



VETtrak AcademyPlus

Getting the full picture with **Data Completions**

VETtrak. Number 1 in RTO

Welcome to VETtrak AcademyPlus!

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

We will be covering the subject through a series of modular sections that focus on the unique **Data Completions** feature of VETenrol.

Let's collaborate and learn together.



Getting the full picture with Data Completions



This session will cover:

-
1. What are **Data Completions**?
 2. How do they work?
 3. **Data Completion** settings in **VETenrol**
 4. Sending **Data Completions** from **VETtrak**
 5. Auto sending **Data Completions** from **VETenrol**
 6. **Troubleshooting**



Item:

What are Data Completions?

Data Completions

In order to streamline your data collections process for new learners, you may wish to separate the initial enrolment from the glut of required data entry.

Using the **Data Completions** functionality will allow you to quickly establish an enrolment within your VETtrak environment – quickly filling out your learner numbers – whilst then allowing your learners the opportunity to provide as much information as you require afterwards, via a simple emailed URL.



How do they work?

Effectively you can provide an opportunity for someone – either a student or staff member – to process an Enrolment into a course with only the bare minimum of information – Such as a learner name and email!

You can then action a URL to be provided to that learner via email, prompting them to access an online form to 'fill in the blanks', capturing the additional information you will require to process their learning moving forward – particularly their **AVETMISS relevant** information.





Item:
Data Completion
Settings in VETenrol

Data Completion Settings in **VETenrol**

It comes as no surprise that in order to start using **Data Completions**, you will be required to do some prior set up.

This will involve turning the appropriate preferences on to indicate that the **Data Completions** feature is intended to be used, as well as configuring **what information is to be collected via this process**.

There will also be the requirement to create an **Email Template** within **VETtrak** to easily send the form URL to your learner.

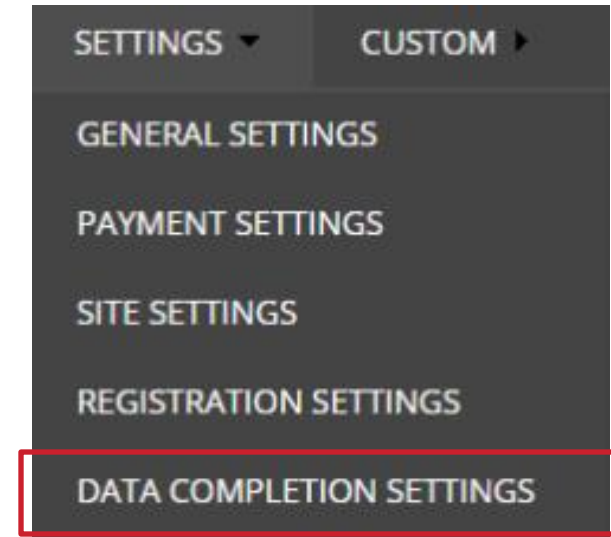


Getting the full picture with **Data Completions**



Within **VETenrol**, there is a set of configuration options entirely dedicated to **Data Completions**.

This is accessed via the **Settings** menu, with the option simply titled **Data Completion Settings**:



Getting the full picture with Data Completions



This settings page will display a range of options, including:

- **Introduction Text**
This text will be displayed at the start of the data entry form, shown to your learner.
- **Completion Text**
This box controls the text displayed to the learner upon completing the form.
- **Mandatory Steps**
Toggle the entry of a signature from your learner.
- **Registration Steps**
Toggle what information gathering details are to be enabled, particularly noting what information you require from your learner.

DATA COMPLETION SETTINGS

Introduction Text

Heading:

Text:

Completion Text

Heading:

Text:

Mandatory Steps

Signature Pad: ☐ Require Signature Pad?

Registration Steps

Gender: ☐ Force Collection of Gender?

Contact Details: ☐ Require Contact Details?

☐ Populate address details?

☐ Hide Postal Address entry?

☐ Hide Home Phone entry?

☐ Hide Work Phone entry?

☐ Hide Mobile Phone entry?

☐ Force collection of Emergency Contact details?

☐ Hide Emergency Contact entry?

