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-today 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

Welcome to PowerP	ro RTO Training Management System - Version 3.0.1012.17
•••	ρουειριο ττο - τως
Username Password	TEEGAN
Database server	localhost
Database filename	C:\Program Files\Firebird\RTOV3.fdb
Users/License	es information OK Cancel

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.

# 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:

🐉 Powerl	Pro RTO 3	.0.1012.17 (s	ample datab	ase)											
Home	Reports	5 Tools	Configuratio	n Help											
-	-		-	-	2	<u></u>	-	<b>E</b>		1				۱	
Close Exit	Clients	Enrolments and Results	Accredited Courses	Non Accredited Courses	Training Plans	Client Companies	Trainers Assessors	Trainer Scheduler	Invoices Payments	Qualification Rules	AQTF Check	Generate AVETMISS Files	Generate RAPT Files	Bookmarks ~	
Escape				Data B	Entry (F1 - F	=9)				AQTE		AVETMISS	/RAPT	Links	

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.



# 3.1. 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.

Image: Description of the Accedent of the Acced	* Poweri Home					n (3.0.1001.1	9) - Demo י	version - [En	olments and Resi	ılts]					
Bits		Mepurts								•_ =					
Dr. Correge       Correge <td></td> <td>20</td> <td></td> <td>-</td> <td></td> <td></td> <td><b>D</b> (</td> <td>•</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>		20		-			<b>D</b> (	•							
Notice Code         Code Display Code of Code         Code Code Code Code Code Code Code Code	Exit	Clients			Co	irses Comp	Trans Letter			Qualification AQ1	F Generate	Generate			
Barbone Landerson       Code       Name Patient       Concept/oppation       Product					Data E	ntry (Escape - F8	Enrol Clie	nts in a Cour	ie						-
Work Or Arbitive Pattern Markel (D. Ala Code/Tele       Wirk Fredering Data Code/Tele       Wirk Fredering Data Code/Tele       Wirk Fredering Data Code/Tele       Select clients to enrol from client list         Codow 0       National Code/Tele       Fredering Data Code/Tele       Fredering Data Code/Tele       Select clients to enrol from client list         Codow 0       National Code/Tele       Fredering Data Code/Tele       Fredering Data Code/Tele       Select clients to enrol from client list         Codow 0       Trakation 0       Code/Tele       Fredering Data Code/Tele       Select Clients to enrol from client list         Codow 0       Trakation 0       Code/Tele       Fredering Data Code/Tele       Select Clients to enrol from client list         Codow 0       Trakation 0       Code/Tele       Fredering Data Code/Tele       Select Clients to enrol from client list         Codow 0       Trakation 0       Code/Tele       Fredering Data Code/Tele       Select Clients to enrol from client list         Codow 0       Trakation 0       Code/Tele       Fredering Data Code/Tele       Select Clients to enrol from client list         New Enrol. Lutton to opper       Tele Data Code/Tele Use/Tele SoleCode/Tele Use/Tele Code/Tele Use/Tele SoleCode/Tele Use/Tele SoleCode/Tele Use/Tele	Enrolment	s and Resu	ults				0.1					st			
Balance         Plane galach (D) Ald Cod/Tells         Code         Garantee         Generation         Description         Code         Garantee         Generation         Garantee         Generation         Garantee         Generation         Garantee         Generation         Garantee         Gar							Lode	Name F	attern					Find	
Contract Div       Material Code       Galance Code       Galance Code       Galance Code       Select Clients to enrol from clients clients clients to enrol from clients clients to enrol	Active	Archiv	ve Path	ern <u>M</u> atch (ID/N	lat Code	Title):	<u> </u>				11				l .
COUCCOUND         ESSEDID         Determine         Concent         Sessen         Concent         Sessen         Concent	Course ID		National Co	de		Qualification Lev									Select clients to enrol from
000005       ILTRADIG       A Course 0000005       INCOUCTION Watchinger Decima       INCOURT Watchinger Decima       Incourse	C000007		BSB51004			Diploma									
D000000       NUCUCIION       Workings/Shot       00000004       Surfinity       BEESTORIA       Decomposition       Expension       PERLANTLE       PERLANTLE<	C000006		HLTFA3018	3		A Course									client list
