Manual

Contents

Introduction

This manual focuses on the administration of VETenrol and the tasks associated with setting up courses for web enrolment and handling enrolments.

You will notice that through-out this guide some text appears in **bold**. The **bold** style indicates the text is a reference to an element appearing on-screen. This will help readily identify steps on-screen when following through a set of instructions. In addition to the bold text, there are numerous screenshots to help keep instructions as simple and easy to follow as possible.

The following topics are addressed in this section:

> (*i*) Screenshots featuring the client registration system through-out this manual are provided as a representation only, actual screens will vary depending upon the branding and style approved by your organisation.

Product Overview

VETenrol consists of two major components:

- Client registration system; and
- Web-based administration.

The client registration system deals with the registration process, presenting clients with a step-by-step interface to record enrolment information. The web-based administration tracks the registration details and provides the interface for those details to be received by VETtrak.

There are two purchase plans for VETenrol. The standard is where VETenrol is set up and hosted by VETtrak Pty Ltd with on-going support and Self-Hosted where the product is provided 'as is' for the customer to install and host themselves.

> *(i)* In very rare circumstances, some clients may self-host VETenrol. Such clients will need to substitute https://enrol.vetenrol.com.au/ with their own URL to their self-hosted VETenrol when referring to this manual.

System Requirements

The general requirements for VETenrol are as follows:

- Internet Access

VETtrak Server

Your VETtrak server must meet the following requirements:

- VETtrak – version 20.4.x
- VETtrak API – version 1.15+

> *(note icon)* **NOTE:** If your VETtrak is hosted by VETtrak Pty Ltd we can verify these requirements have been met on your behalf.

VETenrol Administration

VETenrol Client Administration is available from any computer with Internet access meeting the following requirements:

- Screen resolution of 1280 x 720 (1920 x 1080 recommended)
- A modern web browser. eg. Internet Explorer 10+, Firefox 51+, or Google Chrome 56+.

VETenrol Server (Self-Hosted requirements)

The server on which you install VETenrol must meet the following requirements:

- Windows Server 2003+
- Asp.net enabled webserver with .NetFramework 3.5
- Static IP Address
- Internet Information Services (IIS)
- SSL Certificate
- MySQL

Getting Started

This section covers the steps required to start receiving registrations online.

There are tasks that must be completed for both VETenrol and VETtrak before your organisation can begin receiving online registrations.

The following topics are addressed in this section:

VETenrol Client Administration

This topic provides a brief introduction to the Client Administration interface and covers only the essential settings required to start using VETenrol.

The initial setup for Client Administration will require you to have the following important information at hand:

- Details for accessing your VETtrak API.
- Details for accessing your automated payment facility (Self-hosted)
- Terms & Conditions for your customers.

Some information may be pre-filled and should be checked for completeness and accuracy. All required information must be entered before you can save.

> **See also**: Client Administration Interface on page 59 for a comprehensive review of all settings and features available in the interface.

First Login

Access your VETenrol Client Administration from your Internet browser by adding /ClientAdmin to your VETenrol URL.

For example: https://enrol.vetenrol.com.au/ClientAdmin is the Standard URL.

We recommend adding the address to your favourites for easy access in the future.

1. Enter your **Client ID**.
2. Enter your **Password**.

3. Click the '**Log in**' button.

These details will be available in the activation email sent to you together with this manual.

After a moment you will be taken to the main screen.

Navigation

The navigation menu appears at the top of the screen, with items aligned horizontally. Some menu items open a sub menu containing links, which is indicated with a ▸ icon.
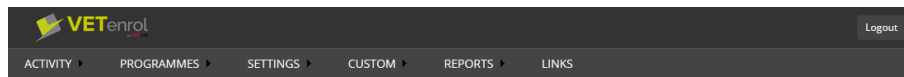
The menu consists of the following items:

- **Activity** — A sub menu providing access to records of user activity, categorised by type.
  - *Registrations* — A quick view of pending registrations. This is also the screen shown immediately after a successful login.
  - *Enquiries* — A quick view of enquires made for occurrences via VETenrol.
  - *Eligibilities* — A list of completed eligibility forms.
- **Programmes** —A sub menu of links relating to programmes.
- **Settings** — A sub menu of links for modifying various settings.
- **Custom** — This sub menu provides links to the custom features of VETenrol.
  - *Custom Agreements* — Manage the Agreements step in the registration process and set the declarations customers must agree to in order to proceed.
  - *Custom Forms* — Manage the Custom step in the registration process.
  - *Eligibility Builder* — Create a link to an eligibility form.
  - *Registration Builder* — Create a link to the registration form.
  - *LLN Quizzes* — Manage Language, Literacy and Numeracy quizzes and apply them to programmes.
- **Reports** — Access a small selection of reports for VETenrol.
- **Links** — Access a selection of common VETenrol links.
- **Logout** — A button to exit the Client Administration interface.

Position your mouse pointer over a menu item to cause it to highlight. In the case of items with the ▸ icon the sub menu will display momentarily, then position the mouse over the desired item. Press the left mouse button to choose the highlighted item and the corresponding screen will be displayed.

> ⓘ There is also a link called User Manual in the footer that will navigate to this manual.

On-screen Help

The Client Administration interface offers basic help, indicated by the ⊘ icon near an item. Clicking the item will open a pop-up window containing the information available for the item.
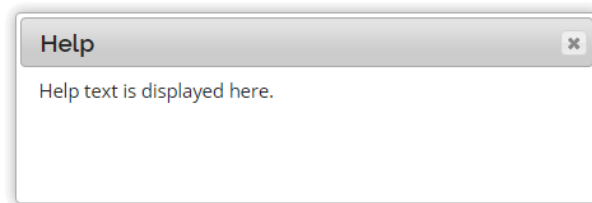
The help pop-up is closed by clicking the ✖ icon.

Initial Setup

VETenrol's Settings must be completed to ensure the correct working of the system with VETtrak. Follow these steps to complete the requirements for Settings:

1. Highlight '**Settings**' on the Navigation menu to display the sub-menu.
2. Click the '**General Settings**' menu item.

- Complete the **Client** section.
    - Your Client ID is for reference only and cannot be changed.
    - Most of these details will be displayed to customers during registration.
    - Some information may already be pre-filled.
- Set the '**Registrations View-Only Password**'.
- '**Enrolment API Details**' should be pre-filled.
- Click '**Save**'.

Go to **Settings** > **Payment Settings**:

- Choose your **Payment Preferences**.
    - These are global preferences.
- Choose the applicable settings for **Individual Registration Payment Preferences**.
- Choose the applicable settings for **Group Registration Payment Preferences**.
- Click **Save**.

> **NOTE**: If **Show Costs** (Site Settings) is enabled, and you've added pricing to your occurrences in VETtrak, at least one Payment Preference must be enabled for customers to complete their registration.

Visit **Settings** > **Agreements**:

- Review the default **Terms & Conditions**.
    - The Terms & Conditions will be displayed to clients, and need to be accepted to continue to the payment step of the registration process. If the field is left blank the system default will be used.
    - Use the **Default** button to insert the system default, and click the Edit icon to review the existing text.
        - You can make changes, or clear the text and enter your own into the editor.
        - If you are want to use the default, leave the Terms & Conditions field blank. Clear any inserted text and *do not* save.
- Click **Save**.

Changing your Password

The password to access VETenrol Client Administration should be changed regularly. To do this:

1. Highlight '**Settings**' on the Navigation menu to display the sub-menu.
2. Click the '**Change Password**' menu item.

The Change Password screen will be displayed:

3. Enter your current password in the **Old Password** field.

4. Type a **New Password**.

5. Re-enter the new password in the **Confirm Password** field.

6. Click the '**Save**' button.

Your password has been changed and should now be used for future logons.

Creating a course in VETtrak

To set up a course you will need to create a Programme and then an Occurrence for that programme. In addition, this topic identifies various elements in VETtrak that affect the functionality of VETenrol.

The appendix topic Price Items on page 249 is recommended for review prior to undertaking this topic to ensure VETenrol will display the correct costs for occurrences.

> **NOTE**: For in-depth details on all aspects of VETtrak, including creating programmes and occurrences, please refer to your VETtrak Manual.

Create Programme

Start your VETtrak program, eg. VETtrak Advantage Lite. In most cases there will be a shortcut on your desktop.
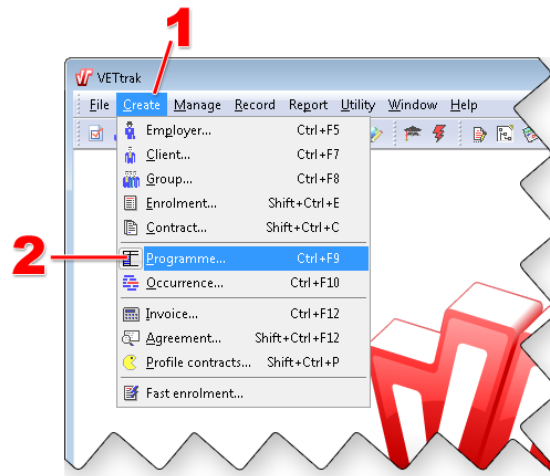
1. Choose '**Create**' from the menu bar.
2. Select '**Programme...**' to open the **Programme Wizard**.
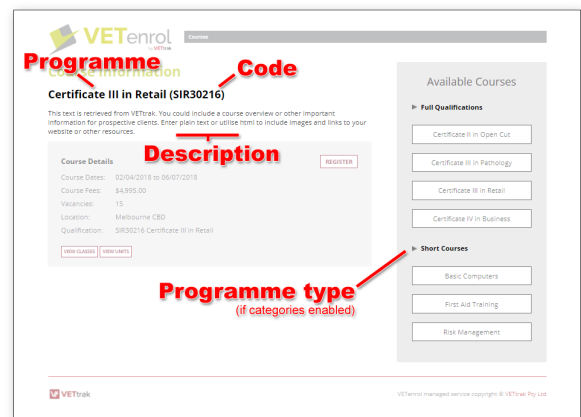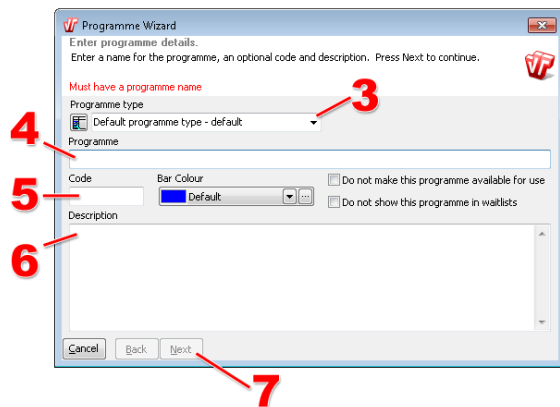
Customer View

3. Select a '**Programme type**' from the drop-down menu.
4. Enter the name of the Course in the '**Programme**' field.
   For accredited training it is a good idea to use the official course name.
5. Enter the course '**Code**'.
6. Write the course '**Description**'.
7. Click the '**Next**' button.
8. Click the '**Finish**' button.
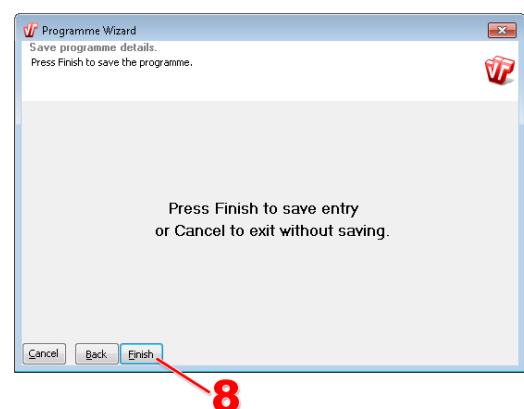
> ✐ **NOTE**: The 'Programme type' selected in step three is utilised to categorise programmes on the Available Programmes list when the Client Administration setting, as described in the topic Categorise Programmes on page 118 , is enabled. Refer to your VETtrak manual for more information on programme types.

Create Occurrence

Now it is time to create an occurrence for the new programme.
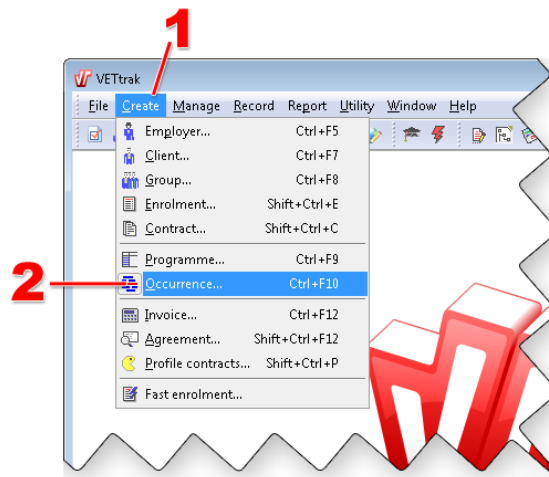
1. Select '**Create**' from the menu bar.
2. Choose '**Occurrence...**' to open the **Add Occurrence Wizard**.

Customer View

3. Choose the '**Start**' and '**Finish**' dates for the course.
4. Select the '**Location**' where the course is being held.
5. Select a '**Division**' from the drop-down menu provided.

6. Complete other fields, if applicable, such as '**Training package qualifications**'.
7. Click the '**Next**' button.

> **NOTE**: The 'Short Code' field depicted in the VETtrak screenshot above is used by VETenrol when the setting Show Occurrence Code on page 128 is enabled.

> **NOTE**: For NVR registered training organisations the maximum upfront payment may be limited to $1,500. When setting prices, remember the price displayed will be the amount charged or requested for payment (depending on settings). If the course fee is over $1,500 we suggest that you set up a price type with a name such as Enrolment Fee or Up Front Payment. You will need to display the full price of the course in the Programme Description. To ensure compliance with SNR 22 we recommend including a link to your organisation's Refund Policy. See HTML Code on page 253 regarding links.

Customer View

8. Complete as required.
9. Click the '**Next**' button.
10. Complete the state-based requirements. This step will vary depending on the **State rules in effect**.
11. Click the '**Next**' button.

Customer View

12. Select a *Pricing Item*, then click the '**Add**' button and choose an applicable price type for the course. Repeat to include more price types.
    − Enter the cost (including GST) for the price type in the 'Amount' column.
    − Click the 🖩 icon to calculate the GST.
    − The **Pub** checkbox must be ticked to enable the price type.

13. Click the '**Next**' button.

Customer View

14. Select the '**Programme**' where the course is being held.
15. Select the '**Min clients**' and '**Max clients**'.
16. Complete as required.

> **NOTE**: The Enrolment staff list is used by the feature: Staff Member Alerts on page 189

To add staff members to the **Enrolment staff** list:
    − Click the 🟩 Add button.
    − Select the '**Staff type**' (e.g. Trainer) and the name of the '**Staff member**' from the drop-
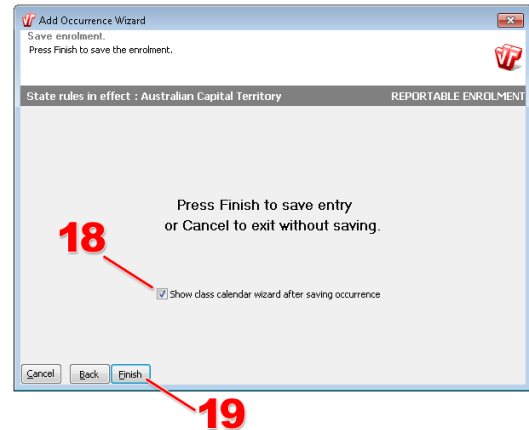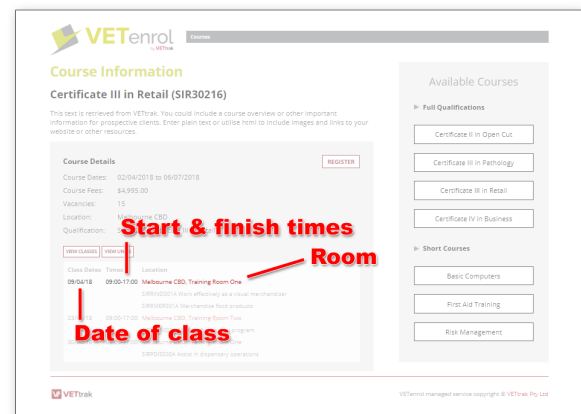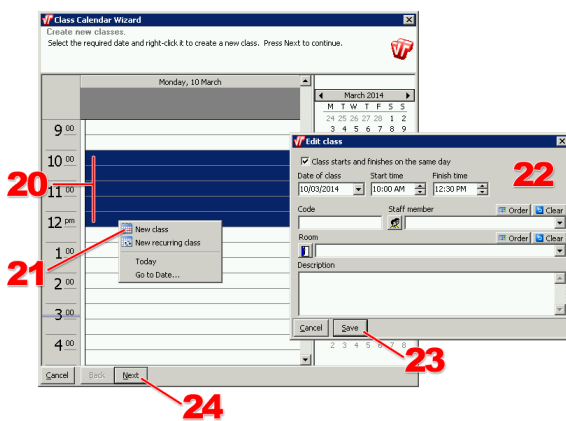
down menus.

– Repeat as necessary.

17. Click the '**Next**' button.

18. Ensure the '**Show class calendar wizard after saving occurrence**' checkbox is ticked.

19. Click the '**Finish**' button.

The **Class Calendar Wizard** will open, displaying the first day of the course as set in Step 3.

Customer View
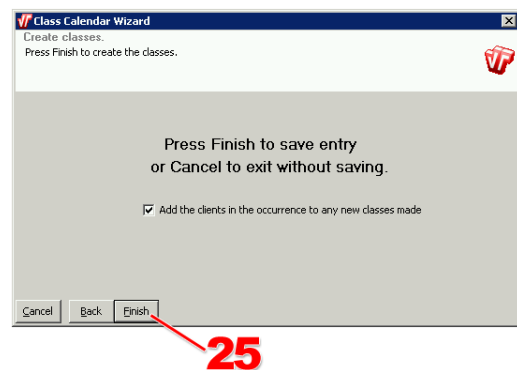
20. Click and drag to select the time period for the class.

21. Right-click to open the menu and select 'New Class'.

22. Enter applicable details.

23. Click the '**Save**' button.

Repeat steps 20 to 23 for additional classes in the course, using the calendar on the right-hand side to navigate to different dates.

24. Click the '**Next**' button.

25. Click the '**Finish**' button.

Publish for Online Enrolment

From VETtrak:
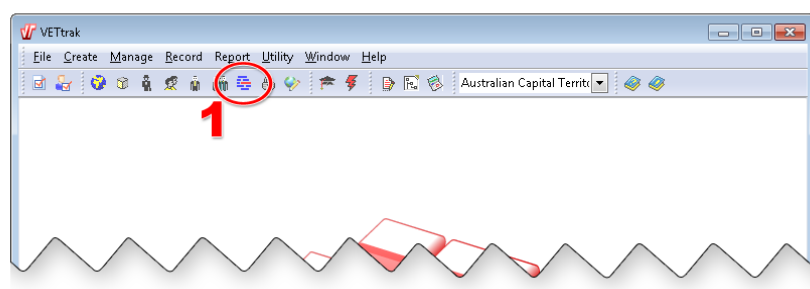
1. Click the icon for Programmes & Occurrences (or press F9 on your keyboard).

2. Expand the programme by clicking ⊞ beside the programme name.
3. Click on the desired occurrence ID.
4. Right-click '**Details**' on the right hand side.
5. Choose '**Edit publish options…**' from the menu.

6. Tick the '**Publish for online enrolment**' checkbox.

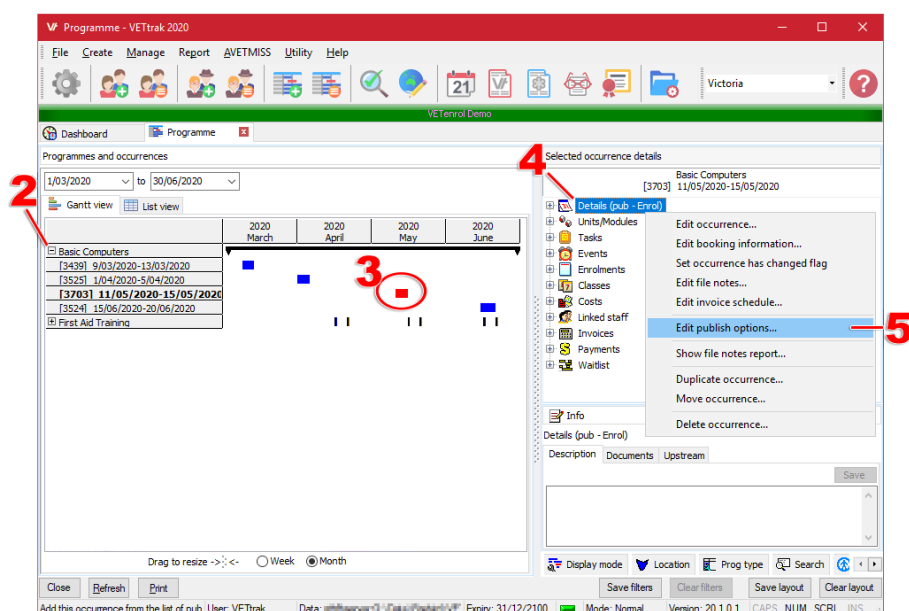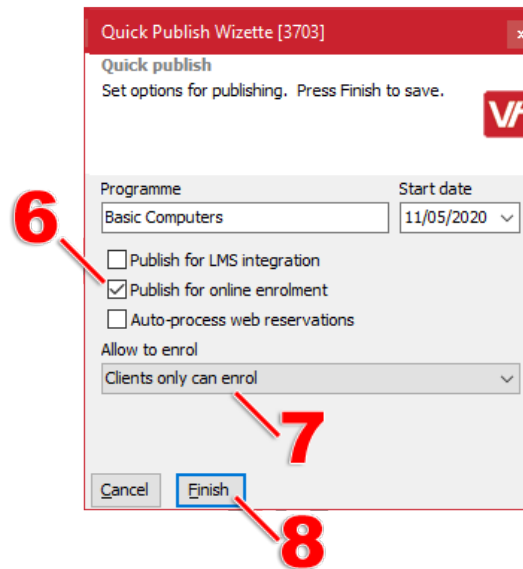7. Select an '**Allow to enrol**' option.

> **NOTE**: VETenrolwill display individual registration and group booking buttons according to Allow to enrol selection for the occurrence.

8. Click the'**Finish**' button.

Repeat steps 2-7 for each occurrence you want to be available for online enrolment. Alternatively, if there are many occurrences to publish, consider using the batch publishing utility.

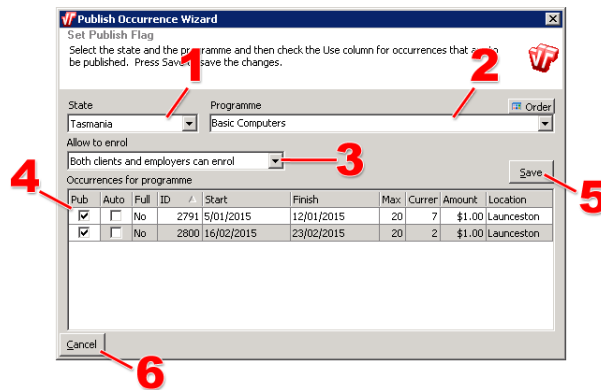VETenrol is now ready to accept customer registrations.

Batch Publishing

VETtrak offers a batch publishing feature in the form of the Publish Occurrence Wizard.

From VETtrak:

- Choose 'Utility' from the menu.
- Select 'Publish Occurrences...'

1. Select the '**State**'.
2. Select the '**Programme**'.
3. Choose the appropriate enrolment option.
4. Tick the 'Pub' checkboxes beside each occurrence to publish. Remember that clicking the '**Pub**' column heading will tick/untick all checkboxes.
5. Click '**Save**' to apply changes.

Repeat steps 1-5 for other states and programmes you want to be available for online enrolment.

VETenrol is now ready to accept customer registrations.

Adding Website Links

Links to VETenrol can be implemented to take customers to different entry points. A list of common URLs are available from Links menu item in the Client Administration. These can be copied and then pasted into an email for your web designer, or into your browser's address bar for testing.

> **NOTE**: Use of the course and occurrence specific links introduces a higher risk of human error as those links require manual entry of identification numbers obtained from VETtrak and then must be closely managed.

> **ATTENTION**: If you (or your web designer) intends to link to VETenrol through an iFrame or Frameset, please see topic Frameset Embedded on page 134 to enable cross-browser compatibility.

> **See also**: URL Querystring Parameters on page 258 and Creating Website Links on page 264 regarding additional linking features.

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Testing

After completing the previous topics, it is recommended that you place a test registration to confirm the system is working and to familiarise yourself with the process for completing a client's enrolment.

The following check list should be followed for each course with occurrences published for online enrolment:

- Check the occurrences are visible :
    - Visit your VETenrol.
      For example: URL https://enrol.vetenrol.com.au/?clientid=VT-DEMO
    - Ensure each course and their occurrences are available.
- Confirm the correct details are displayed.
  Eg. Cost, pricing, vacancies.

Restart your Internet browser, then:

- Check each link on your organisation's website to confirm it is working.

> **NOTE:** If your organisation has custom work applied to VETenrol, it may be practical to adjust the testing check list to accommodate those features.

> **See also**: Managing Enrolments on page 49 to see where the test registration will be received in both VETenrol and VETtrak.

> **See also**: Troubleshooting on page 243 for more information on Occurrences not displaying.

The user Experience

While the overall experience with VETenrol can vary immensely due to it being able to be branded and styled to suit your organisation, there are core features that provide the foundation of the user experience. This section examines those features.

The following topics are addressed in this section:

VETenrol Main Screen

Depending on your organisation's website linking choices, clients may never see this screen. Regardless, it is ideal for testing purposes because the occurrences displayed when a course is clicked are retrieved directly from VETtrak (through the API).

The majority of the elements of this screen are affected by branding, style and other customisation features. They may be in different locations or may not be visible at all in your organisation's version of VETenrol.

> **See also**: Creating Website Links on page 264.

Without a course selected

If VETenrol is started without providing course information, the user will be required to choose a course.
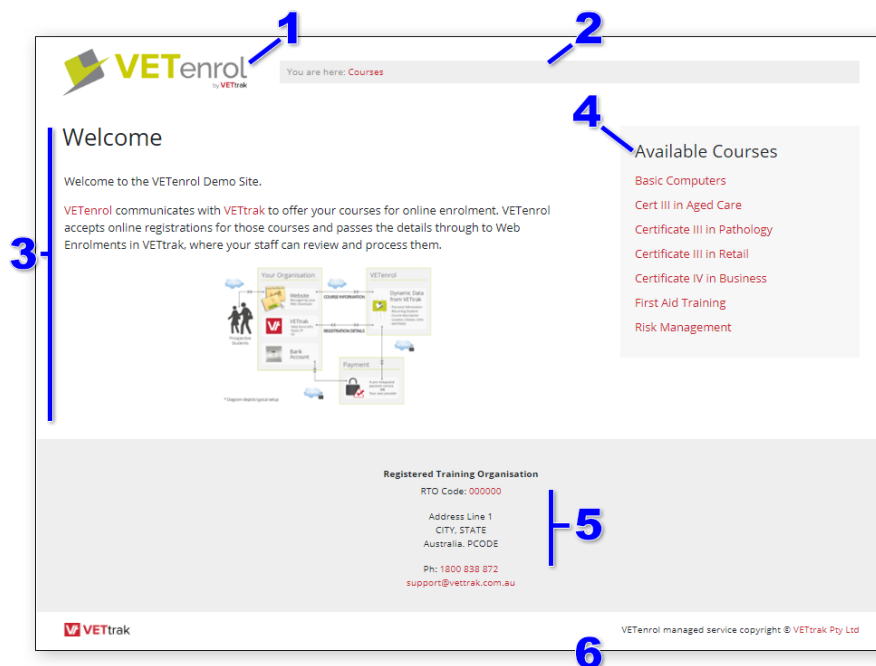
Main screen — course not selected

1. Organisation's logo.
2. Breadcrumb area — A space reserved for links to the current and previous steps in the registration process.
3. Content area — This area is where course information and then the steps in the registration process are displayed. It will exist regardless of branding.
   - The Welcome heading and text are displayed here.

4. Course links — A list of courses with occurrences published for online enrolment as obtained from VETtrak. Clicking an item will display specific details for that course. These links may be categorised depending on branding.

5. Organisation's contact information — As obtained from VETenrol's Settings.

6. Footer — Displays a copyright message.

With a course selected

It is possible to navigate direct to the main screen with a course selected.

Course selected — with occurrences

Course selected — without occurrences

1. Page Heading Text

2. Course name

3. Course description

4. Location selector — A drop down menu to filter the listed occurrences by location. It only appears if a course has occurrences with more than one location.

5. Occurrence details — Important information about the occurrence, such as date of enrolment close and cost.

6. Links to toggle displaying of Class and Unit information.

7. Register buttons for the occurrence.
   - '**Register**' — Starts the registration process for an individual.
   - '**Group Booking**' — Starts the group booking registration process. This will only be displayed if the occurrence has been published in VETtrak to allow Employers to enrol.

NOTE: In a typical set-up the register buttons will be shaded if an occurrence registration close date is in the past but falls within the current month.

8. Course Enquiry form — Allows users to express their interest in a course that does not currently have any up-and-coming occurrences entered into VETtrak. The Show All

Programmes setting, which is ticked by default, must be enabled for this to work.

Calendar

There are two available calendars. In both cases the calendars bypass the typical VETenrol main screen.

Original Calendar
The original calendar offers a monthly view and a category view. The Category View available with this calendar can also be directly linked and used without the calendar.

Modern Calendar
The modern calendar provides a monthly, weekly and daily view plus access to the list of available courses. Colour coding is applied to courses based on the occurrence colour set in VETtrak.
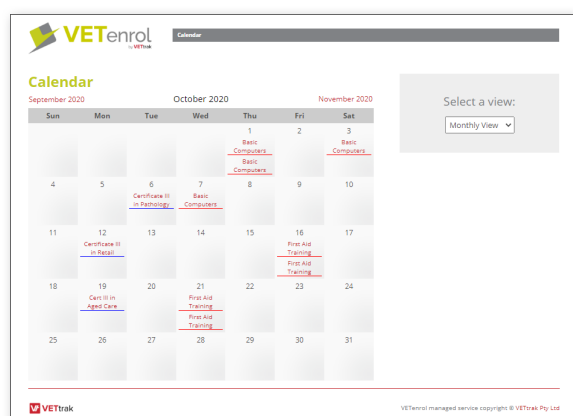
calendar.aspx
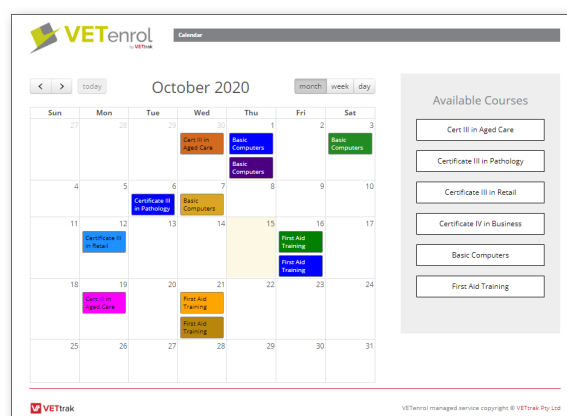
kalendar.aspx

See also: Linking to the Calendar on page 266 and URL Querystring Parameters on page 258 regarding linking to the calendar (when enabled).

Monthly View

Traverse the calendar month to month. Course details are retrieved from VETtrak only for the number of months in advanced specified in the Months to Show setting.
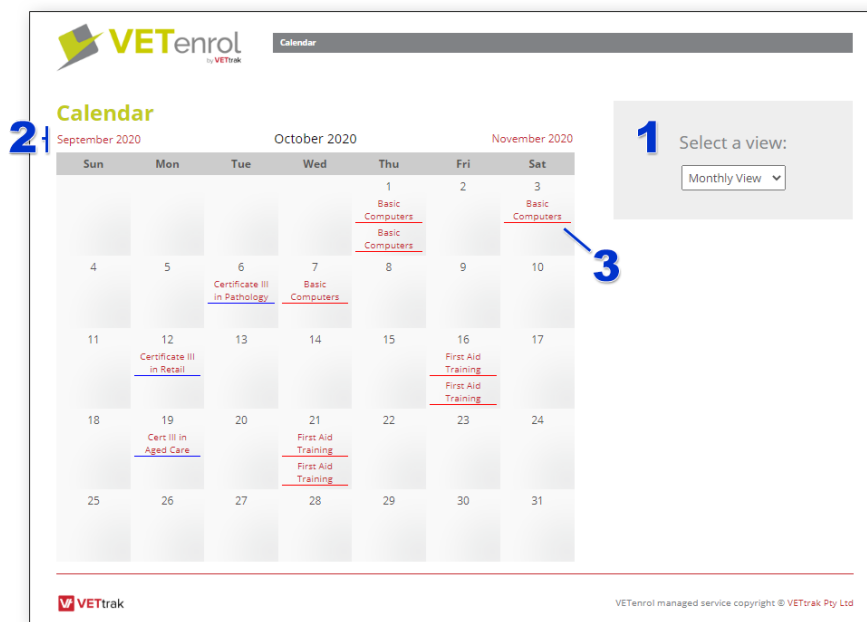
1. Toggle between the Monthly and Category views using the View Selection.
2. Calendar navigation.
   - Link to the previous month. This is not displayed while viewing the current month, since past months are not available for browsing.
   - The month being viewed.
   - Link to next month.
3. An available course.
   Clicking a course opens the occurrence details in a pop-up as detailed in the topic: Occurrence Pop-up on page 34
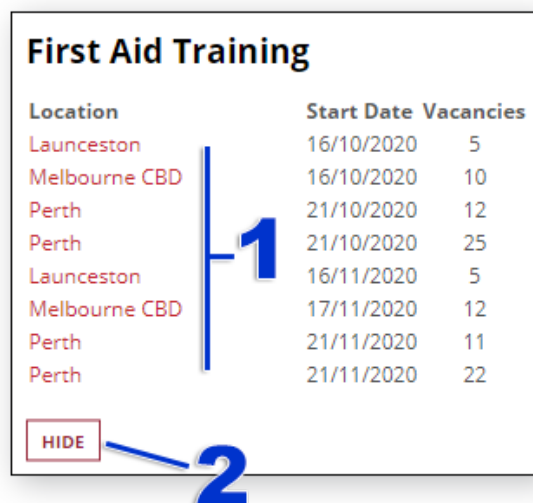
Category View

Shows the calendar legend.

1. Use the View selection to toggle between the Monthly and Category views.
2. A Category. Each category displayed lists:
   – Category heading.
   – Colour coding for the category. Programmes in the category are underlined with this colour on the calendar Monthly View.
   – Available programmes within that category.
   – The number of associated events (available occurrences) for each programme.
3. Clicking a programme will open the Programme popup.

> **NOTE**: Programmes with a single event (occurrence) will open the Occurrence pop-up instead.

Programme Pop-up

The Programme pop-up is opened on the Category View when a user clicks a programme link. It displays each of the available occurrences for the programme.
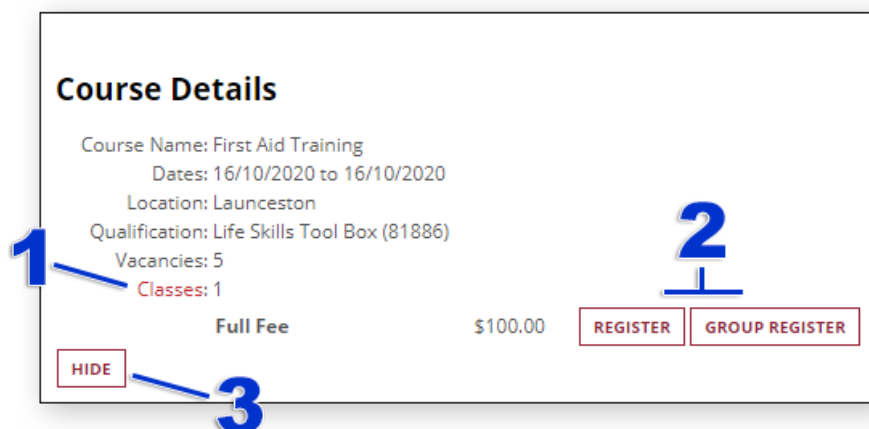
1. Clicking the **Location** link opens the occurrence pop-up.
2. Close the pop-up.

Occurrence Pop-up

The Occurrence pop-up is opened when a user clicks a link in the Monthly View and is also displayed once a user clicks an occurrence from the Category View.

The occurrence details are displayed:

1. Toggle class information.
2. Users can start the registration process by clicking the '**Register**' button.
3. Close the pop-up.

Search

Search provides an alternative entry point to the course selection screen, where users can enter search term(s) to find courses that interest them. The Search page is most suited to cases where there are a high quantity of available programmes.

Only the programme names are searched by default. The option '**Search individual courses**' must be ticked for occurrence data to be included in the search.

For example:

If a user searches for a course code (and qualifications are assigned and set to show for occurrences), the results will be different depending on if the checkbox is ticked:

Advanced Search disabled (☐)   *Advanced Search enabled (☑)*

> See also: Linking to Search on page 267 and URL Querystring Parameters on page 258 regarding linking to the Search page.

Eligibility Calculator

The Eligibility Calculator presents step-by-step questions to determine eligibility for funding. It utilises preset Eligibility Forms. The Eligibility Calculator operates as follows:

An answer must be selected to proceed

- A single question is displayed at a time.
- An answer must be selected for the user to proceed to the next step.
- Each answer must be *Yes* or *No*.
- A *No* answer may lead to a different question than having answered *Yes*.

> Example screenshots depict the NSW Smart & Skilled eligibility form (eID=1) with Demo branding.

Ineligible outcome

Eligible outcome

Once the outcome is reached, the user can click the *Register Now* button. The parameters included in the link provided to the user will determine what will happen next.

If the link included an occurrence ID and price IDs for eligible and ineligible outcomes, the user will be directed straight to the registration process.

Registering (Ineligible) - OccuID and price IDs for outcome provided

Registering (Eligible) - OccuID and price IDs for outcome provided

In the case where an occurrence ID is provided, but not the price IDs for the outcomes, the user is still directed straight to the registration process.

Registering - OccuID but no price IDs for outcome provided

> ⓘ Price ID Exclusions will not be listed. If this leaves only one price type, users will not be provided a choice for pricing.

Otherwise the user will need to select the missing details, such as programme, occurrence, and pricing from the main screen.

Registering - Basic link only

Registering - Programme specified in the link.

> ⓘ When a link has an occurrence ID or a Programme ID consider including the altCSS parameter to hide the course list (typically &altCSS=1).

> 🧩 See also: Linking to an Eligibility Form on page 268 and URL Querystring Parameters on page 258 regarding linking to the Eligibility Calculator.

The Registration Process

This section details the complete registration process as experienced by a user, in its most basic form. Most registration features and all additional steps available through the Client Administration Interface are disabled.

The mandatory registration steps are:

- Personal;
- Details;
- Terms & Conditions; and
- Registration Confirmation.

In addition the Payment step is mandatory depending on the Payment Preferences set within Client Administration Interface and/or the user's payment choice.

Other steps are considered optional, but if enabled within Client Administration Interface, there may be elements within those steps users are required to complete.

> **See also**: Registration Settings on page 141 regarding customising the registration process.

Step 1: Personal

The first step of the registration process requests the user's personal information, such as name and date of birth. Some features differing from those on the main screen are introduced at this point.

1. Breadcrumbs — The navigation links for the registration process, showing the point to which the user has progressed. They appear on each of the registration steps.
2. Registration Heading — The title text used for the registration process, appearing on each of the steps. It can be changed through the Client Administration interface.
3. Course details — The name, date, location, and cost of the course. These details are carried through the whole registration process.
   – The 🛈 icon will open the original course details in a pop-up.
4. Text notice — a customisable notice instructing users on the legal name requirement.
5. Participant matching — If the user has registered for a course in the past, their details can be retrieved from VETtrak and will pre-fill some fields in the registration process.
6. The '**Back**' button — Return to the previous step in the registration process.
7. The '**Next**' button — Proceed to the next step in the registration process.

