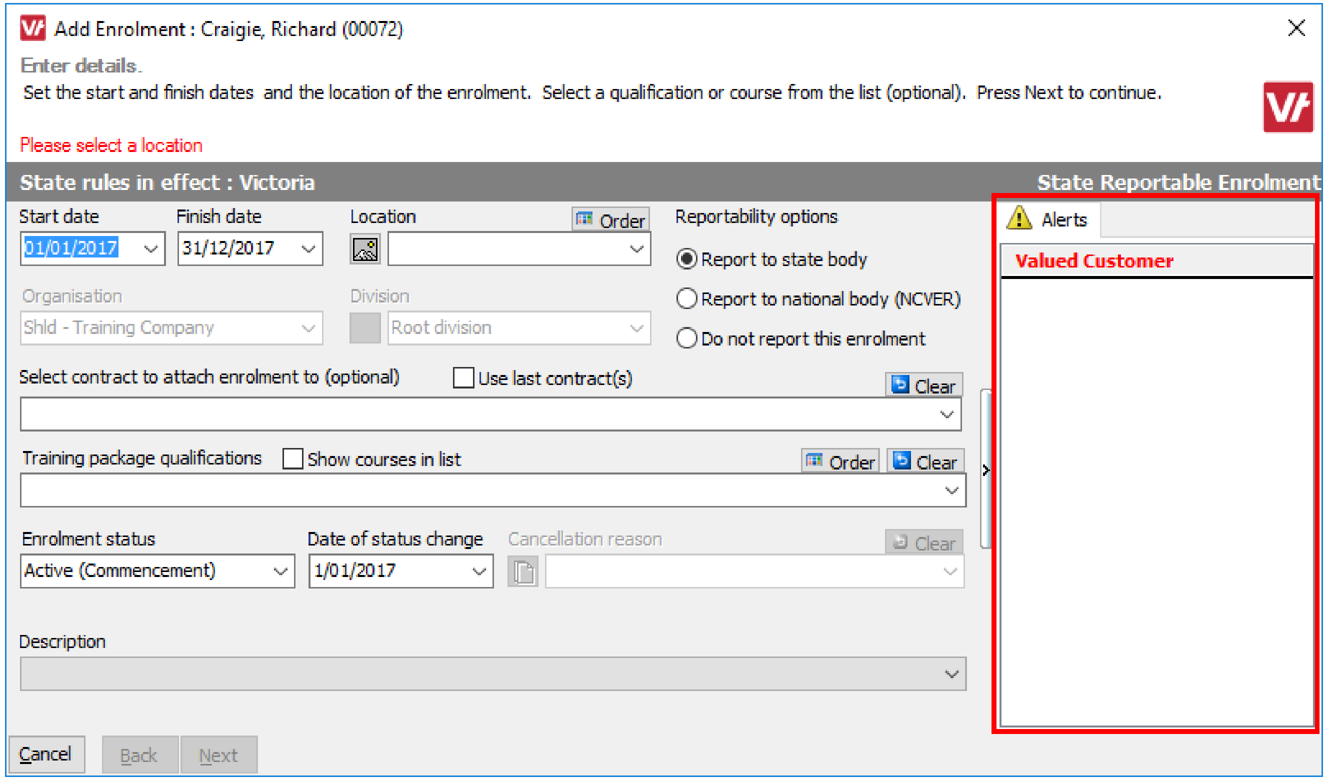
There is also a unique method to force the attribute to display as an **Alert** when you are within a specific **VET**trak wizard for the person/company that is flagged with the attribute.



Attributes

This will **Alert** area will actually display as a unique, expanded area for that wizard – ensuring that you do not miss its information!

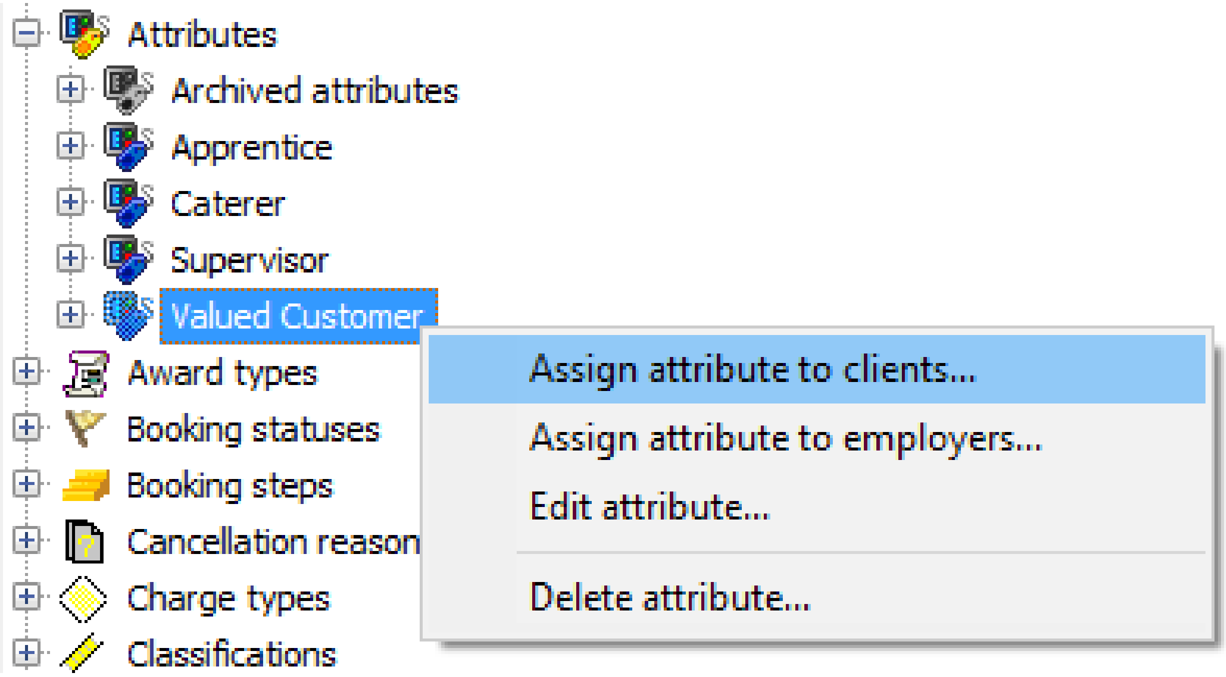
This can be incredibly useful for communicating information to your **VET**trak users, mid-process.



