

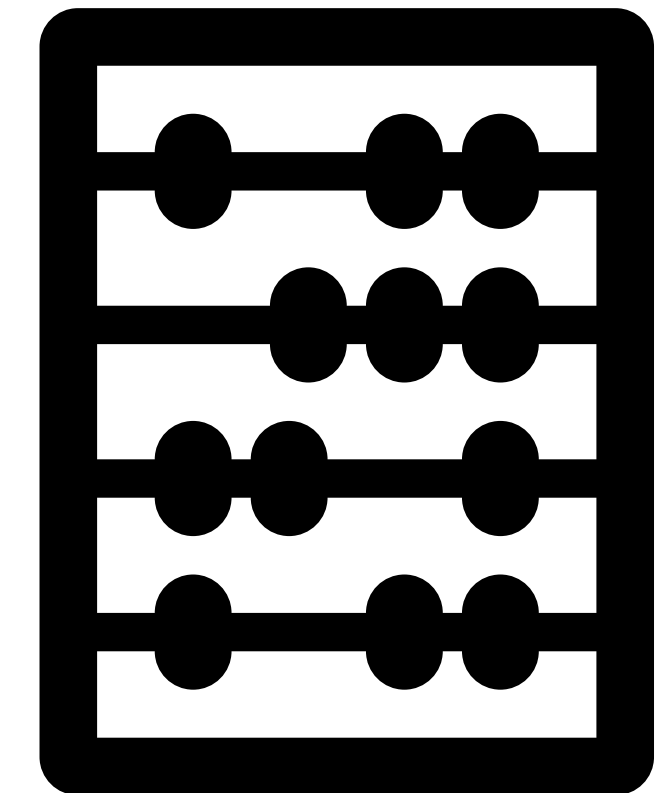
Topic 9 - Additional Features



Additional Features

Communication

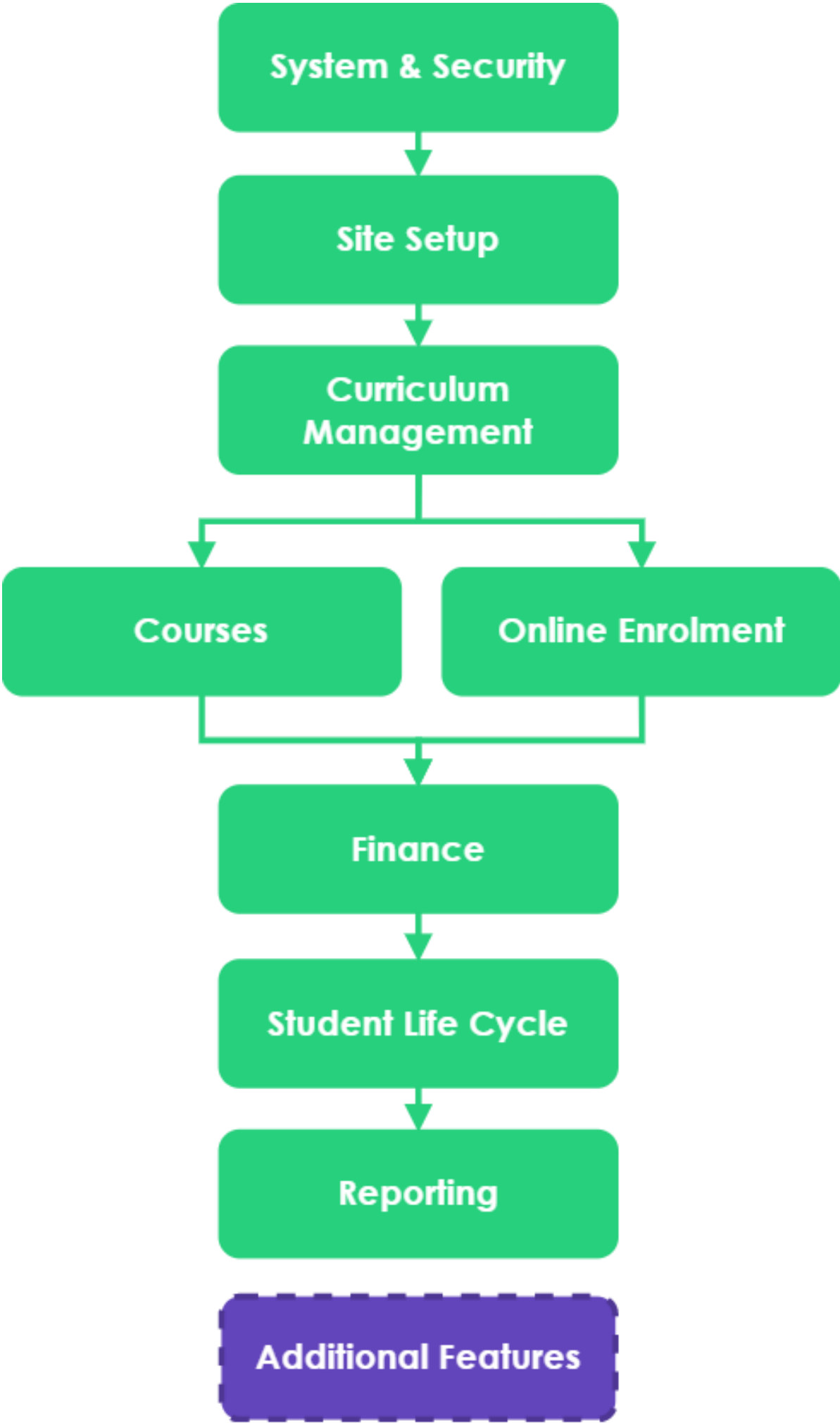
Student Portal and
Trainer View



Topic 9.1 - Communication



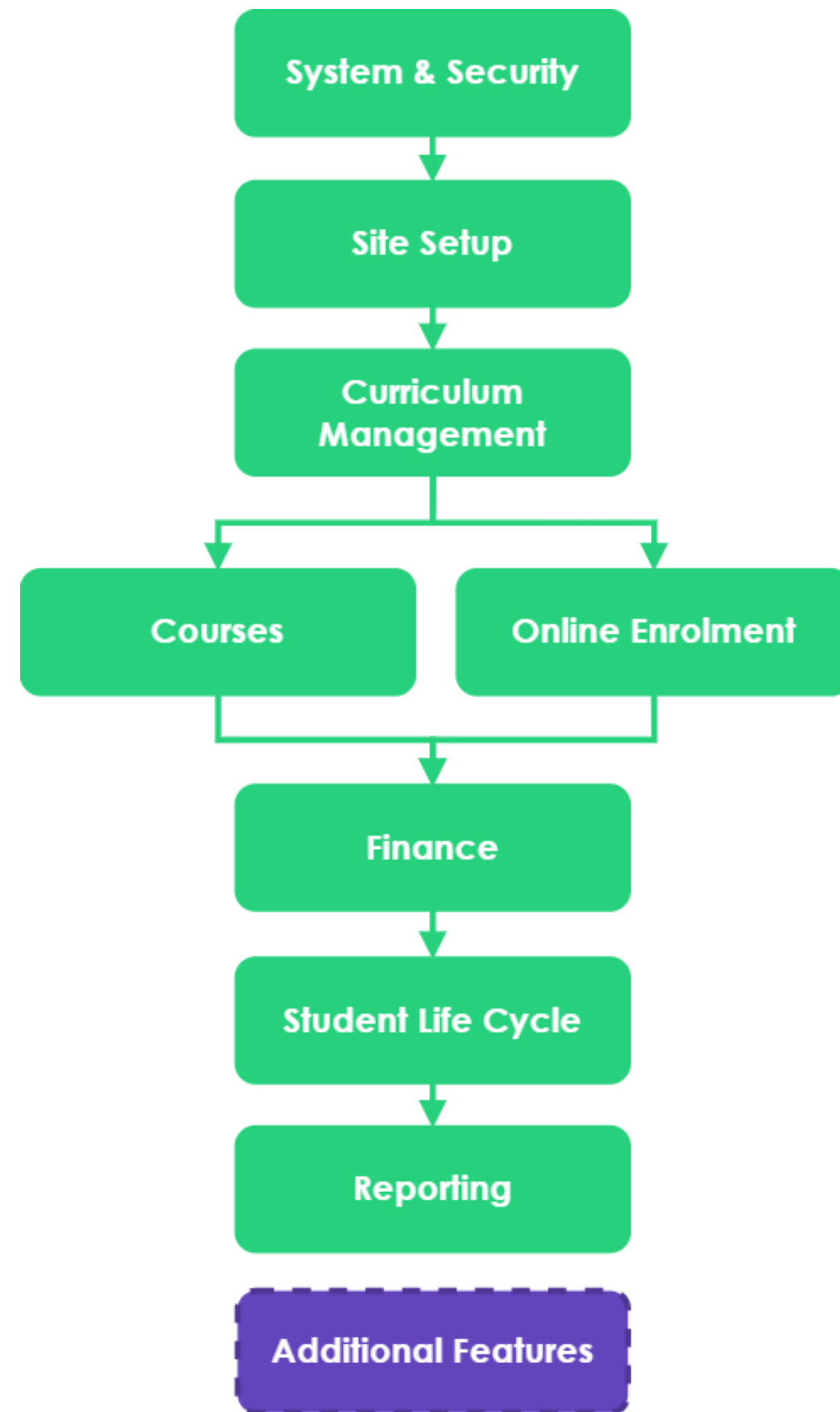
Agenda



Topics Covered

- | | |
|---|----------------------|
| 1 | Notes and Checklists |
| 2 | Uploading Evidence |
| 3 | SMS |
| 4 | Emails |
| 5 | Letters and Forms |
| 6 | Templates |
| 7 | Surveys |

