



## Trainer Portal Web Guide

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# 1 Trainer Portal Web Guide

The VETtrak Trainer Portal allows trainers to perform relevant VETtrak functions via a web browser. Depending on how your portal is set up in VETtrak, information entered in the portal will be:

- Saved directly into VETtrak, or
- Sent to an interim area for Quality Assurance by a VETtrak administrator, who can then approve or reject the entry of that information into VETtrak. The VETtrak administrator can also send feedback to the trainer for review.

## **What Trainers Can See**

The VETtrak app only allows you to see certain types of information. You also need to be linked to information for it to be visible to you in the app. The information visible in the portal is:

- Classes
- Clients
- Enrolments
- Events
- Employers
- Messages

## **What Trainers Can Do**

Only the functions most commonly used for trainers in the field are included in the portal, and different users can be granted access to different functions.

Depending on the level of access you have been granted, you may be able to:

- Record attendance
- Record results
- View, add and edit events
- View and edit clients
- View employer details
- Send and view text messages and emails sent to clients via VETtrak

## 1.1 Dashboard

When you log into the Trainer Portal, you will find yourself at the dashboard pictured below:

**OZSOFT SOLUTIONS PTY LTD** Type here to begin searching... Search Log off

DASHBOARD SCHEDULE WORKFLOW

**DASHBOARD**  
**JOE BLOGGS**

### CURRENT EVENTS AND CLASSES

**Schedule**

---

**EVENT**

Trainee Follow Up - Curry, Jason (00006)

**Details**

---

**CLASS**

Certificate IV in Design

**Go to class**

### WORKFLOW STATUS

**Workflow manager**

---

**PENDING QA** **QA REJECTIONS**

**49** **1**

### UPCOMING CLASSES

**Schedule**

---

**NEXT CLASS**

**24/06/2015 09:00AM**

COURSE	DATE/TIME	
Certificate IV in Design	24/06/2015 09:00AM - 04:00PM	<b>Go to class</b>
Certificate IV in Design	29/06/2015 09:00AM - 04:00PM	<b>Go to class</b>

