

**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.<br>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  |         |            |

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## **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<br>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<br>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<br>Type<br>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<br>C:\Users\      |           | nts\Documen | ts\Trainee Docs         |  |         |           |           |           |       |
| Close                         |           |             |                         |  |         |           |           |           |       |

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- 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<br>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   |          |  |  |  |  |  |  |

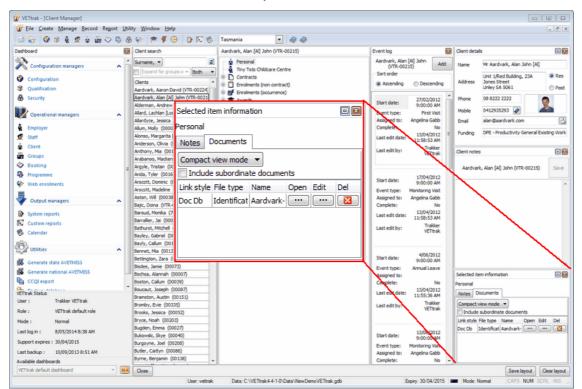
- 3. Select the type of file path. This will default to the type set in the <u>Global Preferences Wizard</u>, but can be changed if necessary.
- 4. Select what kind of file you are linking. In this case we are linking a scan of the client's identification document to their client profile.
- 5. Click 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.

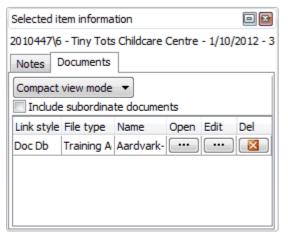
### 1.5 Viewing the Documents Grid

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<br>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<br>Alderman, Andrew (00231)   | 🕀 💕 Enrolments (occurrence)   | Start date: 27/02/2012<br>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<br>11:58:53 AM | Client notes   |
| Anderson, Olivia (00036)<br>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)<br>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<br>11:58:53 AM |  |
| Barrallier, Jai (00033)  |   | Teakhee                                   |  |
| Bathurst, Mitchell (00114)<br>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)<br>Bochsa, Alannah (00007)                 |   | Event type: Annual Leave                  | Notes Documents  |
| Boston, Callum (00039)   |   | Assigned to:<br>Complete: No              |  |
| Boucaut, Joseph (00087)  |   | 13/04/2012                                | Compact view mode  Vinclude subordinate documents                          |
| Bramston, Austin (00151)   |   | 11:55:36 AM                               | ✓ Include subordinate documents<br>Link style File type Name Open Edit Del |
| Bromby, Evie (00335)<br>Brooks, Jessica (00052)                  |   | Last edit by: VETtrak                     | Doc Db Training A Aardvark- ···· 🔀   |
| Brooks, Jessica (00052)<br>Bryce, Noah (00203)                   |   |   | Doc Db Enrolment ENRO-Aar ··· ··· ··· ···                                  |
| Bugden, Emma (00027)   |   |   | Doc Db Student A CHCCN30   |
| Bukowski, Skye (00040)   | · · · · · · · · · · · · · · · · · · ·   | Start date: 13/06/2012<br>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<br>Set VETtrak preferences<br>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<br>Absolute Relative V<br>Base folder for relative paths<br>C:\Users\Public\Documents\Documents\Trail<br>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<br>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.<br>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<br>ENRO-Aardvark-AlanVTR-00215.pdf<br>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<br>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<br>Type Details<br>Enrolled unit CHCC | Select the link style, file type and complete file<br>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<br>C:\Users\Public\Documents\Documents\Trainee Docs\/<br>Name 5<br>CHCCN301A-VTR-00215-1<br>Description 6<br>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.

20 FileTrak

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<br>name/URL (include file p | type and complete file<br>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<br>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<br>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.