



VETtrak AcademyPlus

Self Service Reports

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 using the **Self Service Report** feature, providing opportunities for questions throughout.

Let's collaborate and learn together.



This session will cover:

1. What are **Self-Service Reports**?
2. Key Terminology
3. Existing Templates
4. Adding/Editing
5. Mapping and Running
6. Tips
7. Examples
8. Q&A





Item:

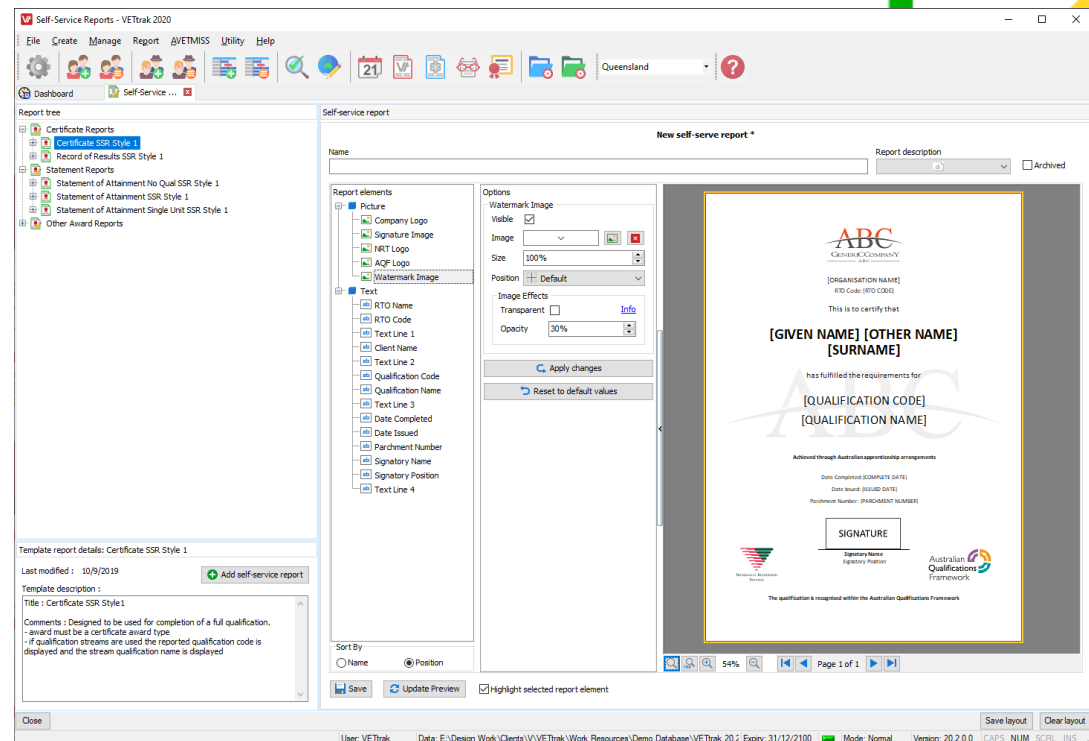
What are Self Service Reports

What are Self Service Reports?

Simply put, Self Service Reports allows you to create your own Award Reports.

You can browse the available templates - then create your own versions of these templates.

Amend these templates by selecting text and pictures then adjusting the available options. You can then save and use your reports via [report mappings](#).



Self Service Reports



How does it work?

It does this using a **simple click-and-edit** interface that shows all the elements of an award report, with the options to amend how those details display – such as changing images, styling text and amending the positions of items

Self-service report

New self-serve report *

Name Report description ☐ Archived

Report elements

- Picture
 - Company Logo
 - Signature Image
 - NRT Logo
 - AQF Logo
 - Watermark Image
- Text
 - RTO Name
 - RTO Code
 - Text Line 1
 - Client Name
 - Text Line 2
 - Qualification Code
 - Qualification Name
 - Text Line 3
 - Date Completed
 - Date Issued
 - Parchment Number
 - Signatory Name
 - Signatory Position
 - Text Line 4

Options

Client Name

Visible ☒

Font

Name

Size

Colour

Style ☐ B ☐ I ☐ S ☐ U

Alignment ☐ Left ☐ Center ☐ Right

Apply changes

Reset to default values

Sort By

☐ Name ☒ Position

Save Update Preview ☒ Highlight selected report element

Preview

ABC
GENERIC COMPANY
ABC

[ORGANISATION NAME]
RTO Code: [RTO CODE]

This is to certify that

[GIVEN NAME] [OTHER NAME]
[SURNAME]

has fulfilled the requirements for

[QUALIFICATION CODE]
[QUALIFICATION NAME]

Achieved through Australian apprenticeship arrangements

Date Completed: [COMPLETE DATE]
Date Issued: [ISSUED DATE]
Parchment Number: [PARCHMENT NUMBER]

SIGNATURE

Signatory Name
Signatory Position

Australian Qualifications Framework

The qualification is recognised within the Australian Qualifications Framework

54% Page 1 of 1

How does it work?

