

VIDATEK

PowerPro RTO User Manual

VERSION 3.0.1301 (C)

User Manual can be found online using the link below

<http://powerprorto.com.au//tms/powerpromanual.pdf>

About this Manual

About the software

PowerPro RTO is a total training management solution designed to help registered training organisations manage their records in an easy and effective manner.

Using the Australian standard training terminology and fully AVETMISS 6.1 compliant, PowerPro is the essential training management database tool for any training organisation or business involved in the delivery of training.

In use by RTO's since mid 2004 in industries that range from transport to communication, PowerPro is a mature and stable product with an ever increasing number of features and capabilities.

Assuming no one knows the needs of a product better than those who use it, we utilise input from our clients to choose the features to implement in upcoming versions of the product.

This makes Power Pro a software application that is guided by those involved in the training industry and therefore tailored for the training industry.

About this manual

This manual is designed to provide a basic introduction to the features and capabilities of the PowerPro application. It provides an overview of each component and takes you through the basic steps of adding and managing data for clients, courses, enrolments and results, trainers and assessors through to client invoicing and payment management.

PowerPro is a highly configurable application and allows organisations to establish

Important information about the system is highlighted using the 'notes' field:

NOTE: This is an example of a note highlighting important information regarding PowerPro.

Further help information is available from the frequently asked questions page on the PowerPro website: www.powerprorto.com.au/faq.

Table of Contents

1. SOME FUNDAMENTAL CONCEPTS	5
2. FINDING YOUR WAY AROUND	6
2.1. Logging on	6
2.2. Using shortcut keys	7
2.3. Using the filter	8
2.4. Using the calendar	8
2.5. Mandatory fields	9
2.6. Entering data	9
3. CLIENTS	10
4. ENROLMENTS AND RESULTS	16
5. QUALIFICATION RULES	34
6. ACCREDITED COURSES	37
7. NON-ACCREDITED COURSES	45
8. CLIENT COMPANIES	46
8.1. Company Divisions, Departments and Locations	47
8.2. Company Invoices	48
8.3. Company Contact Log	48
8.4. Company Documents	49
9. TRAINERS AND ASSESSORS	51
10. TRAINER SCHEDULER	53
11. INVOICES AND PAYMENTS	60

11.1. Qualification Check	Error! Bookmark not defined.
12. AVETMISS/RAPT	70
13. REPORTS	80
14. TOOLS AND SYSTEM CONFIGURATION	92
14.1. Application Options	92
14.2. User management and roles	93
14.3. Victorian Student Number	80
APPENDIX A GLOSSARY	105

1. Some fundamental concepts

PowerPro RTO allows you to track accredited and non-accredited training records. The main difference between these is highlighted in the following table:

	Accredited Courses	Non-Accredited Courses
Subjects/Outcomes	Units of Competence	In-house Modules
Recognition	National	None
Document issued	Qualification or Statement of Attainment	Certificate of Attendance
Example of Course Name	Certificate II in Music	Course in Employee Induction
Example of National Code	CUS20105	INDUC
Part of AVETMISS Collection	Yes	No
Other differences	Units can be imported into the system	Modules must be entered into the system by the user

Accredited Courses can be made of a couple of Units (for licensing purposes for example, e.g. Responsible Service of Alcohol, white card, operate a forklift, etc) or they can form a full Qualification. In the first case (usually referred to as “Short Courses”) Clients are issued with a Statement of Attainment upon completion of the Course. On the other hand when completing a full Qualification Course Clients are issued a Qualification (Certificate II, Diploma, etc) as well as a Transcript of Results.

The following table summarizes which document(s) are to be issued depending on the Course type as well as the Client outcomes:

Course Type	Documents Issued upon Completion	Example
Full Qualification	Qualification and Transcript of Results	Certificate IV in Music
Short Course	Statement of Attainment	Course in First Aid
Non-Accredited Course	Certificate of Attendance	Course in Employee induction

2. Finding your way around

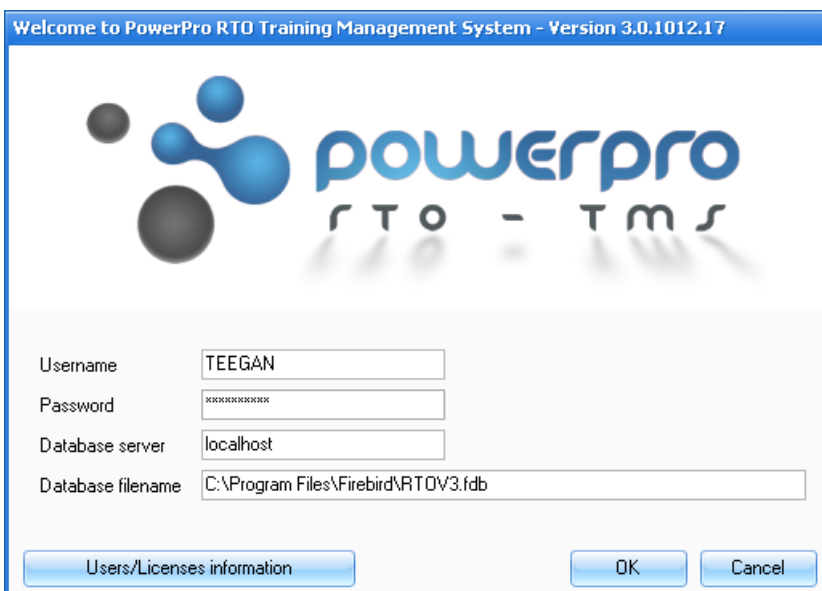
2.1. Logging on

PowerPro is a multi-user application with integrated authentication. This means that you require an account with a username and password to log in to the application.

The username and password for each account are controlled by the system administrator. By default, the system administrator account has the username 'RTOADM' and password 'MANAGER'. It is recommended that the password for the administrator account is changed after the first login.

The administrator is able to access specific functions not available to other users such as user management, report settings and client deletion.

To log in to your account, select the PowerPro application from the Programs list on your computer. The **Login** screen will appear.



■ Figure above – PowerPro RTO login screen

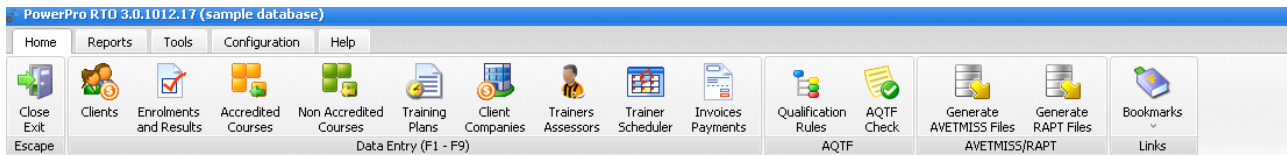
Enter your username and password and select the OK button. The Database server is the name of the system/computer that holds the database (typically your server) and Database filename is the absolute path to the database within the server.

NOTE: None of these fields is case sensitive.

If your login details have been entered correctly, the main PowerPro application screen will appear.

2.2. Using shortcut keys

The PowerPro toolbar has a number of shortcut keys set up by default to enable you to complete common tasks:



The shortcut keys as shown in the following table.

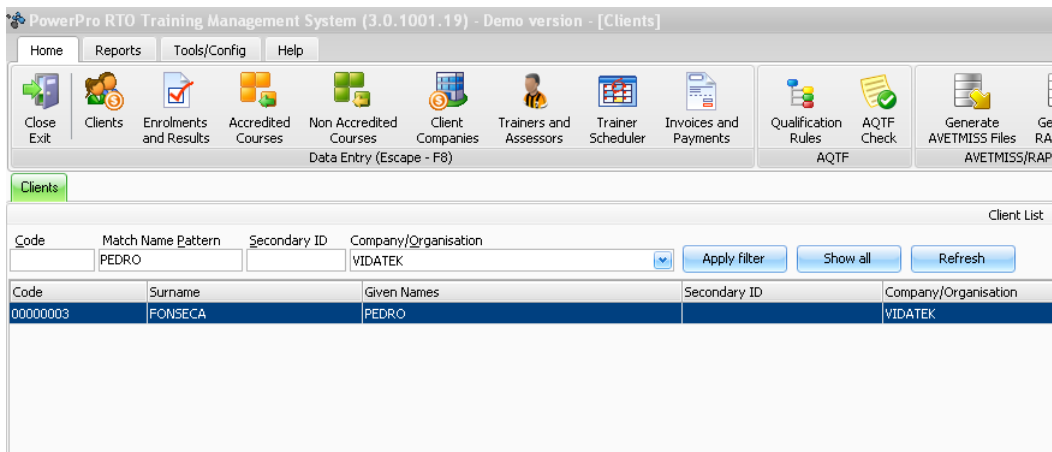
Shortcut Key	Outcome
Esc	Close: close the current window
F1	Clients: maintain or search client details.
F2	Enrolments: maintain course enrolments and results.
F3	Accredited courses: maintain accredited course structures and units of competency.
F4	Non-Accredited courses: maintain non- accredited course structures and in-house modules
F5	Training Plans: maintain individual client/enrolment training plans
F6	Client companies: setup and maintain client company information.
F7	Trainers: setup and maintain trainer and assessor information.
F8	Scheduler: calendar based trainer-scheduling tool.
F9	Invoices & Payments: maintain invoices and payments

■ Table above - PowerPro shortcut keys

2.3. Using the filter

You can refine the client list using the filter function. Enter the filter requirement(s) in the corresponding field(s) and click the **Apply Filter** button.

For example, refine the client list to only show clients from ABC Pty Ltd, select 'ABC Pty Ltd' from the Company/Organisation filter dropdown list and click the **Apply Filter** button. The client list will refresh to only show those clients who are listed as working for ABC Pty Ltd in their client record. Remember to delete filters to show all clients or courses.

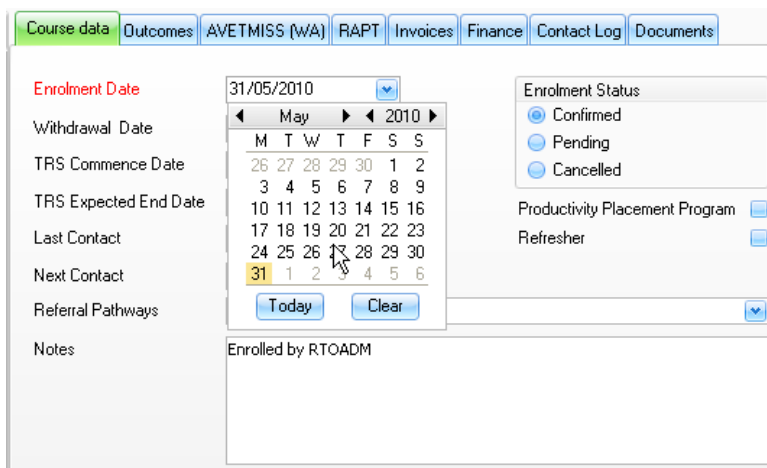


■ Figure above - Using the filter to list clients

2.4. Using the calendar

Certain screens in PowerPro require you to enter a date. Dates are entered using the calendar menu to select the day, month and year.

To access the calendar menu, select the 'down' arrow at the end of the date field. The calendar menu will appear automatically. Make your selection by clicking on the corresponding date in the calendar. Use the 'left' and 'right' arrows to change month or year. Alternatively, you can use the keyboard and type the date into the field.



■ Figure above -PowerPro screen showing calendar

2.5. Mandatory fields

Mandatory fields are shown in **red**. When you are providing input to a screen with mandatory fields, you must complete these fields before you can save this information or move to the next screen.

Administrators of the system can configure which fields are mandatory for each screen. This means that the screenshots in this manual may appear differently to the version you are using of PowerPro.

2.6. Entering data

When entering data into PowerPro it is important to be as accurate as possible, to avoid having to edit at a later date.

Try to input as much information as possible to ensure a wider search result and to include in reporting.

When required to edit or amend either clients or course details, note that you need to select the client/course and then edit to make any changes and remember to save. If you navigate to another window and you haven't finished saving that record you will more than likely experience an error msg that will not allow you to continue on the current screen. You will need to check back on other opened screens to make sure that you haven't left any actions not completed.

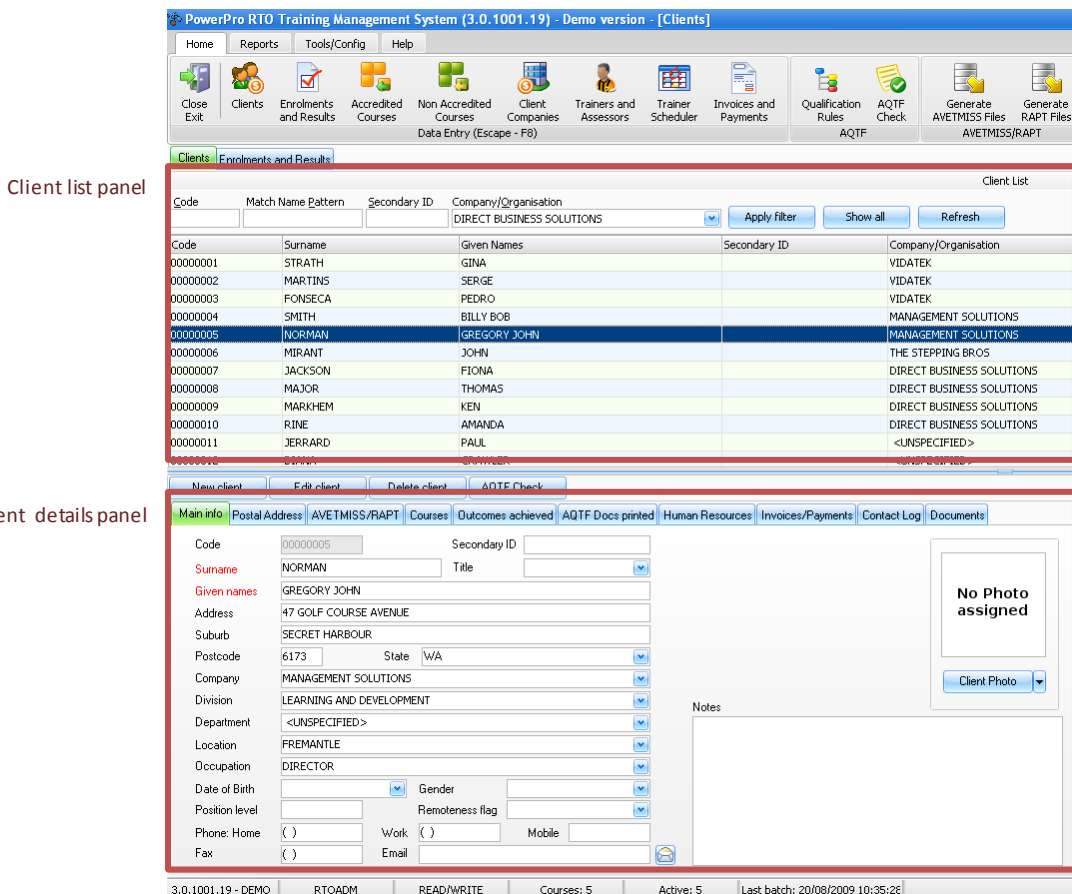
3. Clients

From the **Clients** screen of PowerPro you can manage all the clients within your database. In PowerPro, a 'client' is a person entered in the system for the purpose of undertaking training – this is the nomenclature specified by AVETMISS.

The **Clients** screen has two panels:

- Client list
- Client details.

The client list panel appears at the top of the screen, just below the main menu. The client details panel appears directly below the client list.



■ Figure above - Clients screen

The client details panel contains a number of tabs which you can use to access information regarding the selected client.

Tab	Purpose
Main info	Displays general client information, including names, contact details, company information and client photo.
Postal address	Displays the postal address for the client (can be different from main address shown on Main info tab).
AVETMISS/RAPT	Displays Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS) or Resource Allocation Program for Training (RAPT) data for this client.
Courses	Displays a listing of any courses this client has ever been enrolled in, including current courses, completed courses and any courses where the client has withdrawn their enrolment.
Outcomes achieved	Provides a list of outcomes this client has achieved for any of the courses they have been enrolled in.
AFTF docs printed	Provides a list of any Australian Qualification Training Framework (AFTF) documents that have been printed for this client: Certificates, SOAs and Transcripts of Results
Invoices/Payments	Provides details of any invoices that have been generated for courses provided to this client, and a record of payments made for each of these invoices.
Contact log	Used to create and maintain records of any contact with this client.
Documents	Displays any documents specific to this client that have been attached to the Client (e.g. SOAs from other Providers, Student work, certified copies of identification documents, etc).

■ Table above - Client details panel tabs

3.1.1. Reviewing an existing client record

To review an existing client record, click the name of the client in the client list panel of the screen. The information for the selected client will appear in the client details panel of the screen.

You can refine the client list using the filter function. Enter the filter requirement(s) in the corresponding field(s) and click the **Apply Filter** button. For further information, see [Using the filter](#).

You can navigate to the different sections of the client details panel by selecting the various tabs across the top of the panel. By default, client details panel shows the **Main Info** tab.

3.1.2. Adding a new client

To add a new client to the database, click the **New Client** button (or the **F1** key). The client details panel will appear with no data in any of the fields, with the exception of the **Code** field, which is an automatically generated unique number and cannot be edited.

■ Figure above - Client details panel

Enter data for all mandatory fields (labelled in red) and any other fields as relevant.

If a particular field is not relevant, you can leave it blank or, in the case of dropdown lists, you can select **<UNSPECIFIED>**.

To move between fields, click your mouse cursor in each field, or use the **Tab** key or the **enter** key. To enter additional data (e.g. postal address, AVETMISS/RAPT data) select the corresponding tab in the client details panel.

NOTE: The majority of client data fields are set to UPPERCASE by default, with the exception of the email and postal address fields.

Some fields will be dropdown lists of existing values from the database. For example, the **Companies** field enables you to select one of the client companies that have already been added to the database. Alternatively, you can add a new client company by clicking the **+** button to the right of this field to bring up the **Client companies** screen. For further details, see **Error! Reference source not found..**

■ Figure above - Options for assigning a client company to a client

Select the **Postal Address** tab to set the postal address details for the client. You can enter a specific postal address, or click the **Same as Main** button if this address is the same as entered under the **Main Info** tab.

The screenshot shows a web-based form for entering postal address details. At the top, there are navigation buttons: 'New client', 'Edit client', 'Delete client', and 'AQTF Check...'. Below these are tabs for 'Main info', 'Postal Address', 'AVETMISS/RAPT', 'Courses', 'Outcomes achieved', 'AQTF Docs printed', 'Invoices/Payments', 'Contact Log', and 'Documents'. The 'Postal Address' tab is active. The form contains the following fields: 'Address' with the value 'GPO Box 2299', 'Suburb' with 'MELBOURNE', 'Postcode' with '3001', and 'State' with a dropdown menu showing 'VIC'. A 'Same as main' button is located to the right of the address fields and is highlighted with a red rectangular box.

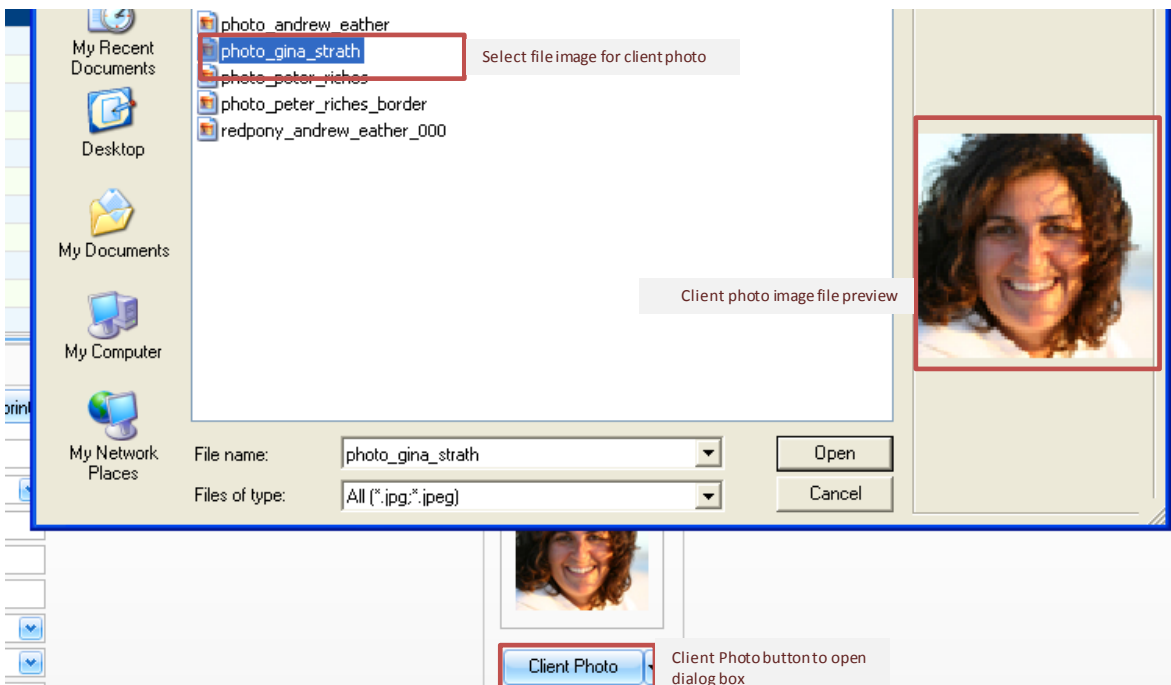
■ Figure above - Postal address options

Select the **AVETMISS/RAPT** tab to enter relevant AVETMISS and/or RAPT data for this client.

Select the **Documents** tab to view, upload or modify any documents specific to this client (e.g. certified copies of identification documents).

To upload a photo of the client, you must first save the details for a new client (you can check that the client data for a new client has been saved as the Code field will have been populated automatically). Select the **Set** option from the **Client Photo** dropdown list (or double-click in the photo area). The **Upload photo** dialog box will appear. Navigate to the image file and click the **Open** button. The image file will appear in the client photo area.

NOTE: Client photos are automatically resized in case they are larger than 450px of width or height.

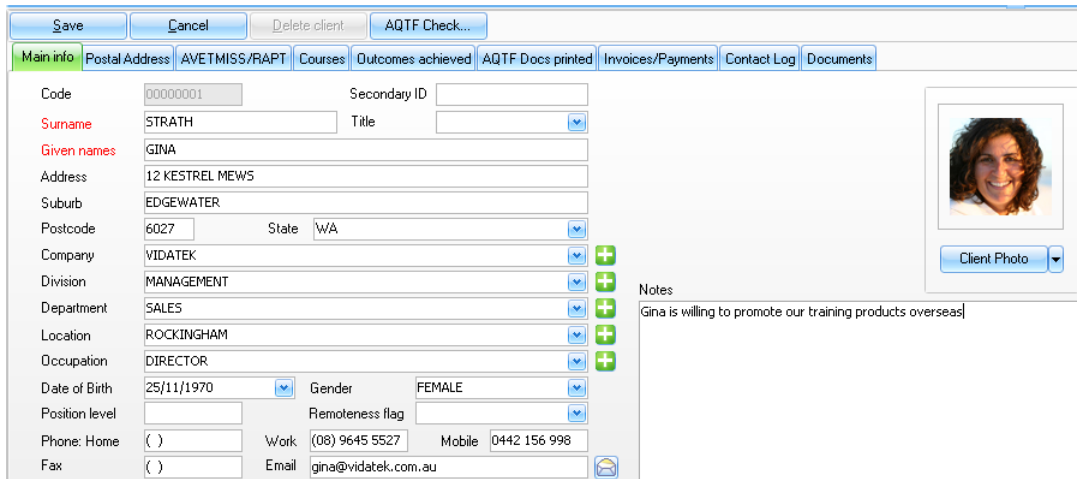


■ Figure above - Adding a client photo

Once you have finished entering data for the new client, click the **Save** button. A new client record will be created in the database.

3.1.3. Editing an existing client record

To edit the details of an existing client record, select/highlight the client in the client list panel (top part of the screen), then click the **Edit Client** button. The fields in the client details panel will now be editable and you will be able to modify each field, with the exception of the Code field, which is an automatically generated unique number and cannot be edited (unless it is configured to be entered manually under Configuration>Application Options>Clients).



■ **Figure 1. Editing details for an existing client record**

To move between fields, click your mouse cursor in each field, or use the **Tab** or the **Enter** key. To enter additional data (e.g. postal address, AVETMISS/RAPT data) select the corresponding tab in the client details panel.

NOTE: The majority of client data fields are set to UPPERCASE by default, with the exception of the email and postal address fields.

Select the **Postal Address** tab to edit the postal address details for the client. You can enter a specific postal address, or click the **Same as Main** button if this address is the same as entered under the **Main Info** tab.

Select the **AVETMISS/RAPT** tab to enter relevant Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS) or Resource Allocation Program for Training (RAPT) data for this client.

Select the **Courses** tab to review a listing of any courses this client has ever been enrolled in, including current courses, completed courses and any courses where the client has withdrawn their enrolment.

Select the **Outcomes Achieved** tab to review a list of outcomes this client has achieved for any of the courses they have been enrolled in.

Select the **AQTF Docs Printed** tab to review a list of any Australian Qualification Training Framework (AQTF) documents that have been printed for this client.

Select the **Invoices/Payments** tab to review details of any invoices that have been generated for courses provided to this client, and a record of payments made for each of these invoices.

Select the **Contact Log** tab to create and maintain records of any contact with this client.

Select the **Documents** tab to view, upload or modify any documents specific to this client (e.g. certified copies of identification documents).

To upload a photo of the client, select the Set option from the **Client Photo** dropdown list (or double-click in the photo area). The **Upload photo** dialog box will appear. Navigate to the image file and click the **Open** button. The image file will appear in the client photo area.

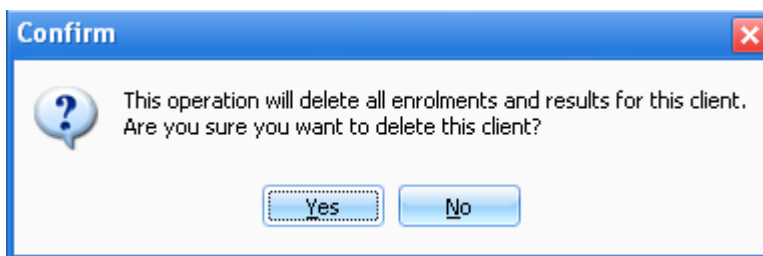
NOTE: Client photos image files must be smaller than or equal to 64Kb. The ideal dimensions for image files are 85 x 85 pixels.

Once you have finished modifying the details of this client, click the **Save** button. The changes to the client record will be saved in the database.

3.1.4. Deleting a client

To delete a client from the database, select the name of the client in the client list panel of the screen, then click the **Delete Client** button. A **Confirm action** dialog box will appear.

Click the **Yes** button in the **Confirm action** dialog box to delete the client record from the database.



■ Figure above - Confirm action dialog box

NOTE: Deleting a client will also delete all enrolments, results, documents, contact logs, invoices for this client from the database. Once this information has been deleted, it cannot be retrieved.

NOTE: You do not need to create the Clients in the Clients window. You can actually create them as you enter your enrolments for the Course under Enrolments and Results which is discussed in detail on its own chapter in this manual.

Enrolments and Results

This is the screen where most day-to-day tasks are performed. Examples of these tasks are: enrolling clients in a course, modifying their Unit selection, checking/changing their results/outcomes and dates, attaching relevant documents to the enrolment record, registering contact logs and creating invoices.

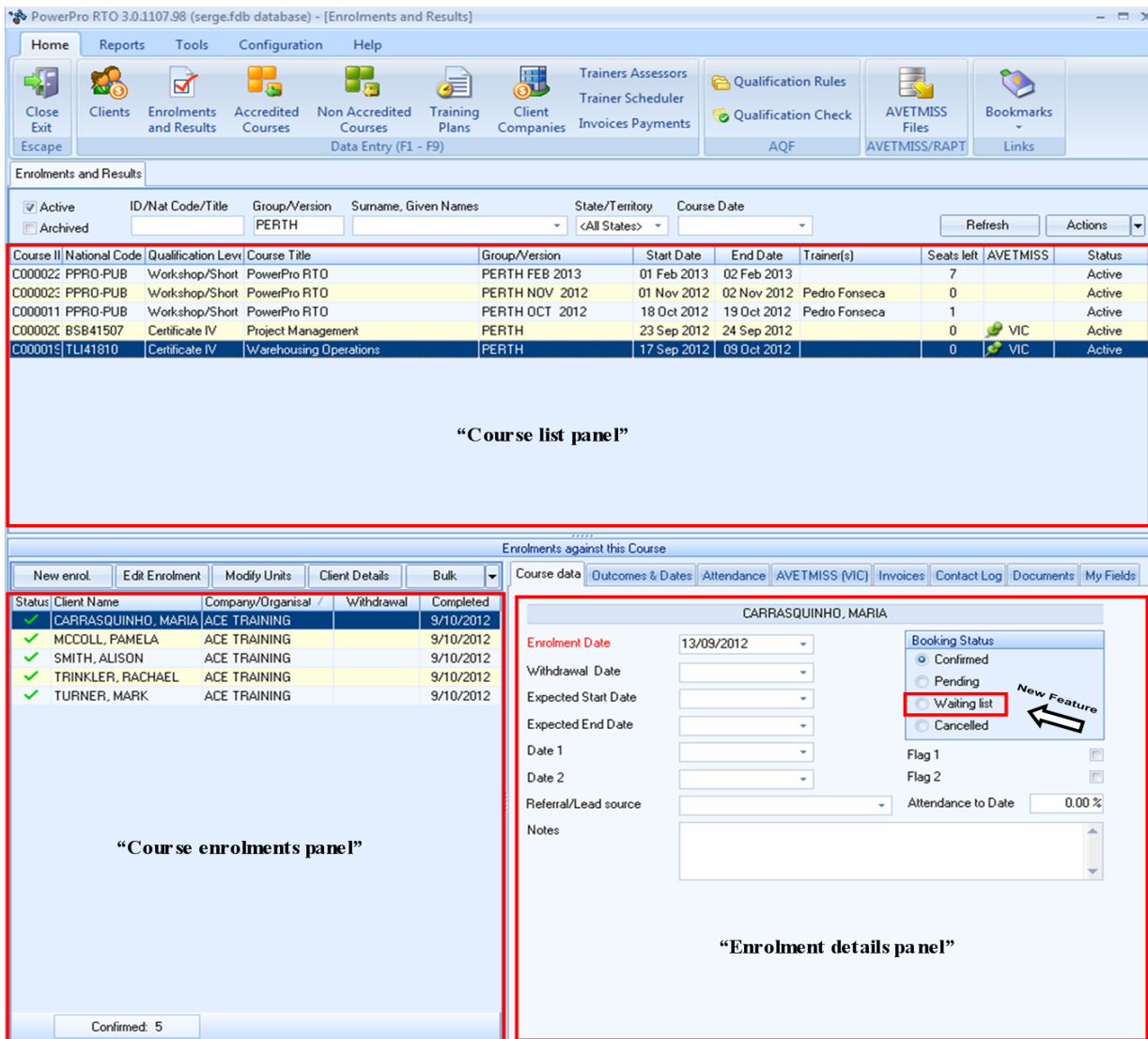
NOTE: From the **Enrolments and results** screen of PowerPro you can manage the enrolments for both accredited and non-accredited courses.

NOTE: Before a client can be enrolled in a course, that course must first be created – please see the relevant chapters in this manual for further information about creating courses.

