

Summary

A minor update containing a range of requested enhancements.

Major Enhancements

REPORTS

- Added Offer Notes to 15 day assessment sheet class list layout.
- New layouts in Sales reports: "Revenue by Company" and "Students by Company".
- New layout in Enquiry reports: "Enquiry Closure Rates".
- New layout in Assessment reports: "Assessments by Offer" (also via a quick button on the Offer details form).
- New layout in Result reports: "Student Progress Report".
- New layout in Enrolment (Registration) reports: "Students by Course".
- New layout in Payment Received reports: "Payment Allocations by Course".

SESSION SCHEDULING & RESULTS

- Added Schedule New Sessions function to enable forward planning of sessions.
- Added new page to Session Details form to enable entry of Module Results for all students in a session.
- Added buttons to switch between Session Attendance and Session Details (and Results) forms.

FORM LETTERS

- New memo field "Company Notes" added to Company details form.
- Added target company details and target web site to form letter fields.

WEB INTERFACE

- Popup appears on Main Menu (manager level operators) indicating that web interface records have arrived.
- Added downloading of enquiries function.
- Added uploading of results function.

Minor Enhancements

STATEMENT NO

- When setting a Result on the detail form, allocate a Statement No (without asking) for Statement-based courses.

SEARCHES

- Added Offer status criteria to Rego Search form.

EVALUATION SURVEYS

- Added a Section No to the Questions form (Reference Menu). Adjusted survey sheets to group by Section No.
- Added a button to create an adhoc survey on the Evaluation Entry form.

SYSTEM SETTINGS

- Added new option to customise the "Signed By" label on class lists.
- Adjusted selections in "Copy eMail" option (added option to just copy & confirm without guessing).

LICENCE KEY

- After setting the licence key correctly, the "License Key is Required" warning on the Menu is removed immediately.
- Added Evaluation licence option to the Licence Level list.

AWARD SEARCH

- Added Award Status and Stage to criteria. Adjusted widths on Award List form and added Award Status.

INACTIVE OFFERS

- Changed logic to allow for Training Start Date to be counted as activity, to avoid making delayed starts inactive.
- Log the results of the daily process for system analysis purposes.

REFERENCE DATA UPDATE

- Updated reference database based on NCVET data files update in June 2010 (including TAE10 package).
- On the Site Details form, the ASGC Local Area Code list is restricted by state if the State Code is not blank.

PAYMENT REFERENCE

- Added Payment Reference field to the Registration Details form and the Web Interface (Rego Download).

SETTINGS WIZARD

- Changed label of Close button to Cancel and added confirmation when this button is clicked.
- Validate and automatically capitalise staff names, position and email address.

ATTACHMENT FILES

- Enable deletion of Attachment files by removing all Action and Form Letter references.
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Bugs Fixed

HELP SYSTEM

- Fixed linkage to Help System on the Result Reports form.

CERTIFICATION REGISTER

- Adjusted report to ensure that student name appears ("Name on Certificate" field or "FirstName LastName")

Notes

PERFORMANCE

- Improved performance of Mail Out Manager form when reading and analysing recipient list.

UPDATE 3.11a

- Absence events set link to related Offer on the action details, as intended.

UPDATE 3.11b

- Reverse labelling of Mail-Out Manager "Remove With & Without Mailing Address" buttons.
- Fixed bug with Mail-Out Manager [Generate Actions] function when trying to create sample-based survey mail-out.
- Fixed resizing behaviour of Course and Result lists in Web Interface form (affects Access 2007 only).

UPDATE 3.11c

- Fix bugs in CQR export to insert blank field when TRS No not used, and only show units with competent results.

UPDATE 3.11d

- Added tracing messages to AddNewAction routine.
- When a specific record lock situation occurs, added the popup option to "try again".
- Handle case in AVETMISS export where there are zero students in a registration with results without crashing.
- Handle case of blank names in Offer Details (Registrations page) and Contact Details (General page).
- Enabled Funding Code criteria on AVETMISS export for Offer-based exports.
- Fixed page numbering issue on HVTC customised reports.
- Added Funding Source to the Registration search criteria.
- Tidied up alignment of Report Total section on Payments Due summary report.

UPDATE 3.11e

- Fixed bug in Contact Import routine (affecting ODBC back-ends only).
- Added option in Contact Import routine to merge FirstName and MiddleName data into "First Names" field.
- Change "Zero Scheduled Hours" AVETMISS Error to a Warning for QLD-DET format.
- Adjusted display format of NAT File No in AVETMISS error list (esp for 030 and 060 files).