In this way you can customise the visual appearance of the Award to best suit your particular needs – Incorporating design elements that represent your company!



Item:

Key Terminology for the Self Service Reports Manager



Key Terminology for the **Self Service Reports Manager**

There are a number of unique terms and areas used within the Self Service Reports Manager.

Being aware of them will assist and streamline its use - let's go through them now!



Self Service Reports



Let's look at the manager interface.

1. Template List

Shows all available report templates as well as your customisations

2. Template Description

Describes the characteristics of the selected template

3. Report Elements

This lists all the text and picture elements you have control over in the template

4. Element Options

This lists the options you have control over for the selected element

5. Template Preview

Displays a preview of the template

The screenshot displays the 'Self-service report' manager interface. It is divided into several sections:

- Report tree (1):** A sidebar on the left showing a hierarchy of report templates. 'Certificate Reports' is expanded, showing 'Certificate SSR Style 1' (highlighted), 'Record of Results SSR Style 1', 'Statement Reports', and 'Other Award Reports'.
- Template report details: Certificate SSR Styl... (2):** A section below the report tree showing the 'Last modified' date and a '+ Add self-service report' button. Below this is the 'Template description' for 'Certificate SSR Style 1', including its title and comments.
- Report elements (3):** A central list of elements for the selected template. It is categorized into 'Picture' (Company Logo, Signature Image, NRT Logo, AQF Logo, Watermark Image) and 'Text' (RTO Name, RTO Code, Text Line 1-4, Client Name, Qualification Code, Qualification Name, Date Completed, Date Issued, Parchment Number, Signatory Name, Signatory Position, Text Line 4).
- Options (4):** A panel on the right for configuring the selected 'RTO Code' element. It includes settings for 'Visible' (checked), 'Width' (17.00cm), 'Height' (0.60cm), 'Text' (RTO Code), 'Position' (Default), 'Font' (Name: Calibri, Size: 12, Colour: black), 'Style' (Bold, Italic, Strikethrough, Underline), and 'Alignment' (Left, Center, Right).
- Template Preview (5):** A large preview area on the right showing the final report layout. It includes a 'LOGO' placeholder, a red-bordered box for '[ORGANISATION NAME] RTO Code: [RTO CODE]', a large 'WATERMARK' text, a signature line for '[GIVEN NAME] [OTHER NAME] [SURNAME]', and a signature box for 'SIGNATURE'. It also displays the 'Australian Qualifications Framework' logo and the text 'The qualification is recognised within the Australian Qualifications Framework'.

At the bottom of the interface, there are buttons for 'Save', 'Update Preview', and 'Highlight selected report element' (checked).



Item:

Existing Templates



VETtrak has a range of '**Existing**' award templates available within the Self Service Reports manager.

