



VETtrak AcademyPlus

Enhancing Your VT Admin Experience (Part 1)

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 features within the VETtrak Configuration manager, providing opportunities for questions throughout.

Let's collaborate and learn together.



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:

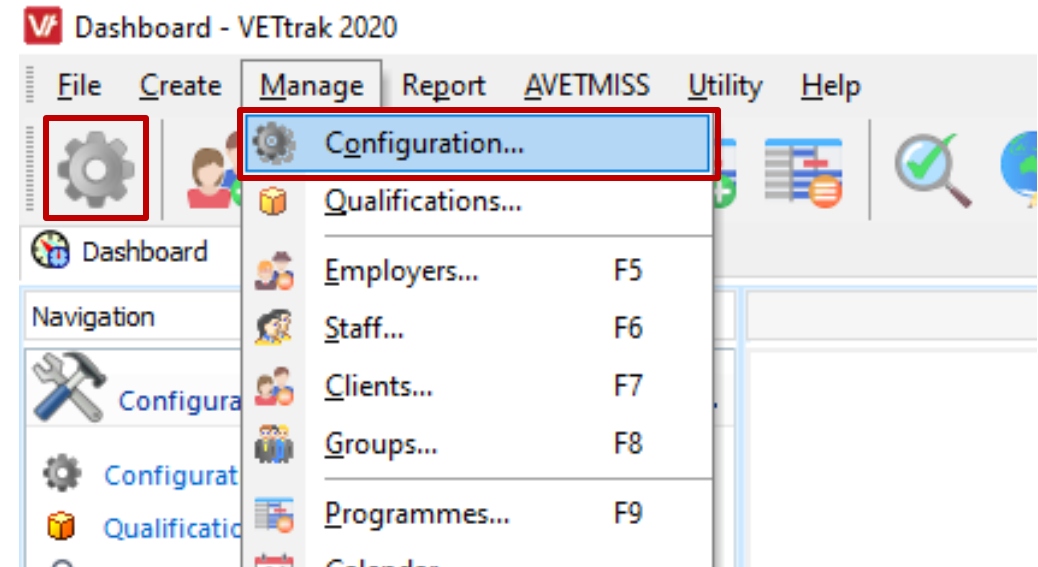
Welcome to

The Configuration Manager!

The Configuration Manager

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

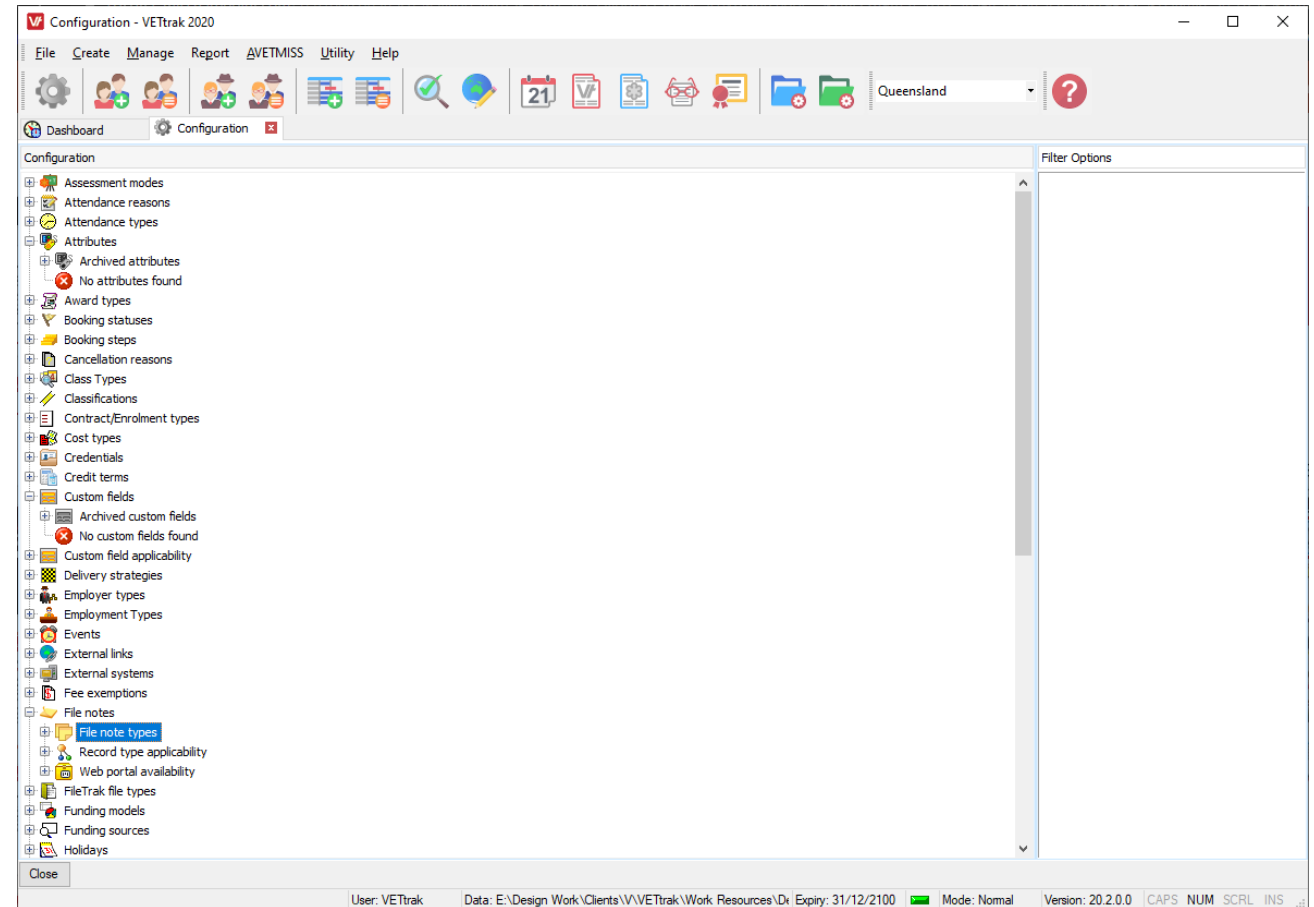
You can access the Config Manager at any time by pressing the **Cog** icon, either on the **Quick-Launch** bar or under the **Manage** menu.