### UPCOMING EVENTS

**Schedule**

---

**NEXT EVENT**

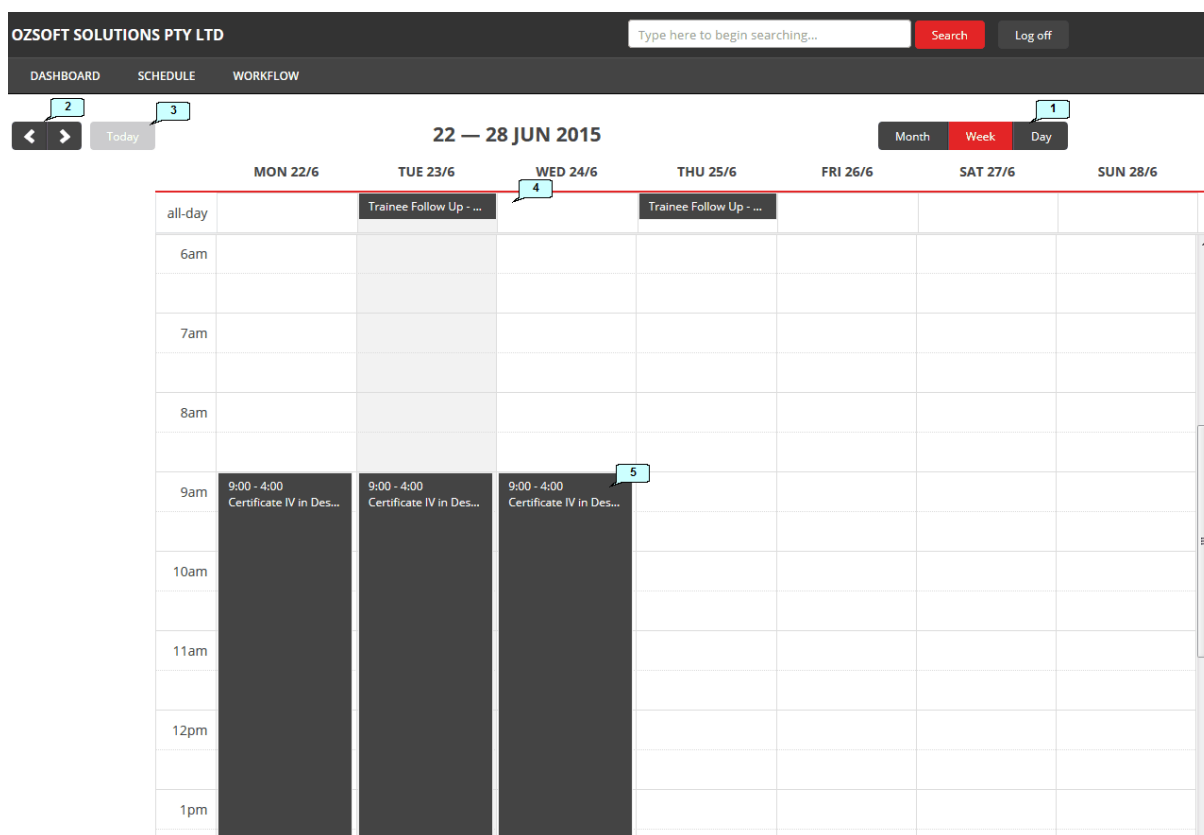
**25/06/2015**

EVENT	BELONGS TO	DATE/TIME	
Trainee Follow Up	Melton, Ashlynn (00003)	Thu 25/06/2015	<b>Details</b>

1. **Current Events and Classes** - This gives a handy quick view of classes and events that are happening now. This shows events and classes that span the current time, and any that are set as all day events for today. In this case you have to follow up one trainee, and take a class in Certificate IV in Design today. Click on the **Schedule** button to see a full schedule in calendar mode. Click the **Details** button to see full details of the event, or the **Go to class** button to go to the Class page.
2. **Workflow Status** - If your portal has been set up to require Quality Assurance before items are saved into VETtrak, this area shows the status of items that you have sent for Quality Assurance. In this case you have 49 items awaiting approval by the VETtrak administrator, and one item that has been rejected. Click the **Workflow manager** button to see full details.
3. **Upcoming Classes** - This shows a list of your upcoming classes. This will show today's class if its start time is later than now. If today's class has already started, it will start with the next class coming. Click on the **Schedule** button to see a full schedule in calendar mode. Click the **Go to class** button to go to the page for the individual Class.
4. **Upcoming Events** - This shows a list of your upcoming events. This will show today's event if its start time is later than now. If today's event has already started, it will start with the next event coming. Click on the **Schedule** button to see a full schedule in calendar mode. Click the **Details** button to see the details of each event.

## 1.2 Schedule

A calendar showing all of your classes and events can be accessed by clicking the **Schedule** item in the menu bar, or any of the **Schedule** buttons on the Dashboard.



1. The calendar opens in week view on the current week. Click these buttons to change to day or month view.
2. Click the arrows to go to the previous or next week, day or month.
3. Click **Today** to come back to the current day, week or month.
4. Items shown in the top section are scheduled as all-day events (there is no specific time recorded for them).
5. Classes and events with times recorded are shown in the appropriate part of the calendar.

## 1.3 Managing Classes

Working with a class allows you to perform actions on multiple students at once, such as recording attendance or results, sending messages, or flagging students for a follow-up appointment.

Access an individual class by clicking the **Go to class** button on the [Dashboard](#)<sup>[4]</sup> or [Schedule](#)<sup>[5]</sup>.

**VIEW CLASS**  
**CERTIFICATE IV IN DESIGN**  
 Wed 08/07/2015 9:00 AM - 4:00 PM Current: 6 - Certificate IV in Design (CUV40311)

VIEW DETAILS

**STUDENTS** <sup>2</sup> **UNITS** <sup>1</sup>

<sup>4</sup> Record attendance <sup>5</sup> Record results <sup>6</sup> Send email <sup>7</sup> Send SMS <sup>8</sup> Flag for follow up

	CODE	GIVEN NAME ^	SURNAME	ATTENDANCE	SIGNED
<input checked="" type="checkbox"/>	00003	Ashlynn	Melton		No <a href="#">Details</a>
<input checked="" type="checkbox"/>	00005	Chelsea	Patrick		No <a href="#">Details</a>
<input type="checkbox"/>	00002	Donald	Aguilar		No <a href="#">Details</a>
<input checked="" type="checkbox"/>	00006	Jason	Curry		No <a href="#">Details</a>
<input type="checkbox"/>	00012	Samantha	Matthews		No <a href="#">Details</a>
<input type="checkbox"/>	00010	Trevor	Chan		No <a href="#">Details</a>

1. The **Units** tab shows a list of all units associated with the class, for information purposes only.
2. The **Students** tab allows you to perform a number of actions on individual or multiple students.
3. Tick the student(s) you want to work with and click the buttons to:
4. Record [attendance](#)<sup>[7]</sup>.
5. Record [results](#)<sup>[11]</sup>.
6. Send [emails](#)<sup>[24]</sup> to selected students.
7. Send [SMS messages](#)<sup>[25]</sup> to selected student.
8. Flag these students for [follow-up](#)<sup>[19]</sup>