Attributes

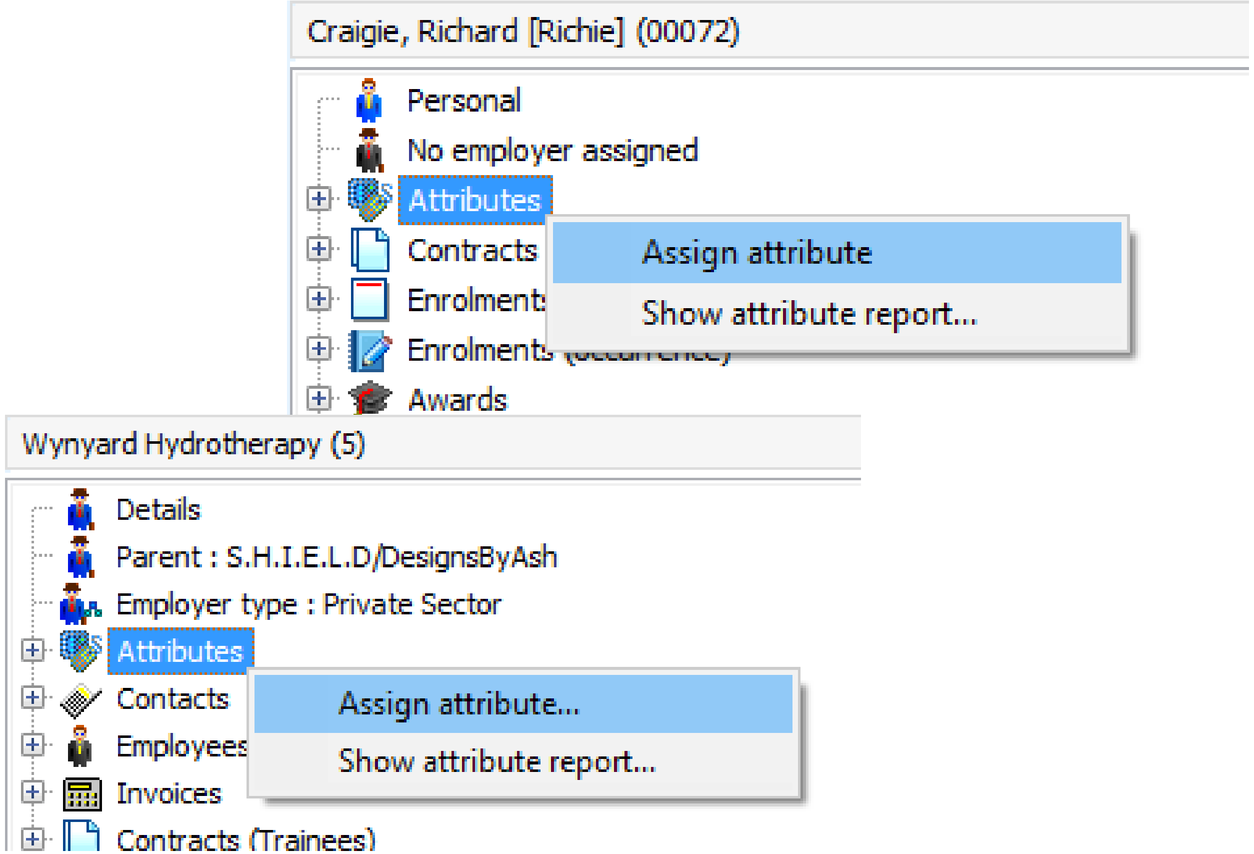
There are also multiple methods to assign Attributes.

Within the **Configuration Manager** you can choose to mass-assign to Clients and Employers by right-clicking on an existing attribute:



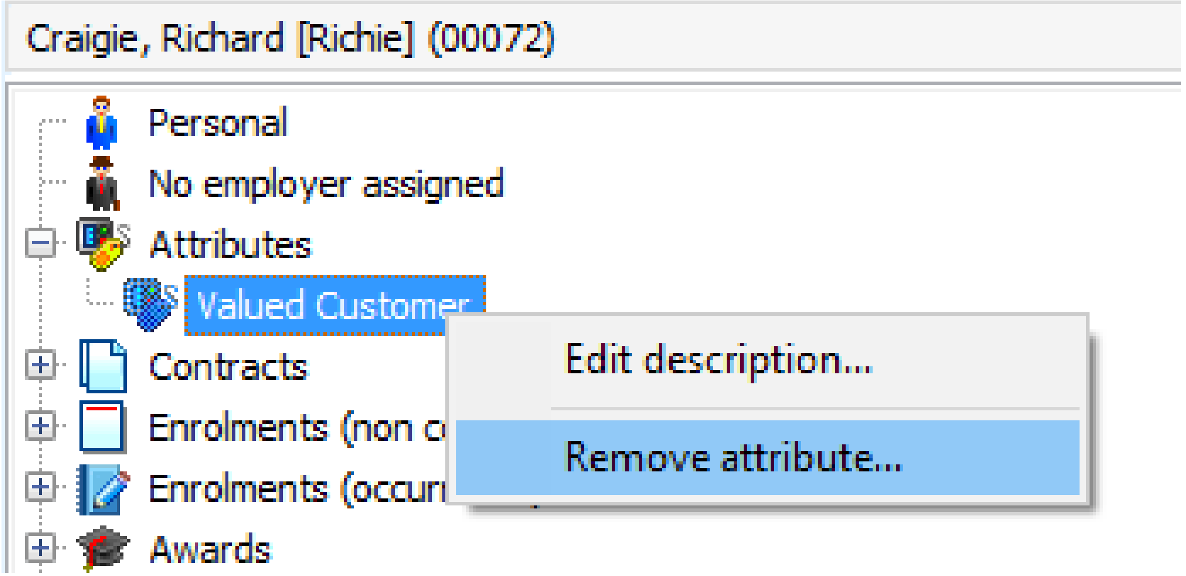
Attributes

Within the **Client and Employer Manager** you can choose to directly assign an attribute by right-clicking the **Attributes** heading:



Attributes

Attributes will then display under this heading, and can be managed/removed by right-clicking the specific attribute:



Let's get our hands dirty!

Here is an article that will help get your started with creating **Attributes.**

VETtrak Help Centre: Attributes

Item:

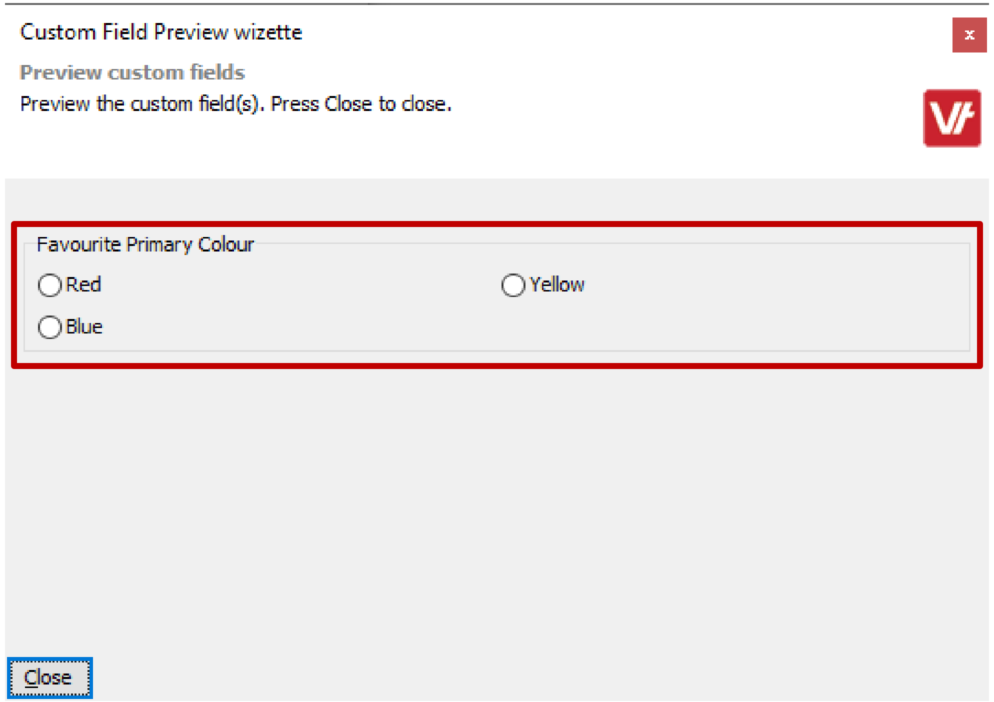
What are **Custom Fields?**

Custom Fields

VETtrak also allows you to configure **Custom Fields** for recording additional information that is specific to your organisation.