Enhancing Your VT Admin Experience



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

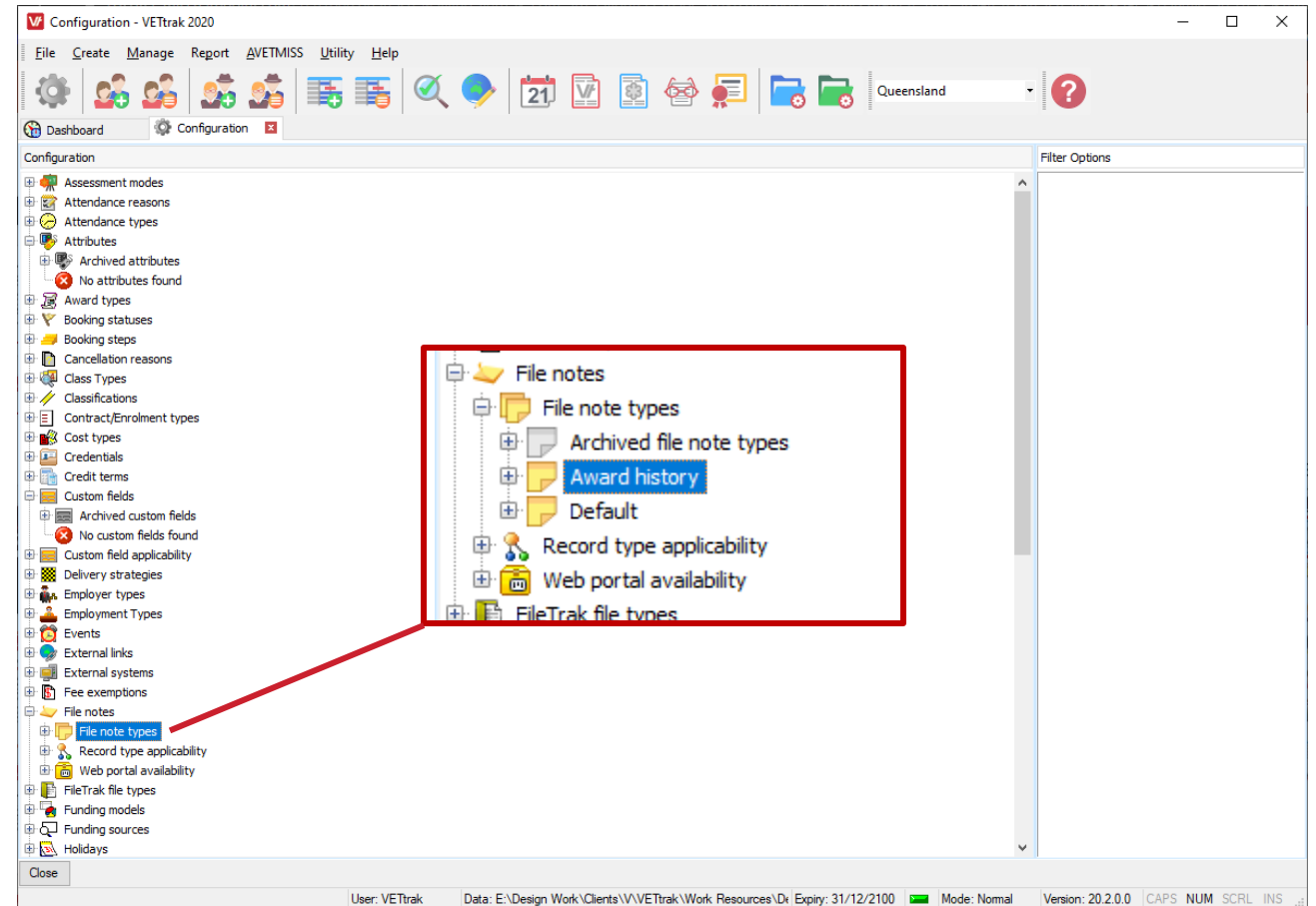


Enhancing Your VT Admin Experience



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

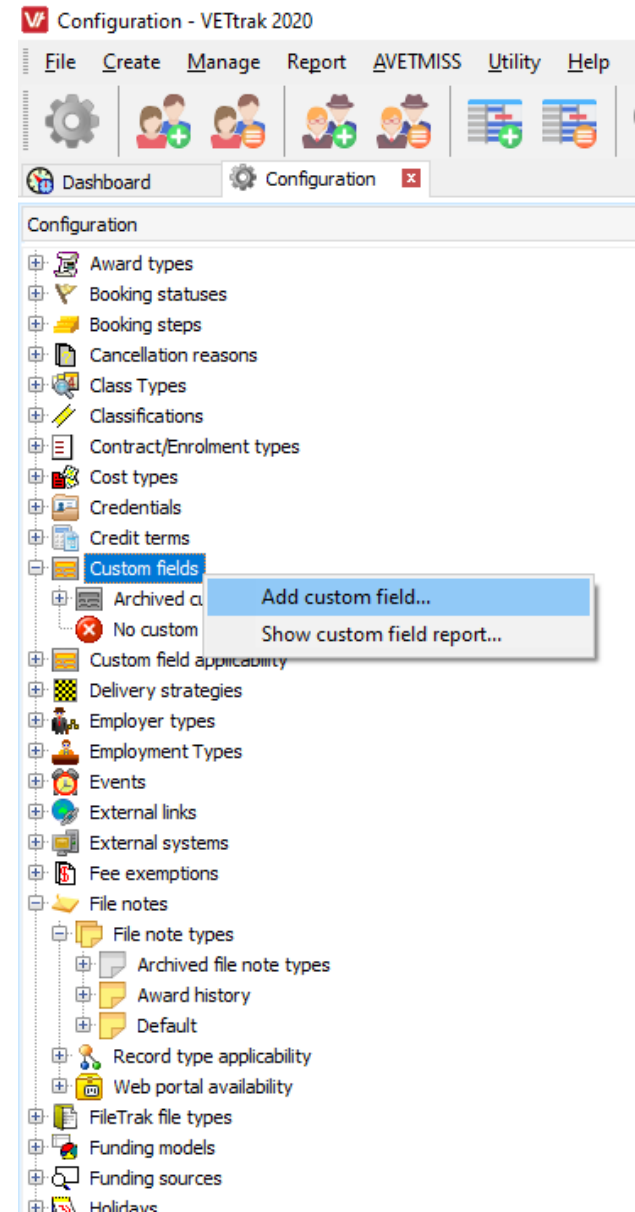


How does it work?

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!**



The background is a top-down view of numerous small potted succulents, including various types of Echeveria, Sedum, and Sempervivum, arranged on a light-colored surface. The entire image is overlaid with a semi-transparent red filter.

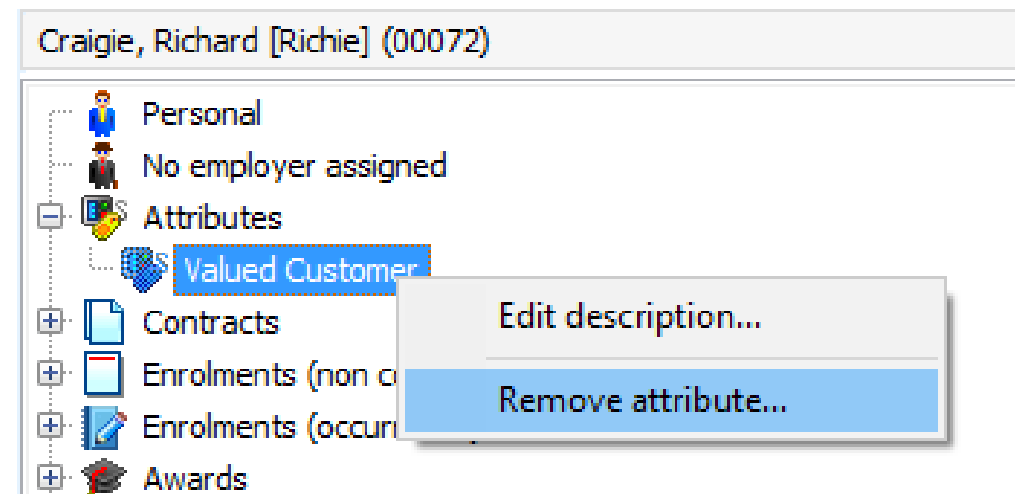
Item:
What are
Attributes?

Attributes

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

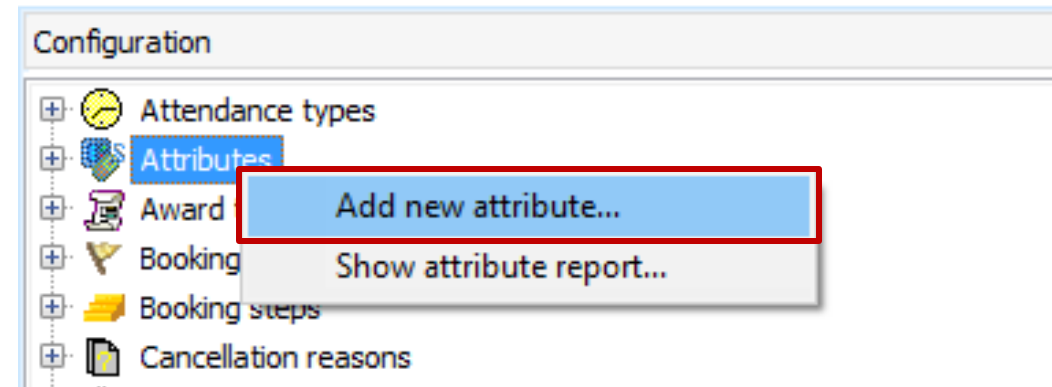
They are commonly used as a 'tagging' mechanism so you can identify certain clients or employers via a particular attribute. This is most useful when you want to record whether a student (or employer) has, or does not have a particular trait or 'thing'.

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.

 Attribute Wizard

×



Enter attribute details.

Enter a name for the attribute and an optional description. Press Next to continue.

Must have an attribute name

Name

Code

☐ This attribute is inactive

☐ This attribute is important

[Info](#)

Alerts

Record type

Add

Client enrolment

☐

Client occurrence enrolment

☐

Employer occurrence enrolment

☐

Employee occurrence enrolment

☐

Invoice

☐

Payment

☐

Client award

☐

Description

Cancel

Back

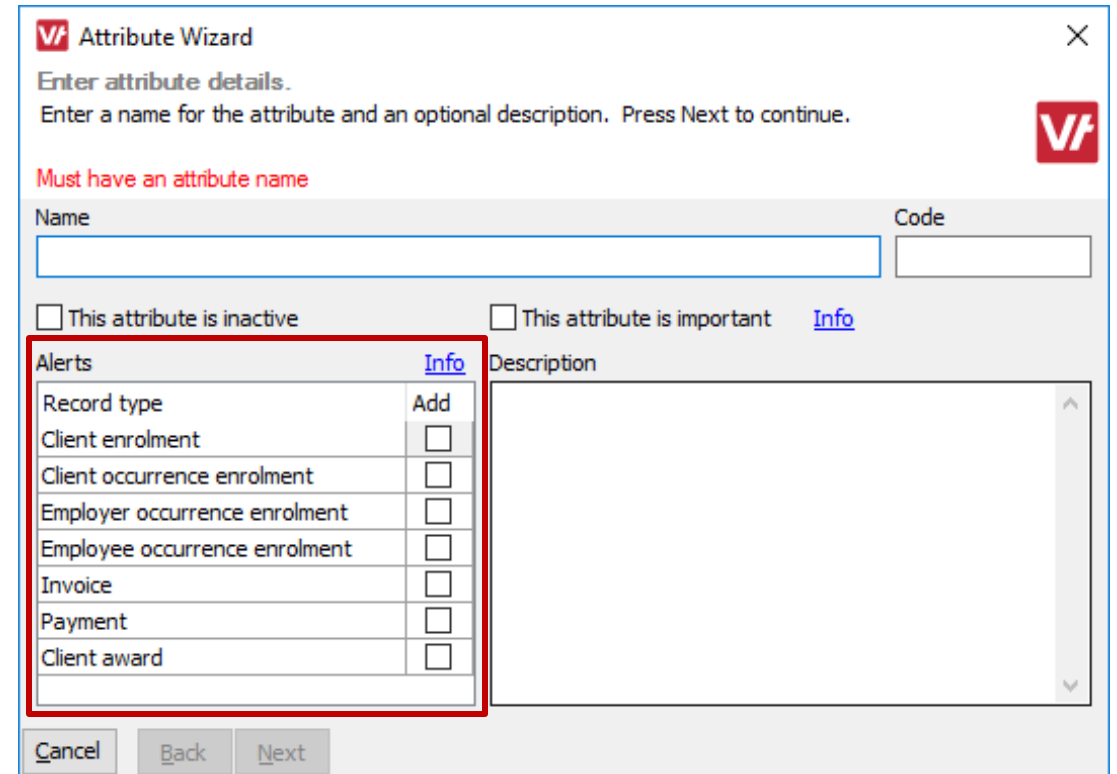
Next

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 **VETtrak** wizard for the person/company that is flagged with the attribute.



