



VETtrak AcademyPlus

Data Insights Deep Dive

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 Data Insights feature, providing opportunities for questions throughout.

Let's collaborate and learn together.



This session will cover:

1. What is the **Data Insights Manager**? How does it **work**?
2. Key Terminology
3. Sample Queries
4. Creating A Simple Query
5. Advanced Query Techniques
6. The **Actions** Menu
7. Exporting Data



Item:

What is the

Data Insights Manager?

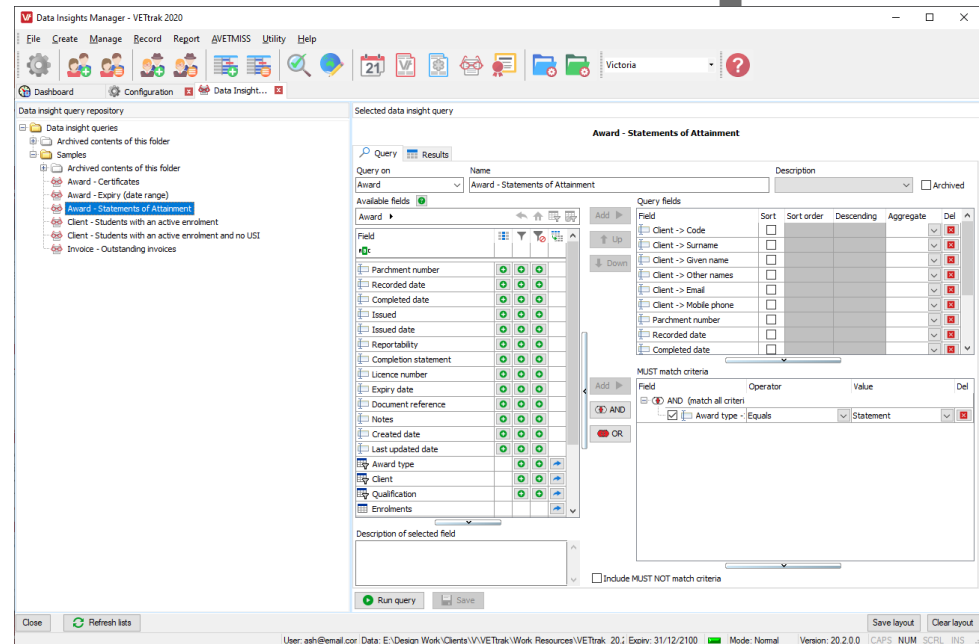
...and how does it work?

What is the **Data Insights Manager?**

Simply put, **Data Insights** allows you to create your own simple queries to extract data from your VETtrak database, with your choice of fields and search criteria.

You can export your query results to a variety of formats, as well as perform certain bulk actions on some types of data.

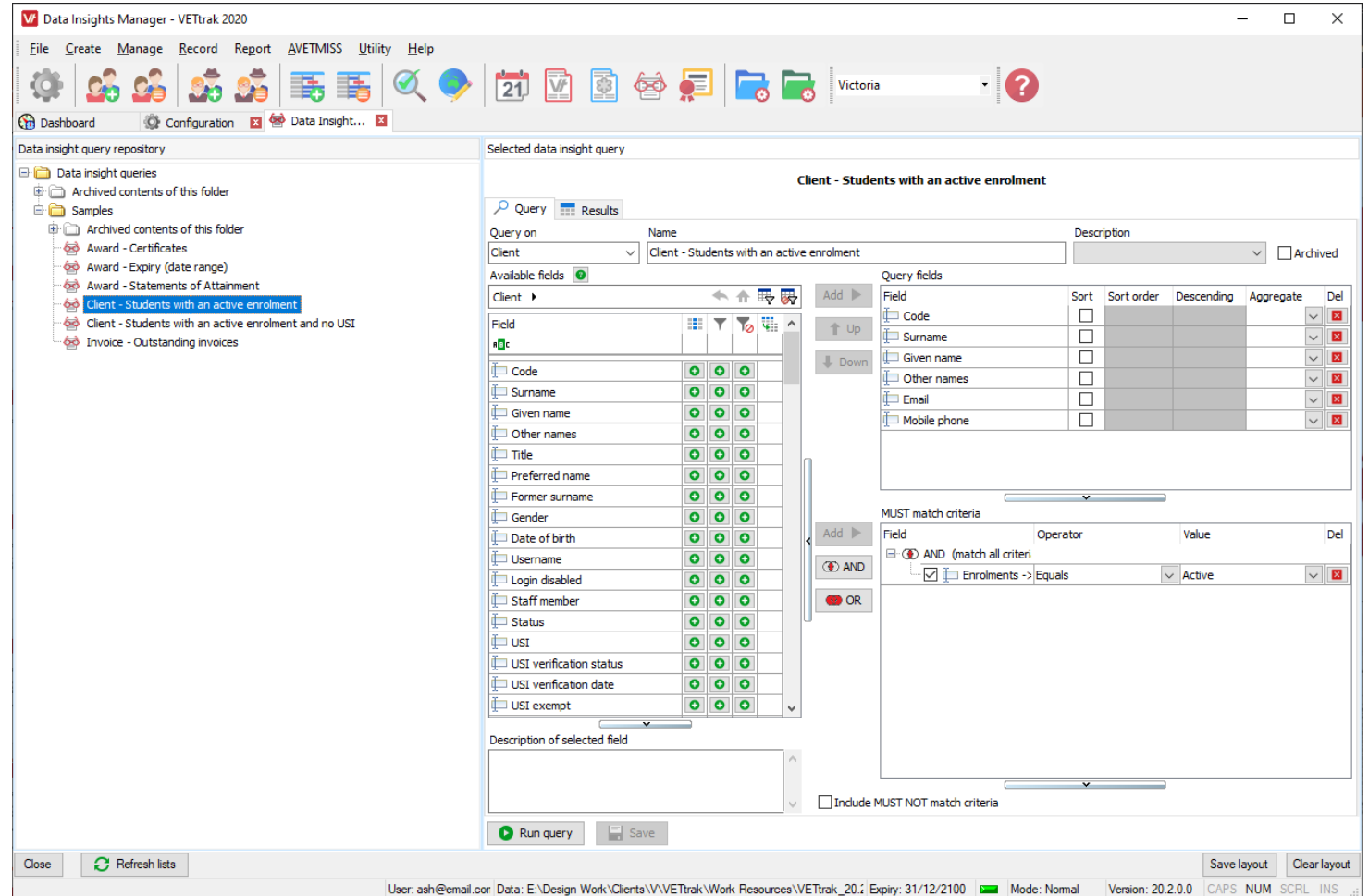
You can also save your queries to your query repository for future use.



How does it work?

It does this using a simple **drag-and-drop** interface that lists all the different data types within VETtrak.