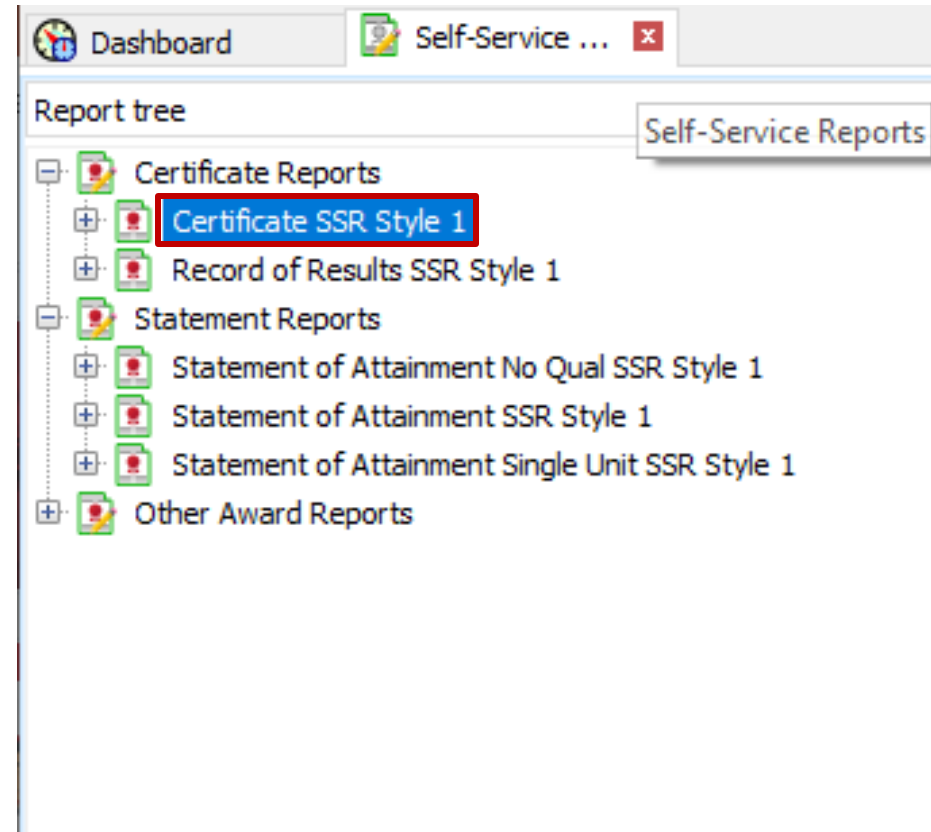
These serve as a standard set of generic templates that can be used right away and customised to your liking.

Self Service Reports



You can find these standard templates on the left-hand side of the Self Service Reports manager.

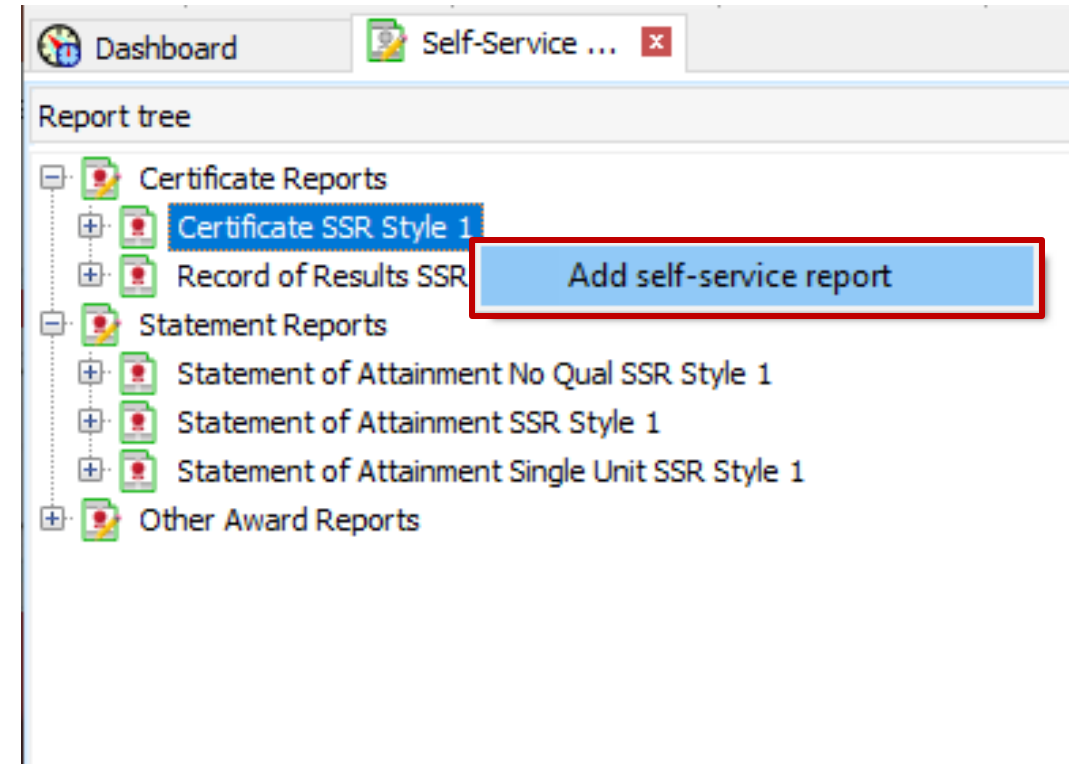
They are designed to cover a range of popular award templates that many customers have made in the past.



Self Service Reports



The advantage of being able to easily duplicate these templates is that it allows you to get a head start with making your customised version.



