VIDATEK

PowerPro RTO

Operations guide

VERSION 3.0.1401

This guide can be found online using the link below:

http://powerprorto.com.au/tms/op-guide.pdf

About this Document

About PowerPro RTO

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

About this guide

This guide is designed to provide a quick reference for PowerPro RTO users. It covers the RTO day-to-day tasks used on the operational side of VET record keeping.

Other references

For an in depth reference on PowerPro RTO we suggest reading the user manual which can be downloaded from the *Help* menu of PowerPro RTO.

Additionally, there is a Frequently Asked Questions web site for PowerPro RTO which is accessible from the *Help* menu.

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1. 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	Employee Induction
Example of National Code	CUS20105	N/A
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

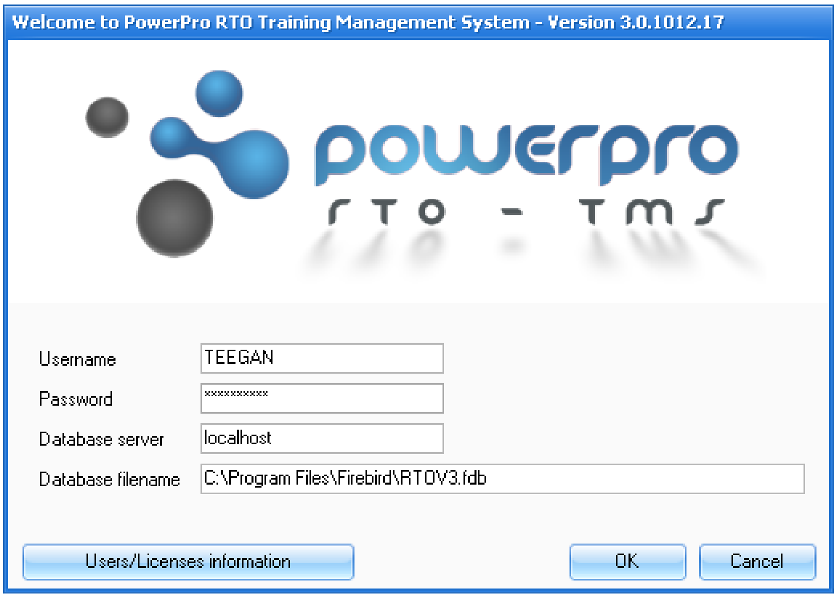
Accredited Courses can be made of a couple of Units (for licensing purposes for example, e.g. Responsible Service of Alcohol, white card, operate a forklift, etc) or they can form a full Qualification. In the first case (usually referred to as “Short Courses”) Clients are issued with a Statement of Attainment 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. Getting started

2.1. Logging in to PowerPro RTO



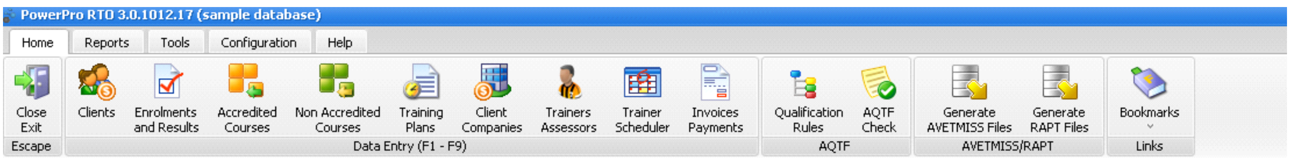
- **Figure above – PowerPro RTO login screen**

When logging in to PowerPro all fields must be entered. If you have an empty value for *Database server* or are unsure about the *Database server* or the *Database filename* please lookup these values on another PowerPro workstation in your organisation.

NOTE: None of these fields is case sensitive.

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.

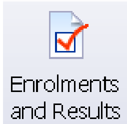
Shortcut Key	Outcome
Esc	Close: close the current window
F1	Clients: maintain or search client details.
F2	Enrolments: maintain course enrolments and results.
F3	Enquiries
F4	Accredited courses: maintain accredited course structures and units of competency.
F5	Non-Accredited courses: maintain non- accredited course structures and in-house modules
F6	Training Plans: maintain individual client/enrolment training plans
F7	Client companies: setup and maintain client company information.
F8	Trainers: setup and maintain trainer and assessor information.
F9	Scheduler: calendar based trainer-scheduling tool.
F10	Invoices & Payments: maintain invoices and payments

■ **Table above - PowerPro shortcut keys**

2.3. Mandatory fields

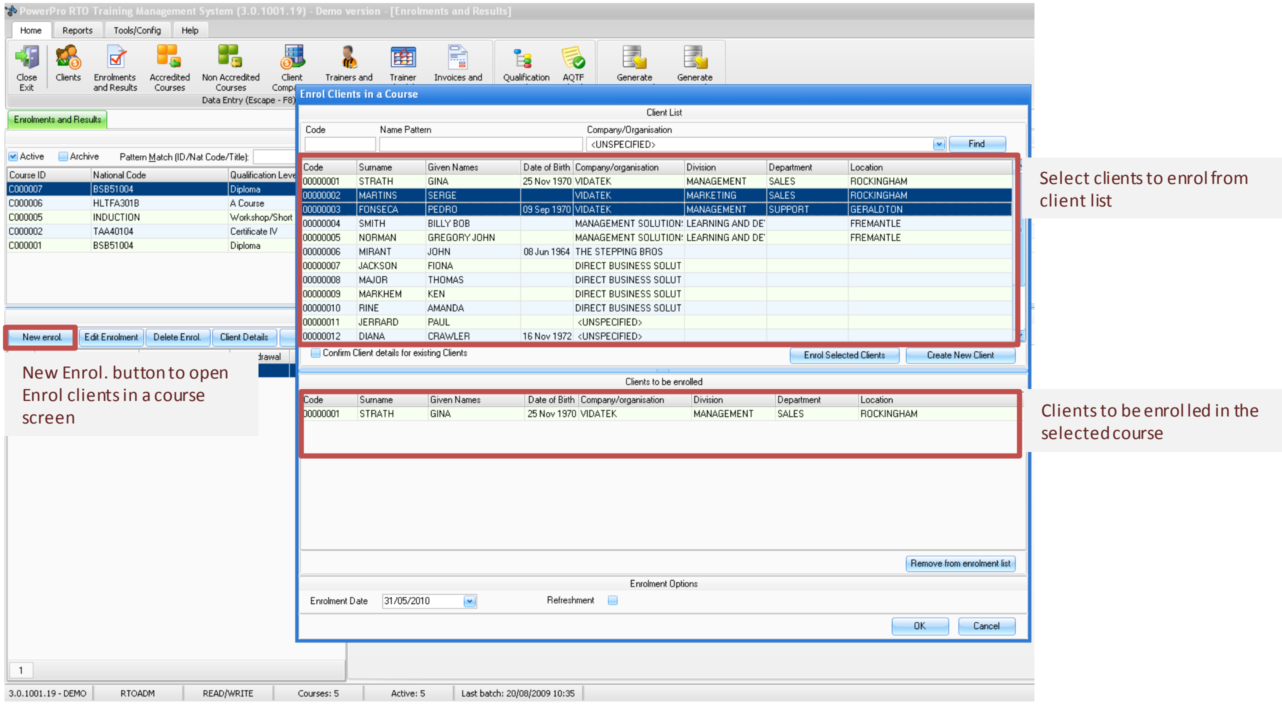
Mandatory fields are shown in **red** while optional fields are labelled in **black**. You must enter a value for all mandatory fields in order to save a record in the database.

3. Enrolments and results



3.1. Adding clients to a course

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



■ **Figure above - Enrol clients in a course screen**

Select the clients to enrol from the client list (top section of the screen), and click the **Enrol Selected Clients** button to add them to the clients to be enrolled list (bottom section of the screen).

