

Enquiry **Mate** ^{for} **Trainers**

User Guide

Release 3.10

FIRST STRIKE
SOLUTIONS

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Session 1

(Essentials)

Getting Started

Help System

User Interface

Sales Enquiries

Configuration

1. Getting Started

1.1 What is EMT?

"Enquiry Mate for Trainers enables training organisations to manage sales enquiries, course administration and student records in a professional manner, to provide a high standard of service to their customers and to achieve their business goals."

Enquiry management features include:

- Support for fast and accurate customer identification to avoid duplicate records.
- Handle all aspects of an enquiry on a single form, in any order.
- Keep track of enquiry responses and follow-up actions.
- Manage all stages of the sales process from cold call to repeat customers.
- Automate customer interface and internal work flow by direct email, mailed form letters, phone, on-site visits, etc.

Course administration features include:

- Book tentative or confirmed places for individuals or groups of students.
- Scheduled and ad-hoc course dates & times.
- Manage student payments & payment plans.
- Classroom-based & assessment-based courses.
- Customisable course preparation check-lists.
- Customisable event-based follow-up actions, with customised form-letters.

Student Records features include:

- Manage the certification process, involving assessments and recognition of prior learning.
- Print certificates, statements of attainment, transcripts & certificates of attendance with customised layout directly or via MS-Word.
- Record & analyse attendance.
- Creates AVETMISS reporting files.
- Export invoices and payments to MYOB.

Management features include:

- Record marketing activities and report "conversion" figures by campaign or activity.
- Produce targeted mailing lists, based on past bookings or enquiries.
- Record course evaluation results & comments, with analysis by subject.
- Sales agent performance analysis and commission calculation.
- Regional sales analysis.
- Venue & teacher resource analysis & planning.
- Financial analysis down to the individual offer level.

1.2 Definitions

EMT	Refers to <i>Enquiry Mate for Trainers</i>
Contact	An individual person who may have one or more roles such as customer, student, teacher, etc. It may also store details of anonymous positions such as the sales or service department of a supplier.
Role	<p>A contact may have a number of different roles. In general, whenever a contact is selected in a certain context, they are flagged as having that role in addition to any others they may already have.</p> <p>The roles identified in <i>EMT</i> are:</p> <ul style="list-style-type: none">CustomerStudentSalespersonTeacher/SupervisorAssessorLocation/Site ManagerPublisher
Customer	A contact who organises training for one or more students. A customer may also be a student.
Student	A contact who is registered to participate in an offer .
Teacher	A contact who is assigned to teach an offer . Up to three teachers may be assigned to a classroom offer. One teacher is designated the Supervisor. The other two are supporting teachers.

Assessor	A contact who is assigned to assessment tasks in an assessment program.
Enquiry	A request for information by a contact . Contacts who initiate enquiries are automatically identified as being a customer .
Subject Area	A classification of course content. This is similar to the high level ABS field known as Field of Education used within AVETMISS reporting.
Course	<p>A structured body of work defining how some training is to be delivered. To avoid confusion, we use the word offer to describe the delivery of the course content to a group of students at a given time and place. For example, you might say that you offer several courses, but you would schedule and take bookings for offers, not courses.</p> <p>Courses may consist of one or more modules, and are classified into subject areas. Courses also act as templates for offers, defining the default features of an offer of a course. Many of these features may be customised for a given offer.</p>
Module	A section of a course with defined assessment events. Modules may be associated with one or more competency .
Result	A result may be generated for every student attempting a module (as part of an offer) and contains the results of assessment events and an overall outcome. This outcome also applies to all competencies associated with the module.
Competency	An AQTF unit of competency .
Qualification	A nationally recognised AQTF qualification .
Qualification Attempt	An attempt by a particular student to complete a particular qualification . The competencies required to complete the attempt are initially copied from the qualification, but may be customised for the student (e.g. to select electives). An attempt is complete when all competencies have been demonstrated by internal training, assessments, or RPL process. A certificate is issued upon completion of an attempt.
Certification	Recognition of current training that expires and requires periodic refresher courses to remain valid, such as first aid certificates, equipment operator licenses, and inductions.

RPL	<p>Stands for Recognition of Prior Learning. We use the term in a loose context to describe all ways in which competency may be demonstrated from previous knowledge. It includes training completed at other organisations and knowledge gained in the workplace or life experience.</p> <p>The definition of RPL and the related terms RCC and Credit Transfer are used inconsistently across the industry. <i>EMT</i> allows you to use the terms the way you normally do, and map them to the official codes for reporting purposes.</p>
Offer	<p>A plan to deliver a course to one or more students.</p> <p>When the training is planned to take place in a group training facility with a teacher present at a given time and place, we call it a classroom offer.</p> <p>When the training occurs in a flexible environment (workplace, distance education, etc) we call it an assessment-based program, program or assessment-based offer.</p>
Session	<p>A plan to deliver part or all of a classroom offer in a single day between two times. They may be generated automatically from a course timetable and may be entered or adjusted manually.</p> <p>Sessions are optional within <i>EMT</i>. They are required in order to manage attendance, location utilisation & teacher schedules.</p>
Registration	<p>A registration is a tentative or firm commitment by a customer to pay for one or more students to attend a classroom offer. Registrations for assessment-based offers are restricted to a single student.</p>
Booking	<p>A booking is a registration that has not yet been paid for.</p>
Location	<p>A place where training is delivered. It can be configured at a level appropriate for the organisation (e.g. room, building, campus, etc)</p>
Territory	<p>A classification of sales agents. It is often geographically based, but may indicate market segments or customer types.</p>
Region	<p>A geographical area used to group locations.</p>

Event	<p>A pre-defined event in <i>EMT</i> that may trigger user-defined actions to be created, either automatically or upon a pop-up prompt.</p> <p>Examples of events that can trigger actions in <i>EMT</i> are:</p> <ul style="list-style-type: none"> New, cancelled or moved registration Student added or removed from a registration Offer details changed Assessment details changed New invoice, receipt or refund New payment scheduled Non-starting or absence level reached
Action	<p>A task that must be completed by a certain date. The outstanding actions form a collective "to-do" list for the organisation. They can be assigned to an operator, but can be processed and updated by other operators if required.</p> <p>Each action targets a single contact, but there are various features to generate actions for groups of contacts.</p> <p>Each action has an <i>action type</i>.</p>
Action Type	<p>Action types can be fully configurable to an organisation's needs. Examples of the types of actions that may be appropriate include:</p> <ul style="list-style-type: none"> Send a potential customer course information Phone a customer to arrange payment Notify a student of change to an offer Email a special offer to a former customer Have a sales agent call on the customer <p>Action types determine the default characteristics of actions of that type, which helps to stream-line your customer service procedures.</p>
Marketing Activity	<p>An individual marketing action such as a newspaper advertisement or radio advertisement. It must be associated with a <i>marketing campaign</i>.</p>
Marketing Campaign	<p>A group of marketing activities. They can be configured to align with your organisation's marketing strategies.</p>

1.3 The Business of Training

Enquiry Mate for Trainers provides comprehensive functions to support every aspect of running and improving your training business. As well as supporting the core requirement to manage student records, *EMT* provides features that will empower staff and managers to improve customer service and managing the business of training.

As the name infers, the primary focus of *EMT* is on generating and processing sales enquiries. The success of most small-medium businesses depends mainly on sales revenue. Costs are predictable and difficult to reduce greatly without compromising the core values of your business. In order to provide the level of choice and flexibility that customers expect, most training businesses carry excess capacity in the form of under-utilised venues and teaching staff. This effectively represents "empty seats".

Revenue, on the other hand, is much more variable. Customer demand can be stimulated or created by effective marketing strategies, product innovation & repeat business. *EMT* can help improve your sales by:

- Improving communications with customers during the sales process.
- Avoid losing sales by not "following up" on time and as promised.
- Direct marketing to your existing and past customers.
- Analysing the results of your marketing activities.
- Analysing the performance of your sales staff and referral sources.
- Analysing the financial results of every course you run.
- Analysing an acting upon student feedback.

The software also has features to help manage your resource utilisation, to determine where your spare capacity lies:

- Teacher / supervisor utilisation analysis.
- Workplace assessment visit schedules.
- Training location utilisation analysis.

In addition to these critical areas, the system provides flexible and comprehensive support for:

- Scheduling classroom-based offers and assessment-based programs.
- Actively managing the capacity of scheduled offers.
- Assisting in course preparation with resource checklists, class lists, etc.
- Recording and analysing attendance.
- Recording class or individual results at a module or assessment task level.
- Printing certificates, statements of attainment, transcripts and statements of attendance.

1.3.1 Why Enquiries are Important

A sales enquiry is an intangible but valuable asset to your business. The value of a sales enquiry is deceptively complex. It could result in:

- Selling the services being enquired about (obviously).
- Selling additional or alternative services that you offer.
- Selling additional or alternative services at some time in the future.
- A referral to an associate, who may reciprocate in the future.
- A referral by the enquirer to an associate of theirs.
- Recognition and a positive impression of your business and brand.

EMT is designed to support your sales staff in extracting the maximum value from every sales enquiry. Notice that some of the value in the enquiry does not result in immediate or even traceable revenue, but instead plants the seeds for future revenue. This value endures long after the customer has finished their course or declined your current offer, if you keep it and use it properly.

Sustained application of a sales process that extracts full value from every enquiry will, in time, lead to a steadily growing stream of "free" sales enquiries to supplement your main marketing activities.

Just some ways in which *EMT* might support this process include:

- Register interest and allocate a schedule a sales follow-up while on the phone.
- Take a booking on the phone and send a confirmation by email immediately.
- Send product information or course schedule by email, with a few clicks, before the customer even hangs up the phone!
- Generate focused and relevant mailing lists of past customers, in order to fill those "empty seats".
- Find and process contacts recorded on obscure or incomplete notes.
- Identify your best referral sources so you can reward and encourage them.
- Include enquiries that did not result in bookings in your marketing analysis.
- ...and many other strategies that may work for your business.

1.3.2 Why People are Important

EMT uses a single table of contacts, which contains all contact details. There is also a single table of companies that contains minimal data. All references that require contact details refer to a person however contacts may be searched by company.

Because *EMT* is designed to retain all history of customer interactions, it needs to handle the issue of when people move from one company to another. While there are various ways to handle this, we recommend that the contact remains the one and only record of that person. Even when a company is paying the bills, most customer relationships are effectively with people, not companies.

When a person moves positions or companies, this is a valuable opportunity to double the number of customers!

Firstly, you will want to find the person now responsible for training in the company for which you have done training in the past. It is likely that your existing contact will supply this. You set them up as a new contact, working for that company, even though there may be no current sales enquiry for them.

Secondly, you would update the company and contact details of the existing customer contact.

You now have two potential customers for future training services. If the old contact still has a new role and is no longer involved in training, you may be able to get the appropriate training manager contact in the new company, which you would set up as a third contact!

With a little bit of effort, asking the right questions of people you already know, you can turn a single contact into two or three contacts that may end up being customers, referrers or students in the future!

EMT is designed to track all of this, and enable you to retain and use your accumulated customer database to full advantage.

1.3.3 Why Actions are Important

EMT supports a system of automated and manual follow-up actions. These actions are created during sales enquiry processing, or can be generated in bulk from existing data. They can be also be generated automatically in response to events such as a student registration.

An action is assigned a responsibility and due date & time. This causes the actions to appear on the default action list for that operator, as shown below.

Actions								
Target Date	Who?	Action Type	Target Name or Company	Method	Notes	Status	Course (of related offer)	
10/11/2006	Martyn	NewRego	Joe Kerr (Cairns City Council)	E-Mail	New registration	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Chris	PaySchedule	Joe Kerr (Cairns City Council)	E-Mail	New registration	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentRemove	Joe Kerr (Cairns City Council)	E-Mail	Student removed from offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentReg	Joe Kerr (Cairns City Council)	E-Mail	Student registered in offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentReg	Adam Ayoub	E-Mail	Student registered in offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentReg	Mary Lamb (Cairns City Council)	Standard Post	Student registered in offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	RegoReceipt	Joe Kerr (Cairns City Council)	E-Mail	RECEIPT	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	Invoice	Joe Kerr (Cairns City Council)	E-Mail	INVOICE	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
12/11/2006	Martyn	FollowUp	Joe Kerr (Cairns City Council)	Phone Call		Late (6 days)	<input type="checkbox"/>	

The details of an action can be previewed, re-assigned, modified, emailed, printed or just marked as completed. The system supports automatic batch processing of email and printed letters, as well as manually completed actions such as phone, fax, mail or sales visits, etc.

The system is fully configurable to your existing sales process. Configuring this part of the system may prompt you to review these processes to take advantage of the capabilities of the system.

1.4 The Delivery Process

1.4.1 Life Cycle of a Classroom Offer

EMT is designed to support both classroom and assessment-based training through its entire life cycle.

A classroom offer begins life as a course, or training package. You cannot offer a course to students until you have at least some idea where and when you will deliver it. We call a scheduled plan to deliver a course an "offering", or "offer".

The system supports the scheduling of offers, and the publishing of available offers for use by customers and sales staff.

Depending on the situation, the offer may be conditional upon getting sufficient interest. *EMT* enables you to keep track of the status of the prospective offer, to make an informed decision on whether to proceed with it, and to keep all affected people informed.

During this time, you can take bookings, record any payment details, process cancellations, transfers and refunds, and allocate a teacher, location and other details.

Once the decision is made to proceed with the offer (or earlier), you will need to check that everything is ready to run the offer, such as ordering or printing notes, booking resources, etc. *EMT* implements a checklist that can include both general and course-specific items.

When first created, the content (list of modules) is copied from the course content. You may customise this list for the specific offer by adding or removing modules. This is particularly useful if you regularly deliver customised courses.

When first created, the weekly timetable for a course is used to generate actual training sessions for the offer, including actual dates and times. This process automatically skips public holidays, however you may need to edit the sessions to allow for other known variations. The sessions can be edited at any stage of the course (as long as attendance has not been recorded for the session).

You then print class lists, attendance sheets & evaluation surveys directly from the system.

During the offer, you can record attendance on a daily basis, including partial attendance, comment on reasons and trends, etc. This enables you to manage welfare issues and comply with overseas student visa requirements (the ESOS act).

Following completion of the offer, you can enter student results at, either an overall level or by assessment task, and print statements of attainment if applicable.

If the course is not accredited, you can just record attendance and issue certificates of attendance. These may, in fact, be printed prior to the offer, for distribution by the teacher at the end of the offer.

You can also enter any evaluation results & comments received and raise actions to address any specific customer satisfaction issues.

Finally, you mark the offer as finalised. It is then hidden from day-to-day view, but it is retained for future use and can be found by searching. It may also be used at some time in the future, such as to promote a follow-on or related course to the same students and/or customer, or to provide a student with credit towards a future qualification.

1.4.2 Life Cycle of an Assessment-Based Program

Assessment based programs include apprenticeships, vocational components of wider courses, distance education, online training, etc.

They have a very similar data structure to classroom based offers, and are implemented in *EMT* as single-student offers, however they have a very different life cycle. A program is usually undertaken over an extended period of time, and involves regular assessments of parts of the course content during that time.

An assessment-based program starts when a student applies to start the program. This is processed as a sales enquiry, even if the application is in person, or on paper. The enquiry must have been prompted in some way, and it is important to capture the original source of the interest for marketing and sales analysis.

When first created, the content (list of modules) is copied from the course content. You may customise this list for the specific program by adding or removing modules. This is useful for selecting streams or electives for an individual program.

Before or during the program, the checklist can be used to keep track of significant events such as contracts being submitted, payments being applied for, etc.

When the offer is started, there may be several assessment visits scheduled. These can be reported, re-scheduled or cancelled at any time during the program. The student and assessor can be automatically informed of any changes.

At any time during the program, results can be recorded against assessment events, including tracking of the marking process.

Upon completion of the program, an overall result is recorded. A statement of attainment can be printed, and the offer marked as finalised. If the program results in a qualification, that is processed separately as a qualification attempt (see below).

Like classroom offers, the program remains on record and may be found again by searching, or used in future marketing activities and analysis.

1.5 Qualifications and Training

1.5.1 Assessment and Learning

Unlike some other software packages, *EMT* implements training and qualifications completely independently. While they are often directly related, in that some courses may cover sufficient competencies to complete a qualification, this is not enough to process all qualification attempts.

In particular, each individual attempt at a qualification can be customised for the student, and must allow for:

- Completion of some competencies by recognition of prior learning;
- Stream and elective selections;
- Courses not leading to any qualification or competencies.

For these reasons, we have implemented qualification attempts as a separate process.

Most of the published AVETMISS subject areas (field of education), qualifications and competencies are supplied with *EMT*. This data may be selectively loaded into your organisation's *EMT* system to ensure consistent naming conventions and save a lot of typing!

1.5.2 Life Cycle of a Qualification Attempt

A qualification attempt begins on the Contact Details form, on the "Student" page. A qualification is selected and a new attempt is created for the student. This qualification attempt form can later be found using a search form directly from the main menu.

The default competencies for the qualification are copied from the definition of the qualification (which may be locally customised). These competencies may then be modified, for instance selecting a stream and electives. Other details are also entered on this form.

One or more competencies may be selected for RPL and the RPL application and assessment if necessary is managed on a separate form. The RPL application need not be completed immediately, as the assessment process may take some time. RPL applications can also be found by searching from the main menu or via the qualification attempt.

When the student completes the competencies with a competent result, the status is shown on the qualification attempt form. The student may have already completed some or all competencies before the attempt is created.

The assessor uses this form to check and record all details, and when all competencies are completed to his/her satisfaction, he clicks a button to issue the certificate number. The certificate can be printed immediately or at a later time.

This independent data model for qualifications allows for:

- Any mix of classroom training, assessment and RPL based results;
- Being completed over an extended period of time;

- Being applied for before or after training is undertaken.

1.6 Results

In *EMT*, results are based on modules, which make up courses. Each module can contain up to four structured assessment events, and an area for additional events.

To enter results for an offer or program, a result record is created for each student and module. The results can be entered in groups by selecting a group (or all) students and/or a group (or all) modules and setting the overall result.

You can enter details of the results for each student, or the results of an assessment task for each student in turn. As well as an overall weighted percentage mark, there is provision for a general text description of the result in which to enter any special comments or other details of the marking.

Results can be partly entered and returned to later. This is particularly appropriate for assessment-based programs where assessment tasks for the same module may be completed at different times during the program.

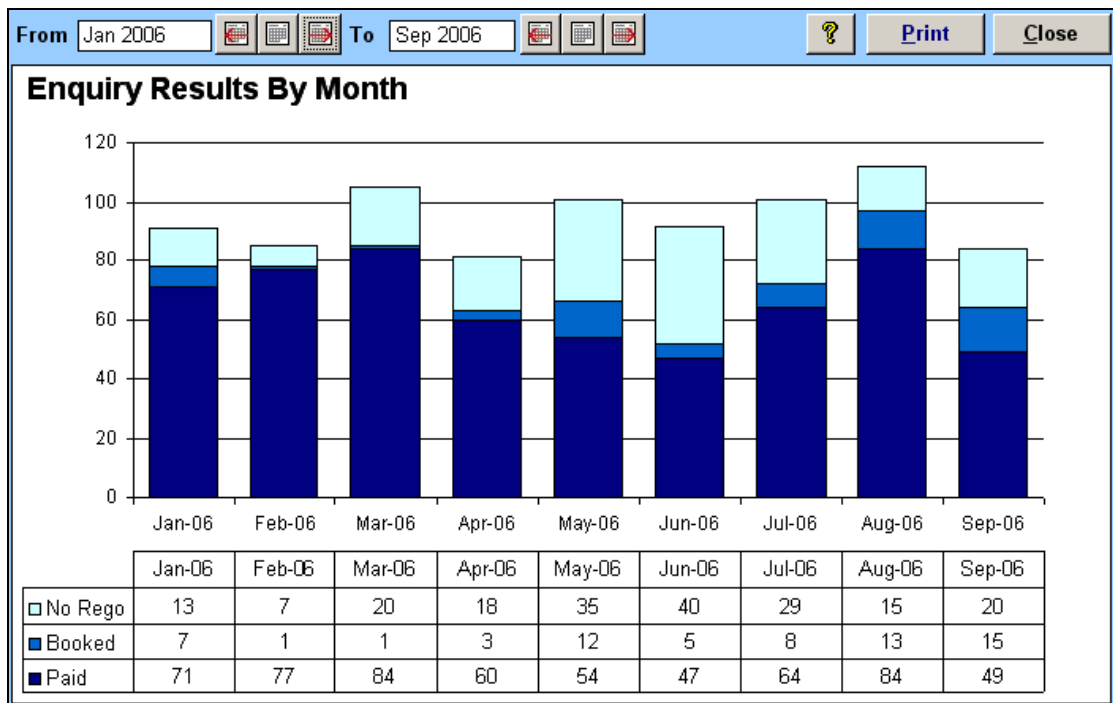
Entry of overall module results enables printing of transcripts at the qualification level. This course/module structure allows the flexibility to build training and assessment content that fits your customer's needs, and to map it to national competencies.

1.7 Business Strategy

EMT provides management with the information to make better decisions about allocation of marketing, financial and teaching resources.

1.7.1 Marketing Strategy

EMT implements a system of classifying every marketing activity, such as an advertising package, referral source, etc, into campaigns and activity types. Every sales enquiry comes from some activity, whether it is an active (e.g. advertising, trade shows) or background (e.g. word of mouth, referrals).



The reports and graphs produced by *EMT* show enquiries that did not lead to a booking, those that have booked but not paid (e.g. cancelled), and those that paid. This enables you to assess not only the quantity of enquiries generated from each activity, type or campaign, but also the quality.

1.7.2 Financial Management

EMT provides detailed analysis of the gross profit result from each offer. This analysis includes all direct costs, including hourly teaching costs and daily training location costs, sales commissions, materials and other expenses. On the revenue side, it includes both revenue from customers and funding sources.

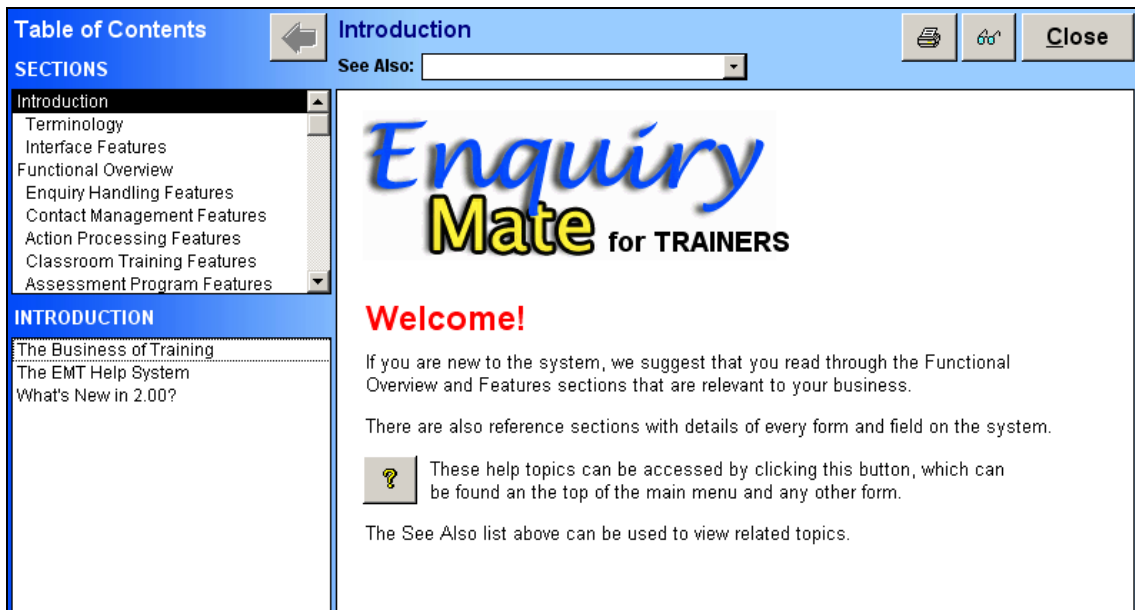
1.7.3 Resource Management

EMT provides reports to look at the scheduled utilisation of teachers, including both classroom training and assessment visits to help you manage their time.