CO00002 TAA40104 Celficer V   C000001 BSB51004   Delons MIRANT   0000007 ACKSON   0000007 ACKSON   0000007 ACKSON   0000007 ACKSON   0000007 ACKSON   0000007 MANDA   0000007 ACKSON   0000007 ACKSON <td></td> <td></td> <td></td> <td>4</td> <td></td>				4											
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New enrol Celer Detail     New enrol Celer Detail     New enrol Celer Detail     Common MANAPAM        New enrol Celer Detail        Celer Detail <td< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>т</td><td></td><td></td><td></td></td<>												т			
New enrol Cde Enrolment   Deter Enrol Clerk Detail   Occording Rink   AMANDA UNEPECT ENSINES SOUT   UNE enrol Clerk Detail   Occording Rink   New Enrol Clerk Detail   Continu Clerk details for existing Clerk Enrol Selected Clerks   Continu Clerk details for existing Clerk Enrol Selected Clerks   Continu Clerk details for existing Clerk Enrol Selected Clerks   Continu Clerk details for existing Clerks Enrol Selected Clerks   Screen Surame   Object Film/ Compound/Spintation Onionion   Detail Streame   Outpect Film/ Compound/Spintation Onionion   Screen Surame   Clerk details of existing Clerks   Enrolmerk Date Strik   Enrolmerk Date Strik   Clerk details of existing Clerks   Enrolmerk Date Strik															
New enrol Edd Ernolment     New Enrol. button to open Enrol clients in a course screen     Screen     Code     Standame     Given Names     Date of Bithly     Content Clients     Clients to be enrol led in the selected course     Clients to be enrol led in the selected course     Clients         <							00000009	MARKHEM	KEN	E C	DIRECT BUSINESS SOLU	т			
New enrol Edst Enrolment     Debet Enrol     Clefren Delatic     Confine Cl							00000010	RINE	AMANDA	[	DIRECT BUSINESS SOLU	т			
New Enrol. button to open Enrol clients in a course screen       Cordm Client data for existing Clients       Enrol Selected Clients       Coadon         Date of Bitth Company/opprisation Success       Date of Bitth Company/opprisation Date of Bitth Company/opprisation Stream       Drivition       Department       Location       Clients to be enrol led in the selected course         Remove floor endoted bitth       Enrolment Options       Remove floor endoted bitth       Enrolment Options       Enrolment Options         Enrolment Options       Enrolment Options       Enrolment Options       Date of Bitth Company       Enrolment Options		_					00000011	JERRARD	PAUL		(UNSPECIFIED)				
New Enrol. button to open Enrol clients in a course screen Clients in a course Code Sumane Given Name: Date of Bith Company/organisation Division Department Location Clients to be enrol led in the selected course	New en	rol Ec	dit Enrolmen	Delete Enn	ol CI	ent Details	00000012	DIANA	CRAWLER	16 Nov 1972	<unspecified></unspecified>				1
New Enrol. button to open Enrol clients in a course screen						kawal	📃 Confir	m Client details fo	existing Clients				Enrol S	elected Clients Create New Client	
Screen Clients to be enrolled in the selected course Clients to be enrolled to be enrolled in the selected course Clients to be enrolled to be enrolle	Nev	v Enro	ol. but	tton to d	open						Clients to be	molled		, ( , , , , , , , , , , , , , , , , , ,	-
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Remove from endowert latt       Endowert Options       Endowert Options       DK	sere	on													Clients to be enrolled in the
Remove from envoluent fat Envolment Dale 31/05/2010  Refreshment OK Cancel	SULE	en													selected course
Envolment Date 31/05/2010 Refreshment Cotons															selected course
Errolment Options Errolment Options OK Cancel															· [
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Entodnierk Dale 31/05/2010 Refreshment Cancel														Remove from enrolment list	
Entodnierk Dale 31/05/2010 Refreshment Cancel											Enrolment O	ptions			
DK Cancel							Enclosed	Date 31/05	2010	Refresh					
							Lindendry		2010					OK Cancel	-
														Calcer	
	1														
3.0.1001.19 - DEMO RTOADM READ/WRITE Courses: 5 Active: 5 Last batch: 2008/2009 10:35	3.0.1001.1	9 - DEMO	RTG	ADM	READ/	WRITE	Courses: 5	Activ	e: 5 Last bat	ch: 20/08/2009 10:35	1				