**RECORD ATTENDANCE**  
**RECORD ATTENDANCE FOR CLASS**

**STUDENT(S)**  
Ashlynn Melton  
Melton, Ashlynn (00003)

**ATTENDANCE** 1  
Present

**START DATE/TIME** 2  
24/06/2015 11:00

**END DATE/TIME**  
24/06/2015 16:00

**COMMENTS FOR QA**  
You can optionally include some extra comments in here to help with quality assurance.  
3  
Arrived two hours late due to doctor's appointment.

4  
Submit attendance Close

1. Select the type of attendance you want to record.
2. Set the start and finish dates and times.
3. Optionally, you can include any relevant comments here.
4. Click **Submit attendance**.



### 1.3.1.1 Recording Signatures

Once you have recorded attendance for a student, a **Sign** button will become available to allow you to record their signature to verify their attendance.

VIEW DETAILS

STUDENTS		UNITS		
		Record attendance Record results Flag for follow up		
CODE	GIVEN NAME ▲	SURNAME	ATTENDANCE	SIGNED
00003	Ashlynn	Melton	Present	No
				Details Sign

Get the student to sign the screen using a finger or stylus on a touch-screen device, or the mouse on a computer, and click **Save signature**.

**RECORD SIGNATURE**  
**RECORD SIGNATURES FOR CLASS**

MELTON, ASHLYNN (00003)  
Present 24/06/2015 11:00AM - 04:00PM  
Please fill as much of the box below as possible.

Reset

A. Melton

Save signature Close

### 1.3.1.2 Endorsing Attendance

When you have recorded signatures for all students present in a class, an **Endorse Attendance** link become available to allow you to sign to verify the attendance records for the whole class.

#### VIEW CLASS

#### CERTIFICATE IV IN DESIGN

Wed 24/06/2015 9:00 AM - 4:00 PM Current: 6 - Certificate IV in Design (CUV40311)

[VIEW DETAILS](#)
[ENDORSE ATTENDANCE](#)

STUDENTS

UNITS

						<a href="#">Record attendance</a> <a href="#">Record results</a> <a href="#">Send email</a> <a href="#">Send SMS</a> <a href="#">Flag for follow up</a>	
	CODE	GIVEN NAME ▲	SURNAME	ATTENDANCE	SIGNED		
QA	00003	Ashlynn	Melton	Present	Yes	<a href="#">Details</a>	<a href="#">Sign</a>
QA	00005	Chelsea	Patrick	Present	Yes	<a href="#">Details</a>	<a href="#">Sign</a>
QA	00002	Donald	Aguilar	Present	Yes	<a href="#">Details</a>	<a href="#">Sign</a>
QA	00006	Jason	Curry	Present	Yes	<a href="#">Details</a>	<a href="#">Sign</a>
QA	00012	Samantha	Matthews	Present	Yes	<a href="#">Details</a>	<a href="#">Sign</a>
QA	00010	Trevor	Chan	Present	Yes	<a href="#">Details</a>	<a href="#">Sign</a>

Sign in the signature panel, add any comments if necessary, and click **Save signature**. (You may have to scroll down to see the **Save signature** button.)

**RECORD ENDORSEMENT**  
**ENDORSE CLASS ATTENDANCE**

**STUDENT(S)**

**Donald Aguilar**  
Present 24/06/2015 09:00AM - 04:00PM

**Trevor Chan**  
Present 24/06/2015 09:00AM - 04:00PM

**Jason Curry**  
Present 24/06/2015 09:00AM - 04:00PM


**Samantha Matthews**  
Present 24/06/2015 09:00AM - 04:00PM

**Ashlynn Melton**  
Present 24/06/2015 09:00AM - 04:00PM

**Chelsea Patrick**  
Present 24/06/2015 09:00AM - 04:00PM

**RECORDING ENDORSEMENT AS**  
Bloggs, Joe (00007)  
Please fill as much of the box below as possible.  

Reset



**COMMENTS FOR QA**  
You can optionally include some extra comments in here to help with quality assurance.



**RECORD RESULTS**  
**RECORD RESULTS FOR CLASS**

**STUDENT(S)**

**Ashlynn Melton**  
Melton, Ashlynn (00003)  
The selected unit is already complete, you cannot change the result. This student will be skipped.

**Chelsea Patrick**  
Patrick, Chelsea (00005)  
The selected unit is already complete, you cannot change the result. This student will be skipped.

