

**FileTrak** 

# FileTrak

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#### FileTrak 1 1.1 Introduction

This extension allows you to store and retrieve documents and files relating to various aspects of your training activities, by linking to them directly from various VETtrak wizards.

Files can be stored:

- On your local computer or network •
- On the internet
- In a separate document database (only available if you purchase the Document Database from OzSoft) •

Some advantages and disadvantages of the different methods are listed below:

### Files stored on local computer or network

#### Advantages:

• Files can be easily opened, edited and saved back to the same location.

### **Disadvantages:**

Files need to be maintained in their original locations. If any files or folders are moved or deleted, the links . to the documents will be lost.

### Files stored online or in document database

#### Advantages:

- All files kept together in a single location. •
- Files will still be accessible even if the original is moved or deleted. .
- Easy to keep and track multiple versions of the same file. •

#### **Disadvantages:**

Cannot open and save an edited file back to the same location; would need to save locally, edit and upload • the file again.

The entities that can have documents associated with them are:

- Award\* Event\* •
- Booking Class

Client

Contract

Employer

•

•

• •

- Enrolment •
  - Funding Model •
    - **Funding Source**

**Enrolled Unit** 

- Education History\* Group
  - Inventory Item .
- Placement
- Profile Programme

•

- Programme Type •
- **Purchasing Contract**
- Qualification
- Room
- Unit •

\* These items already have the ability to link documents in the standard VETtrak product. FileTrak allows an extra linking option in these cases.

•

•

- Occurrence Cost
- Organisation

Occurrence

Invoice

Location

Payment

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### **1.2 Setting Up FileTrak**

Before using FileTrak, you need to set up some information about the types of files you will be storing, and where they will be stored.

### 1.2.1 Preferences

To set the location where files will be stored, go to *File > Global preferences* and select *FileTrak preferences* at the bottom of the list.

VETtrak global preferences		23
Set VETtrak preferences		
Select the various tabs to display	that page. Set the preferences and press Finish to save them.	
		<b>V</b> /
Preference items 2	Default for new files 5 6	
General preferences	Absolute Relative Web Occ Db	
Compliance preferences	Base folder for relative paths	
Result Unit and Award	C:\Users\Public\Documents\Documents\Trainee Docs	
🐺 Programme preferences	FileTrak file types are now set up in the Configuration Manager	
Email preferences		
SMS preferences		
Gateway and Proxy		
Registration key		
🖶 Report preferences		
🙀 VETtrak version		
🏓 Document database		
🛃 FileTrak preferences		
Cancel Back Finish		

- 1. This section allows you to set the default setting for storing the path to your documents.
- 2. Choose *Absolute* if the files are always stored in the same place (such as a server), but may be accessed from different locations. This ensures that wherever you access VETtrak from, the path will always point directly to the location of the document.
- 3. Relative paths can be useful if you may want to move the location of your all files, but keep the same folder structure such as if you want to move them from one server to another, or from a local computer to a server. In this case you set the path to the base folder containing the documents, and then, when linking individual documents, you only need to specify the rest of the path to the document within the folder specified here.
- 4. If you are using relative paths, set the path to the base folder here.
- 5. Select *Web* if the files are to be stored online somewhere.
- 6. Available only if you have purchased the Document Database from OzSoft. If you select this option, a copy of the file will be stored in, and retrieved from, a separate document database. **NOTE:** You must <u>set up the connection to the document database</u> <sup>6</sup> for this feature to work.

## 1.2.2 File Types

In the Configuration Manager, there is a *Filetrak file types* node where you can set up the different types of files that you want to upload. These may be things such as enrolment forms, identification or receipts.

Note that there are three system-managed file types already set up in your database. These are required if you are using the Student Portal or Trainer Portal, and cannot be deleted or modified.

V FileTrak File Type Wizard		X
Enter file type details. Enter a name for the file type and an optional code and description. Press Next to co	ntinue.	<b>V</b> *
Name	Code	
Enrolment form	EF	
<ul> <li>This file type is inactive</li> <li>Description</li> <li>Scanned copy of enrolment form.</li> </ul>		*
		~
Cancel Back Next		

FileTrak

## **1.3 Setting Up the Document Database**

This section only applies if you have purchased the Document Database, which allows you to store all of your files in a single database location. Before you can use this feature, you need to complete the settings here so that VETtrak can access the database. Go to *File > Global preferences* and select *Document database*.