#### 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:

		Course	
C000002	Train	ing and Assessment	
elect Unit Code		Unit Name	
Client : DIANA,	CRAWLER		
🕑 BSBAUD4	-02A	Participate in a quality audit	
BSBCMN4	104A	Develop teams and individuals	
🕑 BSBCMN4	105A	Analyse and present research information	
BSBCMN4	A204	Promote products and services	
🕑 BSBMKG4	106A	Build client relationships	
M TAADEL4	02A	Facilitate group-based learning	
📃 TAADEL4	05A	Coordinate and facilitate distance-based learning	
E TAAENV4	04A	Develop innovative ideas at work	
TAALLN4	D1A	Address language, literacy and numeracy issues within learning and assessment practice	
E TAATAS4	01A	Maintain information requirements of training and/or assessment organisations	

#### 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:

New Client							
Save	Cancel						
Main Other contacts	AVETMISS Vet Fe	e-Help Previo	us Employers				
Code/ID			Secondary ID				
Sumame			Title	×			
Given names							No Photo
Preferred name							assigned
Building name							
Flat/Unit details							
Street/Lot No.		Street name			Custom field		Client Photo
Suburb/Town				💌 Postcode Lookup	Balance	\$0.00	
Postcode	State	WA		-			
Company	<unspecified></unspecified>				Notes		
Division	<unspecified></unspecified>						A
Department	<unspecified></unspecified>						
Location	<unspecified></unspecified>						
Occupation	<unspecified></unspecified>						
Date of Birth		~	G	iender 💽			
Phone: Home	$\bigcirc$	Work ()	M	obile			
Fax	$\bigcirc$	Email					~

#### 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.

Company	<unspecified></unspecified>		Add new company button
Division	<unspecified></unspecified>		
Department	DIRECT BUSINESS SOLUTIONS		
Location	MANAGEMENT SOLUTIONS	ă	
	OUTDOORSHOTS		
Occupation	THE STEPPING RDOS		
Company dropdown list			

Figure above - Assigning a company to a client

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

New Client					
Save <u>C</u> an	cel				
Main Other contacts AVETM	IISS Vet Fee-Help Previous Emplo	yers			
Postal Address			Usual Residencial Add	ress (Used for AVETMISS 7 reporting	)
Care of		Same as main			Same as main
Building name			Building name		
Flat/Unit details			Flat/Unit details		
Street/Lot No.	Street name		Street/Lot No.	Street name	
PO BOX					
Suburb/Town			Suburb/Town		
Postcode	State	~	Postcode	State	<b>~</b>
Country		<b>*</b>			
Emergency Contacts			l		
Contact name			Overseas Contact		
Relationship			Relationship		
Phone			Overseas Phone		
Email			Overseas Email		

Figure above – Other contacts tab

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

Save <u>C</u> ancel		
n Other contacts AVETMISS Vet	ee-Help Previous Employers	
Gender	Unique Student Id (USI)	WA Specific Fields
Country of birth	Australia	Education Identifier
Language other than English at hom		English is main Lang. 🕑
Proficiency in English		Region
Indigenous status		Remoteness
Disability	NO DISABILITY	
Highest school level completed		
Year higher school level completed	Currently at school 📃	QLD Specific Fields
Prior qualifications		Learner Unique ID
Prior Education achievement flag	NO	VIC Charifa Fields
Employment category/status		VIC Specific Fields
Study reason		Vic Student No
		New to the Victorian Education System
Centrelink Number (CRN)		
Job Seeker Number		

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:

New	Enrolment Edit Enrolment	10dify Units Client	Details	Bulk Course data Outcome
Book	Client Name BONE, STEVE	Company/Organisati SUPER ORGANISATIO		<ul> <li>Resulting &amp; Dates - by Client</li> <li>Resulting &amp; Dates - by Unit/Module</li> </ul>
× × ×	DANN, JESSE DORES, MARIA SPENCER, JANINE	<unspecified> BIG COMPANY VICTOR TECK</unspecified>		Add Optional Units Contact Log Funding Source
~	TUMB, FIN	SUPER ORGANISATIO		Tuition Fees RAPT Export flag
				Invoicing My Fields