EMT provides reports to look at the scheduled utilisation of training locations to help you manage usage of the locations and to assist in booking the resource if it is an external location.

2. Help System

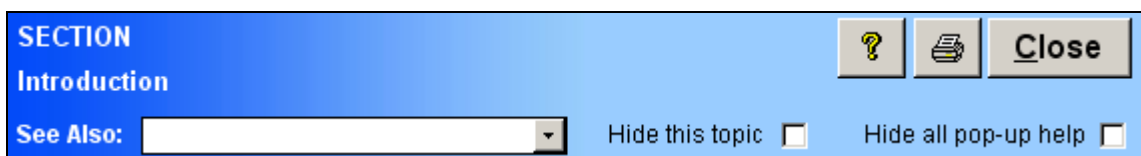
2.1 Help Window



- The Help Window is displayed when the **Help button** is clicked.
- Each **Section** is divided into **Topics**. Select a Section to display the associated topics below.
- The **See Also** drop down list can be used to navigate to related topics.

2.2 Pop-up Help

Pop-up help is displayed at the start of EMT.



Pop-up help can be disabled by clicking the relevant check box.

The **Show Pop-up** button (5) restores the display of **Pop-up Help** window after it has been hidden.

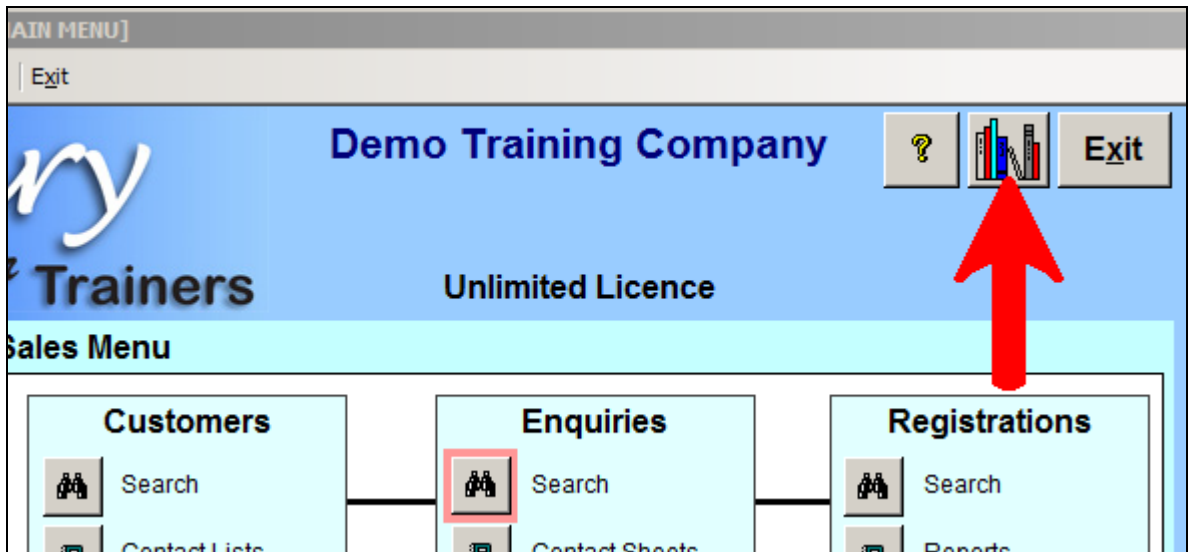
The **Confirm Show Pop-up Help** dialog is displayed.

- Click **Yes** option to show all popup hints.
- Click **No** option to remove the effect of the **Hide All** request. Pop-ups hidden with the **Hide this topic** option will still be hidden.

2.3 EMT Learning System

The EMT Learning System is progressively replacing this User Guide as the main tutorial resource for EMT operators.

It can be accessed from this icon on the main menu:














This will take you to the contents page where you can start any section or topic at any time. Topic 0.2 explains how to navigate the Learning System.

3. User Interface

3.1 Icons

The following icons are commonly used in *EMT*:

	Calendar – A calendar is displayed to facilitate the entry of dates.
	Add - Adds a line to a list box or create a new sequence number (e.g. invoice number). This icon is used in several ways, but it is always associated with creating new data.
	Delete - The selected item is deleted.
	View - Displays further details of the selected item.
	Browse for a File – Select a file name from disk.
	Browse for a Folder – Select a folder name from disk.
	Sort Ascending - Displays the list of items in ascending order of the selected column.
	Sort Descending - Displays the list of items in descending order of the selected column.
	Current Record (Record selector symbol) - The current record of the list.
	Editing Record (Record selector symbol) - The record is being edited and the changes have not been saved yet.
	New Record (Record selector symbol) - Information can be added to a new record.

3.2 Toolbars

The EMT system is based on Microsoft Access, and selected Microsoft Access toolbar items are available in each form.



These buttons provide access to standard commands such as:

- Printing
- Export of reports to Microsoft Word or Excel

- Record navigation
- Sorting of records
- Filtering of records

See Microsoft Access help for an explanation of these commands. A hint showing the function of a toolbar button is displayed when the mouse is placed over the button.

3.3 Combo Boxes

Drop-down lists (also called "combo boxes" in MS-Access) are used extensively throughout *EMT*.

Some combo box lists are based on reference lists, such as courses, offer status, payment types, etc. The items on the list can be configured via the Reference or System menus.

Other lists are based on current data from elsewhere in the database such as contacts, companies, offers, etc. The following example shows the company combo box in the contact search form.

By typing the first few characters of an item, the list will automatically search for the first item in the list beginning with the characters typed so far. Pressing the **Enter ↵** or **Tab ⇥** keys will close the drop-down list and complete the value with the selected item completed. In the company list above, simply typing "demo" and [Enter] would be more than enough to find "Demo Training". Note that the type case is adjusted to reflect the list item, so you don't need to capitalise the "d" to find the right item.

The ***EMT Installation Guide*** contains guidelines for how to configure many of the reference lists to streamline the day-to-day use of the system within your organisation.

3.4 Search Forms

The screenshot shows a 'Contact Search' form with a light blue header and a light cyan body. The form contains several input fields and a 'Search' button. On the right side, there is a 'Roles' section with a list of checkboxes and a note. The fields are: First Name, Last Name, Company (dropdown), Customer Type (dropdown), Suburb, Post Code (with 'To' field), Industry (dropdown), Job Role (dropdown), Nick Name, Member No (with 'To' field), Golf Handicap (with 'To' field), and Graduation Date (with calendar icons). The 'Roles' section includes: Customer, Student, Salesperson, Teacher/Supervisor, Assessor, Location Manager, and Publisher. A note below the roles states: '(Matches contacts who have ANY of these roles)'. The 'Search' button is located at the bottom center of the form.

Search forms are the basic method within *EMT* to find data from a "standing start".

Search forms contain a range of fields, but they do not all need to be filled in. If you have some specific information about a particular item you need to find, entering a unique key such as an offer number in a search form will take you straight to that offer.

If you know most of the details, you only need to enter a few fields in order to find all matches. If there is only one match, then you will go straight to that item. If there is more than one matching item, you will be shown a **list form**, with all of the matching items shown (see below).

If a search form has a large number of matching items, a warning will be displayed before opening the list form. This is mainly to avoid performance issues with shared databases. It is much more efficient to specify more specific criteria than to display an entire list and then try to find the item in the list form.

The fields below Postcode in the **Contact Search** form are **User Defined Fields**. An organisation may define these fields to record customised information for a **contact**. Two category fields (each with a list of possible values), four text fields, two number fields and two date fields may (optionally) be defined in the **System Settings** form.

3.5 List Forms

Contact List						?	Refresh	New	Edit	Close
First Name	Last Name	Company	Customer	Suburb	Post Code					
▶ Accounts		Cairns City Council								
Michael		Horizon Real Estate	Individual	SUSSEX INLET	2540					
Wendy	Aaron	Princeton Property Group	Individual	WAMBERAL	2260					
Samual	Abarca		Individual	ARMIDALE						
Amanda	Abbey		Individual	BEECROFT	2119					
Linda	Abdy	Capital Business Brokers	Individual	NORTH MANLY	2100					
Terry	Abed		Individual							
Xing Huo	Abel	Asher Enterprises	Individual	BEVERLY HILLS	2209					
Kerry	Abraham	Raine & Horne City Living	Individual							
Rivergum	Accounts									
Wayne	Achilles	Green Cottage Real Estate	Individual	ELLENBOUROUGH						
Dang Dung	Ackland	Self Employed	Individual	CANELY HEIGHTS	2166					
Bryan	Adair	Invision Group	Individual	KELLYVILLE	2155					
Andrew	Adamou	The Aldy Group Melbourne	Individual	MARYBOROUGH	4650					
Record: [Navigation Icons] 1 of 4193										

List forms are generally opened as a result of using a search form. Some common list forms can be opened from single buttons on the main menu. These faster lists generally show all current data, such as all outstanding actions or all available classroom offers.

Lists may be sorted by a selected column (ascending or descending) using the sort icons on the list toolbar. You can also use the other MS-Access functions shown on the toolbar such as simple to advanced filtering, text search, export to word or excel, etc.

These toolbar options are provided for additional flexibility for those familiar with them, but they are not an essential part of the *EMT* system.

Remember that it is much more efficient to use the search form criteria to reduce the list than to search within a large list. How much of an issue this will be, in practice, depends on the number of concurrent users, the computer and network hardware, the database platform, and many other factors.

3.6 Detail Forms

Detail forms are where most of the work is done in *EMT*. A detail form contains all the relevant information for a single data item, including lists of related items. Many functions relating to the item can also be activated from details forms. Thus, if you are not sure how to complete a task in *EMT*, a good starting point is to find the detail record of one of the things the task relates to and look for an appropriate field or button.

Many detail forms (usually the more complicated ones) use a "file tab" control to manage more than one page of data for the item (marked area 1). Click on the tabs to select a page. Switching between pages does not move to another record. It is simply a way to fit many fields on a single form. There will always be identifying information about the tab pages so that you can always tell what data item is being seen.

Throughout the system, fields which are used by the AVETMISS export process are marked with an asterisk (marked area two shows one of several example on this page). Some of these are fairly open in their format, but some are set from strictly defined lists (as in the State Code field above), which are not configurable for compliance reasons.

Kathleen Wilkins ? New Enquiry Delete Close

Primary Alternative Reference Statistical Customers Students

Title*	Ms	Student No	1358	Mail Address*	11/3 Defries Avenue
First Name*	Kathleen				
Last Name*	Wilkins			Suburb*	YUNGABURRA
Company	Raine & Horne Cabramatta	State	NSW	Post Code	2067
Department		Country	Australia		
Position		Home Phone*	<input checked="" type="checkbox"/> (02) 9660 7555	(Tick one or more to indicate preferred contact methods)	
Industry		Work Phone*	<input type="checkbox"/>		
Job Role		Mobile Phone*	<input checked="" type="checkbox"/> 0415 127 555		
Nick Name		Fax*	<input type="checkbox"/>		
Member No		Email*	<input checked="" type="checkbox"/> martynw@firststrike.com.au		
Golf Handicap		Web Site	<input type="checkbox"/>		
Graduation Date					

Accepts Promotional Material?

Roles

<input checked="" type="checkbox"/> Customer	<input type="checkbox"/> Teacher/Supervisor
<input checked="" type="checkbox"/> Student	<input type="checkbox"/> Assessor
<input type="checkbox"/> Salesperson	<input type="checkbox"/> Location Manager
	<input type="checkbox"/> Publisher

A type of field not mentioned so far are check boxes (see the **Roles** box above). A tick indicates a "true" value or positive answer to the question posed. An empty box indicates a false value, or negative answer to the question posed. You can change the state of a check box using the mouse, or by pressing the Space bar after reaching the check box in the tab sequence.

Kathleen Wilkins ? New Enquiry Delete Close

Primary Alternative Reference Statistical Customers Students

Export To AVETMISS? <input type="checkbox"/> (Only needed if "Export All Students" is unchecked in System Settings)	Prior Education* Add Prior Ed: <input type="text"/> <input type="button" value="X!"/>
Gender* Female	<div style="border: 1px solid black; height: 60px; width: 100%;"></div>
Date of Birth* <input type="text"/> Age <input type="text"/>	
Address State Code* 03 Queensland	Any Prior Education?* Not Stated
School Level Completed* <input type="text"/>	Disabilities* Add Disability: <input type="text"/> <input type="button" value="X!"/>
Final Year of School* <input type="text"/>	<div style="border: 1px solid black; height: 60px; width: 100%;"></div>
Currently At School?* Not Stated	
Employment Status* @@ Not stated	Any Disabilities?* Not Stated
Indigenous Status* @ Not stated	
Country Of Birth* <input type="text"/> (SACC Code)	
Language Spoken at Home* <input type="text"/> (ASCL Code)	
Spoken English Level* @ Not stated	

Some detail forms have list boxes of related items. In the example above, the marked area shows the disabilities list for the contact. Selecting an item from the yellow combo box adds the item to the list. Clicking the delete button will delete a selected item.

Other lists may have a view (magnifying glass) button that opens a detail form for the selected item. If the view button is present, then double-clicking on the list item will also activate the detail form.

3.7 Speed Keys

Buttons that have a letter underlined indicate a speed key for that form. Pressing that key while holding down the **Alt** key will activate the button, just a clicking with the mouse would. This can be a useful time-saver once you get used to it. It is particularly useful in search forms where you have typed a single criteria field. Pressing Alt-S will activate the **Search** button immediately without having to move your hand from the keyboard to the mouse.

The **Close** button is available in almost every form, so Alt-C is a quick way to close any detail form, but remember that for new data items, Alt-C activates the **Cancel** button!

3.8 Reports

Reports are accessed from the Report or Management tab on the main menu. Selecting a report displays a selection criteria form.

- The **Print** button immediately prints the report on the default printer.
- The **Preview** button displays the report on the screen. The report may be printed or saved as a Word document.

3.9 Reference Forms

Reference forms are used to update selection lists that do not change on a daily basis.

There are two types of reference forms. The more complicated ones have a detail form associate with them because there are too many fields to fit on a simple list. Courses are an example of this type.

Course List				?	Bulk Load	Refresh	New	Edit	Close
Course No	Course Name	Subject Area	Status						
▶ 30223QLD	Diploma of Forestry Industries - Technical	Forestry Studies	Offered						
AUC	Auctioning for Experienced Auctioneers	Real Estate	Not Offered						
AUCEXP	Auctioneering - Experienced	Auctioneering	Offered						
AUCNEW	Auctioneering - New	Auctioneering	Offered						
BASALES	Sales for Buyers Agents - New	Sales & Marketing	Not Offered						
BBCOR	COR - Business Brokers	Certificate of Registration	Offered						
BBSALES	Sales for Business Brokers - New	Sales & Marketing	Offered						
COR	COR - Real Estate & Buyers Agents	Certificate of Registration	Offered						
CPD1	CPD - Stage 1	CPD	Offered						
CPD1D	CPD - Stage 1 (Distance Ed.)	CPD	Offered						

Record: 1 of 37

These act very much like normal list forms. You cannot edit data within the list, and there is an **Edit** button to view the detail form (double-clicking the mouse on any field does the same). There is a **New** button to create new items in the list.

The other type is for simpler lists, such as the offer statuses.

Offer Status				?	Close
	Status	Description	Available?		
	Confirmed	Definitely proceeding	<input checked="" type="checkbox"/>		
	SYSTEM Proposed	May proceed depending on demand	<input checked="" type="checkbox"/>		
	Published	Course dates advertised	<input checked="" type="checkbox"/>		
	SYSTEM Cancelled	Cancelled	<input type="checkbox"/>		
▶	SYSTEM Completed	Delivered, results not yet entered	<input type="checkbox"/>		
	SYSTEM Finalised	Delivered, with results entered	<input type="checkbox"/>		
	In Progress	Course in progress	<input type="checkbox"/>		
*			<input type="checkbox"/>		

Record: of 7

These are simpler to use, and the data can be edited in the list. To add a new item, you can enter the details in the last line, marked with an asterisk (*) initially.

Some items may be marked **SYSTEM**. The system requires these statuses to exist to operate normally, and only the description of these can be changed.

4. Sales Enquires

4.1 Processing a New Enquiry

4.1.1 Scenario

A customer calls to ask for more information about some courses he saw advertised in the local paper.

4.1.2 Procedure

The call is answered by a customer service operator whose primary role is to process enquiries. The *EMT* system is already running and the operator answers the call, ideally using some kind of "hands-free" facility.

Customer: "I saw your ad in the Newcastle Herald for an Owner-Builders course. I'm thinking of building a house, but I understand I need to get some training and a certificate first."

Operator: "That's right. We run a weekend course over 6 weeks, and upon completion we issue the certificate you will need. Can I get your name?"

Customer: "Sure. It's John Smith."

The screenshot shows the 'Enquiry Search' interface. At the top, there is a header with the logo 'Enquiry Mate for Trainers' and the title 'Enquiry Search'. On the right of the header are a help icon (?) and a 'Close' button. Below the header, there are input fields for 'First Name' (containing 'John') and 'Last Name' (containing 'Smith'), followed by a 'Search' button. To the right of the search fields are three buttons: 'New Contact', 'Old Contact New Enquiry', and 'Current Enquiry'. Below the search fields, there is a 'Search Results' section with a 'Clear' button and a red box indicating 'No Matches Found!'. To the right of the search results is a 'Past Enquiries' section with a table. Below the 'Past Enquiries' section is a section for 'Current & Previous Registrations (most recent first)' with another table.

[The operator has already opened the **Enquiry Search** form, and now types the first and last names and clicks on the **Search** button. The results show that there are no matching enquiries. Because the system also searches for "Jon", "Jonathan" and similar spellings of both names, there is little chance that there is a record of this customer already on the database. The operator can safely assume that he is a new potential customer.]

Just to be sure (or perhaps as a matter of customer service policy) she asks: "Have you organised any training with us before?" He says "No", which confirms her assumption.

[The operator clicks on the **New Contact** button. A new contact and enquiry are created and opened for editing. The operator first enters what she already knows – that he saw an advertisement in the Herald, and collects the necessary data to process the enquiry.]

The screenshot shows the 'Enquiry Details' form in the 'Enquiry Mate for Trainers' software. The form is for a contact named John Smith with enquiry number Q001107. It includes fields for personal details (Title, First Name, Last Name, Gender, Date of Birth), contact information (Home, Work, Mobile, Fax, eMail, Web Site), and company information (Company, Department, Position, Address, Suburb, State, Post Code, Country). There are also checkboxes for 'Contact accepts promotional material?' and 'Active?'. A 'Marketing Activity' section is visible, showing 'Local Newspaper Ads' as the activity, with a campaign description of 'Advertising in local newspapers' and a description of 'Regular Promotions'. Navigation buttons like 'Preview', 'Delete', and 'Close' are at the top right.

At this point, it is up to company policy as to how much information is gathered. Asking the customer for all details is probably not appropriate at this stage of enquiry. We would suggest that recording the marketing activity, courses of interest, and two forms of contact (an address, email or fax to deliver the material, and a phone number to check it was received) would be the minimum required to process the enquiry.

This might also be a good time to "up-sell" the customer on additional related courses, by suggesting that you include information about general building courses, OHS courses, and perhaps some general material about your company, special offers, loyalty programs, etc. If the customer responds positively, you might add some extra items of interest to the list.

At this stage, you don't need to obtain permission for general promotional materials to send these materials since the customer has asked for this specific information. It is also reasonable to contact the customer to confirm that the material arrived as requested.

At this stage, however there is no implied permission to send marketing materials on an on-going basis unless you explicitly ask. It is probably more effective to ask for explicit permission later once some trust has been built up.

EMT evaluation forms include an option for the students to give this permission at the bottom of the form, when they are (hopefully) feeling that they can trust your company to send only relevant information and stop if asked.

If he decides not to proceed with a booking immediately, but will reconsider at some time in the future, this is an ideal opportunity to ask whether he would like to be kept informed of upcoming offers and events (and thus obtain explicit verbal permission).

Including this question as "fine print" on a registration form is viewed with a great deal of suspicion, and is more likely to get a "No" response than a positive direct approach.

The screenshot shows the 'Enquiry Details' page for John Smith, Enquiry No Q001107. The interface includes a navigation bar with 'Contact', 'Interests', 'Actions', 'Notes', and 'Registrations'. The main content area is divided into several sections:

- Courses of Interest:** A dropdown menu showing 'Owner Builders Certificate (OB1)'.
- Subject Areas of Interest:** A dropdown menu showing 'Building'.
- Dates of Interest:** Fields for 'From' and 'To' with calendar icons.
- Preferred Times:** Checkboxes for 'Daytime' (checked), 'Evening', and 'Weekend'.
- Preferred Methods:** Checkboxes for 'Classroom' (checked), 'Workplace', and 'Distance'.
- Registration History:** A table with columns 'Start', 'Course', and 'Status'.

Now you need to decide how you will follow up the enquiry, and agree to that plan with the customer.

Operator: "Thank you for calling John. We'll send you the course information by email immediately. Is it ok to call you in a week to see if you want to go ahead and register on a course?"

Customer: "Yes, that's great. Thanks."

[The operator creates an action to send the information, makes some notes about what to include, and creates an action item for a salesperson, who is yet to be allocated at this stage, to follow up the sales lead.]

As you can see, the enquiry handling process is integral to your company's sales effort. Customers who feel they have a two-way relationship with a business are much more likely to be changed from enquiries to sales, and are more open to future approaches, up-selling, and providing referrals.

Having a systematic approach to customer service is not about reducing interaction with the customer. It's about improving the quality of the interaction and achieving the best outcomes for both parties by building trust. The first step in building trust with new customers is to deliver on your small promises, like calling back at an agreed time.

Enquiry Mate for Trainers **Enquiry Details** John Smith Enquiry No Q001107

Enquiry Action Items New Action:

Target Date	Action Type	Method	Resp	Notes	Status
16/11/2006	FollowUp	Phone Call	Martyn		Late (same day)
16/11/2006	InfoGeneral	Standard Post	Chris		Late (same day)

Action Type **Notes** **Created** 16/11/2006 1:08:52 PM
Target Date
Responsibility
Contact Method
Completed?

Notes
Call to discuss RPL options.

At this stage, the enquiry has been processed as far as it can until the customer calls again or until the follow up a week later. You can close the enquiry form and finalise the phone call with confidence that the action to send the material will be processed in a timely manner, and that the sales process will be followed up in a week.

The actions will appear on the action list until they are completed, and the due date and responsibility assignment ensures that nothing gets forgotten. We will see how that process works later.

4.2 Updating an Existing Enquiry

4.2.1 Scenario

John Smith calls back three days later after receiving the material and wants to register for one of the offers of the Owner Builders course.

4.2.2 Procedure

The call is answered by a customer service operator whose primary role is to process enquiries. This may or may not be the same person as before. The *EMT* system is already running and the operator answers the call, ideally using some kind of "hands-free" facility.

Customer: "It's John Smith here. I got the information on the Owner-Builders certificate course and I'd like to book for the course starting in September."

Operator: "That's great John. Please wait a moment while I find your details..."

[The operator enters the first and last names, clicks the **Search** button and gets the following results.]

Enquiry Mate for Trainers Enquiry Search ? Close

Search Results

John Smith (WANGI WANGI)	WANGI WANGI
--------------------------	-------------

Enquiries by John Smith (WANGI WANGI)

Date	Course	Active?
16/11/06	Owner Builders Certificate	Yes

Current & Previous Registrations (most recent first)

Start Date	Course	Status

[Only one person of that name is found, and the only enquiry is for the right date and course, so it is almost certain that this is the right enquiry. The operator double-clicks on the enquiry in the **Past Enquiries** list and is taken to the enquiry detail form. The form is the same as above except that the **Enquiry Search** action has been actioned and is now in **Completed** status.]