Step 2: Details

Users are asked to provide their address, contact numbers and emergency contact details.

1. Scroll Bar — The scroll bar appears when there is more information than can be displayed in the browser window. Scrolling down will reveal the remaining fields and the Back and Next buttons.

NOTE: If the Identity step is enabled, citizenship status will not be requested here.

Step 3: Confirm Registration

This step obtains acceptance of the Terms & Conditions and presents the payment options.

1. Terms & Conditions text — This text is set in the Client Administration.
2. Agreement checkbox — The user must tick this box to be able to complete their registration.
3. The '**Payment Method**' selector — This drop down menu allows the user to choose from the payment methods enabled in the Client Administration.
4. The '**Confirm Registration**' button — Once enabled, this button will proceed to the secure payment step, or provide EFT bank details. The registration will appear in Client Administration when this button is clicked.

   – This button will remain disabled until the Agreement checkbox has been ticked.
   – The button should be clicked only once.

> **See also**: Agreements on page 201 to set the Terms & Condition text, and Payment Preferences on page 111 to choose the available payment methods.

Step 4: Payment (credit card only)

users are transferred to the secure server to complete credit card information. For payment methods other than Credit Card, this step will be skipped.

The payment step has different branding requirements and as such you may notice slight differences in the general appearance of this step when compared to other VETenrol steps. In addition, the contact information for your organisation will be displayed on this screen even if it does not feature in the style chosen for the rest of the registration process.

1. '**Card Type**' selector — This drop down menu offers a choice of credit card types based on the settings in the Client Administration.
2. '**Process**' button — This sends the payment through for automatic processing to your merchant provider and redirects to the Registration Confirmation screen.

Step 5: Registration Confirmation

This is a visual notification for a successful registration. An email notification including these details is also sent to the user at this stage.

1. Contact details for the organisation — Obtained from the Client Administration.
2. The '**Print**' button — Clicking this opens the print dialog for printing the confirmation.
3. The '**Close**' button — This will close the registration window if it was opened as a pop-up from your organisation's website.

> **NOTE**: EFT bank account details will also be displayed on this screen if that payment method is enabled and has been chosen by the user.

> **See also**: Client Details on page 105 to set contact information in the Client Administration interface.

Group Bookings

VETenrol offers an alternative enrolment type in the form of the group booking facility. The purpose of which is to accept a registration from an organisation requiring training for a number of employees.

Set the *Publish Options* in VETtrak to accept either individual registrations, group bookings or both on a per occurrence basis.

In most cases both single participant registrations and group bookings are offered as depicted:

Group Bookings have the following mandatory registration steps:

- Booking;
- Places;
- Terms & Conditions; and
- Registration Confirmation.

Only the first two steps are unique, the other mandatory steps are the same as for a normal registration. In addition the Payment step is mandatory depending on the Payment Preferences set within the Client Administration Interface and/or the user's payment choice.

There are other steps, if enabled within the Client Administration Interface, that will also be presented to users as part of the group booking registration process:

- Custom Forms; and
- Custom Agreements.

Step 1: Booking

The first step of the group booking registration process requests the user's business information.

1. The name of the person completing the registration.
2. Company contact information.
3. The number of places to book. '**Reserve Places**' is used to calculate payment amount and to adjust the number of vacancies upon successful registration. Use the '**Update**' button to recalculate price when a change is made.
4. This pricing will not appear until a number is entered into Reserve Places.

Step 2: Places

This step allows the user to provide further details on the participants. Viewing this step is mandatory but providing the requested details on participants is not required.

1. The price based on the number specified for Reserve Places at the previous step (single participant price multiplied by the number of places reserved).
2. The Add booking names feature. Using this feature is not required. It is possible to specify either fewer or more than the reserve places indicated at the previous step.
   - To be able to add a participant, '**Given Name**'and '**Surname**' must be completed.
   - Clicking the '**Add Place**' button saves the details and clears all the fields allowing for a new entry.
3. List of added booking names. This list appears only after the first place has been added, prior to this the statement 'Add booking names above (optional)' is displayed instead.
   - The '**remove**' link deletes the associated record.

History

History is a supplementary VETenrol feature that allows users to provide their credentials to view a summary of their education history with you, their training organisation.

The history provided is not an official qualification or record of competency. Details are obtained from your VETtrak database and is does not need the user to have registered for the training through VETenrol.

For example:
https://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=history.aspx

Users must supply credentials to prove their identity, which is matched with client details in your VETtrak database.

The summary can be viewed and printed, but is not is not an official record or intended to be a replacement for such.

Pay Now

Pay Now is a supplementary VETenrol feature that allows users to pay for their registration.

Users that have fully entered their registration details, but did not provide their credit details to properly complete the registration, can be emailed regarding their non-payment. The *Deferred Payments* feature also uses this process to replace the payment step in the standard registration process.

Requirements for using this feature:

- Credit Card payments enabled in your VETenrol.
- An email template with the type *Pay Now*.
- A registration with the Payment Status of *Pending Payment*, or *Deferred Payment*.

The process for initiating Pay Now is:

- Email the user via the *Registration Details* page, using the icon near their email address **OR** use the Pay Now link for Deferred Payments.
- Select a suitable *Pay Now* template in the Email Client and send the email.

The email contains a link that allows the user to complete the final payment step for their registration.
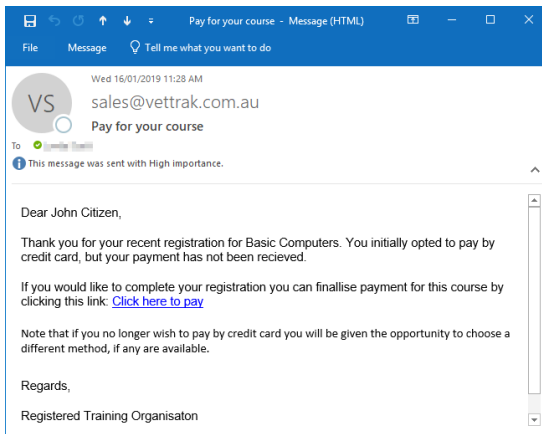
Sample of possible text from a template
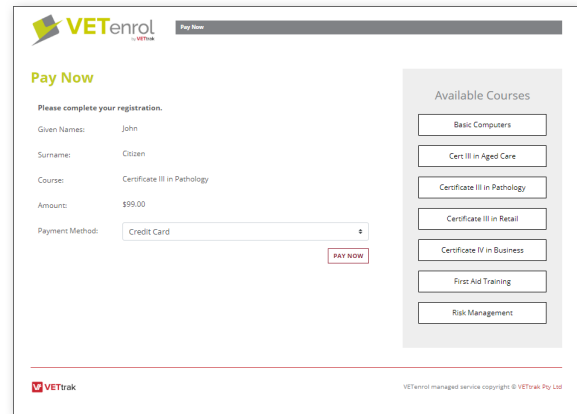
User experience

When a user pays, the registration record in your Admin will be updated to reflect the changes.

> **See also**: Deferred Payments on page 274 regarding using *Pay Now* in place of the payment step in the standard registration process. Creating a Template on page 206 for making an email template for use with Pay Now and Emailing the client (from a template) on page 65.

Schedule

The Schedule provides an alternative entry point to the course selection page, where occurrences are listed in groups based on location (State/Territory). The Schedule page is most suited to cases where the training organisation offers courses across multiple states.

For example:

https://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=schedule.aspx

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Note : The Schedule does not support multiple price types by default - any single occurrence with more than one published price type will be listed multiple times.

See also : Linking to the Schedule on page 267 and URL Querystring Parameters on page 258 regarding linking to the Schedule page. Schedule Settings on page 131 for display settings for Schedule.

Managing Enrolments

This manual often refers to both registrations and enrolments, and while these may seem like two different terms for the exact same thing, there is a distinction intended in this manual.

For the purpose of this manual, a registration cannot be considered as an enrolment until it has been inspected by a staff member and approved. Thus the information contained in VETenrol is considered a 'registration', whereas the same information in VETtrak is considered an 'enrolment'.

This section deals with the process of approving a registration and then completing the subsequent enrolment in VETtrak.

The following topics are addressed in this section:

> **See also**: VETtrak Help Centre website for comprehensive instructions on managing web enrolments in VETtrak.
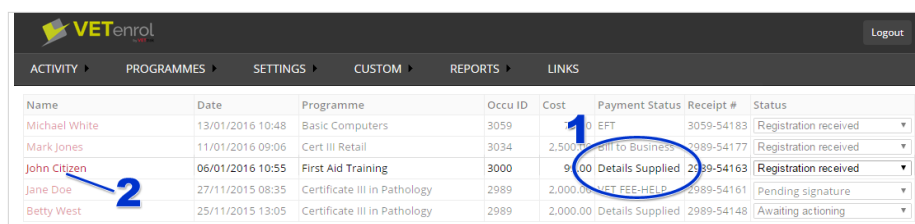
Registrations (Client Administration)

Open your web browser and visit VETenrol Client Administration. Identify the customer's registration in the list.
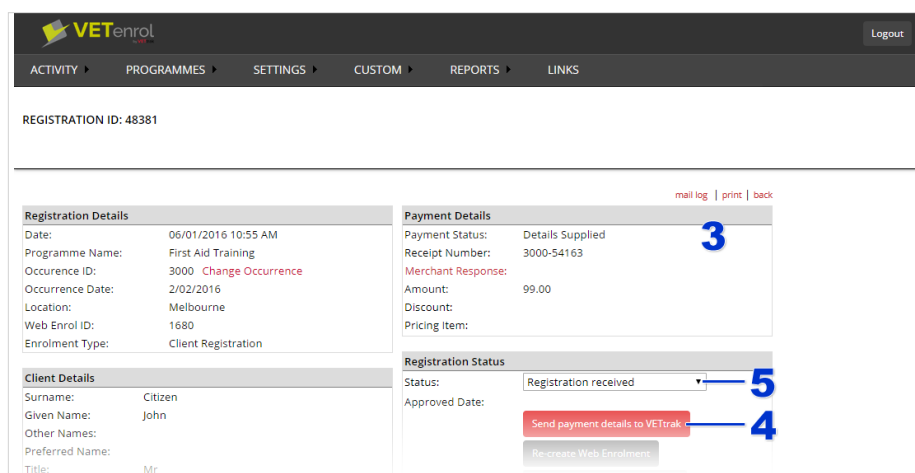
1. Check for a valid payment status.
    For payments made by credit card, this will be *Details Supplied*. If payment is still pending, you may wish to contact the customer as they've opted to pay by credit card but have not completed the payment step.
    If a method other than Credit Card was chosen, then that Payment Method will be listed instead.

2. Click the customer's name to open their Registration Details.

3. Confirm the payment information.
    For credit card payments, if the **Merchant Response** is missing and you suspect the user has actually paid, click the Merchant Response link to attempt to fetch a response from the provider. This is typically only available for registrations with a **Payment Status** of *Pending Payment*.

> **NOTE:** In the case of payment methods other than Credit Card, you will need to implement your own payment verification method to be completed at this point.

4. Click the '**Send payment details to VETtrak**' button, if it is not disabled. If the button is disabled then payment information has already been sent to VETtrak and this step can be
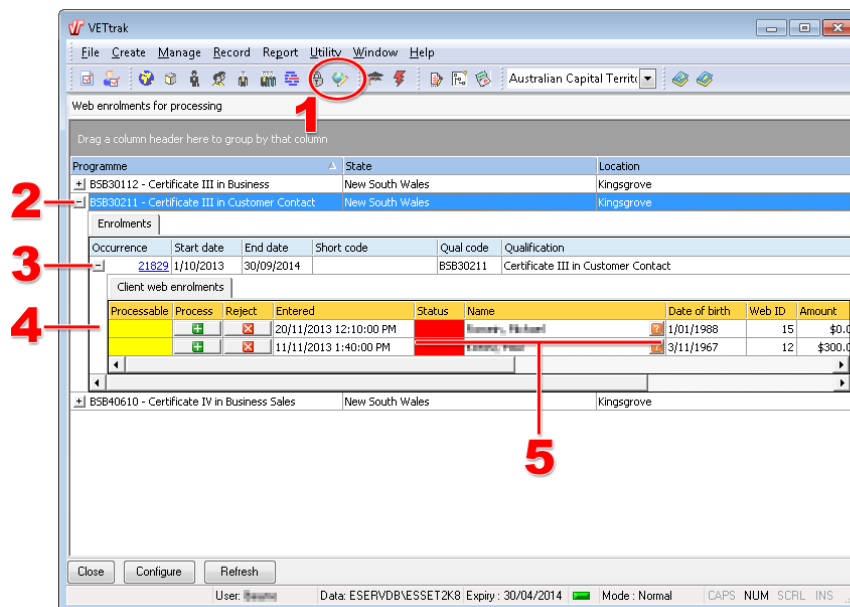
ignored.

5. Choose '*Approved*' from the '**Status**' drop-down menu.

The registration is now ready to be handled as an enrolment in VETtrak.

Enrolments (VETtrak)

From your VETtrak program:

1. Click the icon for Web Enrolments (or press F11 on your keyboard).
2. Expand the programme by clicking the ⊞ icon.
3. Expand the occurrence by clicking the ⊞ icon.
4. Briefly verify the enrolment is valid. If there is an obvious issue with the enrolment, for example it is a duplicate, click the ❌ button to reject the enrolment and permanently delete the record.
5. Click the 🔲 button to open the **Client Match Wizard**.

NOTE: Record information can be adjusted for quality if required, ie. if a participant enters their name in all lowercase letters you may wish to adjust the entry so the first letter of their Surname and Given names are capitialised. Click a field to allow editing and it will be possible to make changes.

NOTE: When matching an existing client, fields are not overwritten by blanks.

6. Select an appropriate action from the drop-down menu. If there are details to compare use your own discretion on selecting to '**Match client and keep existing details**', or '**Match client and update with new details**', otherwise '**Create a new client with new details**'.
7. Click the '**Ok**' button.
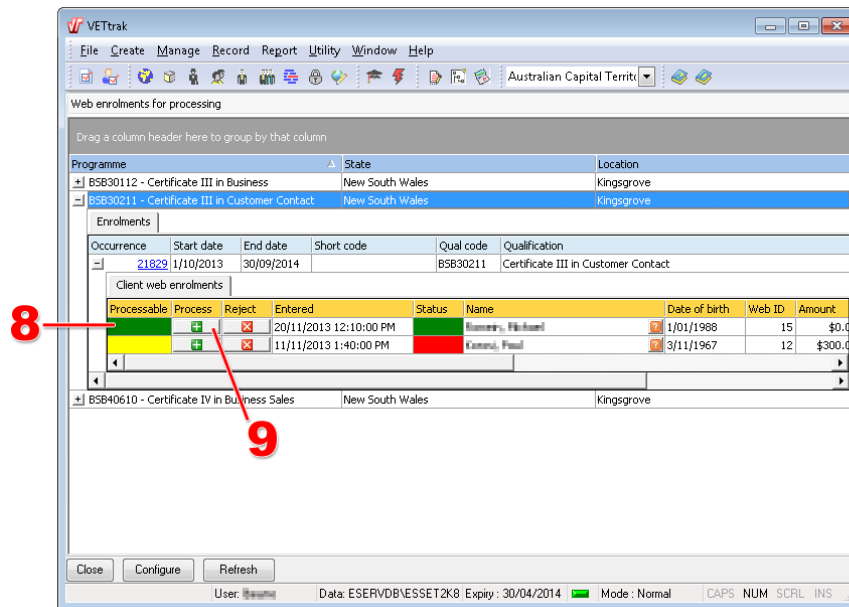
8. Verify '**Processable**' status colour has turned green.

9. Click the [+] button.

The enrolment process is now complete.

Once enrolments are closed for an occurrence you may wish to send email notifications to the participants as described in the next topic.

Customer Notifications

Your customers can be notified of their successful enrolment via VETtrak. The Merge Templates feature enables the creation of an email template with which multiple customers can be emailed information obtained directly from VETtrak.

To make use of this feature, some preparation is required:

- Create a suitable email template for VETenrol customers.
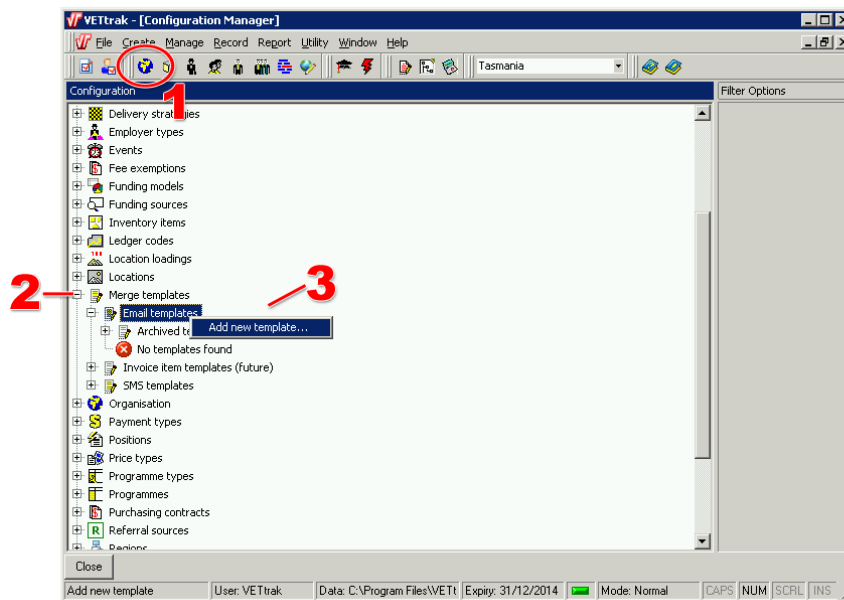- Send the email to customers.

> **NOTE**: Email Preferences in VETtrak Global Configuration must be set for emailing to work.
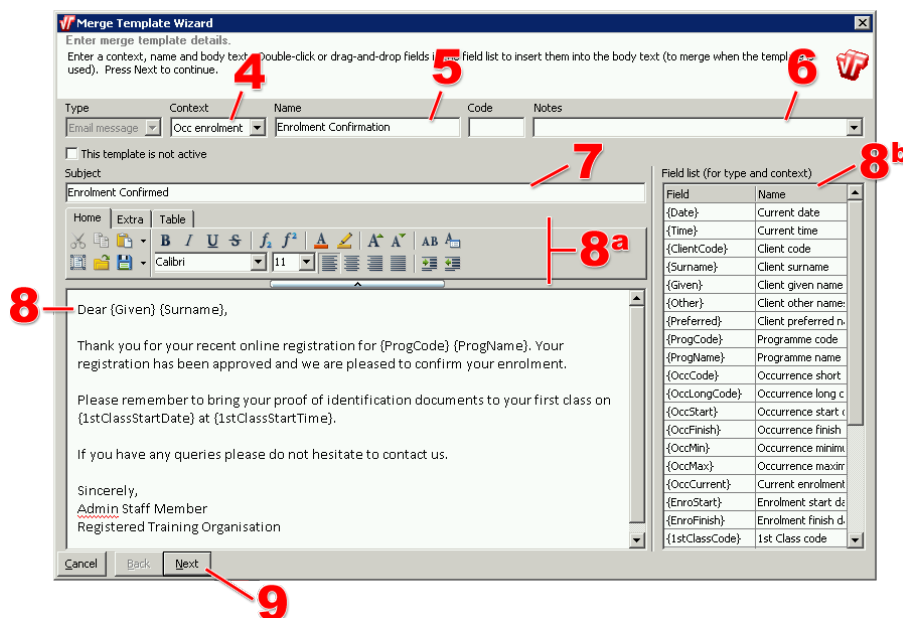
Creating a template

A suitable template only needs to be created once and can then be used over and over.
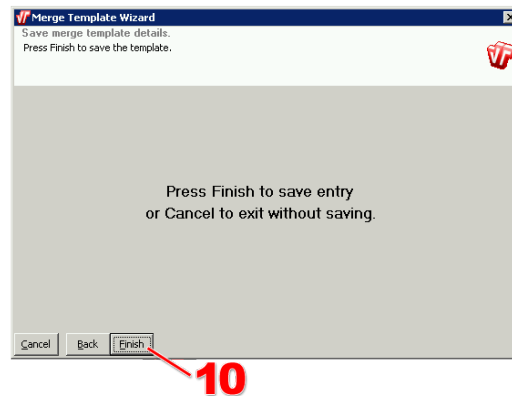
From your VETtrak program:

1. Click the 🌐 icon to open the Configuration Manager.
2. Locate **Merge Templates** and expand it by clicking the ⊞ icon.
3. Right Click **Email templates** and choose '**Add new template..**' from the menu.

This will open the Merge Template Wizard:

4. Select 'Occ enrolment' as the **Context** for the template. This selection controls what will be available in the Field list and where the template can be used.
5. Enter a '**Name**' for the template.
6. Provide a description for the template in the '**Notes**' field if required.
7. Specify the '**Subject**'. This will be used as the subject line for the email.

8. Type an enrolment confirmation message using the formatting tools (8a) and the merge fields (8b).

9. Once you are satisfied with the content and appearance of your message click the '**Next**' button.

10. Click the '**Finish**' button to close the wizard.

The new template will appear under Email Templates, where it can be edited when neccessary. The template is now ready for use.
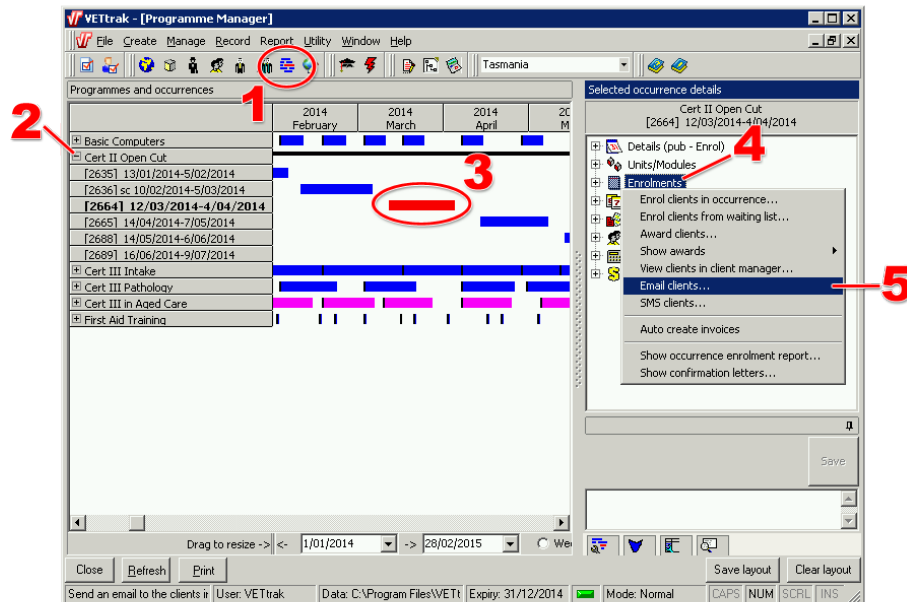
> **NOTE**: Please refer to OzSoft's VETtrak Manual for comprehensive instructions on the Merge Templates feature.

Sending emails from a template

Emails can be sent to each customer enrolled in an occurrence.

From your VETtrak program:

1. Click the icon to open the Programme Manager (or press F9 on your keyboard).
2. Locate the programme name and expand it by clicking the ⊞ icon.
3. Select the occurence.
4. Right click '**Enrolments**'.
5. Choose '**Email clients..**' from the menu.

This will open the Select Email Action Wizette:
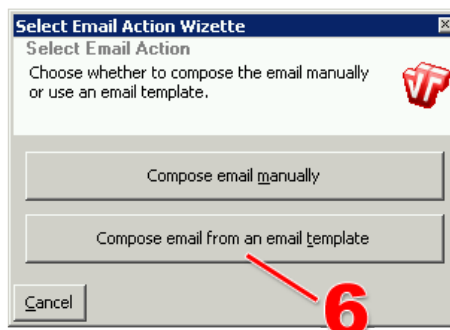
> NOTE: If the wizette does not appear, you have yet to set up an email template with a context set to Occ enrolment.

6. Click the '**Compose email from an email template**' button.
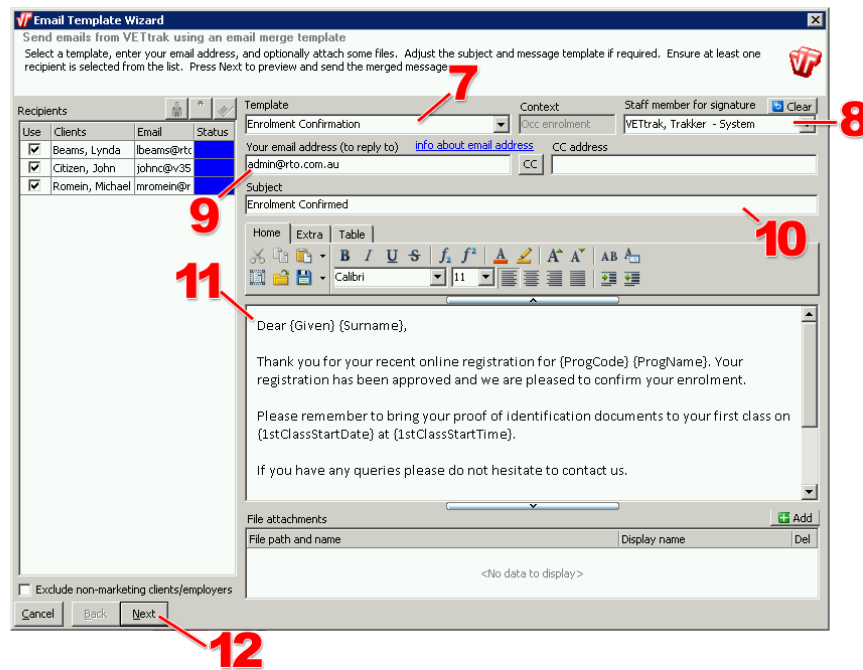
7. Choose the email '**Template**'.

8. Select the '**Staff member for signature**' from the drop-down menu.

9. Enter '**Your email address**', this will be the sender address.

10. You can change the '**Subject**' text if required.

11. Verify the message is the correct template, then make changes if required.

12. Once you are satisfied, click the '**Next**' button.
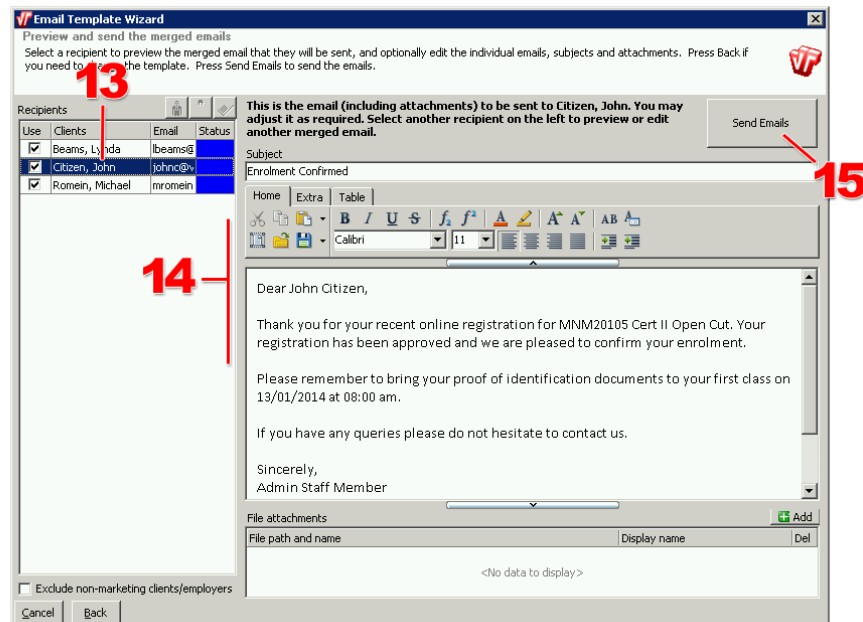
13. Select a recipient to preview.

14. View the merged message.

15. Click the '**Send Emails**' button.

The messages will now be merged and sent to each recipient in the list. The status for each recipient will change to green for success or red for an error.

A message box confirming completion will be displayed:
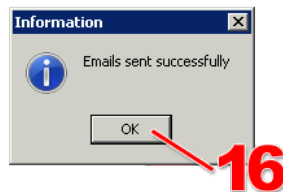
16. Click the '**OK**' button.

You can now close the Email Template Wizard by clicking the '**Cancel**' button (bottom left) or the **X** icon (top right).

Client Administration Interface

Client Administration, often referred to simply as the Admin, is your web-based system for managing VETenrol's settings and registrations received. It will require your Client ID and password to gain access to the information.

The following topics are addressed in this section:

Activity

The *Activity* menu item provides access to various user records categorised by the type of activity.

Registrations

The Registrations screen is the main screen of VETenrol Client Administration. This is where all current registrations are viewed and individual registration details are accessed. It is available from the *Activity* sub menu.

1. '**Registration ID**' — A search feature for finding registrations by Registration ID or Booking Number. Entering a valid ID/receipt and pressing Go will take you to the Registration Details screen for the associated registration.

2. Filter registrations to show only matching records using:
   - '**From**' and '**To**' — to filter by date range. Clicking either field will display a calendar showing a three month period beginning with the current month.
   - '**RTO ID**' — to filter by a specific instance (for clients with more than one VETenrol).
   - '**Programme**' — to filter by programme name.
   - '**Location**' — to filter by occurrence location.
   - '**Occu ID**' — to filter by occurrence ID.
   - '**Occu Date**' — to filter by occurrence start date.
   - '**Family Name**' — to filter by the customer's surname.

3. Actions for the registration list:
   - '**Status**' — filter by the status assigned to registrations. For example, choose '*Approved*' to view registrations that are complete and are no longer displayed on the screen by default.
   - '**Refresh List**' button — applies the filter that is set (if any).
   - '**Reset Filters**' button — removes the current filter (does not apply to Status).
   - '**Export Results**' button — allows the registration list to be saved as an Excel spreadsheet (.xlsx).

4. Registration List table — This is the at-a-glance information provided for each current registration. It is possible to sort the list using the column headers.

- '**ID**' — The unique ID assigned to the record. The IDs listed in this column can be clicked to open individual Registration Details.
- '**Name**' — The customer's full name.
- '**Registration Type**' — Identifies individual and group bookings.
- '**Client ID**' — The instance used to register (only applicable with multiple instances).
- '**Date**' — The date of the registration, specifically when the *Confirm Registration* button is clicked.
- '**Programme**' — The course in which the person wants to enrol.
- '**Occu ID**' — the Occurrence ID of the course as it appears in VETtrak.
- '**Occu Date**' — The start date for the occurrence.
- '**Location**' — The location assigned to the occurrence.
- '**Cost**' — The amount paid or pending payment.
- '**Payment Status**' — Details of the payment.
  Payment Status may be:
    - *Pending Payment* — The customer has opted to pay by credit card but has not completed the secure payment step yet.
    - *Details Supplied* — A credit card payment has gone through.
    - *Blocked (Expired)* — Payment is prevented due to the course expiring before the registration was completed. This requires the Block Expired setting to be enabled, and for the customer to attempt to confirm the registration.

      and, if enabled:
    - *Bill to Business* — The customer has indicated their employer will be paying all costs associated with their registration.
    - *EFT* — Indicates the customer will be paying by direct deposit into your organisation's bank account.
    - *Direct Debit* — The customer wants to pay via a direct debit arrangement.
    - *Invoice Me* — The customer requires you to send them an invoice.
    - *Purchase Order* — The customer will be sending through a purchase order.
    - *VET Student Loans* — Indicates the customer wants to use the Government's VET Student Loans scheme.
- '**Receipt #**' — The receipt number.
- '**Status**' — Identifies the state of the registration.
  Other status can be added, but the defaults are:
    - Registration received — The registration is new.
    - Approved — The registration is complete.
- 💬 icon — View the contact diary entries for the registration.
- 📧 icon — Email the client a message from a template.

5. '**Bulk Action**' — Allows various registrations to be selected using the checkboxes and then actioned by choosing a **Bulk Action** and clicking **Submit**.

Registration Details

This screen displays the complete record for a single registration. All the data the individual customer has entered during the registration process is displayed on this screen.

The Registration Details screen may include additional sections depending on which registration settings were enabled at the time of registration. The following sections will be included at a minimum:

- Registration Details
- Client Details
- Residential and Postal Addresses
- Contact Details
- Payment Details
- Registration Status
- Special Needs
- Terms Agreed To
- Office Use Only Notes

The Registration Details screen primarily acts as a record of information, however there are some important features allowing user interaction:

1. A '**Registration ID**' may be supplied by a student enquiring about their registration, or requested when obtaining support from VETtrak Pty Ltdfor a specific registration.

2. The '**Mail Log**', '**print**' and '**back**' links
   Use these links to open the mail log, print the current registration details, and navigate back to the Registrations screen.

3. The '**Change Occurrence**' link — to choose a different programme/occurrence combination.

4. The '**Web Enrol ID**' link — to check for the matching enrolment in VETtrak for manually processed web enrolments. Web Enrol ID will not be a link if an Enrolment ID has already been retrieved for the registration.

5. The '**Update Changes**' button — for saving changes after editing client details.

6. Apply a '**Status**' to the registration with the drop-down box provided. Choosing 'Approved' will apply the current date and close the registration.

7. Registration buttons
   - The '**Send payment details to VETtrak**' button — updates VETtrak with the customer's payment information.
     - The button will be disabled once the details have been sent or if these details are being sent automatically.
   - The Re- buttons may be needed in various circumstances outside normal operation.
     - '**Re-create Web Enrolment**' will resubmit the registration information to VETtrak creating a new Web Enrolment. This is suitable for enrolments that have failed to send due to technical issues or that have been mistakenly cancelled from the Web Enrolments screen.
     - '**Re-send Participant Notification**' will re-create and send the automated email that was originally sent to the student when the registration was completed. This can be used in cases where students have inadvertently deleted their original email.
     - '**Re-send RTO Notification**' will re-create and send the automated email that was originally sent to the RTO. This can be used in cases where the original email has been deleted.
   - The '**Cancel Registration**' button — for cancelling registrations.
   - The '**Push Uploads to VTDocs**' button — to re-upload copies of the registration details, and files provided during registration so they can be accessed in VETtrak. This button is only available when VTDocs is integrated with VETenrol.

8. The '**PDF Forms**' section will generate the selected form, prefilled with the student's answers when the Download button is clicked. PDF forms can be enabled by request.

9. The '**Contact Diary**' maintains a basic history of activity for the registration. An entry may also be recorded manually using the **Add Entry** button.

10. '**Supporting Documents**' allows related files obtained from external sources to be attached to the registration. Add a document using the **Add File** button. View comments and download existing documents by clicking the filename link from the list.

Updating Client Information

In some cases adjustments need to be made to this information prior to accepting or resending the web enrolment. For example: Typographical errors, capitalisation of letters, or additional information supplied.

1. **Client Details** permits changes to:
   - Family Name.
   - Given Name.
   - Other Names.
   - Preferred Name.
2. **Contact Details** permits changes to:
   - Mobile Phone Number.
   - Email address.
3. Click the **Update Changes** button to save your changes.

> **See also** : Managing Enrolments on page 49 regarding the process for handling enrolments, and Registration Settings on page 141 regarding additional information that can be obtained during the registration process and displayed on the Registration Details screen.

Emailing the client (from a template)

Customers can be emailed, using the ⬇ icon, from the following screens:

- Registrations
- Registration Details
- Enquiries
- Enquiry Details.

For the Registrations and Enquiries screens, the icon is situated to the far right of the record.

In the case of the Registration Details screen, the icon is located on the left in the Contact Detail section.

- Click the email icon near the customer's email address.

This will open the Email Client:

1. Select the **Template** to be sent. This will update the subject and message, and determine the attachments (if any).
2. The **From** field will be pre-filled with the RTO's email address (as entered under General Settings), however it can be changed.
3. The **To** field will be pre-filled with the customer's email address, however it can be changed.
4. Optionally, enter an email address for a blind copy to be sent to in the **BCC** field.
5. The **Subject** will be pre-filled from the template. This can be changed.
6. **Attachments** can be included, these will be in addition to any already assigned to the template.
7. This is the message that will be sent to the customer. Any variables in the template will be substituted for the appropriate value. Changes can be made to the text and formatting if desired.
8. Click the **Send** button when the message is ready to go.

See also: Email Templates on page 205 regarding creating and managing templates.

The Mail Log

The mail log is available from the registration details. It keeps a record of any emails sent to the customer.

- Click the **mail log** link.

This will open the Mail Log:

1. Click the date link to view a copy of the sent message.
2. Click **resend** to send the same email to the recipient again.
3. Click the **Back** button to return to the registration details.

> **See also**: Emailing the client (from a template) on page 65 regarding sending email from VETenrol.

Changing Occurrences

It is possible to change the occurrence into which the student has registered while viewing the Registration details.

This feature allows the programme, occurrence and pricing to be changed for the registration. It is intended to facilitate changes prior to official enrolment, to avoid rejecting the registration and requiring the student to re-register.

Change Occurrence can be used in cases where the student chose an unsuitable course for their skill level, a start date for the course that clashes with prior commitments, or simply picked the wrong pricing for their circumstances. However, it also relies on these issues being identified prior to enrolment, since after that point changes will need to be handled in VETtrak through what ever processes your organisation has in place for such situations.

> *(i)* **WARNING**: Once the associated Web Enrolment has been processed in VETtrak, attempts to change the occurrence will be unsuccessful.

> **NOTE**: In cases where the student has already paid via Credit Card and has overpaid (eg. they were eligible for a concession but picked the full fee pricing instead), or underpaid (eg. picked concession pricing but are ineligible). VETenrol *cannot* refund the fees paid, nor accept further payment. These situations will need to be resolved by other means.

- Click the **Change Occurrence** link.

This will open the Change Occurrence screen:

1. Select the **Programme**, a **Start Date** and **Price**.
   - The **Show all occurrences** checkbox can be used to select from published occurrences with a start date in the past.

2. These options, when enabled, automate maintenance tasks associated with changing the registration:

    – **Automatically delete old web enrolment** will delete the VETtrak web enrolment (if it exists) originally generated for the registration.

    – **Automatically create new web enrolment** will make a new web enrolment in VETtrak for the changed details.

3. Click **Save** to apply the changes.

ⓘ **IMPORTANT** : Re- send the Participant Notification so the student receives the new occurrence details.

Eligibility Outcome

Responses to the questions posed by the Eligibility Calculator can be viewed from the Registration Details screen.

- Click the link for *Eligibility Outcome.*

This will open the Eligibility Steps dialog:

- Review the participant's responses and close the dialog using the '**x**' in the top right corner.

ⓘ Eligibility Outcome only displays when an eligibility form has been completed.

Cancelling a Registration

There are some instances where it may be necessary to cancel a registration:

- The registration was placed as a test or contains obviously fake information.
    - May contain VETtrak Pty Ltd contact information, or a note from the VETtrak Pty Ltd Team identifying the registration as a test.
    - A staff member in your organisation needed to experience the registration process.
    - Most fields contain nonsense, or a single or combination of random letters.
- A duplicate or multiple duplicates of the registration exists.
    - A customer has made multiple attempts to register, or changed their mind about their choice of payment method.
- The customer wants to cancel the registration or has failed to pay.
    - The customer has called or emailed to cancel.
    - The Payment Status of the registration is 'Pending Payment' and has been for over 48 hours.

Cancellations are performed as follows:

1. Identify the registration in the list and click the 'Name' to display the Registration Details screen.

2. Click the '**Cancel Registration**' button situated in the Registration Status section on the right.
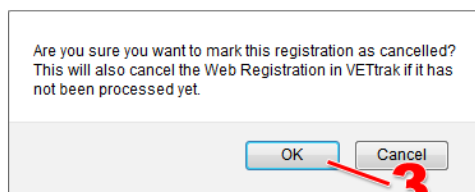
3. Click the '**OK**' button to confirm the cancellation.

After a moment the main Registrations screen will display and the registration will no longer be in the list.