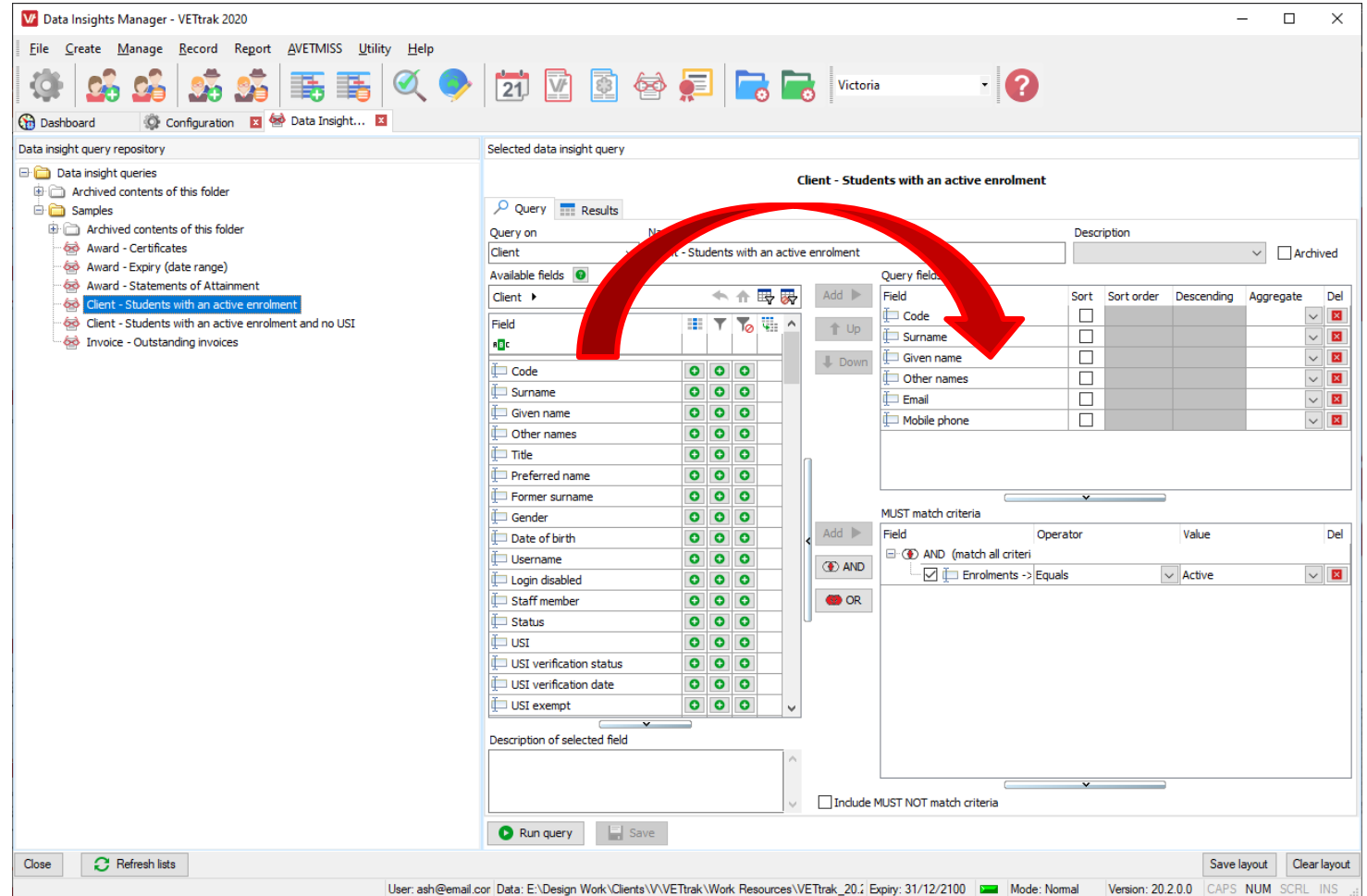
These correspond to all the data you have entered.



How does it work?

These correspond to all the data you have entered.

Drag and drop the fields you wish to see in your output.



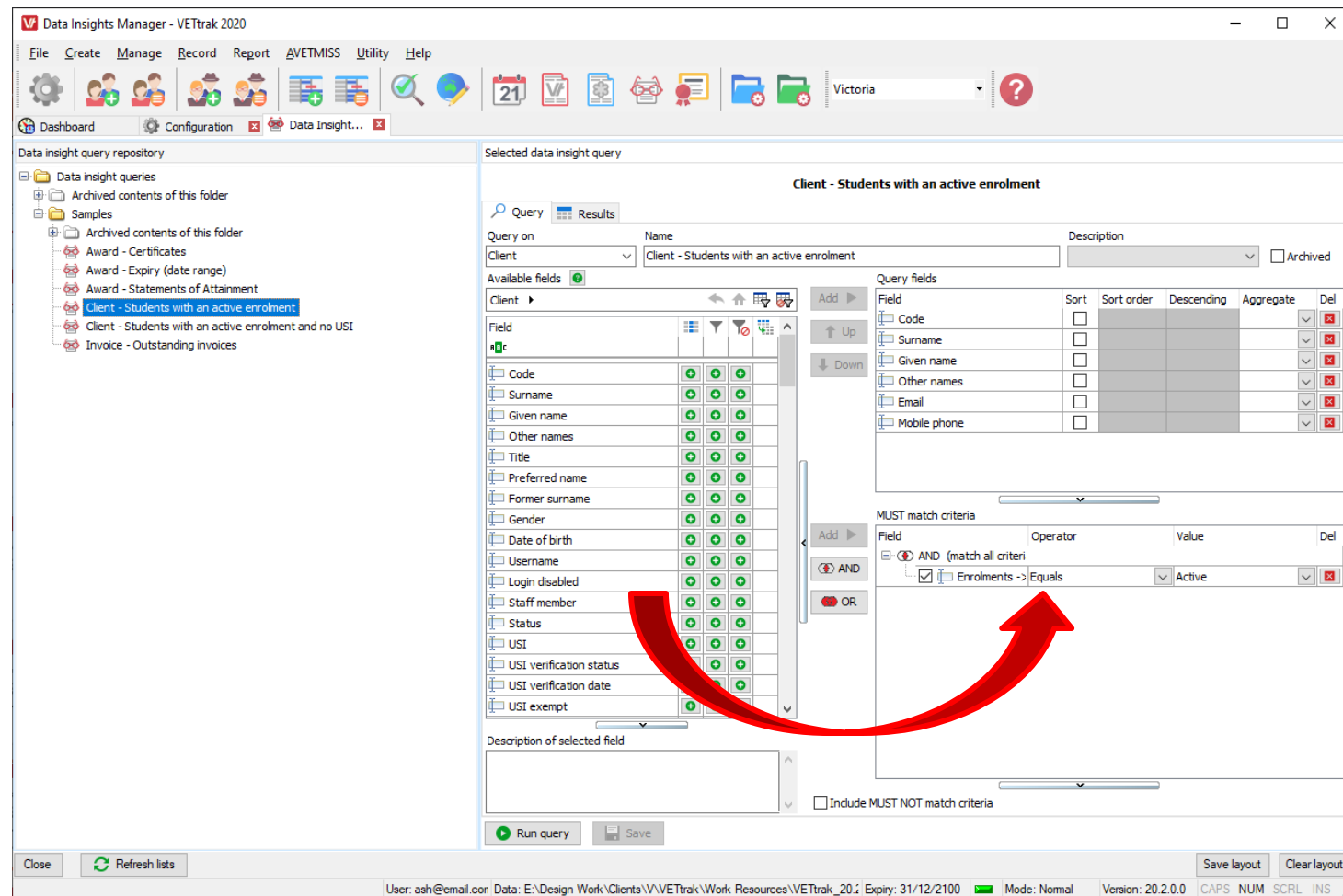
The screenshot shows the 'Data Insights Manager - VETtrak 2020' application. The interface includes a menu bar (File, Create, Manage, Record, Report, AVETMISS, Utility, Help) and a toolbar with various icons. The main window is divided into several sections:

- Data insight query repository:** A tree view on the left showing folders like 'Data insight queries', 'Archived contents of this folder', and 'Samples'. Under 'Samples', there are several query entries, including 'Client - Students with an active enrolment' which is highlighted.
- Selected data insight query:** A section on the right showing the details of the selected query. It includes a 'Query' tab and a 'Results' tab. The 'Query' tab is active, showing the query name 'Client - Students with an active enrolment' and a description.
- Available fields:** A list of fields on the left side of the query configuration area, including 'Code', 'Surname', 'Given name', 'Other names', 'Title', 'Preferred name', 'Former surname', 'Gender', 'Date of birth', 'Username', 'Login disabled', 'Staff member', 'Status', 'USI', 'USI verification status', 'USI verification date', and 'USI exempt'. Each field has a green checkmark in the 'Available' column.
- Query fields:** A list of fields on the right side of the query configuration area, including 'Code', 'Surname', 'Given name', 'Other names', 'Email', and 'Mobile phone'. Each field has a checkbox in the 'Selected' column.
- MUST match criteria:** A section at the bottom right for defining search criteria. It includes a table with columns for 'Field', 'Operator', 'Value', and 'Del'. The criteria shown are 'AND (match all criteria)' and 'Enrolments -> Equals Active'.

A red arrow points from the 'Available fields' list to the 'Query fields' list, indicating the drag-and-drop functionality.

How does it work?

Drag and drop the fields you wish to use as filter options.



Data Insights Manager - VETtrak 2020

File Create Manage Record Report AVETMISS Utility Help

Dashboard Configuration Data Insight...

Data insight query repository

- Data insight queries
 - Archived contents of this folder
 - Samples
 - Archived contents of this folder
 - Award - Certificates
 - Award - Expiry (date range)
 - Award - Statements of Attainment
 - Client - Students with an active enrolment**
 - Client - Students with an active enrolment and no USI
 - Invoice - Outstanding invoices

Selected data insight query

Client - Students with an active enrolment

Query on: Client Name: Client - Students with an active enrolment Description: [dropdown] [checkbox] Archived

Available fields: [checkbox] Client

Field	Sort	Sort order	Descending	Aggregate	Del
Code	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Surname	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Given name	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Other names	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Mobile phone	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Field	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Code	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Surname	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Given name	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Other names	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Title	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Preferred name	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Former surname	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Gender	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Date of birth	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Username	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Login disabled	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Staff member	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Status	<input type="checkbox"/>				<input checked="" type="checkbox"/>
USI	<input type="checkbox"/>				<input checked="" type="checkbox"/>
USI verification status	<input type="checkbox"/>				<input checked="" type="checkbox"/>
USI verification date	<input type="checkbox"/>				<input checked="" type="checkbox"/>
USI exempt	<input type="checkbox"/>				<input checked="" type="checkbox"/>

Description of selected field: [text area]

Query fields

Field	Sort	Sort order	Descending	Aggregate	Del
Code	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Surname	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Given name	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Other names	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>				<input checked="" type="checkbox"/>
Mobile phone	<input type="checkbox"/>				<input checked="" type="checkbox"/>

MUST match criteria

Add [dropdown] [checkbox] AND (match all criteria) [checkbox] Enrolments -> Equals [dropdown] Active [checkbox] Del [checkbox]

[checkbox] Include MUST NOT match criteria

Run query Save

Close Refresh lists Save layout Clear layout

User: ash@email.cor Data: E:\Design Work\Clients\V\ETtrak\Work Resources\ETtrak_20.1 Expiry: 31/12/2100 Mode: Normal Version: 20.2.0.0 CAPS NUM SCRL INS

Data Insights Deep Dive



You can then run your created query and see a list of returned data.

Data Insights Manager - VETtrak 2020

File Create Manage Record Report AVETMISS Utility Help

Dashboard Configuration Data Insight...

Data insight query repository

- Data insight queries
 - Archived contents of this folder
 - Samples
 - Archived contents of this folder
 - Award - Certificates
 - Award - Expiry (date range)
 - Award - Statements of Attainment
 - Client - Students with an active enrolment**
 - Client - Students with an active enrolment and no USI
 - Invoice - Outstanding invoices

Selected data insight query

Client - Students with an active enrolment

Query Results

Export Action 3 matching client records found

Drag a column header here to group by that column

Use	Open	Code	Surname	Given name	Other names	Email	Mobile phone
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	00002	Knight	Greg		knight@daymail.com	0411111111
<input checked="" type="checkbox"/>	<input type="checkbox"/>	00003	Student	Sally			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	00004	Wayling	Jayna	Grace		

Run query Save

Close Refresh lists

Save layout Clear layout

User: ash@email.com Data: E:\Design Work\Clients\V\VETtrak\Work Resources\VETtrak_20.1 Expiry: 31/12/2100 Mode: Normal Version: 20.2.0.0 CAPS NUM SCRL INS