Item:

Adding/Editing Self Service Reports

Creating a new template will always follow the same four steps:

- Selecting an **Award Template**.

Select the award template that best suits your needs - based off the award type you may require,

- Amending your **Visual Elements**.

Change all the font and image details you need, to get the Award report looking juuust right.

- Giving your Award a **Name** and **Saving** it.

Give your Self Service award a name, so you can easily find it later – and save it!

- **Mapping** your newly created **Award**.

This configures the award, ready for use from any award related functionality in VETtrak!



Let's get our hands dirty!

Here is an article that will get you started on making your very own Self Service Report:

- [Process: Creating a Self-Service Report](#)



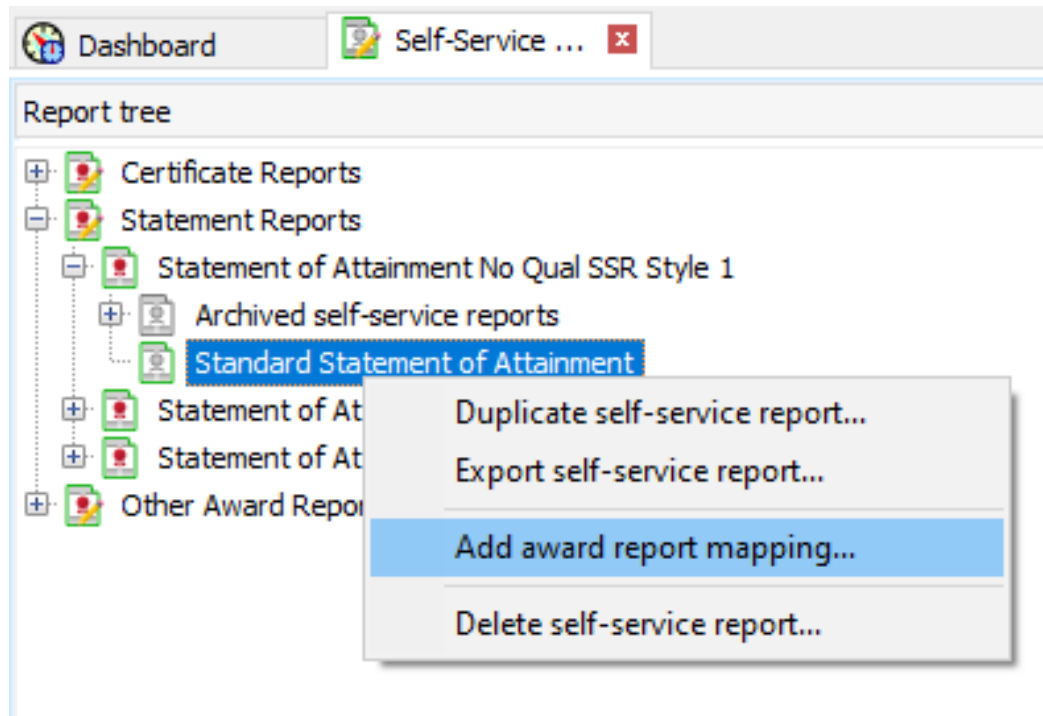
Item:

Mapping and Running Self Service Reports

Self Service award reports are **Mapped** within VETtrak, to work much like standard custom Award reports. When you Map an item in this way, you integrate its access into the VETtrak UI, allowing you to quickly run the award from context-sensitive menus.

This configures the award, ready for use from any award related functionality in VETtrak – including running standard individual awards – as well as bulk run options, with the benefit of then being able to export or email those awards directly to your students!






You can quickly and easily add a **Report Mapping** by right-clicking on your newly created template, and selecting the option **Add award report mapping**

Self Service Reports



Self-service award report mapping wizette ×

Enter award report mapping details.


Enter a name and select an award type. Press Finish to save. 