You can create your own custom fields that allow you to enter information in the appropriate wizard and store it within the VETtrak database.

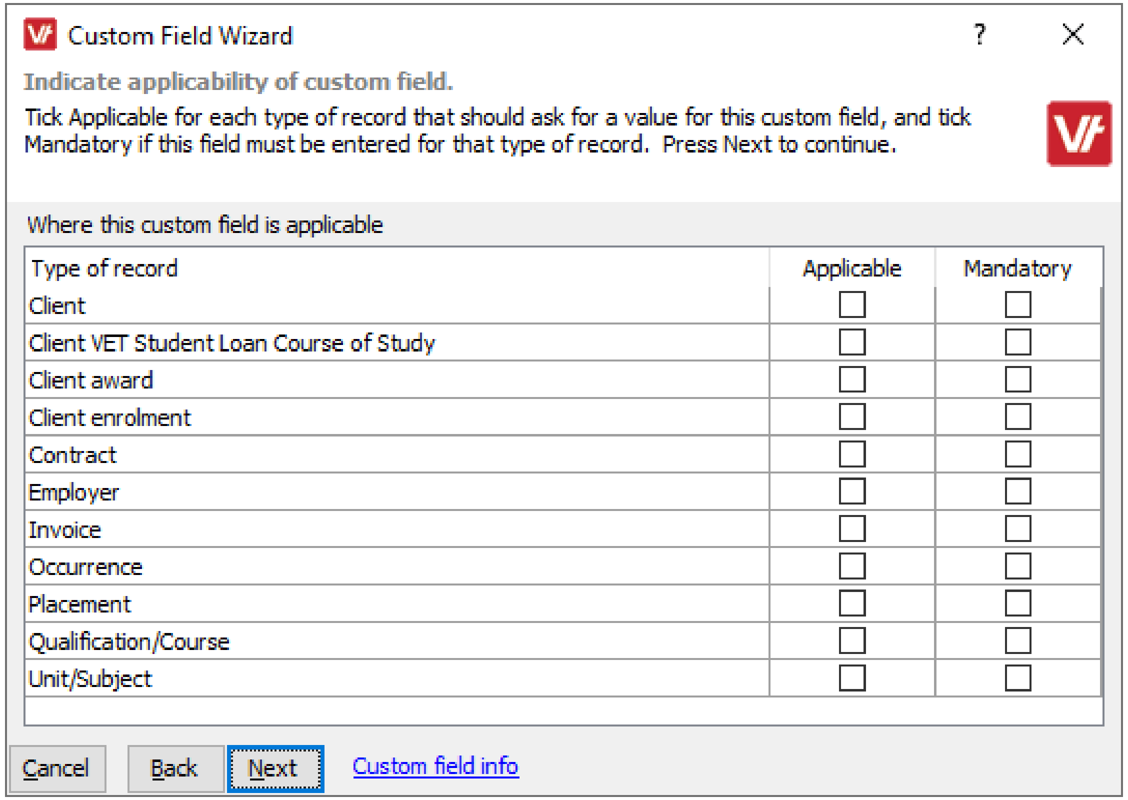
This can be most helpful for collecting unique data and expanding on processes that directly benefit your company!



Custom Fields

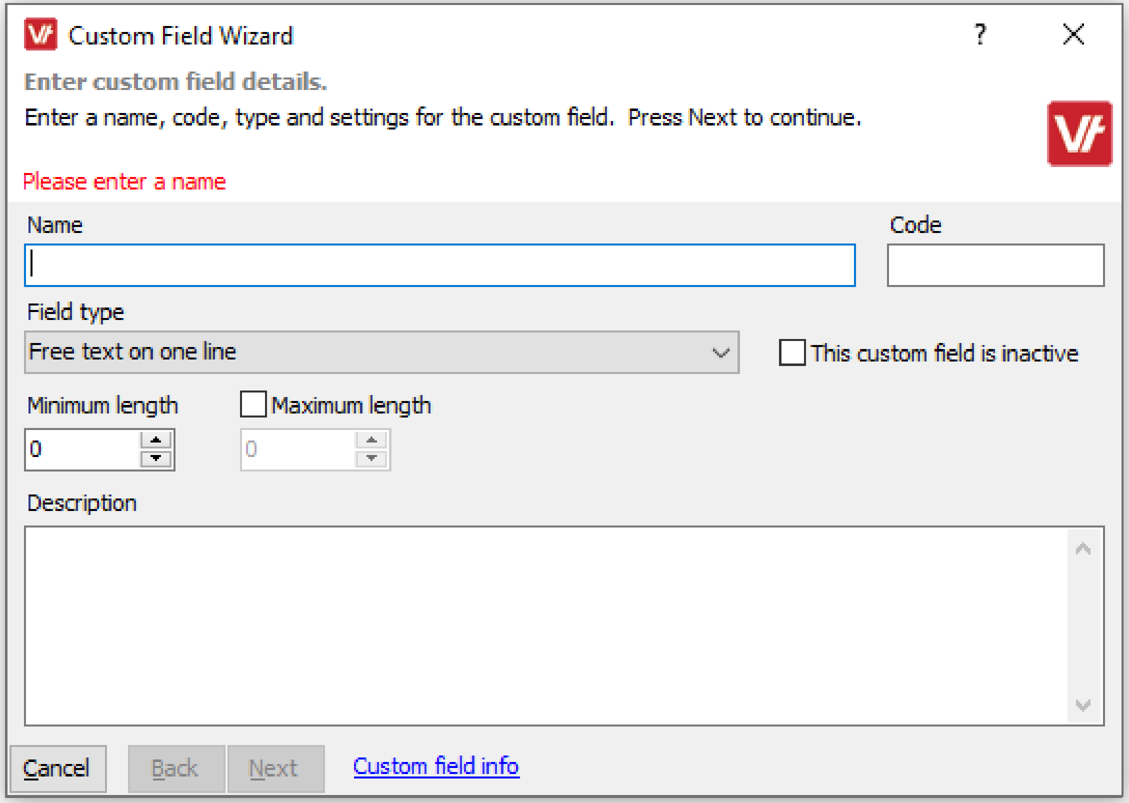
Custom Fields can be applied to a wide range of data types within **VET**trak, including:

- Client
- VET Student Loan Records
- Client award
- Client enrolment
- Contract
- Employer
- Invoice
- Occurrence
- Placement
- Qualification/Course
- Unit/Subject