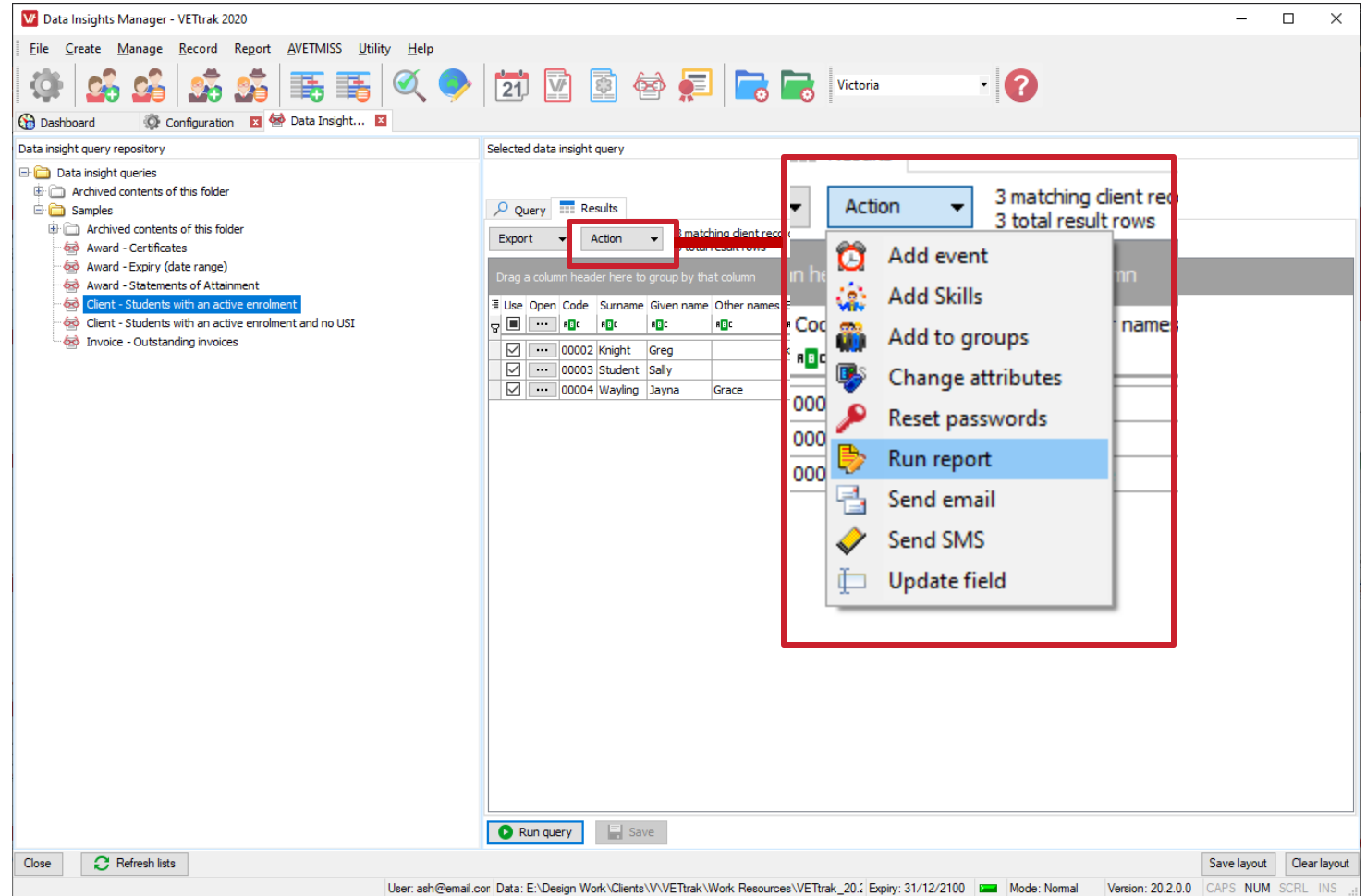
Data Insights Deep Dive



You can then use the **Action** menu to choose what you do with this created list of data.

Examples of these actions include:

- Manipulating data
- Running reports
- Opening special wizards
- Updating records
- Email/SMS People



Item:

Key Terminology for the Data Insights Manager

(a.k.a - How to avoid getting lost)

Key Terminology for the **Data Insights Manager**

There are a number of unique terms and areas used within the Data Insights Manager.

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

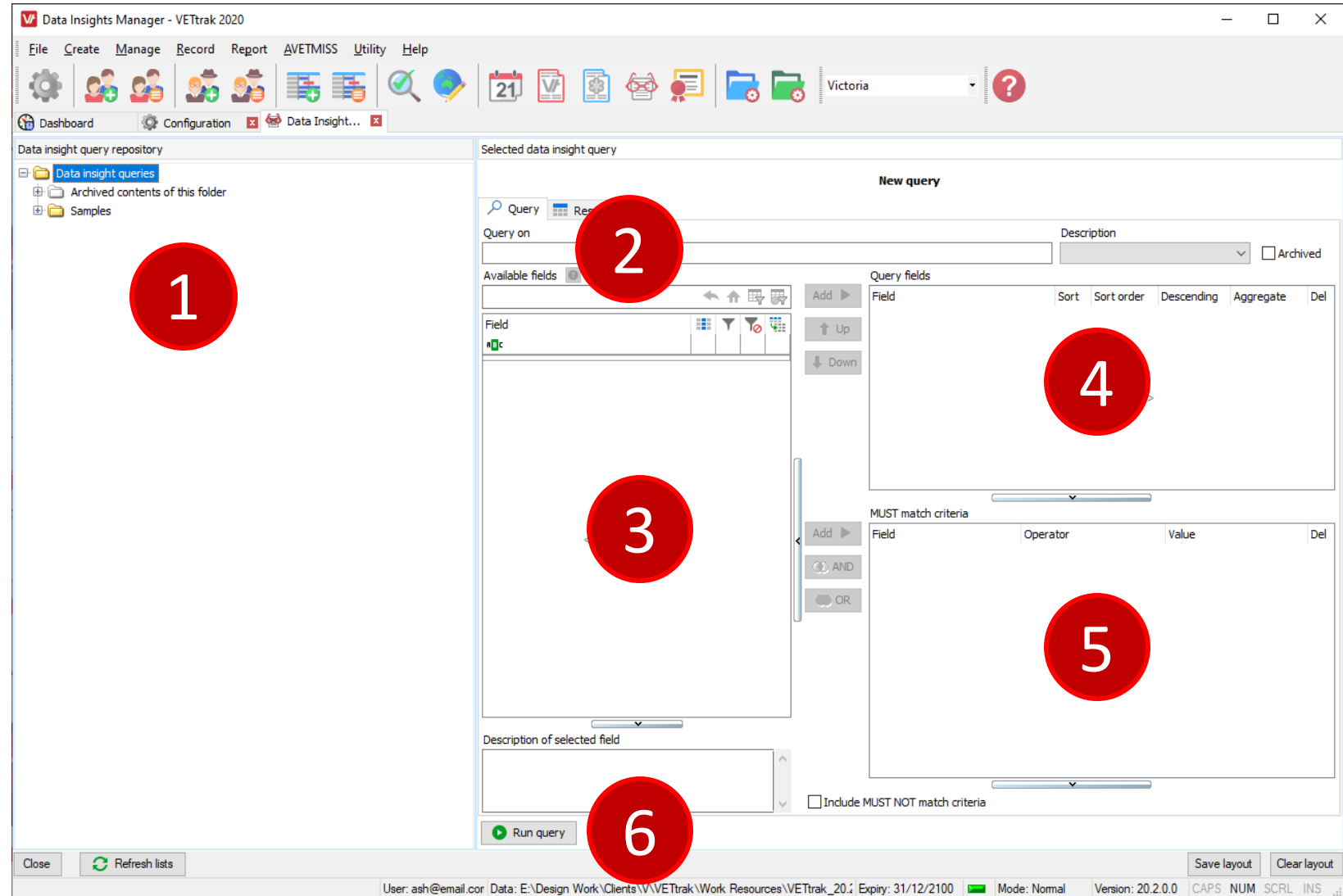


Data Insights Deep Dive



Let's look at the manager interface.

- 1. Query List**
Shows all saved Queries in your VETtrak Database
- 2. Query on**
Select what data type you are querying on (Enrolment, Client, Etc.)
- 3. Available Data List Fields**
This lists all the data fields relevant to your 'Query On' selection
- 4. Query Fields**
The fields you wish to see in your output
- 5. Criteria Fields**
The fields you wish to filter your results by.
- 6. Run Query**
Perform the query based on the fields you have configured



Data Insights Deep Dive



Once you have run your query

1. Query Output

Displays the returned results of your query in a grid.

(You can manipulate this grid! More on that soon)

The screenshot shows the 'Data Insights Manager - VETtrak 2020' application. The left pane displays a 'Data insight query repository' with a tree view containing folders like 'Archived contents of this folder' and 'Samples', and specific queries such as 'Award - Certificates', 'Award - Expiry (date range)', 'Award - Statements of Attainment', 'Client - Students with an active enrolment' (which is selected), 'Client - Students with an active enrolment and no USI', and 'Invoice - Outstanding invoices'.