Agenda



Learning Objectives

- 1 Understand how to use and create notes and checklist
- 2 Send SMS's and emails from the system
- 3 Create templates to uses for communication



Notes and Checklists



Notes and Checklist

Notes

Create internal notes against a record

These can be assigned to another user

Can be assigned a date

Community > List All > select party > Notes / Checklists

Person

Profile

Compliance

Career/Employment

Enrolments 0 / 1

List All

Certificates 1

Finance

Balance: \$-1680.00

Schedule

Notes / Checklists 2 +

Email

SMS

Notes Spencer Smith (00020006)

Search

Enter Title

Filters

Saved Filters

Search

Save

Clear

Search Results

1 - 2 of 2

1 Page

Title	Date	Assignee	Priority	Follow Up	Status	Public	Private	Belongs To	Category	Created By
Student Enrolment	23/2/2023	Bridgette Kaminski (00020000)	Normal	23/2/2023	Open				Checklist	Bridgette Kaminski (00020000)
Phone Call	23/2/2023	Theodore Alan (00020028)	Normal	23/2/2023	Open				General	Bridgette Kaminski (00020000)

1 - 2 of 2

1 Page

Notes Spencer Smith (00020006)

Edit

Phone Call General

Spencer called in regards to a outstanding invoice, I was unable to put through to finance.
Please reach out to Spencer in regards to the invoice INVREA00005

Thanks

Details

For: Spencer Smith
Date: 23/2/2023
Category: General
Created By: Bridgette Kaminski
Updated By:

Follow Up

Assigned: Theodore Alan (User)
Archived:
Status: Open
Priority: Normal
Follow-Up Date: 23/2/2023
Event: None

Privacy

Private:
Show in Student Portal:

Notes and Checklist

How to use - Notes

Community > List All > select party > Notes / Checklists

Important fields:

- Template Type – If using a pre-configured template
- Template – The template you would like (optional field for Notes)
- Category – A way to organize your notes

CreateCancel

Note

Template TypeGeneralCategoryGeneralDate23/2/2023

TemplateStart Typing...

*Title

0 characters

Description

A B I U Paragraph System Font 10pt

✂️ 📄 📁 📌 📎 📏 📐 📑 📔 📕 📖 📗 📙 📚 📛 📞 📟 📠 📡 📢 📣 📤 📥 📦 📧 📨 📩 📪 📫 📬 📭 📮 📯 📰 📱 📲 📳 📴 📵 📶 📷 📸 📹 📺 📻 📼 📽 📾 📿 📰 📱 📲 📳 📴 📵 📶 📷 📸 📹 📺 📻 📼 📽 📾 📿

P

Settings

GeneralEventPrivacyAssociations

PriorityLowNormalHighStatusOpenClosedCancelled

AssigneeUser: BridgetteOnboardi... x ⓘFollow-Up Date23/2/2023 📅

Archived❑Specific Time❑

> readytech

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Notes and Checklist

Checklists

Create an item list against a record

List can have multiple items assigned to different users

Unlike Notes, Checklist require a template to be created before they can be used

You can create these templates in the SMS

Notes Spencer Smith (00020006)

Edit

Student Enrolment Checklist

Tasks

Complete	Order	Name	Description	Priority	Assignee	Follow-Up Date	Private
<input checked="" type="checkbox"/>	1	Enrolment Form	Student completed an enrolment form.	Normal	Bridgette Kaminski (User)		<input type="checkbox"/>
<input checked="" type="checkbox"/>	2	Student Policy	Student has signed the student policy.	Normal	Gemma Cameron (User)	23/2/2023	<input type="checkbox"/>
<input type="checkbox"/>	3	Course Fees	Complete responsibility for payment of fees.	Normal	Theodore Alan (User)	2/3/2023	<input type="checkbox"/>
<input type="checkbox"/>	4	Enter Student	Student has been entered into the system.	Normal	Theodore Alan (User)		<input type="checkbox"/>
<input type="checkbox"/>	5	Training Contract	The Training Contract has been received from the Apprentice Centre	Normal	Bridgette Kaminski (User)		<input type="checkbox"/>
<input type="checkbox"/>	6	Training Plan	The Training Plan has filled out and sent to the student.	Normal	Bridgette Kaminski (User)		<input type="checkbox"/>

Details

For: Spencer Smith

Date: 23/2/2023

Category: Checklist

Checklist: Student Enrolment

Created By: Bridgette Kaminski

Updated By: Bridgette Kaminski

Follow Up

Assigned: Bridgette Kaminski (User)

Archived:☐

Status: Open

Priority: Normal

Follow-Up Date: 23/2/2023

Event: None

Privacy

Private:☐

Show in Student Portal:☐

Notes and Checklist

How to use - Checklists

Community > List All > select party > Notes / Checklists

Important fields:

- Template Type – Checklist
- Category – Checklist
- Template – The template you would like

To assign individual items:

- Save the new list
- Edit – assign items to individual people with follow up dates

Create Note

Template Type: Checklist | Category: Checklist | Date: 23/2/2023

Template: No results found | Checklist: Student Enrolment

*Title: Student Enrolment (0 characters)

Complete	Order	Name	Description	Notes	Priority
<input type="checkbox"/>	1	Enrolment Form	Student completed an enrolment form.		Normal

Note Edit Spencer Smith (00020006)

Update | Cancel

Template Type: Checklist | Category: Checklist | Date: 23/2/2023

Template: Start Typing... | Checklist: Student Enrolment | History: + Bridgette Kaminski, Bridgette Kaminski

*Title: Student Enrolment (17 characters)

Complete	Order	Name	Description	Priority	Follow-Up Date	Private
<input checked="" type="checkbox"/>	1	Enrolment Form	Student completed an enrolment form.	Normal		<input type="checkbox"/>
<input checked="" type="checkbox"/>	2	Student Policy	Student has signed the student policy.	Normal	23/2/2023	<input type="checkbox"/>
<input type="checkbox"/>	3	Course Fees	Complete responsibility for payment of fees.	Normal	23/2/2023	<input type="checkbox"/>
<input type="checkbox"/>	4	Enter Student	Student has been entered into the system.	Normal		<input type="checkbox"/>

User selection dropdown:

- User: Bridgette Kaminski (00020000)
- User: Bridgette Trainer (00020017)
- User: Gemma Cameron (00020018)
- User: Tom Thomas (00020022)
- User: Tyler Trent (00020020)

Notes and Checklist

View Tasks

You can view notes/checklists assigned to you in two places

- 1. The dashboard - task's widget
- 2. Home > Task List
 - a) You can filter this list

Tasks

Follow-Up Date

23/2/2023

23/2/2023

Filters

Saved Filters

Assignee

User: Bridgette Kaminski (00020000)

Status

Open

Search

Save

Clear

Today

Week

Future

Export

Bulk Actions

1 - 3 of 3

1 Page

Date	Priority	Type	Category	Instance	Name	Assignee	Follow Up	Status	Stage	Private
23/2/2023	Normal	Party	General	Smitherson, Sam	Review Enrolment	BridgetteOnboardingAdmin	23/2/2023	Open		<input type="checkbox"/>
23/2/2023	Normal	Party	Checklist	Smitherson, Sam	Student Enrolment	BridgetteOnboardingAdmin	23/2/2023	Open		<input type="checkbox"/>
23/2/2023	Normal	Party	Checklist	Smith, Spencer	Student Enrolment	BridgetteOnboardingAdmin	23/2/2023	Open		<input type="checkbox"/>

1 - 3 of 3

1 Page

23/2/2023

Normal

Party

General

Smitherson, Sam

Review Enrolment

BridgetteOnboardingAdmin

23/2/2023

Open

☐

☒

23/2/2023

Normal

Party

Checklist

Smitherson, Sam

Student Enrolment

BridgetteOnboardingAdmin

23/2/2023

Open

☐

☒

Checklist

Tasks

Complete	Order	Name	Description	Priority	Assignee	Follow-Up Date	Private
<input checked="" type="checkbox"/>	1	Enrolment Form	Student completed an enrolment form.	Normal	Gemma Cameron (User)		<input type="checkbox"/>
<input type="checkbox"/>	2	Student Policy	Student has signed the student policy.	Normal	Bridgette Kaminski (User)	23/2/2023	<input type="checkbox"/>
<input type="checkbox"/>	3	Course Fees	Complete responsibility for payment of fees.	Normal			<input type="checkbox"/>
<input type="checkbox"/>	4	Enter Student	Student has been entered into the system.	Normal			<input type="checkbox"/>
<input type="checkbox"/>	5	Training Contract	The Training Contract has been received from the Apprentice Centre	Normal			<input type="checkbox"/>
<input type="checkbox"/>	6	Training Plan	The Training Plan has filled out and sent to the student.	Normal			<input type="checkbox"/>

Notes and Checklist

Notes and checklists can be used against a number of entities in the system:

- Party records
Community > List All > select party > Notes / Checklists
- Courses
Courses > select course > Notes / Checklists
- Programs
Administration > Curriculum > Program > select program > Notes / Checklists
- Units
Administration > Curriculum > Units > select unit > Notes / Checklists
- Companies
Community > Company > List All > select company > Notes / Checklists
- Course application
Courses > Application > select application > Notes





Uploading Evidence



Uploading Evidence

Documents be stored against different entities in the SMS

e.g. A student

Community > List All > select student > Documents > All Documents

There are two ways to upload documents:

- + new: Individual documents
- Bulk Upload: Multiple documents at once

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Search...