Operator: "Can I confirm that your home phone number is 4959 5555?"

Customer: "Yes, that's it."

[Techniques to confirm the identity of the customer are an important part of your interaction with the customer, and there are many more subtle approaches than this. If they can't deal with the same person each time (which is preferable), most customers are willing to cooperate with a systematic approach because they know that it is likely to ensure that their enquiry is processed correctly.]

The operator finds the Owner Builders offer in the **New Rego**: yellow combo box (there is only one starting in September) and selects it. The default details appear in the registration details area and John is automatically recorded as being the one and only student in the registration.

As soon as this happens, a popup message appears asking whether to create an **Advise Registration Received** action as a result of the **NewRego** event. This is a prompted event action that has been configured specifically for this business. There are also two other actions that were created automatically without prompting. This behaviour can be configured to support the organisation's workflow.

Enquiry Mate for Trainers Enquiry Details John Smith Enquiry No Q001107

Buttons: ? Preview Delete Close

Tabs: Contact Interests Actions Notes Registrations

Registrations Table:

Offer No	Type	Date	Course	Students	Status
C001006	C	4/12/2006	Owner Builders Certificate (OB1)	1	Booked

Event New registration dialog:

NEW REGISTRATION
Do you want to create the following action?
Confirm registration with customer

Distribution List:
John Smith

Buttons: Yes No

Form Fields:

Offer No: C001006 Contact: John
 Rego Status: Booked Reason*:
 Students: 1 Sales Person:
 Concession*: Commission:
 Price/Student: \$660.00 GST
 Total Price*: \$660.00 Notes: 000009 Accounting Details
 Payment Amt: \$0.00
 Payment Type:
 Payment Date:
 Payment Plan:

Buttons: New Offer (Classroom) New Offer (Assessment)

Since this is a very normal situation, the standard price applies, no concessions are available, and there is no sales agent involved, the only thing left to do is to process the payment details (see below).

UPDATE: In release 3 onwards, this form includes a **New Registration** button at the top of the form which replaces the two **New Offer** buttons. This button steps you through the registration process in a more controlled way, giving you the option to select details relevant to the type of registration.

All of the registration detail fields, and the student list, have been moved to the **Registration Details** form which is accessed using the view (magnifying glass) button or double-clicking the registration in the list.

This concludes the registration process for this easy case... but what if things are not so easy? In the next section we describe how *EMT* can process some of the exceptions and problems that can arise in the process.

4.3 Tracking Payments

EMT can track payments in a few ways. Firstly, you can simply record an initial payment in the registration, such as an application fee or deposit. You can then wait for full payment and later update the registration status to "Paid" status and the system will treat it as paid.

To process things in a more detailed way, you can set up payment plans with various methods and select a plan for the registration. This can be set up using the **Payment Plans** function on the Reference menu.

Payment Plan Details		?	Delete	Close
Plan Code	<input type="text" value="3-Month Plan"/>			
Description	<input type="text" value="Deposit and 3-monthly payments"/>			
Initial Payment	<input type="text" value="\$500.00"/> or <input type="text"/> % of Total Price.			
Followed By	<input type="text" value="3"/> payments due <input type="text" value="monthly"/>			
	Delay first payment until the next <input type="text" value="15"/> of the month.			
Chase payments	<input type="text" value="7"/> days after they fall due.			

Payment plans apply only to the amount remaining after any "Amt Paid" value has been deducted, but the plan may include an initial payment to be invoiced or paid later.

In the **Registration Details** form, the **Billing** page shows a list of all "Charges" associated with this registration. If you select a payment plan on this form, the system will generate one or more charges (according to the definition of the plan) to charge the **Total Price** less and **Amount Paid**.

You can also add standard extra items using the **Add Extra** option below the list. Standard extra items can be configured on the **Reference** menu. They may include things like notes, text books, student services, admin fees, etc.

You can also just create new charges from scratch, edit existing charges and delete charges (as long as they have no payments against them).

Payments are recorded independently and are then applied to selected outstanding charges. You can then find and report on payments using the payment details, or via the payment actions they are applied to. You can also report on outstanding payments and customer balances.

4.4 Processing Actions

The operator (Chris) has promised John to send Owner-Builder course information via email. Chris creates a new Enquiry action. It is normally due in 7 days time but she changes the due date to tomorrow's date. If appropriate, she can assign another person to be responsible for the task.

Since she promised John to send the information by email, Chris then changes the contact method to **e-mail brochure**. She records the details of the information that John requires.

Chris also asked John if she could call back in a week's time to see if he wanted to proceed with the course. So, she created a **Follow-up** action due in 7 days time with a contact method of **Phone call**.

The following day, Chris checks her action list. She sends the email to John and marks the action as **complete**.

In 7 days, the action to ring John to follow-up on his enquiry is listed on Chris's action list.

The action list can be **filtered**. Filters allow you to view only selected items from a list. The criteria for the selected items are chosen from drop down lists.

In the **Actions** window below, only those actions with the **Responsibility** of "Admin" and the **Action Type** of "General" are listed.

Actions								
Target Date	Who?	Action Type	Target Name or Company	Method	Notes	Status	Course (of related offer)	
10/11/2006	Martyn	NewRego	Joe Kerr (Cairns City Council)	E-Mail	New registration	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Chris	PaySchedule	Joe Kerr (Cairns City Council)	E-Mail	New registration	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentRemove	Joe Kerr (Cairns City Council)	E-Mail	Student removed from offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentReg	Joe Kerr (Cairns City Council)	E-Mail	Student registered in offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentReg	Adam Ayoub	E-Mail	Student registered in offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentReg	Mary Lamb (Cairns City Council)	Standard Post	Student registered in offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	RegoReceipt	Joe Kerr (Cairns City Council)	E-Mail	RECEIPT	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	Invoice	Joe Kerr (Cairns City Council)	E-Mail	INVOICE	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
12/11/2006	Martyn	FollowUp	Joe Kerr (Cairns City Council)	Phone Call		Late (6 days)	<input type="checkbox"/>	

Record: 1 of 9

To remove an individual filter, double click in the filter criteria text box. To remove all filters and show all Incomplete actions, click the **Show All** button.

UPDATE: The action list has been upgraded in release 3 onwards and includes additional filter options and explicit buttons to complete or delete one or more actions from the list.

Actions can be automatically generated in response to events such as **Student Registration** or **Offer Cancellation**.

5. Configuration

At this stage, we'll take a break from processing day-to-day enquiries and discuss the configuration options that are available within *EMT*. If you have just purchased the *EMT* system, you will probably be eager to set up the system to fit your training organisation. Before the first session is finished, we want to cover the major configuration tasks that will be needed to get you started. Ideally, some configuration will have been done by the time the second session starts.

UPDATE: Configuration is described in more detail in the *EMT Configuration Guide*. What follows below is a short description of what data items are normally entered when first configuring the system.

The **Setting Wizard** and the **Course Wizard** functions (**Reference** menu) are designed to make this process quick and easy. These functions are usually explained to you and demonstrated immediately after installation. Try them out before attempting to adjust the configurations manually as they may save you a lot of time.

5.1 Managing People

5.1.1 Customers and Students

A customer organises training for one or more students and is responsible for the payment of the training. It is possible for a customer to also be a student.

For example, the training manager for a company who organises and pays for the training of staff is the **customer**. The staff are **students**. A student who books and pays for himself is both a **customer** and a **student**.

You can specify custom fields for contacts to record data that is specific to your organisation in the **System Settings** form (on the Custom Fields page).

5.1.2 Supervisors, Teachers & Assessors

A teacher is a contact who is assigned to teach an **offer**. Up to three teachers may be assigned to a classroom offer. One teacher is designated the **Supervisor** and is responsible for administering the delivery and assessments. The other two teachers are called **supporting** teachers, and assist mainly with course delivery.

An **Assessor** is a teacher who is assigned to an assessment-based program. He may be scheduled to assess the student on-site or by phone by recording **Assessment Visits**. These scheduled visits appear for that teacher on the Teacher Utilisation report.

5.2 Workflow Features

5.2.1 Define Event Actions

Events are generated by EMT at pre-defined points in the processing, and cannot be changed by the client. An event may cause user-defined actions to be created. Up to three action tasks may be triggered, either automatically or upon user confirmation, when an event occurs.

There are three types of events that can trigger actions in *EMT* are:

Events referring to registrations

- Registration cancelled
- Registered students moved to another offer
- Student registered in offer
- New invoice, receipt or refund created
- Scheduled payments created or actual payments recorded

Events referring to offers or assessment programs:

- Offer start
- Offer cancelled
- Assessment visit changed

Events referring to attendance:

- Student not starting an offer (at a warning or reporting level)
- Student absent from 5%, 10%, 15%, 20% or 30% of the sessions

Attendance related events require that sessions are created, attendance is recorded, and that the student be marked for **Attendance Tracking** in the either in the individual Contact detail, or in the System Settings (which applies to all students). You will also need to check the **System Settings** to ensure that the non-starting limits are appropriate for our organisation.

Before you can define your events, you will need to define your action types.

5.2.2 Define Action Types

Actions are tasks that must be completed. When a new action is defined, default settings for the action are derived from the Action Type. These settings are:

- Contact method (e-mail, letter, phone call, etc)
- Responsibility (the responsible staff member)
- Due date
- Form letter (optional)

5.2.3 Contact Methods

Each **action** is associated with a **contact method**. An organisation defines their own contact methods such as:

- Phone
- Email
- Post

The contact method determines if the action is assigned to the print queue or the email queue (or neither).

If a form letter is defined, the action may be completed by sending an email directly from the system, or printing the form letter for mailing in a pre-designed format.

If not, an email or letter may still be produced but it will have a basic format containing the description of the action, and signed with the responsible staff member's logon id. This is not as tidy, but may be useful for sending adhoc notes to staff members or third party associates.

An email address must be defined for an action to be placed in the email queue.

5.2.4 Defining Form Letters

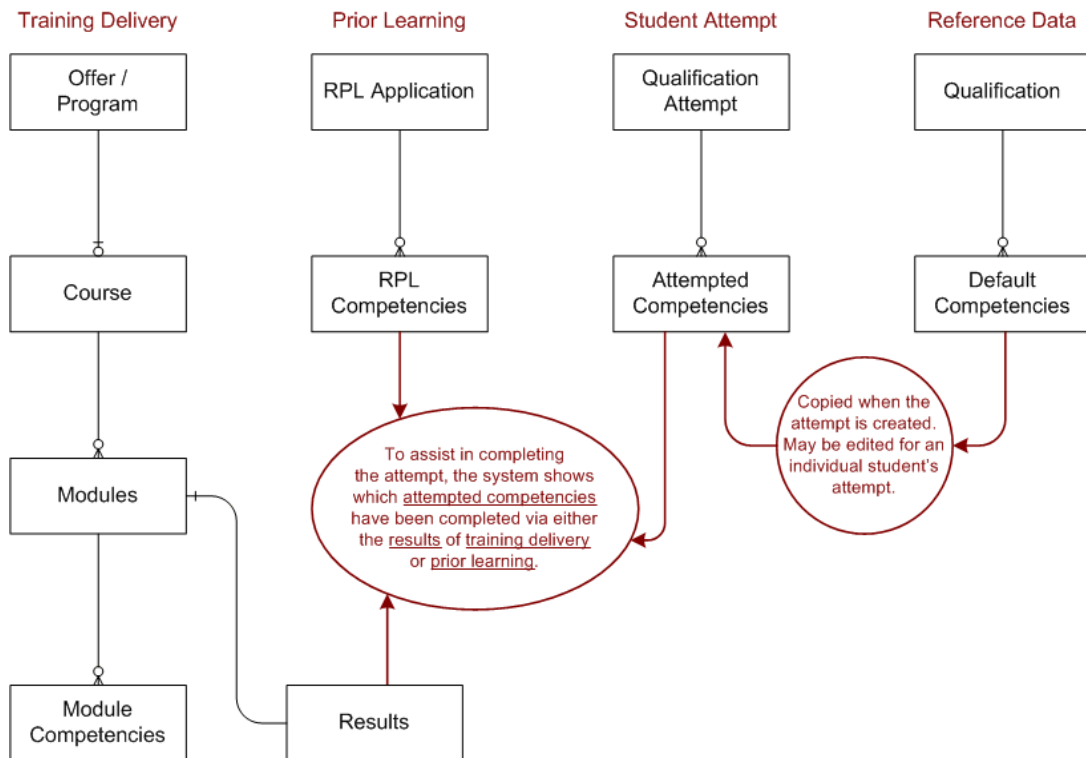
Form letters may be defined that allow database information to be merged with form letter templates.

A form letter can have up to two attached files. These files will be automatically attached to emails, but not used in printed letters.

A form letter can define a signatory. This is the person referred to in any Signature-related merge fields embedded in the form letter. It is only required if these merge fields are used.

5.3 Defining Training

This diagram shows the relationship between training and qualifications:



You can see from the diagram that the link between the Training Delivery structure, the RPL application structure and the Qualification Attempt structure is not direct.

These areas only come together when an assessor is deciding whether a given student's attempt to complete a qualification has satisfied the rules for that qualification. At that time, the assessor views both the required competencies for the attempt (possibly customised for the student) and what completed training results and/or RPLs apply to each competency. The completion of the attempt is strictly the decision of the assessor, as required by the AQTF standards and is not automated by the system.

This *indirect* relationship enables *EMT* to handle the many different ways that a qualification can be attained, in a manner consistent with the standards.

5.3.1 Course Structure

Courses are identified using your own internal numbering system, which may or may not match AQTF numbering. If you deliver courses which align to an entire AQTF qualification, or to an individual competency, you may like to use the AQTF number to identify the course. This is not necessary, and you can create any number of courses and number them according to the way you deliver courses.

The most important setting in the **Course Details** is the **Expected Result** option. This controls how the system behaves in many ways. Choosing an appropriate is critical to making the system run smoothly for you. It controls what documents are generated, how modules are copied from the course to offering of the course, and also affects some compliance reporting.

A course may have a weekly timetable of **sessions** which define what days of the week it is run on, and at what times and places. This timetable is applied to the date range for an offer to generate dated sessions for offers of the course.

A **course** may be associated with one or two **Qualifications**. Linking the course to the correct qualification(s) enables the system to automatically generate Qualification Attempts when a registration is recorded. It also affects the wording of statements of attainment for the course.

Each Course may consist of a number of modules.

Modules are simply a unit of training that is internally defined. Again, if your modules align directly to AQTF competencies, you may want to number them in that way. You may instead give them your own internal identification.

A module can be considered a section of training that is assessed. Each module may have up to four assessment tasks defined for it. Satisfactory completion of all tasks for a module leads to competency in all competencies related to the Module. Each Module may cover a number of competencies.

Competencies are numbered according to the AQTF numbering system. *EMT* includes a database of most of the AQTF competencies. You can select some or all of the standard competencies from this list using the **Bulk Load** form.

The exception to this may be **Work Cover** competencies, which fall outside the AQTF and have an independent numbering system. You may manually enter competencies if you cannot find them on the list provided.

5.3.2 Qualification Structure

Qualifications are numbered according to the AQTF numbering system. *EMT* includes a database of most of the AQTF qualifications. You can select some or all of the standard qualifications from this list using the **Bulk Load** form.

A qualification consists of one or more **standard** competencies.

When a student attempts a qualification, the **standard** competencies are copied to the individual's attempt and they may then be adjusted for the student to allow for electives, prior learning, etc.

When a student is competent for all the competencies associated with his qualification attempt, the qualification may be awarded by a qualified assessor. A student is considered to have achieved a competency if he has a competent result code for a module which covers that competency, or a successful RPL attempt for that competency.

5.3.3 RPLs & Credit Transfers

There are two ways to manage the RPLs and Credit Transfers.

RPL Application

The first method involves creating an RPL attempt in the **Qualification Attempt Detail** form for the student. The RPL or Credit Transfer is assessed and may be accepted, without any training component.

This is the standard method of managing credit transfers (or TFR) where the paperwork from another RTO is checked and recognised.

Assessment Courses

The second method is to set up a Course specifically to RPL one or more competencies. This method is appropriate when you regularly recognise prior non-formal learning for the pre-requisites for a course and charge for the time and paperwork required to complete the assessment.

You may have the TAA40140 course involving 12 months of training and assessment tasks, and the TAA40140-RPL course which includes four weeks of assessment tasks, but no training component. There may also be some fill-in training for people qualified in an earlier version of the qualification who need knowledge of what has changed (say TAA40140-RENEW). All of these could be set up as separate courses, with different costs and characteristics.

The RPL-only course would record a result code of RPL, RCC or TFR (you can customise the codes used) but otherwise be just like a normal course.

RCC (Recognition of Current Competency) is a term meaning the same as the modern meaning of **RPL**, however the definition of RCC has been revived in AVETMISS 6.0 (which applies from 2007), so the common understanding of the term is likely to remain inconsistent for some time.

5.3.4 Expiring Certifications

In *EMT*, a **Certification** is a certificate that expires and requires periodic refresher courses to remain valid, such as first aid certificates, equipment operator licenses, site inductions, etc.

Each certification has a certification type which you define. A **Certification Type** defines the characteristics of **Certifications** which are issued to individuals, including the normal duration and whose name appears as the authorising person on certificates.

You can **optionally** assign a category name and list of valid values to a certification type. For instance, a machine operator license may have a category called "Equipment" and values indicating the type of equipment that the certification applies to. A site induction may have a category of "Site" to indicate the site that the induction applies to.

You can also record certifications that were issued externally by another organisation. For these, you do not issue certificates, however it is useful to record these if you are aware of them for marketing purposes. You may also want to use EMT to record your assessor certifications or other professional certifications for which you do not necessarily deliver training.

5.4 Delivering Training

5.4.1 Classroom and Assessment Offers

A **course** is a unit of training content for which training is offered. An **offer** is a plan to deliver a particular course to a group of students at a given time and place. An organisation may run any number of offers of the same course, at any time, with overlapping dates if needed.

Offers may be classroom-based or assessment-based. Classroom and assessment offers are similar. The major differences are:

- An assessment offer can only have one student.
- A classroom offer has a supervisor and up to two supporting teachers. An assessment offer has one assessor.
- Different standard checklists are defined for an assessment offer and a classroom offer.
- A classroom offer may have sessions. An assessment offer may have assessment visits.

It is possible for a qualification to involve both types of offer. There may be both a workplace (vocational) component which would be managed as an assessment based offer, and a classroom (theory) component managed as a classroom offer, shared with other students. A qualification attempt is independent of the training. The attempted competencies can be completed in any number of different separate offers (or RPLs) which may be managed, booked, paid for and assessed in a variety of ways.

5.4.2 Session Schedule

Default session details are defined for a course, including the days of the week and the times on each day. When a new classroom offer is scheduled, the default sessions are created if the course has the **Attendance Tracked** check box checked.

Sessions may be added and modified from the **Offer Details** window (Session tab). You can also regenerate sessions from the schedule and any sessions which do not already exist will be added. This enables you to extend the dates of the offer and then generate the additional sessions without disrupting the existing sessions (for which attendance may already have been recorded).

Attendance, session notes, location and teacher can be recorded for each session.

5.4.3 Check Lists

Different standard check lists are defined for classroom and assessment offers.

Each course may have its own checklist items. The items for the course check list are interspersed with the standard checklist list items (for the Offer Type) based on the Sort Order values used in each configuration area.

5.4.4 Result Codes

An organisation may define the result codes and how they map to AVETMISS Outcome Codes. Some standard result codes are supplied with *EMT*:

Result Code	Description	Outcome Code
R	Recognition of Prior Learning	60
T	Credit Transfer	50
C	Competent	20
N	Not Yet Competent	30
X	Not Started	66
W	Withdrawn	40

The outcome codes may be adjusted with updates to the AVETMISS standard and state data submission rules. The **Code** is the organisation's result code and the **Outcome Code** is the corresponding AVETMISS code. Both these codes are used in AVETMISS reporting, but the **Outcome Code** is the most important.

Note that it is possible to assign more than one internal **Result Code** to a single **Outcome Code**. For example, you may want to record graded levels of competency, such as Pass, Credit, Distinction & High Distinction, and map each one to the **Competent** outcome code (20) for reporting purposes.

UPDATE: This table now includes the value to be reported in RAPT reporting, which is an alternative data submission format used only in WA.

5.4.5 Attendance Codes

An organisation may define the Attendance codes. The standard Attendance codes supplied with *EMT* are:

Attendance Code	Description	Adequate?
PRESENT	Present the entire session	Yes
LATE	Arrived late but covered session content	Yes
EARLY	Left early but covered session content	Yes
PART	Present only part of day. Missed some content	No
ABSENT	Absent for entire session	No

The **Adequate** field indicates whether the attendance code represents adequate attendance for purposes of overseas student notification. You may want to identify when a student arrives somewhat late, but require him to stay behind to make up the time rather than reporting an absence. This enables you to track potential welfare issues without necessarily triggering attendance reporting events. You may want to create a "VERY LATE" code for example which is not considered adequate attendance on that day.

When recording attendance, you can also record text to describe the reason given, documentation provided or circumstances. This enables you to build a complete picture of each student's attendance record.

5.4.6 Evaluation Surveys

Evaluation Responses

The text for the evaluation responses is entered on the Evaluation tab in the System Settings. There are five levels of responses plus a "no response" response.

Each response has a score to calculate a grading.

The default **Evaluation Response** table is shown below:

Answer Level	Response Text	Score
1 (The worst)	Unsatisfactory	-2
2	Below Average	-1
3	Average	0
4	Above Average	+1
5 (The best)	Excellent	+2
0 (No Answer)	Not Applicable	Not Counted

Evaluation Questions

A list of evaluation question is entered via the Reference Menu. When installed, some default questions are provided, such as:

Question	Question Text
Content	How well did the course content align with your needs?
Amenities	How were the facilities in the amenities?
Location	How easily did you find the venue and room?
Overall	How would you rate the course overall?
Workplace	How relevant was the course to your workplace?

The wording of the questions needs to align with the evaluation responses above. These questions are available for use in any course. They may be generic or specific to particular courses.

Course Evaluation Questions

A survey is designed for each course on the **Evaluation** page of the **Course Detail** form. You select questions from the standard list of questions by their short names, and may re-order them.

This structure enables you to compare not just the responses to questions at various offers of the same course, but to compare responses across courses such as ratings of the location, equipment or teaching style.

As you enter the responses, you can raise actions to address specific issues identified in the response. The system notes any level 1 (the worst) responses and will prompt you to create an action if you have not done so already. You may want to create standard action types to handle these survey follow-up actions.

5.5 Management Features

UPDATE: EMT includes features to export Quality Indicator data, RAPT (WA) and CQR (WA) reporting. The release of AVETMISS 7 may cause further adjustments and extensions to the reporting features.

5.5.1 AVETMISS Reporting Fields

Fields marked with an asterisk (*) are required for AVETMISS reporting. These fields appear in these areas:

- **Contact Details** form.
- **Funding Sources** are mapped to AVETMISS National and State codes. Funding sources should be defined for **Fee for service funding** (AVETMISS National Code 03) and **Full fee-paying overseas client** (AVETMISS National Code 04).
- **RTO Details** page in **System Settings** form.
- Course, Module, Competency & Qualifications details
- Offer details

The critical date fields for AVETMISS reporting are:

- Offer Start Dates are used as the commencement date of training.
- Certificate Issue Dates are used as the date that qualifications are completed.
- Result Dates are used as the date that modules and nationally recognised short courses are completed.

5.5.2 MYOB Export Account Settings

Sales accounting details may be exported to MYOB either as unpaid, partly or fully paid invoices or as individual payments.

EMT requires the following default MYOB Accounts numbers to be defined in the **System Settings** to export invoice data to MYOB.

- Bank (Asset) account number
- Sales (Revenue) account number

Revenue from each **Course** may be allocated to a particular Sales (Revenue) account which overrides the default for registrations related to that course. You can set this in the **Course Detail** form.