UPDATE 3.11f

- Added SofACompetencyDates field to Statement of Attainment document layouts.
 - Fixed error message when changing the Course for an offer with a blank Start Date or Finish Date.
 - Adjusted popup text on schedule charts to remove "Customised for" line. This data will appear in the first line.
 - Correct Enquiry Deactivation routine to enable it to deactivate old enquiries with actions.
 - Fixed display of Active check box on Enquiry Contact sheet report.
 - When adding actions on the Offer detail form, the action(s) are linked to the teacher(s) as target contacts.
 - Trigger "WebRego" and "WebEnquiry" actions when web interface records are processed.
 - Added Internal Ref No to Offer Search criteria.
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Summary

A major upgrade, including a revamp of the Mail-Out Manager and certification renewal action processing logic.

Major Enhancements

EXPIRING CERTIFICATION REMINDERS

- Features to support certification refresher periods within the renewal period (for use with Apply First Aid / CPR refresher). Adjusted reminder processing accordingly, replacing reminder sent check boxes with a progress status field. Making a booking in a course which refreshes or renews a certification can prompts the operator to complete or delete actions related to any existing awards in related certifications (e.g. unsent renewal notices or phone calls).

MAIL-OUT MANAGER FORM

- Rebuilding and extension of the Mail-Out Manager to a wizard format with new search options.

OFFER DETAILS FORM (REGISTRATIONS PAGE)

- Changed Offer Details registration/student lists to a single tree view control.

CLASS LISTS FORM

- Added 4 new session class list formats, including competencies.
- Changed class list report format selection to a tree view control.
- Added new class list format: a 6-column assessment sheet with mixed widths.

RESULTS MANAGEMENT

- Added Due Date field to assessment tasks in result details form, which can be set automatically based on the Module details. AVETMISS reporting now allows results with No Result code to have their enrolment end date extended automatically to the due date of the last planned assessment task (if due dates have been entered). This effectively enables the AVETMISS reporting to automatically handle post-course assessment processes as if the module was continuing until the assessment due date.
- Rearranged Marking reports to sort by Marker, Task & Student, and added Offer No and Due Date criteria, and marker summary format.

Minor Enhancements

CERTIFICATE PRINTING

- When editing document layouts, Borders are automatically turned off when closing the form (with the [Close] button only).
- On Attempt Detail form, [Success] or [Fail] buttons don't overwrite an existing "Name on Certificate".
- Improved "mark as printed" logic after printing documents so that the system warns the operator of any documents already printed.
- Added to the Expected Result options (on the Course Details form), options to issue both a qualification and one or more statements.

QUALIFICATION ATTEMPTS

- Added Completion Date to qualification attempts (separate to certificate issue/fail date) on detail and qualification document layouts.
- Allowed for date formatting of the Result Dates list on Transcript competency list.
- When new attempts are created automatically, the Funding Code for the registration is copied to the new attempts.
- Added pop-up indicator to attempt detail form when details are locked. Clicking on the label also activates the Unlock button.

SESSIONS & ATTENDANCE TRACKING

- Added new Session Chart format, grouped by Teacher (Planning menu / Sessions box).
- Added display of absence reporting to Student Registration details, including [Reset] button (manager level operators only).
- Added Absent25 event to pick up 25% absence level in attendance tracking by hours.
- In Session Details form, when the Time Slot is changed, the Start and Finish times change to the default times for that time slot.
- Rearranged the title fields on the Session Attendance entry form, adding module code and name and combining times into one field.
- On Session Details form, added option to print mailing labels for all students.

AVETMISS REPORTING

- Added the option to mark funding codes as exportable and to choose "All Exportable Funding Codes" in the export process. This is intended to enable Victorian clients to report all data for selected funding codes in a single upload file, as required.
 - Changes to result codes, tasks received, tasks marked and assessments done cause the system to ask whether to reactivate inactive offers. Offers are made Inactive automatically due to inactivity so this activity indicates that they are In Progress again.
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- Added warning when selecting a funding-scheme specific export for Skills Victoria.
- Added validation to NAS Contract in Student Registration Details form (####9999/9) format.
- Added the "lost" CRICOS Provider No field into the RTO Details form (for documentation purposes only).
- Added option to specify a particular qualification for modules, for AVEMTISS reporting purposes (over-riding the course qualification).