The **Enrolments and results** screen has three panels:

- course list
- course enrolments
- enrolment details.

The course list panel appears at the top of the screen, just below the main menu. The course enrolments panel appears directly below the course list on the left, and the enrolments details panel appears on the right.



■ Figure above - Enrolments and results screen

When a course is selected in the course list panel, it is possible to add a new enrolment; or edit, delete or change the enrolment details for selected client in the course enrolments panel by selecting the corresponding tab.

You can also select the **Bulk** tab to makes changes to the course enrolment details for multiple clients (see Bulk functions).

The enrolment details panel contains a number of tabs which you can use to manage the enrolment information for the selected client for a specific course.

Tab	Purpose
Course data	Displays the basic information relating to this client’s enrolment in the selected course, including enrolment and withdrawal dates, dates for any contact with the client, as well as a general notes field and booking status that has the new feature of “waiting list”.
Outcomes	Provides a list of results achieved by the client for the selected course.
AVETMISS	Provides Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS) data for this client as it relates to the selected course.

RAPT	Provides Resource Allocation Program for Training (RAPT) data for this client as it relates to the selected course.
Invoices	Provides details of any invoices that have been generated for this client and the selected course, and a record of payments made for each of these invoices.
Contact log	Used to create and maintain records of any contact with this client as it relates to their enrolment in the selected course.
Documents	Displays any documents specific to this client as they relate to their enrolment in the selected course (e.g. transcripts of course results for credit transfers).

■ Table above - Enrolment details panel tabs

3.1.5. Reviewing existing enrolments

To review the list of clients enrolled in course, click the name of the course in the course list panel of the screen. All clients who have been enrolled in this course at some point (including those who subsequently withdrew their enrolment) will be listed in the course enrolments panel of the screen.

You can refine the course list using the filter function. Enter the filter requirement(s) in the corresponding field(s) and click the **Refresh** button. For further information, see [Using the filter](#).

You can review details of the enrolment for a specific client by selecting the client in the course enrolments panel, then navigating to the different sections of the enrolment details panel by selecting the various tabs across the top of the panel. By default, client details panel shows the **Course Data** tab.

3.1.6. Adding new enrolments to a course

To add one or more enrolments to a course, first select the course in the course enrolments panel, then click the **New Enrol** button in the course enrolments panel. The **Enrol clients in a course** screen will open in a new window.

The screenshot displays the 'Enrol Clients in a Course' window. At the top, there's a 'Client List' table with columns: Code, Surname, Given Names, Date of Birth, Company/Organisation, Division, Department, and Location. Below this is a 'Clients to be enrolled' table with the same columns. A 'New enrol.' button is located at the bottom left of the window. Annotations include: 'New enrol. button to open Enrol clients in a course screen' pointing to the button, and 'Clients to be enrolled in the selected course' pointing to the bottom table.

■ Figure 12. Enrol clients in a course screen

Select the clients to enrol from the client list in the top section of the screen, and click the **Enrol Selected Clients** button to add them to the clients to be enrolled list in the bottom section of the screen. To select multiple clients, hold down the **Control** key.

You can refine the client list using the filter function. Enter the filter requirement(s) in the corresponding field(s) and click the **Find** button. For further information, see [Using the filter](#).

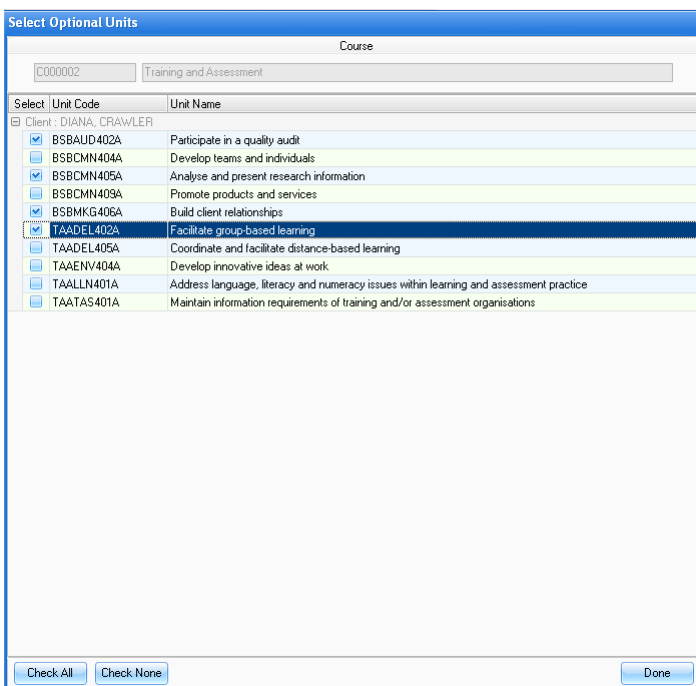
You can add new clients to the database by clicking the Create New Client button. The New client screen will open in a new window. See the section [Adding a new client](#) for further information.

Use the **Enrolment Date** field to set the date of enrolment for all clients in the clients to be enrolled list.

Select the **Refresher** checkbox if this course is a refresher course (as opposed to a course the client is undertaking for the first time). This is required so that the system can determine what type of certificate to issue for the client on completion of the course.

Once you have finished adding clients to the clients to be enrolled list, click the **OK** button.

If there are optional units for the course that was selected, the **Select optional units** screen will appear after you have clicked the **OK** button. Select the optional units that apply to the client(s) you are enrolling by selecting the corresponding checkboxes.



■ **Figure 13. Select optional units screen**

All the clients you selected will now appear in the course enrolments panel for the selected course.

3.1.7. Editing an existing course enrolment

To edit the details of an existing enrolment in a course, select the name of the client in the course enrolments panel of the screen, then click the **Edit Enrolment** button. The fields in the enrolment details panel will now be editable and you will be able to modify each field.

The screenshot displays the 'Enrolments against this Course' interface for client MARTINS, SERGE. At the top, there are tabs for 'Course data', 'Outcomes & Dates', 'Attendance', 'AVETMISS (VIC)', 'RAPT', 'Invoices', 'Contact Log', 'Documents', and 'My Fields'. The main area contains several input fields and a dropdown menu. The 'Enrolment Date' is set to 10/12/2012. Other fields include 'Withdrawal Date', 'Expected Start Date', 'Expected End Date', 'Assignment Due', 'Referral/Lead source', and 'Notes'. The 'Booking Status' dropdown is open, showing options: Confirmed, Pending, Waiting list (selected), and Cancelled. There are also checkboxes for 'Own Laptop' and 'A/H Access', and an 'Attendance to Date' field showing 0.00%.

■ Figure above - Enrolment details panel

Enter data for all mandatory fields (labelled in red) and any other fields as relevant.

To move between fields, click your mouse cursor in each field, or use the **Tab** key. To enter additional data (e.g. outcomes, AVETMISS, RAPT data) select the corresponding tab in the enrolment details panel.

Select the **Outcomes** tab to view/modify unit results and dates for the client in this course.

Select the **AVETMISS** tab to enter or edit Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS) data for this client as it relates to the selected course.

Select the **RAPT** tab to enter or edit Resource Allocation Program for Training (RAPT) data for this client as it relates to the selected course.

Select the **Invoices** tab to manage the creation or payment of any invoices for this client as they relate to the selected course.

Select the **Contact Log** tab to add or modify notes made of any contact with this client as they relate to their enrolment in the selected course.

Select the **Documents** tab to view, upload or modify any documents specific to this client as they relate to their enrolment in the selected course (e.g. transcripts of course results for credit transfers).

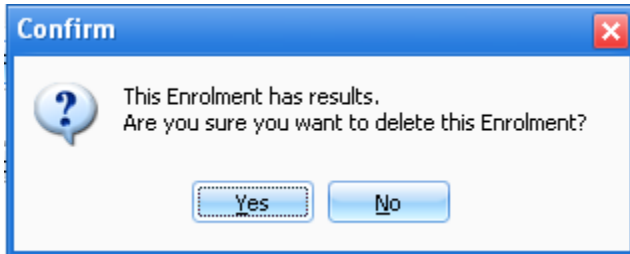
The Booking Status area now has another option field of "Waiting List" add enrolments to course with status of waiting list, if class already fully booked. If a cancellation happens, then edit client from waiting list to confirmed status.

Once you have finished modifying the course enrolment details for the client, click the **Save** button. The changes to the client's enrolment for the selected course will be saved in the database.

3.1.8. Deleting and existing enrolment

To delete a client's enrolment in a course, select the name of the client in the course enrolments panel of the screen, then click the **Delete Enrol.** button. A **Confirm action** dialog box will appear.

Click the **Yes** button in the **Confirm action** dialog box to delete the client record from the database.



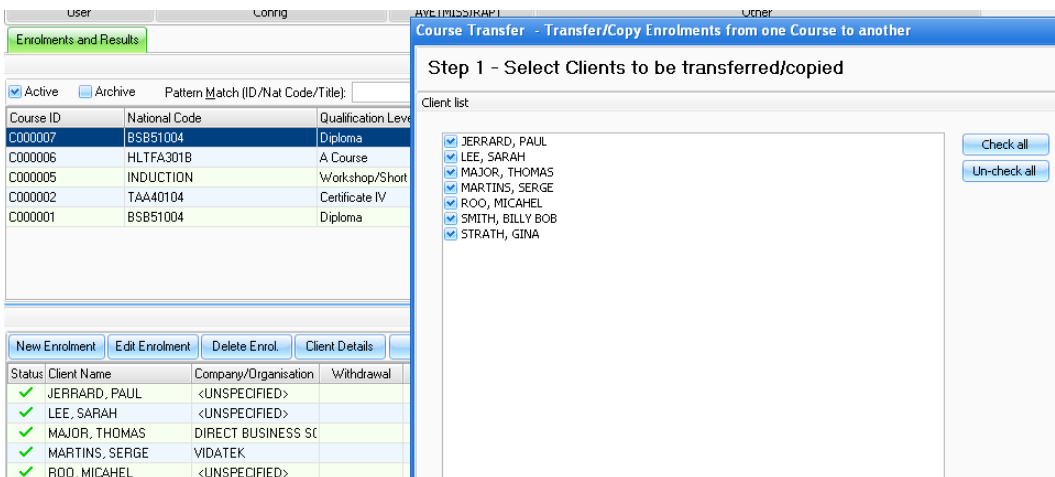
■ Figure above - Confirm action dialog box

NOTE: Deleting an enrolment will also delete all results for this client in this course from the database. Once this information has been deleted, it cannot be retrieved.

Once an enrolment has an invoice payment against it, the enrolment cannot be deleted.

3.1.9. Transferring enrolments to another course

Select the course with the existing enrolments (the 'origin' course) to be transferred in the course list panel. Right click on the name of the origin course and select the **Transfer enrolments** option. The **Course transfer** screen will appear in a new window, showing Step 1 (select clients to be transferred/copies).



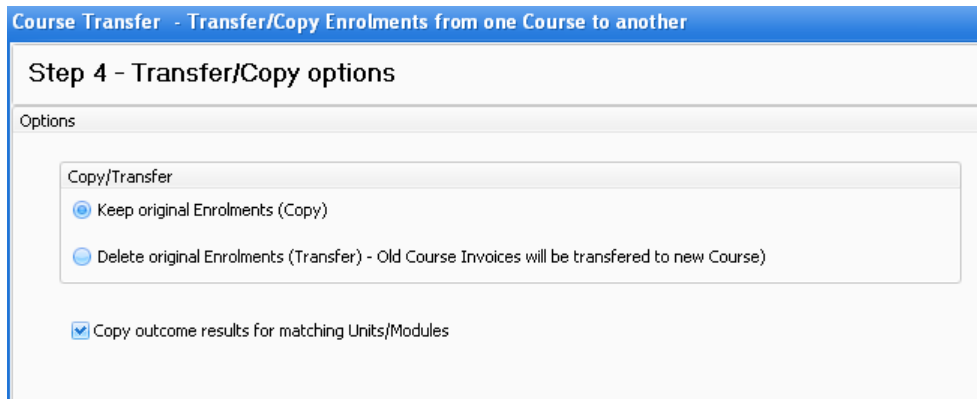
■ Figure above - Course transfer screen (step 1)

Select the checkboxes for the clients who are to be transferred into the destination course, then click the **Next** button.

Select the destination course to transfer the client enrolments, and then click the **Next** button. If the destination course has optional units, you will need to select the corresponding units by selecting or unselecting the checkboxes. Click the **Next** button.

Choose whether you will keep the clients enrolled in the origin course, and just copy the clients into the destination course or, alternatively, you can delete the original enrolments and transfer them to the

destination course. You can also choose whether or not to copy the outcome results for any matching units in the destination course from the original course. Once you have made your selections, click the **Finish** button. The selected enrolments will be transferred into the destination course.

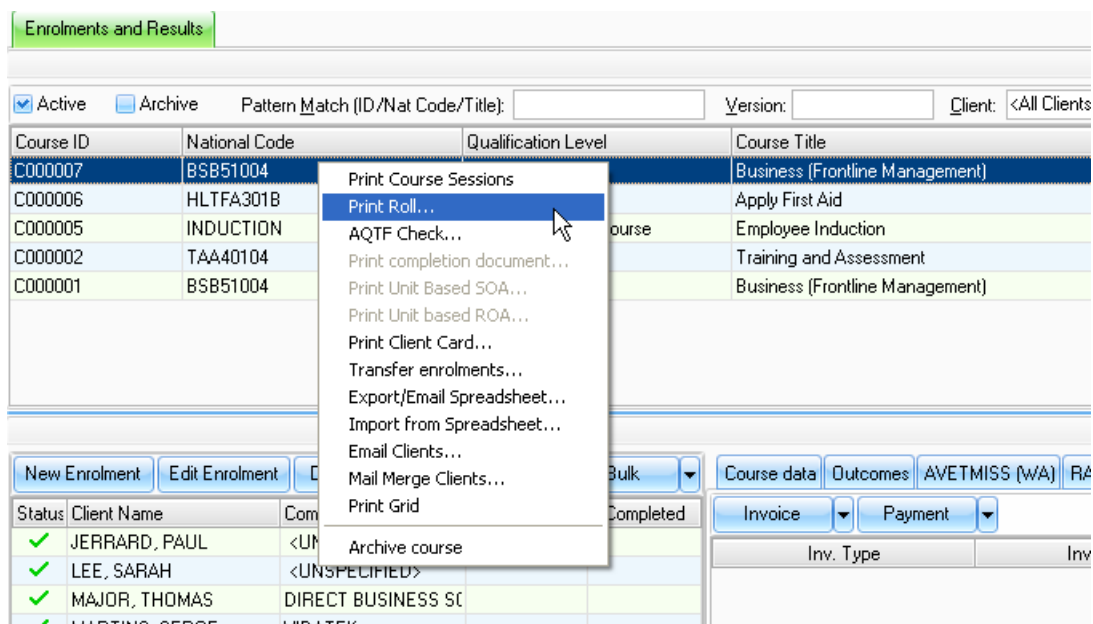


■ Figure above - Course transfer screen (step 4)

NOTE: You can transfer the enrolment of a client into a new course by right clicking the client's name in the course enrolments panel of the **Enrolments and Results** screen and following the same steps.

3.1.10. Printing a course roll

To print a roll of clients enrolled in a specific course, select the course in the course list panel. Right click on the course name and select the **Print roll** option. The **Select document template** screen will appear in a new window.



■ Figure above - Selecting 'print roll' option to print all course enrolments

Select the required template, and choose whether or not to include impending enrolments in the roll. Click the **OK** button.

The printed roll will open in the application of the selected template (e.g. Microsoft Word).

CLASS ROLL FOR: **Diploma - Business (Frontline Management)** FLM 2010 NIGHT COURSE
 Course No: C000007 Start date: 03/05/2010 End date: 29/05/2010
 Room no: ROOM 2 - HEAD OFFICE Enrolments: 7
 Trainer(s):



ID	Status	Name	Organisation																	Comments
00000004	Confirmed	Billy Bob Smith	Management Solutions																	
00000001	Confirmed	Gina Strath	Vidatek																	
00000013	Confirmed	Michele Rog	<Unspecified>																	
00000011	Confirmed	Paul Jerrard	<Unspecified>																	
00000014	Confirmed	Sarah Lee	<Unspecified>																	
00000002	Confirmed	Serge Martins	Vidatek																	
00000008	Confirmed	Thomas Major	Direct Business Solutions																	

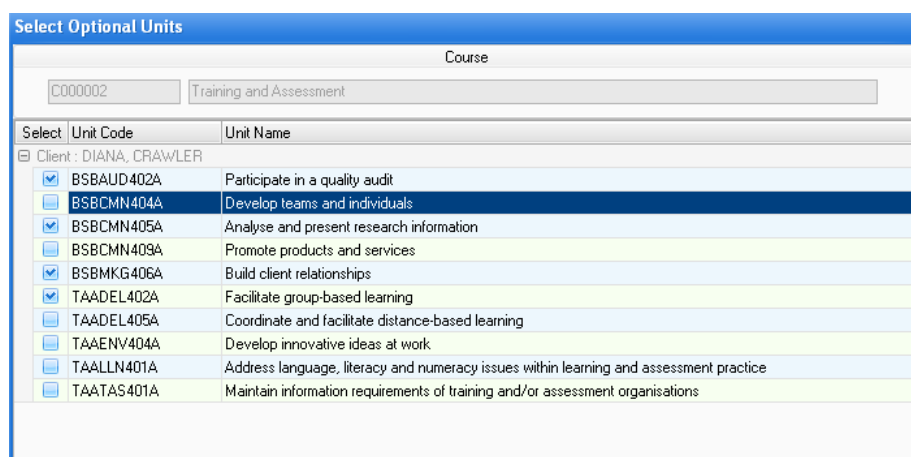
■ Figure above - Print out of Roll

3.1.11. Modifying course optional units by enrolment

You can modify the optional units for a course by enrolment, rather than creating a new course for each course permutation.

To modify the optional units for a specific client, select the client in the course enrolments panel. Right click on the client name and select the **Modify optional units** option. The **Select optional units** screen will appear in a new window.

Select or unselect the checkboxes to set the optional units for this enrolment. When you have made your selections, click the **Done** button. The changes will be saved to the database.



■ Figure above - Select optional units for specified enrolment

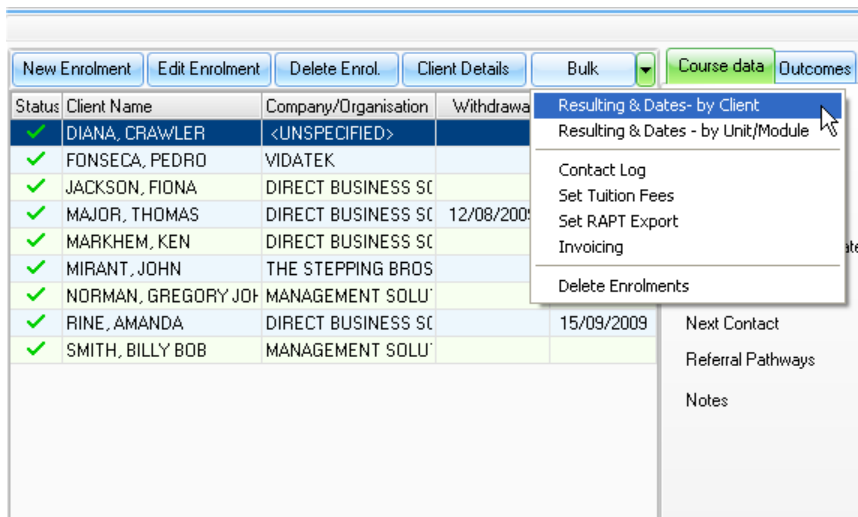
3.1.12. Editing client details

You can access the details of a selected client from within the course enrolments panel by selecting the **Client details** tab. The **Clients** screen will open in a new window.

To learn more about editing client details, see [Editing an existing client record](#).

3.1.13. Bulk functions

PowerPro enables you to complete a number of enrolment and results actions on a bulk basis. You can perform these actions by clicking the **Bulk** button in the course enrolments panel. A dropdown list of menu options will appear.



■ Figure above - Course enrolments panel showing Bulk dropdown list

3.1.13.1. Awarding client results by client

PowerPro enables you to award results by client or by unit/module.

To award results by unit /module, see section 3.1.13.2.

To award results by client, select the relevant course from the course list panel, then click the **Bulk** button and choose the 'Resulting & Dates – by Client' option. The **Bulk resulting** screen will appear.

Select the checkboxes for each unit or module you will be giving the selected client a particular result (e.g. competent, credit transfer, discontinued, etc.). Click the **All Units** button to select all the checkboxes automatically.

Select the checkboxes to set the start date and outcome date, and then choose the result from the dropdown list.

Bulk resulting: Certificate IV - Training and Assessment (C000002)

Client Name:

Unit/Module list for above Client

Code	Unit/Module Name	Start	Outcome/Result	Out. Date	Set
BSBAUD402A	Participate in a quality audit	1/03/2010	Competent	15/06/2010	<input checked="" type="checkbox"/>
BSBCMN405A	Analyse and present research information	10/08/2009			<input checked="" type="checkbox"/>
BSBMKG406A	Build client relationships	10/08/2009			<input checked="" type="checkbox"/>
TAAASS401A	Plan and organise assessment	10/08/2009			<input checked="" type="checkbox"/>
TAAASS402A	Assess competence	10/08/2009			<input checked="" type="checkbox"/>
TAAASS403A	Develop assessment tools	10/08/2009			<input checked="" type="checkbox"/>
TAAASS404A	Participate in assessment validation	10/08/2009			<input checked="" type="checkbox"/>
TAADEL401A	Plan and organise group-based delivery	10/08/2009			<input checked="" type="checkbox"/>
TAADEL402A	Facilitate group-based learning	10/08/2009			<input checked="" type="checkbox"/>
TAADEL403A	Facilitate individual learning	10/08/2009			<input checked="" type="checkbox"/>
TAADEL404A	Facilitate work-based learning	10/08/2009			<input checked="" type="checkbox"/>
TAADES401A	Use Training Packages to meet client needs	10/08/2009			<input checked="" type="checkbox"/>
TAADES402A	Design and develop learning programs	10/08/2009			<input checked="" type="checkbox"/>
TAAENV401A	Work effectively in vocational education and training	10/08/2009			<input checked="" type="checkbox"/>
TAAENV402A	Foster and promote an inclusive learning culture	10/08/2009			<input checked="" type="checkbox"/>
TAAENV403A	Ensure a healthy and safe learning environment	10/08/2009			<input checked="" type="checkbox"/>

Set Start Date:

Set Outcome and Outcome Date:

Enforce Start Date/Outcome Date Compatibility

■ **Figure 2. Bulk resulting screen for awarding client results by client option**

Click the **Set** button to apply the settings and provide a result for this client for the selected unit/modules. The selected outcome will appear in the Outcome/Result column and the date this outcome was set will appear in the Out. Date column.

To apply another result for other units or modules for this client, again select the corresponding checkboxes, enter the dates and select the outcome. Once you have finished resulting the client, click the **Next Client** button to repeat the process for the next client enrolled in this course.

NOTE: By selecting the 'Enforce Start Date/Outcome Date Compatibility' checkbox, you can ensure the system will not accepted entries where the start date of a unit is after the awarded outcome date. This is a requirement for RAPT/AVETMISS reporting is to ensure relational compatibility.

3.1.13.2. Awarding client results by unit/module

PowerPro enables you to award results by client or by unit/module.

To award results by client, see section 3.1.13.1.

To award results by unit/module, select the relevant course from the course list panel, then click the **Bulk** button and choose the 'Resulting & Dates – by Unit/Module' option. The **Bulk resulting** screen will appear.

Select the checkboxes for each client you will be giving a particular result for the selected unit or module (e.g. competent, credit transfer, discontinued, etc.). Click the **All Clients** button to select all the checkboxes automatically.

Select the checkboxes to set the start date and outcome date, and then choose the result from the dropdown list.

Bulk resulting: Certificate IV in Training and Assessment (C000002)

Unit/Module: BSBAUD402A - Participate in a quality audit Next Unit

Clients enrolled in above Unit/Module

Client Name	Start	Current Outcome/Result	Out. Date	Set
DIANA, CRAWLER	1/03/2010	Competent	15/06/2010	<input type="checkbox"/>
FONSECA, PEDRO	1/03/2010	Competent	15/06/2010	<input type="checkbox"/>
MIRANT, JOHN	1/03/2010	Competent	15/06/2010	<input type="checkbox"/>

All Clients

Set Start Date
 Set Outcome and Outcome Date

1/03/2010 Competent 15/06/2010

Enforce Start Date/Outcome Date Compatibility

Set Close

■ **Figure 3. Bulk resulting screen for awarding client results by unit/module option**

Click the **Set** button to apply the settings and provide a result for these clients for the selected unit or module. The selected outcome will appear in the Outcome/Result column and the date this outcome was set will appear in the Out. Date column.

To apply another result for other clients who are enrolled in the selected unit or module, again select the corresponding checkboxes, enter the dates and select the outcome. Once you have finished resulting clients for this unit or module, click the **Next Unit** button to repeat the process for the next unit or module in this course.

NOTE: By selecting the 'Enforce Start Date/Outcome Date Compatibility' checkbox, you can ensure the system will not accepted entries where the start date of a unit is after the awarded outcome date. This is a requirement for RAPT/AVETMISS reporting is to ensure relational compatibility.

3.1.13.3. Creating a contact log entry

To create a bulk contact log entry, select the relevant course from the course list panel, then click the **Bulk** button and choose the 'Contact Log' option. The **Bulk contact log** screen will appear.

Choose which clients this contract log applies to by selecting or unselecting the corresponding checkboxes.

Enter data for all mandatory fields (labelled in red) and any other fields as relevant.

Once you have entered the required information, click the **OK** button to save this contact log entry.

3.1.13.4. Set tuition fees

To set the tuition fees for units or modules for each client, select the relevant course from the course list panel, then click the **Bulk** button and choose the 'Set Tuition Fees' option. The **Set tuition fees** screen will appear.

Select the checkboxes for each unit or module that will have the same fee for the selected client, then enter this amount in the 'Set tuition fee to' field. Click the **All Units** button to select all the checkboxes automatically.

Click the **Set** button to apply this fee for this client and the selected unit/modules. The amount will appear in the Tuition Fee column.

To apply a different tuition for other units or modules for this client, again select the corresponding checkboxes, then enter the amount in the 'Set tuition fee to' field. Once you have finished applying a tuition fee for units and modules for this client, click the **Next Client** button to repeat the process for the next client enrolled in this course.

3.1.13.5. Set RAPT export

To set the RAPT data to be exported for a particular course, select the relevant course from the course list panel, then click the **Bulk** button and choose the 'Set RAPT export' option. The **Set RAPT export** screen will appear.

Choose which clients the data export will apply to by selecting or unselecting the corresponding checkboxes.

Once you have made your selection, click the **Set** button to set the clients whose RAPT will be exported. When you have finished selecting RAPT data to be exported, click the **Close** button to return to the **Enrolments and Results** screen.

3.1.13.6. Invoicing clients

To invoice clients in bulk for a particular course, select the relevant course from the course list panel, then click the **Bulk** button and choose the 'Invoicing' option. The **Bulk Invoice** screen will appear.

Select the clients to invoice by selecting or unselecting the corresponding checkboxes. Click the **Next** button.

Enter data for all mandatory fields (labelled in red) and any other fields as relevant. Select the invoice template to be used from the Template dropdown list.

Once you have entered the required information, click the **Finish** button to save this invoicing information and the invoices will be ready for printing and sending to these clients.

For more information about Invoices and Payments, see section 10.

3.1.13.7. Delete enrolments

To delete course enrolments in bulk for a particular course, select the relevant course from the course list panel, then click the **Bulk** button and choose the 'Delete enrolments' option. The **Bulk enrolment delete** screen will appear.

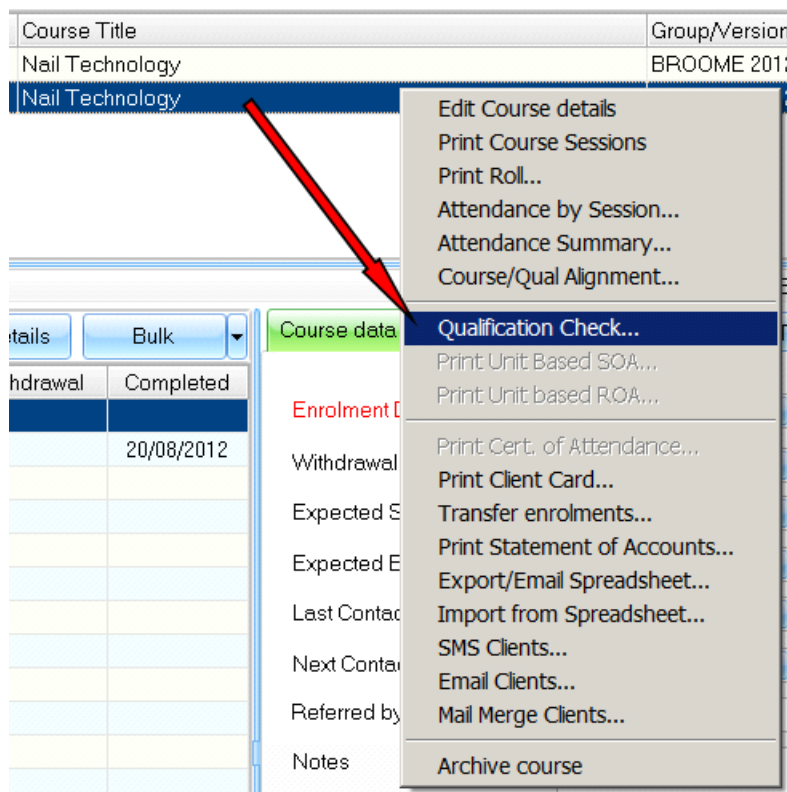
Select the clients to have their enrolment in the course deleted by selecting or unselecting the corresponding checkboxes. Click the **Apply** button to delete these enrolments.

When you have finished selecting clients to have their enrolment in the course deleted, click the **Close** button to return to the **Enrolments and Results** screen.

3.1.14. Printing Certificates and Statements of Attainment (full qualification courses)

To print Certificates and Statements of Attainment you need to conduct a **qualification check**(for a client or for a group of clients). This checks if the client(s) have completed the units required for a Qualification (e.g. Diploma of Business). The units required are specified in Qualification rules (see relevant chapter in this manual).