Self-Service Report

Standard Statement of Attainment ▼

Report display name [Info](#)

Standard Statement of Attainment

Award type  Order

Statement (Stat) ▼

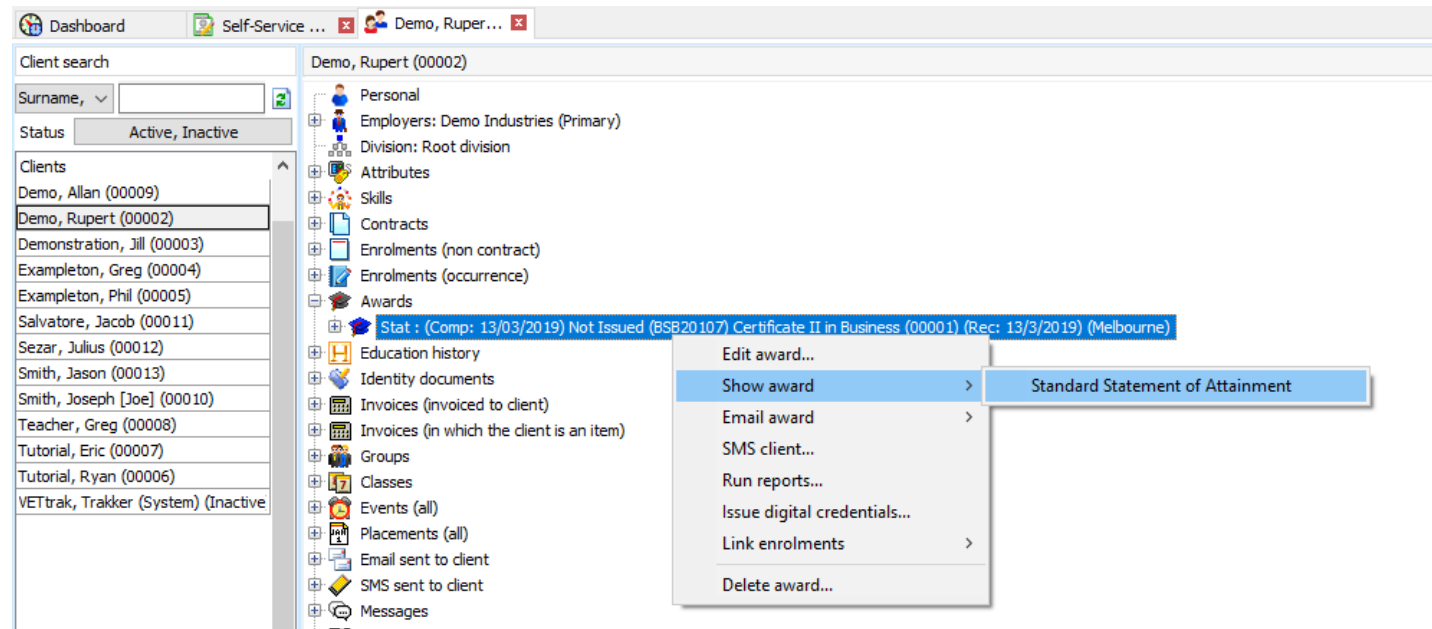
Cancel Finish

This will bring up a mini-wizette, where you can choose the **Report Display Name**, and select what **Award Type** this template will apply to.