VETtrak global preferences		83
Set VETtrak preferences		
Select the various tabs to displa	y that page. Set the preferences and press Finish to save them.	V/
Preference items	Select database type	
General Preferences	Firebird     Microsoft SQL Server	
AVETMISS Preferences	Enter settings for database type	=
Result and Unit prefer	Select driver type	
Programme preferences	Firebird   SYSDBA	
Email preferences	Set server and path to database info about database p	<u>ath</u>
SMS preferences	192.168.10.59/3051:C:\VETtrak4-4-1-1\Data\VETtrakDocuments.gdb	
Gateway and Proxy		
Registration key	Test database connection Messages	
🖶 Report updates	Connected to DB OK	
VETtrak version	Database type (VETtrakDocuments)	^
🦻 Document database 👘	Test Now! verified OK	
🛃 FileTrak preferences		-
Cancel Back Finish		

- 1. Select the type of database you are using for your document database.
- 2. Enter the connection information for the database.
- 3. Click *Test Now!* to test the connection to the database.

## 1.4 Linking to Your Documents & Files

Documents can be linked via any wizard that has the document icon in the bottom right-hand corner. Click this button to open the Document Linking Wizard.

V Client Wizard						<b>. X</b>		
Enter client det	ails.							
		e client. Enter a surna m. Press Next to cont		name and division.	Optionally	V/		
Code Auto	Surname	Given n	ame	Other name	s	Circula		
VTR-00215	Aardvark	Alan		John		<u>S</u> ingle name		
Preferred name	Title	Date of Birth	Age	USI (unverified)	Exempt f	rom USI		
Al	Mr	11/08/1985 -	30	GTNSJTNH8E	Verify	now 🔻		
Division			Manage	er (reports to)		🛛 Clear		
Root division	I	•	Anderson, Olivia Mary (00036)					
Employer		🕒 Clear	Position	ı	🖽 Order	🔁 Clear		
Tiny Tots Ch	ildcare Centre		· 👔 🛛	nild Care Worker - C		•		
Client is a staff	member	Client is inactive	V Web	publish/Privacy rele	ease signed			
Username	Password			t web portal role	-	🖾 Clear		
aardv1	•••••					Ŧ		
Cancel Back	Next							

**NOTE:** This button is only available when editing an item. It will not appear in the wizard when you are adding a new item with that wizard. If you want to link a document to something that you are newly creating, you will first need to continue through the wizard to save the item, and then edit the item to open the wizard again and link the document.

Enter file li		-		quired. Press Next to co	ntinue.				۶
Item inform Type Client	nation		tails	0.00015)					
Documents/	Filos	Ad	ardvark, Alan John [Al]	(VIR-00215)				2	🖽 Add
Link style	File type	Name	Filename		Desc	Last user	Last date	Open Edit	_
				<no data="" dis<="" th="" to=""><th>play&gt;</th><th></th><th></th><th></th><th></th></no>	play>				
Relative fo C:\Users\		nts\Documen	ts\Trainee Docs						
Close									

FileTrak

- 1. These fields are for information only and cannot be changed.
- 2. Click the *Add* button to link a new document. The File Link Wizette will open.

🔀 File Link Wizette	8						
Add/Edit file link							
Select the link style, file type and complete file name/URL (include file path where appropriate).	<b>V</b>						
Link style 3 File type 4							
Relative   Identification	•						
File location and name/URL	5						
\Student ID Scans\Aardvark-Alan-VTR-00215.pdf							
Name 6							
Aardvark-Alan-VTR-00215.pdf							
Description							
Alan Aardvark Driver's Licence							
Cancel Finish							

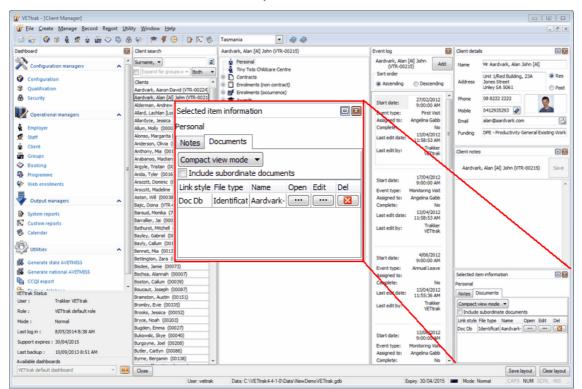
- 3. Select the type of file path. This will default to the type set in the <u>Global Preferences Wizard</u>, but can be changed if necessary.
- 4. Select what kind of file you are linking. In this case we are linking a scan of the client's identification document to their client profile.
- 5. Click the button and navigate to the location of the file.
- 6. The name will be automatically filled in with the name of the document you are linking, or you can type over it to enter a name of your choice.
- 7. Optionally, you can add notes about this document.
- 8. Click *Finish*.

