Topic 9 - Additional Features
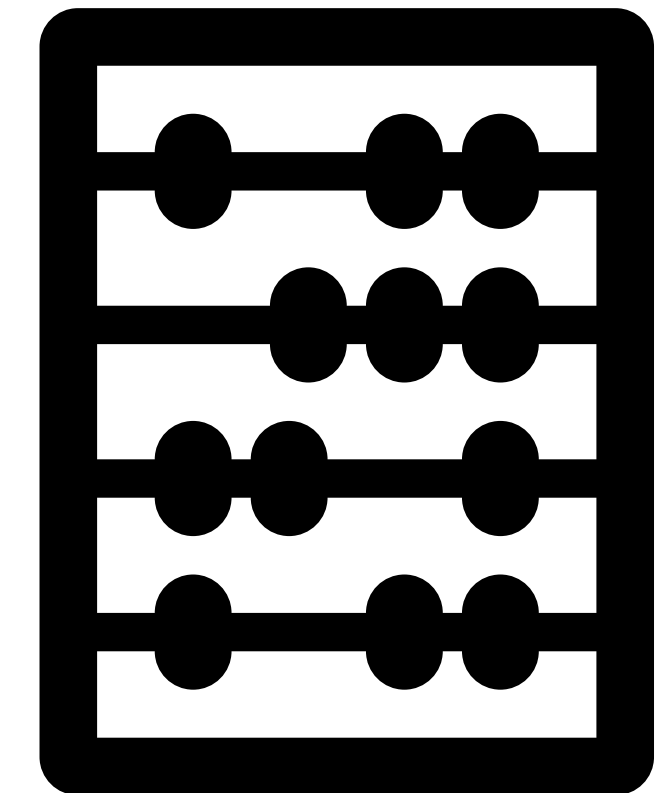
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Additional Features