Custom Fields

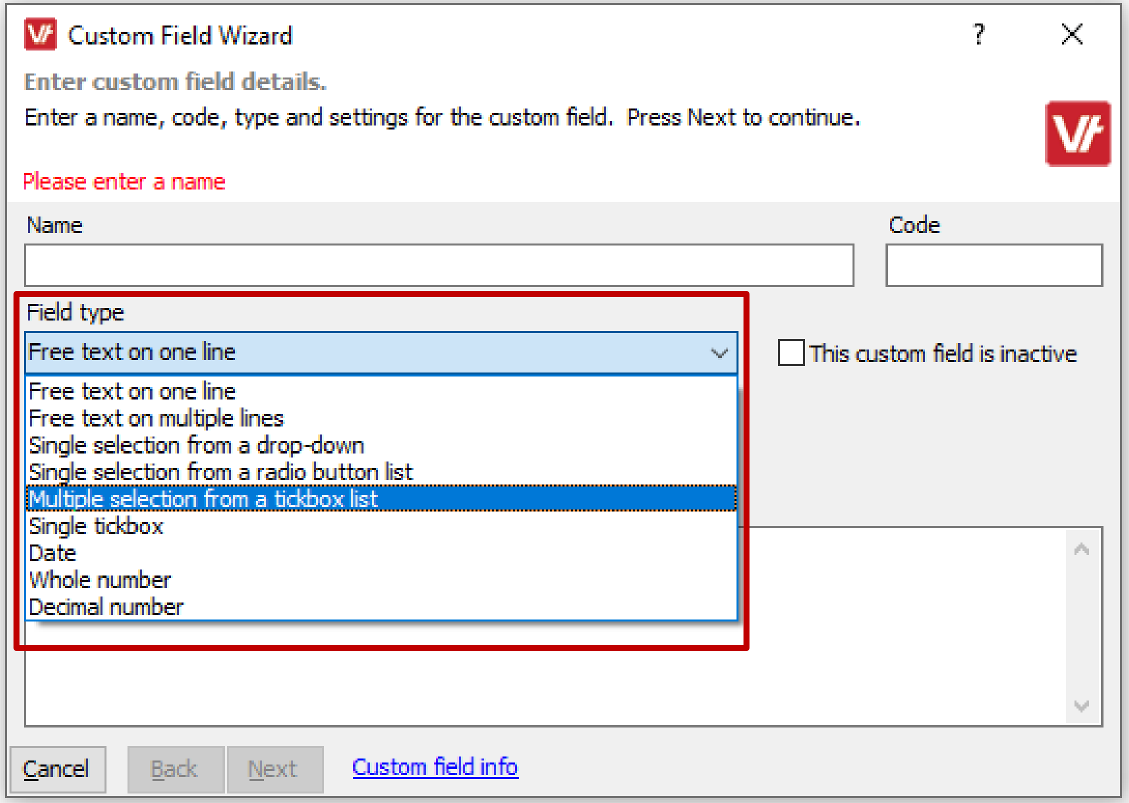
When you create a **Custom Field**, you can configure how you wish for the Data to be collected.



Custom Fields

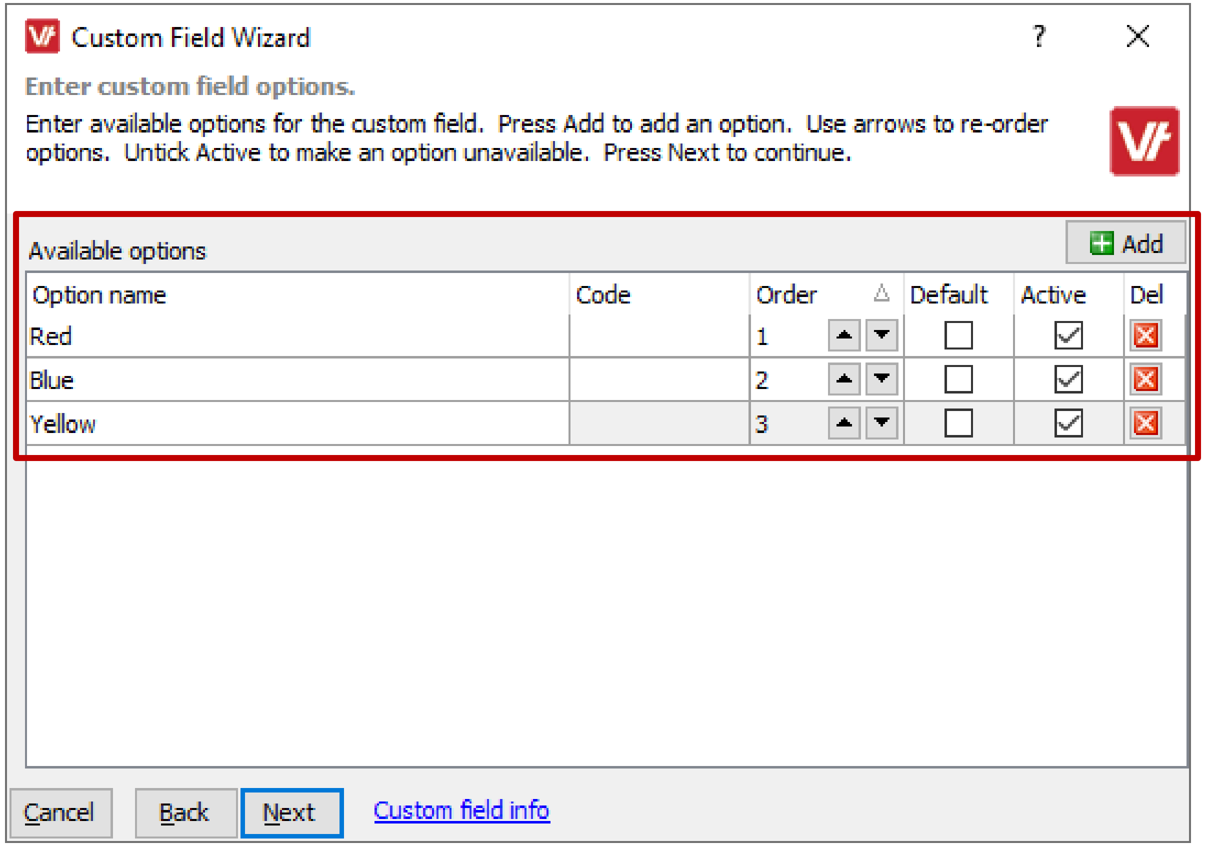
When you create a **Custom Field**, you can configure how you wish for the Data to be collected.

This is done by selecting what kind of **Field Type** will be used, which will format how the fields appears in the wizard – and what kind of input it will accept.