-									
FileTrak o	document link	ing wizard					<b>×</b>		
Enter file li	Enter file links								
Press Add to	add a new line	in the grid. Bro	owse for files as required. Press Next to continue.				V		
Item inform	ation								
Type		Details							
Client		Aardv	ark, Alan John [Al] (VTR-00215)						
Documents/F	Files						Add		
Link style	File type	Name	Filename	Desc	Last user	Last date	Open Edit Del		
Relative	Identification	Aardvark-Alar	\Student ID Scans\Aardvark-Alan-VTR-00215.pdf	Alan Aardvarl	VETtrak, Trak	7/05/2014 2:	··· · ·· 🛛		
Relative fol					(	9 10			
C:\Users\P	ublic\Document	s\Documents\Ti	rainee Docs						
Close									

- 9. The information in these fields cannot be changed this information is saved automatically for audit purposes.
- 10. Later, when you want to access the document you have linked, click the Open button to open it.
- 11. Click the *Edit* button to make changes to the file information. Note that this button is **not** for editing the document itself. To edit a linked document, you would need to first open it using the *Open* button.

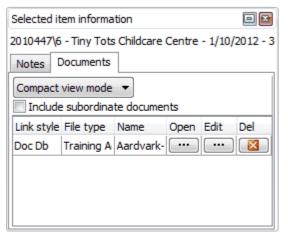
### 1.5 Viewing the Documents Grid

In the Client, Employer, Staff, and Programme Managers, a grid has been added to the Notes panel to display all the documents associated with whichever item you have clicked on.



The grid has a tickbox to *Include subordinate documents*. If this is left unticked, the document grid will show only documents relating to the item you have currently clicked on. If it is ticked, documents relating to anything under the selected item in the tree will also be included.

Below are examples of what we might see in the document grid when we click on a client's contract, showing the grid both with and without subordinates included.



Selected it	em informa	tion			• 🛙				
2010447\6 - Tiny Tots Childcare Centre - 1/10/2012 - 3									
Notes Documents									
Compact view mode -									
🔽 Include	e subordina	te documer	nts						
Link style	File type	Name	Open	Edit	Del				
Doc Db	Training A	Aardvark-	•••	•••					
Doc Db	Enrolment	ENRO-Aar	••••	•••					
Doc Db	Student A	CHCCN30	•••	•••					
Doc Db	Student A	CHCCN30	•••	•••					

When *Include subordinate* is not ticked, we only see documents relating directly to the contract.

When Include subordinate is ticked, we also see documents relating to the enrolment and units underneath that contract.

It is possible to drag this panel elsewhere on the screen and dock it at whichever edge of the screen you prefer. For example, dragging it into the centre panel and docking it against the bottom edge of the screen gives more room to see the grid and make use of the different viewing modes available.

