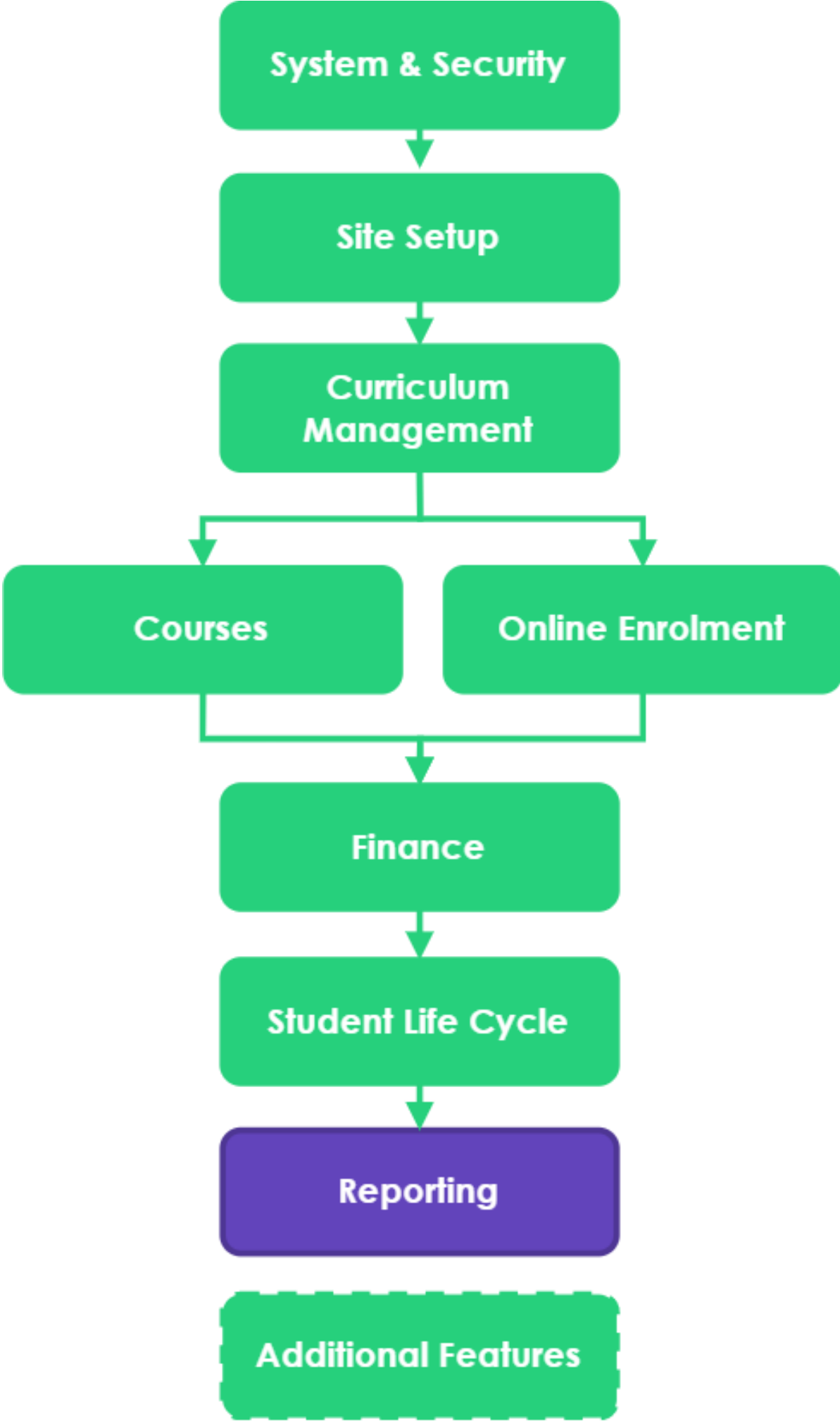


# Topic 8 - Reporting



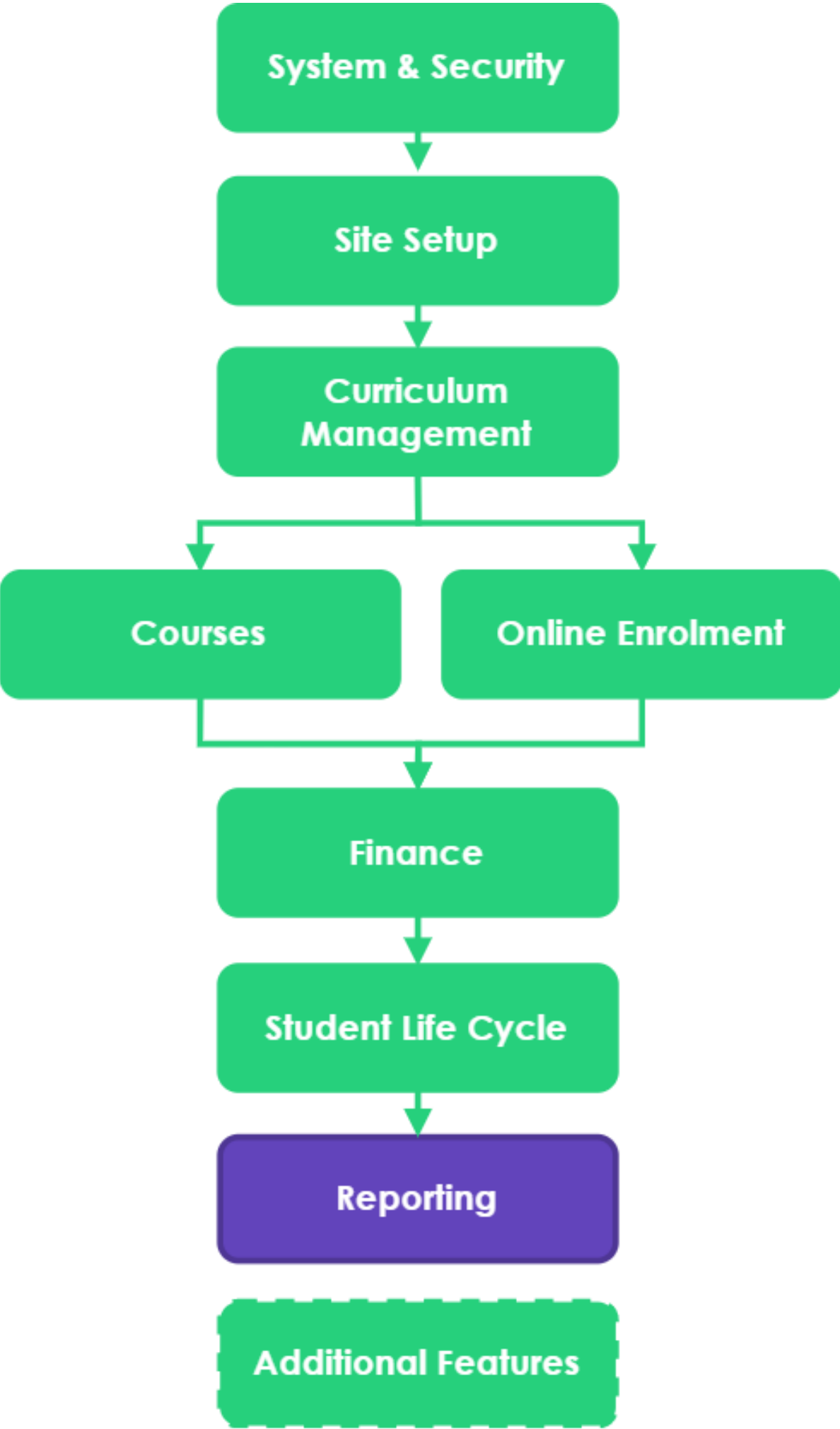
# Agenda



## Topics Covered

- 1 National reporting
- 2 Generating national AVETMISS files
- 3 Simple troubleshooting
- 4 Contacting Support
- 5 Standard reports within the system
- 6 Report Builder

# Agenda



## Learning Objectives

- |   |   |
|---|---|
| 1 | To perform an AVETMISS export from the SMS  |
| 2 | To understand how to get support and what should be supplied during an assistance request |
| 3 | To run a standard reports   |
| 4 | To build and run a simple custom report   |





# National Reporting



# What

## What is AVETMISS?



All Registered Training Organisations (RTOs) must collect and report 'Total VET Activity' data for any nationally recognised training delivered which represents student academic activity (eg. Enrolments and activities)

Failure to report Total VET Activity can result in your RTO registration being revoked by your VET Regulator!

Total VET Activity data is reported using the Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS) file format, in accordance with the National VET Data Policy

The AVETMISS Fact Sheet is a useful recourse to review to learn more:  
<https://www.ncver.edu.au/rto-hub/rto-fact-sheets>



# When

## When do you report?



Reporting frequency depends on your funding agreements

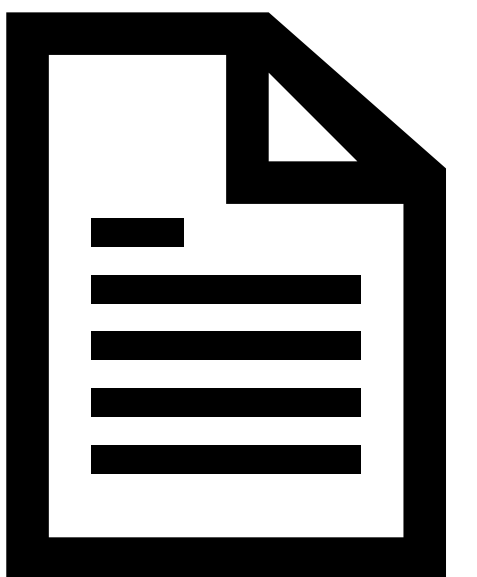
You must report your fee-for-service activity directly to National Centre for Vocational Education Research (NCVER) at least annually. Typically, there will be specific requirements for that contract regarding reporting.

NCVER will also accept quarterly submissions which are cumulative.