Sales may be recorded as crediting a selected bank account when a particular **Payment Method** is used to pay for the registration. You can set this in the Payment Method reference form.

5.5.3 Marketing Campaign Activities

A Marketing Campaign may contain a number of Marketing Activities.

"Newspaper Advertisement" or "Newsletter" are examples of Marketing Types.

For example, A Newspaper Advertisement advertising Tourism courses in Saturday's Herald is an example of a Marketing Activity. A marketing activity has (optionally) start & end dates, a total cost and a list of subject areas and/or courses.

5.5.4 Financial Settings

Revenue and cost values are stored in:

- System Settings (which provide a global default for some figures)
- Course Details
- Contact (Teacher) Details
- Location Details
- Offer Details (which are populated from the related items above)

Using this information, a Profit and Loss calculation is performed so the viability of each offer can be determined, either before confirming that the offer will be run, or after the offer is finished.

The values are based on various rates. Some are a fixed cost per offer; some are based on teaching hours of the course; and some are based on the number of students. Full details of the calculation are discussed in session 4.

When first configuring *EMT*, you may not have reliable figures for some of these values. We suggest that you enter some "best guess" values initially, if specific values have not been monitored. We recommend that you review these figures periodically based on actual and averaged accounting figures.

The quality of the results will depend entirely on the quality of the values entered, but even "rough" figures may be sufficient to compare the relative profitability of the courses you run.

Session 2

(Sales)

Enquiry Exceptions

Contacts

Events & Actions

Mailing Lists

6. Enquiry Exceptions

We covered the basics of sales enquiry handling in Module 3, however the process is often not as simple as described there.

In this module we describe what features *EMT* has to handle adjustments, changes, corrections, cancellations, refunds and other exceptional cases.

6.1 What if an existing customer makes a new enquiry?

While you may not recall very many such cases, if you are doing your direct marketing correctly, it should be a regular occurrence that a customer calls with a new enquiry, but they are in fact a past customer.

In this case, you will see the person's and enquiries (and perhaps registrations), but the dates will be old and the registration status will be "Completed". Use those details to confirm that you have the right existing customer and not just someone with the same name as a past customer.

Make sure you have selected the contact on the list on the left, and click the **Old Contact, New Enquiry** button on the Enquiry Search form. This will create a new enquiry, but it will be linked to the existing customer record. You should probably check the contact details since they may have changed.

6.2 What if I accidentally make a second contact record for the same person?

It is possible that two contacts have been recorded that refer to the same person. These two contacts should be merged so there is only one entry for the contact.

- Select the **Maintenance** tab from the *EMT* main window and click the **Validation Functions** button.
- Click the **Manual Merge** button.
- Select the first contact from the Contact one drop down list **or** key in the name of the contact.
- Select the second contact from the Contact 2 drop down list **or** key in the name of the contact.
- Click the **Merge** button.

A new contact will be created using the checked values. The original contacts will be deleted. The values that are the same in both the selected contacts are highlighted with a yellow background. All references to both the original contacts will be moved to the new merged contact.

There is also features here to search for duplicates automatically.

6.3 What if the enquiry is recorded outside the system?

You can process an enquiry received or submitted without direct interaction (e.g. an application form sent by email, web site, mail or fax) the same way you would handle a phone enquiry. It is critical for marketing analysis that every enquiry is recorded, along with a marketing activity. You can create the enquiry without a marketing activity and ask about it later by phone, or on your evaluation sheets and enter them later.

6.4 What if I don't have the customer name?

A previous enquiry can be located by searching for contacts based on their:

- First Name
- Last Name
- Address
- Telephone numbers
- Email address
- Company name.

Click the **Enquiry** button in the **Enquiry Search** window.

The system is much smarter when searching for names. The *EMT* system is aware of equivalent names (such as Robert, Rob and Bob). It also matches names that start differently but match later in the name, although the first letter is given a higher weighting for matching purposes.

EMT is also aware of the gender of common names and titles. For example, "Jo" will tend to match "Joanne" but not "Joe". "Ms A. Jones" will not be listed when searching for "Alan Jones" because the system knows that "Ms" indicates a female and the name "Alan" is (probably) male.

You can configure the system to look for a match at a specific level and adjust this as you gain experience searching your customer names.

To search for contacts using **company name, address, telephone numbers** or **email address**, select the search criteria from the yellow drop down list.

First Name	Last Name	Search Criteria
Mick		Student No is
		Company begins with
		Company contains
		Address begins with
		Address contains
		Phone number is
		Phone number contains
		Email begins with
		Email contains
		Enquiry No is

The contacts that meet the criteria are shown in results list.

6.5 What if a registration is cancelled?

To cancel a registration:

- Click the **Enquiry** button on the *EMT* main window to search for an enquiry.
- Click the **Registrations** button.
- Select the registration on the list.
- Click on the **X!** button and answer “**Yes**” to the popup prompt.

This will change the registration status to **Cancelled** and remove all student records. It will trigger the **RegoCancelled** event and any associated actions.

If you answer “**No**” to the popup prompt, it will try to delete all record of the registration. This should only be done when you do not need to retain any record of the registration (e.g. if it was accidentally recorded wrongly).

6.6 What if a student wants to move to another offer?

A student may elect to move to another offer, or be forced to move by the provider in case where two offers are to be merged to make viable numbers.

Offer Details Certificate IV in Forest & Forest Products (Harvesting) (FP140399) ? **Delete** **Close**
 Thu 02/02/2006 to Fri 15/12/2006 **Confirmed**

General **Content** **Registrations** **Actions** **Check List** **Sessions** **Results** **Evaluation** **Costs & NAS**

Registrations (Customers)		Students	
Vasko Campbell	1	Vasko Campbell	Paid
Kristen Renshaw (Timber Training)	1	Kristen Renshaw (Timber Training Pty Lt)	Paid
Hyuk Albert (Raine & Horne Beecroft)	1	Hyuk Albert (Raine & Horne Beecroft)	Cancelled
Kim Fung (Penguin Mews)	1	Kim Fung (Penguin Mews)	Paid
Peter Chan (The Aldy Group St Leonards)	1	Peter Chan (The Aldy Group St Leonards)	Paid
Maragaret Williams (Philip Evans Real Estate)	1	Maragaret Williams (Philip Evans Real Estate)	Paid
Elaine Allen (Timber Training Pty Ltd)	1	Elaine Allen (Timber Training Pty Ltd)	Paid
Eva Brunton (Cairns City Council)	1	Eva Brunton (Cairns City Council)	Paid
David Bretherton (Invision Group)	1	David Bretherton (Invision Group)	Paid
Stephen Bodlay (The Aldy Group)	1	Stephen Bodlay (The Aldy Group)	Paid
Rebecca Rasmussen (Qic Blacktown)	1	Rebecca Rasmussen (Qic Blacktown)	Paid
Zhongce Connors (Integrity Financial Group)	1	Zhongce Connors (Integrity Financial Group)	Paid
Chad Doueihy (William Inglis & Sons)	1	Chad Doueihy (William Inglis & Sons Ltd)	Paid
Karmel Henniker	1	Karmel Henniker	Paid
Fiona Ryan (Mckenzie Hall)	1	Fiona Ryan (Mckenzie Hall)	Paid
Ted Teye	1	Ted Teye	Paid
Alexandar Walker	1	Alexandar Walker	Paid
Peter Mallon	1	Peter Mallon	Paid

Move selected registrations to an alternative offer:

Current Bookings: Bookings

To move a registration to an alternative offer:

- Open the relevant **Offer Details** form.
- Select the **Registrations** tab.
- Select one or more registrations to be moved in the left list box.

- Select the alternative offer from the drop down box. You will see the details of the alternative offer, including the number of current bookings compared to the minimum and maximum students. Only **Available** offers of the same course will be displayed at first. Click the **Show All** button to list all available offers.
- Click the **Confirm Move** button. This action may trigger event actions for each registration that may prompt for confirmation.

UPDATE: In release 3 onwards, this form has been re-arranged with the **Move Registration** section at the top and some additional details of the proposed destination offer.

6.7 What if I need to create a special classroom offer for a company?

Use the **New Registration** button and select the **New Classroom Offer** option. Note that in this case, you may specify more than one student even if you don't yet know their names.

The screenshot shows a web browser window titled "Enquiry Mate for Trainers - [New Registration]". The main content area is titled "New Registration" and displays the following information:

- Customer:** ALLAN, Jialiang (with a search icon and the note "(The decision-maker. This need not be the same as the enquiry)")
- Course:** FPI40399 Certificate IV in Forest & Forest Products (Harvesting)
- Students:** 20
- Type:**
 - Pre-Scheduled Classroom Offer: Register one or more students into an offer which has already been scheduled and is available for new students.
 - New Classroom Offer**: Schedule a new classroom offer specially for this registration which may be made available to others. (This option is highlighted with a red box in the image)
 - New Individual Program: Schedule a new individual program such as an apprenticeship, traineeship or distance course.

At the bottom right of the form is a "Next" button. The status bar at the bottom of the browser window shows "435 contacts matched" and "NUM".

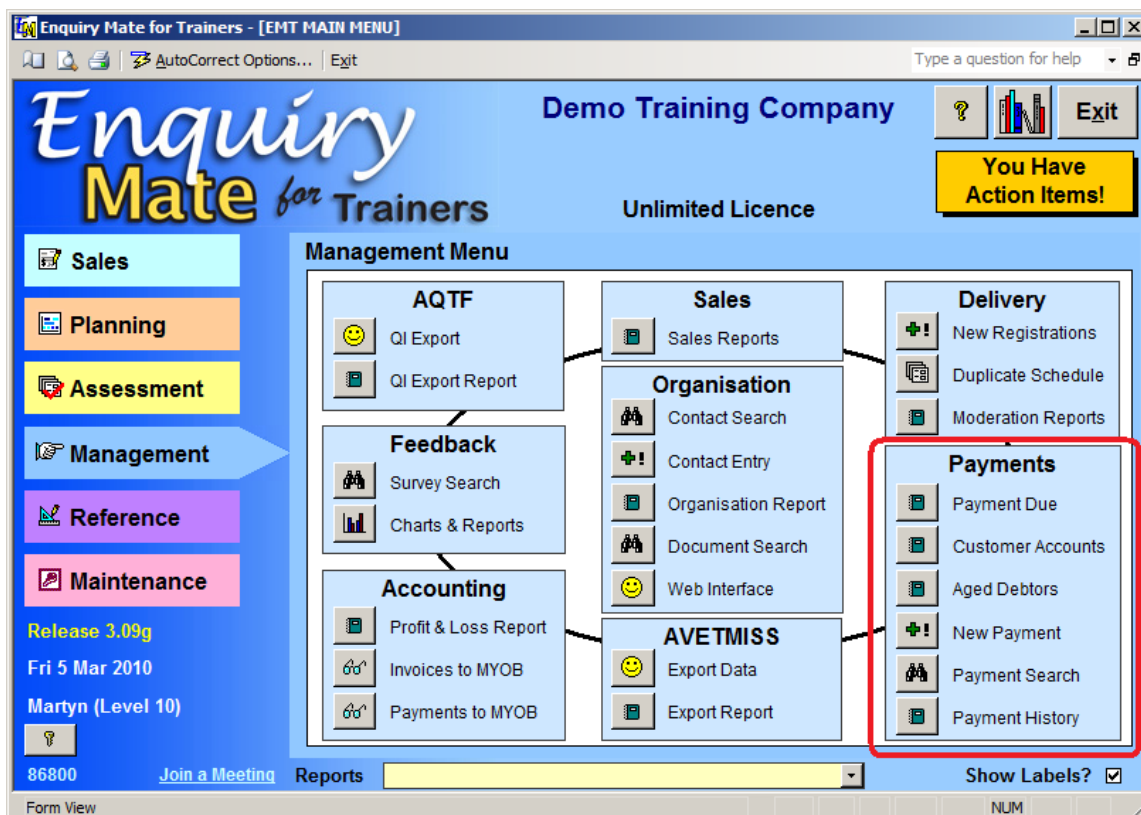
In the offer details form, the **Private** and **Customised For** fields are used to denote offers which are not available to the public and are being run specifically for a certain company. They have an **Offer Type** of "Classroom".

For individual programs, the private box is checked and the name of the student is shown in the **Customised For** field. They also have an offer type of "Assessment".

6.8 What if payment is deferred?

A contact may book an offer without paying in full. The New Registration form provides the option to record a partial payment, full payment or no payment. The Quick Rego drop-down also gives a simple “Has it been paid” popup prompt.

In either case, you can adjust the charges in the Registration Details form (Billing page) and any unpaid charges are tracked using the **Payment** functions on the **Management** menu.



You can enter new payments for a specific charge from within the **Charge Detail** form, or just use the **New Payment** function on the **Management** menu to enter payments as they are recorded. This may be based on bank statements, cheques received, cash receipts, etc.

7. Contacts

7.1 Searching for a Contact

7.1.1 Scenario

An operator is speaking on the phone to a teacher. To locate the teacher's details, the operator uses **search contacts** to locate the contact and the detail relevant to the teaching role.

7.1.2 Procedure

The **Search** functions on the Sales menu (Customers), Assessment menu (Students) and Management menu (Organisation) allows searching for a contact, as follows:

- Click the appropriate search function in the *EMT* main window. In the case above, we would use the **Management** menu **Search Contacts** button.

The system displays the **Contact Search** window.

Contact Search [?] [Cancel]

First Name [] Student No []
Last Name [] Match Level % [80]
Company []
Customer Type [] Export to AVETMISS?
Suburb []
Post Code [] To []
Industry []
Job Role []
Nick Name []
Member No [] To []
Golf Handicap [] To []
Graduation Date [] [] To [] []

Roles

- Customer
- Student
- Salesperson
- Teacher/Supervisor
- Assessor
- Location Manager
- Publisher

(Matches contacts who have ANY of these roles)

[Search]

- Enter the search criteria (if any). If no criteria fields are selected, then all contacts will be matched. This is not an efficient way to search but is still valid.
- Click the **Search** button.

If a single contact matches the criteria, the **Contact Detail** form will be displayed immediately. If there is more than one match, the **Contact List** form will be displayed. If there are a large number of matched, the system will prompt you to confirm that you want to list so many contacts.

If more than one field is entered then **all** of the criteria must match the result in the contact being displayed, except for the Roles. In the **Roles** column, check all roles that you wish to list. If more than one role is selected then contacts with any one or more of those roles will be matched.

The **Match Level %** field indicates how close contact names have to match the name criteria entered. The default value is set in the **System Settings** form. A value of 80 is appropriate for most medium-sized databases (say up to 5000 contacts) with a typical mix of mostly Australian names. If your market has a large number of short and common names, or you have over 5000 names on your system, you may find it useful to increase this to 90 to avoid too many false matches. You can change this once-off on this form or change the default.

UPDATE: The **Search All Roles** button ignores the roles criteria on the right, but is otherwise the same as the **Search** button.

7.2 Searching for a Contact (via Enquiry Search)

An alternative method to search for a contact is to use the Enquiry Search function. The enquiry search may be more familiar to operators and has the advantage of simplicity. The down-side is that you cannot search by as many fields and it can be a little less efficient.

7.3 Reviewing a Contact

7.3.1 Description

Each person can be marked with one or more roles, and the system will treat them accordingly. For instance, when the system requires a teacher to be specified, the list will show only those people with their "Teacher/Supervisor" checked.

The roles that a contact can have are:

- Customer
- Student
- Employer
- Staff
- Teacher/Supervisor
- Assessor
- Salesperson
- Location Manager
- Publisher

When a list is restricted in this way, there will be a **Show All** toggle button, which when depressed will expand the list to all contacts. If a contact is then selected in that role, that person will automatically be marked as being in that role in addition to any other roles they may have. It is possible to manually check and uncheck each role in the **Contact Details** form to control this behaviour if required.

7.3.2 Procedure

The details for a contact that has been assigned all the roles are shown in the window below. The pages for each role are visible only if the contact has been assigned that role.

The screenshot shows a web browser window titled "Enquiry Mate for Trainers - [Contact: ARNETH, Jodie]". The main content area displays the contact details for Jodie Arneth, ID C003119. The form is organized into several sections:

- Personal Information:** Title (Ms), First/Given Names (Jodie), Last/Family Name (Arneth), Salutation, Company (M Investments), Department, Position, License No, Industry, Job Role, Nick Name, Favourite Band, Member No, Golf Handicap, Graduation Date.
- Identification:** Student No (4119).
- Contact Information:** Mail Address (32 The Spinnaker), Suburb (PORT MACQUARIE), State (NSW), Post Code (2444), Country, Home Phone, Work Phone, Mobile Phone, Fax, Email (martyn@firststrike.com.au), Web Site, Logon Id, Password.
- Roles:** A section with checkboxes for Customer, Student, Employer, Staff, Teacher/Supervisor, Assessor, Salesperson, Location Mgr, and Publisher. The Customer and Student roles are checked.
- Other:** Home Phone, Work Phone, and Fax are checked. There is a "Contact Notes" field and an "Accepts Promotional Material?" checkbox.

At the bottom of the window, it indicates "39 contacts matched" and "NUM".

7.3.3 Custom Fields

Custom fields can be specified for contacts. There are ten custom fields which can be defined:

- Two category fields (e.g. **Member Type**)
- Four text fields (e.g. **Alternative Contact name & Phone No**)
- Two number fields (e.g. **Member No**)
- Two date fields (e.g. **Expiry Date**)
- Two memo fields (e.g. **Personal Interests**)

Custom fields are defined in the **System Settings** on the **Maintenance** tab, along with the category lists for the two category fields.

8. Events & Actions

8.1 Working with the Action List

An action list initially shows all uncompleted actions for the current user.

- Click the **Action List** button in the *EMT* main window.

EMT displays the **Action** window listing all the **incomplete** actions for the logged-on operator. Select from the **Sort By** drop down list the appropriate sort order.


Actions Sort By: Date (Oldest First) ? Show All Refresh Enquiry Edit Close								
Target Date	Who?	Action Type	Target Name or Company	Method	Notes	Status	Course (of related offer)	
Target Date						Not Completed		
10/11/2006	Martyn	NewRego	Joe Kerr (Cairns City Council)	E-Mail	New registration	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Chris	PaySchedule	Joe Kerr (Cairns City Council)	E-Mail	New registration	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentRemove	Joe Kerr (Cairns City Council)	E-Mail	Student removed from offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentReg	Joe Kerr (Cairns City Council)	E-Mail	Student registered in offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentReg	Adam Ayoub	E-Mail	Student registered in offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	StudentReg	Mary Lamb (Cairns City Council)	Standard Post	Student registered in offer	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	RegoReceipt	Joe Kerr (Cairns City Council)	E-Mail	RECEIPT	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
10/11/2006	Martyn	Invoice	Joe Kerr (Cairns City Council)	E-Mail	INVOICE	Late (6 days)	<input type="checkbox"/>	Basic First Aid (Forestry)
12/11/2006	Martyn	FollowUp	Joe Kerr (Cairns City Council)	Phone Call		Late (6 days)	<input type="checkbox"/>	

Record: 1 of 9

- Check the **Completed** check box to complete an action task.
- Double click an item (or click the **Edit** button) to edit an action.
- The Action Detail form is displayed.

UPDATE: The action list has been upgraded in release 3 onwards and includes additional filter options and explicit buttons to complete or delete one or more actions from the list.

The Action Detail Form

Action Detail AC000933		?	Send E-Mail	Preview E-Mail	Preview Letter	Close
Created	Fri 10/11/2006 10:56am					
Contact		Joe Kerr (Cairns City Council)	Enquiry Fri 10/11/2006 10:22am			
Email Address	martynw@firststrike.com.au		Registration Fri 10/11/2006 Deposit			
Preferred Contact	Work: (02) 9635 3949		Basic First Aid (Forestry) (FPIG37A)			
Action Type	NewRego		Offer Wed 20/12/2006 Classroom			
Form Letter	NewRego		Basic First Aid (Forestry) (FPIG37A)			
Contact Method	E-Mail					
Operator	Martyn					
Due Date/Time	Fri 10/11/2006 10:56am	← [Calendar] →	NOTE: Use future Due Date / Time to defer actions until a later date/time.			
Target Date/Time	Fri 10/11/2006 10:56am	← [Calendar] →				
	<input type="checkbox"/>		Status Late (6 days)			
Notes	New registration					

The buttons on the right can be used to view the related data items. Some actions will not necessarily be related to each data item, depending on the context in which they were created.

The action is shown on the email queue if the contact has an **Email Address** and the **Contact Method** has **Email Queue** checked.

The action is shown on the print queue if the **Contact Method** has **Print Queue** checked.

You can Preview, Print or Send the individual letter directly from this form.

An action may not require an outgoing communication. It may be completed by an administrative action, or by initiating a phone call, etc.

The action will be presented as a form letter if a **Form Letter** is selected. If not, the action may still be emailed or printed in a simple format containing the **Notes** and signed by the **Operator**.

UPDATE: The action detail form now includes a Customise button to enable you to take a snapshot of the standard form letter and then edit that specific letter. See the Help topic [?](#) on the **Customised Action** form for details.

8.2 Sending Email Actions

- On the **Sales** page in the *EMT* main window, click the **eMail Queue** button.
- The E-Mail Queue window is displayed.
- Click the **Start** button to begin sending emails one at a time. You can click the **Stop** button to stop the process after the current email is sent, or it will stop automatically when finished.

E-Mail Queue		Start	Stop	Stopped	To Send: 8	?	Close
Due Date	Recipient	E-Mail	Action Type	Form Letter			
10/11/2006	Adam Ayoub	Abacus Property Develc	marty@firststrike.com.au	StudentReg	NewRego		
10/11/2006	Joe Kerr	Cairns City Council	marty@firststrike.com.au	Invoice	Invoice		
10/11/2006	Joe Kerr	Cairns City Council	marty@firststrike.com.au	RegoReceipt	RegoReceipt		
10/11/2006	Joe Kerr	Cairns City Council	marty@firststrike.com.au	StudentReg	NewRego		
10/11/2006	Joe Kerr	Cairns City Council	marty@firststrike.com.au	StudentRemove	StudentRemove		
10/11/2006	Joe Kerr	Cairns City Council	marty@firststrike.com.au	PaySchedule	PaySchedule		
10/11/2006	Joe Kerr	Cairns City Council	marty@firststrike.com.au	NewRego	NewRego		
16/11/2006	John Smith	Derin & Derin Real Est	john@bigpong.com	InfoGeneral	InfoGeneral		

Actions are completed and date stamped automatically as they are sent and acknowledged by the outgoing email (SMTP) service. They are all retained as completed actions so that you have a record of what was sent and when.

Will I be blocked by my ISP if I send too many emails?

We can't guaranteed anything, but we have done everything we can to reduce the risk. The *EMT* system sends emails slowly and steadily (around 3 seconds apart), with a single recipient per email. This greatly reduces the chance of being identified as a "spammer" by your Internet Service Provider (ISP).

It also helps if you include plenty of fields in the email which will vary with each action, such as the customer's name and registration details, even if they are in a "small-print reference area" of the letter.

Ultimately, it is up to your ISP to determine what they consider "spamming", and for you to ensure that they do not exceed the bounds of the privacy legislation. Legally, sending relevant emails to your regular customers who have agreed to receive contact from you is perfectly ok, but providers have been known to ban businesses for less. It may be worth asking about your ISP's policies before sending a mass email to all of your customers.

8.3 Printing Action Letters

Some actions may require a printed letter, or you may not have an email address for some customers.

- On the **Sales** page in the *EMT* main menu, click the **Print Queue** button.
- The Print Queue window is displayed.
- Click the **Start** button to begin sending emails one at a time. You can click the **Stop** button to stop the process after the current email is sent, or it will stop automatically when finished.

