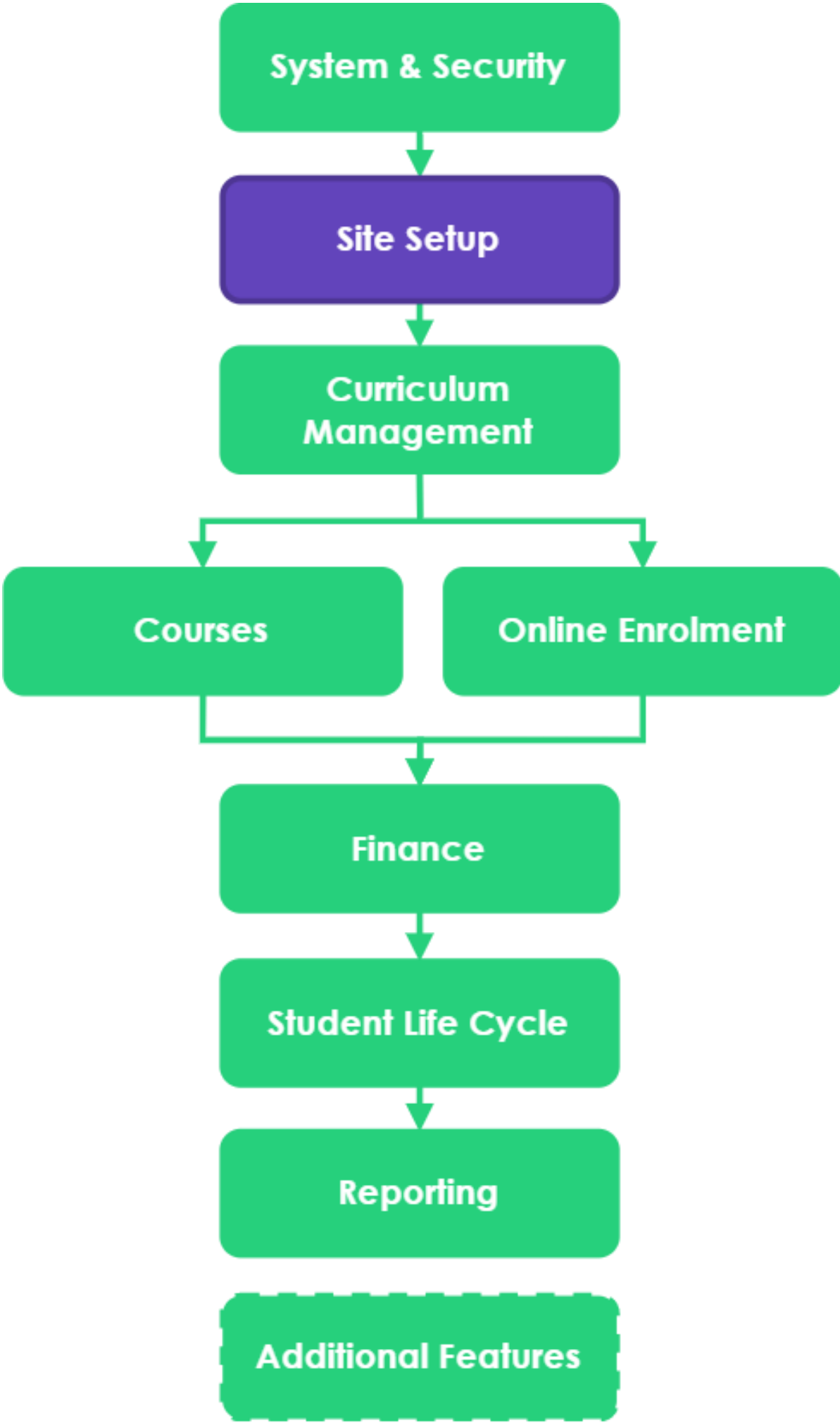


# Topic 2 - Site Setup



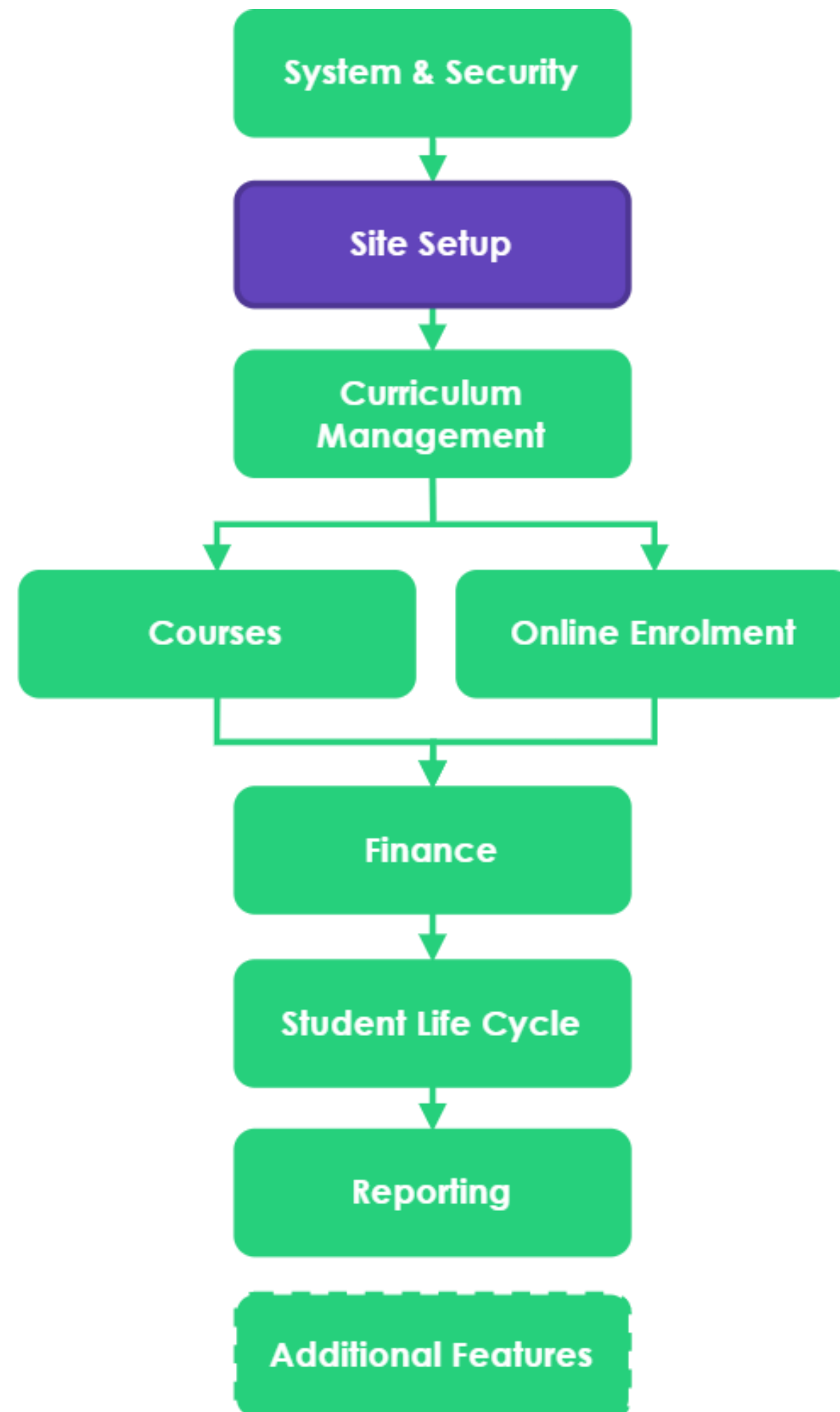
# Agenda



## Topics Covered

- |    |                              |
|----|------------------------------|
| 1  | RTO details                  |
| 2  | USI setup                    |
| 3  | Certificate management       |
| 4  | Email configuration          |
| 5  | SSO (Optional)               |
| 6  | Locations                    |
| 7  | Funding contracts (Optional) |
| 8  | Numbering schemes            |
| 9  | Outcome preferences          |
| 10 | Branding                     |

