



RELEASE 1107

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What's in it for me

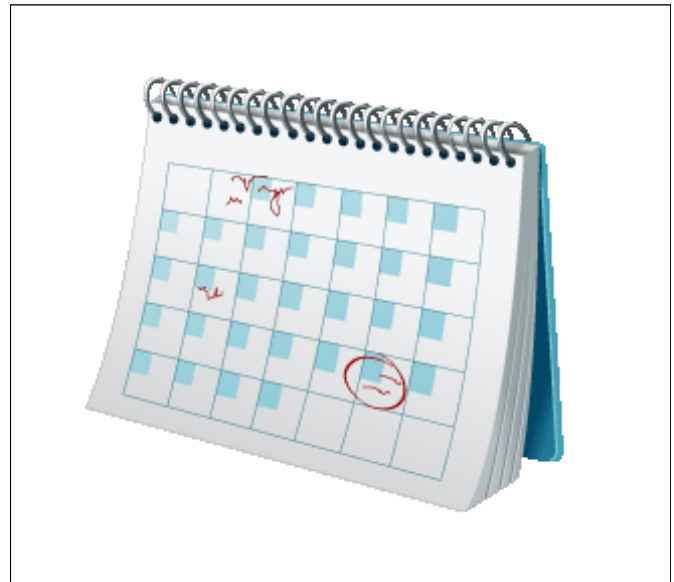
- Continuous Improvement Register
- Company Documents
- Company Contact Log
- Course Documents
- SMS Clients
- Web Enrolments
- Other Improvements

POWERPRO RTO 1107 RELEASED

It is with great enthusiasm that we announce the release of PowerPro RTO 1107. This release is packed with new features suggested by our clients. This Newsletter highlights the new features of 1107 and contains the instructions on how to install this update. At the end of the newsletter you will also find what is on our development roadmap.

We take this opportunity to thank you all for the great referral provided, this helps significantly consolidating our client base making PowerPro RTO a widely used Training Management System.

Now to the new features!

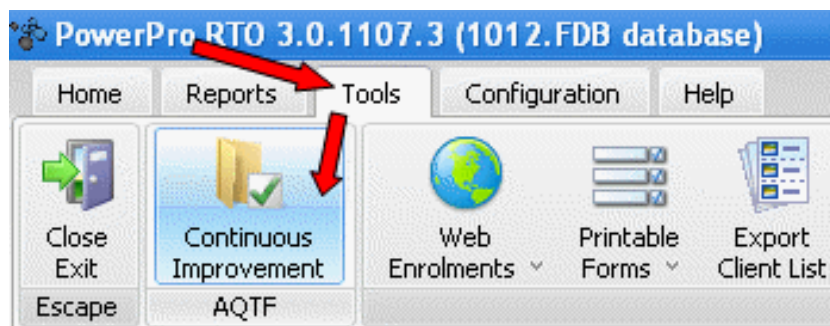


PowerPro RTO clients are entitled to all updates released

CONTINUOUS IMPROVEMENT REGISTER

The Continuous Improvement Register is a new top level function in the system, use this area to track Continuous Improvement. Each Issue/Concern recorded can have multiple results/outcomes and multiple documents attached to it. A new set of actions relating to the Continuous Improvement Register have been created, please make sure you review your Role's permissions to reflect who should have access to which actions on the Continuous Improvement register.

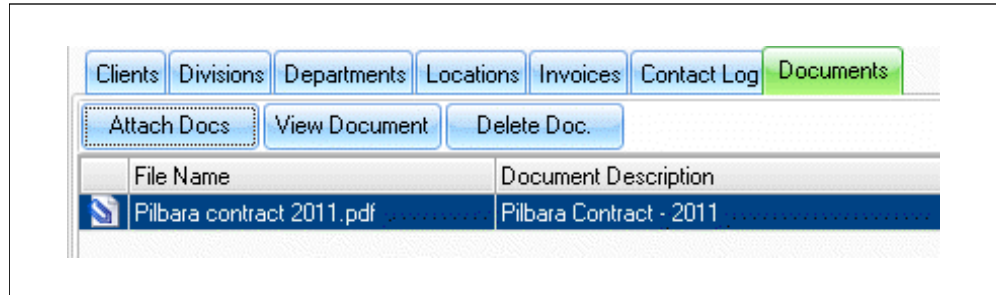
The Continuous Improvement Register is available from the AQTF section of the Tools menu:





COMPANY DOCUMENTS

Another popular feature that has been requested by several clients is the Company Documents. This function allows storing any documents such as Contracts, Purchase Orders, etc against Client Company records in PowerPro RTO. A very similar function to what is already available for Students and Trainers. Having these documents centralised against the Company means they are stored in a centralised location and therefore easier to access. Additionally, you can configure your Roles to determine which users can view and attach Company Documents.