The right pane, titled 'Selected data insight query', shows the query 'Client - Students with an active enrolment'. It includes tabs for 'Query' and 'Results', and buttons for 'Export' and 'Action'. Below these, it states '3 matching client records found' and '3 total result rows'. A table displays the results with columns: 'Use', 'Open', 'Code', 'Surname', 'Given name', 'Other names', 'Email', and 'Mobile phone'. The table contains three rows of data, each with a checkbox in the 'Use' column.

A large red circle with the number '1' is overlaid on the bottom right of the interface.

Use	Open	Code	Surname	Given name	Other names	Email	Mobile phone
<input checked="" type="checkbox"/>	...	00002	Knight	Greg		knight@daymail.com	0411111111
<input checked="" type="checkbox"/>	...	00003	Student	Sally			
<input checked="" type="checkbox"/>	...	00004	Wayling	Jayna	Grace		

Item:

Sample Queries



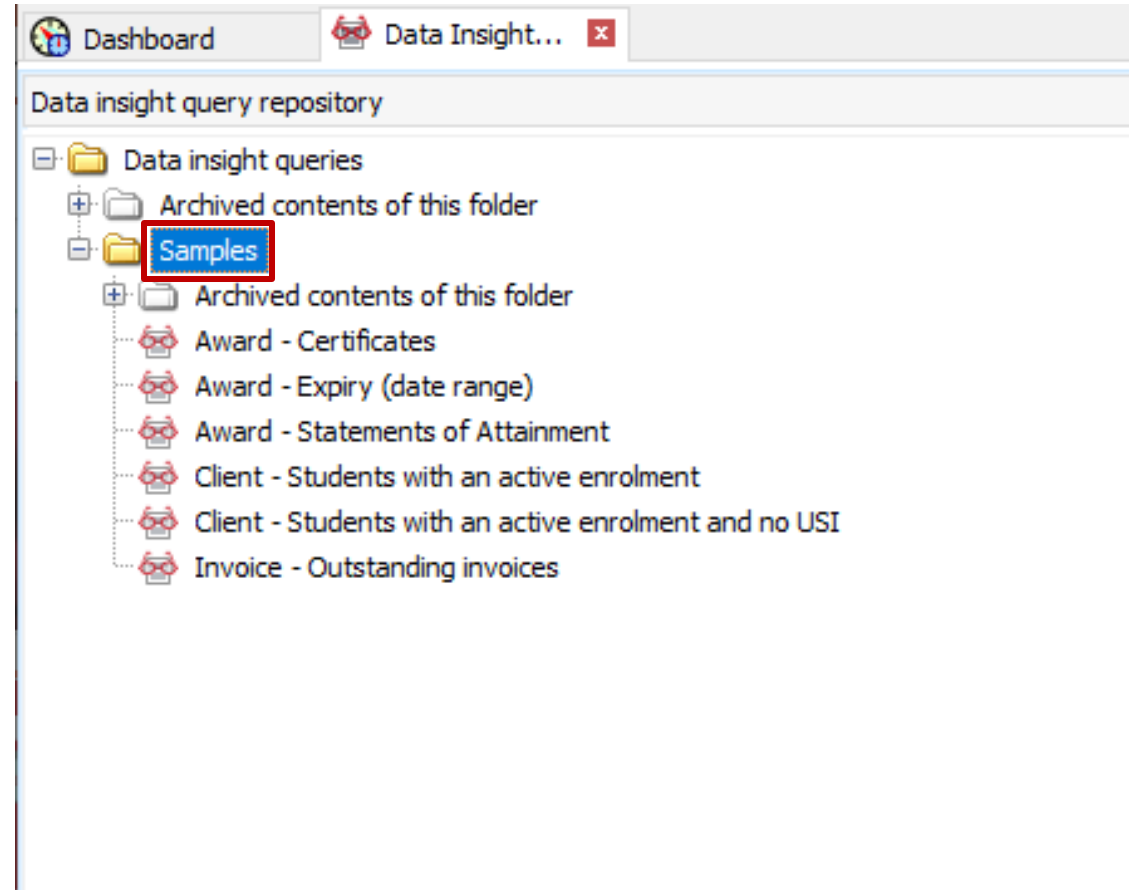
VETtrak has a range of '**Sample**' queries immediately available within the Data Insights Manager.

These serve as a standard set of generic queries that can be used right away.

You can even make copies of these items and amend them to suit your needs.

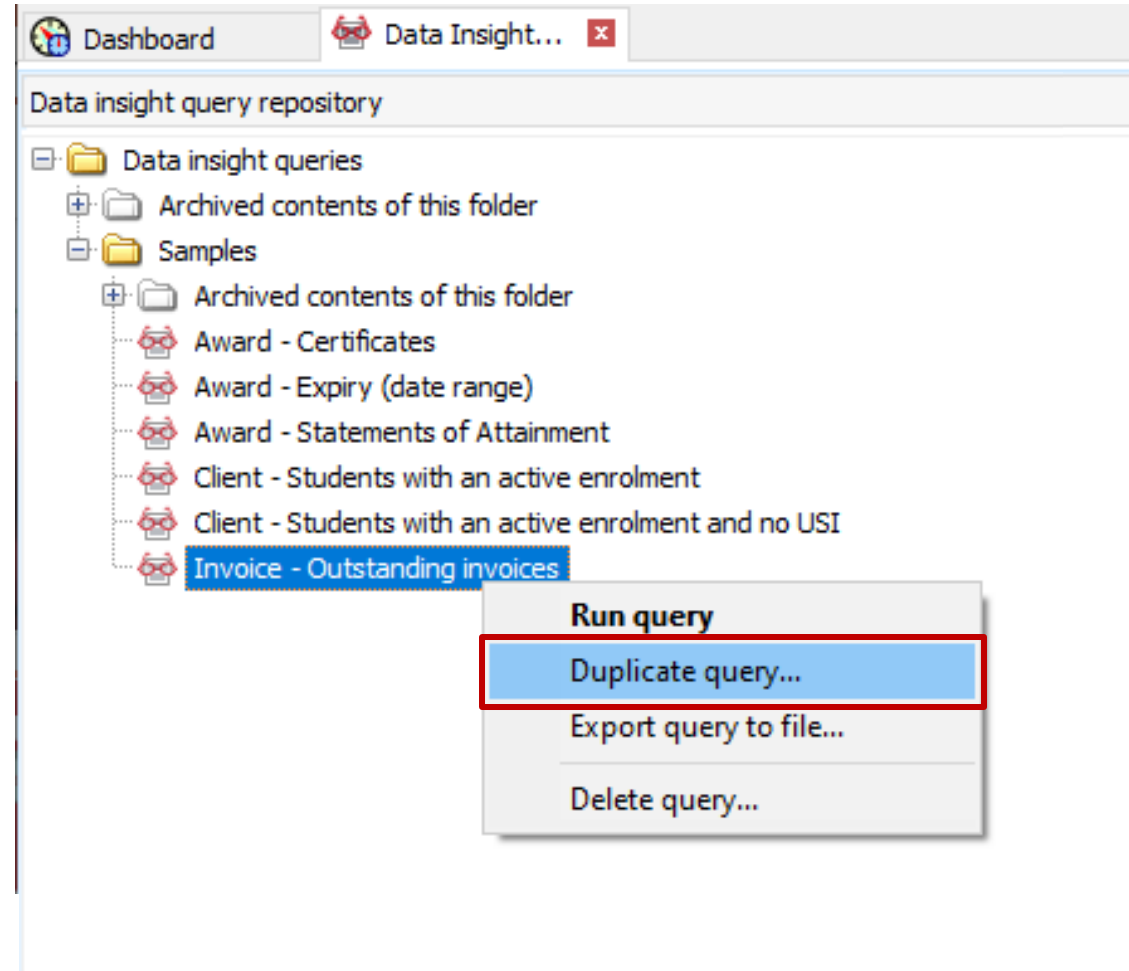
You can find these sample queries within the 'Samples' folder in your query list.