# Agenda



## Learning Objectives

- 1 To update the RTO's details
- 2 To be able to create new locations
- 3 To be able to update the branding details





# RTO Details



ReadyTech Education



# RTO Details

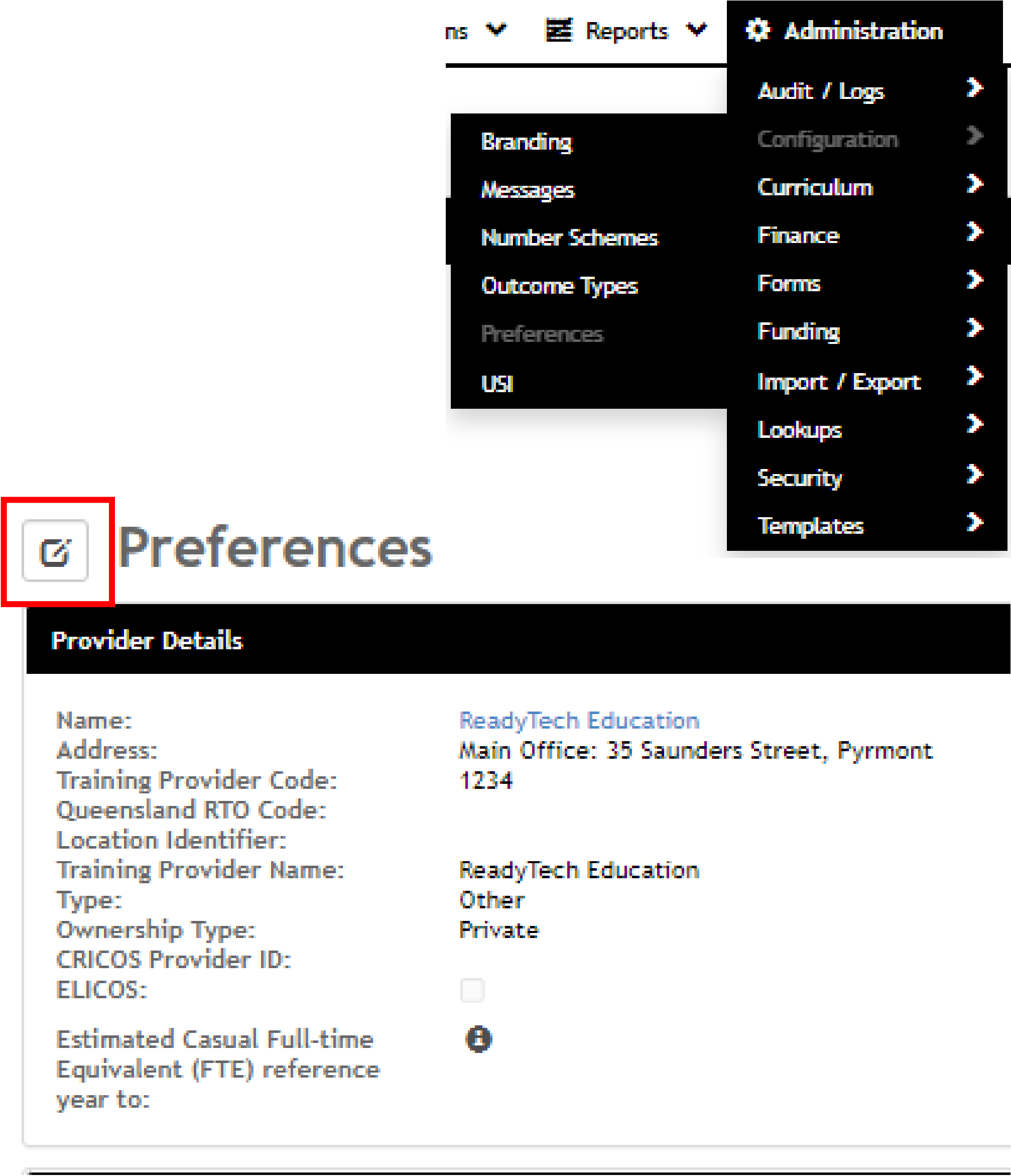
## Step 1

The Training Organisation NAT00010 file provides details of the organisation responsible for administering the information contained in the collection files

To ensure the correct information is within this file its important to update your provider details

Administration > Configuration > Preferences

Your details will need to be the same as what is listed on training.gov.au.