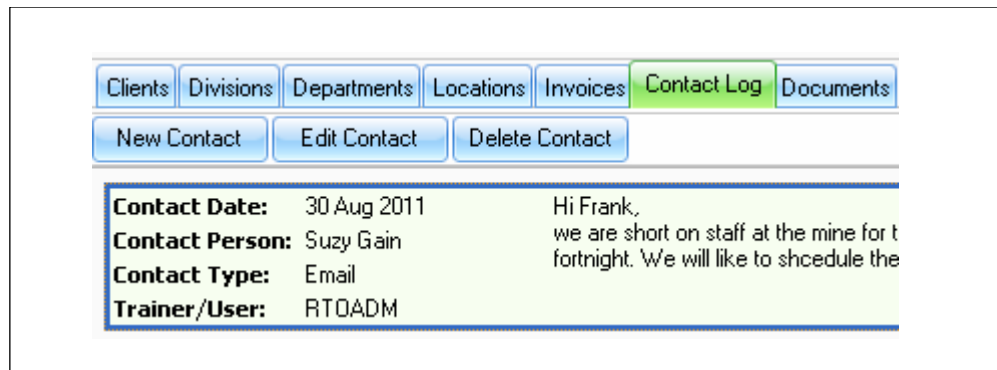


Attach multiple documents against your Client Companies

We appreciate your continuous feedback and input. It paves the way to upcoming updates.

COMPANY CONTACT LOG

Similar to the existing Contact Log for Clients we now introduce a Contact Log for Companies. Inline with the principle of Company Documents, this allows for a centralised log of all relevant communication between the RTO and it's Client Companies. Again, review your Roles to determine which users should access/modify Company Contact logs.



Record relevant communication using the new Company Contact Log

COURSE DOCUMENTS

Copies of signed attendance sheets can be attached to the Course as Course Documents. Any other documents related to a particular group of Students are great candidates to be stored here. These Documents are not copied when the Course is cloned as they are only relevant for each individual Course/group of Students. As you might be guessing by now there are specific actions for this function so reviewing your Roles is recommended again.

COURSE DOCUMENTS (CONT.)



Course details

Main Info | Scheduled Sessions | Attendance | Trainers/Resources | **Docs** | Invoicing

Course - A

Attach Docs | View Document | Delete Doc.

File Name	Document Description
Signed Roll.pdf	Final Roll signed by Students and Trainer

Attach relevant documents against your Courses

SMS CLIENTS

The convenience of notifying/reminding your participants via SMS is now available. This can be done individually or in bulk to multiple participants in a Course. Much like with email, when sending an SMS users can opt for logging which creates a Contact Log record for each SMS sent containing the message sent as well as the feedback from the SMS gateway. The SMS gateway used is Clickatel and the cost is approx \$0.06 per SMS sent.

SMS Course Participants

Course Name: C000001 - Nail Technology

Enrolled Clients

Status	Client Name	Mobile phone
✓	COSTA, MIGUEL	0412 555 666
✓	COSTEX, LIZ	0405 998 778
✓	CRAWLER, DIANA	0447 558 996
✓	DINO, SHARON	This Client has no Mobile phone
✓	DORES, MARIA	0421 558 977
✓	HILL, SARAH	This Client has no Mobile phone
✓	KALPINSKY, JANINE	This Client has no Mobile phone
✓	MARTINEZ, MONICA	This Client has no Mobile phone
✓	MARY, ROSE	This Client has no Mobile phone
✓	MONKEY, JANE	This Client has no Mobile phone

Message/Logging

Message: Just a reminder for your training Course tomorrow at 9:00. Location: 44 Narrow Neck Rd, webberton, 6532 WA. See you in the morning, Steve Rocket

Country Code: 61

14 characters left.