Group Bookings

The Group Booking feature allows an employer to register a number of their employees for a course. In the case where a group booking is received:
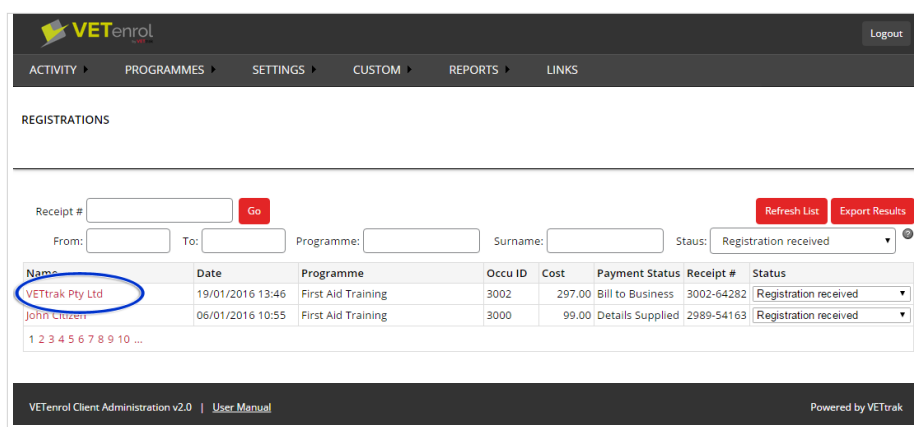
- The name of the company will be listed in the **Name** column.

Clicking the company name will open the 'Registration Details' screen:

- The **Places** section lists the participant names if these details were provided during registration.

> **NOTE**: Providing place details to match the number of reservations is not forced. It may be necessary to contact the employer to discuss their registration.

A Premium license for VETtrak is required to receive group bookings. The registrations are received into VETtrak's Web Enrolments as with a standard registration.

- The occurrence is expanded to reveal a new tab titled '**Employer web enrolments**'.
- The registration is expanded to reveal the individual participants.
- The **Employer** should be matched first, then each participant.

> **See also**: Enrolments (VETtrak) on page 51

Managing Multiple Instances of VETenrol

Clients that have purchased multiple instances of VETenrol can obtain all registrations via the one Client Administration.

- The Client ID column identifies from which VETenrol instance the registration originated.

NOTE: It is recommended that staff members handling registrations in conjunction with multiple instances of VETenrol are issued with the Registration View Only password.

The summary report will display only the links for the current instance. Client ID would need to be substituted to specify an alternative instance.

All administrative settings remain individual to each instance. To administer an instance you must login with the relevant client ID.

Enquiries

The Enquiries menu item, available from the *Activity* sub menu, provides details and management for all enquiries submitted regarding specific occurrences.

1. Filter registrations to show only matching records using:
   - '**From**' and '**To**'— Filter by a date range. The entries will be matched based on the date the enquiry was made.
   - '**Name**' — Filter by the customer's name. The entry will be matched to any part of the name provided by the customer.
   - '**Programme**' — Filter by programme name. The entry will be matched to any part of the programme selected by the customer.
   - '**Status**' — Filter by the status assigned to enquiries. For example, choose '*Complete*' to view enquiries that have received a response and are no longer displayed on the screen by default.

2. List operations buttons:
   - The '**Add Enquiry**' button allows for an enquiry to be added manually.
   - The '**Refresh List**' button will apply or remove filters.
   - The '**Export**' button will save a .xlsx spreadsheet of the displayed records.

3. Enquiries List table — This is the at-a-glance information provided for each current enquiry.
   - '**Name**' — The customer's full name. The names listed in this column can be clicked to open individual Enquiry Details.
   - '**Date**' — The date and time the enquiry was sent.
   - '**Source**' — Where the enquiry came from, typically '*VETenrol Enquiry Form*'.
   - '**Status**' — The status of the enquiry (for administrative purposes).
     This may be:
     - Active — The enquiry is new/unanswered.
     - Cancelled — The enquiry has been cancelled.
     - Complete — A response has been sent that answers the enquiry.
   - '**Email**' — The customer's email address.
   - '**Phone**' — The customer's telephone or mobile number, if provided.
   - '**Programme(s)**' — The course or courses selected by the customer.
   - '**Enquiry**' — The message sent by the customer.
   - 🗩 icon — View notes/comments for the enquiry.
   - ✉ icon — Email the customer a message from a template.

> **See also**: Emailing the client (from a template) on page 65 regarding sending email from VETenrol and Email Templates on page 205 regarding creating and managing templates.

Adding an Enquiry

The Add Enquiry screen displays a form to manually enter an enquiry. For example, this may be used in the case of a telephone enquiry.

- Complete the form with all available details relevant to the enquiry. Some fields are mandatory:
  - Given Name
  - Family Name
  - Message
- Click **Save**.

Enquiry Details

The Enquiry Details screen displays the complete record and contact log for a single enquiry. There are some features allowing user interaction:

1. *Enquiry Details*.
   This section displays the information provided by the customer when they made their

enquiry.

  – click the 📧 icon to email the customer a message from a template.
  – click the '**Back**' button to return to the Enquiries screen.

2. *Office Use.*
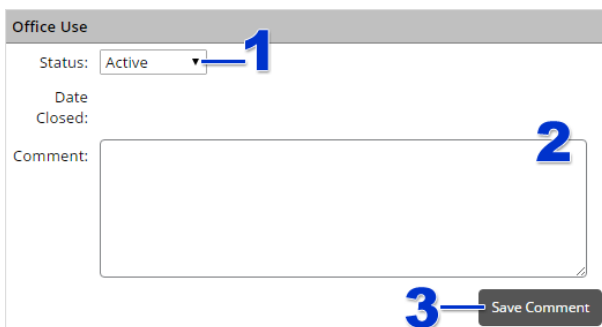   This section provides administrative control for the enquiry.

  – '**Status**' — set the status of the enquiry.
    This may be:

    ▪ Active — The enquiry is new/unanswered.
    ▪ Cancelled — The enquiry has been cancelled.
    ▪ Complete — A response has been sent that answers the enquiry.

  – '**Date Closed**' — the date the status was changed to Completed or Cancelled.
  – '**Comment**' — comments or notes for the enquiry. Eg. a cancellation reason.
  – The '**Save Comment**' button — click this to save status changes and/or comments.

3. Contact Log.

  – '**Date**' — the date and time for the entry. The dates listed in this column can be clicked to view the full message or comment.
  – '**Type**' — the type of record.
    This may be:

    ▪ Email — message(s) sent from within VETenrol in response to the enquiry.
    ▪ Comment — comment(s) added to the Enquiry via the Office Use section.

  – '**Comment**' — the message contained in the comment or email.

Adding a comment to an enquiry

Comments may be added to keep a record of details associated with the enquiry. A comment may accompany a Status change, or simply be added for record completeness.

1. Select an appropriate **Status**, or leave as is if not applicable.

2. Enter the **Comments**.

3. Click the **Save Comment** button to commit the changes.

Viewing an Enquiry comment or message

Comments may be added to keep a record of details associated with the enquiry. A comment may accompany a Status change, or simply be added for record completeness.

- Click the *Date* link to open the record.

This will display the comment details:

In the case of emails, the comment will be formatted to appear as close as possible to the body of the email that was sent. Click [×] to close.

Eligibilities

The Eligibilities menu item, available from the *Activity* sub menu, provides a list of the basic details for all submitted eligibility forms.

The following details are provided, as available:

- '**Name**' — The user's name.
- '**Email**' — The user's email address.
- '**Eligibility**' — The name of the form the user completed.
- '**Date**' — Date the form was completed.

- '**Outcome**' — The result the user obtained on completion of the form.
- '**Delete**' — Click these links to delete the associated record.

Eligibility Details

The Eligibility Details page displays the complete record for a single completed eligibility form.

These are the key features of the page:

1. *Enquiry Details*.
    This section displays the information provided by the customer while completing the eligibility form.
    - click the [icon] icon to email the customer a message from a template.
    - click the '**Back**' button to return to the Eligibilities screen.
2. Eligibility form questions.
    This is a list of questions asked in the eligibility form and the user's answer to each.
3. *Registration*.
    - '**Enrolment ID**' — the ID for the subsequent registration, if applicable. Click the '**Set**' button to retain any changes to this field.
    - '**Comment**' — For staff use. Click the '**Update**' button to save any changes made to this field.

Client Data Completions

The Client Data Completions menu item, available from the *Activity* sub menu, provides a list of the basic details for all submitted data completions.

COMPLETIONS							
Name	Date	Programme	Enro ID	Reg ID	Occu Date	Email Address	
Citizen, John (View)	17/10/2018 11:14	First Aid Training	3343	88015	21/03/2017	johncitizen@testonly.com.au	delete

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- Click the client's name to open the completion details.
- Click Reg ID to open the full registration details.
- The **delete** link will remove the record.

Client Data Completion Details

The Completion Details page displays the whole completion record for a single registration. All the data the individual participant has entered during the registration process is displayed on this page.

The Completion Details page will include the following sections at a minimum:

- Completion Details
- Client Details
- Terms Agreed To

It may also include USI and AVETMISS sections depending on if these settings were enabled at the time of registration.
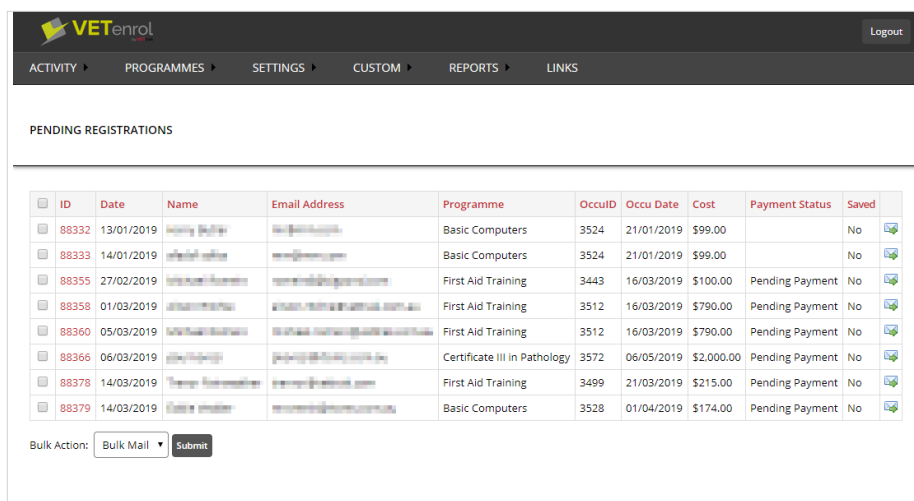
The client can be emailed by clicking the email icon (⬛) next to their email address. This will provide access to mail templates for sending.

Abandoned

The *Abandoned* menu item, available from the *Activity* sub menu, provides a list of all incomplete registrations.

A registration will be included in the Abandoned list if:

- It has been *Saved For Later*.
- The **Payment Status** is *Pending Payment* (credit card payment has been selected, but payment has yet to be made).

The list provides the following features:

- Column sorting — use the column headings to sort the list.
- ID links — Click the ID number to open the Registration Details (this navigates away from *Abandoned*).
- Email — Toggle these individually to determine which records to keep or purge.
- **Bulk Action** — This feature works together with the checkboxes, which indicated when ticked that the record will be part of the bulk action.

See also: Registration Details on page 63 and Save For Later on page 138.

Purge USI Identity Data

The Purge Identity Data menu item, available from the *Activity* sub menu, provides a list of all registrations containing USI identity information.

This is identity data collected for creating a student's USI on their behalf. If the USI step is not enabled or if the RTO create option has always been disabled for the step, then there will be nothing to purge.

The list provides the following details:

- '**ID**' — The registration ID, which can be used from Registrations to find the full details. The checkbox next to the number indicates if the record is currently selected for purging.
- '**Date**' — The user's email address.
- '**Name**' — The name of the person that registered.
- '**Identity type**' — Type of identity document provided.

The following features are provided:

- **From** and **To** date range fields — use these fields to filter the list by date range. Click **Refresh List** to apply the filter.
    - **From** can be left blank to select every registration up to the **To** date.
    - **To** can be left blank to select every
    - Both **From** and **To** can be made blank to clear an existing date range filter.
- Select **none** and **all** links — toggle the checkboxes of all registrations shown in the list.
- Checkboxes — Toggle these individually to determine which records to keep or purge.
- **Purge Data** — click this button to purge all of the USI identity data for the ticked registrations in the list.

> **NOTE**: Purging does not remove the record of the registration, only the associated USI Identity information.

Programmes

The Programmes menu item provides a list of features relating to programmes.

Client Documents

The Client Documents feature allows electronic files to be sent with the automated email received by customers when they successfully register for a course.

Attachments are managed on a per course basis, whereby a file must be uploaded for each individual course. In addition, documents can be set for specific occurrences.

> NOTE: Common file types, such as PDF, are recommended to ensure customers will have the appropriate program on their computer to open the file(s).

> See also: Programmes on the previous page to obtain programme names.

To set a resource for a course:

1. Enter the name of the course exactly as is in VETtrak, including spacing and capitalisation.
2. Optionally, enter an **Occurrence ID** if the document is only for a specific occurrence, or a **Location** for all occurrences matching the location.
3. Click '**Choose File**' (or Browse...) and select the file.
4. Click the '**Save**' button.

The resource will be listed in the table view. To add more documents, repeat the above steps.

> **NOTE**: Multiple documents can be added to the same course.

The documents in the Document List table can be:

5. Edited to change parameters.
6. Viewed by clicking the **Filename** link.
   OR
7. Deleted from the list by clicking the corresponding **delete** link.

List Exclusions

The List Exclusions menu item provides access to the feature used to identify Programmes which will not be available from the main screen. Excluded programmes are still available for registration, however clients need to be directed to the course through a specialised link.

For example: Programmes available only to corporate clients may be in Exclusions preventing the general public from viewing and registering for them.

The Exclusions screen has two key elements:

- The Program Exclusion section — used to create, or modify an exclusion.
- The Exclusions list table — for managing existing exclusions.

> **NOTE**: The Exclusions List table will not be displayed if there are no exclusions.

To Create a new exclusion:

1. Type the '**Programme Name**' in the field provided.
2. Click the '**Save**' button.

The newly created exclusion will be added to the Exclusions List table.

Exclusions in the Exclusions List table can be:

3. Modified by clicking the programme name

   OR
4. Removed from the list by clicking the corresponding '**delete**' link.

> See also: Creating Website Links on page 264 and URL Querystring Parameters on page 258 for more information on specialised linking.

Occurrence Exclusions

The Occurrence Exclusions menu item provides access to the feature used to identify occurrences which will not be available from the main screen. Excluded occurrences are still available for registration, however clients need to be directed to the occurrence through a specialised link.

For example: Occurrences available only to staff members may be in Exclusions preventing the general public from viewing and registering for them.

The Exclusions screen has two key elements:

- The Occurrence Exclusion section — used to create, or modify an exclusion.
- The Exclusions list table — for managing existing exclusions.

NOTE: The Exclusions List table will not be displayed if there are no exclusions.

To Create a new exclusion:

1. Type the '**Occurrence ID**' in the field provided.
2. Click the '**Save**' button.

The newly created exclusion will be added to the Exclusions List table.

Exclusions in the Exclusions List table can be:

3. Modified by clicking the Occurrence ID
   OR
4. Removed from the list by clicking the corresponding '**delete**' link.

See also: Creating Website Links on page 264 and URL Querystring Parameters on page 258 for more information on specialised linking.

Step Exclusions

The Step Exclusions menu item provides access to the Programme Type Exclusions feature where the default steps in the registration process can be overridden based on the Programme Type set in VETtrak.

For example: You may not wish to collect AVETMISS Details for courses that are not accredited.

The Step Exclusions screen has two key elements:

- The Programme Type Exclusion section — used to create, or modify an exclusion.
- The Step Exclusions list table — for managing existing exclusions.

> **NOTE**: The Exclusions List table will not be displayed if there are no exclusions.

To Create a new exclusion:

1. Type the '**Programme Type**' in the field provided.
2. Enable the checkboxes for the Steps to be excluded for the specified Programme Type.
3. Click the '**Save**' button.

The newly created exclusion will be added to the Exclusions List table, where the Programme Type and the number of excluded Steps are displayed.
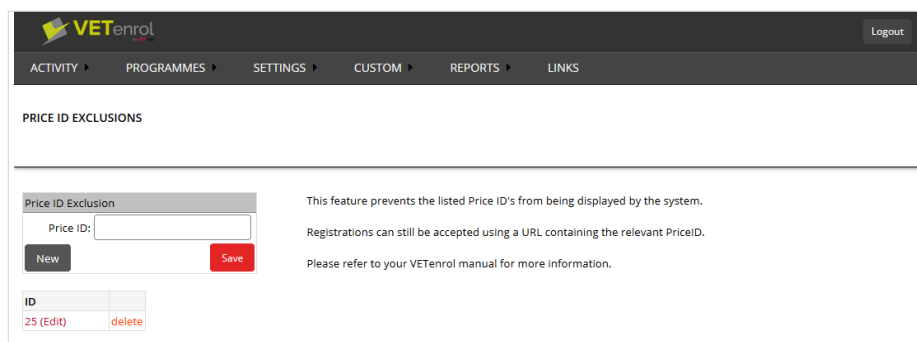

Exclusions in the Exclusions List table can be:

4. Modified by clicking the programme type.

   OR
5. Removed from the list by clicking the corresponding '**delete**' link.

Price ID Exclusions

The Price ID Exclusions menu item provides access to the feature used to identify Price Types which will not be available from the main screen. Excluded price types are still available for registration, however clients need to be directed to them with a specialised link.

For example: Pricing available only with group bookings maybe be in Exclusions preventing the general public from viewing and registering for them.

The Exclusions screen has two key elements:

- The Price ID Exclusion section — used to create, or modify an exclusion.
- The Exclusions list table — for managing existing exclusions.

> NOTE: The Exclusions List table will not be displayed if there are no exclusions.

To Create a new exclusion:

1. Type the '**Price ID**' in the field provided.
2. Click the '**Save**' button.

The newly created exclusion will be added to the Exclusions List table.

Exclusions in the Exclusions List table can be:

3. Modified by clicking the programme name
   OR
4. Removed from the list by clicking the corresponding '**delete**' link.

> See also: Creating Website Links on page 264 and URL Querystring Parameters on page 258 for more information on specialised linking.

Registration Receipts

This feature allows an alternative confirmation email to be sent out based on programme.

The Programme Receipts screen has two key elements:

- The Programme Receipt Template Details section — used to create, or modify an entry.
- The Receipt List table — for managing existing entries.

To create an entry:

1. Enter the '**Programme Name**' for which an alternative email should be used.
2. Select the '**Mail Template**'. Only Mail Templates of type Receipt will be listed.
3. Click the '**Save**' button.

The new entry will be listed in the table view. To add more entries, repeat the above steps.

The items in the Receipt List table can be:

4. Edited by clicking the programme name.
   OR
5. Deleted from the list by clicking the corresponding '**delete**' link.

See also: Email Templates on page 205 regarding creating new mail templates.

Discounts

The Discounts feature allows the creation and management of discount coupon codes. When utilised, entering a valid code results in VETenrol calculating a discounted price based on the regular price and the coupon value.

The Discounts screen has two key elements:

- The Discount Details section — used to create, or modify a coupon.
- The Discount list table — for managing existing coupons.

To create a discount coupon:

1. Enter the '**Code**'. This is the name for the coupon, which must be entered .
2. Optionally, choose your expiry and limited use options:
   – **Expiry (Date)** — enter a date for when the coupon expires. Clicking the field will present a calendar for choosing the date, or type the date in the format of dd/mm/yyyy.
   – **Expiry (# uses)** — enter a number representing how many times the discount code can be used before it expires.
   – **Email Address** — enter an email address to limit all discounts for the code to a specific email. This can be used on its own to indefinitely apply a discount to any or selected programmes, or together with the expiry options.
3. Choose the '**Type**' of discount. The field for the value will be labelled accordingly.
   – *Percentage Off* — the value is the percentage by which the price will be discounted.
   – *Amount Off* — the value is a set dollar amount deducted from the price.
   – *New Amount* — applies the value as the new total price.

> Note: The New Amount type is **NOT** supported by the Shopping Cart when the discount applies to Any Programme. The discount code will not be recognised.

4. Use the '**Notes**' field to enter any extra details regarding the coupon.
   Eg. coupon for advert appearing in newspaper for week beginning 21/08/2017.
5. Choose the option for '**Applies to**' to identify if the coupon is valid when entered for all programmes, or only for specific programmes.
6. Click the '**Save**' button.

The coupon will be listed in the table view. To add more coupons, repeat the above steps.

The items in the Discount List table can be:

7. Edited to change parameters.
8. Assigned to specific programmes by clicking the **Applies to** link.
   OR
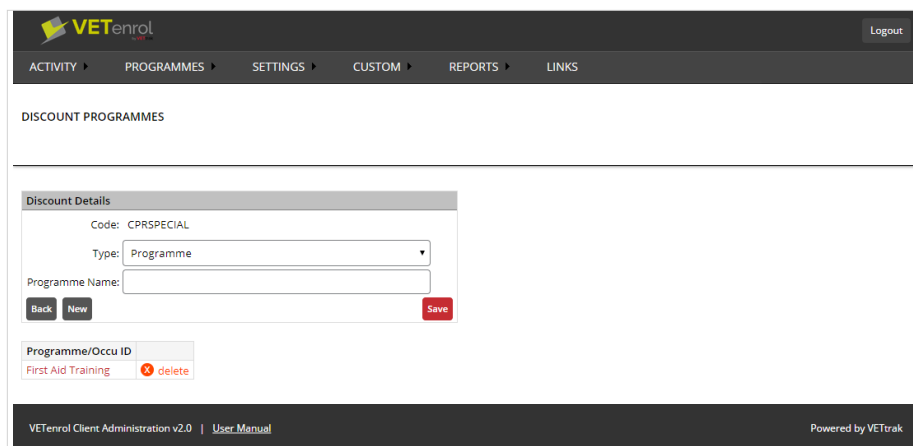9. Deleted from the list by clicking the corresponding '**delete**' link.

Selecting Programmes for Discount Coupons

Discounts that apply to *Selected programmes* allow those programmes and/or occurrence IDs to be viewed and managed from the Discount Programmes screen.

- Click the '**Selected programmes**' link.

This will open the *Discount Programmes* screen, for example:

The *Discount Programmes* screen has the following elements:

- '**Discount Details**' section to facilitate the creation of new programmes/occurrence IDs for the discount and allow existing ones to be viewed and modified.
  - '**Code**' displays the name of the coupon and cannot be changed on this screen.
  - The '**Back**' button will return you to the *Discounts* screen.
  - The '**New**' button clears the *Discount Details* fields for a new programme/occurrence ID to be saved.
  - The '**Save**' button will save the current entries into the list table.
- The list table contains saved programmes/occurrence IDs and allows them to be managed.
  - Click the *Programme/Occu ID* links to modify the entries.
  - Permanently remove unwanted entries using the '**delete**' link.

> **NOTE**: The list table will only be displayed when editing a discount coupon with existing programme/occu ID entries. Otherwise it will be hidden until the first entry is saved.

Adding a Programme/Occurrence to Apply to a Coupon

1. Use '**Type**' to choose either *Programme* or *Occurrence* to specify for what the coupon will be valid.
   This setting will determine the label and expected input for the field below it:
   - '**Programme Name**'
     Enter the exact name of the programme. The coupon will be valid for any occurrence of this programme.
   - '**Occurrence ID**'.
     Enter the occurrence ID of the occurrence for which the coupon is valid. The coupon will only be valid for that specific occurrence (unless other entries exist or are created later).

   For assistance to identify the name or ID to enter, see the .

2. Click the '**Save**' button.

The entry has now been set and will appear in the list table. Repeat these steps to create additional entries as needed.

Discount Behaviour

How can we expect each discount type to function for each of the differing registration processes?

For a discount that applies to any programme:

	Percentage OFF	Amount OFF	New Amount
Standard or Rapid Registration (No Cart)	Reduces the total cost by the discount value (as a percentage).	Reduces total cost by the discount value (as a dollar amount)	Replaces the total cost with the discount value.

	Percentage OFF	Amount OFF	New Amount
Shopping Cart (One course only)	Reduces the only course in the cart by the value (as a percentage).	Reduces the only course in the cart by the value (as a dollar amount).	Replaces the amount of the only course in the cart with the discount value (adjusting the total cost).
Shopping Cart (Multiple courses)	The discount value is applied (as a percentage) to each course in the cart.	The discount is applied (as a dollar amount) to the first course in cart, if any amount remains it will be applied to subsequent courses until the full discount value has been applied or the total reaches 0.	Not Applicable
Group Bookings	Reduces the total cost by the discount value (as a percentage).	Reduces total cost by the discount value (as a dollar amount)	Replaces the total cost with the discount value (regardless of Places reserved).

For a discount that applies to selected programmes:

- In all situations (except the Shopping Cart with multiple courses), if the user is registering for one of the selected programmes, then the discount will be applied if they enter the code.
- In the case of the Shopping Cart where there are multiple courses in the cart, the discount will be applied only to each course in the cart that matches the selected programmes for the discount.

> **NOTE**: Credit Card Discounts and Volume Breaks (Group bookings only) work together with Discount codes for the standard enrolment process, it is possible for all three to be applied to relevant registrations simultaneously. Credit Card Discounts and Volume Breaks do not apply to Rapid Registrations.

Volume Discounts

The Group Booking Volume Breaks feature allows the creation and management of discounting for Group Bookings. Discounts apply based on the number of places the user has indicated during the booking process.

Volume Discounts has two key elements:

- The Volume Break Details section — used to create, or modify a volume break.
- The list table — for managing existing volume breaks.

To create a discount using the '**Volume Break Details**' section:

1. Enter the '**Lower Limit**'. This is the minimum number of places required to obtain the discount.
2. Enter the '**Upper Limit**'. This is the highest number of places to obtain the discount.
3. Choose the '**Type**' of discount. The field for the value will be labelled accordingly.
   - *Percentage Off* — the value is the percentage by which the price per place will be discounted.
   - *Amount Off* — the value is a set dollar amount deducted from the price per place.
   - *New Amount* — applies the value as the new price per place.
4. Choose the option for '**Applies to**' to identify if the discount is valid when entered for all programmes, or only for specific programmes.
5. Click the '**Save**' button.

The discount will be listed in the table view. To add more coupons, repeat the above steps.

The items in the Discount List table can be:

6. Edited to change the Volume Break Details.
7. Assigned to specific programmes by clicking the *Selected Programmes* link in the **Applies to** column.
   OR
8. Deleted from the list by clicking the corresponding '**delete**' link.
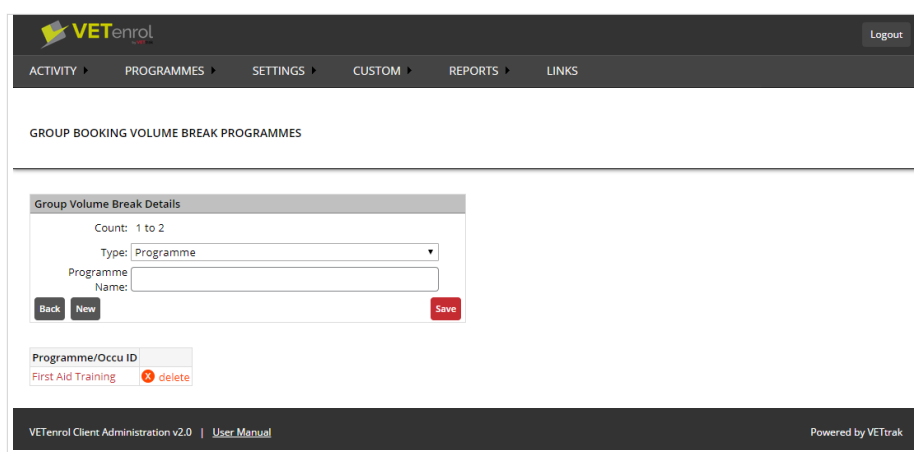
Selecting Programmes for Volume Breaks

Discounts that apply to *Selected programmes* allow those programmes to be viewed and managed from the Group Booking Volume Break Programmes screen.

- Click the '**Selected programmes**' link.

This will open the *Group Booking Volume Break Programmes* screen, for example:

The *Group Booking Volume Break Programmes* screen has the following elements:

- '**Group Volume Break Details**' section to facilitate the creation of new programmes/occurrence IDs for the discount and allow existing ones to be viewed and modified.
  - '**Count**' displays the break range of the discount and cannot be changed on this screen.
  - The '**Back**' button will return you to the *Group Booking Volume Break* screen.

- – The '**New**' button clears the *Group Volume Break Details* fields for a new programme/occurrence ID to be saved.
  - – The '**Save**' button will save the current entries into the list table.
- The list table contains saved programmes/occurrence IDs and allows them to be managed.
  - – Click the *Programme Name* links to modify the entries.
  - – Permanently remove unwanted entries using the '**delete**' link.

> ✎ **NOTE**: The list table will only be displayed when editing a discount coupon with existing programme/occu ID entries. Otherwise it will be hidden until the first entry is saved.

Adding to the List of Selected Programmes

1. Use '**Type**' to choose either *Programme* or *Occurrence* to specify for what the discount break will be valid.
   This setting will determine the label and expected input for the field below it:
   - – '**Programme Name**'
     Enter the exact name of the programme. The discount break will be valid for any occurrence of this programme.
   - – '**Occurrence ID**'.
     Enter the occurrence ID of the occurrence for which the discount break is valid. The discount break will only be valid for that specific occurrence (unless other entries exist or are created later).

   For assistance with identifying the name or ID, see the Summary Report on page 101.
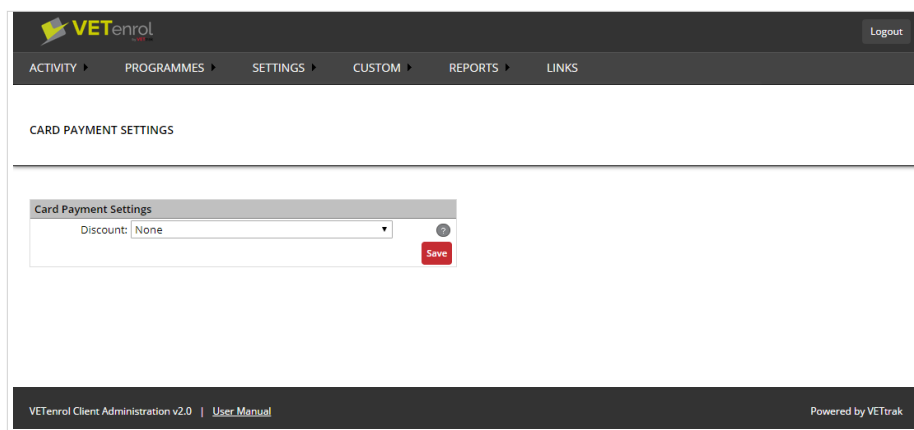
2. Click the '**Save**' button.

The entry has now been set and will appear in the list table. Repeat these steps to create additional entries as needed.

Use the '**Back**' button to return to the main *Group Booking Volume Break* page.
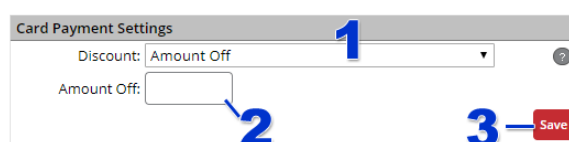
Credit Card Discount

The Credit Card Discounts feature allows a pricing discount to be applied for those opting to pay by credit card.

To create a discount for credit card payments:

1. Choose the '**Discount**' type.
   - *None* — no discount applied (default).
   - *Percentage Off* — the value is the percentage by which the price will be discounted.
   - *Amount Off* — the value is a set dollar amount deducted from the price.

   When a discount other than *None* is selected, a field for the value will be displayed and labelled accordingly.
2. Enter the value of the discount (do not include percentage or dollar symbols).
3. Click the '**Save**' button.

> **NOTE**: There can only be *one* credit card discount. Saving will not make a list as commonly occurs, instead the saved details will remain in the Credit Card Payment Settings section, where it can be adjusted and re-saved at any time.

Close Dates

The Close Dates menu item provides access to the feature used to change when registrations close for occurrences. The default close date for registrations is the start date of the occurrence, however using Close Dates, this date can be overridden by specifying the number of days prior to the start date that registrations should close. Close Dates are applied based on programme name.

For example: A Close Date of 1 # Days will set registrations to close the day before the start date, for a specified programme.

The Close Dates screen has two key elements:

- The Close Dates section — used to create, or modify an exclusion.
- The Close Dates list table — for managing existing exclusions.

> **NOTE**: The Close Dates List table will not be displayed if there are no close dates.

To Create a new Close Date:

1. Type the '**Programme Name**' in the field provided. Leave this field blank if you want the close date to apply to all programmes.
2. Enter the number of Days to close registrations before the start of an occurrence.
3. Click the '**Save**' button.

The newly created close date will be added to the Close Dates List table.

Close Dates in the List table can be:

4. Modified by clicking the '**(Edit)**' link in the ID column.

OR

5. Removed from the list by clicking the corresponding '**delete**' link.

> **See also**: Show Close Dates on page 127 for details on showing close dates for occurrences on the main screen.

Summary Report

The Summary Report provides a list of programmes and their occurrences, as obtained through VETtrak. These are provided for reference and can be useful for obtaining names, IDs and links.

The report contains each available programme, information on each occurrence within a programme and pricing information for each occurrence.

The above summary report depicts one programme with a single occurrence that has two price types, and finally a single programme without any published occurrences that have a start date in the near future.

1. There are a small selection of controls for the Summary Report.
    a. **Workflow** sets the type of URL you want.
        – *Standard* is the default registration type.
        – *Kalendar* shows links to the calendar (with the course list).
        – *Rapid Registration* shows direct links for rapid registration.
        – *Website Widget* shows the iFrame source link for the Courses Page, that will trigger Rapid Registrations (if the feature is enabled).
    b. **Include ALT CSS** allows you to enable and then specify which branding style you need for the links. This is disabled by default. When enabled, An ALT CSS value of:
        – *1* is typically for course specific branding. Ideal if you want links to programmes or occurrences.
        – *2* is typically iFrame branding.
    c. **Show all occurrences** can be enabled to include expired published occurrence in the list.

2. The link to the programme (e.g '**Basic Computers**') is the first record of that programme name, with the least other information in the table. This is a course specific link where users can browse the occurrences for the programme, but no other programmes will be available.

3. If the programme has published occurrences, the link to the occurrence with the most recent start date will be listed (If **Show all occurrences** is enabled this will be the oldest start date). This is a direct link to register in the occurrence. No other programmes or occurrences will be accessible, but it will give users a choice of pricing, if available.

4. Then the links for each price type available for that occurrence are listed (one price type per entry). These are also direct links to register in the occurrence, but a link that includes a price type will pre-select that pricing for the user, making other pricing inaccessible.

5. Once all of the occurrences, and all of the price types for each occurrence have been listed, the next programme will start.

> **NOTE**: Occurrences that are full will not appear in this list.

> **See also**: Categorise Programmes on page 118 regarding Programme Types. Linking to a Specific Course on page 265 and URL Querystring Parameters on page 258 for more on linking.

Linked Occurrences

The Linked Occurrences menu item, available via Programmes > Linked Occurrences, allows a single occurrence to be tied to multiple additional occurrences so that when a user registers for that main occurrence, they will be automatically registered for each of the occurrences that are linked to it.

> **NOTE**: Linked Occurrences is NOT related to Linked Enrolments in VETtrak.

The Linked Occurrences screen has two key elements:

- The Occurrence section — used to create, or modify an occurrence.
- The Occurrence list table — for managing existing linked occurrences.

Occurrences in the list table can be:

- Modified by clicking the occurrence ID.
- Assigned occurrences to be linked by clicking the '**Edit**' link.
- Removed from the list by clicking the corresponding '**delete**' link.

> **NOTE**: The Exclusions List table will not be displayed if there are no exclusions.

Creating a linked occurrence

To Create a linked occurrence:

1. Type the '**Occurrence ID**' in the field provided. This is the main occurrence.
2. Click the '**Save**' button.

The newly created record will be added to the Occurrence List table.

3. Click '**Edit**' in the Linked column of the table.

This will open a new screen for linking occurrences to the original:

4. Type the '**Occurrence ID**' in the field provided. This is for an occurrence in which users will be automatically registered when they register in the original occurrence.

5. Enter the '**Price ID**' to identify the pricing to be applied for the automatic registration.

6. Click the '**Save**' button.

The newly created record will be added to the Linked list table.

Now that the occurrence has been linked:

- Repeat steps 4 - 6 to link additional occurrences.
  OR
- Click the'**Back**' button to return to Linked Occurrences.

Settings

The Settings menu item gives control over many aspects of VETenrol.

> **NOTE**: Each Settings screen provides a 'Save' button which must be clicked to retain changes made to any of the settings on that screen. Refreshing the screen or navigating away before saving will discard any changes.

General Settings

General Settings is a collection of settings required by VETenrol to function. View and modify your organisation's contact information, accepted payment types and more.

Choose '**Settings**' > '**General Settings**' from the menu:

Client Details

Your organisation details as provided in this section are used in both the confirmation screen and automated confirmation email and may also appear during the registration process depending on the branding style of your VETenrol.

>
> **See also**: The user Experience on page 28 regarding the on-screen confirmation, and Confirmation Email on page 199 regarding the automated email.

Registration View-Only Password

This section allows a password to be specified for viewing the registration-oriented interface.

- Type a '**Password**' in the field provided.
- Click the 'Save' button for General Settings to commit the change.

> ⓘ **WARNING**: DO NOT use the same password for both Master and Registration View-Only passwords.

In a typical situation only one staff member will know the master password and be able to administer VETenrol. Other staff members are given the Registration View-Only password in order to complete day-to-day tasks.

To test/use the password, visit https://enrol.vetenrol.com.au/ClientAdmin

1. Enter your '**Client ID**'.
2. Enter the Registration View-Only '**Password**'.
3. Click the '**Logon**' button.

The Client Administration interface will open to the Registrations screen as normal, however the interface will not contain any of the administrative features.

The interface does allow all registration tasks to be completed, though it only offers the following menu items:
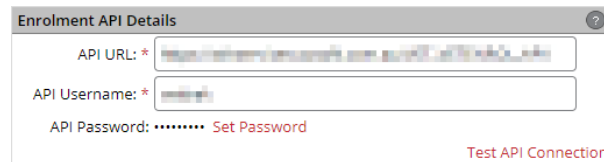
- '**Registrations**' — A summary of pending registrations.
- '**Summary Report**' — a list of all published programmes and occurrences from VETtrak.
- '**User Manual**' — A link to the PDF of this document.
- '**Logout**' — Exit the Client Administration interface.

> 🧩 **See also**: Changing your Password on page 17 regarding changing the master password for the Client Administration interface.

Enrolment API Details
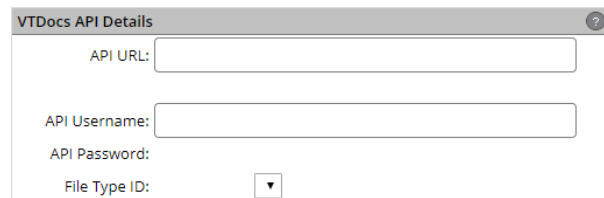
These details enable VETenrol to connect to VETtrak through the API.

> ✎ **NOTE**: The API URL needs to point to the location of the vt_api.asmx file, but that filename should not actually be included in the URL.

VTDocs API Details
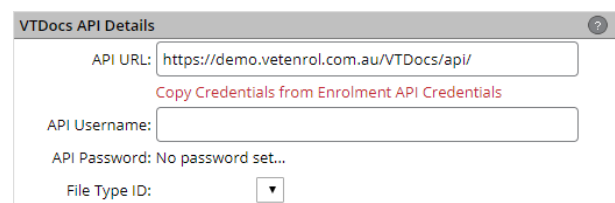
These details enable VETenrol to connect to VTDocs.

> ✎ **NOTE**: The VTDocs integration is only available to clients hosting their VETtrak database with VETtrak Pty Ltd.

To set up your VTDocs integration:

- Enter your **API URL**.
    - The API URL is the address to your VTDocs with /api/ appended.
- Click the **Save** button for the page to commit these details.