Q

Gemma Cameron
ReadyTech Education

Home

Community

Enrolments

Courses

Scheduling

Services

Sales

Communications

Reports

Administration

Help

Person

Profile

Compliance

Career/Employment

Enrolments 0 / 1

Certificates 1

Finance

Balance: \$-1680.00

Schedule

Notes / Checklists 0 +

Email

SMS

Documents 10

All Documents

Published Documents

Spencer Smith 00020006

Australia

22 September 1997 (25)

At Risk View all

Profile

TitleDrID00020006

First Name(s)SpencerUSI

SurnameSmith

Middle Name(s)Josh

Known ByJJ

GenderMale

Email(Personal)gemma.cameron+SpencerSmith@readytech.io

Phone(PHONE) (Home)0455968635

AddressHome: 9 ELIZABETH STREET, MELTON SOUTH, VIC 3338, Australia

Activity Feed

Gemma Cameron course_application::kanban_update course_application Advanced Diploma of Building Design (2023 AdDip Building Design) 21 Feb 2023 9:50 AM

Gemma Cameron course_application::kanban_update course_application Advanced Diploma of Building Design (2023 AdDip Building Design) 21 Feb 2023 9:49 AM

Bridgette Kaminski created an

Identification

No identifications have been recorded

Login Credentials

Student Access

Login

Last Login

Lock Account

gemma.cameron+spencersmith@readytech.io

22 February 2023 8:42 AM

Admin

Documents Spencer Smith (00020006)

+ New

↑ Bulk Upload

Document Name

Filters

Saved Filters

Search

Save

Clear

Files

Bulk Actions

1 - 11 of 11

1 Page

Name	Description	Folder	Category	Type	Portal	Belongs To	Created	
Request to Reset Password		General	General		<input type="checkbox"/>		7 February 2023 12:25 PM	
Quote: Quote 2023-02-07		General	General		<input type="checkbox"/>		7 February 2023 2:59 PM	
Invoice :INVREA00001		Invoice	Invoice		<input type="checkbox"/>		8 February 2023 12:30 PM	
Invoice :INVREA00002		Invoice	Invoice		<input type="checkbox"/>		8 February 2023 1:24 PM	

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Uploading Evidence


Bulk Upload 00020006 - Spencer Smith

Upload Cancel

Bulk Upload

Drag & Drop files here

Browse Files




*Name:

bee.jpg

Portal:

☐



*Category:


General

Type:

Evidence

Folder:

Use same as category




*Name:

Class room.jpg

Portal:

☐



*Category:


Compliance

Type:

Evidence

Web Published:

☐



Party > Smith, Spencer > Document New

Upload Cancel

Document

*Name:

Work

Description:

A

B

I

U

Paragraph

System Font

10pt

P

*New File:

Choose file bee.jpg

or URL:

*Category:

Compliance


Folder:

Use same as category

Type:


Evidence

Order:




Portal:

☒



Private:

☒




Viewable By:

Group: Administration


Web Published:

☐



Full URL:

<https://onboarding.readystudent.com.au>



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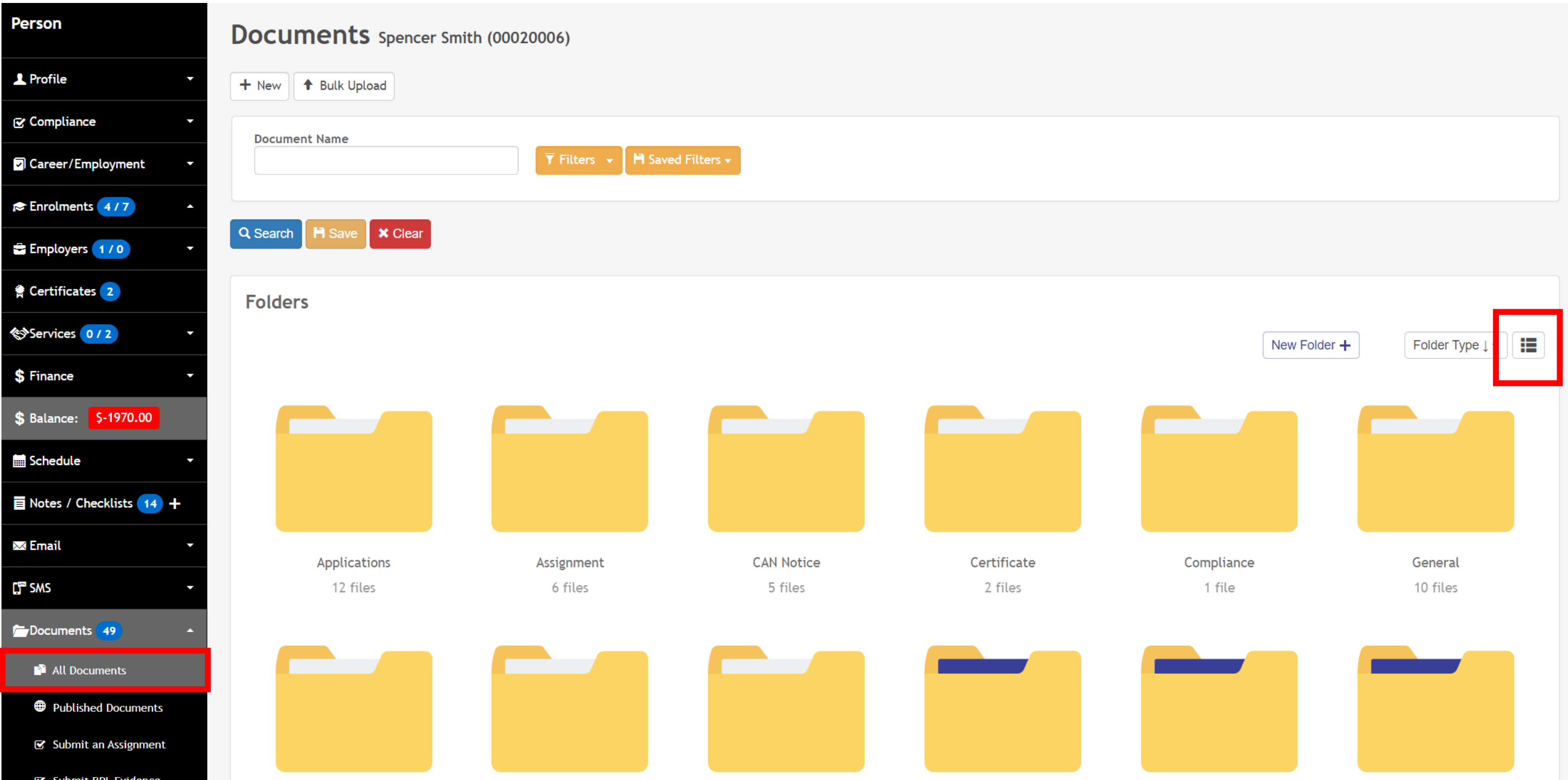
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Uploading Evidence

Document View

Documents can also be viewed in document view by swapping using the icon to the right of the screen



Lets go do it!

Let's take a look at:

- Creating a Note / Checklist for a party
- Upload Evidence (a document) for a party