Form Letter Queue		?	Export	Preview	Print	Close
Due Date	Recipient	Company	Action Type	Form Letter	Operator	
10/11/2006	Joe Kerr	Cairns City Council	StudentReg	NewRego	Martyn	
10/11/2006	Adam Ayoub	Abacus Property Developm	StudentReg	NewRego	Martyn	
10/11/2006	Mary Lamb	Cairns City Council	StudentReg	Invoice	Martyn	
16/11/2006	John Smith	Derin & Derin Real Estate	InfoGeneral	InfoGeneral	Chris	

Actions are completed and date stamped automatically as they are printed. They are all retained as completed actions so that you have a record of what was sent and when.

You can double-click an item in the queue to view the details of the action item, or Preview or Print a selected item manually.

8.4 What if somebody can't process their actions?

The action is your responsibility, but anyone can process the action. Try to arrange for someone else to process your actions (using the *responsibility* filter in the **Actions List** form).

8.5 What if I need to change or delete an action?

- Actions for an individual enquiry are shown on the **Contact Enquiry** window. When a contact is located, click on the **Actions** button to view all the action for the contact.
- An action can be deleted by clicking the **X!** button. This removes all record of the action, unlike a completed action which is retained on the system.

A list of all outstanding actions is obtained by clicking on the **Action List** button on the **Sales** page of the Main Menu. By using the filter criteria or the **Show All** button, you can find completed actions.

9. Mailing Lists

9.1 Extracting a Mailing List

Emails can be sent to selected contacts based upon:

- Enquiry information.
- Course or offer registrations. The selected contacts may be either the student or the customer.
- Incomplete or completed actions.
- Expiring certifications.

A list of contacts is created based on the selection criteria. New actions can be generated for every contact on the list with a specified form letter and contact method. If the email address is known, the selected action is added to the email queue. Otherwise, it is added to the print queue.

This list of contacts can also be exported to an Excel spreadsheet for use in external mail merge, or for use in other marketing activities.

UPDATE: *The Mail-Out Manager form has been changed in release 3.10 to enable additional options and manual control of the list.*

Who can I send emails to?

All of the search options contain the option to include contacts who have not agreed to receive promotional materials. You should consider privacy legislation when deciding whether to include these contacts in a mailing list.

If the communication is related to a current business relationship, you **may** have implied permission to send information related to that relationship. There are other conditions under which you may do so. It is important to document and consistently implement policies for checking this box.

We recommend the (only recently ratified) Australian Direct Marketing Association industry code of conduct as the best guide to responsible (and legal) direct marketing in Australia.

9.1.1 Based on Contacts

Mail-outs based on enquiries are useful for creating bulk mail-outs to cold-call customers. These may be names and email addresses gathered from public sources or purchased mailing lists. The query is based only on contact details, which is useful if the targets have not made any enquiry.

To do this:

- Click the **Mail Out Manager** button in the **Sales** page of the Main Menu.
- The Mail-Out Manager window is displayed.
- Enter search criteria in the **Contacts** page.

- Click the **Search** button.

9.1.2 Based on Enquiries

Mail-outs based on enquiries are useful for initiating follow-up contacts with **customers** who have enquired about courses but who may not have booked a course.

For example, you could Email all customers who live in Perth (defined by the post code range) and have enquired about your **Health Service Assistance Basics** course and booked on the course to inform them that your **Health Service Assistance** course will be offered soon in their area.

To do this:

- Click the **Mail Out Manager** button in the **Sales** page of the Main Menu.
- The Mail-Out Manager window is displayed.
- Enter search criteria in the **Enquiry** page.
- Click the **Search** button.

The status of an enquiry is considered Registered if there is a registration related to the enquiry for an offer of the selected course or subject area, even if it was subsequently cancelled.

9.1.3 Based on Course or Offer

Mail-outs based on course or offer details are useful for sending details of follow-up courses to **customers or students** who you have previously provided training to.

For example, you could email all students (or customers) who previously cancelled their booking on the offers of **Health Services Assistance Basics** that were due to run in the last 6 months of 2005, to inform them that another course is being run.

To do this:

- Click the **Mail Out Manager** button in the **Sales** page of the Main Menu.
- Click on the **Customers** or **Students** tab.
- Enter search criteria in the **Customers** or **Student** page.
- Click the **Search** button.

The screenshot shows the 'Mail-Out Manager' window with a blue header. Below the header are several tabs: 'Contacts', 'Enquiry', 'Customers', 'Students', 'Action', and 'Certification'. The 'Customers' tab is currently selected. The main area contains the following search criteria:

- Offer No**: A dropdown menu.
- Offer Status**: A dropdown menu.
- Start Date**: Two date pickers labeled 'From' and 'To'.
- Course**: A dropdown menu.
- Subject Area**: A dropdown menu.
- Rego Status**: A dropdown menu.

At the bottom left, there is a checkbox labeled 'Requires Promotional Material Consent?' which is currently unchecked. To the right of the checkbox is a 'Search' button.

9.1.4 Based on Actions

Mail-outs based on previous actions are useful for following up previous actions.

For instance, you could email all contacts who have been sent information about First Aid courses (identified by the **InfoFirstAid** action type) to tell them about a new course being offered in addition to those included in the document sent.

To do this:

- Click the **Mail Out Manager** button in the **Sales** page of the Main Menu.
- Click on the **Actions** tab.
- Enter search criteria in the **Actions** page.
- Click the **Search** button.

An **Action Status** of **Due Actions Only** includes actions not yet completed and due today or earlier.

An **Action Status** of **All Outstanding Actions** includes all actions which have not yet been completed.

9.1.5 Based on Certification

Mail-outs based on certifications are particularly useful in reminding past students that their certification is due to expire soon.

For example, you could email all contacts that have a First Aid certificate that is due to expire in the next 2 months, inviting them to renew their certification with your organisation.

To do this:

- Click the **Mail Out Manager** button in the **Sales** page of the Main Menu.
- Click on the **Certification** tab.
- Enter search criteria in the **Certifications** page.
- Click the **Search** button.

You can also search for contacts who do not hold a particular certification. This can be useful in finding likely students for higher level of certifications based on those who have the lower level certification but not the higher one. It can also be useful for identifying gaps in company OHS certifications.

Mail-Out Manager

Contacts
Enquiry
Customers
Students
Action
Certification

Search Option
 Certifications Expiring
 Certifications Issued
 Certifications Never Held

Expiry Date
 From
 To

Certification Held

Certification Type

Requires Promotional Material Consent?

9.2 Generating Actions

By creating a mailing list by any of the above criteria, we now have a list of contacts that satisfy the search criteria.

Action Generator

?
Close

Recipients 4194 actions

Name	Email Address	Mailing Address
Richard Ortencio (Creative Planners)	martynw@firststrike.com.au	Young St RANDWICK NSW 2031
Reginald Le (Self Employed)	martynw@firststrike.com.au	PO Box 477 RANDWICK NSW 2031
Eliza Do (The Aldy Group Queensland)	martynw@firststrike.com.au	10 Marine Parade MERIMBULA NSW 2548
Alexander Woods	martynw@firststrike.com.au	10 Marine Pde MERIMBULA NSW 2548
Kim Fung (Penguin Mews)	martynw@firststrike.com.au	24 Beach View Court TURA BEACH NSW 2548
Darren Van Der Linden (Elders Real Est)	martynw@firststrike.com.au	24 Beach View Court TURA BEACH NSW 2548
Nicole Thomas (Raine & Horne Blacktow)	martynw@firststrike.com.au	15-17 Ocean Dr MERIMBULA NSW 2548
Jutta Ide (Li & Fung Properties)	martynw@firststrike.com.au	12 Fishpen Rd MERIMBULA NSW 2548
Bernie Walton (Sunchip Transport Pty Ltd)	martynw@firststrike.com.au	12 Fishpen Rd MERIMBULA NSW 2548
James Skarrait	martynw@firststrike.com.au	P O Box 71 MERIMBULA NSW 2548
Stejeer Orlando (Business Accelerator Li)	martynw@firststrike.com.au	720/2 Lauchlan Street WATERLOO NSW 2017
Xichu Nguyen (Broadwalk Business Brok)	martynw@firststrike.com.au	347/317 Castlereagh Street SYDNEY NSW 2000
Charles Cashen (Raine & Horne Toukley)	martynw@firststrike.com.au	26 Farnell Street HUNTERS HILL NSW 2110

Action Type
Action Notes

Target Date/Time

Form Letter

E-Mail Method
<< When E-Mail address is available.

Other Method
Operator
Force Unique Contacts?

Action Notes

Xmas party invitations

To generate new actions based on the list:

- Click the **Generate Actions** button.

- Enter the search criteria. The criteria fields are explained below:

Action Type Select the action type. The contact method associated with the action type is *not* used. The contact method used is selected below.

Form Letter Select a form letter. A form letter is a standard letter that is created for the recipient. If a form letter is not selected, a default letter is printed.

E-Mail Method Select the contact method to be used if an email address is available for the contact.

Other Method Select the contact method to be used if the email address is not available for the contact.

Force Unique Contacts? A contact may have several actions or enquiries that meet the specified search criteria.

Checking **Force Unique Contacts** ensures that only one message is sent to each contact.

Alternatively, a contact may require an action to be generated for each registration (for example).

- Click the **Generate** button.

Actions will be shown on the email or print queues according to the contact method selected. Note that you need not generate actions that are emails or letters. You may want to phone all of your loyal customers and invite them to your Christmas party personally. You could generate actions with the Phone contact method and use the action notes to record whether they are planning on attending.

Session 3

(Delivery)

Classroom Training
Assessment Programs
Qualifications
Certifications

10. Classroom Training

10.1 Life Cycle of a Classroom Offer

EMT manages classroom-based offers through the following life cycle:

- Plan offers based on expected demand
- Publish the intention to run a course, subject to demand (optional)
- Receive enquiries and registrations (optional)
- Merge, move, reschedule or cancel the offer (optional)
- Decide whether to proceed with the offer
- Check that everything is ready to run the offer (optional)
- Print class lists, attendance sheets, evaluation sheets, etc
- Run the offer
- Record attendance & evaluation responses (optional)
- Enter the results (optional)
- Print statements of attainment (optional)
- Finalise the offer

It is also common for results & attendance to be progressively recorded during longer offers. The process of applying for a qualification is managed completely separately from the course offer (see later sections).

The following sections will show you how to manage offers through this entire life cycle, and how to handle exceptions that may offer.

Classroom offers and assessment-based offers are similar in many aspects, and much of this section applies equally to both types of offer.

10.2 Schedule Offers

- Click the **New Offers** button on the **Planning** menu.

The **Schedule New Classroom Offer** window is displayed.

Schedule New Classroom Offers [?] [Cancel]

Course [dropdown]
Start Date [text] [calendar icon]
Finish Date [text] [calendar icon]
Location [dropdown]
Teacher [dropdown]
Offer Status [Proposed] [dropdown]
Private Offer? [dropdown]

Repeating Pattern
Repeat every [text] [dropdown]
Until [text] [calendar icon]

[Save]

- Select the **Course** from the drop down list.
- Enter start and end dates. The end date will default based on the normal number of **Scheduled Days** for the course.
- If you know them at this stage, enter the location. If the location is new, type the name of it and a popup message will appear offering to add it to the list. When it does this, it will also create a site of the same name and link them.
- If know, select a supervising teacher. You can enter support teachers later.
- If the course is customized for an individual company, check the **Customised** check box, select a company from the **Company** drop down list and enter the **Quoted Price**.
- If you want to create a series of repeating offers (e.g. every 2nd Monday for the next six months) enter the appropriate options in the Repeating Patterns box. IF these fields are blank, a single offer will be created.
- Click the **Save** button. The system will ask whether you want to edit the details of the offer (or list them if there was more than one).

10.3 Finding an Offer

- Click the **Offer Search** button on the **Planning** menu.

EMT displays the **Offer Search** window.

The screenshot shows the 'Offer Search' window with the following fields and controls:

- Offer Type:** Dropdown menu.
- Offer No:** Text input field with a search icon.
- Offer Status:** Dropdown menu and an 'All Available Statuses?' checkbox.
- Course Code:** Dropdown menu.
- Employer:** Dropdown menu.
- Employer Ref No:** Text input field.
- Location:** Dropdown menu.
- Teacher:** Dropdown menu.
- Start Date:** Text input field, 'To', text input field, and calendar icon.
- Finish Date:** Text input field, 'To', text input field, and calendar icon.
- Funding Status:** Dropdown menu.
- Search:** Button at the bottom.

Note that all fields are optional.

Enter the search criteria. The following fields are explained in more detail.

All Available Statuses If checked then only offers that are available are shown (this is the default).

If unchecked, cancelled or completed offers may also be listed.

Start Dates If entered, then the course must **start** on or between the specified dates.

Finish Dates If entered, then the course must **finish** on or between the specified dates.

10.4 Editing a Classroom Offer

The offer details shows the course details and costs as well as the student registrations, check list, results and evaluation comments.

The **Offer Details** window is displayed.

The screenshot shows the 'Offer Details' window for 'Basic First Aid (Forestry) (FPIG37A)' with the status 'Confirmed'. The window has a tabbed interface with 'General' selected. The 'General' tab contains the following fields:

- Offer No:** C001001
- Students Paid:** Nil
- Status:** Confirmed (dropdown menu)
- Course*:** Basic First Aid (Forestry) (FPIG37A) (dropdown menu)
- Delivery Method*:** 01 College/campus-based (to 2006) (dropdown menu)
- VET In Schools Program?***
- Start Date*:** 12/12/2006 (calendar icon)
- Finish Date*:** 12/12/2006 (calendar icon)
- Teaching Days:** 1 (text input)
- Days Of Week:** (empty text input)
- Start & Finish:** 9:00am-4:00pm (1 hour break for lunch) (text input)
- Location*:** DTC Large Training Room (dropdown menu)
- Teacher (Supervisor):** Steven Rutherford (dropdown menu)
- Supporting Teachers:** John Kassiotis (dropdown menu)
- Price/Student*:** (empty text input)
- Inc GST?:**
- Teacher Contact:** 6 Hrs
- Coordination:** 2 Hrs
- Notes:** (empty text area)
- Customised?:**
- Company:** Rivergum Rydalmere (dropdown menu)
- Quoted Price:** \$3,200.00
- Inc GST?:**
- Training Type**:** (empty dropdown menu)
- Delivery Mode**:** (empty dropdown menu)

Enter the required information. The following fields are explained in more detail.

Days of Week and **Start/Finish Times** are free-format text fields. They contain descriptions of the days of the week and times of the day when the offer is run, for inclusion in the schedule and reports. They are often abbreviated. These fields do not interact with the fields on the **Sessions** page, which are used to generate sessions.

In the **Sessions** page, sessions may have automatically been generated. If not, they may (optionally) be generated manually by clicking on the **Create Sessions** button. You can also add, remove & edit individual sessions manually.

In the **Costs** page, the default values are automatically populated from the Course, System Settings, Location and Contact (Teacher) settings. They may be changed here to reflect actual costs and rates for this offer.

10.5 Confirming an Offer

Run the Classroom Offer Viability/Status report and determine whether the offer is viable.

Enquiry Mate Trainers		Classroom Offer Viability/Status by Date				Demo Training Company			
		Offers From 16/11/2006							
From	To	Course	Location	Status	Min	Max	Booked	Paid	
Thu 02/02/2006	Fri 15/12/2006	Certificate IV in Forest & Forest Products (Harvesting) (FPI40399)		Confirmed	1	20	17	17	
Fri 01/12/2006	Fri 01/12/2006	Basic First Aid (Forestry) (FPIG37A)	DTC Large Training Room	Proposed	1	12	0	0	
Fri 01/12/2006	Fri 01/12/2006	Basic First Aid (Forestry) (FPIG37A)	DTC Large Training Room	Published	1	12	0	0	
Mon 04/12/2006	Fri 08/12/2006	Owner Builders Certificate (OB1)		Proposed	0	0	1	0	
Tue 12/12/2006	Tue 12/12/2006	Basic First Aid (Forestry) (FPIG37A)	DTC Large Training Room	Confirmed	1	12	0	0	
Sat 16/12/2006	Sat 16/12/2006	Climb Small Trees (RUHHRT223A)		Proposed	1	12	0	0	
Wed 20/12/2006	Wed 20/12/2006	Basic First Aid (Forestry) (FPIG37A)	DTC Large Training Room	Confirmed	1	12	12	0	
Mon 01/01/2007	Mon 01/01/2007	Basic First Aid (Forestry) (FPIG37A)	DTC Large Training Room	Published	1	12	0	0	
Fri 02/02/2007	Sat 15/12/2007	Certificate IV in Forest & Forest Products (Harvesting) (FPI40399)		Proposed	1	20	0	0	

On the **Offer Detail** form, change the status to **Confirmed**.

10.6 Using the Offer Checklist

A standard check list for class room offers is provided. Each item should be checked and a reference for each item noted.

The **Offer Details** window is displayed.

- Select the **Checklist** tab.

Offer Details		Basic First Aid (Forestry) (FPIG37A)		Wed 20/12/2006 to Wed 20/12/2006		Confirmed		Delete		Close	
General		Content		Registrations		Actions		Check List		Sessions	
Results		Evaluation		Costs & NAS							
Check List Item	Required?	Done?	Reference								
Text books in stock	Yes	<input type="checkbox"/>		<div style="float: right; text-align: right;"> <p>Revert to Default Check List</p> <p>Print</p> </div>							
Room booked	Yes	<input type="checkbox"/>									
Evaluation forms Printed	Yes	<input type="checkbox"/>									
Attendance sheets printed	Yes	<input type="checkbox"/>									
Participants notified	Yes	<input type="checkbox"/>									
Trainer booked	Yes	<input type="checkbox"/>									
Trainer confirmed	Yes	<input type="checkbox"/>									
Lunch vouchers printed & signed	No	<input type="checkbox"/>									
Catering booked for final lunch	Yes	<input type="checkbox"/>									
Parking stickers issued	Yes	<input type="checkbox"/>									
Equipment booked	Yes	<input type="checkbox"/>									
Equipment checked and tested	Yes	<input type="checkbox"/>									
Check that any special dietary requirements are ok	No	<input type="checkbox"/>									
Set up & check operation of dummy	Yes	<input type="checkbox"/>									
Check stocks of masks	Yes	<input type="checkbox"/>									

For each completed task.

- Check the **Done** checkbox.
- Enter a note in the **Reference** field. Information regarding order numbers, suppliers and cost can be recorded.

- You can **Print** the list for use on a remote site or simply for convenience.

10.7 Recording Results

Results for students attending a class are recorded. The results for each individual student and module for the course are entered.

Student	Module	Result
Laura Conlon (Perma Log)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Jennifer Peters	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Jian Zhen Neelakandan (Farmorha)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
John Dickson (P J Partners Real Estate)	Apply Basic First Aid (FPICOR2206A)	NYC - Not Yet Cor
John McDonald (Raine & Horne Berry)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Christine Cremona (Ray White Blackhea)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
James Sweeney (Rural Real Estate)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Terry Smith (Goomboorian Transport Pty)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Russell Sullivan (Hawkins Property Corp)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Diane Jenkins	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Kerrie Sindrey (Raine & Horne Oatley)	Apply Basic First Aid (FPICOR2206A)	NYC - Not Yet Cor
Ping Kwei Bui (Raine & Horne Turramurr	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Oswald Williams (Bellevue Commercial)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Peter Collins	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Rosalind Snopek (Castlehaven Realtors)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Catherine May (Raine & Horne Port Step	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Stephen West (Cairns City Council)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Martin Hanna (Shire Real Estate Castle H	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Lucia Frangos (South Pacific Apartments	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Sagi Ng	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Terry Park (Cairns Urban Land Care)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Meredith Hibberd (Raine & Horne Bardwi	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Na Kus (Raine & Horne The Entrance)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent
Wayne O'Reilly (St George Real Estate)	Apply Basic First Aid (FPICOR2206A)	CMP - Competent

To enter results:

- Display the **Offer Details** window.
- Select the **Results** tab.
- If the list is empty, click the **Load Results** button to create a result record for every student for every module.
- If the list is not empty, clicking the **Load New Results** button will add result records for any new modules or students added to the course. Any existing results will not be affected.
- If the list is too long for convenience, use the yellow filter fields to restrict the list by student, module or result code.
- Select some or all of the results using the **Select All** button or by clicking on results in the list.

To quickly set result codes and dates, simply click on one of the result codes in the yellow box on the right to set all selected results to that **Result Code** and use today's date as the **Result Date**. This is appropriate for short courses where a detailed assessment regime is not required.

To enter detailed results, click the **Result Details** button to edit all selected results.

The **Results** window is displayed:

Result 1 of 1 Joe Kerr (Cairns City Council)
Apply basic first aid techniques (FPIG37A)

Overall Results | Exam | Class Work | Work Task

Overall Mark %: 50 Prof. Dev. Credits: Hours Attended* (Only if withdrawn)

Result*: CMP - Competent (Voca) Result Date*: 18/11/2006 Statement No: 000194

Funding Code*: Certification: FirstAid

Award/Renew Certification Preview Statement of Attainment Print Statement of Attainment

Notes

Printed?

The first page shows the overall result details for the module. The following pages show the results for each assessment task defined for the module.

Result 1 of 1 Joe Kerr (Cairns City Council)
Apply basic first aid techniques (FPIG37A)

Overall Results | Exam | Class Work | Work Task

Exam 50 % weighting

Received Date: 16/11/2006

Sent to Marker: 17/11/2006

Marker: Martyn Webster

Marked Date: 28/11/2006

Mark: 85 / 100

Delivered Date: 29/11/2006 Re-Mark

Marking History

Sent	Marker	Mark	Mark Date	Delivered
17/11/06	Martyn Webster	80/100	20/11/06	22/11/06

Notes

Enter the required information.

Overall Mark % is calculated as the weighted average of up to four assessment task marks. It may be overwritten, in case there is a more complicated calculation required.

Prof. Dev. Credits refers to the number of CPD points that the student is to be awarded as a result of this course. This may not be the full amount for a variety of reasons, including incomplete attendance.

11. Assessment Programs

11.1 Life Cycle of an Assessment Program (Offer)

In *EMT*, assessment based programs are stored as offers. In some respects they are very similar to classroom-based offers. However, there are some fundamental differences too. The most important difference is that they are created for a single student, and this cannot be changed once the program is created.

EMT manages assessment programs through the following life cycle:

- Create the program based on a student's application
- Update registration details (optional)
- Check that everything is ready to start the program (optional)
- Commence the program
- Schedule assessment visits
- Manage the results of assessment visits
- Enter results throughout the program
- Print statements of attainment (optional)
- Finalise the offer

The following sections will show you how to manage assessment programs through this entire life cycle, and how to handle exceptions that may offer.

Classroom offers and assessment-based offers are similar in many aspects and much of this section applies equally to both types of offer.

11.2 Creating an Assessment-Based Program

An assessment program for a student can be created and modified via the *Enquiry Detail* form.

- Display the contact details for the student undertaking the assessment.
- Ensure that the contact details are correct.
- Click the **New Registration** button.
- Choose the “New Individual Program” option and follow the remaining prompts.

New Registration KERR, Joe Q002185 ? Close
Lake Macquarie City Council

Select a Course

Customer: KERR, Joe (The decision-maker. This need not be the same as the enquiry)

Course: FPI40399 Certificate IV in Forest & Forest Products (Harvesting)

Students: 1

Type:

- Pre-Scheduled Classroom Offer**
Register one or more students into an offer which has already been scheduled and is available for new students.
- New Classroom Offer**
Schedule a new classroom offer specially for this registration which may be made available to others.
- New Individual Program**
Schedule a new individual program such as an apprenticeship, traineeship or distance course.

Next

11.3 Finding an Assessment Program

The process to search for assessment programs is the same as for classroom-based offers.

Offers for a student can also be located in the Registrations section of the Enquiry window. You also search for assessment offers on the **Planning** menu.

11.4 Editing an Assessment Program

The process to edit an assessment program is the same as for classroom-based offers.

11.5 Using the Assessment Checklist

A standard check list for assessment programs is provided, separate to the list for classroom offers. Each item should be checked and a reference for each item noted.

- Display the **Offer Details** window.
- Select the **Checklist** tab.