To conduct a qualification check, right-click on the Course (within Enrolments and Results) and select the relevant option:



■ Figure above - Check course participants against a qualification rule

A new window will pop-up showing all participants in the course flagged with a red cross or a yellow star. The yellow star sign indicates students eligible for a Certificate and for a Transcript of Results:

Qualification Check

Scope

Client Scope:

Qualification Rule

List Inactive Qualification Rules

Select Qualification Rule

Client Name	Core	Elective	Total Mis...
✘ COSTEX, LIZ	0/10	1/2	11
★ CRAWLER, DIANA	10/10	2/2	0
✘ DINO, SHARON	0/10	1/2	11
✘ DORES, MARIA	0/10	1/2	11
✘ HILL, SARAH	0/10	1/2	11
✘ KALPINSKY, JANINE	0/10	1/2	11
✘ MARTINEZ, MONICA	0/10	1/2	11
✘ MARY, ROSE	0/10	1/2	11
✘ MONKEY, JANE	0/10	1/2	11
✘ RIPPER, SAMANTHA	0/10	1/2	11
✘ SMART, ALISON	0/10	1/2	11
✘ SPINER, MOONA	0/10	1/2	11

Re-calculate All Print AQF Document

Close

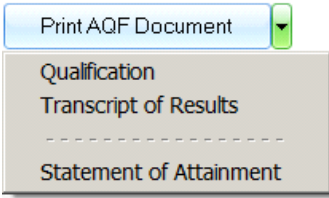
■ Figure above – Qualification check for a group of students

Clients flagged with a red cross are not eligible for a certificate (Qualification) but may be eligible for a Statement of Attainment if they have completed at least one unit from the Qualification. Please see table below:

Symbol	Meaning	Notes
★	Qualification completed	Client is eligible for a Certificate and a Transcript of Results for this Qualification
✘	Qualification not completed	Client is eligible for a Statement of Attainment if he/she has achieved at least one unit of this Qualification (as per relevant Qualification Rule – see relevant chapter on this manual)

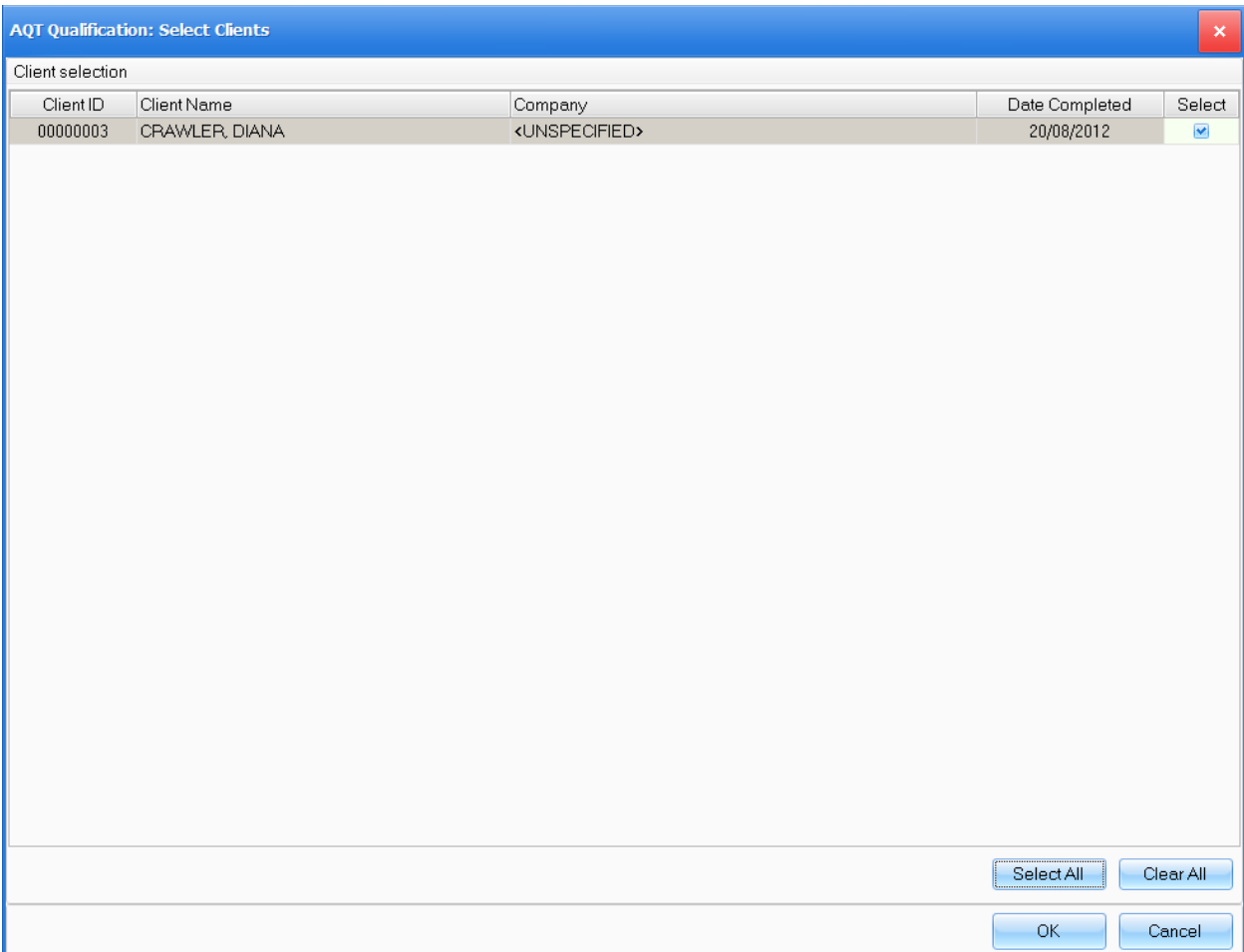
■ **Table above –Qualification check symbols**

To print Certificates, Statements of Attainment and Transcripts of Results press the **Print AQF Document** dropdown button and select the relevant option from the menu:



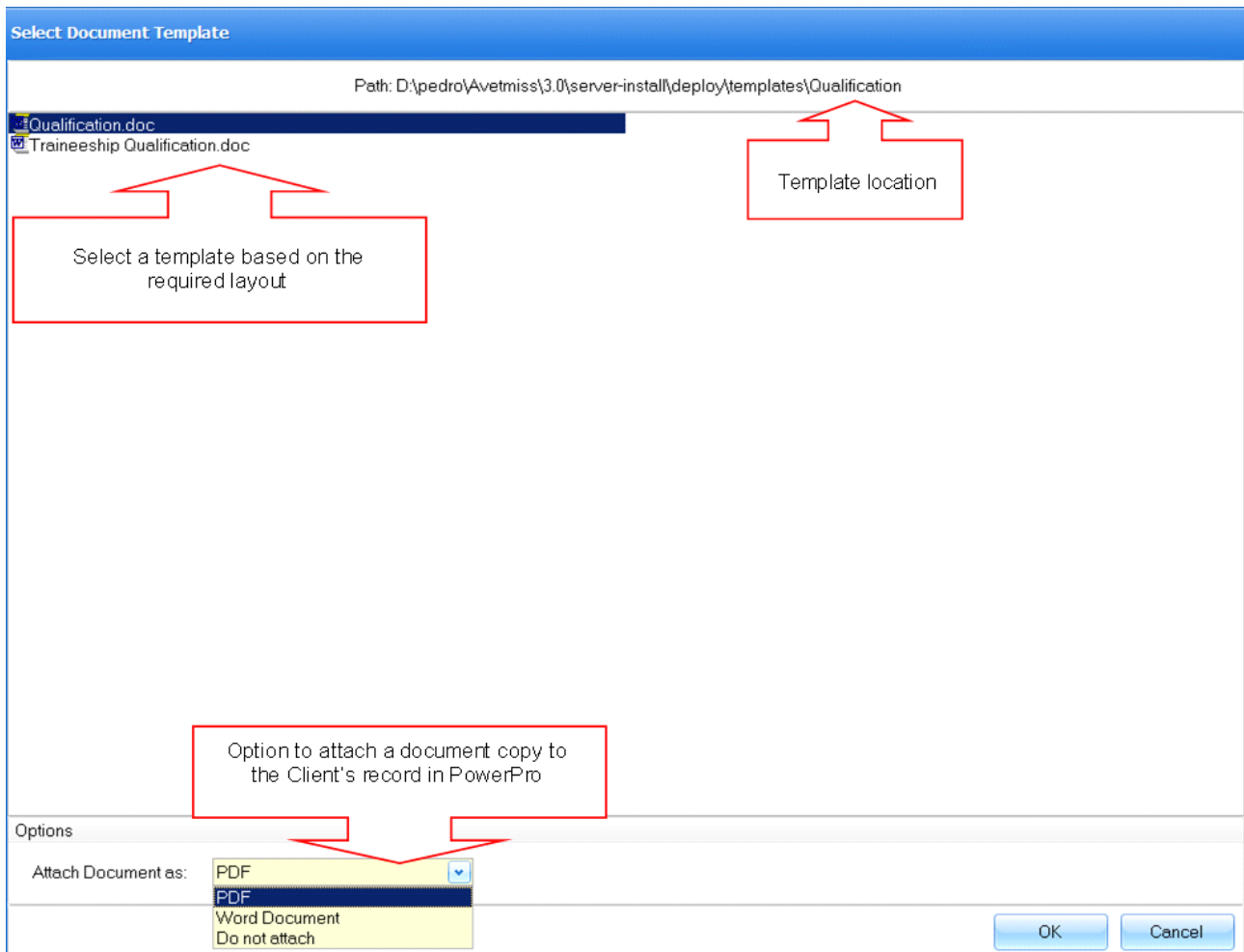
■ **Figure above – Print AQF Document menu**

Selecting **Qualification** from the above menu will bring up a new window listing only Clients (from this course/group) eligible for that document. Adjust the Client selection using the **select** checkbox column if required:



■ **Figure above – Adjust Client selection before printing your certificates**

This example is quite straight-forward – there is only one eligible client. Press **OK** to proceed. A new window (**Select Document Template**) allows you to select the template to be used as well as the option of attaching a copy of the document (Certificate) to the Client record in PowerPro:



■ Figure above – User options when printing certificates

Finally press **OK** to generate the Certificate(s) as per Client selection and user options.

Use the procedure described above, and select the relevant option from the **Print AQF Document** menu to print Statements of Attainment and Transcripts of results.

3.1.15. Printing Statements of Attainment (short courses)

The process to print Statements of Attainment for short courses (accredited course but not a full qualification course) is simpler since it does not involve a Qualification rules. The Statement of Attainment for short courses only lists the units completed by each student within a particular course.

To print Statements of Attainment for a short course, right-click on the Course (within Enrolments and Results) and select **Print Unit based SOA**:

Course ID	National Code	Qualification Level	Course Title	Group
C000004	SIT20207	Course	Certificate II in Hospitality	PSA

Status	Client Name	Company/Organisation	Withdrawal	Completed
✓	COSTA, MANUEL	<UNSPECIFIED>		28/08/2012
✓	TRUEMAN, CHARLES	<UNSPECIFIED>		28/08/2012
✓	ZORN, THOMAS	<UNSPECIFIED>		

- Edit Course details
- Print Course Sessions
- Print Roll...
- Attendance by Session...
- Attendance Summary...
- Course/Qual Alignment...
- Qualification Check...
- Print Unit Based SOA...**
- Print Unit based ROA...
- Print Cert. of Attendance...
- Print Client Card...
- Transfer enrolments...
- Print Statement of Accounts...
- Export/Email Spreadsheet...
- Import from Spreadsheet...
- SMS Clients...
- Email Clients...
- Mail Merge Clients...
- Archive course

■ Figure above –Printing a Statement of Attainment for a short course

A new window will pop-up showing clients who completed any units in this course:

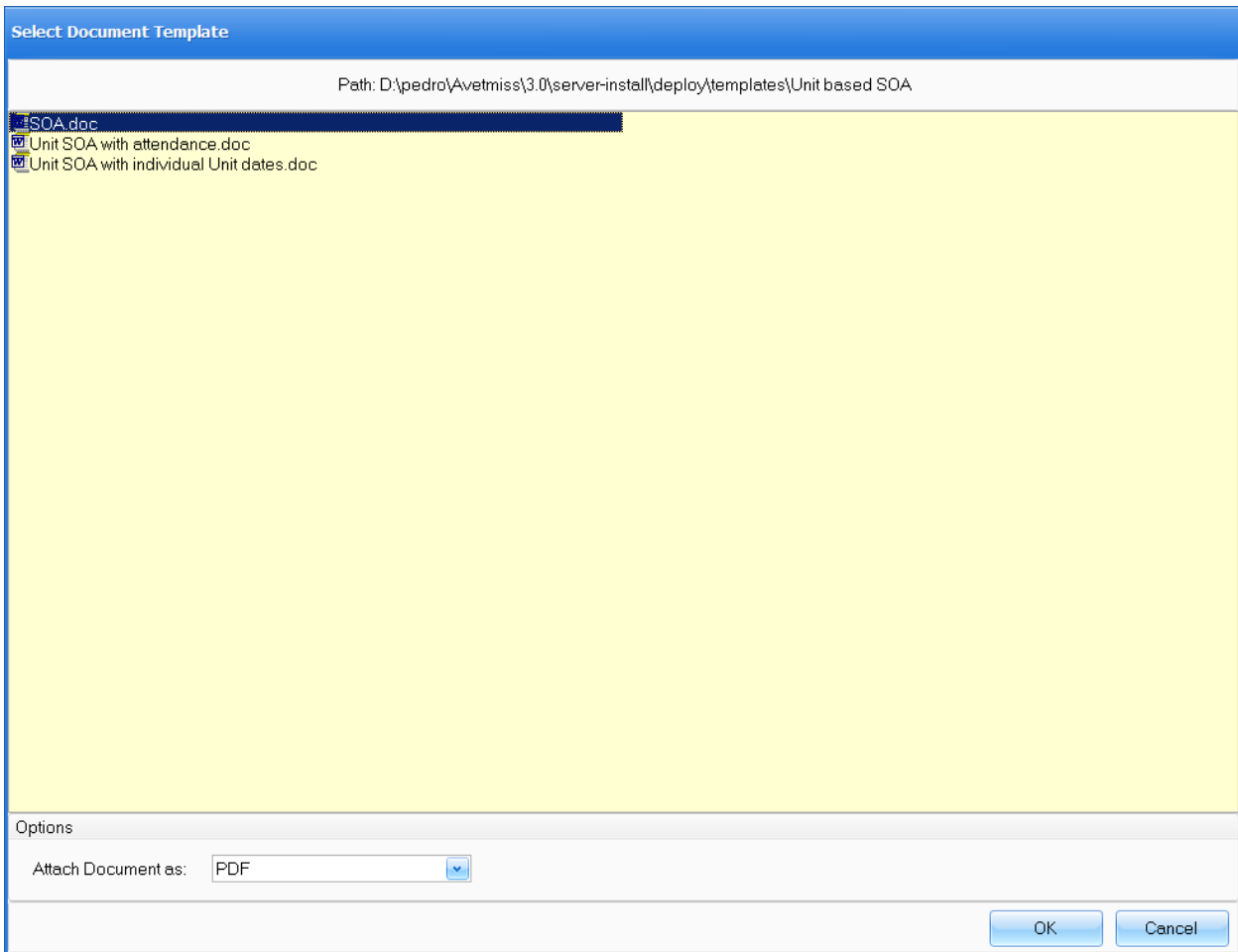
Statement of Attainment - Report parameters

Client selection

Client ID	Client Name	Company	Date Completed	Select
00000025	COSTA, MANUEL	<UNSPECIFIED>	28/08/2012	<input type="checkbox"/>
00000022	TRUEMAN, CHARLES	<UNSPECIFIED>	28/08/2012	<input checked="" type="checkbox"/>

■ **Figure above – Adjust Client selection before printing your statements of attainment**

Adjust the Client selection using the **select** checkbox column if required and press **OK** to proceed. A new window (**Select Document Template**) allows you to select the template to be used as well as the option of attaching a copy of the document (Statement of Attainment) to the Client record in PowerPro:



■ **Figure above – User options when printing certificates**

Finally press **OK** to generate the Statement(s) as per Client selection and user options.

Note: You need to have Microsoft Word (any version) installed to generate AQF Documents in PowerPro RTO. PowerPro RTO uses Microsoft Word to generate these documents via Mail Merge.

4. Qualification rules

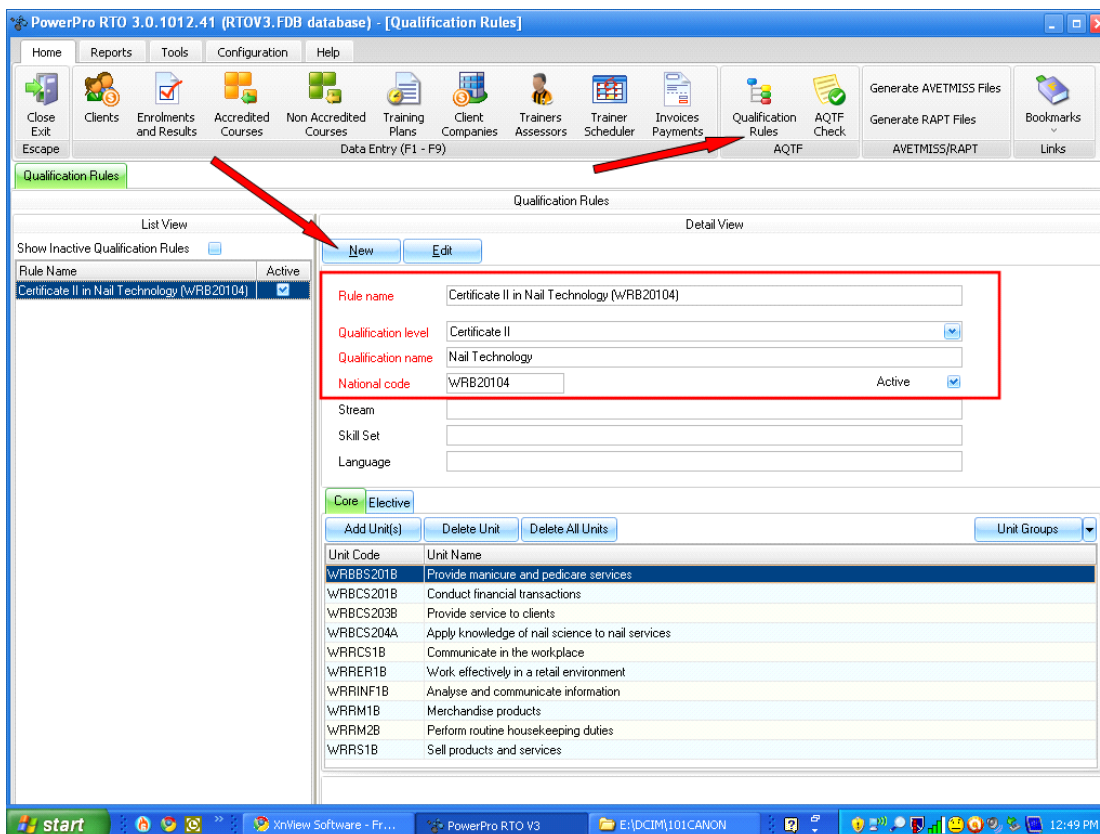
This section is only relevant if your RTO is scoped to deliver full qualifications or accredited courses (e.g. TAA40110, 91499NSW). If you do only deliver short courses (Statements of Attainment) you do not need to enter/configure qualification rules.

Similarly to the packaging rules in Training Packages, a Qualification Rule enables the system to determine whether students/clients are eligible for a Qualification (if they complete the required units as defined in the Qualification Rule) or not. It is critical to have these set up correctly as will determine the type of document to be issued: Qualification or Statement of Attainment.

Use this area of the system to record each Qualification delivered (e.g. Certificate II in Business, Diploma of Media, etc).

4.1.1. Adding a new qualification rule

To create a new Qualification Rule, click the **New** button:



■ Figure above - Qualification Rule

Fill in the header fields (red fields are required) then press **Save** to apply:

Accredited Courses Qualification Rules

Qualification Rules

List View Detail View

Show Inactive Qualification Rules

Rule Name Certificate II in Nail Technology (WRB20104) Active

Save Cancel

Rule name Certificate IV in Hospitality (SIT40307)

Qualification level Certificate IV

Qualification name Hospitality

National code SIT40307 Active

Stream

Skill Set

Language

Core Elective

Add Unit(s) Delete Unit Delete All Units

Unit Code Unit Name

■ Figure above - Qualification Rule header fields

Now add the units required by pressing **Add Unit**:

Add Units to Qualification Rule

Filter by Unit Code pattern SIT List inactive units

Unit Code	Unit Name
SITHACS001B	Provide accommodation reception services
SITHACS002A	Conduct night audit
SITHACS002B	Conduct night audit
SITHACS003A	Provide porter services
SITHACS004A	Provide housekeeping services to guests
SITHACS004B	Provide housekeeping services to guests
SITHACS005A	Prepare rooms for guests
SITHACS005B	Prepare rooms for guests
SITHACS006A	Clean premises and equipment
SITHACS007A	Launder linen and guest clothes
SITHACS007B	Launder linen and guest clothes
SITHACS008B	Provide valet service
SITHASC002A	Produce appetisers and snacks for Asian cuisines
SITHASC003A	Prepare stocks and soups for Asian cuisines

Add as Core Add as Elective Import Units

Units to add to the Qualification Rule		
Unit Code	Unit Name	Core/Elective
<No Units have been selected>		

Remove

OK Cancel

■ Figure above - Qualification Rule - Add units

A list of units is displayed; these are all the units currently active in your database. Select the relevant units and add them as Core or Elective depending on whether the unit is required or can be selected amongst other units. When you are done with the unit selection click **OK** to finally attach the units to the qualification rule

Should you need additional units please use the **Import Units** button to launch this function.

4.1.2. Superseded qualification rule

At some stage some of your training package(s) will become superseded. You will need to add the new qualifications to the system and perhaps make the superseded ones inactive. To do this, select the superseded qualification from the list on the left side, click **Edit** and then uncheck the **Active** check box.

5. Accredited Courses

Use the Accredited Courses window to create/modify/clone any courses based on units of competence. These courses can either be AQTF qualifications, licensing courses (e.g. First Aid, RSA) or accredited courses (any of those with a National code such as 1234QLD). From the **Accredited Courses** screen you can also manage the mandatory and optional units in a course, maintain the list of units in the system and view/modify unit details.

The **Accredited Courses** screen has three panels:

- unit based courses (list of courses)
- available units (list of units in the system)
- course units (list of units attached to the selected course).

The course list panel appears at the top of the screen, just below the main menu. The available units panel appears below the unit based courses panel on the left, and the course units panel appears on the right.

Course list panel

Course ID	National Code	Qualification Level	Course Title	Version
C000007	BSB51004	Diploma	Business (Frontline Management)	FLM 2010 NIGHT CO
C000006	HLTFA301B	A Course	Apply First Aid	DEC 2009
C000002	TAA40104	Certificate IV	Training and Assessment	TAA 2009 PUBLIC
C000001	BSB51004	Diploma	Business (Frontline Management)	FLM 2009 VIDATEK

Available units panel

Unit Code	Unit Name	Active
BSBAUD402A	Participate in a quality audit	<input checked="" type="checkbox"/>
BSBCMN404A	Develop teams and individuals	<input checked="" type="checkbox"/>
BSBCMN405A	Analyse and present research information	<input checked="" type="checkbox"/>
BSBCMN403A	Promote products and services	<input checked="" type="checkbox"/>
BSBFLM302A	Support leadership in the workplace	<input checked="" type="checkbox"/>
BSBFLM303A	Contribute to effective workplace relationships	<input checked="" type="checkbox"/>
BSBFLM501B	Manage personal work, priorities and professional development	<input checked="" type="checkbox"/>
BSBFLM502A	Provide leadership in the workplace	<input checked="" type="checkbox"/>
BSBFLM503B	Manage effective workplace relationships	<input checked="" type="checkbox"/>
BSBFLM504A	Facilitate work teams	<input checked="" type="checkbox"/>
BSBFLM505B	Manage operational plan	<input checked="" type="checkbox"/>
BSBFLM506B	Manage workplace information systems	<input checked="" type="checkbox"/>
BSBFLM507B	Manage quality customer service	<input checked="" type="checkbox"/>
BSBFLM509B	Facilitate continuous improvement	<input checked="" type="checkbox"/>
BSBFLM510B	Facilitate and capitalise on change and innovation	<input checked="" type="checkbox"/>
BSBFLM511B	Develop a workplace learning environment	<input checked="" type="checkbox"/>
BSBFLM512A	Ensure team effectiveness	<input checked="" type="checkbox"/>
BSBFLM513A	Manage budgets and financial plans within the work team	<input checked="" type="checkbox"/>
BSBFLM514A	Manage people	<input checked="" type="checkbox"/>
BSBFLM609B	Facilitate continuous improvement	<input checked="" type="checkbox"/>
BSBMGT505A	Ensure a safe workplace	<input checked="" type="checkbox"/>
BSBMKG406A	Build client relationships	<input checked="" type="checkbox"/>

Course units panel

M/O	Unit Code	Unit Name
<input checked="" type="checkbox"/>	BSBFLM501B	Manage personal work, priorities and professional development
<input checked="" type="checkbox"/>	BSBFLM503B	Manage effective workplace relationships
<input checked="" type="checkbox"/>	BSBFLM505B	Manage operational plan
<input checked="" type="checkbox"/>	BSBFLM507B	Manage quality customer service
<input checked="" type="checkbox"/>	BSBFLM510B	Facilitate and capitalise on change and innovation
<input checked="" type="checkbox"/>	BSBFLM511B	Develop a workplace learning environment
<input checked="" type="checkbox"/>	BSBFLM512A	Ensure team effectiveness
<input checked="" type="checkbox"/>	BSBFLM513A	Manage budgets and financial plans within the work team
<input checked="" type="checkbox"/>	BSBFLM514A	Manage people
<input checked="" type="checkbox"/>	BSBFLM609B	Facilitate continuous improvement
<input checked="" type="checkbox"/>	BSBMGT505A	Ensure a safe workplace

■ Figure above - Accredited courses screen

When a course is selected in the unit based courses panel, it is possible to add or delete units to or from the course units listed in the available units panel.

5.1.1. Adding a new accredited course

To add a new course to the database, click the **New Course** button to open a **Course details** window which contains a number of tabs (see below) for adding new course information.

Tab	Purpose
Main info	Displays general course information including course ID, qualification/level, name, version, dates and training organisation. Fields written in red are mandatory.
Trainers/Resources	Displays trainers and resources used for the course.
Invoicing	Displays invoicing information, including by course or unit, GST option and total fee (exclusive of GST).
AVETMISS	Displays Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS) information for the course.
RAPT	Displays Resource Allocation Program for Training (RAPT) identification code for the course.
HR	Displays professional development (PD) points upon course completion.

■ **Table above - Accredited course tabs**

To begin adding a new course to the database, select the **Main Info** tab. The input fields will contain no data.

The **Course ID** field will appear grey and cannot be altered because the computer will automatically assign a Course ID.

Enter data for all mandatory fields (labelled in **red**) and any other fields as relevant.

To the right of the **Course ID** field is a **Qualification** check box. If the course offers no qualification, leave the box empty. The **Qualification/Level** field below will appear grey and contain the words 'A course'. If the course does offer a qualification, check the **Qualification** box and scroll through the options in the dropdown list in the **Qualification/Level** field below to select the appropriate one.

■ Figure above New course screen

In the **National Code** field, enter the appropriate national code for the qualification selected above. This can be left blank if there is no qualification.

Enter the course version in the **Version** field.

Select the course's **Start Date** and **End Date** from the dropdown calendars.

In the **Completion Document** field, to enter a completion document for a course with no qualification, select the appropriate document from the dropdown list. If the course has a qualification, a completion document will be automatically assigned when you selected a particular qualification. This cannot be edited.

To choose a training organisation in the **Training Org.** field, click the dropdown list and select the desired trainer. To the right of this field is a green 'cross' icon that opens a window when clicked. The window contains fields for inputting a training organisation's contact information. Enter or edit the mandatory fields (denoted by a red circle) and click **Save** to retain the information or **Cancel** and **Yes** to abandon changes and return to the previous window. Click **Delete** to remove this training organisation from your database.

Use the **Delivered at** field to specify the course's location. You can click on an option in the dropdown list or create and a location by clicking the green 'cross' icon on the right of this field.

Click the **Trainers/Resources** tab to add details of course trainers and resources. Under the left panel, click **Add Trainer** or **Remove Trainer** to add or remove trainer and session details. To add, edit or remove course resources, under the right panel click **Add Resource**, **Edit Resource** or **Remove Resource**.

To enter invoicing information, click the **Invoicing** tab. Here, you can choose to invoice by course (most common option) or by unit of competence. You can also fill the **Fee Structure** table to assist with invoicing generation.

Course details

Main Info | Workflow | Scheduled Sessions | Attendance | Trainers/Resources | Docs | **Invoicing** | Company Invoices | Units | AVETMISS | RAPT | HR | Web | Quick stats

Course - Invoicing options

Invoice By: BY COURSE

Description	Unit Value	GST	Amount	Account No	Tax Code
Certificate IV in Music Text Books	\$80.00	\$8.00	\$88.00		
Certificate IV in Music - Enrolment fees	\$2,800.00	\$0.00	\$2,800.00		

\$2,888.00

Invoicing Figures	Companies	Clients	Total
Invoiced	\$0.00	\$0.00	\$0.00
Received	\$0.00	\$0.00	\$0.00
Outstanding	\$0.00	\$0.00	\$0.00

Course Description

OK Cancel

■ Figure above - New course screen - Invoicing tab

Select the **AVETMISS** tab to enter relevant Australian Vocational Education and Training Management Information Statistical Standard data for this course.

Select the **RAPT** tab to enter the Resource Allocation Program for Training data for this course. You can enter the CPD ID into the blank field, and specify whether the course is an apprenticeship/traineeship

Click the **HR** tab to enter the professional development (P.D.) points scored upon completion of the course.

To view course lists, click on the **List Courses** dropdown menu, and click on **Active courses**, **Archived courses**, or **Both** to display desired courses.

You can also enter **Pattern Match** and **Version** data in the fields on the top line of the unit based courses panel.

Once you have finished entering data for the new course, click the **Save** button. A new course record will be created in the database.

5.1.2. Editing an existing course

To view/modify course attributes just double-click on the relevant course in the course list panel. This will open the **Course details** window with the following tabs.

Tab	Purpose
Main info	Displays general course information including course ID, qualification/level, name, version, dates and training organisation. Fields written in red are mandatory.
Scheduled Sessions	Displays date, day, time, location, trainer and unit(s) studied.
Attendance	Displays and allows editing the student attendance for the course.
Trainers/Resources	Displays trainers and resources used for the course.
Docs	Displays a list of any documents attached to this course. Good document candidates are student and trainer signed class roles - do NOT use this to store course material/content documents
Invoicing	Displays invoicing information, including by course or unit, GST option and total fee (exclusive of GST).
Company invoices	Displays invoice and payment details.
Units	Displays units in the course.
AVETMISS	Displays Australian Vocational Education and Training Management Information Statistical Standard information (AVETMISS) for the course.
RAPT	Displays Resource Allocation Program for Training (RAPT) identification code for the course.
HR	Displays professional development (PD) points upon course completion.
WEB	Information about if and how the course is to be displayed online.
Quick stats	Displays enrolment statistics.

■ Table above - course tabs

Select the **Scheduled Sessions** tab to view and edit course session details. Here you can click **New Session** to create an extra session. You can input and edit relevant information in the **Trainer, Course, Units, Location** and **Caption** fields, and specify start and finish times for the session.

Select the **Company Invoices** tab to manage the creation or payment of any invoices for this course.

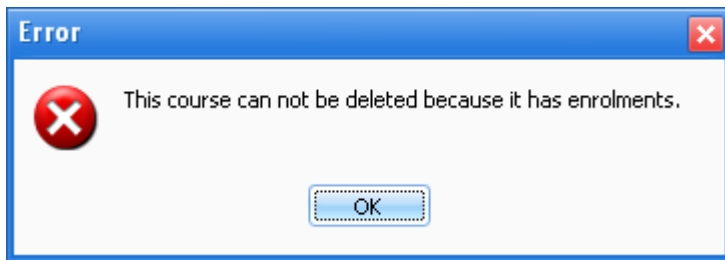
To view units in the course, select **Units** tab. This will display unit codes, names and dates. A red circle signifies a mandatory unit; a blue circle denotes an optional unit.

Clicking the **Quick Stats** tab displays important enrolment statistics at a glance.