Self Service Reports

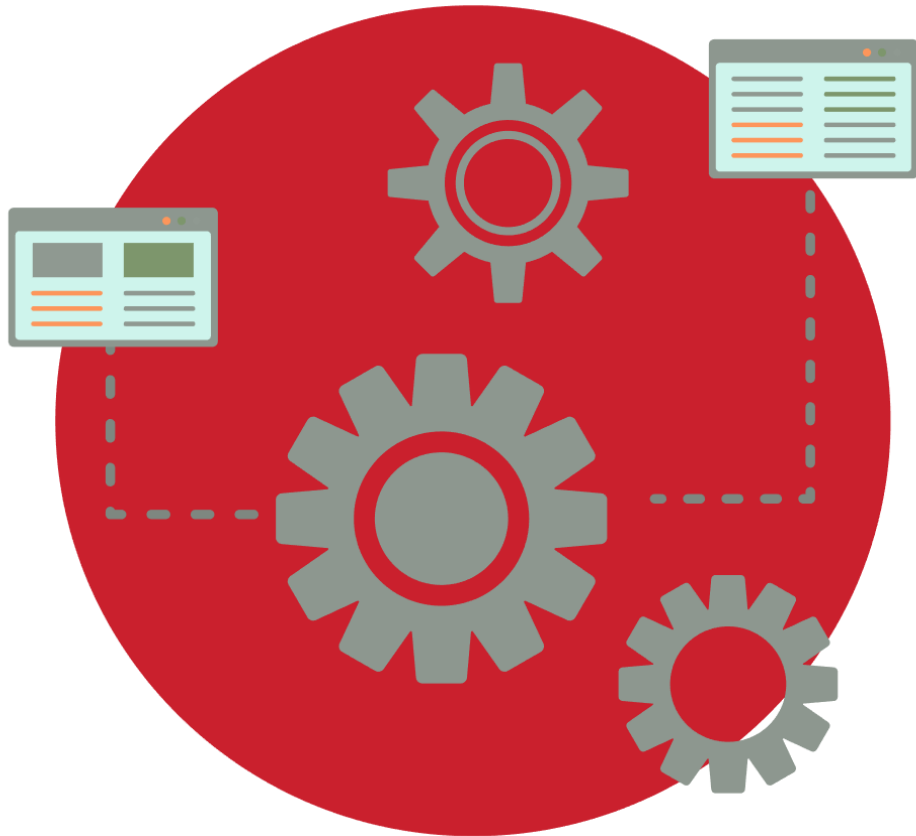


When you then right-click an Award of that type, and select a **Generate Award** option, you will be able to select your Template!



Item:

Self Service Reporting Tips



Some Useful Tips

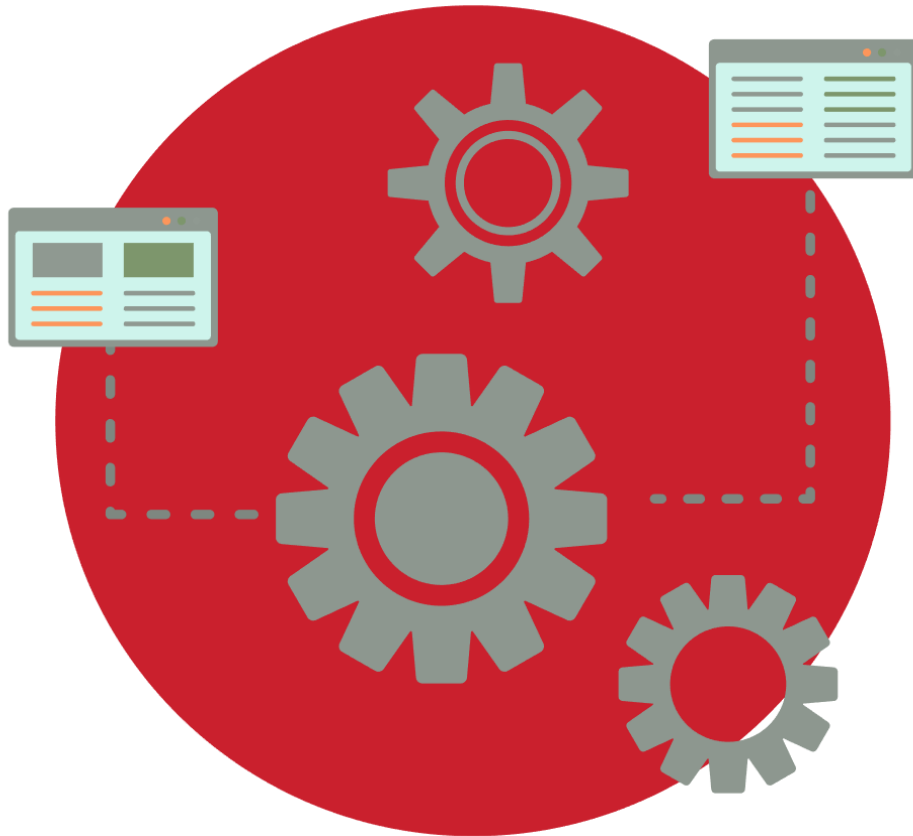
- You can **Bulk Change Fonts** by clicking on the **Text** elements heading:

Name
Standard Statement of Attainment

Report elements	Options
<div><input checked="" type="checkbox"/> Text</div> <div><input type="checkbox"/> RTO Name</div> <div><input type="checkbox"/> RTO Code</div> <div><input type="checkbox"/> Statement Title</div> <div><input type="checkbox"/> Text Line 1</div>	<div>Bulk Change Text</div> <div>Font</div> <div>Name <input type="text"/></div>