Example of Demo API URL entered & Saved

- Click the '**Copy Credentials from Enrolment API Credentials**' link.
  - **Username** and **Password** are for the user assigned to this role during the VTDocs integration process (Typically the same credentials used to access the Enrolment API).

Example of credentials copied & saved

- Click the **Save** button for the page to commit these details.

- **Test API Connection** should be clicked to test the entered credentials with VTDocs. It will display a token in a new tab in your browser, or an error message if unsuccessful.

• Click the **Fetch File Types** button. • Choose *Web Enrolment* or a similar file type from the **File Type ID** drop-down menu. • Click the **Save** button for the page again.	*Example of File Types fetched and making a selection*
The selection list will be cleared and the File Type ID stored. Copies of the registration details, and any documents the user submits during the registration process will be uploaded to VTDocs	*Example of Demo API set up complete.*

> **See also**: VTDocs Integration on page 285 for details on the initial set up and where to access the documents via VETtrak.

Admin Correspondence Emails

This section is for the email addresses to which you want VETenrol update notifications and other correspondence to be sent.

- Type a '**email**' in the field provided. Multiple addresses should be separated with a semi-colon (;).
- Click the 'Save' button for General Settings to commit the change.

SMTP Server

Completing these details will enable VETenrol to send all automated notifications via the specified mail server instead of using VETtrak Pty Ltd's mail server.

- Enter the '**Server**' address. For example: smtp.yourcompany.com.au
- Enter the '**Username**' to access the server.

> (i) For some SMTP Servers the *Username* needs to be the same as the email address in your Client Details section because it is used as the *From* address for outgoing mail.
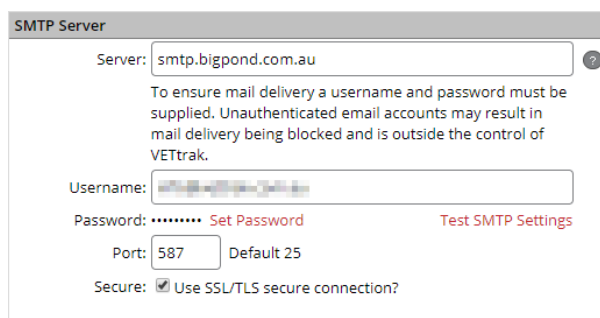
- Specify the '**Port**' the server uses for sending mail.
- Tick '**Use SSL/TLS secure connection**', if applicable.
- Click the 'Save' button for *General Settings* to commit the change.
- Click the '**Set Password**' link, which will open a pop-up window.

- Enter the password.
- Click the '**Set Password**' button.

Once the details are saved, a Test link will appear near the credentials.

- Click '**Test SMTP Settings**' to open a pop-up window and send a test email.

- Enter an email address in the Recipient field, such as your own personal email or
- Click the '**Send Test Mail**' button.
- Check that the email has been received.

> ⓘ Your SMTP details could be set up in your VETtrak, in which case you can view them there to ensure you have entered the right details for VETenrol.

Payment Settings

Payment Settings is a collection of settings required by VETenrol to determine the payment options offered to your customers. Set global payment options and choose payment methods for individual and group bookings.

Choose '**Settings**' > '**Payment Settings**' from the menu:

Payment Preferences

Set the payment types accepted by your organisation.

1. Merchant details.
   These details are used to connect to the payment system of your choice. An account with the Merchant Provider is required. These settings will be pre-set as part of activating your VETenrol service, or when you opt to integrate with a merchant provider. Please contact VETtrak Pty LtdSupport if they require adjusting.

2. VETtrak integration.
   - '**Don't send price types to VETtrak?**' checkbox — Prevents price types from being retrieved by VETtrak, if enabled. Please consult Support before enabling this option.
   - '**Send payment details to VETtrak?**' checkbox — Toggle automated sending of payment information to VETtrak. This option will be disabled if a '**Merchant Provider**' is not selected.
   - '**Create VETtrak invoice?**' checkbox — Enable the automatic creation of invoices within VETtrak from customer registrations.
   - '**Send Client PO Number on VETtrak invoice**' checkbox — Enable Purchase Order numbers to be pushed to the Order Number field on the VETtrak Invoice. This can only be ticked if *Create VETtrak invoice* is enabled.

3. '**Card Types**' checkboxes.
   These options indicate which card types are enabled. Please contact VETtrak Pty Ltd Support if they require adjusting.

4. Other options.
   It is the responsibility of your organisation to implement suitable procedures to verify and process registrations where any of these payment methods have been chosen. I.e. In the case of the EFT payment option, your procedure would include checking that the funds have been deposited to your nominated account.
   - **Allow discounts?**' checkbox — Enable this option to permit customers to enter a discount coupon code.

– '**Allow EFT Payment Option?**' checkbox — Enabling this option will permit customers to choose to pay by electronic funds transfer from their bank account directly to yours. This will also enable the fields for you to supply your bank account details.

> **NOTE**: Ensure the EFT bank account details are accurate or customers will not be able to deposit funds.

Individual Registration Payment Preferences

These preferences apply only to individual registrations.

> **NOTE**: These payment options are NOT automated. It is the responsibility of your organisation to determine the validity of registrations where any of these payment methods have been chosen and to implement processes accordingly.

- '**Allow Bill to Business?**' checkbox — Enabling this option will permit customers to choose for their employer to pay for the course. When the invoice is generated in VETtrak the invoicee will be the employer the participant has specified during the registration process. The Employer can be matched in VETtrak Web Enrolments before being accepted.

  – '**Remove Bill to Business option if step excluded?**' checkbox — Enabling this will remove Bill to Business as a payment method if the Employer step is enabled, but excluded from the registration process using *Step Exclusions*.

- '**Allow Invoice Me Payment Option?**' checkbox — Enabling this option will permit customers to avoid immediate payment by requesting an invoice.

- '**Allow Study Loan Payment Option?**' checkbox — Enabling this option will permit customers to choose Study Loan as their payment method.

- '**Allow Fee Waiver Payment Option?**' checkbox — Enabling this option will permit customers to choose to Apply for a Fee Waiver as their payment method.

- '**Allow VET Fee Payment Option?**' checkbox — Enabling this option will permit customers to choose VET Fee as their payment method.

  - '**Remove VET Student Loans option if step excluded?**' checkbox — Enabling this will remove Bill to Business as a payment method if the VET Student Loans step is enabled, but excluded from the registration process using *Step Exclusions*.

- '**Allow Direct Debit?**' checkbox — Enabling this option permits customers to choose Direct Debit from Bank Account or Credit Card as their payment method.

- '**Allow Payment Plan?**' checkbox — Enabling this option permits customers to choose Course as their payment method.

- '**Allow Fees to be paid by Jobactive Provider?**' checkbox — Enabling this option permits customers to choose Course Fees to be paid by Jobactive Provider as their payment method.

- '**Allow Purchase Order Payment Option?**' checkbox — Enabling this option permits Purchase Order as a payment method and requires a purchase order number. This option is intended for Group Bookings but will also be available to individuals if enabled.

- '**Allow EziDebit Payment Plan?**' checkbox — Enabling this option will permit customers to choose to pay by EziDebit payment plan. This will also enable the checkboxes for you to choose the allowed frequency of payment.

- '**Allow Debitsuccess Payment Plan?**' checkbox — Enabling this option will permit customers to choose to pay by Debitsuccess payment plan. This will also enable the checkboxes for you to choose the allowed frequency of payment.

- '**Instructions**' text area — text/html entered here will be displayed after the *Payment Options* heading and before the payment method drop-down menu, for all individual registrations. The edit icon to the right of the text area will open a text editor where text can be entered and formatted. The resulting html will be inserted into the text area once OK is clicked.

> **See also**: Step Exclusions on page 87 regarding excluding registration steps based on Programme Type.

Group Registration Payment Preferences

These preferences apply only to registrations for Group Bookings.

> **NOTE**: These payment options are NOT automated. It is the responsibility of your organisation to determine the validity of registrations where any of these payment methods have been chosen and to implement processes accordingly.

- '**Allow Bill to Business?**' checkbox — Enabling this option will permit customers to choose for their employer to pay for the course. The Employer can be matched in VETtrak Web Enrolments before being accepted.
- '**Allow Direct Debit?**' checkbox — Enabling this option permits customers to choose Direct Debit from Bank Account or Credit Card as their payment method.
- '**Allow Payment Plan?**' checkbox — Enabling this option permits customers to choose Course as their payment method.
- '**Allow Purchase Order Payment Option?**' checkbox — Enabling this option permits Purchase Order as a payment method and requires a purchase order number. This option is intended for Group Bookings but will also be available to individuals if enabled.
- '**Allow EziDebit Payment Plan?**' checkbox — Enabling this option will permit customers to choose to pay by EziDebit payment plan. This will also enable the checkboxes for you to choose the allowed frequency of payment.
- '**Allow Debitsuccess Payment Plan?**' checkbox — Enabling this option will permit customers to choose to pay by Debitsuccess payment plan. This will also enable the checkboxes for you to choose the allowed frequency of payment.
- '**Instructions**' text area — text/html entered here will be displayed after the *Payment Options* heading and before the payment method drop-down menu, for all group bookings. The edit

icon to the right of the text area will open a text editor where text can be entered and formatted. The resulting html will be inserted into the text area once OK is clicked.

Rapid Registration Payment Preferences

These preferences apply only to rapid registrations.

> **NOTE**: These payment options are NOT automated. It is the responsibility of your organisation to determine the validity of registrations where any of these payment methods have been chosen and to implement processes accordingly.

- '**Allow Pay in Person?**' checkbox — Enabling this option will permit customers to choose to defer payment until they can pay in-person over the counter.

- '**Allow Invoice Me Payment Option?**' checkbox — Enabling this option will permit customers to avoid immediate payment by requesting an invoice.

Site Settings

These settings primarily alter the appearance and functionality of the VETenrol main screen.

See also: The user Experience on page 28 for more information regarding the main screen.

Courses

The settings in this section generally affect the available courses on the main screen and how they are displayed when selected.

Months to Show

VETenrol will display courses with an enrolment close date falling within the time frame specified in this field. Courses occurring beyond the number of months specified will not be shown.

For Example:

<table>
<tr><td>*1 Month*</td><td>*3 Months (Default)*</td></tr>
</table>

Categorise Programmes

This feature sorts programmes into categories as per the Programme Type set for the programme in VETtrak. It is intended to improve the customer experience when there are large quantities of available programmes.

For Example:
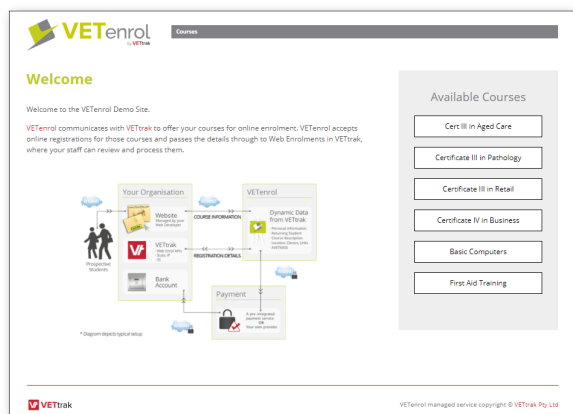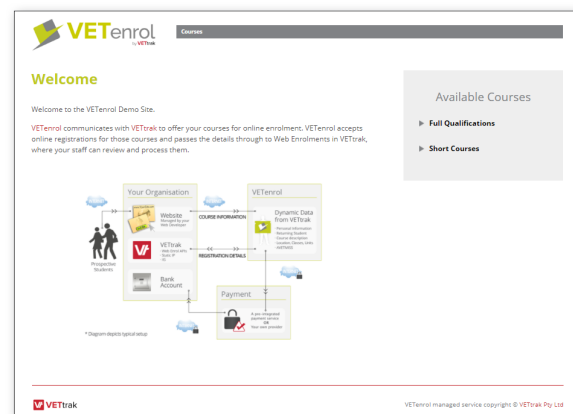
Disabled (☐ default)   Enabled (☑)

Show all Programmes

This setting toggles the display of courses without current occurrences. The primary function of this setting is to allow email enquiries for those courses.
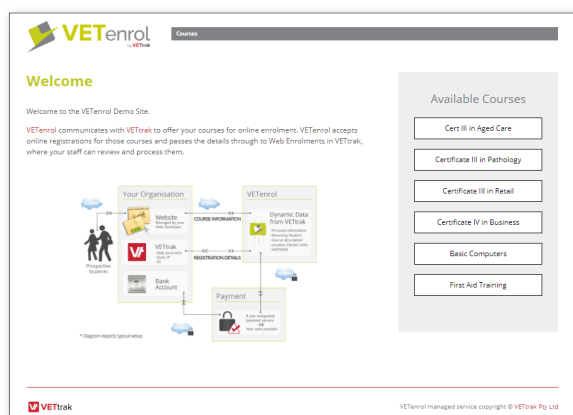
Disabled (☐)   Enabled (☑)
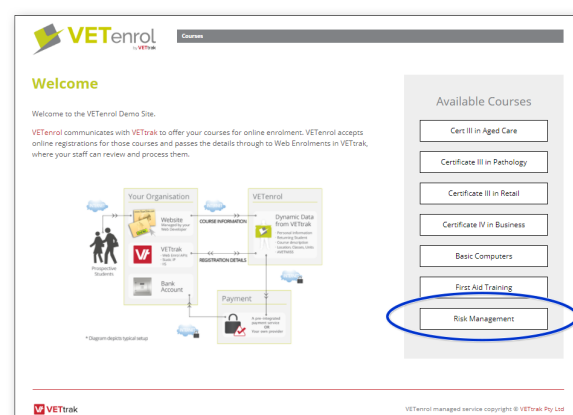
See also: .

Show all Occurrences

Enable this option to display inactive/closed occurrences. This will result in displaying every past occurrence that is still published for any programme that also has at least one occurrence published in the future with a start date falling within the time frame set by the *Months to Show* value.

For example:
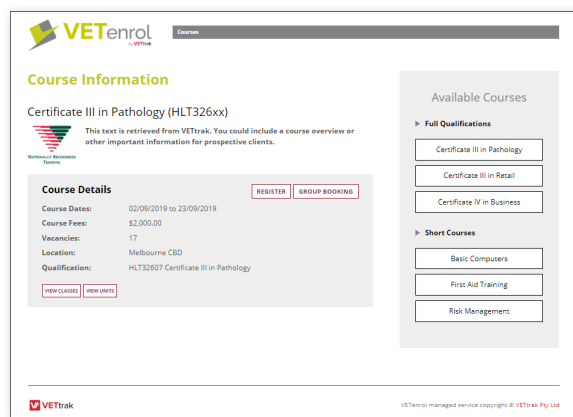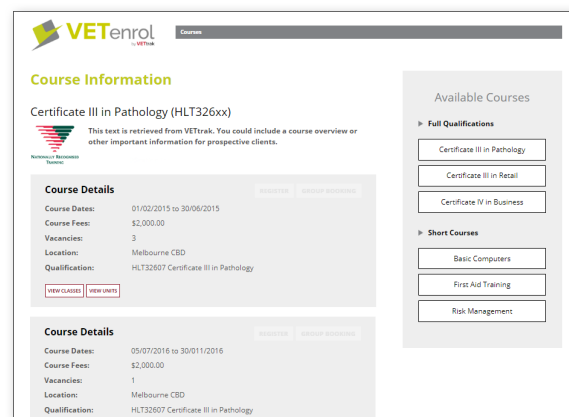
Disabled (☐)   *Enabled (☑)*

This option can extend page load times significantly and should be used in combination with VETtrak's Unpublish feature to manage occurrences.

Block Expired

Toggle this option to prevent registrations being completed after the Start Date (or Close Date) for an occurrence.

This is especially applicable to registrations that have been Saved for Later, but will also apply in cases where registrations have been left too long.

For example: A registration begun on the day of the close date, but not completed until after midnight (making it after the close date), will be caught by the Block Expired setting.
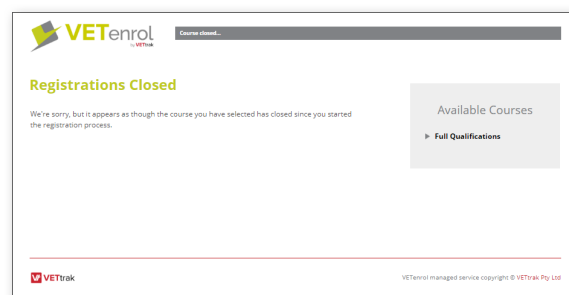
Enabled (☑)
The Registrations Closed page is triggered when the user clicks "confirm registration", but the occurrence is no longer accepting registrations.

NOTE: This setting should NOT be used in combination with 'Enable Prior Enrol'.

See also: Save For Later on page 138 and Close Dates on page 99.

Enable Prior Enrol

Toggle this option to allow customers to register after the close date of an occurrence.

For example:

Disabled (☐)   Enabled (☑)

NOTE: For Enable Prior Enrol to work correctly 'Show all Occurrences' must be enabled and 'Show Close Dates' must be disabled.

See also: Show all Occurrences on page 119 and Show Close Dates on page 127.

Enquiries

Toggle the '**Enable Occurrence Enquire buttons**' setting to include enquire buttons for each individual occurrence.

Disabled (☐)   Enabled (☑)

When clicked, the Enquire button opens the Enquiry Form.

Enquiries sent through this form are viewed from the Enquiries menu option. An email notification of the enquiry will also be sent.

See Also : Enquiries on page 73 regarding managing enquiries.

Toggle the '**Enable enquiries on expired programmes**' setting to display the email enquiry form on courses without any current or future occurrences. This setting requires 'Show all programmes' to be enabled, additionally there needs to be at least one old occurrence published (with a start and end date in the past) for the programme to be listed as an Available Course and subsequently show the enquiry or not.

Disabled (☐)   *Enabled (☑)*

Enquiries submitted for expired programmes are emailed direct to the address specified in General Settings (under Client Details). A record of the message is not stored by VETenrol.

See also: Show all Programmes on page 119.

The '**Push enquiries to VETtrak Waiter**' option will send the details to Web Enrolments in VETtrak, under Waitlist. There the client details can be matched and then the record approved for the Waiter.

Calendar

Show short code instead of programme name adjusts both calendars to replace the full programme names with programme short codes instead. This will reduce clutter in the calendars for training organisations with long programme names.

Occurrences

The settings in this section affect the occurrences displayed when a course is selected on the main screen.

Programme Description

Toggle this option to show or hide the course description retrieved from VETtrak for users browsing courses.

For example:

Disabled (☐)   Enabled (☑ Default)

> **NOTE**: In order for the description to be displayed when enabled, content must also have been entered into the Programme Description in VETtrak.

Occurrence Description

Toggle this option to show or hide the individual descriptions for occurrences retrieved from VETtrak for customers browsing courses.

For example:

<div style="display:flex">

Disabled (☐)

Enabled (☑ Default)

</div>

The setting **Show occurrence description on registration steps** can be enabled to show the occurrence description during the standard registration process. It appears together with the programme name and price.

Show Delivery Mode

Toggle this option to enable or disable the Delivery Mode row for users browsing courses. Delivery mode is retrieved from the VETtrak setting of the same name, and will only display the primary option.

For example:

Disabled (☐)   *Enabled (☑ Default)*

> **NOTE**: If there is no Delivery Mode assigned to the occurrence, the row will not be shown even when the setting is enabled.

Show Classes

Toggle the '**Show list of classes**' option to enable or disable the classes link for customers browsing courses.

Disabled (☐)   *Enabled (☑ Default)*

When enabled, customers can view the list of classes by clicking the link and then hide it by clicking again.

For example:

Toggled Off (default)   *Toggled On*

The '**Show list of classes with Occurrence**' option can be enabled to automatically show the class list, it requires the 'Show list of classes' option to be enabled. '**Show list of classes with Occurrence**' disables the View Classes link, preventing customers from showing and hiding the class list.

Disabled (default)   *Enabled (Default)*

The '**Do not list units on class**' option toggles the display of units that have been assigned to the class in VETtrak. When enabled, this will prevent VETenrol from retrieving units when displaying the Classes list. This option can be particularly useful when dealing with long Classes lists by improving the display time.

Disabled (default)   *Enabled (Default)*

NOTE: Units must be assigned to the classes in VETtrak for them to display by default.

Show Units

Toggle this option to enable or disable the Units link for customers browsing courses.
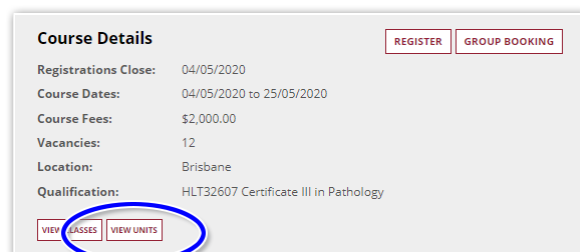
Disabled (☐)   Enabled (☑ Default)

When enabled, clients can view the list of units by clicking the link and then hide it by clicking again.

For example:

Toggled Off (Default)   Toggled On

Show Vacancies

Toggle this option to enable or disable the vacancies row for customers browsing courses.

For example:

Disabled (☐)   Enabled (☑ Default)

Show Close Dates

Toggle this option to show or hide the '**Registrations Close**' date.

For example:

Disabled (☐)   Enabled (☑ Default)

This will also affect the course details displayed during the registration process:

Disabled (☐)   Enabled (☑ Default)

Show Date Range

Toggle this option to show or hide the '**Course Dates**' for occurrences.

For example:

Disabled (☐)   Enabled (☑ Default)

Show Occurrence Code

Toggle this option to show or hide the '**Course Code**' for occurrences.

For example:

Disabled (☐ Default)   Enabled (☑)

Hide Locations

This setting toggles the display of the occurrence location.

For example:

Disabled (☐ default)   Enabled (☑)

This will also affect the course details displayed during the registration process:

Disabled (☐)   Enabled (☑ Default)

Hide Qualifications

This setting toggles the display of the occurrence qualification.

For example:

Disabled (☐ default)   *Enabled (☑)*

Hide Qualification Code for Headings

This setting toggles the display of the programme qualification code in the heading.

For example:

Disabled (☐ default)   *Enabled (☑)*

Show Costs

Toggle this option to show or hide the cost for the occurrence.

For example:

Disabled (☐)   *Enabled (☑ Default)*

> ⓘ **WARNING**: If this option is *disabled*, a payment method will not be requested regardless of which payment preferences have been set.

> ✍ **NOTE**: The 'Course Fees' label is used if there are no price types associated with the occurrence, otherwise it is replaced by the Price Type name. This option is not applicable to occurrences with multiple price types. Refer to the Appendix topic Price Items on page 249 for more information.

Hide Zero Costs

This setting toggles displaying the cost for occurrences with a zero dollar value cost.

For example:

Disabled (☐ default)   Enabled (☑)

> ✍ **NOTE**: This setting is only applicable if 'Show Costs' is enabled.

Schedule Settings

The settings in this section affect the way occurrences are displayed for the Schedule page, an alternative to the courses main screen.

Show Price Type

Toggle this option to enable or disable the Price Type column for users browsing courses on the Schedule page.

For example:

Disabled (☐)   *Enabled (☑ Default)*

> **NOTE**: If there is no Price Type assigned to the occurrence, the row for the occurrence may display out of alignment with the rest of the list.

Hide Location

Toggle this option to enable or disable the Location column for users browsing courses on the Schedule page.

For example:

Disabled (☐)   *Enabled (☑ Default)*

Hide Cost

Toggle this option to enable or disable the Cost column for users browsing courses on the Schedule page.

For example:

Disabled (☐)   *Enabled (☑ Default)*

Hide Vacancies

Toggle this option to enable or disable the Vacancies column for users browsing courses on the Schedule page.

For example:

Disabled (☐)   *Enabled (☑ Default)*

Miscellaneous

This section contains other preferences for the registration process.

Add Student To

This option allows organisations to specify how the registration should be handled when it comes to enrolling the student. By default, a student will be enrolled in all classes of the occurrence for which they have registered.

In some situations, for example an organisation with a single occurrence for each of their programmes into which students enrol throughout the year, the default method can enrol students in classes that have occurred in past.

Set this option to best fit the way occurrences are being utilised in your organisation.

> **NOTE**: In order for this setting to work correctly there must be future classes scheduled, otherwise the default behaviour applies (enrol in all classes).

> NOTE: This setting also impacts the class list (if enabled) and will show only the class(es) into which the user will be enrolled if they register.

Courses Link

Enter a URL here to control the destination of the Courses breadcrumb link. The default is for this to return to the Welcome page as described by .

> NOTE: Relevant only if *Show Breadcrumbs* is enabled.

Auto-process

The **Auto-process web reservations** setting will permit registrations to be automatically processed out of Web Enrolments in VETtrak, so that staff members do not need to review and manually process these enrolments. This will only apply for occurrences where the option to process automatically has also be set in VETtrak.

Do not update matched client details will keep the existing client details in VETtrak when client matching auto-processed registrations.

Frameset Embedded

Enable this option to indicate your website is linking to VETenrol using an iFrame or similar frame element. This is an important distinction for VETenrol to ensure cross-platform browser compatibility.
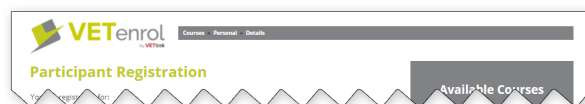
Show Breadcrumbs

Toggle this option to enable or disable the breadcrumb style navigation displayed at each step of the registration process.

For example:

Disabled (☐)   Enabled (☑ default)

Input Masking

Toggle this option to hide or show the masking effect for mobile and email address fields in the registration process.

For example:

Disabled (☐ default)   Enabled (☑)

> NOTE: The mask shows when the field has focus (Mobile field in the screenshot), or while the mouse is hovering over a field. The email fields are all displayed in the hover state for the purpose of the screenshot.

Google Maps API Key

Enter your Google Maps API Key to enable the Location fields for addresses for your customers. This will permit users to begin typing their address and have Google Maps match it to known locations. A selected location will then pre-fill the address fields with the selection.

For example:

Disabled (☐ default)   *Enabled (☑)*

How it works (when enabled):

Type in the location field, then click the correct address.   *The fields are pre-filled based on the selection.*

Obtain your Google Maps API Key here:
https://developers.google.com/maps/documentation/javascript/get-api-key
It is called a Google Maps Geocoding API and you will need a Google Account.
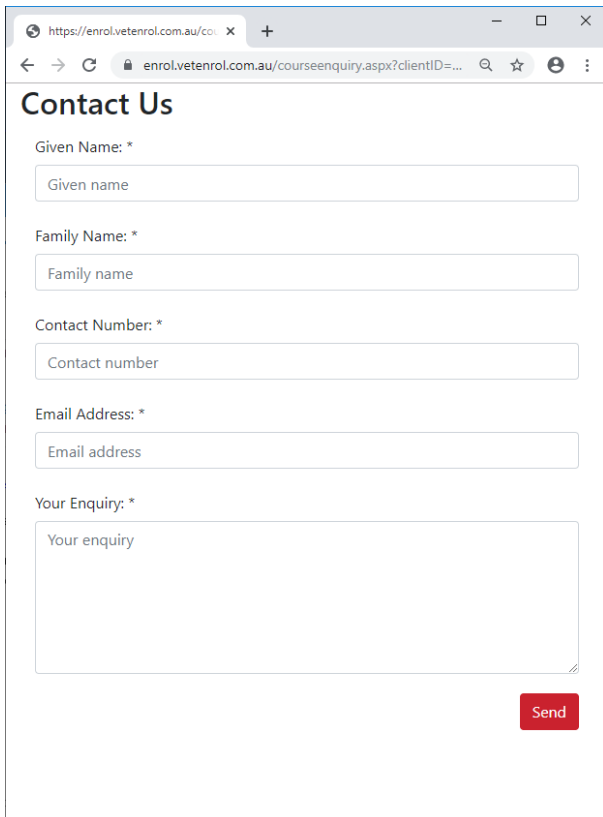
ReCaptcha Keys

Enter your Google reCAPTCHA Site and Secret Keys to enable reCAPTCHA for your VETenrol enquiry forms and protect against spam.

ReCAPTCHA does not work with enquiries on expired programmes, however it will be applied to:
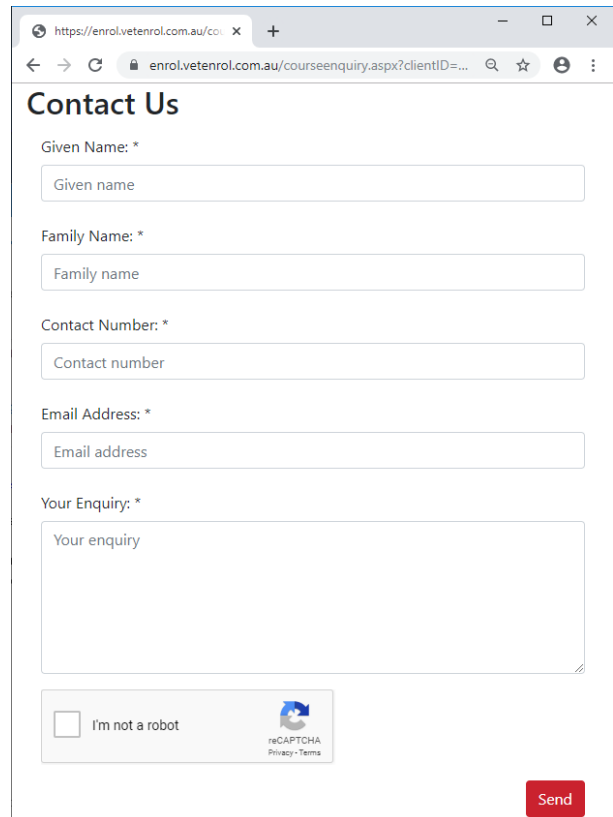
- Occurrence Enquiries (enquiry.aspx)
- Course Enquiry Widget (courseenquiry.aspx)

How it works (when valid keys are entered):

reCAPTCHA not in use   *reCAPTCHA in use*

Obtain more information on Google reCAPTCHA here:
https://www.google.com/recaptcha/

Headings and Text

These fields allow the default headings used on the main screen and during the registration process to be changed.

Main screen - course not selected
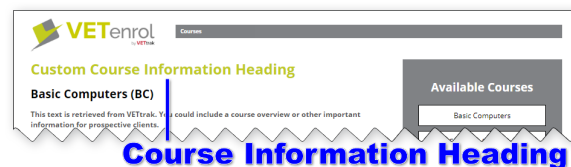
Main screen - course selected

Registration screens

See also: HTML Code on page 253 regarding customising the Welcome text.

Save For Later

Toggle the option to enable or disable the Save for Later feature. The Save for Support feature requires Save for Later to be enabled.

- The '**Subject**' field allows you to specify a custom subject line for the email sent to users. A default subject line will be used if this field is blank.
- The '**Body**' field controls the body text in the email. The default will be used if this is blank. Additionally, you can insert the default message for you make alterations by clicking the **Default** button.

— The edit icon beneath the Body field label will open a html editor for previewing and editing the text.

- The '**Support Message**' field controls the on-screen support message. The default will be used if this is blank. This field will remain disabled until the '**Enable Save for Support**' option is ticked.

    — The edit icon beneath the Body field label will open a html editor for previewing and editing the text.

Save for Later enables students to return to the registration process at a later time (via an emailed link) while retaining their progress. A 'Save for later' button is displayed at the bottom of the page during the registration process for users to activate the feature.

Save for Support offers users a chance to request help from the Training Organisation, and is based on Save for Later, with the addition of the organisation receiving a message from the user containing their request.

For example:

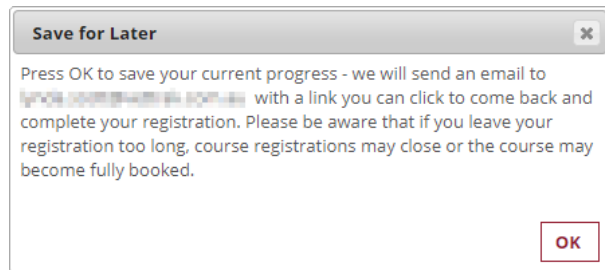*Save For Later enabled (☑)*   *Save For Later and Save For Support enabled (☑)*
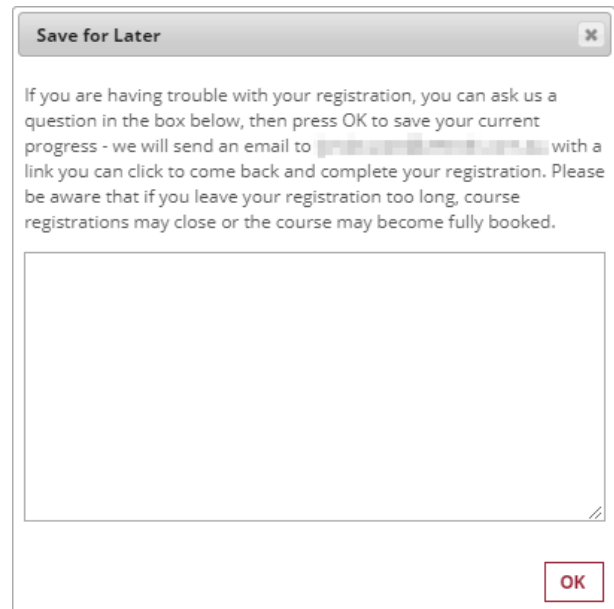
NOTE: Save For Later will only display if at least one optional registration step is enabled.

How it works:

- User clicks the Save For Later (or Need Help) button.

ABOVE: *Default Save For Later message, displayed when the user clicks the Need Help button during the registration process.*

RIGHT: *The Default Save For Support message, displayed when the user clicks the Need Help button during the registration process.*
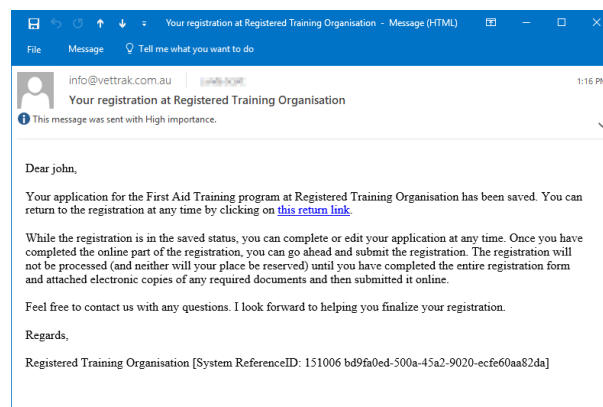
- User clicks OK to proceed and the email is sent by VETenrol.
- User closes their browser.

In the case of a Save for Support request:

- RTO receives an email notification of a support request from the user.
- RTO contacts the user to address their issues.

When the user is ready to resume their registration:

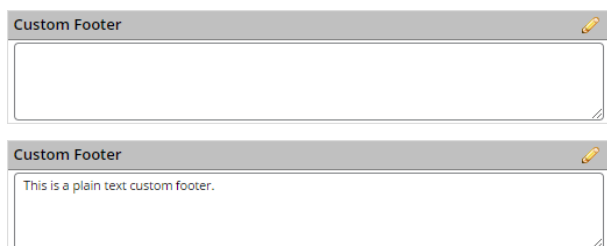- User opens their email program and views the message received.

- User clicks the return link.
- The browser opens to the VETenrol site, showing the step where it was saved.
- The user continues with their registration and may choose to Save for Later again.

See also: Registration Steps on page 158 for details on the optional registration steps.

Custom Footer
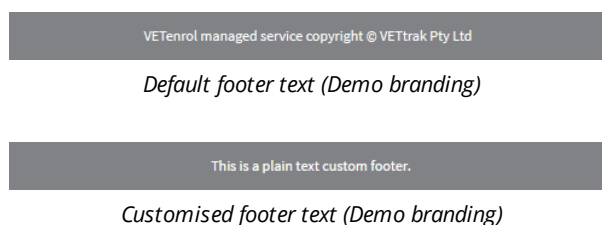
This field allows the default footer text to be overridden with the field contents. Plain text or HTML is accepted.

Default footer text (Demo branding)

Customised footer text (Demo branding)

Registration Settings

These settings alter the steps in the registration process.

REGISTRATION SETTINGS

Mandatory Registration Steps

Personal Step: ☐ Enable Returning Participant feature?
☐ Allow "Easy" returning participant?
☐ Disable option for single name?
☐ Collect Preferred Name?
☐ Collect Former Family Name?
☐ Enable international addresses?
☐ Disable collection of title?
☐ Disable collection of gender?
☐ Force collection of gender?
☐ Collect External Code?

Details Step: ☐ Force known suburbs in addresses?
☐ Hide Postal Address entry?
☐ Hide Home Number entry?
☐ Hide Work Number entry?
☐ Hide Mobile Number entry?
☐ Hide Fax Number entry?
☐ Force collection of Emergency Contact details?
☐ Hide Emergency Contact entry?
☐ Hide Citizenship entry?
☐ Enable Preferred Contact Method?
☐ Do not force collection of email address?
☐ Force email confirmation?
☐ Collect secondary email address?

Confirm Step: ☐ Enable Referral Source Step?
☐ Force Collection of Referral Source?
☐ Hide Special Needs entry?
☐ Disable Terms & Conditions
☐ Disable need to accept terms & conditions?
☐ Enable signature pad?
☐ Show study reason on confirm step?

Sundry File Uploads [Off ▾]

Group Bookings

Places Step: ☐ Force collection of placement details?
☐ Collect home phone number?
☐ Force collection of home phone number?
☐ Collect mobile phone number?
☐ Force collection of mobile phone number?
☐ Collect email address?
☐ Force collection of email address?
☐ Collect USI?
☐ Force collection of USI?
☐ Allow CSV upload?

Confirmation Page

Redirect URL: [https://www.vettrak.com.au/]
Auto Redirect: ☐ Automatically redirect to URL on completion?

Registration Steps

USI Step: ☑ Require USI?
☐ Force option for RTO to create USI?
☐ Disable option for RTO to create USI?
☐ Force collection of USI?

VET Student Loans Step: ☐ Require VET Student Loans?
☐ Do not show Skip button?
☐ Force collection of Y12 question?

Identity Step: ☐ Require identity check?
☐ Ask nationality question?
☐ Force collection of nationality?
☐ Require upload of identity document?
☐ Skip asylum seeker question?
☐ Skip visa question?
☐ Skip prisoner status question?
☐ Skip guardianship of the Minister question?

Employer Step: ☐ Require employer details?
☐ Force collection of employer details?
☐ Enable VETtrak employers auto-complete?
☐ Only allow registered employers?
☐ Disable ABN question?
☐ Disable employer contact question?
☐ Enable positions?
☐ Allow free-form positions?
☐ Disable Payroll ID question?
☐ Force collection of Payroll ID?

Concessions Step: ☐ Enable concession step?
☐ Disable CentreLink details?
☐ Enable upload of Centrelink payment evidence?
☐ Disable concessions?
☐ Require jobactive provider details?
☐ Require Initiatives?
☐ Require Overseas Fee Paying Student Question?

Student Numbers: ☐ Require Vic Student Number?
☐ Collect VSN for all registrations?
☐ Require WorkReady?
☐ Require Learning Unique identifier?

Skills First Program Step: ☐ Require Vic Skills First Program Declaration?
☐ Do not show Skip button?

NSW Smart & Skilled Step: ☐ Require NSW Smart & Skilled Declaration?
☐ Do not show Skip button?

Working with Children: ☐ Require Working With Children details?

☐ ACT   ☐ QLD   ☐ VIC
☐ NSW   ☐ SA   ☐ WA
☐ NT   ☐ TAS

AVETMISS Step: ☑ Require AVETMISS data?
☐ Only show AVETMISS on occurrences with qualification?
☐ Force collection of Country of Birth?
☐ Collect Town of Birth?
☐ Force Collection of Town of Birth?
☐ Force collection of Language Spoken?
☐ Collect English Proficiency?
☑ Disable forced collection of Indigenous Status?
☐ Force collection of highest school level?
☑ Disable forced collection of Year Completed?
☐ Force collection of secondary school status?
☐ Disable collection of Prior Qual Name & Year?
☐ Disable collection of Prior Education Recognition?
☐ Force collection of Prior Education Recognition?
☐ Hide AVETMISS file upload?
☐ Require AVETMISS file upload?
☐ Force collection of Study Reason?
☐ Force collection of Employment Status?
☐ Force collection of length of employment?
☐ Collect length of unemployment?