5.1.3. Deleting an existing accredited course

Click the **Delete Course** button to remove a course.

A **Confirm action** dialogue box will appear to delete the course from the database.



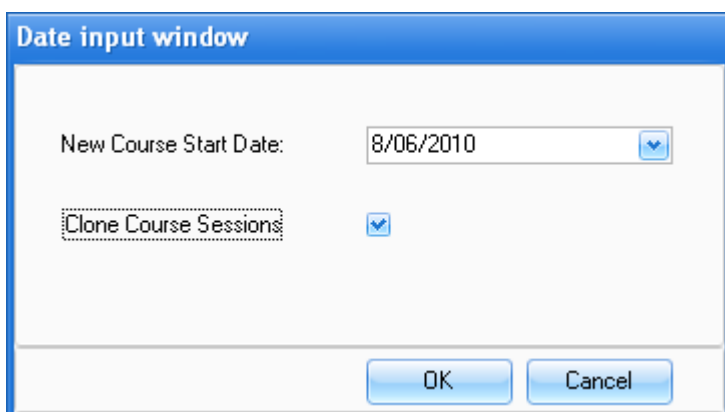
■ Figure above - Confirm action dialog box

NOTE: You cannot delete a course if it currently has students enrolled. Once this information has been deleted, it cannot be retrieved.

5.1.4. Clone an existing course

To create a new course identical to one already existing, click the **Clone Course** button. This enables you to duplicate a course already listed in the course list panel, complete with all information contained in the original (except for the clients/students).

A **Date input** window will appear prompting you to input the **New Course Start Date** and a check box to **Clone Course Sessions**. Checking this box will copy course sessions directly from the original course to the clone. The computer will automatically assign a Course ID and place the clone at the top of the list in the course list panel.



■ Figure above - Clone course date input window

5.1.5. Available units

The available unit's panel displays all units for all active courses, complete with Unit Code and Unit Name. To add one or more new units use the **Import Units from text file** function. If the unit is not present in the text file you can download the latest Units file from the **Bookmarks/NCVER All Units** menu, save it locally (e.g. My Documents) and then import from the newly downloaded text file. If you still can not locate/import the unit(s) you need you can click the **New unit** button, select the **Single unit** or **Multiple unit** option.

Clicking **Single unit** in the dropdown menu opens a **Unit information** window, in which you can enter required information into the vacant fields. Mandatory fields are marked in red.

There are also sections for **AVETMISS Information** and **State/Territory Specific** inputs. Click the **OK** button to add this to the Available Units list.

Selecting the Multiple Units option in the dropdown menu opens a window called **Add multiple units to the system**. Enter the Unit Code, Unit Name and course details. Add and delete units and add filter conditions using the icons at the bottom left of the screen.

Unit Code	Unit Name	Hours	Requal Period	Field of Education
BSBAUD402B	Develop teams	0	0	

■ Figure above - Add multiple units to a course screen

To help you locate a particular Unit, there is a **Search** box located above the list. To conduct a search, type a keyword into the box and click the **Apply** button.

There is also an option to display inactive units. To show inactive units, check the **Show inactive** box.

5.1.6. Edit course units

The course units panel displays units comprising the course highlighted in the course list panel. The units are colour coded with a red circle to denote a mandatory course, and a blue circle to indicate an optional unit.

Course units (9 Mandatory, 2 Optional)

Done Copy Qual Rule Units

M/O	Unit Code	Unit Name
●	BSBFLM501B	Manage personal work priorities and professional development
●	BSBFLM503B	Manage effective workplace relationships
●	BSBFLM505B	Manage operational plan
●	BSBFLM507B	Manage quality customer service
●	BSBFLM510B	Facilitate and capitalise on change and innovation
●	BSBFLM511B	Develop a workplace learning environment
●	BSBFLM512A	Ensure team effectiveness
●	BSBFLM513A	Manage budgets and financial plans within the work team
●	BSBFLM514A	Manage people
●	BSBFLM609B	Facilitate continuous improvement
●	BSBMGT505A	Ensure a safe workplace

■ Figure above - Course units panel - 'edit' mode

To add a course unit to the **Course units** list from the **Available units** list, click the **Edit Course Units** button. This will activate two green 'arrow' icons.

Click on the desired unit to select it, and then click the right 'arrow' icon. This will open a **Course unit information** window. Check and edit the details where necessary, then click the **OK** button. Repeat this process to add more units to the course.

When all desired units have been added, click the **Done** button.

To delete units from the **Course units** list, click the **Edit Course Units** button. This will activate two green 'arrow' icons. Click on the unit you want to remove and then click on the left 'arrow' icon, which will erase the unit from the **Course units** list. Repeat this process to delete more units from the **Course units** list, then click the **Done** button.

Click the **Copy Qual Rule Units** button to restructure a course by copying units associated with an existing qualification rule. For further details, see **Error! Reference source not found.**

NOTE: You must remove all enrolments before you can modify the qualification rules of an existing course.

6. Non-accredited Courses

The non-accredited courses component of PowerPro enables organisations to run in-house training courses that are not nationally accredited. Examples of non-accredited courses are employee inductions and Professional Development activities.

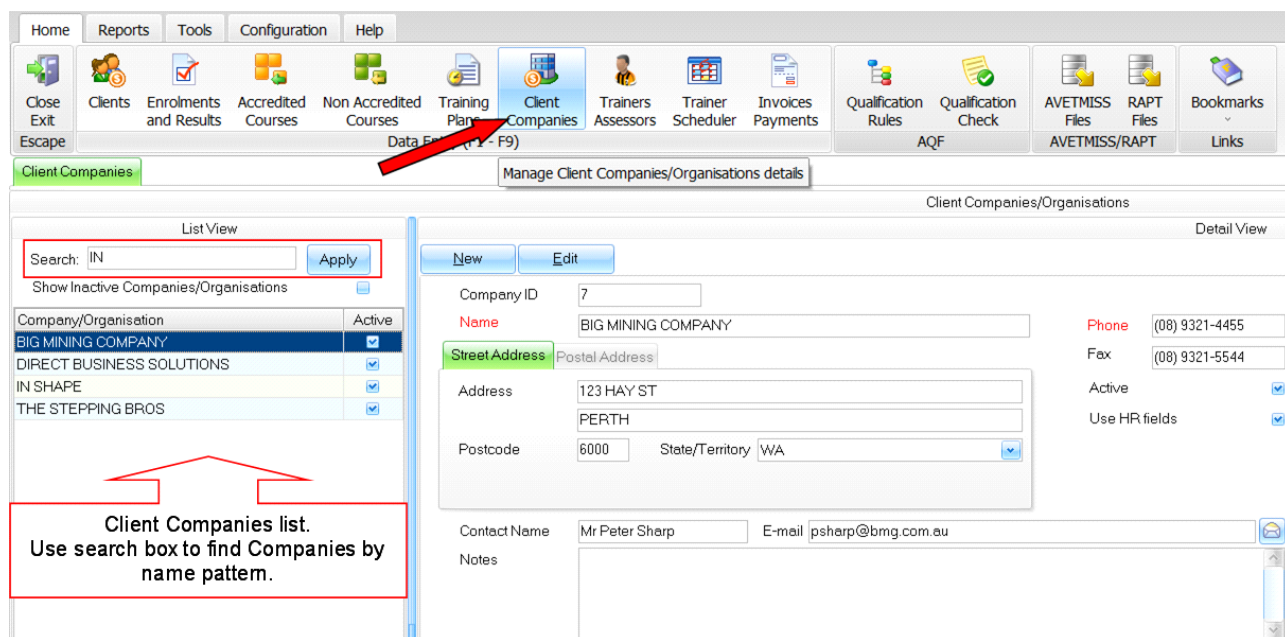
Non-accredited courses work in a very similar fashion to accredited courses except these courses are based on modules instead of units of competence. For that reason there is no option to import the modules, since these are your own modules they need to be entered manually into the system.

For assistance in administering non-accredited courses within PowerPro, refer to the corresponding section under accredited courses.

7. Client Companies

PowerPro RTO Client Companies are the employers of the students. Tracking this information allows reporting at the Company level which is vital if your organisation provides corporate training or Traineeships.

There is a top level menu button to access the Client Companies in PowerPro:



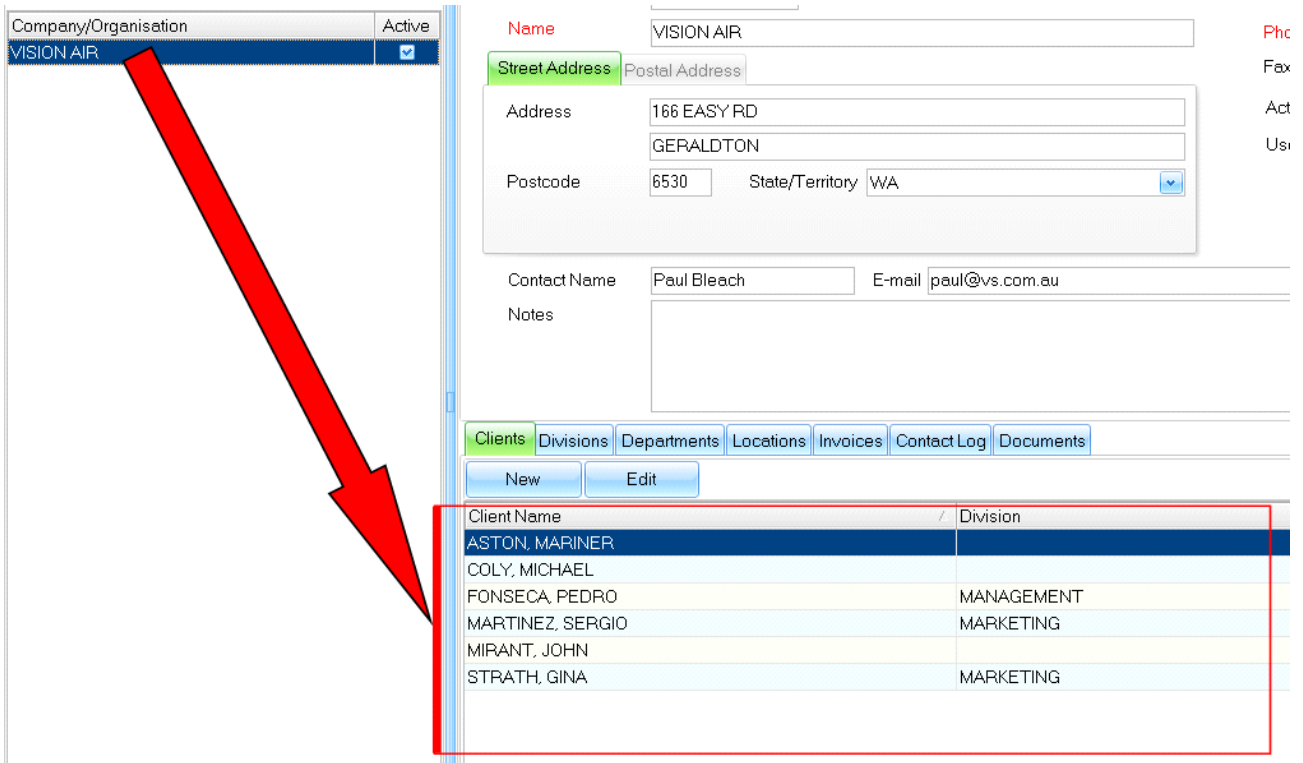
■ Figure above – Client Companies window

The left side of the window (**list view**) displays a list of all active Client Companies in the system. You can use the **Search** box to narrow the list of Companies listed in order to find the Company you are looking for.

The right side of the window shows the details of the current Company (the Company highlighted on the **list view**).

Companies can be created and maintained from the Client Companies window. Use the **New** and **Edit** buttons for that purpose.

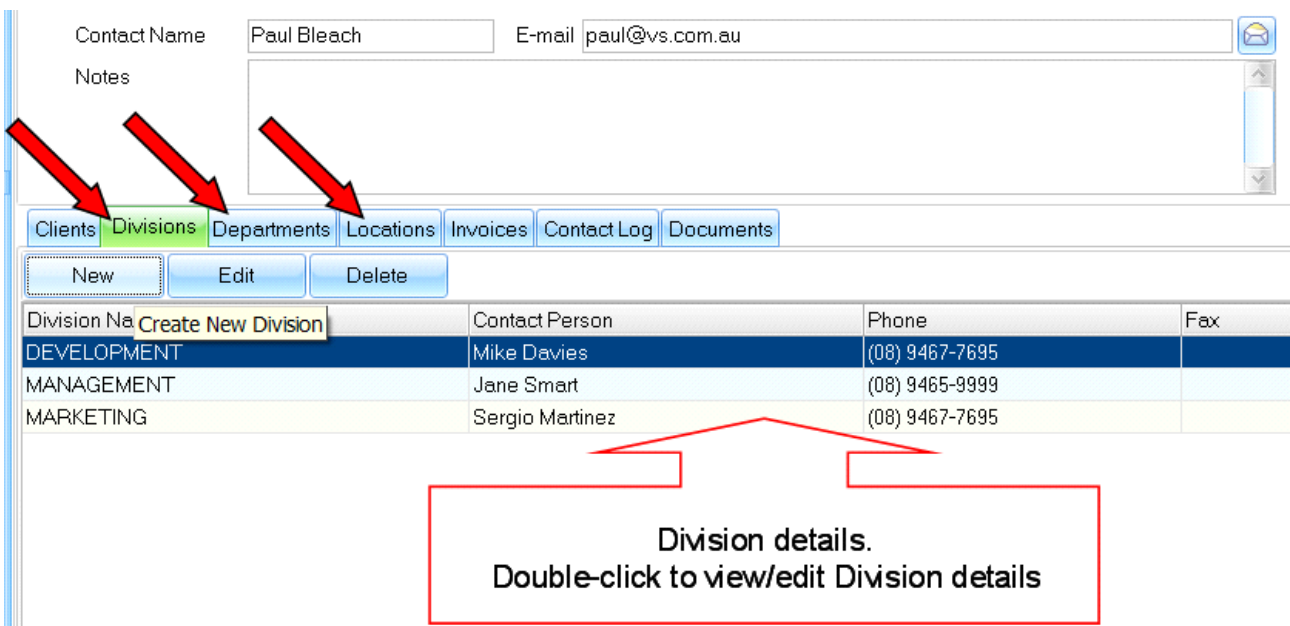
The **Clients** tab lists all Clients (Students) linked to the current Company (the one highlighted on the Client Company list – left side of the screen):



■ Figure above – Clients linked to a specific Client Company

7.1. Company Divisions, Departments and Locations

Each Client Company can have multiple Divisions, Departments and Locations. These field sets are organised in tabs. It's up to the RTO to decide which of these tabs to fill in:

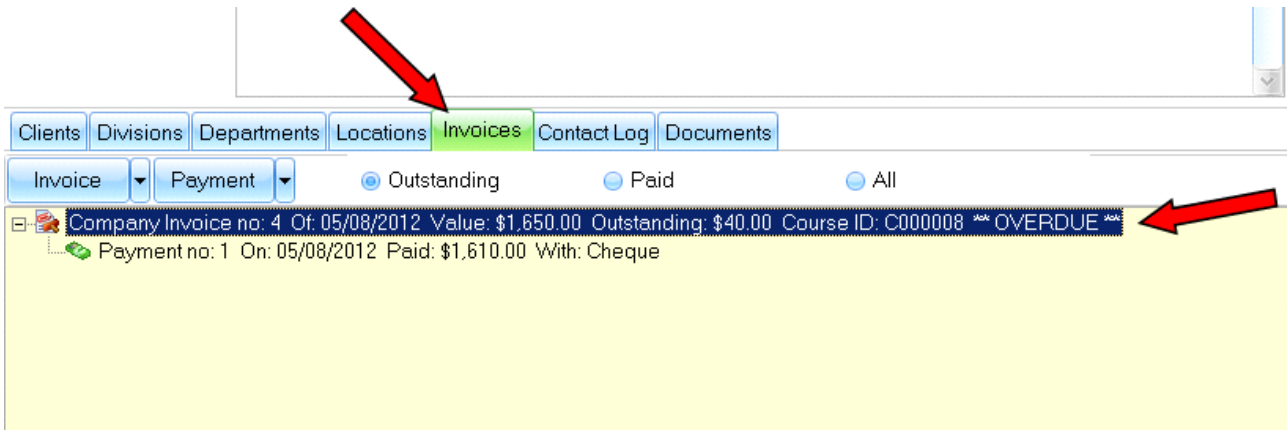


■ Figure above – Client Companies Divisions, Departments and Locations

7.2. Viewing/Editing Company Invoices

Company invoices are created from the Enrolments and Results window (please refer to the **Invoices and Payments** chapter on this manual).

Company invoices (and their payments) can be tracked in the Client Companies **Invoices** tab:



■ Figure above – Client Companies: invoice history

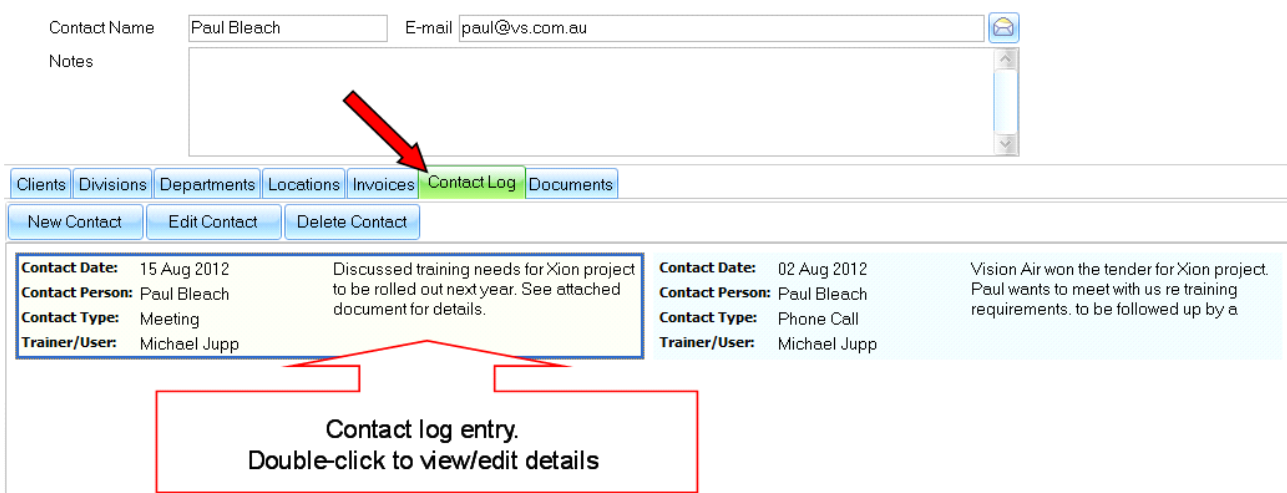
The **Outstanding/Paid/All** filters allow a filtered view of the company invoices based on the Invoice status.

Use the **Invoice** dropdown button to edit the highlighted invoice, Void the invoice or delete the invoice.

Use the **Payment** dropdown button to edit or to delete the highlighted payment.

7.3. Logging Company Contacts

Much like the **Client Contact Log**, the **Company Contact Log** is a multi-purpose company related event register. This can be used to save/track meeting decisions, phone calls, etc:

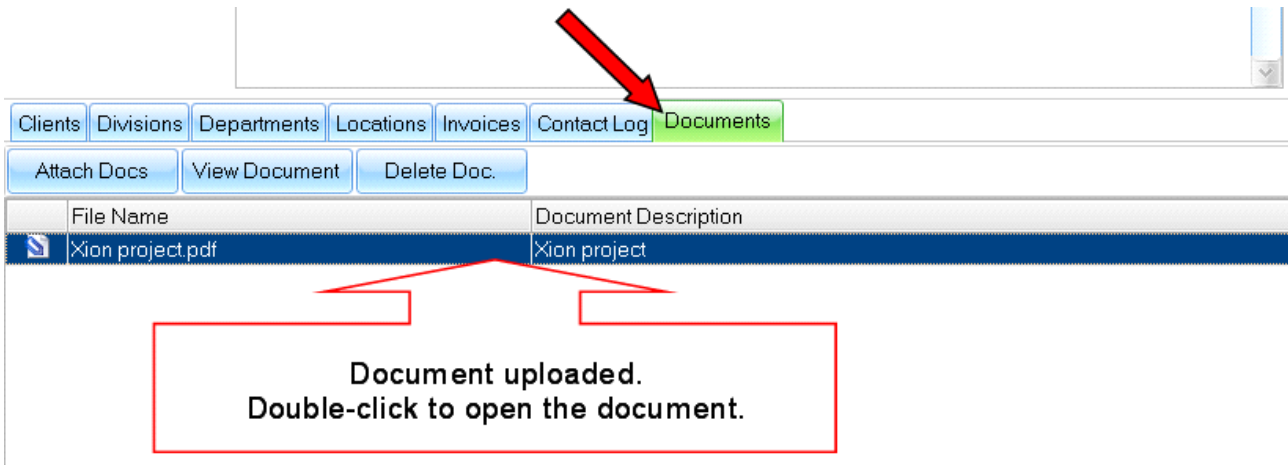


■ Figure above – Companies Contact Log

Contact Log entries are sorted by date - the most recent contacts/events are shown on top.

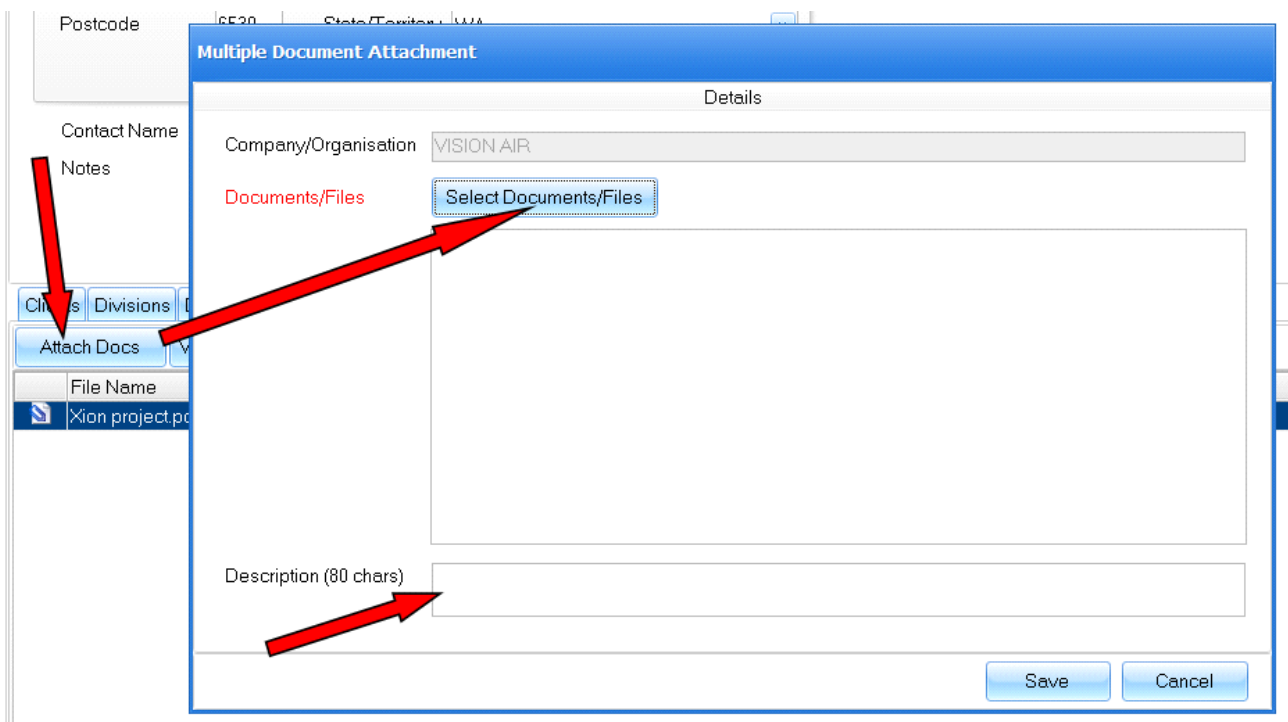
7.4. Attaching Company Documents

PowerPro has the ability to attach documents to Client Companies. Any relevant documents can be stored here for easy and centralised access. Using the user roles it is possible to specify which users should have access to view/open Company Documents.



■ Figure above – Companies Documents

To attach a document to a Company make sure you select the relevant company on the **list view** (left side of the **Client Companies** window). Then click on the **Attach Docs** button and select one or more documents to attach. Optionally add a description to the documents you are attaching:



■ Figure above – Attaching Company Documents

NOTE: Client Companies can also be accessed and created from the **Client** window:

Clients

Code	Match Name Pattern	Secondary ID	Company/Organisation
			VISION AIR

Code	Surname	Given Names	Secondary ID
00000001	STRATH	GINA	
00000002	MARTINEZ	SERGIO	
00000003	FONSECA	PEDRO	
00000006	MIRANT	JOHN	

Save Cancel Delete client

Main info Postal Address AVETMISS/RAPT Courses Outcomes achieved AQF Docs printed Invoices Contact Log

Code: 00000006 Secondary ID:

Surname: MIRANT Title:

Given names: JOHN

Address: 13 MAIN RD

Suburb: WANGARA Postcode Lookup


Postcode: 6018 State: WA

Company: VISION AIR


Division: <UNSPECIFIED>

Department: <UNSPECIFIED>

Location: <UNSPECIFIED>

Balance 

New Company



■ Figure above – Creating a Client Company from the Clients window

8. Trainers and Assessors

Use the **Trainers and Assessors** area to track information on Trainers and Assessors. Information includes Trainer contact details, Courses completed, induction date and any relevant documents.

The **Trainers and Assessors** screen has two panels:

- Trainer list (list of all active Trainers/Assessors in the system)
- Trainer details (details of Trainer/Assessor highlighted in Trainer list)

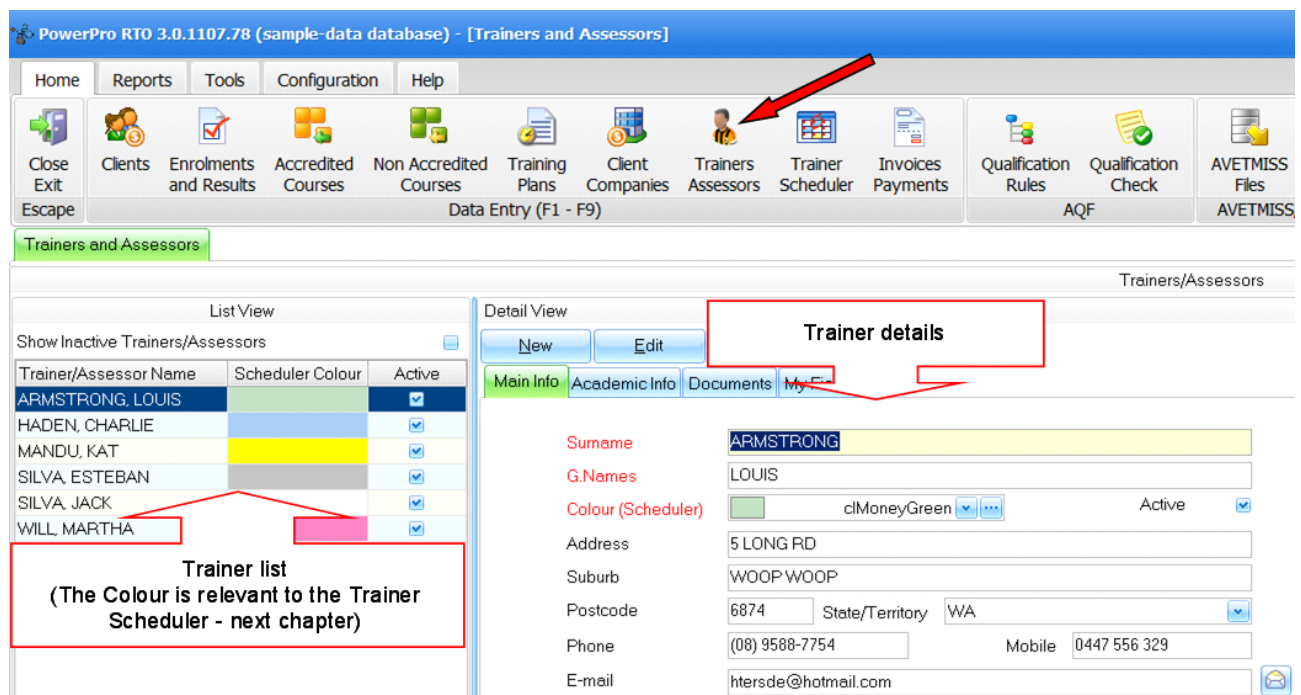


Figure above: The Trainers/Assessors window

8.1. Adding a new Trainer

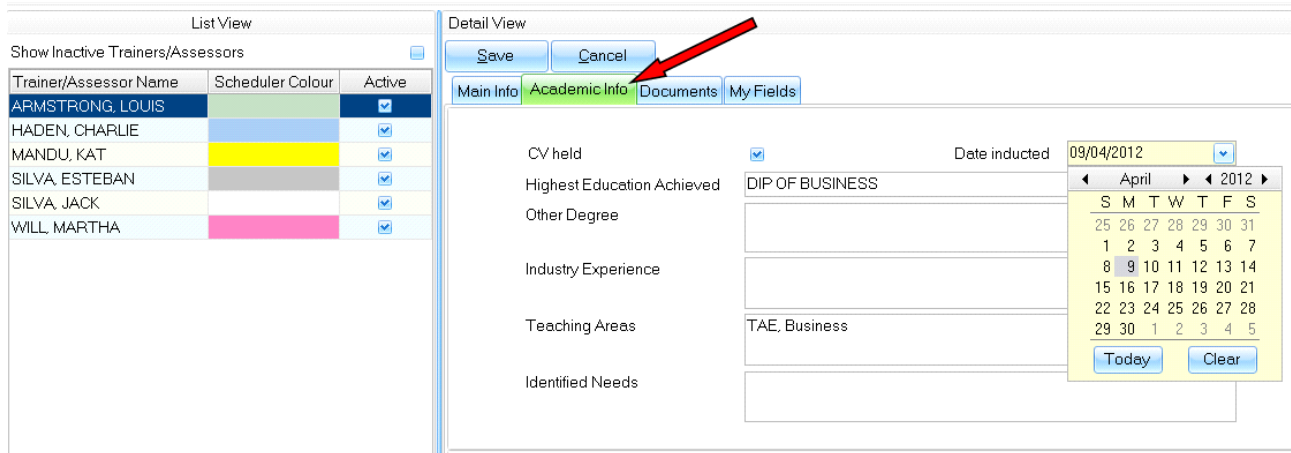
To add a new Trainer to the system click on the **New** button and fill in the required fields (labelled in red). The **Colour** field is used as a background colour for the new Trainer on the Trainer Scheduler (see relevant chapter in this manual). The **Active** field indicates the Trainer can be linked to current Courses. Once done click on the **Save** button (same as the New button but its caption has now changed to "Save").

8.2. Editing existing Trainer's details

To edit/modify a Trainer (e.g. update E-mail address) start by highlighting the trainer on the Trainer list. Then click on the **Edit** button and edit/modify the relevant fields. Once done click on the **Save** button (same as the New button but its caption has now changed to "Save").