SMS and Emails



SMS

Integration - MessageMedia

External messaging requires an MessageMedia integration

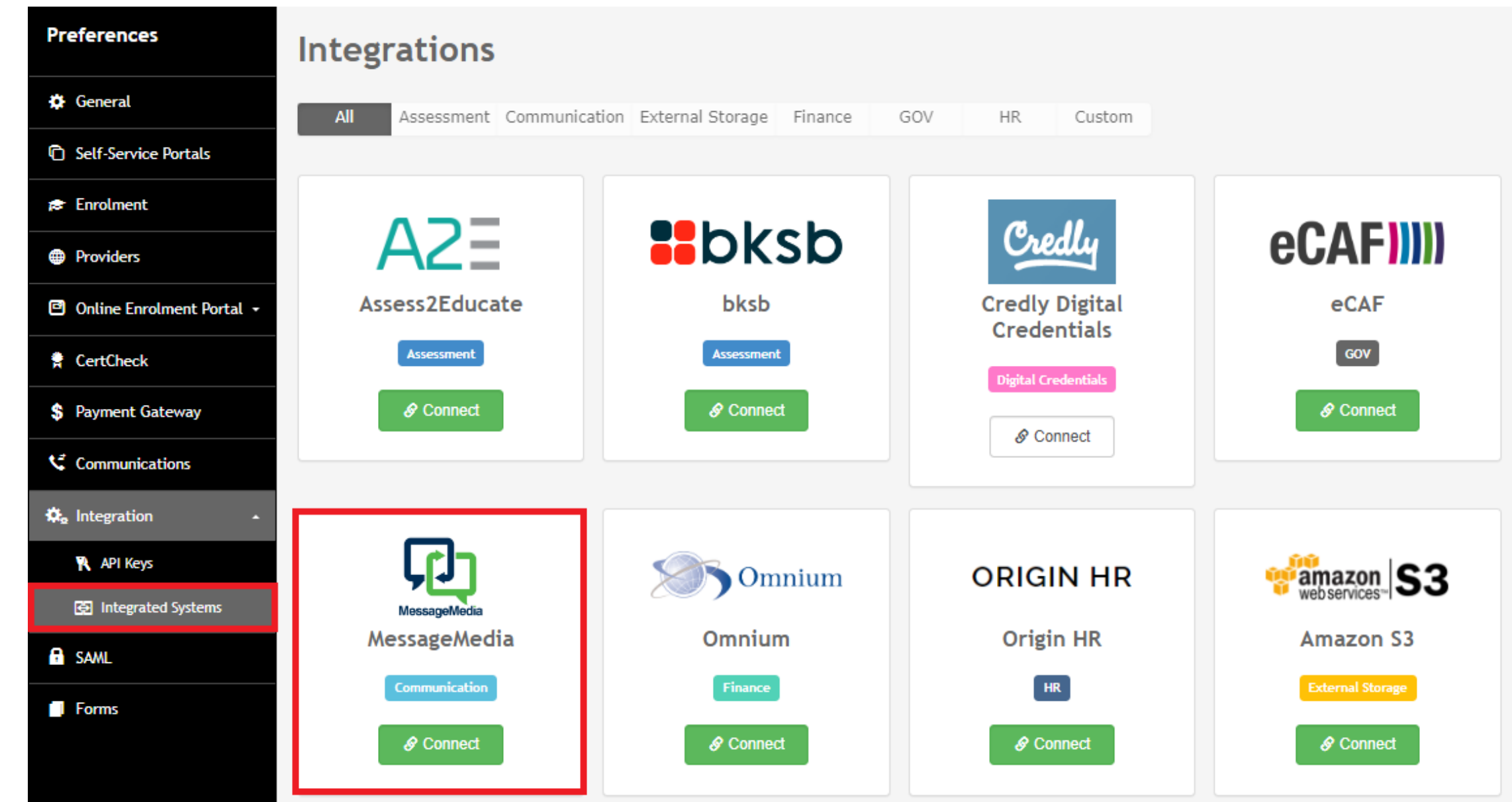
Step 1:

- Set up an account (note: associated fees and charges) and choose a plan
- Please visit [Message Media site](#) for more details

Step 2: Integrate with student management system

- Details on configuration can be [viewed here](#)

Administration > Configuration > Preferences > Integration Systems

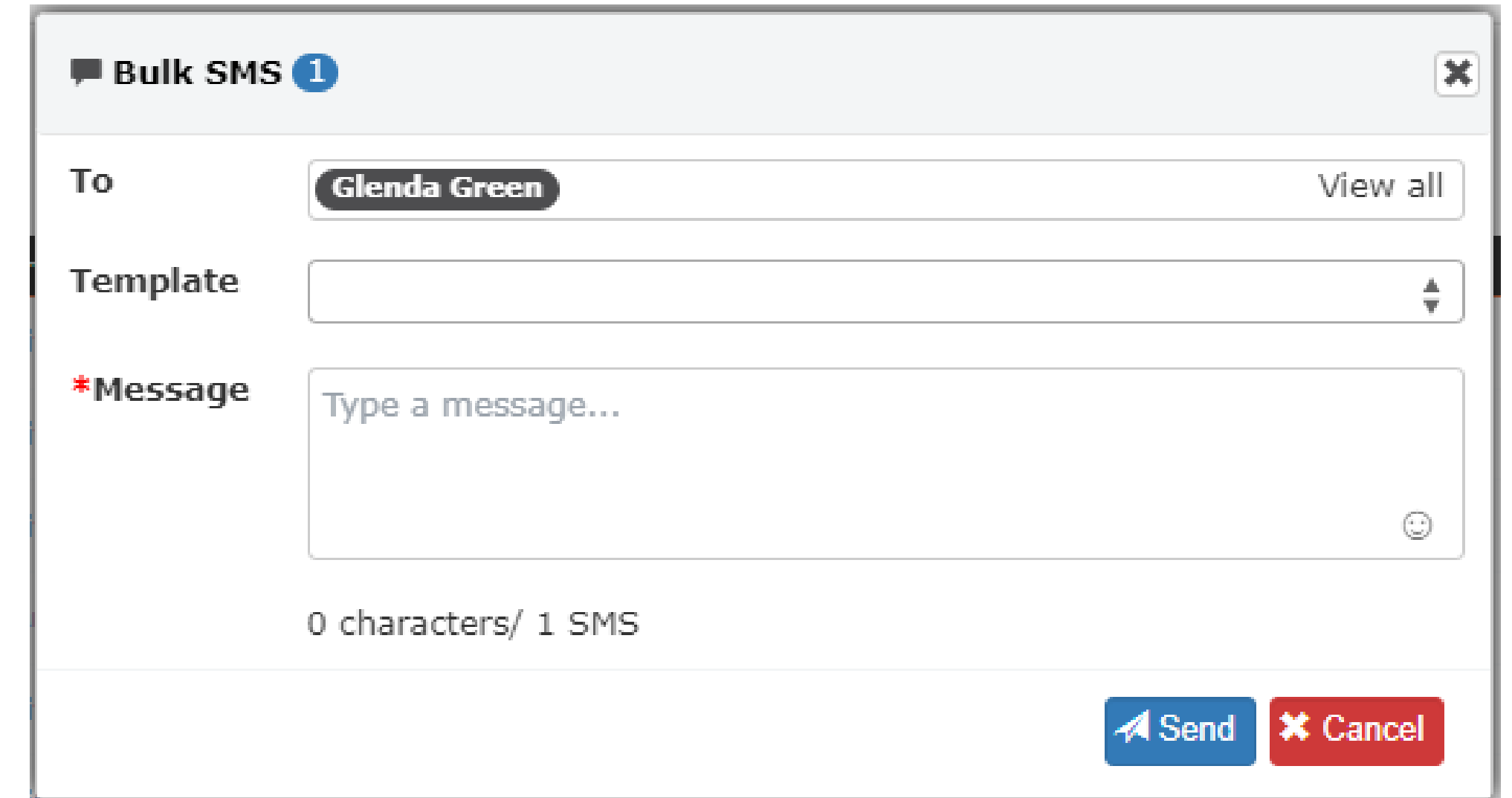


SMS

Sending

Options to send messages from within the system:

- To an individual student
Community > List All > select party > SMS > Compose
- To multiple students within a course
Course > Course List > select course > SMS > Compose
- Within a list view eg. Enrolment List
Enrolment > Enrolment List > Bulk Actions > select students > Bulk Actions > SMS
- For an Event e.g. Event for Course
Course > Course List > Select Course > Timetable > All Events > select event > : > SMS

A screenshot of a web application window titled "Bulk SMS 1". The window contains a form with three main sections: "To", "Template", and "Message". The "To" section has a dropdown menu showing "Glenda Green" and a "View all" link. The "Template" section has a dropdown menu. The "Message" section has a text area with the placeholder "Type a message..." and a character count "0 characters/ 1 SMS". At the bottom right, there are two buttons: "Send" (blue) and "Cancel" (red).

NOTE!

- Will only send if student has phone number listed (you will not receive a notification of an unsent message)
- If sending from a list (eg. enrolments list) and a student has multiple enrolments it will only send to each student once

Email

Configuring Your Email Settings

Note!

To use emails within the student management system, you will need to have your email settings configured

This was something we covered during Session 2

[Process: Configuring Your Email Settings](#)



Sending

There are a few ways you can send emails within the system.