Communication

Student Portal and Trainer View

Topic 9.1 - Communication

Agenda

System & Security

↓

Site Setup

↓

Curriculum Management

↓

Courses | Online Enrolment

↓

Finance

↓

Student Life Cycle

↓

Reporting

Additional Features
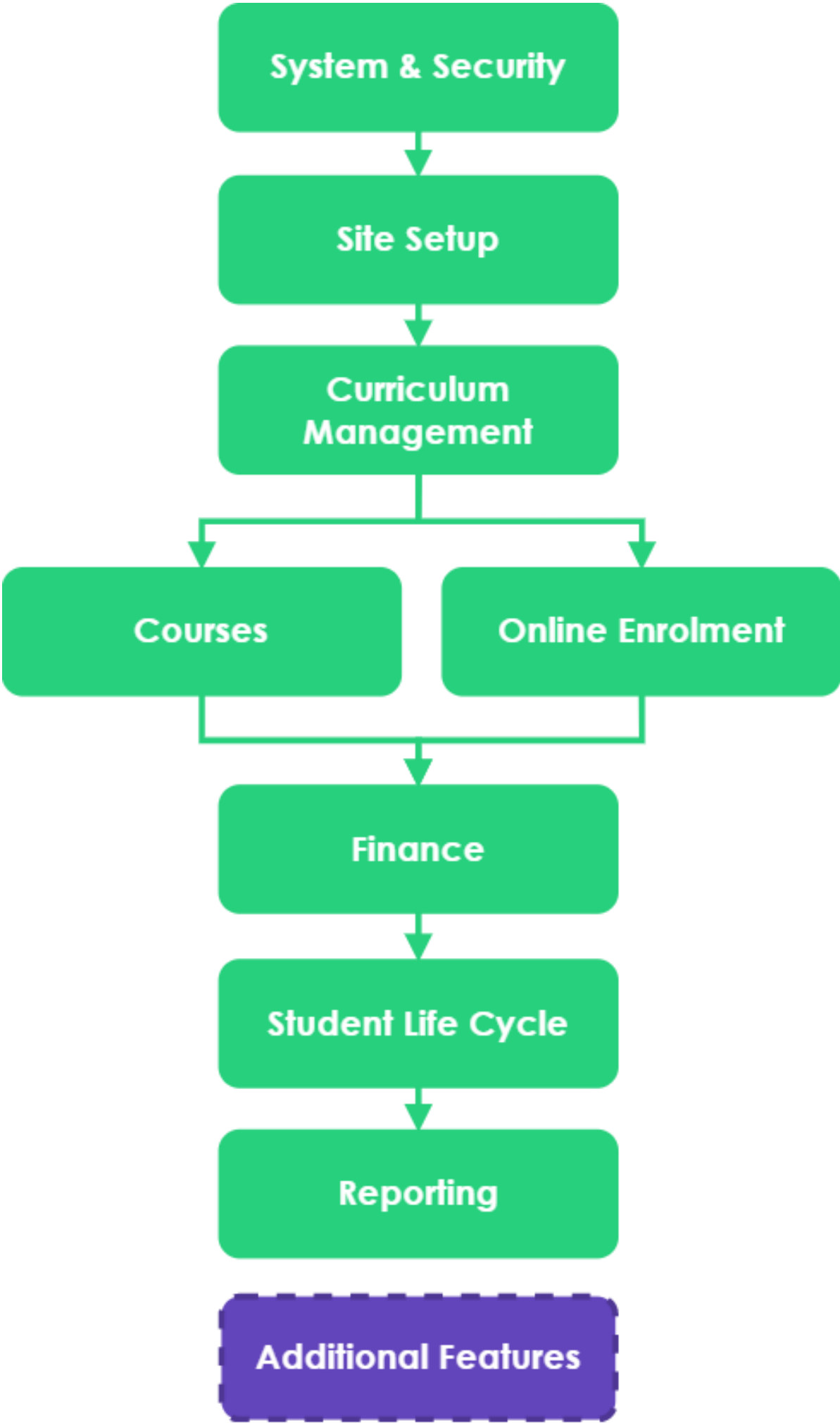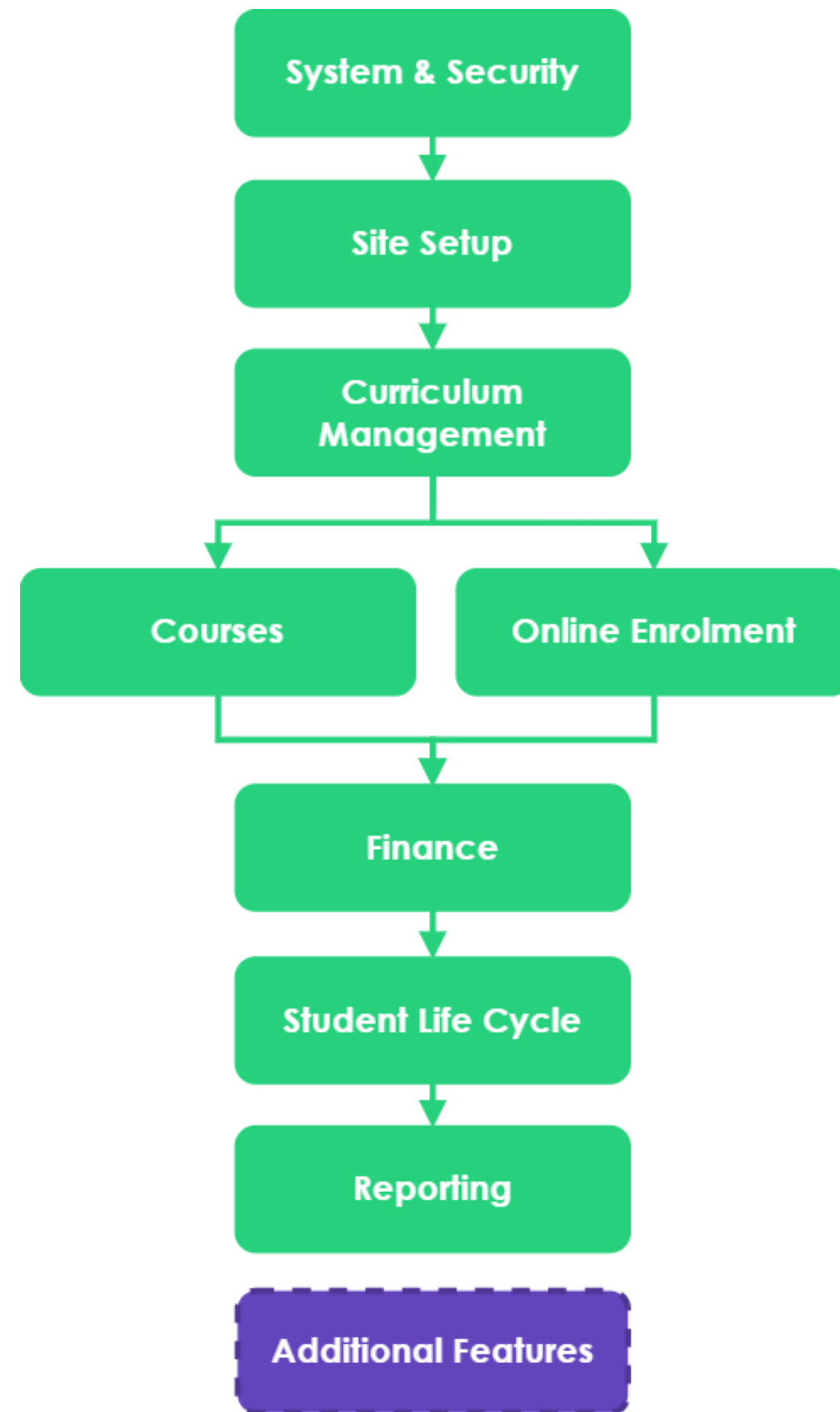
Topics Covered	
1	Notes and Checklists
2	Uploading Evidence
3	SMS
4	Emails
5	Letters and Forms
6	Templates
7	Surveys

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

![readytech](readytech logo)

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

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

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 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

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

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

![readytech logo]