**Donald Aguilar**  
Aguilar, Donald (00002)

**Jason Curry**  
Curry, Jason (00006)

**Samantha Matthews**  
Matthews, Samantha (00012)

**Trevor Chan**  
Chan, Trevor (00010)

**UNIT**  
BSBCRT301A - Develop and extend critical and creative

**RESULT**  
Competent

**START**  
14/06/2015

**END**  
23/06/2015

Save result

Close

1. Select the unit you want to record results for.
2. Select the result you want to record.
3. Select the start and finish dates for the unit.
4. If any students already have a completed-type result for the unit, they will be skipped when recording this result.
5. Click **Save result**.

## 1.4 Managing Students

Rather than working on a whole class at once, you can find an individual student and see all their information together, and record their attendance, results and events, and send them messages, all from the one location.

### 1.4.1 Searching for Students

To search for a student you can either:

- Type in the search field at the top of the screen and click **Search**. This performs a quick search of all students and employers.
- Click **Search** without entering any text. This takes you to the special search screen, where you can choose to search only Students.

OZSOFT SOLUTIONS PTY LTD

Type here to begin searching... Search Log off

DASHBOARD SCHEDULE WORKFLOW

SEARCH

Students

Students

Employers

Both

Search

## 1.4.2 Student Screen Overview

To go to a student record, either [search](#) <sup>(13)</sup> for the student, or click on **Go to client** after clicking on a student in a class. The following screen will open:

**OZSOFT SOLUTIONS PTY LTD** Type here to begin searching... Search Log off

DASHBOARD SCHEDULE WORKFLOW

**VIEW STUDENT**  
**ASHLYNN MELTON**  
Ms. Ashlynn Melton (00003)

1 VIEW DETAILS 2 EDIT DETAILS 3 SEND EMAIL 4 SEND SMS 5 RECORD EVENT 6 FLAG FOR FOLLOW UP

7 CLASSES 8 UNITS 9 EVENTS 10 MESSAGES

Record attendance

COURSE CODE	COURSE NAME	% ATTENDED	START DATE ▲	END DATE
▶ CUV40311	Certificate IV in Design	24.7%	01/04/2015	30/04/2016

1. Click here to view the student's personal information without making any changes to it.
2. Click here if you need to make changes to the student's information.
3. You can send the student an email,
4. or an SMS message.
5. **Record event** allows you to record details about an event associated with this student.
6. **Flag for follow up** is a quick way to record a date that you next want to follow up with this student. This creates a simple all-day follow-up event. If you want to record times or other details, use the **Record event** option instead.
7. The **Classes** tab shows all the student's classes, past, present and future.
8. The **Units** tab shows all the units the student is currently enrolled in.
9. The **Events** tab lists all events associated with the student.
10. The **Messages** tab shows all email and SMS messages sent to the student via VETtrak or the portal.

1.4.3 Student Details

Click **View details** to see the student's personal details:

VIEW STUDENT DETAILS

ASHLYNN MELTON

Go to student

NAME

Ms. Ashlynn Melton

EMPLOYER

Total Sources

Go to employer

HOME PHONE

(02) 4699 4095

MOBILE PHONE

0411111111

USUAL ADDRESS

28 LaTrobe Street  
Melbourne Vic 3000

AGE

41 (22/11/1973)

POSITION

Receptionist

EMAIL ADDRESS

ashlynn.melton@example.com.au

POSTAL ADDRESS

28 LaTrobe Street  
Melbourne Vic 3000

USI

AAAAAAAAAJ  
(Unverified)

Close

© 2015 VETtrak

If you need to edit their details, click **Edit details** and edit as required. Note that on smaller screens, you may need to scroll down to find the **Submit** button.

**EDIT STUDENT DETAILS**  
**MELTON, ASHLYNN (00003)**

**HOME PHONE**  
(02) 4699 4095

**MOBILE PHONE**  
0411111111

**USI**  
AAAAAAAAAJ

**USI STATUS**  
Unverified

**EMAIL ADDRESS**  
ashlynn.melton@example.com.au

**POSTAL ADDRESS**  
☐ STREET ADDRESS ☒ PO BOX

**USUAL ADDRESS**  
**UNIT**  
  
**BUILDING**

**PO BOX**  
PO Box 1111

**NUMBER**  
28  
**STREET**  
LaTrobe Street

**CITY/SUBURB**  
Melbourne  
**STATE**  
Vic  
**POSTCODE**  
3000

**CITY/SUBURB**  
Melbourne  
**STATE**  
Vic  
**POSTCODE**  
3000

**COMMENTS FOR QA**  
You can optionally include some extra comments in here to help with quality assurance.



## 1.4.4 Recording Student Events

### VIEW STUDENT

ASHLYNN MELTON

Ms. Ashlynn Melton (00003)