EVALUATION SURVEYS

- Added confirmation in evaluation entry form if closing or starting a new response without saving the current response.
- On Evaluation Survey Reports form, the Survey Id criteria now accepts numbers only. It converts to the standard format if required.
- In evaluation survey response entry, the response date defaults to the survey date when entering from the Survey Details form.

VALIDATION FUNCTIONS

- Added company merge function.
- On Manual Merge form, show name and company in drop-down contact lists.

TOOLBAR OPTIONS

- Added "Export to PDF/XML" and "eMail as Attachment" to Print Preview Toolbar (Access 2007 only).

CONTACT DETAILS

- Added option as to whether to guess or copy the email address of a customer to each student in rego and when duplicating a contact.
- Allowed extended character set characters in text fields (e.g. letter with accents, wingdings, etc such as "Café 101").
- Added Contact Notes to phone lists and student programs reports and datasheets.
- Added new Contact Reports format "Student Programs by Course".

PAYMENT TRACKING

- Incorporated surcharge amounts into Payment Due reports.
- Added new format with contact details for use when chasing overdue payments. Also added datasheet option.
- Added Event [!] button to payment details form to allow for re-creation of receipt actions.

ACTIONS & FORM LETTERS

- Adjusted logic so that Due/Target dates to automatic actions with "Before Due Date" option are both moved back.
- Added the option to automatically retain a copy of the actual content of action emails and letters for selected Action Types.
- Added Logon Id and Password (for the student / target) as form letter fields.
- Adjusted form letter fields relating to registration amounts to use the GST Amt fields instead of the GST check box.
- Added student date of birth as a form letter field.
- Added Show Borders option on Form Letter detail form. Adjusted logic for use of this feature on Document Layouts and Form Letters.

OFFER SCHEDULING

- Added criteria to Offer Schedule reports to allow selection of non-available offers.
- When adding new sessions on the Offer Details form, the session Teacher defaults to the main for the offer.

REFERENCE DATA

- Minor adjustments to country code table for compliance purposes.

SALES ANALYSIS

- Adjusted sales reports to reflect the registration Total Price and Paid Amt (i.e. deposits, up-front payment etc). Enhanced format of some sales reports. Added funding and revenue calculations to Sales Summary by Territory format.

TRAINING PLANS

- Adjustments to the wording of the declarations in the Victorian training plan to comply with specific requirements.
- Show blank dates on training plans when not set in the Offer Content page (instead of offer start / finish dates).

REGISTRATION REPORTS

- Added Delivery location State Code criteria to Registration (Enrolment) Reports, in addition to Student State Code criteria.
- Added teacher criteria to registration search and reports.

RESULTS MANAGEMENT

- Added Location/Site/Region criteria and Data Sheet format option to Result Reports.
 - Added No Result criteria to Result Search and use Result / Module / Offer Finish dates (in order of preference) as "Finish Date".
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CONFIGURATION

- Course Wizard competency search automatically selected full codes when entered and searches for part matches on description.
- Add button on the System Settings form (Graphics page) to set default teacher colours based on their name.

Bugs Fixed

FUNCTIONAL ISSUES

- Fixed "Invalid use of Null" error on Attempt Detail form when issuing a certificate without first looking at the Competency page.
- Sales commissions calculated automatically on Registration details form.
- Disabled result criteria on Result Reports for Statement Register format (it doesn't make sense to report partial statements).
- Prevent Print Queue from printing letter which are not yet due (when not highlighting any letters in the list).
- Module Details [Update Results] button copies unmarked (assessment) tasks as well as marked tasks to Result Details.
- Stopped the system setting the Printed flag after printing a Qualification Certificate and replying "No" to the prompt.
- Corrected logic for setting inactive programs to use the correct lag time to avoid premature change to Inactive status.
- Adjusted logic in various places to use new "Availability Option" on Offer Status instead of redundant "Available?" field.
- Changed Layout Export function to ignore the redundant SystemLocked field for compatibility when importing.
- Fixed behaviour of Action Detail form and eMail Queue form when dealing with SMS and Fax gateway contact methods.

COSMETIC AND INCIDENTAL ISSUES

- Corrected the title of the Marking Reports (the formats with and without Re-Marks were reversed).
- Corrected wording of the popup message which appears each day that offers change status automatically.
- Show work phone instead of home in the Class List by Teacher report.
- Activated context menu (right-click menu) on Course Details subform lists and some other forms where it was missing.