Figure above – Bulk resulting by Client

The **Bulk resulting** screen will appear:

	e BONE,	STEVE		Client ID 20131962	Next Client
		Unit/Module list fo	this Client		
: Code		Unit/Module Name Trainer	Start	Current Outcome/Result	Out. Date
AUROO	0108A	Carry out maintenance and/or component se	01/11/2013	Competent	22/11/201
AUROO	)208B	Carry out Maintenance Operations	01/11/2013		
AUR01	1170A	Service engines and associated engine compo	01/11/2013	Competent	22/11/201
AUR03	8166A	Repair petrol fuel systems	01/11/2013	Competent	22/11/201
AUR03	3170A	Service petrol fuel systems	01/11/2013	Competent	22/11/20:
AUR03	3666A	Repair diesel fuel systems/components	01/11/2013		
AUR03	3670A	Service diesel fuel injection systems	01/11/2013		
AUR05	5166A	Repair exhaust systems	01/11/2013		
AUR06	6454	Overhaul transmissions (manual)			
//0//00	10 10n	overhadi dansmissions (mandal)	01/11/2013		
AUR06		Repair transmissions (manual)	01/11/2013		
		· · · · ·			
AURO6	Select N	Repair transmissions (manual)			
AURO6	Select N	Repair transmissions (manual)			

- 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:

								Enrolments against this Course	
New	Enrolment	Edit Enrolment	Modify Units	Client Details	Bulk	-	Course data Outcomes & Date	S Units of Study Workflow VET-Fee-Help Attendance AVETMIS	SS (ACT)
Book	Client Name		mpar	dify Optional Units for	selected Client		Dutcomes 💽 🚺		
1	BONE, STE	/E	SUPER ORG.	ANISATIC 19/11/201	3 N,	Ά	Code	Unit/Module Name	M/O
1	DANN, JESS	SE 🖌	<unspecif< td=""><td>IED&gt;</td><td>12/02/2014N/</td><td>'A</td><td>AUR00108A</td><td>Carry out maintenance and/or component servicing operations</td><td>•</td></unspecif<>	IED>	12/02/2014N/	'A	AUR00108A	Carry out maintenance and/or component servicing operations	•
1	DORES, MA	RIA	BIG COMPAN	4Y	31/01/2014N/	'A	AUR00208B	Carry out Maintenance Operations	•
$\sim$	SPENCER, 3	JANINE 🗸	VICTOR TEC	CK	N,	'A	AUR01170A	Service engines and associated engine components	•
1	TUMB, FIN		SUPER ORG	ANISATI	N,	Ά	AUR03166A	Repair petrol fuel systems	•
							AUR03170A	Service petrol fuel systems	•
							AUR03666A	Repair diesel fuel systems/components	•
							AUR03670A	Service diesel fuel injection systems	•
							AUR05166A	Repair exhaust systems	•
							AUR06645A	Overhaul transmissions (manual)	•
						-	AUR06666A	Repair transmissions (manual)	•

#### 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:

Select Optional Units	
	Course
C005014 AU	utomotive
Select Unit Code	Unit Name
□ Client: SPENCER, JANINE	
AUR05166A	Repair exhaust systems
MUR06645A	Overhaul transmissions (manual)
AUR06666A	Repair transmissions (manual)
Check All Check Non	e Done

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.

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:

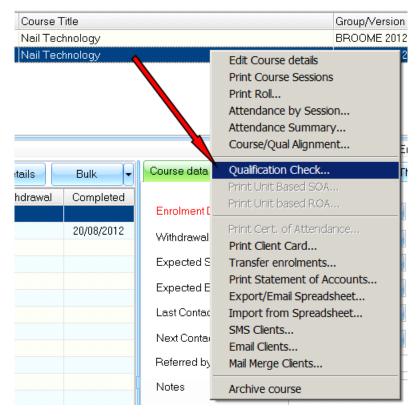


Figure above - Checking course participants against a qualification rule

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):