RPL Step ☐ Require RPL Step?

[Save]

See also: The user Experience on page 28 for more information regarding the registration process.

Mandatory Registration Steps

These settings control features for the required steps in the registration process.

Personal Step

The following settings apply to the first step of the registration process. The step is discussed in the topic: .

Enable Returning Participant feature

Toggle this option to enable or disable the student login feature. By logging in, a customer's details are retrieved from VETtrak pre-filling the registration where details are available.

For example:

Disabled (☐ defailt)   *Enabled (☑)*

Allow "Easy" returning participant

Toggle this option to allow the entry of a participant ID in place of User name and Password. The 'Enable Returning Participant feature' setting must be enabled to use this option.

For example:

Disabled (☐)   *Enabled (☑ default)*

> **NOTE**: This option is less secure. Please consider security and privacy risks before choosing to enable this feature.

Disable option for single name

Toggle this option to exclude or include the single name checkbox.

For example:

<div style="display:flex; justify-content: space-between;">
Disabled (☐)   Enabled (☑ default)
</div>

Collect Preferred Name

Toggle this option to enable or disable the Preferred Name field.

For example:

<div style="display:flex; justify-content: space-between;">
Disabled (☐ default)   Enabled (☑)
</div>

Collect Former Family Name

Toggle this option to enable or disable the Former Family Name field.

For example:

Disabled (☐ default)   Enabled (☑)

Enable international addresses

Toggle this option to enable accepting overseas registrations. The option will enable the choice of registering from within Australia or from Overseas at the Personal step. In the case of selecting Overseas, the Details step will allow entry of an international address.

For example:

Enabled (☑)

Disable Collection of title

Toggle this option to show or hide the Title field.

For example:

Disabled (☐ default)   Enabled (☑)

Disable collection of gender

Toggle this option to show or hide the Gender field.

For example:

Disabled (☐ default)   Enabled (☑)

Force collection of gender

Toggle this option to make the Gender field mandatory or optional.

For example:

Disabled (☐ default)	Enabled (☑)

Collect External Code

Toggle this option to show or hide the External Code section. If enabled, the code collected here will be stored in VETtrak's external code field.

For example:

Disabled (☐ default)	Enabled (☑)

Details Step

These settings apply to the step where customers provide their contact information. The Details step is discussed in the topic: .

Force known suburbs in addresses

VETenrol offers an auto-complete feature for addresses which is activated when a customer begins entering their suburb/city. The feature displays a list of matches based on what the customer types and if a selection is made, the City, State, and Post Code is completed as per the selection.

The '**Force known suburbs in addresses**' option prevents customers from entering data that does not appear on the auto-complete list.

For example:

Disabled (☐ default)   *Enabled (☑)*

Hide Postal Address

Toggle this option to enable or disable the Postal Address section on the Details step.

For example:

Disabled (☐ default)　　　　　　　　　　　　　　　　Enabled (☑)

Hide Home Number entry

Toggle this option to hide/show the Home Phone Number field for the Details step.

For example:

Disabled (☐ default)　　　　　　　　　　　　　　　　Enabled (☑)

Hide Work Number entry

Toggle this option to hide/show the Work Phone Number field for the Details step.

For example:

Disabled (☐ default)   Enabled (☑)

Hide Mobile Number entry

Toggle this option to hide/show the Mobile Phone Number field for the Details step.

For example:

Disabled (☐ default)   Enabled (☑)

Hide Fax Number

Toggle this option to hide/show the Fax Number in the Contact Details section of the Details step.
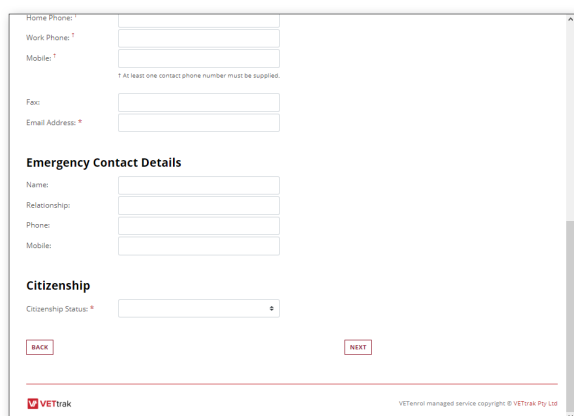
For example:

Disabled (☐ default)   Enabled (☑)

Hide Emergency Contact
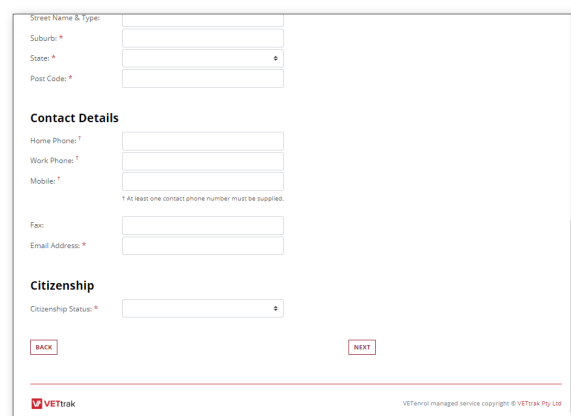
Toggle this option to enable or disable the Emergency Contact Details section at the Details step.

For example:
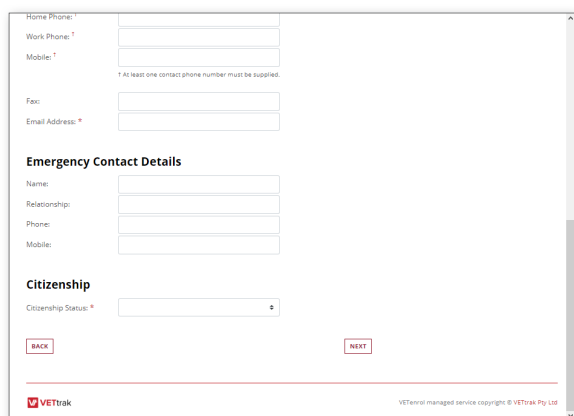
Disabled (☐ default)   *Enabled (☑)*

Hide Citizenship
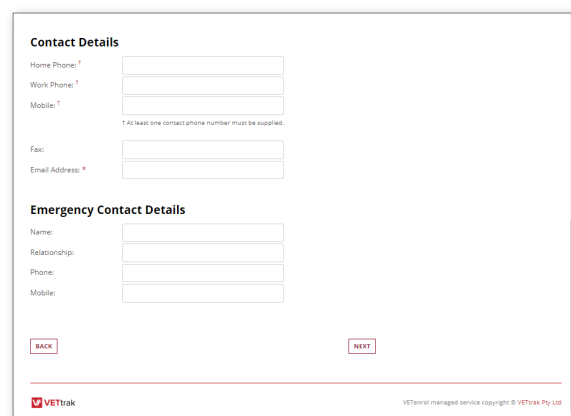
Toggle this option to enable or disable the Citizenship section on the Details step.

For example:

Disabled (☐ default)   *Enabled (☑)*

Enable Preferred Contact Method

Toggle this option to enable or disable the Preferred Contact Method drop-down menu in the Contact Details section at the Details step.

For example:

Disabled (☐ default)   *Enabled (☑)*

Do not force collection of email address

Toggle this option to enable or disable the mandatory collection of an email address as part of the Contact Details. An email address must be provided by default (not necessarily valid), however if this option is enabled the field will not be required and the user can proceed to the next step without completing it.

> *ⓘ* If an email address is not provided, the automated confirmation email cannot be sent.

Force email confirmation

Toggle this option to enable or disable the field for users to re-type their email address to confirm it is correct.

For example:

Disabled (☐ default)   *Enabled (☑)*

Collect secondary email address

Toggle this option to enable or disable the Citizenship section on the Details step.

For example:

| Disabled (☐) | Enabled (☑ default) |

Confirm Step

These settings apply to the step where customers confirm their registration. The step is described in the topic: Confirm Registration on page 40.

Referral Source Step

When it is enabled (☑) the '**Enable Referral Source Step**' checkbox adds the question 'How did you hear about us?' to the Terms & Conditions step. If the checkbox is disabled (☐) the question is not shown.

The '**Force Collection of Referral Source**' checkbox makes it mandatory to select an answer to the question 'How did you hear about us?' when it is enabled (☑). The referral source can be left blank if this checkbox is disabled (☐).

'Enable Referral Source Step' disabled ( )   *'Enable Referral Source Step' enabled (✔)*

Hide Special Needs

Toggle this option to enable or disable the Special Requirements / Needs section at the Confirm step.

Disabled (default)   *Enabled (✔)*

Disable Terms & Conditions

Toggle this option to enable or disable the Terms & Conditions section of the Confirm step.

Disabled (☐ default)   Enabled (☑)

Disable need to accept terms & conditions

Toggle this option to remove the acceptance checkbox for Terms & Conditions.

Disabled (☐ default)   Enabled (☑)

Enable signature pad

Toggle this option to enable or disable the signature pad section at the Terms & Conditions step. This will enable students to sign their name in the space provided using their mouse.

For example:

Disabled (☐ default)   Enabled (☑)

Show study reason on confirm step

Toggle this option to enable or disable the *Study Reason* question at this step.

Disabled (☐ default)   Enabled (☑)

> **NOTE**: This is intended for use with Client Data Completions, but can also be useful when none of the other AVETMISS step questions are needed.

Sundry file uploads

Select the number of file upload fields to include in the sundry file upload section at the Terms & Conditions step. If the setting is Off the section will not be displayed.

For example:

Setting OFF (default)   Setting 1

If any files are uploaded, Registration Details will include an additional section titled Sundry Upload where the file(s) will be listed. Clicking the filename will download the file.

Registration Steps

These settings enable specific steps in the registration process and in some cases features for those steps. The steps enabled here are global for all registrations, but can be overridden based on Programme Type.

Registration Steps

USI Step:	☑ Require USI?
	☐ Force option for RTO to create USI?
	☐ Disable option for RTO to create USI?
	☐ Force collection of USI?
VET Student Loans Step:	☐ Require VET Student Loans?
	☐ Do not show Skip button?
	☐ Force collection of Y12 question?
Identity Step:	☐ Require identity check?
	☐ Ask nationality question?
	☐ Force collection of nationality?
	☐ Require upload of identity document?
	☐ Skip asylum seeker question?
	☐ Skip visa question?
	☐ Skip prisoner status question?
	☐ Skip guardianship of the Minister question?
Employer Step:	☐ Require employer details?
	☐ Force collection of employer details?
	☐ Enable VETtrak employers auto-complete?
	☐ Only allow registered employers?
	☐ Disable ABN question?
	☐ Disable employer contact question?
	☐ Enable positions?
	☐ Allow free-form positions?
	☐ Disable Payroll ID question?
	☐ Force collection of Payroll ID?
Concessions Step:	☐ Enable concession step?
	☐ Disable CentreLink details?
	☐ Enable upload of Centrelink payment evidence?
	☐ Disable concessions?
	☐ Require jobactive provider details?
	☐ Require Initiatives?
	☐ Require Overseas Fee Paying Student Question?
Student Numbers:	☐ Require Vic Student Number?
	☐ Collect VSN for all registrations?
	☐ Require WorkReady?
	☐ Require Learning Unique identifier?
Skills First Program Step:	☐ Require Vic Skills First Program Declaration?
	☐ Do not show Skip button?
NSW Smart & Skilled Step:	☐ Require NSW Smart & Skilled Declaration?
	☐ Do not show Skip button?
Working with Children:	☐ Require Working With Children details?

☐ ACT	☐ QLD	☐ VIC
☐ NSW	☐ SA	☐ WA
☐ NT	☐ TAS	

AVETMISS Step:	☑ Require AVETMISS data?
	☐ Only show AVETMISS on occurrences with qualification?
	☐ Force collection of Country of Birth?
	☐ Collect Town of Birth?
	☐ Force Collection of Town of Birth?
	☐ Force collection of Language Spoken?
	☐ Collect English Proficiency?
	☑ Disable forced collection of Indigenous Status?
	☐ Force collection of highest school level?
	☑ Disable forced collection of Year Completed?
	☐ Force collection of secondary school status?
	☐ Disable collection of Prior Qual Name & Year?
	☐ Disable collection of Prior Education Recognition?
	☐ Force collection of Prior Education Recognition?
	☐ Hide AVETMISS file upload?
	☐ Require AVETMISS file upload?
	☐ Force collection of Study Reason?
	☐ Force collection of Employment Status?
	☐ Force collection of length of employment?
	☐ Collect length of unemployment?
RPL Step	☐ Require RPL Step?

USI Step

The '**Require USI**' checkbox activates the USI Step in the registration process when it is enabled (☑). The step is skipped if the checkbox is disabled (☐).

The USI step requests the customer to provide their Unique Student Identifier and offers to apply for a USI on the customer's behalf if they do not have one.

The '**Force option for RTO to Create USI**' checkbox can be enabled to remove the *No* choice for the question 'Would you like us to create a USI for you'.

The '**Disable option for RTO to Create USI**' checkbox can be enabled to prevent the question 'Would you like us to create a USI for you' from being asked.

The '**Enable default SHORT USI code**' checkbox can be enabled to allow users to choose not to provide a USI, even if collection is forced, when they register for a short course. '**Disable option for RTO to Create USI**' must be enabled to use this option.

NOTE: The occurrence must start and end on the same day to be recognised as a short course.

If '**Disable option for RTO to create USI**' is enabled, the '**Force collection of USI**' checkbox can then be toggled to prevent users from proceeding with the registration without supplying their USI (as depicted in the screenshot to the left).

NOTE: The Unique Student Identifier field will accept the exemption code "INDIV" for individual exemptions. Individual exemptions are rare, thus they are not mentioned to prevent ineligible students from entering the code simply to bypass the step.

VET Student Loans

The '**Require VET Student Loans**' checkbox activates the VET Student Loans Step in the registration process when it is enabled (☑). The step is skipped if the checkbox is disabled (☐).

The VET Student Loans step facilitates applying for VET Student Loans should the customer wish to do so.

The option '**Do not show Skip button**', if enabled, will remove the button labelled *I do not wish to apply* that allows users to bypass the step.

The '**Force collection of Y12 question**' checkbox, if enabled, will make mandatory the questions '*In which state did you attend year 12*?', and '*In which year did you complete year 12*?'. Otherwise, the questions are still asked but answers are not required.

> The third Y12 question, '**Name of school where you completed year 12**', is not affected by the '**Force collection of Y12 question**' option and will not be made mandatory.

Identity Step

The '**Require identity check?**' checkbox activates the Identity Step in the registration process when it is enabled (☑). The step is skipped if the checkbox is disabled (☐).

The Identity Step poses a series of questions regarding identity and includes the option to upload scanned copies of identification documents.

All of the default questions are mandatory, however the '**Ask nationality question**' can be enabled (☑) to include this question at the step and answering it is not mandatory, unless the option '**Force collection of nationality**' is also enabled (☑). Additionally uploading copies of identification is not required but the '**Require upload of identity document**' checkbox can be enabled (☑) to make uploading a file mandatory too.

> **NOTE**: While the upload of a file can be made mandatory, the file contents cannot be verified as being legitimate. Staff members will need to manually check the file to ensure the customer has uploaded a scan of their identification and not just any file to complete the step. Staff members should be aware that customers could upload inappropriate/sensitive material or potentially harmful files (either intentionally or inadvertently) and should not open files with unknown file extensions. Opening files attached to registrations that are appear fake is strongly discouraged.

The '**Skip asylum seeker question**', '**Skip visa question**', '**Skip prisoner status question**', and '**Skip guardianship of the minister question**' checkboxes can be enabled (☑) to prevent the respective questions from being asked at the step.

Identity step (default)   Identity step (all enabled)

NOTE: Enabling this step removes the default Citizenship Status question appearing at the Contact Details step.

Employer Step

The '**Require Employer Details**' checkbox activates the Employer step in the registration process when it is enabled (☑). The step is skipped if the checkbox is disabled (☐).

The '**Force collection of employer details**' checkbox makes completing the Employer Step mandatory when it is enabled (☑).

'Force collection of employer details' disabled (☐)   *'Force collection of employer details' enabled (☑)*

When ticked (☑), the '**Enable VETtrak employers auto-complete**' checkbox will set the Business Name field to search all Employers in VETtrak when acustomer begins typing a business name. The customer can select the employer from the drop-down list of search results. If this checkbox is disabled (☐) customers must manually type the information.

> ℹ The employer's record in VETtrak must include the State in the Address section.

The '**Only allow registered employers**' checkbox limits the Business Name field to a drop-down menu of preset Employers and pre-fills the other fields when the customer selects one. If this checkbox is disabled (☐) customers must manually type the information.

'Only allow registered employers' disabled (☐)   *'Only allow registered employers' enabled (☑)*

The '**Disable ABN question**' checkbox can be enabled (☑) to remove the ABN field.

'Disable ABN question' disabled (☐)   'Disable ABN question' enabled (☑)

The '**Disable employer contact**' checkbox can be enabled (☑) to remove the Contact Name field.

'Disable employer contact question' disabled (☐)   'Disable employer contact question' enabled (☑)

The '**Enable Positions**' checkbox can be enabled to include the Position drop-down menu as part of the employer information collected.

The positions listed are obtained from VETtrak (Configuration > Positions).

The '**Allow free-form positions**' checkbox requires customers manually type their position, rather than select from the pre-populated list.

The '**Disable Payroll ID**' checkbox can be enabled (☑) to remove the Payroll ID field.

'Disable Payroll ID question' disabled (☐)   *'Disable Payroll ID question' enabled (☑)*

The Employer Step is not mandatory, although there are required fields if the customer indicates they are employed. The '**Require Payroll ID**' checkbox can be enabled (☑) to make the Payroll ID field mandatory as this field is not required by default.

> **See also**: Employers on page 203 regarding managing the employers listed in the drop-down menu.

Require Concession

The '**Enable concession step**' checkbox activates the Concessions Step in the registration process when it is enabled (☑). The step is skipped if the checkbox is disabled (☐).

The Concessions step requests details regarding concessions, including government allowances. There are no mandatory questions, although some answers mandate further explanation.

The '**Disable CentreLink details**' checkbox removes the Centrelink Allowances section from the step. If this checkbox is enabled (☑) the section is not displayed.

Disable CentreLink details disabled (☐)

Disable CentreLink details enabled (☑)

The '**Disable concessions**' checkbox removes the Concessions section from the step. If this checkbox is enabled (☑) the section is not displayed.

Disable concessions disabled (☐)

Disable concessions enabled (☑)

The '**Require jobactive provider details**' checkbox expands the Concession step to request Jobactive provider job seeker details. If this checkbox is disabled (☐) the section is not displayed.

JSA disabled (☐)   *JSA enabled (☑)*

The '**Require Initiatives**' checkbox expands the Concession step to include a section on initiatives for which the student may be eligible. The initiatives are state based, determined by the occurrence location. If this checkbox is disabled (☐) the section is not displayed.

Initiatives disabled (☐)   *Initiatives enabled (☑)*

The '**Require Overseas Fee Paying Student Question**' checkbox expands the Concession step to include a section on overseas students. If this checkbox is disabled (☐) the section is not displayed.

Overseas Fee Paying Student disabled (☐)   *Overseas Fee Paying Student enabled (☑)*

Student Numbers

When it is enabled (☑) the '**Require Vic Student Number**' checkbox activates the Student Number step in the registration process for residents of Victoria. If the checkbox is disabled (☐) or a state other than Victoria was chosen at the contact details step, the step is skipped.

VSN enabled (☑) and Victorian resident under 25.

VSN enabled (☑) and Victorian resident 25+.

VSN requires the customer to provide their student number or complete the questions if they are under 25, and acknowledge the Victorian Government VET Student Enrolment Privacy Notice.

The '**Collect VSN for all registrations**' option becomes available when '**Require Vic Student Number**' is enabled . The '**Collect VSN for all registrations**' option can be enabled (☑) to enforce the VSN step regardless of the state selected.

The '**Require WorkReady**' checkbox activates the Student Number step in the registration process for residents of South Australia when it is enabled (☑). The step is skipped if the checkbox is disabled (☐), or if a state other than South Australia was chosen at the contact details step.

WorkReady requires the customer to provide their student number or complete the questions, then acknowledge a specialised declaration by ticking a checkbox.

WorkReady enabled (☑) and South Australian resident.

If it is enabled, the '**Require Learning Unique Identifier**' checkbox activates the Student Number step in the registration process for residents of Queensland under 18 years of age. The step is skipped if the checkbox is disabled (☐), if a state other than Queensland was chosen at the contact details step.

The Learning Unique Identifier is requested, but the field is not mandatory and can be left blank.

Learning Unique Identifier enabled (☑) and Queensland resident.

Skills First Program Step

The '**Require Vic Skills First Program Declaration**' checkbox activates the SFP Step in the registration process when it is enabled (☑). The step is skipped if the checkbox is disabled (☐).

The SFP step facilitates the customer's application for the Victorian Skills First Program should they wish to apply.

The option '**Do not show Skip button**', if enabled, will remove the button labelled *I do not wish to apply* that allows users to quickly bypass the step.

NSW Smart & Skilled Step

The '**Require NSW Smart & Skilled Declaration**' checkbox activates the S&S Step in the registration process when it is enabled (☑). The step is skipped if the checkbox is disabled (☐).

In addition to the step needing to be enabled, customers will only see the step if the occurrence they are registering for has a NSW location and they've entered a NSW residential address for either home or work.

The S&S step facilitates the customer's application for NSW Smart & Skilled should they wish to apply.

The option '**Do not show Skip button**', if enabled, will remove the button labelled *I do not wish to apply* that allows users to quickly bypass the step.

Working with Children

This option enables the Working With Children step in the registration process.

In addition to enabling (☑) the '**Require Working With Children details**' checkbox, each applicable state needs to be enabled (☑) and the customer must specify one of the enabled state(s) as part of their residential address at the Contact Details step for the Working with Children step to be included in the registration process. If the '**Require Working With Children details**' checkbox is disabled (☐) the step is skipped.

> **NOTE**: If **Enable International Addresses** is ticked, and a user indicates they are *registering from overseas*, the occurrence location will be used to determine if the WWC step will be included in the registration process.

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The Working with Children step is mandatory and a valid card or an application lodgement number must be supplied before proceeding to the next step.

> **See also**: Agreements on page 201 regarding modifying the introductory text displayed at this step and Personal Step on page 143 regarding enabling international addresses.

AVETMISS Step

When it is enabled (☑) the '**Require AVETMISS data**' checkbox activates the Collection step in the registration process. If the checkbox is disabled (☐) the step is skipped.

This step obtains information necessary for the Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS).

The '**Force collection of Country of Birth**' checkbox will make the question "*In which country were you born*" mandatory, if it is enabled.

The '**Collect Town of Birth**' checkbox can be enabled to include the *Town of Birth* field as part of the information collected, the question can then be made mandatory using the '**Force collection of Town of Birth**' option.

The '**Force collection of Language Spoken**' checkbox makes mandatory the question "*Do you speak a language other than English at home?*".

'**Collect English proficiency**', when enabled (☑), will include a question regarding how well the participant speaks English. This question was previously required nationally, but is now only relevant for Western Australia.

The '**Only show AVETMISS on occurrences with qualification**' checkbox limits the AVETMISS step to be only included in registrations for occurrences with a qualification set within VETtrak when it is enabled (☑). The step is displayed for all programmes and occurrences if the checkbox is disabled (☐).

The '**Disable forced collection of Indigenous Status**' checkbox makes the question "*Are you of Aboriginal or Torres Strait Islander origin*" optional.

The '**Disable forced collection of Year Completed**' checkbox makes the question "*In which year did you complete that school level*" optional.

The '**Force collection of secondary school status**' checkbox makes mandatory the question "*Are you still enrolled in secondary or senior secondary education?*".

The '**Disable collection of Prior Qual Name & Year**' checkbox toggles the '*Qualification Name*' and '*Year Completed*' columns for the Prior Education section.

Disable Prior Qual Name & Year disabled (☐)

Disable Prior Qual Name & Year enabled (☑)

The '**Disable collection of Prior Education Recognition**' checkbox toggles the '*Recognition*' column for the Prior Education section.

Disable Prior Education Recognition disabled (☐)

Disable Prior Education Recognition enabled (☑)

The '**Force collection of Prior Education Recognition**' checkbox makes selecting a Recognition mandatory for any ticked prior education item. This option is unavailable if '**Disable collection of Prior Education Recognition**' is ticked.

'**Hide AVETMISS file upload**', if enabled, will remove the optional file upload provided at the AVETMISS step for uploading prior education evidence.

Hide AVETMISS file upload disabled (☐)

Hide AVETMISS file upload enabled (☑)

'**Require AVETMISS file upload**' will make the file upload mandatory if the user indicates they have prior education. This option cannot be enabled if 'Hide AVETMISS file upload' is enabled.

The '**Force collection of Study Reason**' checkbox makes mandatory the question "*Of the following categories, which best describes your main reason for undertaking this course/traineeship/apprenticeship?*".

The '**Force collection of Employment Status**' checkbox makes mandatory the question "*Of the following categories, which BEST describes your current employment status?*".

The '**Force collection of length of employment**' checkbox makes mandatory the question "*How long have you worked with this employer?*", which is displayed if the employment status is set to either *Full time employee* or *Part time employee*.

The '**Collect length of unemployment**' checkbox enables the question "*Are you short-term or long-term (more than 52 weeks) unemployed?*". The question is only displayed in the case of the customer selecting either 'Unemployed - seeking full time work', or 'Unemployed - seeking part time work' in response to the employment status question.

RPL Step

The '**Require RPL Step**' checkbox activates the Recognition of Prior Learning / Credit Transfer Step in the registration process when it is enabled (✅). The step is skipped if the checkbox is disabled (☐).

The RPL step facilitates the customer's application for RPL / CT by collecting:

1. *Units of competency* for RPL/RCC, and/or Credit Transfer.
2. An optional *file upload* for supporting evidence, and
3. Comments regarding *relevant industry experience*.

Customer View: System Default for RPL Introduction

Customer View: System Default for RPL Doc Verification

See also: RPL Introduction & Doc Verification on page 196 regarding the customisation of text displayed at this step.

Group Bookings

The following settings apply to the registration process for group bookings.

Places Step

The following settings affect the places step of a group booking. The steps are discussed in the topic: Group Bookings on page 43.

Force collection of placement details?

Toggle this option to enable or disable the mandatory collection of participant details at the Places step of group bookings.

NOTE: This option should *not* be enabled if you want to allow users to upload a CSV containing participant details.

Collect home phone number?

Toggle this option to enable or disable the Home Phone field at the Places step of group bookings. Completing the field is not mandatory, unless the **Force collection of home phone number** option is also enabled.

Collect mobile phone number?

Toggle this option to enable or disable the Mobile field at the Places step of group bookings. Completing the field is not mandatory, unless the **Force collection of mobile phone number** option is also enabled.

Collect email address?

Toggle this option to enable or disable the Email Address field at the Places step of group bookings. Completing the field is not mandatory, unless the **Force collection of email address** option is also enabled.

Collect USI?

Toggle this option to enable or disable the USI field at the Places step of group bookings. Completing the field is not mandatory, unless the **Force collection of USI** option is also enabled.

Allow CSV Upload?

Toggle this option to enable users to supply a CSV file that contains the participant details instead of completing the Places step. CSV or Comma Separated Values is a common file format supported by most spreadsheet software.

> ⓘ   If this option is enabled, the option *Force collection of placement details* should not be.

> 📝   **NOTE**: Validation cannot be applied to the uploaded file. Similarly, none of the Places step options affect or can be enforced for uploaded CSV files.

Confirmation Page

The following settings apply to the end of the registration process.

Redirect URL

This is website to which users will be directed if they click the Close button for their Registration Confirmation.

> ⓘ If you have logo linking enabled (part of branding), this address is also used as the link behind the main logo for your VETenrol.

Auto Redirect

This option will bypass the Registration Confirmation (receipt page), and take users straight to the address provided in the Redirect URL.

Data Completion Settings

These settings apply to the short course registration which alters the default registration process.

Introduction Text

Control the **Heading** and body **Text** for starting/resuming a short course registration.

Utilising these fields will replace the default heading of *Personal Information*, and/or the default body text of *Please enter the same details that you used to register for the course.*

Completion Text

Control the heading and body text of the completion page shown to users after a short course registration has been completed.

If utilised, the heading will replace the default of *Registration Complete*, whereas the body text will replace: *Thank you for completing your registration with us.One of our friendly staff will be contacting you shortly.*

Mandatory Steps

These settings provide options for the required steps in the registration process. **Force collection of Gender** and **Require Signature Pad** are the only options currently available, and both function in the same way as the options of the same name for the standard registration process.

Registration Steps

These settings alter the steps in the registration process for Data Completions.

Contact Details is traditionally a mandatory step, however for Data Completions it is optional. The settings are the same as for the standard registration process, with two exceptions:

- **Require Contact Details** - enable/disable the Details step with this setting.
- **Populate address details** - if enabled, this will prefill the address information from the client's VETtrak record.

The *USI Step* can be enabled, but **Force Collection of USI** is the only additional option available for Data Completions.

The *AVETMISS step* and options function the same as with the standard registration process.

Parent Workflow

The Parent/Guardian Workflow can be enabled for VETenrol to detect if the client is a minor and then prompt the user for the email address of their parent or guardian.

The parent/guardian will receive an email requesting them to authorise the registration and complete payment (if required). The registration will only be pushed to VETtrak on completion of the parent endorsement.

Choose *Settings > Parent Workflow* to manage settings for this feature.

- Enable this feature by ticking the **Enable workflow** checkbox.
- **Notice** is the text presented to the user explaining why their parent's signature is being requested. The system default will be used if this is left blank.
- **Parent Notice** is the text presented to the parent. The system default will be used if this is left blank.
- **Subject** and **Body** are for the email sent to the parent/guardian. System defaults are used if these are left blank. Click the Edit icon ( ) for the Body field to enter your own message. If you would prefer to adjust the system default, click the **Default** button to insert the default text into the body field, then click 🖉 to open the editor and make changes.
- **Blurb** is the text presented to the minor on confirming their registration. This appears beneath the heading, "Thank You" which is a page that replaces the usual on-screen confirmation.

During the registration process, a user determined to be a minor will be presented with the following text (by default) at the final step of their registration. Payment options will not be given.

Screenshot depicts defaults (setting fields left blank) of Parent Workflow, from the user perspective.

A parent/guardian, on clicking the link provided in their email, will be presented with the regular Confirm step, including the Payment Options. They will also see the regular on-screen confirmation step and receive the confirmation/receipt email.

Screenshot depicts registration completion from the parent/guardian's perspective.

While a parent/guardian's approval is still pending, the registration will be considered an incomplete saved registration. It will only be viewable when either of the status filters *View incomplete saved registrations* or *View Pending Parent Workflow Registrations* are selected.

Should the parent/guardian's approval not be received, there are a number of options available:

- **Cancel Registration**
  Where the parent has refused consent, or significant time has passed to suggest that consent is not going to be received, the registration can be cancelled. The option to cancel can also be used for duplicate pending registrations once consent has been received for one of them.

- **Update Parent Email**
  In the case of an obvious error in the email, or receiving new details, you can edit the parent's email address and click the Update button to save the change. The notification can then be re-sent to the new email.

- **Create Web Enrolment**
  In certain situations, it may be desirable to forgo the parent's approval and process the registration as is. For example, if the student registers just days before turning eighteen.

- **Re-send notification**
  The notification to the parent can be resent from Registration Details, as either a reminder or due to the parent's email being updated.

Rapid Registration Settings

Rapid Registrations are a greatly condensed version of the registration process, that is aimed at non-accredited training, and short courses with minimal compliance requirements.

Choose *Programmes > Rapid Registration Settings* to manage settings for this feature.

Display Settings

These settings affect the courses page.

The **Low Limit** option determines the number of remaining vacancies required before the *Book now* button label will be replaced with *Almost Full*.

Time Format allows the selection of 12 hour or 24 hour time to be displayed for the occurrence start time.

Show all occurrences will display inactive/closed occurrences. This will result in displaying every past occurrence that is still published for any programme that also has at least one occurrence published in the future with a start date falling within the time frame set by the *Months to Show* value. This is the rapid equivalent for the Site Setting of the same name.

Allow enrolment into expired occurrences allows customers to register after the close date of an occurrence. *Show all occurrences* must be enabled for this option to work. This is the rapid equivalent for the Site Setting of the same name.

The **Show vacancies** option adds the number of remaining vacancies to the course details.

| *Courses (Rapid) - with Low Limit active* | *Courses (Rapid) - Default* | *Courses (Rapid) - Show Vacancies* |

The final option, **Show list of classes**, does not affect the courses page. Rather, it displays a list of classes for the occurrence(s) on the Rapid Registration page. The option is enabled by default.

| *Show classes list (☐ disabled)* | *Show classes list (☑ enabled - default)* |

Data Collected

These settings relate to the information that will be collected during the rapid registration process.

Each '**Collect**' option enables a field for the first step of the Rapid Registration process, whereas the '**Force collection of**' options make the relevant field mandatory.

*TOP: Register step (Rapid) - default
all Data Collected options unticked.*

*RIGHT: Register step (Rapid) - 'Collect...' options
in the Data Collected section enabled.*

The **Enable Notes field** option provides a note field. The **Label** field allows the default Notes heading to be customised.

Enable Notes field (☐ disabled - default)

Enable Notes field (☑ enabled), Label field blank

Formatting

These settings relate to customisable elements of the rapid registration process.

Register step (Rapid Registration)

- The **Agree label** is the text applied to the checkbox for the Terms & Conditions.

- **Terms & Conditions** is the text displayed to the user, appearing below the checkbox and label. There is no default text available for this.

Processing

Add web reservation prior to payment is an option that applies VETenrol's default behaviour for registrations to the rapid process. If enabled, registrations will be added to Web Enrolments in VETtrak prior to payment being completed. Otherwise, the rapid process will use the default of waiting for payment before sending details to VETtrak.

The **Force auto-process of web reservations** option ignores the VETtrak publish option to Auto-process web reservations and behaves as if it is enabled for every Rapid Registration. This means when the web enrolment is received, the client matching and enrolment creation are done automatically.

Do not update matched client details will keep the existing client details in VETtrak when client matching auto-processed registrations.

Alerts & Notifications

These settings relate to automated email notifications for staff members and visual alerts/notifications for customers.

New Registration Alerts

This feature is intended as a reminder service for the staff member(s) required to process registrations.

The Email Alerts feature is toggled on (☑) or off (☐) using the '**Receive new registration alerts**' checkbox.

Specify the email address where notifications are to be sent in the '**Alert Address**' field. The field will be disabled if the '**Receive new registration alerts**' checkbox is unticked. If you would like to have alerts sent to multiple email addresses, separate each address with a semi-colon.

New Enquiry Alerts
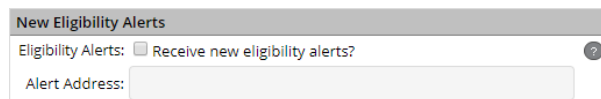
This feature is intended as a reminder service for the staff member(s) required to review eligibilities.

The Email Alerts feature is toggled on (☑) or off (☐) using the '**Receive new enquiry alerts**' checkbox.

Specify the email address where notifications are to be sent in the '**Alert Address**' field. If you would like to have alerts sent to multiple email addresses, separate each address with a semi-colon. This field will be disabled if the '**Receive new enquiry alerts**' checkbox is unticked.

New Eligibility Alerts

This feature is intended as a reminder service for the staff member(s) required to review enquiries.
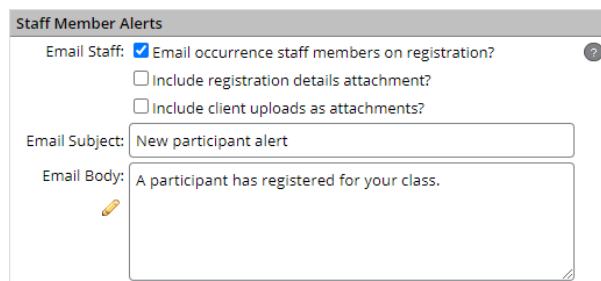
The Email Alerts feature is toggled on (☑) or off (☐) using the '**Receive new eligibility alerts**' checkbox.

Specify the email address where notifications are to be sent in the '**Alert Address**' field. If you would like to have alerts sent to multiple email addresses, separate each address with a semi-colon. This field will be disabled if the '**Receive new eligibility alerts**' checkbox is unticked.

Staff Member Alerts

Toggle the sending of automated email notifications to the staff member(s) responsible for the occurrence for which a customer has registered.

To use this feature:

- Enable the '**Email Staff**' checkbox.
- Optionally, tick '**Include registration details attachment**' if you want the email sent to the staff member(s) to include a copy of the registration data as an attachment.
- Optionally, tick '**Include client uploads as attachments**' if you want the email sent to the staff member(s) to include all of the files uploaded during the registration process.
- Enter the '**Email Subject**', which will be the subject line of the email notification.
- Enter the '**Email Body**', which will be the message. You can click the edit icon to open a text editor, which will input the resulting html code into the Email Body when you have finished creating and formatting your message.
- Click the '**Save**' button for the page.

> **NOTE**: You will need to have staff members assigned to your occurrences in VETtrak. A staff member must also have a valid email address (set in VETtrak) for the alert to work.

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Error Notifications

Invalid ProgID

Displayed to a customer should an error occur with the programme ID. If the field is left blank a default notification will be used. The field accepts HTML.

Sample of default notification.

Invalid OccuID

Displayed to a customer should an error occur with the occurrence ID. If the field is left blank a default notification will be used. The field accepts HTML.

Sample of default notification.

No Vacancies

Displayed if a customer tries to register in an occurrence with no vacancies. If the field is left blank a default notification will be used. The field accepts HTML.

Sample of default notification.

See also: HTML Code on page 253 regarding creating a custom message.

Notices

These settings relate to customising or adding notices for customers through-out the registration process.

Personal Information Notice

Allows custom text to be displayed on the first step of the registration process regarding personal details.

Above: 'Personal Information Notice' field left blank.

Right: Customer View.

Above: 'Personal Information Notice' field with default text.

Right: Customer View.

See **also**: The user Experience on page 28.

Group Booking Introduction

This text is displayed between the section heading and the fields.

Above: 'Group Booking Introduction' field left blank.

Right: Customer View

Above: 'Group Booking Introduction' field with text.

Right: Customer View

Residential Address Notice

Allows custom text to be displayed at the second step of the registration process under the residential address heading.

Above: 'Residential Address Notice' field left blank.

Right: Customer View.

Above: *'Residential Address Notice' field with custom text.*

Right: *Customer View.*

See also: The user Experience on page 28.

USI Step Introduction

This field controls the introduction for the USI step. It can contain basic HTML.

Leave the field blank to use the system default.

The '**Default**' button in the section header inserts the system default text for editing.

Customer View showing USI Step Introduction default.

Custom Proof of Identity Note

This is introductory text displayed between the statement requesting details of the identification that can be provided and the table of accepted identity documents.

'Custom Proof of Identity Note' field left blank.   *Customer View*

'Custom Proof of Identity Note' field with default text   *Customer View*

Concession Step Introduction

This field controls the introduction for the Concession step, which appears under the heading *Concession Application*. The introduction can contain basic HTML.

The '**Default**' button in the section header inserts the system default text for editing.

Customer View showing Concession Step Introduction default.

AVETMISS Notice

This is introductory text displayed between the step heading and the first of the questions for the AVEMISS step.

If the AVETMISS Notice is left blank, no introductory text will be displayed.

Above: 'AVETMISS Notice' field with text (html)

Right: Customer View (Less relevant areas have been shaded).

RPL Introduction & Doc Verification

The text shown at the RPL step can be customised using this feature.

ABOVE: RPL Introduction & RPL Doc Verification fields with text

RIGHT: Customer View

These fields accept text and basic HTML, special variables can also be included. Leave the fields blank to use the system default. Click '**Default**' to insert the system default text for editing.

Customer View: System Default for RPL Introduction

Customer View: System Default for RPL Doc Verification

See Also: The Appendices HTML Code on page 253 and Special Variables on page 256.