8.3. Editing a Trainer’s Academic Information

To edit/modify a Trainer’s Academic Information (e.g. Induction date, Training Areas, etc) start by highlighting the trainer on the Trainer list. Then click on the **Edit** button and edit/modify the relevant fields on the **Academic Info** tab. Once done click on the **Save** button (same as the New button but its caption has now changed to “Save”):



■ Figure above: Editing a Trainer’s Academic Information

8.4. Editing a Trainer’s courses

The **Courses Completed** tab allows tracking courses/PDs completed/attended by the trainer:

Courses Achieved				
Course Code	Course Title	Achieved	Training Provider	Expires
TAA40104	Certificate IV in Training And Assessment	06 Sep 2010	Central TAFE (WA)	
BSB50207	Diploma of Business	07 Sep 2010	Durack Institute of Technology	
HLTFA201	First Aid	30 Nov 2011	Australia.Red Cross	30 Nov 2012
INDUC	Induction to Train Station	09 Apr 2012	Train Station	

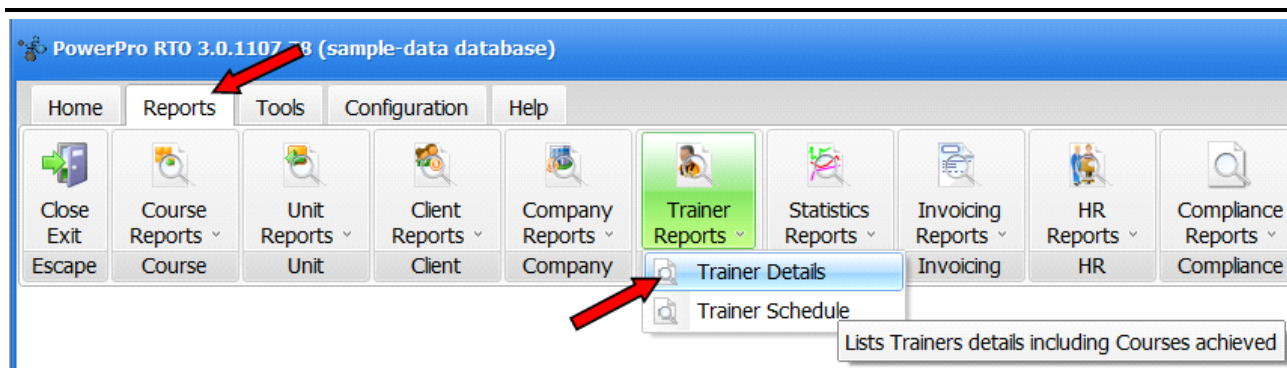
■ Figure above: Trainer Courses (part of the Academic Info tab)

Use the **Add Course** button to append a course to the trainer **Courses Achieved** list.

Use the **Edit Course** button to modify details of a course on the trainer **Courses Achieved** list.

Use the **Delete Course** button to remove a course from the trainer **Courses Achieved** list.

NOTE: Trainer Academic Information (including Courses Achieved) can be viewed on the **Trainer details report:**



8.5. Attaching documents to a Trainer record

Documents can be attached to a Trainer record using the **Documents** tab within the Trainers/Assessors window. Once attached these documents are saved in the database and can be viewed/extracted any time. These documents can be of any type (PDF, images, MS Word, etc) and there is no limit on the number of documents you can attach to a trainer. When attaching a document a short description can be entered along to help identifying the nature and contents of the document:

Trainer/Assessor Name	Scheduler Colour	Active
ARMSTRONG, LOUIS		<input checked="" type="checkbox"/>
HADEN, CHARLIE		<input checked="" type="checkbox"/>
MANDU, KAT		<input checked="" type="checkbox"/>
SILVA, ESTEBAN		<input checked="" type="checkbox"/>
SILVA, JACK		<input checked="" type="checkbox"/>
WILL, MARTHA		<input checked="" type="checkbox"/>

File Name	Document Description
TAA-Cert.pdf	TAA Certificate
Resume.pdf	Resume (Nov 2010)
Yearly Review.pdf	Yearly review 2010

■ Figure above: Trainer Documents (Documents tab)

Use the **Attach Docs** button to attach one or more documents to the trainer.

Use the **Edit details** button to adjust the description of a trainer documents.

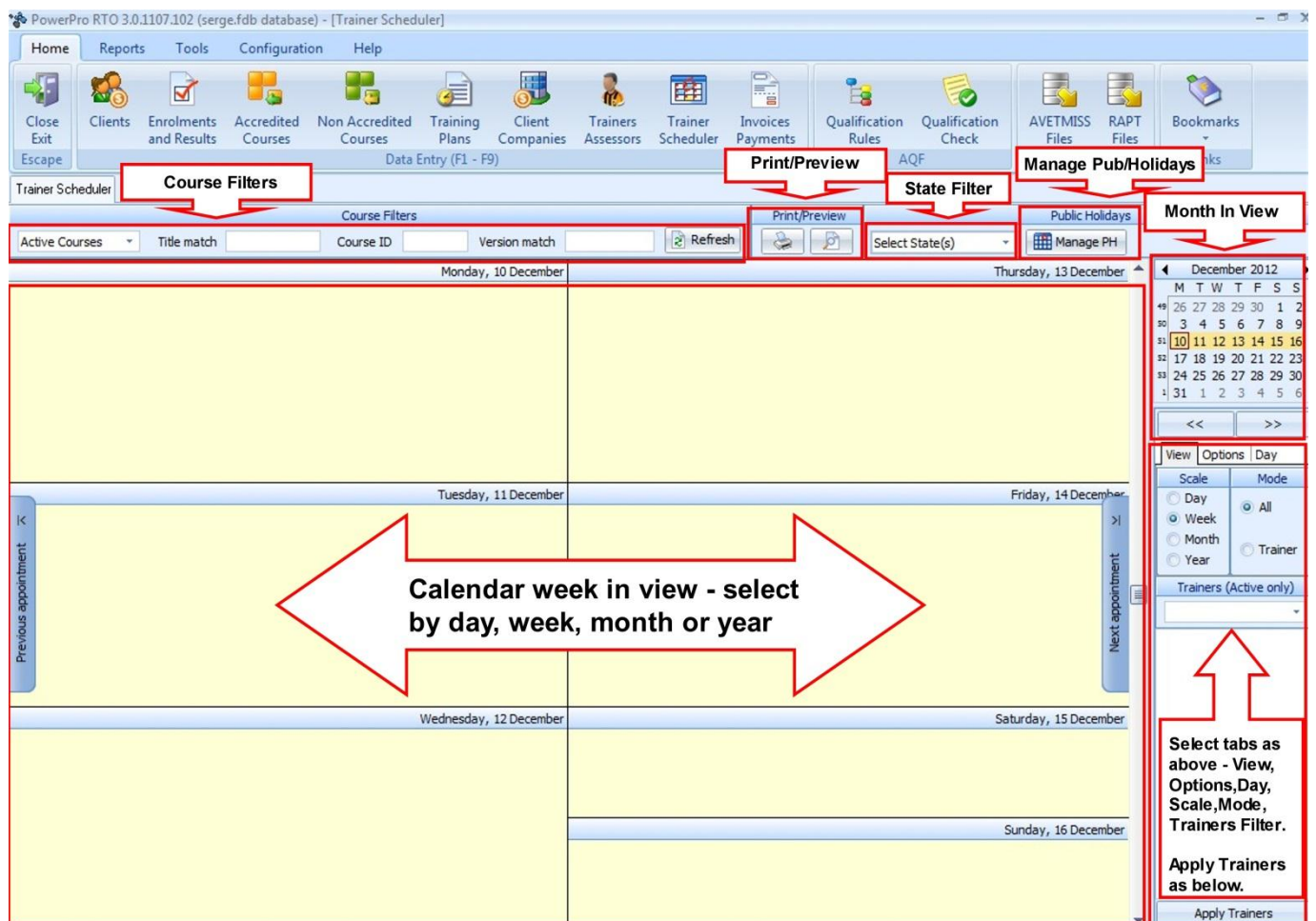
Use the **View Document** button to open the selected (highlighted) trainer document.

Use the **Delete Document** button to delete the selected (highlighted) trainer document.

9. Trainer Scheduler

The Trainer Scheduler is a calendar view for course sessions. These sessions can be accessed from the Trainer Scheduler as well as from the Course window. Having course sessions in the system will allow for:

- Viewing these sessions on a calendar format (using the Trainer Scheduler).
- Track **attendance** for students against each session.
- Print the **Trainer scheduled sessions** report including which units are delivered on each session.
- Print the **Course sessions** report for students.



■ Figure above: Trainer Scheduler

Key points on the Trainer Scheduler:

- Use Home>Trainer Scheduler to open the **Trainer Scheduler**.
- The Trainer Scheduler shows Course sessions not Courses (a course can have multiple sessions, these are the ones displayed in the calendar).
- Use course filters, to show only relevant course sessions.

- Use **View>Scale** to change the calendar view today, week, month or year.
- Use the **View>Mode** to toggle between view all and view by trainer modes.
- Use the **Trainers** State/Territory along the trainer list to with filter on the relevant trainers.

9.1. Viewing by trainer

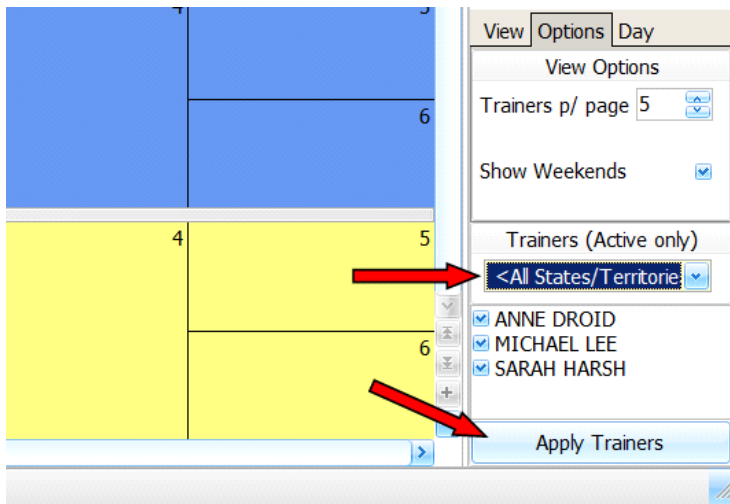
The calendar can also be displayed by trainer. This view shows one row per trainer using the trainer *Scheduler Colour* associated to each trainer (see *Trainers and Assessors* in this manual) as a background colour:

■ Figure above: Trainer Scheduler in Trainer mode

The **Optionstab** allows you to specify the maximum trainers displayed in a page as well as to show/hide weekends.

9.2. Filtering on trainers

Use the **Trainers** state/territory drop down to narrow the list of trainers displayed or set it to “All States/Territories” in order to list all trainers:

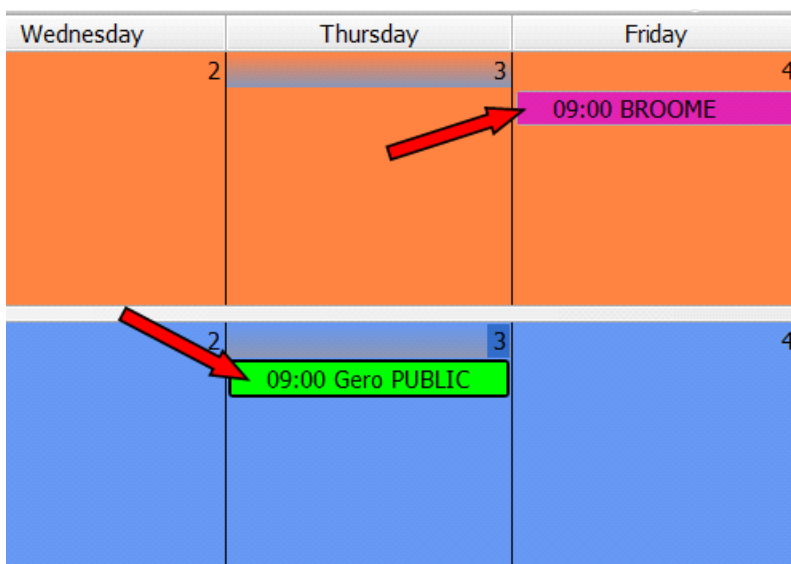


■ Figure above: Filter trainers

Once the State/Territory filter is set, the list of trainers underneath is refreshed. You can now adjust which trainers to display by checking/un-checking them on this list. Press **Apply Trainers** to update the calendar view reflecting your trainer selection.

9.3. Editing a Session

Sessions are shown as coloured cells in the calendar. The cell colour indicates the course type associated with the session and they may have a caption:



■ Figure above: Course sessions on the Calendar

Sessions can be dragged from one day to another or from one trainer to another. These operations will update the session details in the database.

NOTE: The system will not allow dragging a session to a date outside the start/end dates of the course.

To view/edit all details of an existing session, double-click on the session its cell (or right-click and choose **Edit Session**) to open the Session window:

The screenshot shows a software window titled "MICHAEL LEE - 03/01/2013". The window contains several input fields and buttons. The "Trainer" field is set to "MICHAEL LEE". The "Course" field is set to "C000006 Course - RSA Course" and has an "Edit Course" button next to it. The "Units (6 Max)" section contains a table with one row: "SITHFAB009A" under "Unit/Mod. Code" and "Provide responsible service of alcohol" under "Unit/Module Name". The "Location" field is set to "Geraldton" and has a "New Location" button. The "Caption" field is set to "Gero PUBLIC". The "Colour/Course type" field is set to "RSA" with a green square icon. The "Course Dates" field shows "03/01/2013" for both start and end dates. The "Session Date" field is set to "03/01/2013". The "Start/End Time" field shows "09:00 AM" and "12:00 PM". There is a "Notes/Message to Trainer" text area at the bottom. At the very bottom of the window are three buttons: "Attendance", "OK", and "Cancel".

■ Figure above: Session window

Most details above are self-explanatory. The **Colour/Course type** and **caption** fields will determine the colour and text of the session cell in the calendar.

9.4. Creating a Session from the calendar

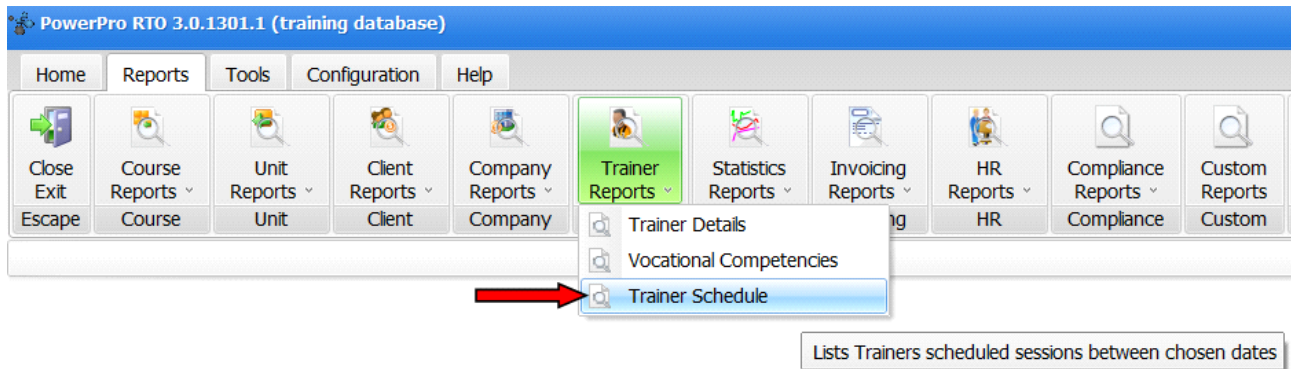
Sessions can be created from within the calendar window as well as from the Course window. To create a session from the calendar, do as follows:

1. Double click (or right-click->**New Session**) on the relevant cell (day) in the calendar.
2. The Session window will be displayed. It should default to the trainer (row) you have clicked on. Adjust the **Trainer** field if required.
3. Choose the **Course** (the list should only show active courses for that day).
4. Optionally select up to 6 **units** for the new session.
5. The **Location** defaults to the Course delivery location, however, since this session can take place on a different location this field can be adjusted.
6. Optionally adjust the **Caption** field.

7. Set the **Colour/Course type** to match the course type the session relates to.

9.5. Printing the Trainer scheduled sessions report

The Trainer scheduled sessions report lists all sessions assigned to a trainer between dates. Details include the course name, group/version, location, date and time of the session and units to be covered on the session. To run this report use **Reports>Trainer Reports>Trainer Schedule**:



■ Figure above: Running the Trainer scheduled sessions report

9.6. Printing the Course sessions report

The Course sessions report lists all sessions for a specific course. This report can be handy for students so they are aware of the exact dates and times of their classes as well as the location and contents covered on each session. The report includes details such as the course name, group/version, location, date and time of the session and units to be covered on the session. To run this report, do as follows:

1. Open the **Enrolments and results** window.
2. Right-click on the relevant Course and choose **Print Course Sessions**.

PowerPro RTO 3.0.1301.1 (training database) - [Enrolments and Results]

Home Reports Tools Configuration Help

Close Exit Clients Enrolments and Results Accredited Courses Non Accredited Courses Training Plans Client Companies Trainers Assessors Trainer Scheduler Inv Pay

Escape Data Entry (F1 - F9)

Enrolments and Results

Active ID/Nat Code/Title Group/Version Surname, Given Names State/Territory
 Archived

Course ID	National Code	Qualification Level	Course Title
C000006		Course	RSA Course
C000004		Course	RSA Course
C000003	WRB20104	Certificate II	Nail Technology
C000001	WRB20104	Certificate II	Nail Technology

New Enrolment Edit Enrolment Modify Units Client Details Bulk

Statu	Client Name	Company/Organisation	Withdrawal	Com
✓	BANJO, SANDRA	<UNSPECIFIED>		
✓	BEE, SARAH	<UNSPECIFIED>		
✓	COSTA, MANUEL	<UNSPECIFIED>		
✓	DORES, MARIA	BIG COMPANY		
✓	KALPINSKY, JANINE	<UNSPECIFIED>		

Edit Course details
Print Course Sessions
 Print Roll...
 Attendance by Session...
 Attendance Summary...
 Course/Qual Alignment...
 Qualification Check...
 Print Unit Based SOA...
 Print Unit based ROA...
 Print Cert. of Attendance...

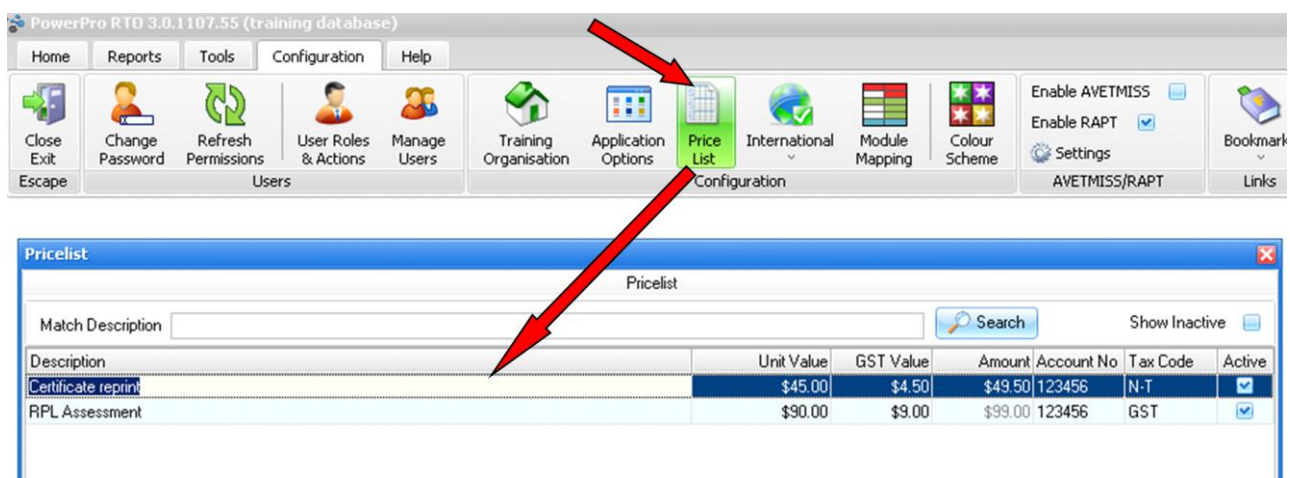
■ Figure above: Running the Course sessions report

10. Invoices and Payments

PowerPro RTO has an Invoicing subsystem where Invoices can be created against students (Client Invoice) or Companies (Company Invoice). To assist with data entry, there are two areas of pre-defined invoicing items: a generic **Pricelist** available to any Invoice and a **Course fee structure** specific for each type of Course. When a course is cloned, its **Course fee structure** is cloned with it.

10.1. Pricelist

The generic Pricelist is found in **Configuration>Price List** as per image below:

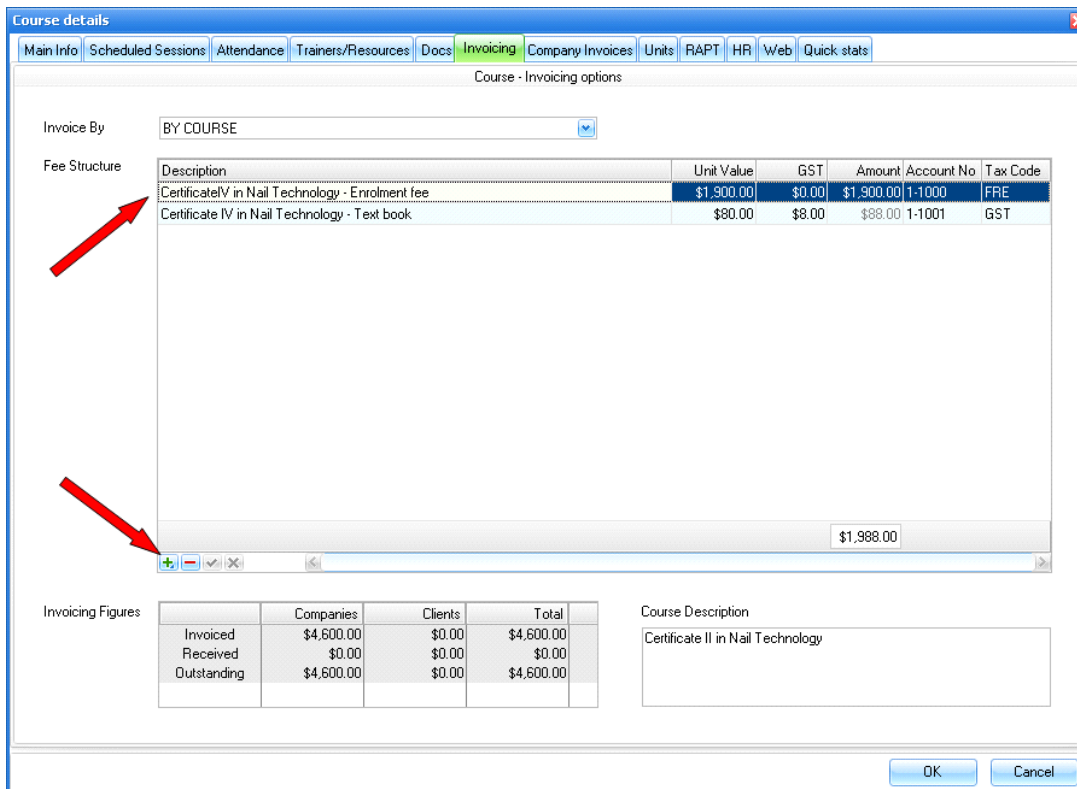


■ Figure above - Pricelist

The **Account No** and **Tax Code** fields are relevant if you plan to export account transactions from PowerPro RTO to MyOB (PowerPro exports to MyOB format). These are the target account number (MyOB account number) and the tax code associated with each item.

10.2. Course fee structure

The **Course fee structure** is attached to each course. To access it double click on the Course (from the **Enrolments and Results, Accredited courses** or **Non-accredited courses** windows) and select the **Invoicing** tab:



■ Figure above: Example of a Course fee structure

Note: When cloning a course the **Course fee structure** (above) is copied across to the new course.

10.3. Creating a Client Invoice

To create a Client Invoice the Client (Student) must be already enrolled in the Course. The invoice is created from the **Enrolments and Results** window. The steps are as follows:

1. Find/highlight the relevant course on the course list
2. Find/highlight the student within the course
3. Open the **Invoices** tab
4. Click on Invoice>New Invoice>Client Invoice (as per image below)

Enrolments and Results

Active ID/Nat Code/Title Group/Version Surname, Given Names State/Territory Course Date
 Archived <All Clients> <All States>

Course ID	National Code	Qualification Level	Course Title
C000001	wRB20104	Certificate IV	Nail Technology

Status	Client Name	Company/Organisation	Withdrawal	Completed
✓	COSTEX, LIZ	<UNSPECIFIED>		
✓	CRAWLER, DIANA	<UNSPECIFIED>		
✓	DIND, SHARON	<UNSPECIFIED>		
✓	DORES, MARIA	<UNSPECIFIED>		
✓	HILL SARAH	RIG COMPANY		

- New Invoice
 - Client Invoice
 - Company Invoice
- Edit Invoice
- Void Invoice
- Delete Invoice

■ Figure above - Creating a Client Invoice in PowerPro RTO

5. The Client Invoice window pops up:

■ Figure above – New Client Invoice

The **Invoice No** (Invoice Number) shown as blank above only gets allocated once the invoice is saved.

The **Invoice date** defaults to today’s date but this field can be overwritten. The **due date** field defaults to today’s date plus the number of days set in Configuration>Application Options>Invoicing>Due Date after.

The **Template** field determines the layout of the invoice. This is a list of all templates (word documents) existing in the relevant template folder.

The system picks up the Clients main address details. You can use the **Copy Address Details from** button to lookup the Postal address or the Company address of the company associated with the student.

The **internal notes** field is not printed on the invoice. These are for internal/staff use only.

10.3.1. Adding lines to a Client Invoice

Use the **Add Line(s)** dropdown button To add lines/items to an Invoice:

Client Invoice

Invoice Header

Invoice No: 1215 Purch. C

Course ID: C000001 Invoice

Invoice Date: 27 Aug 2012 Address

Date Sent: Town/S

Due Date: 17 Sep 2012 Postco

Template: Invoice Template.doc

Invoice Lines

Add Line(s) ... Edit Line Delete Line(s)

Course Fee Structure...

Use Pricelist...

Manual Line...

■ Figure above – Adding lines/items to a Client Invoice

Use the **Course Fee Structure** option to automatically import the fee structure defined for this Course.

Use the **Use Pricelist** option to import one or more lines/items from the Pricelist.

Use the **Manual Line** option to manually add a line to the invoice.

10.4. Creating a Company Invoice

To create a Company Invoice, at least one Client (Student) from that company must be enrolled in the Course. The invoice is created from the **Enrolments and Results** window. The steps are as follows:

1. Find/highlight the course on the course list
2. Find/highlight a student belonging to the relevant company within the course
3. Open the **Invoices** tab
4. Click on Invoice>New Invoice>Company Invoice (as per image below)

Enrolments and Results

Active ID/Nat Code/Title Group/Version Surname, Given Names State/Territory Course Date
 Archived <All Clients> <All States>

Course ID	National Code	Qualification Level	Course Title
C000001	wRB20104	Certificate IV	Nail Technology

Status	Client Name	Company/Organisation	Withdrawal	Completed
✓	COSTEX, LIZ	<UNSPECIFIED>		
✓	CRAWLER, DIANA	<UNSPECIFIED>		
✓	DIND, SHARON	<UNSPECIFIED>		
✓	DORES, MARIA	<UNSPECIFIED>		
✓	HILL SARAH	RIG COMPANY		

- New Invoice
 - Client Invoice
 - Company Invoice
- Edit Invoice
- Void Invoice
- Delete Invoice

■ Figure above - Creating a Client Invoice in PowerPro RTO

5. The Client Invoice window pops up:

■ Figure above – New Client Invoice

The **Invoice No** (Invoice Number) shown as blank above only gets allocated once the invoice is saved.

The **Invoice date** defaults to today's date but this field can be overwritten. The **due date** field defaults to today's date plus the number of days set in Configuration>Application Options>Invoicing>Due Date after.

The **Template** field determines the layout of the invoice. This is a list of all templates (word documents) existing in the relevant template folder.

The system picks up the Clients main address details. You can use the **Copy Address Details from** button to lookup the Postal address or the Company address of the company associated with the student.

The **internal notes** field is not printed on the invoice. These are for internal/staff use only.

NOTE: Invoices are always created from the Enrolments window.

11. Enquiries

PowerPro can assist in tracking enquiries from prospective students. The **Enquiries** window can be opened from the **Tools** tab:

The screenshot shows the PowerPro interface with the 'Tools' tab selected. The 'Enquiries' button is highlighted with a red arrow. Below the toolbar is a table of enquiries and a detailed view for a specific enquiry.

Enquired on	Days ago	Surname	Given Names	Company/Organisati	Course Type	Status	Follow Up	Admin user	Admin notes
11 Jan 2013	2	FRENZY	GRAHAM		TAE40110	Open	14 Jan 2013	RTOADM	Called Graham on Friday but could not reach him. Tryin
17 Dec 2012	27	COSTA	FELISBERTA		TAE40110	Open	10 Mar 2013	RTOADM	Emailed back RPL info, will touch base when we have a d

Enquirylist

Enquiry details

New **Edit**

Surname: COSTA
Given Names: FELISBERTA
Company:
Email: FB@HOTMAIL.COM
Day Phone:
Course: TAE40110
Message: Hi, I would love to do that course with Train Station. Are you running it in Perth any time after March 2013? Can I get some of my TAA units RPL'd? Thanks, Graham.
Admin Notes: Emailed back RPL info, will touch base when we have a date for the April course.

Enquired on: 17/12/2012
Enquiry channel: Via Web/Online
Status: Open
Follow Up: 10/03/2013

Contact preference: Email

Admin user: RTOADM Modified on: 13 Jan 2013 18:53

■ Figure above – Enquiries windows

Enquiries can be entered manually into the system or imported from an online enquiry email (the latest requires PowerPro RTO Web Plugin).

11.1. Entering an enquiry manually

To enter a new enquiry into the system, follow these steps:

1. On the Enquiries window, click on the **New** button (this button reads “Save” now).
2. Fill in the relevant fields.
3. Click on **Save** to save the new enquiry.

11.2. Importing an online enquiry

Online enquiries are created by prospective students using the Enquiries function of the web plugin:

■ Figure above – Creating an online enquiry using the web plugin

Prospective students fill in the above form (which can be embedded on your RTO’s web site). Once submitted, a standard email is sent to the RTO admin staff containing an attachment file with all the information:

Online enquire Inbox x

Vidatek <vidatekhelp@gmail.com>
to me

New Online Enquiry (Jasmin Robbs)

Please import the attached XML file into PowerPro RTO using the Tools>Web>Import Web enquiries menu.