Program for Joe Kerr (Cairns City Council) ? Delete Close

General Content Actions **Check List** Assessments Results Costs

Check List Item	Required?	Done?	Reference
Training contract submitted	Yes	<input type="checkbox"/>	
Training plan finalised	Yes	<input type="checkbox"/>	
Training contract accepted by DET	Yes	<input type="checkbox"/>	
OHS inductions complete	Yes	<input type="checkbox"/>	
Site orientation complete	Yes	<input type="checkbox"/>	
Employer contact entered	Yes	<input type="checkbox"/>	
Half-way claim for submitted	Yes	<input type="checkbox"/>	
Half-way payment made	Yes	<input type="checkbox"/>	
Certificate issued?	Yes	<input type="checkbox"/>	
Follow-on course information sent to student?	Yes	<input type="checkbox"/>	
Final claim form submitted	Yes	<input type="checkbox"/>	
Final payment made	Yes	<input type="checkbox"/>	

Revert to Default Check List

Print

For each completed task.

- Check the **Done** checkbox.
- Enter a note in the **Reference** field. Information regarding order numbers, suppliers and cost can be recorded.
- You can **Print** the list for use on a remote site or simply for convenience.

11.6 Managing Assessments

The program of assessments for an individual student is designed with the allocation of assessors, locations and an assessment date and time.

11.6.1 Scheduling Assessment Visits

The **Offer Details** window is displayed.

- Select the **Assessments** tab.

Program for Joe Kerr (Cairns City Council) ? Delete Close

General Content Actions Check List **Assessments** Results Costs

Assessments +! X!

Mon	13/11/2006	Martyn Webster (First Strike Solution	Date/Time	25/12/2006 3:15pm	Completed?	<input type="checkbox"/>
Mon	25/12/2006	Martyn Webster (First Strike Solution	Assessor	Martyn Webster	Show All	
			Location	DTC Large Training Room		

Notes

The assessment program is displayed.

To add a new assessment to the program:

- Click the **+!** button.
- A **New Assessment Date & Time** window is displayed.

- Select the date from the calendar and the time by using the arrow buttons.

To edit an assessment:

- Select an assessment from the assessment list.
- Enter the required information. The changes will be recorded automatically.

The **Assessor** is a contact (with the teacher role) who manages the program. To show all contacts, click the **Show All** button. If selected as an assessor, a contact will be flagged in the role of **Teacher** automatically.

11.6.2 Finding Assessment Programs

- The scheduled assessment programs are found by clicking the **Assessment Program Search** button on the **Administration** page of the *EMT* Main Menu.
- The Assessment Program Search window is displayed.
- Enter the required search criteria.
- The assessment details are located on the **Assessment** tab of the assessment program window.

The **Student** details refer to the single student completing the offer.

The **Registration** details refer to the **customer** contact, who may be a representative of the student's employer.

Assessment Program Search [?] [Cancel]

Student Registration

Student No

First Name

Last Name

Company

First Name

Last Name

Company

NAS Contract

NAS Client

Offer Status All Available Statuses?

Course Name

Course No

Location

Start Date To

Search

11.7 Recording Assessment Results

Results for the student are recorded. The results and comments for each individual module for the course are entered.

To enter results:

- Display the **Offer Details** window.

- Select the **Results** tab.
- If the list is empty, click the **Load Results** button to create a result record for every student for every module.
- If the list is not empty, clicking the **Load New Results** button will add result records for any new modules or students added to the course. Any existing results will not be affected.
- Select some or all of the results using the **Select All** button or by clicking on results in the list.

To quickly set result codes and dates, simply click on one of the result codes in the yellow box on the right to set all selected results to that **Result Code** and use today's date as the **Result Date**. This is appropriate for short courses where a detailed assessment regime is not required.

Code	Description	Result Code
FPIG37A	Apply basic first aid techniques	CMP - Competent (Voc)
FPIH3020A	Harvest trees manually - intermediate	CMP - Competent (Voc)
FPIHAR2205A	Conduct mobile splitting operations	NYC - Not Yet Competent
FPIHAR3203A	Conduct crawler operations	NYC - Not Yet Competent
FPIHAR3204A	Conduct skidder operations	NYC - Not Yet Competent
FPIHAR3208A	Conduct boom delimeter operations	CMP - Competent (Voc)
FPIHAR3211A	Operate yarder	RPL - Recognition of Prior Learning
FPIHAR3214A	Operate a single grip harvester	CMP - Competent (Voc)
FPIHAR3215A	Operate a heavy production mobile chipper	CMP - Competent (Voc)
FPIHAR4202A	Coordinate log recovery (hook tender)	CMP - Competent (Voc)
FPIHAR4203A	Design log landings and snig tracks	CMP - Competent (Voc)
FPISAW3204A	Saw flitches and cants	CMP - Competent (Voc)
FPISAW3210A	File and set saws	CMP - Competent (Voc)
FPISAW3214A	Join band saw blades	CMP - Competent (Voc)

To enter detailed results, click the **Result Details** button to edit all selected results.

The **Results** window is displayed:

The first page shows the overall result details for the module. The following pages show the results for each assessment task defined for the module.

Result 1 of 1 Joe Kerr (Cairns City Council)
Apply basic first aid techniques (FPIG37A)

Overall Results Exam Class Work Work Task

Exam 50 % weighting

Received Date: 16/11/2006

Sent to Marker: 17/11/2006

Marker: Martyn Webster

Marked Date: 29/11/2006

Mark: 85 / 100

Delivered Date: 29/11/2006

Notes:

Marking History

Sent	Marker	Mark	Mark Date	Delivered
17/11/06	Martyn Webster	80/100	20/11/06	22/11/06

Re-Mark

Enter the required information.

Overall Mark % is calculated as the weighted average of the four assessment task marks. It may be manually overwritten, in case there is a more complicated calculation or assessment process is required.

12. Qualifications

12.1 Creating a Qualification Attempt

The details of an attempt by a student to obtain a qualification are recorded, usually as the result of a formal application process.

- Display the contact's details window.
- Ensure the student's role is checked.
- Click the **Students** page.
- The Qualification Attempt window is displayed:

John Smith
Derin & Derin Real Estate

? New Enquiry Delete Close

Primary Alternative Reference Statistical Customers Students Teachers Salespeople Locations Publishers

Qualifications Attempted & Completed (most recent first) New Attempt: [dropdown] [search]

Cert Issued	Qualification
	Forestry Industries - Technical (30223QLD) Diploma
	Forest Growing and Management (FPI30105) Certificate III
	Forest and Forest Products (Harvesting) (FPI30399) Certificate III
	Forest & Forest Products (Harvesting) (FPI40399) Certificate IV
	Forest & Forest Products (Harvesting) (FPI50399) Diploma

Current & Past Registrations (most recent first) [search]

Start Date	Course	Status
04/12/2006	Owner Builders Certificate (OB1)	Booked

School** [dropdown] (for VET in Schools Students)

- Select from the **New Attempt** drop down list, the attempted qualification.
- The selected qualification is added to the **Qualifications Attempted & Completed** list.

12.2 Recording RPL details

The information required for the recognition of qualifications obtained is recorded. For competencies that have previously been recognised, the issue date of the qualification and the company issuing the qualification is recorded.

- Click the **Sales** page in the *EMT* main window.
- Click one of the **Search Contacts** buttons.
- Search for the student undertaking the Assessment program.

- Ensure that the role **Student** is checked.
- Click the **Students** page.
- A list of qualifications (attempted & completed) and a list of registrations is shown.
- Select a qualification attempt and click the **Find** button to display details of the qualification attempt.

Qualification Attempt Adams, Kathleen (Department of Immigratic) ? Delete Close

Qualification: **THT40302** Tourism (Guiding)

Supervisor: Apply Date:

Certificate No: Date: **Issue**

Name Shown: Printed?

Preview Transcript **Print Transcript** **Preview Certificate** **Print Certificate**

Add new competency to list: 3 electives required **Request RPL** ? !

Status	Competency	Description	Result	Result Details	Result Date
Core	THTTC001B	Develop and update tourism indu	Competent	Classes: 31/1 2/2006 Tour Guide - Complete	
Elective	THTFTG01B	Work as a guide	Competent	Classes: 31/1 2/2006 Tour Guide - Complete	
Elective	THTFTG02B	Offer arrival and departure assist	Competent	Classes: 31/1 2/2006 Tour Guide - Complete	
Elective	THTFTG03B	Develop and maintain the general	Competent	Classes: 31/1 2/2006 Tour Guide - Complete	
Elective	THTFTG04B	Co-ordinate and operate a tour	Competent	Classes: 31/1 2/2006 Tour Guide - Complete	
Elective	THTFTG05B	Lead tour groups	Competent	Classes: 31/1 2/2006 Tour Guide - Complete	
Elective	THTFTG06B	Prepare and present tour commel	Competent	Classes: 31/1 2/2006 Tour Guide - Complete	
Elective	THTFTG07B	Research and share general infor	Withdrawn	Classes: 31/1 2/2006 Tour Guide - Complete	
Elective	THTFTG08B	Interpret aspects of local Australia	Withdrawn	Classes: 31/1 2/2006 Tour Guide - Complete	
Elective	THTFTG11B	Manage extended touring program	Credit Transfer	Classes: 31/1 2/2006 Tour Guide - Complete	
Elective	THTFTG12A	Prepare specialised interpretive c	Competent	Classes: 31/1 2/2006 Tour Guide - Complete	

To add RPL details for one or more competencies:

- Select one of the competencies (where the result is **None**) and click the **Request RPL** button. The RPL Details window is displayed.

RPL Details R000001 ? Delete Close

RPL Details

Student: **Adams, Kathleen**

Reference:

Apply Date:

RPL Type: **RPL**

Company:

Issue Date:

Acceptance

Assessor:

Accepted Date:

Remarks

Competencies Add competency: !

THTTC001B | Develop and update tourism industry knowledge

Enter the required RPL information.

Reference is optional, and may be used to uniquely identify the application.

Apply Date is the date on which the RPL was applied for.

RPL Type is the type of prior learning being recognised:

- **Credit Transfer** is when one institution has a formal agreement to recognise the training of another institution, including an RTO, TAFE, University, School or Company.
- **RPL** (in the more specific context) is when a nationally recognised qualification or statement of attainment from another RTO is being recognised.
- **RCC** is when your organisation assesses the ability of the student against the national standard to determine whether the student has the skills and knowledge required. This is usually due to work or life experience or training from an unrecognised overseas institution.

Company is the training organisation which delivered the prior education and whose documentation is being recognised (if any).

Issue Date is the date that the prior education was certified (such as the issue date of a certificate or statement of attainment). It may not be applicable for non-formal education.

The **Accepted Date** is the date on which you agree to recognise that the student is competent in the competencies, whether by accepting documentation or assessing current skills and knowledge. Entering a date here indicates to the system that the RPL process has been successful.

If it is determined that the student does not have the required skills, then the Accepted Date should be left blank and appropriate remarks recorded. Alternatively, you could delete the attempt and make the remarks in the **Qualification Attempt** detail **Notes** field.

To add a new competency to the competency list, select a competency from the yellow drop down list.

12.3 Awarding Qualifications

The process of awarding a qualification requires the direct input of a suitably qualified and certified representative. Because the rules regarding standards of assessment are subject to expert judgment and audit, the process cannot be automated. Instead, the system provides the assessor with all the known information about the qualification attempt, and facilitates the award process.

A certificate showing the qualification can be printed with the company logo as well as the national and state accreditation logos.

- Click the **Sales** tab in the *EMT* main window.
- Click one of the **Search Contacts** buttons.
- Search for the student undertaking the Assessment program.
- Ensure that the role **Student** is checked.
- Click the **Student** tab.
- A list of qualifications (attempted and completed) and a list of registrations is shown.

- Select a qualification attempt and click the **Find** button to display details of the qualification attempt.

Qualification Attempt ADAMS, Kathleen (Department of Immigrati) ? Delete Close

Qualification: THT40302 Tourism (Guiding)

Supervisor: Apply Date:

Certificate No: X3639 Date: 28/06/2006 Issue

Name Shown: Adams, Kathleen Printed?

Preview Transcript Print Transcript Preview Certificate Print Certificate

Add new competency to list: 3 electives required Request RPL

Status	Competency	Description	Result	Result Details	Result Date
Core	THTTC001B	Develop and update tourism indu:	RPL Accepted	Eco Tours 01/06/2006	01/06/06
Core	THTTC001B	Develop and update tourism indu:	Competent	Classes: 01/05/2006 Tour Guide - Complete	
Elective	THTFTG01B	Work as a guide	Competent	Classes: 01/05/2006 Tour Guide - Complete	
Elective	THTFTG02B	Offer arrival and departure assista	Competent	Classes: 01/05/2006 Tour Guide - Complete	
Elective	THTFTG03B	Develop and maintain the general	Competent	Classes: 01/05/2006 Tour Guide - Complete	
Elective	THTFTG04B	Co-ordinate and operate a tour	Competent	Classes: 01/05/2006 Tour Guide - Complete	
Elective	THTFTG05B	Lead tour groups	Competent	Classes: 01/05/2006 Tour Guide - Complete	
Elective	THTFTG06B	Prepare and present tour commer	Competent	Classes: 01/05/2006 Tour Guide - Complete	
Elective	THTFTG07B	Research and share general infor	Competent	Classes: 01/05/2006 Tour Guide - Complete	
Elective	THTFTG08B	Interpret aspects of local Australia	Competent	Classes: 01/05/2006 Tour Guide - Complete	
Elective	THTFTG11B	Manage extended touring program	Credit Transfer	Classes: 01/05/2006 Tour Guide - Complete	

Enter the required information.

You can add a new competency to the competency list by selecting a competency from the yellow drop down list.

The **Apply Date** is the date the student applied for the qualification.

The **Competency Requirements** and **Notes** fields are for use by the **Supervisor** in managing and documenting the assessment process.

The **Certificate No** uniquely identified the certificate. Depending upon System Settings, a sequential number is assigned to each certificate **or** the certificate number can be allocated & entered manually. To issue a certificate showing the student's qualification certificate, click the **Issue** button. The certificate will initially be marked as not printed.

EMT does not validate whether the requirements of the Qualification have been met. That is the responsibility of the supervisor of the attempt (in practice) and ultimately, the management representatives of the RTO.

The **Name Shown** on the certificate is the Formal Name of the student (if present). Otherwise, the First Name and Last Name is shown. This name can be modified here.

Click the **Print Certificate** or **Preview Certificate** button to print or preview a certificate for the qualification.

Click the **Print Transcript** or **Preview Transcript** button to print or preview a transcript for the qualification.

Certificates and transcripts can be printed individually here, or can be printed in batches using the **Print Certificates** function on the main menu. If the Printed check box is unchecked, the attempt will appear on the list for printing. Once printed, this check box will be set automatically, but you may uncheck it to allow automatic re-printing of the documents.

If the qualification is a nationally recognised short course, then a **Statement of Attainment** will be printed instead of a certificate, which indicates completion of one or more competencies, potentially leading to a national qualification.

13. Certifications

13.1 Defining Certification Completion

The system may contain any number of named certifications. Each module may be configured to lead to the issue or renewal of an expiring certification.

Each certification may also specify an (optional) category that applies to the certification. This can be configured through the certification type and may include a particular class of equipment, a particular site, type of operations or level of certification.

13.2 Issue/Renew a Certification

When the competent result is set in the results form for such a module, the system will issue/renew the certification for each student.

Result 1 of 1		Joe Kerr (Cairns City Council)	
		Apply basic first aid techniques (FPIG37A)	
Overall Results	Exam	Class Work	Work Task
Overall Mark %	50	Prof. Dev. Credits	
Result*	CMP - Competent (Voca)	Result Date*	16/11/2006
Funding Code*		Award/Renew Certification	
Certification	FirstAid		

The record of the certification is retained so that it may be reprinted or manually edited.

- Click the **View Current Certification** button to view the details of the certification.

Certification Awarded		?	Delete	Close		
Name	<input type="text" value="Peter Chan (The Aldy Group St Leonards)"/>					
Certification	RELIC Real Estate License					
Category	<input type="text"/>	Certificate Details				
Expiry Date	29/12/2007	External?	<input type="checkbox"/>	Certificate No	C000207	Issue Certificate
Assessor	Martyn Webster	Issue Date	29/12/2005	Printed?	<input type="checkbox"/>	
Remarks	<input type="text"/>	Name Shown	Peter Chan			
		Preview Certificate	Print Certificate			

Note that the category label for First Aid is *Level*, which has been configured as the category field for **First Aid** certifications.

If the **External** check box is ticked, the form changes to contain details relevant to externally issued certifications.

UPDATE: Release 3 onwards allows automatic creation of reminder actions. It can also manage the issue of when a customer has already booking into a refresher course and thus doesn't need a reminder.

If you are delivering first aid courses or any course where one course (e.g. "Apply First Aid") has an embedded requirement to have interim refreshers (e.g. for the "CPR" component of "Apply First Aid") then please talk to us about the best way to configure the reminder system.

13.3 Using Certification Data

Probably the most valuable use of these records is to use approaching expiry dates to generate mailing lists to assist in the marketing refresher courses. You can also do general searches and edit the details on an ad-hoc basis as required.

Manual Use of Certifications

As well as keeping track of certifications that you have issued, you can use certifications to record and manage **any process that expires** and which you need to record and keep current.

One of the most strictly audited requirements of the AQTF is that an RTO maintain up-to-date records of their **assessors' qualifications**. You can manually create, edit and report these by setting up the TAA as a certification and manually maintaining these records for your assessors.

Other potential uses of certifications include to record insurance details (of your organisation, sub-contractors & venue providers), training package licenses, vehicle licenses, etc.

We can assist you in configuring the system to handle this data.

Session 4

(Administration)

Attendance

Absence Notification

Evaluation Surveys

Customising Certificates

14. Attendance

14.1 Modifying Session Details

Sessions may be automatically generated when an offer is scheduled by checking the **Attendance Tracked** check box and setting up the days and times in the **Course Details** form.

Sessions may be added and modified from the **Offer Details** window (Session page). Attendance, session notes, location and teacher may be recorded for each session.

To add or modify session details:

- Click **Offer Search** on the Main Menu to locate the classroom offer, or locate the offer via a registration in the **Enquiry Detail** form.
- Select the **Sessions** page on the **Offer Details** form.
- Sessions may be added, modified or deleted.
- You may also generate sessions automatically, and the system will create any sessions that do not already exist and will leave those that do.

You can manually create more than one session for a particular day, or delete individual days from a long schedule to allow for holidays affecting the course.

Editing Sessions

You may adjust details of a session, including the date and time if adhoc adjustment of the sessions during the course is required. Each session is uniquely identified however, so it is unwise to move a session to another day or time **if** attendance has already been recorded. This could lead to incorrect attendance records.

Sharing Sessions

When sessions are generated for an offer, EMT checks whether there is already a session in the system with the same **Location** and **Time Slot**. If there is, the offer will share the same session as the other offer. When daily class lists are generated for this session, students from both offers will be shown. When attendance is entered, all students will be entered together.

This enables (for instance) Certificate IV level students to attend the same sessions as Diploma level students for the modules common to both courses. Note that it is the Timeslot code that is used to check this, not the start or finish times, so if this is a normal situation for your organisation, you should use timeslots to allocate session times.

You may also explicitly select a session of another offer to add to the offer you are editing. This enables you to select exactly which sessions will be shared.

This is useful if a session of one offer is cancelled for some reason and you want the student (or students) on that offer to "sit in" on the equivalent session of another to cover the required content.

Taking this flexibility to the limits, you could use this method to manage adhoc allocation of sessions for individual students. You would schedule a repeating cycle of offers and allocate locations, teachers and modules to sessions as required. You could then register students on individual offers, and manually allocate each session for each student.

14.2 Entering Attendance

Attendance details are recorded for a session.

To enter attendance details:

- Click **Enter Attendance for Recent Sessions** on the main Menu to display a list of sessions which have not yet been fully entered and are past the current date.
- Select the required session and click the **Attendance** button.
- Select the required students and click the appropriate attendance code from the yellow list.

Session Attendance [?] [Close]

Mon 05 Jun 2006 Tour Guide - Complete (TGFULL) C000001

Teacher Quain, Mick (Demo Training) Session Times
Location Demo Training Co

Student	Company	Attendance	Comments
Harding, Richard		PRESENT	

[Select All] [Select None]

Set Attendance To:
 ABSENT
 EARLY
 LATE
 PART
 PRESENT

[Edit Details] [Data Entry Complete]


Session Notes

The **Session Notes** box is used to record notes about the session overall, including general attendance and any issues affecting quality of service.

When a code has been recorded against every student for the session, the green **Data Entry Complete** message appears (as shown). Once this occurs, the session will no longer appear on the **Recent Sessions** list, but it may still be found via the **Offer Details** form.

14.3 Entering Attendance Details

- To enter additional attendance details, select one or more students and click the **Edit Details** button.

Attendance for Student 1 of 1		?	←	→	Close
Mon 05 Jun 2006	Tour Guide - Complete (TGFULL)	C000001			
	 Harding, Richard				
Actual Student	<input type="text" value=""/>	<small>(Only enter if different to booked student shown above. You can type the name of a new student if they are not on the database already. Use the format shown in the list for the new name)</small>			
Attendance Code	<input type="text" value="PRESENT"/>	Absences Reported To Date		0 %	
Attendance Comments	<input type="text"/>				

You can also record the **Actual Student** name, in case a student has been substituted since the booking was made, or if the student is currently unknown (TBA).

When recording attendance, you can also record text to describe the reason given, documentation provided or circumstances. This enables you to build a complete picture of each student's attendance record.

Student attendance records may be reported using the **Student Attendance** report.

15. Absence Notification

Absence notification only occurs if the student has an **Absence Reporting** selected in his Contact Details (**Alternative** page).

This is typically used only for overseas students studying on student visas, where the RTO has an obligation to report poor attendance (as required in the ESOS act). In this case, you would choose the “Percentage of hours” method.

You may however want to use this feature to manage student welfare issues, or to notify an employer when a student is not attending classes. You may use the “Number of session absent” which tracks the absence value of each attendance code and raises events at two defined levels.

An absence notification event is triggered when:

- A student has not started a course and is absent for the number of days specified for the **Non starting warning notification** in System Settings (**NonStartWarning** event).
- A student has not started a course and is absent for the number of days specified for the **Non starting report notification** in System Settings (**NonStartReport** event).
- A student (on “percentage of hours” method) is absent for 5%, 10%, 15%, 20%, 25% or 30% of the hours of a course (**Absent05**, **Absent10**, **Absent15**, **Absent20**, **Absent25** & **Absent30** events).
- A student (on “number of session missed” method) exceeds one of the two defined limits (**AbsenceWarning** and **AbsenceReport** events)

Actions with the appropriate form letters can be configured to warn the student and to initiate the process of reporting the situation to the appropriate authorities.

An absence event will only occur if the current level or reporting is lower than the level achieved to date. Thus, each event should only occur once for each student unless the current absence reporting level is adjusted manually. Non-starting warnings are considered equivalent to 1% absence, and reporting is 2% for purposes of this mechanism. The sessions missed warning and report events are equivalent to 3% and 4% for event priority purposes.

16. Evaluation Surveys

16.1 Printing Evaluation Surveys

To print the evaluation survey for selected offers:

- Click the **Class Lists** button on the **Planning** menu.
- Select the criteria for the required offers.
- Select one of the “Survey” formats on the Report Format list.

You may want to print these prior to offer commencement, at the same time as attendance sheets, class lists and perhaps certificates of attendance to provide the teacher with all of the documentation for the offer at one time.

16.2 Recording Evaluation Responses

The facility is provided to allow you to record evaluation results and comments for a **classroom** offer. The main aim of this process (apart from complying with the AQTF requirements) is to identify customer service problems and correct them.