VF Attribute Wizard

Enter attribute details.
Enter a name for the attribute and an optional description. Press Next to continue.

Must have an attribute name

Name Code

☐ This attribute is inactive ☐ This attribute is important [Info](#)

Record type	Add
Client enrolment	<input type="checkbox"/>
Client occurrence enrolment	<input type="checkbox"/>
Employer occurrence enrolment	<input type="checkbox"/>
Employee occurrence enrolment	<input type="checkbox"/>
Invoice	<input type="checkbox"/>
Payment	<input type="checkbox"/>
Client award	<input type="checkbox"/>

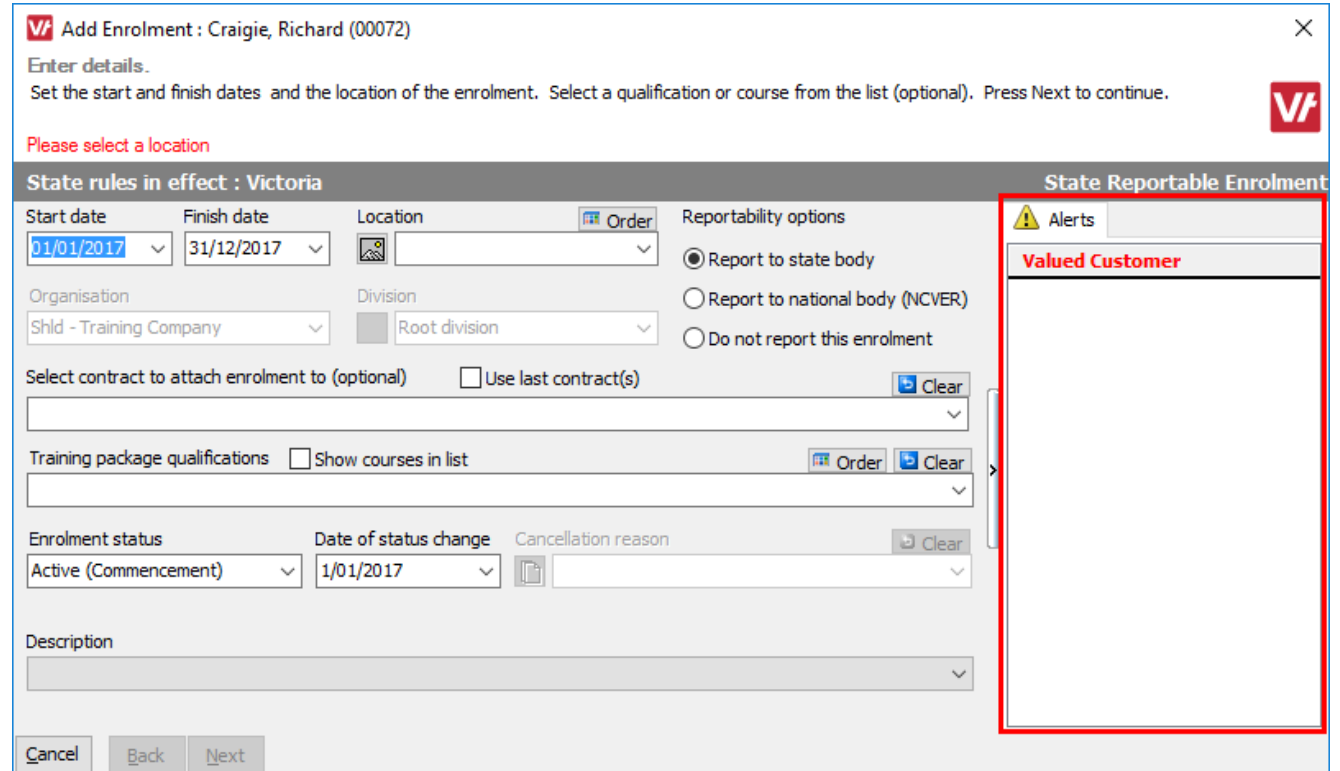
[Info](#)

Description

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 **VETtrak** users, mid-process.



The screenshot shows the 'Add Enrolment' form for Craigie, Richard (00072). The form is titled 'Add Enrolment : Craigie, Richard (00072)' and includes a 'VF' logo. The main heading is 'Enter details.' with a sub-instruction: 'Set the start and finish dates and the location of the enrolment. Select a qualification or course from the list (optional). Press Next to continue.'

The form is divided into two main sections: 'State rules in effect : Victoria' and 'State Reportable Enrolment'.

State rules in effect : Victoria

- Start date:** 01/01/2017
- Finish date:** 31/12/2017
- Location:** [Image icon] [Dropdown menu]
- Reportability options:**
 - ☒ Report to state body
 - ☐ Report to national body (NCVER)
 - ☐ Do not report this enrolment
- Organisation:** Shld - Training Company
- Division:** Root division
- Select contract to attach enrolment to (optional):** [Dropdown menu] ☐ Use last contract(s) [Clear button]
- Training package qualifications:** [Dropdown menu] ☐ Show courses in list [Order button] [Clear button]
- Enrolment status:** Active (Commencement)
- Date of status change:** 1/01/2017
- Cancellation reason:** [Image icon] [Dropdown menu] [Clear button]
- Description:** [Text area]

State Reportable Enrolment

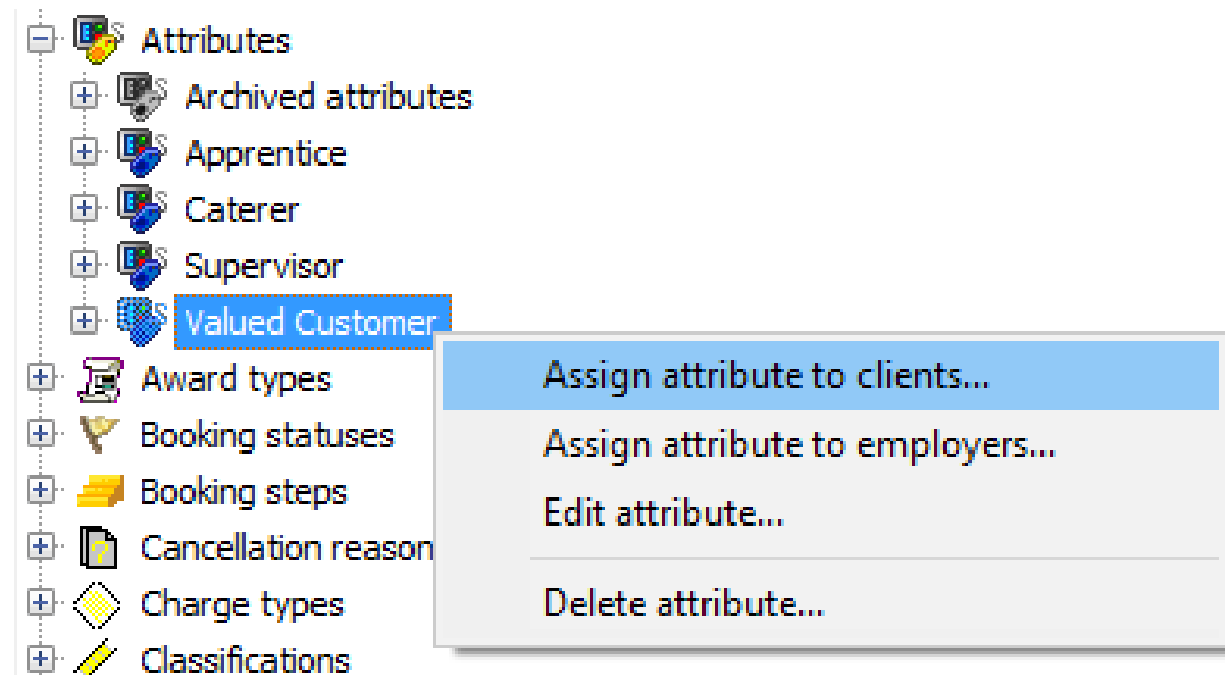
- Alerts:** [Warning icon] Alerts
- Valued Customer:** [Text area]