Some Useful Tips

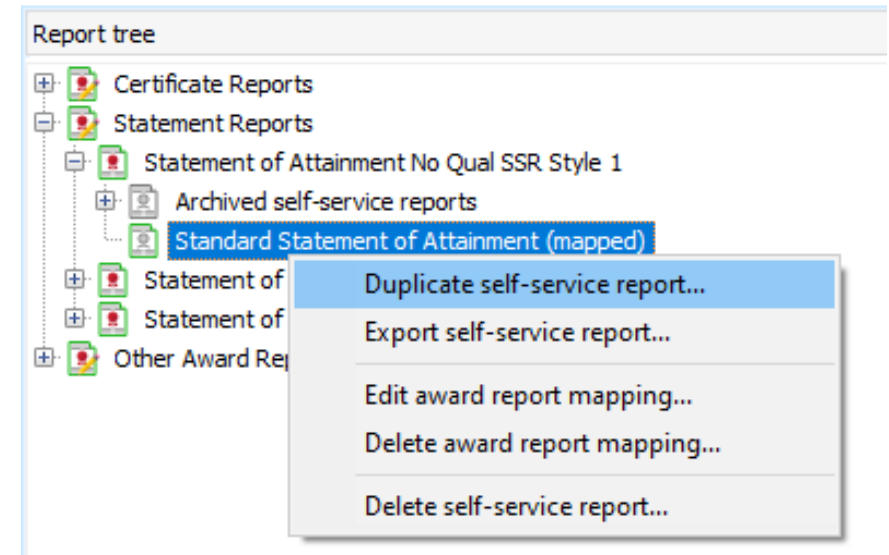
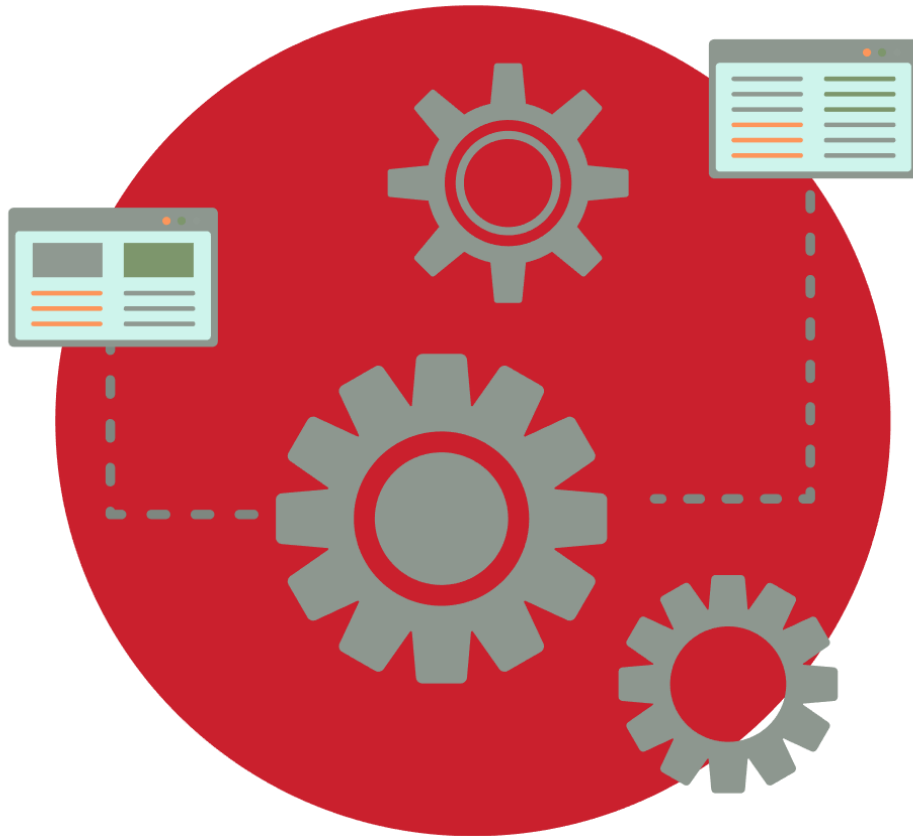
- You can use the Watermark image for more visual flexibility – in fact, you can actually create an A4 sized image that has all the design elements you need, and simply import that item into your background!