☐ Hide Citizenship entry?

☐ Enable Preferred Contact Method?

☐ Do not force collection of email address?

☐ Force email confirmation?

☐ Collect secondary email address?

USI Step: ☐ Require USI?

☐ Force collection of USI?

AVETMISS Step: ☐ Require AVETMISS data?

☐ Force collection of Country of Birth?

☐ Collect Town of Birth?

☐ Force Collection of Town of Birth?

☐ Force collection of Language Spoken?

☐ Collect English Proficiency?

☐ Disable forced collection of Indigenous Status?

☐ Force collection of highest school level?

☐ Disable forced collection of Year Completed?

☐ Force collection of secondary school status?

☐ Disable collection of Prior Qual Name & Year?

☐ Disable collection of Prior Education Recognition?

☐ Force collection of Prior Education Recognition?

☐ Hide AVETMISS file upload?

☐ Force collection of Employment Status?

☐ Force collection of length of employment?

☐ Collect length of unemployment?

Save

Let's take a closer look!

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

- [Using the Data Completion feature](#)





Item:
Sending

Data Completions from VETtrak

Sending Data Completions from VETtrak

Sending a data completion request is super simple within VETtrak, making use of existing Email functionality to create a **template** that can be easily emailed to **individuals**, **bulk** sent to a **group** or even configured to work with a **Trigger**!



Getting the full picture with Data Completions



Sending a Data Completion URL

You can retrieve your **Data Completion URL** from the [Links](#) menu within **VETenrol**, allowing you to prepare an [Email Template](#) to easily send it to your learners.

This is a **dynamic** URL, meaning that if you have set it up correctly – it will *just work* when you send it out!

The screenshot shows the 'Merge Template Wizard' window. It has a title bar with the VETenrol logo and standard window controls. The main area is titled 'Enter merge template details.' and contains several sections. At the top, there are dropdowns for 'Type' (set to 'Email message'), 'Context' (set to 'Occ enrolment'), and 'Name' (set to 'VETenrol Data Collection'). Below these are fields for 'Code', 'Template category', and 'Notes'. A checkbox 'This template is not active' is also present. The 'Subject' field contains 'Finalise enrolment information'. There are fields for 'CC address' and 'BCC address', each with an 'Add' button. A rich text editor is in the center, showing a draft email starting with 'Dear {Given},', followed by a paragraph about collecting enrolment information, a blue hyperlink, and 'Regards,'. To the right of the editor is a 'Field list (for type and context)' containing a table of fields and their names. At the bottom, there is a 'File attachments' section with a table for 'File path and name', 'Display name', and 'Del'. A note at the very bottom states: 'Note: All attachment file paths here must exist whenever emails are sent using the template.' Navigation buttons 'Cancel', 'Back', and 'Next' are at the bottom left.

Let's take a closer look!

Here are some articles that will help you with sending **Data Completions** from **VETtrak** via email – Including using **Triggers&Actions** to streamline the process:

- [Creating Email Templates](#)
- [Triggers and Actions Overview](#)



The background of the slide is a red-tinted photograph of a person's hands holding a piece of light-colored paper. The person is wearing a watch on their left wrist. The text is overlaid on the left side of the image.

Item:
Auto sending

Data Completions from VETenrol

Auto sending Data Completions from VETenrol

If you would prefer to streamline the majority of your enrolment process from within the **VETenrol** environment, you can do so by automating the sending of Data Completions on the **VETenrol** side of things – reducing the need to manage specific learner contact from within **VETtrak** itself.

This will incorporate the **Rapid Registrations** functionality of **VETenrol** to show just how quick it can be!