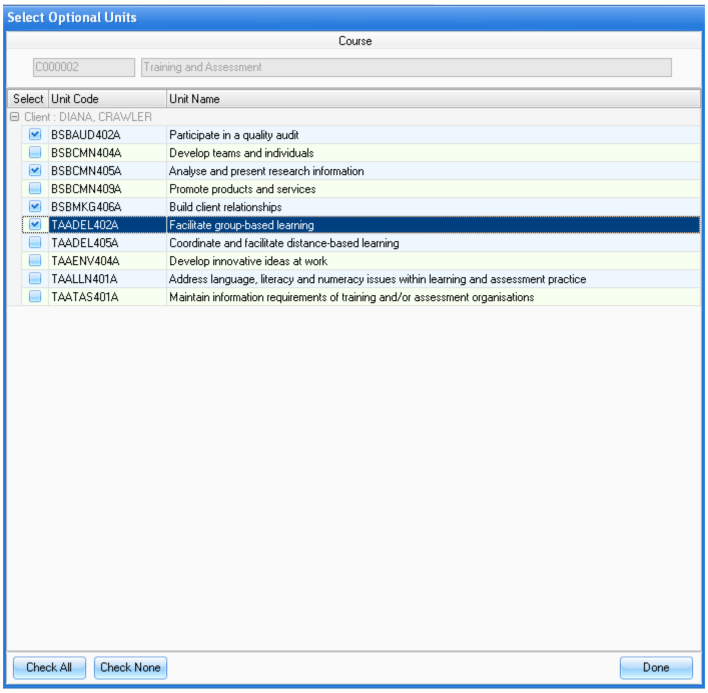
You can search for the client using the **Find** function. Enter the surname (or part of it) in the **Name Pattern** box and click the **Find** button to find any matches.

If you do not find the client in the list it means this is a new client and therefore needs to be entered in the database. Click on **Create New Client** button. The New client screen will open in a new window. See the next section (*Adding a new client to the system*) for further information.

Use the **Enrolment Date** field to set the date of enrolment for all clients you are about to enrol.

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

If the course contains optional units, 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 checking the corresponding checkboxes:

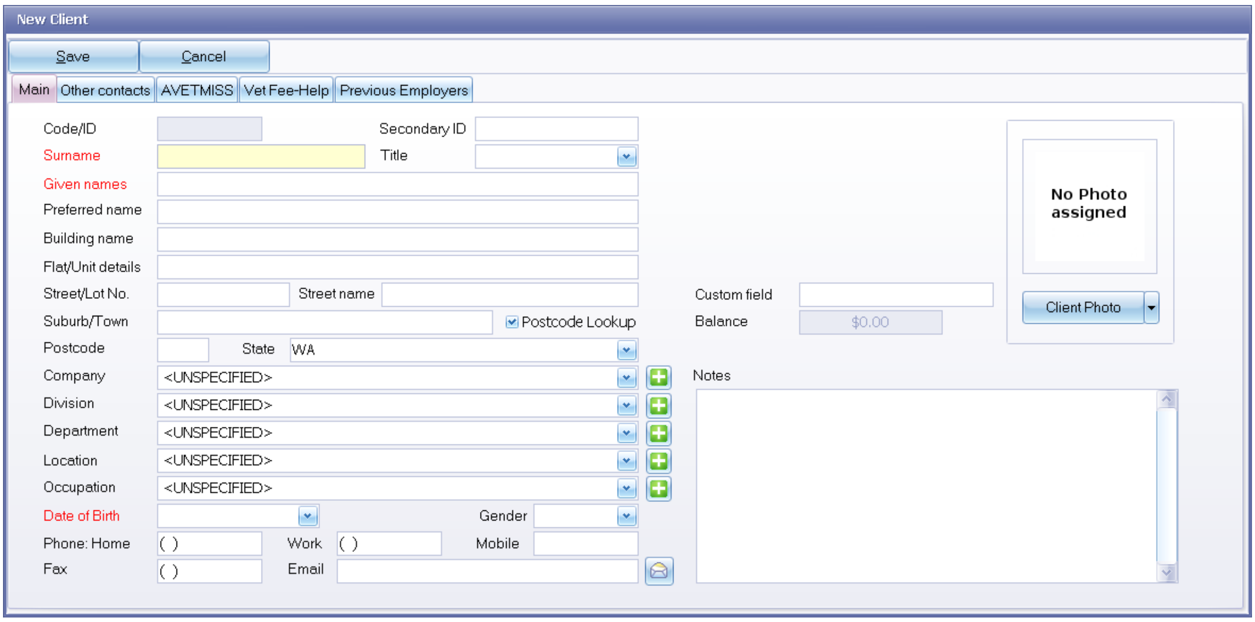


- **Figure above - Select optional units screen**

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

3.2. Adding a new client to the system

As mentioned above, you can create a client on the fly when you are enrolling them into a course. The client details panel will appear as per image below:

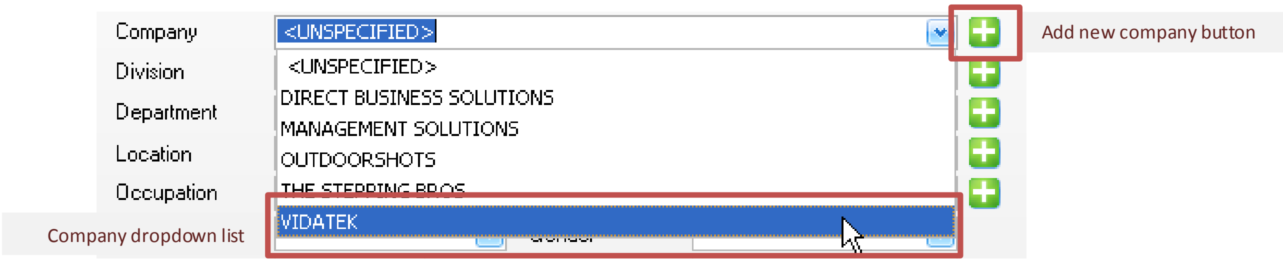


- **Figure above – New Client**

Fill in all mandatory fields (labelled in red) and any other fields as relevant.

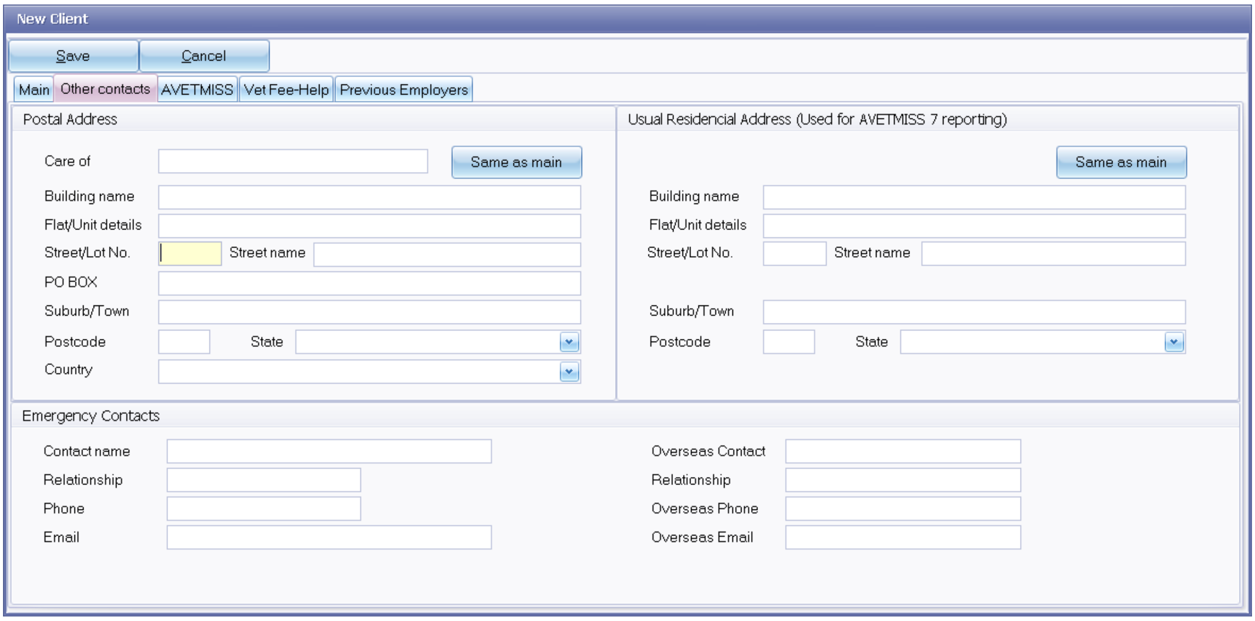
To move across fields, use the mouse, the **Tab** key or the **enter** key. To enter additional data (e.g. postal address, AVETMISS/RAPT data) select the corresponding tab at the top of the client window.