Some Useful Tips

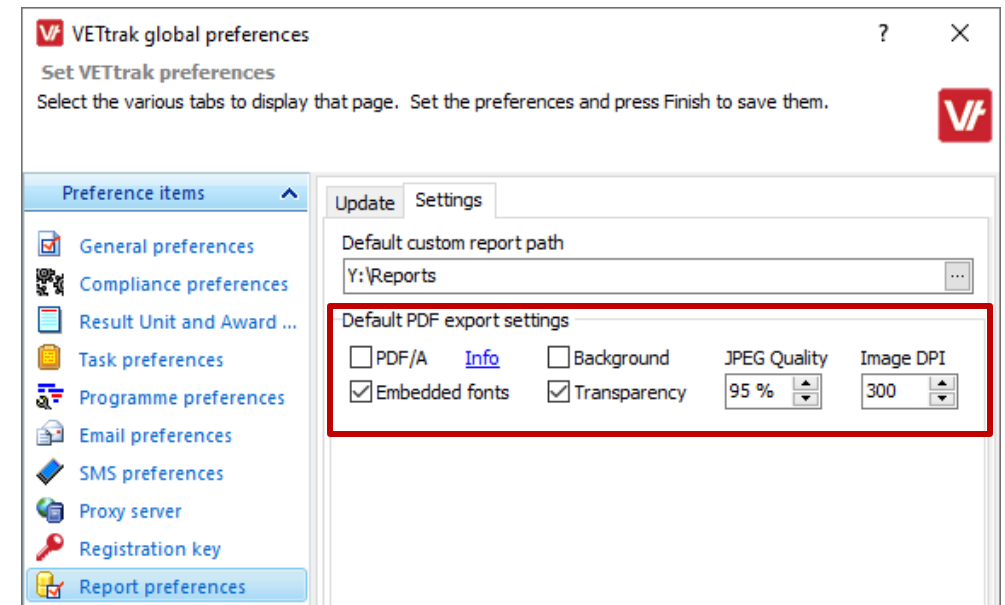
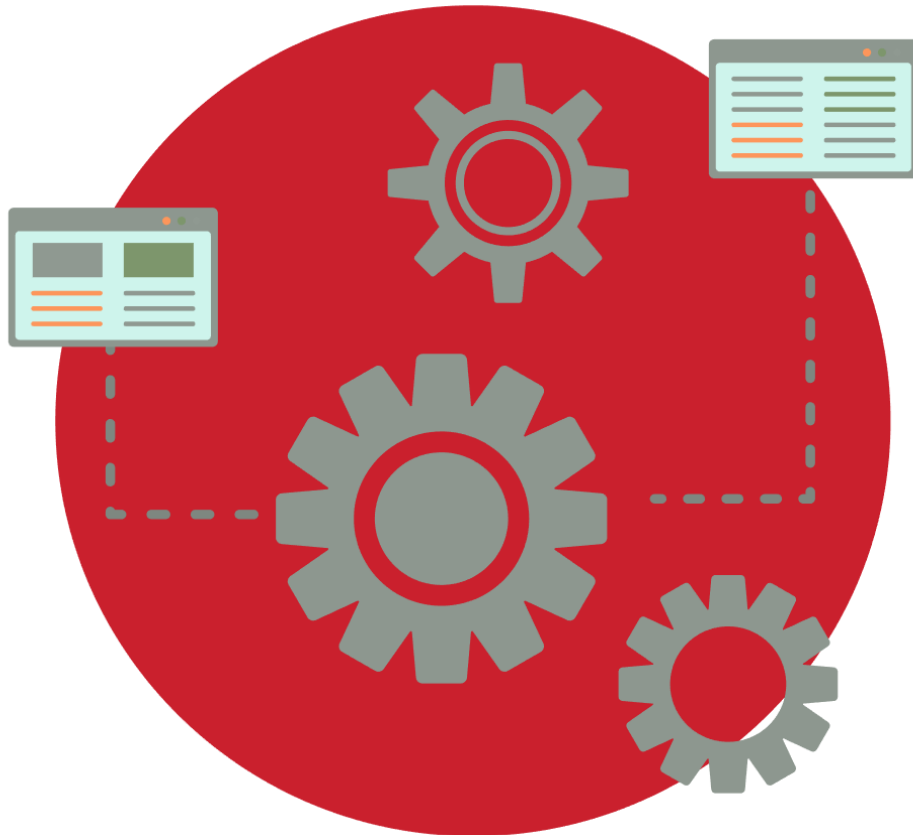
- You can easily **Duplicate** existing templates to create unique versions of your templates.

This can be massively helpful where you might need different signatory options!



Some Useful Tips

- Review your PDF export preferences under **File – Global Preferences – Report Preferences – Settings** to make sure your export settings are set up to create optimal PDFs!





Item:
That's a Wrap!

If you get stuck!



The **VETtrak** Help Centre has useful articles to assist with using the Self Service Report functionality:

- [VETtrak Reports](#)
- [Process: Creating a Self-Service Report](#)
- [Self-Service Reports Manager Overview](#)
- [Still an Option: Submitting a Report Request](#)