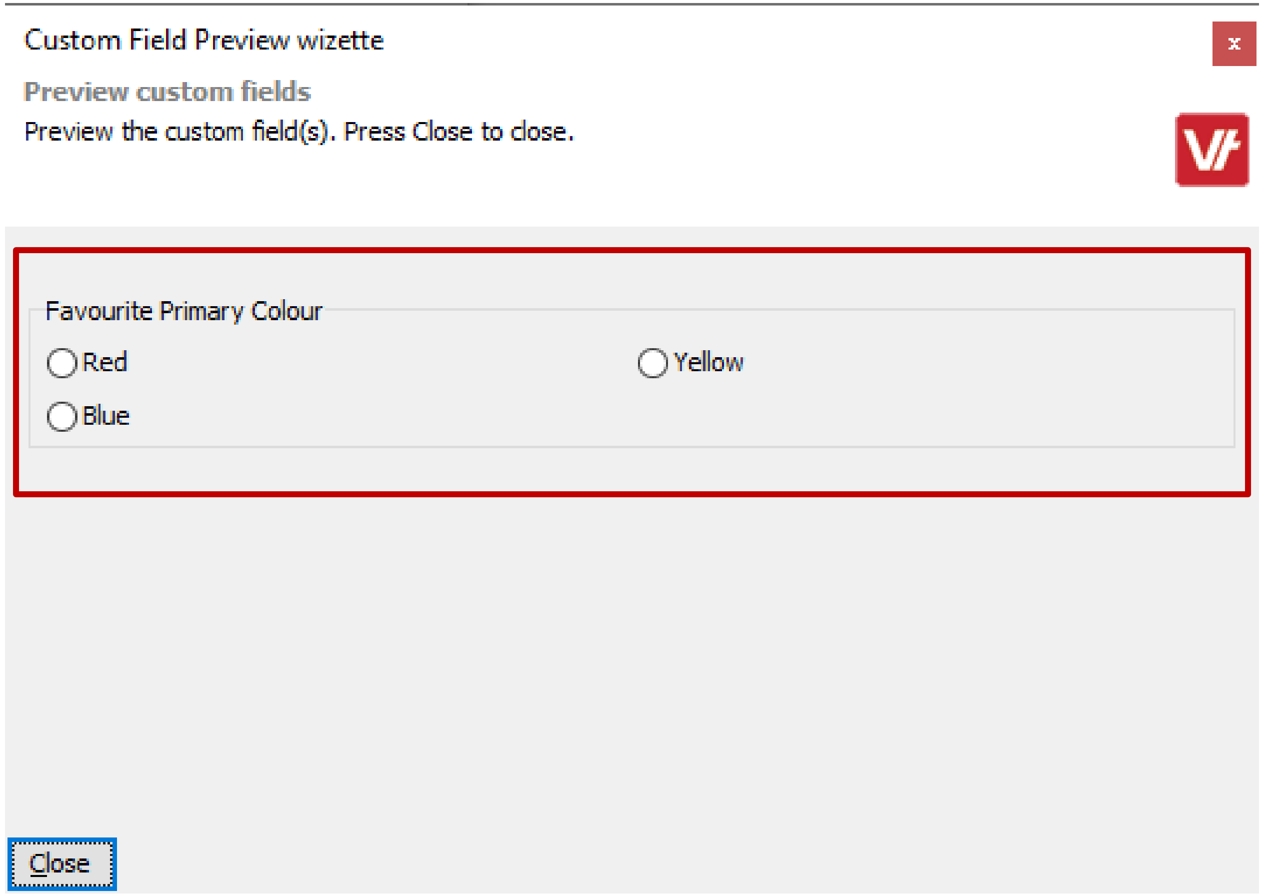
Custom Fields

There are also additional unique controls to help you configure your custom fields to include a range of pre-determined selection items if you would rather have people select from a list!



Custom Fields

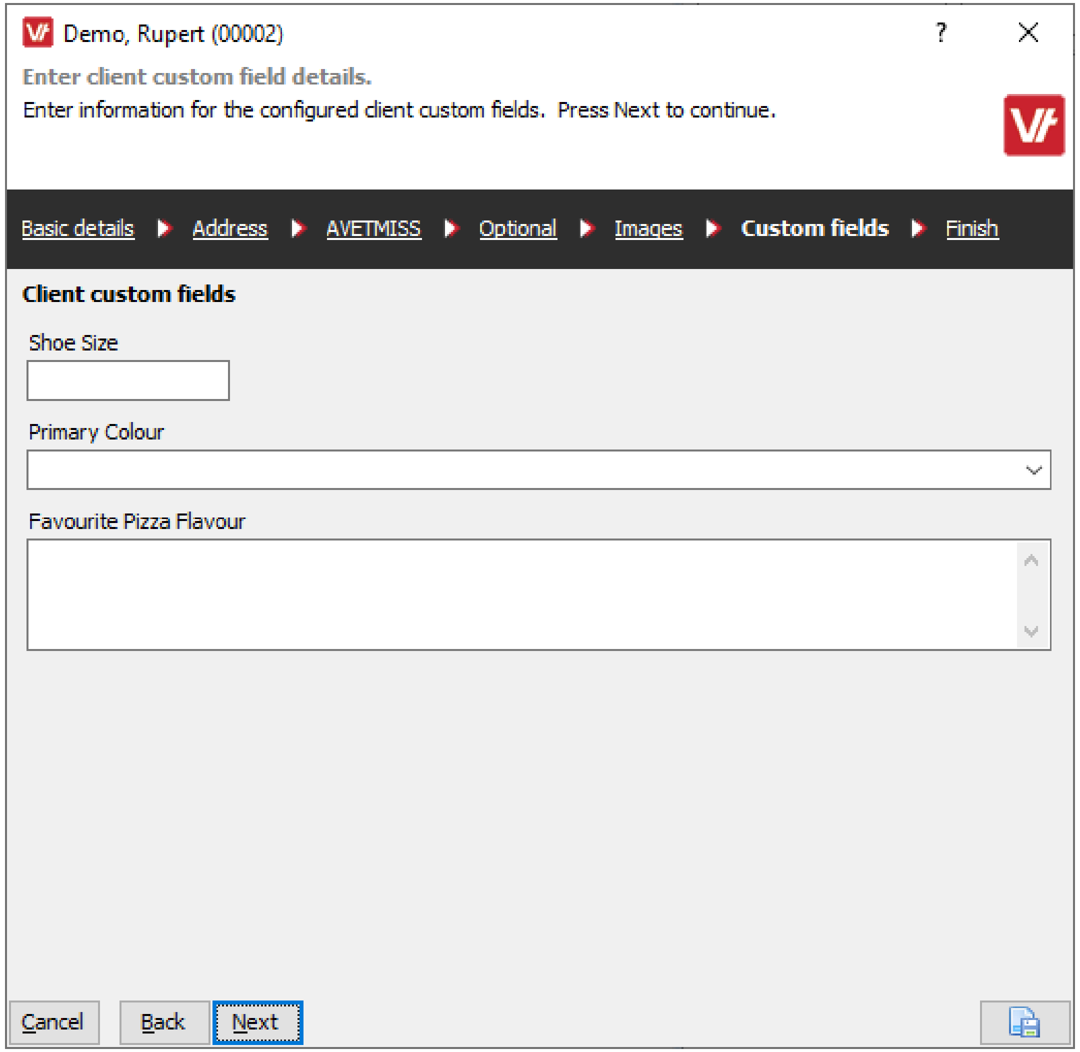
These can be configured to allow individual selections, multiple selections – or even to simply allow the user to pick from a drop-down list.



Custom Fields

This 'custom' data is then stored within your **VET**trak database and can be reviewed at your leisure.

The data can also be leveraged into **VET**trak reports – both standard and custom – to further enhance/personalise your company processes!



Let's get our hands dirty!