₩ VETtrak - [Client Manager]			
<mark>₩ E</mark> ile <u>C</u> reate <u>M</u> anage <u>R</u> ecor	d Report <u>U</u> tility <u>W</u> indow <u>H</u> elp		_ 8
🗟 🕹 😵 📽 🛔 🧟 👘	🌇 🗇 🖶 🕀 🤣 📂 🌹 🕢 📴 💽 🍪 Tasmania 🛛 💽 🥔 🥔		
Client search	Aardvark, Alan [Al] John (VTR-00215)	Event log 🛛 🖾	Client details
Surname, 👻	🕆 🎍 Personal	Aardvark, Alan [Al] John Add	Name Mr Aardvark, Alan John [Al]
Expand for groups o 👻 Both 💌	Tiny Tots Childcare Centre     Tots Childcare Centre     Tots Childcare Centre	(VTR-00215) Add Sort order	Unit 1/Red Building, 23A    Res
Clients	Image: Contracts Image: Im	n	Address Jones Street
Aardvark, Aaron David (VTR-00224)	🕀 🔲 Enrolments (non contract)		Unley SA 5061 O Pos
Aardvark, Alan [Al] John (VTR-0021 Alderman, Andrew (00231)	🕀 💕 Enrolments (occurrence)	Start date: 27/02/2012 9:00:00 AM	Phone 08 8222 2222
Allard, Lachlan [Lockie] (00024)	Awards	Event type: First Visit	Email alan@aardvark.com
Allardyce, Jessica (00088)	Education history     Invoices	Assigned to: Angelina Gabb	Funding DPE - Productivity General Existing Wor
Allum, Molly (00005)	Invoices (as item)	Complete: No	
Alonso, Margarita [Margie] Luisa (VT	🕀 🙀 Groups	Last edit date: 13/04/2012 11:58:53 AM	Client notes
Anderson, Olivia (00036) Anthony, Mia (00197)		Last edit by: Trakker	Aardvark, Alan [Al] John (VTR-00215)
Arabanoo, Mackenzie (00112)		VETtrak	Aardvark, Alan [Al] John (VTR-00215) Save
Argyle, Tristan (00009)	B Partice (all)		
Arida, Tyler (00163)	🕀 🖶 Sent email	Start date: 17/04/2012	
Arscott, Dominic (00029) Arscott, Madeline (00196)	🕀 🛷 Sent SMS	Event type: Monitoring Visit	
Asth, Will (00038)	E Waitisted programmes     Would be completed	Assigned to: Angelina Gabb	>
Bajic, Doina (VTR-00266)		Complete: No	
Baroud, Monika (72787)		Last edit date: 13/04/2012 11:58:53 AM	
Barrallier, Jai (00033)		Teakhee	
Bathurst, Mitchell (00114) Bayley, Gabriel (00123)		Last edit by: VETtrak	
Bayly, Callum (00117)			
Bennet, Mia (00130)		4/06/2012	Selected item information
Bettington, Zara (00150)		Start date: 9:00:00 AM	2010447\6 - Tiny Tots Childcare Centre - 1/10/2012 -
Bisdee, Jamie (00073) Bochsa, Alannah (00007)		Event type: Annual Leave	Notes Documents
Boston, Callum (00039)		Assigned to: Complete: No	
Boucaut, Joseph (00087)		13/04/2012	Compact view mode  Vinclude subordinate documents
Bramston, Austin (00151)		11:55:36 AM	✓ Include subordinate documents Link style File type Name Open Edit Del
Bromby, Evie (00335) Brooks, Jessica (00052)		Last edit by: VETtrak	Doc Db Training A Aardvark- ···· 🔀
Brooks, Jessica (00052) Bryce, Noah (00203)			Doc Db Enrolment ENRO-Aar ··· ··· ··· ···
Bugden, Emma (00027)			Doc Db Student A CHCCN30
Bukowski, Skye (00040)	· · · · · · · · · · · · · · · · · · ·	Start date: 13/06/2012 9:00:00 AM	Doc Db Student A CHCCN30 💌 🛛
Rurgovine Toel (00208)			Save layout Clear layou
0.000	User: vettrak Data: C:\VETtrak 4-4-1-0\Data\NewDemoVETtrak ord	Eveniny: 20/04/2015	
	User: vettrak Data: C:\VETtrak4-4-1-0\Data\NewDemoVETtrak.gdt	Expiry: 30/04/2015	Mode: Normal CAPS NUM SCRL INS

There are three different viewing modes available, depending on how much information you want to be able to see:

### Compact view just shows the basic details:

Selected item information			•
2010447\6 - Tiny Tots Childcare Cent	re - 1/10/2012 - 30/09/2013 - (CHC20108) Certificate II in C	Community Services (Child Care)	
Notes Documents			
Compact view mode 👻 🔽 Include	subordinate documents		
Link style	File type	Name	Open Edit Del
Doc Db	Training Agreement	Aardvark-Alan-2010447-6.pdf	··· ·· 🛛
Doc Db	Enrolment Form	ENRO-Aardvark-AlanVTR-00215.pdf	··· ·· 🛛
Doc Db	Student Assignments	CHCCN301A-VTR-00215-1	··· ·· 🛛
Doc Db	Student Assignments	CHCCN301A-VTR-00215-1A	··· ·· 🛛
	· · · · · · · · · · · · · · · · · · ·		· · ·