Qualification Check								
				Scope				
Client Scope:	All Clients e	nrolled in Co	urse: C0000	01-Nail Techn	iology			
				Qualification	Rule			
						List Inactive Q	ualification Rule	s 📃
Select Qualification Rule	Certificate II	in Nail Tech	inology (WR	B20104)				*
			55 (	,				
Olie web le wee		0		T-1-146-				
Client Name COSTEX, LIZ		Core 0/10	Elective 1/2	Total Mis 11		 		
CRAWLER, DIANA		10/10	2/2	0				
DINO, SHARON		0/10	1/2	11				
CORES, MARIA		0/10	1/2	11				
KHILL, 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				
KMONKEY, JANE KRIPPER, SAMANTHA		0/10 0/10	1/2 1/2	11 11				
SMART, ALISON		0/10	1/2	11				
SPINER, MOONA		0/10	1/2	11				
		-1	.,=					
Re-calculate All	Print	AQF Docum	nent 🗸 🗸					
								Close
								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 <b>Certificate and a Transcript of Results</b> for this Qualification.
×	Qualification not completed	Client is eligible for a <b>Statement of Attainment</b> 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:

ent selectior	1			_
Client ID	Client Name	Company	Date Completed	Sele
00000003	CRAWLER, DIANA	<ul><li>UNSPECIFIED&gt;</li></ul>	20/08/2012	×
			Select All	lear All
			ОК	Cancel

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:

Select Document Template	
Path: D:\pedro\Avetmiss\3.0\server-install\deploy	Atemplates\Qualification
■ Qualification.doc Traineeship Qualification.doc       Select a template based on the required layout	Template location
Option to attach a document copy to the Client's record in PowerPro	
Options	
Attach Document as: PDF  PDF	
Word Document Do not attach	OK Cancel

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:

Enrolments	and Results											
Active	ID/Nat Code/T	itle Group/Ver	sion Surname, Giv	ven Names	State/Ten	itory Course Dat	ite					
🔲 Archive	ed AUR		<all clients=""></all>		<all state<="" th=""><th>es&gt; 💌</th><th><b>*</b></th><th></th><th></th><th></th><th></th><th></th></all>	es> 💌	<b>*</b>					
Course ID	National Code	Qualification Le	el Program n	ame		△ Group/V	/ersion		Start Date	End Date	Trainer(s)	Course Type
005021	AUR 20109	Certificate II	Automotiv	e		GER ALD	TON VFH	0	3 Mar 2014	21 Apr 2014		Public
005014	AUR 20109	Certificate II	Automotiv	e		GERALD	TON VFH	0	1 Nov 2013	20 Dec 2013		Public
005018	AUR 21612	Certificate II	Automotiv	e Driveline System	Technology	GERALD'	TON 2012	1	6 Jul 2012	03 Sep 2012		Public
Jew Enroln	ment Edit Enrolment	Modify Linits	Client Details	Bulk	Course data Ou	tromes & Dates		nents against thi			) RAPT Invoices (	Contact Log Doguments My Fie
-	ment Edit Enrolment	Modify Units	Client Details	Bulk	2	r r	Inits of Study Wo	rkflow VET-Fee-	Help Attendan		.) RAPT Invoices C	Contact Log Documents My Fiel
Book Client	t Name	Company/Org	anisati Withdrawal	Completed	Course data Ou Attach Docs	r r					) RAPT Invoices C	Contact Log Documents My Fiel
Sook Client	t Name SS, JOE	Company/Org <unspecifie< td=""><td>anisati Withdrawal D&gt;</td><td>Completed N/A</td><td>2</td><td>Edit details</td><td>Inits of Study Wo</td><td>rkflow VET-Fee- Export Doc.</td><td>Help Attendan</td><td></td><td>) RAPT Invoices C</td><td>Contact Log Documents My Fiel</td></unspecifie<>	anisati Withdrawal D>	Completed N/A	2	Edit details	Inits of Study Wo	rkflow VET-Fee- Export Doc.	Help Attendan		) RAPT Invoices C	Contact Log Documents My Fiel
300k Client ✓ BLOG ? COST	t Name GS, JOE FA, MIGUEL	Company/Ord <unspecifie <unspecifie< td=""><td>anisati Withdrawal D&gt; D&gt;</td><td>Completed N/A N/A</td><td>Attach Docs File Name</td><td>Edit details Docum</td><td>Inits of Study Wo</td><td>rkflow VET-Fee- Export Doc.</td><td>Help Attendan Delete Doc</td><td></td><td>) RAPT Invoices C</td><td></td></unspecifie<></unspecifie 	anisati Withdrawal D> D>	Completed N/A N/A	Attach Docs File Name	Edit details Docum	Inits of Study Wo	rkflow VET-Fee- Export Doc.	Help Attendan Delete Doc		) RAPT Invoices C	
300k Client BLOG COST COST	t Name SS, JOE FA, MIGUEL FEX, LIZ	Company/Ord <unspecifie <unspecifie <unspecifie< td=""><td>anisati Withdrawal D&gt; D&gt; D&gt;</td><td>Completed N/A N/A N/A</td><td>Attach Docs File Name Admin Docume</td><td>Edit details Docum</td><td>Inits of Study Wo</td><td>rkflow VET-Fee- Export Doc.</td><td>Help Attendan Delete Doc</td><td></td><td>C) RAPT Invoices C</td><td></td></unspecifie<></unspecifie </unspecifie 	anisati Withdrawal D> D> D>	Completed N/A N/A N/A	Attach Docs File Name Admin Docume	Edit details Docum	Inits of Study Wo	rkflow VET-Fee- Export Doc.	Help Attendan Delete Doc		C) RAPT Invoices C	
Client BLOG COST COST	I: Name SS, JOE FA, MIGUEL FEX, LIZ WLER, DIANA	Company/Ord <unspecifie <unspecifie <unspecifie <unspecifie <unspecifie< td=""><td>anisati Withdrawal D&gt; D&gt; D&gt; D&gt; D&gt;</td><td>Completed N/A N/A N/A N/A</td><td>Attach Docs File Name</td><td>Edit details Docum</td><td>Inits of Study Wo</td><td>rkflow VET-Fee- Export Doc.</td><td>Help Attendan Delete Doc</td><td></td><td>) RAPT Invokces (</td><td></td></unspecifie<></unspecifie </unspecifie </unspecifie </unspecifie 	anisati Withdrawal D> D> D> D> D>	Completed N/A N/A N/A N/A	Attach Docs File Name	Edit details Docum	Inits of Study Wo	rkflow VET-Fee- Export Doc.	Help Attendan Delete Doc		) RAPT Invokces (	
Client BLOG COST COST CRAV	t Name SS, JOE FA, MIGUEL TEX, LIZ MLER, DIANA D, SHARON	Company/Ord <unspecifie <unspecifie <unspecifie <unspecifie <unspecifie< td=""><td>anisati Withdrawal D&gt; D&gt; D&gt; D&gt; D&gt; D&gt;</td><td>Completed N/A N/A N/A N/A N/A</td><td>Attach Docs File Name Admin Docume</td><td>Edit details Docum</td><td>Inits of Study Wo</td><td>rkflow VET-Fee- Export Doc.</td><td>Help Attendan Delete Doc</td><td></td><td>) RAPT Invoices C</td><td></td></unspecifie<></unspecifie </unspecifie </unspecifie </unspecifie 	anisati Withdrawal D> D> D> D> D> D>	Completed N/A N/A N/A N/A N/A	Attach Docs File Name Admin Docume	Edit details Docum	Inits of Study Wo	rkflow VET-Fee- Export Doc.	Help Attendan Delete Doc		) RAPT Invoices C	
Book     Client       ✓     BLOG       ?     COST       ✓     COST       ✓     COST       ✓     CRAVI       ✓     DINO       ✓     HILL,	KName SS, JOE FA, MIGUEL FEX, LIZ MLER, DIANA D, SHARON SARAH	Company/Org <unspecifie <unspecifie <unspecifie <unspecifie <unspecifie BIG COMPANY</unspecifie </unspecifie </unspecifie </unspecifie </unspecifie 	anisati Withdrawal D> D> D> D> D> D>	Completed N/A N/A N/A N/A N/A	Attach Docs File Name Admin Docume	Edit details Docum	Inits of Study Wo	rkflow VET-Fee- Export Doc.	Help Attendan Delete Doc		D) RAPT Invoices C	
Sook Client Sook Client BLOG COST COST CRAVI CRAVI HILL, MIKAN	t Name SS, JOE FA, MIGUEL TEX, LIZ MLER, DIANA D, SHARON	Company/Ord <unspecifie <unspecifie <unspecifie <unspecifie <unspecifie< td=""><td>anisati Withdrawal D&gt; D&gt; D&gt; D&gt; D&gt; D&gt;</td><td>Completed N/A N/A N/A N/A N/A</td><td>Attach Docs File Name Admin Docume</td><td>Edit details Docum</td><td>Inits of Study Wo</td><td>rkflow VET-Fee- Export Doc.</td><td>Help Attendan Delete Doc</td><td></td><td>) RAPT Invokes (</td><td></td></unspecifie<></unspecifie </unspecifie </unspecifie </unspecifie 	anisati Withdrawal D> D> D> D> D> D>	Completed N/A N/A N/A N/A N/A	Attach Docs File Name Admin Docume	Edit details Docum	Inits of Study Wo	rkflow VET-Fee- Export Doc.	Help Attendan Delete Doc		) RAPT Invokes (	