ReadyTech Education

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

Uploading Evidence

Uploading Evidence

Document View

Documents can also be viewed in document view by swapping using the icon to the right of the screen
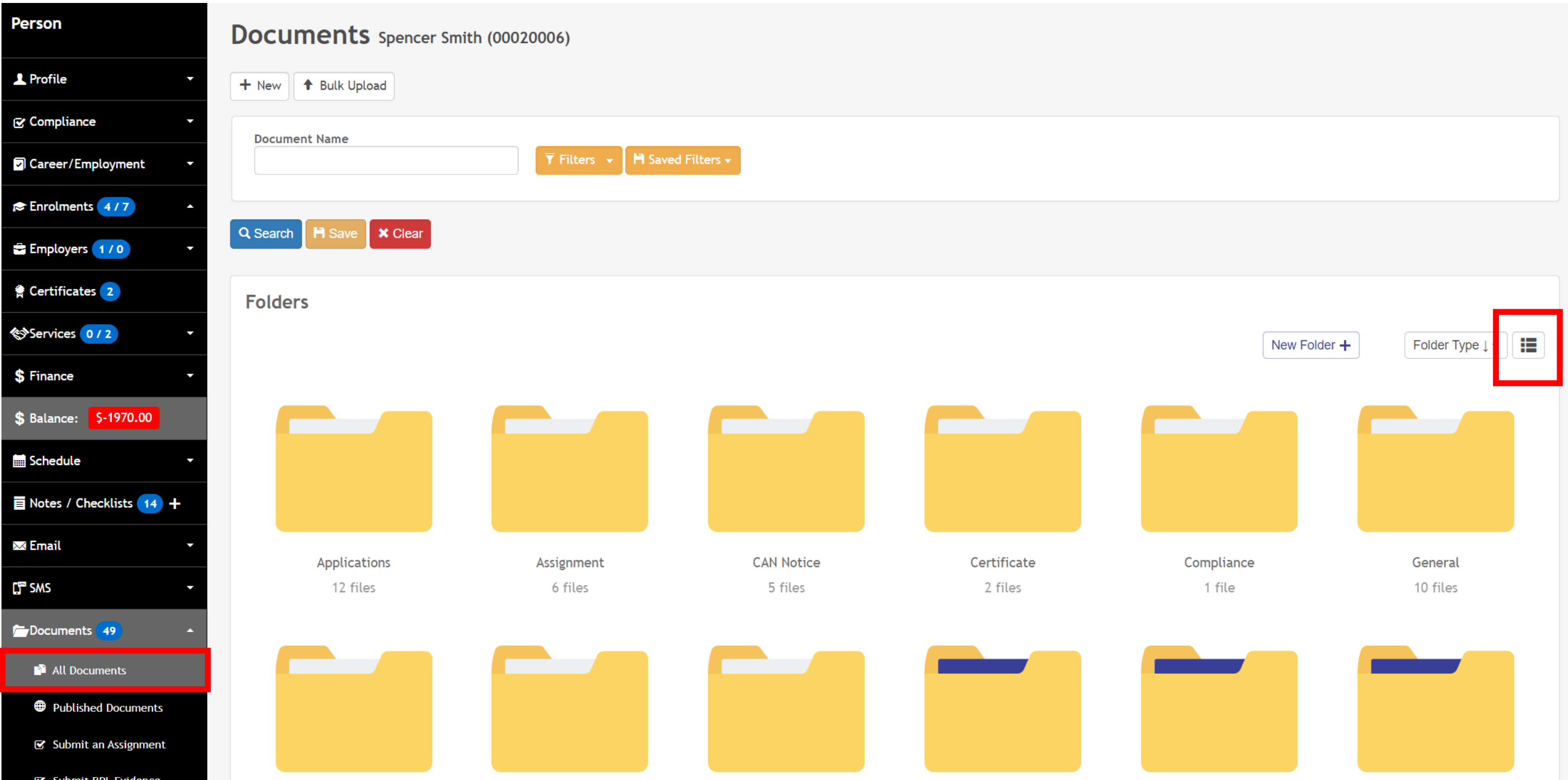
Lets go do it!

Let's take a look at:

- Creating a Note / Checklist for a party

- Upload Evidence (a document) for a party

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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
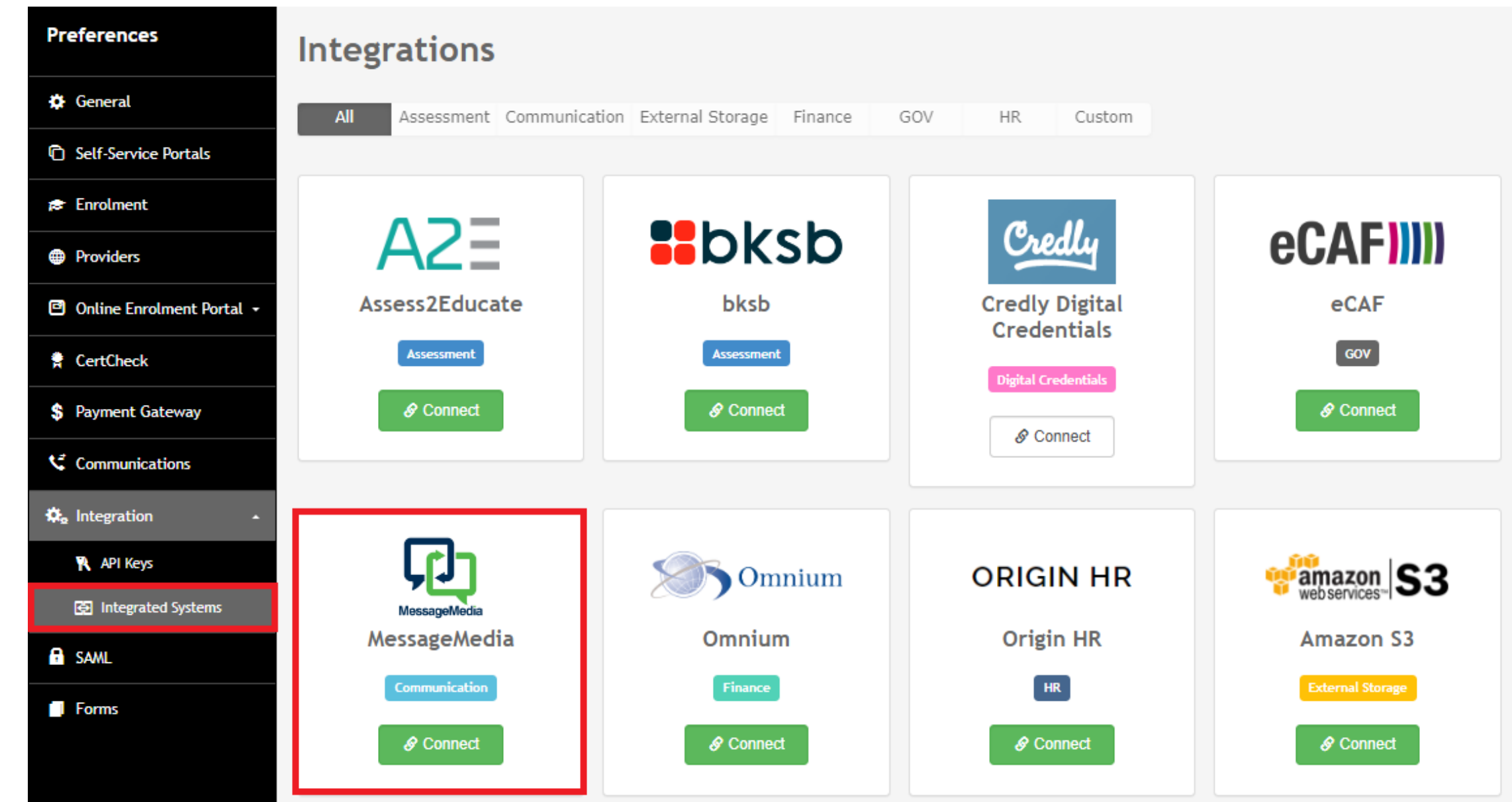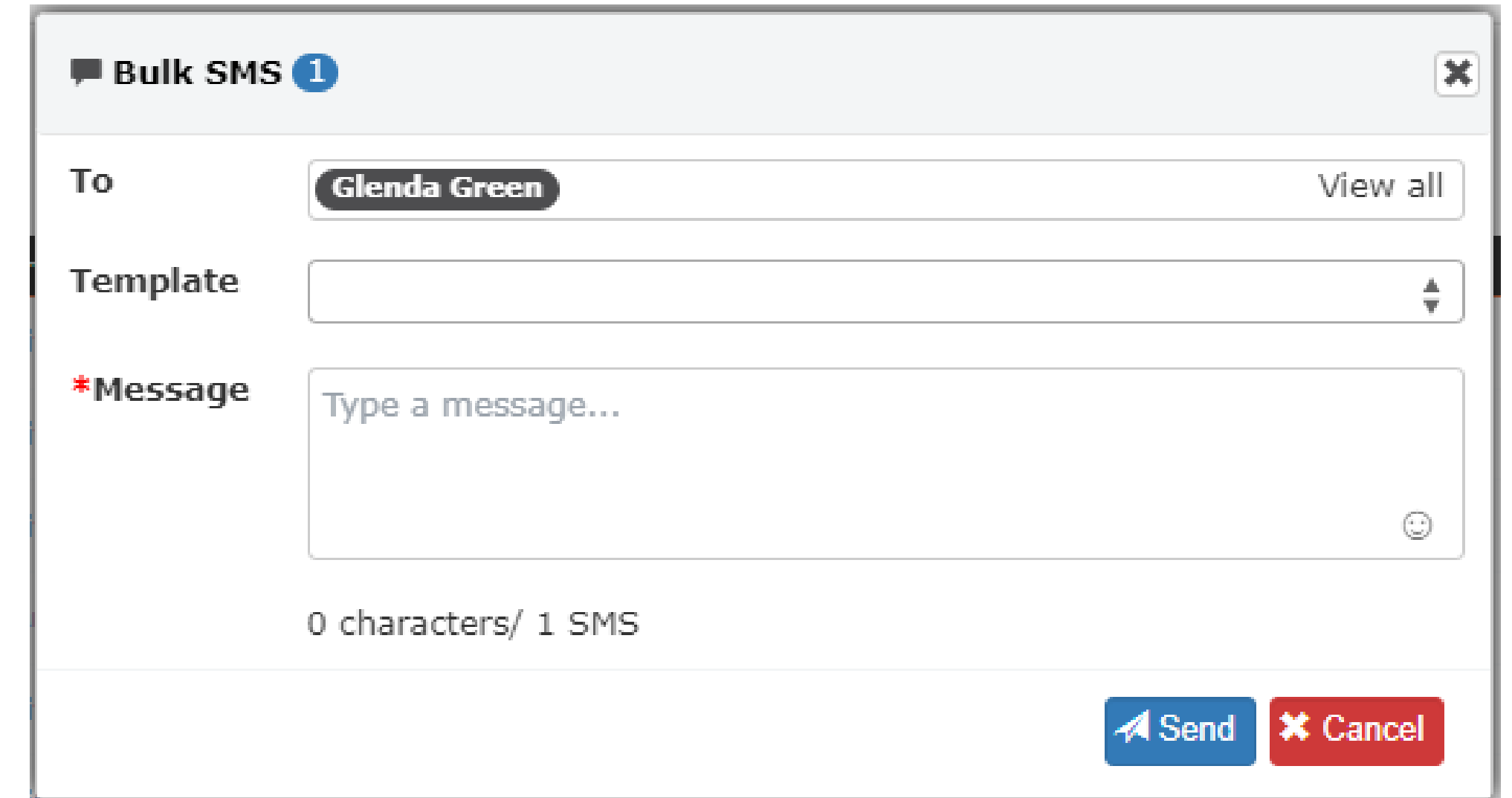
SMS