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

Attributes

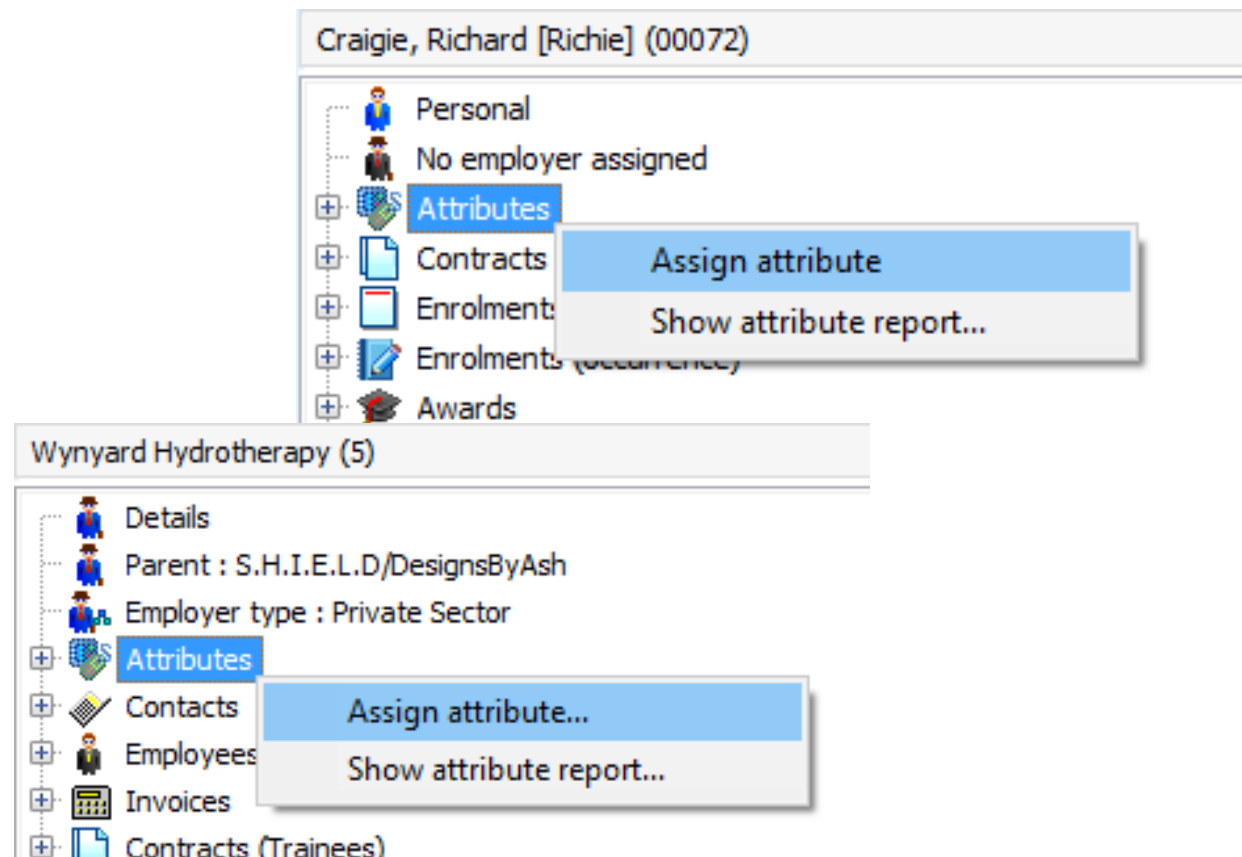
There are also multiple methods to assign Attributes.

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



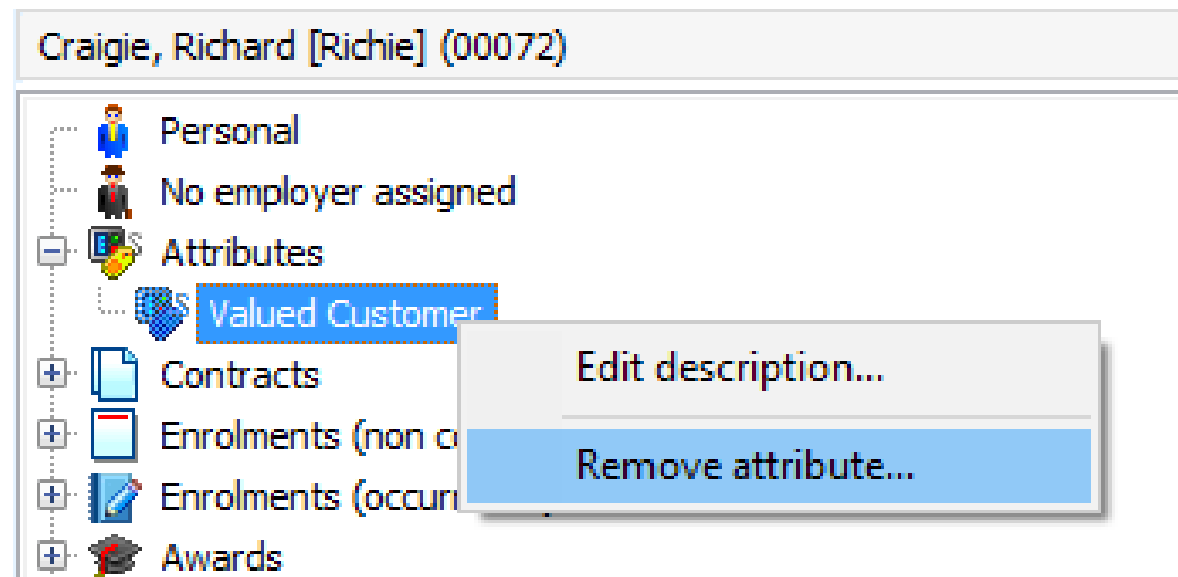
Attributes

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](#)





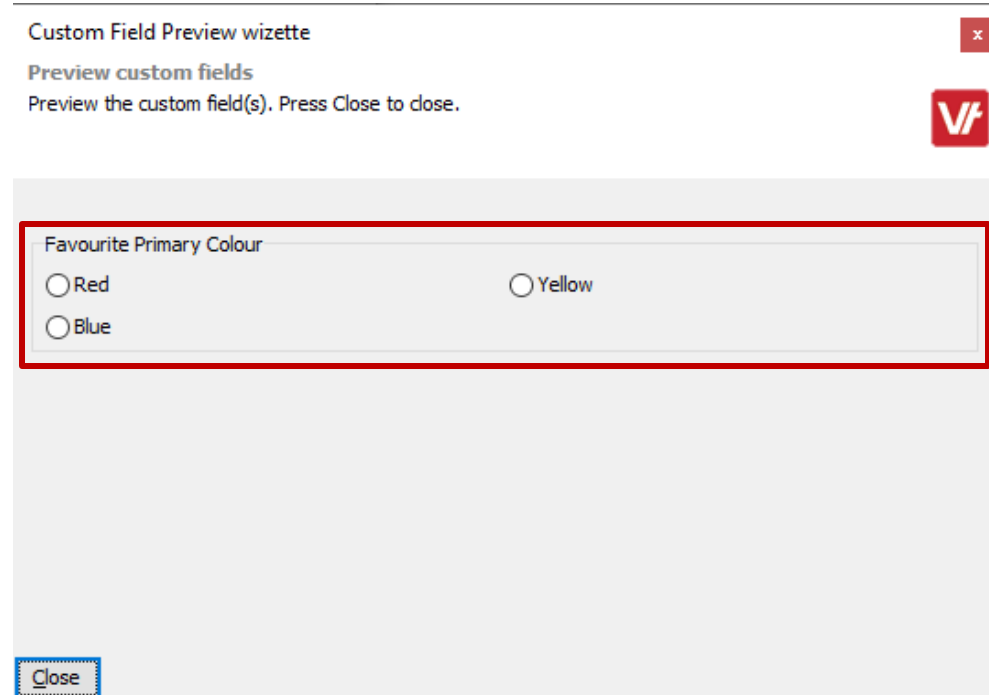
Item:
What are
Custom Fields?

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 Field Preview wizette

Preview custom fields

Preview the custom field(s). Press Close to close.

Favourite Primary Colour

☐ Red ☐ Yellow

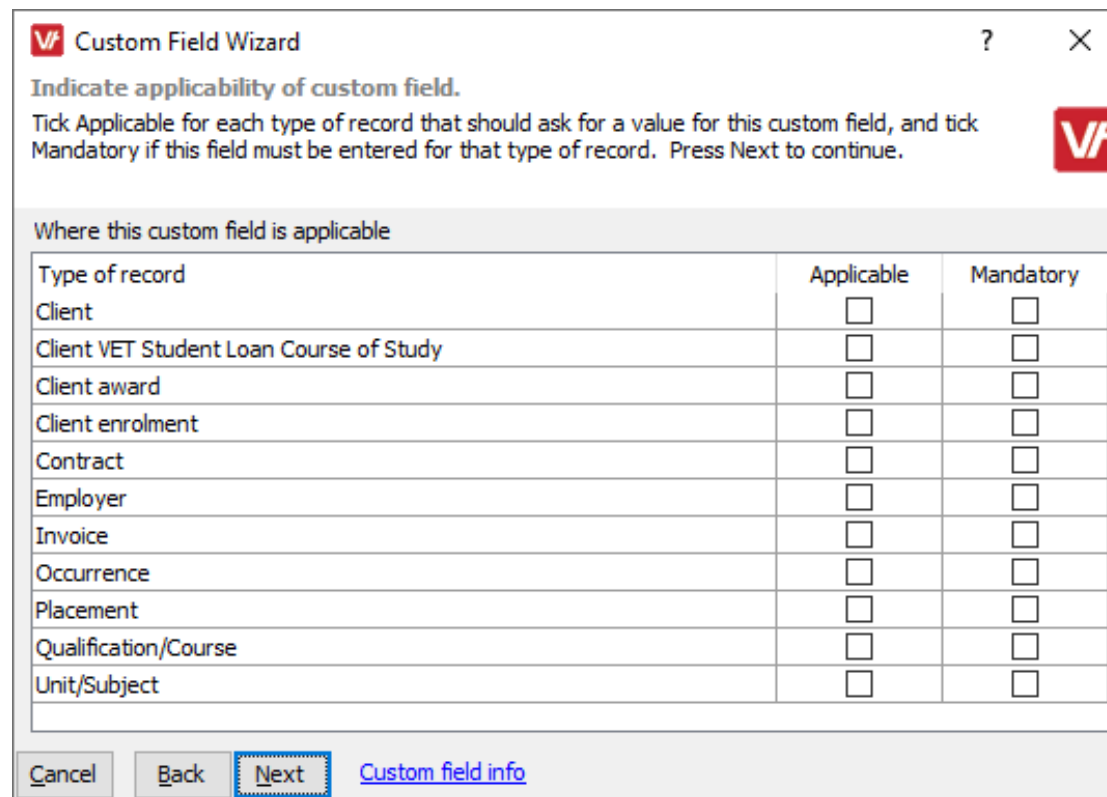
☐ Blue

Close

Custom Fields

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

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



Custom Field Wizard

Indicate applicability of custom field.