This has the benefit of:

- Dealing with smaller data sets frequently
- Student USI transcripts are updated regularly

[https://www.ncver.edu.au/\\_\\_data/assets/pdf\\_file/0020/2455400/NCVER\\_DMS-192642-v20-CS\\_Fact\\_Sheet\\_-\\_Quarterly\\_Reporting.pdf](https://www.ncver.edu.au/__data/assets/pdf_file/0020/2455400/NCVER_DMS-192642-v20-CS_Fact_Sheet_-_Quarterly_Reporting.pdf)



# Who

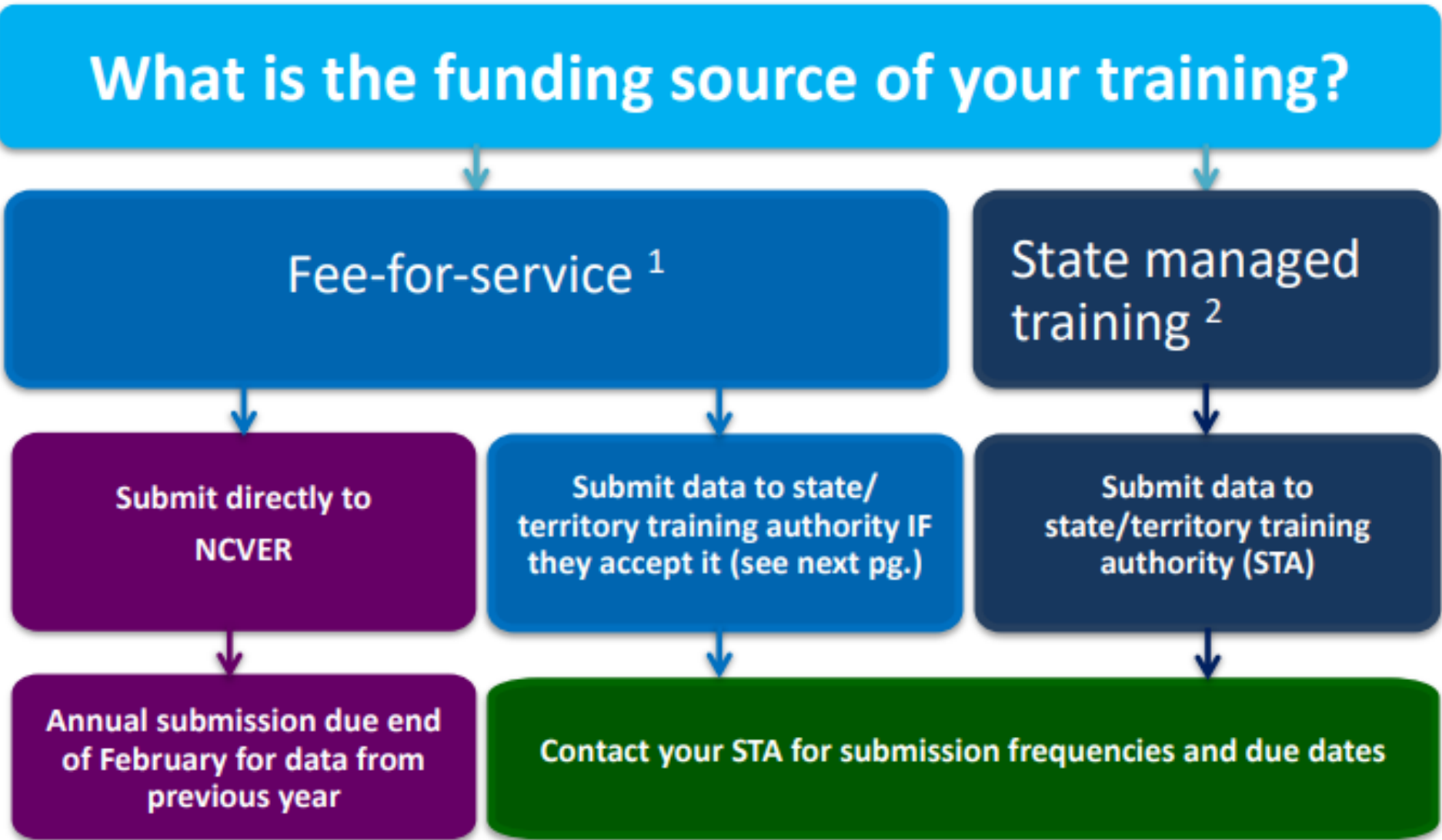
## Who do I report my AVETMISS data to?

This NCVER fact sheet is a good resource for determining when, where and who to report your AVETMISS data to

[Download here](#)

### Where, when and how do I report my AVETMISS data?

This fact sheet helps you determine where, when and how to report your AVETMISS data.



<sup>1</sup> **Fee-for-service training**- all non-state managed training including enterprise and other privately funded training, training paid for by the client or training directly funded and managed by the Commonwealth.

<sup>2</sup> **State managed training**- training funded or administered by the state or territory.

# Why

## Why is this data collected?

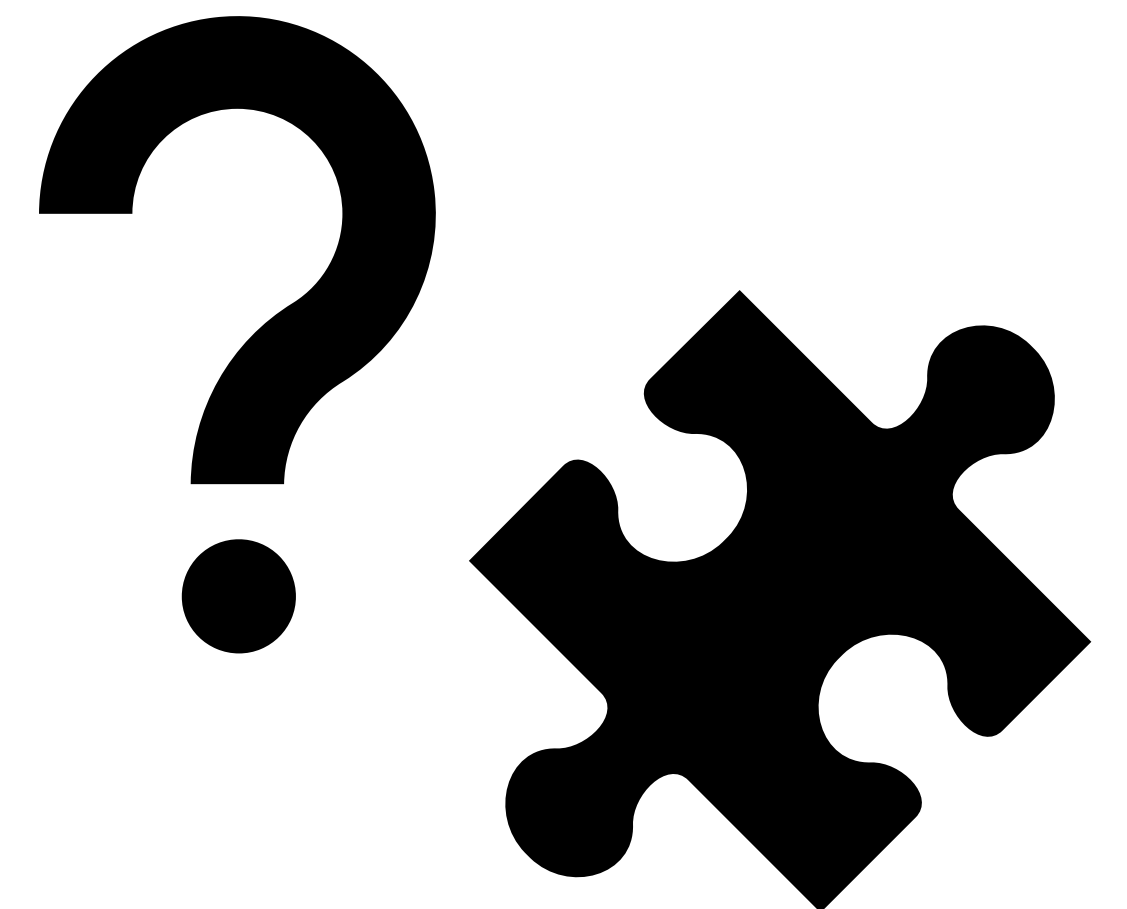
The NCVER is responsible for collecting, managing, analysing and communicating research and statistics on the Australian VET sector

NCVER collects this data through several statistical collections and surveys

They produce reports to summarise the whole sector

Their research informs and influences the VET policy and practice for the Australian government, training providers, industry organisations and peak bodies.

This also allows them to preserve the integrity of the Australian VET sector.