Create a Contact Log entry for each Client

Contact Type: SMS Sent

User/Trainer: Steve

Action log

SMS your participants in bulk. A Contact log tracks your messaging history

“We use bulk SMS from PowerPro to remind our Clients of their Courses next day”

Keith Lawrence - Pro Skills



To enable the SMS subsystem please follow the steps described in detail in [Configuration> Application Options> SMS](#).

“Web Enrolments increased our Client exposure, reduced data entry and improved the enrolment workflow”

*Karen Streeter -
Australian Aerospace*

WEB ENROLMENTS (OPTIONAL)

Web Enrolments is a small framework that enables publishing a selection of Courses on the RTO's web site and the ability to capture enrolments against these Courses online. Prospective Clients browse through the Courses offered and enrol online. The enrolment form captures the Client details including AVETMISS fields. Online enrolments are emailed to the Course administrator with a data file attached. When this data file is imported into PowerPro, the Client is created and enrolled in the Course. Some of our clients have implemented this successfully. Their feedback indicates more exposure (Courses listed online automatically) and less time spend on data entry.

ProSkills Training

Courses

Course Title	Start Date	End Date	Location	Price/Fees
1636 Certificate IV in Frontline Management	01 Jun 2011	30 Jun 2012	468 BRIDGE ROAD, MACKAY, QLD	\$1,950.00
1632 BSB50607 Diploma of Human Resources Management	01 Jun 2011	30 Jun 2012	468 BRIDGE ROAD, MACKAY, QLD	\$3,500.00
1631 BSB51107 Diploma of Management	01 Jun 2011	30 Jun 2012	468 BRIDGE ROAD, MACKAY, QLD	\$3,500.00
BSB40807 Certificate IV in Frontline Management - RPL - SSQ - 1629	01 Jul 2011	30 Sep 2012	468 BRIDGE ROAD, MACKAY, QLD	\$900.00
BSB40407 Certificate IV in Small Business Management - RPL - SSQ - 1627	01 Jul 2011	30 Sep 2012	468 BRIDGE ROAD, MACKAY, QLD	\$900.00
BSB50607 Diploma of Human Resources Management - RPL - SSQ - 1624	01 Jul 2011	30 Sep 2012	468 BRIDGE ROAD, MACKAY, QLD	\$1,500.00
BSB51107 Diploma of Management - RPL - SSQ - 1623	01 Jul 2011	30 Sep 2012	468 BRIDGE ROAD, MACKAY, QLD	\$1,500.00

Showing 1 to 7 of 7 entries (filtered from 48 total entries) First Previous 1 Next Last

Clients can enrol online using the Web Enrolments

The Web Enrolments module is an add-on to PowerPro. It costs \$300.00 +gst per year. For more information please contact us on (08) 9467 7695.

IMPROVED INVOICING



To complement the Invoicing subsystem we have added two new concepts: a Price list where the RTO can maintain all standard fees and a Course Fee Structure. The latest is similar to the Price list but is linked to a specific Course and is copied along with the Course details whenever a Course is cloned. The Price list is found under Configuration:

Pricelist

Description	Unit Value	GST
Late enrolment fee	\$25.00	\$0.00
Recognition of Prior Learning (per Unit)	\$60.00	\$0.00
Text Books - Cert IV in Nail Technology	\$70.00	\$7.00

Loading the Price list into the system saves you time when invoicing

There are two new invoice fields: "Account No" and "Tax Code". These are the target Account No and Tax Code in MyOB. You can leave this blank if you do not integrate the accounts with MyOb.

Please read through for instructions on installing this update.

OTHER IMPROVEMENTS

Email: We have added a new type of Email method: "Outlook". This allows PowerPro RTO to email directly via Outlook so that a copy of the email sent is left in your Sent items. When emailing from the "Enrolments and Results"> Email Clients, choose "Outlook" as the Email method. Outlook should be open when emailing from PowerPro. If Outlook brings up a message about security we suggest installing the free Mapilab Advanced Security add-in: <http://www.mapilab.com/outlook/security/>

My Fields: in the previous release (1012) we introduced the "My Fields" concept. This is a set three of fields that can define for you own use by changing their labels and therefore their meaning in the database. We have now increased these fields to six and have increased their field length from 30 to 40 characters long. MyFields are located in their own tab in the Enrolments window and be set individually or in bulk using the Bulk dropdown button. These fields are now available for Merge in Training Plans, Class Roll, Letters (Mail Merge) and Certificates. MyFields are configured in Configuration> Application Options> Enrolments

Unit Trainer field: It is now possible to associate a Trainer with a Client/Unit outcome. In Enrolments and Results, use "Edit Enrolment" and double-click on a Unit/Module (Outcomes & Dates). This window allows linking a Trainer to that Unit outcome.