#### 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:

Multiple Document Atta	chment			
		Details		
Client Name	HILL, SARAH			
Course	Certificate II - Aut	omotive Driveline System Technology		*
Course				
Documents/Files	Select Documer	nts/Files		
1	1			
	-			
			<b></b>	
Document type	Assessments			
Description (80 chars)				
Units (up to 5)	Unit code	Unit name	S	Gelect 🔼
	AUROO108A	Carry out maintenance and/or component	servicing operations	
	AUR00208B	Carry out Maintenance Operations		=
	AURO1170A	Service engines and associated engine com	iponents 🏹	
	AURO3166A	Repair petrol fuel systems		
	AURO3170A	Service petrol fuel systems		
	AURO3666A	Repair diesel fuel systems/components	v	
	AURO3670A	Service diesel fuel injection systems		
			Save	ancel

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

📃 Archive	ID/Nat Code/ d AUR	Title Group/Versio	<ul> <li>Sumame, G</li> <li><all clients:<="" li=""> </all></li></ul>			Ferritory Course E tates> 💌	late					
Course ID	National Code	Qualification Level	Program I	name		△ Group.	Version	Start	Date	End Date	Trainer(s)	
005021	AUR 20109	Certificate II	Automotiv	ve		GERAL	DTON VFH	03 Mar	2014	21 Apr 2014		
005014	AUR 20109	Certificate II	Automoti	ve		GERAL	DTON VFH	01 Nov	2013	20 Dec 2013		
005018	AUR21612	Certificate II	Automotiv	ve Driveline System	Technology	GERAL	DTON	16 Jul	2012	03 Sep 2012		
300k Client	nent Edit Enrolment Name	Modify Units C Company/Organisatio	ent Details Withdrawal	Bulk • Completed	New Contac	Ϋ́	Delete Contact	rkflow VET-Fee-Help				
<ul> <li>BONE</li> </ul>	, STEVE	SUPER ORGANISATIO	19/11/2013	N/A			(ئىسىسىسار					
<ul> <li>DANN</li> </ul>	I, JESSE	<unspecified></unspecified>		12/02/2014 N/A								
	ES, MARIA	BIG COMPANY		31/01/2014 N/A								
<ul> <li>DORE</li> </ul>	CER, JANINE	VICTOR TECK		N/A		<b>&gt;</b>						
	OLI () Dra wire											

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:

Contact Log							
			Contact Lo	og entry			
Client Name	TUMB, FIN			Flag			
Course	Certificate II - Automotive				*	Important	•
Contact Date	12/02/2014	Contact Type Com	ıplaint			Important	
User/Trainer	James 💌		Follow up	28/02/2014	*		
Usernotes	Fin lodged a complaint related				t.		
Usernotes	pames has noulied Pauline (16	an in ig manager) and the i	ignung opuoris are c	eing revieweu.			
						OK	Cancel

- 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.