The screenshot shows a software window titled "Evaluation Entry" with a blue header bar containing a help icon and a "Close" button. Below the header, the "Offer No" is set to "C000002" with a "Show All" button next to it. The date "01/08/2006" and the offer name "Tour Guide - Complete (TGFull)" are displayed. A section titled "Evaluation Responses" with a red "X!" icon and an "Add Response" button is visible. The current question is "Question 1 of 3" with an "Overall" label. The question text is "How would you rate the course overall?". Below the question, there are up and down arrow buttons and a "Response" dropdown menu currently set to "0: No response". A text area for "Any Other Comments?" is present. At the bottom, there is a checkbox for "Accepts Marketing Materials?", a "Name:" dropdown, a "Follow-Up Action" dropdown, and "Save" and "Cancel" buttons.

To enter the results of evaluation surveys:

- Click **Enter Responses** button on the **Planning** menu.
- The **Evaluation Entry** window is displayed.
- Select the Offer from the drop down list. If the **Show All** button is up, then only those offers that are **not finalised** and have the **finish date as today or prior to today** are shown.
- Click the **Add Response** button.

Perform the following steps to enter the responses for each survey.

- For each question in the questionnaire, select a response from the drop down list. After the response has been entered, the next question is shown. You may step through the questionnaire by clicking the arrow buttons.
- After the last response is entered, additional comments, the student's actual name and follow-up actions may be entered (all optional).
- Click **Save** to record the responses.

You can also enter the responses using only the keyboard. With some practice, the data entry process can be very fast.

There is also the opportunity to record permission to send promotional materials to the student, at the point when trust and acceptance is highest (hopefully).

How are follow-up actions handled?

The system provides a convenient mechanism for managing customer service issues. When one or more students make a negative comment, select an appropriate action in the yellow Follow-Up Action box. This is an action type that you should configure to be assigned to an appropriate manager for action.

If you enter any level 1 (the worst) response to a question, the system will prompt you to create an action since the student has clearly identified some dissatisfaction with the service. You may ignore and skip this warning if you choose to (you may have already raised the action).

These follow-up actions are processed like other **Actions** in the system, and they may involve a communication to the student or customer. We do not recommend any automated response in these cases, as a direct personal response is more effective in addressing customer service issues.

17. Customising Certificates

17.1 Overview

Certificates are defined in the **Reference** menu using the **Document Layouts** function. Which layout is used for a given context depends on the most specific setting as follows:

Qualification / Transcript	Statement of Attainment	Certification	Cert. of Attendance / Group Cert.
Attempt Detail	-	-	-
Qualification	Course	Certification	Course
System Settings	System Settings	System Settings	System Settings
None	None	None	None

The first non-blank selection is used In each case, so you only need to set a specific layout when the System Settings layout is not sufficient.

17.2 Customised Document Layouts

Document layouts are edited using a document editor that is simple to use and has a wide range of formatting features, as shown below:

You can select fields to insert into the document, very much like a mail merge template in MS-Word.

The format behind the graphical document is HTML – the language used to create web pages – and you can edit this code directly if you know how. We offer the service of converting your existing documents into this format for you as part of our implementation services, so you may not need to do this yourself.

Document Layout [?] [Print Test] [Duplicate] [Close]

Type: Statement of Attainment
 Description: Basic Statement of Attainment (System Default)

DOCUMENT DETAILS

- Student Name
- Statement Date
- Statement No
- Training Package Code
- Training Package Name
- Qualification Code
- Qualification Title
- Qualification Type
- Qualification Name
- Module No
- Module Name
- "as part of..." Text
- Competency Codes
- Competency Names
- Result Code
- Result Description

MAILING ADDRESS

- First Name
- Last Name
- Student No
- Company
- Department
- Position
- Address 1
- Address 2
- Suburb
- State
- Post Code
- Country

AUTHORISER

- Authoriser Name
- Authoriser Position

SYSTEM

- Current Date
- Current Time

Demo Training Co

Demo Training Company Pty Ltd
 ABN 99 999 999 999

National Provider No 99999

Statement of Attainment

This is to certify that

[StudentName]

Statement No [StatementNo]

has been assessed as having fulfilled the following requirements:

[SofACompetencyCodes][SofACompetencyNames]

The document types are based on different data items in *EMT* as shown in the table below. You will find the controls regarding each document type on the appropriate detail form.

EMT allows you to name and define layouts for various documents used within the system. You can then select a default layout for each type and also specify a particular layout applicable for the content of the document to as shown below:

Session 5

(Performance)

Marketing Analysis

Sales Performance

Evaluation Surveys

Financial Analysis

Teaching Resources

Training Locations

Text Books

18. Marketing Analysis

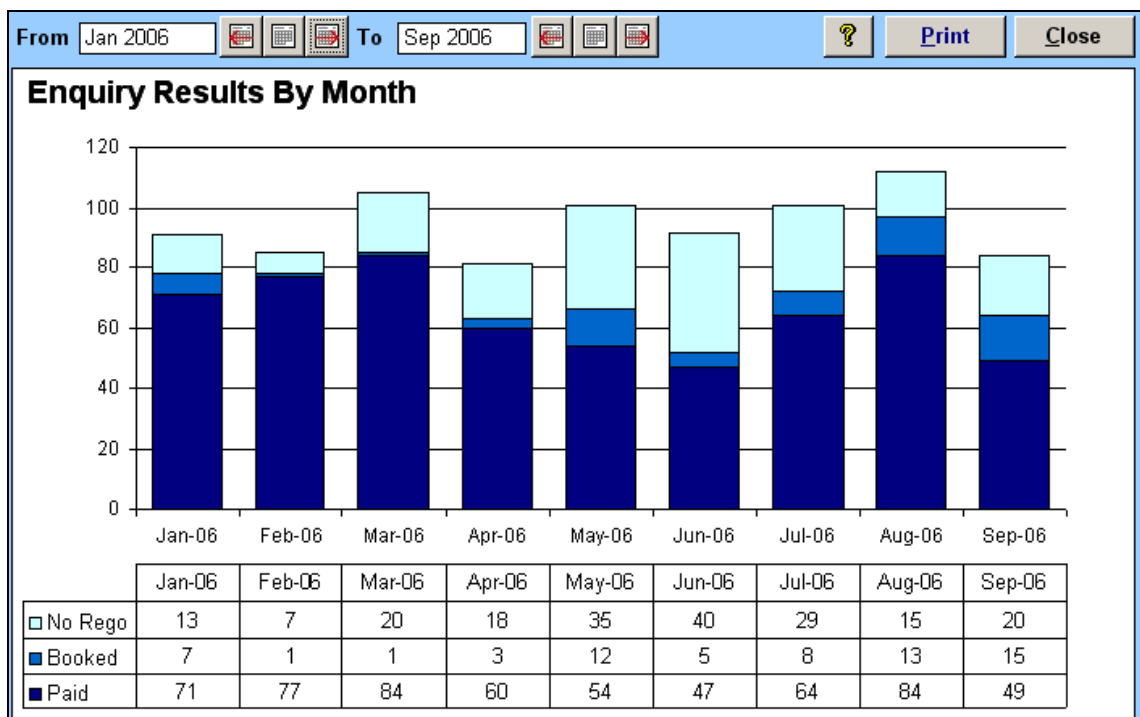
18.1 Marketing Reports

Report and graphs to show the effectiveness of marketing campaigns and activities are available.

The graph shows the number of enquires as well as the number of enquiries resulting in booked and paid enrollments.

The reports show the number of enquires as well as the number of students who have booked and paid.

Select the **Reports** tab from the *EMT* main window.



The usefulness of this analysis depends entirely on the quality and completeness of the data collection. We strongly suggest that you integrate the collection of this data into your daily procedures.

These graphs are based on the Marketing Activity recorded against enquiries, and the associated campaigns and types of those activities. We suggest that you set up permanent activities for ongoing marketing channels under a few permanent campaigns, as well as a campaign to cover the advertising and promotions for each semester or year.

19. Sales Performance

19.1 Reporting Sales

A salesperson is a contact who has the **Salesperson Role** checked.

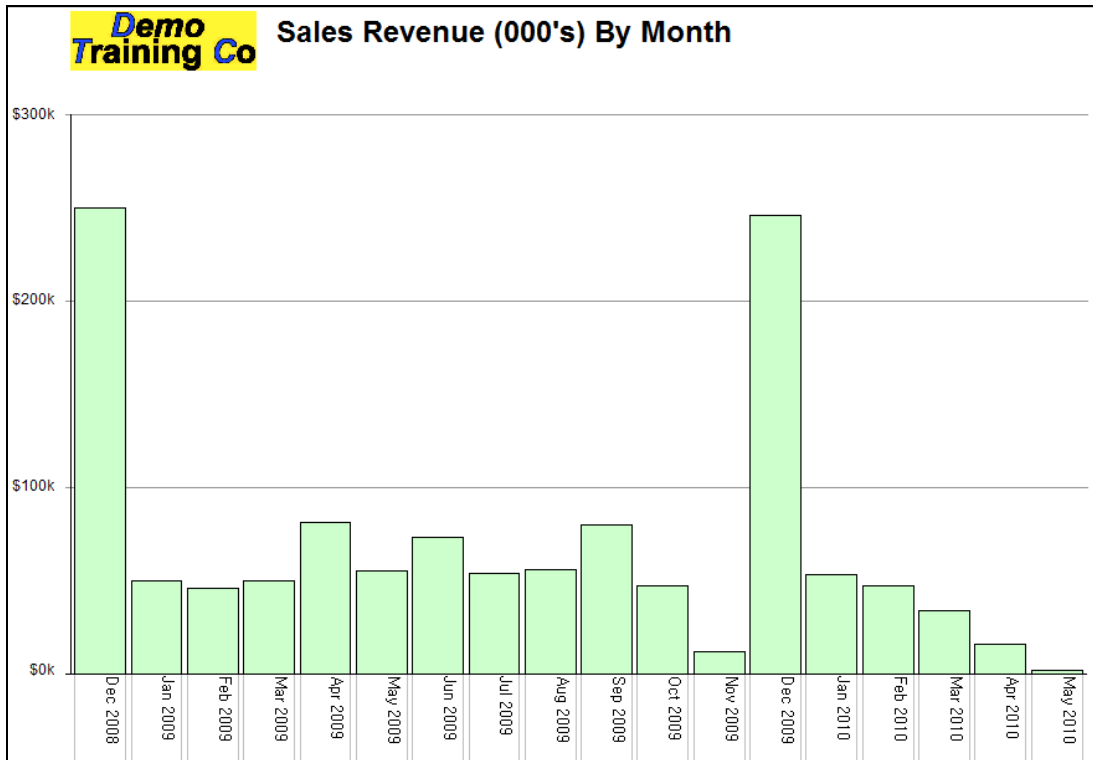
A number of reports are available that detail the sales and commissions for salesperson and sales territory.

- Click the **Sales Reports** button on the **Management** menu.
- The **Sales Reports** window is displayed.

- Select the criteria for the report and the report format.

Enquiry for Mate. Trainers		Sales Details			Demo Training Company	
Sales Territory: Newcastle and Hunter Valley						
Salesperson: Margaret Moore						
Registration	Contact			Commission		
Date: 31/03/05	Raymond Adams	Home:	<input type="checkbox"/> (02) 8329 2673	Type:		
Status: Paid	19 Sandringham Avenue	Mobile:	<input type="checkbox"/>	Amount:		
Date Paid: 31/03/05	THE BASIN NSW 2207	Work:	<input type="checkbox"/> (02) 5569 2003	Student:	1	
Amount: \$500.00		Fax:	<input type="checkbox"/>			
Course: HSAI	Health Service Assistance	Email:	<input type="checkbox"/> mail@matetrainers.com.au			
TOTAL FOR Margaret Moore				Sale:	\$3,700.00	Commission: \$160.00
Salesperson: Mick Guain						
Registration	Contact			Commission		
Date: 21/03/05	Leo Anderson	Home:	<input type="checkbox"/> (02) 7501 8527	Type:	Internal Sale	
Status: Paid	22 Forrester Street	Mobile:	<input type="checkbox"/>	Amount:	\$25.00	
Date Paid: 21/03/05	PRESTON NSW 2209	Work:	<input type="checkbox"/> (02) 2827 5509	Student:	1	
Amount: \$500.00		Fax:	<input type="checkbox"/>			
Course: CCF	Certificate 2 in Construction	Email:	<input type="checkbox"/> mail@matetrainers.com.au			
TOTAL FOR Mick Guain				Sale:	\$500.00	Commission: \$25.00
TOTAL FOR Newcastle and Hunter Valley:				Sale:	\$17,700.00	Commission: \$875.00
REPORT TOTAL				Sale:	\$21,760.00	Commission: \$1,233.00

A graph showing the sales is also available.



19.2 Sales Commissions

These may be assigned to permanent staff or third party agents. The cost of the commission factors into the financial analysis.

The sales commission is determined by the commission type selected when students are registered.

Sales commissions are calculated based on:

- Value of the sale price times the commission rate, **plus**
- A fixed amount per student, **plus**
- A fixed amount per booking.

Any of the above amounts may be zero.

20. Evaluations Surveys

Analysing Results

Evaluation Reports and Graphs are obtained from the Management tab of the *EMT* main window.

Question		Responses	(Worst)			(Best)		(None)	Overall
			1	2	3	4	5	0	
Amentities	How were the facilities in the amentities?	5	0	0	4	1	0	0	+0.20
Catering	How was the catering during the course?	5	0	4	0	1	0	0	-0.60
Overall	How would you rate the course overall?	5	4	0	0	0	1	0	-1.20

Because the EMT system uses global responses and shared questions, you can use these reports and graphs, you can compare performance across courses, locations, teachers, etc.

You could compare the results of the **Content** question for all offers of a specific course over time to see if a course remains relevant to the customers.

You could compare the average response to the **Facilities** question across all offers, grouped by location to identify your best and worst facilities.

Continuous Improvement

Probably the most important results of evaluation surveys are actions to correct problems and to target quality improvements to maximize the return in perceived value by customers and students.

By providing a convenient way to raise issues during entry of the evaluation results, EMT makes it easy to keep track of customer complaints (and praise). This provides a sound basis to improve your service as well as ensuring that each individual complaint is addressed.

21. Financial Analysis

21.1 Offer Profit & Loss Report

Financial reports enable the accurate Profit/Loss for courses and offers to be established.

- Click the **Management** tab in the *EMT* main window.
- Click the **Profit & Loss** button.
- The Profit and Loss report criteria window is displayed.

Enter the criteria for the report and the report format.

Enquiry Mate Trainers		Course Offering Profit Details			Demo Training Company		
				Offer No "C000001"			
Offer No	C000001	Status	Offered	REVENUE	COSTS		
Start Date	01/06/06	Students Booked	1	Student Fees	\$15,000.00	Commission	\$0.00
Finish Date	10/06/06	Students Paid	0	Funding	\$0.00	Teaching	\$87.50
Duration	60 Days			TOTAL	\$15,000.00	Coordination	\$800.00
Course	Tour Guide - Complete (TGFull)					Location	\$2,700.00
Teacher	Mick Quain (Demo Training)					Consumables	\$2,500.00
Location	Demo Training Co					Equipment	\$1,100.00
				PROFIT/LOSS		Other	\$375.00
				\$8387.50		TOTAL	\$6,612.50

21.2 Profit & Loss Calculation

The following chart shows source of information used in calculating Profit / Loss reports. The costs are retrieved from the **Offer Details** window and the **Registration** window.

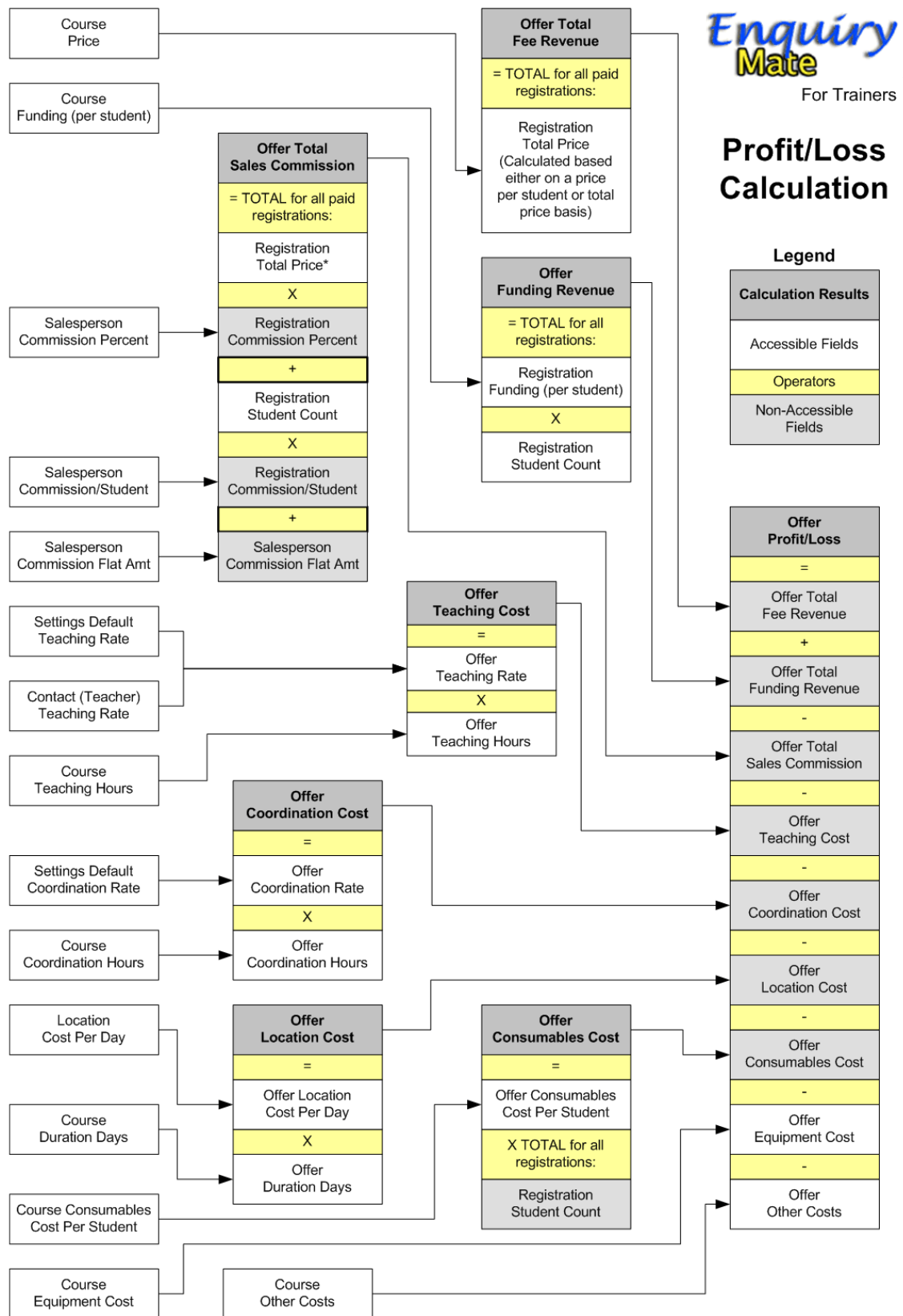
Offer Details		Tour Guide - Complete (TGFull)		Published	
		Thu 01/06/2006 to Sat 10/06/2006			
General	Registrations	Actions	Check List	Sessions	Results
					Costs
<u>Offer Costs and Rates</u>					
Teaching Rate	<input type="text" value="\$17.50"/>	Per Hour			
Coordination Rate	<input type="text" value="\$30.00"/>	Per Hour			
Consumables Cost	<input type="text" value="\$2,500.00"/>	Per Student			
Equipment Cost	<input type="text" value="\$1,100.00"/>	Total			
Other Costs	<input type="text" value="\$375.00"/>	Total			
Location Cost	<input type="text" value="\$45.00"/>	Per Teaching Day			
<p>Note: These values are automatically populated from the Course, System Settings, Location and Contact (Teacher) settings, but they may be changed here to reflect actual costs and rates for this offer.</p>					

The **Registration** window shows the **Total Price** and **Price/Student**. Below is a portion of the Registration window.

Offer No	All	<input type="text" value="C000015"/>	
Rego Status		<input type="text" value="Paid"/>	
Students		<input type="text" value="3"/>	<input type="button" value="◀"/> <input type="button" value="▶"/>
Concession*		<input type="text"/>	
Price/Student		<input type="text"/>	
Total Price*		<input type="text" value="\$800.00"/>	
Amt Paid		<input type="text" value="\$800.00"/>	
Payment Type		<input type="text"/>	
Payment Date		<input type="text" value="8/07/2005"/>	<input type="button" value="📅"/>

If the course is customised for a client, then the **Total Price** is the total price for the course regardless of the number of students. The **Total Price** is obtained from the **Offer** table. Otherwise, the **Price/Student** is obtained from the **Offer** table.

The following diagram shows the source of the information for the Profit and Loss report:

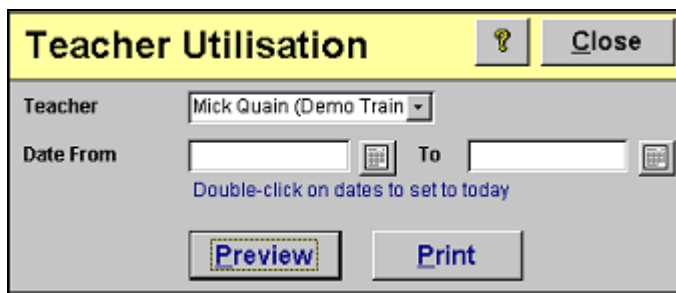


22. Teaching Resources

22.1 Teacher Utilisation Report

A report is available that list the utilisation of teachers and assessors for a location or all locations within a region.

- Select the **Reports** tab from the *EMT* main window.
- Click the **Teacher Utilisation** button.
- The *Teacher Utilisation* window is displayed.



- Select the criteria and report format for the report.

Enquiry Mate Trainers		Teacher Utilisation Report			Demo Training Company
Mick Quain Demo Training					
Dat	Date	Role	Location	Description	
Thu	01/06/2006	Teacher	Demo Training Co	Tour Guide - Complete (TGFULL)	
Fri	02/06/2006	Teacher	Demo Training Co	Tour Guide - Complete (TGFULL)	
Mon	05/06/2006	Teacher	Demo Training Co	Tour Guide - Complete (TGFULL)	
Tue	06/06/2006	Teacher	Demo Training Co	Tour Guide - Complete (TGFULL)	
Fri	16/06/2006	Assessor	Demo Training Co	Timothy Allen - Tour Guide Specialised Content (TGSpecial) 02:40pm	

The data for this report is gathered from the teacher for each session.

23. Training Locations

23.1 Location Utilisation Report

A Location Utilisation report lists a location or each location within a region. The times and the trainer for each offer booked are shown.

- Select the **Reports** tab from the *EMT* main window.
- Click the **Location Utilisation** button.
- The **Location Utilisation** window is displayed.

Location Utilisation ? Close

Region

Location

Dates From To

(This date range is compared to the Offer Start date or the Session Date, depending on which Report Format is selected)

Report Format
Offer Start/Finish, By Start Date
Daily Schedule, By Session Dates

Preview Print

- Enter the selection criteria.

Enquiry Mate Trainers **Location Utilisation Report** Demo Training Company
Date From 29/06/06

Demo Training Co **Newcastle**
Manager: Mick Quain (Demo Training) Phone: (02)4959 9988

Tue	01/08/2006	Tour Guide - Complete (TGFULL)
Mon	01/05/2006	Mon
Fri	01/09/2006	Tour Guide - Complete (TGFULL)
Mon	01/05/2006	Mon

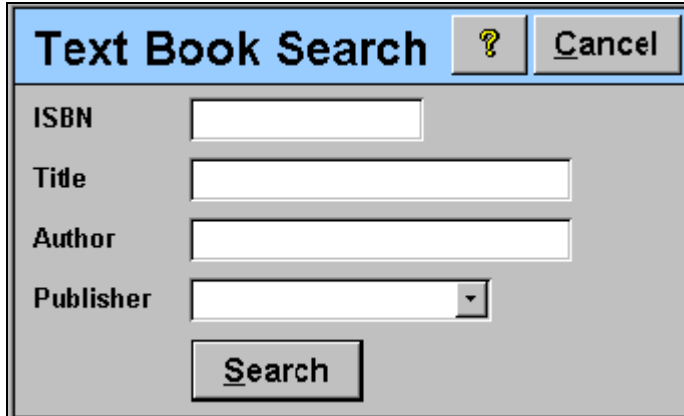
There is a report format that shows the start and end dates of offers. The other format lists every offer being run at the location for every day in the reporting range. This report relies on sessions being created for each offer.