- To an individual students
Community > List All > select party > Email > Compose
- To multiple students within a course
Course > Course List > select course > Email > Compose
- Within a list view eg. Enrolment List
Enrolment > Enrolment list > Bulk Actions > select students > Bulk Actions > Email
- For an Event e.g. Event for course
Course > Course List > Select Course > Timetable > All Events > select event > : > Email

[illegible]

Attaching PDFs

These can be external or from within the Documents list

Insert files

Upload

Documents

URL

1 - 27 of 27

1 Page

Name	Description	Created	Category
<input type="checkbox"/> Invoice Email - Initial		29 March 2023 9:08 AM	Student Communications
<input type="checkbox"/> Application Withdrawn		27 March 2023 11:12 AM	Applications
<input type="checkbox"/> Confirmation of Enrolment		27 March 2023 11:11 AM	Applications
<input type="checkbox"/> Application Unsuccessful		27 March 2023 10:59 AM	Applications
<input type="checkbox"/> Payment on :INVREA00017		21 March 2023 2:14 PM	Payment
<input type="checkbox"/> Invoice :INVREA00022		21 March 2023 2:13 PM	Invoice

↑ Upload

✕ Cancel



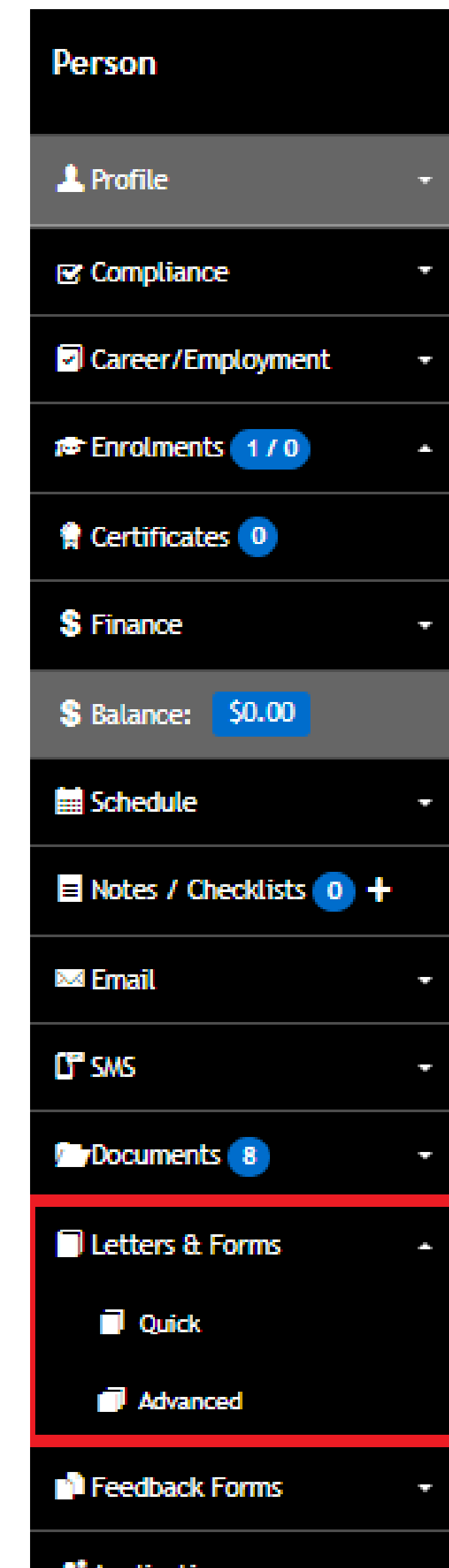
Letters and Forms

Letters and Forms

Letters and Forms let you communicate from different entity levels
e.g. Student, Course

Community > List All > search and select party > Letters and Forms

Course > Course List > search and select course > Letters and Forms

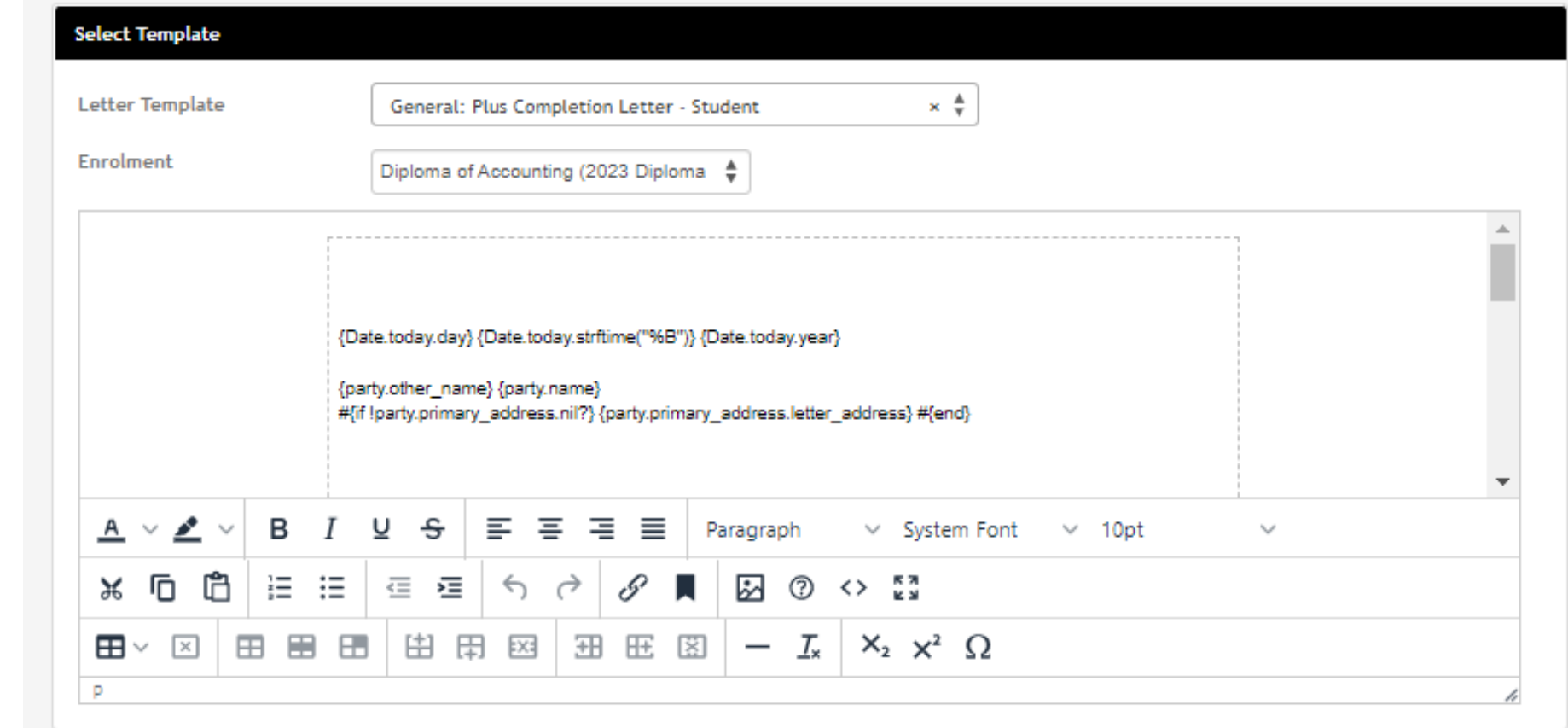


Letters and Forms

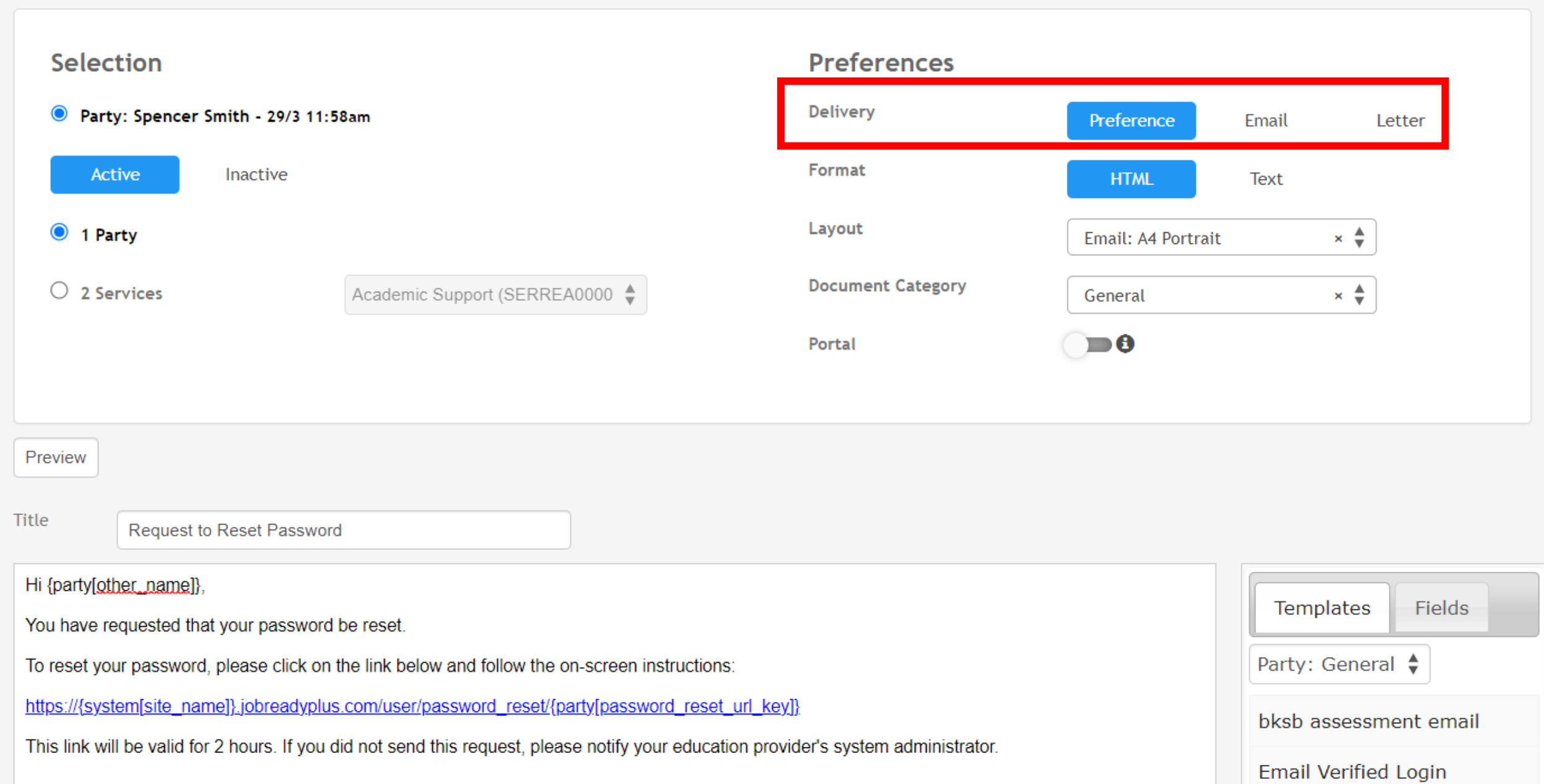
Two options:

- **Quick**
Good for creating PDF documents against a party/enrolment/course
 - **Advanced**
Allows you to select a target
 - Individual – can select that party
 - Course – can send to all enrolments
- Delivery
- Letter = pdf that can be download (found under Documents)
 - Email = stores as email

Letters & Forms - Quick Spencer Smith (00020006)



Letters & Forms - Advanced Spencer Smith (00020006)



Lets go do it!