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

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

Email

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

Email

Attaching PDFs

PDFs can be attached to an email

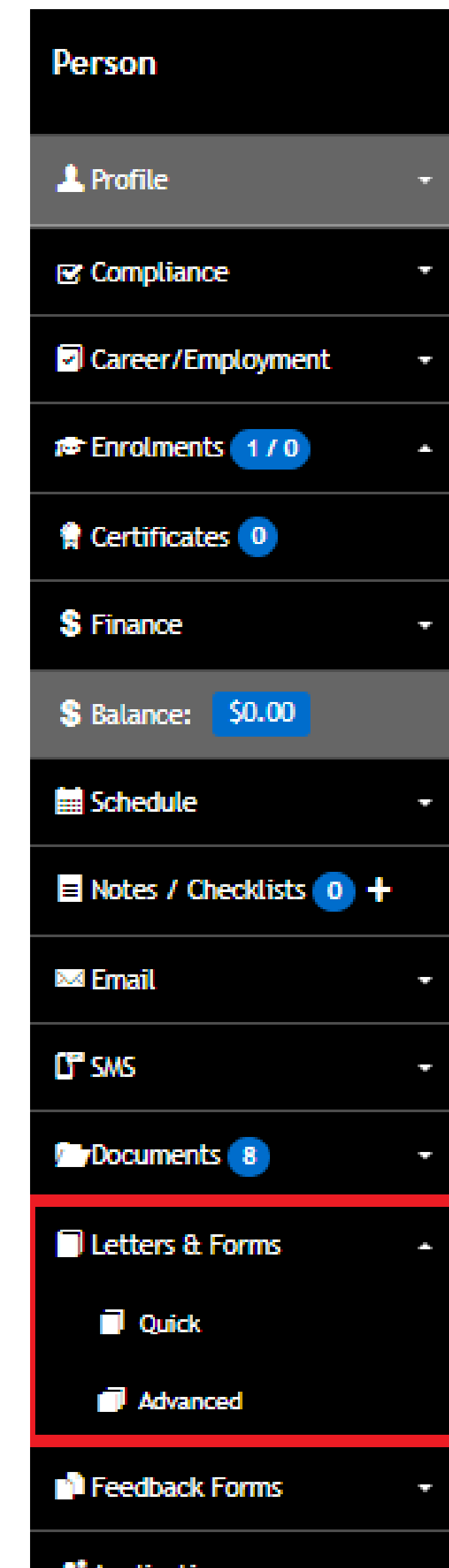These can be external or from within the Documents list