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



The advantage of being able to easily duplicate these queries is that it allows you to get a head start with making a new query.

Perhaps the sample query is already doing most of the work, and you just need one more criteria to match your need.



Item:

Creating a Simple Query

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

- Selecting a **Query On** option.

This dictates what kind of data you are intending to look at, i.e viewing **Award Details** or **Client Enrolments**.

- Selecting your **Query fields**.

Essentially choosing what information you wish to see, such as **Client Names**, **Enrolment Dates**, **Status**, etc.

- Setting up your **Must match criteria**.

Select what fields or details should be used as **Filtering Criteria** – for example, **Show me enrolments between these two dates**.

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

In order to record your query and keep it for future uses, giving it a name and hitting the **Save** button will make it appear in the left-hand list for when you next return to the Data Insight Manager.



Let's get our hands dirty!

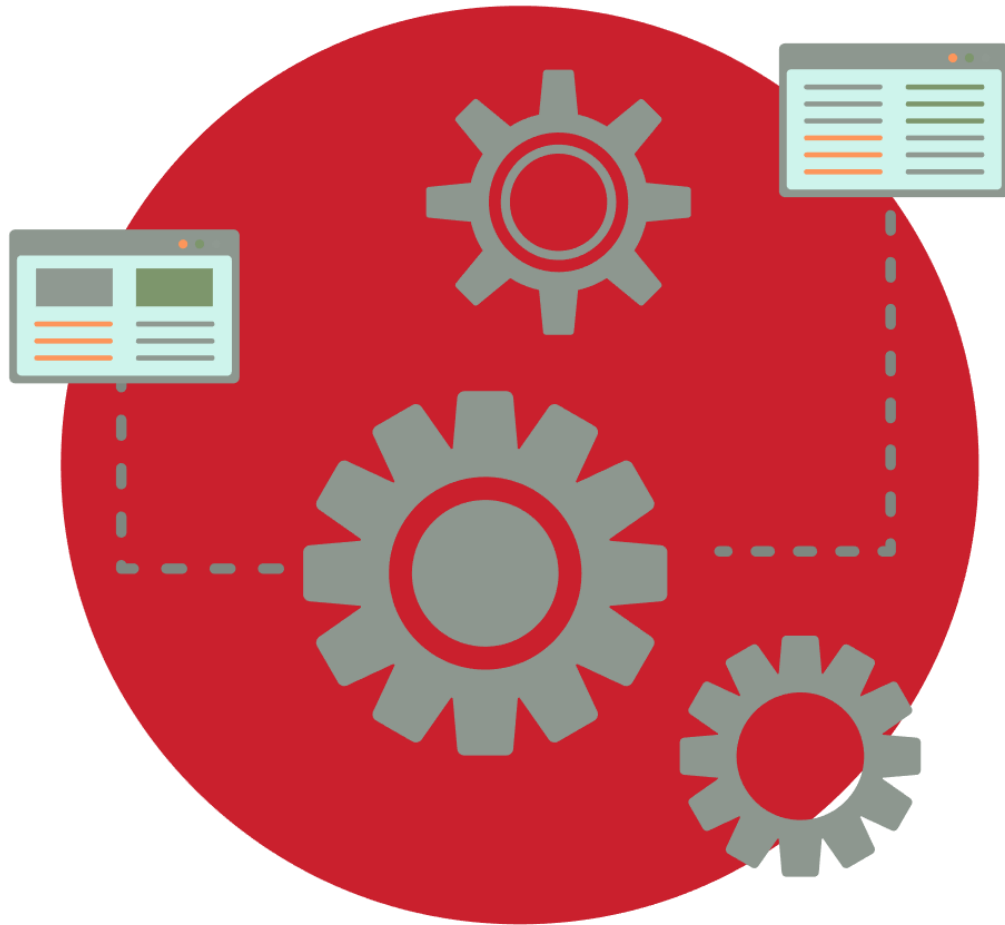
Let's make a new Data Insights Query.

For steps, click here: [Creating a New Data Insights Query](#)



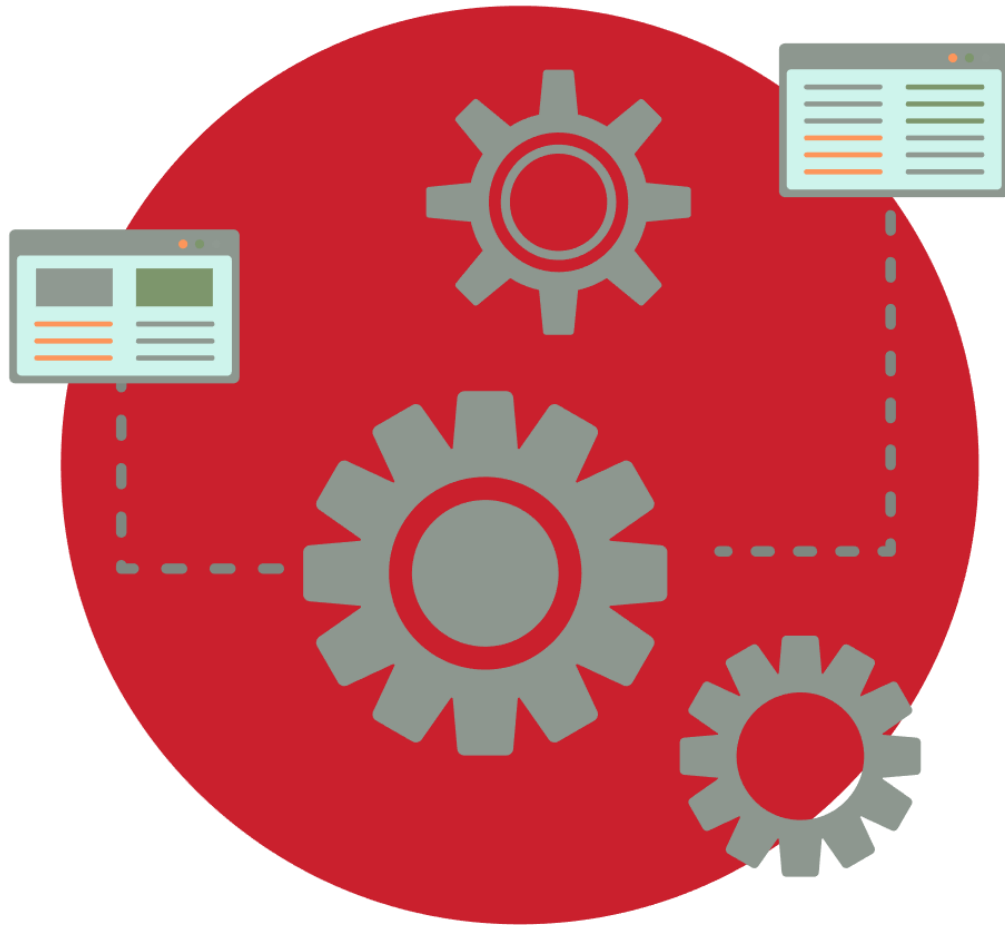
Item:

Advanced Query Techniques



Once you have established a simple query to return data, you can employ some advanced techniques to filter the data or create unique selection options.