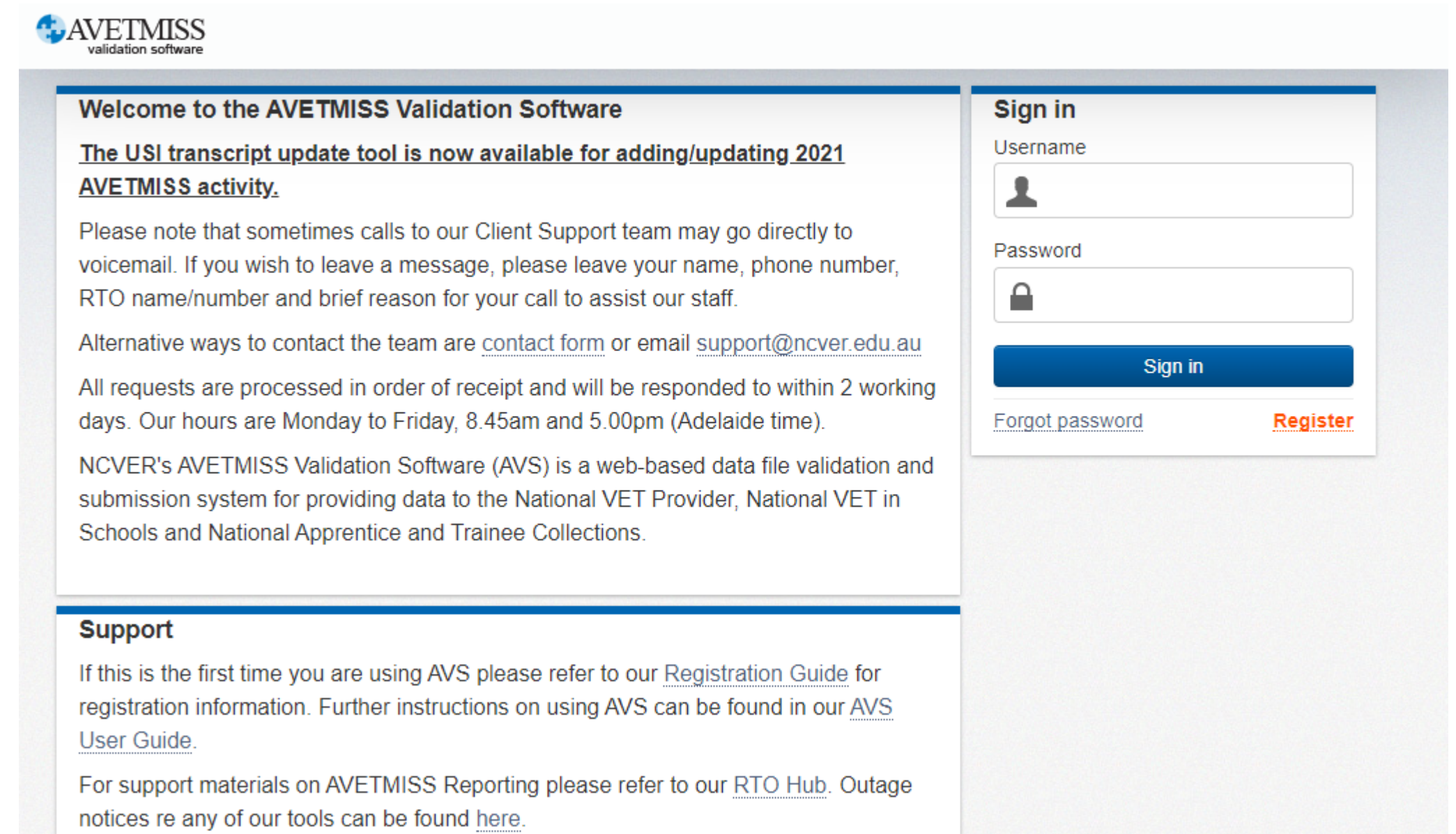
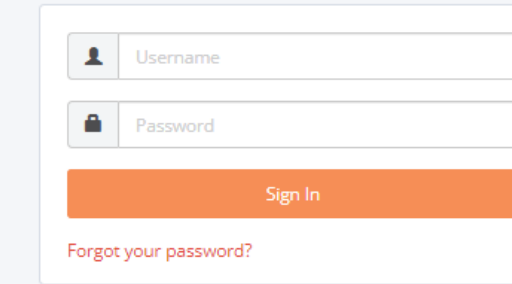


# Where

## Where do you report?

In order to report data against the AVETMIS standard you will need:

1. A student management system (SMS) which can produce AVETMISS files  
*\*that's us!*
2. An account to upload your data through the [AVETMISS Validation Software \(AVS\)](#)



**AVETMISS**  
validation software

**Welcome to the AVETMISS Validation Software**

**The USI transcript update tool is now available for adding/updating 2021 AVETMISS activity.**

Please note that sometimes calls to our Client Support team may go directly to voicemail. If you wish to leave a message, please leave your name, phone number, RTO name/number and brief reason for your call to assist our staff.

Alternative ways to contact the team are [contact form](#) or email [support@ncver.edu.au](mailto:support@ncver.edu.au)

All requests are processed in order of receipt and will be responded to within 2 working days. Our hours are Monday to Friday, 8.45am and 5.00pm (Adelaide time).

NCVER's AVETMISS Validation Software (AVS) is a web-based data file validation and submission system for providing data to the National VET Provider, National VET in Schools and National Apprentice and Trainee Collections.

**Support**

If this is the first time you are using AVS please refer to our [Registration Guide](#) for registration information. Further instructions on using AVS can be found in our [AVS User Guide](#).

For support materials on AVETMISS Reporting please refer to our [RTO Hub](#). Outage notices re any of our tools can be found [here](#).

**Sign in**

Username

Password

[Forgot password](#) [Register](#)

# How

## Generate National AVETMISS files within the SMS

Administration > Funding > AVETMISS Reporting

Select information based on your reporting needs, noting key elements like state/region and activity year

Note: If reporting direct to NCVER, DO NOT check the state specific NAT data element check box

The bottom filter option allows you to pull records for an individual student or enrolment

The screenshot displays the 'AVETMISS Extract' interface. At the top, a progress bar shows four steps: 'OPTIONS' (active), 'WARNINGS', 'CONFIRM', and 'EXPORT'. Below this, a 'Cancel' button is on the left and a 'Next' button is on the right. A message states: 'The AVETMISS Extract can provide you with the full NAT files based on the filters nominated below. This extract does NOT form a claims history/record on the student enrolment.'

The 'Reporting Data' section contains the following fields:

- State/Region:** A dropdown menu set to 'All States/Regions'.
- Date Type:** Radio buttons for 'Activity year' (selected) and 'Date range'.
- Activity year:** A dropdown menu set to '2023'.
- Contract:** A list box with options: 'Select all', '2021-2022 FY (20212022FY)', '2023Contract (2023RTO2023)', and 'My Contract (123456789)'. The 'Select all' option is currently selected.
- State-specific NAT data elements:** A checkbox that is currently unchecked. This checkbox is highlighted with a red rectangular box.
- Include only enrolments with claiming enabled:** A checkbox that is currently unchecked.
- Include enrolments without a contract:** A checked checkbox.
- Manually select NAT files:** An unchecked checkbox.

The 'Filters' section at the bottom includes a message: 'For advanced users only. These filters should only be used if you have a specific reporting need that requires additional filtering of the resulting data.' Below this is a checkbox for 'Enrolment' and a 'Filter' button with an information icon. 'Cancel' and 'Next' buttons are also present at the bottom of the form.

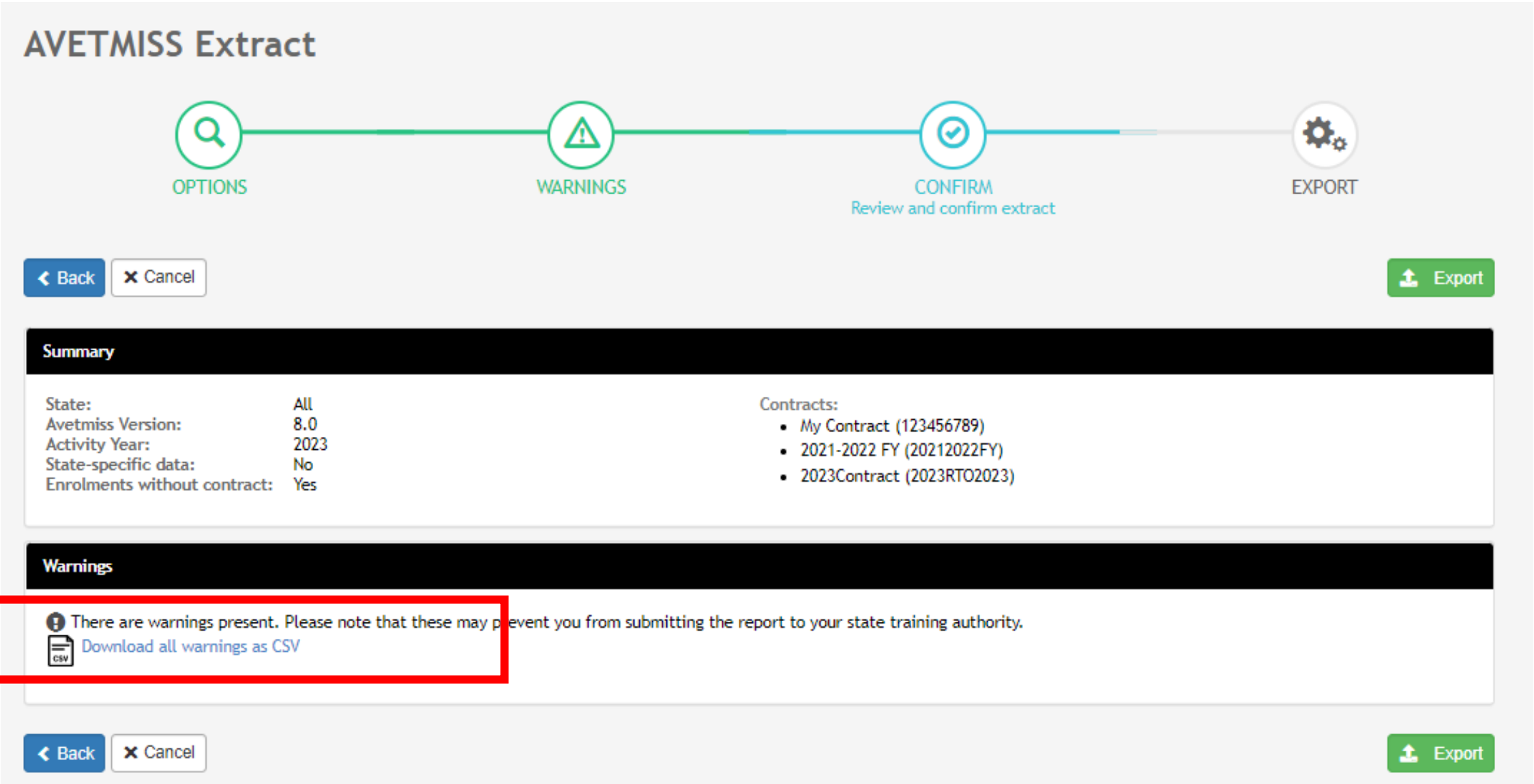
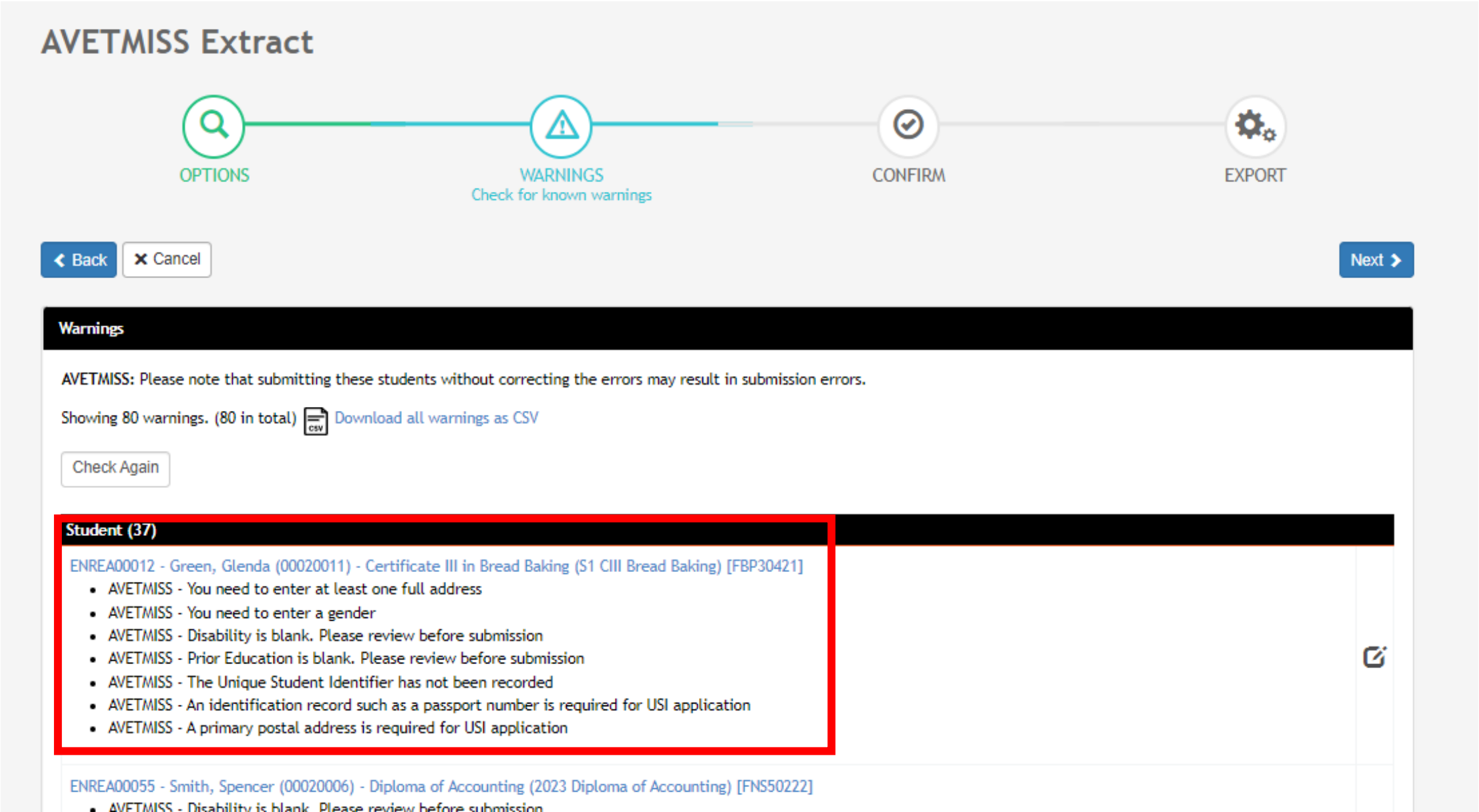
# How