Sundry File Upload

Heading

This field controls the heading text for the Sundry File Upload. If it is left blank, 'Document Upload' will be used as the heading by default.

Text

This field controls the instructions provided for the Sundry File Upload section. If it is left blank, the default will be used, which is 'If you have any other documentation that may help with your registration, upload a copy of it below'.

Customer View showing Sundry File Upload defaults

Submission Notice

This is text displayed at the end of the registration process, just prior to confirming the registration.

Above: *'Submission Notice' field with text (html)*

Right: *Customer View (Less relevant areas have been shaded).*

Completion Step Additional Text

Intro

This field allows additional text/HTML to be displayed at the Registration Confirmation step. Entered content appears at the beginning of the Registration Confirmation step.

Customer View showing sample text from Intro field

Outro

This field allows additional text/HTML to be displayed at the Registration Confirmation step. Entered content appears at the bottom of the Registration Confirmation step.
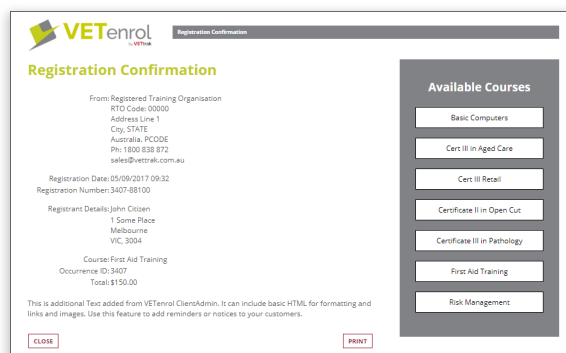
Customer View showing sample text from Outro field

EFT

This field allows additional text or HTML to be displayed at the Completion step for when EFT payment option has been selected. Entered content appears immediately after the EFT Details heading.

> **NOTE**: The Outro text is displayed after the EFT details section.
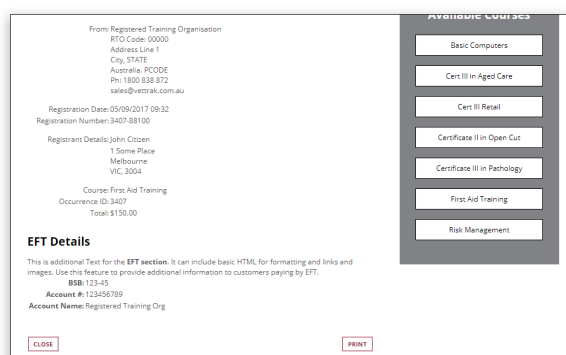
Customer View showing sample text from EFT field

See also: HTML Code on page 253 regarding creating a custom message.

Confirmation Email

These settings provide control over the automated email sent to customers once they complete the registration process.

- **Subject Line**
  The subject line for the email. The system will use the default if this is left blank.
    – Click the **Default** button to insert the default Subject Line for editing.

- **Message**
  The message component of the email. Enter text or HTML here to override the system default.
    – Click the **Default** button to insert the default message for editing.
    – Click the 🖊 icon to open the editor.

- **EFT Notice**
  Text provided for displaying banking details if EFT was selected as the customer's payment method. This text is included in the message component as required. Enter text or HTML here to override the system default.
    – Click the **Default** button to insert the system default for editing.
    – Click the 🖊 icon to open the editor.

- **Group Registration Participants**
  These settings relate to the sending of confirmations to individuals identified in group bookings.
    – **Send Participant Email**
      Enable this checkbox to send an email to individuals registered via a group booking (where emails have been supplied).
    – **Mail Template**
      Select the template to be used when sending the email.

- '**Include copy of registration details as attachment**' checkbox.
  Toggle this option to include a PDF version of the complete registration details as an attachment to the notification email.

- '**Exclude signature areas from attachment**' checkbox.
  Toggle this option to remove or include the signature section in the attached registration details.

- '**Do not send confirmation email**' checkbox.
  Toggle this option to allow or prevent the sending of the confirmation email that normally goes out upon completion of the registration process.

- The '**Preview**' button.
  Use this to view the resulting message. Changes must be saved to display. System defaults will be used for Message or EFT Notice if they are left blank.

The system defaults produce the following:
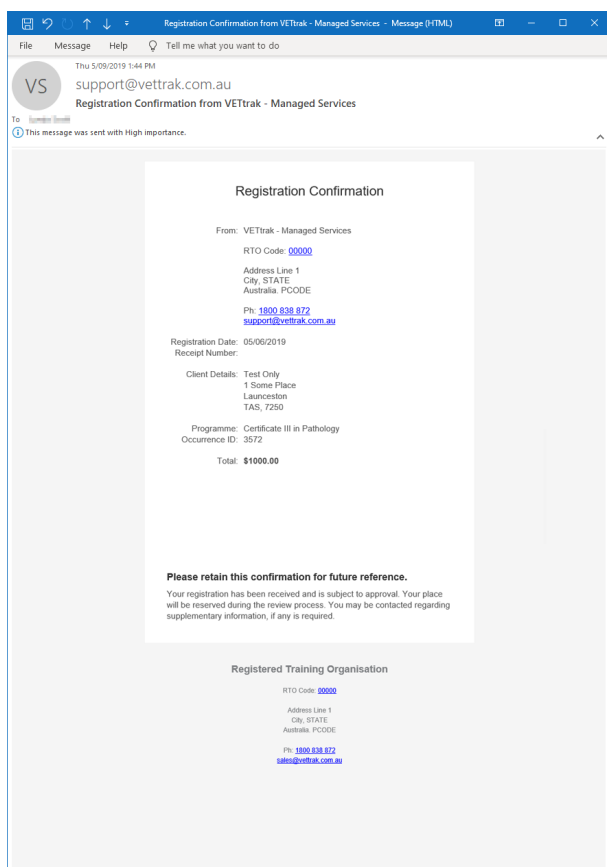
Standard confirmation email
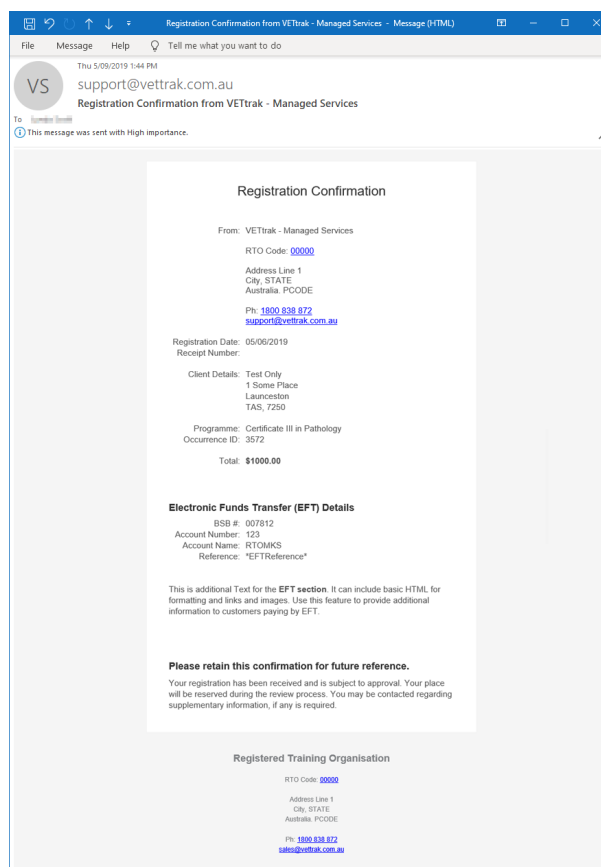
Confirmation body including 'EFT Section'.

See also : Client Documents on page 83 for details on including course related attachments to the confirmation email, and Special Variables on page 256 and HTML Code on page 253 for more information on customising the content of these fields.

Agreements

Sets custom text to be displayed during the registration process for various agreements, including collecting student numbers and Working With Children card details. With the exception of the required Terms & Conditions, the relevant registration steps must be enabled before the other agreements are applicable.

- The '**Preview**' buttons
Shows how the text will appear in the registration process. The preview is displayed in a pop-up box.

- The '**Default**' buttons
Inserts the built-in default for the agreement with which they are associated. Defaults are used if an agreement field is left blank. Inserting the default provides a basis for customising the agreement, and is an easy way to make minor changes to the default text.

- '**Terms & Conditions**'
You can modify the standard Terms & Conditions statement displayed to your customers during registration here. The text appears in the scrollable area at the Confirm step. Changes will apply to new registrations from the time of save, but not to registrations already in progress or completed.

> **NOTE**: Line breaks are automatically added to blank lines regardless of text or html input.

- '**VSN Agreement**'
This field can be used to change the text that appears at the end of the Student Number step

for Victorian students. Customers must tick the accompanying checkbox to proceed with the registration. The positioning of the checkbox and its label cannot be altered.

- **'S4A Agreement'**
  The text appears at the end of the Student Number step for South Australian students. Customers must tick the accompanying checkbox to proceed with the registration.

- **'NSW Smart & Skilled'**
  The text appears as part of the S&S step for New South Wales students. Customers must either tick the accompanying checkbox or choose not to apply to proceed with the registration.

- **'Working With Children Terms'**
  This text appears as an introduction to the WWC step of the registration process.

- **'USI Privacy'**
  This text appears at the USI step, if the user opts to have the RTO create a USI on their behalf.

- **'VET Student Loans Terms'**
  This text appears at the VET Student Loans step.

> **See also**: regarding enabling the relevant steps in the registration process.

Employers

The Employers menu item allows the management of the list of known employers for selection on the Employer step.

To load the list of VETtrak Employers:

1. Click the '**Fetch VETtrak Employers**' button.

To populate the list:

2. Select the '**VETtrak Employer**' from the list.
3. Click the '**Populate**' button.
4. Their contact information will be pre-filled from VETtrak. Update if required.
5. Click the '**Save**' button.

The Employer will be added to the Employer List table:

Employers in the list can be viewed and modified by clicking their name, or removed from the list by clicking the '**delete**' link associated with their name.

> **See also**: Registration Steps on page 158 regarding enabling the Employer Step.

Enrolment Status

Allows the available statuses to be enabled or disabled.
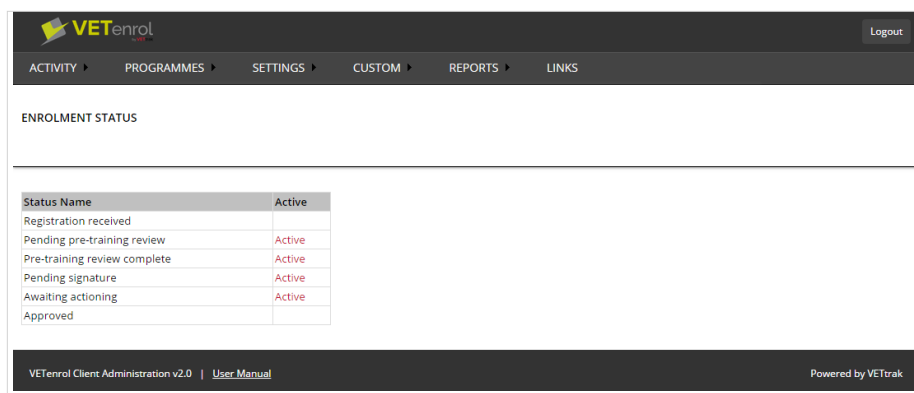
- Click the link in the Active column for the applicable Status to toggle between Active and Inactive. A status that is inactive is displayed with a line through the status name and the link.

Email Templates

The Email Templates feature allows commonly used messages to be stored for use.

Attachments are managed on a per template basis, whereby a file must be uploaded for each individual template.
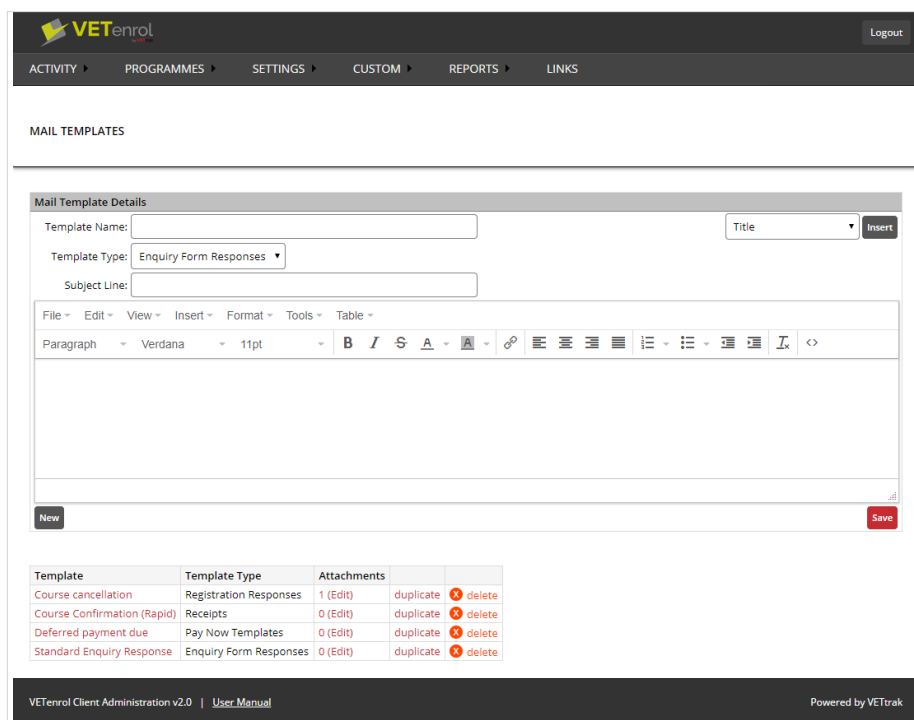
The primary elements are:

- The '**Mail Template Details**' section to facilitate the creation of new templates and allow existing templates to be viewed and modified.
- Template List table for saved templates, which allows them to be managed.

Creating a Template

Templates are created using the Mail Template Details section:

1. Enter a '**Template Name**' to identify the template.
2. Select the '**Template Type**' for where it will be used.
    - *Enquiry Form Responses* are for use with Enquiries.
    - *Registration Responses* are for use with Registrations and can be selected when emailing from Registrations or Registration Details.
    - *Pay Now Templates* are for use with Deferred Payments, or for registrations with the credit card Pending Payment status. Templates of this type can only be selected when emailing from Registration Details.
    - *Receipts* are for use with Registration Receipts.
3. Enter the '**Subject Line**' that will be used for the email.
4. Enter the message. To assist in formatting your message, the following are available:
    a. Placeholder variables.
        - Select the variable and click the insert button to add it to your message. It will be inserted at the current or last known cursor position.
        - Some placeholders may not be available for all template types.
        - When using the template, the placeholder variable will be replaced with the appropriate value for the customer.
    b. Toolbar.
        Holding your mouse over icons will identify their function.
5. Click the '**Save**' button.

The created template will appear in the List table. This template can now be used. It is also possible to assign attachments to the template at this stage.

Managing Templates

Once a template has been created, the Template List table allows them to be managed. This includes assigning attachments and making changes to existing templates.

The following management features are available:

1. **Template** — This link allows the data set during creation to be modified.
2. **Attachments** —Displays the total number of attachments assigned to the template and links to the Attachment screen for editing them.
3. '**duplicate**' link — Clicking this link will create a copy of the template.
4. '**delete**' link — Clicking this link will permanently remove the template and its attachments.

Assigning Attachments

To upload files to be sent with the template message, click the '**Edit**' link under the Attachments column of the list:

The Mail Template Attachments screen will be displayed:

1. Click the '**Browse**' button (or equivalent).
   – Navigate to the required file and double-click to select it.
2. Click the '**Save**' button.

The uploaded file will be displayed in the list table.

Filename	
Refund Policy.pdf	delete
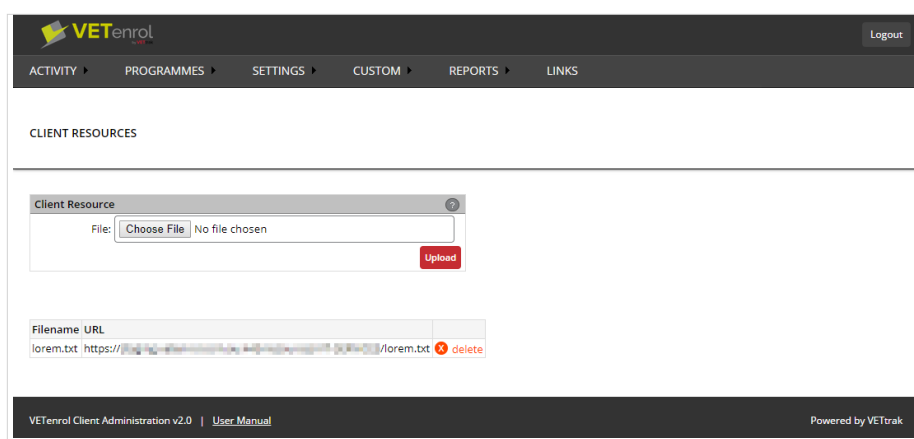
If there are more files applicable to the template, click '**New**' and Repeat Steps 1 and 2 , then:

3. Click the '**Back**' button to return to the Mail Templates screen.

Resources

Provides online storage for files.

For example: If you wish to include an image in your Welcome Text, upload the image here. The URL to that file is displayed in the list and it can be used to reference the file in html.

Once at least one file has been uploaded, there will be a list of uploaded file(s).

-   Click the '**delete**' link to permanently remove the file.

> **NOTE**: These files could also be used in Email Templates, but keep in mind that users may need to specifically choose to download the images to see them in the message.

Messages

Allows you to set a notice appearing to users when they visit your VETenrolsite.

When at least one message has been created, they will be listed in a table.

- Click the '**(Edit)**' link in the ID column to make changes to an existing message.
- Click the '**delete**' link to permanently remove the message.

Messages will be displayed by VETenrol to a user until that user closes the message.

Messages are shown on the main screen and through-out the registration process.
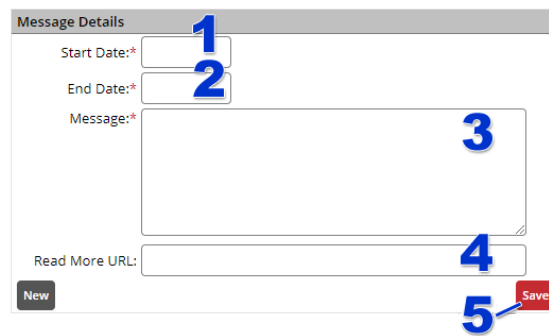
Users will continue to see messages that fall within the time period for viewing each time they visit VETenrol, unless they close the message(s).

Once a user has closed a message, it generally will not show for that user again, although if significant time has passed between visits, a message may show again.
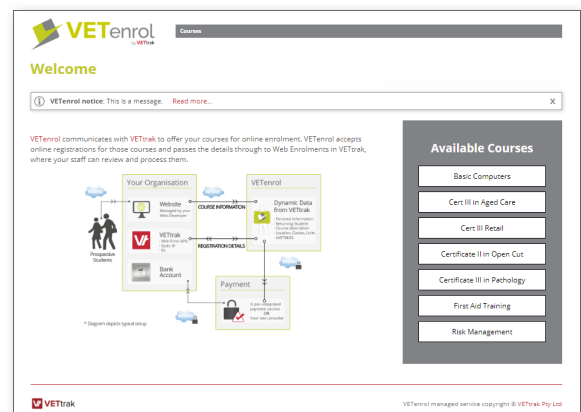
User experience

Creating a message

1. Select the '**Start Date**' for the message.
2. Select the '**End Date**' for the message.
3. Enter the '**Message**'.
4. Enter a '**Read More URL**' if you want to include a link to a webpage.
5. Click the '**Save**' button.

Custom

The Custom menu item gives control over the extra or custom features offered by VETenrol.

> **NOTE**: Many of the custom features provide a 'Save' button which must be clicked to retain changes made to any items on that screen. Refreshing the screen or navigating away before saving will discard any changes.

Custom Agreements

The Custom Agreements menu item provides control over the Agreements step in the registration process by facilitating the creation and management of agreement statements.

The primary screen elements are:

- The '**Step Introduction**' section for including text to introduce the step.
- The '**Custom Agreements**' section to facilitate the creation of new agreements and allow existing agreements to be viewed and modified.
- Agreement List table for saved agreements, which allows them to be managed.

> **NOTE**: The Agreements step is enabled when at least one agreement has been set up and a customer is registering for the course to which the agreement applies.The step requires customers to agree to each declaration in order to proceed to the next step.

Step Introduction

The Step Introduction section provides an introduction for the Agreements step in the registration process.

Customer View

1. Type the required text into the '**Text/HTML**' field.

2. Click the '**Save**' button.

The Custom Agreement Heading has been set.

Creating an Agreement

Navigate to Custom Agreements > Agreements:

Customer View

1. Enter a '**Name**' with which to identify the agreement.
2. Select the registration type the agreement '**Applies To**' from the drop-down menu.
3. Type the '**Heading**' to be displayed for this agreement at the Agreements step, if needed.

> NOTE: The Heading field only accepts plain text and will be displayed 'as entered'.

4. Enter the '**Agreement**' text. The field only accepts plain text and will be displayed 'as entered', maintaining spacing and paragraphs.
5. Click the '**Save**' button.

The agreement has been created and will appear in the Agreement List table. At this stage the agreement is inactive and will never be displayed at the Agreements step since at least one parameter must be set.

Managing Agreements

Once agreements have been created, the Agreement List table allows them to be managed. This includes setting parameters for newly created agreements and making changes to existing ones.

The listed order of the agreements also defines the display order for the Agreements step of the registration process. Although this only applies in instances where there are multiple agreements assigned to the same programme or price type.
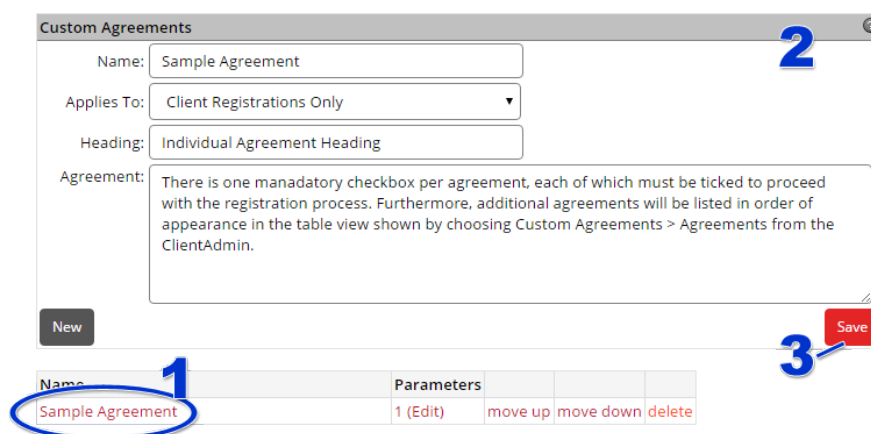
The following management features are available:

1. **Name** — This link allows the data set during creation to be modified.
2. **Parameters** —Displays the total number of parameters set for the agreement and links to the Parameter screen for editing them.
3. '**move up**' and '**move down**' links — These links provide control over the order of the list.
4. '**delete**' link — Clicking this link will permanently remove the agreement.

Modifying an Agreement

The data provided during the creation of an agreement can be modified by:

1. Click the agreement's '**Name**' in the Agreement List table.
2. Modify the entries displayed in the '**Custom Agreements**' section.

3. Click the '**Save**' button.

The Agreement List table will be updated to reflect the changes.

Editing Custom Agreement Parameters

A custom agreement's parameters determine when the agreement will be displayed at the Custom Agreements step during the registration process. Parameters are edited from the Custom Agreement List table on the Custom Agreements screen.

1. Click the '**(Edit)**' link.

This will open the Custom Agreement's Parameter screen, for example:

The Parameters screen has the following elements:

- '**Parameters: [Agreement Name]**' to facilitate the creation of new parameters for the agreement and allows existing parameters to be viewed and modified.
  - The '**Back**' button will return you to the Agreements screen.
  - The '**New**' Button clears the fields for a new parameter to be saved.
  - The '**Save**' Button will save the current entries into the Parameter List table.
- The Parameter List table contains saved agreements and allows them to be managed.
  - Click the Agreement Name links to modify the parameters.
  - Permanently remove unwanted parameters using the '**delete**' link.

> **NOTE**: The Parameter List table will only be displayed if you are editing an agreement with existing parameters. Otherwise it will be hidden until the first parameter is saved.

Creating New Parameters

1. Complete the '**Programme Name**' and '**Price Type Code**' fields as necessary.
    - Leaving both fields blank will cause the agreement to be displayed for all occurrences.
    - Entering a Programme Name only will cause the agreement to be displayed for all occurrences with that programme name.
      Note this field will also accept a programme type, which will cause the agreement to be displayed for all occurrences of all programmes with that type.
    - Only entering a Price Type Code will cause the agreement to be displayed when a customer is registering in an occurrence with the matching code.
    - Completing both fields will cause the agreement to be displayed only when a customer is registering in an occurrence where both the programme name (or type) and price type code match.

    For assistance to identify the name and/or code to enter, see Programmes on page 82.

2. Click the '**Save**' button.

The parameter has now been set and will appear in the Parameter List table. Repeat these steps to create additional parameters as needed.

Modifying Existing Parameters

1. Modify the existing parameters by clicking the '**Parameter ID**' in the Parameter List table.

This will display the entries for the parameter in the '**Custom Agreements**' section allowing them to be adjusted and saved as necessary. The Parameter List table will be updated to reflect any saved changes.

Custom Forms

This menu item provides control over the Custom step in the registration process.

The primary screen elements are:

- The '**Custom Form Header**' section to facilitate the creation of new headers and allow existing headers to be viewed and modified.
- Header List table for saved headers, which allows them to be managed.

> **NOTE**: The Custom step is enabled when at least one header has been created. A header and its associated fields will be referred to a section henceforth.

Creating a Header

Headers act as containers for custom fields. Creating a header is the first step towards creating a functioning Custom Form that will display at the Custom step of the registration process.

The header is created using the Custom Form Header section:

Customer View

1. Enter the '**Heading**' text to be displayed for the custom section.
2. Type the paragraph '**Text**' to be displayed beneath this heading. The field only accepts plain text and will be displayed 'as entered', maintaining spacing and paragraphs. It can also be left blank if it is not required.
3. Choose the option for '**Type**' to identify if the form is displayed for all programmes, or only for specific programmes.
4. Click the '**Save**' button.

The Custom Header has been created and will appear in the List table. At this stage the Custom Header is inactive and will not display at the Custom step since at least one field must be set.

Managing Headers

Once headers have been created, the Header List table allows them to be managed. This includes setting the fields for newly created headers and making changes to existing ones.

The listed order also defines the display order for the Custom step of the registration process. Although this only applies in instances where multiple Headers meet the circumstances for the registration.

The following management features are available:

1. **Heading** — This link allows the data set during creation to be modified.
2. **Applies to** — Shows if the form is included for all registrations or only selected.
   - *All* indicates the form is always displayed.
   - *Selected* indicates the form displays only when registering for specific programmes or occurrences. Click this link to manage the selected programmes/occurrences.

3. **Fields** —Displays the total number of fields in the set and links to the Field screen for editing them.

4. '**move up**' and '**move down**' links — These links provide control over the order of the list.

5. '**duplicate**' link — Clicking this link will make a copy of the Header and its fields.

6. '**preview**' link — Show a preview of the form, similar to how the user will see it.

7. '**delete**' link — Clicking this link will permanently remove the Header and its fields.

Modifying a Header

The data provided during the creation of an agreement can be modified by:

1. Click the link in the **Heading** column in the List.
2. Modify the entries displayed in the **Custom Form Header** section.
3. Click the '**Save**' button.

The List table will be updated to reflect the changes.

Selecting Programmes for a Custom Form

Custom Forms with the *Selected* Applies To setting will only display for specified programmes or occurrences and these can be viewed and managed from the *Custom Field Inclusions* page.

- Click the '**Selected**' link.

This will open the *Custom Field Inclusions* page, for example:

The primary page elements are:

1. '**Custom Form Inclusion**' section to facilitate the creation of new programmes/occurrence combinations for the form and allow existing ones to be viewed and modified.

   – Complete the '**Programme Name**' or '**Occurrence ID**' fields as necessary, to determine when the custom form will be displayed.

      ▪ Leaving both fields blank will display the form for all registrations, however this cannot be saved since it is the equivalent of having selected applies to all previously. Change the Applies To selection to achieve this effect instead.

      ▪ Entering a **Programme Name** only will cause the form to be displayed for all occurrences with that programme name.
      Note: this field will also accept a Programme Type, which will cause the form to be displayed for all occurrences of all programmes with that type.

      ▪ Entering an **Occurrence ID** only will cause the form to be displayed for that occurrence only.

      ▪ Completing both fields will cause the form to only display when registering in that occurrence. This is equivalent to an Occurrence ID only, except the programme name must also be correct for the occurrence.

   – The '**Back**' button will return you to the *Discounts* screen.

   – The '**New**' Button will clears the *Discount Details* fields for a new programme/occurrence ID to be saved.

   – The '**Save**' Button will save the current entries into the list table.

2. The list table contains saved programmes/occurrence IDs and allows them to be managed.

   – Click the *ID* links to modify the entries.

   – Permanently remove unwanted entries using the '**delete**' link.

> **NOTE**: The list table will only be displayed when editing a form with existing entries. Otherwise it will be hidden until the first entry is saved.
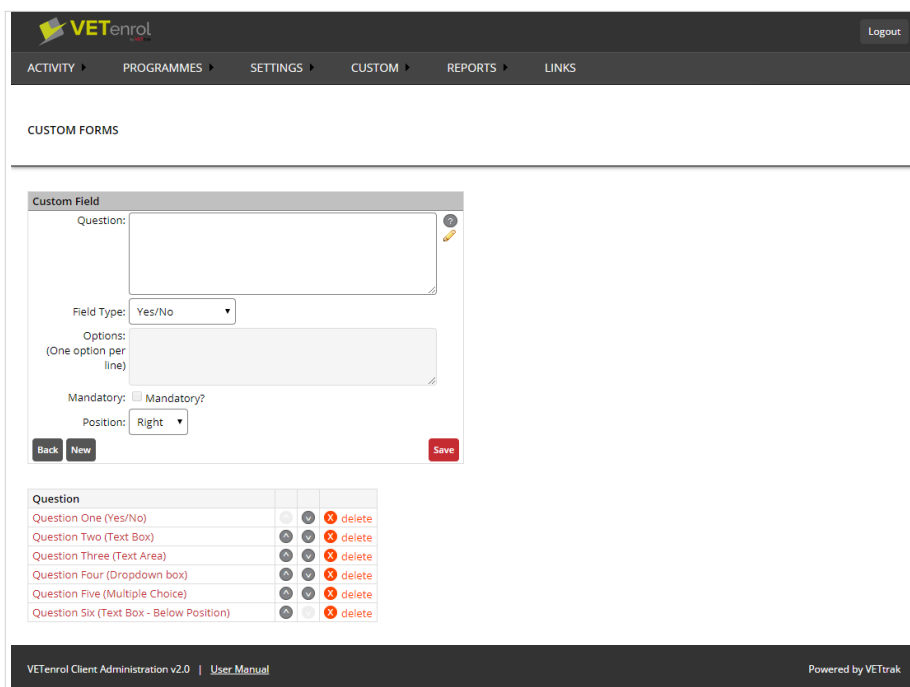
Editing Fields

Fields are edited from the Header List table on the Custom Forms screen.

1. Click the '**(Edit)**' link in the *Fields* column of the List.

This will open the Custom Fields screen, with the following elements:

- The **Custom Field** section facilitates the creation of a new field or allows existing fields to be viewed and modified.
  - The '**Back**' button will return you to the Custom Forms screen.
  - The '**New**' Button clears the fields for a new question to be saved.
  - The '**Save**' Button will save the current entries into the Parameter List table.
- The Field List table contains saved fields and allows them to be managed.
  - Click the Question links to modify the field.
  - Permanently remove unwanted fields using the '**delete**' link.

> **NOTE**: The Field List table will only be displayed if you are editing a form header with existing fields. Otherwise it will be hidden until the first field is saved.

Creating a New Field

1. Enter the '**Question**' to be displayed.
2. Select the '**Field Type**' from the drop-down menu that will be for the answer.
    –   *Yes / No*: Yes and No options are provided in the form of a drop-down menu.
    –   *Text Box*: A field accepting a short answer such as a single word or sentence.
    –   *Text Area*: A field accepting a long answer such as a paragraph or more.
    –   *Dropdown box*: Your own customised answers provided in a drop-menu.
    –   *Multiple Choice*: A checkbox provided for each option allowing multiple answers to be ticked.

3. Enter options if relevant for the selected Field Type.

4. Enable the '**Mandatory**' checkbox if an answer must be provided before being able to move on to the next step.
5. Choose the **Position** for the answer field:
    –   To the *Right* of the question
        OR
    –   *Below* the question.
6. Click the '**Save**' button.

Customer View showing Positions

The field will now appear in the Field List table. Repeat these steps to create additional fields as needed.

Modifying an Existing Field

An existing field can be modified by clicking the **Question** in the Field List table.

This will display the entries for the field in the '**Custom Field**' section allowing them to be adjusted and saved as necessary. The Field List table will be updated to reflect any saved changes.

Eligibility Builder

The Eligibility Builder, available from the *Custom* sub menu, provides a simplified method of creating an eligibility link. By choosing the desired form and outcomes, generate a link that can be sent to users or added to your website.

The primary screen elements are:

- The '**Eligibility Builder**' section for selecting the form.
- The eligibility table showing the questions and outcomes for the selected form, where each of the outcomes must be set so that a valid URL can be generated.
- The '**Result**' section
  - The URL to match the Eligibility Builder options, updated as changes are made.
  - The '**copy**' link for the URL.
  - '**Eligibility Name**' to specify a name for the current URLfor saving.
  - The '**New**' button will reset the selected form and outcomes to the defaults. The Eligibility Name will also be cleared.
  - The '**Save**' button to save the existing result link and name.
- The table of saved eligibility links (only displayed once at least one link has been saved).

Building an Eligibility Link

> ⓘ **NOTE**: You may want to refer to the Summary Report to obtain some relevant IDs before building a link.

To build a link for an eligibility form:

1. Select an '**Eligibility Form**' from the drop-down menu.

Then, for each outcome in the table:

2. Click the link for the '**No Outcome**' or the '**Yes Outcome**' to set the result.

3. Choose an '**Outcome Type**' from the drop-down menu. The outcome type controls what will occur if the user receives this outcome.
    You may need to supply some additional details here before clicking '**OK**' to confirm the selection. The following outcome types are available:
    - *Contact form* presents the user with an enquiry form.
    - *Occurrence Registration* directs the user to a specific occurrence.
        - *Occurrence ID* must be specified to identify which occurrence.
        - *Price ID* is recommended to identify the pricing that applies.
    - Programme Registration directs the user to a specific programme where they can choose their desired occurrence.
        - *Programme ID* must be specified to identify the programme.

The link will be generating as you make changes. Once all outcomes have been set the link will be ready for copying and use elsewhere.

4. Click the '**copy**' link.

Paste the link into a document, email or other location for use. You can also paste the link into your browser's address bar to experience the eligibility form as a user for testing purposes.

> **NOTE**: Be sure to always use the link as it is originally built. If you open the link in a browser, the address will change for security and privacy purposes. Other people will not be able to use a link copied from your browser address bar, even though it may continue to work for you for some time.

If you wish to save and reuse the link:

5. Enter a meaningful '**Eligibility Name**' to help identify the link for future use.
6. Click the '**Save**' button.

The saved eligibility link will appear in a table, where it can be edited, duplicated or deleted.

Registration Builder

The Registration Builder, available from the *Custom* sub menu, provides a simplified method of creating a registration link. By choosing the desired programme details, generate a link that can be sent to users or added to your website.

The primary screen elements are:

- **Workflow** sets the type of URL you want.
    - *Standard* is the default registration type.
    - *Kalendar* shows links to the calendar (with the course list).
    - *Rapid Registration* shows direct links for rapid registration.
    - *Website Widget* shows the iFrame source link for the Courses Page, that will trigger Rapid Registrations (if the feature is enabled).
- The '**Registration Builder**' section for selecting course details. Depending on your selected workflow, some elements may be hidden.
- The '**Participant Details**' section to optionally specify some basic pre-fill details for the recipient of the link (applicable only for the standard workflow).
- The URL, updated as changes are made to the other sections, and its '**copy**' link.

Building a Registration Link

To build a link:

1. Select the **Workflow** to choose the type of URL you want. For this example, *Standard* is selected.
2. Select a **Programme** from the drop-down menu. This is mandatory for all workflows.
3. Optionally, select the **Occurrence ID** matching the desired occurrence.
4. Optionally, select the **Price** type. This is only applicable to the standard workflow.
5. The **Participant Details** are applicable to standard links only, and also require the occurrence ID to specified. If the link is intended for a single participant only, and you already know some of their details, you can also enter any of the following:
   - **Given Name** for the participant's first name only (do not include middle names).
   - **Surname** for the participant's family name.
   - **DOB** for the participant's date of birth.

The link will be generating as you make changes. Once all the desired options have been set the link will be ready for copying and use elsewhere.

6. Click the '**copy**' link.

Paste the link into a document, email or other location for use. You can also paste the link into your browser's address bar to experience the eligibility form as a user for testing purposes.

> NOTE: Be sure to always use the link as it is originally built. If you open the link in a browser, the address will change for security and privacy purposes. Other people will not be able to use a link copied from your browser address bar, even though it may continue to work for you for some time.

LLN Quizzes

The LLN Quizzes menu item provides access to the Language Literacy and Numeracy quiz management features. Applying an LLN to a programme will enable the LLN Quiz step in the registration process when a customer registers for that programme.

The LLN Quizzes screen has two key elements:

- The LLN Quiz section — used to create a new quiz or modify an existing quiz.
- The LLN Quiz list table — for managing existing quizzes.

Creating a Quiz

To create a new quiz:

1. Type in a '**Quiz Name**' to identify the quiz.
2. Optionally, provide an '**Introduction**' for your quiz. This field accepts basic html.
   - The '**Default**' button in the section header will insert the standard introductory text.
3. Enable the '**Multi-level question bulleting**' check box if you want to number sections instead of questions.

A single question in a section will not be assigned a label, however those with multiple Questions will be assigned a), b), c), etc. If this option is not enabled each question will be numbered sequentially regardless of the section to which it belongs.

For example: if you subsequently create a section with two questions:

Default	Multi-level

Section content
  1. Question
  2. Question
	1. Section content
	    a. Question
	    b. Question

4. Click the '**Save**' button.

The quiz will appear in the LLN Quiz table and is ready to be populated.
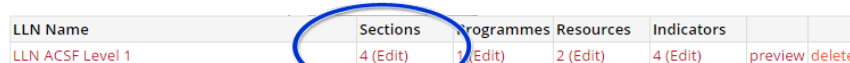
Designing Quiz Content

Quiz content is made up of sections with questions and answers. The most basic quiz would have just one section and a few questions, whereas a more complex quiz would be made up of multiple sections.

A section provides instructions or background information for a set of questions, for example: a case study. The set of questions may vary in type or style, but are related in that the section information provides the details needed to find the answer.

If the quiz is to include images or documents to which the customer will need to refer, those files need to be uploaded first. Instructions are provided in the topic: Assigning Resources on page 231.

To begin populating a LLN Quiz, you must create at least one section. Click the '**Edit**' link under the Sections column:

The following screen will be displayed:

1. Enter the text (or HTML) for the section. If resources were uploaded and need to be included in this section, HTML is required. Reference the file, depending on its type, as an image or a link.
2. Click the 'Save' button.

Repeat these steps to create additional sections, if required, or continue on to set the questions.

Once created, Sections appear in the Sections list table:

3. Click the '**Edit**' link.

4. Type the '**Question**' in the field provided.
5. Enter the '**Answer**' to the question posed in the previous step.
6. Specify the size in **Rows** of the answer field. Defaults to 3 if left blank.
7. Click the '**Save**' button.

Repeat steps 4 to 7 for as many questions as apply to the section.