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

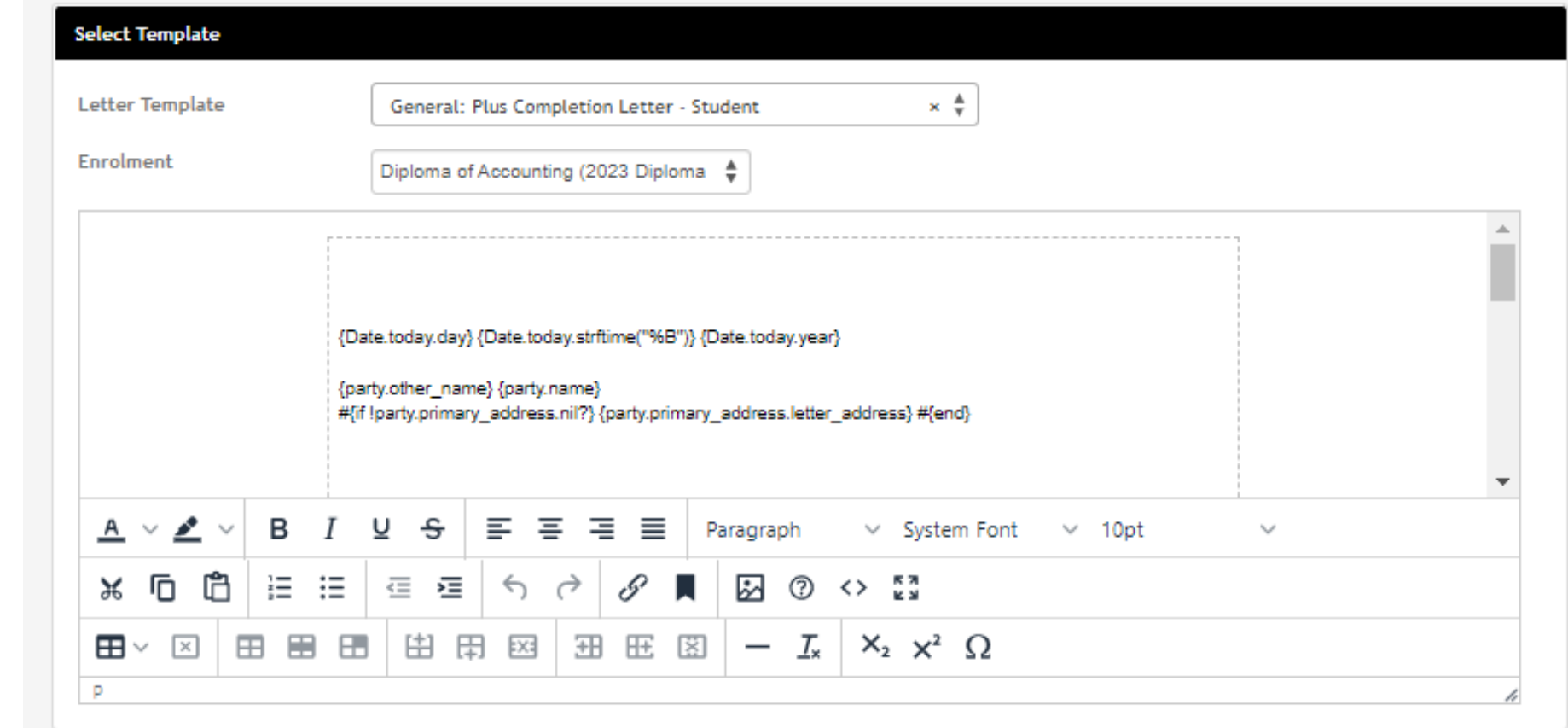Course > Course List > search and select course > Letters and Forms
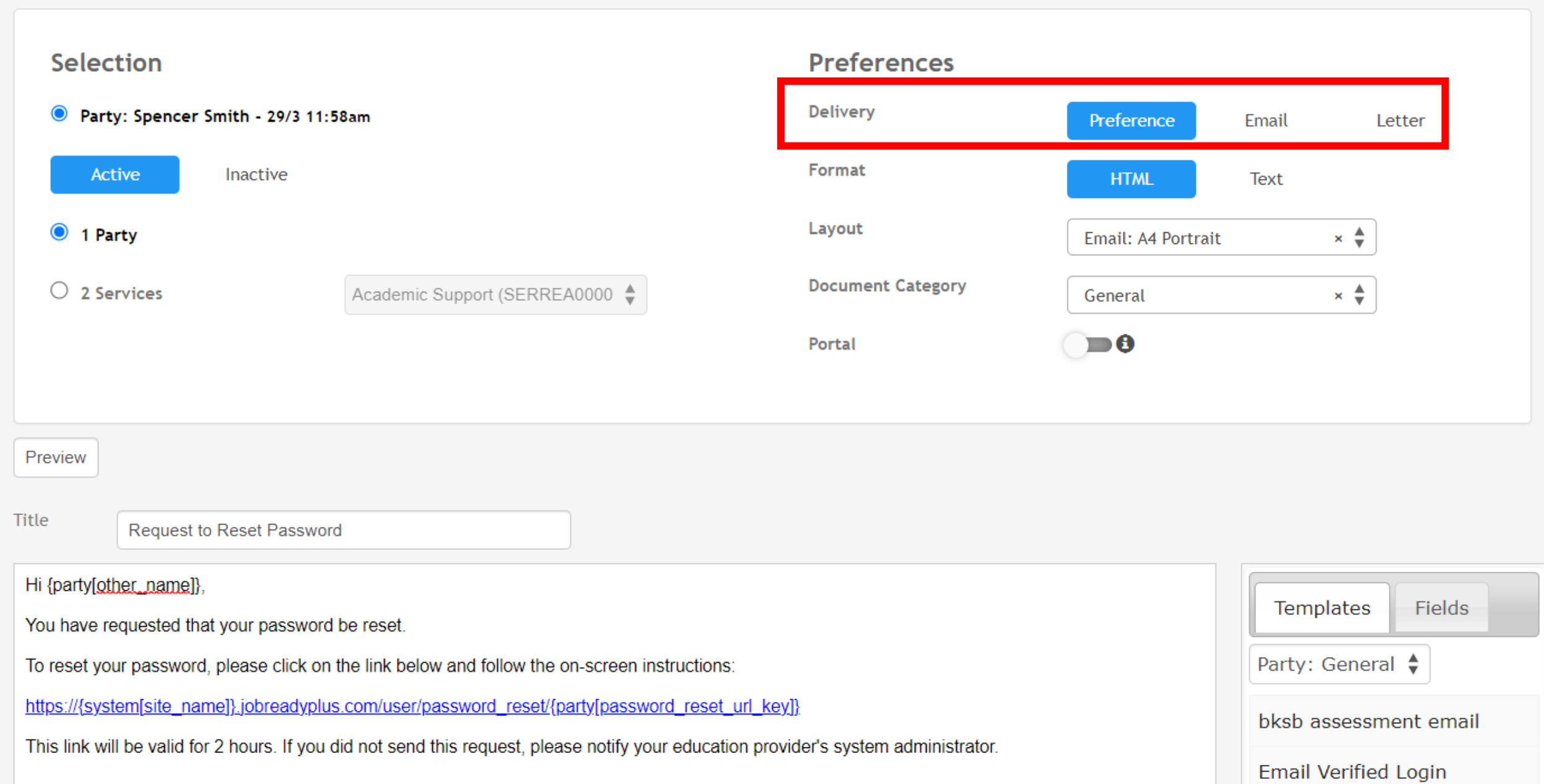
Letters and Forms

Two options:

- **Quick**
  Good for creating PDF documents against a party/enrollment/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