- Consider data relations
- Create optional criteria
- Use filtering options on the output page
- Use 'Empty' criteria
- Organise/sort your queries via folders



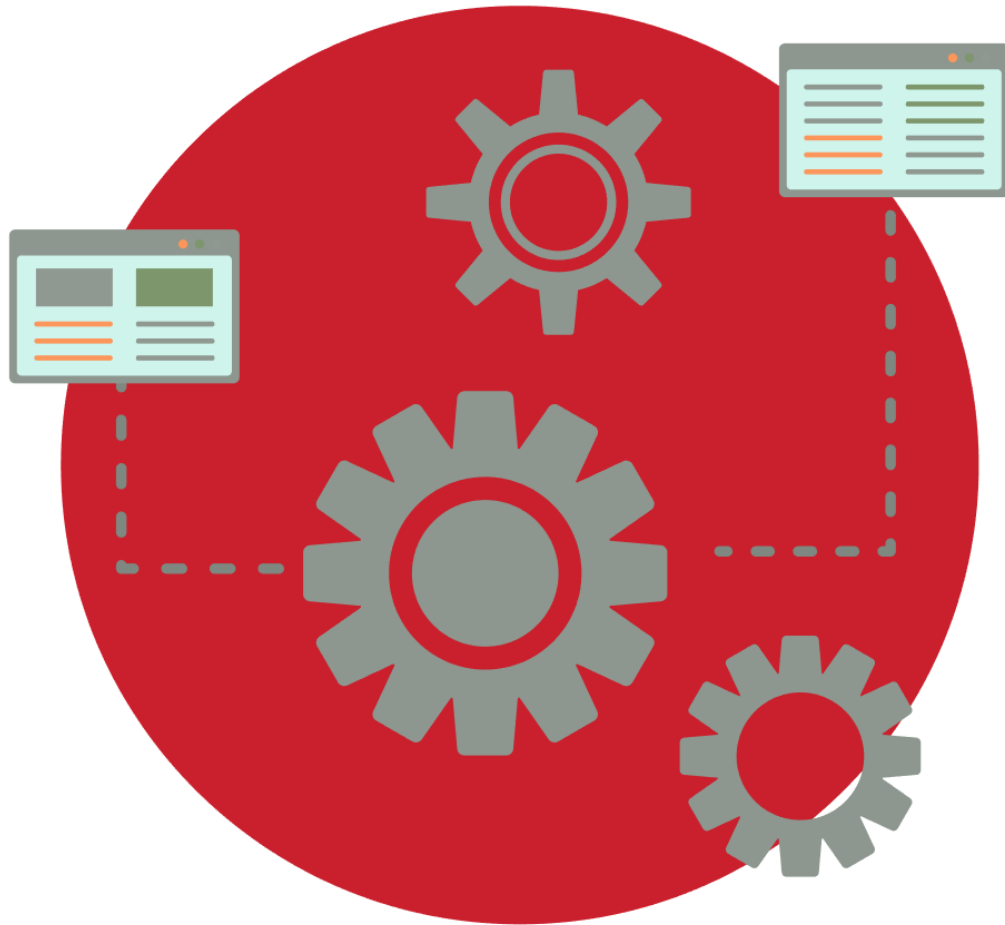
Here is a range of examples of using advanced query options:

- [Bulk Sending Awards via the Data Insights Manager](#)
- [Process: Bulk Update of Delivery Modes using the Data Insights Manager](#)
- [Process: Updating Enrolment Fields Using the Data Insights Manager](#)

Item:

The Action Menu

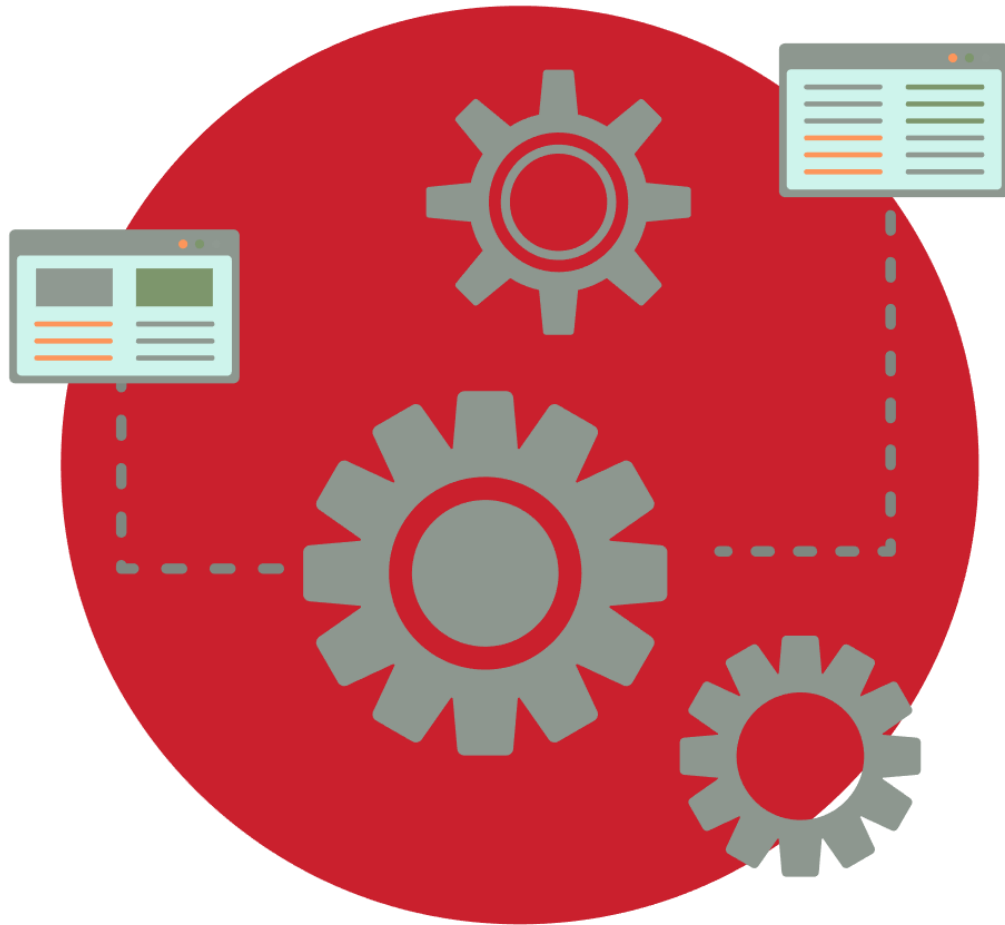




Once you have successfully run your query, you can choose what to do with the output. This is what truly separates Data Insights from running **VETtrak** reports.

In some cases, the purpose of the query was to return a set of data that you can then perform an **Action** on.