8. Click the '**Back**' button to return to the Sections screen.

Return to Step 3 if additional Sections were created and require populating, otherwise:

9. Click the '**Back**' button to return to the LLN Quizzes screen.

Including Programmes

The quiz requires at least one programme assigned for the quiz to be active. The quiz will only be included as a step in the registration process for the programmes specified.

To include programme(s), click the '**Edit**' link under the Programmes column:

The following screen will be displayed:

1. Enter the '**Programme Name**' in the field provided.
2. Click the '**Save**' button.

Repeat Steps 1 and 2 if the quiz should be applied to additional Programmes, then:

3. Click the '**Back**' button to return to the LLN Quizzes screen.
   OR
   Prevent the LLN being displayed for some of an included programme's occurrences as described in Applying Exclusions below.

Applying Exclusions

If there are certain occurrences for a programme for which the LLN is not required, these can be excluded by price Type from the Inclusions List table.

To exclude a price type, click the '**Edit**' link under the Exclusions column:

The following screen will be displayed:

1. Enter the '**Price Type Code**' in the field provided.
2. Click the '**Save**' button.

Repeat Steps 1 and 2 if the quiz should be excluded for other occurrences, then:

3. Click the '**Back**' button to return to the LLN Quiz Inclusions screen.

Assigning Resources

To upload resource(s) for use in the quiz, click the '**Edit**' link under the Resources column:

LLN Name	Sections	Programmes	Resources	Indicators		
LLN ACSF Level 1	4 (Edit)	1 (Edit)	2 (Edit)	4 (Edit)	preview	delete

The following screen will be displayed:

1. Click the '**Browse**' button.
   - Navigate to the required file and double-click to select it.
2. Click the '**Upload**' button.

The uploaded resource will be displayed in the list table. Make a note of the URL as this will be required to reference your resource when inputting Section HTML.

For example:

- Link to the file.
  Click here to download
- Display the image on screen at the LLN step.
  <img src="**URL**">

Repeat Steps 1 and 2 if there are more files applicable to the quiz, then:

3. Click the '**Back**' button to return to the LLN Quizzes screen.

Setting Indicators

Indicators refer to the ACSF Skill Level Indicator. It enables an ACSF Skill Level Indicator to be specified for a single question or a range of questions. It is designed to assist the LLN assessor.

To set the indicators for the quiz, click the '**Edit**' link under the Indicators column:

LLN Name	Sections	Programmes	Resources	Indicators		
LLN ACSF Level 1	4 (Edit)	1 (Edit)	2 (Edit)	4 (Edit)	preview	delete

The following screen will be displayed:

1. Specify the '**Questions**' range in the field provided.
2. Enter the '**Indicators**' for the question range.
3. Click the '**Save**' button.

Repeat Steps 1 and 3 until all questions in the quiz have been covered, then:

3. Click the '**Back**' button to return to the LLN Quizzes screen.

Managing Quizzes

The LLN Quiz list table displays the existing LLN quizzes and allows management of the following:

1. LLN Name
   The name of each LLN is a link that will populate the LLN Quiz section with the values set when the LLN was created and allow modification.
2. Existing LLN settings and content.
   The '**Edit**' links allow modification.
3. Preview the LLN as it will be displayed to students (branding elements not shown).
4. Record removal
   The '**Delete**' link will permanently remove the LLN and any associated settings.

Choosing to modify an existing LLN, using the '**Edit**' links, will display the relevant list table with data that can be modified or deleted although in the case of Resources, only delete is available.

Viewing Quiz Results

When an LLN is included for a programme as part of the registration process, the results are recorded as part of the registration information in the Client Administration interface. The LLN results are provided at the bottom of the Registration Details, which are accessible by choosing Registrations from the menu and then clicking the customer's name.

The following example shows how LLN results are displayed:

1. LLN Indicator information provided as a reference to assist with assessment.
2. Questions in the LLN
3. Customer responses to the questions.
4. Correct answers to the LLN are provided as a guide.

Reports

VETenrol offers a number of reports via the Client Administration.

Mail Summary

The Mail Summary shows the records of all emails sent from Registrations or Registration Details in VETenrol.
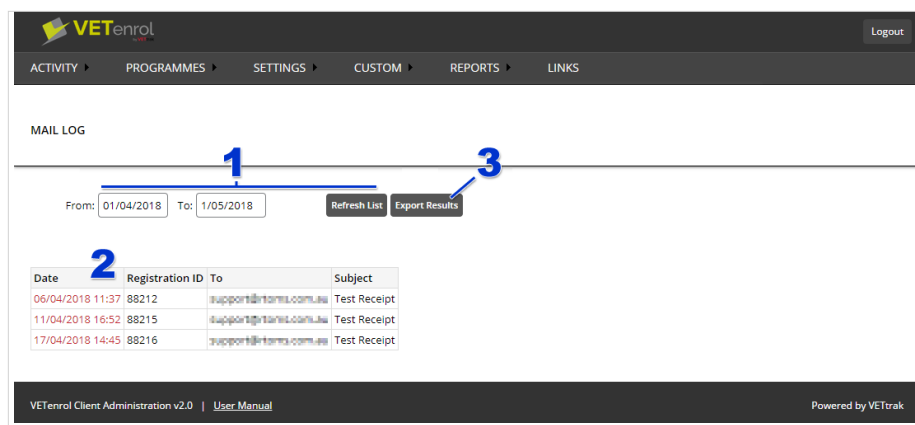
The Mail Summary includes:

1. Filter.
   The '**Start**' and '**End**' fields are used to filter the log by date range. Clicking either field will display a calendar showing the current month, but it is also possible to manually enter the desired date using d/m/yyyy format.
   - Leave '**Start**' blank to include all available data however old.
   - Leave '**End**' blank to include all data up to the current date.
   - '**Refresh**' is used to apply the current date filter(s).

2. Log entries.
   The following information is recorded for each entry (if/when available):
   - **Date** is the date and time when the message was sent.
   - **Registration ID** of the registration from where the email was sent.
   - **To** is the receiving email address.
   - **Subject** is the subject line of the message that was sent.

3. '**Export Results**' button — Saves the data displayed as an Excel spreadsheet (.xlsx).

Message History

The Message History shows the messages VETenrol has ever displayed.
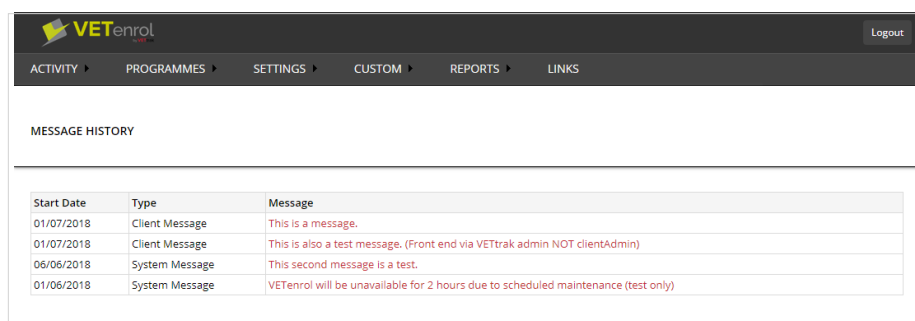
Details include:

1. Start Date — Date the message first appeared.
2. Type.
   Identifies the audience of the message:
   – **Client Message** is a message presented to users browsing or registering via VETenrol. It may have been set by your organisation or by VETtrak Pty Ltd.
   – **System Message** is a message presented to either admin users only (eg. a message about a new feature), or all VETenrol users (eg. a notice for a scheduled service outage). It can only be set by VETtrak Pty Ltd.
3. Message — The contents of the message. This can be clicked to view the full message details.

Enrolments by Programme

This report provides a graphical representation of the quantity of registrations received within each programme.
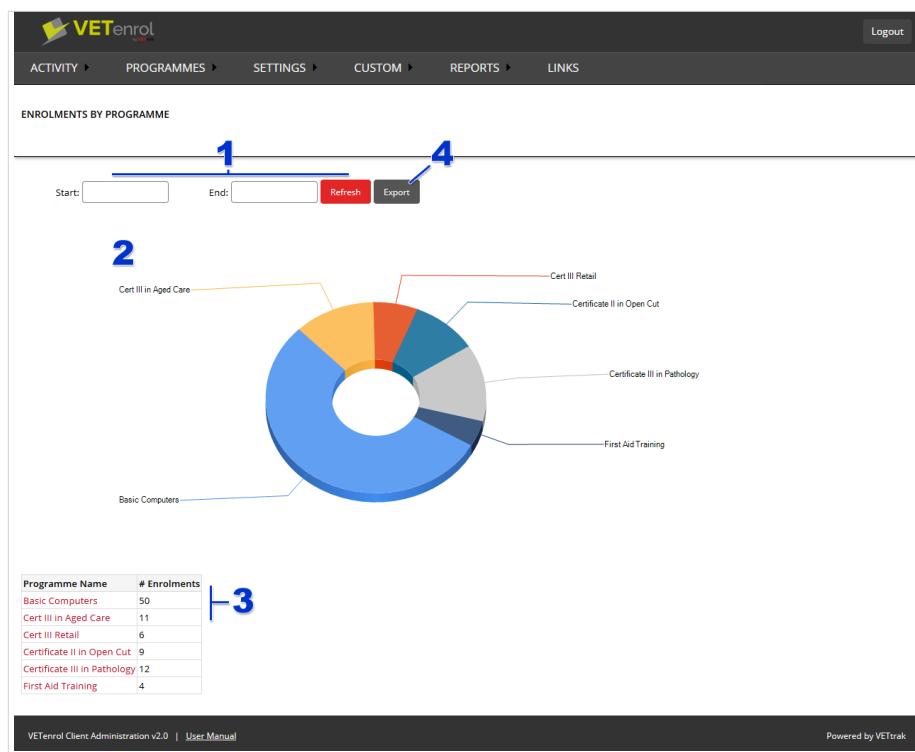
1. Result filter.
   The '**Start**' and '**End**' fields are used to filter by date range. Clicking either field will display a calendar showing the current month, but it is also possible to manually enter the desired date using dd/mm/yy format.
   – Leave '**Start**' blank to include all available data however old.
   – Leave '**End**' blank to include all data up to the current date.
   – '**Refresh**' is used to apply the current date filters.
2. Chart.

3. Data used to create the chart. Click the Programme Name link to view the list of registrations that make up the total in the **# Enrolments** column for that programme.
4. '**Export**' button — Saves the data used to make the chart as an Excel spreadsheet (.xlsx).

Enrolments by Referral Source

This report provides a graphical representation of the quantity of registrations received based on the Referral Source of the registration.
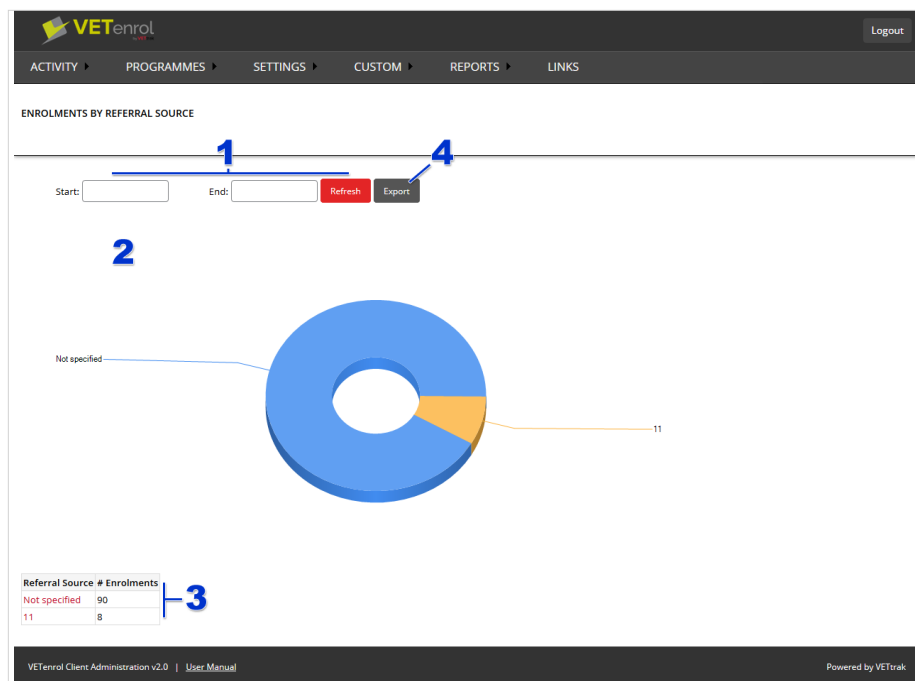
1. Result filter.
   The '**Start**' and **'End'** fields are used to filter by date range. Clicking either field will display a calendar showing the current month, but it is also possible to manually enter the desired date using dd/mm/yy format.

   – Leave '**Start**' blank to include all available data however old.
   – Leave '**End**' blank to include all data up to the current date.
   – '**Refresh**' is used to apply the current date range.

2. Chart.
3. Data used to create the chart. Click the Referral Source link to view the list of registrations that make up the total in the **# Enrolments** column for that Referral Source.
4. '**Export**' button — Saves the data used to make the chart as an Excel spreadsheet (.xlsx).

Enrolments by Referral Source/Programme

This report provides a table of the number of enrolments and programmes for each referral source.

1. Result filter.
   The '**Referral Source**' drop-down menu can be used to filter to a specific referral source. *View all* is selected by default.

   The '**Start**' and '**End**' fields are used to filter by date range. Clicking either field will display a calendar showing the current month, but it is also possible to manually enter the desired date using dd/mm/yy format.
   - Leave '**Start**' blank to include all available data however old.
   - Leave '**End**' blank to include all data up to the current date.
   - '**Refresh**' is used to apply the current date range and/or referral source selection.
2. Table showing the results. Click the Referral Source link to view the list of registrations that make up the total in the **Enrolments** column for that Referral Source.
3. '**Export**' button — Saves the data used to make the chart as an Excel spreadsheet (.xlsx).

Payment Reconciliation

The Payment Summary lists registrations based on payment type.

Details include:

1. Filters.
   - The '**Start**' and **'End**' fields are used to filter the results by date range. Clicking either field will display a calendar showing the current month, but it is also possible to manually enter the desired date using d/m/yy format.
     - Leave '**Start**' blank to include all available data however old.
     - Leave '**End**' blank to include all data up to the current date.
   - The '**Payment Type**' drop-down menu can filter registrations to a specific payment type.
   - '**Refresh**' is used to apply the current date filter(s).
2. '**Export**' button — Saves the data displayed as an Excel spreadsheet (.xlsx).
3. Results.
   Some details are provided for each registration matching the filters.

Log Files

The Log Summary shows the records of users accessing the system and beginning the registration process.

Details include:

1. Log Filter.
   The '**Start**' and **'End**' fields are used to filter the log by date range. Clicking either field will display a calendar showing the current month, but it is also possible to manually enter the desired date using d/m/yy format.
     - Leave '**Start**' blank to include all available data however old.
     - Leave '**End**' blank to include all data up to the current date.
     - '**Refresh**' is used to apply the current date filter(s).
2. Log entries.
   The following information is recorded for each entry (if/when available):
     - **Start** is the date and time when the user arrived at the VETenrol site.
     - **Name** of the user, as entered by the user to begin the registration.

- **Referrer** (URL used to reach VETenrol)
- **IP Address** assigned to the device used for access.
- **User Agent** provides details on the user's operating system and web browser.
- **Finish** is the date and time when the registration was completed.

3. '**Export**' button — Saves the data displayed as an Excel spreadsheet (.xlsx).

Links

This menu option will display various links available for VETenrol that can be added to your website, or sent to prospective students.

The key elements are:

- The '**Title**' of each link can be clicked to open it in a new tab.
- '**Copy**' places the link on the clipboard so it can be pasted into an email, browser address bar, etc.

See also: URL Querystring Parameters on page 258 regarding formulating your own links.

Additional Support

The following topics are addressed in this section:

For assistance with VETenrol outside the scope of this manual, you may contact VETtrak Pty Ltd using any of the following methods:

- Telephone: 1800 838 872
- Email: support@vettrak.com.au
- Website: http://www.vettrak.com.au

Upgrades & Updates

VETtrak Pty Ltd provides periodic updates for the VETenrol product, which can include:

- Changes for Compliance;
- Utilising newer versions of the Web Enrolment API;
- Compatibility with newer versions of VETtrak; and
- Improvements, additional features and bug fixes.

Clients of the standard VETenrol product, hosted through VETtrak Pty Ltd, will automatically receive updates upon release. A fee applies for VETenrol Self-Hosted clients and while they may be notified of a new release there is no obligation to purchase.

> **NOTE**: If your **VETtrak** is not hosted with VETtrak Pty Ltd, it may become necessary to upgrade it to take advantage of the benefits of new versions of VETenrol. This may also be necessary for future custom work.

Security & Privacy Advice

We recommend the following practices be adopted in relation to VETenrol to assist in protecting the security and privacy of your customers:

- Ensure only a limited number of staff know the password to access VETenrol Client Administration.
- Regularly change your VETenrol Client Administration password.
- Change your VETenrol Client Administration password if a staff member with access leaves your organisation, regardless of when the next scheduled change will occur.

In addition to the above, we also recommend the following for VETenrol Self-Hosted:

- Install and maintain server-grade anti-virus software on your VETenrol server.

These few practices have been recommended as a courtesy and should not be viewed as an all-inclusive solution to the security of VETenrol in your organisation.

A warning regarding Returning Participants feature

Retrieving data from VETtrak to pre-fill the registration form is a great way to speed up the registration process for your customers, however without password protection it requires only the customer's name and date of birth to obtain pre-fill data. This potentially enables another person to assume the customer's identity and view sensitive information regarding the customer, such as home address and contact phone numbers.

Troubleshooting

In the ideal scenario any potential errors or issues, where VETenrol is not performing as expected, would be encountered during testing. However, it may also occur that a client contacts you regarding issues during their registration.

This section covers some issues that may be encountered by you or your clients when using VETenrol and endeavours to provide the most probable solution(s).

Customer Experiences A Session Timeout
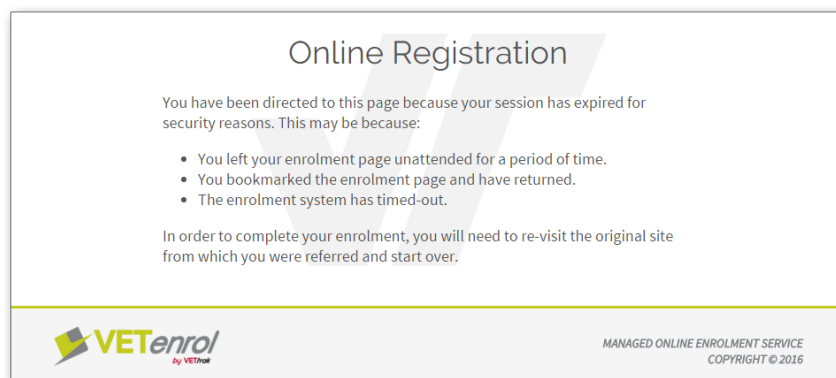
This client issue is straight forward, and is explained within the error message. For security, a client must complete their registration in the one sitting and in a timely manner.

A particular course is not displaying

This type of issue can have a number of causes.

In the case of a newly created course, please try the following:

- Double check the course occurrence has been published for online enrolments.
- Close your web browser, including all tabs and windows, then try again.

If the course was displaying previously:

- Check there are still vacancies for the course.
- Check the enrolment close date has not passed.

> **See also**: Publish for Online Enrolment on page 24

Automated notifications are not being received

If you are not receiving alerts for new registrations:

- Check the email alerts setting is enabled in Client Administration.
- Do you need to update the email address specified for alerts?
- Has your domain changed? If so, you need to notify VETtrak Pty Ltd so the new domain can be permitted to send mail from our mail server.

> **See also**: New Registration Alerts on page 188.

If customers are not receiving notifications:

- Have you updated the email address specified for Client Details in the Client Administration recently?
- Have you tried resending the client their alert notification through the Client Administration? See Registration Details on page 63.

Error Report Emails

If VETtrak Pty Ltd is not hosting your VETtrak, you may be notified of errors via email occasionally. The VETenrol system is designed to identify issues when they occur and produce an automated email so they can be resolved quickly and thus affect a minimal number of your clients.

Any relevant automated emails will be forwarded to you from the support team member on duty.

If this feature has been implemented on your VETenrol Server, you may occasionally receive error messages via email. These are automated notifications designed to identify issues when they occur so they can be resolved quickly and thus affect a minimal number of clients.

Invalid occurrence

This email identifies an issue with a particular occurrence.
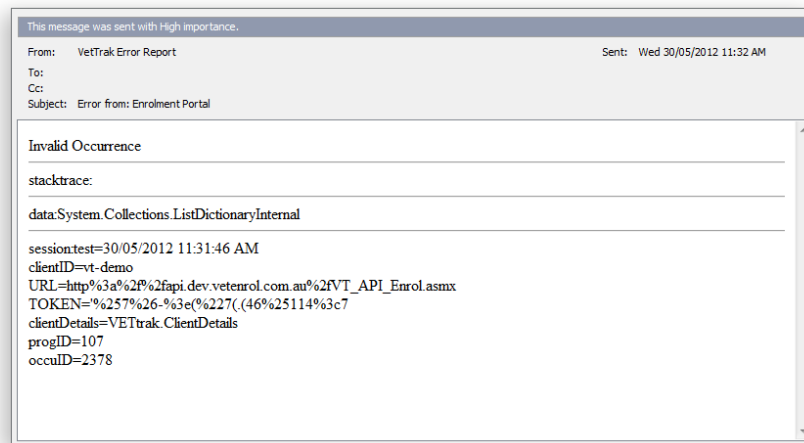
The ProgID and OccuID correspond to the identification numbers found in VETtrak.

This error can be generated due to any of the following:

- The OccuID of a registration link on your organisation's website has been incorrectly entered.
- There are no more vacancies for the occurrence, but a registration link is still accessible from your organisation's website.
- The occurrence has expired, but a link is still available from your organisation's website.

The operation has timed out

This email is created in response to VETenrol not being able to contact the API within an acceptable time frame.
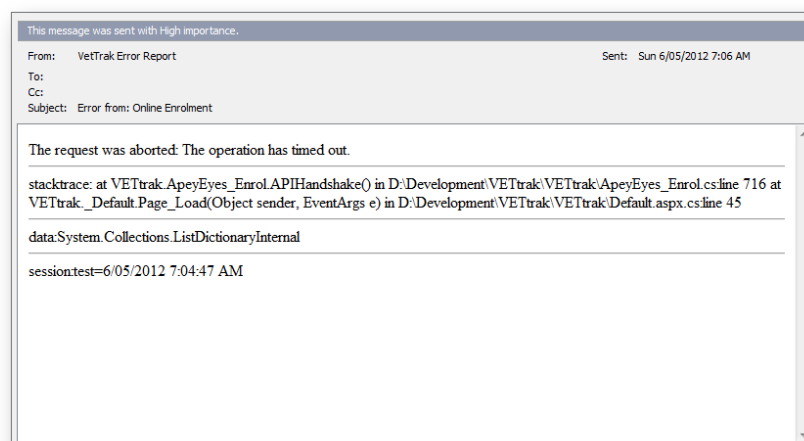
This issue may indicate your VETtrak server requires Internet Information Services (IIS) to be stopped and restarted, or a complete server restart.

Could Not Get Enrolment Key for API
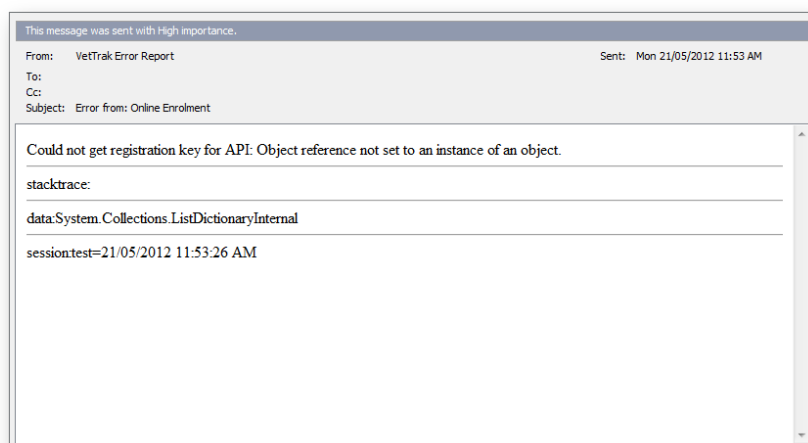
This email identifies an issue with the registration key supplied for the VETtrak API. It is almost always due to the expiry of the enrolment key. Contact OzSoft to renew your licence.

Section 7

Appendices

This section contains additional information relating to VETenrol that is unnecessary for day-to-day operations, but may prove useful on occassion.

The following topics are addressed in this section:

Appendix 1: Price Items

The Price Items assigned to an occurrence are used by VETenrol to determine:

- If an occurrence offers multiple Enrolment Types; and
- The cost total for each Enrolment Type.

This raises several important questions when it comes to Pricing Items and how to set them to ensure VETenrol will function as intended. As such it is important to understand how Pricing Items are handled.

> **NOTE**: Hyphens have a special use for Pricing Item Codes in VETtrak. Do not include hyphens in the code of a Pricing Item unless you intend for that Pricing Item's value to be added with another Pricing Item. This is described in further detail in the topics within this section.

> **NOTE**: If your organisation has only one Enrolment Type, this topic can be ignored.

Enrolment Types

Most organisations have more than one type of enrolment and potentially different prices. VETenrol can cater for more complicated requirements through the use of Pricing Items in VETtrak.

Examples of Enrolment Types could be:

- Fee for Service enrolments;
- Concessional enrolments; and
- State or Commonwealth Government Subsidised enrolments.

Even within an Enrolment Type there could still be different pricing items.

Pricing Item Example

If your organisation allows payments by instalments and only the deposit must be paid up front, a pricing item must be set up for this purpose. For example: if your organisation has a full course fee of $3300 and a deposit of $300 is required, set up the pricing item as follows:

Pricing Item	Description	Code	Cost
Fee for Service	Full cost of the course	CF	$3300
Fee for Service - Pay As You Go	Fee for service cost, deposit amount only	PAYG	$300

Similarly a Pricing Item for concessional enrolments could also be created.

How does VETenrol calculate the total cost for an Enrolment Type?

Each pricing item that has been enabled for the occurrence with a unique code will be identified as an Enrolment Type. Then for each Enrolment Type, the pricing items with related codes and blank codes are aggregated to obtain the total cost.

Pricing items are considered related if they include the unique code of another pricing item followed by a dash and a new code.

Consider the following:

Pricing Item	Code	Description
Standard - Full Fee	FULL	Standard course fees.
Concession Holder	CNC	Course fees discounted for concession card holders.
Membership Card Holder	DSC	Special cost for our members.

The above table contains Pricing Items with unique codes that VETenrol will identify as separate Enrolment Types. In addition to those course fees, the organisation wants to include some other minor fees to cover administrative costs and materials provided during the course, but materials are not charged to members as this is one of the perks of membership.

In this example, minor fees are not to be considered Enrolment Types but instead should be added to the cost of existing Enrolment Types. Therefore the following Pricing Items are added as related Pricing Items:

Pricing Item	Code	Description
Administration Fee		Fee for handling registrations and enrolments.
Materials Fee	FULL-MAT	Standard pricing.
Materials Fee (Concession)	CNC-MAT	Discount pricing for concession card holders.

Now consider that the following costs have been associated with each of the Pricing Items for the occurrence:

Pricing Item	Cost	Pricing Item	Cost
Standard - Full Fee	$ 75.00	Materials Fee (Concession)	$ 10.00
Concession Holder	$ 55.00	Administration Fee	$ 9.00
Membership Card Holder	$ 70.00	Materials Fee	$ 15.00

VETenrol will calculate the following results:

Enrolment Type	Related Pricing Item	Code	Cost
Standard - Full Fee		FULL	$ 75.00
	Materials Fee	FULL-MAT	$ 15.00

	Administration Fee		$ 9.00
		Total:	$ 99.00
Concession holder		CNC	$ 55.00
	Materials Fee (Concession)	CNC-MAT	$ 10.00
	Administration Fee		$ 9.00
		Total:	$ 74.00
Membership Card Holder		DSC	$ 70.00
	Administration Fee		$ 9.00
		Total:	$ 79.00

How are occurrences with multiple Enrolment Types displayed in VETenrol?

Multiple pricing items are displayed within the Course Details of the Occurrence. The Pricing Items are listed alphabetically and a registration button is provided for each one.

The screenshots below allow comparison of a single and multiple Enrolment Types:

Occurrence with a single Enrolment Type (Default)   *An occurrence with multiple Enrolment Types*

Configuring Pricing Items in VETtrak

Pricing Items are set in your VETtrak configuration. You can edit your existing Pricing Items or create new ones for use with VETenrol. The following steps will create a new Pricing Item:
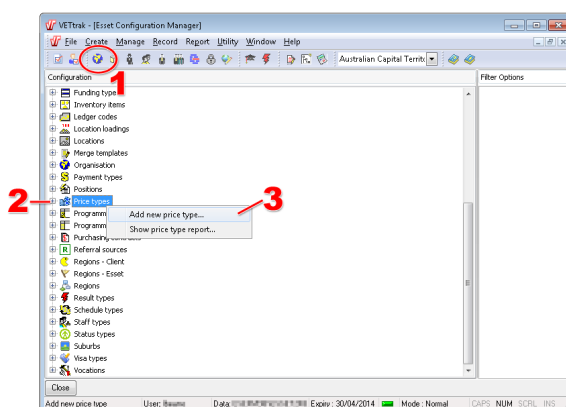
1. Click the 🌐 icon to open Configuration.
2. Locate and right-click '**Pricing Items**'.
3. Select '**Add new pricing item**' from the menu.
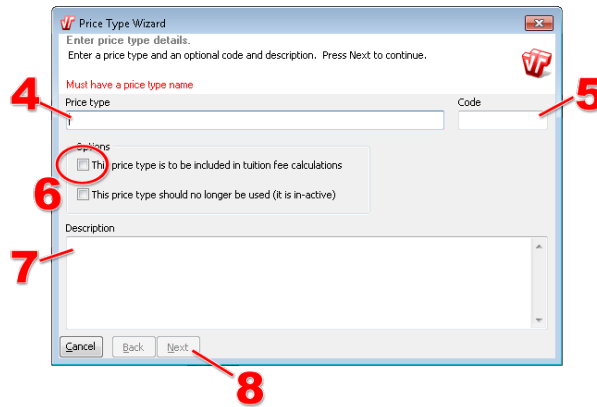
4. Enter a brief name to identify the '**Pricing Item**'. This will be used as the name of the Enrolment Type in VETenrol, if necessary, and should ensure any choices customers must make will be obvious.

5. Enter a '**Code**' or leave it blank if the cost should be applied to every occurrence.

6. If your organisation uses the 'Tuition Fee' button in the Occurrence Enrolment Wizard , enable this checkbox. Otherwise leave it unchecked.

7. Type in further '**Description**' information regarding the Pricing Item if required. This description is not shown to customers.

8. Click the '**Next**' button.
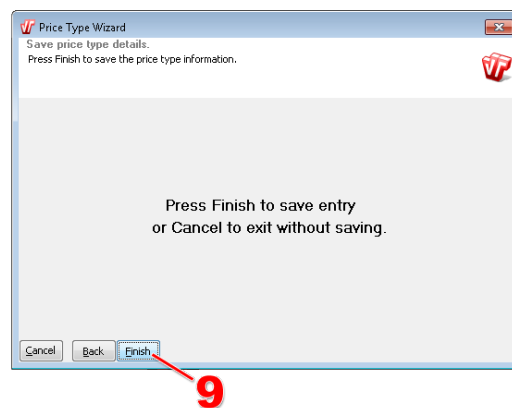
9. Click the '**Finish**' button.

> **NOTE**: Existing Pricing Items can be edited in a similar way. Simply expand 'Pricing Items', then locate and right click the Pricing Item for editing. Then choose 'Edit pricing item...' and follow-on from Step 4 updating the entries as required.

Appendix 2: HTML Code

VETenrol Client Administration allows the customisation of some elements which require HTML code to display as intended. This is typical of fields relating to email notifications and on-screen error text.

Below is a very limited selection of basic HTML tags that can be used to apply simple formatting to text:

- **<h1></h1>** through to **<h6></h6>**
  Heading formatting will be applied to text contained within these elements. H1, 'heading 1', is the largest heading and H6, 'Heading 6', is the smallest.
  For example: <h1>Your Heading Here</h1>

- **<p></p>**
  Paragraph text. Applies standard paragraph formatting.
  For example: <p>This will be a paragraph</p><p>This is will be a new paragraph.</p>

- **** or ****
  Bold formatting will be applied to text contained within these elements.
  For example: <p>This will be a paragraph with the word bold in bold text.</p>

- ****
  Italic formatting will be applied to text contained within these elements.
  For example: <p>This will be a paragraph with the word emphasis in italics.</p>

- **
**
  Inserts a line break.
  For example: <p>This paragraph's next sentence will be on a new line.
This is the new line.</p>

- **<img src="url">**
  Inserts an image.
  For example: <img src="http://vetenrol.com.au/img/VETenrol_Logo.png">

- ****
  Defines a hyperlink (a link to another document).
  For example: Product Brochure
  Including the target attribute allows you to specify where to open the linked document.
  For example: Product Brochure will open in a new browser window or tab.

It is possible to type code directly into fields, particularly when using the tags listed above, but this method relies on knowledge of HTML code and may prove difficult to produce the desired results.

An easier method for producing a customised result is to copy the existing text/code from the corresponding System Default and paste it into a WYSIWYG HTML Editor, where the text can be customised without needing to know any HTML code.

Once the text has been modified and the required appearance has been achieved, view the source code in the editor and then copy only the code contained within the <body> and </body> HTML tags into the appropriate VETenrol Client Administration field and save.

> **NOTE:** We recommend using a WYSIWYG (What-You-See-Is-What-You-Get) HTML editor, such as Trellian WebPage or KompoZer. Additionally, comprehensive HTML tutorials can be found online, such as those at w3schools.

Appendix 3: Image Resources

The following images are available for your usage:

Nationally Recognised Training logo

	Image dimensions 134 x 107 pixels **Image URL** https://enrol.vetenrol.com.au/styles/images/NRT.gif
	Image dimensions 118 x 96 pixels **Image URL** https://enrol.vetenrol.com.au/styles/images/NRT.jpg

Appendix 4: Special Variables

VETenrol stores some commonly used text in special variables for convenience. The use of those variables in customised HTML code or automated email notifications allows changes to be made to Settings such as phone number and have those changes carry through without needing to re-edit code.

Enter the special variable into your code like a place holder and it will be replaced with the associated text when the HTML is generated.

On-Screen Agreements
The following special variables are only applicable to the custom fields available on the Agreements screen of the Client Administration Interface.

- *RTOEMAIL*
  Your organisation's email address, as entered in General Settings.
- *RTONAME*
  Your organisation's name, obtained from General Settings.
- *RTOPHONE*
  Your organisation's telephone number, as entered in General Settings.

Email Notifications (Staff & Client)

The Subject line, body and EFT Sections can contain the following special variables:

- *ADDRESS*
  Customer's complete address, as supplied during registration.
- *CLASSESTABLE*
  Displays a list of classes for the course.
- *CONTACTDETAILS*
  Your organisation's contact information, as set in General Settings. It is also possible to access individual address elements for the confirmation email to customers, which may be useful If you wish to change the order in which the address is presented for the email.
    - *RTONUMBER*
    - *ADDRESS1* for address line 1.
    - *ADDRESS2* for address line 2.
    - *CITY*
    - *STATE*
    - *PCODE*
    - *PHONE*
    - *FAX*
    - *EMAIL*
- *CONTACTNAME*
  The name of your organisation, obtained from General Settings.
- *COST*
  Total amount the customer must pay.

- *DATE*
  Current date as at the generation of the email.
- *EFTAccount*
  Bank Account Number, obtained from General Settings.
- *EFTAccountName*
  Bank Account Name, obtained from General Settings.
- *EFTBSB*
  BSB Number for your organisation's bank account, obtained from General Settings.
- *NAME*
  Customer's full name as supplied by the customer during registration.
- *GIVEN*
  The customer's first name only, as supplied during registration.
- *OCCUID*
  Occurrence Identification Number, corresponding to the occurrence within VETtrak.
- *OCCUDATE*
  The start date for the occurrence.
- *PROGRAMMENAME*
  The name of the course as set in VETtrak.
- *RECEIPTNUMBER* or *EFTReference*
  A receipt number for reference, composing of the OccuID and a unique sequential number.

> **NOTE** : These special variables do not apply to the Email Templates feature. Variables/placeholders available for mail templates can be inserted into the message body from the drop-down menu in the Mail Template Details section.

Appendix 5: URL Querystring Parameters

These parameters are added to the end of a VETenrol link to control various style options. The first parameter must be preceded by a question mark (?) and all subsequent parameters with an ampersand (&).

For example:

- A URL with one parameter
  https://enrol.vetenrol.com.au/?clientID=VT-DEMO
- A URL with three parameters
  https://enrol.vetenrol.com.au/?clientID=VT-DEMO&progID=13&altCSS=1

The following querystring parameters are applicable to your VETenrol:

ClientID
Indicates which organisation's VETenrol settings should be used. This parameter is required for all links.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO

> ⓘ The ClientID parameter is not applicable to Self-hosted clients.

altCSS
Applies an alternative style sheet (if it exists) changing the site layout.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&altCSS=1

uiSettings
Hides various design elements for the site according to the following table:

> ⓘ Some uiSettings may not work due to branding applied to the VETenrol account. These parameters are not supported by the Rapid Courses page and registration process

uiSetting	Result

1	Hide the company logo
2	Hide the programme list
4	Hide the Contact details
8	Hide the Footer
16	Hide the Navigation Bar
32	Hide the Course description
64	Hide the classes link for occurrences
128	Hide the Units link for occurrences
256	Hide the Vacancies for occurrences
512	Hide the Start Date
1024	Hide the breadcrumbs
2048	Hide the enquiry form
4096	Hide the Cost
8192	Enable the Prior Enrol feature
16384	Hide the Location (also requires OccuID to be specified)
32768	Hide the Start Date (also requires OccuID to be specified)

Adding values together will hide multiple elements:

31	Hides each of the uiSettings 1, 2, 4, 8, and 16.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&uiSettings=1

sap
Show all programmes. Requires either true or false, which is case-sensitive. Overrides the Client Administration setting.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&sap=false

sao
Show all occurrences. Requires either true or false, which is case-sensitive. Overrides the Client Administration setting.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&progID=13&sao=true

ProgID
Selects the programme(s) to display. Multiple IDs must be comma separated. Programme IDs are obtained through the Programmes menu item in the Client Administration.

If you would like to experiment with VETtrak Pty Ltd's demo site, the following progIDs are applicable:

progID	Course Name
13	Basic Computers
17	Cert III Aged Care
84	Cert II Open Cut
96	First Aid Training
107	Cert III Pathology

Example usage:

- A link with a single programme ID
  https://enrol.vetenrol.com.au/?clientID=VT-DEMO&progID=17
- A link with multiple programme IDs
  https://enrol.vetenrol.com.au/?clientID=VT-DEMO&progID=13,96

OccuID

Selects an Occurrence to display. Only a single Occurrence can be passed, and it cannot be used together with progID parameter. Occurrence IDs are obtained from VETtrak, or through the Programmes menu item in the Client Administration.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&occuID=2078

> **NOTE:** Our demo occurrences expire regularly, however the link should work until all vacancies are filled. This is due to the *Allow enrolment in expired occurrences* setting.

PriceID

Selects the price type to use when registering in a specific occurrence. Price IDs are obtained through the Programmes menu item in the Client Administration.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&occuID=2078&priceID=16

> **NOTE:** Our demo occurrences expire regularly, however the link should work until all vacancies are filled. This is due to the *Allow enrolment in expired occurrences* setting.

Group

Indicates if the registration should be for a group booking. Requires any value to be enabled (use of 1 or true recommended).

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&occuID=3398&group=1

NOTE: The occurrence must be published in VETtrak with employers allowed to enrol.