#### Medium view shows most of the information about each file, excluding the description:

Selected item information									
2010447\6 - Ti	ny Tots Childcare Ce	ntre - 1/10/2012	- 30/09/2013 - (CHC20108) Certificate II in Community Services (Chile	d Care)					
Notes Documents									
Medium view	mode 🔻 🔽 Inclue	de subordinate do	cuments						
Link style	File type	Name	Filename	Desc	Last user	Last date	Open	Edit	Del
Doc Db	Training Agreeme	Aardvark-Alan-2	C:\Users\Public\Documents\Documents\Trainee Docs\Contracts\Aar	k	VETtrak, Trakker	8/05/2014 2:10:		•••	
Doc Db	Enrolment Form	ENRO-Aardvark-	C: \Users\Public\Documents\Documents\Trainee Docs\Enrolment For		VETtrak, Trakker	8/05/2014 2:12:		•••	
Doc Db	Student Assignme	CHCCN301A-VTR	C: \Users \Public \Documents \Documents \Trainee Docs \Assignments \C		VETtrak, Trakker	8/05/2014 9:53:	•••	•••	
			C: \Users \Public \Documents \Documents \Trainee Docs \Assignments \C			10/05/001110	···· )	····	

**Large view** is most useful if you are including subordinate documents in your grid view. It shows all information relating to each file, including indicating which item each document is attached to.

010447\6	Tiny Tots Childcare Cent	re - 1/10/201	12 - 30/09/2013	3 - (CHC20108	) Certificate II in Community Services (Child Care)						
	cuments			(01020100							
Notes Doo											
Large view i	arge view mode 👻 🗹 Include subordinate documents										
Entity	Description	Link style	File type	Name	Filename	Desc	Last user	Last date	Open	Edit	Del
Contract	Aardvark, Alan John (1	Doc Db	Training Agre	Aardvark-Ala	C: \Users\Public\Documents\Documents\Trainee Docs		VETtrak, Tral	8/05/2014 2		•••	
Enrolment (	1/10/2012-30/09/2013	Doc Db	Enrolment Fo	ENRO-Aardva	C: \Users\Public\Documents\Documents\Trainee Docs		VETtrak, Tral	8/05/2014 2		•••	
Enrolled unit	CHCCN301A - Aardvark	Doc Db	Student Assig	CHCCN301A-	C: \Users\Public\Documents\Documents\Trainee Docs		VETtrak, Tral	8/05/2014 9	•••	•••	
Enrolled unit	CHCCN301A - Aardvark	Doc Db	Student Assic	CHCCN301A-	C:\Users\Public\Documents\Documents\Trainee Docs	More details	VETtrak, Tral	12/05/2014	··· )	····	

### **1.6 Example - Linking an Enrolment Form to an Enrolment**

For this example, we will use the following scenario:

- We have PDF scans of physical enrolment forms that our clients have filled out, and we want to link these to each client's enrolment.
- We are a small RTO with all our files currently stored on a single computer, but plan to expand our IT infrastructure soon and store our files on a server, where they can be accessed from multiple computers.
- We are currently storing the files on our computer in the My Documents area, under a folder called "Trainee Docs".

### Step 1 - Configure FileTrak

Open the FileTrak preferences under File > Global preferences.

As we know we will be moving the files in the near future, we want to use the relative path to the "Trainee Docs" folder where we are storing all our files. This will allow us to still access our files even if we pick up the Trainee Docs folder and move it to a different location.

VETtrak global preferences Set VETtrak preferences Select the various tabs to displa	y that page. Set the preferences and press Fi	nish to save them.
Preference items        General Preferences        AVETMISS Preferences        Result and Unit prefer        Programme preferences	Default for new files 1 Absolute Relative V Base folder for relative paths C:\Users\Public\Documents\Documents\Trail File types	2
<ul> <li>Email preferences</li> <li>SMS preferences</li> <li>Gateway and Proxy</li> <li>Registration key</li> <li>Report updates</li> <li>VETtrak version</li> <li>Document database</li> <li>FileTrak preferences</li> </ul>	App Signature Attendance Repot	Downloads     Favorites     Links     Wy Backup Files     Wy Documents     Wy Documents     Archived     Archived     Attendance     Awards     Claims     Megan's Stuff     Misc     Trainee Docs     Visits     Wy Music     P     My Pictures     T
		OK Cancel

### 1. Select Relative ...

- 2. ...click this button...
- 3. ...and navigate to the folder where your documents are currently stored. **NOTE:** When we later move our files to a server, we will need to come back to this wizard and change this base folder.
- 4. Make sure you have set up the Enrolment Form as one of the types of documents you will be wanting to link.

### Step 2 - Link the Document

To link the enrolment form to your client's enrolment, find the client in the Client Manager, right-click on their enrolment, and select *Edit enrolment*. Then click the document icon at the bottom of the Enrolment Wizard.