3

VIEW DETAILS EDIT DETAILS SEND EMAIL SEND SMS RECORD EVENT FLAG FOR FOLLOW UP

CLASSES UNITS **EVENTS** 1 MESSAGES

EVENT	DATE/TIME ▲	2
Trainee Follow Up	Wed 03/06/2015	Details Edit
Trainee Follow Up	Wed 03/06/2015	Details Edit
USI Followup	Fri 05/06/2015	Details Edit
Trainee Follow Up	Fri 05/06/2015	Details Edit
Trainee Follow Up	Sun 21/06/2015	Details Edit
Trainee Follow Up	Thu 25/06/2015	Details Edit

1. Click on the **Events** tab to see a list of all the student's events with which you are associated.
2. Click these buttons to view the details of, or edit, an existing event.
3. Click **Record event** to create a new event for the student.

**CREATE EVENT**  
**ASHLYNN MELTON**

---

**STUDENT**  
Melton, Ashlynn (00003) [Go to student](#)

**EVENT TYPE** 1  
Final Assessment

**STAFF MEMBER** 2  
Bloggs, Joe (00007)

**EVENT IS A MILESTONE?** 3 ☒

**EVENT HAS TIMES?** 4 ☒

**EVENT IS COMPLETE?** 5 ☐

**START** 6  
30/06/2015 09:00

**END**  
11:00

**NOTES** 7  
Workplace assessment

8 [Save changes](#) [Close](#)

1. Select the type of event you wish to create.
2. Select a staff member. Note that you **must select yourself** here if you want this event to appear on your own schedule in the portal. **If you do not select yourself, you will not be able to see this event in the portal.**
3. A milestone means that the event happens on one day only. If the event is to span multiple days, untick this box and a finish date field will become available.
4. Tick this box if you want to enter specific times for the event. If this is left unticked, the event will be an all-day event.
5. Tick this box if the event has been completed.
6. Enter the date(s) and times for the event.
7. (Optional) Enter any relevant notes here.
8. Click **Save changes**.

### 1.4.5 Flag for Follow-up

A Follow-up is a type of student event. The **Flag for follow up** feature allows you to quickly and easily set a date for your next follow-up with a student, rather than going through the whole event creation process. A follow-up event is created as a single, all-day event.

To flag a student for follow-up, click **Flag for follow up** on the student overview screen.

**CREATE EVENT**  
**FOLLOW UP WITH ASHLYNN MELTON**

**STAFF MEMBER** 1  
Bloggs, Joe (00007)

**FOLLOW UP DATE** 2  
2015-07-23

**NOTES** 3

4  
**Create event** **Close**

1. Select the staff member who will perform the follow-up visit. Note that you **must select yourself** here if you want this event to appear on your own schedule in the portal. **If you do not select yourself, you will not be able to see this event in the portal.**
2. Set the date for the follow-up.
3. (Optional) Enter any relevant notes.
4. Click **Create event**.

The follow-up will now appear as an all-day event in the calendar of the selected staff member.

### 1.4.6 Classes Tab

The **Classes** tab allows you to see information about, and perform actions on, all of a student's classes in one single location.

**VIEW STUDENT**  
**ASHLYNN MELTON**  
 Ms. Ashlynn Melton (00003)

VIEW DETAILS EDIT DETAILS SEND EMAIL SEND SMS RECORD EVENT FLAG FOR FOLLOW UP

**CLASSES** UNITS EVENTS MESSAGES

**Record attendance** 7

COURSE CODE	COURSE NAME	% ATTENDED	START DATE	END DATE
CUV40311	Certificate IV in Design	21.5%	01/04/2015	30/04/2016

DATE/TIME	ATTENDANCE	SIGNED
<input type="checkbox"/> Wed 01/04/2015 9:00 AM - 4:00 PM <input type="checkbox"/> Mon 06/04/2015 9:00 AM - 4:00 PM <input checked="" type="checkbox"/> Tue 07/04/2015 9:00 AM - 4:00 PM <input type="checkbox"/> Wed 08/04/2015 9:00 AM - 4:00 PM <input type="checkbox"/> Wed 08/04/2015 10:30 AM - 11:00 AM	Present Sick Arrived Late	No No No No No

3 QA 6

1 2 4 5

Details Sign

1. Click on a course to expand it and see all its classes.
2. This shows what percentage of classes the student has attended.
3. Any items that are awaiting approval by the VETtrak administrator are flagged here.
4. Click to see details of this class.
5. If you have recorded attendance for this class, but not recorded the student's signature, the **Sign** button will be enabled. Click to record the student's signature.
6. If you want to record this client's class attendance here, select the appropriate class, and
7. Click **Record attendance**. You can then proceed as described under [Recording Attendance](#).