Bypass
Ignores the Close Date, allowing users to register between the Registrations Close date and the course start date.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&bypass=[occuid]

Hidreferralsource
Pass a referral source ID to identify the referral source for the registration. Hidden Referral Source must be enabled for your VETenrol account, and if this is the case there will be a Referral Source Summary under Reports where the IDs can be obtained.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&hidreferralsource=[id]

page
Redirects to non-standard page.

Page	Result
calendar.aspx	Opens the basic calendar with the category view.
categoryview.aspx	Lists programmes grouped by their VETtrak programme type.
completeregistration.aspx	Allow client data collection against an existing VETtrak enrolment. The eID parameter must also be supplied.
courses.aspx	Course list intended for iFrame implementations (also utilised by Rapid Registrations).
eligibility.aspx	Opens an eligibility form (requires additional parameters).
enquiry.aspx	Opens the enquiry form.
history.aspx	Presents a user's education history, if a match is found in VETtrak.
kalendar.aspx	Opens the advanced calendar with the course list.
register.aspx	Alternative for registering in individual classes, rather than the default occurrence level registration.
registerRapid.aspx	Invokes the Rapid Registration process. Requires the OccuID parameter.
schedule.aspx	Lists courses grouped by location (state/territory).
search.aspx	Opens the Search page.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=calendar.aspx

> **NOTE**: The Calendar needs to be activated by VETtrak Pty Ltd.

Rapid

This triggers the rapid registration process for the schedule page.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=schedule.aspx&rapid=1

Limit

This is a Courses page only parameter, meaning the Link must include the page=courses.aspx parameter. A ProgID is also required.This sets the maximum number of occurrences (instances of a specific course) to display on the page. Limit requires a number value of 1 or more.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=courses.aspx&progID=96&Limit=2

Location

This a Courses page only parameter, meaning the Link must include the page=courses.aspx parameter. A ProgID is also required. This will restrict the list of occurrences to only those with matching location text.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=courses.aspx&progID=96&Location=Perth

eID

This is an Eligibility Calculator only parameter, meaning the Link must include the page parameter. The eID requires an Eligibility Form ID.

ID	Eligibility Form Name
1	NSW Smart & Skilled
2	ACT Skilled Capital
3	Qld User Choice, Cert 3 Guarantee, Higher Level Skills
4	South Australia WorkReady
5	Western Australia Future Skills
6	Victorian Skills First

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=eligibility.aspx&eID=1

yes & **no**
These parameters are for the Eligibility Calculator only. The link must include page, eID, and OccuID. Both yes and no parameters require a price ID number (representing the pricing item) to be used for an Eligibile (yes) or ineligibile (no) outcome.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=eligibility.aspx&eID=1&occuID=3395&yes=45&no=22

Rapid
This triggers the Rapid Registration process for the Schedule page.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=schedule.aspx&rapid=1

txtGivenName, **txtSurname**, **txtDOB**

These parameters can be used to pre-fill the Given Name, Surname and Date of birth fields of the registration process.

Example: https://enrol.vetenrol.com.au/?clientID=VT-DEMO&txtGivenName=Test&txtSurname=Only

txtUsername
This parameter can be used to pre-fill the Returning Participant details. The feature must be enabled, however it is incompatible with the *Allow "Easy" returning participant* option.

txtClientCode
This parameter can be used to pre-fill the Returning Participant details if the *Allow "Easy" returning participant* option is enabled.

 See also: Personal Step on page 143 regarding the Returning Participant feature.

Appendix 6: Creating Website Links

Links to VETenrol can be implemented to take customers to the following entry points:

- The course selection screen — This is the default entry point, where customers must first choose the course they are interested in.
- A specific course — This type of link provides access to all available occurrences for a specific course.
- An occurrence — This type of link takes the client directly to the first step of the enrolment process.
- The calendar — An alternative entry point to the course selection screen.
- Search — An alternative entry point to the course selection screen.
- The Eligibility Calculator — An entry point that precedes the course selection screen and can determine eligibility for specific funding sources.

A combination of the above can be used throughout your organisation's website if required.

> **NOTE**: Use of the course and occurrence specific links introduces a higher risk of human error as those links require manual entry of identification numbers obtained from VETtrak and then must be closely managed.

> **ATTENTION**: If you (or your web designer) intends to link to VETenrol through an iFrame or Frameset, please see topic Frameset Embedded on page 134 to enable cross-browser compatibility.

> **See also**: URL Querystring Parameters on page 258 regarding additional linking features.

Linking to the Course Selection Screen

This linking method is recommended by VETtrak Pty Ltd as it requires little to no maintenance once the link has been included on your organisation's website.

The link is simply the URL to the VETenrol server followed by ?clientID= and your ClientID exactly as displayed in your Client Administration Settings.

For example: http://enrol.vetenrol.com.au/?clientid=VT-DEMO

Linking to a Specific Course

A link to a specific course is most logically included on pages in your organisation's website which provide details on a course offered. The enrolment link will then take clients to a list of dates and locations when the course is occurring.

The link used in this case is the VETenrol URL with your client ID, as per the example in Linking to the Course Selection Screen then &progID= and the programme ID for the course appended to the address. Programme IDs can be obtained through the Client Administration as described in the topic: Summary Report on page 101.

For example: http://enrol.vetenrol.com.au/?ClientID=VT-DEMO&progID=96
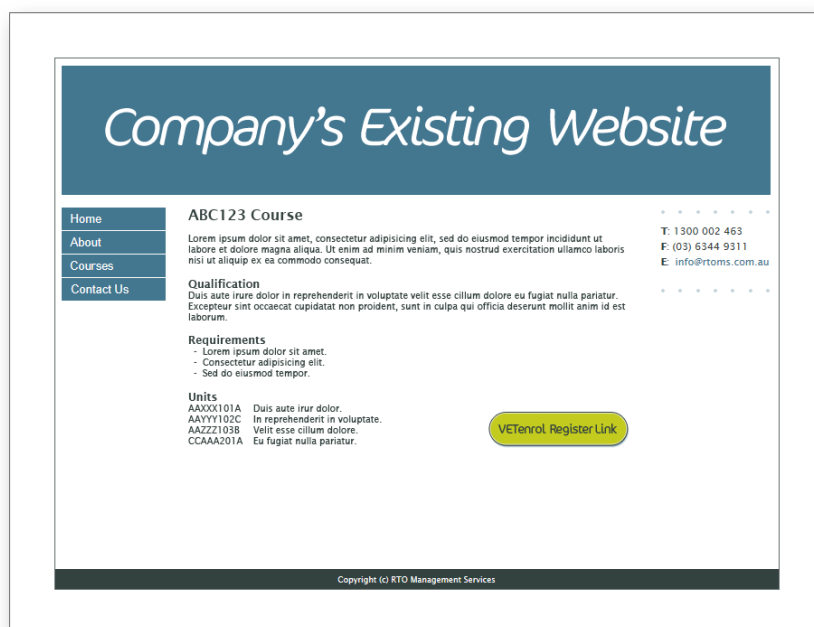
Sample of an organisation's website utilising a specific course link.

> 🖉 **NOTE:** A specific course link will continue to function for as long as there is at least one occurrence available for registration.

Linking to an Occurrence

Links to occurrences could be included on pages in your organisation's website which provide details on the course offered and also list the dates and locations.

The link used is the VETenrol URL with your client ID, as per the example for Linking to the Course Selection Screen on page 264, then &occuID= and the Occurrence ID for the course instance appended to the address. Occurrence IDs can be obtained from VETtrak or through the Client Administration as described in the topic: Summary Report on page 101.

For example: http://enrol.vetenrol.com.au/?ClientID=VT-DEMO&occuID=2618

Sample of an organisation's website utilising occurrence links.
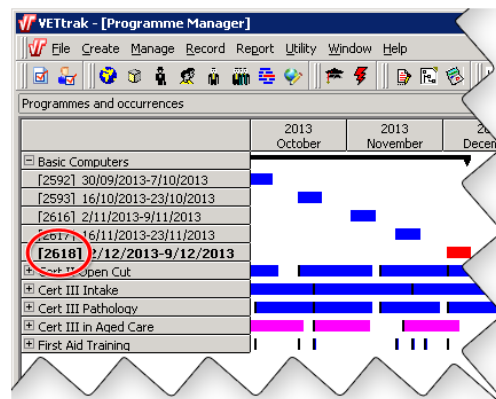
OccuID in VETtrak

> **NOTE**: An occurrence specific link works only while that particular occurrence is valid, thus the link will display an error if there are no more vacancies, or the enrolment close date has passed. The Client Administration setting, Enable Prior Enrol on page 120, can negate this if enabled.

Linking to the Calendar

This linking method provides an alternative to the VETenrol Main screen, where courses are selected.

The link for the *basic calendar*, which includes the category view, is the URL to the VETenrol server followed by ?clientID= and your ClientID exactly as displayed in your Client Administration Settings and then &page=calendar.aspx.

For example: http://enrol.vetenrol.com.au/?clientid=VT-DEMO&page=calendar.aspx

The link to the *advanced calendar*, which includes the course list, is the URL to the VETenrol server followed by ?clientID= and your ClientID and then &page=kalendar.aspx

For example: http://enrol.vetenrol.com.au/?clientid=VT-DEMO&page=kalendar.aspx

See also: URL Querystring Parameters on page 258 for more on linking to the calendar and Calendar on page 31 regarding the customer experience.

Linking to Category View

This linking method provides an alternative to the Course Selection screen. Featured as part of the basic calendar, there is also a stand-alone version. The Category View is suitable for those wanting to show their course offering in groups. Courses are listed based on the programme type assigned in VETtrak.

The link is the URL to the VETenrol server followed by ?clientID= and your ClientID exactly as displayed in your Client Administration Settings and then &page=categoryview.aspx.

For example: http://enrol.vetenrol.com.au/?clientid=VT-DEMO&page=categoryview.aspx

See also: URL Querystring Parameters on page 258 for more on linking to the Category View page.

Linking to the Schedule

This linking method provides an alternative to the Course Selection screen. Courses are displayed in a table and grouped by state. It is ideal for those offering multiple courses across different states.

The link is the URL to the VETenrol server followed by ?clientID= and your ClientID exactly as displayed in your Client Administration Settings and then &page=schedule.aspx.

For example: http://enrol.vetenrol.com.au/?clientid=VT-DEMO&page=schedule.aspx

See also: URL Querystring Parameters on page 258 for more on linking to the Schedule.

Linking to Search

This linking method provides an alternative to the Course Selection screen. Users can search for a course as well as browse the available courses.

The link is the URL to the VETenrol server followed by ?clientID= and your ClientID exactly as displayed in your Client Administration Settings and then &page=search.aspx.

For example: http://enrol.vetenrol.com.au/?clientid=VT-DEMO&page=search.aspx

> See also: URL Querystring Parameters on page 258 for more on linking to the Search page and Search on page 35 regarding the customer experience.

Linking to an Eligibility Form

This linking method provides an entry point that precedes the Course Selection screen. The Eligibility Calculator prompts users to complete a series of funding eligibility questions before registering. The link can be formed so that result appropriate pricing is selected for registering.

> This is an advanced topic that may include concepts unfamiliar to those new to VETenrol.

> See also: Eligibility Builder on page 222 for the simplified method of creating an eligibility link provided via the admin.

In its most basic state, the link is the URL to the VETenrol server followed by ?clientID= and your ClientID, then &page=eligibility.aspx and &eID=x. The x must be replaced with a valid eligibility form ID.

ID	Eligibility Form Name
1	NSW Smart & Skilled
2	ACT Skilled Capital
3	Qld User Choice, Cert 3 Guarantee, Higher Level Skills
4	South Australia WorkReady
5	Western Australia Future Skills
6	Victorian Skills First

The Eligibility Calculator permits the following scenarios:

- **Form Only**
  This is scenario in which the link has only the basic details, as per the above example.
  http://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=eligibility.aspx&eID=1

  The user can complete the form, but they need to select the programme and occurrence

themselves. Eligibility Results are recorded with their registration providing the registration is completed during the same session as the Eligibility form was completed (ie. they complete the eligibility form and then register straight after).

In this case Eligibility outcome results cannot be used to determine pricing as this information has not been passed.

- **Specific Programme only**
  In this scenario, the link has the basic details plus &progID. In this case Eligibility outcome results cannot be used to determine pricing as this information has not been passed.

  The following example identifies the demo Cert III Retail programme :
  http://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=eligibility.aspx&eID=1&progID=108

  The user completes the form, but must choose an occurrence themselves. They will only be presented with occurrences for the preselected programme (this would be Cert III Retail in the example). The user's Eligibility outcome results are recorded with their registration providing Eligibility and registration are completed during the same session.

- **Specific Occurrence**
  In this scenario, the link includes the basic details plus &occuID. In this case Eligibility outcome results cannot be used to determine pricing as this information has not been passed.

  The following example identifies a specific occurrence in the demo Cert III Retail programme:
  http://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=eligibility.aspx&eID=1&occuID=3424

  The user completes the form, but must choose an occurrence themselves. They will only be presented with occurrences for the preselected programme (this would be Cert III Retail in the example). The user's Eligibility outcome results are recorded with their registration providing Eligibility and registration are completed during the same session.

- **Specific Occurrence with result based Pricing Selection**.
  In this case the link contains all applicable data. It includes the basic details, the occurrence ID, and the pricing selection for both the eligible and ineligible result. In this case Eligibility outcome results will determine the correct pricing for the user.

  This example is for the demo Cert III in Aged Care:
  http://enrol.vetenrol.com.au/?clientID=VT-DEMO&page=eligibility.aspx&eID=1&occuID=3427&yes=45&no=22

  The yes and no represent which pricing to apply based on the user being eligble for funding or not eligible. The numbers are pricing IDs for the applicable pricing items (ie. the pricing ID entered for no would generally be for the full course price).

> **NOTE**: To use pricing IDs in your links you must have added multiple Pricing Items to the published occurrence in VETtrak. The Pricing ID for those items can be seen via the Summary Report.

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> See also: URL Querystring Parameters on page 258 for more on linking to the Search page and Eligibility Calculator on page 36 regarding the user experience.

Appendix 7: Linked Occurrences

> NOTE: The Linked Occurrences feature is NOT related to Linked Enrolments in VETtrak.

Linked Occurrences allows a single occurrence to be tied to multiple additional occurrences so that when a user registers for the main occurrence, they will be automatically registered for each of the occurrences that are linked to it.

Key points regarding this feature:

- All occurrences, the main and each linked occurrence, must be published for online enrolment in VETtrak for the feature to function as expected.
  - In cases where it is not desirable for the linked occurrences to accept registrations themselves, they can be hidden using the List Exclusions feature.
- The user will not know they are being registered into multiple occurrences, so the main occurrence should make this clear in some way.
  - The main occurrence could belong to an aptly named programme, such as "Dual qual...", "First Aid & CPR Combined Special", or similar.
  - Advice can be included in the *Description* for the programme in VETtrak, if VETenrol is set to display the Programme Description.
  - Advice can also be included in the *Description* for the main occurrence in VETtrak, if VETenrol is set to display the Occurrence Description. This is a better option if the occurrence is part of a programme where not all of the listed occurrences are linked.
- The user will only be charged the price set for the main occurrence, regardless of how many occurrences are linked to it and what prices have been set for those. Pricing set on a linked occurrence will be utilised if a user registers directly for that occurrence.

> *Linked Occurrences* is applicable to standard registration process for individuals. It is not intended for use with Rapid Registrations or Group Bookings and should not be attempted with either of these processes. Additionally, *Linked Occurrences* are not compatible with the account setting Post-Payment Push.

> *Linked Occurrences* is not enabled by default. This feature is available by request, so please contact Support if you would like to use it.

When the Linked Occurrences feature is enabled for your account it will be available via **Programmes** > **Linked Occurrences**.

The Linked Occurrences screen has two key elements:

- The Occurrence section — used to create, or modify an occurrence.
- The Occurrence list table — for managing existing linked occurrences.

Occurrences in the list table can be:

- Modified by clicking the occurrence ID.
- Assigned occurrences to be linked by clicking the '**Edit**' link.
- Removed from the list by clicking the corresponding '**delete**' link.

> **NOTE**: The Exclusions List table will not be displayed if there are no exclusions.

Creating a linked occurrence

To Create a linked occurrence:

1. Type the '**Occurrence ID**' in the field provided. This is the main occurrence.
2. Click the '**Save**' button.

The newly created record will be added to the Occurrence List table.

3. Click '**Edit**' in the Linked column of the table.

This will open a new screen for linking occurrences to the original:

4. Type the '**Occurrence ID**' in the field provided. This is for an occurrence in which users will be automatically registered when they register in the original occurrence.
5. Enter the '**Price ID**' to identify the pricing to be applied for the automatic registration.
6. Click the '**Save**' button.

The newly created record will be added to the Linked list table.

Now that the occurrence has been linked:

- Repeat steps 4 - 6 to link additional occurrences.OR
- Click the '**Back**' button to return to Linked Occurrences.

> NOTE: The main occurrence and all occurrences linked to it must be published for online enrolment in VETtrak. The linked occurrences not intended for direct registration can be hidden from view using List Exclusions.

> NOTE: The user will not know they are being registered into multiple occurrences, the main occurrence should make this clear.

> See also: List Exclusions on page 84 for details on how occurrences can be hidden.

Appendix 8: Deferred Payments

Deferred payments allow registrations to be received without payment. The appropriate pricing can then be determined and the customer emailed to make the payment. This feature may be applicable to RTOs that want to assess eligibility or membership prior to providing students with a price.

> ⓘ   This is a **feature by request**, please contact **Support** to have this feature enabled for your VETenrol account. A payment gateway integration is required to use this feature.

> ☑   **NOTE**: Deferred payment applies to all registrations. There will be no payment options available during the registration process. Relevant payment options that are enabled will be offered to the student during the *Pay Now* process.

- The **Change** link will allow a new payment type to be selected.
- The **Pay Now** link will open the Email Client dialog so the customer can be emailed from a template.

> 🧩   **See also**: Pay Now on page 46 for details on the user experience. Creating a Template on page 206, and Emailing the client (from a template) on page 65.

Changing pricing

By clicking the **Change** link for the Payment Details, you can set a price for the customer before they are requested to pay.

1. Select the **Price Name** from the list. These are the pricing items set in your VETtrak.
2. Click the **Save** button.

The registration will be updated with the new cost and the customer can be emailed to make the payment.

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Appendix 9: Pay Now - Pending payment follow-ups

Users that have fully entered their registration details, but did not provide their credit details to properly complete the registration, can be emailed regarding their non-payment.

Requirements for using this feature:

- Credit Card payments enabled in your VETenrol.
- An email template with the type *Pay Now*.
- A registration with the *Payment Status* of "Pending Payment", or "Deferred Payment".
- The Web Enrolment in VETtrak should not yet have been processed.

Following up on a registration without a payment

Email the user via the Registrations or Registration Details page, using the icon.
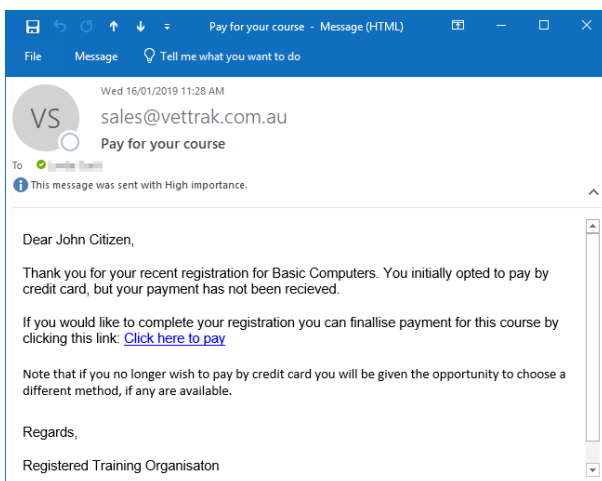
The icon is located on the left in the Contact Detail section.

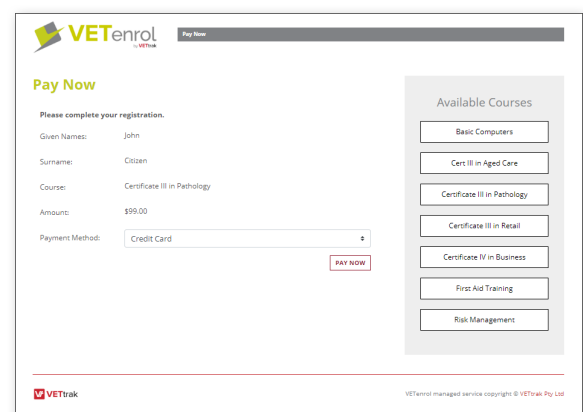- Click the email icon near the customer's email address.

This will open the Email Client where you can select a suitable Pay Now template and send the email.

The email contains a link that allows the user to complete the final payment step for their registration.

Sample of possible text from a template.

User experience

When a user pays, the registration record in your Admin will be updated to reflect the changes.

> NOTE: On successful payment, VETtrak will automatically updated with the payment information providing the Payment Setting Send payment details to VETtrak is enabled.

Appendix 10: Award Verification Service

The Award Verification Service retrieves certificate and statement of attainment information from VETtrak. It provides two levels of service, automated and manual.

The automated service provides verification of awards based on QR Codes scanned from a user's mobile phone or device, which automatically redirects and presents the verification results. In contrast, the verification can be done manually, but requires the user to navigate to the Award Verification Service page and enter the required details to verify the award themselves.

The following manual process also depicts the equivalent entry point(s) for the automated process on the right.

TOP: *The user enters their name and parchment ID, then clicks the Verify button.*

TOP RIGHT: *The user's details are compared against the organisation's VETtrak Database and returns the details of the award if a match is found.*

RIGHT: *If there is no match, or the award is not published, an error is returned to the user.*

Set-up and Requirements for AVS

In order for VETenrol to successfully retrieve award details, the **Available for verification** checkbox in the VETtrak Award Wizard must be ticked.

If this checkbox is not ticked, users will be able to enter the correct credentials to retrieve the information, but still receive an error.

Requires VETtrak 20.3
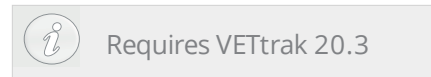
In addition to the requirement for awards to be available for verification, there are some other considerations for the service:

| Automated	Manual
• QR Codes must be incorporated into existing award reports and self-service reports. • Only awards issued with the QR Code embedded can make use of the automated service level.	• A link to the AVS page must be added to your website, or otherwise made available to users in some way. • Awards issued in the past can still be verified, if the award is set to be available for verification in VETtrak.

QR Codes for Reports

Your awards within VETtrak can be updated by completing a Support Report Request, or via Self-Service Reports Version 1502 (VETtrak version 20.3.0.1 and above), to include a QR Code for the Award Verification Service.

The QR Code contains the information to automatically verify the award without requiring the user to enter any details. Users will need a suitable App to read the QR Code on their device.

When creating or editing an existing Self-Service Report, the QR Code for VETenrol is available as a report element and can be placed onto the report.
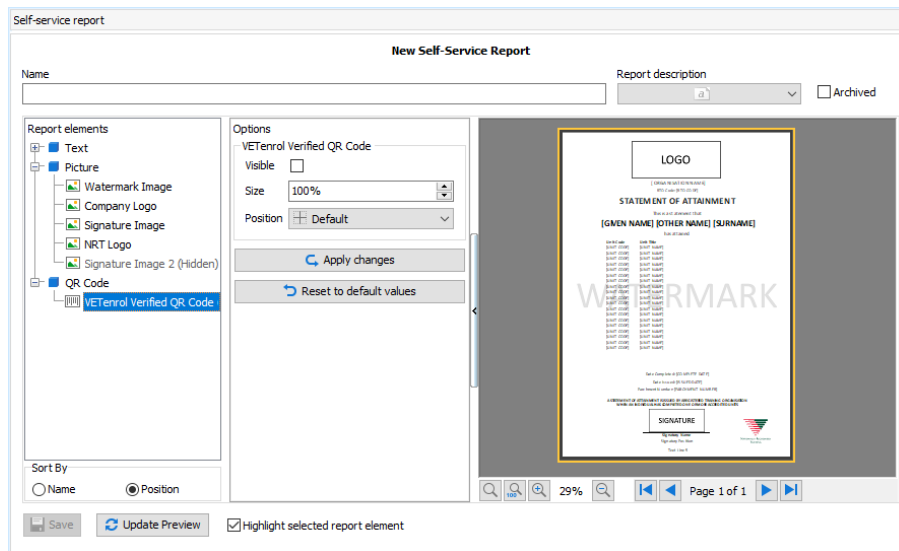
From the list of *Report elements*:

- Expand **QR Code**.
- Select the **VETenrol Verified QR Code** element.
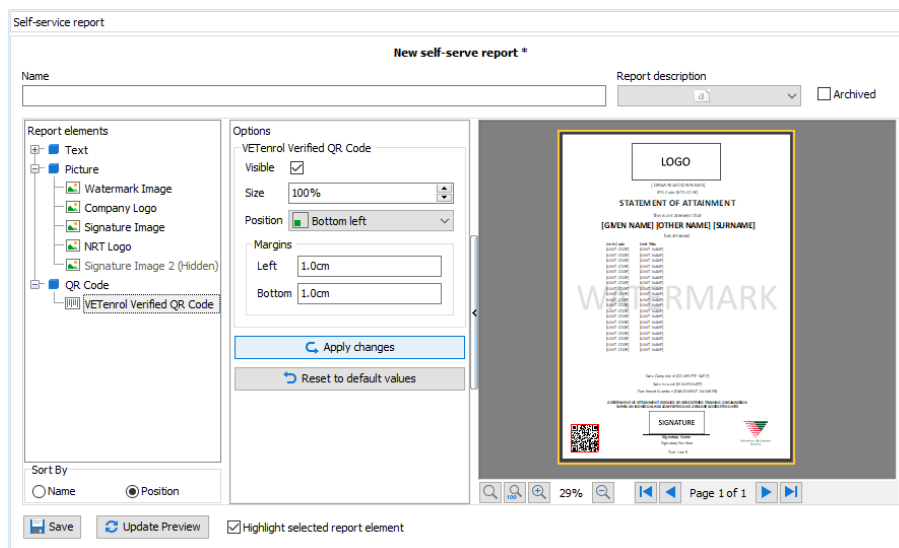
From the Options:

- Tick the **Visible** checkbox.
- Choose a **Size** and **Position** suitable for the chosen report.
- Click **Apply** changes.
- **Save** the report.

See also: Help Centre article on Creating a Self-Service Report.

Linking to the Award Verification Service
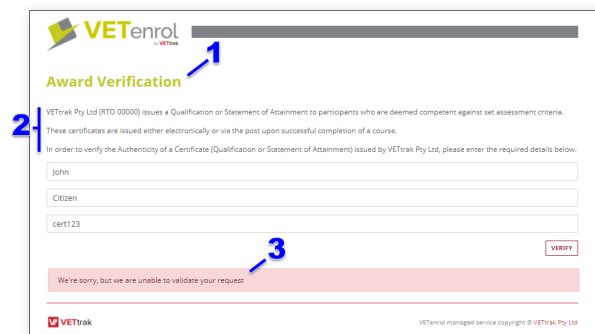
You can provide a direct link to users from your website.

Example: https://enrol.vetenrol.com.au/VerifyAward?clientID=VT-DEMO

The Client ID should be changed to match your own VETenrol account Client ID.

Settings

Settings for the Award Verification Service are available from the Admin via the *Settings > Award Verification Settings* menu item.

These settings provide control over the content presented to users of the Award Verification Service.

1. **Heading** — The page heading.
2. **Blurb** — The introductory text for the service.
3. **Error Text** — The message displayed to users when the details provided by the user do not match an award.

The system defaults will be used if the settings are left blank.

Appendix 11: Adobe Sign Integration

VETenrol is compatible with the Adobe Sign service, providing functionality to request signatures for documents direct from VETenrol Registration Details. VETenrol pre-fills documents for signing with data collected through the registration process and maintains links to signed documents. Integration does not impact the VETenrol registration process for customers.

The integration offers the following features:

- Send documents for signing direct from a customer's Registration Details in the VETenrol Client Admin, where it also becomes possible to obtain:
  - Document history, certified by Adobe Sign.
  - Signed copies of document(s).
- Sent documents are pre-filled with data captured during the registration process.
- Automated emails, as provided by Adobe Sign, are sent to the Adobe Sign account holder and to the customer's email address.
- Adobe Sign Summary available from the Report menu of the VETenrol Client Admin, which identifies outstanding unsigned forms.

Once integrated, Adobe Sign functions are available from the Registration Details screen of VETenrol. The Adobe Sign section is displayed on the right, near the top of the page, and contains a list of documents available for signing:


- Click the '**Request Signature**' button.

You will be prompted to confirm the action:
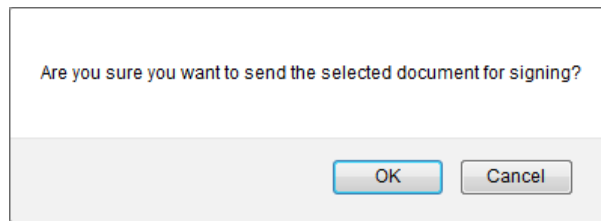
- Click the '**OK**' button to proceed. This will send automated emails to the customer (requesting signature) and to the Adobe Sign account holder (advising a signature has been requested).

- The **Echo Sign** section will update to display the status of the requested document.
  - The '**Pending signature**' link will open a PDF of the document history.
  - The **X** icon will delete the request and email the customer advising of the cancellation.
- Once the signature has been obtained the section will update again (upon next visit or refresh):
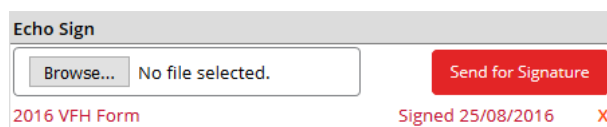
- A copy of the signed document can be obtained by clicking the form name link.
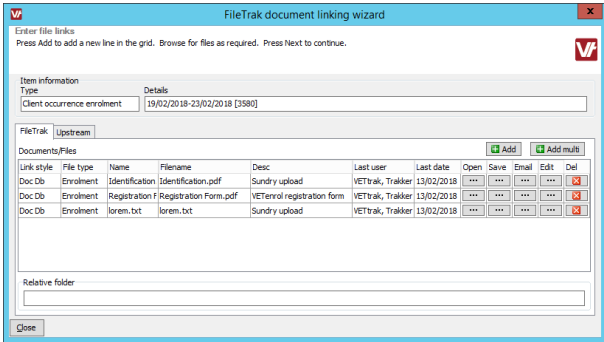- The Document History can still be viewed (as a PDF) by clicking the status, '**signed <date>**'.
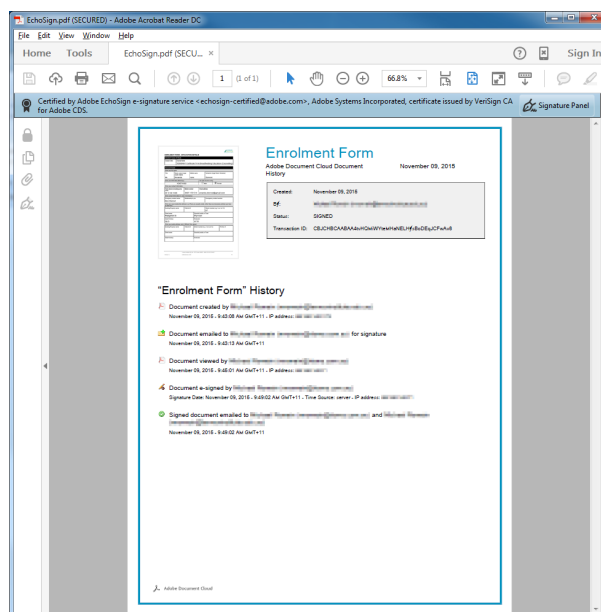
> **NOTE**: If you wish to enable this service for your VETenrol, please contact Support. You will need to supply your Adobe Sign API Key and the forms you wish integrated.

Appendix 12: VTDocs Integration

The VTDocs Integration allows VETenrol to upload any documents submitted as part of the registration process to the VTDocs database. From then on any documents will appear against the client's enrolment in VETtrak.

There are multiple ways to access the documents via VETtrak, here is one example:

Process the enrolment from Manage web enrolments.

Search for the client, then right click on the enrolment and choose Edit enrolment.

Click the [ ] button in the bottom right corner of the dialog box to open the wizard depicted on the left.

The integration is available to clients that host their database withVETtrak Pty Ltd.

Once VTDocs and the VTDocs API have been enabled by VETtrak Pty Ltd Support for your hosting account, there are some steps required for action at your end.

Update your licence key

In VETtrak:

* Choose *File > Global Preferences*.
* Select *Registration Key* on the left.
* Click *Update Key Automatically*.

> 📝 **NOTE**: A message saying the key is already up-to-date indicates this step has already been done.

Create a new user
It is recommended that a new user be created for the purpose of authenticating with VTDocs.

In VETtrak:

* Choose **Create** > **Client** from the menus (or press CTRL + F7 on your keyboard).

- Enter a **Surname**, eg. Auth.
- Enter a **Given name**, eg. VTDocs.
- Select **Division** (only if required).
- Tick the **Is a staff member** option.
- Click **Next**.

- The **Username** and **Password** fields will have been pre-filled when the surname was entered. These can be changed, or you can keep the generated ones.

  Make note of the Username and Password, as the password will be hidden once the wizard is complete. You will need these credentials to login to VTDocs to complete the password change that is required if User must change password at next login is enforced. This should be done before entering any credentials into your VETenrol account.
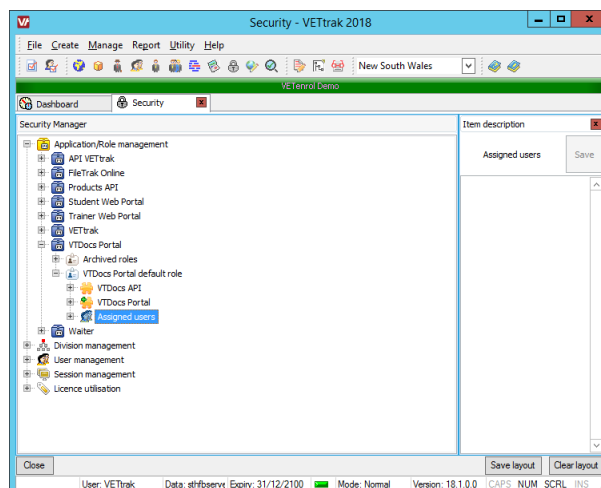
- Tick the *VTDocs Portal* option for **Web portal access**. Untick all other options ticked by default.
- Click the **Finish** link in the breadcrumbs to skip to the final step.
- Untick **Edit personal information for this client**, then click **Finish**.

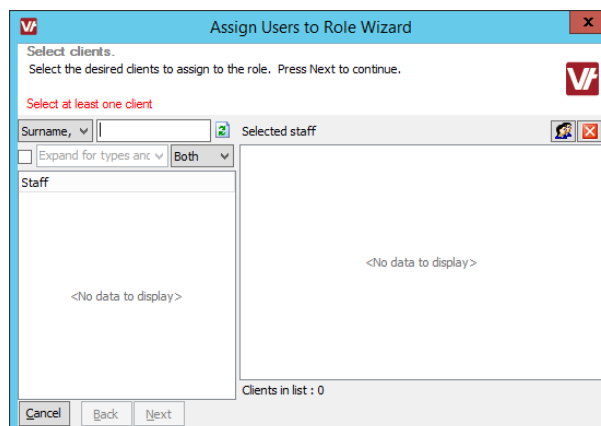**Assign the user to the role in the Security Manager**
This will provide access to VTDocs.

In VETtrak:

- Choose *Manage > Security*.

- Expand the **VTDocs Portal** tree.
- Expand the **VTDocs Portal default role**.
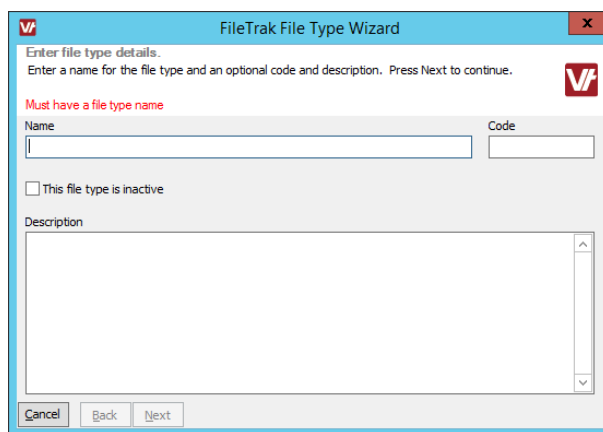- Right-click **Assigned Users** and choose *Assign users to role*.

- Add the user with the name VETtrak API to this list.

Create a suitable FileTrak File Type

In VETtrak:

- Choose *Manage > Configuration*.
- Right-click *FileTrak file types* and choose *Add new file type*.

- Enter the **Name**.
- Optionally, enter a **Code** and a **Description**.
- Click **Next** and **Finish**.

This newly created file type needs to be fetched and saved in your VETenrol General Settings, in the File Type ID field.

> See also: VTDocs API Details on page 107 regarding adding the file type.

Appendix 13: FinPa Integration

VETenrol is compatible with FinPa LMS, providing an end-to-end solution where registrations are received, processed and passed to FinPa LMS, potentially allowing participants access within minutes.

The key steps are to be completed in VETtrak using the FinPa LMS Brands setting in the **Configuration Manager**:

- Add your brand, and complete the wizard using details as provided by FinPa.
- Once the brand is created, open FinPa/VETtrak course mappings:

- Retrieve the course list from FinPa, then map all courses to the appropriate Unit/Module or Qualification.

Then from the Programme Manager, for each occurrence:

- Complete the Setup Auto Web Enrolment Transfer to FinPa LMS Wizard, accessible by right-clicking 'Enrolments' for the occurrence.
    - The checkbox 'Automatically send new web enrolments in this occurrence to FinaPa LMS' must be enabled.
    - The appropriate transfer option must also be enabled.
- Complete the Quick Publish Wizette, accessible by right-clicking 'Details' for the occurrence. The following checkboxes must be enabled:

- Publish for LMS integration
- Publish for online enrolment
- Auto-process web reservations.

> **NOTE**:Occurrences must contain the Units/Module(s), or have the qualification selected, that were mapped in the configuration.

> **See also**: Help Centre documentation for detailed information regarding VETtrak's FinPa integration.

Appendix 14: Ezidebit Integration

VETenrol does not integrate with Ezidebit, rather there is an integration for VETtrak.

However, VETenrol does have an Ezidebit payment method that can be enabled, which will allow students to indicate their desire to pay by Ezidebit payment plan. Additionally, VETenrol will collect a student's preferences in regards to payment frequency.

When a client, who has chosen the EziDebit Payment Plan, is matched and successfully processed from VETtrak Web Enrolments, you will receive a message similar to the following:
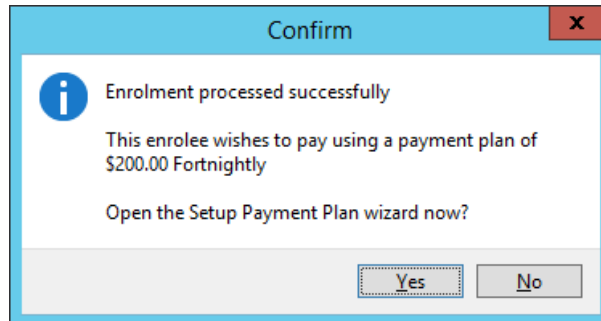
- Click '**Yes**'.

The *Setup Payment Plan wizard* will be opened.

- Complete the wizard to set up the payment plan. '**Payment per instalment**' and '**Instalment frequency**' should be pre-filled based upon the student's selections during registration.

> **See also**: Our [Help Centre](#) section on the Ezidebit integration for VETtrak.

Appendix 15: VETenrol Web Service

VETenrol data can be presented within your website in your preferred format using the Web Service.

The Web Service is designed for clients that require more complicated functionality for their website than the standard interfaces allow. The Web Service is intended for clients with an external web developer that will integrate the needed data and provided the desired styling.

Visit https://enrol.vetenrol.com.au/resources/VT-DEMO/webservice/index.html for details on the available functions.