# RTO Details


## Step 2

You must also update your organization details in your own company profile

Click on the hyperlink within the preferences

This will open the profile

Update the details here to be the same



Preferences

Provider Details

Name:

ReadyTech Education

Address:

Unit Office 15 Saunders Street, Pyrmont

Training Provider Code:

1234

Queensland RTO Code:

Location Identifier:

Training Provider Name:

ReadyTech Education

Company

Profile

Details

Compliance

Contacts 1

Relationships

Employees 0

Courses

Service Centre

Finance

Balance: \$0.00

Calendar


Notes / Checklists 0 +

SMS




Email


Documents 0

Letters & Forms



ReadyTech Education rto00001





0

View all

Profile

Legal Name

ReadyTech Education

Trading Name

ReadyTech Education

Industry

Company Level

Account Owner

Company Type

Employer

ID

rto00001

Status

ANZSIC Code

# of Employees

40

Source

Description

Email

Phone

(Phone) (Work) 0290185525

Address

Main Office: 35 Saunders Street,  
Pyrmont,  
NSW 2009,  
Australia

Identification

No identifications have been recorded

Login Credentials

Employer Access

☐

Login

Last Login

Lock Account

☐

Admin

Contact Method

Letter

Do Not Market

☐





# Unique Student Identifier (USI)





# USI



The Unique Student Identifier (USI) is mandatory for all students studying nationally recognised (accredited) training, where no exemption exists. To access USI functionality within the SMS you will need to:

1. Register for USI Web Services
2. Set up a myGovID
3. Link your RTO/Business in the Relationship Authorisation Manager (RAM) website
- 4. Collect details for RAM notification from SMS**
5. Setup a RAM Notification
- 6. Test connection in SMS**

The ATO has a standard help page available to clarify the purpose of these systems:

<https://www.ato.gov.au/General/Online-services/Accessing-online-services-with-myGovID-and-RAM/>



# USI

## (1) Register for USI Web Services

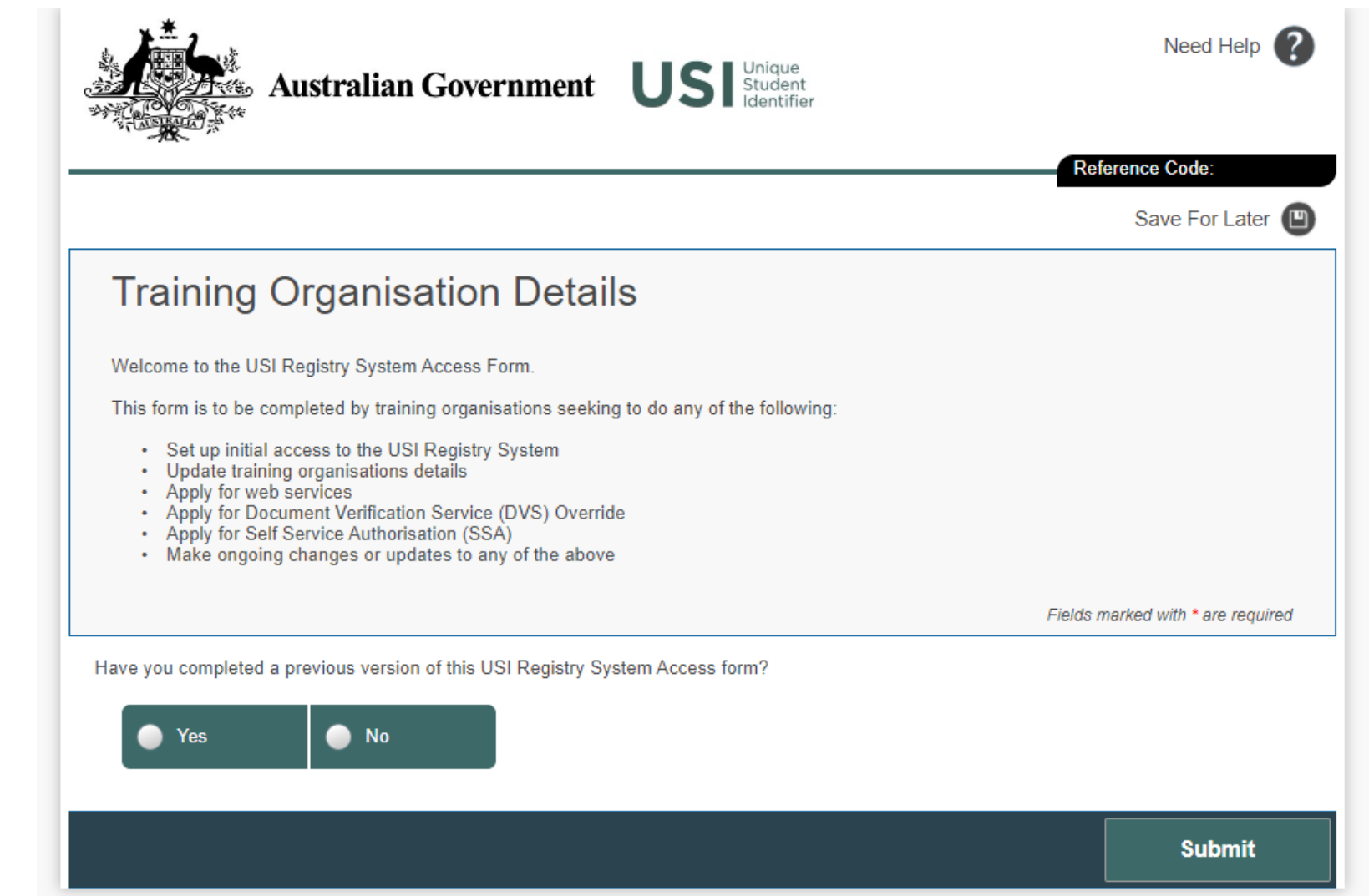
In order to perform USI related tasks within the SMS, you will first need to register your RTO on the **USI Taskforce Website**. Accessible via: <https://www.usi.gov.au/>

Select that you are a Training Body that wishes to perform USI related tasks. You are then looking to complete an item known as the **USI System Access Request Form**