M Enrolment Wizard : Aardvark, Alan John (00412)	<b>X</b>						
Enter details. Set the start and finish dates and the location of the enrolment. Select a qualific	ration or course from the list						
(optional). Press Next to continue.							
State rules in effect : Victoria	State Reportable Enrolment						
Start date Finish date Location Load all Coder	Reportability options						
1/08/2015 ▼ 31/07/2016 ▼ 🔝 Melbourne (3000) ▼	Report to state body						
Organisation Division	Report to national body (NCVER)						
VTA - VETtrak Academy   Root division  Do not report this enrolment							
Select contract to attach enrolment to (optional)	Dear 2						
	•						
Training package qualifications 📃 Show courses in list	💷 Order) 🛅 Clear						
BSB20107 - Certificate II in Business	•						
Enrolment status Date of status change Cancellation reason	🖾 Clear						
Active (Commencement)  v 1/08/2015  v	•						
Description							
Cancel Back Next							

Enter file links         Press Add to add a new line in the grid. Browse for files as required. Press Next to continue.         Item information         Type         Details         Enrolment (Contract and Non-coi         1/08/2015-31/07/2016         Documents/Files         Link style         File type         Name         File location and name/URL         File location and name/URL         File location and name/URL         File location and name/URL         Broolment Form         File location and name/URL         Broolment Forms/ENRO-Aardvark-AlanVTR-00215.pdf         Description         G         Relative folder         C: Users \Public \Documents\Trainee Docs	V FileTrak document linking wiz	ard					83
Item information       Details         Type       Details         Enrolment (Contract and Non-coi 1/08/2015-31/07/2016 BE       Add/Edit file link         Documents/Files       Link style         Link style       File type         Name       File location and name/URL         File location and name/URL       File location and name/URL         %       Name         ENRO-Aardvark-AlanVTR-00215.pdf       Description         Relative folder       7	Enter file links						
Item information       Details         Type       Details         Enrolment (Contract and Non-col 1/08/2015-31/07/2016 Bs       Add/Edit file link         Documents/Files       Ink style         Link style       File type         Sect the link style       3         Relative       Enrolment Form         File location and name/URL       4         Venrolment Forms VENRO-Aardvark-AlanVTR-00215.pdf       4         Name       ENRO-Aardvark-AlanVTR-00215.pdf         Description       7	Press Add to add a new line in the g	grid. Browse for files as rea	uired. Press Next to continue.				<b>V</b> /
Item information       Details         Type       Details         Enrolment (Contract and Non-col 1/08/2015-31/07/2016 Bs       Add/Edit file link         Documents/Files       Ink style         Link style       File type         Sect the link style       3         Relative       Enrolment Form         File location and name/URL       4         Venrolment Forms VENRO-Aardvark-AlanVTR-00215.pdf       4         Name       ENRO-Aardvark-AlanVTR-00215.pdf         Description       7			V File Link Wizette	23			
Enrolment (Contract and Non-col 1/08/2015-31/07/2016 B5         Documents/Files         Link style       File type         Name         File location and name/URL         Yendem to File         Name         ENRO-Aardvark-AlanVTR-00215.pdf         Description         Relative folder		Details	Add/Edit file link				
Link style File type Name Filename Link style File type Name Filename Link style File type File type Last date Open Edit Del Relative Enrolment Form File location and name/URL File location and name/URL File location and name/URL File Name ENRO-Aardvark-AlanVTR-00215.pdf Description Relative folder		1/08/2015-31/07/2016 BS		V/			
Link style     File type     Name     File name     Last date     Open     Edit     Del       5     File location and name/URL     File location and name/URL     4     4       6     Name     6     Name       ENRO-Aardvark-AlanVTR-00215.pdf     Description	Documents/Files		$\frac{2}{3}$	_			Add
VEnrolment Forms VENRO-Aardvark-AlanVTR-00215.pdf	Link style File type Name	Filename		•	Last date	Open Edit	Del
6 Name ENRO-Aardvark-AlanVTR-00215.pdf Description		5	<u> </u>		<u>4</u>		
ENRO-Aardvark-AlanVTR-00215.pdf Description Relative folder 7		~	Enrolment Forms ENRO-Aardvark-AlanVTR-00215	.pdf			
Relative folder		6	Name				
Relative folder			ENRO-Aardvark-AlanVTR-00215.pdf				
			Description				
C: Users Public Wocuments Vocuments (Trainee Docs							
	C: \Users \Public \Documents \Docun	nents\Trainee Docs	<u>Cancel</u> Finish				
Qlose	Close						

1. Click the *Add* button to open the File Link Wizette.

- 2. Leave the Link Style as *Relative*, as per our settings above.
- 3. Select the Enrolment Form file type.
- 4. Navigate to the location where you have stored their form. In this case we have all enrolments stored in a sub-folder of Trainee Docs, called Enrolment Forms.
- 5. Note that as we are using relative paths, only the last part of the path to the document is stored. This means that if we later move all of our trainee documents to another location, we just need to go back to the FileTrak Configuration Wizard and change the base path. As long as the same folder structure is used, all files should then be accessible in the new location.
- 6. The name of the file will be automatically filled in here, but you can change it to something else if you want.
- 7. Click Finish.