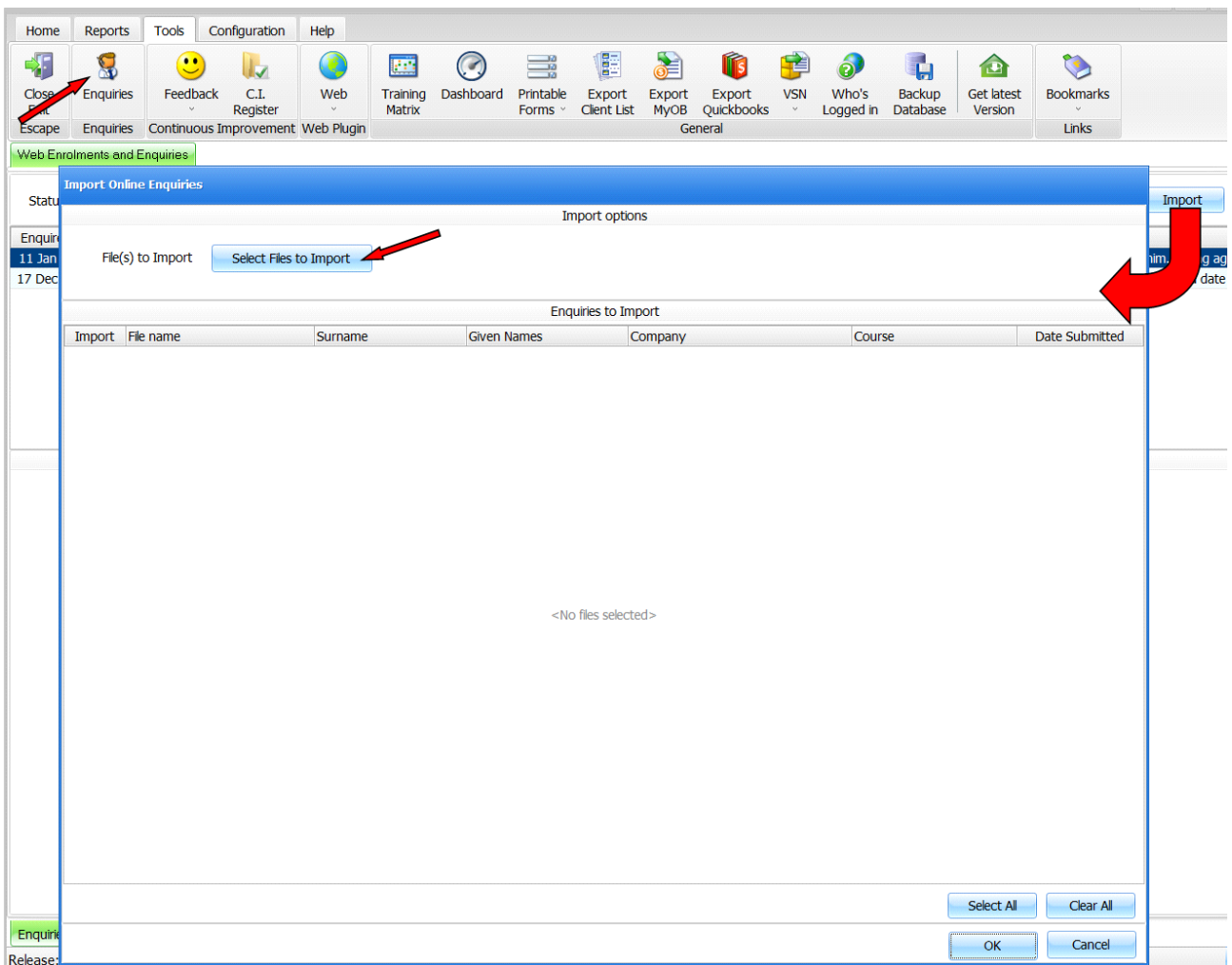
You can manage these enquiries in PowerPro using Tools>Enquiries.



vid_ENQ_20130114_115653_Jasmin.xml
1K [Download](#)

■ Figure above –Online enquiry email

Once the attachment is saved, the file can be imported into PowerPro RTO:



■ Figure above – Importing online enquiries

The above sequence is:

1. Open the **Tools>Enquiries** window.
2. Click on the **Import** button.
3. On the new window, click on **Select Files to Import**.
4. Select one or more enquiry files to import (not shown above).
5. Press **OK** to finalise the import.

Now the new enquiry should be visible in the Enquiries list:

Web Enrolments and Enquiries

Status: Last: days Name match:

Enquired on	Days ago	Surname	Given Names	Company/Organisation	Course Type	Status	Follow Up	Admin user	Admin notes
14 Jan 2013	0	ROBBS	JASMIN	LED	SQL	Open	14 Jan 2013	RTOADM	
11 Jan 2013	3	FRENZY	GRAHAM		TAE40110	Open	14 Jan 2013	RTOADM	Called Graham on Friday but could not reach him. Trying ag
17 Dec 2012	28	COSTA	FELISBERTA		TAE40110	Open	10 Mar 2013	RTOADM	Emailed back RPL info, will touch base when we have a date

Enquiry details

Surname: Enquired on:

Given Names: Enquiry channel:

Company: Status:

Email: Follow Up:

Day Phone: Contact preference:

Course:

Message:

Admin Notes:

Admin user: Modified on:

■ Figure above – Online enquiry imported

11.3. Tracking enquiries

Once an enquiry is in the system, it can be tracked using the following fields:

Field	Values/Content	Notes
Status	Open/Archived	Defaults to open. Set to <i>archived</i> when the student is enrolled or the enquiry is not to be followed up.
Follow Up	Date for follow up call/email	Set a follow up date for the enquiry.
Admin Notes	Text/memo entered by staff	Use to record the outcome of the last contact/follow up on this enquiry.

Web Enrolments and Enquiries

Status: Last: days Name match:

Enquired on	Days ago	Surname	Given Names	Company/Organisation	Course Type	Status	Follow Up	Admin user	Admin notes
14 Jan 2013	0	ROBBS	JASMIN	LED	SQL	Open		RTOADM	
11 Jan 2013	3	FRENZY	GRAHAM		TAE40110	Open	14 Jan 2013	RTOADM	Called Graham on Friday but could not reach him. Trying ag
17 Dec 2012	28	COSTA	FELISBERTA		TAE40110	Open	10 Mar 2013	RTOADM	Emailed back RPL info, will touch base when we have a date

Enquiry details

Surname: Enquired on:
 Given Names: Enquiry channel:
 Company: Status:
 Email: Follow Up:
 Day Phone: Contact preference:
 Course:
 Message:
 Admin Notes:

Admin user: Modified on:

■ Figure above – Fields used for tracking enquiries

12. AVETMISS reporting

AVETMISS reporting is a key requirement for RTOs. It consists of a set of text files (called NAT files: NAT00020, NAT00030, etc.) containing very detailed information on the training activity of the RTO for a specific calendar year. It includes information about student demographics, units and courses delivered, start/end dates, outcomes (e.g. “Competent”, “RPL”, etc.), course completions, delivery locations, funding source codes and contract numbers and more. AVETMISS fields exist in different areas/screens of the system as they might relate to the RTO, to the delivery location, to the unit of competence, to the course, to the client, to the enrolment or to the unit outcome.

Although AVETMISS is a national standard, there are slight differences on how each state/territory implements it. Each state/Territory has its own web portal to be used by RTOs when uploading their AVETMISS files. Most of these portals expect the NAT files to be uploaded as a zip file (which PowerPro can do for you).

The following table lists the NAT files as well as their contents:

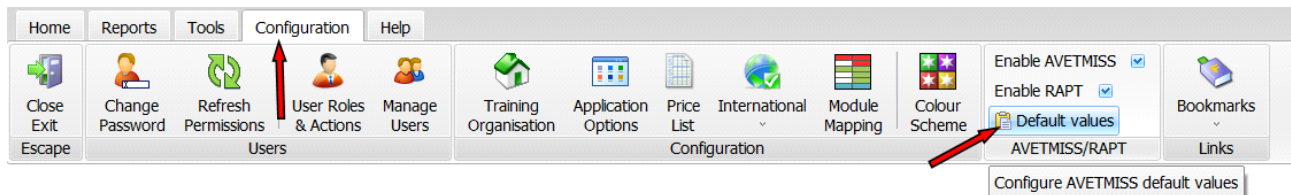
File name	Contents	Notes
NAT00010	Training Organisation details	Contains only one row normally.
NAT00020	Deliver locations details	Contains one row per different location reported.
NAT00030	Course details	Contains as many rows as the different courses (national codes) reported (Name, Nat. code, field of education, etc.)
NAT00060	Unit details	Contains one row for each unit reported (code, name, nominal hours, etc.)
NAT00080	Client details	Contains one row for each student being reported.
NAT00085	Client postal details	Contains one row for each student being reported.
NAT00090	Disability	Contains one row for each student flagged with a disability.
NAT00100	Prior educational achievement	Contains one row for each student flagged with a prior qualification.
NAT00120	Enrolment	Most important file, each row contains information on a client/unit combination (student ID, Unit ID, start/end dates, outcome, delivery mode, etc.)
NAT00130	Qualification completed	Contains one row for each student that has completed a Qualification or accredited course. It also lists whether the Qualification (certificate) has been issued.

NOTE: To fully understand the AVETMISS rules and specifications we suggest reading the current AVETMISS documentation found in <http://www.ncver.edu.au>.

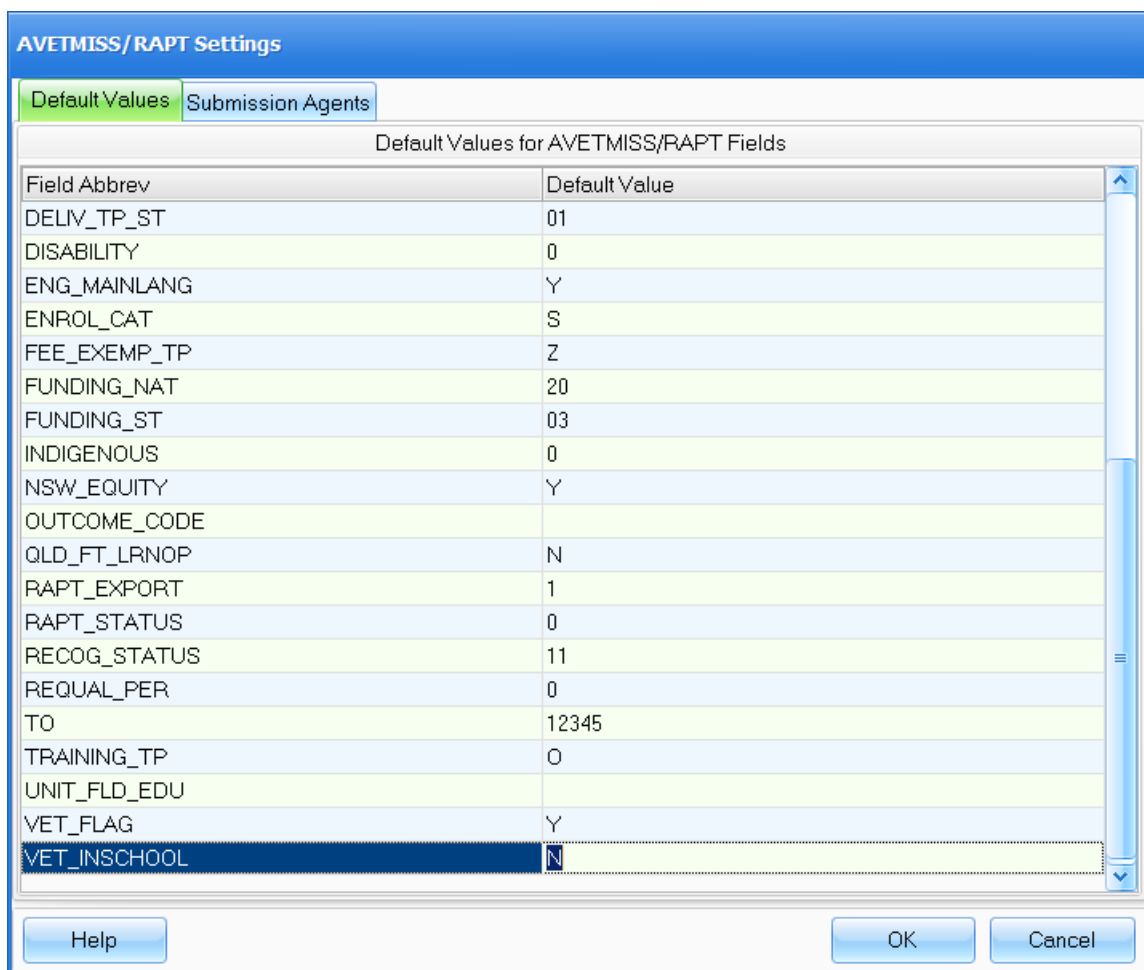
12.1. Default values

Default values are used for new records and mostly apply to enrolments. For example, if your RTO does mainly “VET in school” programs it makes sense to set the default value for this field to be Y instead of N. It means when enrolling a student in a course the system will pre-set the “VET in School” enrolment field with a Y. It is important that you know the possible values for each field when setting these defaults – please check the latest AVETMISS specification for this matter.

The Default Values window is launched using **Configuration>Default Values**:



■ Figure above – How to open the AVETMISS default values window



■ Figure above – The AVETMISS default values window

12.2. Training organisation AVETMISS details

Make sure your RTO details match those recorded in <http://training.gov.au>. To configure/adjust your RTO details use the Configuration>Training Organisation screen:

The screenshot displays the 'Training Organisations' configuration interface. On the left, a 'List View' table shows a single entry for 'Train Station' which is active. The main area contains a form for editing details. The 'Main info' tab is selected, showing the following fields:

Provider No	52504
Name	Train Station
Address	6 River Rd
Suburb	Geraldton
Postcode	6530
State/Territory	WA
T. Org. type	EDUCATION/TRAINING BUSINESS OR CENTRE: PRIVATELY OPERATED RTO
Public/Private	PRIVATE
Phone	(08) 9965-5588
Fax	(08) 9965-6655
E-mail	admin@trainstation.com.au
Contact	Jaqueline Thomson
Notes	

■ Figure above – Training Organisation fields

All fields except for **Notes** in the above image are relevant to AVETMISS reporting. In fact this is what is reported in the NAT00010 file.

12.3. Delivery Location AVETMISS details

Each course takes place in a main location (except if it is online in which case the delivery location can be set to the administrative address of the RTO). These locations are recorded against the Training Organisation in PowerPro RTO (each Training Organisation can have multiple delivery locations):

The screenshot shows the 'Training Organisations' detail view for 'Train Station'. The interface includes a menu bar (Home, Reports, Tools, Configuration, Help) and a toolbar with various icons. The main content area is split into a list view on the left and a detail view on the right. The detail view shows fields for Provider No, Name, Address, Suburb, Postcode, State/Territory, T. Org. type, Public/Private, Phone, Fax, E-mail, Contact, and Notes. Below the detail view is a section for 'Delivery Locations for Courses delivered by this Training Organisation' with buttons for 'New Location', 'Edit Location', and 'Delete Location'. A table below these buttons lists delivery locations with columns for Location Name, Location Address, and Avetmiss Code.

Location Name	Location Address	Avetmiss Code
Broome Campus - Beauty Therapy	12 Frederick st. Broome	000002
Head Office - Geraldton	6 River Rd. Geraldton	Gero1
Perth	123 Adelaide St. Perth	000003

■ Figure above – Delivery Locations

When generating the AVETMISS files, the system uses the delivery location details to populate the NAT00020 file. If your AVETMISS lodgement returns an inconsistency error between the delivery location postcode and its locality/suburb, you must edit the relevant delivery location and update those details.

To edit a delivery location, select/highlight it first and click on **Edit Location**. A new window pops up allowing you to modify the location details:

Delivery Location

Delivery Location details

Training Organisation	<input type="text" value="Train Station"/>		
Delivery Location name	<input type="text" value="Head Office - Geraldton"/>		
Address	<input type="text" value="6 River Rd"/>		
Suburb	<input type="text" value="Geraldton"/>		
Postcode	<input type="text" value="6530"/>	State/Territory	<input type="text" value="WA"/>
Country	<input type="text" value="Australia"/>		
AVETMISS code	<input type="text" value="Gero1"/>		
Contact Person	<input type="text" value="Mary Anne"/>		
Phone	<input type="text" value="(08) 9964 5521"/>	Mobile	<input type="text" value="0447 80 6 3"/>
		Fax No	<input type="text" value="()"/>
Email address	<input type="text" value="manne@trainstation.com.au"/>		

Use Company Address

OK

Cancel

■ Figure above – Delivery Location details

NOTE: The **AVETMISS code** field has to be unique within your locations. You can leave it empty and the system will allocate a sequential number for it.

12.4. Unit AVETMISS details

Each unit has its own fields/attributes such as code, name, nominal hours, field of education, etc. These fields are reported in the NAT00030 file. If you need to adjust any details of a unit these please do as follows:

1. Open the **Accredited Courses** window (Home>Accredited Courses).
2. Locate the unit on the **Available Units** list (bottom left).
3. Double click on the unit row to edit the unit details.
4. Adjust the required details and click **OK** to save.

Accredited Courses

Filter Course Status: Active Courses | ID/Nat Code/Title: | Group/Version: | State/Territory: <All States> | Course Date:

Course ID	National Code	Qualification Level	Course Title	Group/Version
C000006			RSA Course	RSA GERALDTON GROUP 6 201
C000003	WRB20104	Certificate II	Nail Technology	BROOME 2012
C000004		Course	RSA Course	RSA GERALDTON GROUP 6 201
C000001	WRB20104	Certificate II	Nail Technology	BROOME 2012

Unit information

Main Information

Unit National Code: WRBCS201B | Unit Colour: Aquamarine

Unit Name: Conduct financial transactions

Nominal Hours: 30

Requal Period: 0 Months

Active:

AVETMISS Information

Field of Education: 080501

VET Flag:

Delivery Mode (Nat): CLASSROOM-BASED

State/Territory Specific

Unit Code (State): WRBCS201B

Delivery Mode (State): LOCAL FACE TO FACE CLASS

OK | Cancel

■ Figure above – Unit of competence details

12.5. Course AVETMISS details

Each PowerPro course has a set of AVETMISS attributes. When cloning a course, these attributes are preserved. Courses with the same national code should have the exact same AVETMISS attributes.

Course details

Main Info | Scheduled Sessions | Attendance | Trainers/Resources | Docs | Invoicing | Company Invoices | Units | AVETMISS | RAPT | HR | Web

Course - AVETMISS fields

Qualification Code: WRB20104 Report this Course:

ANZSCO Identifier: 451111 Nominal Hours: 280

Recognition status: NATIONALLY ACCREDITED QUAL. DESIGNED TO LEAD TO A QUAL. SPECIFIED IN A NATIONAL TP

Qualification category: CERTIFICATE II

Qual. Field of Education: Personal Services

Purchasing Contract ID: Purchasing Contract Schedule:

File Format: WA VET Flag:

Specific Program Identifier:

ACT | NSW | NT | QLD | SA | TAS | VIC | WA | National

Roll ID:

OK Cancel

■ Figure above – Course AVETMISS details

Key points:

- The ANZSCO identifier can be found in <http://training.gov.au> under “classifications” at the end of the Qualification details.
- The **Purchasing Contract ID** and **Purchasing Contract Schedule** are used when receiving public funding in all states/territories except for NSW and WA.
- The File Format determines the layout to be used when generating the AVETMISS data for this course.
- The **Specific Program Identifier** has been added with AVETMISS 6.1, most times is left empty.

12.6. Client AVETMISS details

As part of the enrolment form/process, RTOs must ensure the client AVETMISS information is captured. This is mostly relevant in accredited training. Client AVETMISS details are recorded in the AVETMISS tab on the Clients window:

Clients

Code	Match Name Pattern	Secondary ID	Company/Organisation
	COSTA		<UNSPECIFIED>

Apply filter

Code	Surname	Given Names	Preferred Name	Second
00000025	COSTA	MANUEL	MANUEL	

Gender	MALE	Unique Student Id (USI)	
Country of birth	Australia		
Language other than English at home	Spanish		
Proficiency in English	WELL		
Indigenous status	NO, NEITHER ABORIGINAL NOR TORRES STRAIT ISLANDER		
Disability	NO DISABILITY		
Highest school level completed	COMPLETED YEAR 11 OR EQUIVALENT		
Year higher school level completed	2005	Currently at school	<input type="checkbox"/>
Prior qualifications	CERTIFICATE IV		
Prior Education achievement flag	YES		
Employment category/status	PART-TIME EMPLOYEE		
Study reason	TO START MY OWN BUSINESS		

■ Figure above – Client AVETMISS fields

When generating the AVETMISS files, the system uses the client details to populate the NAT00080 (client details), NAT00085 (client postal address), NAT00090 (client disability) and NAT00100 (prior educational achievement) files.

13. Victorian Student Number

PowerPro RTO implements VSN (Victorian Student Number) as a field linked to the Client (**AVETMISS** tab):

The screenshot shows the 'Clients' window in PowerPro RTO. At the top, there is a 'Client List' table with columns: Code, Match Name Pattern, Secondary ID, Company/Organisation, Division, Department, and Location. Below the table are buttons for 'Save', 'Cancel', and 'Delete client...'. The 'AVETMISS/RAPT' tab is selected, showing a form with various fields. A red arrow points to the 'Vic Student No' field in the 'VIC Specific Fields' section, which contains the value '145887'.

Code	Match Name Pattern	Secondary ID	Company/Organisation	Division	Department	Location
00000721	ANDREWS	BARRY	<UNSPECIFIED>			

Buttons: Save, Cancel, Delete client...

Tabs: Main info, Postal Address, **AVETMISS/RAPT**, Courses, Outcomes achieved, AQTF Docs printed, Invoices, Contact Log, Documents, International

Fields:

- Gender: MALE
- Country of birth: Australia
- Language other than English at home: [dropdown]
- Proficiency in English: [dropdown]
- Indigenous status: [dropdown]
- Disability: NO DISABILITY
- Highest school level completed: [dropdown]
- Year higher school level completed: [dropdown]
- Prior qualifications: [dropdown]
- Prior Education achievement flag: NO
- Employment category/status: [dropdown]
- Study reason: [dropdown]
- Centrelink Number (CRN): [text box]
- Job Seeker Number: [text box]

WA Specific Fields:

- Education Identifier: [text box]
- English is main Lang. [checked]
- Region: [dropdown]

QLD Specific Fields:

- Learner Unique ID: [text box]

VIC Specific Fields:

- Vic Student No: 145887

■ Figure above - client VSN number in PowerPro

Use this field to record/maintain the client VSN.

You need to maintain VSN information if your training organisation is registered with VRQA.

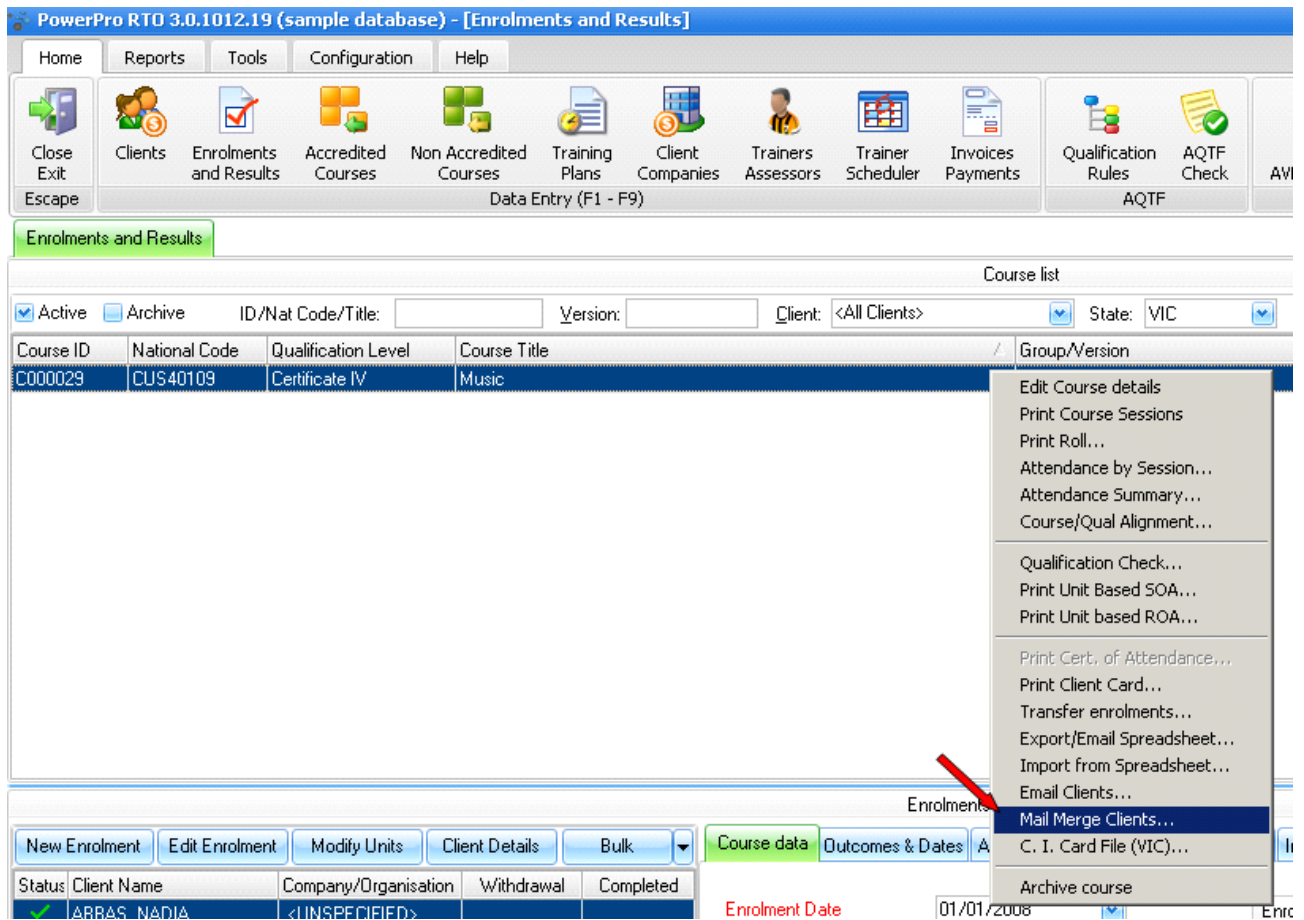
Students in scope are:

- Students under 17 years old undergoing any kind of training (accredited or not) delivered in Victoria
- Students under 25 years old undergoing accredited training or Non-accredited funded training delivered in Victoria

13.1.1. Notifying clients about their VSN

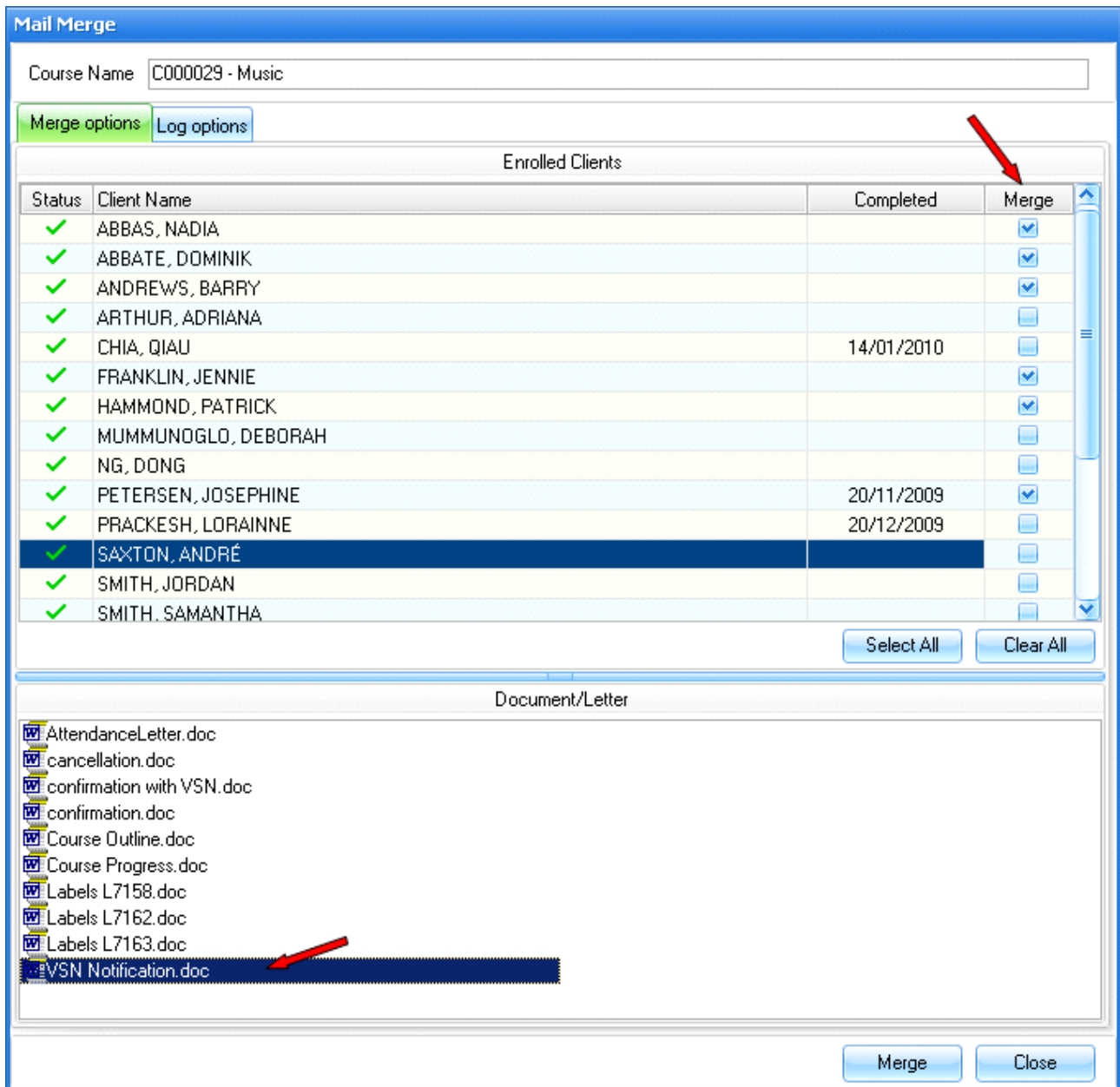
The 'Mail Merge Clients' facility in PowerPro is very convenient for this - you can have your own letter layout (in MS Word) to communicate/inform your clients about their VSNs.

From the **Enrolments and Results** window, right-click on the relevant course and select **Mail Merge clients**:



■ Figure above - the Mail Merge Clients function in PowerPro

Then select which clients to include in the Merge as well as which document to use:



■ Figure above - selecting Clients to be merged and the document to use

MS Word should come up with the merged document (one page per student) as follows:

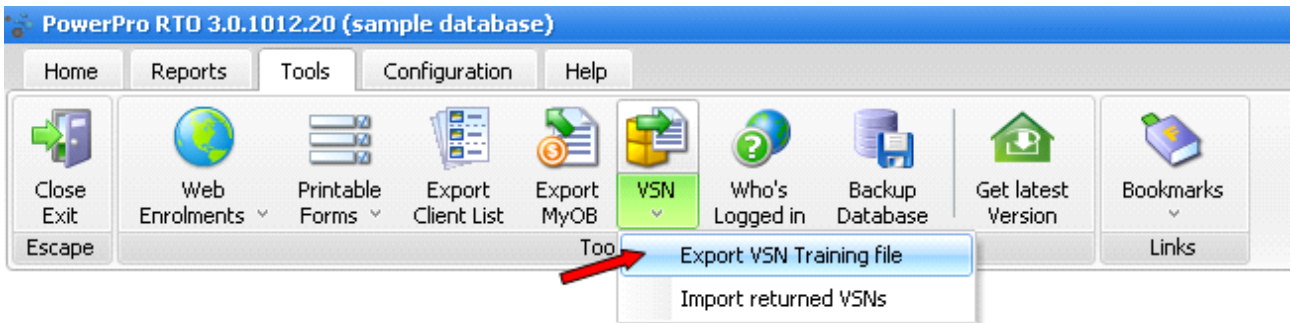


■ Figure above - Completed Mail Merge example

NOTE: You can setup your letter templates to have the postal address fields matching the area of your windowed envelopes.