Let's take a look at:

- Send SMS in bulk
- Sending a Course-wide email
- Sending an Email for an event
- Create a Letter/Form for a student





Templates



Templates

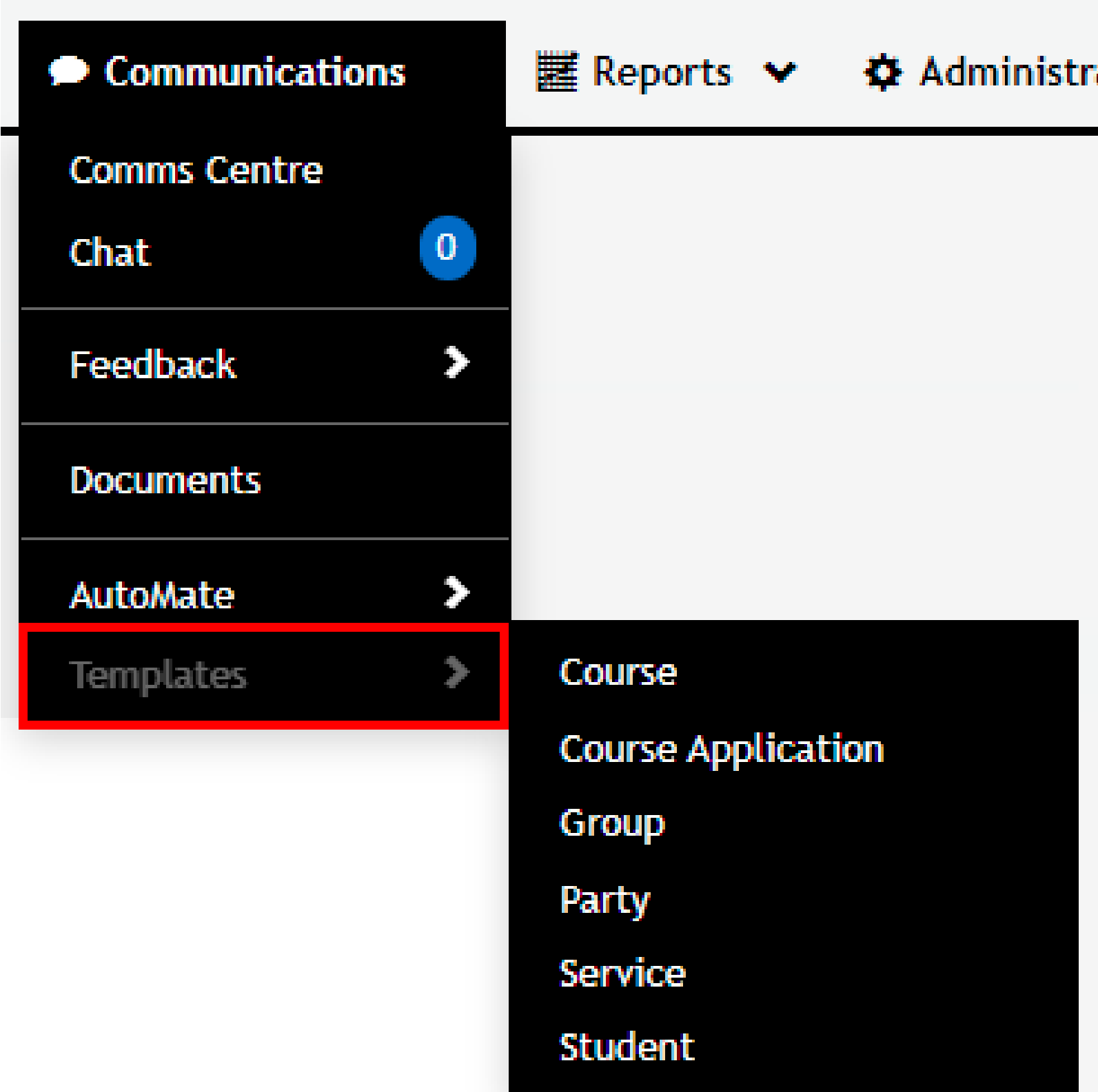
Accessing Templates

Communications > Templates

There is a list of entities for which templates can be created

Consider setting up, particularly:

- Course
- Party
- Course Applications (see Session 5)



Notes

Note templates can be given basic info such as a title, category, priority, follow up days and content

Communications > Template > Student > Notes
> Template

Entity

List

Notes

Categories

Templates

Checklist

Letters & Forms

Categories

Templates

Automation

Automations

Conditions

Other

Fields

Entity > Student > Note Template > Create

CreateCancel

*Title

Phone call

*Category

General

*Priority

☒ Normal ☐ Low ☐ High

Days to follow up

3

Days

Status

☒ Enabled ☐ Disabled

Content

Name:

Number:

Details from the call:

Additional follow-up:

A

B

I

U

S

≡

≡

≡

≡

Paragraph

System Font

↶

↷

↺

↻

↵

↶

↷

↺

↻

For each note you can set a category from an editable list

Communications > Template > Student > Notes
> Categories

Entity

List

Notes

Categories

Templates

Checklist

Letters & Forms

Categories

Templates

Automation

Automations

Conditions

Other

Fields

Entity > Student > File Note Category > New

* Name

Phone call

Status

☒ Enabled ☐ Disabled

Description

After a student has called

Public/Portals

☐

Colour

#f23699

Stages

Create

Cancel

Checklist

Checklists require a pre-created template

Communications > Templates > Student > Notes > Checklists

There are two key parts to creating a checklist:

1. Input a title and description
2. List all the items for the checklist itself

Entity > Student > Check List Template > Create

List

Notes

Categories

Templates

Checklist

Letters & Forms

Categories

Templates

Automation

Automations

Conditions

Other

Fields

Create Cancel

*Title

Status ☒ Enabled ☐ Disabled

Content

This checklist ensures all required student information is collected for enrolment.

A [font color icon] B I U [link icon]

[bulleted list icon] [numbered list icon] [indent left icon] [indent right icon] Paragraph System Font 10pt

[undo icon] [redo icon] [link icon] [unlink icon] [image icon] [help icon] [source code icon] [full screen icon]

[table icon] [table border icon] [table border none icon] [table border collapse icon] [table border expand icon] [table border shrink icon] [table border reset icon] - I_x ×₂ ×² Ω

P

Tasks +

Order	Name	Description	Priority	Assignee	Private	Status
1	Enrolment Form	Student completed an Enrolment F	Normal ▾	Start Typing... ▾	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Student Policy / Handbook	Student has been issued with the S	Normal ▾	Start Typing... ▾	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Student Portal access	Access to the Student portal has be	Normal ▾	Start Typing... ▾	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Templates

SMS

Communications > Templates > Party > SMS > Templates

SMS templates are plain text supported, you cannot use template merge fields or hyperlinks

Entity

List

Notes

Categories

Templates

Checklist

Letters & Forms

Categories

Templates

SMS

Categories

Templates

Automation

SMS Template > New

Name

Class start

Description

1st week reminder

Message

Remember classes start Monday!
Don't forget to log in to the student portal to view your timetable.

Enabled

☒

Create

Cancel

Templates

Email/Letter

Communications > Templates > Student > Letters and Forms > Templates

Two parts:

1. Details

Enter key information

- Title
- Subject
- Status
- Format - As this is an email, you will need to select HTML
- Layout - As this is an email, you will need to select Email: A4 Portrait

The screenshot shows the 'New Letters & Forms Template' form. The left sidebar has a navigation menu with 'Templates' highlighted under the 'Letters & Forms' section. The main form area is titled 'New Letters & Forms Template' and contains the following fields:

- Name:** Application approved
- From:** (dropdown menu)
- Subject:** Congratulations! You application has been approved
- Status:** ☒ Enabled ☐ Disabled
- Format:** ☒ HTML ☐ Text
- Type:** (dropdown menu)
- *Layout:** Email: A4 Portrait
- Category:** General
- Document Category:** Applications
- Portal:** ☐ (info icon)
- Authorised User Group:** (dropdown menu) (info icon)

The 'Details' tab is active, and the 'Content' tab is visible at the bottom.