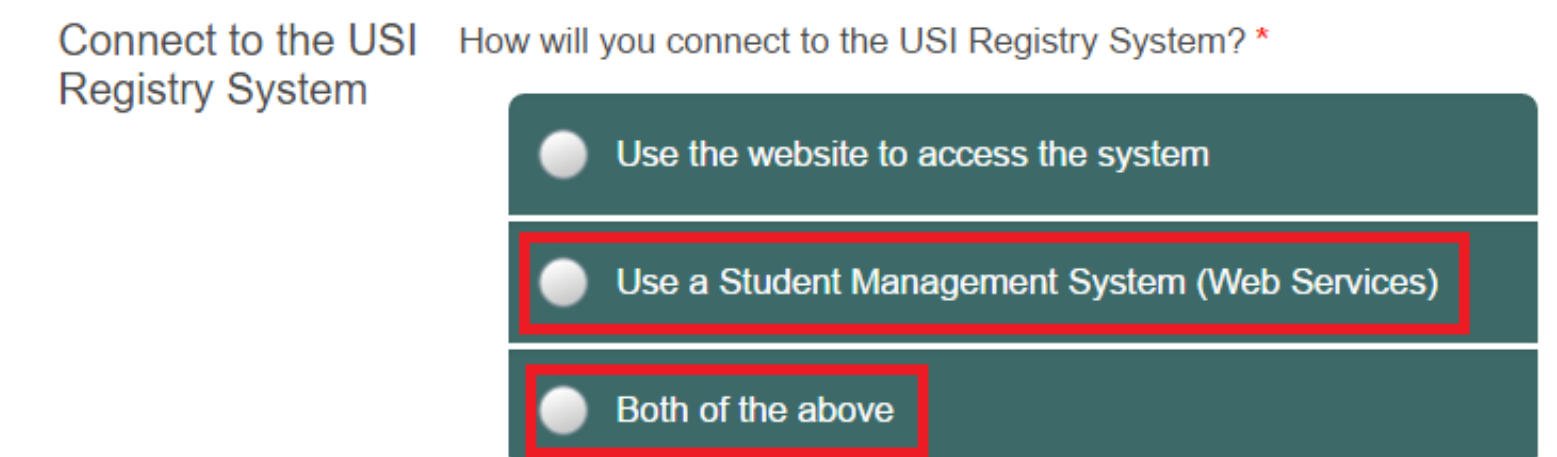
As you complete this form, you will be asked the following question - **'How will you connect to the USI Registry System**. Here please select either:

- **'Use a Student Management System (Web Services)'** or
- **'Both of the above'**

This allows the system to talk directly with the SMS.



The screenshot shows the 'Training Organisation Details' section of the USI Registry System Access Form. At the top, there is a header with the Australian Government logo, 'USI Unique Student Identifier', and a 'Need Help?' link. Below the header, there are fields for 'Reference Code' and 'Save For Later'. The main content area is titled 'Training Organisation Details' and contains a welcome message: 'Welcome to the USI Registry System Access Form. This form is to be completed by training organisations seeking to do any of the following:'. A bulleted list follows: 'Set up initial access to the USI Registry System', 'Update training organisations details', 'Apply for web services', 'Apply for Document Verification Service (DVS) Override', 'Apply for Self Service Authorisation (SSA)', and 'Make ongoing changes or updates to any of the above'. A note at the bottom right of the list states 'Fields marked with \* are required'. Below the list, there is a question: 'Have you completed a previous version of this USI Registry System Access form?'. There are two radio button options: 'Yes' and 'No'. At the bottom right, there is a 'Submit' button.



The screenshot shows the question 'How will you connect to the USI Registry System? \*'. There are three radio button options: 'Use the website to access the system', 'Use a Student Management System (Web Services)', and 'Both of the above'. The 'Use a Student Management System (Web Services)' option is highlighted with a red box, and the 'Both of the above' option is also highlighted with a red box.

# USI

## (2) Setting up myGovID / RAM

To create your personal [myGovID](#) you will need to visit the website and complete the steps. If you get stuck, please view these external resources:

- [Read how do I get setup](#)
- [Watch a video demonstrating and explaining the registration](#)

The Steps you need to follow include:

- Downloading the myGovID app to your smart device
- Entering your details (Name, Date of Birth, Email)
- Adding identity documents/information to verify your identity

Once these steps are complete, you will have a valid myGovID to use when signing into Government Websites.



## (3, 5) Accessing Relationship Authorisation Manager (RAM)

To link a business within RAM, the [principal authority](#) of the business will need to visit the [Relationship Authorisation Manager](#) and complete the steps:

- [You can read the steps here](#)
- [You can watch a video on the process here](#)

The Steps you need to follow include:

1. Log into RAM using your myGovID digital identity
2. Select Link my business – you will be redirected to the ATO to find your business or businesses
3. Add your postal or residential address (as held by the ATO) and click Continue
4. Select the business or businesses (where you are an eligible individual associate in the ABR) that you wish to link from the list and click Continue
5. Enter an email address and click Send Email to receive an authorisation code (the email address can be different to the one used to set up your digital identity, for example a work email address). Enter the code and then click Verify and Continue
6. View the summary of the selected business or businesses and select the checkbox to declare you understand and accept. Click Submit
7. A message will display confirming your business is successfully linked. Click Continue.



# USI

## (4, 6) USI Configuration within the SMS

To perform the steps on the previous slide, you will need to collect some information from your SMS

(4) To collect the details for the RAM notification, you will need to enter your Organisation code and ABN

Administration > Configuration > USI > Set Up

Once that has been done forward the **Unique Software ID** and Software Provider ABN to your Principal Authority

(6) The notification will come into the SMS and will validate the CAA setup to complete the connection.

CAA Register

Cloud software Authentication and Authorisation (CAA) is required to allow ReadyTech, the Software Provider, to securely communicate with the USI service on your behalf. Please provide the information below and then follow the provided steps to complete the setup.

\* Org Code:

The unique number that identifies your organisation in training.gov.au. Also known as the Registered Training Organisation (RTO) provider number, RTO training number, RTO number or TGA number.

\* ABN:

The Australian Business Number associated with your Org Code.

Register

USI Cloud Authentication & Authorisation (CAA)

Please add a Notification in the ATO Relationship & Authorisation Manager (RAM) to advise the Government that we may transact with USI on your behalf.

The **Principle Authority** of your business should go to

<https://authorisationmanager.gov.au/>

and "add a notification" following the instructions in

<https://info.authorisationmanager.gov.au/business-software-user-or-provider#My%20cloud%20software%20services>

The Principle Authority will need to provide:

Your Unique Software ID:

Software Provider ABN:

This step can only be completed by the Principle Authority for the organisation associated with your ABN

If you are not the Principle Authority, please provide them the above details and come back to this screen when complete.

Please Validate CAA Setup below when RAM notification is complete. If you are unable to complete RAM Notification at this time you can start the USI Authorisation process later, we have saved these details.

Validate CAA Setup

✔ Setup successfully validated.  
Please wait while you are being redirected back to  
[Click here](#) if nothing happens.