- Update a field against multiple records
- Run a special utility to add/edit details
- Contact a list of people you have generated
- Run a report on the data you have collected



The actions you can perform will differ depending on the data you are querying.

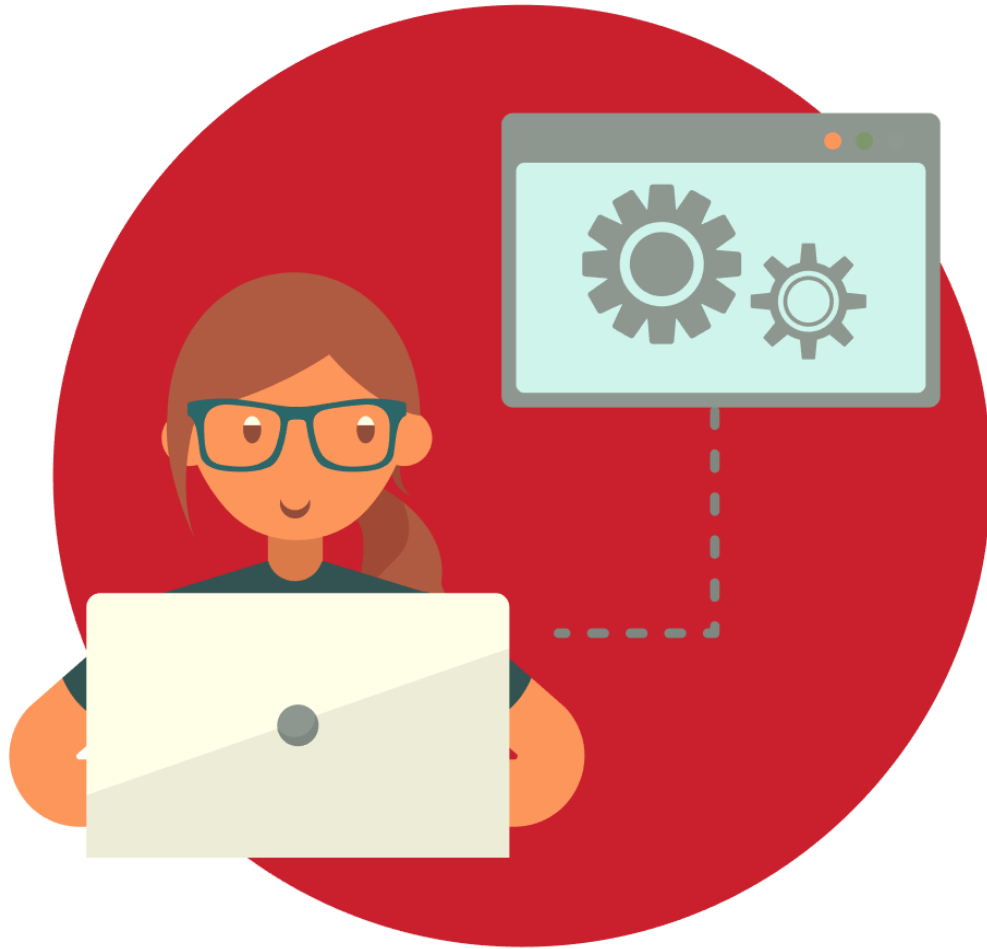
For example, you can only manipulate **Client** details if you are specifically looking at clients – similarly, you can only run **Award** reports if you are looking at award data specifically.

For more information, click here: [Performing Actions On Your Data Insights Query Output](#)



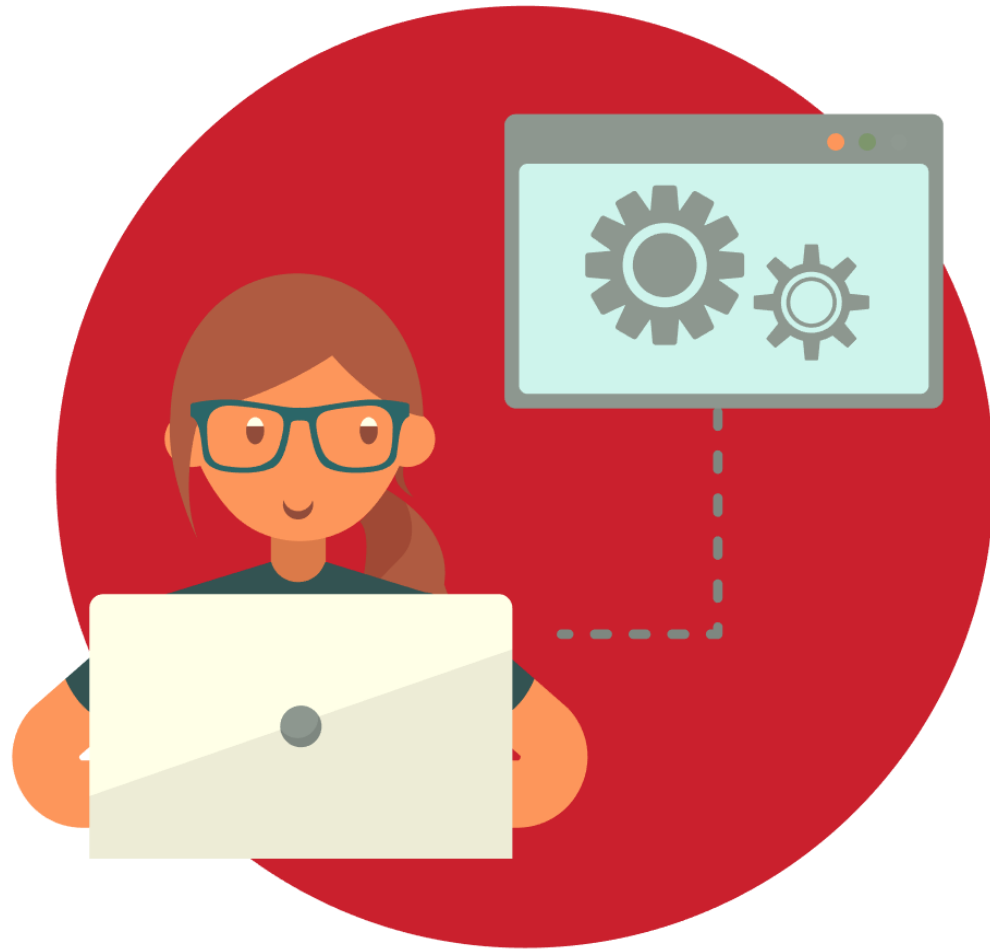
Item:

Exporting Data



There are a range of options to export your data. Much like the **Actions** menu, you can select to **Export** the output of your query!

- Simple exports to CSV/Excel formats
- PDF options
- Run reports and export those!



Exporting data into a CSV/Excel format can be incredibly useful if you make use of the Data Import Tools within **VETtrak**!

For example, exporting a range of Clients from your **VETtrak** system – editing the spreadsheet, then **importing** that spreadsheet to update those Student Records.

If you get stuck!



The **VETtrak** Help Centre has an entire section dedicated to using Data Insights!

- [Data Insights Manager Overview](#)
- [Creating a New Data Insights Query](#)
- [Performing Actions On Your Data Insights Query Output](#)
- [Data Insights Operators](#)
- [Importing a Data Insights Query](#)



See you next
time!

AcademyPlus