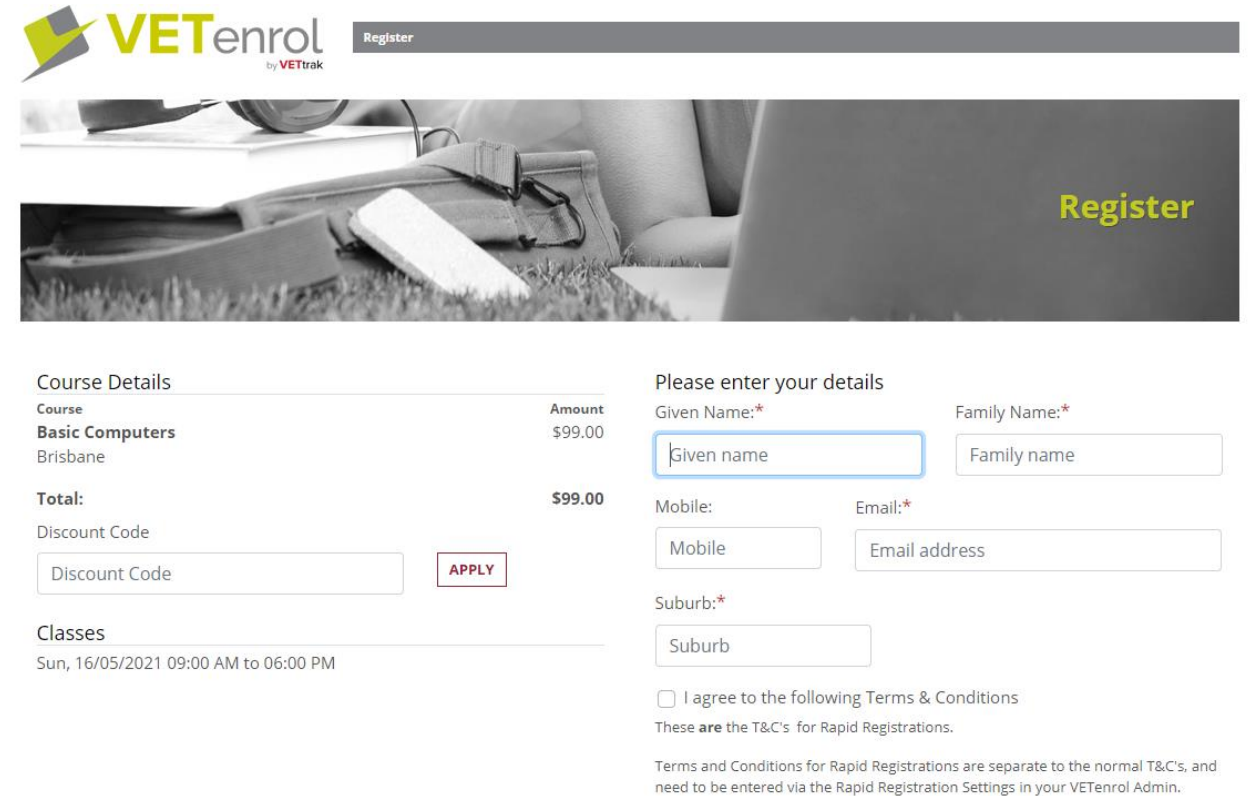


Getting the full picture with Data Completions



Utilising the **Rapid Registrations** functionality of **VETenrol** is a brilliant method to ensure that your online enrolments are handled in the most efficient manner possible – Getting learners into your **VETtrak** system as quickly as possible.

As a side note, **Data Completions** also works exceptionally well with **Group Bookings** - However we will be showcasing an individual as the example today.



The screenshot shows the VETenrol registration interface. At the top, there's a header with the VETenrol logo (a green and yellow square icon followed by 'VETenrol by VETtrak') and a 'Register' button. Below the header is a banner image of a laptop on grass with the word 'Register' in yellow. The main form is divided into two columns. The left column, titled 'Course Details', shows 'Course: Basic Computers Brisbane' with an 'Amount' of '\$99.00'. Below this, a 'Total:' section shows '\$99.00'. There's a 'Discount Code' field with an 'APPLY' button. The 'Classes' section shows 'Sun, 16/05/2021 09:00 AM to 06:00 PM'. The right column, titled 'Please enter your details', has fields for 'Given Name:*' (with a placeholder 'Given name'), 'Family Name:*' (with a placeholder 'Family name'), 'Mobile:' (with a placeholder 'Mobile'), 'Email:*' (with a placeholder 'Email address'), and 'Suburb:*' (with a placeholder 'Suburb'). At the bottom, there's a checkbox for 'I agree to the following Terms & Conditions' and a note that 'These are the T&C's for Rapid Registrations.' and 'Terms and Conditions for Rapid Registrations are separate to the normal T&C's, and need to be entered via the Rapid Registration Settings in your VETenrol Admin.'