# Certificate Management



ReadyTech Education

# Certificate Management

Certificate are setup as (un-editable) templates within the system

You can modify the rules for the templates to ensure they issue when you desire (e.g. when certain criteria are met)

Administration > Templates > List All

## Completion award

The Completion Award field can be set for specific certificate templates

When enabled, any Certificates generated will have the Reportable field for the Certificate enabled

Entity: Plus Certificate v1.0 Edit | Letters & Forms Template

Buttons: Update, Cancel, Delete

Details:

- Name: Plus Certificate v1.0
- From: [Dropdown]
- Subject: [Text Field]
- Status: ☒ Enabled ☐ Disabled
- Format: ☒ HTML ☐ Text
- Type: [Dropdown]
- Layout: Clear: A4 Portrait
- Category: Certificate
- Document Category: Certificate
- Portal: ☐
- Completion Award: ☒
- Authorised User Group: [Text Field]

Additional fields (highlighted with red box):

- Type: Qualification
- Rule: All Units Completed
- Number Sequence: [Text Field]

Footer: This template contains custom code and cannot be modified. Please contact JR Plus Support if you wish to make any changes.



# Lets go do it!

Let's take a look at:

- Entering RTO details
- Updating Certificate rules







# Email and Single Sign On (SSO) Configuration

ReadyTech Education



# Email Configuration

## Mandrill

Having the ability to email your students is a crucial feature in a SMS

ReadySMS use Mandrill for email services

Your onboarding consultant can help you with setup



**MANDRILL**



# Single sign-on (SSO)

## SAML

SSO is an authentication method that enables secure authentication with multiple applications and websites by using just one set of credentials

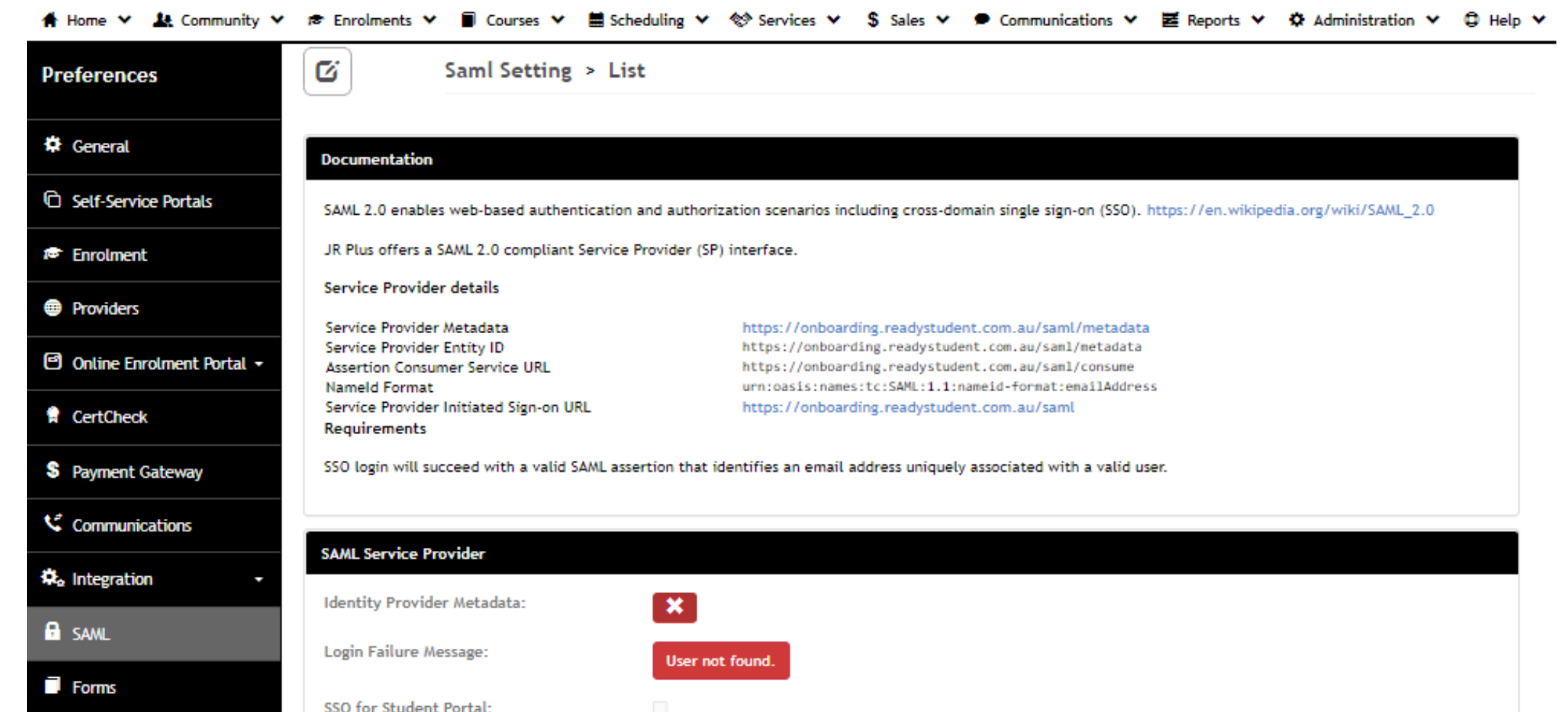
IT administrator will need to configure

They will require level 1 access

Administration > Configuration > Preferences > SAML

## What do we use for SSO?

Let your IT administrator know that we currently only support SAML



## Helpful Links

- Microsoft active directory hosted in Azura
  - [SAML authentication with Azure Active Directory](#)
- Google directory
  - [Set up SSO for your organization](#)



# Additional Site Setup



# Locations

Used to tag delivery sites for your courses

Mandatory to identify locations for both state and federal reporting

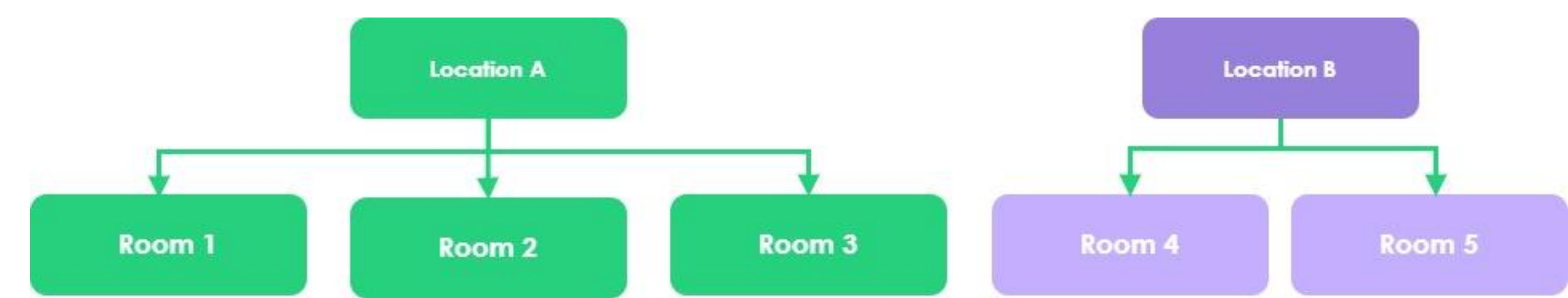
Administration > Lookups > Locations/Facilities

## Sublocations

Allow you to create secondary areas. For example, the Location could be a TAFE Campus, but the sublocation could be a specific building within the campus.