24. Course Materials

EMT can record your stocks of course notes, work books, textbooks, etc including publishing details and prices from the **Reference** menu.

To search for a specific item or items:

- Click the Materials **Search** button on the **Planning** menu
- The Textbook detail window is displayed.



The screenshot shows a dialog box titled "Text Book Search". It contains four input fields: "ISBN", "Title", "Author", and "Publisher". The "Publisher" field is a dropdown menu. At the bottom of the dialog is a "Search" button. There is also a help icon and a "Cancel" button in the top right corner of the dialog.

- Enter the required details.
- Click the **Search** button.

EMT does not (yet) manage depletion of stocks as a result of running offers. This is simply a convenient way to record your stocks and re-order information.

Session 6

(Accounting)

Accounting System
Interfaces

25. Accounting System Interfaces

25.1 Introduction

EMT has two mechanisms for transferring sales data to either MYOB or QuickBooks. While the file format and account formats are different, the logic, controls and processes involved in each export function are identical.

We may extend the system to include other accounting systems or a generic export in the future. If you have some specific needs in this area, we would love to hear about them.

You can specify which (if any) of these interfaces you intent to use in the **System Settings** form (**Financial** page) and the appropriate items will appear on the **Management** menu.

Export Invoices

The first option is to **export invoices** as Sale / Invoice transactions. This option is best used when customers may or may not pay an up-front deposit or application fee and are then sent a single invoice for the balance.

The payment of that invoice is then to be tracked in the account system. This also allows you to properly record the value of those outstanding debts accrued on your balance sheet.

Only registrations with a non-blank **Invoice No** field will be exported

Export Payments

The second option is to **export payments**. This assumes that you keep track of accounts within EMT and export the payment data only for accounting purposes. This option can be used to record deposits entered in the registration, and either a full balance amount from the registration form or payments made against payment plan installments.

The export data is based on Payments in EMT and does not consider the Registration "Paid" status.

Because these processes use different sources of data, it is difficult to use **both** processes reliably. To do so, you would have to be very careful with the timing of the exports, invoice numbers and registration status values to ensure that partially paid invoices are not exported as deposit payments. We strongly recommend that you only use one of these methods at any time.

25.2 Data used in the export process

The default Sales and Bank account are defined in the System Settings.

The **Sales (Revenue)** account should be a MYOB or Quickbooks income account.

The **Bank (Asset)** account should be an asset account. This field is used as the asset account which is credited as a result of the payment for the Export Payments option only. The Export Invoices allocates the asset account according to the MYOB account of the service (identified by the Course No).

The screenshot shows a dialog box titled "Accounting Interface Options" with a pink header bar containing a help icon and a "Close" button. Below the header are tabs for "Certificates", "RTO", "E-Mail", "Financial", and "Database". The main content area includes:

- Accounting System:** A dropdown menu currently showing "MYOB".
- MYOB Account Numbers:** Two input fields: "Sales (Revenue)" with the value "4-1100" and "Bank (Asset)" with the value "1-1111".
- Customer Card:** A dropdown menu for "Account Card Format" currently showing "John Smith".

You can also specify the format of the Account Cards. Because this will be used to uniquely identify customers (when exporting invoices only), you should take care to be accurate with your names or company names on both systems. If the customer already exists in the accounting system under a slightly different name, a new customer record will be created. If this happens regularly, it may create some work later in cleaning up the accounting records.

Each course may be assigned an optional income account. This is an income account for revenue derived from the course.

If the income account is not specified, the default **Sales (Revenue) Account** from the **System Settings** is used.

The screenshot shows the "Course Detail" form for "Singleton Coal Big Red Tractor Licence (SCBigRed)". The form has tabs for "General", "Sessions", "Content", "Financials", and "Evaluation". The "Financials" tab is active. Fields include:

- Teaching Days: []
- Teaching Hrs*: [2]
- Default Price: [\$150.00]
- Purchasing Contract*: []
- Coordinator Hrs: [1]
- Inc GST?:
- Purchasing Schedule*: []
- Unsupervised Hrs*: [0]
- MYOB Accounts:** Sales (Revenue) is set to "4-1110" and is highlighted with a red box.

Each Payment Type may be assigned an optional asset account. This is an current asset account for the bank account into which payments of this type are deposited.

You can use this field to separate payments to various accounts, even if they are the same actual type. For instance, you might replace the "Cheque" type with "Cheque - General" or "Cheque - Suspense" and assign different accounts to each.

If the asset account is not specified, the default **Sales (Revenue) Account** from the **System Settings** is used.

Payment Types		
Payment Method	MYOB Bank Acct No	
Cheque - General	1-1110	
Cheque - Suspense	1-1120	
Credit Card	1-1110	
Direct Debit	1-1110	
EFT - General	1-1110	
EFT - Suspense	1-1120	
EFTPOS	1-1130	
▶ Invoice		
Money Order	1-1110	
Postal Note	1-1110	
*		

Most data related to exporting to accounting systems is entered into EMT during the registration process on the **Registration Details** form (on the Billing page) or on the **Payment Details** form.

The important fields for both processes are:

- **Inc GST?** - Whether the Total price includes GST or is GST-free.
- **GST Amt** – The actual amount of GST included in the total.
- **Customer** - The name or company of the customer.
- **Bill To** - This contact replaces the customer if present.
- **Sales Person** - Sales person name.
- **Exported to MYOB?** - Used by the system to control the process.

For *invoice* export, the following fields are important:

- **Total Price** - The total value of the sale.
- **Rego Paid Amt** - Amount paid (recorded on the invoice).
- **Rego Paid Date** - This should align with bank statements.
- **Invoice No** - Uniquely identifies sale transaction (for invoices).

For *payment* export, the following fields are important:

- **Payment No** - Uniquely identifies payment transactions.
- **Payment Amount** -The transaction amount.
- **Payment Date** - The transaction date.
- **Payment Type** - Identified the type of payment and bank account.

Other data held elsewhere is also used:

- **Course No** - Used to identify the professional service in MYOB.
- **Course Name** - Included in the invoice line or payment remarks.
- **Offer Start Date** - Included in the invoice line or payment remarks.

25.3 Exporting Invoices to MYOB

25.3.1 When is a Registration Exported as an Invoice?

An invoice is exported for each registration if all of the following conditions are met:

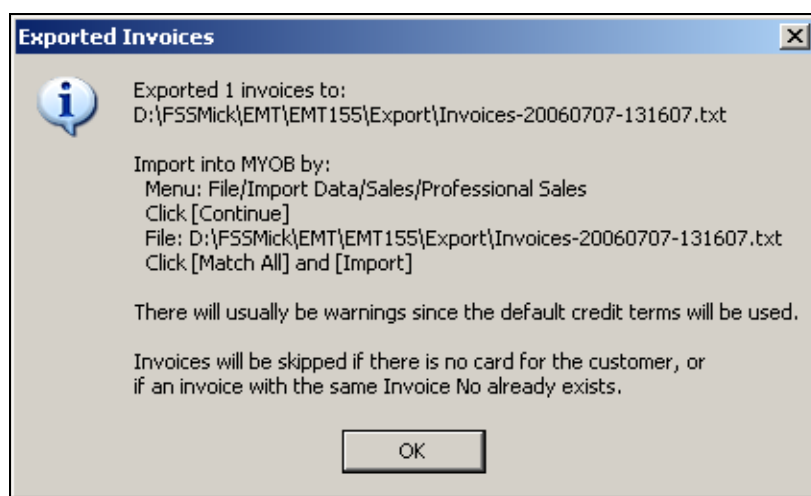
- A sales account is defined in System Settings, or (optionally) assigned to the course associated with the payment.
- An invoice number and invoice due date are present in the registration **Registration Details** form.
- The registration status is one of the **Paid** statuses. You would normally use a **Rego Status** of "Invoice" which is marked as a **Paid Status** in the **Rego Statuses** form (on the Maintenance Menu). This enables you to distinguish between tentative bookings (e.g. "Booked" status) even if you have received a deposit or application fee, and registrations that are to be invoiced.
- The registration has a **Total Price** that is not blank and is greater than zero.
- **Exported** check box for the registration is not checked.

25.3.2 Exporting the Data

To export data to MYOB you need to go to the **Management** menu and click the button labeled **Export Invoice**.

This creates a text file in the folder defined by the **Export Folder** field set in **System Settings** (File Locations page). The file name contains the current time and date down to the second so that it can be uniquely identified and archived if required.

EMT then shows the following dialog with brief instructions on how to import the file into MYOB.



All registrations exported as invoices in this way then have their **Exported** check box checked.

The amount exported is also set. This is used for later exports in case the total price is edited after the export. In this case, the additional amount is exported as a separate sale / invoice.

25.3.3 Importing the Data

After exporting the file as above, open MYOB or Quickbooks for the appropriate company file.

Follow the instructions given by the export process. It will specify menu options to select and which files to select. There will actually be two steps:

1. Import the customer records
2. Import the invoices

After the import, errors may be found. You can check the error log. In MYOB it is called MYOBLOG.TXT and is kept in the same folder as the MYOB (.MYO) data file for the company. If you do the import regularly, it may be useful to create a short cut to this file on your desktop so you can find it quickly each time.

You can re-run the import as before. Any invoices which were successfully imported will now be rejected due to duplicate invoice no, so you can be confident that it will not import them a second time.

25.4 Exporting Payments

25.4.1 When is a Payment Exported?

A **Payment** is exported if all of the following conditions are met:

- The **Exported to MYOB** check box for the payment is not checked.
- A MYOB **Bank Account** is defined in **System Settings**, or (optionally) assigned to the **Payment Type** associated with the payment.
- The payment allocation is **balanced**.

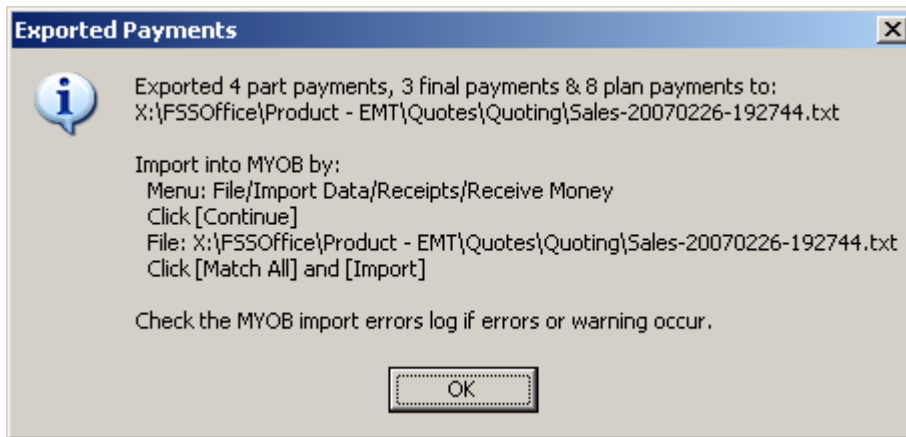
Note: While the system will appear to process payments with allocations that do not have a valid **Sales Account** (either is defined in **System Settings** or assigned to the **Course** associated with the allocation of the payment), the data is not usable and will not be included in the export file. For this reason, it is important to have a default Sales Account specified if you are exporting payments.

25.4.2 Exporting the Data

To export data to MYOB you need to go to the **Management** page of the Main Menu and click the button labeled **Export Payments**.

This creates a text file in the folder defined by the **Export Folder** field set in **System Settings** (File Locations page). The file name contains the current time and date down to the second so that it can be uniquely identified and archived if required.

EMT then shows the following dialog with brief instructions on how to import the file into the accounting system.



All payments exported as invoices in this way have their **Exported** check box checked. The amount exported is also set. This is used for later exports in case the payment amount is edited after the export. In this case, the additional amount is exported as a separate payment transaction.

25.4.4 Importing the Data

After exporting the file as above, open MYOB or Quickbooks for the appropriate company file.

Follow the instructions given by the export process. It will specify menu options to select and which files to select. There is only a single step with this process.

After the import, errors may be found. You can check the error log. In MYOB it is called MYOBLOG.TXT and is kept in the same folder as the MYOB (.MYO) data file for the company. If you do the import regularly, it may be useful to create a short cut to this file on your desktop so you can find it quickly each time.

25.5 What if I need to correct a mistake?

Each invoice is identified in the accounting system by the **Invoice No.** Each payment is identified by the **Payment No.**

This ensures that even if you manually uncheck the **Exported** check boxes and attempt to re-import the same transaction, the accounting system will reject it unless the previous transaction with the same number has been deleted.

Thus, it is possible to correct the data in *EMT*, uncheck the **Exported** check box, delete the corresponding transactions in the accounting system, and allow it to be processed again.

25.6 Entering Invoices to MYOB Manually

Alternatively, you can transfer invoices to MYOB manually using a report designed specifically for that purpose. In *EMT*, go to the **Management** page and choose the **Sales** reports.

On the Sales reports search page, choose the **MYOB Sales Entry** report and enter any criteria, such as a date range, similar to that shown in the diagram below.

Sales Reports ? Close

Course

Salesperson

Sales Territory

Rego Date **to**

Rego Status **Paid Statuses Only**

Report Format

- Sales Detail
- Sales List
- Territory Summary
- Salesperson Summary
- MYOB Sales Entry**

Preview Print

This produces a report showing the fields needed to be entered into MYOB to create the client and salesperson cards (if they do not already exist) and the invoice details. These can then be entered into MYOB through the normal processes.

Session 7

(AVETMISS)

AVETMISS Reporting

26. AVETMISS Reporting

26.1 AVETMISS Export

The student information is exported to AVETMISS that meet the specified date range. The significant dates are:

- Offer start and finish dates
- Module start and finish dates
- Result dates
- Issue date of qualification attempts

How often should I submit an AVETMISS report?

The enrolment and completion information is exported in the AVETMISS format if it applies in the specified reporting period (a date range). It is up to the user to ensure that each reporting period starts the day after the previous reporting period ended.

The actual period reported depends on a range of factors including state, funding source, type of qualifications issued, etc. It may be annually, quarterly, monthly or any dates at your option. Your state authority should inform you of your expected reporting frequency.

The critical date fields for AVETMISS reporting are:

- Offer Start Dates are used as the commencement date of training.
- Certificate Issue Dates are used as the date that qualifications are completed.
- Result Dates are used as the date that modules and nationally recognised short courses are completed.
- RPL Accepted dates are used as the date on which a module was completed by RPL.

Ensure that all the results and offer details that may be reported are up to date before exporting data to AVETMISS. Once data is submitted and validated, it can be difficult to correct and may lead to validation issues in the following period if later changed.

Which students get reported?

If the **Export All Student** flag in **System Settings** is checked then all students that meet the date criteria are exported.

Otherwise, only students with the **Export to AVETMISS** flag set (on the **Funding** page of the **Registration Details** form) are exported.

You can selectively restrict the export to a particular **State Code** (based on the student's **Contact Details (Statistical)** page).

You can also export selectively by **Funding Source**.

Does EMT support graded results?

EMT provides support for graded results by allowing you to define your own list of result codes. Each of your internal result codes is mapped to a valid AVETMISS **Outcome Code**. Thus, only valid Outcome codes are exported, but you can control which code applies to your results.

Does EMT comply with requirements in my state?

There are variations to the national standard in some states which we allow for. The export form shows a list of state-based authorities whose standards we comply with.

In some cases, specific fields have been added and are only exported to the AVETMISS files in those states. These are marked with a double asterisk (**) to denote that they are state-specific AVETMISS fields.

What level of the standard is EMT compliant with?

EMT complies with the AVETMISS release 6, as required by most state authorities. Variations to the standard for state funding claims and national statistics vary regularly in some states. We are committed to staying up to date with the AVETMISS standard on a continuous basis.

Please call our support staff to discuss any specific concerns you have with regard to compliance issues.

26.2 File Management

The following files are saved in the Export folder location defined in the System Settings. Each set of export files are saved in a sub-folder within this folder which identifies the authority and the reporting period end date. This enables you to retain the files that are submitted in an appropriately named folder, so that you have a permanent record of your submission:

NAT00010	Training Organisation
NAT00020	Training Organisation Delivery Location
NAT00030	Course
NAT00060	Module/Unit of Competency
NAT00080	Client
NAT00085	Client Postal Details
NAT00090	Client Disability
NAT00100	Client Prior Educational Achievement
NAT00120	Enrolment
NAT00130	Qualification Completed


The NAT00005 (Submission to Managing Agent) file is not created by RTOs.


An empty NAT00180 (Unit of Competency Completed) file is still produced even though it is no longer used in any states.

The system also creates a file called **Report.htm** which is an HTML file containing a more readable version of the data in the NAT files. This may assist with later analysis of past submissions.


26.3 Data Validation

During the AVETMISS export, the data is validated by EMT to catch logical errors that the system can detect. An error report showing the results of the last export is shown. The report is arranged by file and error type.

 AVETMISS Error Report Demo Training Company	
Start	
Export Started	16 Nov 2006 03:43pm
Reporting Period	01 Tue 2006 to 31 Dec 2006
AVETMISS Release No	5.0
Reporting Standard	National
Export Finished	16 Nov 2006 03:43pm
NAT00010.txt records written	1 of 1
NAT00020.txt records written	0 of 0
NAT00030.txt records written	1 of 1
NAT00060.txt records written	0 of 0
NAT00080.txt records written	1 of 1
NAT00085.txt records written	0 of 1
NAT00090.txt records written	0 of 0
NAT00100.txt records written	0 of 0
NAT00120.txt records written	0 of 183
NAT00130.txt records written	1 of 1
NAT00180.txt records written	0

 AVETMISS Error Report Demo Training Company	
NAT00120 Enrolment	
Record 1	Vasko Campbell
Error Messages	
Offer Not Finalised	C000002: Confirmed
Missing Delivery Method	Offer C000002
Missing Scheduled Hours	Offer C000002
Missing Fund Code (National)	Rego R000012
Missing Reason for Study	Rego R000012

The report also contains all valid data written to the files.

		<h2>AVETMISS Error Report</h2>	Demo Training Company
NAT00010 Training Organisation			
Record 1			
Training Organisation Identifier	9999		
Training Organisation Name	Demo Training Company		
Training Organisation Short Name	Demo Training		
Training Organisation Type Identifier	19		
Address First Line	Unit 7, 163 Brighton Ave		
Address Second Line			
Address Location - Suburb, Locality or Town	Toronto		
Postcode	2283		
State Identifier	01		
Contact Name	Martyn Webster		
Telephone Number	0249599988		
Facsimile Number	0249592976		
E-mail Address	martynw@firststrike.com.au		

Note that most state authorities require all NAT files be validated using the NCVER validation program before submission.

There are also validation errors that cannot be picked up in either EMT or the NCVER validation program that relate to the continuity of enrolments across reporting periods.

26.4 Fixing Validation Errors

To correct errors found during the export process, use the **Fix Errors** button on the AVETMISS Export form.

Export Errors					?	Refresh	Explain It	Fix It	It's Fixed	Close
NAT	Rec#	Problem	Data	Student Name						
080	1	Missing Date Of Birth (VIC)	Jessica Alba	Jessica Alba						
080	1	Prior Education Flag changed to N (VIC)	Jessica Alba	Jessica Alba						
080	2	Missing Suburb (VIC)	Mary Freddo	Mary Freddo						
080	2	Missing Date Of Birth (VIC)	Mary Freddo	Mary Freddo						
080	2	Prior Education Flag changed to N (VIC)	Mary Freddo	Mary Freddo						
080	3	Missing Date Of Birth (VIC)	George Duc Gray	George Duc Gray						
080	4	Missing Suburb (VIC)	Gred Nerker	Gred Nerker						
080	4	Missing Date Of Birth (VIC)	Gred Nerker	Gred Nerker						
080	4	Prior Education Flag changed to N (VIC)	Gred Nerker	Gred Nerker						
080	5	Prior Education Flag changed to N (VIC)	George Chi	George Chi						
080	6	Victorian Student Number Too Long	9876543210	Joe Kerr						
080	7	Missing Date Of Birth (VIC)	Thomas Friede	Thomas Friede						
080	8	Missing Suburb (VIC)	Martyn Kwok	Martyn Kwok						
080	8	Prior Education Flag changed to N (VIC)	Martyn Kwok	Martyn Kwok						
080	9	Prior Education Flag changed to N (VIC)	Joe Macleod	Joe Macleod						
080	11	Prior Education Flag changed to N (VIC)	10004 Walsh	10004 Walsh						
080	12	Missing Date Of Birth (VIC)	James Skarrait	James Skarrait						
080	12	Prior Education Flag changed to N (VIC)	James Skarrait	James Skarrait						
080	13	Missing Date Of Birth (VIC)	Fred Nerker	Fred Nerker						

Record: 1 of 764

Move the cursor to a line in the report. You can:

- Click the **Explain It** button to display a help topic about that error message.

- Click the **Fix It** button to open the relevant form and highlight the field which is incorrect or missing. This will not always find the exact source of the error, but it will be correct most of the time.
- Click the **It's Fixed** button to remove this error and any other errors which were related to the same field for the same data item. For instance, if the scheduled hours is missing for a competency, then all students with a result in that competency will be fixed by entering the correct value, and will thus be removed from the list.

Once all of the errors are fixed, you can close this list and run the export process again. It is possible that further errors are found, as the first round of errors may have prevented validation of other errors. Repeat this process until you get an error-free export.

Warnings will not prevent data being exported, but might highlight conditions which are known to cause issues in some contexts. From the data we have, we cannot tell whether the context makes them required values, so you should check these to verify that they are not significant.

27 Other Reporting Systems

27.1 RAPT (WA)

EMT can export RAPT files. This is a WA-specific format for reporting apprentice/trainee data to WA-DET. Providers who deliver relevant courses in WA but are not based there are required to report data for those students.

Click on the **RAPT (WA)** button on the **AVETMISS Export** form to switch to exporting in that format. The logic is similar to AVETMISS but there is less reference data and thus fewer errors are expected.

27.2 CQR (WA)

EMT can export CQR (Client Qualifications Register) files for WA-TAC as well. This is a new file format containing parchment data (Qualification Certificates and Statements of Attainment).

Click on the **CQR (WA)** button on the **AVETMISS Export** form to switch to exporting in that format.

There is a similar but different format used in SA which we have not yet implemented due to lack of demand. If this is a requirement for your organisation, please contact us to discuss your needs. We expect that similar systems will be needed in each state by 2011 due to the changes specified in AQTF 2010, so this is a “work in progress” at this time.

27.3 Quality Indicators

Click on the **QI Export** button on the **Management** menu to switch to open the export form.

EMT can produce data for **QI #3 (Completion Rates)** suitable for uploading to the CCOS system operated by ACER. After you upload the data to the CCOS system, you can edit it manually on that site to correct or remove any data which has been incorrectly picked up.

If you operate within a single state, we recommend that you use this as the default state. This will mean that any student for without a State Code on the **Statistical** page of their **Contact Details** form will be assumed to be in this state for QI reporting purposes.

EMT can produce **QI #1 (Learner Feedback)** and **QI #2 (Employer Feedback)** data files base on the responses to the two specifically named Quality Indicator surveys.

This data is the entire response set for the year, and is designed for importing into the ACER (spuriously named) “SMART” system. That system can then produce an annual summary file in whatever format may be needed by the regulators. We hope to replace this arrangement with a directly reportable annual summary as soon as the exact content of that report is clarified.

The system indicates the location of the files when the **Export** button is clicked and you can adjust this if necessary.