## **1.7 Example - Saving a File in the Document Database**

If you prefer to store all your documents in a single location, you can purchase the Document Database feature. This allows you to store all of your files in a database, separate to the main VETtrak database. This means that a separate copy of the file will be created and stored, which will remain available even if the original document is deleted.

In this scenario, we are wanting to store copies of all student assignments in a database. If students are asked to resubmit an assignment, we want to be able to track this, so we want to store the different versions of the assignment.

### Step 1 - Configure FileTrak

Open the FileTrak preferences under *File > Global preferences*.

VETtrak global preferenc					23
Set VETtrak preferences					_
Select the various tabs to disp	play that page. Set the preferences an	id press Finish to sa	ave them	1.	VÆ
					<b>.</b>
Preference items	Default for new files			(1)	
General Preferences	O Absolute O Relative	🔘 Web	۲	) Doc Db	
	Base folder for relative paths				
AVETMISS Preferences	C:\Users\Public\Documents\Docur	ments\Trainee Doc	5		
Result and Unit prefer.			-		
Programme preferences	File types				Add
	Name	Code	Active		Del
Email preferences	App Signature	AppSign		Signature	
SMS preferences				-	
Gateway and Proxy	Attendance Reports	ATT	<b>V</b>	Class atter	
	Enrolment Form	ENRO	<b>V</b> E	Enrolment	
🖶 Registration key	Identification	ID	<b>V</b>	Scan of cli	
🖶 Report updates 🔔	Student Assignments	SA	<b>V</b>	Assignmen	
📲 VETtrak version 🤇	)				
🦻 Document database					
🛃 FileTrak preferences					
Cancel Back Finish					

- 1. Select Doc Db.
- 2. Make sure you have set up Student Assignments as one of the types of documents you will be wanting to link.
- 3. Go to the Document Database section and set up the database 61.

### Step 2 - Upload the Documents

We want to store the assignments against the enrolled unit they apply to, so we find the person's enrolment in the Client Manager and expand it to find the appropriate unit.

To store information against a particular unit, we use the comment feature, so we right-click on the unit and select *Edit comment*.

Aardvark, Alan [Al] John (VTR-00215)	
Events (linked to contract) Placements (linked to contract) Image: Placements (linked to contract) Image: Placements (linked to contract) Image: Placement (linked occurrence enrolments) Image: Placement (linked to enrolment)	12 - 30/09/2013 - (CHC20108) Certificate II in Community 0108) Certificate II in Community Services (Child Care)
<ul> <li>Placements (linked to enrolment)</li> <li>CHCCN301A) Ensure health and safety c</li> <li>CHCCOM201C) Communicate with people</li> <li>CHCCS211A) Prepare for work in the cor</li> <li>CHCCC301A) Support the development c</li> <li>CHCCC301B) Communicate with children</li> <li>CHCCHC301A) Follow safety procedures</li> <li>CHCORG201A) Follow policies, procedures</li> <li>CHCORG202C) Work with others (No res</li> <li>CHCCPR301A) Provide experiences to sup</li> <li>CHCRF301D) Work effectively with famili</li> <li>(HLTCSD306B) Respond effectively to difficult</li> </ul>	Record element results       sult) (0)         Edit comment       Edit contact record         Show contact record report       Withdraw from unit/module         Reset unit/module result       Remove unit/module

Then click the document icon in the corner of the Result Comment Wizard:

Result Comment Wizard	×
Enter result comment.	
Enter or modify the comment that is held against this result. Press Next to continue.	<b>V</b>
Comment	
	~
Cancel Back Next	R