## Rooms

Add rooms according to your naming convention, e.g. R1, B102 etc.



Setup

Setup > Locations

Search:  Search

1 - 5 of 51 Page

Name	Description	Enabled	
Adelaide Office		<input checked="" type="checkbox"/>	
Launceston Office	TAS Office	<input checked="" type="checkbox"/>	
Melbourne CBD Office		<input checked="" type="checkbox"/>	
Perth Office		<input checked="" type="checkbox"/>	
Sydney Head Office		<input checked="" type="checkbox"/>	

1 - 5 of 51 Page

Setup > Details

Details

ID:

Location Code:

Name:

Description:

Address:

2

La

Launceston Office

TAS Office

93 YORK STREET  
LAUNCESTON Tasmania 7250  
Australia

Location Contact Number:

1800 838 872

Location Information:

Brand:

Available From:

Available To:

Settings

Enabled:

Claim Loading:

VET Student Loans:

Fee-Help:

Contact

Employer:

Surname:

First Name:

Phone:

Mobile:

Smith

Meg

03 63995566

0439045656



# State Funding Contracts (if required)

A funding contract may exist between the department and the training provider for delivering government-subsidised training under a formally recognised program.

Administration > Funding > Contracts

Contracts

+ New

Reload Schedules

Search:

Include disabled contracts

Search

Name	Code	State/Region	Program	Amount	Acquitted	Enabled
My Contract	123456789	Victoria	Skills First		<input type="checkbox"/>	<input checked="" type="checkbox"/>

New Contracts

Save

Cancel

Contract Details

\*Name:

Code:

\*State/Region:

Funding Source:

\*Program:

Schedule:

Start Date:

End Date:

Reporting Period:

Acquitted:

☐

Enabled:

☒

Description

://onboarding.readystudent.com.au/user/dashboard

# Numbering Schemes

The number schemes allows you to set your organisations preference relating:

- Party ID
- Certificate numbers
- Course Identifiers
- etc

# Administration > Configuration > Number Schemes

**Setup**

- Course Scope
- Unit Scope
- Outcome Types
- Number Schemes
- Search Messages
- Batch Log
- Batch Processes
- Note Template
- Locations
- Equipment
- Reference Data
- Contracts
- Compliance Data
- International Data
- Formats:**
- Images
- Layout

## Number Schemes

+ New

Name ▼	Description	Next Value	Date Reset
Agreement Identifiers	Defines the agreement identifiers for JobReadyRTO staff/trainers	AG[rto]00001	
Availability ID	Defines Availability ID numbering system	AV00001	
Avetmiss Identifiers	Defines the avetmiss identifiers for all claims and units reported to Avetmiss	VET[rto]00001	
Certificate Numbers	Defines the certificate numbers for JobReadyRTO	CERT00003	
Cohort ID	Defines Cohort ID numbering system	CO00001	
Course Application Indentifiers	Defines the course application identifiers for JobReadyRTO	CA00007	
Course Identifiers	Defines the course identifiers for all course offerings	CSE[rto]00012	
Credit Note ID	Credit Note ID	CR000001	
DEEWR Extract Identifiers	Defines the identifier for DEEWR data collection	DEEWR00001	
Enrolment Identifiers	Defines the enrolment identifiers for JobReadyRTO	EN[rto]00042	
Extension Request ID	Defines Extension Request ID numbering system	ER00001	
Family Payment ID	Defines Family Payment numbering system	FPI000001	
Family Payment Variation ID	Defines Family Payment Variation numbering system	FPV00001	
Feedback ID	Defines Feedback ID numbering system	FB000001	
Group Identifiers	Defines the Group Identifiers for JobReadyRTO	G00000001	

---

**Setup**

- Course Scope
- Unit Scope
- Outcome Types
- Number Schemes
- Search Messages
- Batch Log
- Batch Processes
- Note Template
- Locations
- Equipment
- Reference Data
- Contracts
- Compliance Data
- International Data
- Formats:**
- Images
- Layout

## Setup > Number Scheme Edit

\*Name:

Next Value:

Date Reset:

Description: 

Defines the party identifiers for JobReadyRTO

A B I U S

≡ ≡ ≡ ≡

Paragraph System Font 10pt

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— I<sub>x</sub> X<sub>2</sub> X<sup>2</sup> Ω

p

Name	Description	Formula	Values	Active
Basic Party Ids	A basic scheme for generating party Ids	{number(8)}	From <input type="text" value="1"/> to <input type="text"/>	<input checked="" type="checkbox"/>

Add another value range

# Outcome Preferences

You can add/edit the lists of outcomes that are built into your SMS or create a 100% custom list

Administration > Configuration > Outcome Types

Setup

Course Scope

Unit Scope

Outcome Types

Number Schemes

Search Messages

Batch Log

Batch Processes

Note Template

Locations

Equipment

Outcome Types Configuration

Name	Description
Academic Period	
Higher Ed	
National Reporting (Australia)	This is the standard set of outcomes for national reporting in Australia.
National Reporting Editable	Customise the national standard to your preferred internal outcomes, but map them back to the reportable national outcomes.
Unit of Study	These outcomes are to be used for reporting to HEPCAT for VET Student Loans and Fee-Help
WA Specific Reporting	These outcomes are specific for use when reporting in Western Australia - e.g. RAPT

Outcome Types Configuration Edit

National Reporting Editable

update

cancel

Name:

National Reporting Editable

Range Scoring:

☐

Description:

Customise the national standard to your preferred internal outcomes, but map them back to the reportable national outcomes.