Some fields are shown as a dropdown list of existing values. 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 green **+** button to the right of this field to bring up the **Client companies** screen.



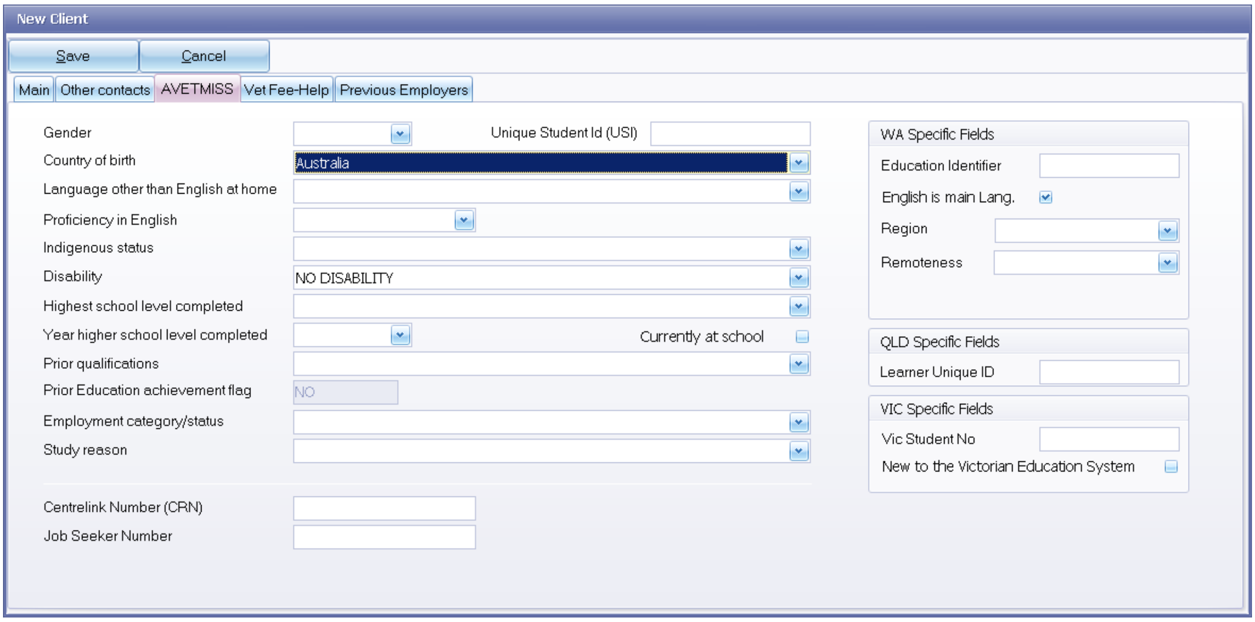
■ **Figure above - Assigning a company to a client**

Use the **Other contacts** tab to set postal address and/or emergency contacts for the client.



■ **Figure above – Other contacts tab**

Select the **AVETMISS** tab to enter relevant AVETMISS data for this client:

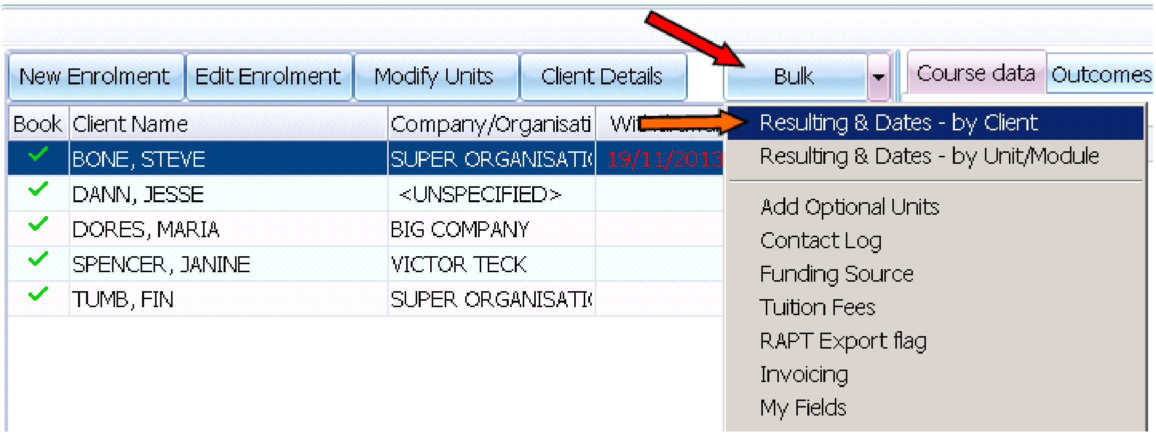


■ **Figure above – Client AVETMISS details**

Note: the relevant AVETMISS fields are **Gender** and from **Country of Birth** down to **Study reason**.

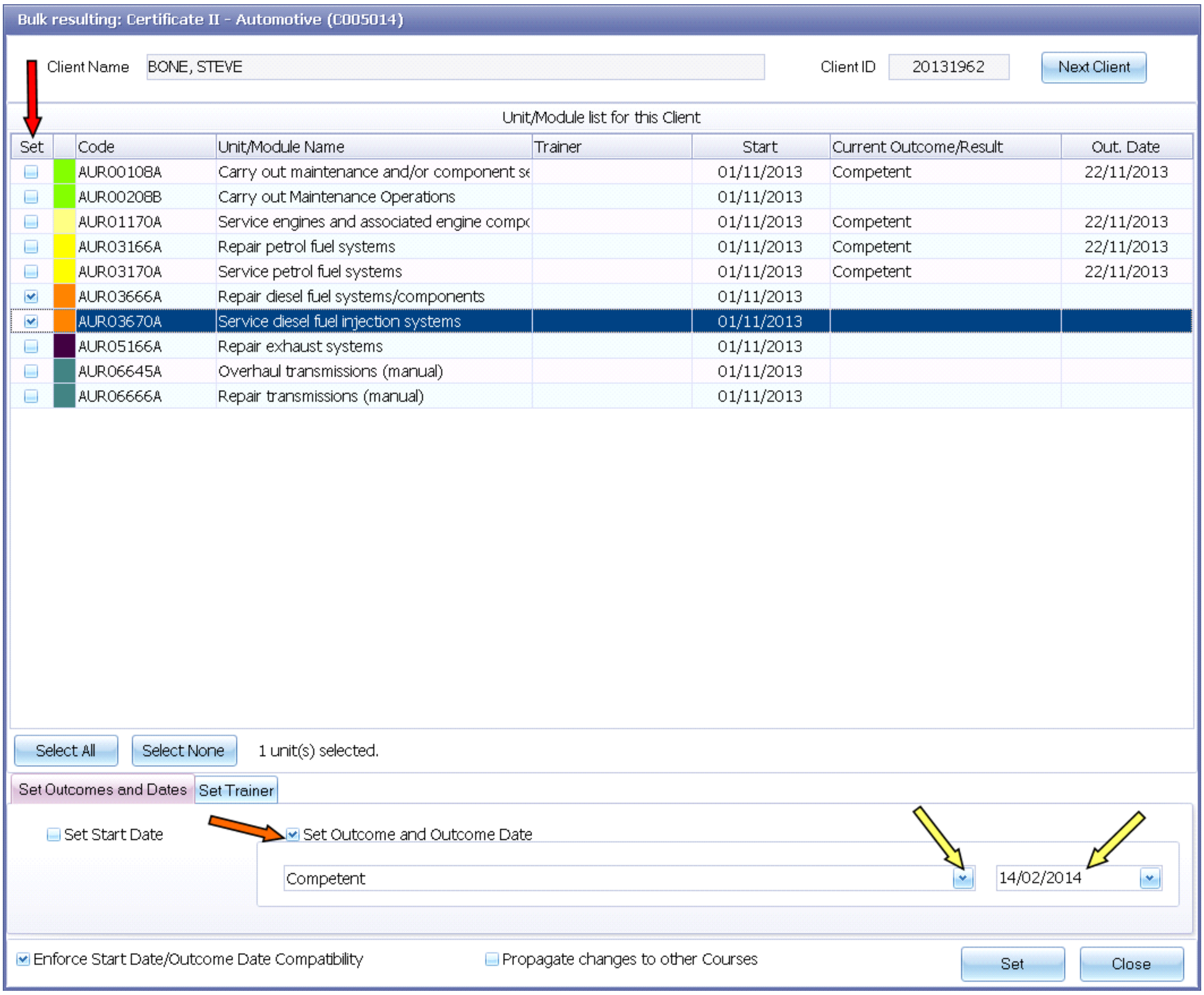
3.3. Updating client results

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:



■ **Figure above – Bulk resulting by Client**

The **Bulk resulting** screen will appear:



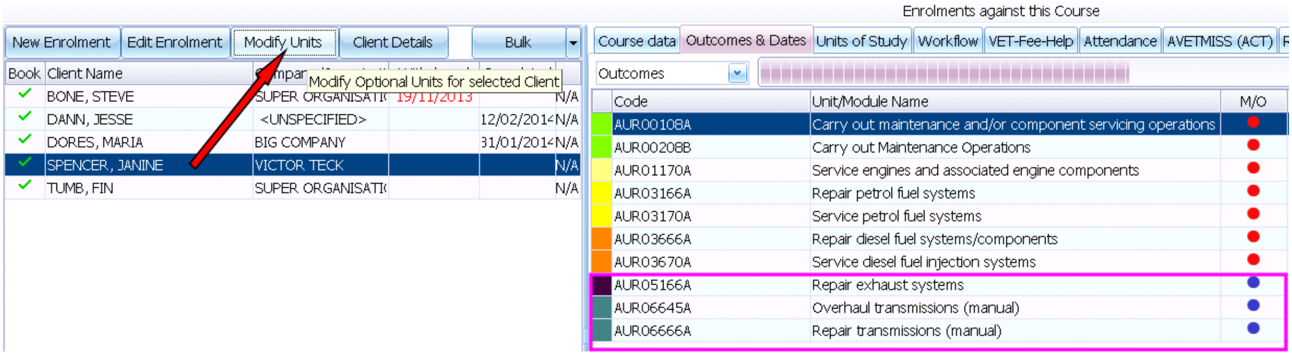
■ **Figure above – The bulk resulting by Client window**

1. Check the boxes in the **Set** column for each unit/module you want to update. Click the **Select All** button to check all the checkboxes if required.
2. Check the box to **Set Outcome and Outcome Date.**
3. Select the outcome/result (defaults to “Competent”) from the list and specify the result date.
4. Click the **Set** button to apply changes.

To update other results for other units or modules for this client, repeat the above steps. Once you have finished updating results for the client you can navigate to the next client in the course by clicking on the **Next Client** button.

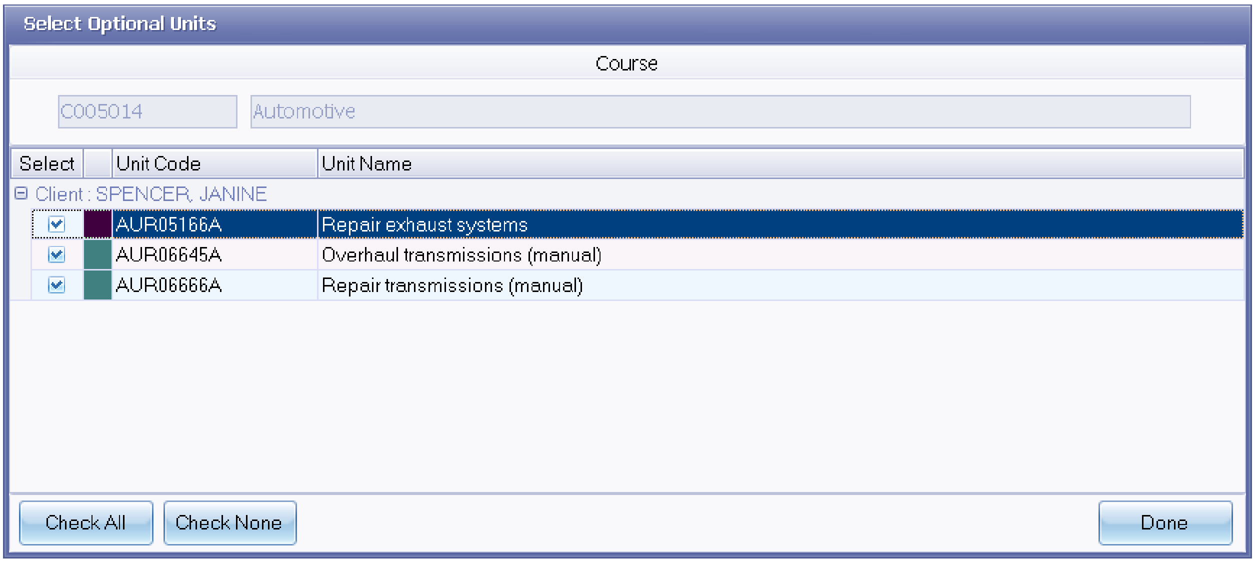
3.4. Modifying client units selection

Courses are often made of mandatory and optional units. Mandatory units are for everyone in the course while optional units can be selected differently for each client. To modify the optional units for a client please do as follows:



■ **Figure above – Modifying Client units**

1. Highlight the relevant client (*Spencer, Jane* in the example above).
2. Click on **Modify Units**.
3. The Select Optional Units window pops up:



4. Check the boxes for the relevant units and click on **Done**.

NOTE: Removing an optional unit from the client enrolment will drop the student result (if any) for that unit.

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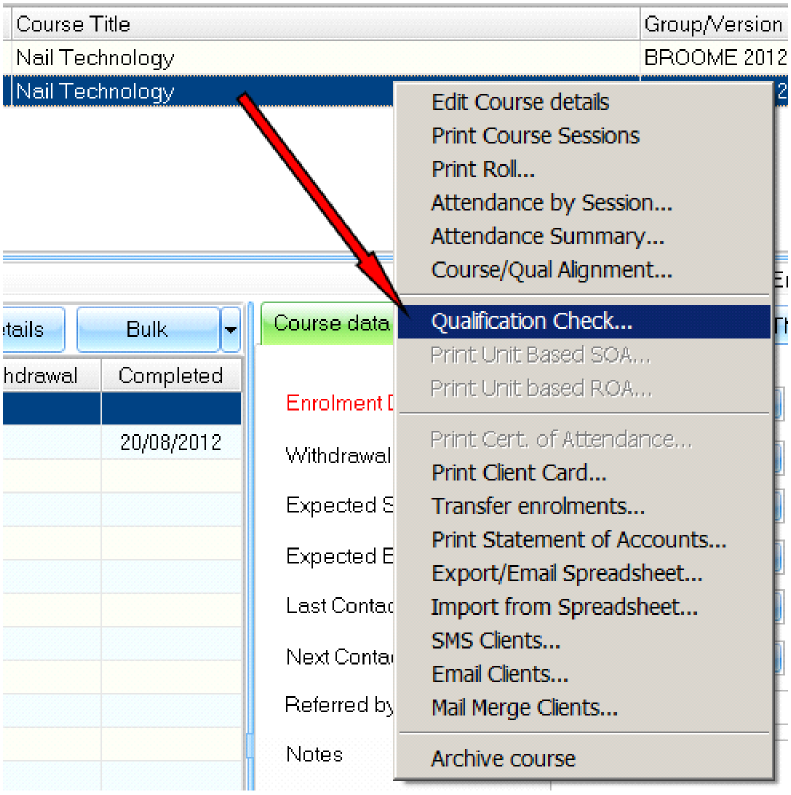
cord will be saved in the database.