## Generate National AVETMISS files within the SMS

### Check for warnings

Note: the internal system checks are not exhaustive, the final source of truths is your submission to the department

### Confirmation Page



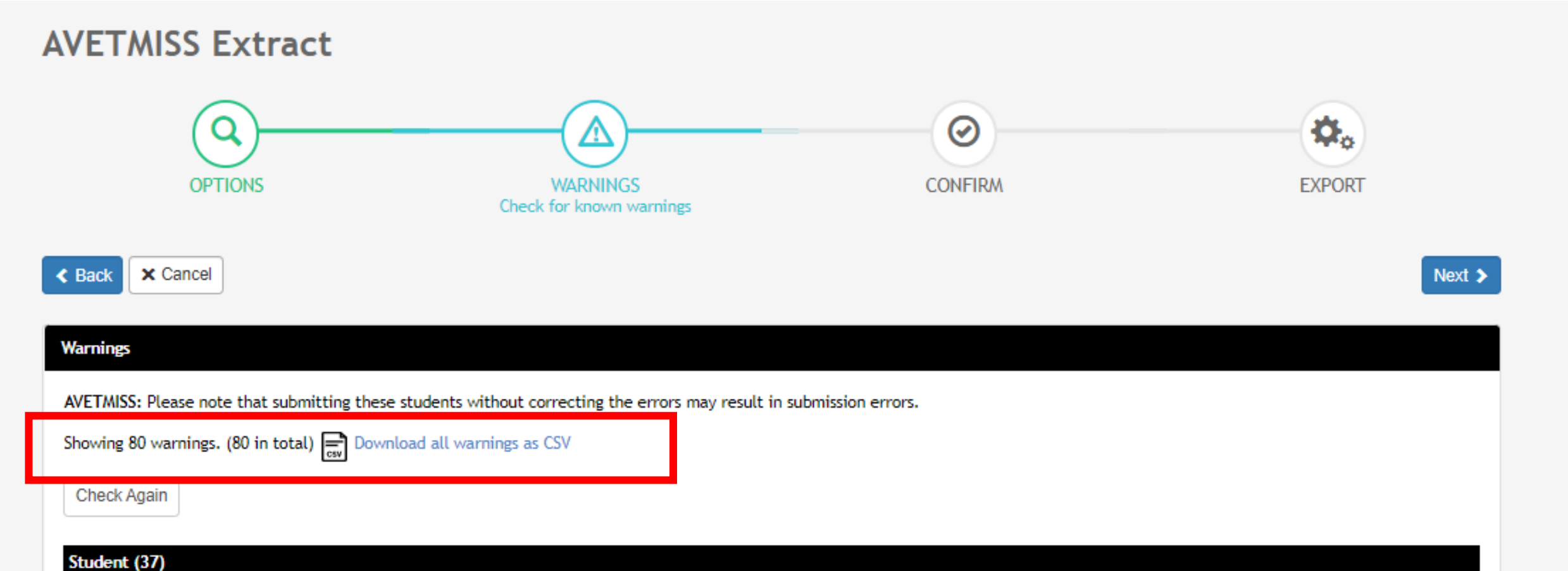


# How

## Download all warnings as a CSV

The CSV which opens in excel

There are links/URLs you can uses to take you to the records to help you review



T3

<

# How

## Generate National AVETMISS files within the SMS

Export

**AVETMISS Extract**

Progress bar with four steps: OPTIONS, WARNINGS, CONFIRM, and EXPORT. The EXPORT step is highlighted with a red box.

**Creation Status**

✓ The report has been generated.

Filename: avetmiss8\_1679453097.zip

# How

## Upload to AVS

Take the Zip files from the SMS and upload them into AVS.

<https://avs.ncver.edu.au/avs/>

From there you can:

- Validate your files
- Submit your files

AVETMISS Extract

OPTIONS

WARNINGS

CONFIRM

EXPORT

Creation Status

✓ The report has been generated.

Filename: avetmiss8\_1679453097.zip

AVETMISS  
validation software

Welcome to the AVETMISS Validation Software

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Sign in

Username

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Sign in

[Forgot password](#)

[Register](#)

Support

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For support materials on AVETMISS Reporting please refer to our [RTO Hub](#). Outage notices re any of our tools can be found [here](#).

AVETMISS  
validation software

Collections

Reports

Admin

Sign out

Collection processing

Home / History / Processing

Collection Details

Organisations

bridgette.kaminski@readytech.io

Type

VET Provider Collection

Year

2022

Period

Jan-Dec

AVETMISS Version

8.0

Collection Period

01/01/2022 - 31/12/2022

Allow continuing outcomes for activity ending this year

☐

Add Files

Preliminary Checks

Validate

Finalise Submission

Submission Files


File Id	File Name	Records	Status	
NAT00010	Training Organisation	1	Error	<input type="checkbox"/>
NAT00020	Training Organisation Delivery Location	1	Validated	<input type="checkbox"/>
NAT00030	Program	2	Validated	<input type="checkbox"/>
NAT00060	Subject	15	Validated	<input type="checkbox"/>
NAT00080	Client	4	Error	<input type="checkbox"/>
NAT00085	Client Contact Details	4	Error	<input type="checkbox"/>
NAT00090	Disability	0	Validated	<input type="checkbox"/>
NAT00100	Prior Educational Achievement	0	Validated	<input type="checkbox"/>
NAT00120	Training Activity	35	Error	<input type="checkbox"/>
NAT00130	Program Completed	3	Error	<input type="checkbox"/>

Export Summary

Export Details

Export AVS Rules

Remove Selected



ReadyTech Education 341



# Tips



- **Do NOT leave it until the last minute**
- Validate as soon as the bulk of your data entry has been done
- It's a lot easier to fix a hand full of errors as you go then all at the end of the year
  - You can validate within AVS without submitting
- Quarterly reporting AVETMISS data has benefits of:
  - Students will have their USI transcripts updated more frequently (activity usually appears within 3 days of submission)
  - Quarterly submissions are cumulative. This allows RTOs to add new data for their most recent quarterly activity and make corrections to previously submitted data if necessary
  - Validation errors are identified and fixed throughout the year making end of year reporting less onerous

# Lets go do it!

Let's take a look at:

- Generating national AVETMISS files within the SMS





# Simple Troubleshooting



# Simple Troubleshooting

## Enrolment – Reporting checked

If you are expecting an enrolment/student to show up in your report, but it's not:

- Navigate to the enrolment and check its been marked to report

### Note!

This is for both full qualifications and single units of competency

Enrolment > select enrolment

2023 AdDip Building Design CSERE00024 Update Cancel

**Main**

Course number:	CSERE00024	*Start Date:	16/2/2023
Name:	2023 AdDip Building Design	*End Date:	14/2/2024
AVETMISS Code:	CPP60421	Allow Enrolments:	<input checked="" type="checkbox"/>
Program:	Advanced Diploma of Building Design	Enrolment Start:	16/2/2023
Course Status:		Enrolment End:	29/6/2023
Tags:		*Max Enrolments:	30
Location:		*Min Enrolments:	1
Cost Centre:		Rating:	☆☆☆☆☆
*State/Region:	Victoria	Brand:	

**Resources**

Coordinator:	Trainer TBA	Academic:	Tim Tywin
Assessor:	Tom Thomas	Other Academic:	
Company Linked:	<input type="checkbox"/>	Agent Linked:	<input type="checkbox"/>

**Settings**

Report:	<input checked="" type="checkbox"/>	*Delivery Mode:	Combination of all modes
---------	-------------------------------------	-----------------	--------------------------

First Aid April CSERE00028 Update Cancel

**Main**

Course number:	CSERE00028	*Start Date:	1/4/2023
Name:	First Aid April	*End Date:	28/4/2023
AVETMISS Code:	HLTAID011	Allow Enrolments:	<input checked="" type="checkbox"/>
Program:	Provide First Aid	Enrolment Start:	3/3/2023
Course Status:		Enrolment End:	28/4/2023
Tags:		*Max Enrolments:	40
Location:	Launceston Office	*Min Enrolments:	0
Cost Centre:		Rating:	☆☆☆☆☆
*State/Region:	Tasmania	Brand:	

**Resources**

Coordinator:	Tim Tywin	Academic:	Tim Tywin
Assessor:	Tully Tywin	Other Academic:	Bridgette Trainer
Company Linked:	<input type="checkbox"/>	Agent Linked:	<input type="checkbox"/>

**Settings**

Report:	<input checked="" type="checkbox"/>	*Delivery Mode:	Internal only
---------	-------------------------------------	-----------------	---------------

# Simple Troubleshooting

## Enrolment – End date

Check the start/end date of the enrolment

Only dates within the current reporting year will display within the NAT file

Start date last year + end date this year = **reported**

Start date and end date last year = **not reported**

**First Aid April** CSEREA00028 Update Cancel

**Main**

Course number:	CSEREA00028	*Start Date:	1/4/2023 <span>i</span>
Name:	First Aid April	*End Date:	28/4/2023 <span>i</span>
AVETMISS Code:	HLTAID011	Allow Enrolments:	<input checked="" type="checkbox"/>
Program:	Provide First Aid	Enrolment Start:	3/3/2023
Course Status:	<span>▼</span>	Enrolment End:	28/4/2023
Tags:		*Max Enrolments:	40

**2023 AdDip Building Design** CSEREA00024 Update Cancel

**Main**

Course number:	CSEREA00024	*Start Date:	16/2/2023 <span>i</span>
Name:	2023 AdDip Building Design	*End Date:	14/2/2024 <span>i</span>
AVETMISS Code:	CPP60421	Allow Enrolments:	<input checked="" type="checkbox"/>
Program:	Advanced Diploma of Building Design	Enrolment Start:	16/2/2023
Course Status:	<span>▲</span>	Enrolment End:	29/6/2023



# Getting Help



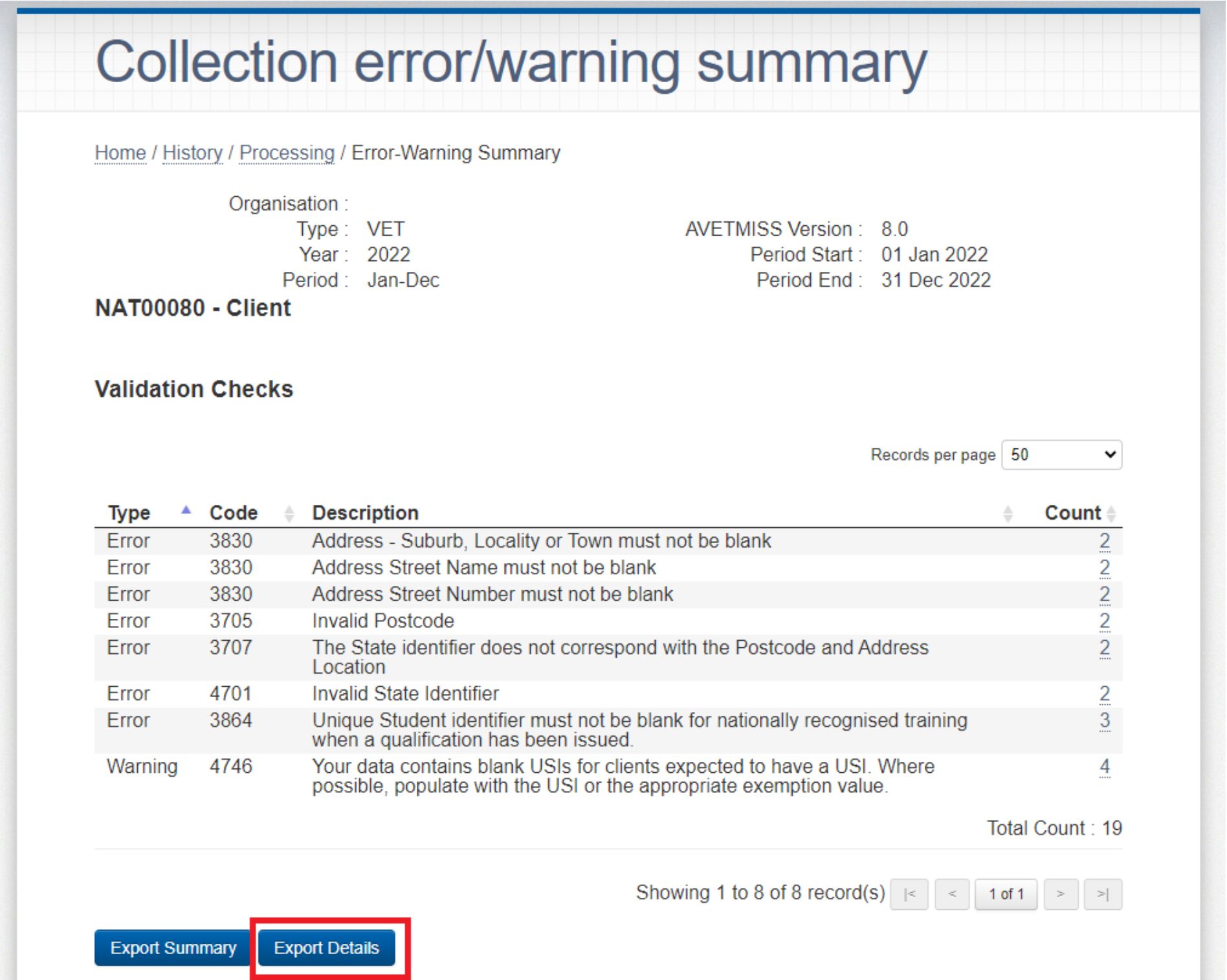
# Contacting Support

[support@ewp.readytech.io](mailto:support@ewp.readytech.io)

Always give as much detail as possible

## What should you include:

- A copy of the export details report you received from AVS
- URLs to records you would like us to look into
- What you selected when running the AVETMISS report within the SMS
- A copy of the AVETMISS files you submitted by providing a link to the Batch log that has been generated



### Collection error/warning summary

[Home](#) / [History](#) / [Processing](#) / Error-Warning Summary

Organisation :  
Type : VET  
Year : 2022  
Period : Jan-Dec

AVETMISS Version : 8.0  
Period Start : 01 Jan 2022  
Period End : 31 Dec 2022

**NAT00080 - Client**

#### Validation Checks

Records per page 50

Type	Code	Description	Count
Error	3830	Address - Suburb, Locality or Town must not be blank	2
Error	3830	Address Street Name must not be blank	2
Error	3830	Address Street Number must not be blank	2
Error	3705	Invalid Postcode	2
Error	3707	The State identifier does not correspond with the Postcode and Address Location	2
Error	4701	Invalid State Identifier	2
Error	3864	Unique Student identifier must not be blank for nationally recognised training when a qualification has been issued.	3
Warning	4746	Your data contains blank USIs for clients expected to have a USI. Where possible, populate with the USI or the appropriate exemption value.	4

Total Count : 19

Showing 1 to 8 of 8 record(s)

[Export Summary](#) [Export Details](#)

# Batch Logs

It's possible to review previous AVETMISS exports using batch log

Admin > Audit/Logs > Batch Logs

Filter by type AVETMISS Extract

When reaching out to Support for AVETMISS help, include the URL to the Bach log in question

This will allow our Support team to better aid you

### Batch Log

Status

Type

Filters Saved Filters

AVETMISS Extract

Search Save Clear

1 - 3 of 31 Page

ID	Enqueued	Finished	Status	Type	User	File
126800	21/2/2023 03:34:38 PM	21/2/2023 03:34:39 PM	Completed Successfully	AVETMISS Extract	Bridgette Kaminski	avetmiss8_1676954078.zip
119848	8/12/2022 12:04:13 PM	8/12/2022 12:04:14 PM	Completed Successfully	AVETMISS Extract	Bridgette Kaminski	avetmiss8_1670461453.zip
119847	8/12/2022 12:01:02 PM	8/12/2022 12:01:04 PM	Completed Successfully	AVETMISS Extract	Bridgette Kaminski	avetmiss8_1670461262.zip