Outcomes

Code	Name	Description	Reportable Outcome	Group 1	Group 2	Group 3	Ignore Prereqs	Trigger Invoice	Enrolled Outcome	Commencement Outcome	Lock Smart Fees	Enabled
C	Competent	Competency achieved	20 - Competent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
N	Not Competent	Competency not achieved	30 - Not Competent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
71	Continuing enrolment	Continuing enrolment	71 - Continuing enrolment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
W	Withdrawn/dropped	Withdrawn/dropped	40 - Withdrawn/dropped	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
R	RPL - granted	Recognition of prior learning - granted	51 - RPL - granted	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rx	RPL - not granted	Recognition of prior learning - not granted	52 - RPL - not granted	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>



# Lets go do it!

Let's take a look at:

- Adding locations
- Entering funding contracts
- Updating
  - Numbering schemes
  - Outcome types







# Branding/Theme



# Theme

## Images

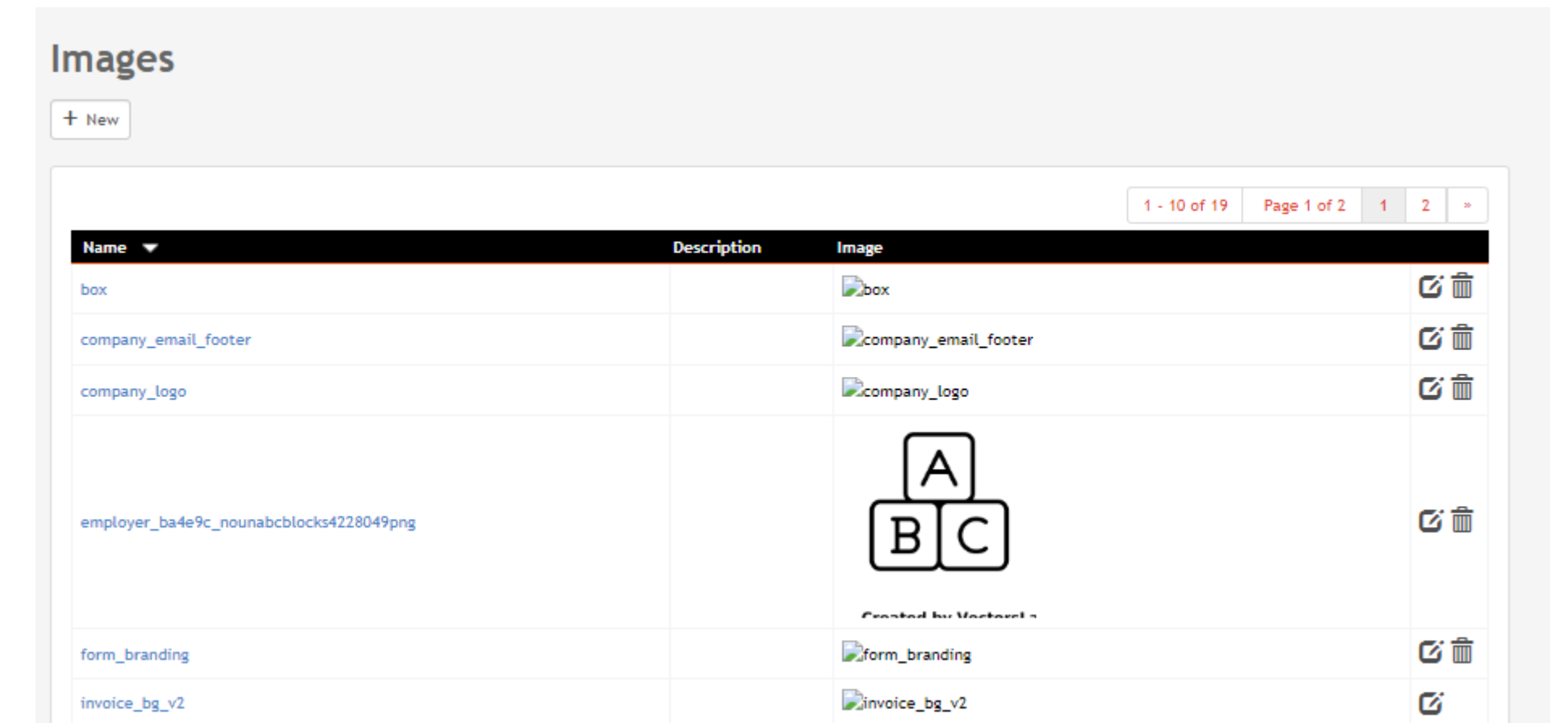
When adding/updating images in the SMS, you will be asked to select from a bank of preloaded images

You can add images to this bank through:

[Administration > Templates > Images](#)

### Helpful FYI's for images:

- Name your images something that will aid later identification
- Use lowercase names only
- Acceptable file types include jpg, jpeg, gif, png
- We recommend uploading an image with a transparent background for results



The screenshot shows the 'Image New' form. At the top, there is a 'Format > Image New' header. Below it, there are 'create' and 'cancel' buttons. The form has three main sections: 'Name:' with a text input field, 'Description:' with a text input field, and 'Image:' with a 'Choose file' button and 'No file chosen' text. At the bottom, there are 'create' and 'cancel' buttons.



# Theme

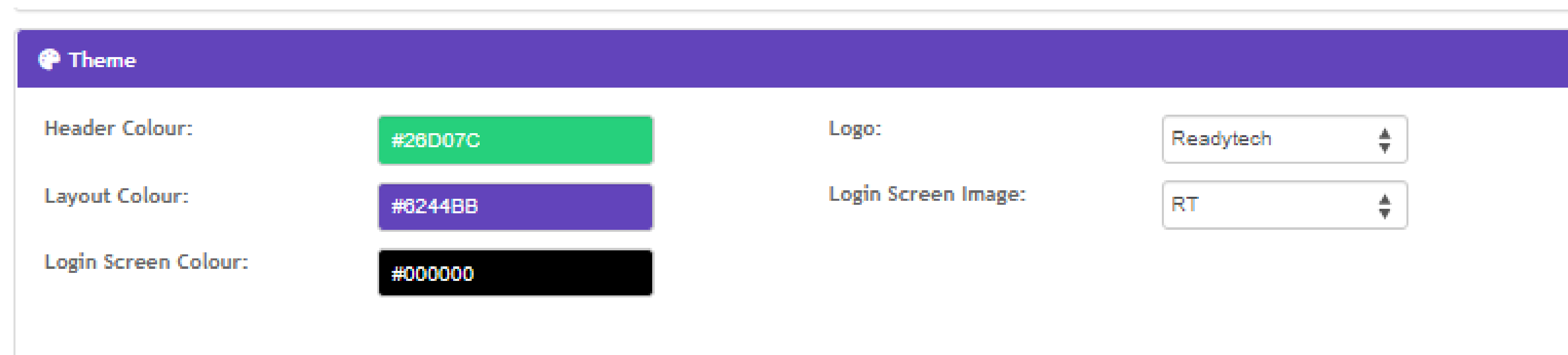
## Site Theme

Overall Site theme allows you to adjust

- Colour
- Logo
- Overall site feel

Administration > Configuration > Preferences > edit

Helpful Hint: Be careful with Layout Colour. Making this white or light grey makes it very difficult to read text.