Tick Applicable for each type of record that should ask for a value for this custom field, and tick Mandatory if this field must be entered for that type of record. Press Next to continue.

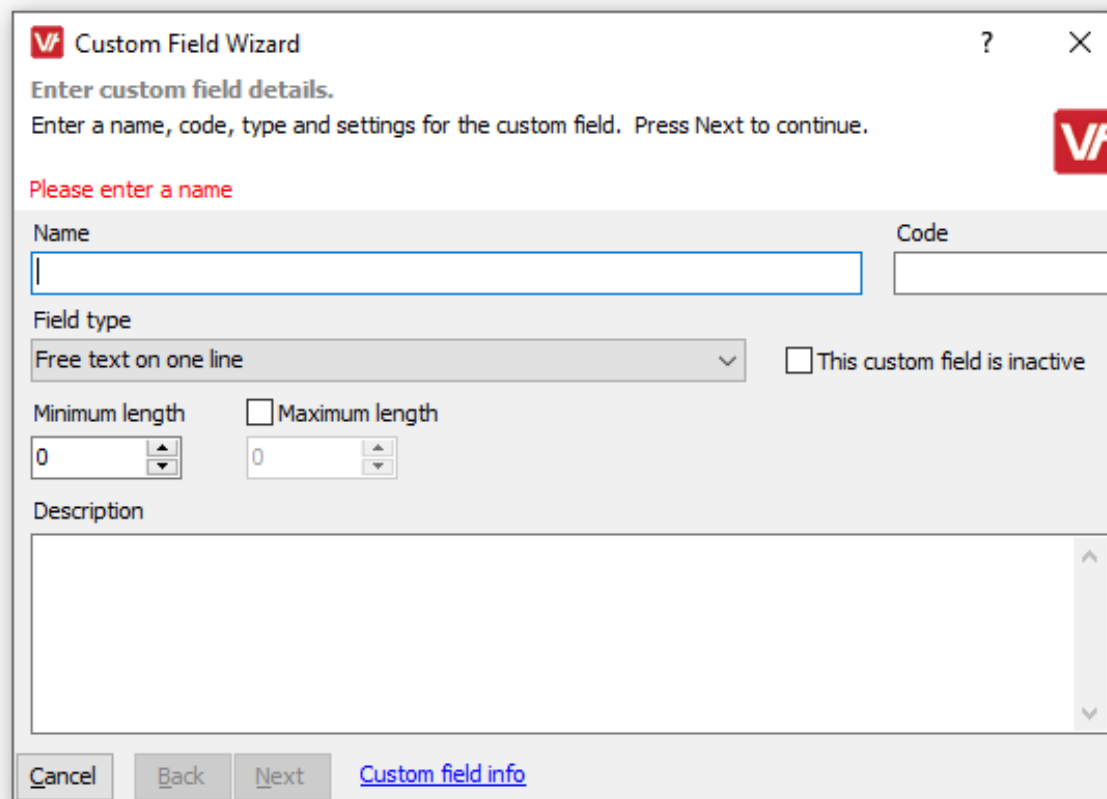
Where this custom field is applicable

Type of record	Applicable	Mandatory
Client	<input type="checkbox"/>	<input type="checkbox"/>
Client VET Student Loan Course of Study	<input type="checkbox"/>	<input type="checkbox"/>
Client award	<input type="checkbox"/>	<input type="checkbox"/>
Client enrolment	<input type="checkbox"/>	<input type="checkbox"/>
Contract	<input type="checkbox"/>	<input type="checkbox"/>
Employer	<input type="checkbox"/>	<input type="checkbox"/>
Invoice	<input type="checkbox"/>	<input type="checkbox"/>
Occurrence	<input type="checkbox"/>	<input type="checkbox"/>
Placement	<input type="checkbox"/>	<input type="checkbox"/>
Qualification/Course	<input type="checkbox"/>	<input type="checkbox"/>
Unit/Subject	<input type="checkbox"/>	<input type="checkbox"/>

[Cancel](#) [Back](#) [Next](#) [Custom field info](#)

Custom Fields

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



The screenshot shows the 'Custom Field Wizard' dialog box. The title bar includes the VT logo, the text 'Custom Field Wizard', and standard window controls. The main content area has the heading 'Enter custom field details.' followed by the instruction 'Enter a name, code, type and settings for the custom field. Press Next to continue.' A red error message 'Please enter a name' is displayed above the 'Name' input field. The 'Name' field is empty and has a blue border. To its right is the 'Code' field, also empty. Below these is the 'Field type' dropdown menu, which is currently set to 'Free text on one line'. To the right of the dropdown is a checkbox labeled 'This custom field is inactive'. Below the dropdown are two numeric input fields: 'Minimum length' (set to 0) and 'Maximum length' (set to 0). At the bottom is a large 'Description' text area. The bottom of the dialog features four buttons: 'Cancel', 'Back', 'Next', and a link labeled 'Custom field info'.

Custom Field Wizard

Enter custom field details.
Enter a name, code, type and settings for the custom field. Press Next to continue.

Please enter a name

Name

Code

Field type

Free text on one line

☐ This custom field is inactive

Minimum length

Maximum length

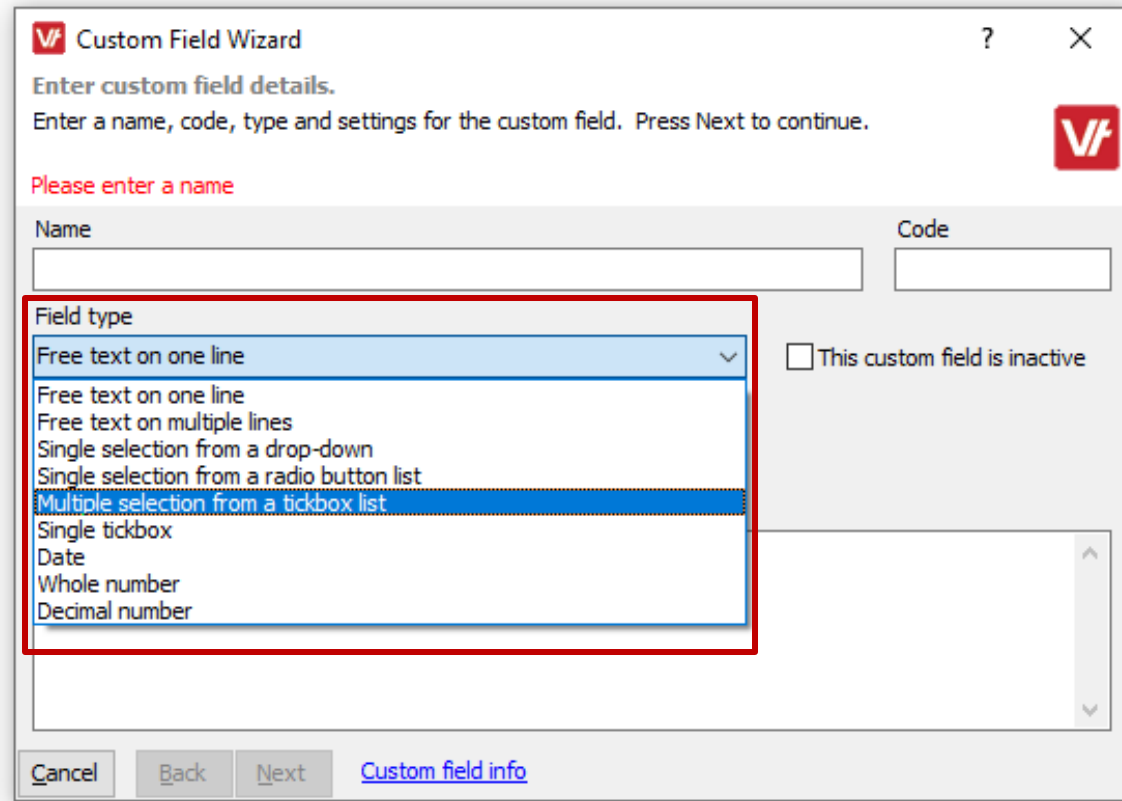
Description

Cancel Back Next [Custom field info](#)