3.5. Printing Certificates and Statements of Attainment

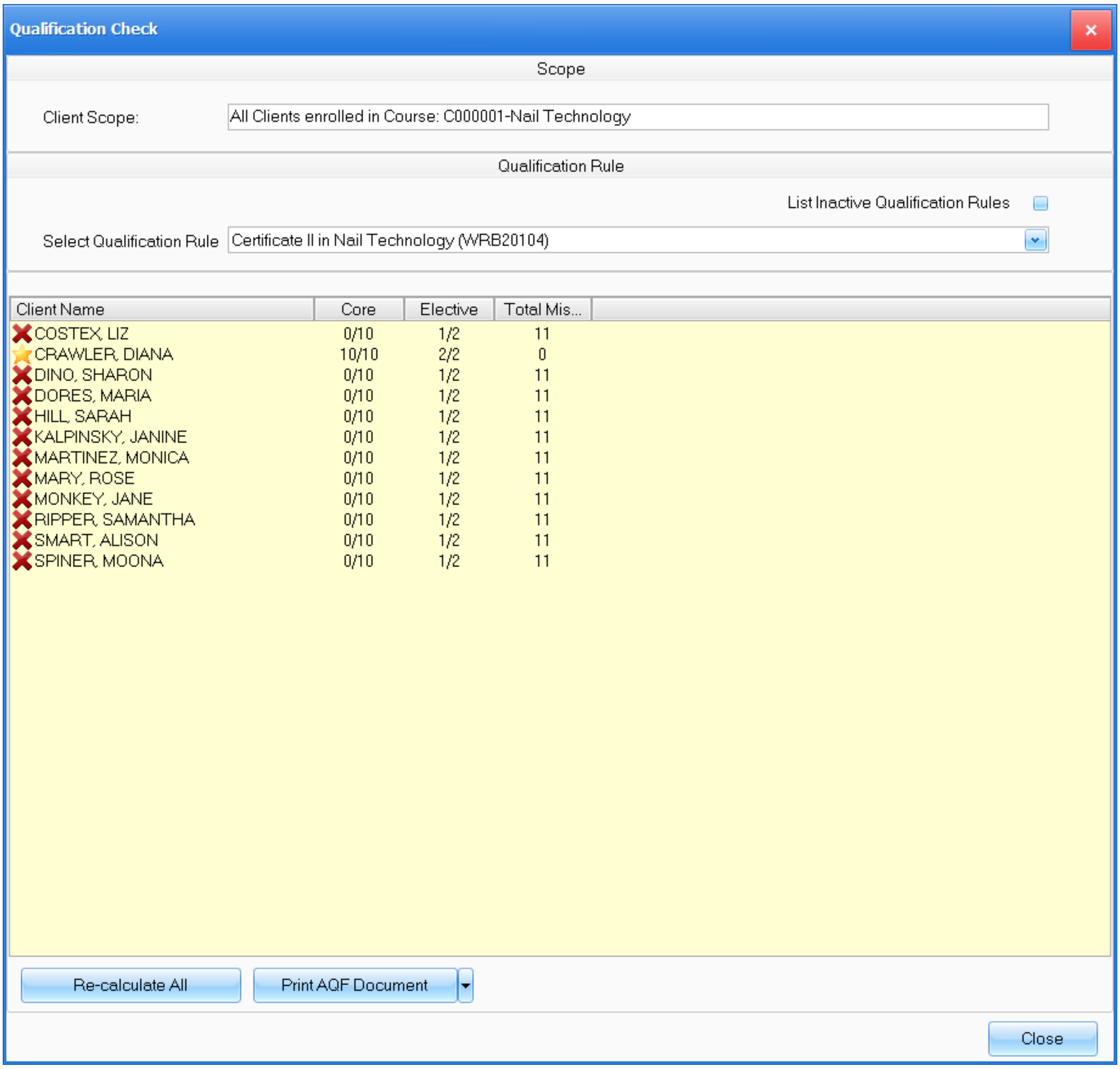
To print Certificates and Statements of Attainment you need to conduct a **qualification check**. This checks if the clients have completed the units required for a Qualification (e.g. "Diploma of Business"). The units required are specified in Qualification rules area of the system which is beyond the scope of this document.

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



■ **Figure above - Checking 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):



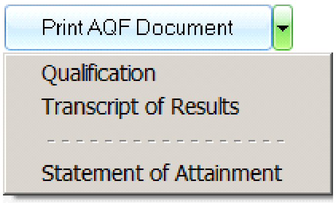
- **Figure above – Qualification check for a group of students**

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.

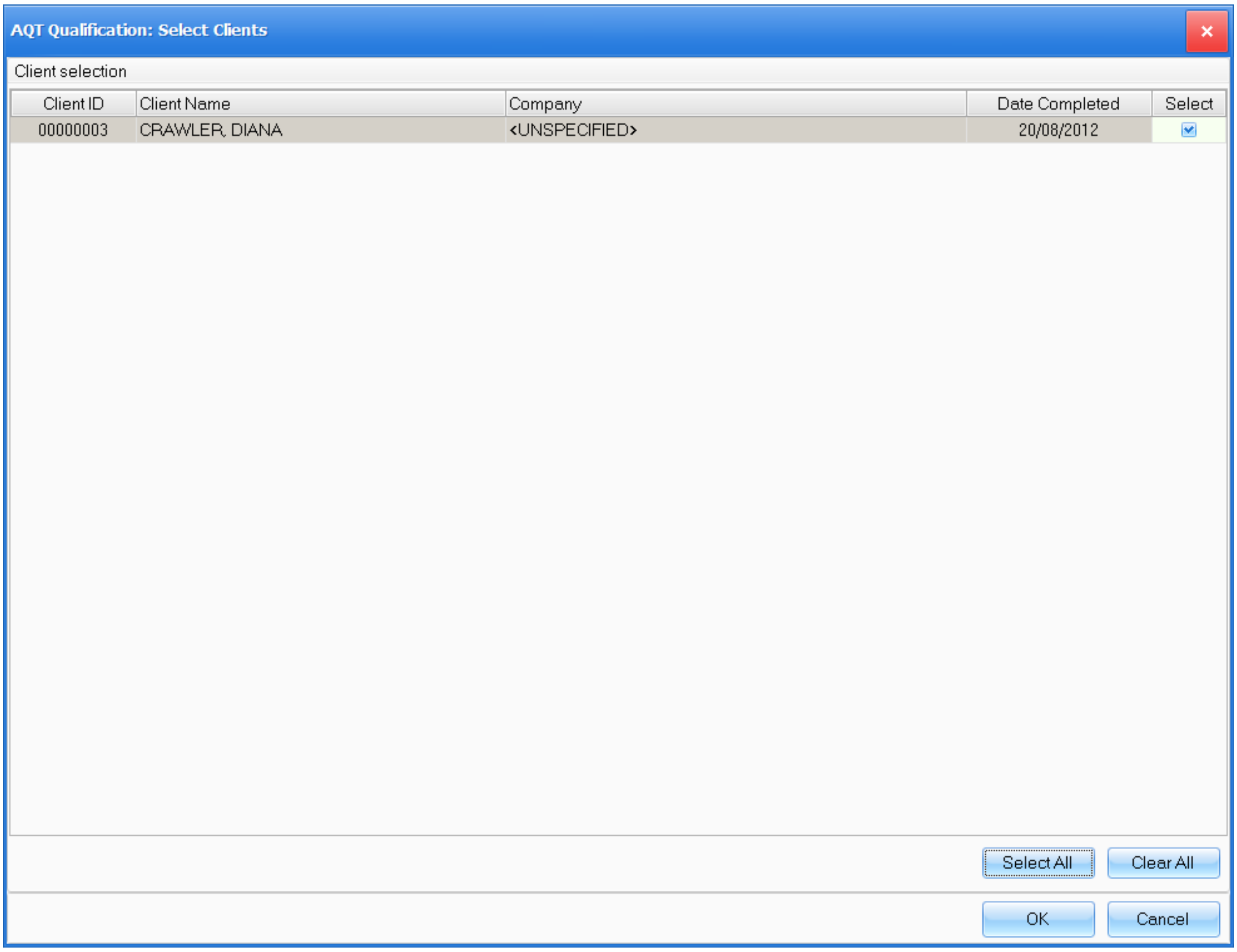
- **Table above –Qualification check symbols**

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 – Printing AQF Documents**

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 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 to the Client record in PowerPro:

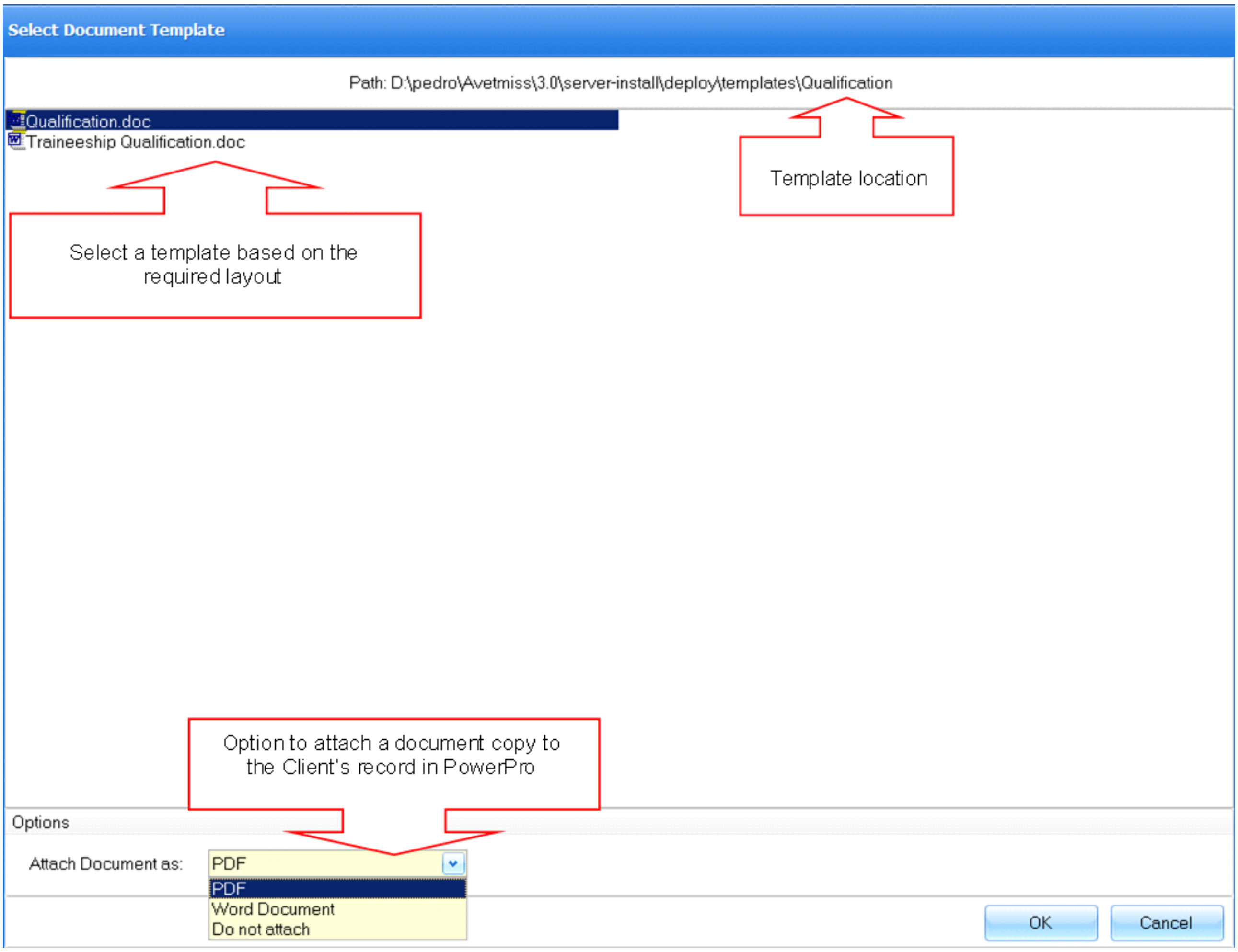


Figure above – User options when printing certificates

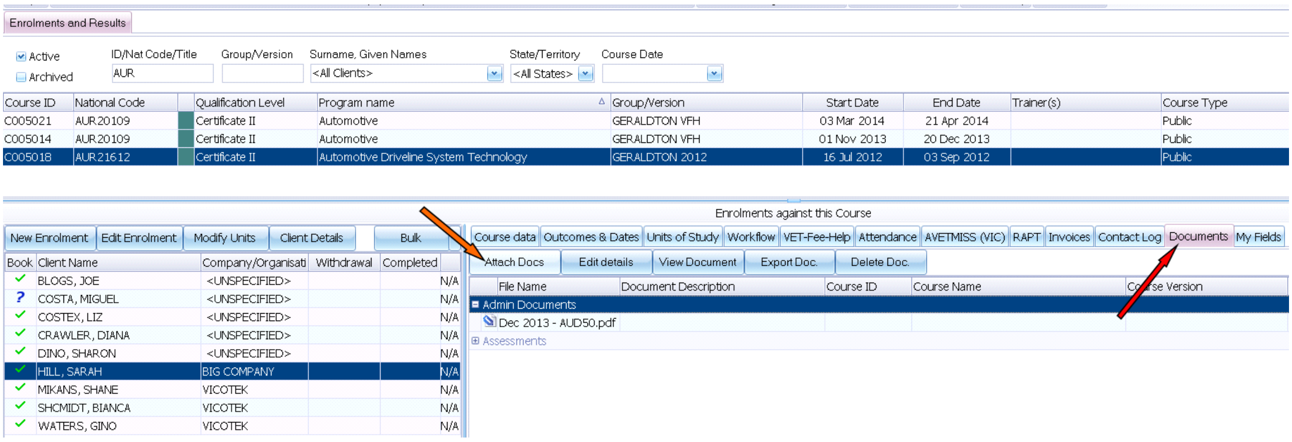
Finally press **OK** to generate the Certificate(s) as per Client selection and user options.

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.

3.6. Attaching documents to a client/enrolment

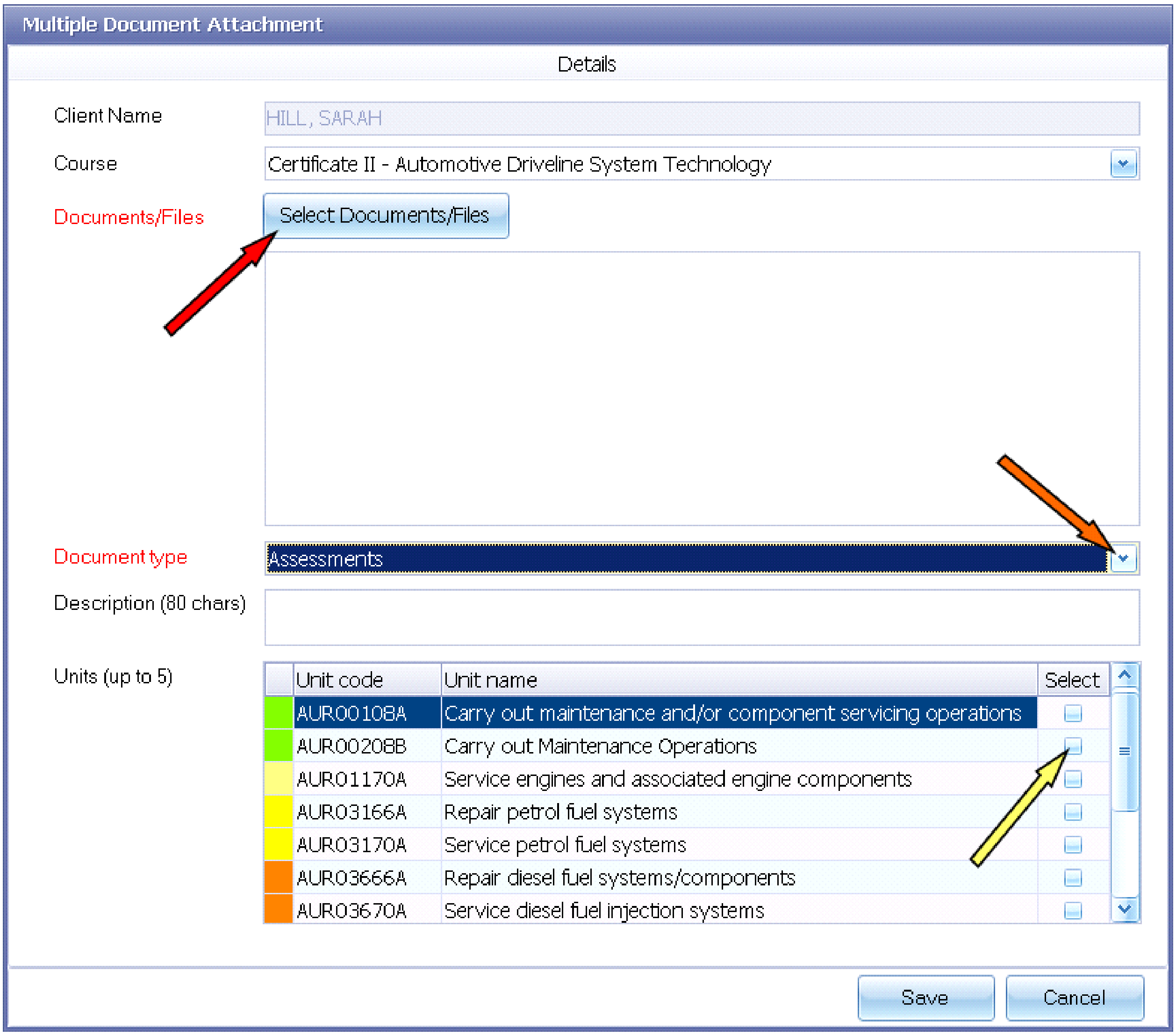
PowerPro RTO allows for document uploading. These documents are stored within the database and are linked to the client or to the client enrolment.