The screenshot shows a 'Theme' configuration window with a purple header bar. Below the header, there are two columns of settings. The left column contains three color selection fields: 'Header Colour' with a green swatch and hex code #28D07C, 'Layout Colour' with a purple swatch and hex code #6244BB, and 'Login Screen Colour' with a black swatch and hex code #000000. The right column contains two dropdown menus: 'Logo' with 'Readytech' selected and 'Login Screen Image' with 'RT' selected. Each dropdown has a small up/down arrow icon.

Theme	
Header Colour:	#28D07C
Layout Colour:	#6244BB
Login Screen Colour:	#000000
Logo:	Readytech
Login Screen Image:	RT





# Branding

Brands can be used to customise your courses, template and forms





Administration > Configuration > Branding

## Why is this useful?

Additional brands can be useful for collaborations when co-branding is necessary

Brands

+ New

Name	Description	External ID	Logo	Header Colour	Layout Colour	
Form Branding				#ffffff	#ffffff	 <input checked="" type="checkbox"/>
RT				#000000	#ffffff	 <input checked="" type="checkbox"/>

Edit Brand

Name

RT

Description

External ID

Logo:

RT

Header Colour:


#000000

Layout Colour:

#ffffff

Brand Status:

☒



Save

Cancel

# Lets go do it!

Let's take a look at:

- Adding an image
- Updating the theme





# Summary

## What have we done today?

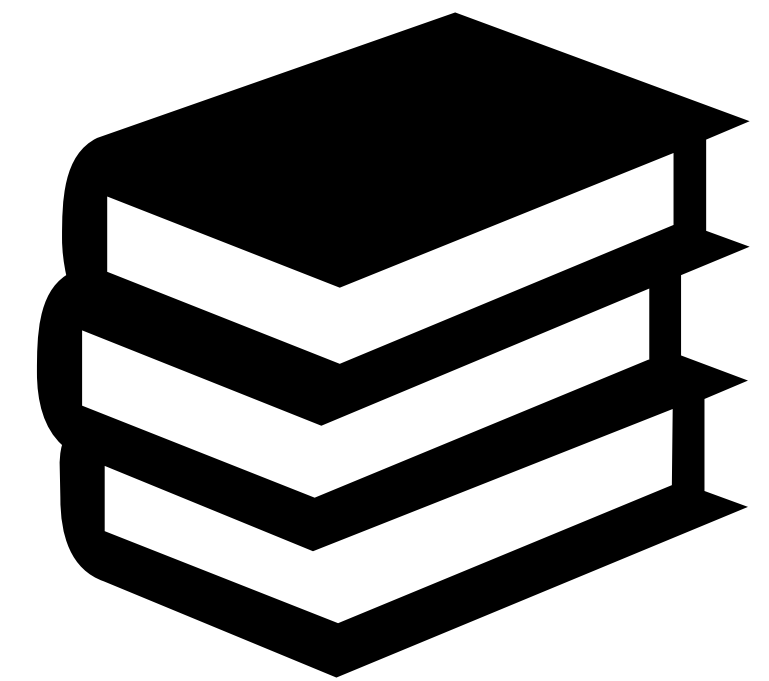
- Updating RTO details
- Setup of USI to allow for USI verification within the SMS
- Certificate management
- Email and SSO configuration
- Adding Locations
- Entering Funding contracts (if required)
- Updating both the numbering schemes and outcome preferences
- Theme and Branding



# Action Items

## What do I need to do after today's session?

- Update the RTO organisation details and enter RTO ID
- Add all the RTO's locations
- Update outcomes to ensure they are all correct
- Setup SSO (optional)
- Reach out to Onboarding to configure emails
- Add any funding contracts into the system (if required)
- Update the branding/theme
  - Add logo
  - Set theme
  - Create brands (if required)



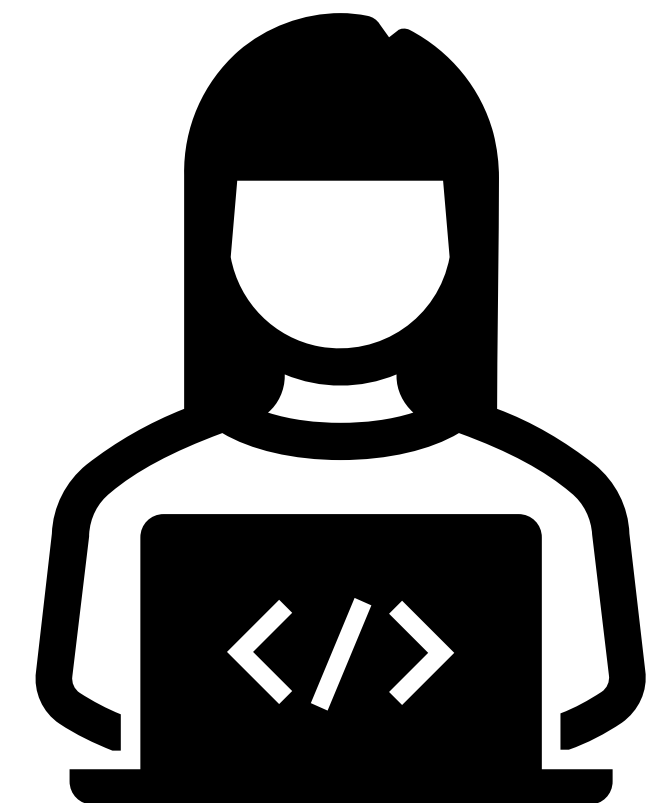


# Enjoyed today's session?

[Please navigate to article here](#)

Here you will find all the information and resources for this series

- A copy of the PowerPoint slides
- Links for resources relevant to today's session
- Details on the materials required for upcoming sessions
- Booking links for upcoming sessions
- Recordings from today and previous sessions



# Thank you

For more information please contact:

## Support

- E: [support@ewp.readytech.io](mailto:support@ewp.readytech.io)
- P: 02 9018 5525

## Onboarding

- E: [customeronboarding@ewp.readytech.io](mailto:customeronboarding@ewp.readytech.io)