Notes

BACK-END RELINKING

- As a work-around the windows networking problem whereby mapped network drives are not logged when an application tries to access them, the EMT system now offers to "try a bit harder" to open MDB files. It attempts to open windows explorer for the folder because windows explorer seems to force mapped drives to be logged. EMT then tries again to see if the file can be found.

EMT UPDATER

- Changed auto-updater process to include default WEB interface file and Learning folder files.

PERFORMANCE

- Improved performance of Result Details form (by removing VBA functions from bound query)

CUSTOMISATIONS

- Adjustments to HVTC customised result report format as requested.

FORM LETTERS

- Removed the option to display GST as part of payments and balances. The following form letter fields are no longer supported: [PaidAmtIncGST]; [PaidAmtExGST]; [PaidAmtGST]; [BalanceIncGST]; [BalanceExGST]; and [BalanceGST].

DOCUMENTATION

- Full revision of the user guide (to release 3.10) and inclusion of the guide in the main installation file.
- Improved readability of release notes with sections and bullet points.

UPDATES:

Release 3.10a:

- Added GST Amt to Offer Details form. Fixed bug when creating payment plans with blank GST Amt in Offer Details.

Release 3.10b:

- Fixed issue when adding responses to a newly created adhoc survey.
- Fixed problem displaying new [CompletionDate] field on Transcripts.

Release 3.10c:

- Actions created in the RegoMoved event linked to the enquiry of the moved registrations.
 - Allow "Copy to Salesperson" option for non-eMail Action Types (actions may be changed to an eMail method later).
 - Added [AwardOriginalDate] and [AwardRefreshDate] to form letter fields (for certification awards linked to action).
 - Added offer module code, name and date lists to form letters, correcting non-functional fields for codes & names.
 - Fixed crash when copying email in firstname@domain format from one contact to a new contact.
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Release 3.10d:

- Changed MYOB Payment Export to use tax code "FRE" when there is no GST instead of "N-T".
- When a charge is fully paid, the system asks whether to change the registration status to Paid (if not already).

Release 3.10e:

- Added log of enquiry notes changes when Optimisation is On. Force a record save when changing notes.
- Reactivation of Inactive offers function recognises customised "Inactive" offer status.
- Aligned report names on Reports form and report headers.
- Added new result report showing Competencies within Modules.

Release 3.10f:

- Fix issue with Mail-Out manager using Registration criteria matching Customer contact.
- Added Due Dates and Module Start & Finish dates to Data Sheet layout of Result reports.
- Added Offer Status criteria to marking reports.

Release 3.10g:

- On Module Details form, changing the (unmarked) assessment tasks enables the [Update Results] button.
- On Contact Details form, when adding an adhoc certification, the Award Status defaults to "Current (Original)".
- When a contact is made a student by allocating a Student No, the Statistical and Student pages appear immediately.
- Fixed bug when teacher colour on charts is pure Red which was disabling clicking to open the Offer Detail form.
- On Offer Details form (Content page), only start & finish dates are in the tab order to speed up data entry of dates.
- Student Registration Details form links are updated when the linked RPL or Attempt(s) are deleted.
- Added new session-based class list including registration status instead of times).
- Added new session-based class list with offer times (instead of session times) for use with mixed short courses.
- Improved fault-tolerance of automatic session allocation, allowing for blank Week No and Day of Week.
- Fixed bug in Course Detail form (Sessions page). When a Time Slot is set, the Day of Week is set automatically.
- If teacher colour is set to zero, it is displayed as white (not black). This is likely to be an unintentional default.
- Added Offer Status as criteria in all Result Reports.
- Added link to remote assistance host

Release 3.10h:

- On Class List report form for Evaluation Sheet, apply the date range correctly (avoid a "ResponseDate" popup box).

Release 3.10i:

- Fix issue with QI Learner survey demographic default values when responses include non-responses.
- Tweaked the name matching to give a larger match penalty when there are left-over unmatched letters in order to reduce overly optimistic matches against small search strings.
- Added Salesperson Company criteria to sales reports, and checked that all reports accept all criteria.

Release 3.10j:

- Stopped creation of sessions outside the range of offer dates during automatic session scheduling when scheduling new offers.

Release 3.10k:

- Fixed name matching problem with 3.10i searching with small strings.