To attach documents against a student enrolment please do as follows:



■ **Figure above – Attaching documents to a Client enrolment**

1. Highlight the relevant client (*Hill, Sarah* in the example above).
2. Open the **Documents** tab.
3. Press the **Attach Docs** button (or drag and drop files from windows explorer).
4. The **Multiple Document Attachment** window comes up:



■ **Figure above – Options when attaching documents to a Client enrolment**

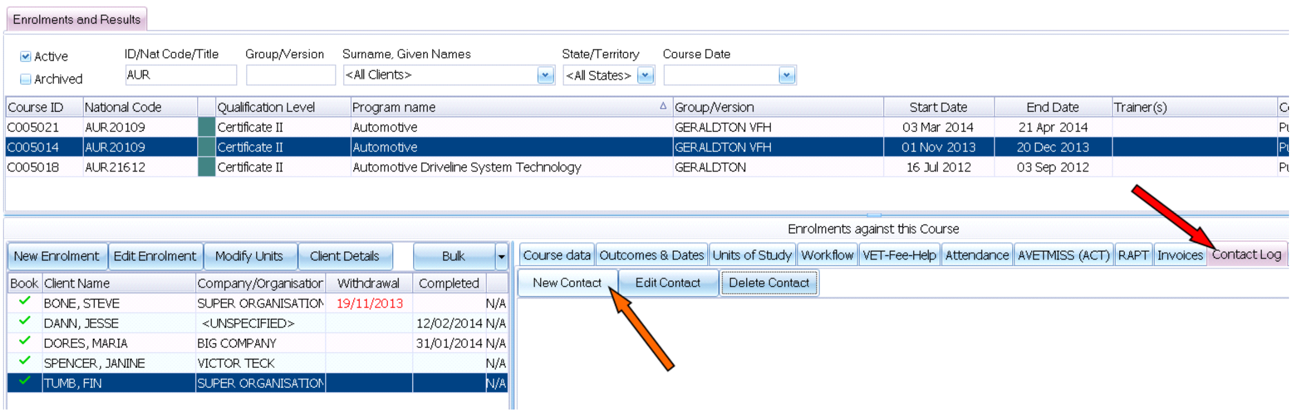
5. Click on **Select Documents/Files** to choose the document(s) to attach (if you have not done that via drag & drop).
6. Select an entry from the **Document Type** list to categorise the document(s).
7. Enter an optional description of the document(s) being attached.
8. If the document(s) relate to particular unit(s), check the appropriate boxes on the **Select** column.
9. Press **Save** to attach the document(s).

Note: It's a good principle not to attach large documents/files as the database will grow large fairly quickly. Please check your scanner resolution and drop it so that any scanned document is reasonably small. As a rule of thumb, a one page PDF scanned document should be no more than 400kb in size.

3.7. Creating a Contact Log against a client/enrolment

The **Contact Log** is a multi-purpose student related event register. This can be used to record and track any event related to the student. Some examples are:

- Student absentee
- Email or SMS sent to student
- Phone call
- Assessment
- Complaint
- WSE/OH&S incident



■ **Figure above – Creating a Contact Log record against a Client enrolment**

To create a Contact Log against a client, please do as follows:

1. Highlight the relevant client (*Tumb, Fin* in the example above).
2. Open the **Contact Log** tab.
3. Press the **New Contact** button.
4. The **Contact Log** window comes up:

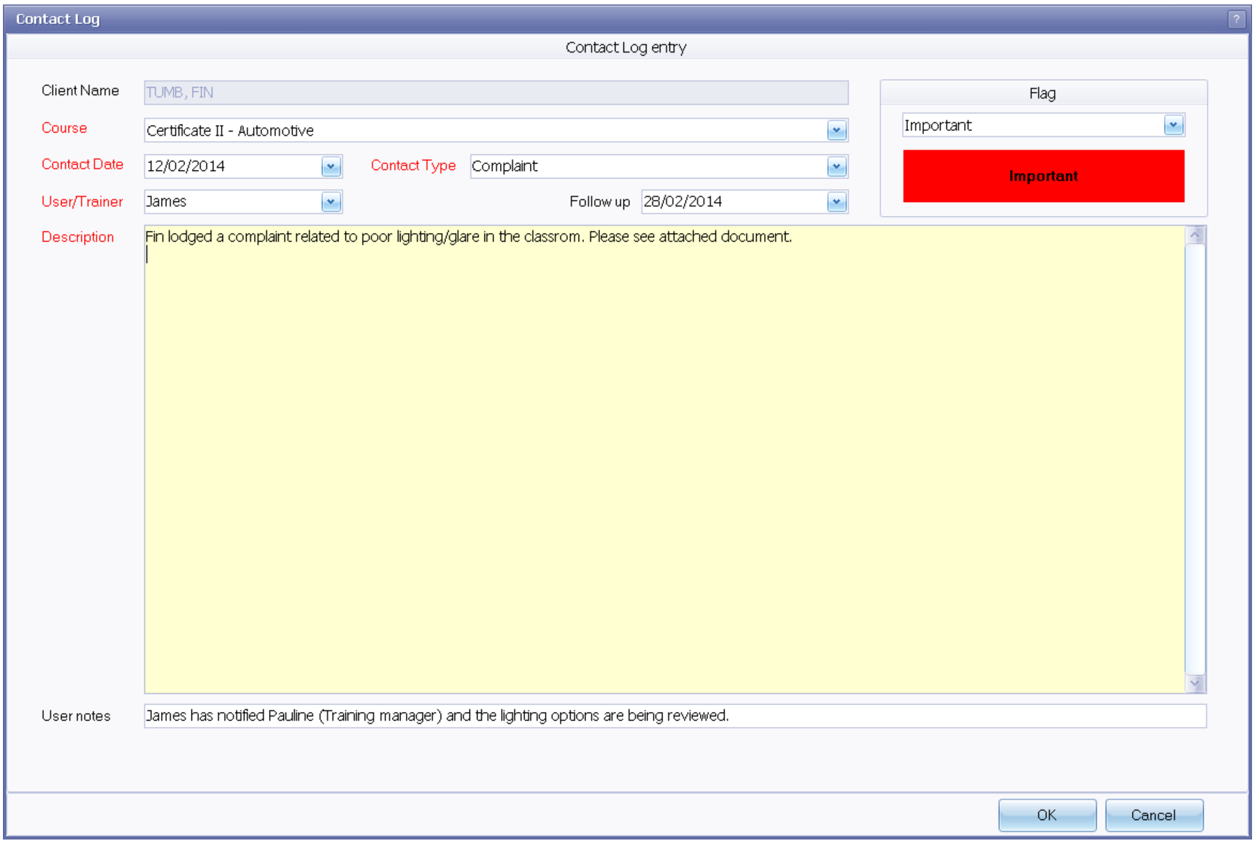


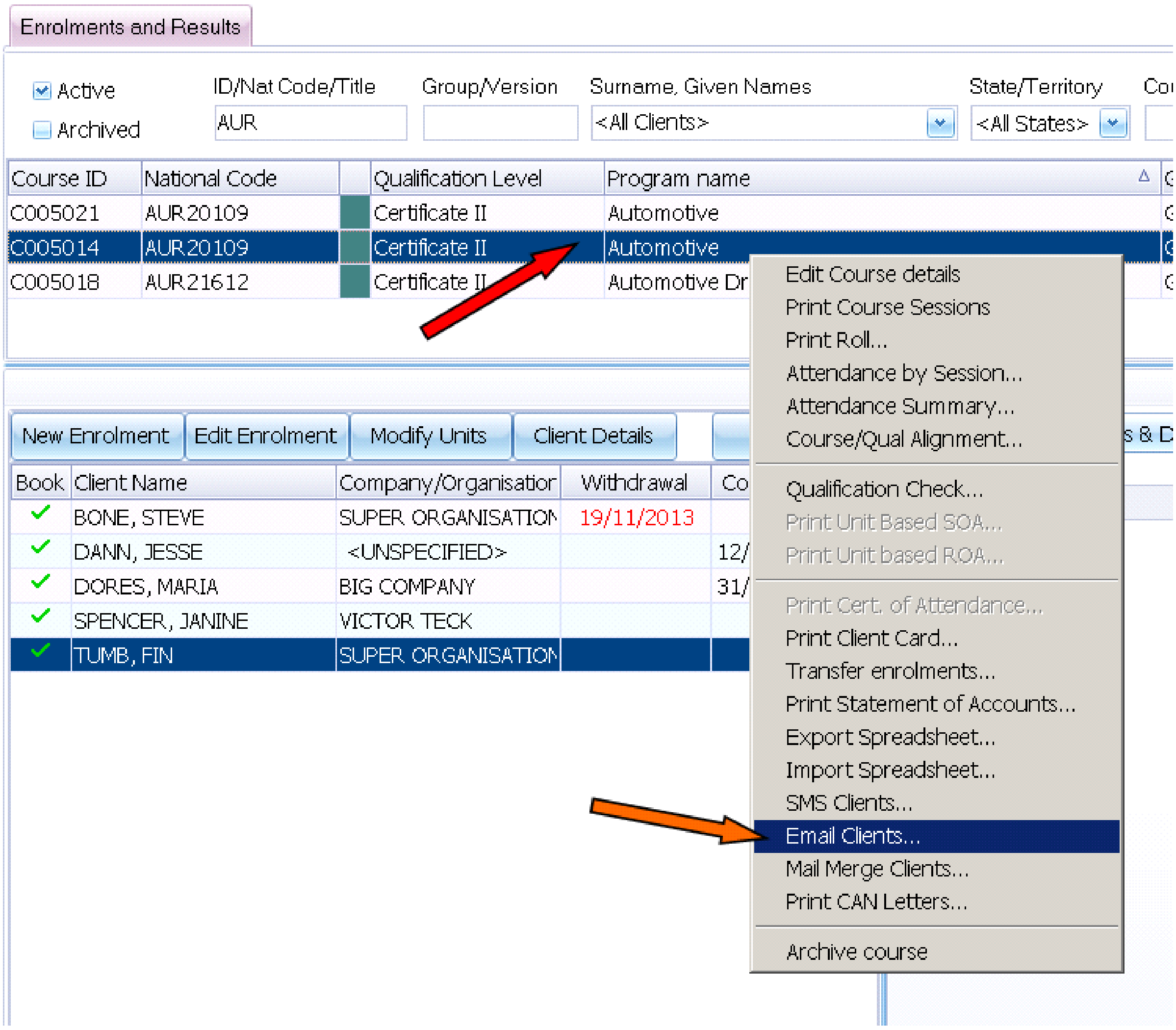
Figure above – Creating a Contact Log for a student complaint

5. Fill in the mandatory fields.
6. Optionally enter a **Follow up** date.
7. Optionally select a colour/context **Flag**.
8. Optionally enter any trainer or admin notes under **User notes**.
9. Press **OK** to save the Contact Log record.

Note: A built-in report exists on the Contact Log. Information entered in this area can easily be extracted on that report.

3.8. Emailing a client or a group of clients

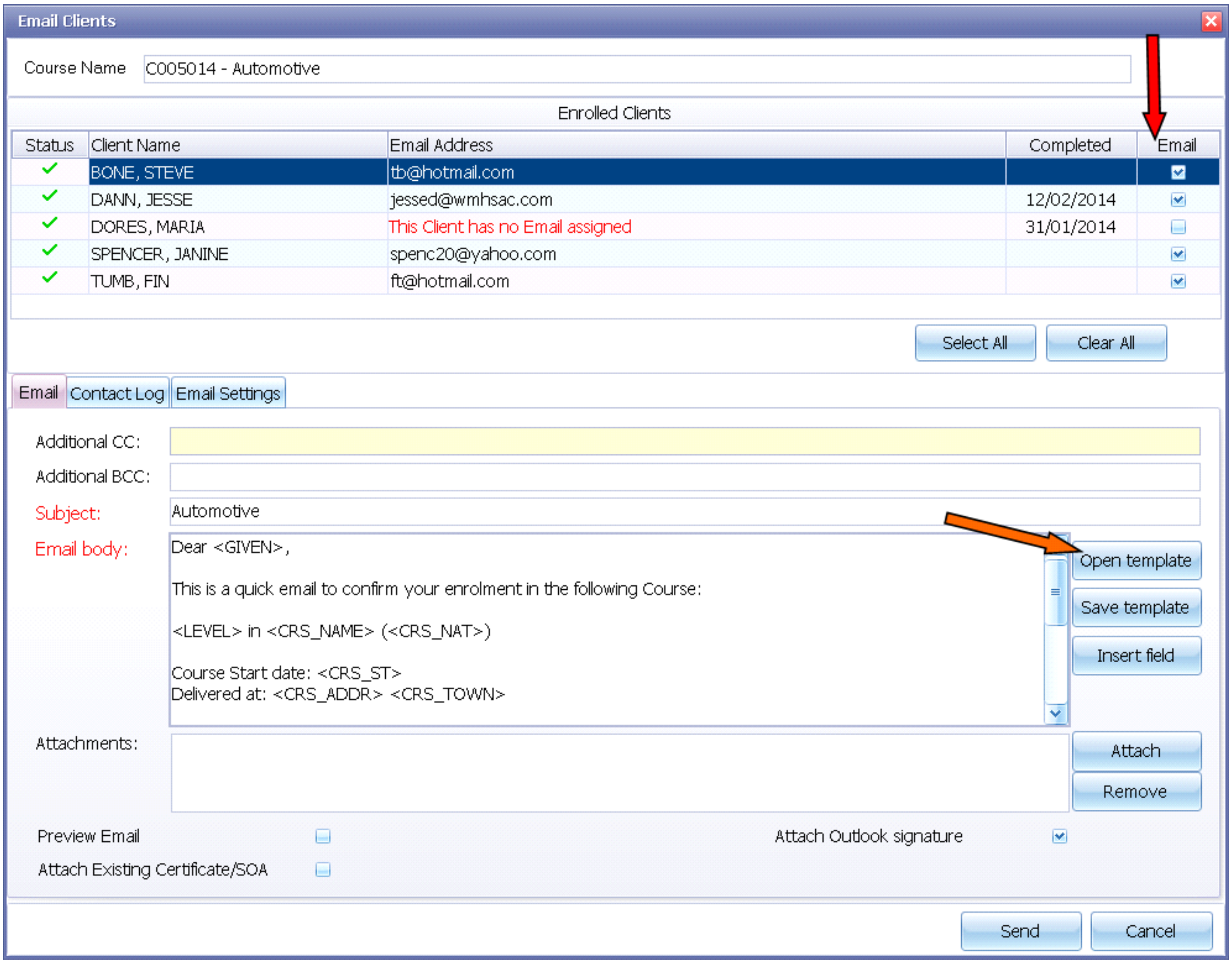
PowerPro allows emailing course participants individually or in bulk. The advantage of doing it from PowerPro is that you can keep a record that the email was sent (as well as the content of the email) as a Contact Log. The other great advantage is the use of Email templates.



■ **Figure above – Emailing a group of clients**

To email a group of students please do as follows:

1. Right-click on the relevant Course/Group (Course number *5014* in the example above).
2. Select the **Email Clients…** item from the pop-up menu.
3. The **Email Clients** window comes up:



■ **Figure above – Composing the email**

4. Check the **Email** boxes for the relevant recipients.
5. Optionally click on **Open template** to use an email template.
6. Adjust the **Email body** if required.
7. Optionally attach any documents/files using the **Attach** button.
8. Open the **Contact Log** tab to enable/disable logging of the email(s) being sent.
9. Press **Send** to send the email message(s).