Custom Fields

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

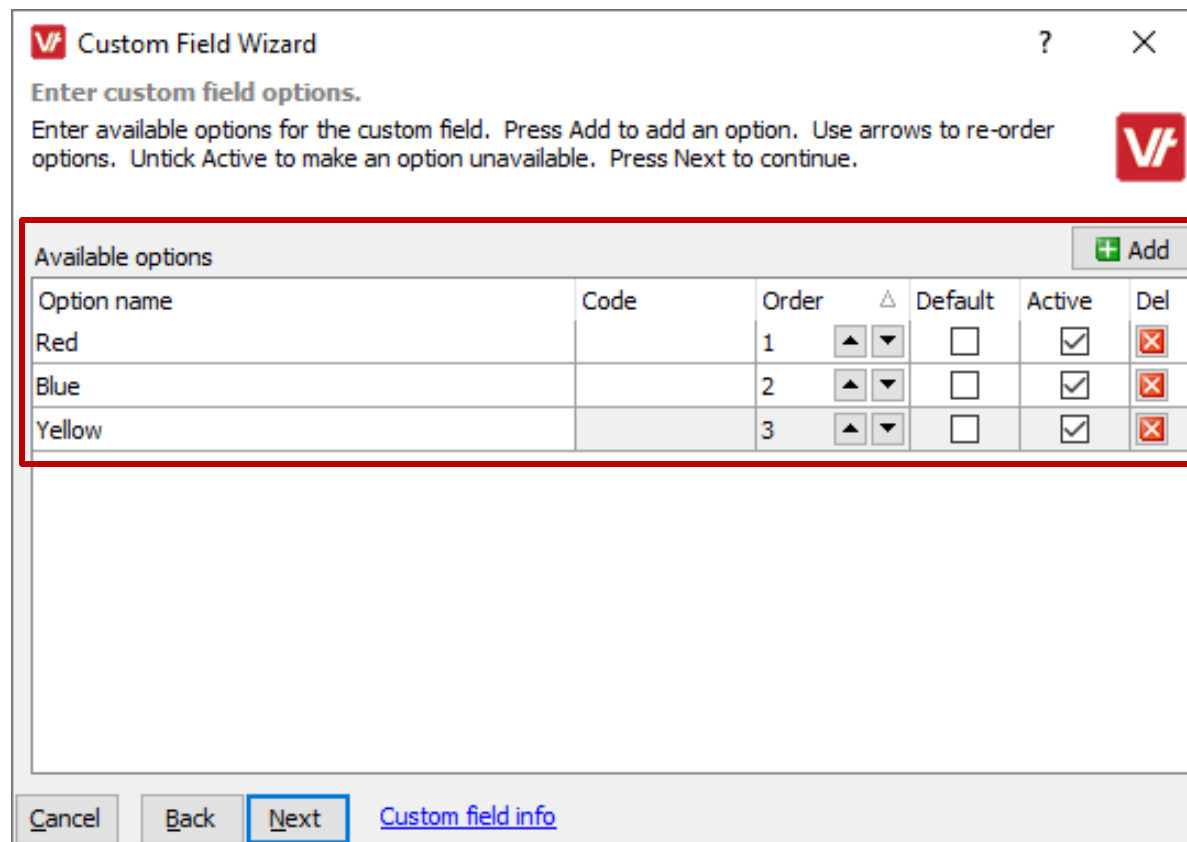
This is done by selecting what kind of **Field Type** will be used, which will format how the fields appears in the wizard – and what kind of input it will accept.



The screenshot shows the 'Custom Field Wizard' dialog box. The title bar includes the VT logo, the text 'Custom Field Wizard', and standard window controls. The main content area has the heading 'Enter custom field details.' followed by the instruction 'Enter a name, code, type and settings for the custom field. Press Next to continue.' Below this, there is a red error message 'Please enter a name'. The form contains two input fields: 'Name' and 'Code'. A 'Field type' dropdown menu is open, showing a list of options: 'Free text on one line', 'Free text on multiple lines', 'Single selection from a drop-down', 'Single selection from a radio button list', 'Multiple selection from a tickbox list' (which is highlighted in blue), 'Single tickbox', 'Date', 'Whole number', and 'Decimal number'. To the right of the dropdown is a checkbox labeled 'This custom field is inactive'. At the bottom of the dialog are buttons for 'Cancel', 'Back', 'Next', and a link for 'Custom field info'.

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 Field Wizard ? X

Enter custom field options.
Enter available options for the custom field. Press Add to add an option. Use arrows to re-order options. Untick Active to make an option unavailable. Press Next to continue.

Available options + Add

Option name	Code	Order		Default	Active	Del
Red		1	▲ ▼	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Blue		2	▲ ▼	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Yellow		3	▲ ▼	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Cancel Back **Next** [Custom field info](#)

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 Field Preview wizette

Preview custom fields

Preview the custom field(s). Press Close to close.

VT

Favourite Primary Colour

☐ Red

☐ Blue

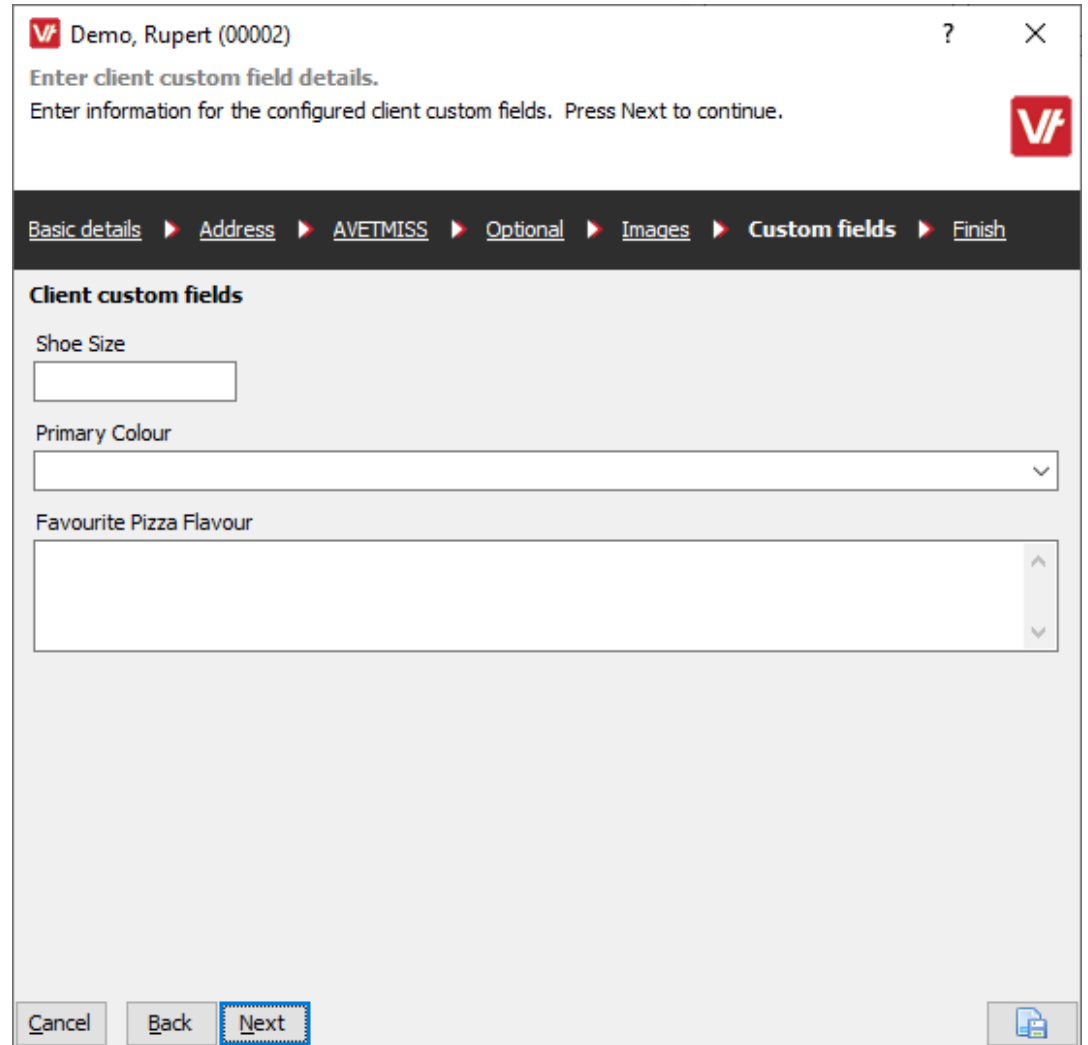
☐ Yellow

Close

Custom Fields

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

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



The screenshot shows a web application window titled "Demo, Rupert (00002)". The main heading is "Enter client custom field details." with a sub-instruction: "Enter information for the configured client custom fields. Press Next to continue." A progress bar at the top indicates the current step is "Custom fields", with previous steps being "Basic details", "Address", "AVETMISS", "Optional", "Images", and "Finish". The form contains three fields: "Shoe Size" (a text input), "Primary Colour" (a dropdown menu), and "Favourite Pizza Flavour" (a text area). At the bottom, there are "Cancel", "Back", and "Next" buttons, with "Next" being the active button. A small icon of a document with a plus sign is visible in the bottom right corner.

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](#)