	ctive rchived		ID/Nat Code/ AUR	Title	Group/Ve	ersion	Sumame, ( <all clients<="" th=""><th></th><th></th><th>tate/Territory :All States&gt; 💌</th><th>( ]</th></all>			tate/Territory :All States> 💌	( ]
Cours	e ID	Natior	nal Code	Qu	alification Le	evel	Program	name			Δ
0050	021	AUR 2	0109	Ce	rtificate II		Automot	ive			
0050	)14	AUR 2	0109		rtificate II	5	Automot	ive			
0050	)18	AUR2	1612	Ce	rtificate II		Automot	ive Dr	Edit Course details		
									Print Course Sessions Print Roll		
					-				Attendance by Sessio	a	
									Attendance Summary		
Vew	Enrolme	ent E	Edit Enrolment	: Mo	dify Units	Clier	nt Details		Course/Qual Alignmer		s 8
ook	Client N	lame		Comp	any/Organis	ation	Withdrawal	Co	Qualification Check		
~	BONE, S	STEVE	<u>.</u>				19/11/2013	}	Print Unit Based SOA.		
~	DANN,	JESSE		<uns< td=""><td>PECIFIED&gt;</td><td></td><td></td><td>12/</td><td>Print Unit based ROA.</td><td></td><td></td></uns<>	PECIFIED>			12/	Print Unit based ROA.		
× .	DORES	, MAR	IA	BIG CO	OMPANY			31/	Print Cert, of Attenda		
× .	SPENCE	ER, JA	NINE	VICTO	R TECK				Print Client Card	nce,.,	
<b>~</b>	TUMB, F	FIN		SUPER	R ORGANISA	4OIT/			Transfer enrolments		
									Print Statement of Ac		
									Export Spreadsheet		
									Import Spreadsheet		
									SMS Clients		
									Email Clients		
									Mail Merge Clients		
									Print CAN Letters		
									Archive course		
								_			'

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:

		Enrolled Clients		1
itatus Client Na	ame	Email Address	Completed	Em
BONE, S		b@hotmail.com		
<ul> <li>DANN, 2</li> </ul>		jessed@wmhsac.com	12/02/2014	×
<ul> <li>DORES,</li> </ul>		This Client has no Email assigned	31/01/2014	
<ul> <li>SPENCE</li> </ul>	R, JANINE	spenc20@yahoo.com		
<ul> <li>TUMB, F</li> </ul>	FIN	ft@hotmail.com		
Additional BCC:				
Additional CC:				
Additional BCC:				
Subject:	Automotive			
	Dear <given>,</given>		Open	templat
	Dear <given>,</given>	o confirm your enrolment in the following Course:	=	
-	Dear ≺GIVEN≻, This is a quick email to	o confirm your enrolment in the following Course: IAME> ( <crs_nat>)</crs_nat>	=	templati template
Subject: Email body:	Dear <given>, This is a quick email to <level> in <crs_n< td=""><td>IAME&gt; (<crs_nat>)</crs_nat></td><td>= Save</td><td></td></crs_n<></level></given>	IAME> ( <crs_nat>)</crs_nat>	= Save	
	Dear <given>, This is a quick email to <level> in <crs_n Course Start date: &lt;</crs_n </level></given>	IAME> ( <crs_nat>)</crs_nat>	= Save	template
	Dear <given>, This is a quick email to <level> in <crs_n Course Start date: &lt;</crs_n </level></given>	IAME> ( <crs_nat>) CRS_ST&gt;</crs_nat>	= Save	template
-	Dear <given>, This is a quick email to <level> in <crs_n Course Start date: &lt;</crs_n </level></given>	IAME> ( <crs_nat>) CRS_ST&gt;</crs_nat>	Save	template
Email body:	Dear <given>, This is a quick email to <level> in <crs_n Course Start date: &lt;</crs_n </level></given>	IAME> ( <crs_nat>) CRS_ST&gt;</crs_nat>		template ert field ttach
Email body:	Dear <given>, This is a quick email to <level> in <crs_n Course Start date: &lt;</crs_n </level></given>	IAME> ( <crs_nat>) CRS_ST&gt; ADDR&gt; <crs_town></crs_town></crs_nat>		template ert field

- 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).