VETenrol by VETtrak Register

Register

Course Details

Course	Amount
Basic Computers Brisbane	\$99.00

Total: \$99.00

Discount Code **APPLY**

Classes
Sun, 16/05/2021 09:00 AM to 06:00 PM

Please enter your details

Given Name:* Family Name:*

Mobile: Email:*

Suburb:*

☐ I agree to the following Terms & Conditions
These **are** the T&C's for Rapid Registrations.

Terms and Conditions for Rapid Registrations are separate to the normal T&C's, and need to be entered via the Rapid Registration Settings in your VETenrol Admin.

Let's take a closer look!

Let's take a closer look at auto sending **Data Completions**, **Rapid Enrolments** and **Registration Receipts** from within VETenrol.

- [Rapid Registrations Overview](#)
- [Email Templates](#)
- [Registration Receipts](#)





Item:

Troubleshooting

They are a couple of common hurdles that can arise when attempting to make use of **Data Completions**.

These are quite simple to fix, once you are aware of where the issue may be occurring!



Getting the full picture with Data Completions

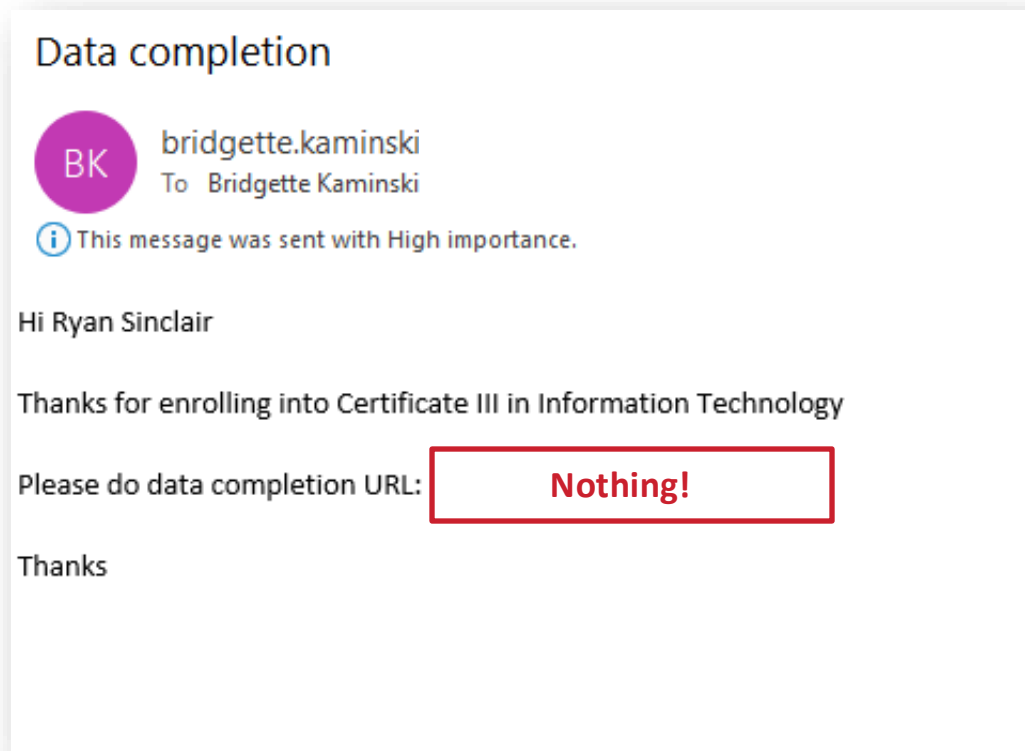


Problem:

When auto-sending from **VETenrol**, client is **not** receiving a URL in their email.