Here is an article that will help get your started with configuring **Custom Fields.**

VETtrak Help Centre: Custom Fields

Item:

What are

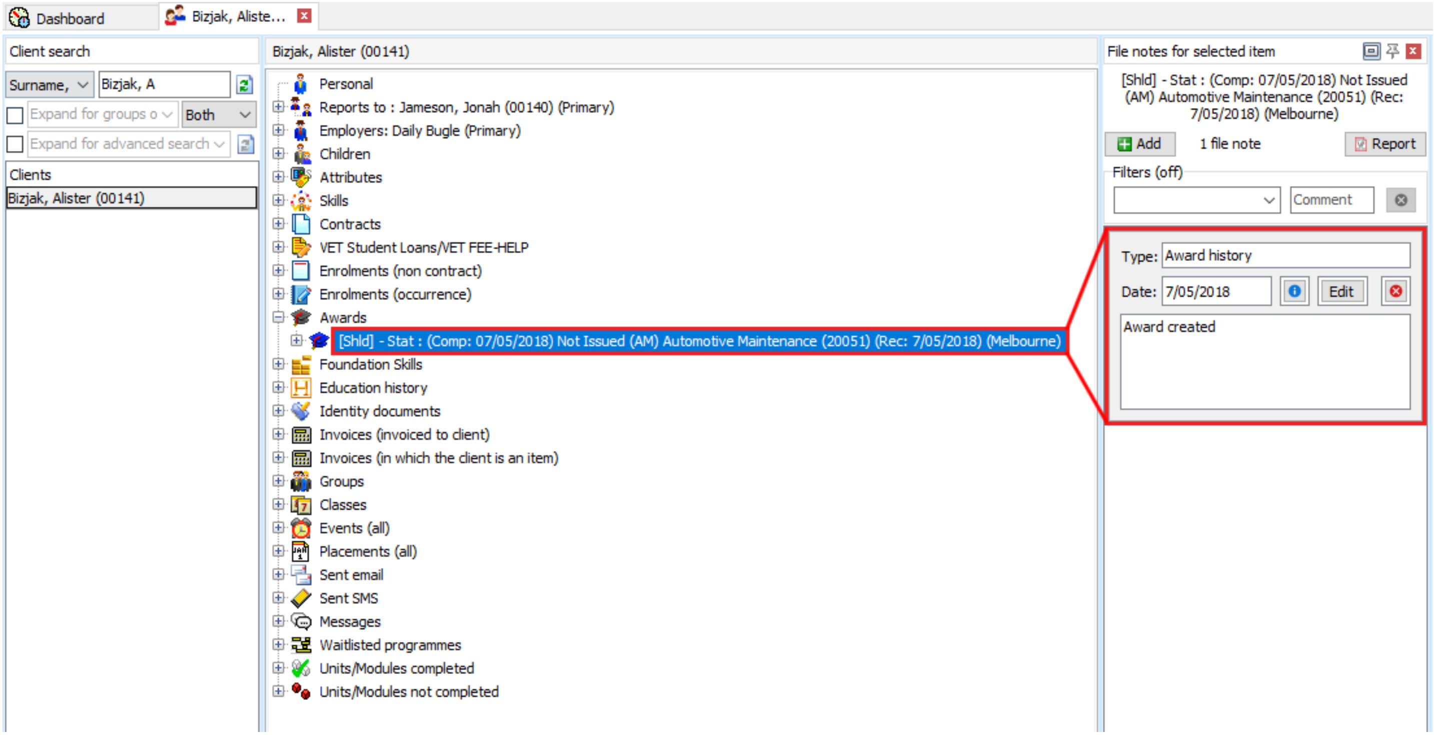
File Notes?

File Notes

File Notes are a unique way to record targeted information against entities within VETtrak.

As an example, These entities can include Student Enrolments, Awards, Invoices, Employers - even against Clients directly.

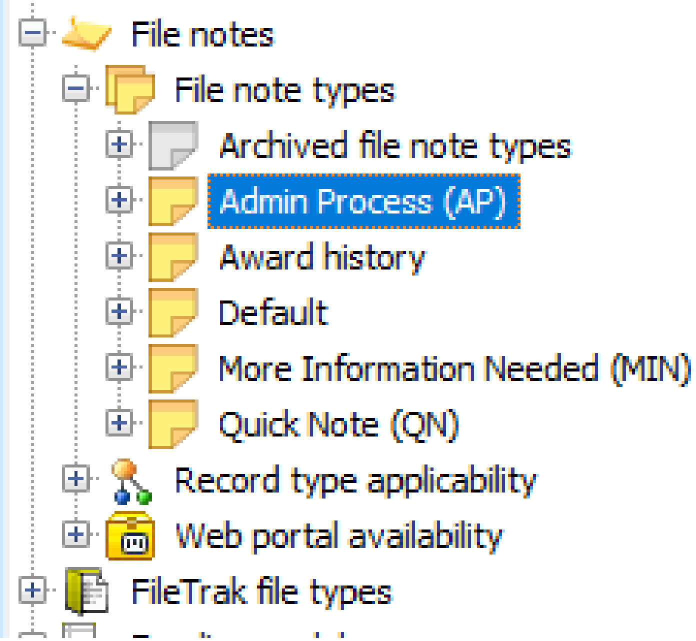
File Notes are reviewed within their own UI element within relevant managers.



File Notes

Unlike a **Description** or **Notes** field, File Notes can be recorded as individual items, and categorised by using [File Note types](#).