V FileTrak document linking wizard		8
Enter file links		
Press Add to add a new line in the grid. B	V File Link Wizette	V
	Add/Edit file link	
Item information Type Details Enrolled unit CHCC	Select the link style, file type and complete file name/URL (include file path where appropriate).	
Documents/Files	Doc Db 🔹 Student Assignments 👻	Add 🛛
Link style File type Name	File location and name/URL 4 C:\Users\Public\Documents\Documents\Trainee Docs\/ Name 5 CHCCN301A-VTR-00215-1 Description 6 Cancel Finish	Last user Last date Open Edit Del
		]
C: \Users\Public\Documents\Documents\T	rainee Docs	
Close		

- 1. Click the *Add* button to open the File Link Wizette.
- 2. Leave the Link Style as *Doc Db*, as per our settings above.
- 3. Select the Student Assignments file type.
- 4. Navigate to the location where you have saved their assignment.
- 5. The name of the file will be automatically filled in here, but you can change it to something else if you want. We are using a naming system that takes the unit code, the student code, and the number 1 to indicate it is the first assignment for the unit, but you can use whatever naming system makes sense to you.
- 6. Click Finish.

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We can now see the assignment next time we open the wizard. Click **Open** to view the file, or **Edit** to change the details.

		ing wizard						83
nterfile	links							
ress Add	to add a new line	in the grid. Browse for file	es as required. Press Next to continue.					<b>V</b> /
Item infor	mation							
Type	ind don	Details						
Enrolled u	Enrolled unit CHCCN301A - Aardvark, Alan (VTR-00215) [491]							
ocuments	/Files							🖽 Add
ink style	File type	Name	Filename	Desc	Last user	Last date O	pen Edit	Del
oc Db	Student Assig	CHCCN301A-VTR-00215-	1 C:\Users\Public\Documents\Documen	ts\Train:	VETtrak, Tr	8/05/2014		
Relative for C: \Users		s\Documents\Trainee Docs	s					

Note that with documents stored in the document database, you cannot later edit the Link Style or File Location, as the link to the original file location no longer applies - there is now a separate copy of the file stored in the database.

🔀 File Link Wizette	X
Add/Edit file link	
Select the link style,file name/URL (include file p	type and complete file Nath where appropriate).
Link style	File type
Doc Db 💌	Student Assignments 🔹
File location and name/L	JRL
C:\Users\Public\Docume	ents\Documents\Trainee Docs\/
Name	
CHCCN301A-VTR-0021	5-1
Description	
Cancel Finish	

Later, if the student resubmits the assignment, we click the *Add* button in the Document Linking Wizard again to link the new copy of the assignment.

🚺 File Link Wizette	X
Add/Edit file link	
Select the link style, file ty name/URL (include file pat	
Link style F	ile type
Doc Db 🔹 S	Student Assignments 🔹 👻
File location and name/URI	L
C:\Users\Public\Document	s\Documents\Trainee Docs\/
Name CHCCN301A-VTR-00215	IA
Description	
More details added to que	stions 3 and 5.
Cancel Finish	

This time we have added the letter A to the end of the name to indicate it is a revised version of the assignment. (We could continue to save subsequent versions as versions B, C, etc. if applicable.) We have also added a description to show what changes we asked the student to make to the assignment.

We can now see in the wizard that there are multiple versions of the file saved, and the dates on which each one was saved:

🕼 FileTrak i	document linki	ing wizard							8
Enter file li									
Press Add to	o add a new line	in the grid. Browse for files as re	equired. Press Next to continue.						۷⁄
-Item inform	nation								
Туре		Details							
Enrolled ur	nit	CHCCN301A - Aardvark	, Alan (VTR-00215) [491]						
Documents/	Files								Add
Link style	File type	Name	Filename	Desc	Last user	Last date	Open	Edit	Del
Doc Db	Student Assig	CHCCN301A-VTR-00215-1	C: \Users \Public \Documents \Documents \T		VETtrak, Tr	8/05/2014	•••	•••	
Doc Db	Student Assia	CHCCN301A-VTR-00215-1A	C: \Users\Public\Documents\Documents\T	More details	VETtrak, Tr	12/05/2014			
Relative fo		s\Documents\Trainee Docs							
Close									

### NOTES:

- You cannot open and edit a file and then save the edited version back into the database. If you need to edit ٠ a file stored in the database, you would need to open it, save it on your computer, and then reupload the edited version of the file.
- This method allows you to see the full version history of a file, even if the original versions of it have been • edited or deleted from where they were created. Once uploaded, there is no link between the version of the file in the database and the original on your computer.
- Take care when deleting records that are saved by this method, as deleting a record will also delete the • document itself from the database. Ensure that you still have the original file, or that you really do no longer need the document, before deleting a record from this wizard.