Solution:

Check that you have enabled auto-processing! Data Completions require a **client ID**, and any student that has not been auto-processed **will not have one!**



Getting the full picture with Data Completions



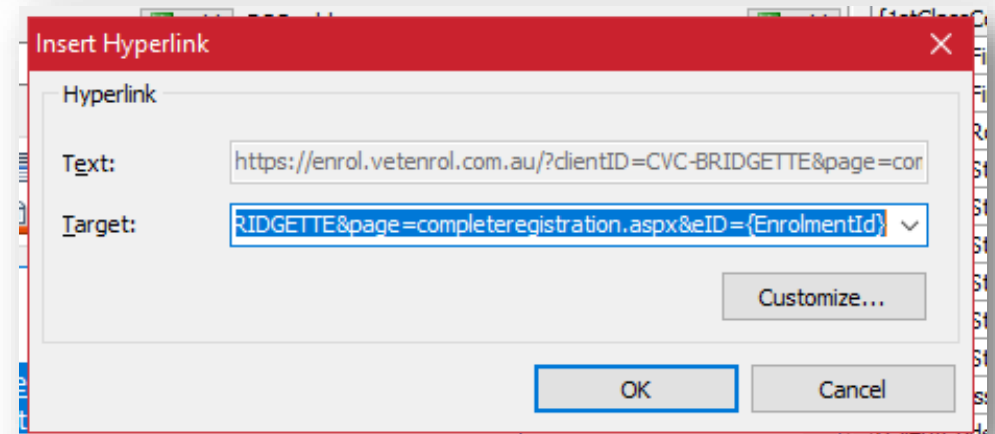
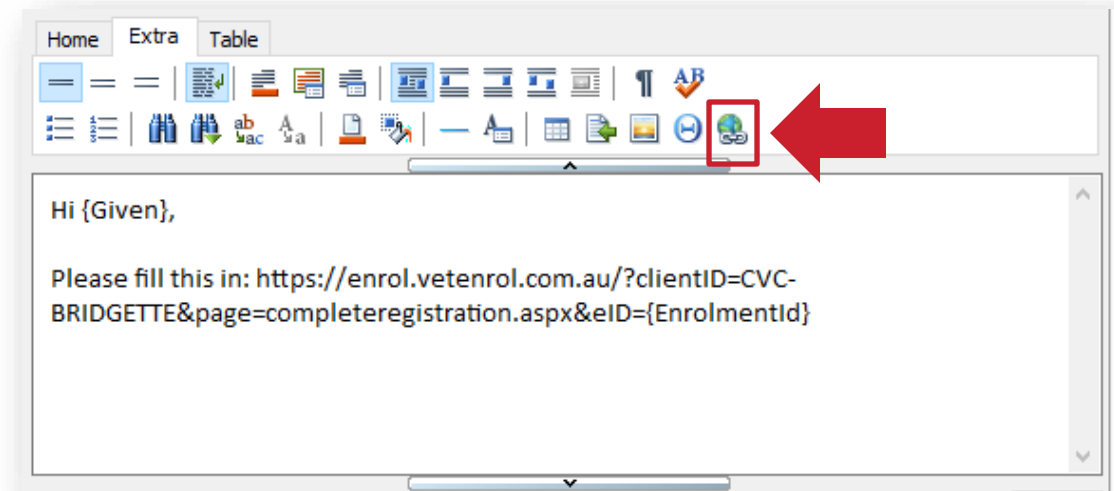
Problem:

The URL within your **VETtrak** email template is not working!

Solution:

Make sure that when you implement your Data Completions URL within your **Email Template**, that it has been correctly configured as a **Hyperlink**!

Note: Use the 'INSERT HYPERLINK' option to be sure!





Item:
That's a Wrap!

Getting the full picture with **Data Completions**



Once all the moving parts of **Data Completions** are set up and in place, you can reap the benefits of having a super-efficient, client-driven data entry procedure!

If you get stuck!



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

- [Using the Data Completion Feature](#)
- [Client Data Completions](#)
- [Client Data Completion Details](#)
- [Data Completion Settings](#)
- [Rapid Registrations Overview](#)
- [Rapid Registration Settings](#)