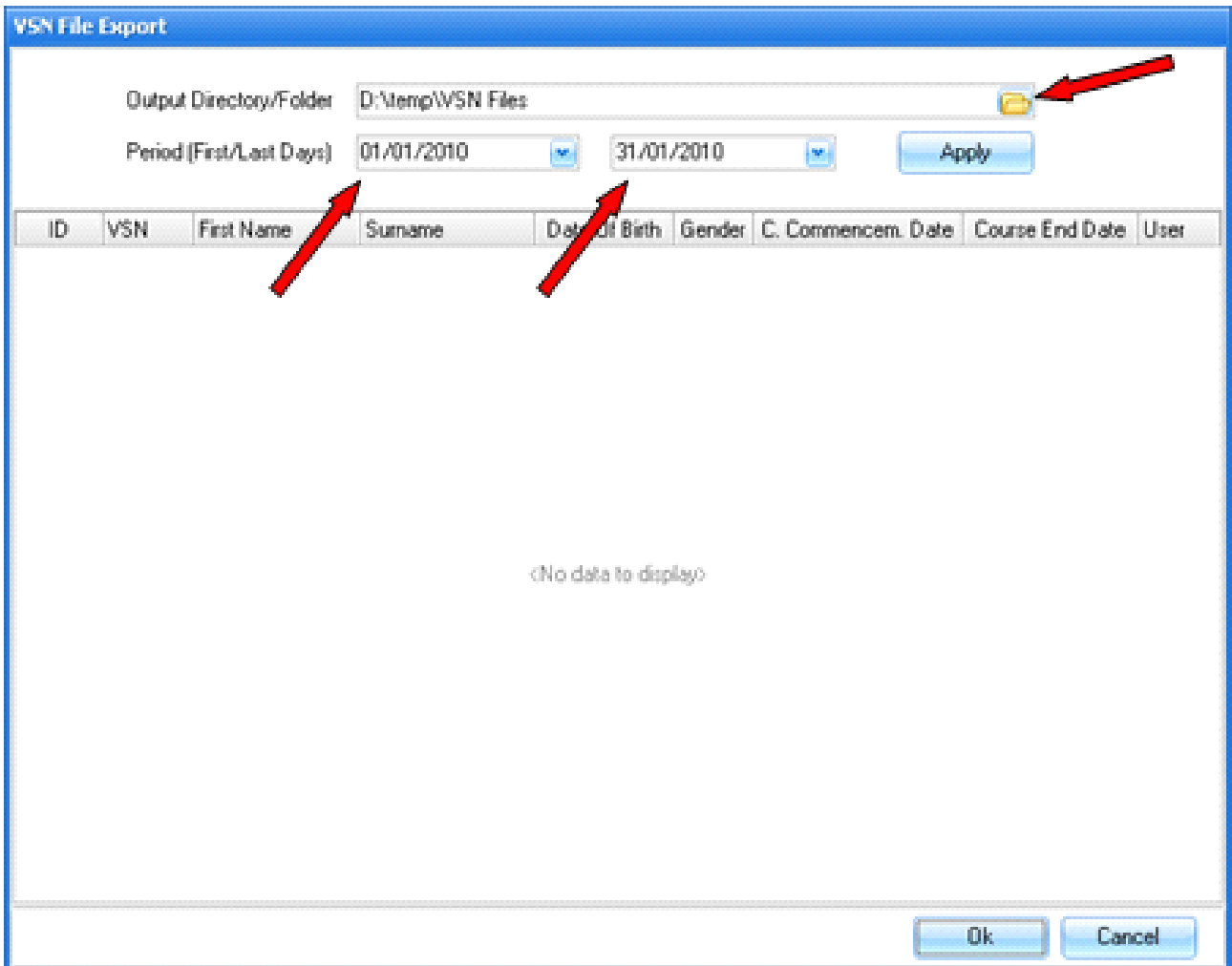
13.1.2. Generating Training Activity files for upload

PowerPro can generate the data files for upload to the VET-VSN Integration web site. To create the data file, click on **VSN/Export VSN Training file** from the **Tools** tab on the main menu:



■ Figure above - Launching the Export VSN window

A new window is displayed (see below):



■ Figure above - Export VSN window

Specify the **Output Directory/Folder**, this is the Directory/Folder where the file will be saved.

Adjust **Period** to report on by manipulating First/Last days - this will filter students (clients) who were in training during that period.

Click the **Apply** button. This will give you a preview of the data you are about to export:

VSN File Export

Output Directory/Folder: D:\temp\VSN Files

Period (First/Last Days): 01/01/2010 - 31/01/2010

Apply

ID	VSN	First Name	Surname	Date Of Birth	Gender	C. Commencem. Date	Course End Date	User
716		SAMANTHA	SMITH	10/10/1986	F	01/02/2008		RTOAD
717		SAMANTHA	SMITH	10/09/1987	F	02/02/2008		RTOAD
718		DONG	NG	01/05/1988	M	25/01/2009		RTOAD
719		NADIA	ABBAS	01/02/1989	F	28/01/2010		RTOAD
720		DOMINIK	ABBATE	01/03/1986	M	28/01/2008		RTOAD
721	122333	BARRY	ANDREWS	01/12/1988	M	28/01/2009		RTOAD
722		ADRIANA	ARTHUR	01/11/1987	F	28/01/2008		RTOAD
723		JENNY	THOMPSON	01/04/1989	F	28/01/2008		RTOAD
724		JENNY	THOMSON	14/10/1987	F	28/01/2009		RTOAD
725		JENNIFER	THOMSON	11/09/1988	F	28/01/2009		RTOAD
726		PETER	WALLIS	01/06/1986	M	20/01/2008		RTOAD
727		ANDRÉ	SAXTON	01/05/1986	M	20/01/2008		RTOAD
728		JORDAN	SMITH	01/04/1987	M	22/01/2008		RTOAD
730		LUKE	TREVISANI	02/02/1988	M	01/01/2010		RTOAD
731		QIAU	CHIA	02/02/1987	F	01/01/2010	14/01/2010	RTOAD

Ok **Cancel**

■ Figure above - Export VSN window showing the data to be exported

Click the **OK** button and the file will be created in the selected Directory/Folder. A message box will specify the absolute path/location of the data file:

PowerPro RTO V3

VSN File created successfully;
D:\temp\VSN Files\VSN_2011-02-25.txt

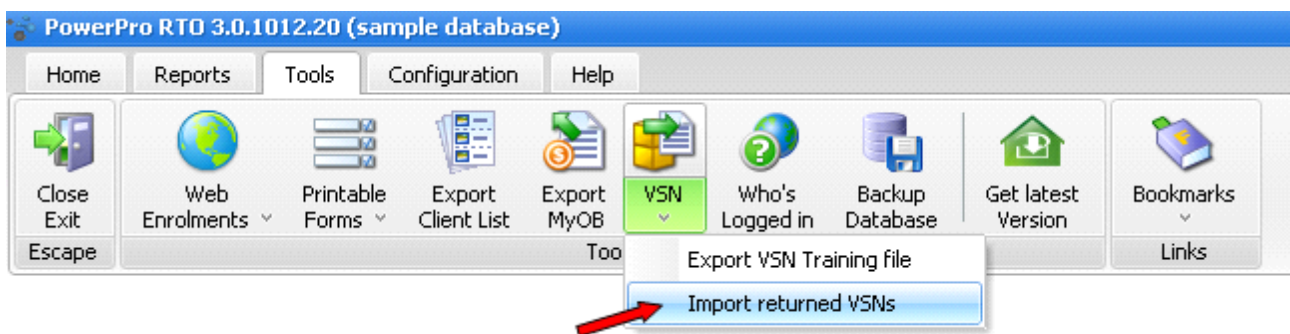
OK

Your VSN Training Activity data file has been created, you can now upload the file to the VET-VSR integration web site (<https://www.eduweb.vic.gov.au/VETVSRWebSiteTrainingOne/Default.aspx> as of February 2011)

13.1.3. Importing returned VSNs

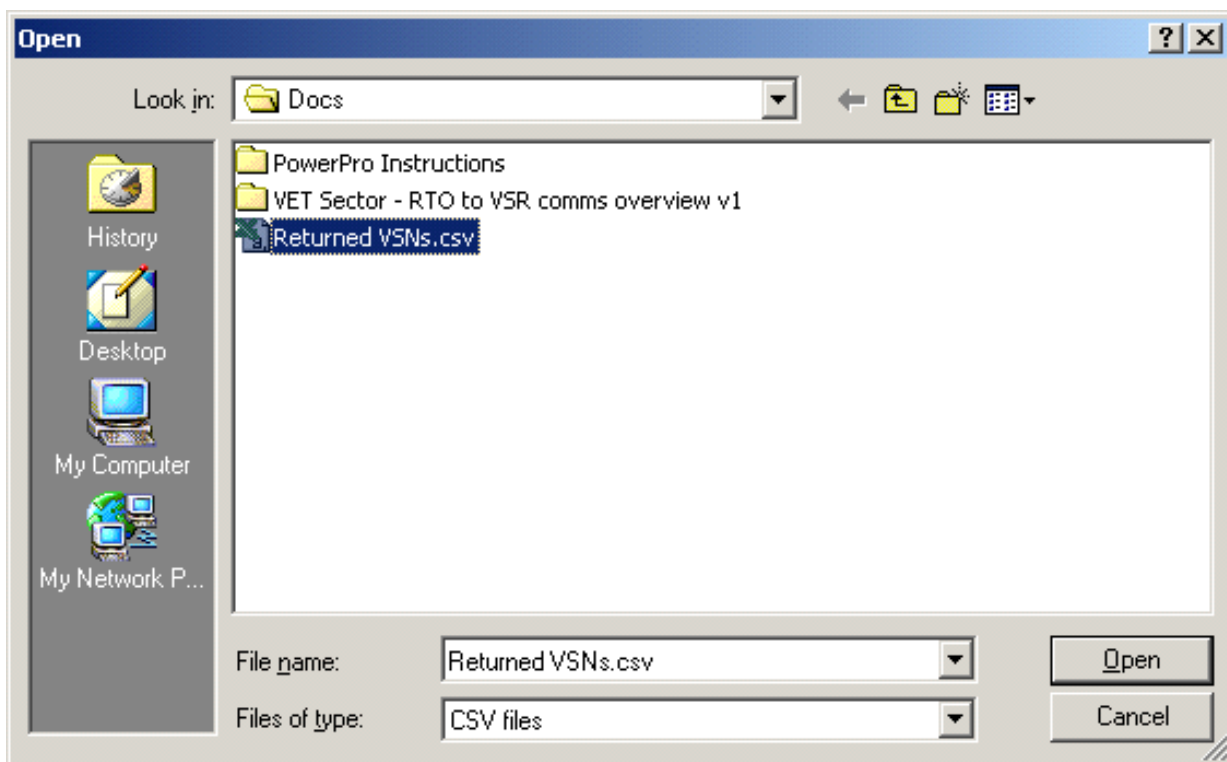
PowerPro can import returned VSN files as long as the file format complies with the sample file provided to us by the Victorian Student Number Register in February 2011.

To import the returned VSNs click on **VSN/Import returned VSNs** from the **Tools** tab on the main menu:



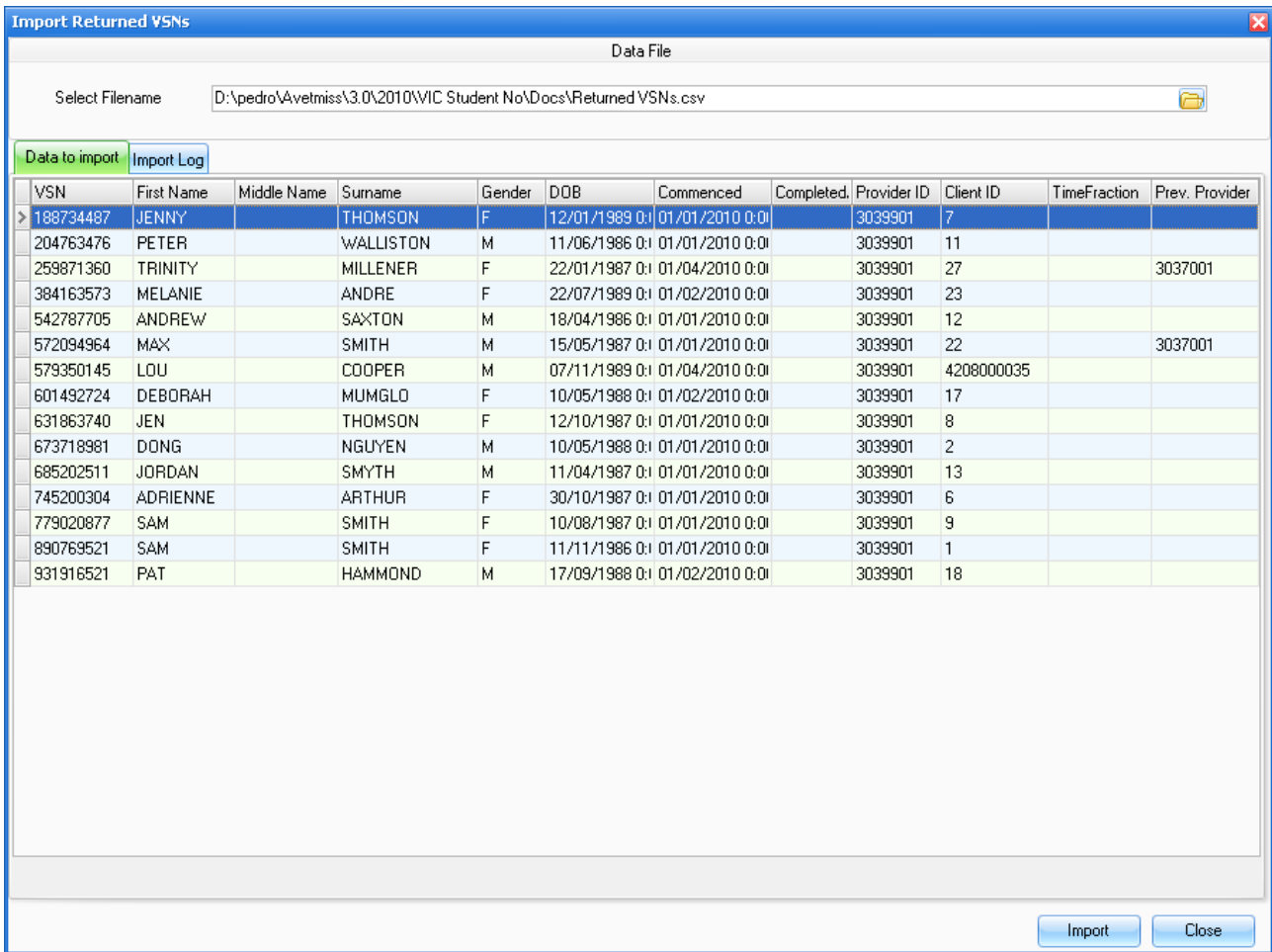
■ Figure above - Launching the Import returned VSNs window

A new window is displayed (see below):



■ Figure above - selecting the returned VSNs file to import

Once you have selected the Returned CSVs file, click **Open** to open the file. You can now preview the returned VSNs to be imported:

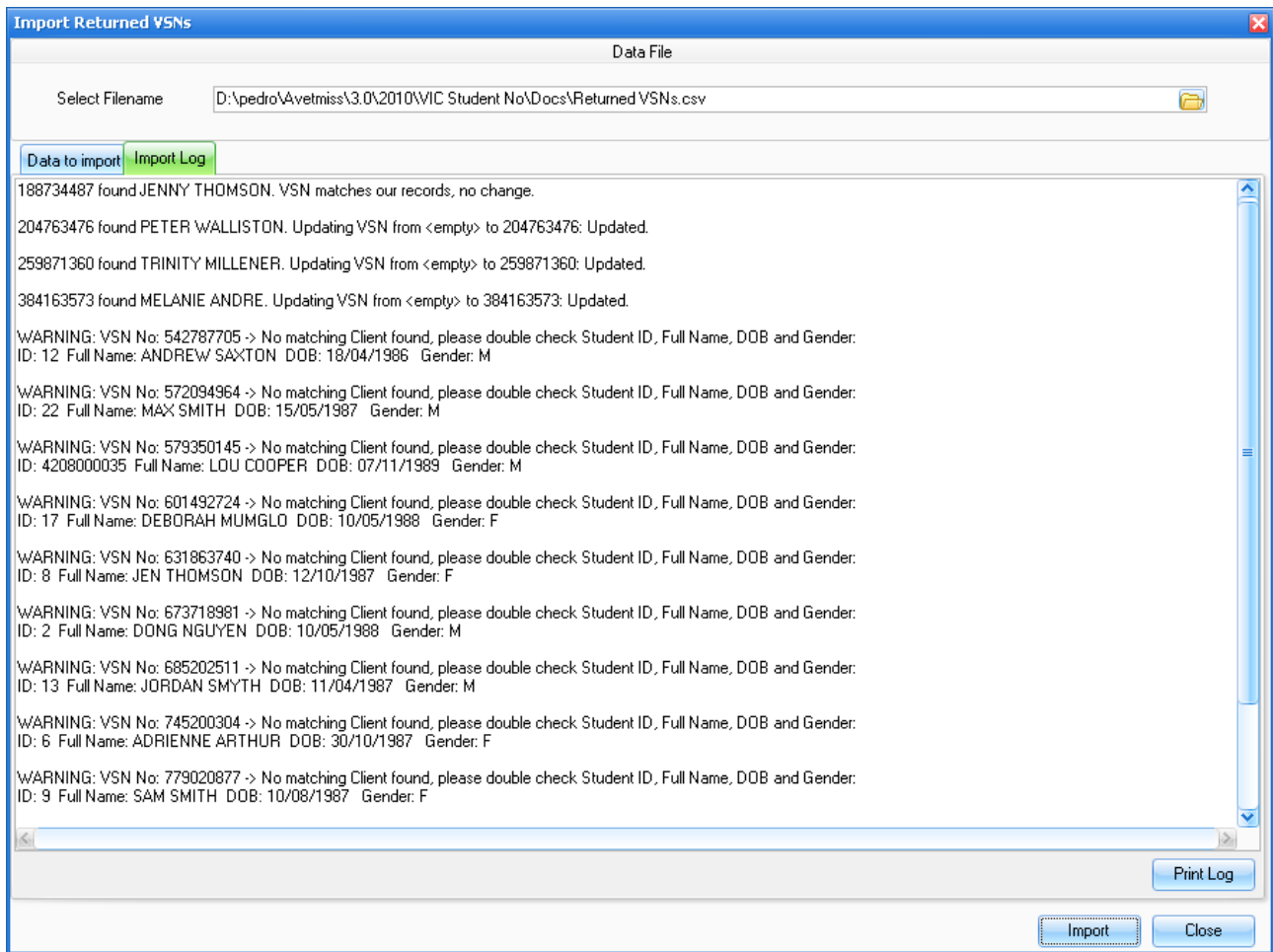


■ Figure above - selecting the returned VSNs file to import

Click Import to start the import process. The process should a few seconds.

The match is done based on Client ID, Full name, Date of Birth and Gender. All these need to match for a VSN to be updated.

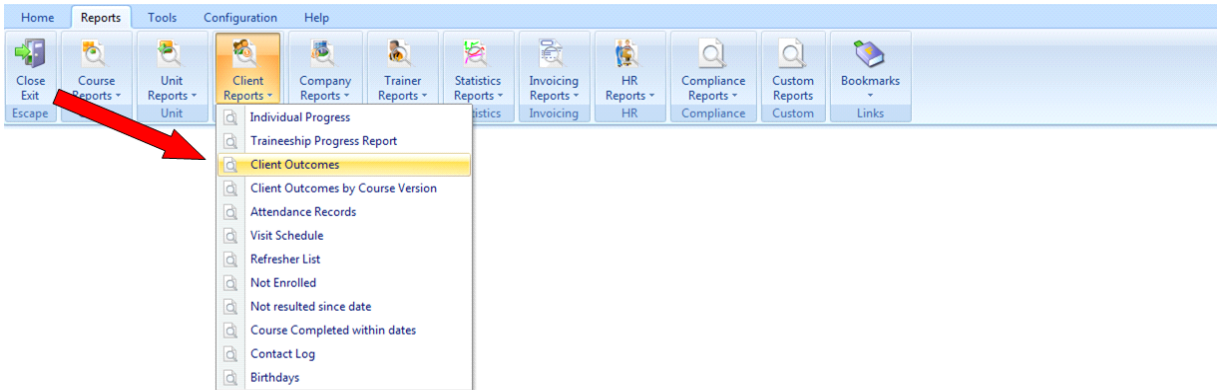
Check the Import Log upon completion for detailed information. You can print the Log using the **Print Log** button:



■ Figure above - The Import Log

14. Reports

PowerPro RTO comes with a set of pre-defined reports. These reports can be found in the “Reports” grouped logically into several dropdown menus:



■ Figure above – Reports tab with drop down menu under each Report

Please see below for a list of all reports within each group/menu

COURSE

Course list
Course structures
Training Program
Training Summary
Course Progress
Course Outcome
Course Outcome(Occupation)
Courses Bookings

UNIT

Unit Results
Current by enrolment date
Unit Outcome

CLIENT

Individual Progress
Traineeship Progress Report
Client Outcomes
Client Outcomes by course version
Attendance Records
Visit Schedule
Refresher List
Not Enrolled
Not resulted since date
Course Completed with dates
Contact Log
Birthdays

COMPANY

Company Course
Course Completion
Course/Client/Unit
AQF Documents Issued
Statements of Attainment Printed
Enrolment Count

INVOICING

Bank Deposit
Education Agent Commissions
Payment List
Advanced Payment
Invoice List
Invoice/Payment List

STATISTIC

FUNDING

Funded Enrolments

COMPLETION RATES

Unit Completion Rates

Course Completion Rates

COUNTERS

Company /Course Count

Course Count(by course name)

Course Count (by course code)

Qualification Level Count

OTHER

Basic Stats

Breakdown Stats

Client and Hour numbers

TRAINER

Trainer Details
Vocational Competencies
Trainer Schedule

HR

Gap Analysis
Qualification
Employee List

COMPLIANCE

Quality Indicators -
(Competency Completion)

CQR Client Qualification Register

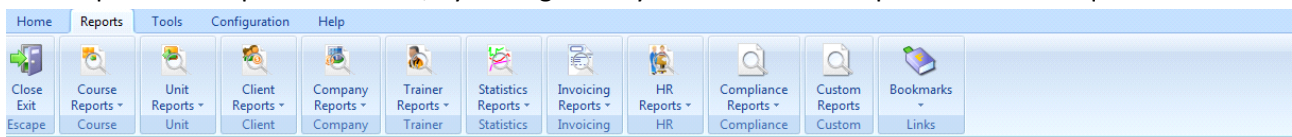
Continuous Improvement

Registering body report

CUSTOM

Specific reports can be created to target your specific data extraction requirements. The layout of these reports can be saved for later report extraction.

Once a preferred report is selected, by adding filters you can tailor the report to what is required.



Client Outcomes - Report parameters

Company/Organisation Filter

Company/Organisation filter: ACE TRAINING

Client Name Parameters

Client Name:

Select Clients

Surname	Given Names	Select
CARRASQUINHO	MARIA	<input checked="" type="checkbox"/>
MCDOLL	PAMELA	<input checked="" type="checkbox"/>
SMITH	ALISON	<input checked="" type="checkbox"/>
TRINKLER	RACHAEL	<input checked="" type="checkbox"/>
TURNER	MARK	<input checked="" type="checkbox"/>

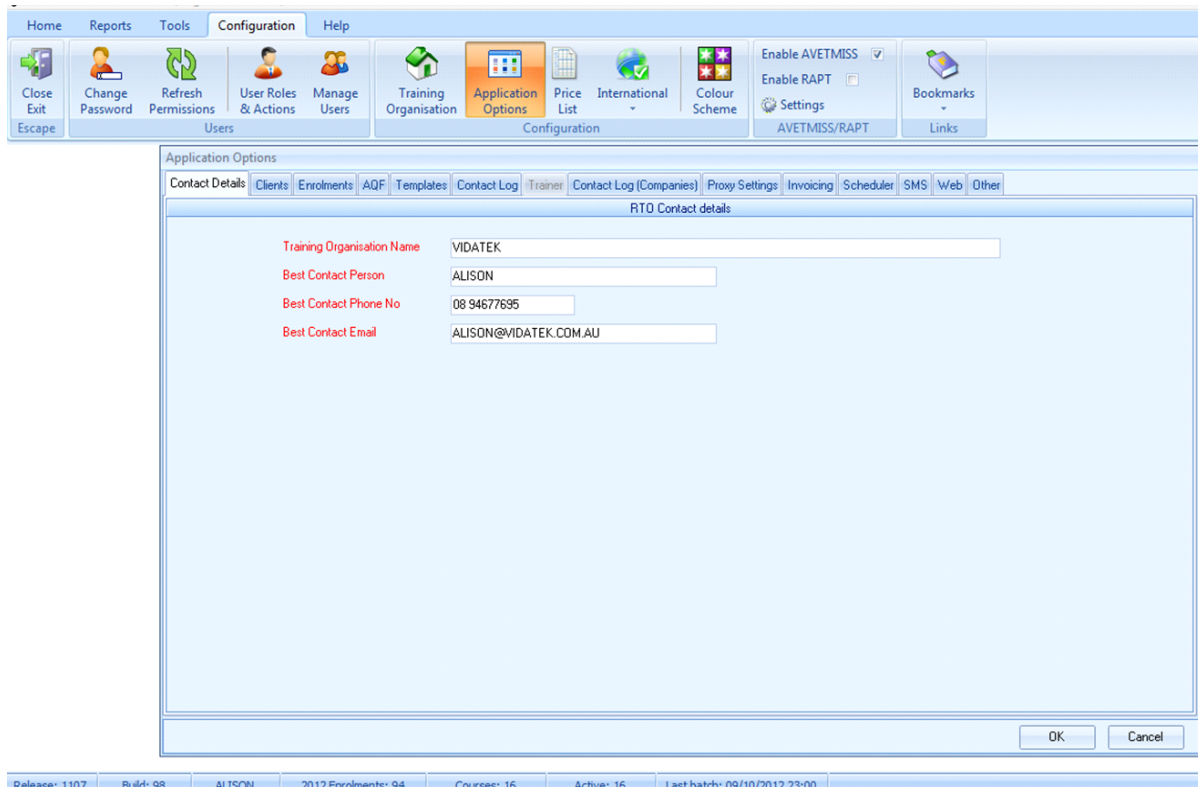
Options

Display Enrolment notes

15. System Configuration

This area is where system configuration affecting all PowerPro RTO users takes place. **Application Options** is the main configuration window of PowerPro RTO .

15.1. Application Options



■ Figure above – The Application Options window

On the Configuration tab of PowerPro RTO select **Application Options** to configure the individual areas in the software.

Areas are as above: Contact Details, Clients, Enrolments, AQF, Templates, Contact Log, Trainer, Contact Log(Companies), Proxy Settings, Invoicing, Scheduler, SMS, Web, Other.

A brief description for each tab as following:

15.1.1. Contact Details

Maintaining your company's contact details up to date is important. It helps us reaching you if required. Use the fields in the Contact Details tab to keep us (Vidatek) updated.

15.1.2. Clients

The **clients** tab is used to configure preferences/settings related to client information.

Application Options

Contact Details Clients Enrolments AQF Templates Contact Log Trainer Contact Log (Companies) Proxy Settings Invoicing Scheduler SMS Web Other

Client Code

Input Mode Automatic

Next Client ID 00000308 Change

Mandatory Fields

Date of Birth Address Details Gender

Other

Default State WA Show Client Balance

Confirm details upon Enrolment Secondary ID must be unique

Use Phone number editing masks Lock Secondary ID after Client creation

Client Card

To be eligible for a Client Card, Clients need to: Be enrolled in the course (not Withdrawn)

Free Field 1 Remember Value from last input

Free Field 2 Drivers Licence No Remember Value from last input

Free Field 3 Spouse Name Remember Value from last input

Free Field 4 Remember Value from last input

Free Field 5 Remember Value from last input

OK Cancel

■ Figure above – Client settings screen (Application options)

The client tab contains four sections:

Client Code- Select the option of automatic (recommended) or user input (manually entered) in relation to the client id.

Automatic input mode –the system generates and manages the client id number sequence. You can use set the next client ID using the **Change** button.

User Input mode - requires users to input the client id number for each client. You may wish to enter this way if your client has another ID within your RTO (e.g. Staff ID), and you want them to match.

Mandatory Fields–Select whether D.O.B, Address details and Gender are mandatory fields when creating/enrolling clients.

Other – shows a few miscellaneous options

1. Default State- select a default state, so when adding new client the state field is automatically populated.

2. Show Client Balance –Show client balance in client window.
3. Confirm Details upon Enrolment- When enrolling an existing client in a course a confirmation details box will pop up allowing users to confirm/update client details.

Client Card– Specify the rule for client card eligibility.You can do this by selecting one of three options in the drop down menu. Underneath this are Free Fields that you can custom tailor to your own needs to be printed on the client card and that can be left in memoryby checking the box on right hand side of free field and the last entry will appear when you do your next client card.

15.1.3. Enrolments

The screenshot shows the 'Application Options' dialog box with the 'Enrolments' tab selected. The 'Referrals/Lead sources' section contains a table with the following data:

Code	Description
03	Community paper
02	Internet search
04	Returning Student
01	Word of Mouth

The 'Enrolment Flags and Dates' section has the following values:

- Flag 1 label: Own Laptop
- Date 1 label: Assignment Due
- Flag 2 label: A/H Access
- Date 2 label: Assignment Due

The 'My Fields' section has the following configuration:

Use	Field Name	Use Lookup
<input checked="" type="checkbox"/>	Assessor	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Job Number	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Licence no	<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input checked="" type="checkbox"/>
<input type="checkbox"/>		<input checked="" type="checkbox"/>

The 'Results' section has the following configuration:

- Use Graded results:
- Use Mark results:
- Default Outcome for Bulk resulting: Competent

■ Figure above – Enrolments settings screen (Application options)

The **Enrolmentstab** has four sections to configure:

1. Referrals/Lead Sources- Add as many types of lead sources that maybe relevant. To add a lead source click on the **+** icon located at the bottom left of this area, a line will appear and now a code is needed to be created for the line. It can either be a number or an abbreviation of the Description i.e. Code 01 or WM (word of mouth) then add the description as “Word of Mouth”. Once you have finished click on the **✓** symbol to save the line. To delete a line, select the line and click on **X**. Referrals/Lead Source is an area that can be used in the enrolment screen on each client, so you can keep tabs on where your business is coming from. Also by using this field you are able to view a chart on the Dashboard (Tools>Dashboard) listing enrolments distribution by Lead source.

2. Enrolments Flags and Dates– located on the top right hand side of this screen. There are two “yes/no” type flags and two date fields that can be customised to your needs. The example above shows **Flag 1** labelled as “Own Laptop” and **Flag 2** as “A/H Access”. These fields appear on the enrolment screen and allow a box to be checked (yes/no) if applicable. The Date labels allow for a note to be on client enrolment details i.e. Assignment Due, Payment Due.
3. My Fields–Allows up to 6 Fields to be used. To add a field check the **use** box, add field name and check if it is a look up item. A look up item is one that lists a previous values entered for that field. Leaving the look up box un-ticked is more suitable for unique data to be entered i.e. drivers licence.
4. Results – Select to use Graded or Marked Results if preferred, or leave un-ticked if using just outcome resulting (e.g. Competent, RPL, etc).