OTHER IMPROVEMENTS (CONT.)

Certificate Copies: The system can attach a copy of each Certificate/Statement printed against the Client and the Enrolment. Should you need to re-print the document you can easily find it under Client> Documents, click "View Document" and print it. The document copy can be attached as a MS Word Document or as a PDF. Please set your preference under Configuration> Application Options> AQTF> Document Format.

Bulk add Unit: use Bulk Add Optional Units to add one or more optional Units to multiple Clients within a Course.

Calendar Enrolments: it is now possible to enrol Clients from the Trainer Scheduler. Just right-click on the session cell in the calendar and choose "New Enrolment".

CQR SA: Client Qualification Register for South Australia is now implemented.

AVETMISS: The Zip function has been fixed, you can now create a valid zip archive the NAT files from within PowerPro RTO no longer requiring to create the archive manually.

AVETMISS: Delivery Location code was changed to a mandatory field to minimize validation errors.

AVETMISS: Course Field of Education dropdown to ease looking up FOE codes.

AVETMISS: Dual AVETMISS format for NSW: Training Markets and Non APL.

Client Second ID: Allow setting Secondary ID as a Unique field (no repetition of the same Secondary ID). This can be set in Configuration> Application Options> Clients.

Client Balance: Show Client Balance in Client window - this is configurable, to show/hide it. Use Configuration> Application Options> Clients> Show Client Balance.

Class Roll: Student Address fields available on Roll. Field names are: address, town, postcode and state.

Custom reports: this tool is now part of PowerPro (accessible via Reports> Custom Reports).

Grades and Marks: these fields are now available as an optional form of resulting. Use Application Options> Enrolments to enable/disable Grades and Marks.

Default Session times: Use Configuration> Application Options> Scheduler to adjust the default Start/Finish times for your sessions.

Import/Export spreadsheet: The email field has been added as an option when Exporting/Importing from a spreadsheet.

Mail Merge: Expiry date of each unit in Letters/Mail Merge (DTEXP1...DTEXP30)

More: Other small improvements, you will find these as you use the system.

*AVETMISS 6.1
will be supported on
next release.*

HOW TO INSTALL THIS UPDATE

Installing this update:

- 1) Ask all users to logoff from PowerPro
- 2) Create a Backup of your Database (Tools >Backup Database)
- 3) **From a PowerPro workstation**, download and run the following (needs to be run only once from any workstation)

<http://www.powerprorto.com.au/tms/1107/1107.exe>

This might take a couple of minutes to run, depending on how much data you have in the database. Please do not try to stop/kill this process. It should finish with the message "Database updates succeeded". If this is not the case please contact us and we will assist.

- 4) **For each PowerPro workstation**, download and run the following:

<http://www.powerprorto.com.au/tms/1107/workstation.exe>

You can run this update (step 4 only) any time, in fact it is a good idea to run it periodically (say once a month) as we continuously release new builds (minor changes and small fixes) to PowerPro RTO . You will notice the build number increasing as you update.

While we have got your attention, please double check your backups are happening overnight. Since we are storing documents within the database, the database file growth is faster. Please ask your IT person to check this procedure. We also encourage having a policy in place to regularly take a copy of your latest database backup offsite. This ensures data recovery in case of a fire, natural disaster or burglary.

OUR ROADMAP TO 2012

Planning is a key element for success. The following is a list of features to be released in early 2012:

- Compliance with changes introduced in AVETMISS 6.1
- Document Group: Ability to group training/Assessment materials into Document Groups. Each Course can link to one or more Document Groups making it easy to access Course Contents from PowerPro RTO .
- Trainers Industry Experience tab to complement current "Academic Info". Useful to track Meetings/Seminars/Job Functions for each Trainer.
- Export function for QuickBooks.
- Dashboard: a graphical view (charts) of your Key Performance Indicators: Enrolments per Month, Invoicing per Month, etc - we welcome your ideas on KPIs, please let us know what you would like to measure/view on the dashboard.
- Other small improvements

OFFICE HOURS

Kindly reminder to our clients that our office hours are from 7am to 4pm AWST Monday to Friday Western Australia working days.



PowerPro RTO Newsletter

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