## 1.4.7 Units Tab

The **Units** tab allows you to see information about, and record results for, all of a student's units in one single location.

**VIEW STUDENT**  
**ASHLYNN MELTON**  
 Ms. Ashlynn Melton (00003)

VIEW DETAILS EDIT DETAILS SEND EMAIL SEND SMS RECORD EVENT FLAG FOR FOLLOW UP

CLASSES **UNITS** EVENTS MESSAGES

4 Record results

COURSE CODE ▲	COURSE NAME	START DATE	END DATE
▼ CUV40311	Certificate IV in Design	01/04/2015	30/04/2016

UNIT CODE ▲	UNIT NAME	RESULT	START DATE	END DATE
<input type="checkbox"/> BSBCRT301A	Develop and extend critical and creative thinking skills	Competent	15/04/2015	16/04/2015
<input checked="" type="checkbox"/> BSBCRT403A	Explore the history and social impact of creativity			23/06/2015
<input type="checkbox"/> BSBDES303A	Explore and apply the creative design process to 3D forms			23/06/2015
<input type="checkbox"/> BSBDES304A	Source and apply design industry knowledge	Competent	05/05/2015	31/05/2015
<input type="checkbox"/> BSBDES305A	Source and apply information on the history and theory of design			
<input type="checkbox"/> BSBDES401A	Generate design solutions			

3

2 QA

1. Click on a course to expand it and see all its units.
2. Any items that are awaiting approval by the VETtrak administrator are flagged here.
3. If you want to record this client's unit results here, select the appropriate unit, and
4. Click **Record results**. You can then proceed as described under [Recording Results](#).

### 1.4.8 Events Tab

See [Recording Student Events](#) <sup>(17)</sup> section for more information about events.

### 1.4.9 Messages Tab

The **Messages** tab shows a record of all email and text messages that have been sent to the student via VETtrak. Click the **Details** button to view the full message.

**VIEW STUDENT****ASHLYNN MELTON**

Ms. Ashlynn Melton (00003)

<a href="#">VIEW DETAILS</a>	<a href="#">EDIT DETAILS</a>	<a href="#">SEND EMAIL</a>	<a href="#">SEND SMS</a>	<a href="#">RECORD EVENT</a>	<a href="#">FLAG FOR FOLLOW UP</a>
------------------------------	------------------------------	----------------------------	--------------------------	------------------------------	------------------------------------

[CLASSES](#)   [UNITS](#)   [EVENTS](#)   **[MESSAGES](#)**

DATE SENT ▼	FROM	SUMMARY	
24/06/2015	Trainer	Reminder: Class tomorrow at 9am	<a href="#">Details</a>
24/06/2015	joe.bloggs@ozsoft.com.au	Final assignment	<a href="#">Details</a>

## 1.5 Sending Messages to Students

If message sending has been enabled for your Trainer Portal by the VETtrak administrator, you will be able to send emails and / or text messages to students who have the appropriate contact details recorded.

You can send messages to:

- Some or all of the students in a class by ticking the appropriate students on the class screen and clicking **Send email** or **Send SMS**.

### VIEW CLASS

#### CERTIFICATE IV IN DESIGN

Tue 30/06/2015 9:00 AM - 4:00 PM Current: 6 - Certificate IV in Design (CUV40311)

VIEW DETAILS

STUDENTS

UNITS

<a href="#">Record attendance</a> <a href="#">Record results</a> <a href="#">Send email</a> <a href="#">Send SMS</a> <a href="#">Flag for follow up</a>					
	CODE	GIVEN NAME ▲	SURNAME	ATTENDANCE	SIGNED
<input checked="" type="checkbox"/>	00003	Ashlynn	Melton		No <a href="#">Details</a>
<input checked="" type="checkbox"/>	00005	Chelsea	Patrick		No <a href="#">Details</a>
<input checked="" type="checkbox"/>	00002	Donald	Aguilar		No <a href="#">Details</a>
<input checked="" type="checkbox"/>	00006	Jason	Curry		No <a href="#">Details</a>
<input checked="" type="checkbox"/>	00012	Samantha	Matthews		No <a href="#">Details</a>
<input checked="" type="checkbox"/>	00010	Trevor	Chan		No <a href="#">Details</a>