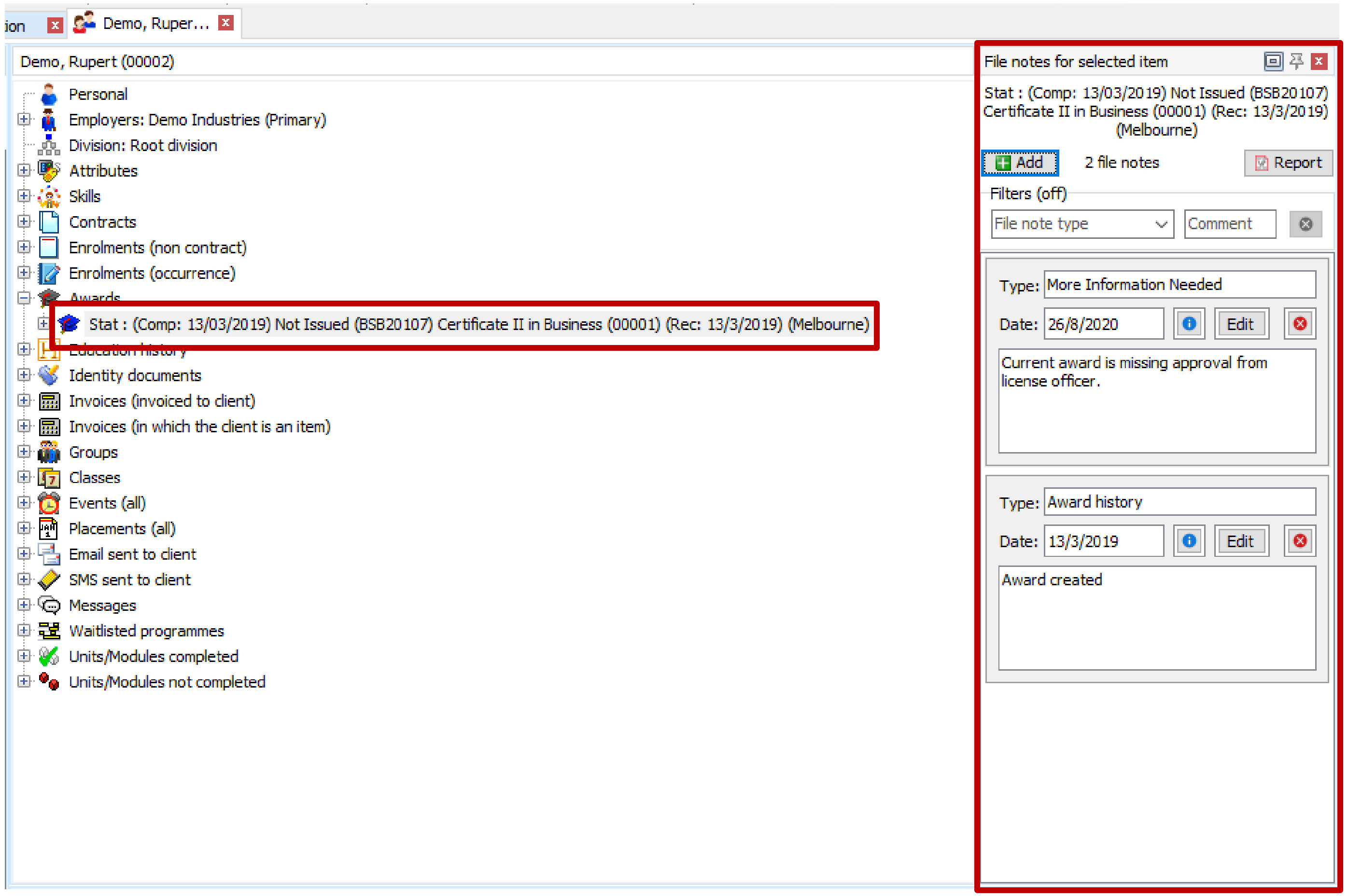
Template-style Files Notes can also be created as [Canned File Notes](#), to be quickly added as a new File Note - or appended to an existing File Note item.



File Notes

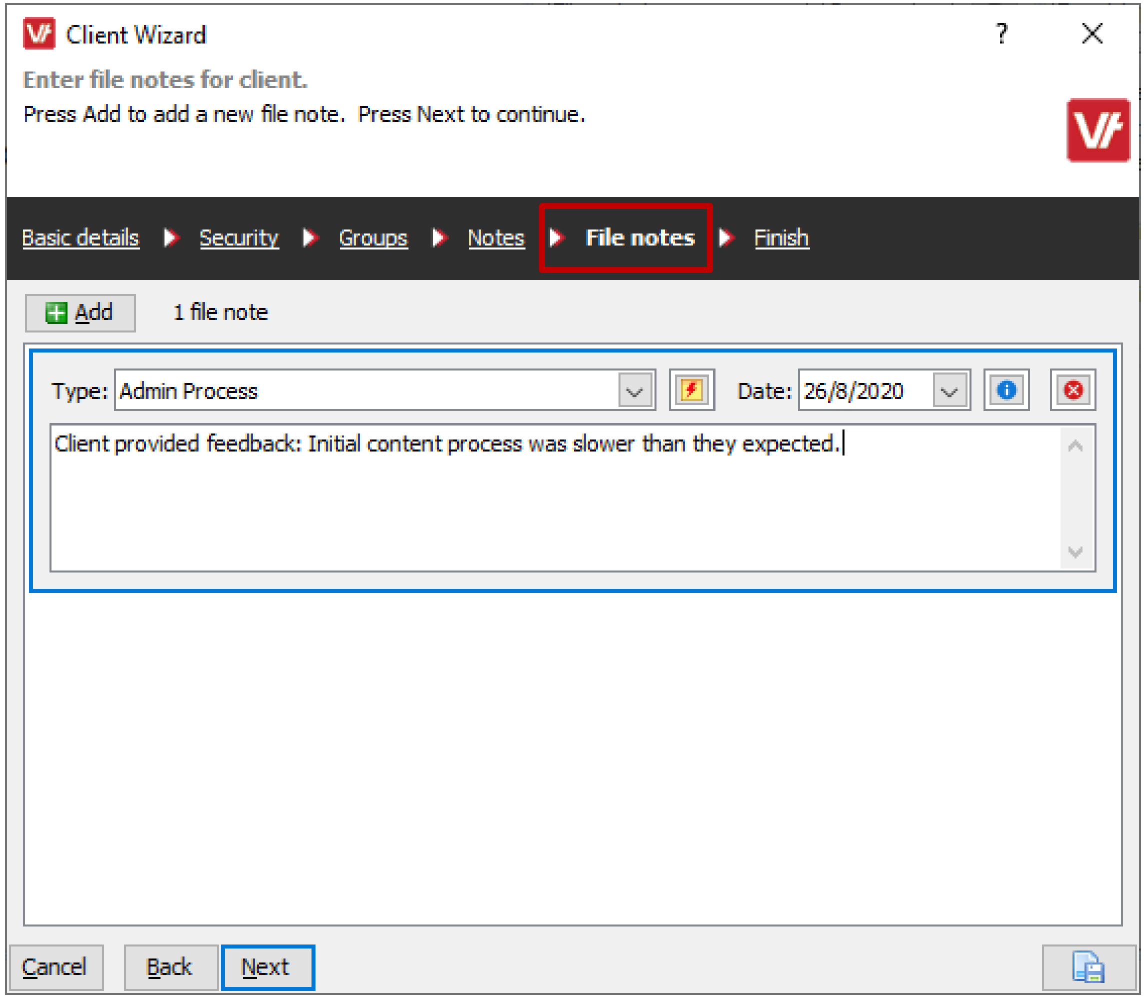
File Notes are reviewed within their own UI element, the **File Note Feed.**

This area also contains buttons to view **additional note information** (such as author and last edit date) as well as the ability to **Edit** and **Delete** a File Note.



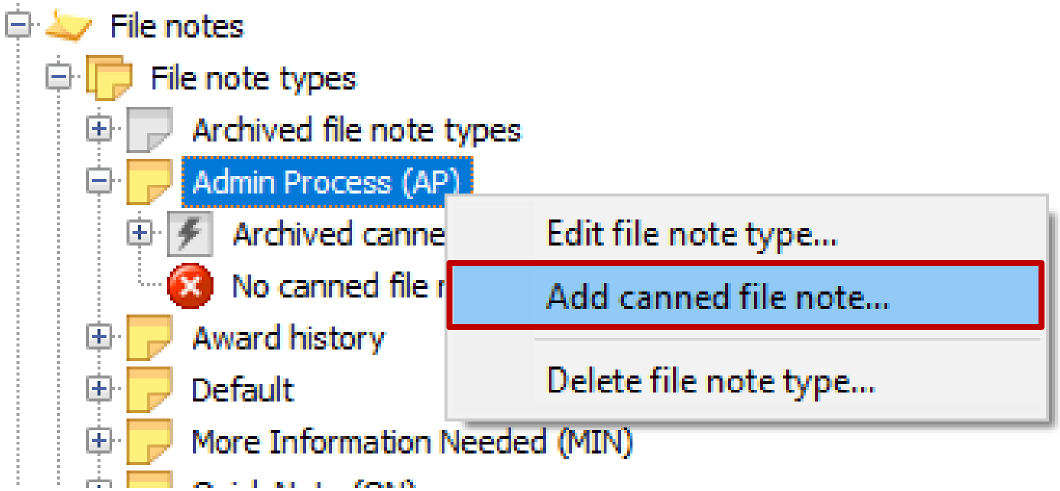
File Notes

File Notes can also be viewed / added within relevant managers – by navigating to the **File Notes** step of the wizard:



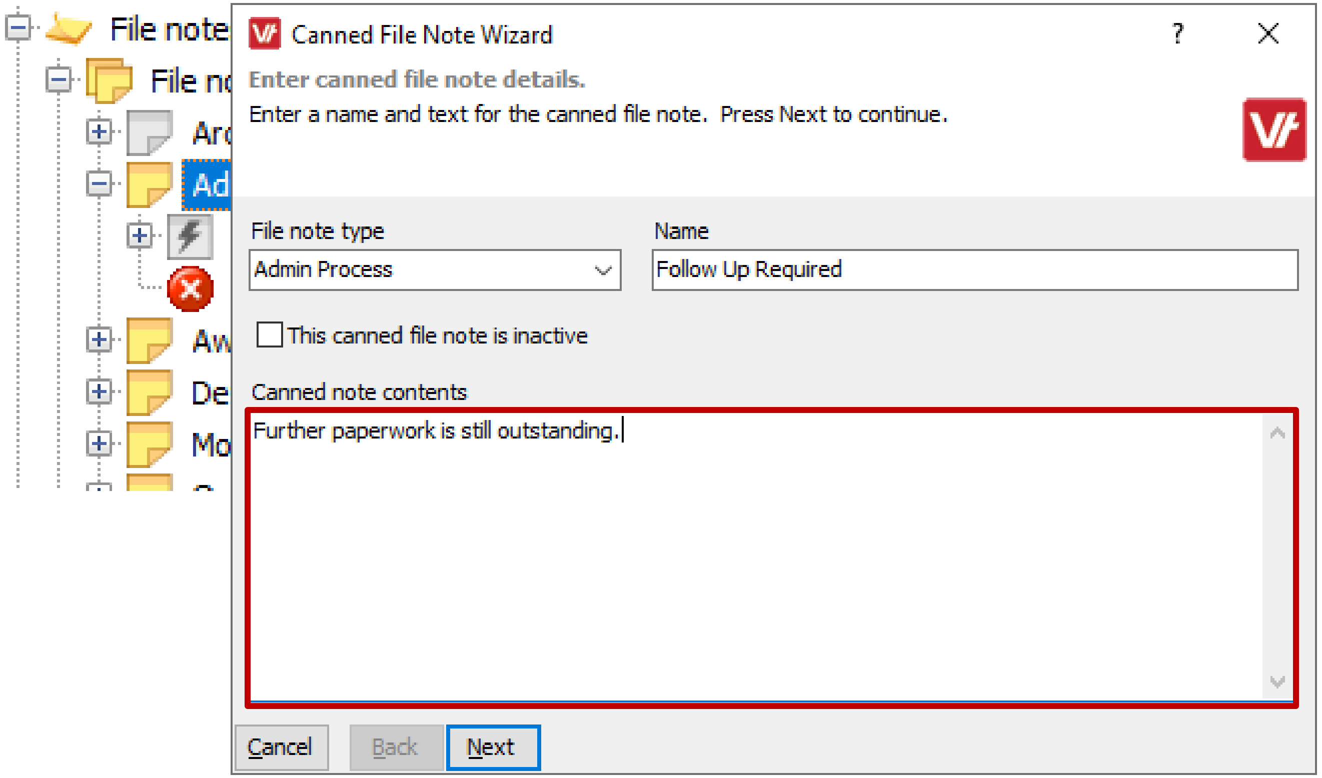
File Notes

Template style **'Canned'** File Notes can be created to quickly add common notes to your data.



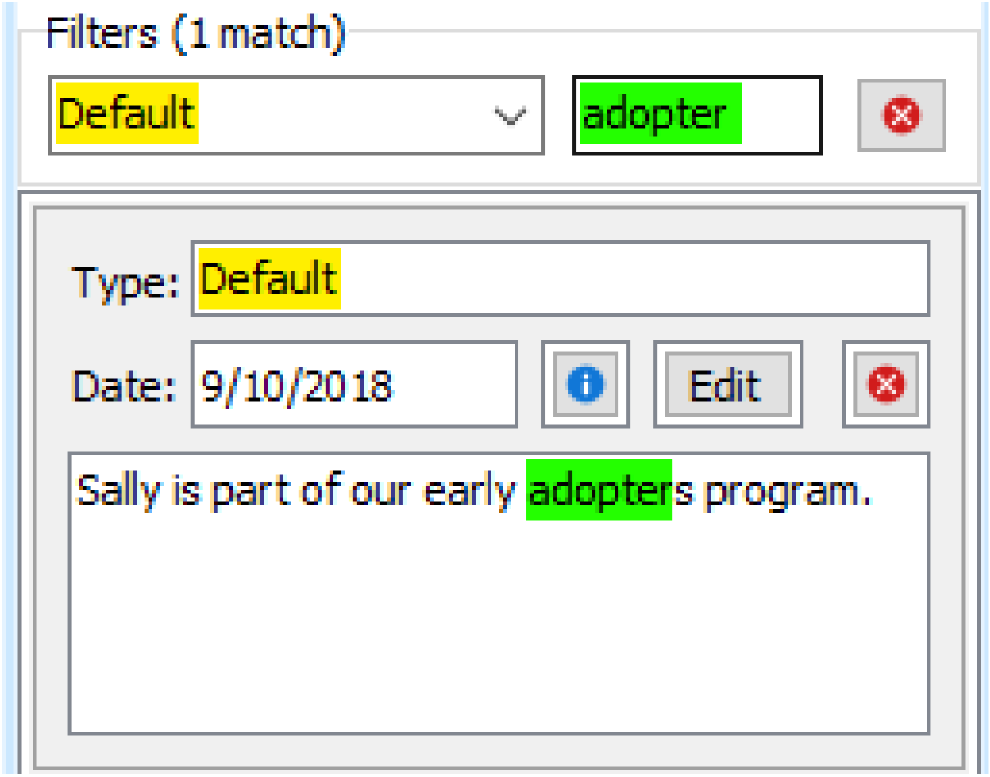
File Notes

Template style **'Canned'** File Notes can be created to quickly add common notes to your data – These can contain pre-stated text to autofill the file notes body, and may serve to help your own internal processes.



File Notes

When viewing File Notes within a manager, the File Note Feed panel actually has a range of options to filter the content of your File Notes, should you need to see specific details – working off keyword searches and configured file note types:



Let's get our hands dirty!

Here is an article that will help get your started with configuring **File Notes** ready for use.

[VETtrak Help Centre: File Notes]

Item:

That's a Wrap!

Enhancing Your VT Admin Experience

There is a massive range of additional 'Admin level' tools and functions hidden within the Config Manager.

Todays webinar has only scratched the surface!

If you get stuck!

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

- Configuration Manager Overview
- Attributes
- Custom Fields
- File Notes
- Canned File Notes