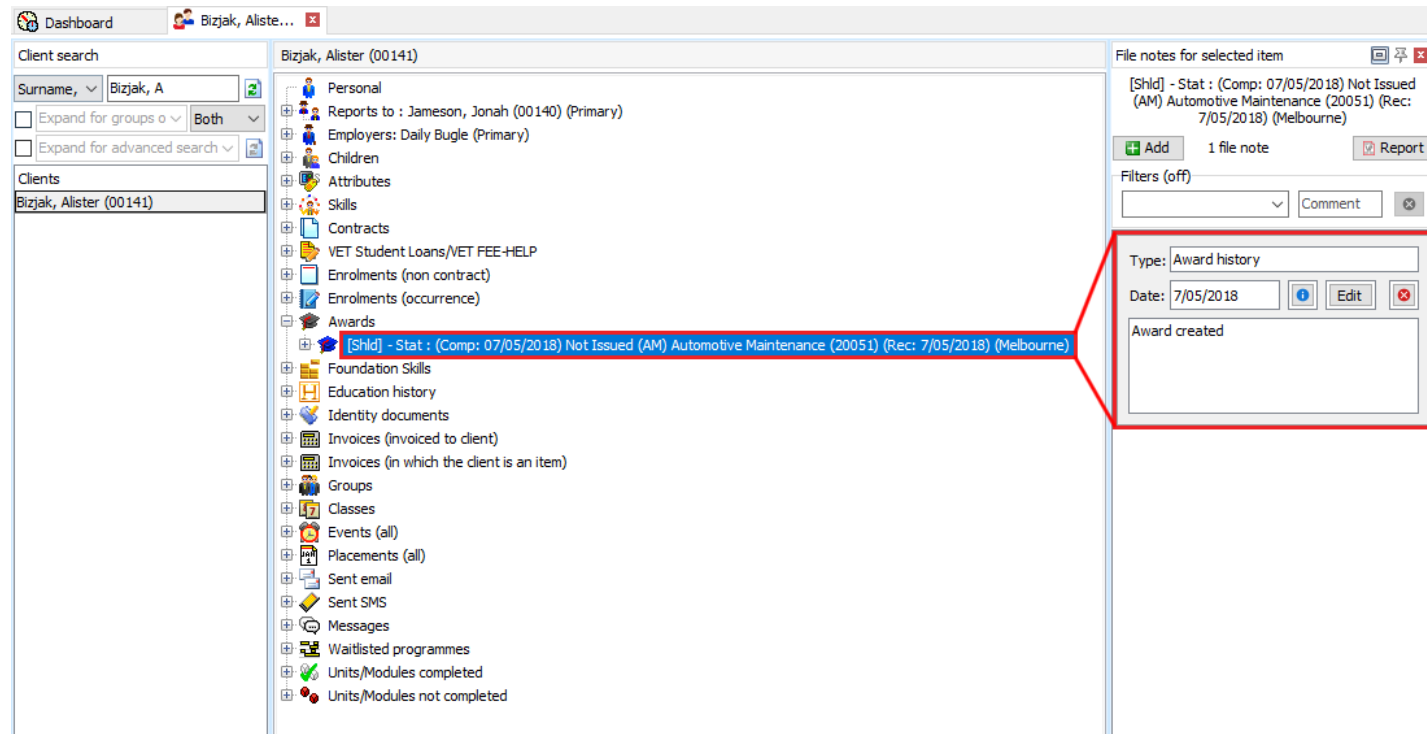
Item:
What are
File Notes?

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.

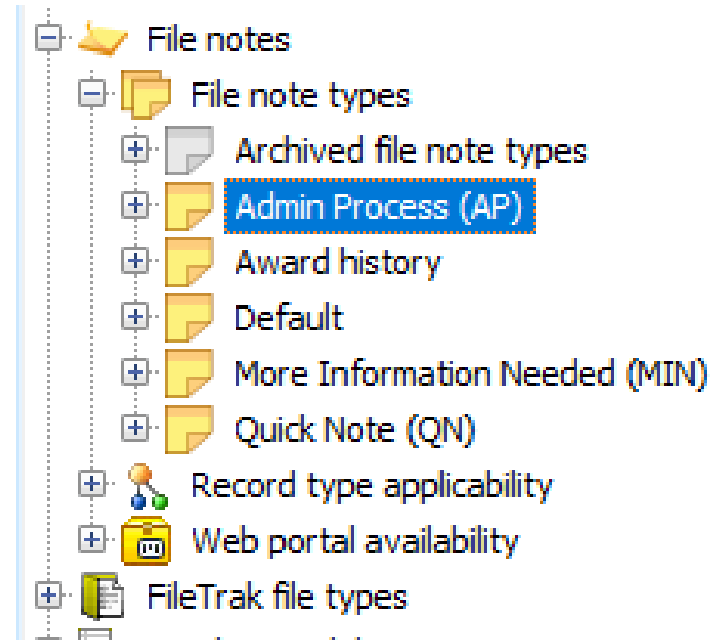
File Notes are reviewed within their own UI element within relevant managers.



File Notes

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

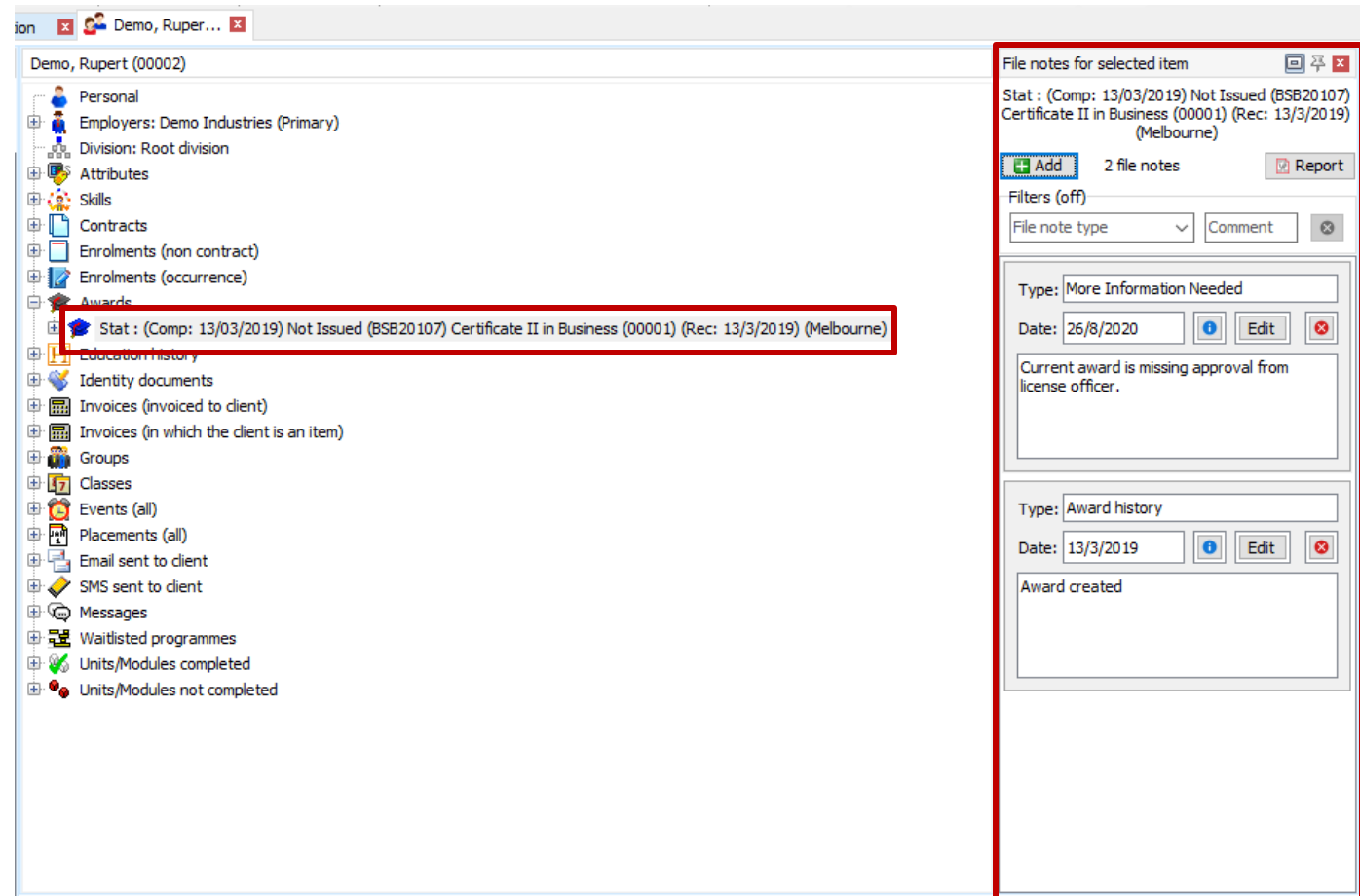
Template-style Files Notes can also be created as [Canned File Notes](#), to be quickly added as a new File Note - or appended to an existing File Note item.



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.