- An individual student by clicking **Send email** or **Send SMS** on the student screen:

### VIEW STUDENT

#### ASHLYNN MELTON

Ms. Ashlynn Melton (00003)

[VIEW DETAILS](#)
[EDIT DETAILS](#)
[SEND EMAIL](#)
[SEND SMS](#)
[RECORD EVENT](#)
[FLAG FOR FOLLOW UP](#)

CLASSES

UNITS

EVENTS

MESSAGES

Record attendance

COURSE CODE	COURSE NAME	% ATTENDED	START DATE ▲	END DATE
▶ CUV40311	Certificate IV in Design	<div><div></div></div> 24.7%	01/04/2015	30/04/2016

### 1.5.1 Sending Emails

**SEND EMAIL**  
**SEND CLASS EMAIL**

**FROM** 1  
joe.bloggs@ozsoft.com.au

**TO** 2  
Ashlynn Melton  
ashlynn.melton@example.com.au  
Chelsea Patrick  
patrick.chelsea@example.com  
Donald Aguilar  
donaldaguilar@pookmail.com  
Jason Curry  
No email address

**SUBJECT** 3  
Assignment reminder

**MESSAGE** 4  
Hi class,  
This is just a reminder that your assignment is due before the class next Monday. Please contact me if you have any questions about the assignment.  
Regards,  
Joe Bloggs

**Send email** 5 **Close**

1. The From address will default to the default email that is recorded in VETtrak email preferences for your organisation, but you can overwrite it with your own email address.
2. If any of the students do not have an email address recorded in VETtrak, they will be greyed out here.
3. Enter the email subject.
4. Type your message.
5. Click **Send email**.

The email will now be available to view under each student's [Messages](#) 221 tab.



## 1.5.2 Sending SMS Messages

**SEND SMS**  
**SEND CLASS SMS**

**FROM** 1  
JoeBloggs

**TO** 2

- Ashlynn Melton  
0411111111
- Chelsea Patrick  
9407 796 302
- Donald Aguilar  
*No mobile number supplied*
- Jason Curry  
0412931111

**MESSAGE** 3  
Hi class, don't forget to bring your assignments to submit at tomorrow's class!

Credits remaining: 16

4  
**Send SMS** **Close**

1. You can enter either a return phone number or your name here. If you want students to be able to reply, you must enter a phone number here. If you enter your name, the message will appear to students as being from you, with no phone number provided. **NOTE:** Do not enter spaces or punctuation in this field.
2. If any of the students do not have a mobile phone number recorded in VETtrak, they will be greyed out here.
3. Type your message.
4. Click **Send SMS**.

The message will now be available to view under each student's [Messages](#) <sup>22</sup> tab.

## 1.6 Viewing Employer Information

You can view a limited amount of information regarding your students' employers in the Trainer Portal.

### 1.6.1 Searching for Employers

To search for an employer you can either:

- Type in the search field at the top of the screen and click **Search**. This performs a quick search of all students and employers.
- Click **Search** without entering any text. This takes you to the special search screen, where you can choose to search only Employers.

OZSOFT SOLUTIONS PTY LTD

Type here to begin searching... Search Log off

DASHBOARD SCHEDULE WORKFLOW

SEARCH

Students

Students

Employers

Both

Search

## 1.6.2 Employer Screen



### VIEW EMPLOYER

### TOTAL SOURCES

Total Sources (1)

VIEW DETAILS

#### EMPLOYER CONTACTS

PRIMARY	GIVEN NAME	SURNAME	WORK PHONE	MOBILE PHONE	EMAIL ADDRESS
	Joan	Baker	04 9999 4444	0285948375	joan@gmail.com
	John	Smith	03 4444 0166	0455 777 888	jsmith@totalsources.com.au

1. Contact details are listed for all the employer's contact people who are listed in VETtrak.
2. The Primary contact is indicated with a green dot.
3. Click **View details** to see the employer's full contact information.

### VIEW EMPLOYER DETAILS

### TOTAL SOURCES

Go to employer

---

**NAME**  
Total Sources

**LEGAL NAME**  
Total Sources Pty Ltd

**OFFICE PHONE**  
03 9999 2222

**MOBILE PHONE**  
0404 040 404

**EMAIL ADDRESS**  
admin@totalsources.com.au

**BUSINESS ADDRESS**  
99 Main Street  
Acheron Vic 3714

**POSTAL ADDRESS**  
99 Main Street  
Acheron Vic 3714

Close

## 1.7 Workflow Manager

If your portal has been set up to require Quality Assurance by a VETtrak administrator, some or all items that you submit will be sent to an interim holding area before being saved in VETtrak. Which items require Quality Assurance depends on the VETtrak settings. The Workflow Manager is where you can see and manage items that have been sent for Quality Assurance.