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
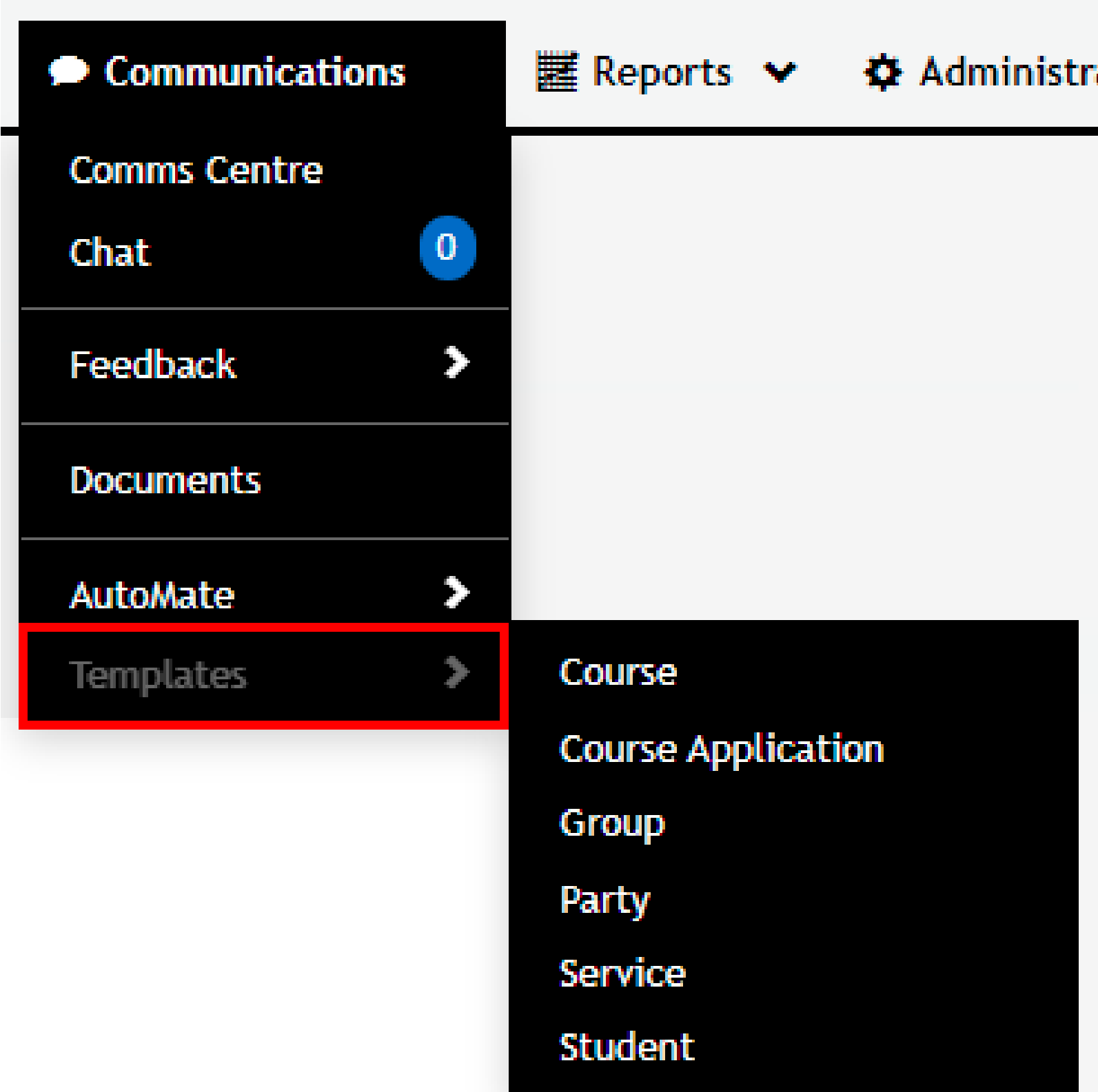
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Templates

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)

Templates

Notes

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

Communications > Template > Student > Notes > Template

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

Communications > Template > Student > Notes > Categories

Templates

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

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

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
		Note: shows ABN listed on details page and not what is displayed in international settings
address_list	Full Address list	Party profile > Details page > Address
		Note: only includes street number, Street name and suburb
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

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Surveys

Surveys

Uses

Allow you to track information anonymously

e.g.

- Workplace visits

- Course evaluations

Great for:

- Student satisfaction

- Staff satisfaction

- General anonymous feedback

Surveys

Create the Survey

1. Build the form settings

Administration > Forms > Survey Forms

Surveys

Create the Survey

2. Build the form content

Administration > Forms > Survey Forms

Surveys

Create the Survey

3. Set up the survey

Communications > Feedback > Surveys

Surveys

Create the Survey

4. Create email template

Communications > Feedback > Surveys

e.g. for all students in a Course

Communications > Templates > Course > add new

Surveys

Create the Survey

5. Distribute survey link

Send through

Courses > Course List > select course > Email > Compose

Surveys

View Results

Communications > Feedback > Surveys

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)