1 - 3 of 31 Page

# Example email

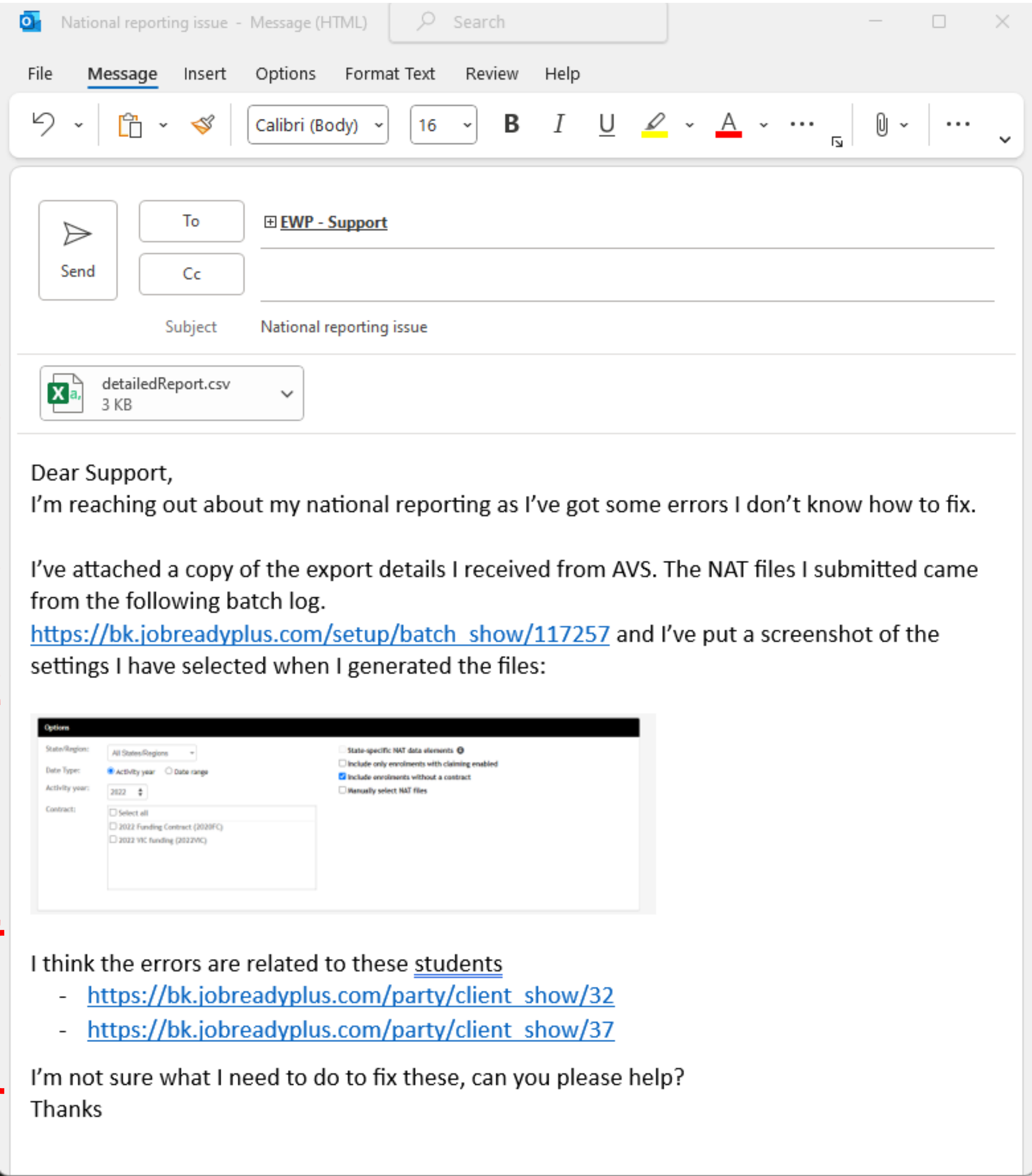
Here is an example of an ideal **Support Request** email for Reporting

Attached export details report from AVS

A copy of the AVETMISS files you submitted via batch Log

What has been selected what running the AVETMISS report

URLs to records, you would like us to look





# Lets go do it!

Let's take a look at:

- Batch logs





# Standard Reporting

# Reports Within Lists

There are options to review data within the system itself - a mini reporting tool

Within here you can:

- 1. Export the data
- 2. Update column options
- 3. Filter data
- 4. Perform bulk actions

Enrolments

+ New

Search

Student Name, Surname, ID, Known By, USI, Jobseeker ID

Filters

Saved Filters

Search

Save

Clear

Export

Search Results

Bulk Actions

1 - 7 of 71 Page

Enrolment ID	Party ID	Name	Course	Start Date	Target End Date	Employer	Agent	Provider	
	00020011	Glenda Green	Certificate III in Bread Baking (S1 CIII Bread Baking)	1/12/2022	1/12/2023			ReadyTech Education	
	00020011	Glenda Green	Certificate III in Business (2023 Cert III Business)	16/1/2023	16/1/2024			ReadyTech Education	
	00020019	Sam Stark "Tony"	Certificate III in Business (2023 Cert III Business)	16/1/2023	16/1/2024			ReadyTech Education	
	00020019	Sam Stark "Tony"	Advanced Diploma of Building Design (2023 AdDip Building Design)	24/1/2023	18/6/2024			ReadyTech Education	
	00020019	Sam Stark "Tony"	Certificate III in Bread Baking (S1 CIII Bread Baking)	1/12/2022	1/12/2023			ReadyTech Education	




# Standard Reporting

Standard reports are pre-made reports that are available within the SMS


These allow you to run common queries and uses filters to view results

Reports > Standard Reports


Reports

 Academics


- Academic Detail
- Academic Matrix
- Academic Matrix: Enrolment Level
- Academic Performance

 Administration


- Certificates
- Notes

 Agents


- Agent Commissions
- Agent Referrals

 Course


- Attendance
- Course Progress
- Events

 Financial


- Attributable Revenue
- Deferred Revenue
- Expected and Actual Revenue
- Financial Reconciliation
- Outstanding Invoices

 Funding


- Contract Overview
- Enrolment Claims Overview
- Outstanding Claims

 Overview

- Top Courses
- Top Employers
- Top Students

 Students

- Enrolment Status
- Student Completions
- Student Overview
- Student Progress
- Student Health Insurance

 Custom Reports

- List All

# Lets go do it!

Let's take a look at:

- Look at reports within the list view
- Standard reports







# Report Builder





# Report Builder

## How to start?



Always start with the business question you are trying to answer

Examples:

- I am looking for a list of students who are at risk and doing the Diploma of Business Course
- I am looking for a list of students who completed HLTAID011 Provide First Aid between two dates

Build the report step by step, filtering down the data until you get what you are looking for

# Report Builder

## Accessing the Report Builder

The Report Builder can be accessed within the reports section of the system.

Two main options we will be focusing on today:

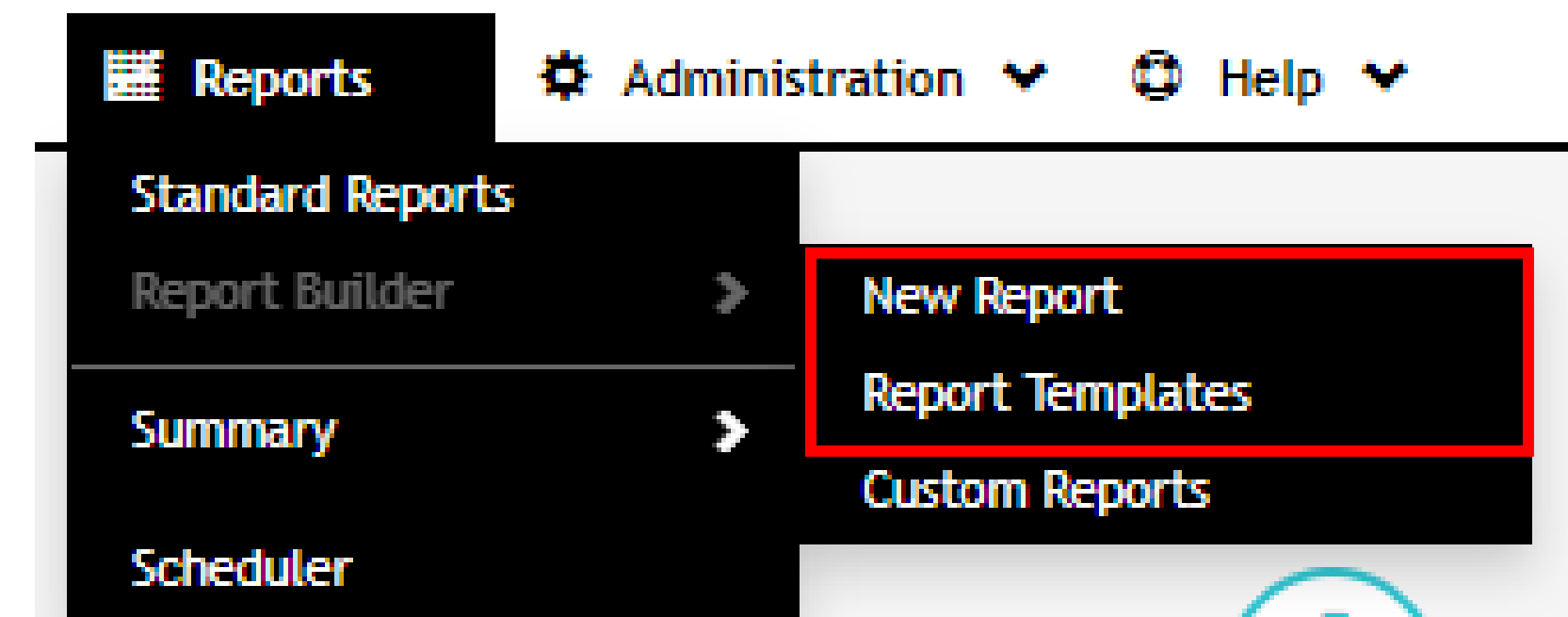
### 1. New Reports

Create and build 100% new reports

### 2. Report Templates

View existing saved reports

Reports > Report Builder



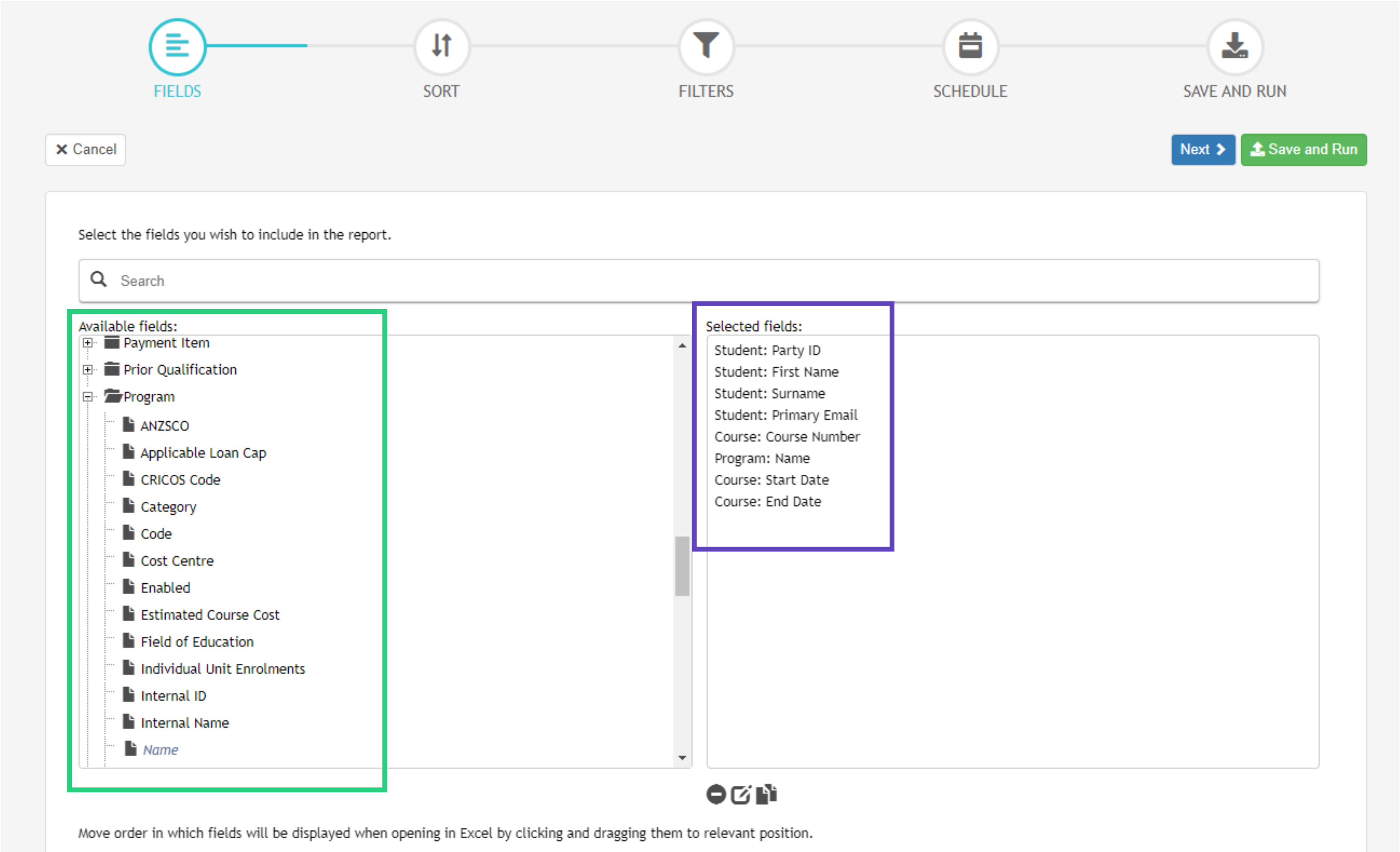
# Report Builder

## New Report - Fields

Folders contain all available fields

Select the fields you would like to see on the output (excel sheet)

Reports > Report builder > New Report





# Report Builder

## New Report - Fields

### Tips

- Sometimes when building the report you may find it helpful to pull some additional fields to help check you're producing everything you need
- You can move the order of the fields by dragging them
- You can come back and edit the list to give you more or less information if required
- It possible to remove selected fields

#### Selected fields:

- Student : Party ID
- Student : First Name
- Student : Surname
- Student : Primary Email
- Course : Course Number
- Program : Name**
- Course : Start Date
- Course : End Date

# Report Builder

## New Report - Sort

For performance reasons, sorting has been disabled for new reports

You can use tools like Excel to post-process your reports

Report Builder

FIELDS

SORT

FILTERS

SCHEDULE

SAVE AND RUN

< Back

✕ Cancel

Next >

Save and Run

For performance reasons, sorting has been disabled for new reports. You can still use tools like Excel to post-process your reports.

< Back

✕ Cancel

Next >

Save and Run

# Report Builder

## New Report - Filter

Filtering is where you choose what data is filtered in or out of report

The **ask** feature lets you use the same filter for different situations

The screenshot shows the 'Filter' step in the Report Builder process. At the top, a progress bar indicates the sequence: FIELDS, SORT, FILTERS (current step), SCHEDULE, and SAVE AND RUN. Below the progress bar, navigation buttons include '< Back', 'Cancel', 'Next >', and 'Save and Run'. The main content area is titled 'Global Date Filter' and includes a 'Filter by:' dropdown, a date range input, and an 'Ask' checkbox. A 'Show more information' link is also present. The 'Other Filters' section explains that records must match a set of criteria. It features a list of 'Available filters' on the left, including Program, ANZSCO, Applicable Loan Cap, CRICOS Code, Category, Code, Cost Centre, Enabled, Estimated Course Cost, Field of Education, Individual Unit Enrolments, Internal ID, Internal Name, Name, Nominal Hours, Number of Academics, Number of Core Units, and Number of Elective Units. On the right, a filter is being configured: 'Program: Name' is selected with an 'equal to' operator and the value 'Provide First Aid'. The 'ask' checkbox is checked. Below this, there are two 'Add Selected' buttons for adding more filters to the 'all' or 'one or more' groups.



# Report Builder

## New Report – Save and Run

Name the report for future use and findability

### Save

Running the template with generate an XLS file for download and review

FIELDS

SORT

FILTERS

SCHEDULE

SAVE AND RUN

< Back

✕ Cancel

This is a stored report template. You will need to save all changes before running the report. Click Run to generate the report.

\*Name:

Students who completed HLTAID011 Provide first aid between two dates

Description:

I am looking for a list of students who completed HLTAID011 Provide first aid between two dates.

Format:

Microsoft Excel

☐ Make Available in Trainer Portal

Export to External File Storage:

None

Save

Run

✔ The report has been generated: [Students\\_who\\_completed\\_HLTAID011\\_Provide\\_first\\_aid\\_between\\_two\\_dates-20230322.xls](#)

If you have selected multiple criteria and a large number of fields to be included in the report, it is recommended that the report be saved before running. In this way, if it takes a few minutes to run the report, you can return to the report (via Report Templates) later and open the results via the Report History list.

< Back

✕ Cancel

G15								
	A	B	C	D	E	F	G	H
1	Student: Party ID	Student: First Name	Student: Surname	Student: I	Course: Course Number	Program: Name	Course: Start Date	Course: End Date
2	00020069	Hillary	Smith	Bridgette.I	CSEREA00028	Provide First Aid	1/4/2023	28/4/2023
3	00020006	Spencer	Smith	gemma.ca	CSEREA00028	Provide First Aid	1/4/2023	28/4/2023
4	00020070	Zander	Smithson	Bridgette.I	CSEREA00028	Provide First Aid	1/4/2023	28/4/2023
5	00020048	Hamish	Shower	Bridgette.I	CSEREA00028	Provide First Aid	1/4/2023	28/4/2023
6	00020019	Sam	Stark	gemma.ca	CSEREA00004	Provide First Aid	2/12/2022	3/12/2022
7	00020009	Sherley	Stark	Bridgette.I	CSEREA00004	Provide First Aid	2/12/2022	3/12/2022
8	00020054	Sarah	Spoons		CSEREA00004	Provide First Aid	2/12/2022	3/12/2022
9	00020047	Kim	Spoons	Bridgette.I	CSEREA00004	Provide First Aid	2/12/2022	3/12/2022
10	00020053	Sussiy	Solo	Bridgette.I	CSEREA00001	Provide First Aid	11/11/2022	12/11/2022
11								
12								
13								
14								

# Report Builder

## Additional filters

After review, you can go back and keep applying additional filters to build the report you desire

### Update 1

Other Filters

The report can be filtered to include only those records that match a certain set of criteria. Select the filters you wish to filter the results by.

Available filters:

Course

Academic

Assessment Method

Assessor

Close Course

Contract

Coordinator

Course Created Date

Course Information

Records included in the results must match all of the filters below.

Program: Name

equal to

Provide first aid

☐ ask

Course: End Date

less than or equal to

1/1/2023

☐ ask

Add Selected

	A	B	C	D	E	F	G	H	I
1	Student: P	Student: First Name	Student: Surname	Student: P	Course: Course Number	Program: Name	Course: Start Date	Course: End Date	
2	00020019	Sam	Stark	gemma.can	CSEREA00004	Provide First Aid	2/12/2022	3/12/2022	
3	00020009	Sherley	Stark	Bridgette.kz	CSEREA00004	Provide First Aid	2/12/2022	3/12/2022	
4	00020054	Sarah	Spoons		CSEREA00004	Provide First Aid	2/12/2022	3/12/2022	
5	00020046	Kim	Spoons	Bridgette.kz	CSEREA00004	Provide First Aid	2/12/2022	3/12/2022	
6	00020053	Sussiy	Solo	Bridgette.kz	CSEREA00001	Provide First Aid	11/11/2022	12/11/2022	
7									

### Update 2

Other Filters

The report can be filtered to include only those records that match a certain set of criteria. Select the filters you wish to filter the results by.

Available filters:

Course Created Date

Course Information

Course Number

Course Status

Course Tags

Course Type

Delivery Mode

Employer

Employer Linked

End Date

Records included in the results must match all of the filters below.