15.1.4. AQF

The **AQF** tab is used to configure preferences/settings related to AQF documents.

■ Figure above – AQF settings Screen (Application options)

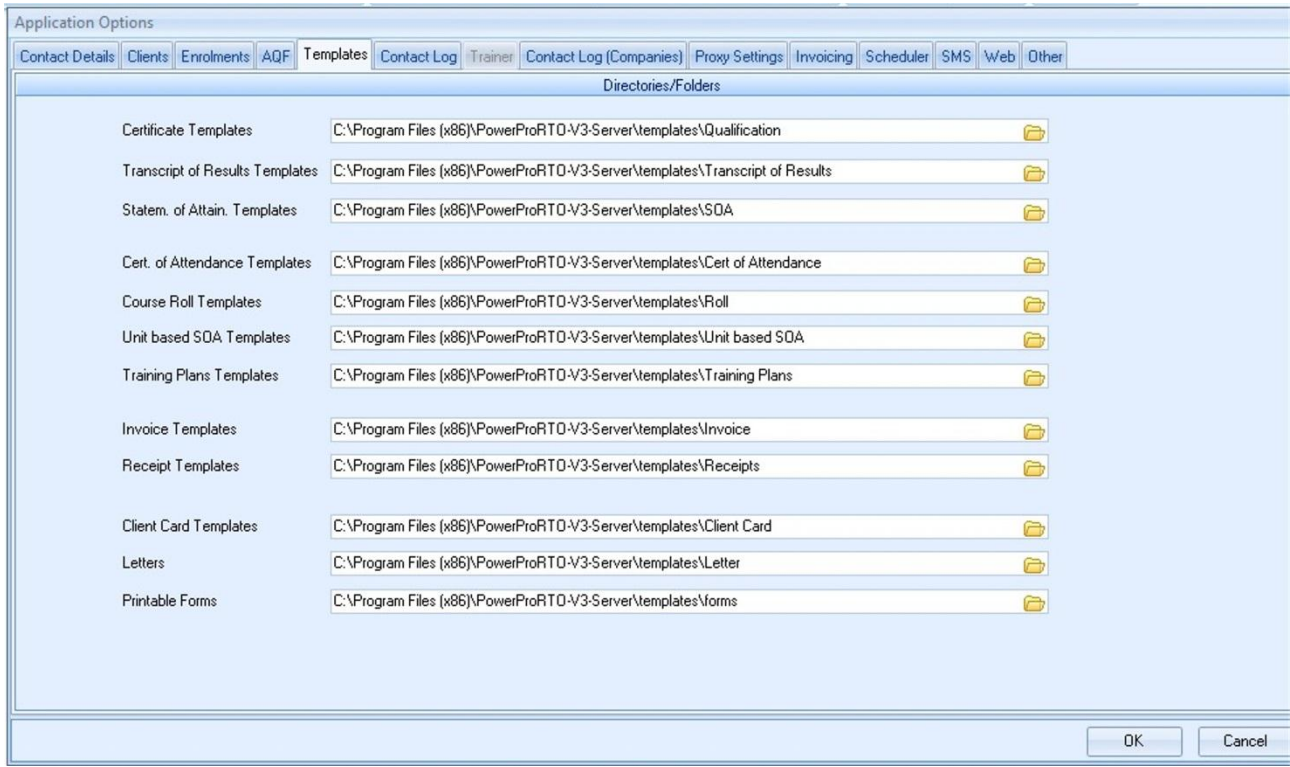
The AQF tab is split into two sections:

Document Number Format – Customise your document number prefixes i.e. “Q” for qualification and “S” for statement of attainment; choose the way AQF document numbers are generated; choose the format of the date fields that appear on AQF documents. You can also specify here the default attachment option when generating AQF documents (PDF format, MS Word format or user selection).

Other – Self-explanatory options relating to AQF documents.

15.1.5. Templates

Use the **Templates** tab to configure the location of your different templates.

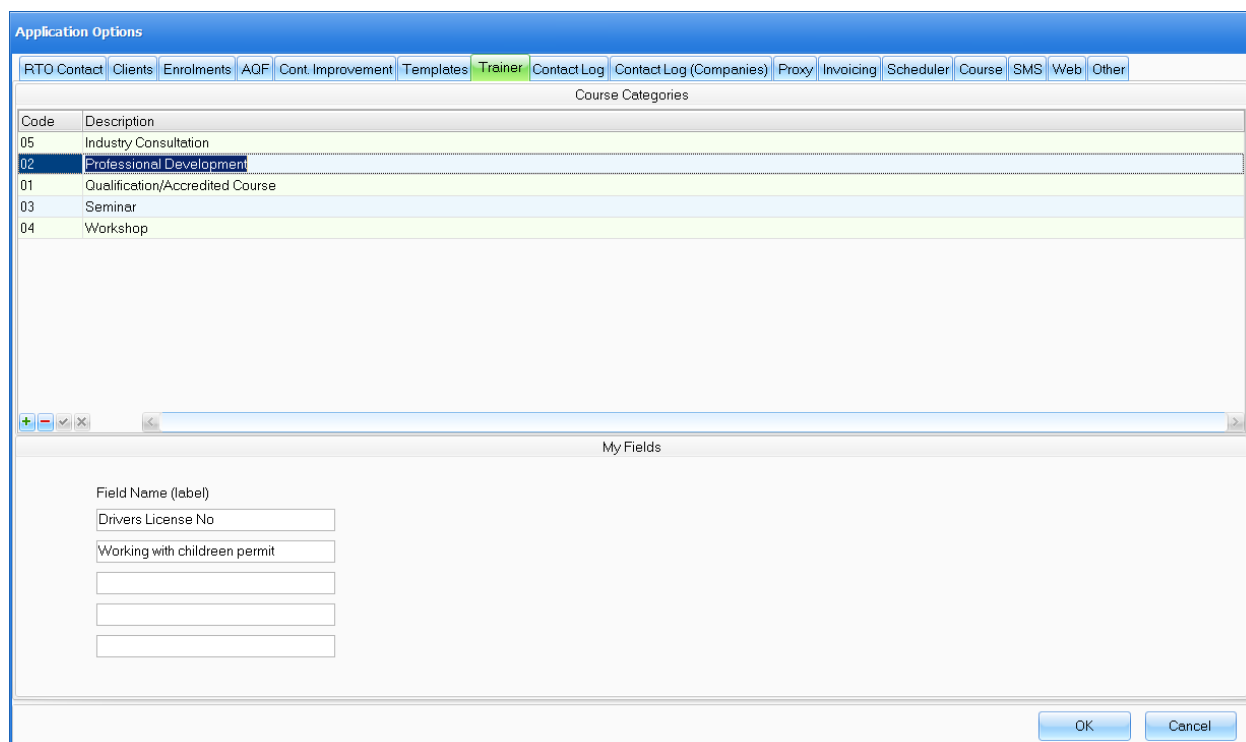


■ Figure above – Template Screen (Application options)

15.1.6. Trainer

The Trainer settings are:

- **Course Categories** – used to classify/categorise the different types of professional development events and training as part of the Courses Completed (see [Trainers and Assessors](#) this manual).
- **My Fields** – used to allocate extra fields to your trainer records.



■ Figure above – Trainer Screen (Application options)

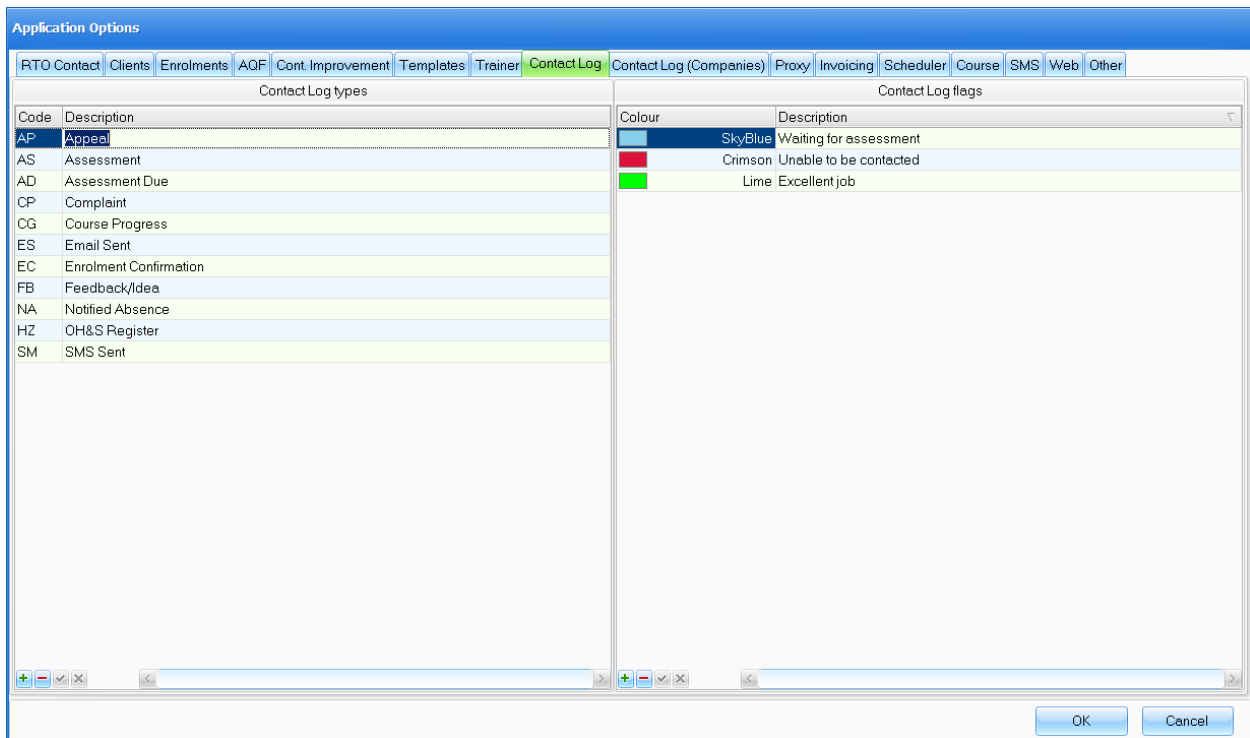
To create a new Trainer Course Category - Click on the + button at the bottom left of the table. You will then be prompted to the code area where you need to enter a new code (2 characters long) for the new record, an abbreviation is ideal. Then click into the **Description** column and enter that field. Click on the ✓ button to save the new entry. To add more entries just repeat this process.

To delete a Trainer Course Category - Select the row to be deleted and then click on the - button. A pop up window will prompt you for confirmation, click **OK** to proceed.

15.1.7. Contact Log

Contact Log is register used to track all communication and relevant events related to a student in the context of a course. The **Contact Log** settings are:

- **Contact Log types** - used to classify/categorise the different types of contact log entries.
- **Contact Log flags** – used to visually flag a contact entry with a colour associated with a meaning/message.



■ Figure above – Contact Log Screen (Application options)

To create a new Contact Log type - Click on the **+** button at the bottom left of the table. You will then be prompted to the code area where you need to enter a new code (2 characters long) for the new record, an abbreviation is ideal. Then click into the **Description** column and enter that field. Click on the **✓** button to save the new entry. To add more entries just repeat this process.

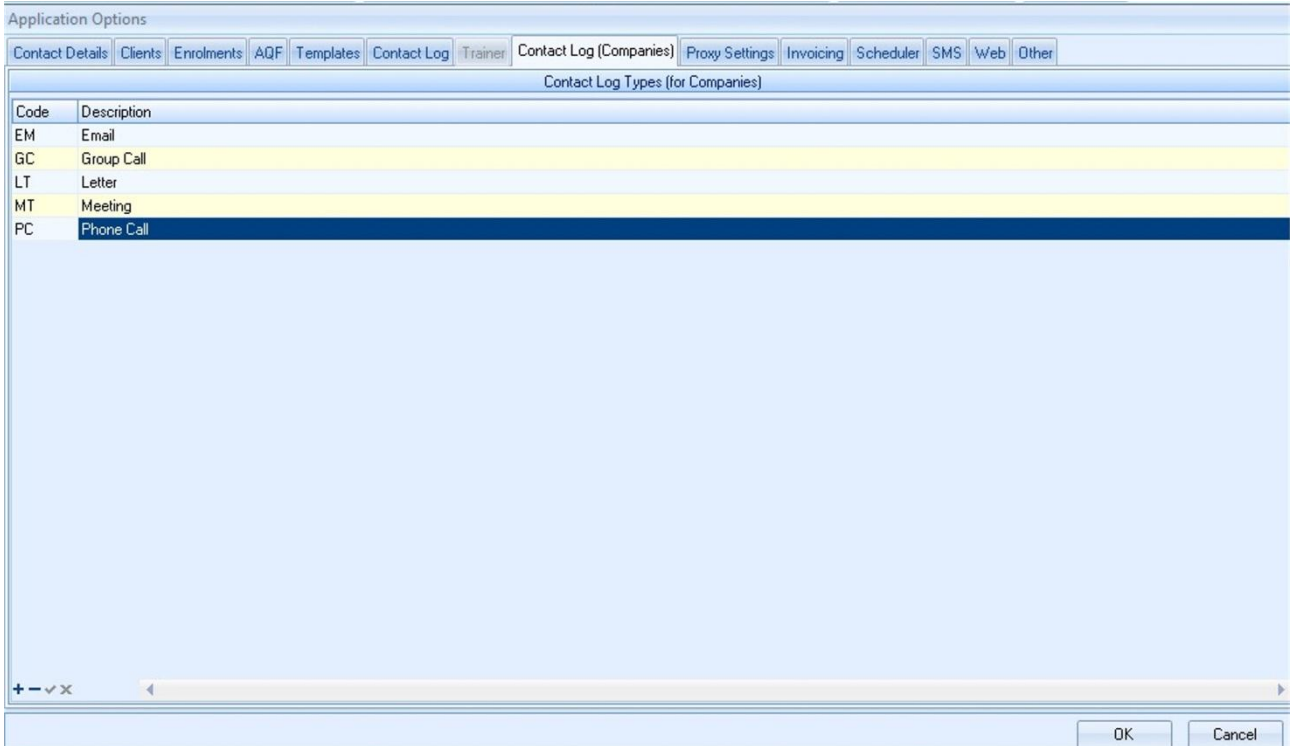
To delete a Contact Log Type - Select the row to be deleted and then click on the **-** button. A pop up window will prompt you for confirmation, click **OK** to proceed.

To create new Contact Log flag - Click on the **+** button at the bottom left of the table, you will then need to choose a colour and enter a description. Click on the **✓** button to save the new entry. To add more contact log flags just repeat this process.

To delete a Contact Log flag - Select the row to be deleted and then click on the **-** button. A pop up window will prompt you for confirmation, click **OK** to proceed.

15.1.8. Contact Log (Companies)

The Contact Log for companies follows the same concept used for the Clients Contact Log – it allows tracking communication and relevant events related to corporate clients (companies).

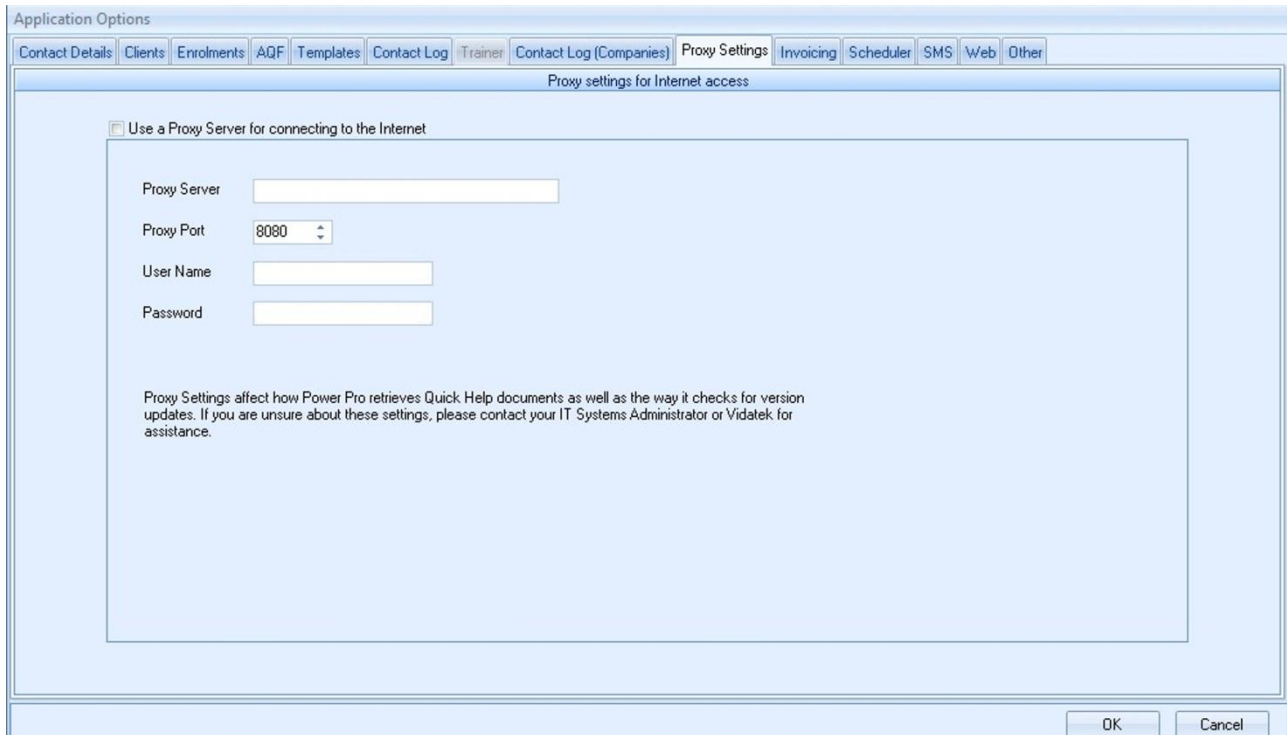


■ Figure above – Contact Log (Companies) Screen (Application Options)

The process of adding/removing Contact Log types for companies is identical to the one explained in the [previous topic](#).

15.1.9. Proxy Settings

A Proxy is used for centralised access to the Internet. This window allows you to configure PowerPro to use a proxy server when trying to access the internet:



The screenshot shows the 'Application Options' window with the 'Proxy Settings' tab selected. The window title is 'Proxy settings for Internet access'. It features a checkbox labeled 'Use a Proxy Server for connecting to the Internet'. Below this, there are four input fields: 'Proxy Server' (a text box), 'Proxy Port' (a spinner box set to 8080), 'User Name' (a text box), and 'Password' (a text box). At the bottom of the window, there are 'OK' and 'Cancel' buttons. A note at the bottom of the settings area reads: 'Proxy Settings affect how Power Pro retrieves Quick Help documents as well as the way it checks for version updates. If you are unsure about these settings, please contact your IT Systems Administrator or Vidatek for assistance.'

■ Figure above – Proxy Settings screen (Application Options)

NOTE: you might need assistance from an IT staff member to configure this section

15.1.10. Invoicing

PowerPro RTO has the capability to generate and track invoices/payments for student fees (see [Invoices and Payments](#) in this manual). This screen allows configuring some preferences related to the invoicing subsystem:

The screenshot shows the 'Application Options' dialog box with the 'Invoicing' tab selected. The 'Invoicing' section includes the following settings:

- Use Invoicing Fields:
- GST Percentage: 0.10
- GST Included for new Price list items:
- Due Date after: 21 days
- Default Pay Method: Cheque
- Items in "Add Lines" menu: 20 (Number of items listed on the "Add Lines" drop down menu of the Invoice)
- Allow Payment date before Invoice Date:

The 'Invoice Numbers' section includes the following settings:

- Input Mode: Automatic
- Next Invoice No: 21 (with a 'Change' button)

Buttons for 'OK' and 'Cancel' are located at the bottom right of the dialog.

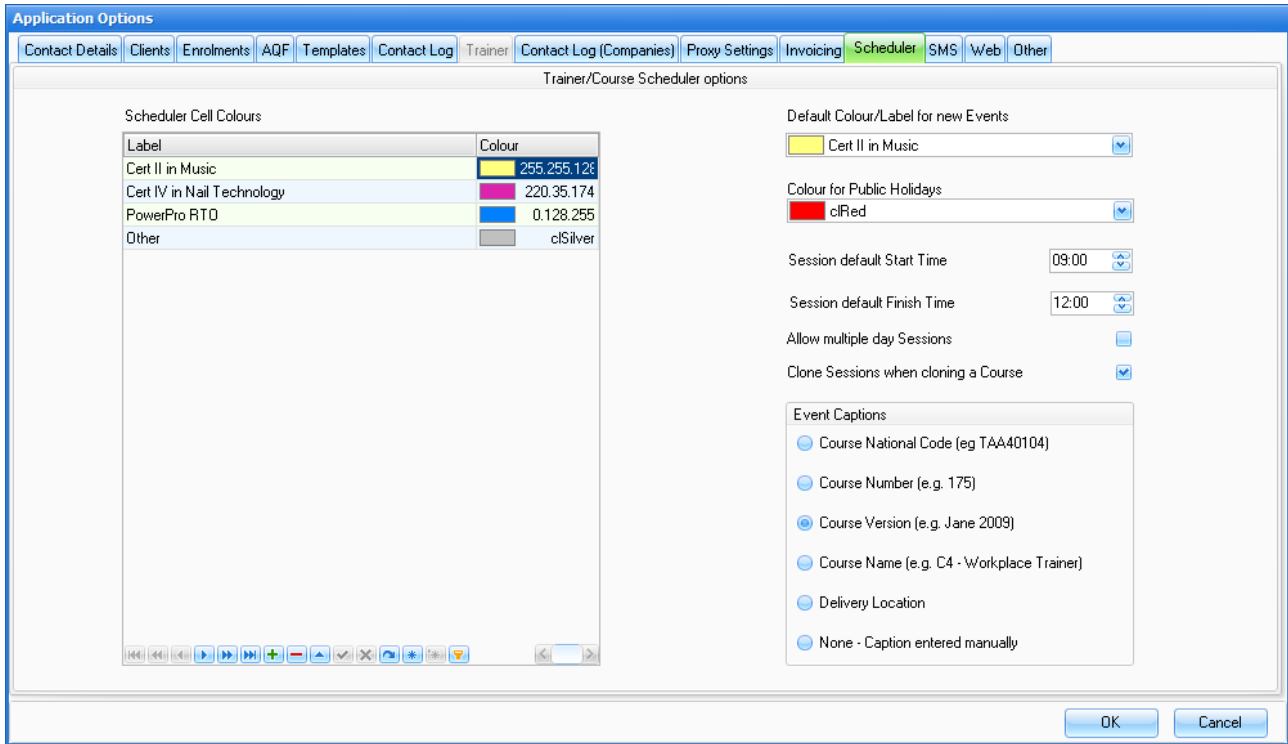
■ Figure above – Invoicing Screen (Application Options)

The Invoicing tab allows you to configure the terms of your billing invoice:

- **Use invoicing fields:** enable/disable the invoicing subsystem.
- Directly below choose **GST** percentage, if applicable.
- On the right side of this select if new [price list](#) item is to include GST.
- Next Field is **Due Date**, select the terms (days) in which invoices are to be paid by (by default).
- The **Default Pay Method** field sets a default payment method for when receiving payment for an invoice.
- **Allow payment before invoice date:** self-explanatory.
- The bottom half of this screen enables you to either automatically generate new invoice numbers or input these numbers manually. If you choose the automatic mode you are able to set the next invoice number by clicking on the **Change** button and then entering the next number.

15.1.11. Scheduler

The Trainer Scheduler is a calendar view of course sessions linked to trainers (see [Trainer Scheduler](#) in this manual). The **Scheduler** tab of Application Options configures some preferences for the calendar.



■ Figure above – Scheduler screen (Application Options)

The **Scheduler Cell Colours** table allows colour coding the different courses so the sessions are displayed in the corresponding colours on the calendar.

The **Default Colour/Label for new Events** sets a default for the **Colour/Course type** field when creating a new session.

The **Colour for Public Holidays** is the calendar background colour used when displaying public holidays on the calendar.

The **Session default Start** and **End time** fields are used as default times when creating a new session.

The **Allow multiple day Sessions**, when set, allows a session to span for more than 24 hours. These sessions as shown as large blocks in the calendar and are not suitable for attendance records. This option is unchecked by default.

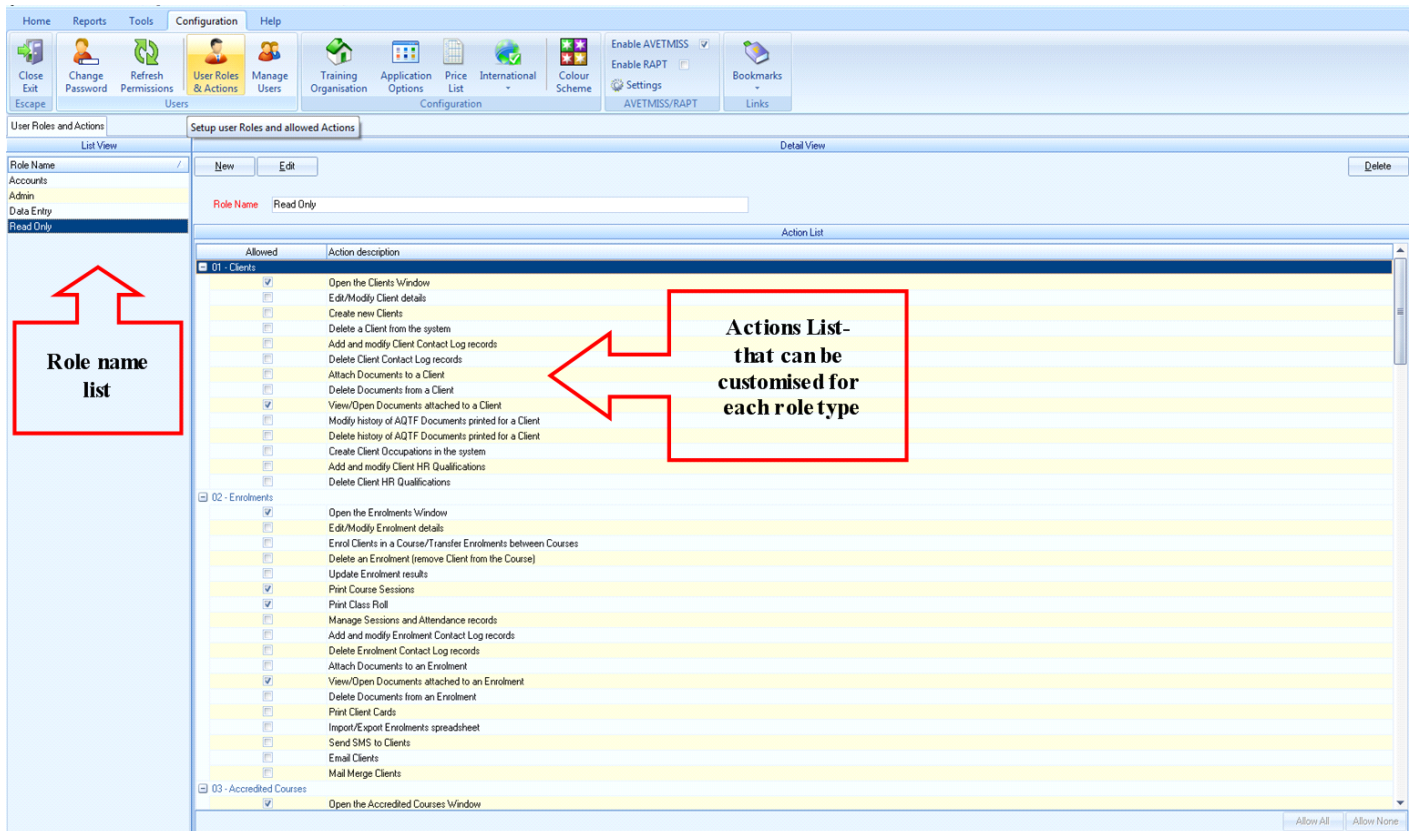
The **Clone Sessions when cloning a Course** determines whether the sessions from the original course are cloned (copied) when a course is cloned (see [Clone an existing Course](#) in this manual).

The **Event Captions** option determines the default text to be displayed in a session calendar cell.

NOTE: The Trainer Scheduler is not available in PowerPro RTO Lite version.

15.2. User Roles and User Management

PowerPro allows setting up different access levels to the system. These are called *user roles* and consist of a set of allowed actions which map to menus and buttons. By enabling an action within a user role you are allowing any PowerPro user who is granted that role to perform the action.



■ Figure above – User Roles and Actions screen

To access the user roles window, click on the **Configuration** tab and then on the **User Roles and Actions**.

15.2.1. Creating a new user role

- I. Click on **New** to add a new user role (i.e. “Data entry”, “Finance”, “Read only”)
- II. Enter new role name in **Role name** field and press save. The action list will now appear.
- III. In the Action List, check/tick the actions allowed for the new user role.
- IV. Press **Save** to save the new role.

15.2.2. Editing an existing user role

Click on the role name in which you wish change, in the detail view select the edit button next in the below user actions list you can now edit user role in the action list. When finished entering selection, save new changes.

To delete user role-

In the role name list select the user role in which you wish to remove, and then on the very far right of the detail view area you will see the delete button. Click to delete user and you will have a pop up that ask you if you wish to go ahead with the deletion, if you don't then select cancel.

Appendix A Glossary

Acronym	Meaning
ANZSCO	Australian and New Zealand Standard Classification of Occupations
AVETMISS	Australian Vocational Education and Training Management Information Statistical
ANTA	Australian National Training Authority
AQF	Australian Qualification Framework
AQTF	Australian Qualification Training Framework
CIR	Continuous Improvement Register
CMS	Curriculum Management System - for managing accredited training products
CPS	Contracted Program of Study
CQR	Client Qualification Register
CRICOS	Commonwealth Register of Institutions and Courses for overseas students
DEEWR	Department of Education, Employment and Workplace Relations
EEO	Equal Employment Opportunity
E&A	Enrolment and Attendance
EAC	Education Advisory Council
FAQs	Frequently Asked Questions
GTCs	Group Training Companies
HR	Human Resources
ICT	Information and Communication Technology
IR	Industry Relations
ISC	Industry Skills Council
IT	Information Technology
ITAB	Industry Training Advisory Board
LLN	Language ,Literacy and Numeracy
LOTE	Language other than English
NAC	National Apprenticeships Centre
NAWT	National Assessors and Workplace Trainers
NQC	National Quality Council
NRT	Nationally Recognised Training
NTIS	National Training Information Service
OLC	Online Learning Community
RAPT	Resource Allocation Payment Training (WA Only)
RCABs	Registration and Course Accreditation Bodies
RCC	Recognised of Current Competency
RTO	Registered Training Organisation
RPL	Recognised Prior Learning
SOA	Statement of Attainment - issued when a student completes one or more units (as part or not a full qualification)
STARS	State Training and Recognition System
TAC	Training Advisory Council
TMS	Training Management System
TRS	Training Records System
VSN	Victorian Student Number
VET	Vocational Education and Training
VEGAS	Vocational and Educational Guidance for Aboriginal Schemes
VETiS	Vocational Education and Training in Schools
VIIP	Vocational Infrastructure for Indigenous People

VL

Vocational Learning