Surveys

Student Specific

1. Student portal option

Administration > Configuration > Preferences > Self-Service Portals

Disable Display > Hide Forms Section

Enable Dashboard > Forms

Surveys

Student Specific

Student Portal View
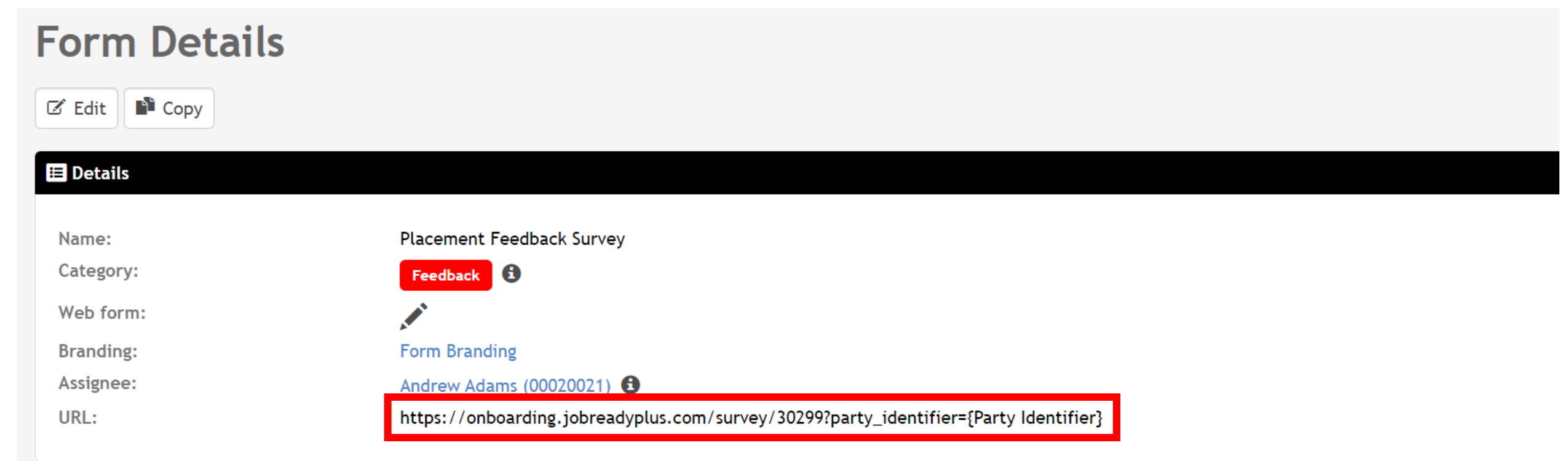
Surveys

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

Surveys

Student Specific

View responses in:

Communication > Feedback > Forms

Student party record > Feedback Forms > Submitted Forms

Lets go do it!

Let's take a look at:

- Create a anonymous survey for students

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Summary

What have we done today?

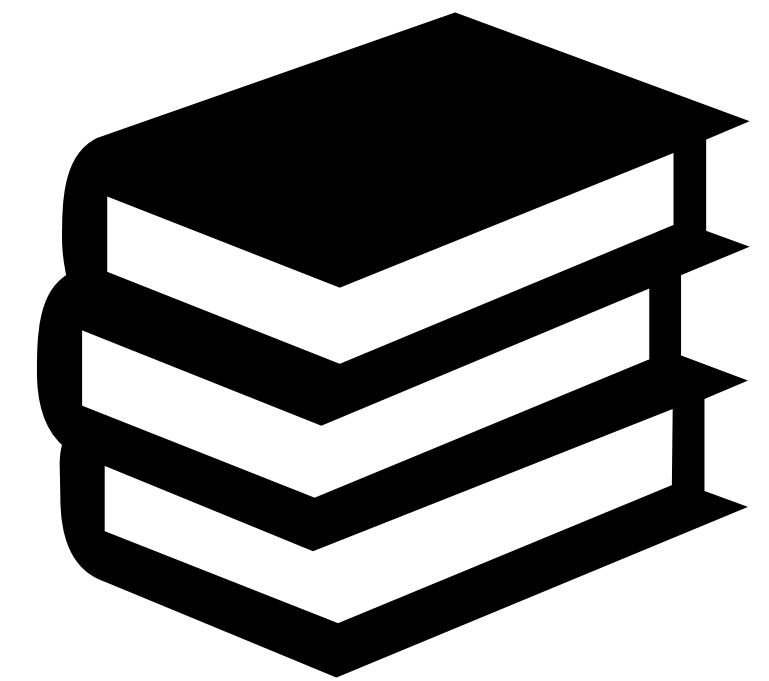- Notes and checklists

- Document upload

- SMS

- Emails

- Letters and forms

- Templates

- Surveys

Action Items

What do I need to do after todays 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
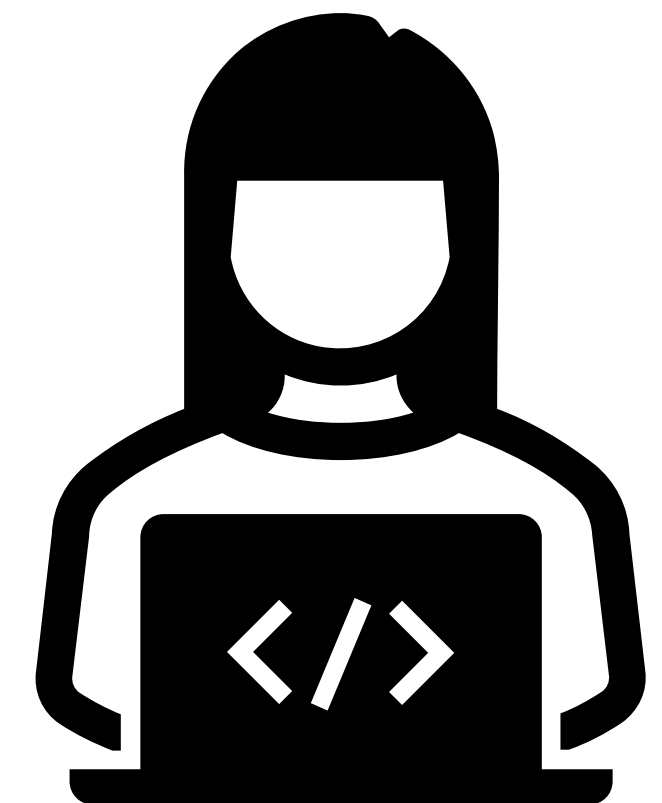
Thank you

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