Templates

Email/Letter

2. Content

LHS – design and format contents

RHS – Add required template fields

Content

Hi {party[other_name]},

This is a courtesy email to establish contact prior to your learning commencing.

Please let us know if you have any questions – Welcome to your new course!

Regards

{images[email_footer]}

Party

abn

address_list

anzsic_description

contact_email

contact_firstname

contact_method

contact_name

contact_phone

contact_surname

contact_title


Templates

Template Fields

Template Field Mappings Index



Template Field Mappings - Party Records

 **Ash Wayling**
Modified on: Wed, 1 Mar, 2023 at 10:53 AM

The following is a list of available Template Fields for Party Record information.

NAME OF FIELD	RELEVANT ENTITY	SYSTEM LOCATION / NOTES
abn	Party ABN	Party profile > Details <i>Note: shows ABN listed on details page and not what is displayed in international settings</i>
address_list	Full Address list	Party profile > Details page > Address <i>Note: only includes street number, Street name and suburb</i>
anzsic_description		
contact_email	Party Primary Email	Party profile > Details
contact_firstname	Party First name	Party profile > Details
contact_method	Preffered Contact Method	Party profile > Details page > Admin

Lets go do it!

Let's take a look at:

- Create templates
 - Notes
 - Checklist
 - Email



 **readytech**



Surveys



Surveys

Uses

Allow you to track information anonymously

e.g.

- Workplace visits
- Course evaluations

Great for:

- Student satisfaction
- Staff satisfaction
- General anonymous feedback



Course Evaluation

1

2

Course Evaluation Form

Please complete the following form to give us feedback on your course.

This course was relevant to my needs

1

Neutral

5

3

⊖

The materials provided were helpful

1

Neutral

5

5

⊖

The length of training was sufficient

1

Neutral

5

4

⊖

Content was well organised

1

Neutral

5

3

⊖

Instructions were clear and understandable

1

Neutral

5


5

⊖

Create the Survey


1. Build the form settings

Administration > Forms > Survey Forms




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Q



1



Gemma Cameron
ReadyTech Education

Home

Community

Enrolments

Courses

Scheduling

Services

Sales

Communications

Reports

Administration

Help

New Survey

Save

Cancel

Details

*Name:

Course Evaluation

Target:

General

Type:

Student Satisfaction Survey

*Form:

Course Evaluation

URL:

https://onboarding.jobreadyplus.com/rea/survey/90925

Start Date:

1/3/2023

End Date:

1/4/2023

Allow Saving:

☒

Save Expires After:

hour(s)

Status:

Open

Disabled

Closed

Surveys

Create the Survey

2. Build the form content

Administration > Forms > Survey Forms

Course Evaluation

Survey Form

Edit

Duplicate

Form Builder

Details

Name:

Course Evaluation

Location:

Melbourne CBD Office

Branding:

Form Branding

Enabled:

☒

Snippets

Fields

Styles

Tools

Basic

Short Answer

Paragraph

Radio buttons

Checkboxes

Dropdown

Smart Question

Date

File

Digital Signature

Tags

Star Rating

Slider

Properties

Reference Data

Country

Gender

Language

Location (All)



Course Evaluation

[Click to Add Form Header]

1 2 Success

Course Evaluation Form

Please complete the following form to give us feedback on your course.

This course was relevant to my needs

Min

1

Step Size

1

Max

5

Mid Text

Neutral

Surveys

Create the Survey

3. Set up the survey

Communications > Feedback
> Surveys

readytech

Search...

Gemma Cameron

ReadyTech Education

Home

Community

Enrolments

Courses

Scheduling

Services

Sales

Communications

Reports

Administration

Help

Surveys

+ New

Name

Q Search

✕ Clear

Course Evaluation

Created: 2/3/2023 | Modified: 2/3/2023

2

Responses

7

Questions

2

Pages

OPEN

Course Evaluation

https://onboarding.jobreadyplus.com/rea/survey/90925

SUMMARY

RESPONSES

Details

Name:

Course Evaluation

Target:

General

Type:

Student Satisfaction Survey

Form:

Course Evaluation

Branding:

Form Branding

URL:

https://onboarding.jobreadyplus.com/rea/survey/90925

Start Date:

1/3/2023

End Date:

1/4/2023

Allow Saving:

☒

Save Expires After:

Never

2

RESPONSES

7

QUESTIONS

Open

STATUS

2

PAGES

Surveys

Create the Survey

4. Create email template

Communications > Feedback
> Surveys

e.g. for all students in a
Course

Communications > Templates
> Course > add new

Course Evaluation

<https://onboarding.jobreadyplus.com/rea/survey/90925>

SUMMARY RESPONSES

Details

Name:	Course Evaluation	Start Date:	1/3/2023
Target:	General	End Date:	1/4/2023
Type:	Student Satisfaction Survey	Allow Saving:	<input checked="" type="checkbox"/>
Form:	Course Evaluation	Save Expires After:	Never
Branding:	Form Branding		
URL:	https://onboarding.jobreadyplus.com/rea/survey/90925		

2
RESPONSES

Open
STATUS

7
QUESTIONS

2
PAGES

Details

*Name

From

Subject

Status ☒ Enabled ☐ Disabled

Format ☒ HTML ☐ Text

Type

*Layout

Category

Document Category

Portal ☐

Authorised User Group

Content

Dear {party{other_name}}.

Thank you for taking part in {course[name]}. Please fill in the following survey to provide anonymous feedback on the Course.

<https://onboarding.jobreadyplus.com/rea/survey/90925>

[assessment_method](#)
[assessor_email](#)
[assessor_name](#)

Surveys

Create the Survey

5. Distribute survey link

Send through

Courses > Course List > select
course > Email > Compose

Course Email > Bulk Email

Layout: Clear: A4 Portrait

Document Category: Student Communications

New file: Choose file No file chosen

or url:

Choose file from document

Template: General: Course Feedback Form Distributions...

Email

*Subject: Course Feedback

Dear {party(other_name)},

Thank you for taking part in {course(name)}. Please fill in the following survey to provide anonymous feedback on the Course.

<https://onboarding.jobreadyplus.com/rea/survey/90925>

Rich text editor toolbar: Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Link, Unlink, Image, Table, Text Color, Background Color, Font Size, Paragraph, System Font, 10pt.

Email Details

to: gemma.cameron+samstark@readytech.io

Dear Sam,

Thank you for taking part in Certificate III in Business (2023 Cert III Business). Please fill in the following survey to provide anonymous feedback on the Course.

<https://onboarding.jobreadyplus.com/rea/survey/90925>

Surveys

View Results

Communications > Feedback > Surveys

Course Evaluation

https://onboarding.jobreadyplus.com/rea/survey/90925

SUMMARY

RESPONSES

Details

Name:

Course Evaluation

Start Date:

1/3/2023

Target:

General

End Date:

1/4/2023

Type:

Student Satisfaction Survey

Allow Saving:

☒

Form:

Course Evaluation

Save Expires After:

Never

Branding:

Form Branding

URL:

https://onboarding.jobreadyplus.com/rea/survey/90925

2

RESPONSES

Open

STATUS

7

QUESTIONS

2

PAGES

Course Evaluation

https://onboarding.jobreadyplus.com/rea/survey/90925

SUMMARY

RESPONSES

Export

2

Total Responses

2

Responses Today

2

Responses This Month

1/3/2023

Started

1/4/2023

Ends

Open

Status

Responses


1 - 2 of 21 Page

Response #1

Submitted: 02-03-2023 09:47:15 AM

Response #2

Submitted: 02-03-2023 09:49:01 AM

 **readytech**

ReadyTech Education

417

Surveys

Student Specific

Surveys can be created using Feedback Forms

These are documented against a specific party record (NOT anonymous)

Administration > Forms > Feedback Forms

Can publish by:

1. student portal (every student)
2. distribute link (a specific selection of students)

Party Form > New

save cancel

Details

*Name: Placement Feedback Survey ⓘ

*Category: Feedback x ⓘ

Branding: Form Branding x

Assignee: User: Andrew Adams (00020021) x ⓘ

URL: https://onboarding.jobreadyplus.com/survey/30299?party_identifier={Party Identifier}

Settings

Enabled: ☒

Add to all Host Families: ☐

Allow Party Entity Data Import: ☒ ⓘ

Allow Saving: ☒

Save Expires After (h): hour(s) ⌵

Link: ☐ Services ⓘ

Make available for all employers: ☐

Make available for all individuals: ☒

Publish to Student Portal: ☒ Form ⓘ ☐ Submitted Form ⓘ

save cancel

Surveys

Student Specific

1. Student portal option

Administration > Configuration >
Preferences > Self-Service Portals

Disable Display > Hide Forms Section

Enable Dashboard > Forms

Display

Combine subject Elements

Hide Academic Periods

Hide Applications section

Hide Attendee Counts

Hide Chat

Hide Contacts on Profile

Hide Course Application Defer button

Hide Courses section

Hide CPD Tracker

Hide Documents section

Hide Employer Section

Show Extension Request button only for Individual Group Type

Hide Events

Hide Extension Request Button for Past Services

Hide Finance section

Hide Forms section

Hide Messages section

Hide Services section

Hide Subjects

Disable Extension Request Start Date

Hide Units

Hide Useful Links widget

Hide Useful Links

Publish Certificates:

Hide Course Dates on Applications:

None

All

Portal Enabled

Dashboard

New Dashboard

Accommodation

Applications

Attendance

Courses

Documents

Finance

Homestay

Messages

Placement

Services

Timetable

USI

Activities

Assignments

Chat

CPD Tracker

Employer

Forms

Learning Support

Online Learning

Profile

Student Support

Useful Links

Surveys

Student Specific

Student Portal View

Dashboard

General

Chat

Timetable

Documents 2 new

Forms

Forms

This page contains all the required forms.