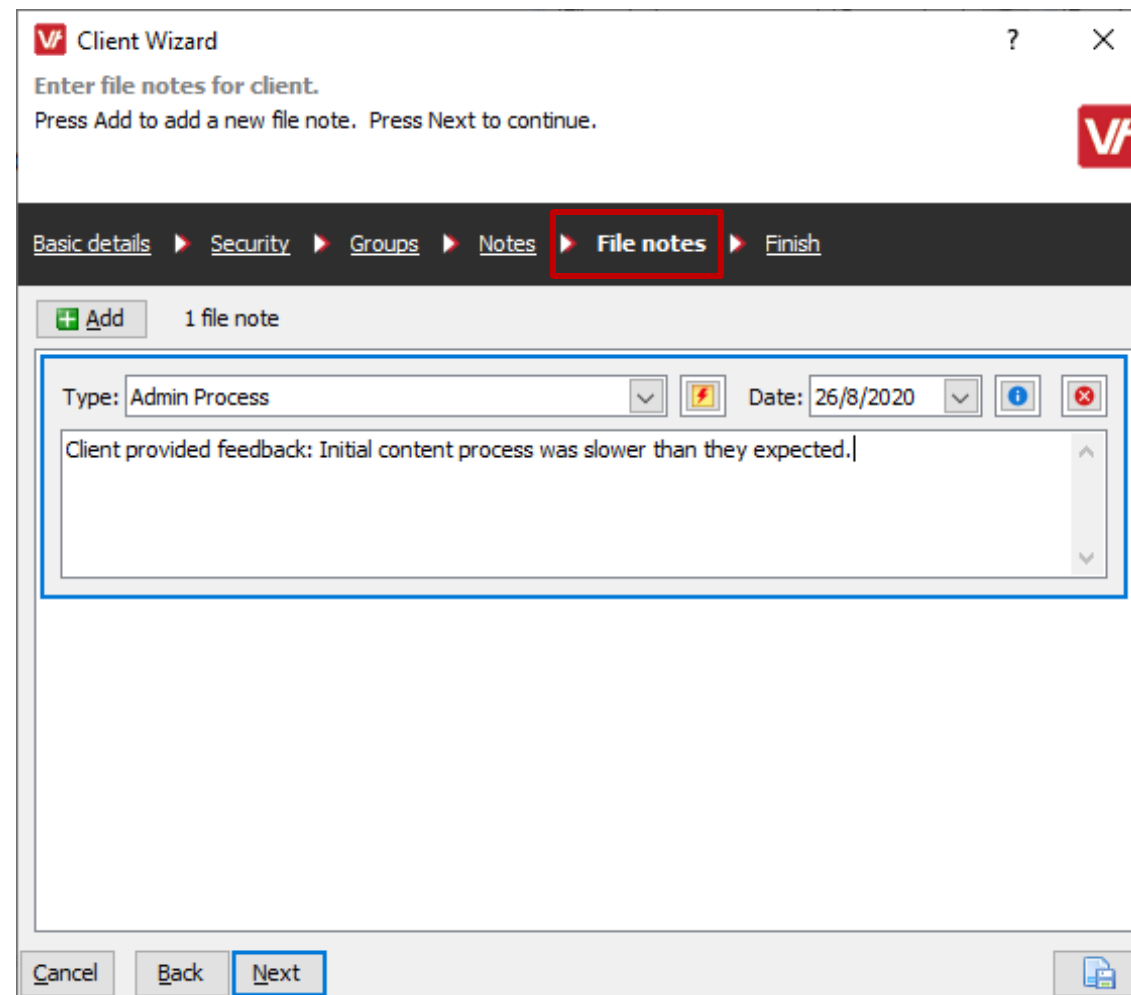


The screenshot displays the VT Admin interface for a user named "Demo, Rupert (00002)". The left sidebar lists various categories such as Personal, Employers, Division, Attributes, Skills, Contracts, Enrolments, Awards, Education history, Identity documents, Invoices, Groups, Classes, Events, Placements, Email sent to client, SMS sent to client, Messages, Waitlisted programmes, and Units/Modules completed/not completed. The "Awards" category is expanded, and a specific award is highlighted with a red box: "Stat : (Comp: 13/03/2019) Not Issued (BSB20107) Certificate II in Business (00001) (Rec: 13/3/2019) (Melbourne)".

The right panel, titled "File notes for selected item", shows the details for the selected award. It includes a "Stat" field with the same text as the award name. Below this, there are buttons for "Add" (highlighted with a red box) and "Report". A "Filters (off)" section contains a "File note type" dropdown menu and a "Comment" button. The "Type" field is set to "More Information Needed", and the "Date" is "26/8/2020". A text box below contains the message: "Current award is missing approval from license officer." Below this, the "Type" is set to "Award history", and the "Date" is "13/3/2019". A text box below contains the message: "Award created".

File Notes

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



The screenshot shows the 'Client Wizard' window with the 'File notes' step selected in the navigation bar. The window title is 'Client Wizard' and it includes a help icon and a close button. The main heading is 'Enter file notes for client.' with instructions: 'Press Add to add a new file note. Press Next to continue.' The navigation bar shows steps: Basic details, Security, Groups, Notes, File notes (highlighted with a red box), and Finish. Below the navigation bar, there is a '+ Add' button and a counter '1 file note'. The main area contains a form for adding a file note. The 'Type' dropdown is set to 'Admin Process'. The 'Date' is set to '26/8/2020'. The text area contains the note: 'Client provided feedback: Initial content process was slower than they expected.' At the bottom, there are 'Cancel', 'Back', and 'Next' buttons, with 'Next' highlighted by a blue box.

Client Wizard

Enter file notes for client.
Press Add to add a new file note. Press Next to continue.

Basic details ▶ Security ▶ Groups ▶ Notes ▶ **File notes** ▶ Finish

+ Add 1 file note

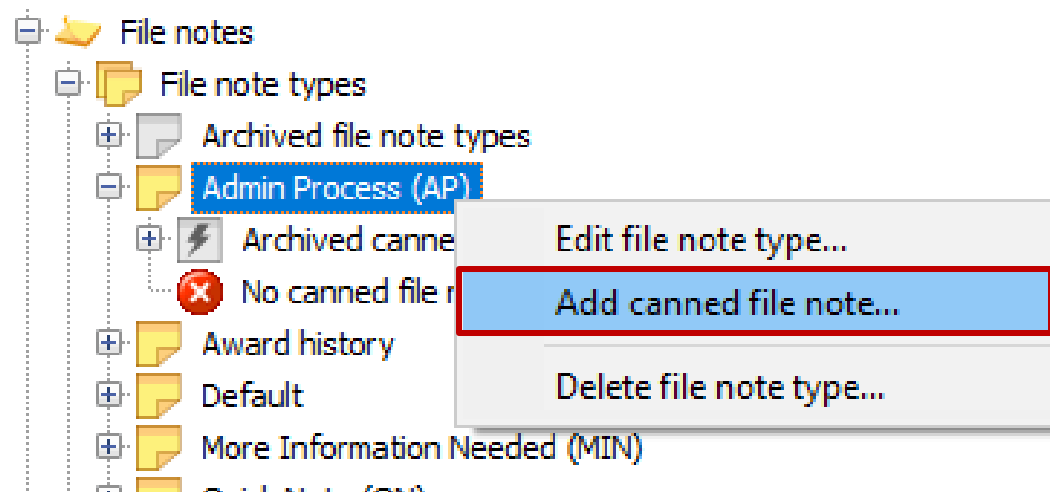
Type: Admin Process Date: 26/8/2020

Client provided feedback: Initial content process was slower than they expected.

Cancel Back Next

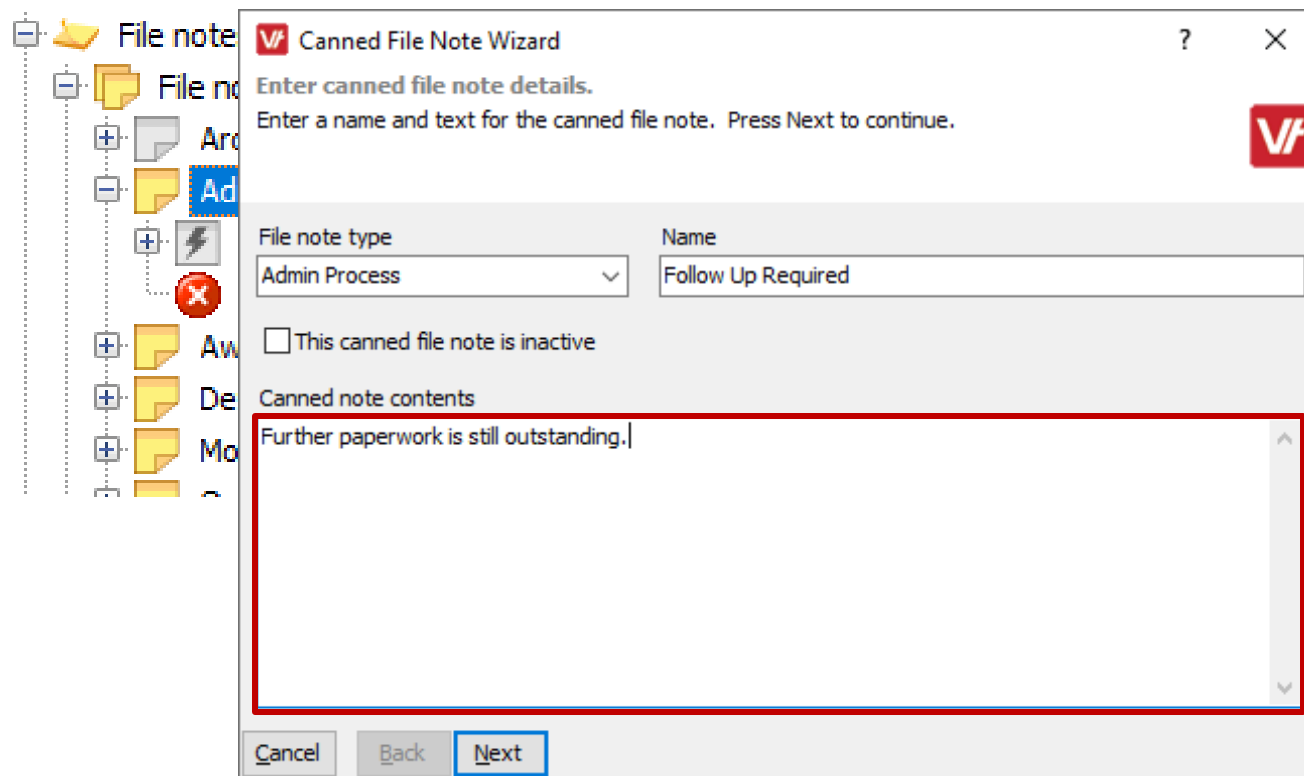
File Notes

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.



The screenshot shows a 'Canned File Note Wizard' dialog box. The title bar reads 'Canned File Note Wizard'. The main text says 'Enter canned file note details. Enter a name and text for the canned file note. Press Next to continue.' Below this, there are two input fields: 'File note type' with a dropdown menu showing 'Admin Process', and 'Name' with the text 'Follow Up Required'. There is a checkbox labeled 'This canned file note is inactive'. Below that is a text area labeled 'Canned note contents' containing the text 'Further paperwork is still outstanding.' The text area is highlighted with a red border. At the bottom are three buttons: 'Cancel', 'Back', and 'Next'.

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:

Filters (1 match)

Default

adopter

✕

Type: Default

Date: 9/10/2018

i

Edit

✕

Sally is part of our early adopters program.

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!



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

Today's webinar has only scratched the surface!

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](#)
- [Attributes](#)
- [Custom Fields](#)
- [File Notes](#)
- [Canned File Notes](#)