To access the Workflow Manager, click **Workflow** on the top menu bar, or **Workflow manager** in the Workflow Status panel.

The **QA Rejections** tab shows any items that the VETtrak administrator has rejected and sent back to you for further action:

1. Tick the item that you want to investigate or modify.
2. Click **Edit item** to view and make changes to the submitted information.
3. If you want to send back a comment with further information or explanation, click **Submit feedback**.
4. If the item was incorrectly submitted, or is no longer applicable, you can delete it by clicking the **Remove** button.

The **Pending QA** tab shows all items that are awaiting processing by the VETtrak administrator.

**WORKFLOW MANAGER**  
**JOE BLOGGS**

QA REJECTIONS

PENDING QA

QA HISTORY (LAST 30 DAYS)

2

Edit item

3

Leave comment

4

Remove

ENTITY NAME	DATE	LAST ACTION ▾	OPERATION	STATUS	COMMENTS
<input type="checkbox"/> Unit/Element result	22/04/2015 1:18 pm	23/06/2015 1:10 pm	Create	Pending	
<input checked="" type="checkbox"/> Attendance	20/04/2015 6:22 pm	23/06/2015 10:23 am	Create	Pending	
<input type="checkbox"/> Unit/Element result	05/06/2015 2:04 pm	05/06/2015 2:04 pm	Create	Pending	Insert record
<input type="checkbox"/> Unit/Element result	05/06/2015 2:04 pm	05/06/2015 2:04 pm	Create	Pending	Insert record
<input type="checkbox"/> Unit/Element result	05/06/2015 2:04 pm	05/06/2015 2:04 pm	Create	Pending	Insert record
<input type="checkbox"/> Unit/Element result	05/06/2015 2:04 pm	05/06/2015 2:04 pm	Create	Pending	Insert record
<input type="checkbox"/> Unit/Element result	05/06/2015 2:04 pm	05/06/2015 2:04 pm	Create	Pending	Insert record
<input type="checkbox"/> Unit/Element result	28/05/2015 2:28 pm	05/06/2015 12:39 pm	Create	Pending	
<input type="checkbox"/> Attendance	06/05/2015 4:18 pm	28/05/2015 2:40 pm	Create	Pending	
<input type="checkbox"/> Attendance	20/04/2015 6:22 pm	27/05/2015 11:38 am	Create	Pending	
<input type="checkbox"/> Unit/Element result	22/04/2015 8:43 am	19/05/2015 2:06 pm	Create	Pending	contacted on 18 May 2015 still no cover sheet submitted

1. Tick the item that you want to investigate or modify.
2. Click **Edit item** to view or make changes to the details of a submitted information.
3. If you want to add a comment with further information or explanation, click **Leave comment**.
4. If the item was incorrectly submitted, or is no longer applicable, you can delete it by clicking the **Remove** button.

The **QA History** tab shows all submitted items (both pending and processed) for the last 30 days.

**WORKFLOW MANAGER**  
**JOE BLOGGS**

QA REJECTIONS   PENDING QA <b>QA HISTORY (LAST 30 DAYS)</b>						
ENTITY NAME	DATE	LAST ACTION ▾	OPERATION	STATUS	CURRENT STAGE	
Unit/Element result	05/06/2015 2:04 pm	18/06/2015 11:27 am	Create	Accepted	Accepted	
Unit/Element result	10/06/2015 10:02 am	18/06/2015 11:26 am	Create	Accepted	Accepted	
Unit/Element result	28/05/2015 2:31 pm	15/06/2015 4:57 pm	Create	Rejected	Rejected	
Unit/Element result	05/06/2015 2:04 pm	05/06/2015 2:04 pm	Create	Pending	Submitted	
Unit/Element result	05/06/2015 2:04 pm	05/06/2015 2:04 pm	Create	Pending	Submitted	
Unit/Element result	05/06/2015 2:04 pm	05/06/2015 2:04 pm	Create	Pending	Submitted	
Unit/Element result	05/06/2015 2:04 pm	05/06/2015 2:04 pm	Create	Pending	Submitted	
Unit/Element result	05/06/2015 2:04 pm	05/06/2015 2:04 pm	Create	Pending	Submitted	
Unit/Element result	28/05/2015 2:28 pm	05/06/2015 12:39 pm	Create	Pending	Edited	