Program: Name

equal to

Provide first aid

☐ ask

Course: End Date

less than or equal to

1/1/2023

☐ ask

Course: End Date

greater than or equal to

1/12/2022

☐ ask

Add Selected

	A	B	C	D	E	F	G	H	
1	Student: Party ID	Student: First Name	Student: Surname	Student: P	Course: Course Number	Program: Name	Course: Start Date	Course: End Date	
2	00020019	Sam	Stark	gemma.can	CSEREA00004	Provide First Aid	2/12/2022	3/12/2022	
3	00020009	Sherley	Stark	Bridgette.kz	CSEREA00004	Provide First Aid	2/12/2022	3/12/2022	
4	00020054	Sarah	Spoons		CSEREA00004	Provide First Aid	2/12/2022	3/12/2022	
5	00020046	Kim	Spoons	Bridgette.kz	CSEREA00004	Provide First Aid	2/12/2022	3/12/2022	
6									
7									

# Report Builder

## New Report - Filter

### Tips:

1. Start with fewer filters. Save and review the data that is exported.
2. Now add more filters to narrow the results as required. Save and export.
3. Check your results and evaluate if you've included a new filter incorrectly.
4. Repeat steps 2 and 3 as required

The screenshot shows the 'Filter' step in the Report Builder process. At the top, a progress bar indicates the sequence: FIELDS, SORT, FILTERS (current step), SCHEDULE, and SAVE AND RUN. Below the progress bar are navigation buttons: '< Back', 'X Cancel', 'Next >', and a green 'Save and Run' button.

The main content area is titled 'Global Date Filter' and includes a 'Filter by:' dropdown, a date range input, and an 'Ask' checkbox. Below this is a 'Show more information' link.

The 'Other Filters' section explains that the report can be filtered to include only those records that match a certain set of criteria. It features a list of 'Available filters' on the left, including Course Number, Course Status, Course Tags, Course Type, Delivery Mode, Employer, Employer Linked, End Date, End Time, Funding Source National, Funding Source State, Location Address, Location Name, and Location Post Code.

The 'Records included in the results must match all of the filters below.' section is highlighted with a red box. It contains three filter criteria:

- Program: Name equal to Provide First Aid ☐ ask
- Course: End Date less than or equal to 1/1/2023 ☐ ask
- Course: End Date greater than or equal to 1/12/2022 ☐ ask

An 'Add Selected' button is located below the filter criteria. The bottom section, 'Records included in the results must match one or more of the filters below.', is currently empty.



# Report Builder

## Accessing Existing Reports

Reports > Report Builder > Report Templates

Reports Templates are saved and can be reused

Can be copied and edited

Custom Reports

+ New

Search










Enter Report Name or Created by Name

Q Search

Search Results

1 - 9 of 9

1 Page

Name	Description	Scheduled	Frequency	Last Run	Created On	Created by	System	
Data Validation - Course		No		14 April 2021 11:54 AM	7 March 2018 4:16 PM	ReadyTech Support	<input type="checkbox"/>	  
Data Validation - Unit Scope		No			8 March 2018 10:21 AM	ReadyTech Support	<input type="checkbox"/>	  
Students who completed HLTAID011 Provide first aid between two dates	I am looking for a list of students who completed HLTAID011 Provide first aid between two dates.	No		22 March 2023 12:13 PM	22 March 2023 12:08 PM	Bridgette Kaminski	<input type="checkbox"/>	  

# Report Builder

## Accessing Existing Reports

Reports > Report Builder > Report Templates > select report

Opening an existing report will allow you to:

- Run the report
- View and re-download past report generated.

Report Builder

New Report

Report Templates

Details

### Report Builder

[Edit](#) [Delete](#)

#### Students who completed HLTAID011 Provide first aid between two dates

I am looking for a list of students who completed HLTAID011 Provide first aid between two dates. <br />

Fields:

Student: Party ID  
Student: First Name  
Student: Surname  
Student: Primary Email  
Course: Course Number  
Program: Name  
Course: Start Date  
Course: End Date

Filters:

Course Scope: Name equal to 'Provide First Aid'  
Course: End Date less than or equal to '1/1/2023'  
Course: End Date greater than or equal to '1/12/2022'

Format: Microsoft Excel [Run Report](#)

#### History

Generated on ▲	Generated by	Download
22 March 2023 12:13 PM	BridgetteOnboardingAdmin	<a href="#">Students_who_completed_HLTAID011_Provide_first_aid_between_two_dates-20230322-3.xls</a>
22 March 2023 12:13 PM	BridgetteOnboardingAdmin	<a href="#">Students_who_completed_HLTAID011_Provide_first_aid_between_two_dates-20230322-2.xls</a>
22 March 2023 12:08 PM	BridgetteOnboardingAdmin	<a href="#">Students_who_completed_HLTAID011_Provide_first_aid_between_two_dates-20230322.xls</a>

# Report Builder

## Copy ID's

You can then use reports to perform actions within the SMS

## Example

Copy party IDs

Past on enrolments page ([Enrolments > Enrolments List](#)) and choose to filter by party ID

This will bring up the full list of students that you found within the report

Make use of the bulk tool to perform actions – e.g. email or apply tags

	A	B	C
1	Student: Party ID	Student: First Name	Student: Surn
2	00020019	Sam	Stark
3	00020009	Sherley	Stark
4	00020054	Sarah	Spoons
5	00020047	Kim	Spoons
6			
7			
8			
9			
10			
11			

Cut

Copy

Paste Options:

### Enrolments

+ New

Search

Student Name, Surname, ID, Known By, USI, Jobseeker ID

Filters

Saved Filters

Party IDs (Multi-Search)

00020019 00020009 00020054 00020047

Search

Save

Clear

Export

#### Search Results

Bulk Actions

1 - 4 of 41 Page

Party ID	Enrolment ID	Name	Course	Course Number	Academic	Location	Start Date	End Date	Target End Date	Enrolment Status
00020047	ENREA00339	Kim Spoons	Provide First Aid (CSERE00004)	CSERE00004	Bridgette Trainer	Launceston Office	2/12/2022		3/12/2022	Completed
00020019	ENREA00336	Sam Stark "Tony"	Provide First Aid (CSERE00004)	CSERE00004	Bridgette Trainer	Launceston Office	2/12/2022		3/12/2022	Completed
00020054	ENREA00338	Sarah Spoons	Provide First Aid (CSERE00004)	CSERE00004	Bridgette Trainer	Launceston Office	2/12/2022		3/12/2022	Completed
00020009	ENREA00337	Sherley Stark "CC"	Provide First Aid (CSERE00004)	CSERE00004	Bridgette Trainer	Launceston Office	2/12/2022		3/12/2022	Completed

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# Lets go do it!

Let's take a look at:

- Creating a report template to answer business question:  
*'I am looking for a list of students who are at risk and doing the Diploma of Business Course'*



# Summary

## What have we done today?

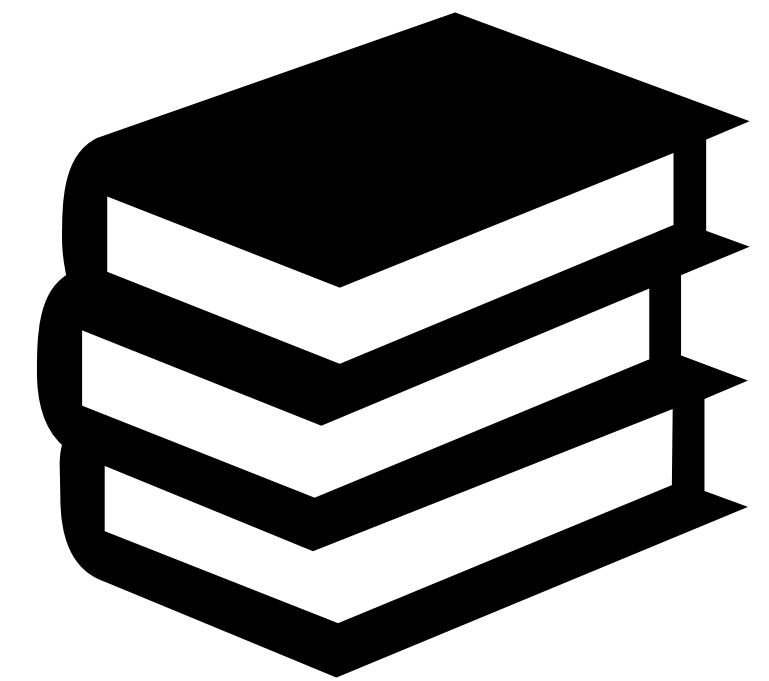
- National Reporting
- Generating national AVETMISS files
- Contacting Support
- Standard reports within the system
- Custom reports



# Action Items

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

- Generate your National AVETMISS files and upload them to AVS for validation
- Take a look at the batch log
- Take a look at the standard list of reports
- Try creating a very simple custom report



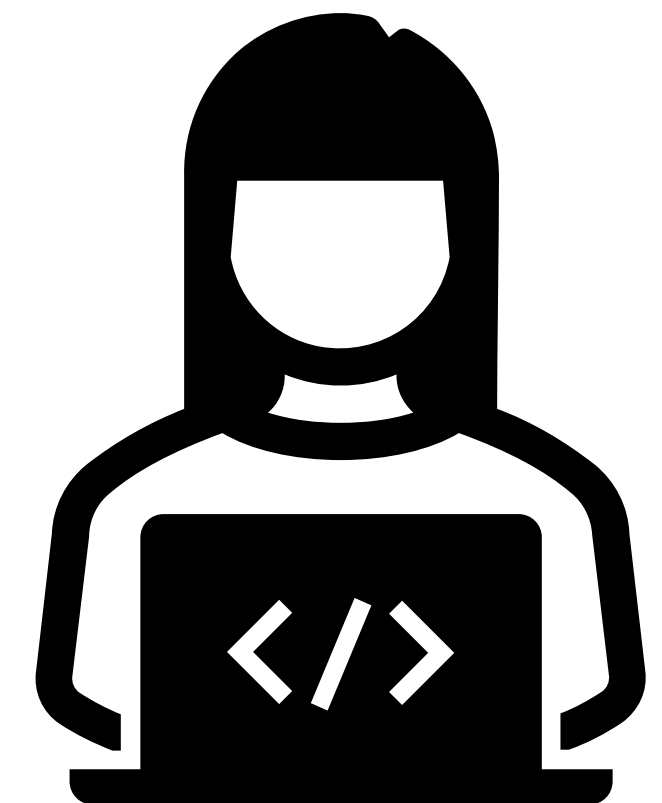


# Enjoyed today's session?

[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:

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