Enrolment

- Additional Document Upload
- AVETMISS Details

Feedback

- Placement Feedback Survey

Placement Feedback Survey

1

Please answer the following questions on your recent placement activity

Is there anything you'd like to tell us about your recent experience?

Please rate your experience on a score of 1 (very poor) to 5 (excellent)

1

5

1

Would you recommend this experience to future students?

Yes

No

Save

Submit

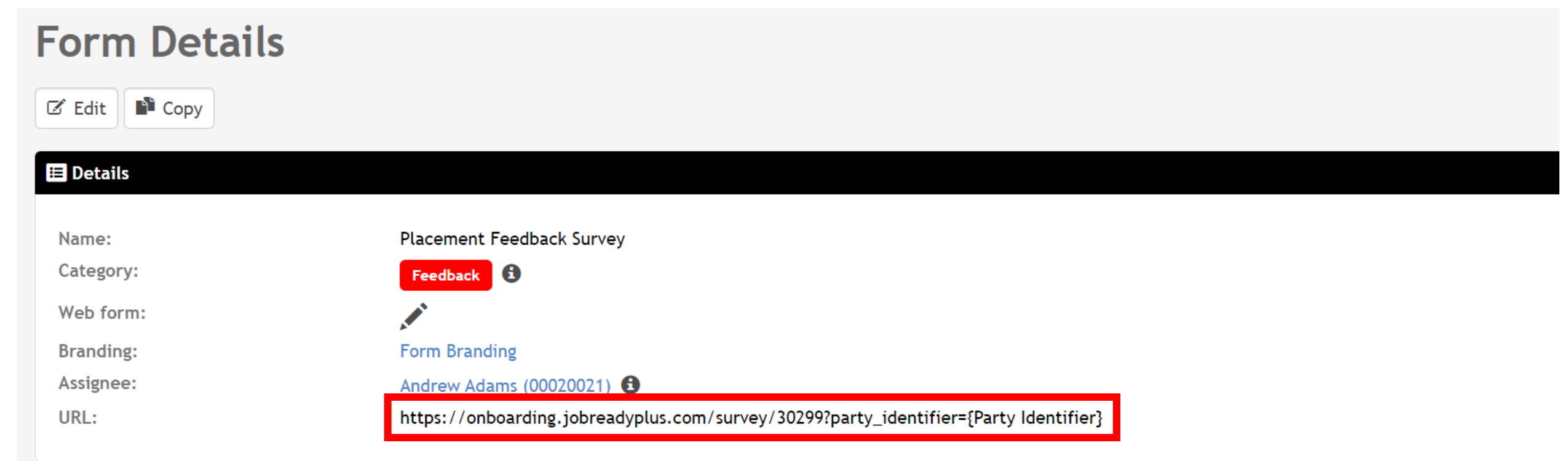
Surveys

Student Specific


2. Distribute link to a group

Administration > Forms > Feedback Form
> select form

- Paste URL into a group specific email template e.g.:
 - Course level
 - Party level
- Change the words {Party Identifier} to the party ID merge tag before you send the email
 - See [Template Field Mappings Index](#)



The screenshot shows the 'Form Details' page for a 'Placement Feedback Survey'. At the top, there are 'Edit' and 'Copy' buttons. Below this is a 'Details' section with the following information:

Name:	Placement Feedback Survey
Category:	Feedback ⓘ
Web form:	
Branding:	Form Branding
Assignee:	Andrew Adams (00020021) ⓘ
URL:	https://onboarding.jobreadyplus.com/survey/30299?party_identifier={Party Identifier}

The URL field is highlighted with a red border.

Surveys

Student Specific

View responses in:

Communication > Feedback > Forms

Student party record > Feedback Forms > Submitted Forms

Feedback Forms

Search

Enter Name or Party ID

Filters

Saved Filters

Search

Save

Clear

Export

Search Results

Bulk Actions

1 - 12 of 12

1 Page

ID	Party Name	Party ID	Form Name	Category	Assignee	Created On	Updated On	Status	Last Updated By	
FB000012	Smith, Spencer	00020006	Placement Feedback Survey	Feedback	Andrew Adams (00020021)	9/3/2023 09:39:27 AM	9/3/2023 09:39:27 AM	Complete	Smith, Spencer	
FB000011	Sullivan, Jullian	00020073	AVETMISS Details	Enrolment	Bridgette Kaminski (00020000)	7/3/2023 03:56:31 PM	7/3/2023 03:56:31 PM	Complete	Kaminski, Bridgette	

Lets go do it!

Let's take a look at:

- Create a anonymous survey for students



 readytech

Summary

What have we done today?

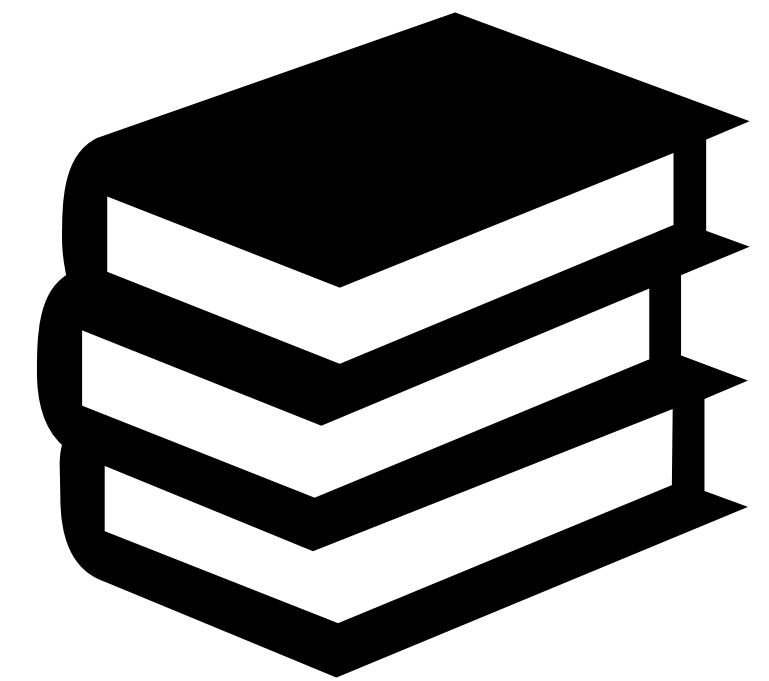
- Notes and checklists
- Document upload
- SMS
- Emails
- Letters and forms
- Templates
- Surveys



Action Items

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

- Create a note
- Upload a document to a party profile
- Send an SMS from a party profile
- Send emails from within a Course
- Sending an Email for an event
- Create the required email templates
- Create a survey for future use

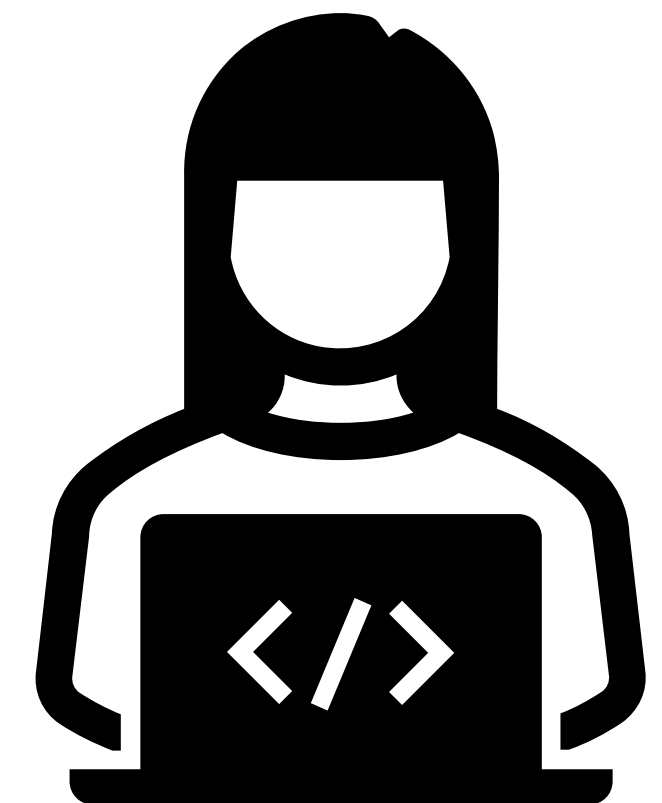


Enjoyed today's session?

[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

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- P: 02 9018 5525

Onboarding

- E: customeronboarding@ewp.readytech.io